

SECTION 4

Publishing Data to a SharePoint Site

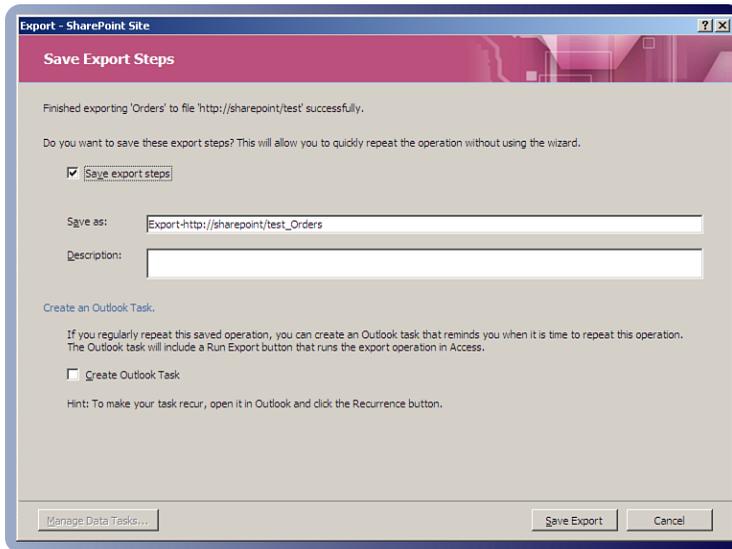


Figure 6 If you opt to save the export steps, Access prompts you for the appropriate information.

Publishing Data to a SharePoint Site

When 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).

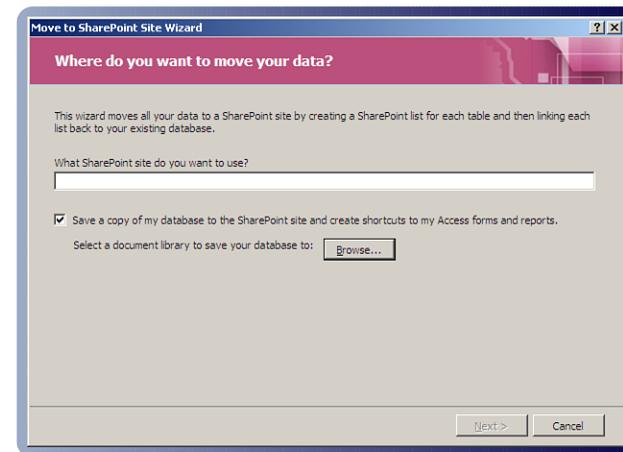


Figure 7 The Move to SharePoint Site Wizard walks you through the process of moving Access tables to SharePoint lists.

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

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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 check-box. 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).

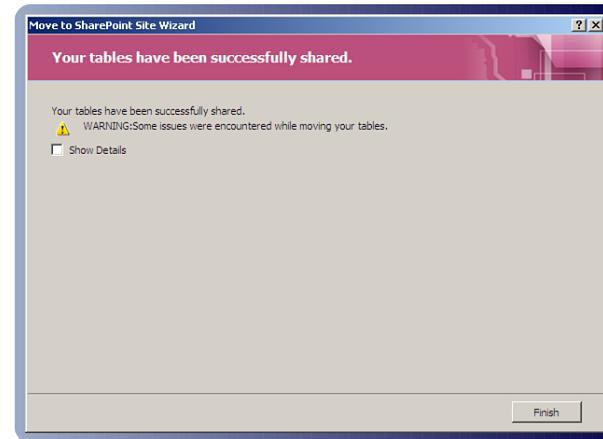


Figure 8 The wizard provides you with information upon completion.

