

**Microsoft**  
**Access 2007**  
**Importing And**  
**Exporting Data**

University of California

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**Berkeley**

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**Haas School of Business**



DASH DESIGNS CONSULTING

Technology Training and Consulting Services

# **Microsoft Access 2007 Importing And Exporting Data For The Haas School of Business, University of California**

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# **IMPORTING AND EXPORTING DATA WITH MICROSOFT ACCESS 2007**

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# Importing Data Into Access

Reference Database: *My Project Database.accdb*

## IMPORTING AND EXPORTING DATA

Importing data from other applications is an efficient method of setting up tables where that data is already available. The import process allows you to import records into a new table or add records to an existing one. Although, in order to add records to an existing table, the fields to which you are importing must already match the fields from the source file.

Access allows you to import from a variety of applications. Those include databases such as **FoxPro, Paradox, and Dbase**, as well as spreadsheet programs like **Excel or Lotus 123**. Microsoft Excel is a good **intermediary** application between Access and other program files that Access cannot directly read.

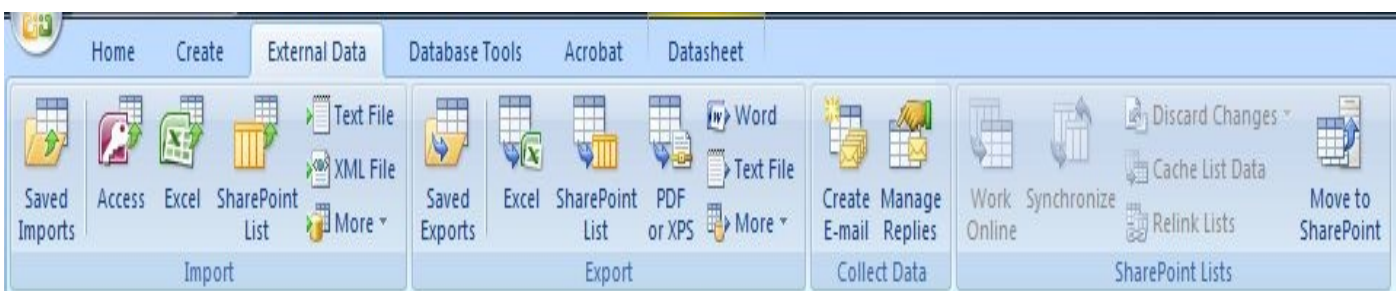
Once the data is in Access, you can edit records, add new records, modify the design of the table, and create queries, forms, and reports based on that new data.

In addition, you can use the **Link Table** option to bring data into Access while still leaving it in its “native” format (i.e., Excel). In this way you can create queries, forms, and reports, as well as, perform data entry while other users can still use the data in their original program. A link is established so that any data changes will reflect in Access as well as in the original program.

In addition to importing, data can also be exported from Access to a variety of formats such as Excel, Text, PDF, as well as to other Access databases.

The **External Data Tab** in the ribbon of Access contains commands to manage importing and exporting.

External Data Tab in Microsoft Access Database

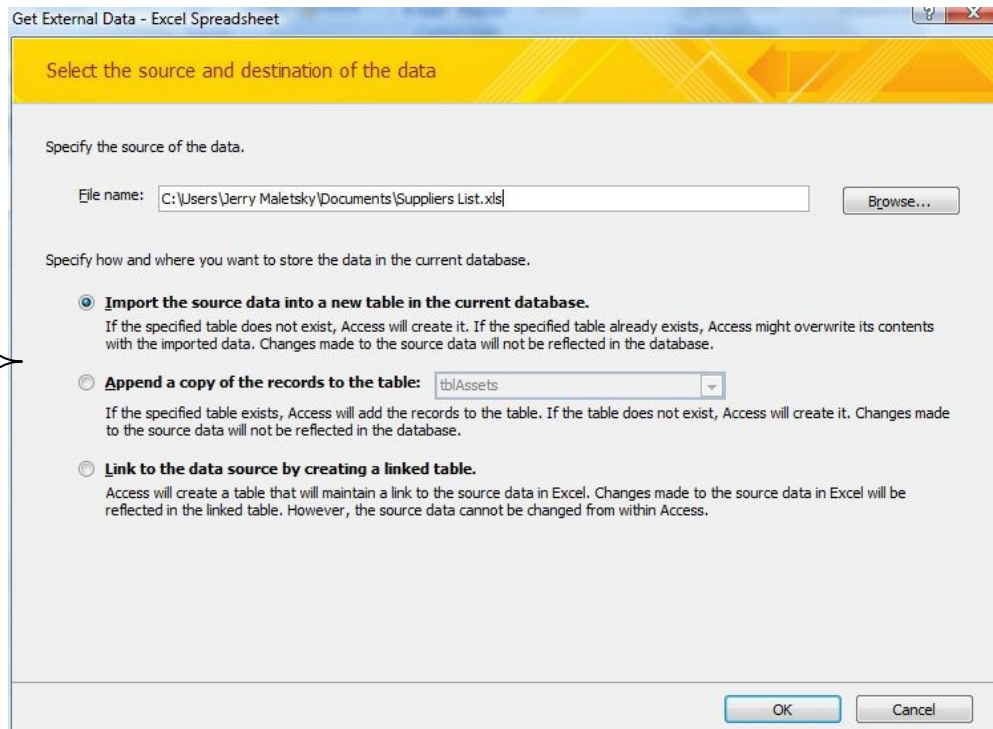


## IMPORTING DATA INTO ACCESS

### Steps:

- ⇒ Open the database for which you want to import data
- ⇒ Click the **External Data** tab in the Access command ribbon
- ⇒ In the Import Group, select the type of file format that matches the data from which you want to import (i.e. Excel)
- ⇒ In the Get External Data dialog box, browse to the location that contains the source data file
- ⇒ After choosing the file, select the option that best fits the method of bringing the data into your database (i.e. **Import, Append, or Link**)
- ⇒ Click OK to start the Import Wizard process

