Microsoft

Ways Access integrates with Office 365

Excel

Outlook

Word

A Access

Publisher

V Visio

S SharePoint
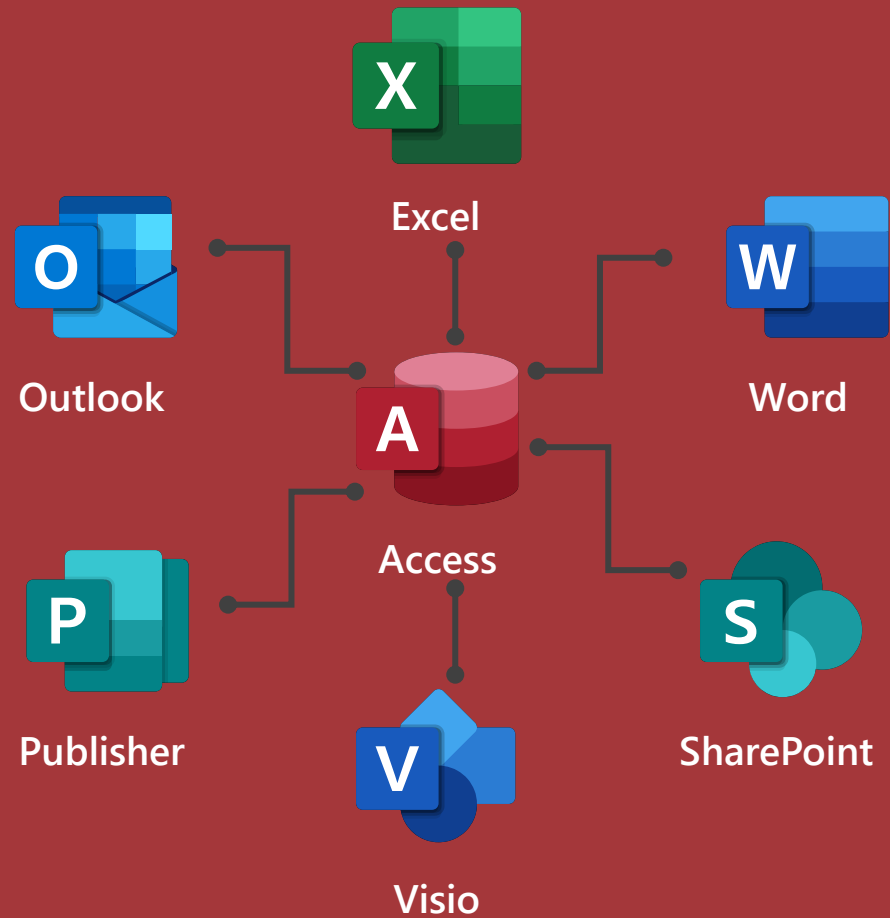
Access is an integral part of Office 365

- Expand the scope of your Access solutions.
- Import, link, move, and export data.
- Leverage other Office 365 apps.
- Combine apps and data in useful and creative ways.

Using Access with Excel: Import and Link

Use Import/Link spreadsheet wizard to easily connect to data

☑ First Row Contains Column Headings

ID	Product Code	Product Name	Standard Cost
6 7	NWTDFN-7	Northwind Traders Dried Pears	22.50
7 8	NWTS-8	Northwind Traders Curry Sauce	30.00
8 14	NWTDFN-14	Northwind Traders Walnuts	17.44
9 17	NWTCFV-17	Northwind Traders Fruit Cocktail	29.25
10 19	NWTBGM-19	Northwind Traders Chocolate Biscuits Mix	6.90

Field Options

Field Name: Target Level   Data Type: Double ⌄

Indexed: No ⌄   ☐ Do not imp

	Yes/No
	Byte
	Integer
	Long Integer
	Currency
	Single
	Double
	Date With Time
	Short Text
	Long Text
	Hyperlink

	Target Level	Quantity Per Unit	Dis	Rec
1	40	10 boxes x 20 bags	FAL	
2	100	12 - 550 ml bottles	FAL	
3	40	48 - 6 oz jars	FAL	
4	40	36 boxes	FAL	
5	100	12 - 8 oz jars	FALSE	25
6	40	12 - 1 lb pkgs.	FALSE	10

Import — Copy Excel data into an Access table without changing it.

