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 <u>https://www.carli.illinois.edu/products-services/i-share/execute</u>: 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 <u>already completely installed Oracle 10g and ODBC on your PC</u> <u>according to the CARLI specifications</u>. If you have not, please see the Installation instructions at <u>http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/newinstall_10g.pdf</u>.

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

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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.

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Get External Data - ODBC Database	?×
Select the source and destination of the data	
 Specify how and where you want to store the data in the current database. Inport the source data into a new table in the current database. If the specified object does not exist, Access will create it. If the specified object already exists, Access will append a number to the name of the imported object. Channes made to source objects (including data in tables) will not be reflected in the current database. Ink to the data source by creating a linked table. Access will create a table that will maintain a link to the source data. Changes made to the data in Access will be reflected in the source and vice versa. 	ŗ
OK Cancel	

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

Select Data Sou	ırce			? 🛛
File Data Source	Machine Data	Source		1
Data Source I dBASE Files eisreport Excel Files	Name	Type User System User	Description Voyager Production	Reporting
MS Access Da	atabase	User		
				<u>N</u> ew
A Machine Da "User" data s sources can b	ata Source is spe ources are speci be used by all use	ecific to thi fic to a use ers on this	s machine, and canno er on this machine. "S machine, or by a syste	t be shared. iystem'' data em-wide service.
			OK Cano	cel Help

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.

Microsoft ODBC		
User Name:		ОК
Password:		Cancel
Server:	VGER	Help

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

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

Link Tables	? 🛛
Tables	1
ALL ALL TABLES	ОК
ALL_ARGUMENTS	
ALL_CATALOG	Cancel
ALL COL COMMENTS	Select All
ALL COL PRIVS	
ALL_COL_PRIVS_MADE	Deselect All
ALL_COL_PRIVS_RECD	
ALL_COLL_TYPES	
ALL_CONS_COLUMNS	
ALL_CONSTRAINTS	Save password

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



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c. Double-click Build database links to Voyager



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

ODBC Name	eisreport
Connect String	VGER
DB User ID	<your oracle<="" th=""></your>
(remove dbread)	Username>
Password	<your oracle<="" th=""></your>
(remove existing *s)	Password>
Tablespace***	XXXDB
Relink checkbox	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"

Ca	🚽 L) = (L =) =	CARLI_	reports : Database	(Access	2000 file format)	- Microsoft Access	5	-		x
	Home Create	External Data	atabase Tools							0
Saved Imports	Access K Excel SharePoint List	> Text File >™ XML File → More →	Excel	€ st → ⊪→	Create Manage E-mail Replies	Work Synchronize	Discard Changes - Cache List Data	Move to SharePoint		
	Import	ODB <u>C</u> Data	base Export		Collect Data		SharePoint Lists			
Querie	25	Database, s	nk to an ODBC uch as SQL Server.							
	Date Modified: 7/29/2	002 6:2 HTML Docu	ment							
	Busy Times at a Circ I	Document	nk to an HTML							
	Date Created: 6/8/200 Date Modified: 6/8/20 Counts charges and r	6 4:0318 Outlook Fol	l der nk to an Outlook							
	Circulation Stat 1: Cir	culation dBASE File								
	Date Created: 6/8/200 Date Modified: 6/8/20	6 dB 718 PImport or lin 06 4:03:18 PM	nk to a dBASE file							
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	Circulation Stat 2: Cir	tu ₽x 36 Import or lin file	nk to a Paradox							
	Date Created: 6/8/200	6 4:03:18 PM	File							
Ready		123 Import a Lo	tus 1-2-3 file					Num I	Lock	

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

Get External Data - ODBC Database	? 🗙
Select the source and destination of the data	
 Specify how and where you want to store the data in the current database. Inport the source data into a new table in the current database. If the specified object does not exist, Access will create it. If the specified object already exists, Access will append a number to name of the imported object. Changes made to source objects (including data in tables) will not be reflected in the current database. Ink to the data source by creating a linked table. Access will create a table that will maintain a link to the source data. Changes made to the data in Access will be reflected in the source and vice versa. 	i the lase
ОК Салс	:el

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

Se	ect Data Source			? 🗙		
F	le Data Source Machine Data	Source				
	Data Source Name dBASE Files eisreport Excel Files MS Access Database	Type User System User User	Description Voyager Production Reporting			
<u>N</u> ew A Machine Data Source is specific to this machine, and cannot be shared. "User" data sources are specific to a user on this machine. "System" data sources can be used by all users on this machine, or by a system-wide service.						
_			OK Cancel	Help		

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.

Microsoft ODBC	X	
User Name:		ОК
Password:		Cancel
Server:	VGER	Help

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

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

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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



g. Double-click Build database links to Voyager



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

ODBC Name	eisreport
Connect String	VGER
DB User ID (remove dbread)	<your oracle<br="">Username></your>
Password (remove existing *s)	<your oracle<br="">Password></your>
Tablespace***	XXXdb
Relink checkbox	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

4	2 Mio	crosoft	Acce	SS						
ł	Eile	<u>E</u> dit	⊻iew	Insert	<u>T</u> ools	<u>W</u> indow	Help	Ado <u>b</u> e PDF		
		<u>N</u> ew				C	Itrl+N			
Ì	2	Open				C	itrl+0	🖳 + 📇 + 🎘 🐽 🔗 :		
		<u>G</u> et Ext	ernal D	ata)	· 🏅 Import		
		<u>⊂</u> lose						📲 Link Tables		
		Cours					- Felix C			

