Using Microsoft Access for Reporting

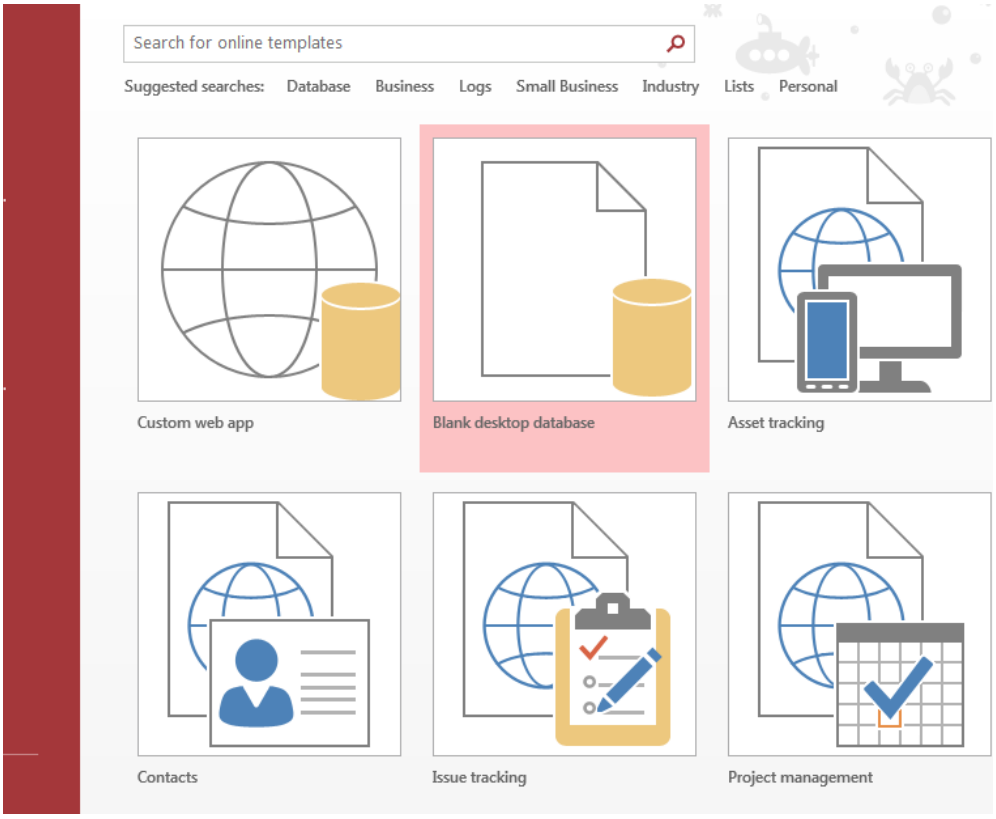
Microsoft Access can be used to access the underlying data in Provide® Enterprise. Once you have linked to the underlying data, you can create specific reports using Access.

NOTE: This chapter is meant only to show you the steps to link to the data in Provide® Enterprise using Access. It assumes that you have a basic understanding of how to use Access.

Linking to Provide® Enterprise Data from within Access

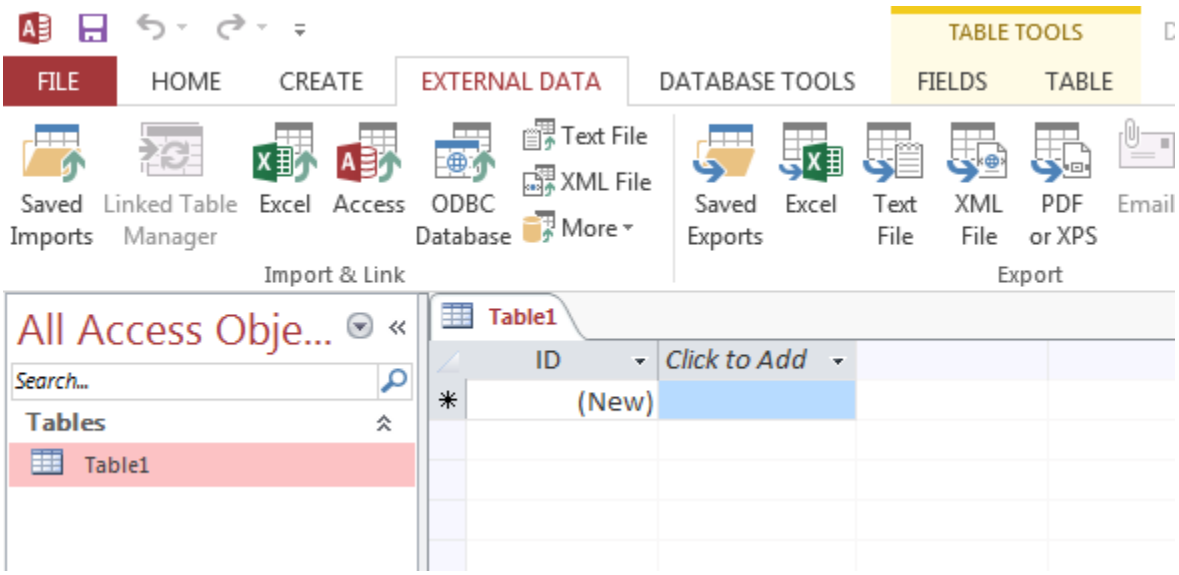
To create a link to the Provide® Enterprise database from within Microsoft Access, follow the steps below:

