

Moving Data Between Access and Excel

This document provides basic techniques for exchanging data between Microsoft Access and Excel.

Transferring from Excel to Access

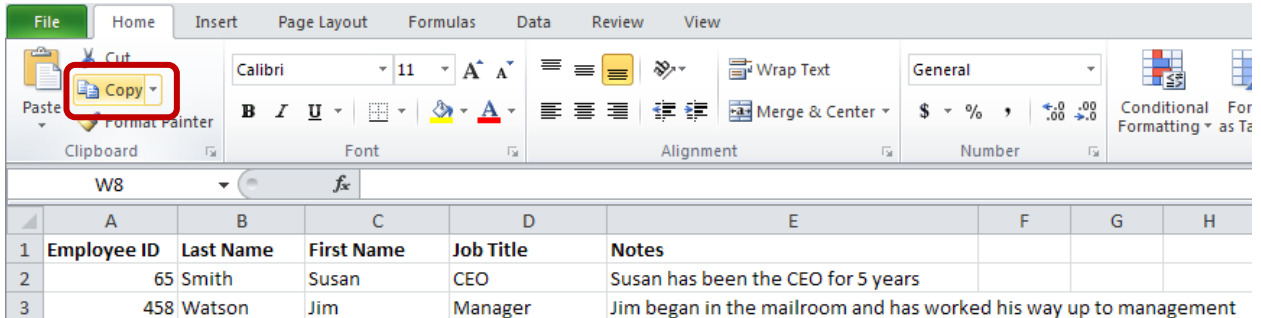
To bring data into Access from Excel, you can:

- Copy data from an Excel worksheet and paste it into an Access datasheet. This is the best process when the data exchange is temporary.
- Import an Excel worksheet into an Access table. This is the best process when the data exchange is periodic.
- Link to an Excel worksheet from an Access table. (This process will be addressed in another session.)

Copy Excel Data into Access

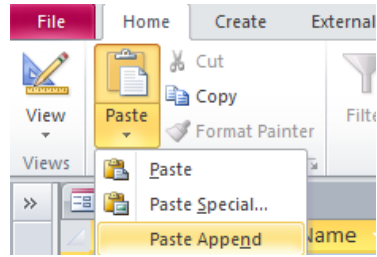
From Excel, you can copy data in a worksheet view and then paste the data into an Access datasheet. If you paste data from multiple fields in a worksheet to a datasheet, make sure that the columns match the order of the data that you want to copy.

1. Start Excel, and then open the worksheet that contains the data that you want to copy.
2. Select the rows that you want to copy.
3. On the **Home** tab, in the **Clipboard** group, click **Copy**.



4. Start Access, and then open the table, query, or form in which you want to paste the rows.
5. On the **Home** tab, click **View**, and then click **Datasheet View**.
6. Do one of the following:
 - To replace records, select those records, and then on the **Home** tab, in the **Clipboard** group, click **Paste**.

- To append the data as new records, on the **Home** tab, in the **Clipboard** group, click **Paste Append**.



- ✓ Keep in mind that most failures during append operations occur because the source data does not match the structure and field settings of the destination table. If Paste Append does not work for you, review the table and field properties in Design view. Make any necessary changes, and then try appending again.

Import Excel Data into Access

To store data from Excel in an Access database, and then use and maintain the data in Access from then on, you can import the data. When you import data, Access stores the data in a new or existing table without altering the data in Excel. You can import only one worksheet at a time during an import operation. To import data from multiple worksheets, repeat the import operation for each worksheet.

The following are common scenarios for importing Excel data into Access:

- You have been using Excel, but you now want to use Access to work with this data. As such, you want to move the data in your Excel worksheets into one or more new Access databases.
- Your department uses Access, but you occasionally receive data in Excel format that must be merged with your Access databases. You want to import these Excel worksheets into your database as you receive them.
- You use Access to manage your data, but the weekly reports that you receive from the rest of your team are Excel workbooks. You would like to streamline the import process to ensure that data is imported every week at a specific time into your database.

