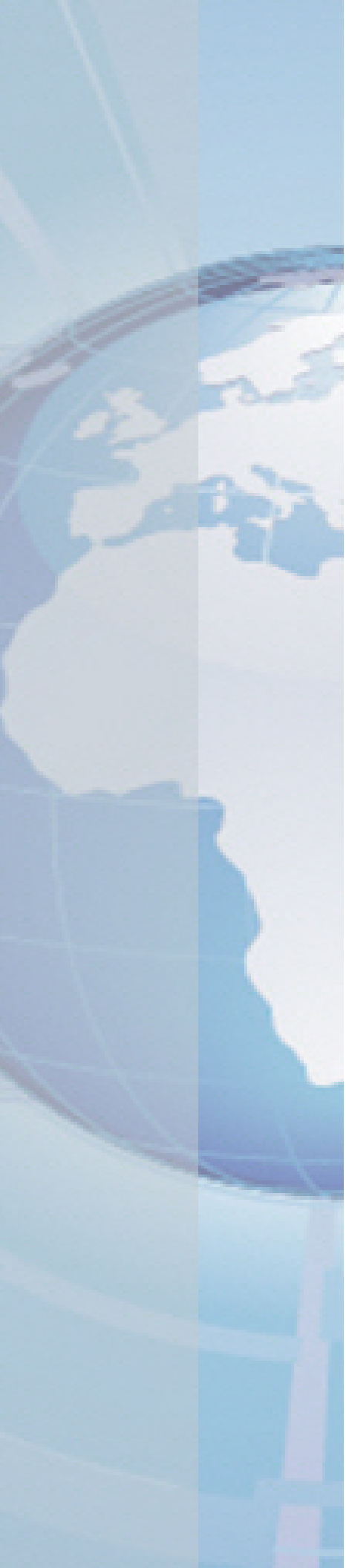

Whitepaper

Importing Data from Microsoft® Access® into LISTSERV® Maestro

August 24, 2010

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Introduction

The purpose of this white paper is to demonstrate how to use the ODBC driver plugin with Microsoft® Access® database files. This allows LISTSERV® Maestro to use Access databases as a data source, making it possible to have LISTSERV Maestro extract data directly from an Access database [3].

The ODBC driver plugin is a special database plugin that allows recipient information or drop-in content to be pulled from any ODBC data source. The ODBC driver plugin can be used in the recipient wizard with the "*Select Recipients From a Database*" recipient type [1]. It can also be used in the target group wizard with the "*LISTSERV Maestro Retrieves Recipients from Database*" target group type [3] to retrieve recipient information from an ODBC data source. Additionally, it can be used to create drop-in content elements by retrieving content information from a database [1]. ODBC drivers exist for many applications, making a wide range of data available to LISTSERV Maestro for recipient retrieval or drop-in content definition.

By connecting directly to an Access database, you can use any standard SQL statement to extract data. You can even use the Access tools and wizards for constructing your query and testing it within Access. Then, by switching from Design View to SQL View, you can copy the SQL statement from Access and paste it in to LISTSERV Maestro.

Setting Up the ODBC Driver Plugin in LISTSERV Maestro

Before the ODBC driver plugin can be used for recipient or drop-in content definition, it must first be registered as an available plugin in the Administration Hub. This needs to be done by the LISTSERV Maestro administrator. Please see Section 9.2, Registering a Database Plugin, of the *LISTSERV Maestro Administrator's Manual* [2].

Setting Up the ODBC Driver for Access in LISTSERV Maestro

Once the ODBC driver plugin has been enabled in the Hub, the specific driver for Access ODBC needs to be on the server where the Maestro User Interface (LUI) resides. For machines running Windows, the Access ODBC driver should already be part of the operating system.

