



Secure Perfect and Microsoft Access 2002

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NOTE



If you possess a previous version of this document, you may notice changes since the last publication, marked by a change bar which is a vertical line in the margin that visually identifies significant new or revised material.

Overview

This document details the advanced procedures for creating database projects in Access 2002 and connecting to Secure Perfect databases. This process is used solely for writing custom reports.

Addition of New SQL Login

During the Secure Perfect installation process of creating a database, a new SQL **exreport** login is created with a password of **exreport**, whether this is a first-time installation or upgrade from SP3.1.

The **exreport** login has Read permission only to the three Secure Perfect databases. This is the login that must be used to connect to the Secure Perfect databases when creating Microsoft Access 2002 projects.

Connecting an Access 2002 Project with Secure Perfect Databases

NOTE



Access 2002 can be installed on the SP Server computer and/or any SP client.

In order to view a database scheme, a project must be created in Access 2002 for each of the three databases in Secure Perfect:

- **SecurePerfect**
- **SecurePerfectArchive**
- **SecurePerfectHistory**

Begin by creating the **SecurePerfect** project and storing the project in the **Database** folder. When Secure Perfect was installed, a **Database** folder was created in the **Secure Perfect** folder.

Creating a Project for SecurePerfect in Access 2002

► To create a new SecurePerfect project in Access 2002:

1. From the **File** menu of Access 2002, select **New**, then **Project (Existing Database)**.
2. Click **OK**.

Result: A **File New Database, Save In** dialog box displays.

3. Name your project **SecurePerfect.adp** and save in the program folder, **Program Files/Casi-Rusco/Secure Perfect/Database**. Click **Create**.

Result: The **Connection** tab of a **Data Link Properties** dialog box displays, enabling you to link the newly created Access project to an MSDE or SQL Server.

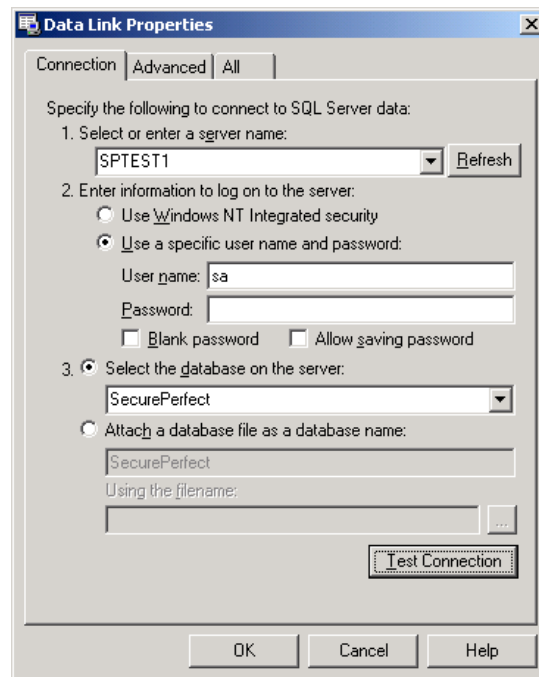


Figure 1. Access 2002 Data Link Properties

Connecting the Access 2002 Project to the Secure Perfect Database

➤ To connect the new project to Secure Perfect:

1. In the **Select or enter a server name** field of the **Data Link Properties, Connection** tab, select your server name from the drop-down list.
2. If you **WILL** be creating reports using Access 2002, in the **Use a specific user name and password** field, enter a **User name** of **exreport**. Enter a **Password** (**exreport** is the default).

If you are **NOT** going to write external reports, you can use any valid SQL login with at least **Read** permission to the Secure Perfect databases.

3. Select **Allow saving password**, if not already selected.
4. In the **Select the database on the server:** field, select **securePerfect** from the drop-down list.
5. Click **Test Connection**.

Result: A **Microsoft Data Link** dialog box will display, informing you the link was successful.

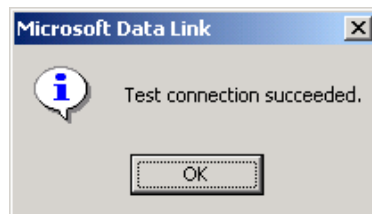


Figure 2. Access Data Link Test Connection Succeeded

If the link was not successful, repeat these steps, verify your settings, and test the connection again.

