

# PREPARING ACCESS 2010 OR ACCESS 2007 FOR USE WITH PEARL

**Summary:** All changes **must** be made by an Administrative User. In Windows 7, UAC **must** be turned off to make the changes.

For Pearl to work correctly with Access 2010 or Access 2007, macros must be enabled either globally or at least for the Pearl file via Trusted Locations. Also, you may need to follow additional steps for correct operation of the MSSOAP30.dll file to use Pearl Web Services (eGrant Import and GuideStar Charity Check). If you have Pearl Access User Level Security, you must also reconnect each workstation to the correct Workgroup file to reactivate the separate Pearl logon.

## Basic Setup:

- A. Before You Begin section includes important information.
- B. Windows 7 users **must** turn off UAC to make the changes.
- C. Vista users can proceed directly to the section on enabling macros.
- D. Reconnect Pearl to security file if applicable.
- E. Check code references in Pearl.
- F. Test Pearl functionality with UAC off.
- G. Once Pearl opens correctly, Windows 7 users **must** turn UAC back on.
- H. Test Pearl functionality with UAC back on.

## Troubleshooting:

- I. Optional instructions are available for selectively enabling macros for Trusted Locations is on page 9.
- J. Troubleshooting the Microsoft Office Soap Type Library v3.0 reference starts on page 10.

## BEFORE YOU BEGIN

- **Pearl will not work in Office 2010 64-bit. When installing Office 2010, use the 32-bit installation option (recommended by Microsoft) even on 64-bit Windows.**
- Be sure the latest service pack for Microsoft Office is installed on each workstation BEFORE opening Pearl. Microsoft updates: [update.microsoft.com](http://update.microsoft.com) (as of 10/1/2011: Office 2007 SP-3; Office 2010: SP-1\*)
- Install the latest Pearl update.  
Pearl update: <http://www.bromelkamp.com/Home/Support/SoftwareUpdates/tabid/73/Default.aspx>
- In Office 2010 the round Office button was replaced with the File menu, but the instructions remain the same.
- *In Office 2010, it may be necessary to change default expressions on form controls. If you encounter problems with F2 Find List searches, please call Bromelkamp at (toll-free) 877-767-6703.*
- All changes **must** be made by an Administrative user on the workstation of each Pearl user.

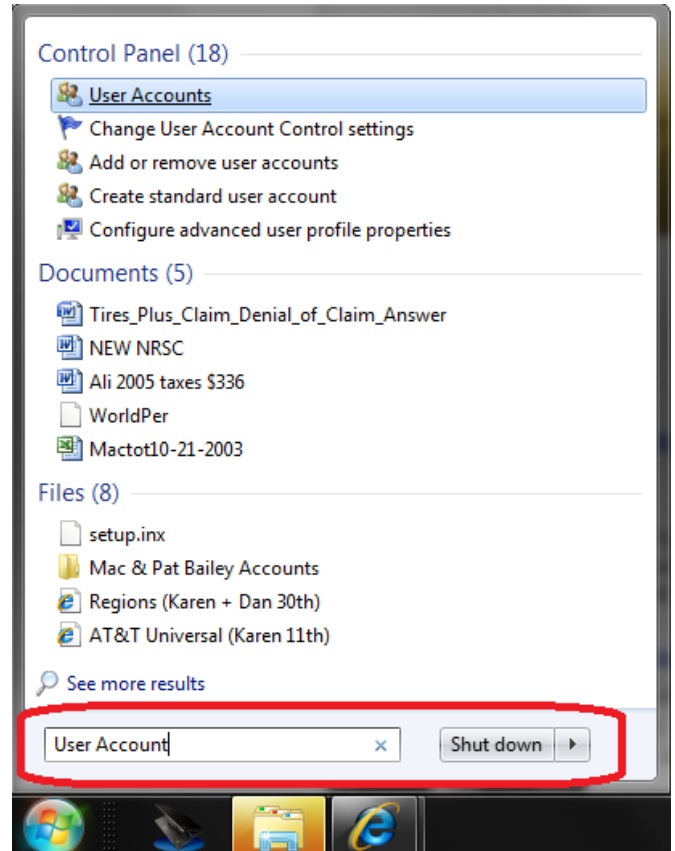
\*Pearl users with custom reports which ask the user to choose a year or run a union query will need additional code fixes due to a bug in Office 2010 SP-1. Please contact Bromelkamp Support at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com) for assistance.

## WINDOWS 7 USERS ONLY - TURN UAC OFF (WINDOWS VISTA USERS CONTINUE TO NEXT SECTION)

The first step for you is to turn off the UAC (User Account Control) setting. It is EXTREMELY important that you remember to turn this back on as soon as you have completed the rest of the steps described in this document. To turn off this control:

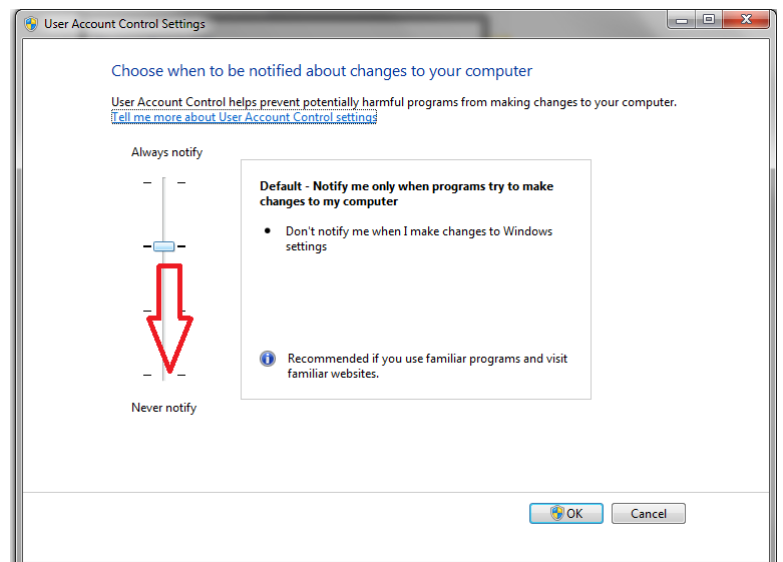


1. Click on the **Start** button in the lower left corner of the start bar on your computer:
2. In the **Search** box, type **User Account**; You should see a list display that looks something like the screen example below.
3. Pick the **Change User Account Control Settings** option