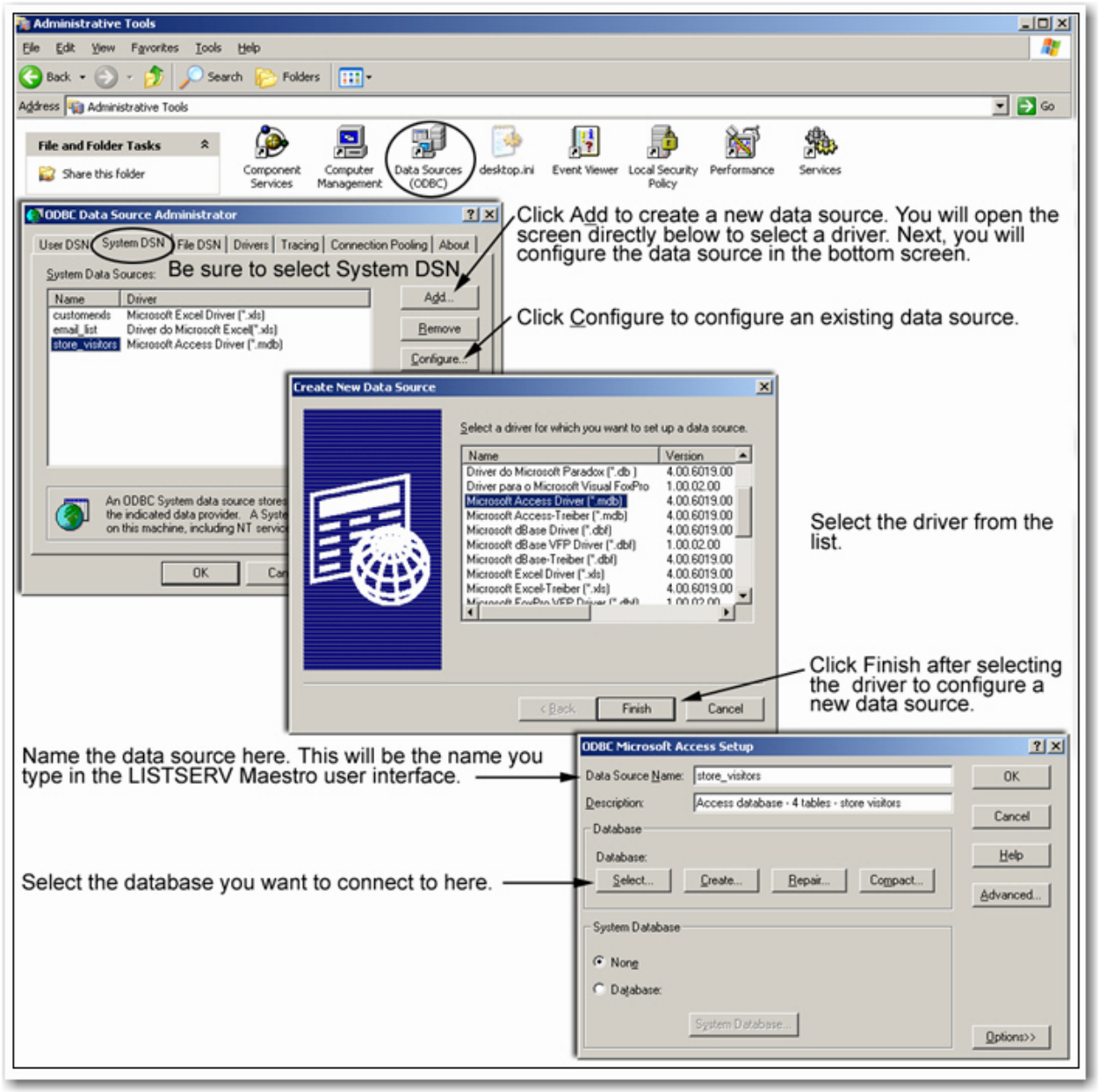
Setting Up the ODBC Data Source

Before it's possible to use an ODBC data source from inside of LISTSERV Maestro, the data source needs to be set up, which must be done on the server where the Maestro User Interface (LUI) component is installed. This task needs to be done by the LISTSERV Maestro administrator or another administrator with access to this server. How this is accomplished depends on the operating system and the ODBC driver being used for the data source.