- Open Microsoft Access. Select "Blank Desktop Database"



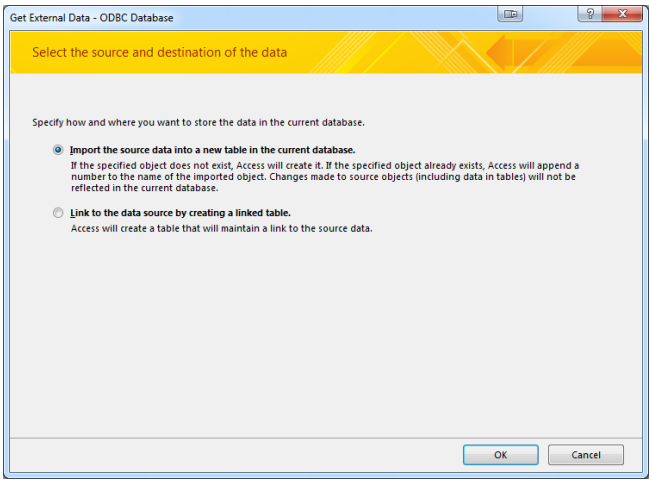
- Your database will be opened.

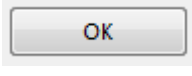
- Click on the EXTERNAL DATA data window at the top of the screen. The toolbar will expand and look similar to that below.



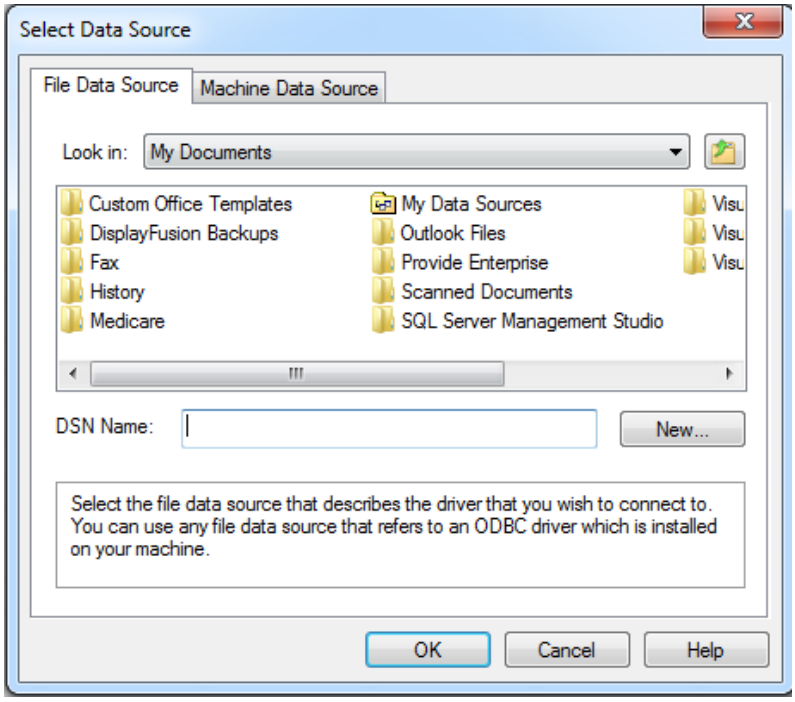
- Select

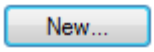
.
- A dialog box similar to that below will open.



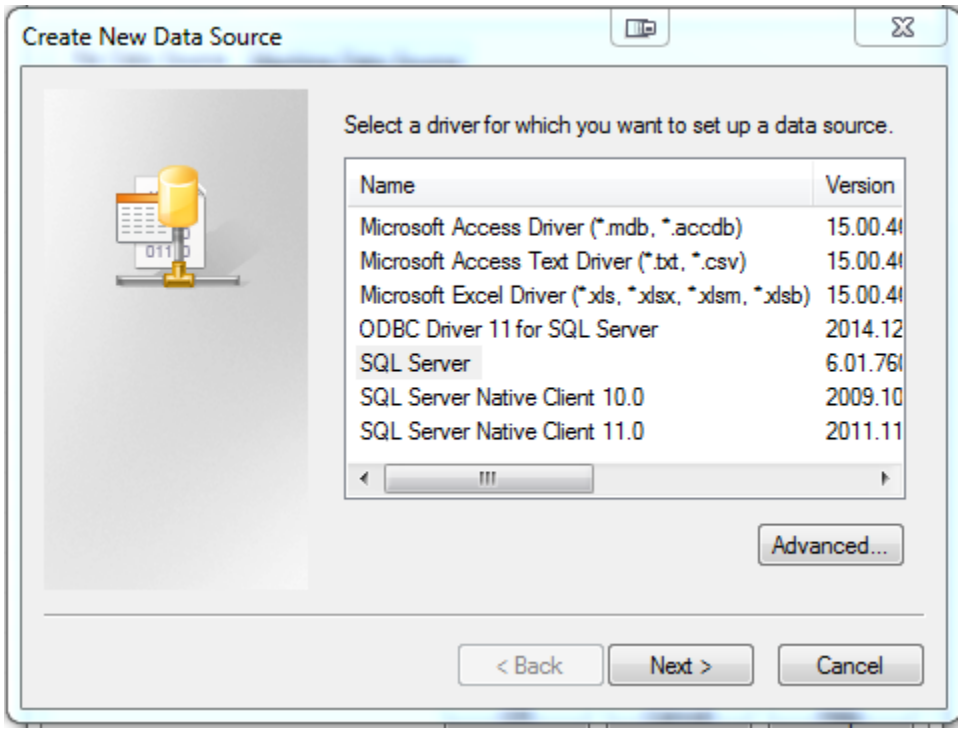
- Select "Link to the data source by creating a linked table"and click the 

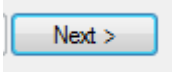
button to continue.
- The Select Data Source dialog will appear.