Get External  
Data Dialog  
Box Options



## IMPORT WIZARD PROCESS

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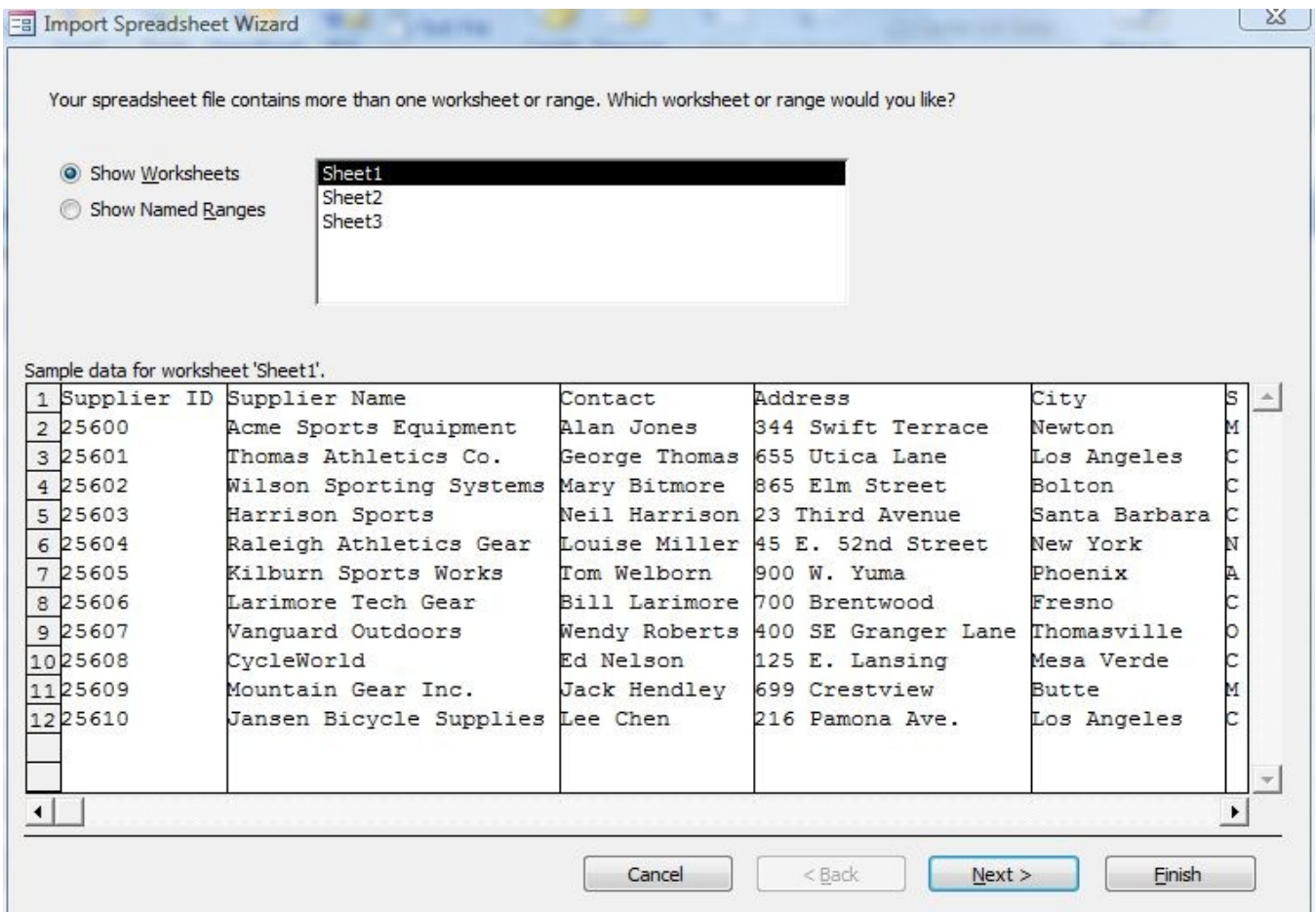
Once the source file is chosen and the preferred import option is selected, the Import Wizard dialog box process begins. This steps you through a series of options that can be placed on the imported data. The ranges from allowing the data to be imported by the entire sheet or a named range, whether the top row of the data contains the field headings, designating a primary key field, and whether any fields should be excluded from importing. Once the process is complete, the imported data will be available as a table in the Access database.

### Steps:

- ⇒ In the first Import Wizard Box, select whether to import the Entire Sheet (Show Worksheets) or by a Named Range (Show Named Ranges)
- ⇒ Click Next
- ⇒ In the second Import Wizard Box, confirm that the first row of the data range contains the field headings (First Row Contains Column Headings)
- ⇒ Click Next
- ⇒ In the third Import Wizard Box, click into any fields not to be imported and select the checkbox option... Do Not Import Field (Skip)
- ⇒ Click Next
- ⇒ In the fourth Import Wizard Box, decide whether a primary key designation should be added by Access, manually selected by you, or not to designate a primary key
- ⇒ Click Next
- ⇒ In the fifth Import Wizard Box, specify a name for the new table
- ⇒ Click Next
- ⇒ In the last Import Wizard Box, confirm that Access has completed the import process and whether you want to save the import information (to run without using the wizard process again)
- ⇒ Click Finish

**IMPORTING DATA INTO ACCESS**

Import Wizard Box #1



⇒ Select whether to import the Entire Sheet (Show Worksheets) or by a Named Range (Show Named Ranges)