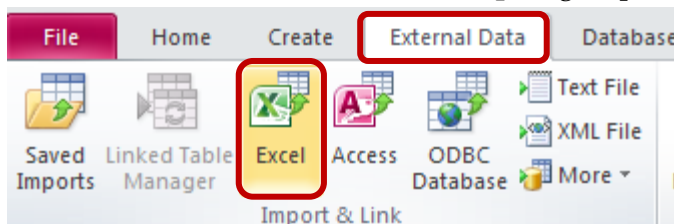
Prepare the Excel worksheet for import:

- The number of columns that you want to import cannot exceed 255, because Access does not support more than 255 fields in a table.
- It is a good practice to include only the rows and columns that you want to import in the source worksheet or named range.
- Ensure that the cells are in tabular format. If the worksheet or named range includes merged cells, the contents of the cell are placed in the field that corresponds to the leftmost column, and the other fields are left blank.

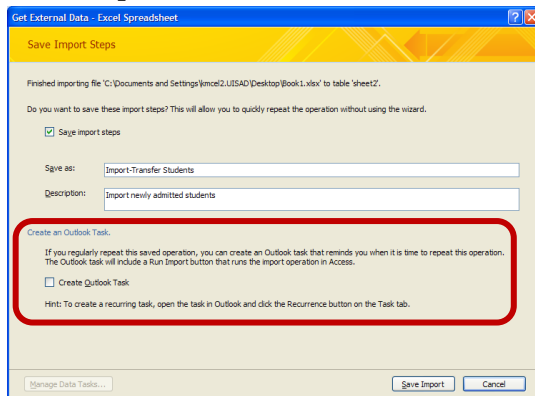
- Delete all unnecessary blank columns and blank rows in the worksheet or range.
- If one or more cells in the worksheet or range contain error values, such as **#NUM** and **#DIV**, correct them before you start the import operation.
- To avoid errors during importing, ensure that each column contains the same type of data in every row. Access scans the first eight rows to determine the data type of the fields in the table. Also, it is a good practice to format each column in Excel and assign a specific data format to each column before you start the import operation.
- If the first row in the worksheet or named range contains the names of the columns, you can specify that Access treat the data in the first row as field names during the import operation.

To import the worksheet,

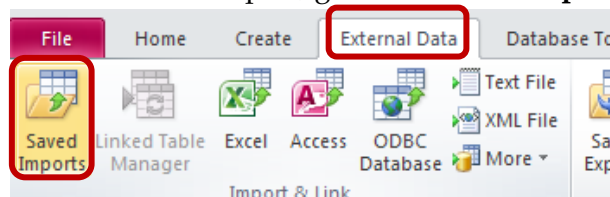
1. Open the Access database.
2. From the **External Data** tab, in the **Import** group, click **Excel**.



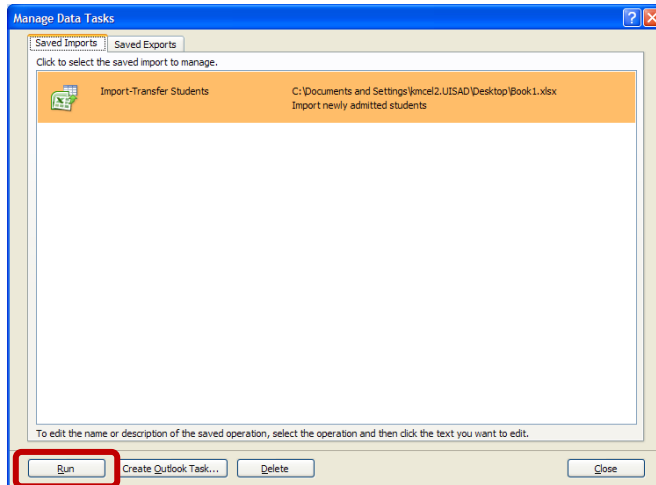
3. Browse to the Excel spreadsheet.
4. Follow the onscreen steps for the Import Spreadsheet Wizard.
5. Note the last screen provides an option for saving the import specifications, allowing you to repeat the operation at any time. A specification contains all the information Access needs to repeat the operation without you having to provide any input. There is also an option to create an Outlook task to remind you to complete future imports.