- Click the 

button to create the new connection.
- The dialog below will appear:

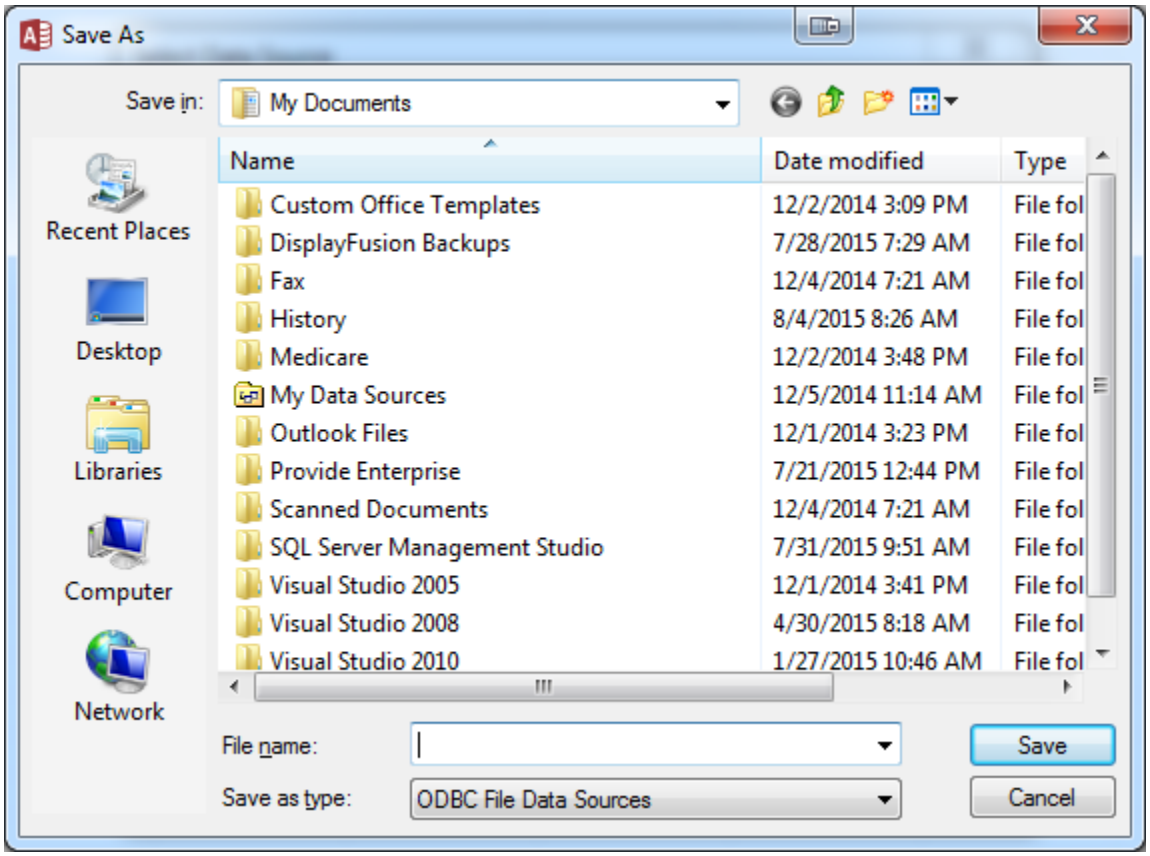


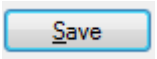
- Select “SQL Server” and then click the 

button to continue.