Link — Create an Access table linked to the Excel worksheet. Changes in Excel appear in Access.

See the data you import or link and set column headers.

Accept field option defaults or change the field name and data type on the fly.

Case in point

✓ You receive Excel data you want to merge with an Access database.
✓ You want to streamline the import process by scheduling it once a week.
✓ You frequently update Excel data but need the data consistency of a relational database.

Using Access with Excel: Export

Export a table, query, form, or report

☑ **Export data <u>w</u>ith formatting and layout.**
Select this option to preserve most formatting and layout information when exporting a table, query, form, or report.

☑ **Open the desti<u>n</u>ation file after the export operation is complete.**
Select this option to view the results of the export operation. This option is available only when you export formatted data.

☑ **Export only the <u>s</u>elected records.**
Select this option to export only the selected records. This option is only available when you export formatted data and have records selected.

Export   Creates a copy of the Access data in Excel.

Export data as formatted or unformatted

Data Type	Unformatted example	Formatted example
Rich text	Uneasy lies the head that wears the crown.	<mark>Uneasy</mark> lies the head *that wears the crown.*
Lookup	23 (the ID value)	Mint cookies (The Looked up value)
Hyperlink	Bing#www.bing.com#	[Bing](www.bing.com)

Case in point

- ✔ Your department uses Access and Excel; you store data in Access, but you export to Excel to analyze data.
- ✔ You often copy Access data into Excel, but you want to automate this process to be more productive.
- ✔ A subset of your access data needs Excel features, such as PivotTables and Solver.

Using Access with Word: Mail Merge

What is Mail Merge? A way to batch letters, labels, and envelopes identical in content except for personalized parts.

What are the basic steps?

1. Open a document.
2. Select recipients.
3. Fine-tune the list.
4. Write the letter.
5. Add address block.
6. Preview the mail merge.

Note You can merge any data, such as inventory records and tasks. You can also do a mail merge between Access and Publisher.

Step 3: Fine-tune the list

☑	Last name	First name	Address	City	State	Zip
☑	Solomon	Eric	15 Oak Ave.	Seattle	WA	97803
☐	Reed	Christopher	23 Main St.	Portland	OR	12345
☑	Ross	Henry	100 Broadway Blvd.	Vancouver	WA	45678
☑	Evans	Jamie	18 East St.	Bellevue	WA	23232
☑	Gonzales	Aaron	78 Western Ave.	San Jose	CA	10987
☑	Richardson	Tomas	235 Spruce Way	Sonoma	CA	34512
☑	Rodriguez	Amber	3456 Cedar Dr.	Boise	ID	87654
☐	Henderson	Felix	1 Bamboo Terrace	Butte	MT	9876
☑	Sullivan	Maria	45 Bush Lane	Sun Valley	ID	12124
☑	Stuart	Brandon	236 Daisy Ave.	Issaquah	WA	45458

Step 4: Write the letter

Contoso
234 Bicycle Drive
Wheeling WV, 45456

«AddressBlock»

We are holding a special sale for Bicycle accessories and you are exclusively invited to our onli site. We value you as a customer and want to give you reduced prices. Please attend our site a www.contoso.specialsales.com.

Sincerely,
Contoso Sales

Step 5: Add address block

Here is a preview from your recipient list:

◁ ◁ 10 ▷ ▷

Brandon Stuart
236 Daisy Ave.
Issaquah, WA 45458

Using Access with SharePoint: Import, Link, Move, and Export

Export Access data to SharePoint

ID ∨	Product Code ∨	Product Name ∨	List Price ∨	Reorder ∨
Category : Canned Meat (3)				
14	NWTCM-40	Crab Meat	$18.40	30
41	NWTCM-95	Tuna Fish	$2.00	30
42	NWTCM-96	Smoked Salmon	$4.00	30
			Average $8.13	
Category : Cereal (2)				
29	NWTC-82	Granola	$4.00	20
43	NWTC-82	Hot Cereal	$5.00	50
			Average $4.50	

● —— Create a SharePoint list view for easy web access

● —— Make a grouped view

● —— Display the average List Price

Case in point

- ✔ **Import**   Copy a SharePoint contacts or issues list into Access.
- ✔ **Link**   Your department uses a SharePoint list linked to Access to use an Access split form.
- ✔ **Move**   Create a backend of SharePoint lists but keep the Access front-end.
- ✔ **Export**   Periodically export results of a query to a team site.