4. Slide the **Notify** button from the mid-position down to the **Never Notify** position. Click the **OK** button.

**5. Reboot your computer. Then continue on with the rest of this document.**

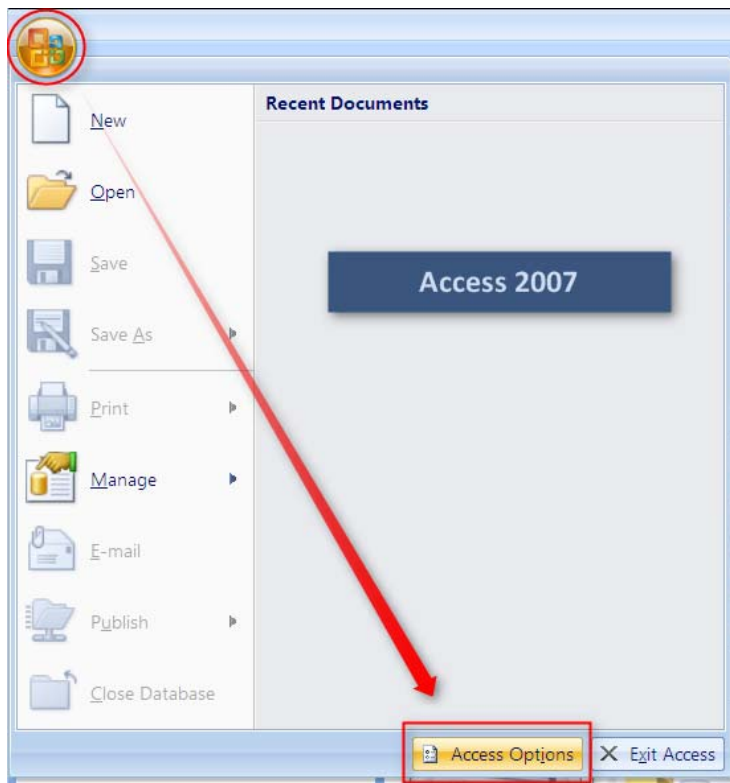


**IMPORTANT:** Later in this document you will be instructed to turn the UAC back on. It is imperative that you do not forget to do this once the following changes have been made.

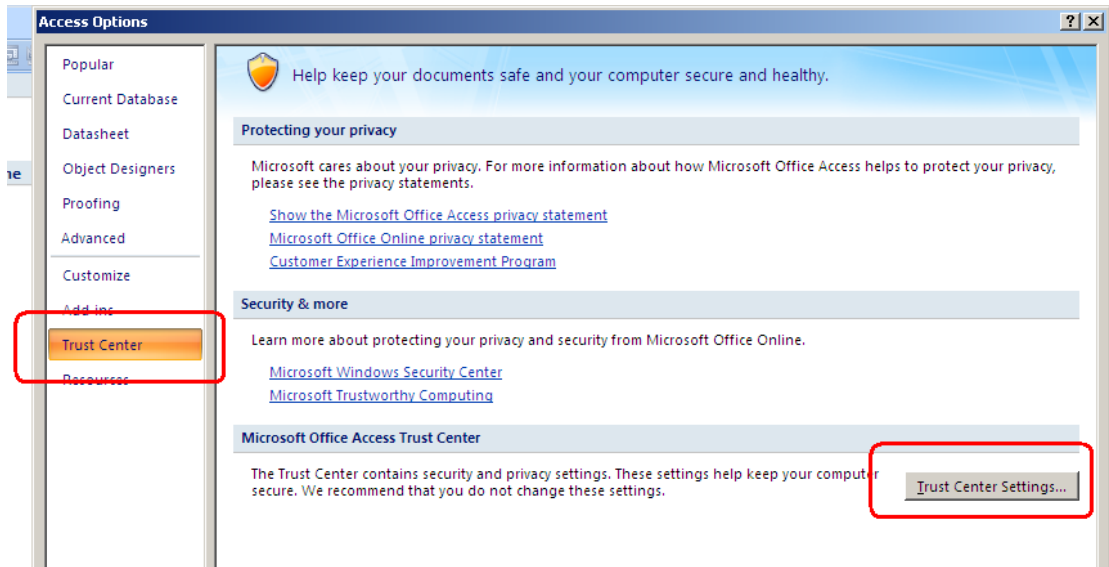
Pearl must run with macros enabled to work properly. Enabling all macros is the simplest method.

