

## Linking the Custom CARLI\_Reports\_20XX.mdb File

Periodically, CARLI releases a custom **CARLI\_reports\_20XX.mdb** (where **XX** is the year the file was released). This file contains the Ex Libris prepackaged reports that are suitable for the I-Share environment, and also contains shared SQL and other statistical queries provided by CARLI.

The latest custom file can be downloaded from the CARLI website at <https://www.carli.illinois.edu/products-services/i-share/execute>: look for the “Latest version of custom CARLI\_Reports\_20XX.mdb.”

CARLI strongly recommends that you use the latest CARLI custom file in place of the generic Reports.mdb file or the previous custom CARLI\_reports.mdb file. For more information about what is included in the current custom file, see

<http://www.carli.illinois.edu/products-services/i-share/reports/secure/CARLI-reports2016-info>.

For information on how to “copy” queries from your previous .mdb file into a new .mdb file, see

<http://www.carli.illinois.edu/products-services/i-share/reports/secure/copying-queries>

This document presumes that you have already completely installed Oracle 10g and ODBC on your PC according to the CARLI specifications. If you have not, please see the Installation instructions at [http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/newinstall\\_10g.pdf](http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/newinstall_10g.pdf).

These instructions apply only to running 32-bit versions of Microsoft Access 2002 and later. The Oracle10g client may not function with 64-bit access. See “Known Issues for 64-bit Windows and Office” in Appendix B for more details on supported software.

### ***Instructions for MS Access 2010 or later***

***Linking instructions for MS Access 2007 begin on page 6***

***Linking instructions for MS Access 2003 or earlier begin on page 11***

Note: Screenshots may depict both Access 2010 and 2013

#### **1. Set Macro Security Level**

- a. Start MS Access
- b. Select the File tab
- c. Click Options
- d. Select the “Trust Center” in the left-hand pane. Select “Trust Center Settings...”
- e. Select “Macro Settings” in left-hand pane. Select the radio button next to “Enable all macros (not recommended; potentially dangerous code can run)” Click OK. Click OK again.
- f. **You must Exit and restart MS Access**

#### **2. Decide if you will use the default Reports.mdb file or the CARLI\_reports\_2016.mdb file (see *Before You Start* section above).**

- a. Navigate to the file on your PC
- b. Highlight the file and either Right-click or use the Edit menu to either make a copy of the file or to rename the file: eisreport.mdb
- c. Copying and/or Renaming this file will help you to know that this is the file you have linked up to

the database, and may help to identify it after future upgrades.

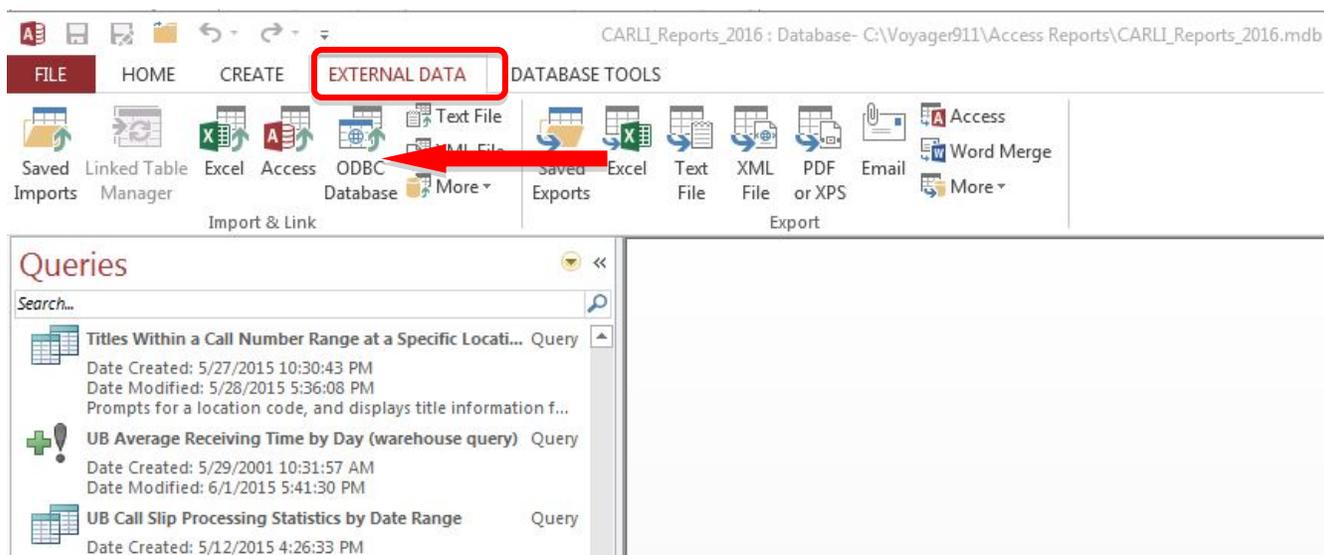
d. The remainder of these instructions will refer to this file as **eisreport.mdb**

