Publishing Data to a SharePoint Site

Export - SharePoint Site
Save Export Steps
Finished exporting 'Orders' to file 'http://sharepoint/test' successfully.
Do you want to save these export steps? This will allow you to quickly repeat the operation without using the wizard.
I▼ [Sage export steps]
Save as: Export-http://sharepoint/test_Orders
Description:
Create an Outlook Task. If you regularly repeat this saved operation, you can create an Outlook task that reminds you when it is time to repeat this operation. The Outlook task will include a Run Export button that runs the export operation in Access. C greate Outlook Task Hint: To make your task recur, open it in Outlook and click the Recurrence button.
Manage Data Takks Save Export Cancel

Figure 6 If you opt to save the export steps, Access prompts you for the appropriate information.

Publishing Data to a SharePoint Site

hen you publish data to a SharePoint site, you first copy it to the site and then create links to it from within Access. You can then run your queries, forms, and reports from within Access. The Move to SharePoint Site Wizard assists you with the process of creating the lists in SharePoint, maintaining the relationships between them and creating links to them within Access. Here's how the wizard works:

- 1. Click to select the External Data tab.
- 2. Click the Move to SharePoint button within the SharePoint Lists group. The Move to SharePoint Site Wizard appears (see Figure 7).

Nove to SharePoint Site Wizard	?)
Where do you want to move your data?	
This wizard moves all your data to a SharePoint site by creating a SharePoint list for each table and then inking each list back to your existing database.	ı
What SharePoint site do you want to use?	
✓ Save a copy of my database to the SharePoint site and create shortcuts to my Access forms and reports. Select a document library to save your database to: <u>Browse</u>	
Next> Cancel	

Figure 7 The Move to SharePoint Site Wizard walks you through the process of moving Access tables to SharePoint lists.

3. Designate the SharePoint site that you want to use (for example, http://sharepoint/test).

Publishing Data to a SharePoint Site

- 4. If you plan to run your forms and reports from within Access (rather than from within SharePoint), click Next. It is important to note that you either need to specify a document library (the default) or clear the Save a Copy checkbox. Otherwise, the next button will not be available. The process of creating the lists in SharePoint is quite involved and will probably take some time, especially if you have a large number of tables. You can click Stop at any time to abort the process.
- 5. When the process completes, the wizard should appear as in Figure 8. If there are warnings or errors, you should click to Show Details. Your screen will then appear as in Figure 9. Notice that the details show you the lists the wizard created, where the backup copy of your database is, and what table contains a log of issues encountered by the wizard.
- 6. Click Finish to complete the process. Notice that the Access tables appear with links to the SharePoint lists (see Figure 10).



Figure 8 The wizard provides you with information upon completion.



Figure 9 You can opt to view the details of everything that occurred during the process of creating SharePoint lists.

Publishing Data to a SharePoint Site



Figure 10 When you close the wizard, you will see that the database links to all the SharePoint lists.

It is important that you review the Move to SharePoint Site Issues table. This table lists all issues encountered during the upsizing process. The Move to SharePoint Site Issues table appears in Figure 11. Now that the SharePoint lists are created, you can view and edit list data from within Microsoft Access (see Figure 12). You can also run forms and reports based on that data (see Figures 13 and 14). You can also edit data directly from the SharePoint site (see Figure 15). Because the lists are linked, all changes are reflected both in Access and in SharePoint.

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Figure 11 It is important that you review the Site Issues table to determine everything that happened during the upsizing process.

Publishing Data to a SharePoint Site

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Invoice Data	🗾 Last Name 👻	First Name 🔻 E-mail	Addre - Company -	Job Title 🔹 Business Pr					
Reducts On Back Order	Andersen	Elizabeth	Company H	Purchasing Rep (123)456-78					
	Autier Miconi	Catherine	Company R	Purchasing Rep (123)456-78					
Shippers Extended	Axen	Thomas	Company C	Purchasing Rep (123)456-78					
Shipper Details	Bagel	Jean Philippe	Company Q	Owner (123)456-78					
😑 Shipper List	Bedecs	Anna	Company A	Owner (123)456-78					
Invoice	Edwards	John	Company L	Purchasing Mai (123)456-78					
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→ □□ Customers	Entin	Michael	Company W	Purchasing Mai (123)456-78					
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Customers Extended	Gratacos Solso	I Antonio	Company B	Owner (123)456-78					
Invoice Data	Grilo	Carlos	Company N	Purchasing Rep (123)456-78					
Product Orders	Hasselberg	Jonas	Company X	Owner (123)456-78					
🔁 Sales Analysis	Krschne	Peter	Company K	Purchasing Mai (123)456-78					
Top Ten Orders by Sales A	Kupkova	Helena	Company O	Purchasing Mai (123)456-78					
Active Orders Subform for	Lee	Christina	Company D	Purchasing Mai (123)456-78					
Active Orders Subform for	Lee	Soo Jung	Company CC	Purchasing Mai (123)456-78					
🖽 Customer Details	Li	George	Company T	Purchasing Mai (123)456-78					
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Figure 12 You can view and edit list data while in Datasheet view.