*(Please note: If you would prefer to enable macros only for the Pearl database, please see the instructions for Trusted Locations.)*

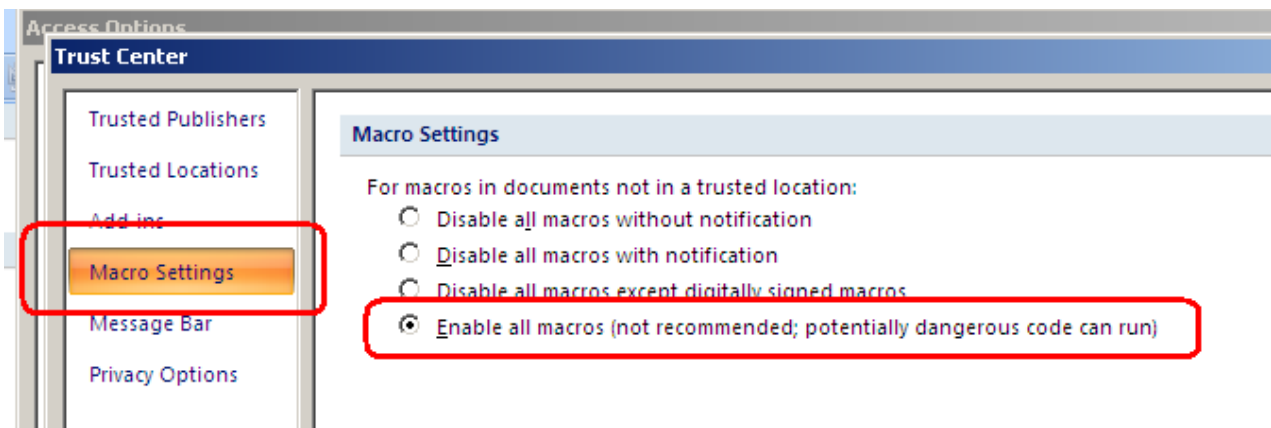
1. Open **Microsoft Access** without opening Pearl.
2. Open **Access Options**
  - a. For Access 2007 - Click on the **Office Button** in the upper left corner, then click on the **Access Options** button.
  - b. For Access 2010 – Click on the **File Tab** on the left side of the screen, then select **Options**.



3. Select **Trust Center** and click on the **Trust Center Settings** button



4. In **Macro Settings**, select 'Enable all macros'



5. Click **OK** twice to close the Trust Center and Access Options menus and save the changes

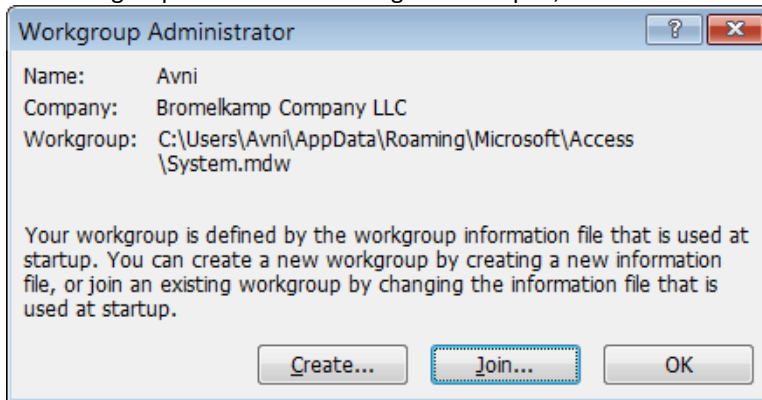
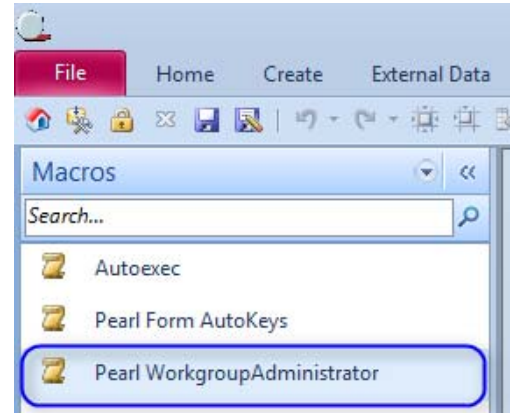
## RECONNECT USERS TO THE WORKGROUP FILE (IF APPLICABLE):

Pearl users will become disconnected from Pearl.mdw any time they open an Access database and the Pearl.mdw file is not available. Common situations include:

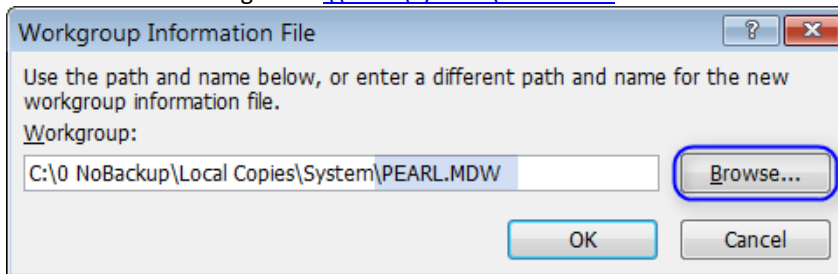
- Working on an off-line copy of Pearl at home over the weekend.
- Changing/installing Windows or Office on the computer.

Steps to reconnect to workgroup for each user:

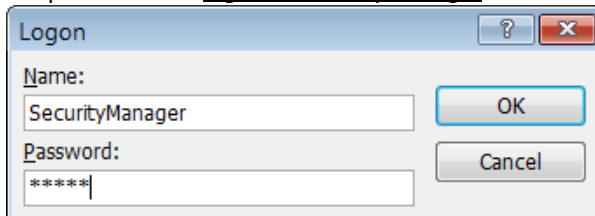
1. Press F11 to reveal the Navigation Pane.
2. Scroll down to the Macros
3. Find the macro Pearl WorkgroupAdministrator. Double-click on it.
4. The Workgroup Administrator dialog box will open, click Join