3. Open the **eisreport.mdb** file in MSAccess

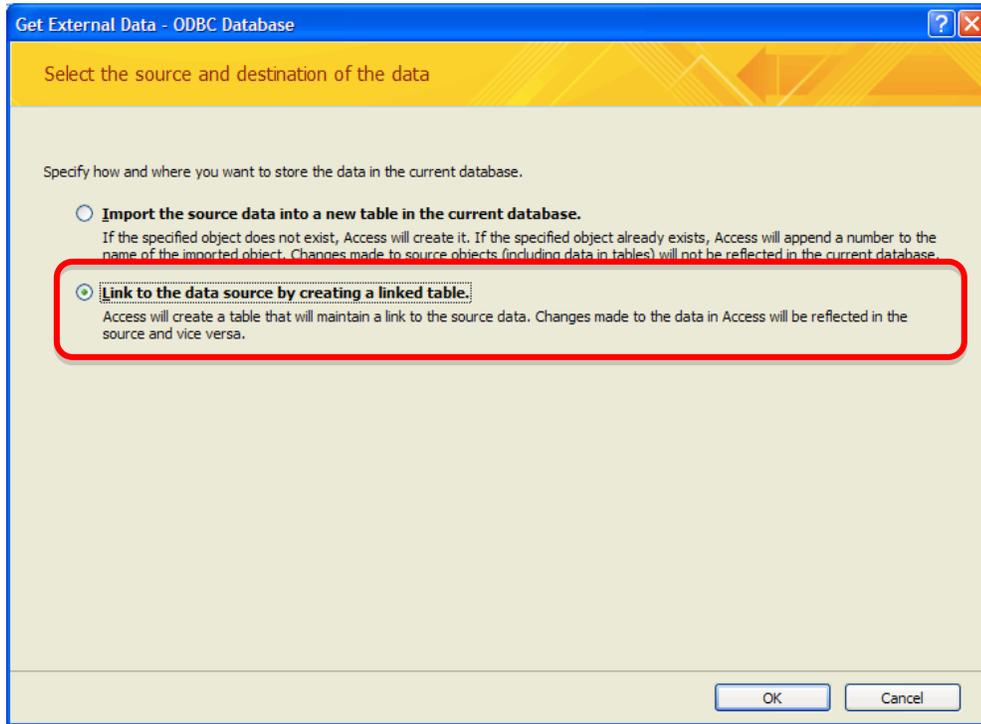
4. Prepare the file for linking

a. Click on “External Data” tab

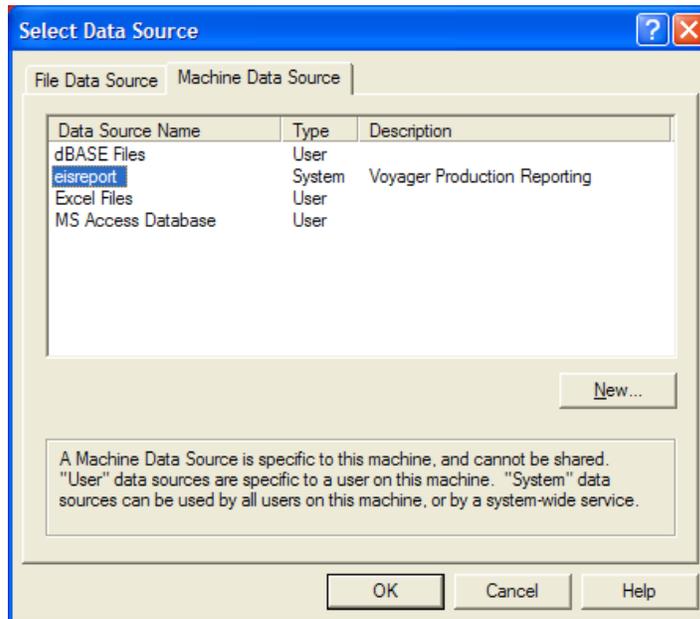
b. Select “ODBC Database”



c. The “Get External Data-ODBC Database” screen pops up. Select “Link to the data source by creating a linked table.” Click OK.



- d. The “Select Data Source” screen pops up. Select “Machine Data Source” tab, choose “eisreport” and click OK.

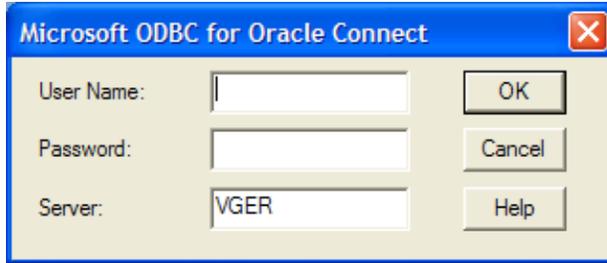


If you receive a security warning that says some content was disabled, choose to “Enable this content”.

If you do not see eisreport listed as a Data Source Name, click Cancel. Verify whether you are using a 32-bit or 64-bit version of Access (Go to File, Account, About Access).

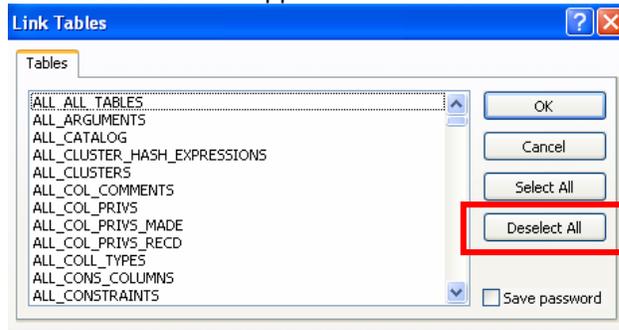
- e. The “Microsoft ODBC for Oracle Connect” screen pops up.

