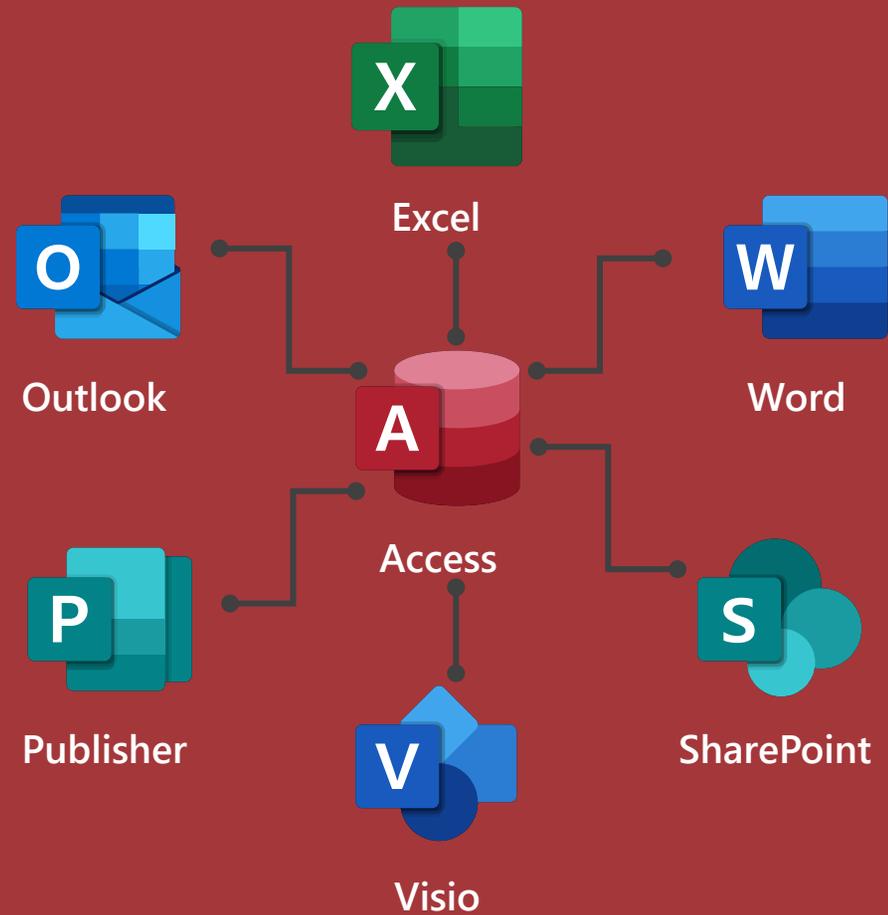


# Ways Access integrates with Office 365



## 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

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

**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.

Field Options

Field Name:  Data Type:

Indexed:   Do not import

	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

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 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** 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.	Uneasy lies the head that wears the crown.
Lookup	23 (the ID value)	Mint cookies (The Looked up value)
Hyperlink	Bing#www.bing.com#	<a href="#">Bing</a>

## 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

<input checked="" type="checkbox"/>	Last name	First name	Address	City	State	Zip
<input checked="" type="checkbox"/>	Solomon	Eric	15 Oak Ave.	Seattle	WA	97803
<input type="checkbox"/>	Reed	Christopher	23 Main St.	Portland	OR	12345
<input checked="" type="checkbox"/>	Ross	Henry	100 Broadway Blvd.	Vancouver	WA	45678
<input checked="" type="checkbox"/>	Evans	Jamie	18 East St.	Bellevue	WA	23232
<input checked="" type="checkbox"/>	Gonzales	Aaron	78 Western Ave.	San Jose	CA	10987
<input checked="" type="checkbox"/>	Richardson	Tomas	235 Spruce Way	Sonoma	CA	34512
<input checked="" type="checkbox"/>	Rodriguez	Amber	3456 Cedar Dr.	Boise	ID	87654
<input type="checkbox"/>	Henderson	Felix	1 Bamboo Terrace	Butte	MT	9876
<input checked="" type="checkbox"/>	Sullivan	Maria	45 Bush Lane	Sun Valley	ID	12124
<input checked="" type="checkbox"/>	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 online site. We value you as a customer and want to give you reduced prices. Please attend our site at [www.contoso.specialsales.com](http://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

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

# 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	
			<b>\$8.13</b>	
Category : Cereal (2)				
29	NWTC-82	Granola	\$4.00	20
43	NWTC-82	Hot Cereal	\$5.00	50
			Average	
			<b>\$4.50</b>	

● 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

No. ↓	Modified	Comments
3.0	10/4/2018 2:56 PM	Updated title and intro
2.0	9/26/2018 12:50 PM	Copy edit
1.0	5/18/2018 1:23 PM	

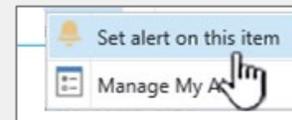
Work offline

Work in Access when SharePoint unavailable. Synchronize changes/resolve conflicts when SharePoint available.