5. Browse and then navigate to [\\Pearl\System\Pearl.mdw](#). Select Pearl.mdw and click Open.

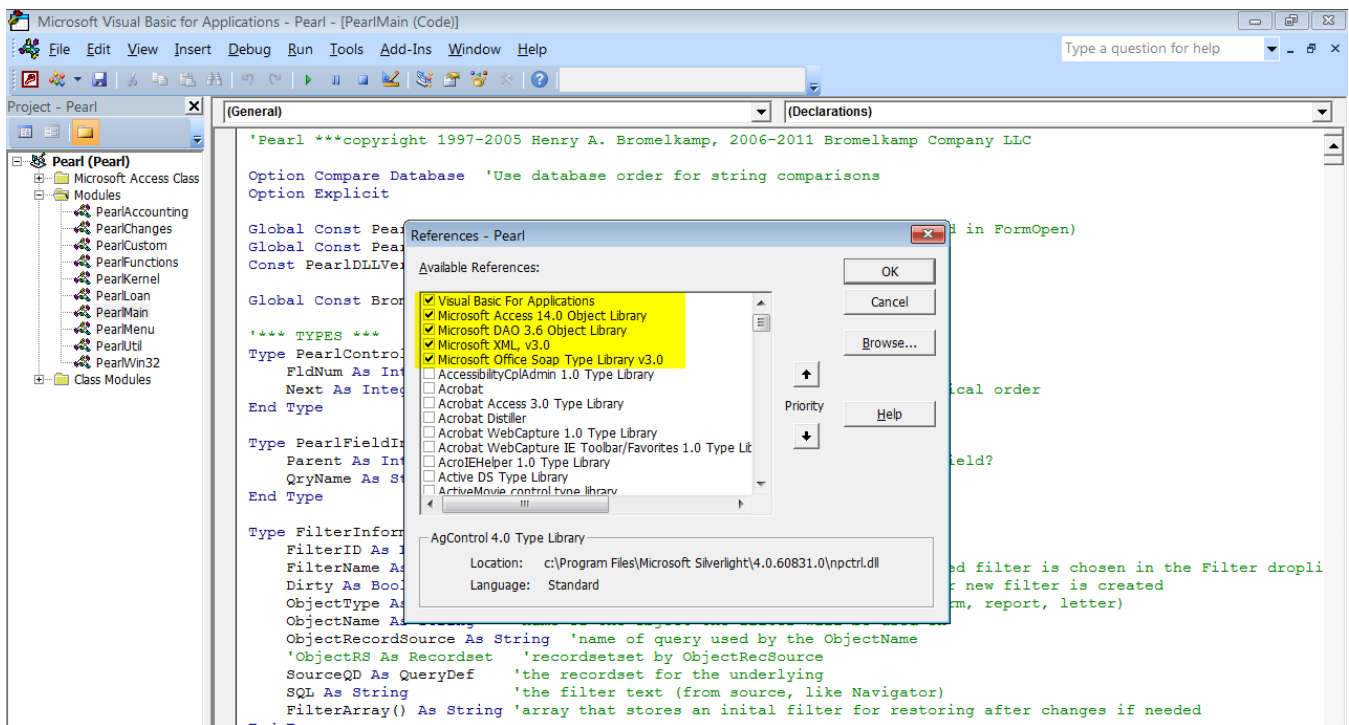


6. Click OK. You should get a message that you have successfully joined the workgroup.
7. Reopen Pearl and log in as SecurityManager so that Pearl can copy necessary files to the workstation.



## CHECK CODE REFERENCES IN PEARL

1. Open Pearl exclusively – you must be the only person in the Pearl Database to make these changes.
2. Press **Ctrl+G** to open the code window.
3. In the **Tools** menu, select **References**.
4. References should include only
  - Visual Basic for Applications.
  - Access 2003 Users: Microsoft Access 11.0 Object Library.
  - Access 2007 Users: Microsoft Access 12.0 Object Library.
  - Access 2010 Users: Microsoft Access 14.0 Object Library.
  - Microsoft DAO 3.6 Object Library.
  - Microsoft XML , v3.0. *It is very important that XML v3.0 be selected and **not** version 2.0. You may need to scroll down the list of references to find Microsoft XML, v3.0.*
  - Microsoft Office Soap Type Library v3.0. *To install this reference, please download and install the latest Pearl update from the Software Updates page on the Bromelkamp website.*
5. If you are missing any references, scroll down and select them. Once they are all selected, click OK.
6. Reopen the References window and check that the references are in the correct order. Use Priority arrows to change order if necessary.



## TEST PEARL FUNCTIONALITY (WINDOWS 7 USERS: UAC IS STILL OFF AT THIS POINT)

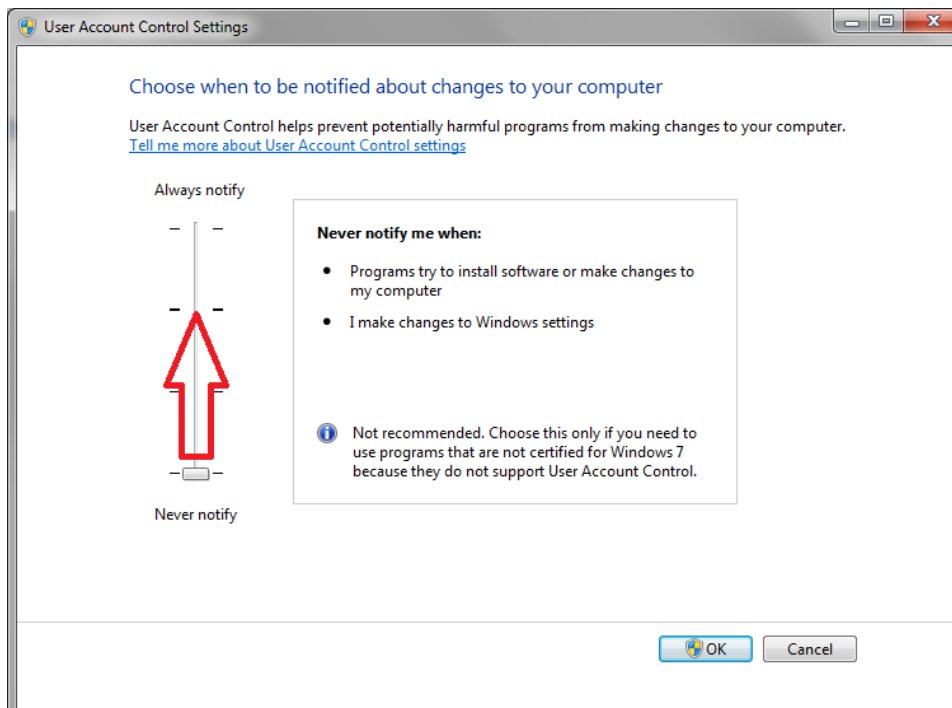
1. Open Pearl
2. If applicable, the user should login with their own Pearl username and password (type over SecurityManager)
3. Test your usual tasks, which may include data entry, reports, accounting, etc.
4. **If you have any difficulties with Pearl, please reference the additional information starting on page 10 in this document.**
5. Please contact Bromelkamp Support if you need assistance at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com).