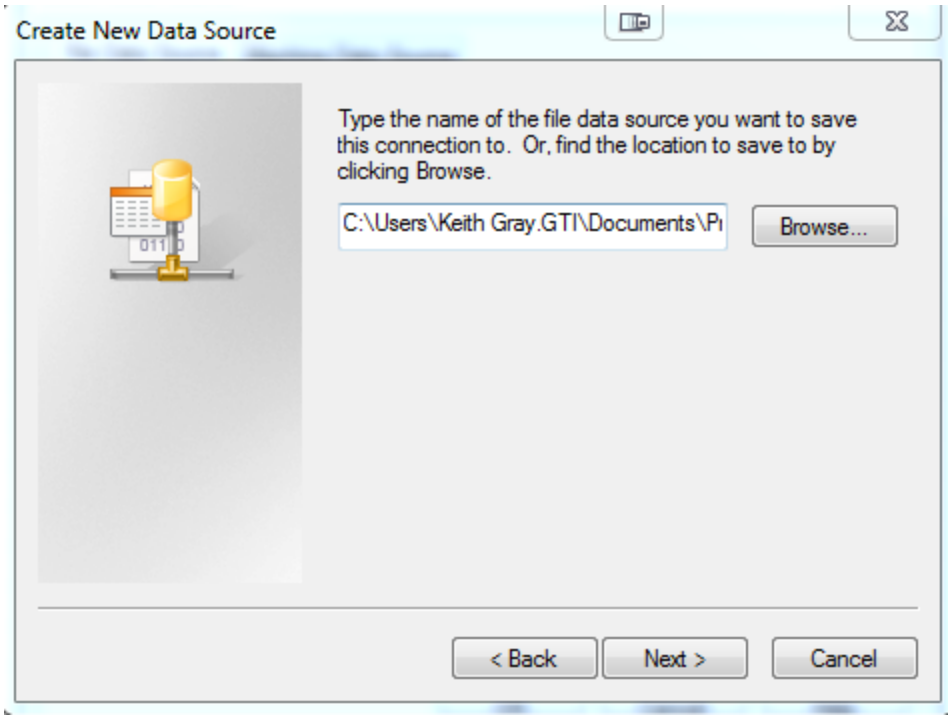
- Next, you will be able to save your connection. Click the

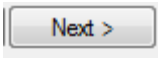
button to look for the location where you want to save the connection.
- You will get the “Save As” Dialog similar to that below.

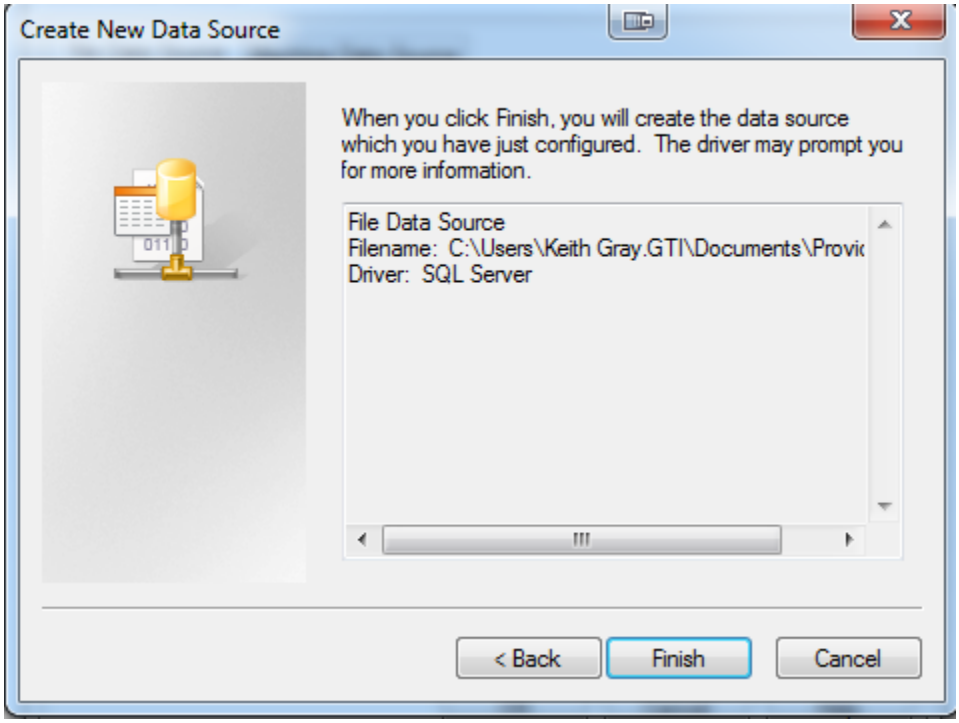


- Type in the name that you want to give your database and then click on the 

button. You path will appear in the Create New Data Source Window.