## IMPORTING DATA INTO ACCESS

### Import Wizard Box #2

Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

First Row Contains Column Headings

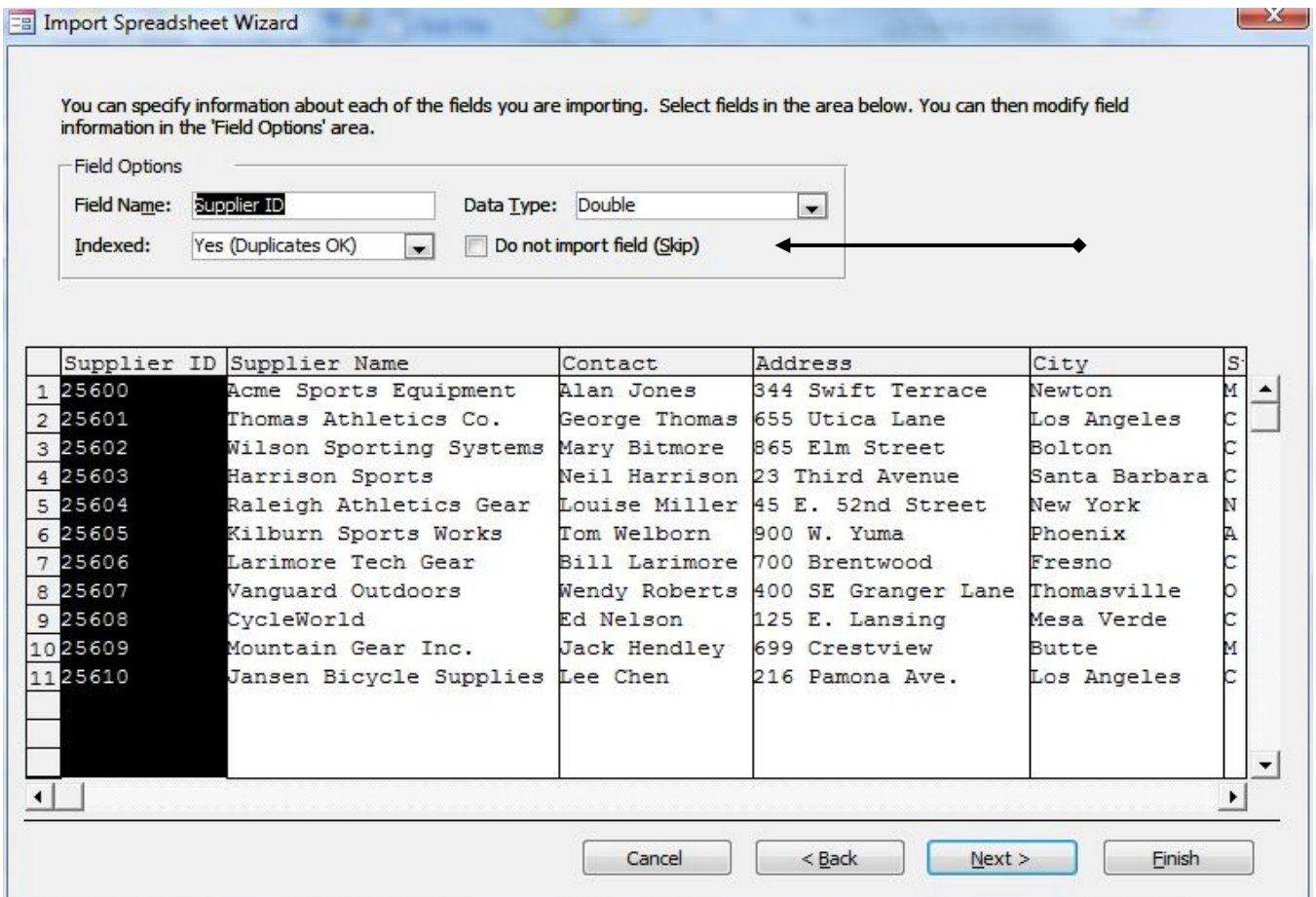
	Supplier ID	Supplier Name	Contact	Address	City	S
1	25600	Acme Sports Equipment	Alan Jones	344 Swift Terrace	Newton	M
2	25601	Thomas Athletics Co.	George Thomas	655 Utica Lane	Los Angeles	C
3	25602	Wilson Sporting Systems	Mary Bitmore	865 Elm Street	Bolton	C
4	25603	Harrison Sports	Neil Harrison	23 Third Avenue	Santa Barbara	C
5	25604	Raleigh Athletics Gear	Louise Miller	45 E. 52nd Street	New York	N
6	25605	Kilburn Sports Works	Tom Welborn	900 W. Yuma	Phoenix	A
7	25606	Larimore Tech Gear	Bill Larimore	700 Brentwood	Fresno	C
8	25607	Vanguard Outdoors	Wendy Roberts	400 SE Granger Lane	Thomasville	O
9	25608	CycleWorld	Ed Nelson	125 E. Lansing	Mesa Verde	C
10	25609	Mountain Gear Inc.	Jack Hendley	699 Crestview	Butte	M
11	25610	Jansen Bicycle Supplies	Lee Chen	216 Pamona Ave.	Los Angeles	C

Cancel < Back Next > Finish

⇒ Confirm that the first row of the data range contains the field headings (First Row Contains Column Headings)

**IMPORTING DATA INTO ACCESS**

Import Wizard Box #3



⇒ Click into any fields not to be imported and select the checkbox option... Do Not Import Field (Skip)

## IMPORTING DATA INTO ACCESS

### Import Wizard Box #4

Import Spreadsheet Wizard

Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

Let Access add primary key.  
 Choose my own primary key. Supplier ID  
 No primary key.