## WINDOWS 7 USERS ONLY – TURN UAC ON

The last step for you is to turn the UAC (User Account Control) setting back on. It is EXTREMELY important that you remember to turn this back on as soon as you have completed the rest of the steps described in this document. To turn on this control:



1. Click on the **Start** button in the lower left corner of the start bar on your computer:
2. In the **Search** box, type **User Account**; You should see a list display that looks something like the screen example below.
3. Pick the **Change User Account Control Settings** option
4. Slide the **Notify** button from the **Never Notify** position back up to the mid-position (**Notify me – Only when Programs try to Make changes to my computer**). Click the **OK** button.



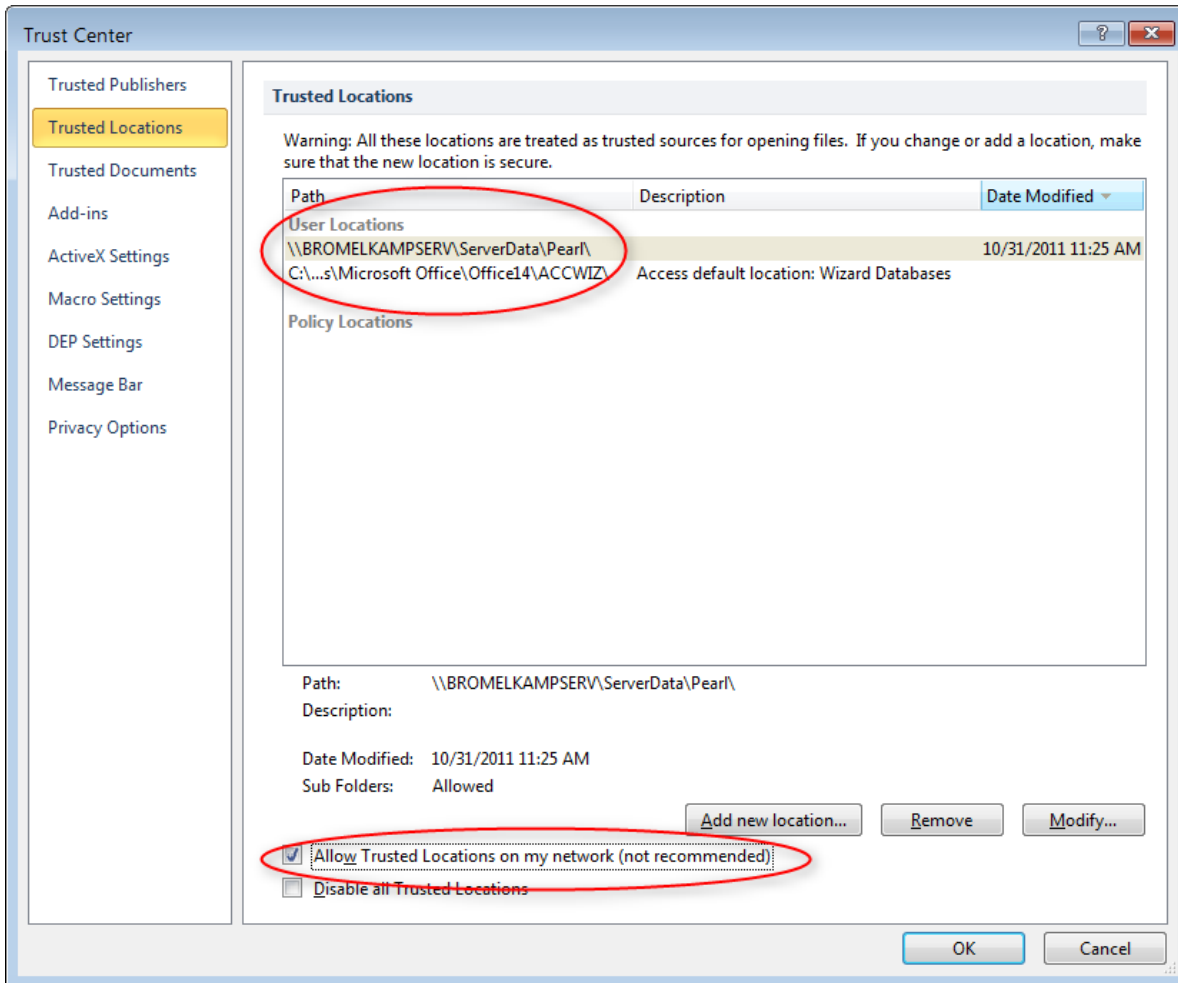
## 5. **Reboot your computer.**

## TEST PEARL FUNCTIONALITY WITH UAC ON

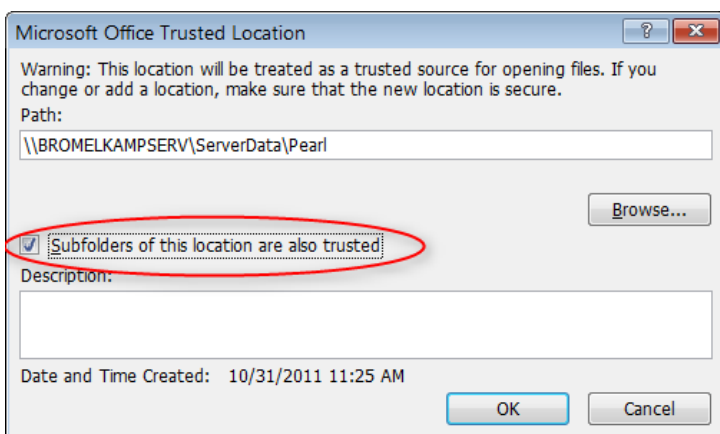
1. Open Pearl
2. If applicable, the user should login with their own Pearl username and password
3. Test your usual tasks, which may include data entry, reports, accounting, etc.
4. If you have any difficulties with Pearl, please reference the additional information on the remaining pages of this document.