- i. For User Name enter <your Oracle username>
- ii. For Password enter <your Oracle Password>
- iii. For Server enter **VGER**
- iv. Click **OK**.



**NOTE:** It may take a few minutes before the next screen appears.

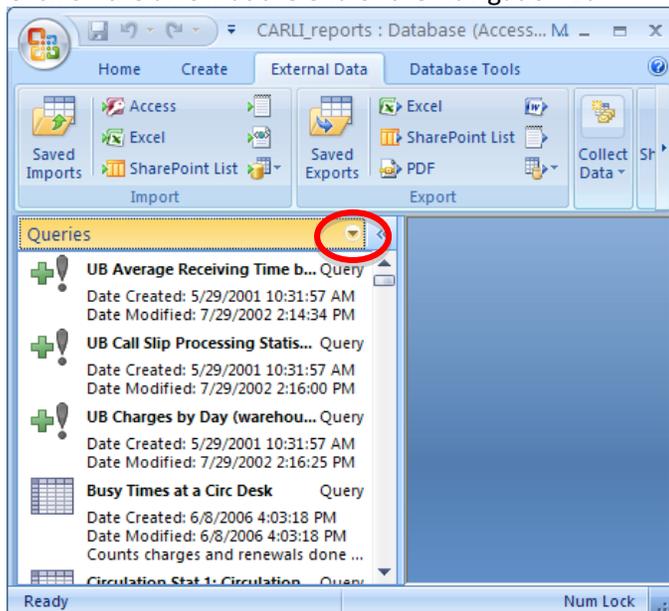
- f. The **Link Tables** screen will appear. **Click Deselect All.**



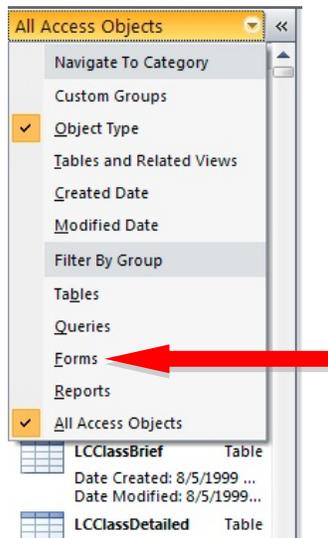
- g. The box should briefly refresh and the Deselect All button will pop back up. Then click **OK**.

## 5. Build Database Links

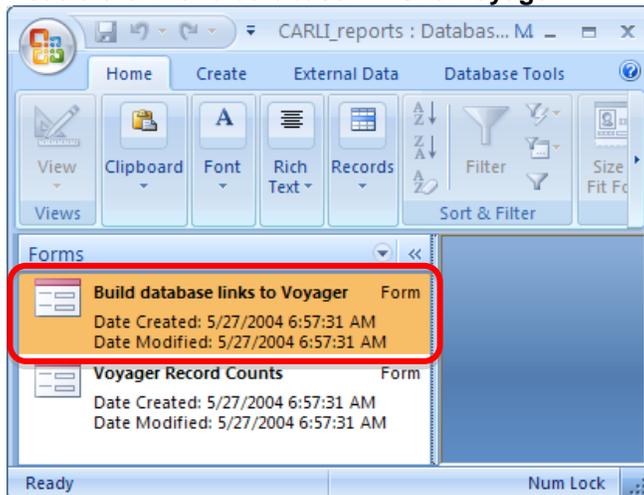
- a. Click on the arrow at the end of the Navigation Bar



b. Select Forms



c. Double-click **Build database links to Voyager**



d. The **Build links to Voyager** box will appear. Enter the following values:

<b>ODBC Name</b>	eisreport
<b>Connect String</b>	VGER
<b>DB User ID</b> (remove dbread)	<your Oracle Username>
<b>Password</b> (remove existing *s)	<your Oracle Password>
<b>Tablespace***</b>	<b>XXXDB</b>
<b>Relink checkbox</b>	Checked

\*\*\*Where **XXX** represents your I-Share Voyager three-letter code in uppercase letters. See Appendix A.

Click **Connect**.

- i. If the connection is successful, the bottom window will list each table as it is successfully linked. The ALL\_TAB\_COLUMNS table will not link. This is not an error.
  - ii. If you receive "error!" statements followed by "Process stopped too many errors!," click Close and repeat steps 4-5 again, carefully checking the information being entered. If you continue to receive error messages, contact the CARLI Office for assistance.
  - iii. The linking will take anywhere from a few minutes to several hours, depending on your network connection.
- d. When the linking is complete (after linking through tables from A to Z), click **Close** in the "Build database links to Voyager" box.