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:

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Link											×
Look in:	😼 My Comp	uter		*	۵ -	· 📬	Q,	×	• ## •	Tools 🗸	
	Subset of the second secon	C:)									
My Recent Documents	100 ORCL9201	_1 (E:)									
Desktop											
My Documents											
My Computer											
	File name:										 _
My Network Places	Files of type:	Microso	ft Office A	ccess (*.m	db;*.m	da;*.m	de)		~		
		HTML D	ocuments (*.html;*.h	itm)				^		_/
		Paradox Text File Window	k (*.db) es (*.txt;*. Is SharePoi	.csv;*.tab nt Service	;*.asc) s ()						
		ODBC D	atabases ()	- V				× •		

- 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

Data Source Name	Туре	Description	
dBASE Files	User		
dBase Files · Word	User		
DeluxeCD	User		
eisreport	System	Voyager Production Reporting	
eistrain 🗟	System	Voyager Primary Training Database	s
eistrainalt	System	Voyager Alternate Training Databa:	ses
Excel Files	User		
FoxPro Files - Word	User		
Mais	Hser	SQL Server	ъĒ
			<u> </u>
		New	
		<u></u>	
A Machine Data Source is	s specific to thi	s machine, and cannot be shared.	
	pecific to a us	er on this machine. "System" data	
User" data sources are s	Il users on this	machine, or by a system-wide service	e.
"User" data sources are s sources can be used by a			
"User" data sources are s sources can be used by a			
"User" data sources are s sources can be used by a			

- 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.

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Microsoft ODB	C for Oracle Connect	×
User Name:		OK
Password:		Cancel
Server:		Help

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

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

Tables	
ALL ALL TABLES ALL_ARGUMENTS ALL_CATALOG ALL_CLUSTER_HASH_EXPRESSIONS ALL_CLUSTERS ALL_COL_COMMENTS ALL_COL_COMMENTS	OK Cancel Select All
ALL_COL_PRIVS_MADE ALL_COL_PRIVS_MADE ALL_COL_PRIVS_RECD ALL_COLL_TYPE5	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:

ODBC Name	eisreport
Connect String	VGER
DB User ID (remove dbread)	<your oracle<br="">Username></your>

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Password (remove existing *s)	<your oracle<br="">Password></your>
Tablespace***	XXXdb
Relink checkbox	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					
LIBRARY	CODE	LIBRARY	CODE		
Adler University	ADL	Lincoln Land Community College	LLC		
Augustana College	AUG	MacMurray College	MMC		
Aurora University	ARU	McKendree University	MCK		
Benedictine University	BEN	Meadville Lombard Seminary	MLS		
Black Hawk College	BHC	Millikin University	MIL		
Bradley University	BRA	Monmouth College	MON		
Carl Sandburg College	CSC	Morton College	MRT		
Catholic Theological Union	CTU	National-Louis University	NLU		
Chicago State University	CSU	The Newberry Library	NBY		
College of DuPage	COD	North Central College	NCC		
Columbia College	COL	North Park University	NPU		
Concordia University Chicago	CON	Northeastern Illinois University	NEI		
Danville Area Community College	DAC	Northern Illinois University	NIU		
DePaul University	DPU	Northern Seminary	NBT		
Dominican University	DOM	Oakton Community College	OAK		
Eastern Illinois University	EIU	Olivet Nazarene University	ONU		
Elmhurst College	ELM	Parkland College	PRK		
Eureka College	ERK	Principia College	PRC		
Governors State University	GSU	Quincy University	QCY		
Greenville College	GRN	Richland Community College	RCC		
Harper College	WRH	Robert Morris University	RMC		
Heartland Community College	HRT	Roosevelt University	ROU		
Illinois Central College	ICC	Rush University	RSH		
Illinois College	ILC	Saint Francis Medical Ctr College of Nursing	SFM		
Illinois Eastern Community Colleges	IEC	Saint Xavier University	SXU		
Illinois Institute of Technology	IIT	Sauk Valley Community College	SVC		
Illinois Math & Science Academy	IMS	School of the Art Institute Chicago	SAI		
Illinois State Library	ISL	South Suburban College	SSC		
Illinois State University	ISU	Southeastern Illinois College	SEI		
Illinois Valley Community College	IVC	Southern Illinois University Carbondale	SIC		
Illinois Wesleyan University	IWU	Southern Illinois University Edwardsville	SIE		
JKM Library	JKM	Southern Illinois University School of Medicine	SIM		
John Wood Community College	JMC	Southwestern Illinois College	SWI		
Joliet Junior College	JOL	Trinity Christian College	TRN		
Judson University	JUD	Trinity International University	TIU		
Kankakee Community College	KCC	Triton College	TRT		
Kishwaukee College	KIS	University of Illinois at Chicago	UIC		
Knox College	KNX	University of Illinois at Springfield	UIS		
Lake Forest College	LFC	University of Illinois at Urbana-Champaign	UIU		
Lewis & Clark Community College	LAC	University of Saint Francis	USF		
Lewis University	LEW	University of St. Mary of the Lake	SML		
Lincoln Christian College & Seminary	LCC	Western Illinois University	WIU		
Lincoln College	LNC	Wheaton College	WHE		

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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