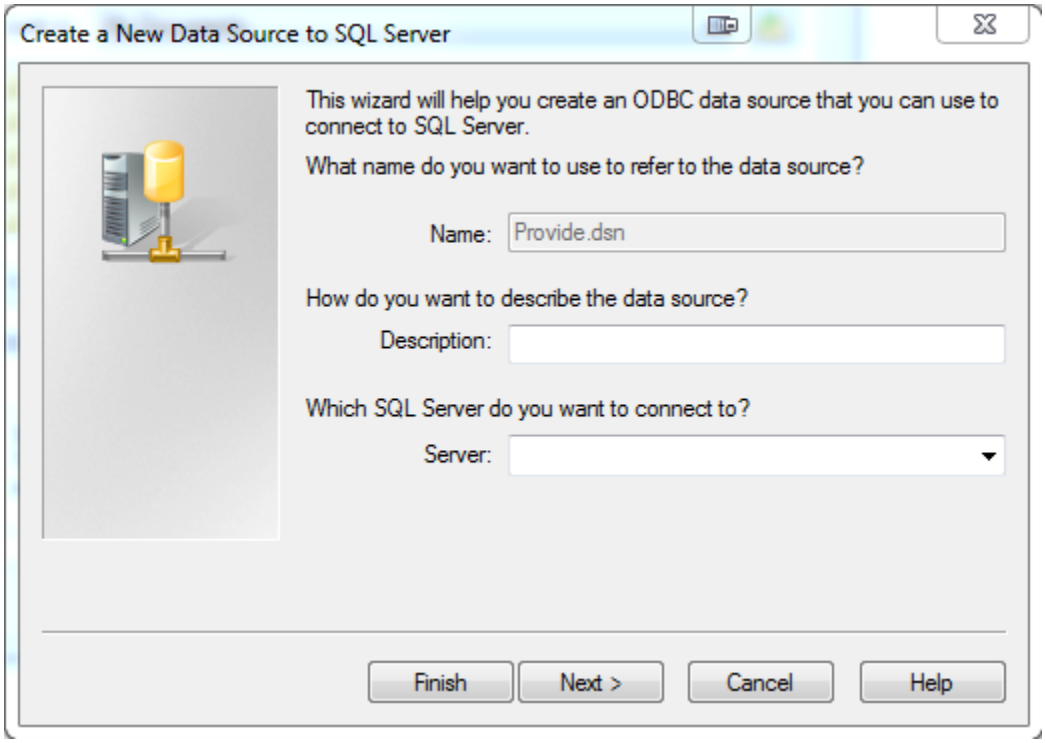


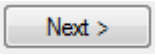
- Click the  to continue.



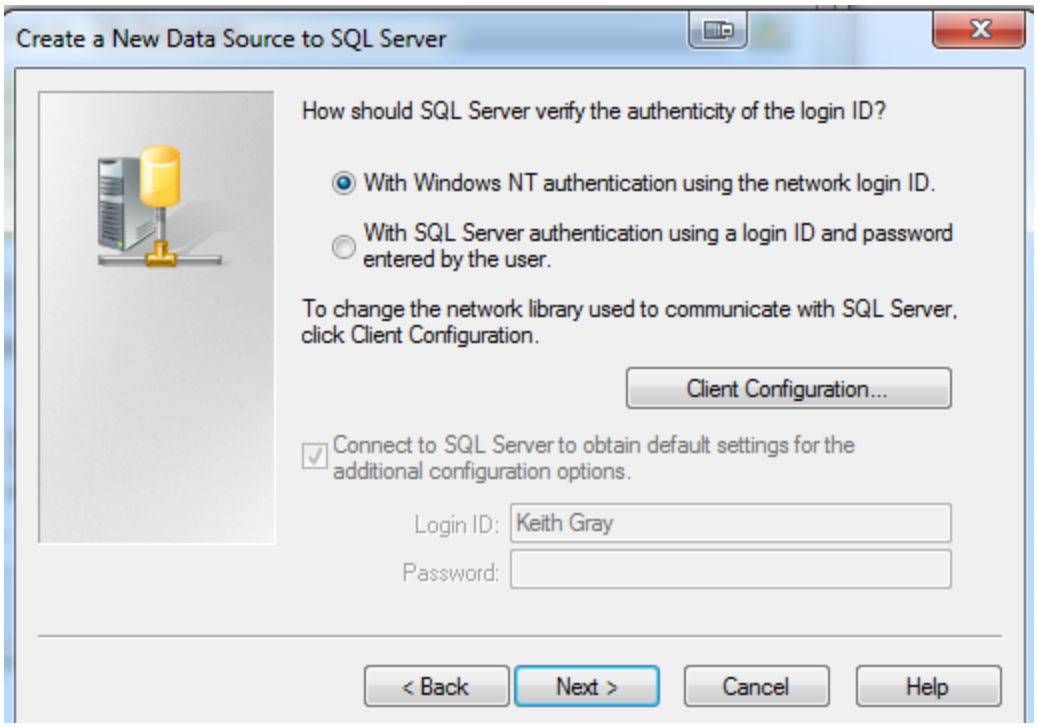
- Next, click the button.

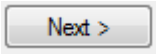
- The New Data Source Connection tool will continue to help you create the link to the Provide® Enterprise SQL database.



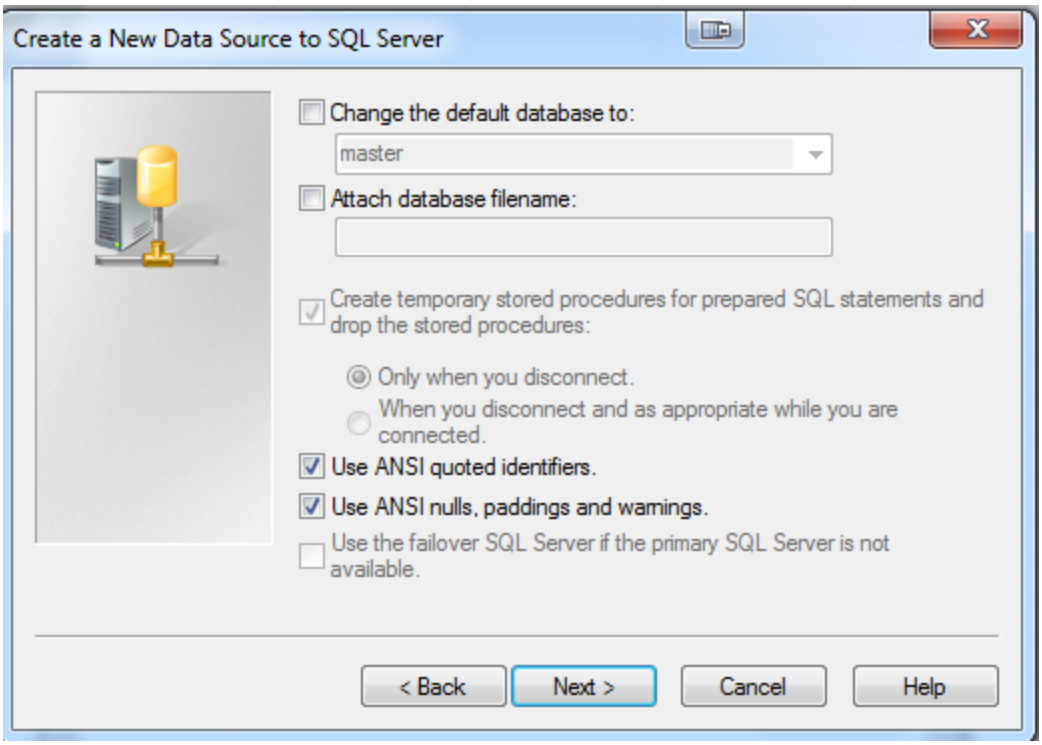
- If you want to enter a "Description" feel free.
- In the "Server" field, type in the name of the server (Server Name from your Provide® Enterprise Login Screen) that you use to log into Provide Enterprise.
- Click the 