## **Prepackaged Reports are now successfully linked! You may now run queries and reports against the database.**

### ***Instructions for MS Access 2007***

***If you are using an earlier version of MS Access (2003 or earlier) please see linking instructions beginning on page 27***

#### **1. Set Macro Security Level**

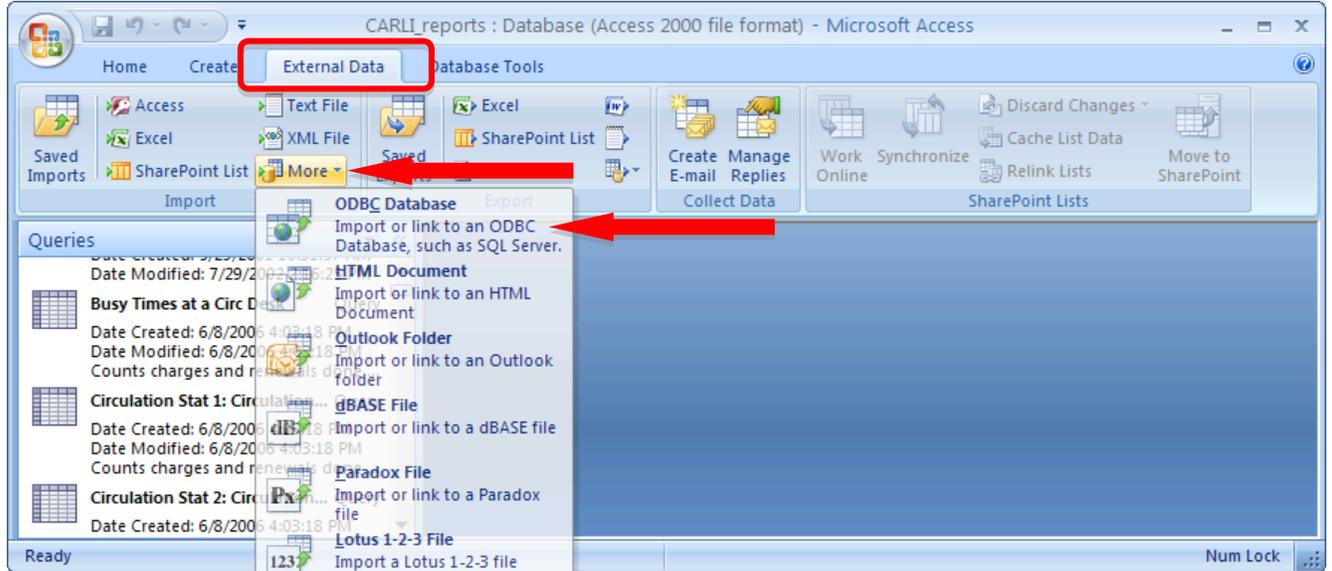
- a. Start MS Access
- b. Select the Microsoft Office Button: 
- c. Click Access Options
- d. Select the "Trust Center" in the left-hand pane. Select "Trust Center Settings..."
- e. Select "Macro Settings" in left-hand pane. Select the radio button next to "Enable all macros (not recommended; potentially dangerous code can run)" Click OK. Click OK again.
- f. **You must Exit and restart MS Access**

#### **2. Decide if you will use the default **Reports.mdb** file or the **CARLI\_reports\_2016.mdb** file (see *Before You Start* section above).**

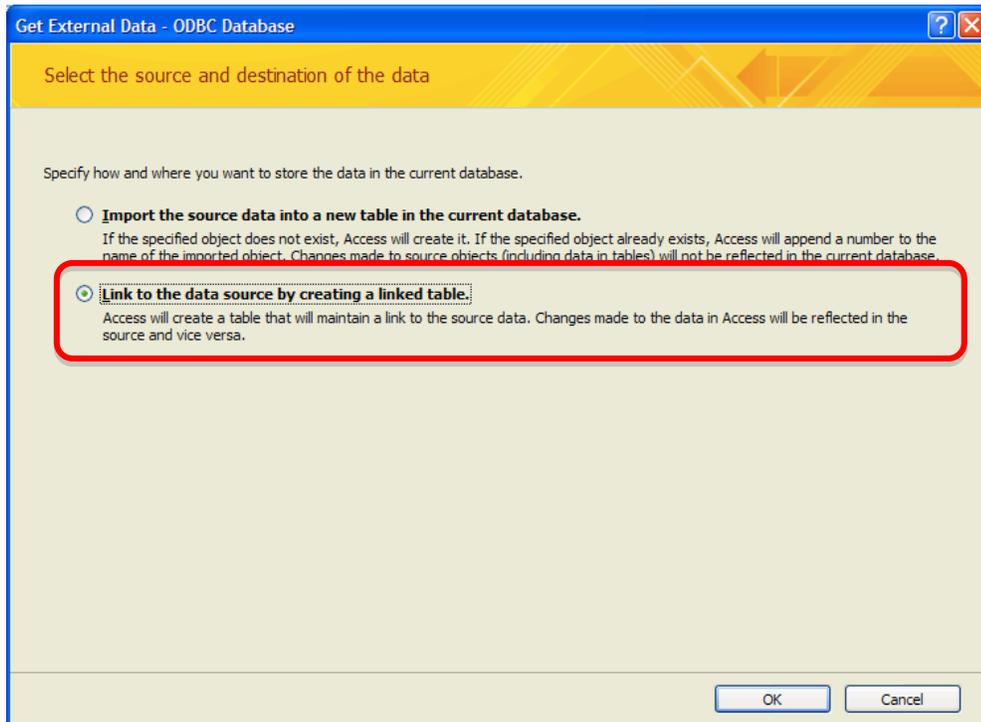
- a. Navigate to the file on your PC
- b. Highlight the file and either Right-click or use the Edit menu to either make a copy of the file or to rename the file: eisreport.mdb
- c. Copying and/or Renaming this file will help you to know that this is the file you have linked up to the database, and may help to identify it after future upgrades.
- d. The remainder of these instructions will refer to this file as **eisreport.mdb**