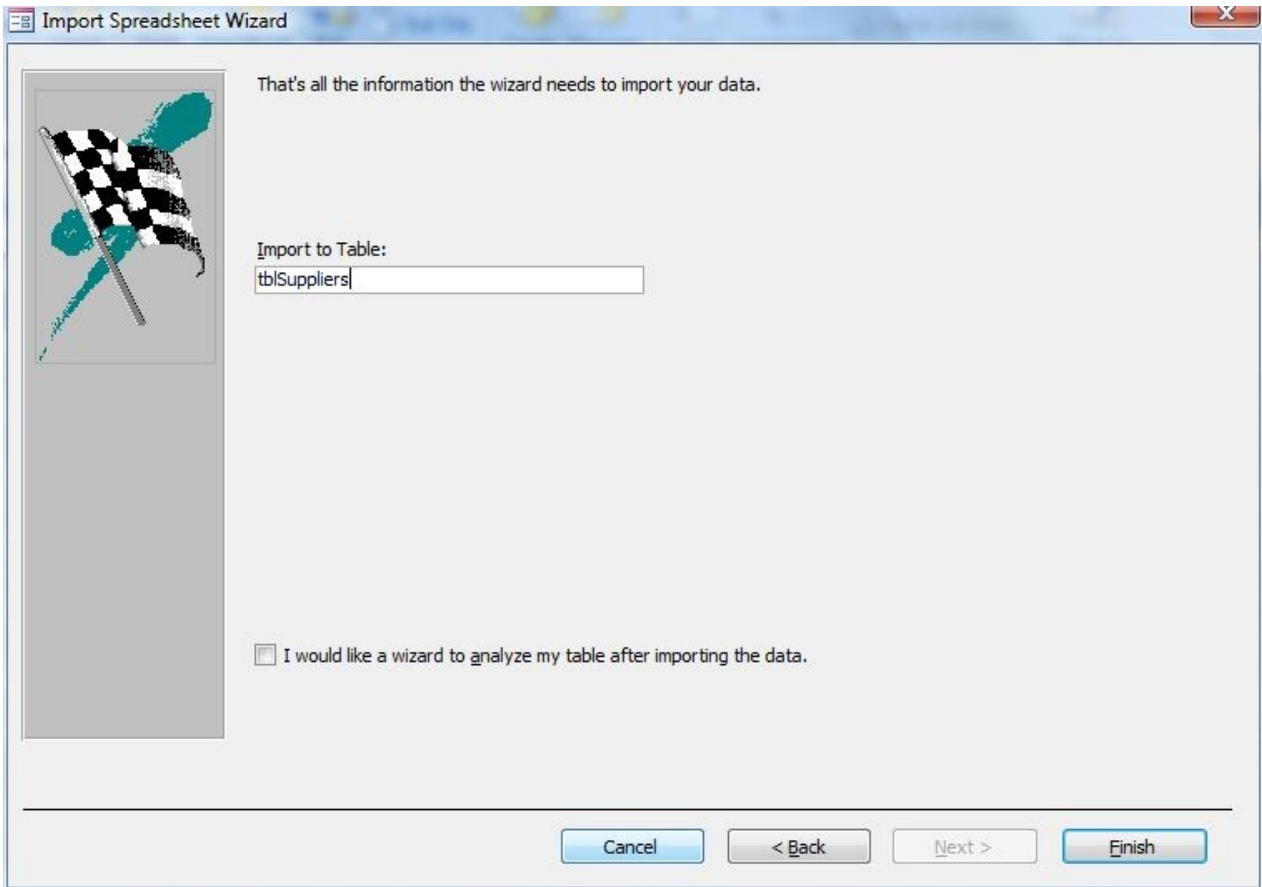
	Supplier ID	Supplier Name	Contact	Address	City	S
1	25600	Acme Sports Equipment	Alan Jones	344 Swift Terrace	Newton	M
2	25601	Thomas Athletics Co.	George Thomas	655 Utica Lane	Los Angeles	C
3	25602	Wilson Sporting Systems	Mary Bitmore	865 Elm Street	Bolton	C
4	25603	Harrison Sports	Neil Harrison	23 Third Avenue	Santa Barbara	C
5	25604	Raleigh Athletics Gear	Louise Miller	45 E. 52nd Street	New York	N
6	25605	Kilburn Sports Works	Tom Welborn	900 W. Yuma	Phoenix	A
7	25606	Larimore Tech Gear	Bill Larimore	700 Brentwood	Fresno	C
8	25607	Vanguard Outdoors	Wendy Roberts	400 SE Granger Lane	Thomasville	O
9	25608	CycleWorld	Ed Nelson	125 E. Lansing	Mesa Verde	C
10	25609	Mountain Gear Inc.	Jack Hendley	699 Crestview	Butte	M
11	25610	Jansen Bicycle Supplies	Lee Chen	216 Pamona Ave.	Los Angeles	C

Cancel < Back Next > Finish

⇒ Decide whether a primary key designation should be added by Access, manually selected by you, or not to designate a primary key

