

# ACCESS <<<<<<<

By Patricia Cox

## Working with SharePoint Lists

When using data from other sources, one option is to work with SharePoint lists. Many companies use SharePoint to collect data because it's a Web-based application that can be used to collect data in lists. It's also useful because enterprise resource management (ERM) and customer relationship management (CRM) software packages generally include some form of integration with SharePoint. This makes it a useful source of data for Access projects. SharePoint lists are a lot like spreadsheets. As a result, Access can connect to them if you are given privileges to access the list.

If you're using Access for a company project and need data, check with your IT department to see if your company is using SharePoint. If it is, find out what data is kept there. You may be surprised. You may even have your own ideas about how supplemental data can be input by users using SharePoint from a wide variety of locations and then linked to Access so that it can be analyzed.

A good strategy when using multiple software tools for data is to optimize the use of them by exploiting the strengths of each tool. SharePoint is

good at sharing over the Internet with secure access. Access is good at linking to this data, creating reports, and distributing them.

You can link to a SharePoint list, import it, or even export a table from Access to SharePoint to create a way for users to enter data. Then delete the table in Access and link to the one now stored in SharePoint.

### Link to SharePoint List

The process will be slightly different depending on which version of Access you're using. The feature is available in Access 2007 and later versions. On the External Data tab, look for the SharePoint option in the Import & Link group. (It might be in the More dropdown if it isn't immediately visible.) Follow the instructions you get once you click on the icon. You'll need permission to use the SharePoint list, which you can request from its owner. Talk with your IT department or the person that coordinates SharePoint in your organization. A SharePoint site address starts with http:// followed by the name of the server and then the path to the specific site on the server. You can generally see this path in

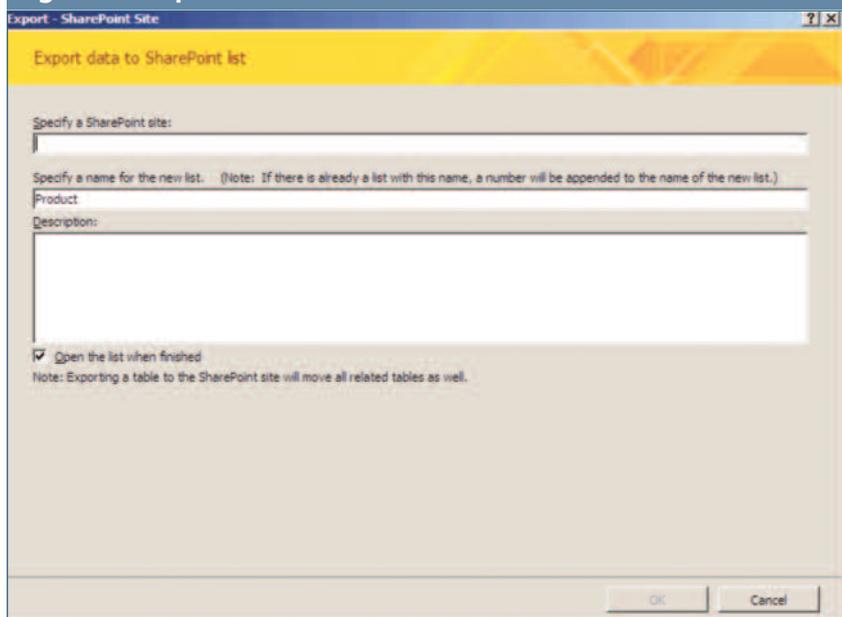
the browser when you are on the SharePoint site. Otherwise you can ask IT for the path.

Once you have your link established, any queries or reports that use the linked table will use the current data in the SharePoint list when they're run. You'll want to establish data entry deadlines with the staff who enter the data. You can also enter data directly from the Access linked table into SharePoint using a form or in Datasheet view of the table itself, but you won't be able to change the SharePoint structure.

### Import a SharePoint List

If you have a SharePoint list that could be used more easily in Access, you may want to import the list into your database rather than link to it. Usually SharePoint is used when people are in a wide variety of locations and need to enter data remotely. If a list was created that's only used by a limited group of users who can access a file folder location instead, then it may make more sense to import the list into Access and do all the work there. Sometimes you might begin using

**Figure 1. Export to SharePoint**



SharePoint and then decide to move the list to Access instead.

In these situations, the good news is you don't have to create the table. You can import it directly from SharePoint with the structure and data. Again, the process is slightly different depending on which version of Access you use. As with linking, it's available in Access 2007 and later versions. The icon is generally the same as when linking to a table. Click on

it and follow the directions. This time, choose import instead of link.

## Export to a SharePoint List

Sometimes you create a table in Access and then decide to use it in SharePoint instead. In that case, you would export the table to SharePoint. This time, go to the External Data tab and locate the icon in the Export group. The specific dialogs

will be different depending on your version of Access. Use the export wizard to guide your work (see Figure 1). You can save the export steps, but I generally don't—once I export the data, new data entry is done in SharePoint.

Exporting the table creates a way for users to enter data without having to go into Access. But you still may want to run queries and reports on the data. In that instance, you need to link to the new SharePoint list as described earlier. The bottom line is you can store your data in the easiest place for users to enter it and still use Access to report on it.

2015 will be a good year to explore how to use Access and SharePoint together to get the most out of each tool. **SF**

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