#### **3. Open the **eisreport.mdb** file in MSAccess**

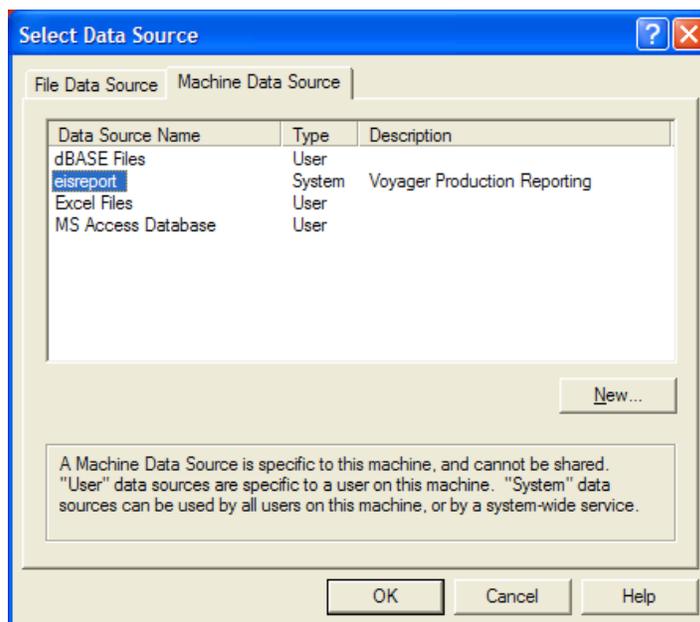
4. Prepare the file for linking
  - a. Click on "External Data" tab
  - b. Click on the "More" arrow in the "Import" section
  - c. Select "ODBC Database"



- d. The "Get External Data-ODBC Database" screen pops up. Select "Link to the data source by creating a linked table." Click OK.

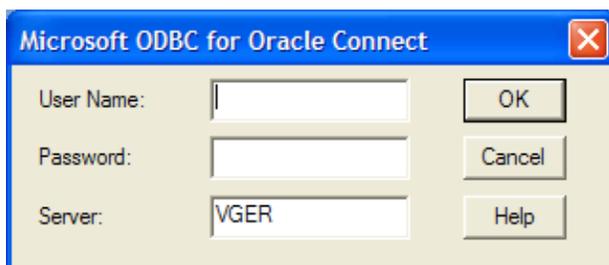


- e. The “Select Data Source” screen pops up. Select “Machine Data Source” tab, choose “eisreport” and click OK.



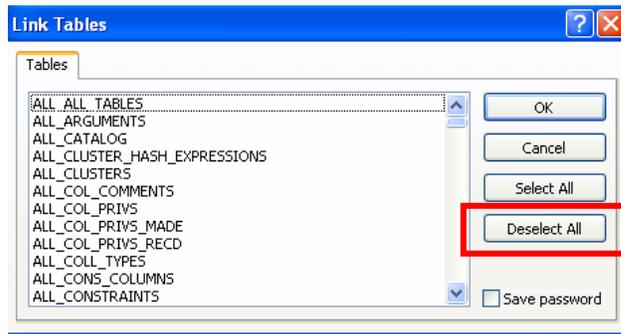
If you receive a security warning that says some content was disabled, choose to “Enable this content”.

- f. The “Microsoft ODBC for Oracle Connect” screen pops up.
- i. For User Name enter <your Oracle username>
  - ii. For Password enter <your Oracle Password>
  - iii. For Server enter **VGER**
  - iv. Click **OK**.



**NOTE:** It may take a few minutes before the next screen appears.

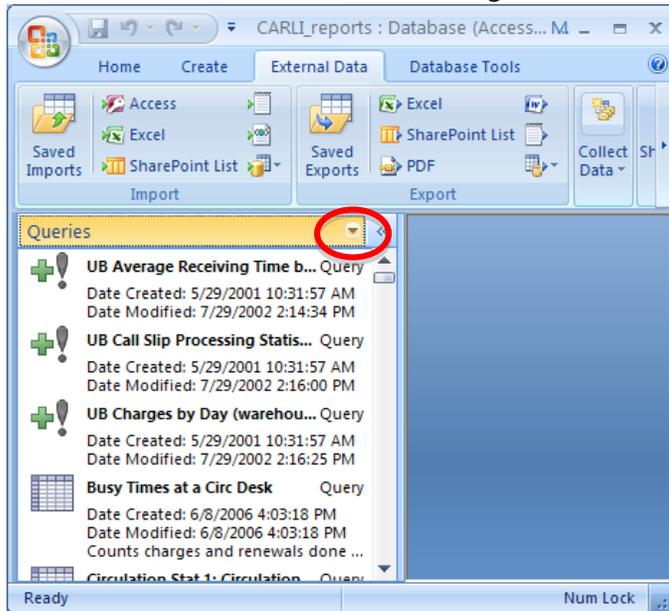
- g. The **Link Tables** screen will appear. **Click Deselect All.**



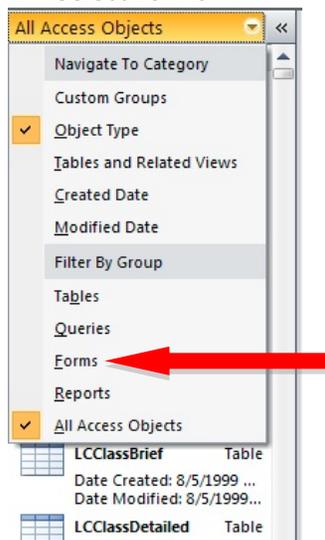
h. The box should briefly refresh and the Deselect All button will pop back up. Then click **OK**.