Advantages of combining data between Access and SharePoint

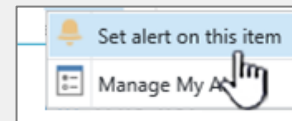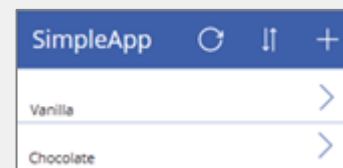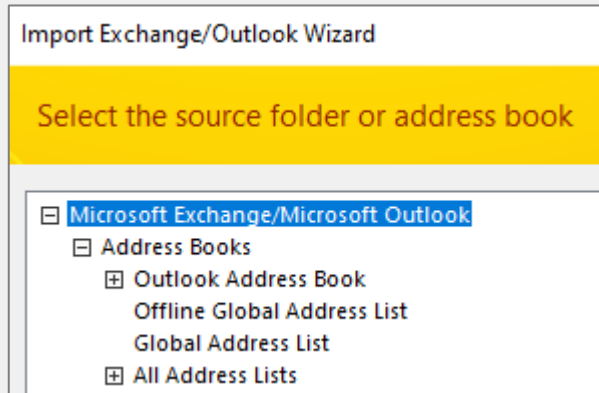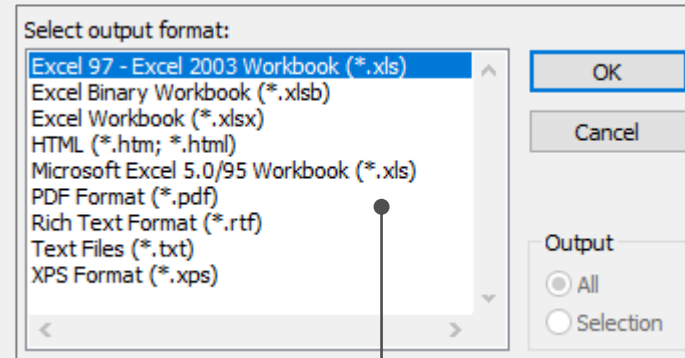| Feature	Description	Example
Issue Tracking	Use Access Issue Tracking template that interacts with SharePoint Issue Tracking list	
Change history	View historical changes made to a field in SharePoint and Access	
Work offline	Work in Access when SharePoint unavailable. Synchronize changes/resolve conflicts when SharePoint available.	
Get alerts	Know when changes are made to values from email or text messages.	
Mobile	Use a cell phone to view list items and do light editing.	
Power Automate	Set up a SharePoint linked list with an approval request or push notification.	
Power Apps	Customize a linked list form as a quick solution.	
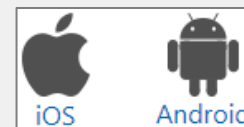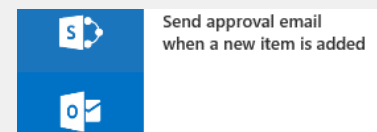
Using Access with Outlook

A **Import contacts from Outlook ...**

Import Exchange/Outlook Wizard
Select the source folder or address book

⊟ Microsoft Exchange/Microsoft Outlook
  ⊟ Address Books
    ⊞ Outlook Address Book
      Offline Global Address List
      Global Address List
    ⊞ All Address Lists

Attach an Access object to an email message

Select output format:

Excel 97 - Excel 2003 Workbook (*.xls)	OK
Excel Binary Workbook (*.xlsb)	
Excel Workbook (*.xlsx)	Cancel
HTML (*.htm; *.html)	
Microsoft Excel 5.0/95 Workbook (*.xls)	
PDF Format (*.pdf)	
Rich Text Format (*.rtf)	Output
Text Files (*.txt)	⦿ All
XPS Format (*.xps)	◯ Selection

Choose from a variety of formats.