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Customers ×		<u>18</u>	Company	R	Catherine	Autier Miconi	
		3	Company	С	Thomas	Axen	
Customers Extended		<u>17</u>	Company	Q	Jean Philippe	Bagel	
Invoice Data		1	Company	A	Anna	Bedecs	
Product Orders		<u>12</u>	Company	L	John	Edwards	
📑 Sales Analysis		<u>19</u>	Company	S	Alexander	Eggerer	
Top Ten Orders by Sales A		<u>23</u>	Company	W	Michael	Entin	
Active Orders Subform for	-	16	Company	P	Daniel	Goldschmidt	
Customer Dataile		2	Company	В	Antonio	Gratacos Solsona	
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Publishing Data to a SharePoint Site

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Customer Details File As Name Address City	
G Customer List A	
Elizabeth Andersen 123 Any Street Any City	
Sales Analysis Form Catherine Autier Miconi 123 Any Street Any City	
Customer Address Book Thomas Axen 123 Any Street Any City	
Customer Phone Book	
Top Ten Biggest Orders Jean Philippe Bagel 123 Any Street Any City	
🖾 clsPurchaseOrders Anna Bedecs 123 Any Street Any City	
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Orders	
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Figure 14 You can view list data using an Access report.

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Test Pages				This List	•		۶
Home Test Pages						Site Acti	ons •
8	Feam Site > Test Pages Customers	> Customers					
View All Site Content	New • Actions •	Settings 👻			View:	All contacts	•
Documents	Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address	_ID
 Shared Documents 	Andersen NEW	Elizabeth	Company H	(123)456-7890			8
Pictures	Autier Miconi 🖁 NEW	Catherine	Company R	(123)456-7890			18
Lists	Axen I NEW	Thomas	Company C	(123)456-7890			3
Calendar	Bagel I NEW	Jean Philippe	Company Q	(123)456-7890			17
 Tasks 	Bedecs I NEW	Anna	Company A	(123)456-7890			1
Discussions	Edwards I NEW	John	Company L	(123)456-7890			12
 Team Discussion 	Eggerer ! NEW	Alexander	Company S	(123)456-7890			19
Surveys	Entin I NEW	Michael	Company W	(123)456-7890			23
Sites	Goldschmidt ! NEW	Daniel	Company P	(123)456-7890			16
People and Groups	Gratacos Solsona ! NE	w Antonio	Company B	(123)456-7890			2
Recycle Bin	Grilo I NEW	Carlos	Company N	(123)456-7890			14
	Hasselberg NEW	Jonas	Company X	(123)456-7890			24
	Krschne ! NEW	Peter	Company K	(123)456-7890			11
	Kupkova ! NEW	Helena	Company O	(123)456-7890			15
	Lee I NEW	Christina	Company D	(123)456-7890			4
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Figure 15 You can modify list data via the SharePoint site.

Now that the data is in SharePoint lists, you can fully manage the data from the SharePoint site. This means that you can apply various levels of security, manage versions of the data, and retrieve deleted data from the Recycle Bin on the SharePoint site. You can even create alerts so that certain people know when someone has changed the data.

Opening Access Forms and Reports from a SharePoint Site

How the Wizard Moves Data to the SharePoint Site

When the wizard runs, it attempts to match each Access table to a template available on the SharePoint site. If it finds a template, it creates the SharePoint list based on that template. If it can't find an appropriate template, it creates a custom list on the SharePoint site. During the process, it creates a backup of your original database and then creates links to the lists on the SharePoint site.

Opening Access Forms and Reports from a SharePoint Site

n the preceding section, we published data to a SharePoint site. When we ran the wizard, we did not opt to save a copy of the database to the SharePoint site and create shortcuts to Access forms and reports. Instead, we ran all the queries, forms, and reports from within Microsoft Access. In this section, we tell the wizard to save a copy of the database to the SharePoint site and create shortcuts to its forms and reports (see Figure 16). To do this, you must select Browse and indicate the location of the document library where you want to save your database (see Figure 17). After you have saved your database to the document library, you can easily launch your forms and reports from the SharePoint site. Here are the steps involved:



Figure 16 When you publish data to a SharePoint site, you can opt to create shortcuts to Access forms and reports.