5. Please contact Bromelkamp Support if you need assistance at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com).

## OPTIONAL: ENABLE MACROS FOR TRUSTED LOCATIONS ONLY

For more security in other Access databases, you may wish to set **Macro Settings** to **Disable all macros with notification**. Then, in the Trusted Locations tab, add the Pearl folder as a trusted location. If Pearl is on a network server, be sure to check **Allow Trusted Locations on my network**.



When you add a new location, be sure to check **Subfolders of this location are also trusted**.

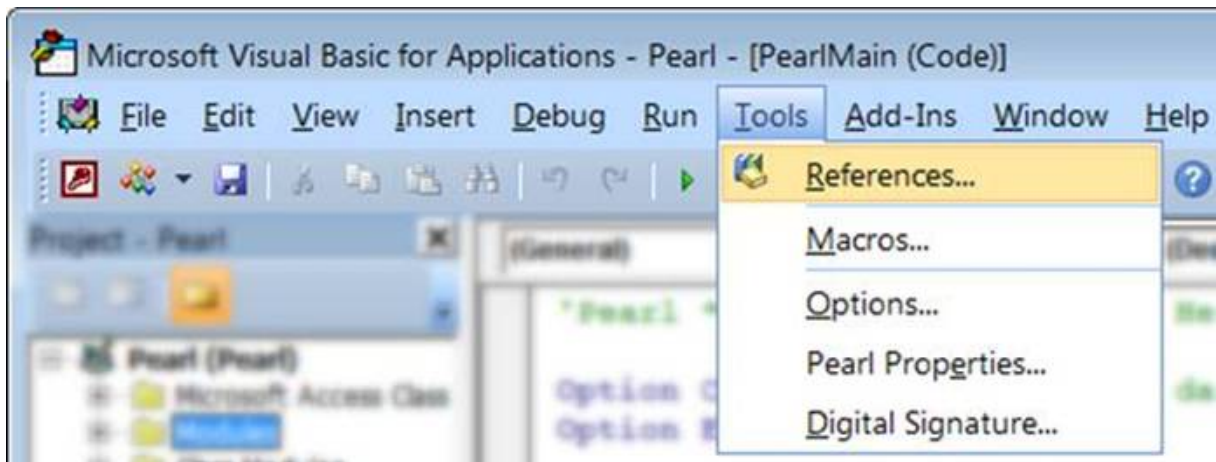


## TROUBLESHOOTING: PEARL GUIDESTAR CHARITY CHECK OR EGRANT WEB SERVICE IMPORT DO NOT WORK OR ERROR MESSAGE "METHOD 'FULLPATH' OF OBJECT 'REFERENCE' FAILED"

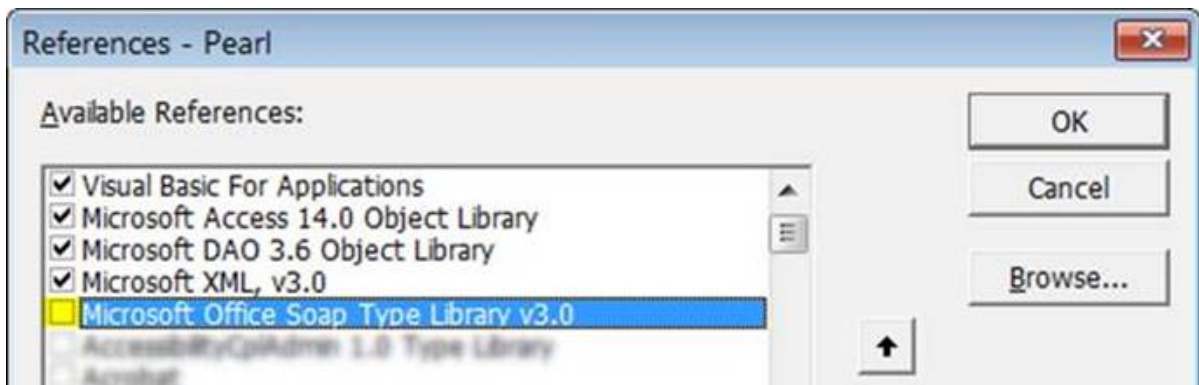
These errors mean the Microsoft Office Soap Type Library v3.0 (MSSOAP30.dll) reference is not registered with the correct path in Pearl on a particular workstation. The steps below will need to be taken on each individual workstation which has the issue, even though the reference is set in the shared database file.