B **... and create a query of top customers.**

Last Name	First Nam	Job Title	Address	City
Bedecs	Anna	Owner	123 1st St.	Seattle
Axen	Thomas	Purchasing Rep	123 3rd St.	Los Angelas
Andersen	Elizabeth	Purchasing Rep	123 8th St.	Portland
Mortensen	Sven	Purchasing Mgr	123 9th St.	Salt Lake City
Edwards	John	Purchasing Mgr	123 12th St.	Las Vegas
Goldschmidt	Daniel	Purchasing Rep	456 16th St.	San Francisco
Bagel	JP	Owner	456 17th St.	Seattle
Eggerer	Alexander	Accounting	789 19th St.	Los Angelas
Entin	Michael	Purchasing Mgr	789 23th St.	Portland
Hasselberg	Jonas	Owner	789 24th St.	Salt Lake City
Toh	Karen	Purchasing Mgr	789 27th St.	Las Vegas

Top Customers

Using Access with Outlook (continued)

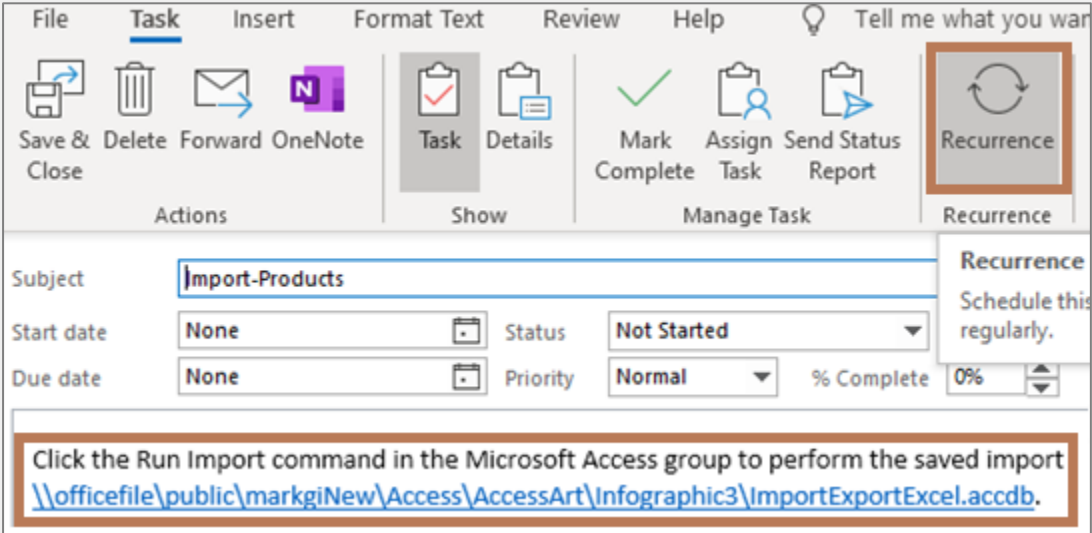**A**   Schedule an import or export specification...

Create an Outlook Task.

    If you regularly repeat this saved operation, you can create an Outlook task

    ☑ Create Outlook Task

B   ...and make it a recurring task

| File | Task | Insert | Format Text | Review | Help | �| Tell me what you wan |

Save & Close   Delete   Forward   OneNote   Task   Details   Mark Complete   Assign Task   Send Status Report   Recurrence

Actions   Show   Manage Task   Recurrence

Recurrence
Schedule this regularly.

Subject	Import-Products
Start date	None	Status	Not Started
Due date	None	Priority	Normal	% Complete	0%

Click the Run Import command in the Microsoft Access group to perform the saved import \\officefile\public\markgiNew\Access\AccessArt\Infographic3\ImportExportExcel.accdb.

Case in point

- ✔ Streamline import and export operations you regularly use in Access.
- ✔ Automate operations without macros or code.
- ✔ Keep track of operations with other daily tasks.

Using Access Forms and Reports with Office objects

To enhance a form, add an attachment control to contain documents, worksheets, slides, and pictures

Add an Attachment control to a form or report.

Add and manage several attachments at once.

Open the attached file from the form.