## IMPORTING DATA INTO ACCESS

### Import Wizard Box #5

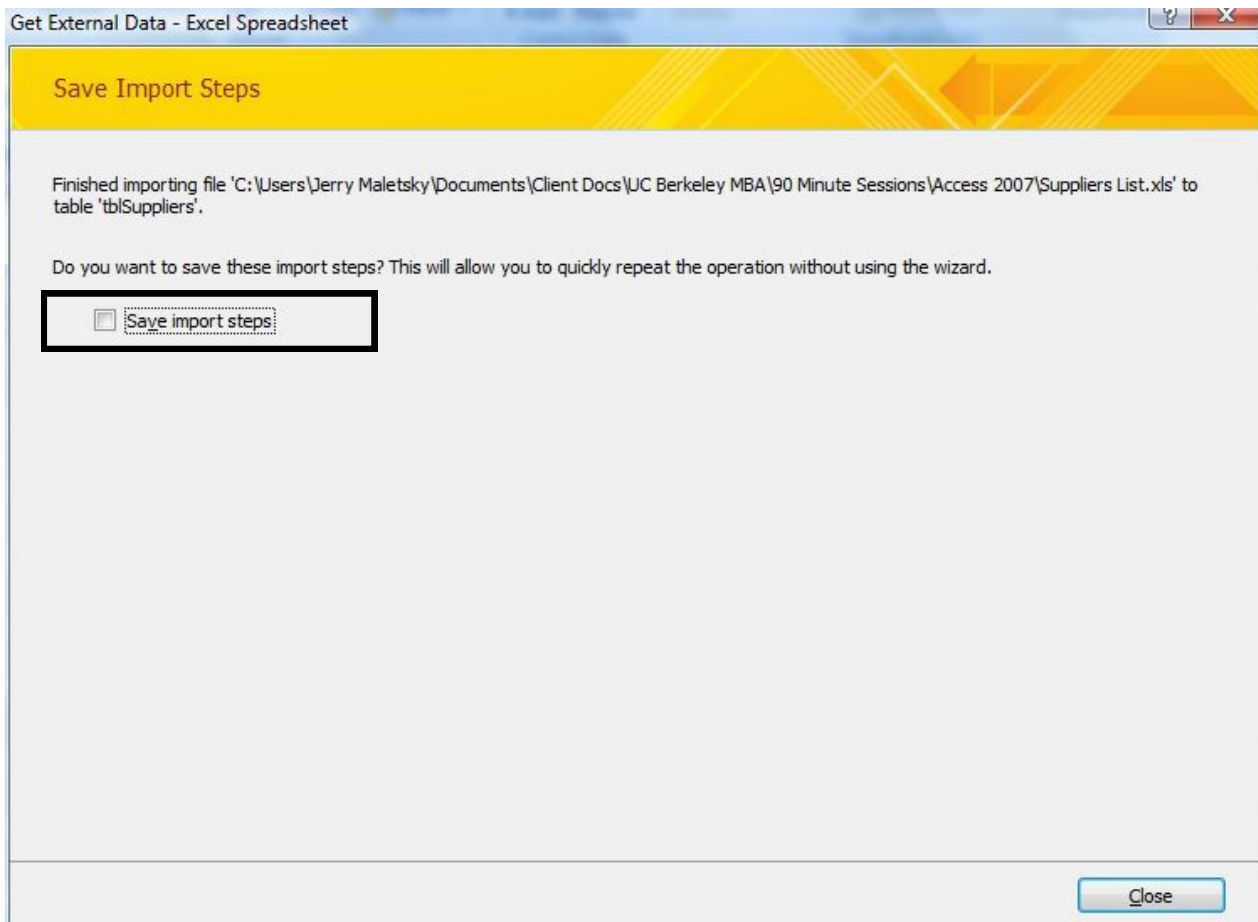


⇒ Specify a name for the new table

## IMPORTING DATA INTO ACCESS

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### Save Import Steps Box #1



⇒ Confirm that Access has completed the import process and whether you want to save the import information (Save Import Steps checkbox) to run without using the wizard process again in the future

## IMPORTING DATA INTO ACCESS

### Save Import Steps Box #2

Get External Data - Excel Spreadsheet

**Save Import Steps**

Finished importing file 'C:\Users\Jerry Maletsky\Documents\Client Docs\UC Berkeley MBA\90 Minute Sessions\Access 2007\Suppliers List.xls' to table 'tblSuppliers'.

Do you want to save these import steps? This will allow you to quickly repeat the operation without using the wizard.

Save import steps

Save as:

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 Import button that runs the import operation in Access.

Create Outlook Task

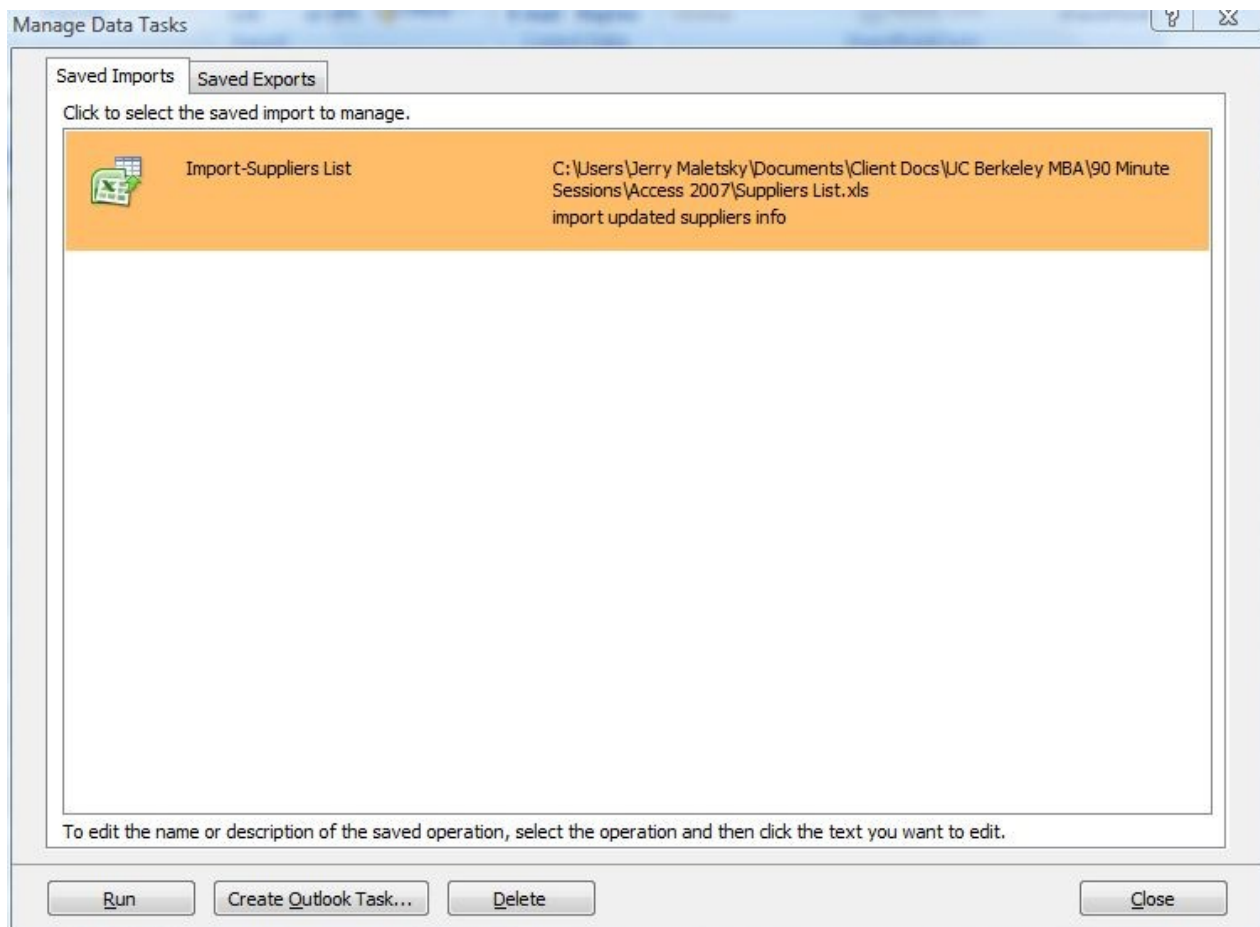
Hint: To create a recurring task, open the task in Outlook and click the Recurrence button on the Task tab.