In Microsoft Windows 2000 and Windows XP, for example, an ODBC data source can be set up using the Start menu: **Start** > **Control Panel** > **Administrative Tools** > **Data Sources (ODBC)**.

Important: The Access ODBC driver does not require a user name or password. If the database you are connecting to does not have a user name and password associated with it, every LISTSERV Maestro account that has the right to connect to a database will have access to it. The ODBC connection for Access is not recommended for very high-volume applications. It is also not recommend for installations serving multiple distinct groups unless it is protected by a user name and password.

Figure 1 Setting up an ODBC Data Source in Microsoft Windows



Accessing the ODBC Data Source from LISTSERV Maestro

Once a data source is set up, access to it from LISTSERV Maestro user accounts can occur any time from any computer that has access to the LISTSERV Maestro installation. This data source can be used for recipient definition (recipients wizard or target groups wizard – see Figures 2 and 3) or for content definition using a database drop-in (see Figure 4).

Please see Section 5.6, Selecting Recipients from a Database, of the *LISTSERV Maestro User's Manual* for more information on the "*Select Recipients from a Database*" recipient type and Section 15.3, Creating and Managing Drop-In Content Elements, for more information on database drop-ins [1]. Section 17 of the *LISTSERV Maestro Data Administrator's Manual* has more information on the "*Select Recipients from a Database*" target group type [3].

These functions all need the database connection details to specify from where the recipients or the drop-in content will be retrieved. To specify the connection details:

1. Select the **ODBC Driver Database Plugin** from the drop-down list of available plugins.
2. Enter the name of the data source to be accessed.
3. Fill in the **Database User Name** and **Password** fields if your Access database is set up to use them. If no password/user name are required for your database, leave the fields blank.
4. Enter the **SQL statement** needed to retrieve the recipients/content desired in the format required by the Access ODBC driver. See the Access ODBC driver documentation for details [5] (some syntax examples for Access are provided in the next section).

Figure 2 Using the ODBC Plugin in the Define Recipients Wizard to Select Recipients from a Database