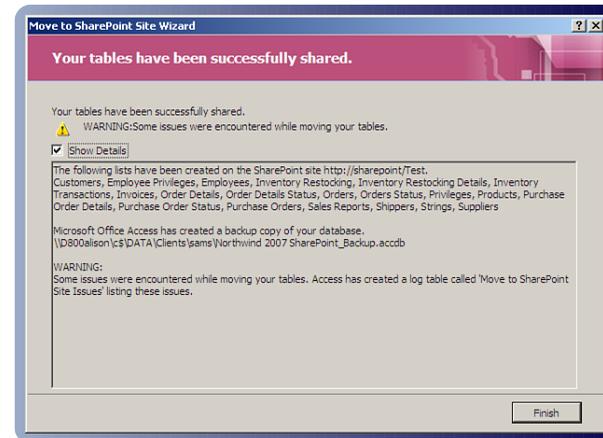


Figure 9 You can opt to view the details of everything that occurred during the process of creating SharePoint lists.

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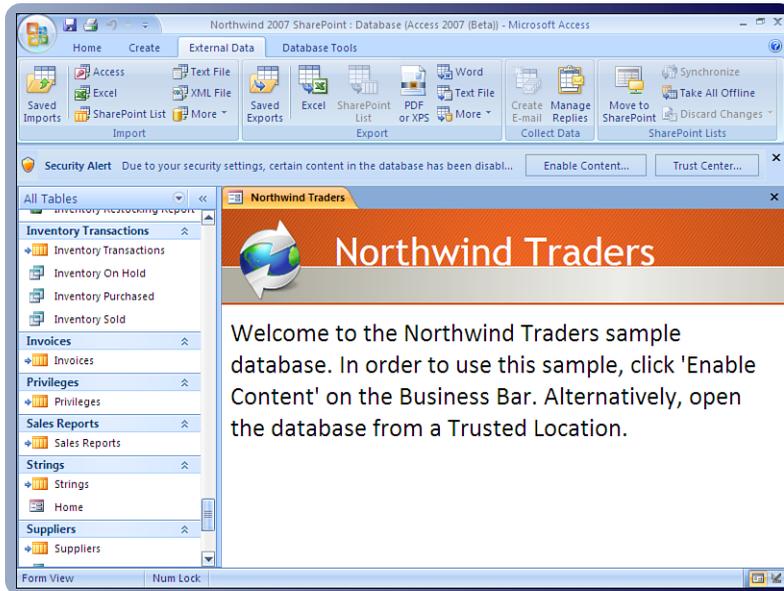


Figure 10 When you close the wizard, you will see that the database links to all the SharePoint lists.

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.

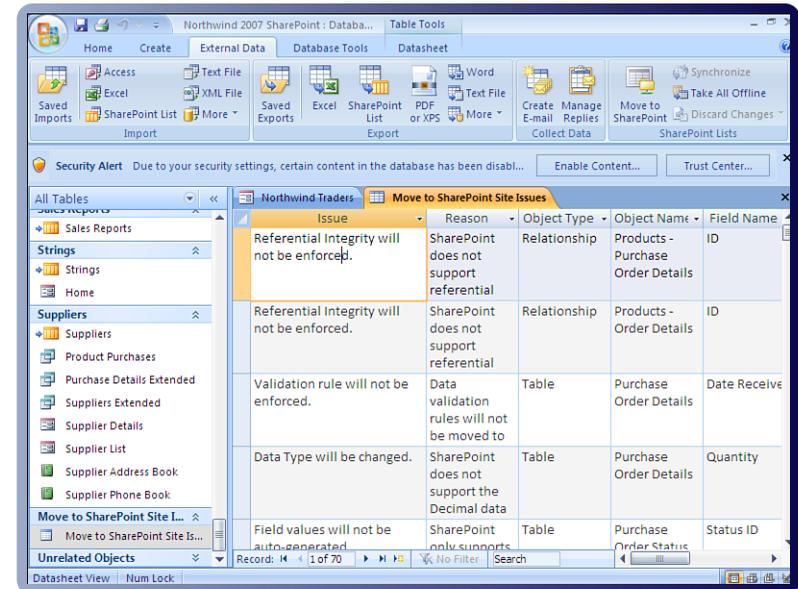


Figure 11 It is important that you review the Site Issues table to determine everything that happened during the upsizing process.