⇒ If **Save Import Steps** checkbox is chosen, enter a name for the saved import and a description. Access also provides an option to integrate with Microsoft Outlook with the **Create Outlook Task** checkbox.

## IMPORTING DATA INTO ACCESS

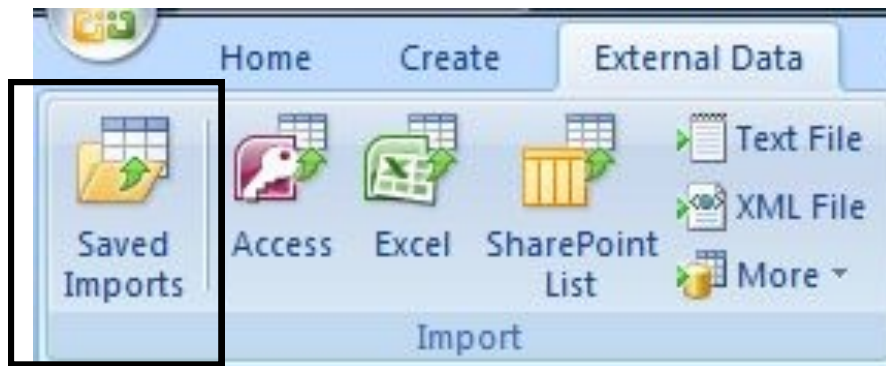
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### Run Saved Import Box



- ⇒ To Run a saved import select the **Saved Imports** command on the **Imports Group** on the **External Data tab**
- ⇒ Select the saved import and click the **Run** button

**IMPORTING DATA INTO ACCESS**



Completed Imported Table

Supplier ID	Supplier Name	Contact	Address	City	State	Zip	Phone	Contract Date	Credit Limit
25600	Acme Sports Ec	Alan Jones	344 Swift Terra	Newton	MA	12566	(203) 425-9876	6/19/2000	\$45,000
25601	Thomas Athlet	George Thoma	655 Utica Lane	Los Angeles	CA	94123	(213) 456-7124	9/3/1999	\$60,000
25602	Wilson Sportin	Mary Bitmore	865 Elm Street	Bolton	CT	12467	(341) 489-0975	8/23/2000	\$28,000
25603	Harrison Sports	Neil Harrison	23 Third Avenu	Santa Barbara	CA	97654	(714) 321-4545	5/14/1997	\$75,000
25604	Raleigh Athleti	Louise Miller	45 E. 52nd Stre	New York	NY	12345	(212) 344-9700	7/12/1998	\$55,000
25605	Kilburn Sports	Tom Welborn	900 W. Yuma	Phoenix	AZ	78654	(650) 298-5500	12/18/1997	\$40,000
25606	Larimore Tech	Bill Larimore	700 Brentwood	Fresno	CA	92345	(916) 555-2332	3/29/1997	\$25,000
25607	Vanguard Outc	Wendy Robert	400 SE Granger	Thomasville	OH	65789	(450) 255-4147	4/7/1999	\$65,000
25608	CycleWorld	Ed Nelson	125 E. Lansing	Mesa Verde	CO	85643	(525) 495-9000	2/22/1998	\$35,000
25609	Mountain Gear	Jack Hendley	699 Crestview	Butte	MT	34567	(725) 643-8765	10/17/2001	\$45,000
25610	Jansen Bicycle	Lee Chen	216 Pamona Av	Los Angeles	CA	94125	(213) 375-2000	8/2/1997	\$65,000
*									

### LINKING DATA FROM EXTERNAL APPLICATIONS

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As previously mentioned, external data can be linked to an Access database using the import process.

This option is selected in the Import screen when the file type to import is chosen (i.e. Excel, Access, or Text)

The **Link Table** option allows you to bring data into Access while still leaving it in its “native” format (i.e., Excel). In this way you can create queries, forms, and reports while other users can still update the data in the original source program. A link is established so that any data changes will reflect in Access as the data is updated in the original program.

In some databases, to help work around the limited size of an Access database (2GB), linking tables from the original database into the “production” database where queries and reports are created minimizes the size of that database.

One limitation of linking data rather than importing the data is that you will not be able to control which fields are imported, **can't add or edit data in Access**, change field properties, or set Primary Key fields.