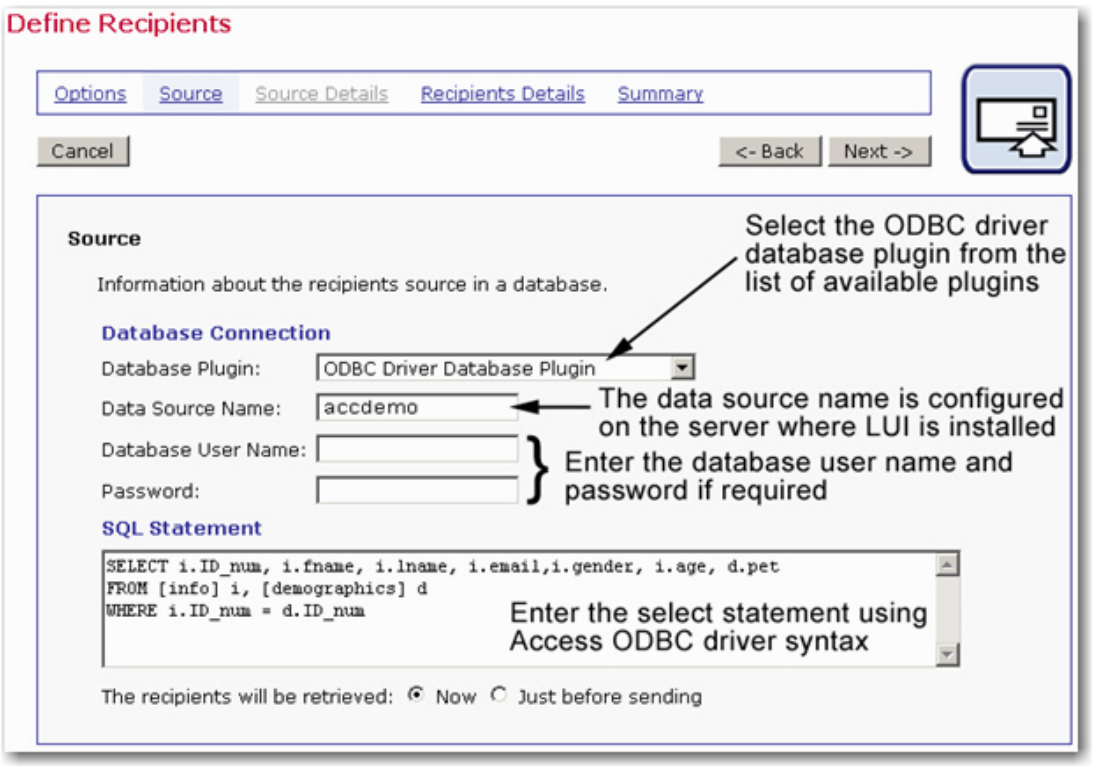


Figure 3 Using the ODBC Plugin in the Target Groups Wizard to Select