### Instructions to correct the path for the MSSOAP30.dll reference in Pearl

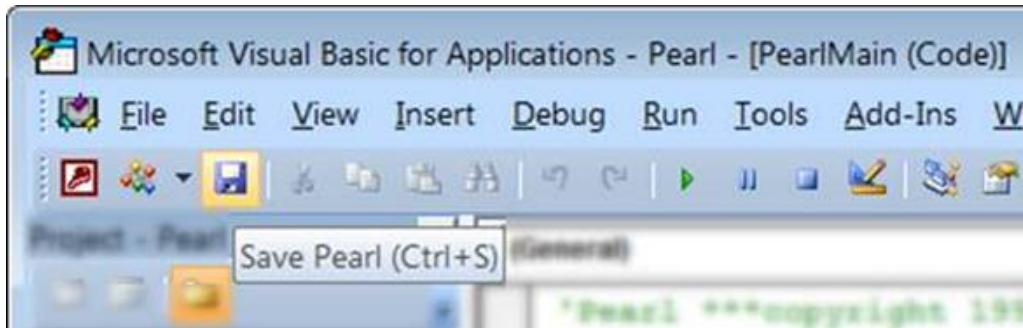
1. Ensure Pearl has the most recent update applied.
2. Windows 7 users, turn UAC off (see page 2.)
3. **CRITICAL STEP:** Do a search on the hard drive of the workstation (*usually the C:\ drive, be sure to include hidden files and folders*) and rename any existing copies of MSSOAP30.dll to **MSSOAP30\_14.DLL**.
4. Make sure **no one else is in Pearl**
5. **Open** the Pearl database
6. Press **Ctrl+G** to open the Visual Basic editor with the cursor in the Immediate window
7. From the menu in the VB editor go to **Tools > References**



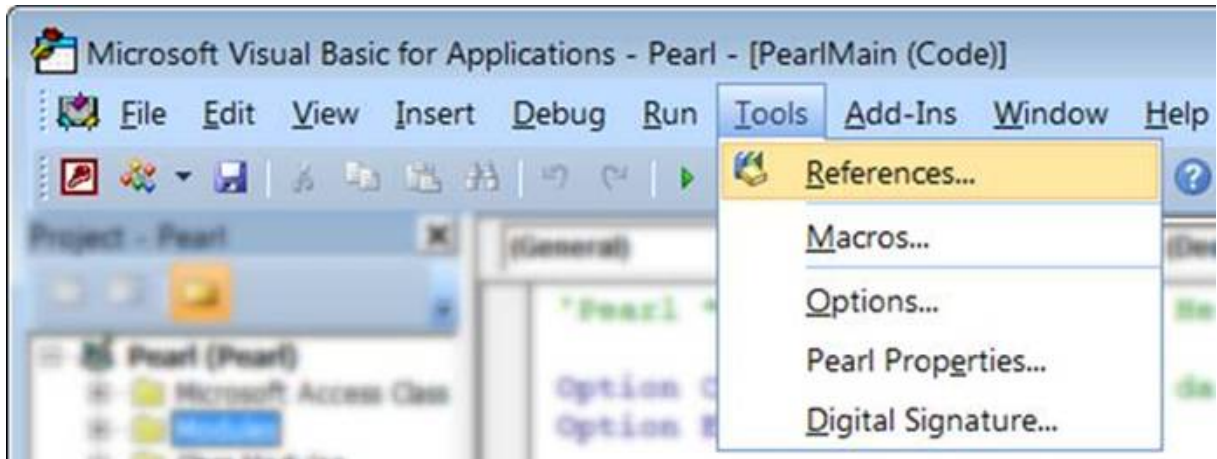
8. In the References dialog box, **uncheck "Microsoft Office Soap Type Library v3.0"**, Click **OK**



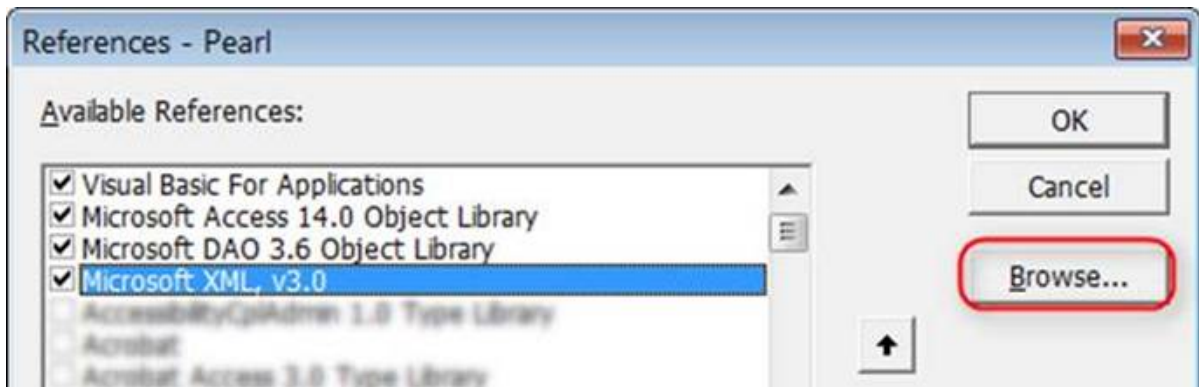
9. From the menu in the VB editor, click **Save**