## 5. Build Database Links

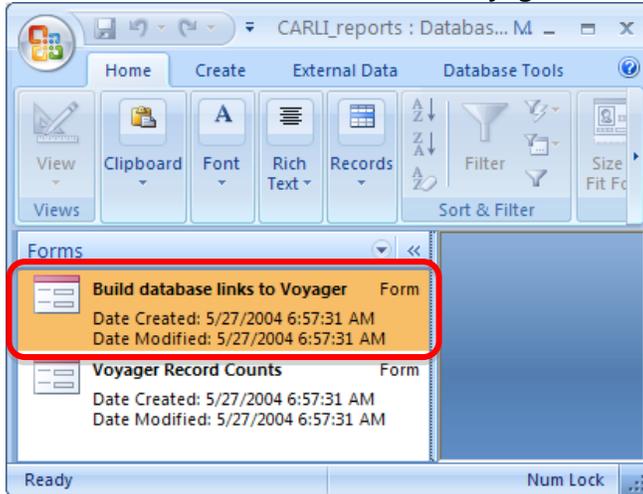
e. Click on the arrow at the end of the Navigation Bar



f. Select Forms



g. Double-click **Build database links to Voyager**



h. The **Build links to Voyager** box will appear. Enter the following values:

<b>ODBC Name</b>	eisreport
<b>Connect String</b>	VGER
<b>DB User ID</b> (remove dbread)	<your Oracle Username>
<b>Password</b> (remove existing *s)	<your Oracle Password>
<b>Tablespace***</b>	<b>XXX</b> db
<b>Relink checkbox</b>	Checked

\*\*\*Where **XXX** represents your I-Share Voyager three-letter code in uppercase letters. See Appendix A.

Click **Connect**.

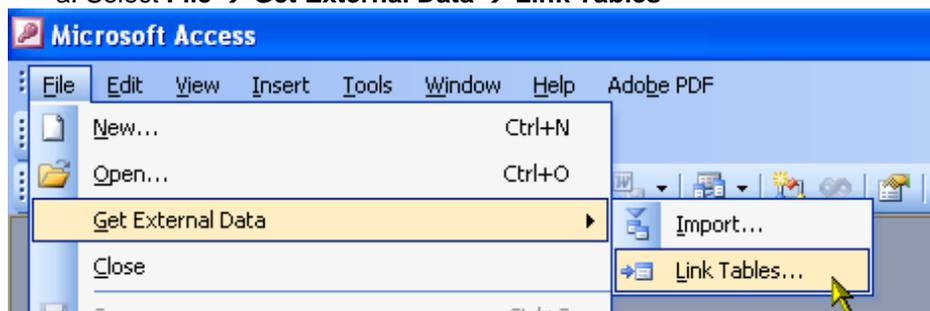
- i. If the connection is successful, the bottom window will list each table as it is successfully linked. The ALL\_TAB\_COLUMNS table will not link. This is not an error.
  - ii. If you receive "error!" statements followed by "Process stopped too many errors!," click Close and repeat steps 4-5 again, carefully checking the information being entered. If you continue to receive error messages, contact the CARLI Office for assistance.
  - iii. The linking will take anywhere from a few minutes to several hours, depending on your network connection.
- d. When the linking is complete (after linking through tables from A to Z), click **Close** in the "Build database links to Voyager" box.

**Prepackaged Reports are now successfully linked!**  
**You may now run queries and reports against the database.**

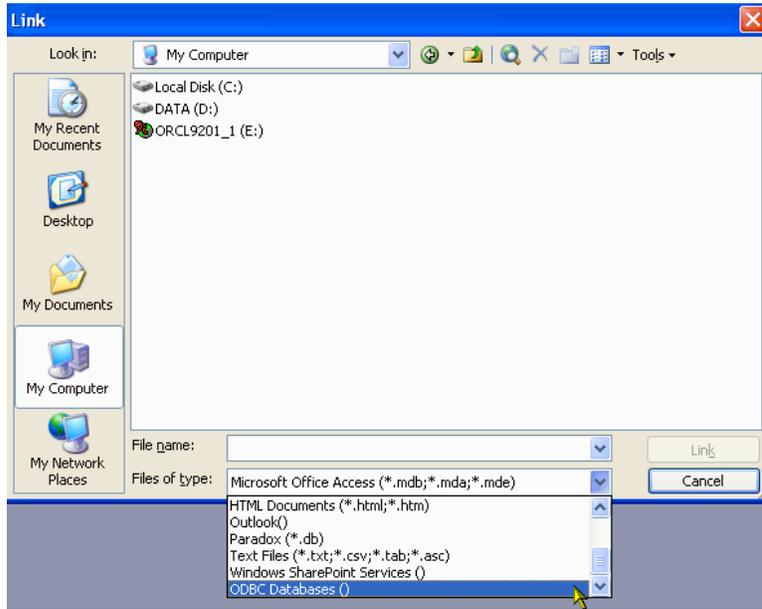
## Instructions for MS Access 2003 or earlier