Note Many image types are supported, some are automatically compressed, but some files are blocked for security reasons (.vbs, .bat, .com, and so on).

Distributing Access reports

Email PDF reports to users and export them to SharePoint

Outlook
Send E-mail message

SharePoint
Add to report library
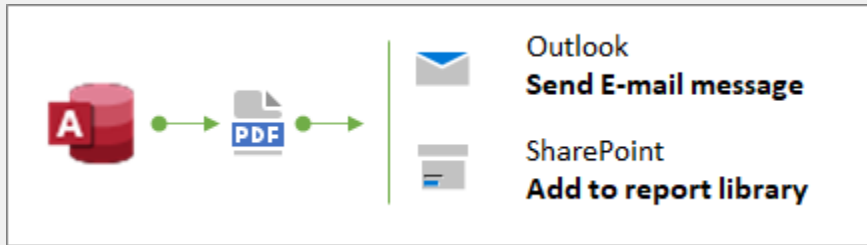
Tip   Add a time stamp to a report so people know when data was captured.

☑ Include Date
◉ Tuesday, November 12, 2019
○ 12-Nov-19
○ 11/12/2019

☑ Include Time
◉ 9:32:59 AM
○ 9:32 AM
○ 9:32

Sample:
Tuesday, November 12, 2019
9:32:59 AM

Case in point

- ✔ Create a static report of data at a certain moment in time, such as daily, weekly, or monthly.
- ✔ Establish a single point of truth to make good business decisions.
- ✔ Help information workers answer questions, find alternatives, determine best plans, evaluate risks, and improve quality.
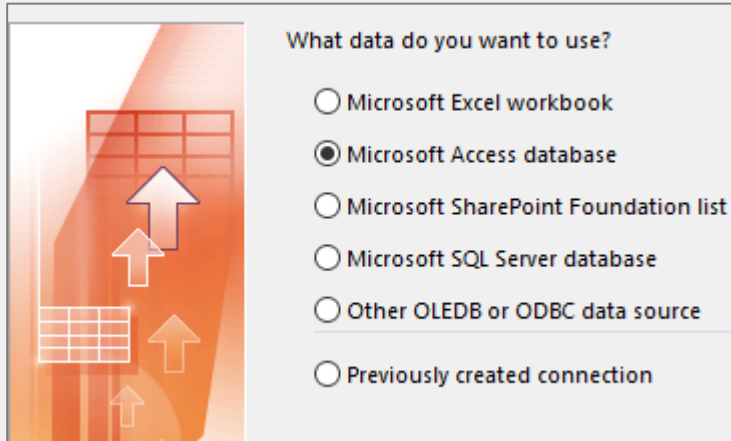
Did you know?

A SharePoint document library can effectively act as a report center:
- ✔ PDF files can open in Adobe Acrobat reader for easy reading, paging, searching, and printing.
- ✔ Libraries can have custom views tailored to different types of users.
- ✔ Automation can be used to maintain and organize reports.
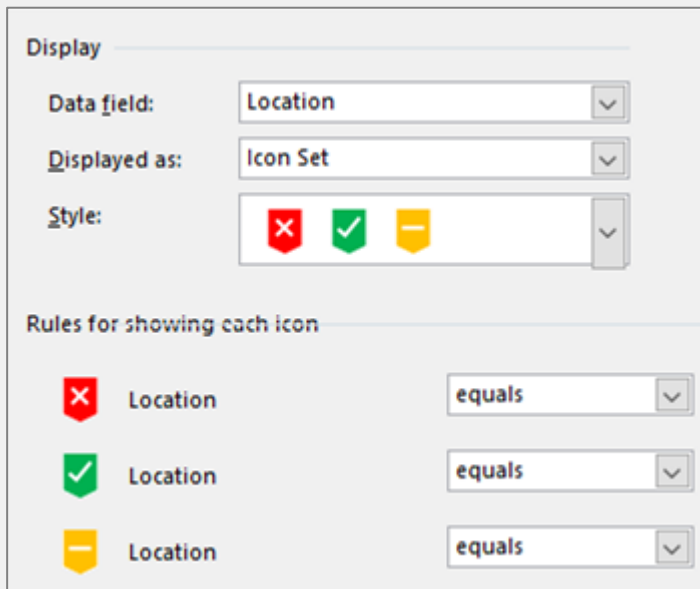
Using Access as a data source in Visio

Select Access as your data source

What data do you want to use?

