Ways Access integrates with Office 365

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

<table>
<thead>
<tr>
<th>ID</th>
<th>Product Code</th>
<th>Product Name</th>
<th>Standard Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>NWTDFN-7</td>
<td>Northwind Traders Dried Pears</td>
<td>22.50</td>
</tr>
<tr>
<td>7</td>
<td>NWTFS-8</td>
<td>Northwind Traders Curry Sauce</td>
<td>30.00</td>
</tr>
<tr>
<td>8</td>
<td>NWTDFN-14</td>
<td>Northwind Traders Walnuts</td>
<td>17.44</td>
</tr>
<tr>
<td>9</td>
<td>NWTDFV-17</td>
<td>Northwind Traders Fruit Cocktail</td>
<td>29.25</td>
</tr>
<tr>
<td>10</td>
<td>NWTBGM-19</td>
<td>Northwind Traders Chocolate Biscuits Mix</td>
<td>6.90</td>
</tr>
</tbody>
</table>

**Check First Row Contains Column Headings**

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

**Link**

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.
Export a table, query, form, or report

- **Export data with formatting and layout.** Select this option to preserve most formatting and layout information when exporting a table, query, form, or report.
- **Open the destination 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 selected 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 data as formatted or unformatted

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Unformatted example</th>
<th>Formatted example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rich text</td>
<td>Uneasy lies the head that wears the crown.</td>
<td>Uneasy lies the head <em>that wears the crown.</em></td>
</tr>
<tr>
<td>Lookup</td>
<td>23 (the ID value)</td>
<td>Mint cookies (The Looked up value)</td>
</tr>
<tr>
<td>Hyperlink</td>
<td>Bing#www.bing.com#</td>
<td>Bing</td>
</tr>
</tbody>
</table>

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.

Step 3: Fine-tune the list

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

<table>
<thead>
<tr>
<th>ID</th>
<th>Product Code</th>
<th>Product Name</th>
<th>List Price</th>
<th>Reorder</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>NWTCM-40</td>
<td>Crab Meat</td>
<td>$18.40</td>
<td>30</td>
</tr>
<tr>
<td>41</td>
<td>NWTCM-95</td>
<td>Tuna Fish</td>
<td>$2.00</td>
<td>30</td>
</tr>
<tr>
<td>42</td>
<td>NWTCM-96</td>
<td>Smoked Salmon</td>
<td>$4.00</td>
<td>30</td>
</tr>
</tbody>
</table>

**Average**

$8.13

```
Category : Canned Meat (3)
```

```
Category : Cereal (2)
```

- **Create a SharePoint list view for easy web access**
- **Make a grouped view**
- **Display the average List Price**

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**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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue Tracking</td>
<td>Use Access Issue Tracking template that interacts with SharePoint Issue Tracking list</td>
<td><img src="image1.png" alt="Issue Tracking Example" /></td>
</tr>
<tr>
<td>Change history</td>
<td>View historical changes made to a field in SharePoint and Access</td>
<td><img src="image2.png" alt="Change History Example" /></td>
</tr>
<tr>
<td>Work offline</td>
<td>Work in Access when SharePoint unavailable. Synchronize changes/resolve conflicts when SharePoint available.</td>
<td><img src="image3.png" alt="Work Offline Example" /></td>
</tr>
<tr>
<td>Get alerts</td>
<td>Know when changes are made to values from email or text messages.</td>
<td><img src="image4.png" alt="Get Alerts Example" /></td>
</tr>
<tr>
<td>Mobile</td>
<td>Use a cell phone to view list items and do light editing.</td>
<td><img src="image5.png" alt="Mobile Example" /></td>
</tr>
<tr>
<td>Power Automate</td>
<td>Set up a SharePoint linked list with an approval request or push notification.</td>
<td><img src="image6.png" alt="Power Automate Example" /></td>
</tr>
<tr>
<td>Power Apps</td>
<td>Customize a linked list form as a quick solution.</td>
<td><img src="image7.png" alt="Power Apps Example" /></td>
</tr>
</tbody>
</table>
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

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

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

Attach an Access object to an email message

Choose from a variety of formats.

Select output format:
- Excel 97 - Excel 2003 Workbook (*.xls)
- Excel Binary Workbook (*.xlsb)
- Excel Workbook (*.xlsx)
- HTML (*.html; *.htm)
- Microsoft Excel 5.0/95 Workbook (*.xls)
- PDF Format (*.pdf)
- Rich Text Format (*.rtf)
- Text Files (*.txt)
- XPS Format (*.xps)
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

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

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.

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

A SharePoint document library can effectively act as a report center:

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

Create a diagram based on Access data and using data graphics

Map the data to a data graphic

Display
- Data field: Location
- Displayed as: Icon Set
- Style: [X] [✓] [−]

Rules for showing each icon
- Location: equals
Developers can enhance their solution, by referencing other Office Object models

![Image of References dialog box]

```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 (TBILLEG, 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