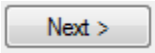
button to continue. The Wizard will continue and will look similar to that below.

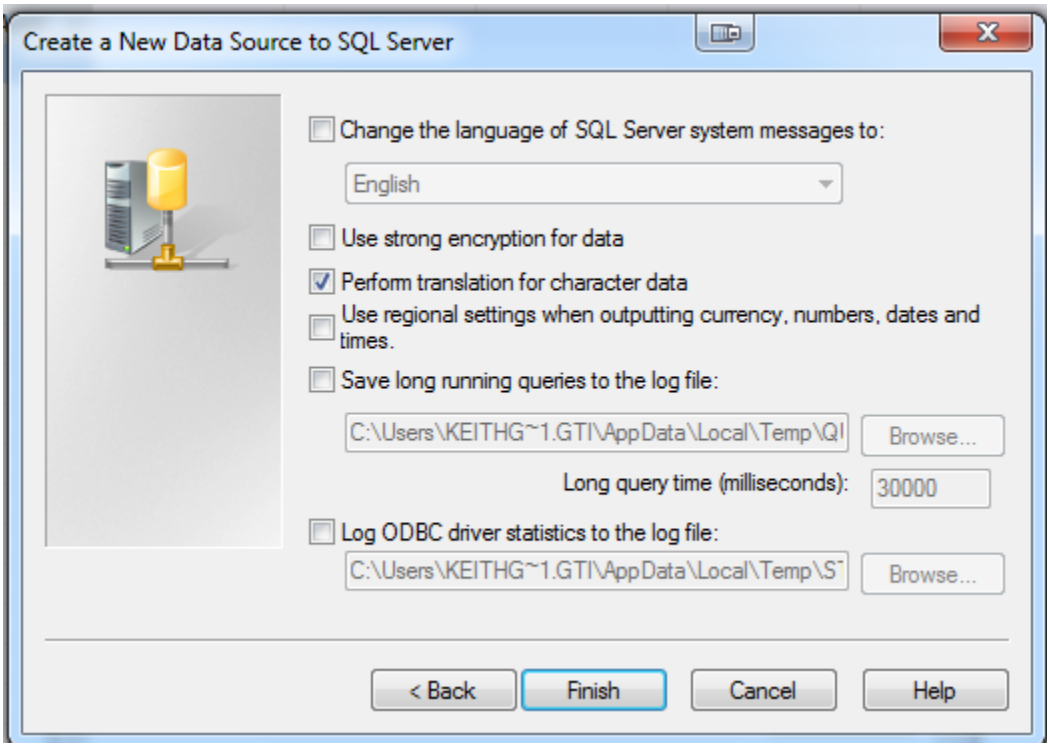


- In the "How should SQL Server verify the authenticity of the login ID?" field, select "With SQL Server authentication using a login ID and password entered by the user"
- Enter your Provide® Enterprise Login ID and Password in the Login ID and Password Field. Enter these exactly as you enter them in the Provide® Enterprise login screen. Then, click on the 

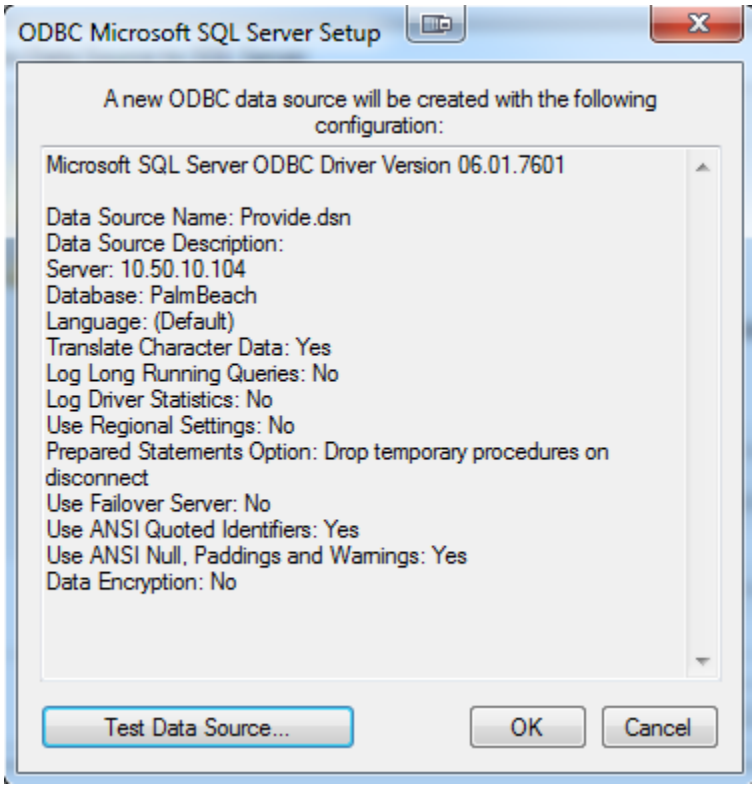
button.
- The following dialog box will appear:



- The only setting that you need to change here is to select "Change the default database to" field and enter (or pick) your database name in the field. This is the "Database" listed in your Provide® Enterprise Login Screen.
- Click on the  button to continue to the next screen, seen below:



- You do not need to change any settings in this dialog box, so click on the Finish button. You will be brought to a verification window, similar to the one in the figure below.

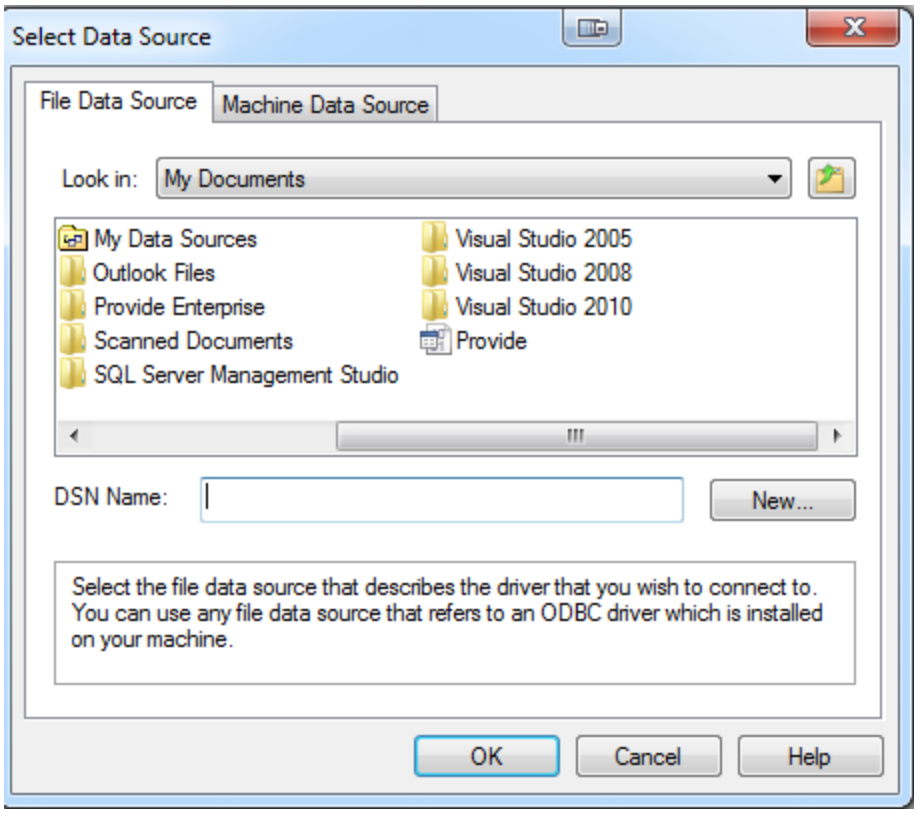


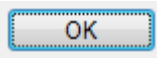
- Click on Test Data Source... button to check your connection. Depending on the speed of your connection to the SQL server, this may take a few seconds. If the connection is fine, you will see a dialog box similar to that in the figure below appear:

- Click on the OK button to continue.

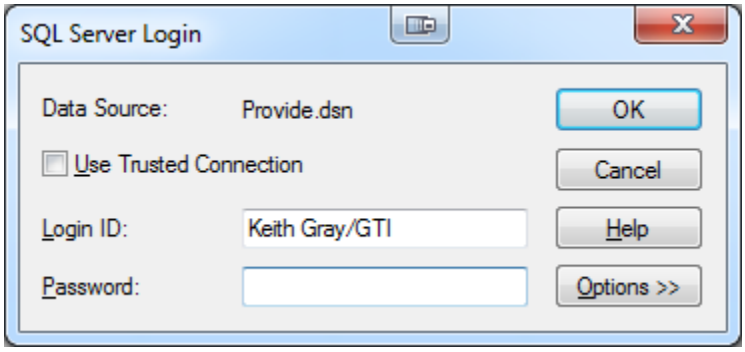
- NOTE: If you receive a message that your Connection test failed, click on the OK button, then click on the Cancel button to return to the previous dialogs. Use the < Back button to return to the beginning of setting up your connection and verify all of your settings are entered as suggested in this guide. Once you have established a connection and your test has completed successfully, you can continue.