○ Microsoft Excel workbook

◉ Microsoft Access database

○ Microsoft SharePoint Foundation list

○ Microsoft SQL Server database

○ Other OLEDB or ODBC data source

○ Previously created connection

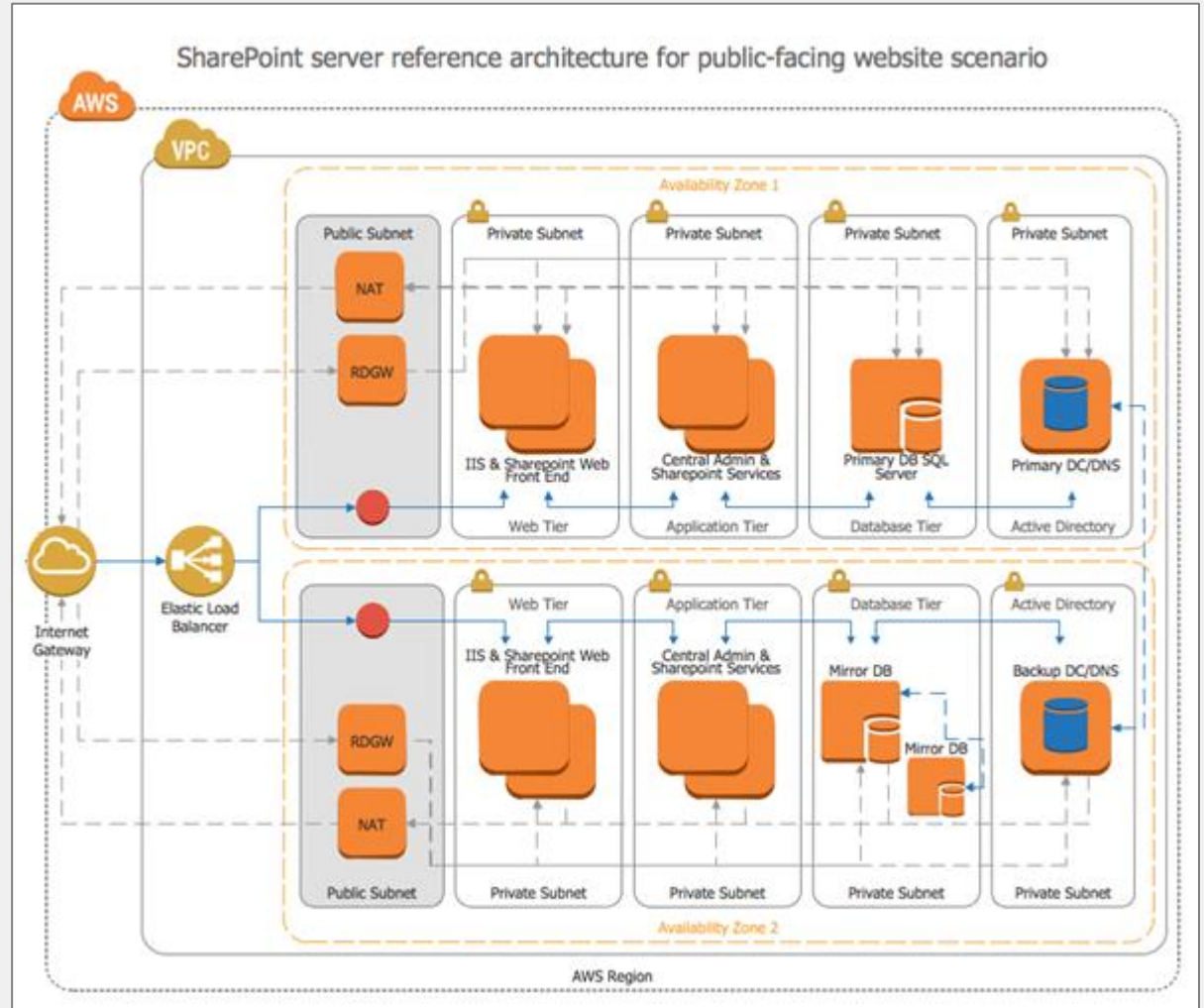## Map the data to a data graphic

Display

Data field: Location

Displayed as: Icon Set

Style: ❌ ✅ ➖

Rules for showing each icon

❌ Location   equals

✅ Location   equals

➖ Location   equals

Create a diagram based on Access data and using data graphics

SharePoint server reference architecture for public-facing website scenario

Using Access VBA to reference Office Object Libraries

Developers can enhance their solution, by referencing other Office Object models

References dialog box:

References - Database31	☓
Available References:	

Available References:
- ☑ Visual Basic For Applications
- ☑ Microsoft Access 16.0
- ☐ Microsoft Office 16.0
- ☑ Microsoft Excel 16.0
- ☐ Microsoft Outlook 16.0
- ☐ Microsoft PowerPoint 16.0
- ☐ Microsoft Project 16.0
- ☑ Microsoft Word 16.0

Buttons: OK, Cancel, Browse…, Help
Priority: ↑ ↓
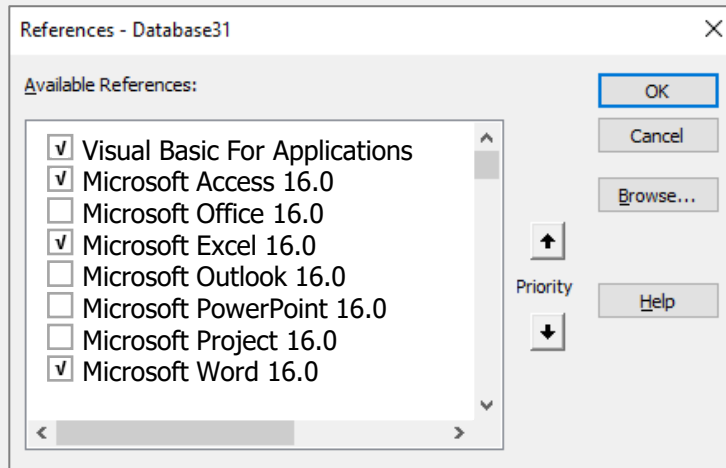
```vba
Dim xlApp As Object     ' Declare variable to hold the reference.

Set xlApp = CreateObject("excel.application")
    ' You may have to set Visible property to True
    ' if you want to see the application.
xlApp.Visible = True
    ' Use xlApp to access Microsoft Excel's
    ' other objects.
```

Case in point

- ✓ Use an Excel financial function not available in Access, such as the Treasury bill functions (TBILLEQ, TBILLPRICE, TBILLYIELD).
- ✓ Leverage a company-standard Word template to create an Access report.