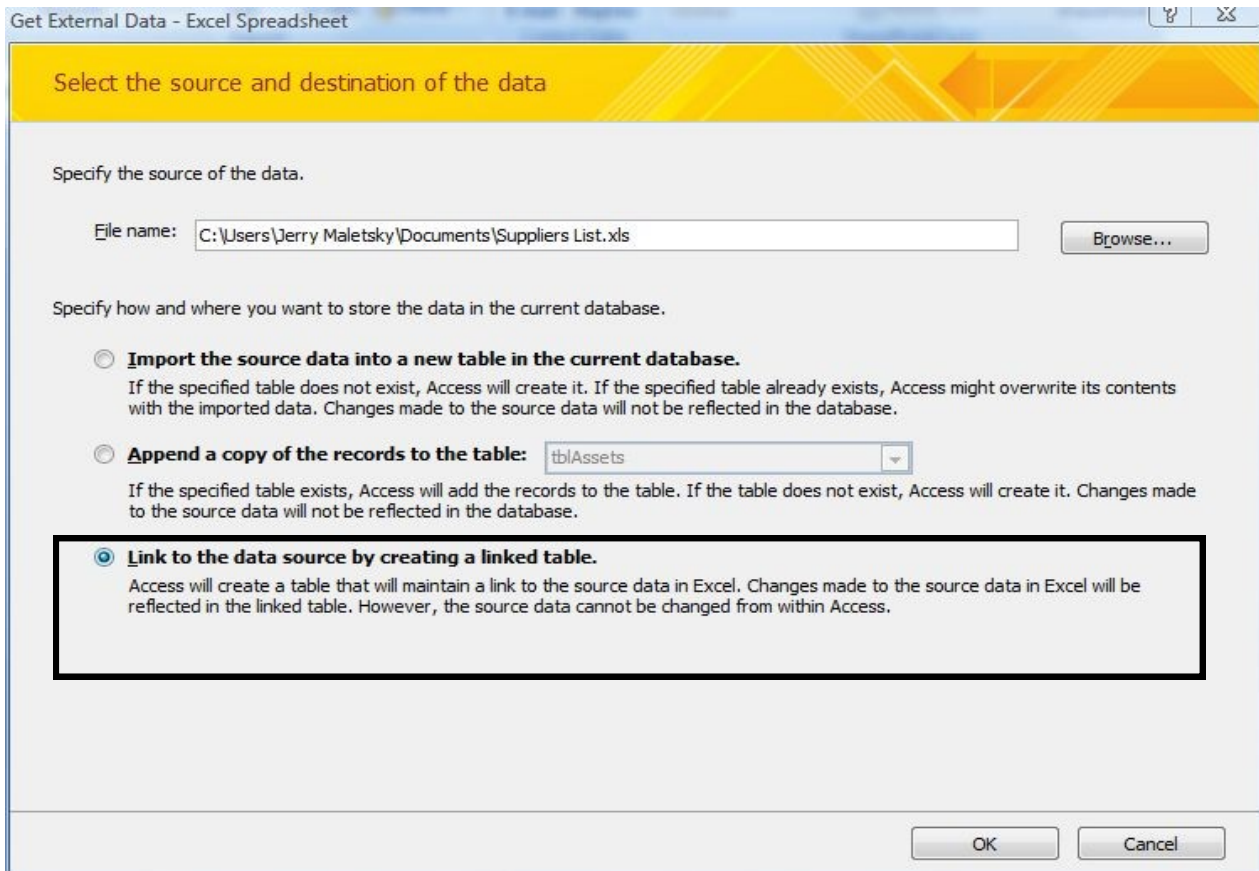
The **External Data Tab** in the ribbon of Access contains commands to manage importing and exporting.

#### Steps:

- ⇒ Open the database for which you want to link data
- ⇒ Click the **External Data** tab in the Access command ribbon
- ⇒ In the **Import Group**, select the type of file format that matches the data from which you want to import (i.e. Excel)
- ⇒ In the **Get External Data** dialog box, browse to the location that contains the source data file
- ⇒ After choosing the file, select the option **Link** in the **Get External Data** dialog box
- ⇒ Click OK to start the Import Wizard process