Title	Created	Modified	Content Type
Contoso 2	9/21/2017 12:59	9/25/2017 15:29	Item
Contoso 1	9/21/2017 12:59		Item

Get alerts

Know when changes are made to values from email or text messages.



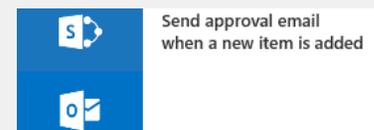
Mobile

Use a cell phone to view list items and do light editing.



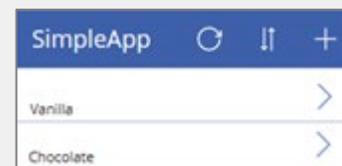
Power Automate

Set up a SharePoint linked list with an approval request or push notification.



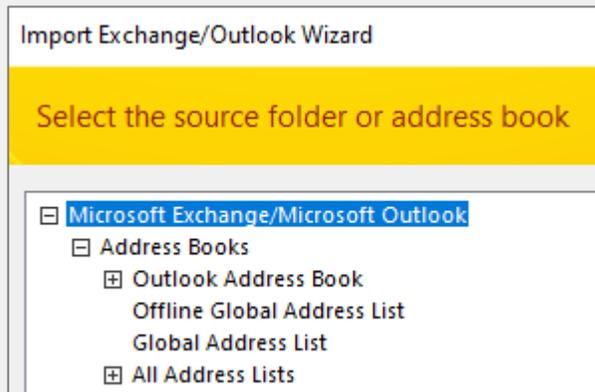
Power Apps

Customize a linked list form as a quick solution.

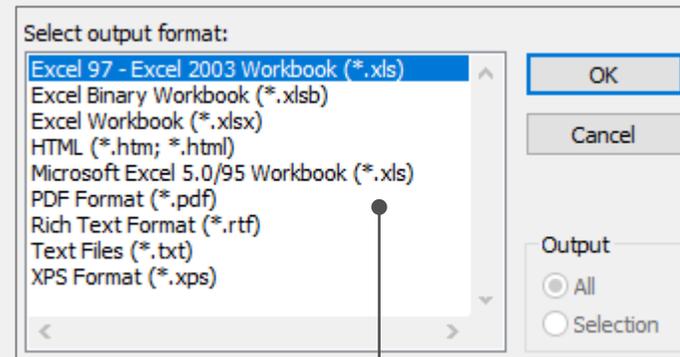


# Using Access with Outlook

## A Import contacts from Outlook ...



## Attach an Access object to an email message



Choose from a variety of formats.

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

Last Name	First Name	Job Title	Address	City
Bedecs	Anna	Owner	123 1st St.	Seattle
Axen	Thomas	Purchasing Rep	123 3rd St.	Los Angeles
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 Angeles
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

# 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

The screenshot shows the Outlook ribbon with the 'Task' tab selected. The 'Recurrence' button is highlighted with a red box. Below the ribbon, a task form is visible with the following fields:

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

A red box highlights the following text in the task form:

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

The screenshot shows an Access form titled 'Product Details' with two tabs: 'Product Details' (selected) and 'Order/Purchase History'. The form contains several data entry fields:

Product ID	1	Standard Cost	\$13.50
Name	Northwind Traders Chai	List Price	\$18.00
Product Code	NWTB-1	Reorder Level	10
Category	Beverages	Target Level	40
Supplier	[Dropdown]	Default Reorder Quantity	10
Quantity Per Unit	10 boxes x 20 bags	Discontinued	<input type="checkbox"/>

Below the fields are two large text areas: 'Description' and 'Attachments'. An 'Attachments' dialog box is open over the 'Attachments' field, displaying a list of files:

- AccessInfographic3.pptx
- Products.xlsx
- RedCheckMark.png
- StandardReply.docx

The dialog box includes buttons for 'Add...', 'Remove', 'Open', 'Save As...', 'Save All...', 'OK', and 'Cancel'.