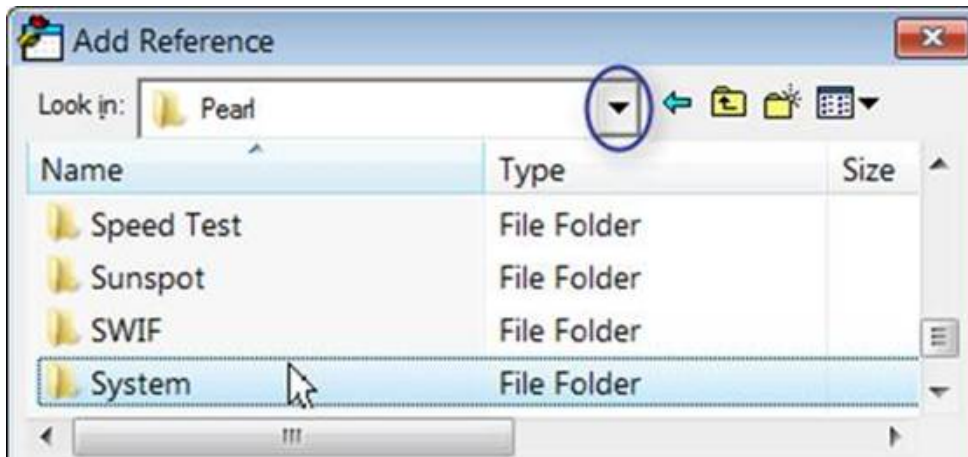
10. From the menu in the VB editor go to **Tools > References** again



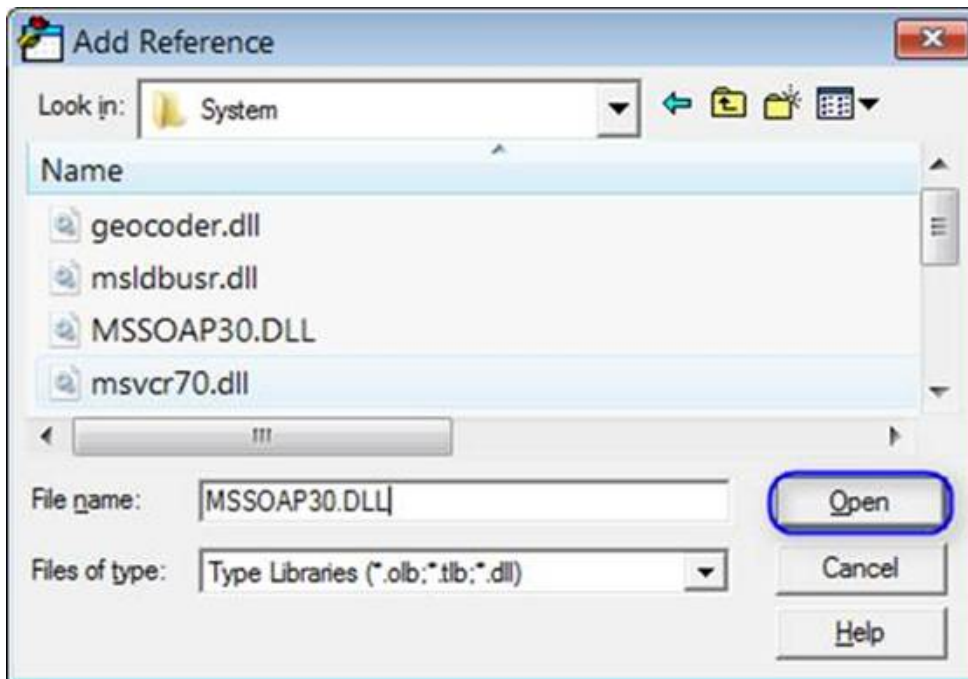
11. Click **Browse** to open the Add Reference dialog box



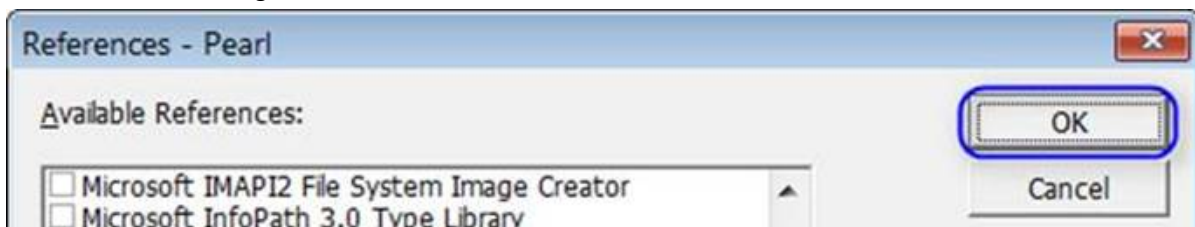
12. Click on the drop down and browse to your ...\Pearl\System folder



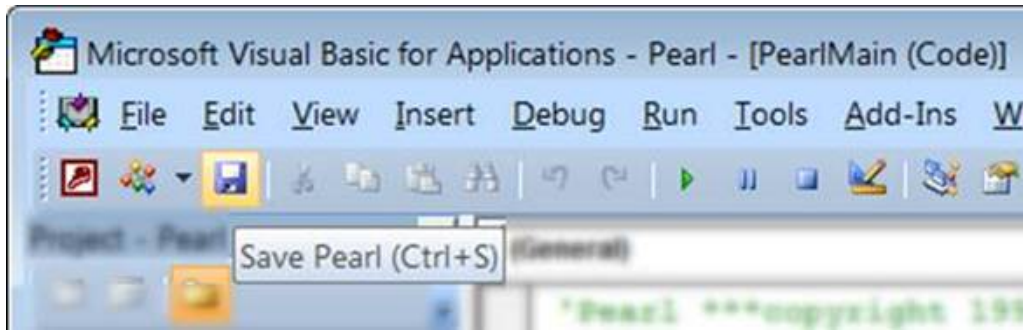
- 13. a) Double-click to open the **System** folder
- b) Type "MSSOAP30.dll" in the File name
- c) Click **Open**



14. In the References dialog box, click **OK**



15. Again, from the menu in the VB editor, click **Save**



16. **Close** the Visual Basic editor and **close Pearl**

17. **Open** the **Pearl** database

Note: If Pearl does not open normally, see section B below and contact Bromelkamp Support at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com).

18. Windows 7 users, turn UAC back to the original setting (see page 7.)