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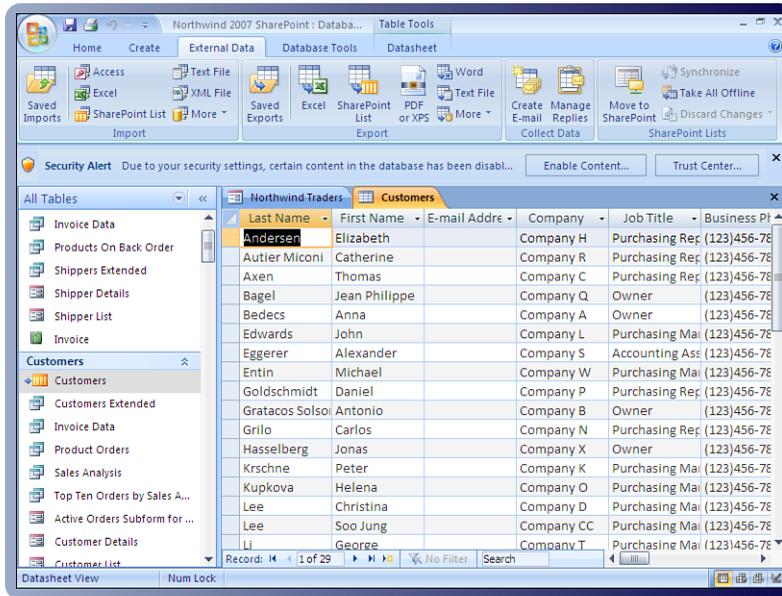


Figure 12 You can view and edit list data while in Datasheet view.

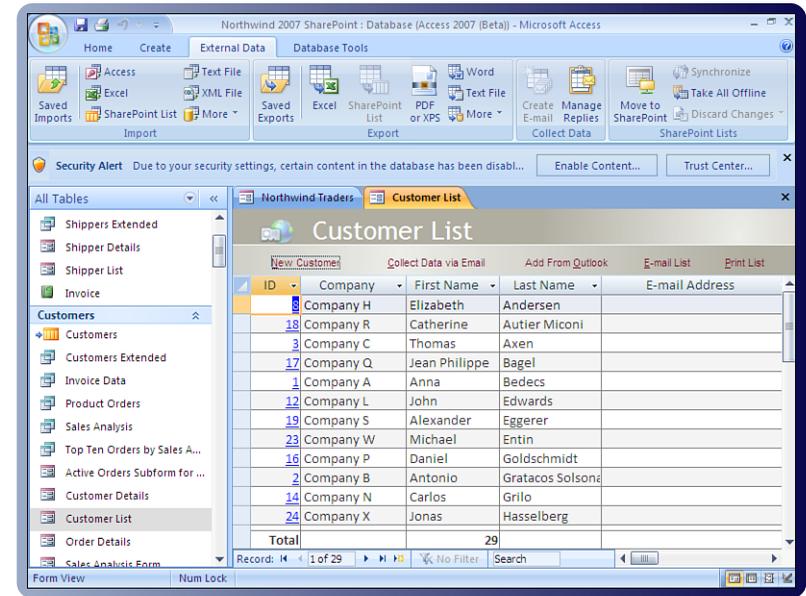


Figure 13 You can view and edit data using an Access form.