0. If you are using **MS Access 2003 or later**, complete this step zero. Otherwise, proceed to step 1 below.
  - a. Start MS Access
  - b. Select **Tools → Macro → Security → Security Level** tab
  - c. Select the **Low** option
  - d. Click **OK**
  - e. You will receive a message indicating that “Unsafe expressions are blocked...Do you want to allow the evaluation of potentially unsafe expressions?” Click **Yes**
  - f. **You must Exit and restart MS Access**
1. Decide if you will use the default **Reports.mdb** file or the **CARLI\_reports\_2009.mdb** file (see *Before You Start* section above).
  - a. Navigate to the file on your PC
  - b. Highlight the file and either Right-click or use the Edit menu to either make a copy of the file or to rename the file: **eisreport.mdb**
  - c. Copying and/or Renaming this file will help you to know that this is the file you have linked up to the database, and may help to identify it after future upgrades.
  - d. The remainder of these instructions will refer to this file as **eisreport.mdb**
2. Open the **eisreport.mdb** file in MSAccess
3. Prepare the file for linking

- a. Select **File → Get External Data → Link Tables**



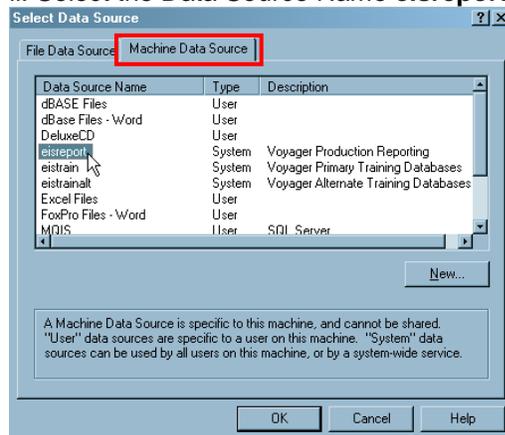
- b. A **Link** box will appear
  - i. Click the **Files of Type** drop down located at the bottom of the screen
  - ii. Select **ODBC Databases**, usually located at the bottom of the list:



c. The **Link** screen will be replaced by the **Select Data Source** screen

i. Select the **Machine Data Source** tab.

ii. Select the Data Source Name **eisreport**



iii. Click **OK**

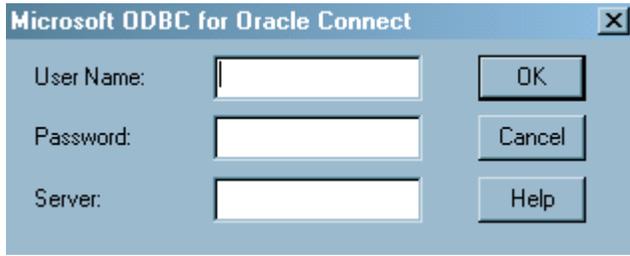
d. The **Select Data Source** window will be replaced by a **Microsoft ODBC for Oracle Connect** window.

i. For User Name enter **<your Oracle username>**

ii. For Password enter **<your Oracle Password>**

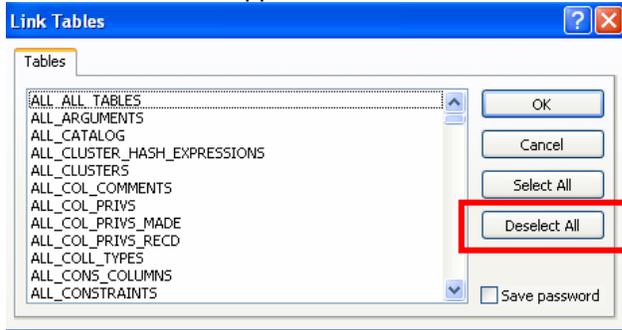
iii. For Server enter **VGER**

iv. Click **OK**.



**NOTE:** It may take a few minutes before the next screen appears.

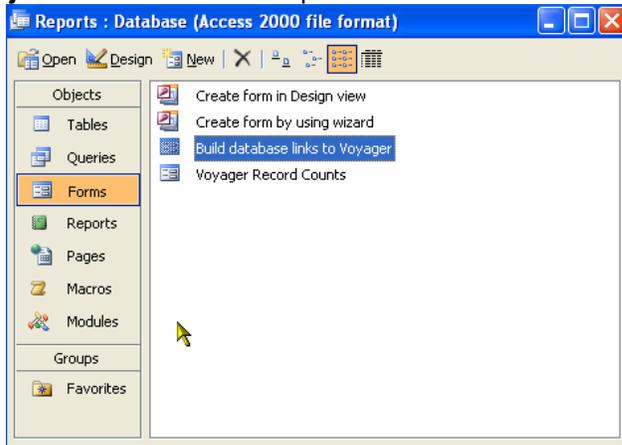
e. The **Link Tables** screen will appear. **Click Deselect All.**



f. The box should briefly refresh and the Deselect All button will pop back up. Then click **OK**.

#### 4. Build Database Links

a. Under **Objects** select the **Forms** option



b. Double-click **Build database links to Voyager**

c. The **Build links to Voyager** box will appear. Enter the following values:

<b>ODBC Name</b>	eisreport
<b>Connect String</b>	VGER
<b>DB User ID (remove dbread)</b>	<your Oracle Username>

<b>Password</b> (remove existing *s)	< <i>your Oracle Password</i> >
<b>Tablespace***</b>	<b>XXXdb</b>
<b>Relink checkbox</b>	Checked

\*\*\*Where **XXX** represents your I-Share Voyager three-letter code in uppercase letters. See Appendix A.