● Add an Attachment control to a form or report.

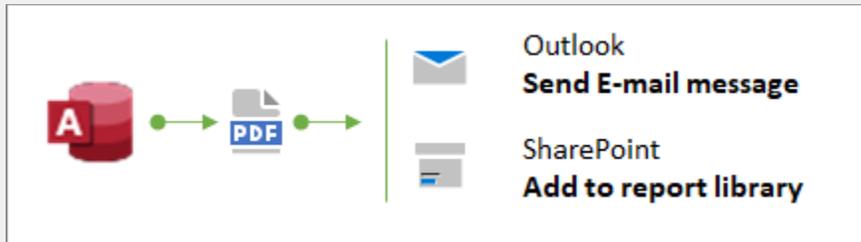
● Add and manage several attachments at once.

● 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



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

The screenshot shows a configuration dialog box with the following options:

- 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.

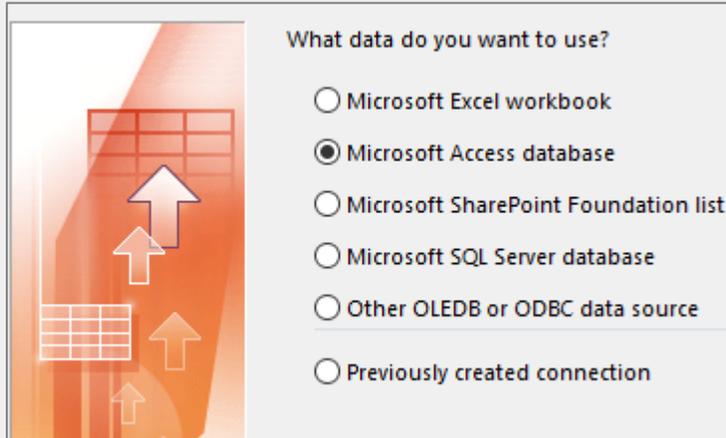
## Did you know?