6. Click **OK**.

Result: A **securePerfect.adp** project is created and a list of the tables will display similar to Figure 3, that was created in Access 2002 to accommodate the Secure Perfect database.

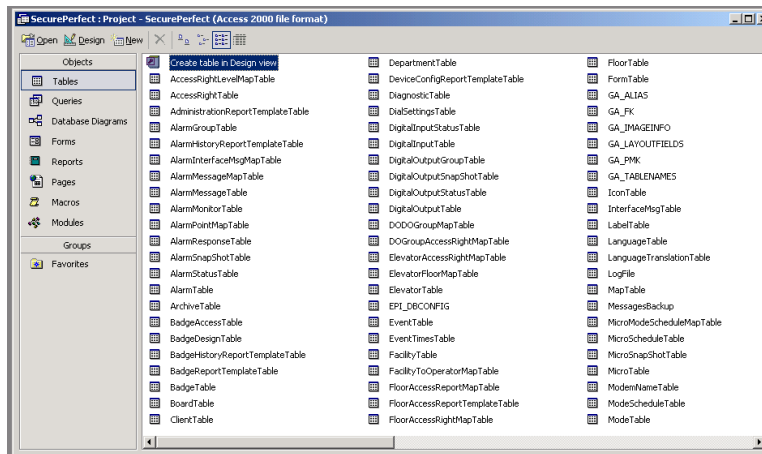


Figure 3. Access SecurePerfect Project Tables

7. If you are required to change or set a password for the **exreport** user of the Secure Perfect database, select **Tools, Security**, then **Set Database Password**.

Result: A **Change Password** dialog box displays.

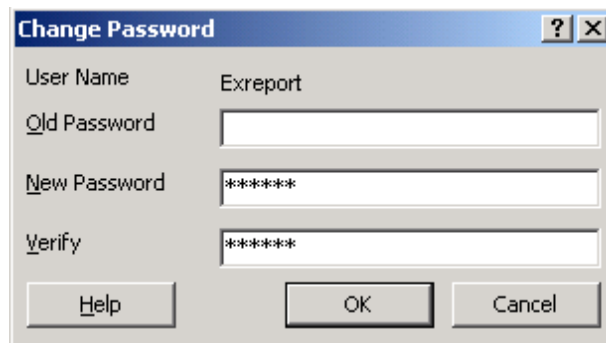


Figure 4. Access Change Database Password

8. Enter a **New Password** for user **exreport**. Then, enter again in the **Verify** field and click **OK**.

NOTE

In future attempts to open the database file in Access 2002, a password must be entered.



Creating Projects for SP SecurePerfectHistory and SecurePerfectArchive

➤ To create additional projects:

1. Repeat step 1 (page 3) through step 8 (page 4), to create projects for:
 - **SecurePerfectHistory**
While performing the process, select **SecurePerfectHistory** in step 4.
 - **SecurePerfectArchive**
While performing the process, select **SecurePerfectArchive** in step 4.
2. When you have successfully created and linked the three projects, exit out of Access 2002.

Creating Reports for Access 2002 Projects

➤ To create and link a report to Secure Perfect:

1. Following the creation of each Access 2002 project, create an Access report, using the **Create report by using wizard** utility.

NOTE

The report must be saved on the SP Server computer in the **Externals** folder.



2. If you are saving a report at the Server computer, open the Access project in another window, then open **Windows Explorer** and navigate to the **Casi-Rusco\Secure Perfect\Externals** folder on your SP Server computer.

If you are saving (dragging) a report from a client computer, navigate to the Server computer in **Network Neighborhood**. Locate the **Externals** folder and release (drop) the report shortcut there.

Result: You have created a shortcut between the Access report file and Secure Perfect.

3. Close the Access program.

Launching External Reports from Secure Perfect

1. Within Secure Perfect, select **External Reports** from the **Reports** menu.

Result: The **Launch External Reports** window displays.

2. The **Externals** folder on the Server computer will open, displaying your created reports. Select a report file and click **Open** to preview the report.

NOTES