- ✓ Integrate and control a PowerPoint presentation into a form.

Note By using the **References** dialog box, you can add other kinds of references such as ActiveX controls, Type Libraries, and Executable files. You can also add Office ActiveX controls to forms and reports.

Resources

Excel
Import or link to data in an Excel workbook
ImportExportSpreadsheet Macro
Export data to Excel
ExportWithFormatting Macro Action

Word
Use mail merge to send Access data to Word
Use mail merge for email, letters, labels, envelopes
Create a sheet of nametags or address labels
Create mailing labels in Access
Export Access data to a Word document
Use a table or query as a mail-merge data source

SharePoint
Import, link, or move data to SharePoint
Export a table or query to a SharePoint site
ImportSharePointList Macro Action
ExportWithFormatting Macro Action

Outlook
Import or link contacts from Outlook address book
Export contacts to an Outlook address book
EMailDatabaseObject Macro Action
Schedule an import or export specification
Attach an Access object to an email message

Office objects
Attach files/graphics to records in your database
Introduction to controls

VBA
Introduction to Access programming
Getting started with VBA in Office
References dialog box
Check or add an object library reference

Access as a data source
Office data connections overview
Create, connections to external data in Excel
Use the Data Connection Wizard with Publisher
Use the Data Connection Wizard with Visio
Use the Data Connection Wizard with Word

For more information, see

support.office.com/access