- a. To run a saved import, go to the **Saved Imports** button on the **External Data** tab.



- b. Select the appropriate import action, and click **Run**.



Please note that you cannot save an Excel workbook as an Access database. Neither Excel nor Access provides functionality to create an Access database from Excel data.

Transferring Data from Access to Excel

To bring data into Excel from Access, you can:

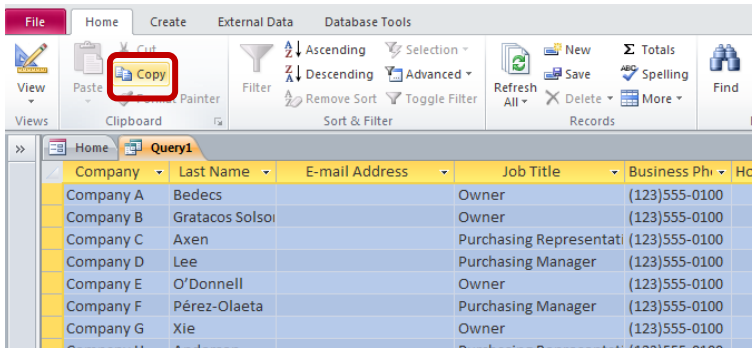
- Copy data from an Access datasheet and paste it into an Excel worksheet. This is the best process when the data exchange is temporary.
- Export Access data into an Excel worksheet. This is the best process when the data exchange is periodic.
- Connect to an Access database from an Excel worksheet. (This process will be addressed in another session.)

Copy Access Data into Excel

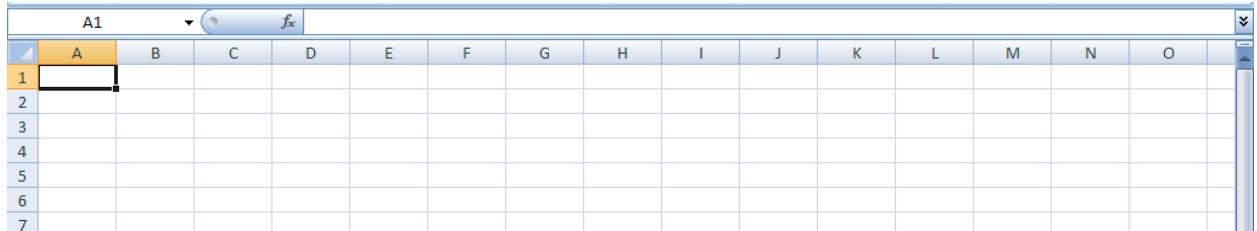
From Access, you can copy data from a datasheet view and then paste the data into an Excel worksheet.

1. Start Access, and then open the table, query, or form that contains the records that you want to copy.
2. On the **Home** tab, click **View**, and then click **Datasheet View**.

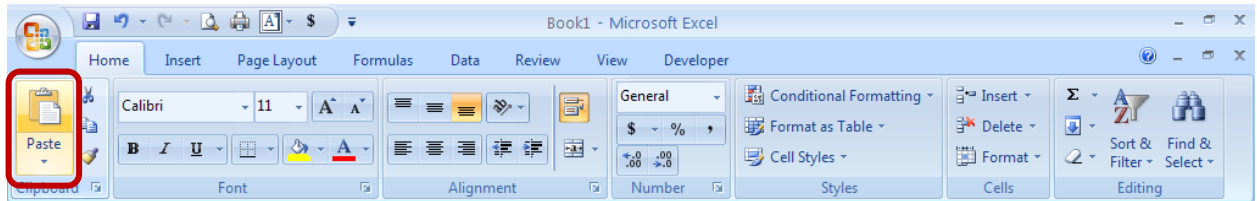
3. Select the records that you want to copy. On the **Home** tab, in the **Clipboard** group, click **Copy**.