Click **Connect**.

- i. If the connection is successful, the bottom window will list each table as it is successfully linked. The ALL\_TAB\_COLUMNS table will not link. This is not an error.
  - ii. If you receive "error!" statements followed by "Process stopped too many errors!," click Close and repeat steps 4-11 again, carefully checking the information being entered. If you continue to receive error messages, contact the CARLI Office for assistance.
  - iii. The linking will take anywhere from a few minutes to several hours, depending on your network connection.
- d. When the linking is complete (after linking through tables from A to Z), click **Close** in the "Build database links to Voyager" box.

**Prepackaged Reports are now successfully linked!**  
**You may now run queries and reports against the database.**

# Appendix A

CARLI REV 7/5/2016

<b>LIBRARY</b>	<b>CODE</b>
Adler University	ADL
Augustana College	AUG
Aurora University	ARU
Benedictine University	BEN
Black Hawk College	BHC
Bradley University	BRA
Carl Sandburg College	CSC
Catholic Theological Union	CTU
Chicago State University	CSU
College of DuPage	COD
Columbia College	COL
Concordia University Chicago	CON
Danville Area Community College	DAC
DePaul University	DPU
Dominican University	DOM
Eastern Illinois University	EIU
Elmhurst College	ELM
Eureka College	ERK
Governors State University	GSU
Greenville College	GRN
Harper College	WRH
Heartland Community College	HRT
Illinois Central College	ICC
Illinois College	ILC
Illinois Eastern Community Colleges	IEC
Illinois Institute of Technology	IIT
Illinois Math & Science Academy	IMS
Illinois State Library	ISL
Illinois State University	ISU
Illinois Valley Community College	IVC
Illinois Wesleyan University	IWU
JKM Library	JKM
John Wood Community College	JWC
Joliet Junior College	JOL
Judson University	JUD
Kankakee Community College	KCC
Kishwaukee College	KIS
Knox College	KNX
Lake Forest College	LFC
Lewis & Clark Community College	LAC
Lewis University	LEW
Lincoln Christian College & Seminary	LCC
Lincoln College	LNC

<b>LIBRARY</b>	<b>CODE</b>
Lincoln Land Community College	LLC
MacMurray College	MMC
McKendree University	MCK
Meadville Lombard Seminary	MLS
Millikin University	MIL
Monmouth College	MON
Morton College	MRT
National-Louis University	NLU
The Newberry Library	NBY
North Central College	NCC
North Park University	NPU
Northeastern Illinois University	NEI
Northern Illinois University	NIU
Northern Seminary	NBT
Oakton Community College	OAK
Olivet Nazarene University	ONU
Parkland College	PRK
Principia College	PRC
Quincy University	QCY
Richland Community College	RCC
Robert Morris University	RMC
Roosevelt University	ROU
Rush University	RSH
Saint Francis Medical Ctr College of Nursing	SFM
Saint Xavier University	SXU
Sauk Valley Community College	SVC
School of the Art Institute Chicago	SAI
South Suburban College	SSC
Southeastern Illinois College	SEI
Southern Illinois University Carbondale	SIC
Southern Illinois University Edwardsville	SIE
Southern Illinois University School of Medicine	SIM
Southwestern Illinois College	SWI
Trinity Christian College	TRN
Trinity International University	TIU
Triton College	TRT
University of Illinois at Chicago	UIC
University of Illinois at Springfield	UIS
University of Illinois at Urbana-Champaign	UIU
University of Saint Francis	USF
University of St. Mary of the Lake	SML
Western Illinois University	WIU
Wheaton College	WHE

## **Appendix B**

### ***Known Issues for 64-bit Windows and Office***

Unable to locate either Microsoft ODBC for Oracle or eisreport DSN on 64-bit Windows

You must use the 32-bit ODBC drivers in order to find the "Microsoft ODBC for Oracle" driver needed during configuration of your ODBC connection in Section IV, steps 16-21 of the CARLI I-Share Oracle 10g/ODBC New Installation Guide. The 32-bit version of the Microsoft ODBC Administrator can usually be found at C:\Windows\SysWOW64\odbcad32.exe.

To access the 32-bit drivers perform the following in place of step 16.

16a. Open the Windows file explorer and navigate to the C:\Windows\SysWOW64 folder. Locate the odbcad32.exe file. Right-click it and select "Run as Admin".

Return to step 17 above and continue with the directions as normal.

64-bit versions of Microsoft Office

64-bit Microsoft Office installed on 64-bit Windows 7 will not work with Oracle/ODBC for reporting against Voyager. Ex Libris only supports an installation using Oracle 10g clients and 32-bit Microsoft Access.

If your institution has the ability to support later versions of the Oracle ODBC clients, then you may be able to use 64-bit Access with Voyager. CARLI may not be able to provide troubleshooting on installation for this configuration.

Microsoft Office 365

At this writing, neither Ex Libris nor CARLI support the use of Microsoft Office 365 with ODBC or Voyager.

## **CARLI Revision History**

Current revision: 8/9/2016

7/18/2016

4/30/2013

7/20/2011

6/23/2010