- When your test has completed successfully, click on the OK button twice and you will be brought back to the dialog box seen in the figure below:



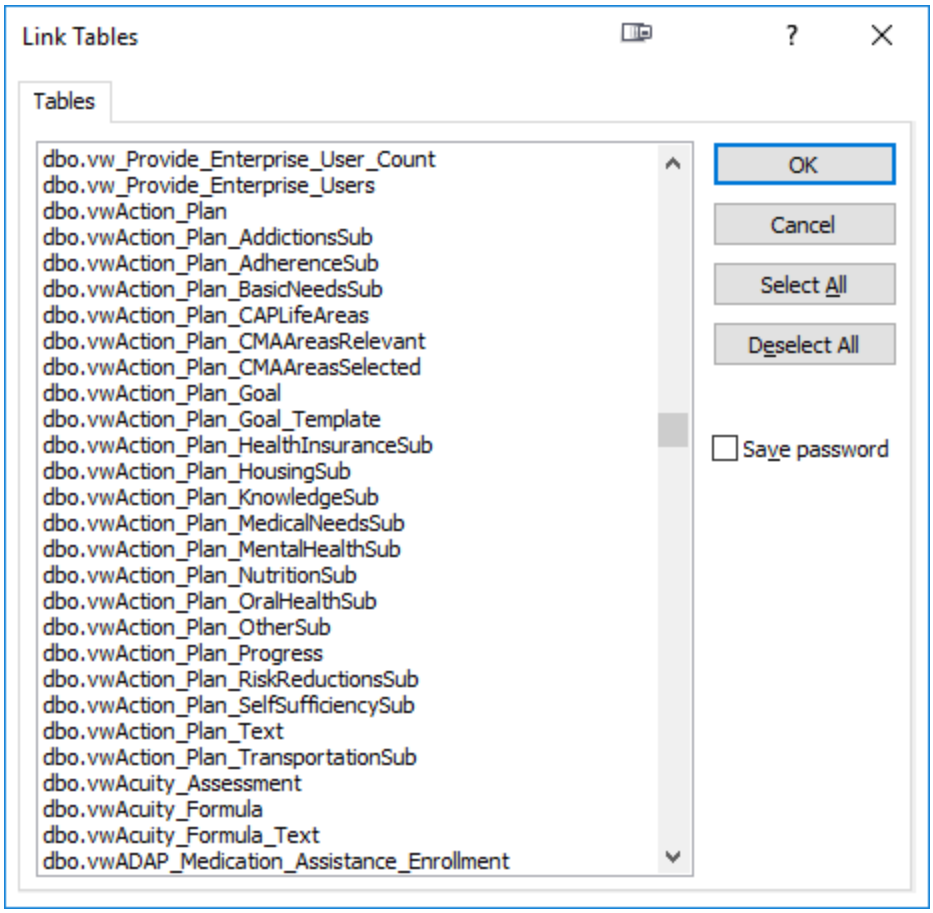
- Single click on the data source you created and then click on the 

button.
- You will be prompted for your Login ID and password by a dialog box similar to the one below.

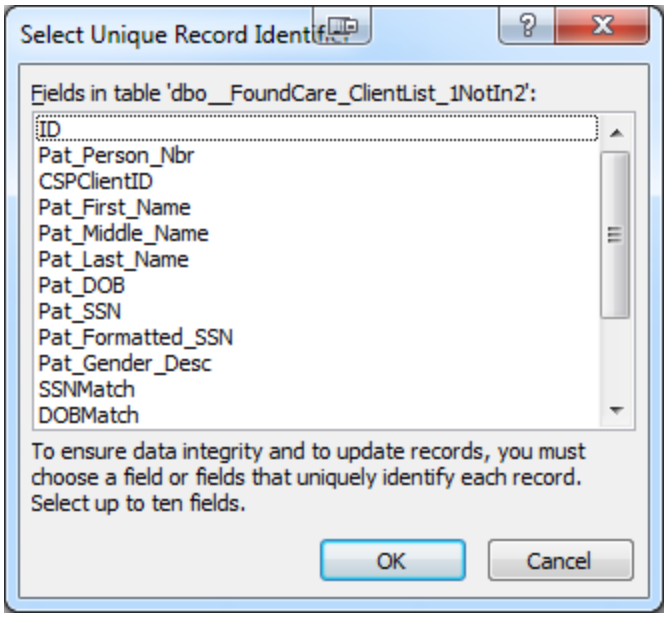


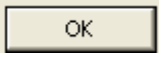
- Enter your Login ID and Password and then click on the

button to continue.
- The “Link Tables” dialog box, similar to that in the figure below will appear on your screen:



- Select all of the “tables” you want to link in to your Access database to work with. NOTE: You will not have access to any of the “tables” that start with tbl. You will only have access to the data in the associated views (starting with vw). Scroll down the list to the choices starting with vw.
- If you are planning on working with data from all tables at one time or another, click on the Select All button. Otherwise, simply single click on the “tables” you want to utilize and then click on the OK button. For each “table” you selected, you will be asked to select the Unique Record Identifier. (With a dialog box similar to that in the figure below):



- Select "SQLID" for each of these and then click on the 

button. Once you have selected the Unique Identifier for each "table" that you selected.
- Once this has been done, you can start using Access to build Queries or to build Reports. Please see Microsoft Access documentation for information on doing this. NOTE: Reference the Provide Enterprise Reporting Basics User guide for details on linking the various databases (tables) together.