4. Start Excel, and then open the worksheet into which you want to paste the data.
5. Click in the upper-left corner of the worksheet area where you want the first field name to appear. To ensure that the copied records do not replace existing records, make sure that the worksheet has no data below or to the right of the cell that you click.



6. On the **Home** tab, in the **Clipboard** group, click **Paste**.



Export Access Data to Excel

When you export data, Access creates a copy of the selected data or database object, and then stores the copy in an Excel worksheet. By using the Export Wizard in Access, you can export an Access database object, such as a table, query, or form, or selected records in a view into an Excel worksheet. When you perform an export operation, you can save the details for future use, and even schedule the export operation to run automatically at specified intervals.

The following are common scenarios for exporting data from Access to Excel:

- Your department uses both Access and Excel to work with data. You store the data in Access databases, but you use Excel to analyze the data and to distribute the results of your analysis. Your team currently exports data to Excel when they need to, but you would like to make this process more efficient.

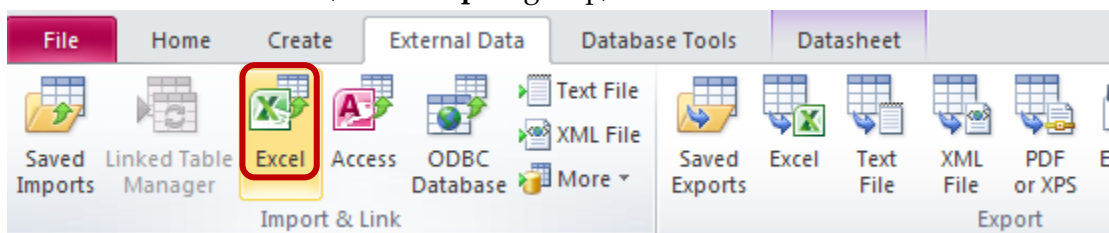
- You are a long-time user of Access, but your supervisor prefers to view reports in Excel. At regular intervals, you do the work of copying the data into Excel, but you would like to automate this process to save yourself time.

What to know before exporting to Excel:

- Fields that support multiple values are exported as a list of values separated by semicolons (;).
- Graphical elements (such as logos, contents of OLE object fields, and attachments that are part of the source data) are not exported. They will need to be added to the worksheet manually after you complete the export operation.
- Null values in the resulting worksheet are sometimes replaced by the data that should be in the next column.
- Date values earlier than January 1, 1900 are not exported. The corresponding cells in the worksheet will contain a null value.
- Expressions that are used to calculate values are not exported to Excel. Only the results of the calculations are exported. You will need to manually add the formula after completing the export operation.
- You might see the value # in a column that corresponds to a Yes/No field in a form. This can be the result of starting the export operation from the Navigation Pane or in Form view. To resolve this issue, open the form in Datasheet view before exporting the data.