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

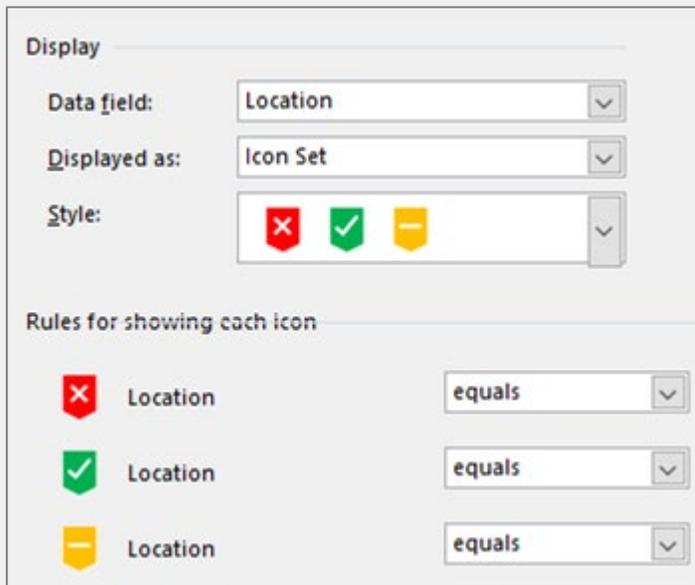
Select Access as your data source



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

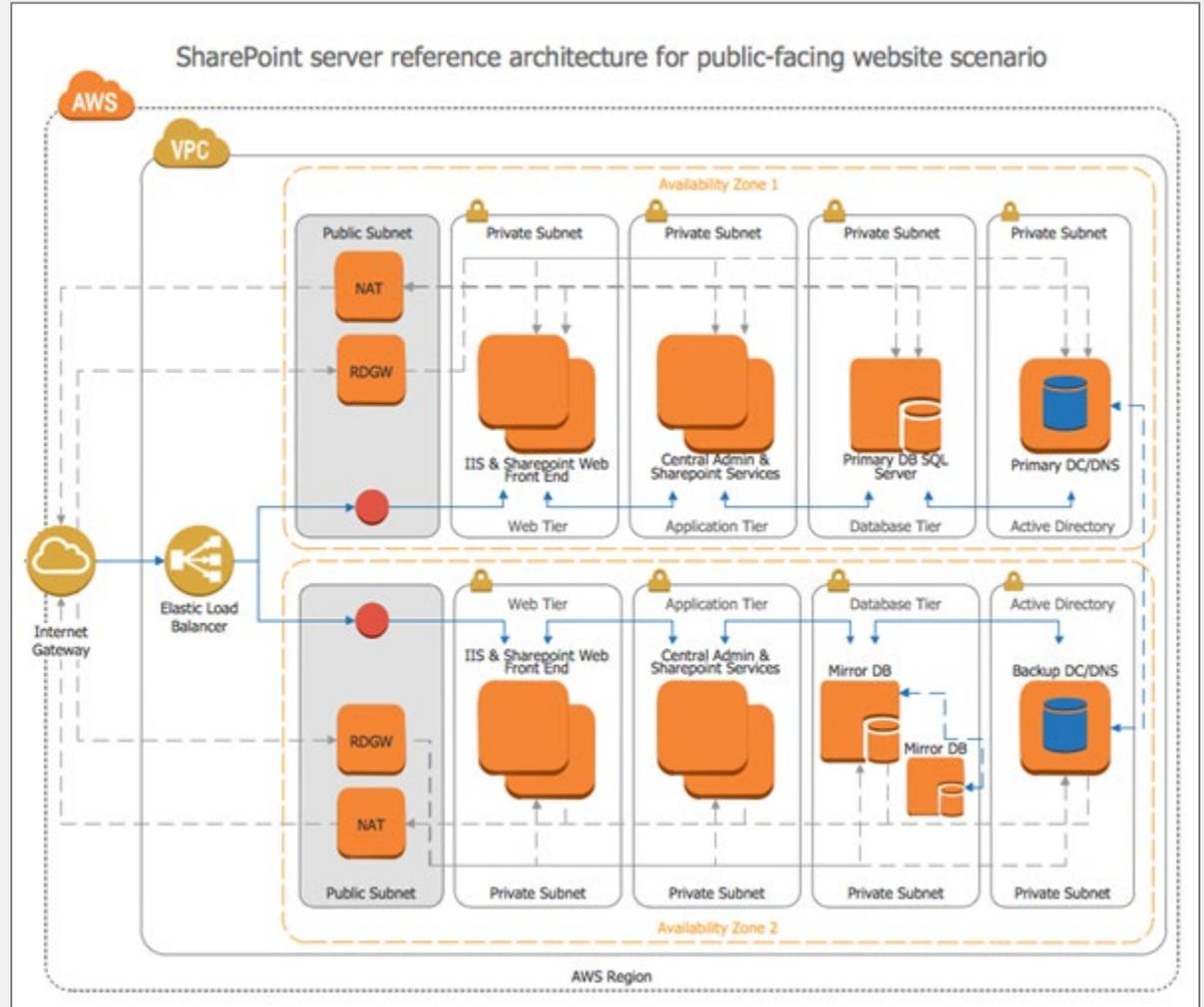
Displayed as: Icon Set

Style: [Red X] [Green Check] [Yellow Minus]

Rules for showing each icon

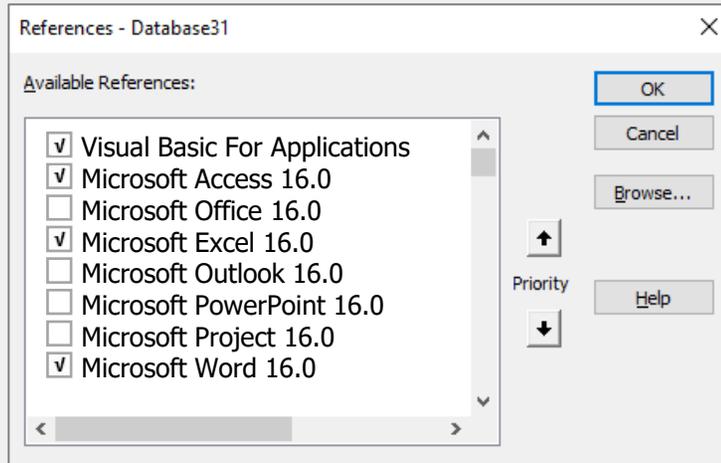
[Red X] Location	equals
[Green Check] Location	equals
[Yellow Minus] Location	equals

Create a diagram based on Access data and using data graphics



# Using Access VBA to reference Office Object Libraries

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



```
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](http://support.office.com/access)