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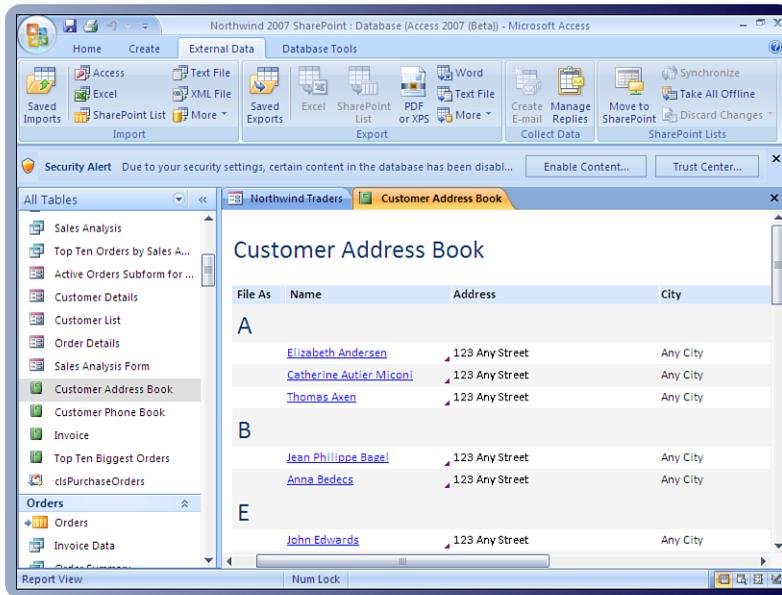


Figure 14 You can view list data using an Access report.

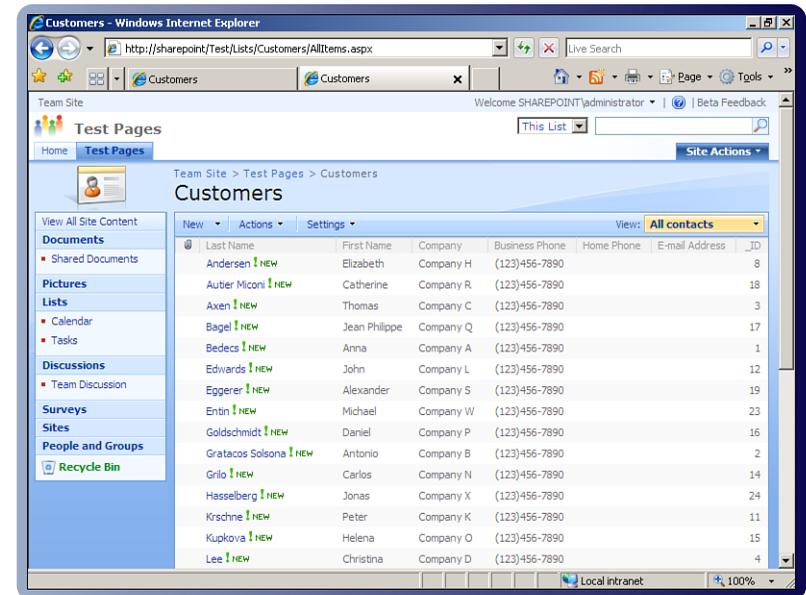


Figure 15 You can modify list data via the SharePoint site.

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

In 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:

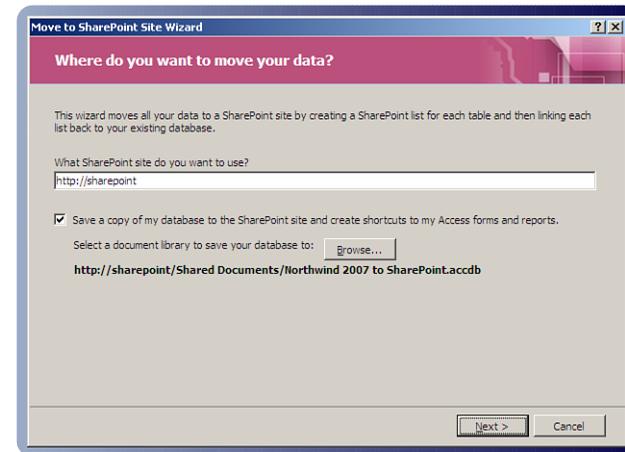


Figure 16 When you publish data to a SharePoint site, you can opt to create shortcuts to Access forms and reports.