Recipients from a Database

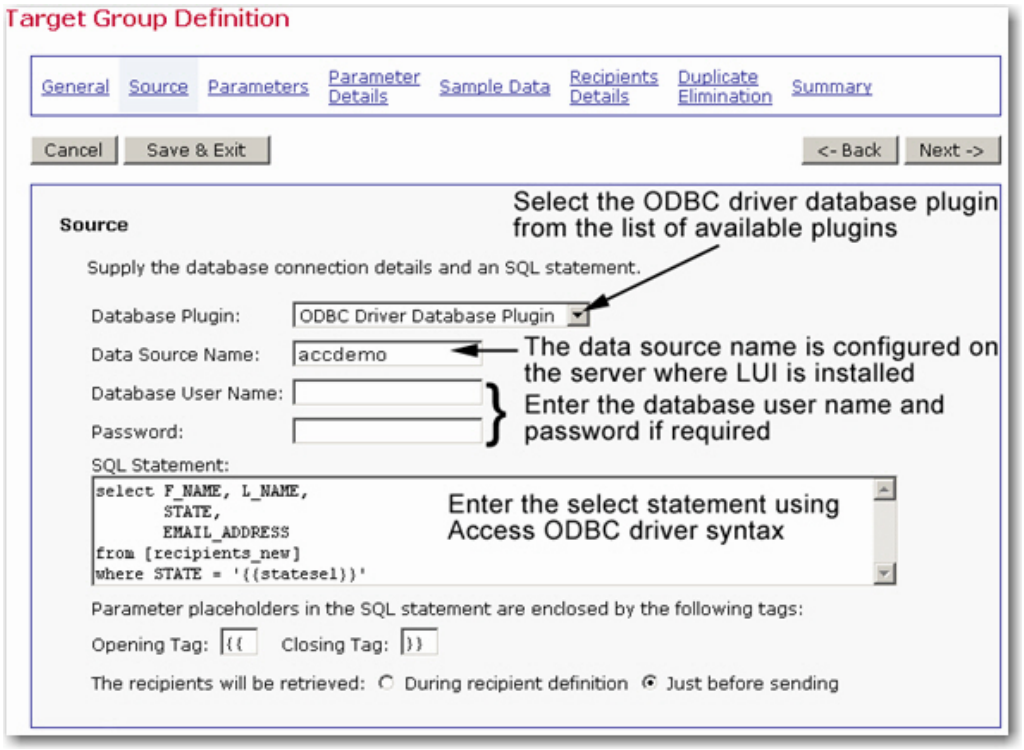
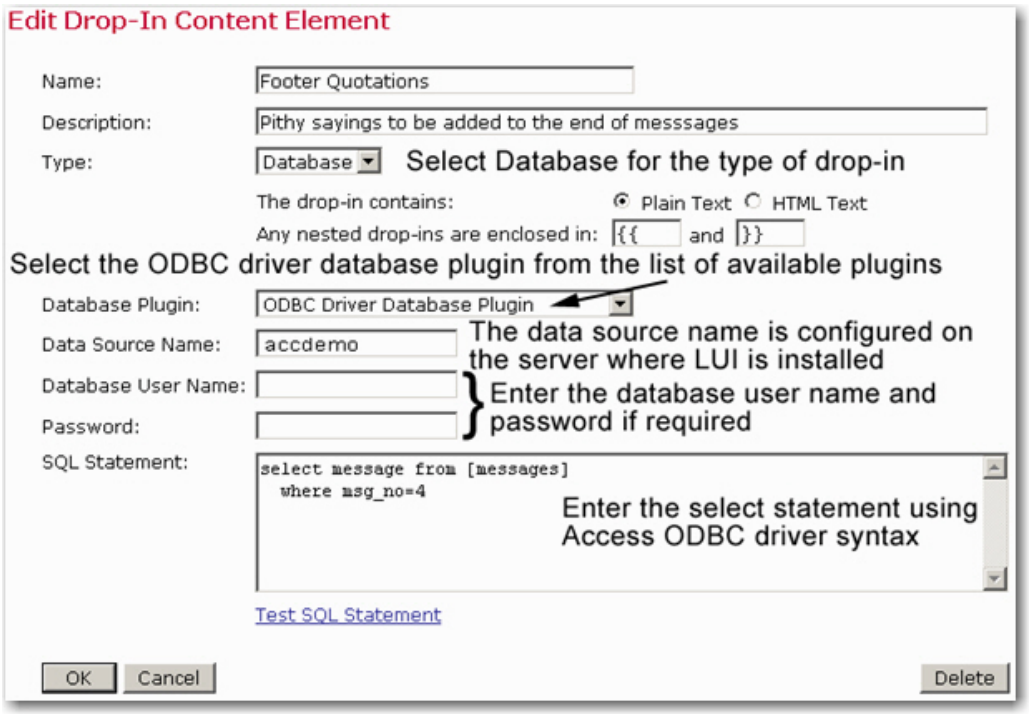