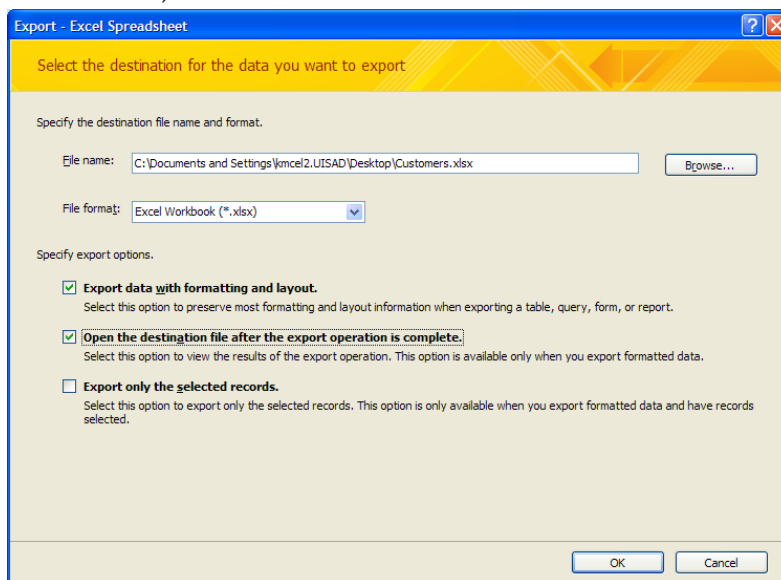
To export a database object,

1. In the source database, if you want to export only a portion of a table, query, or form, open the object and select the records you want.
2. On the **External Data** tab, in the **Export** group, click **Excel**.

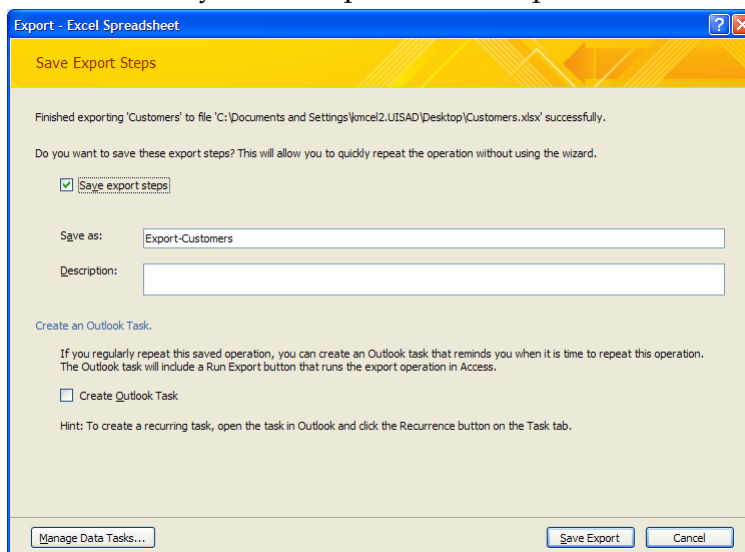


3. Complete the options available in the **Export - Excel Spreadsheet** dialog box and click **OK**.
 - a. Enter the name for the Excel workbook.
 - b. Select the appropriate file format from the **File Format** box.
 - c. If you are exporting a table or a query, and you want to export formatted data, select **Export data with formatting and layout**.
 - ✓ If you are exporting a form, this option is always selected but unavailable (it appears dimmed).

- d. To view the Excel workbook after the export operation is complete, select the **Open the destination file after the export operation is complete** check box.
- e. If the source object is open, and if you selected one or more records in the view before starting the export operation, you can select **Export only the selected records**. However, if you want to export all of the records displayed in the view, leave this check box cleared. (This check box remains unavailable if no records are selected.)

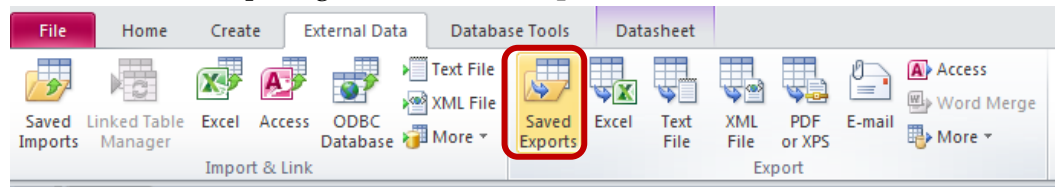


- 4. Access then displays a dialog box in which you can create a specification that uses the details from the export operation. Click **Yes** to save the details of the export operation for future use. Saving the details helps you repeat the same export operation in the future without having to step through the wizard each time.
 - a. In the **Save as** box, type a name for the export specification. Type a description in the **Description** box, if desired. There is also an option to create an Outlook task to remind you to complete future exports.



[Not for Circulation]

- b. To run a saved import, go to the **Saved Exports** button on the **External Data** tab.



- c. Select the appropriate export action, and click **Run**.