Figure 4 Using the ODBC Plugin for Drop-In Content Definitions

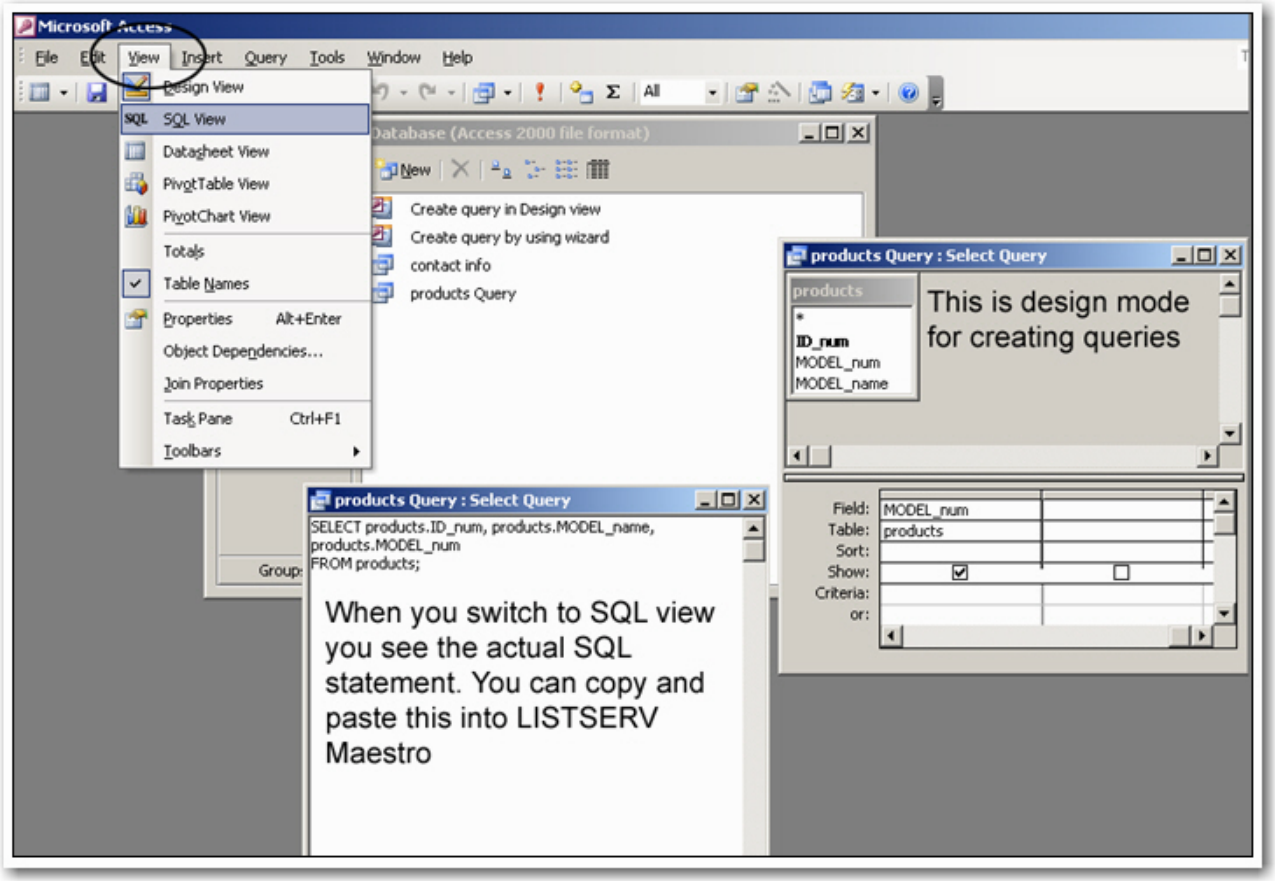


SQL Statements and Access

The syntax for making queries using Microsoft Access as a data source is based on the SQL SELECT statement syntax. Table names need to be within square brackets [ ]. If you are familiar with working n the Access Interface to create SQL queries, you can use these tools to construct your query and test it. Then, by switching from Design View to SQL View, you can simply copy the SQL statement from Access and paste it in to LISTSERV Maestro.

To accomplish this, open Access and create your query in the Wizard or using the Design view. Run your query against your data to make sure you are selecting the data you want from the database. After testing, switch to SQL view [6]. From there you can copy the SQL statement and paste it into LISTSERV Maestro.

Figure 5 Switching Between Design View and SQL View in Microsoft Access



Using Access with Microsoft Outlook or Microsoft Exchange Address Books

You can easily import your Microsoft Outlook or Exchange Contacts list (address book) into Access. From there you can use the database as a data source to quickly use your contacts, or a subset of them, as recipients of a LISTSERV Maestro email job.

Open Outlook, switch to the contacts view, and then click **File** > **Import and Export** > **Export to a file**. Select **Microsoft Access** as the file type, and then choose the folder to export from (the Contacts folder). Finally, select a name and location for the exported file and click **[Finish]**.

Your contacts and all the associated data will be imported into a new Access database. From there you can set it up as a data source and select recipients for a job. Be aware that any new

contacts added to your address book will not be reflected in the Access database unless you re-import or add them manually.

Using the ODBC plugin to connect to an Access database file as a data source can increase the flexibility of LISTSERV Maestro for those users who have data in Access databases or have data that is easily converted into Access databases. Although this is not a recommended solution for large production or for those LISTSERV Maestro installations supporting multiple distinct groups, this option can save time and resources by using existing data.

References

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