## LINKING DATA FROM EXTERNAL APPLICATIONS

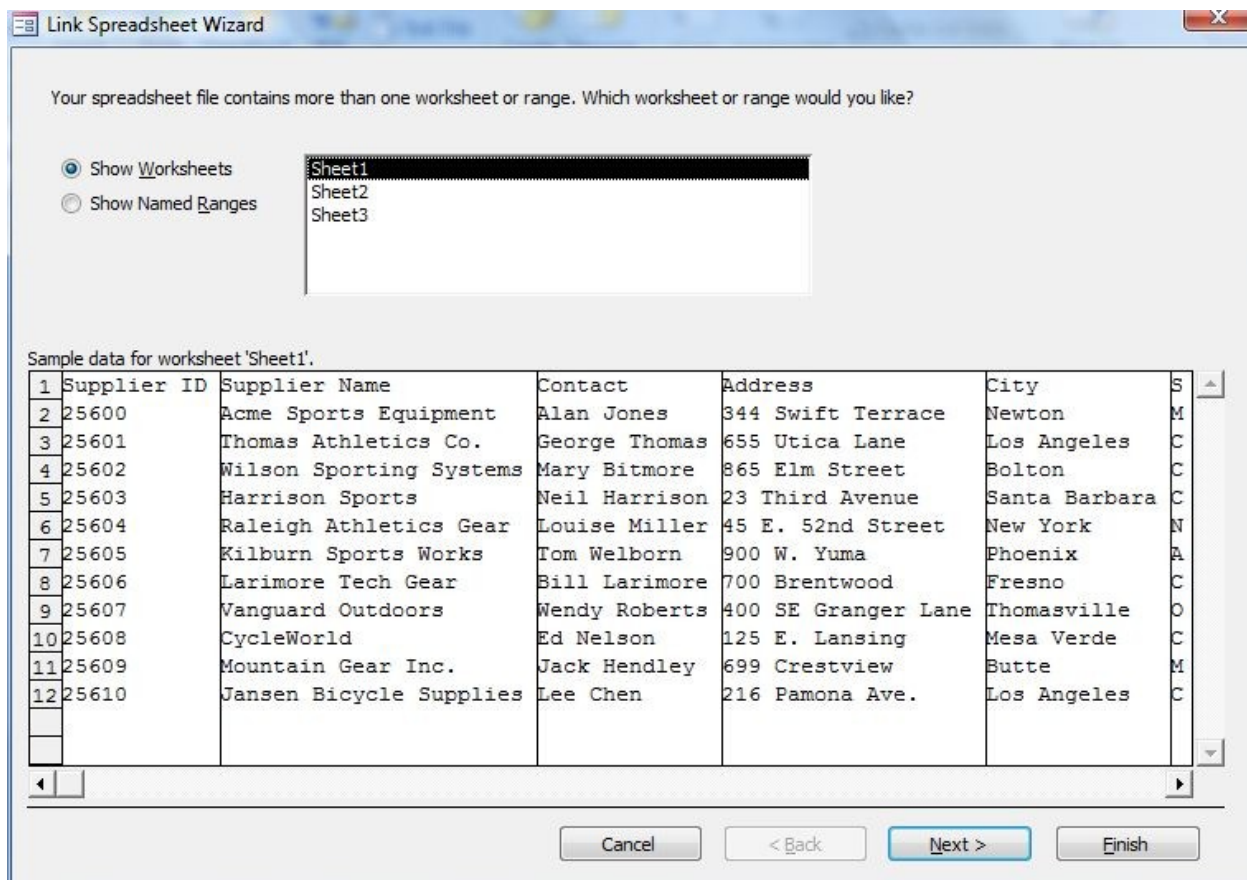
### Get External Data Dialog Box Options



⇒ After choosing the file, select the option **Link** in the **Get External Data** dialog box

## LINKING DATA FROM EXTERNAL APPLICATIONS

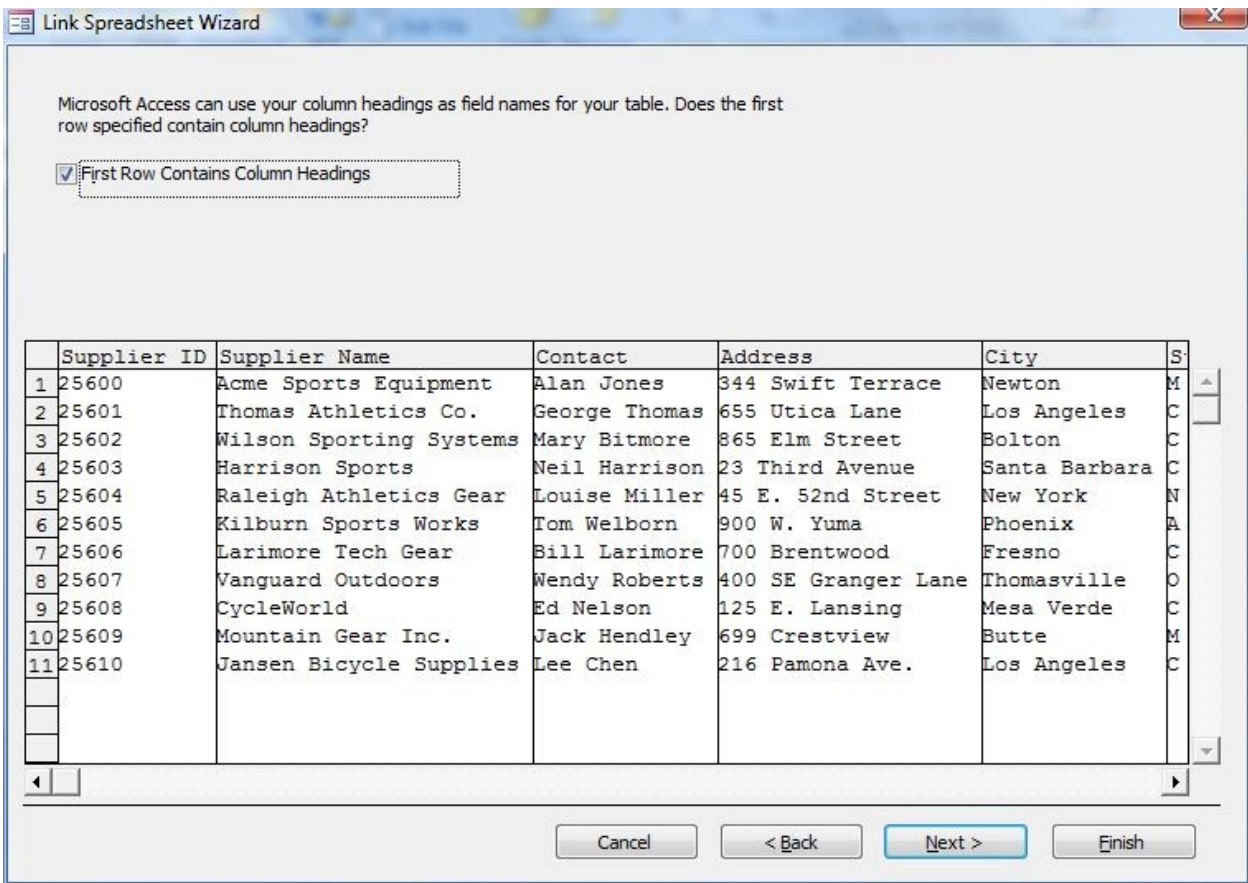
### Linking Data Wizard #1



⇒ Select whether to link data from the Entire Sheet (Show Worksheets) or by a Named Range (Show Named Ranges)

**LINKING DATA FROM EXTERNAL APPLICATIONS**

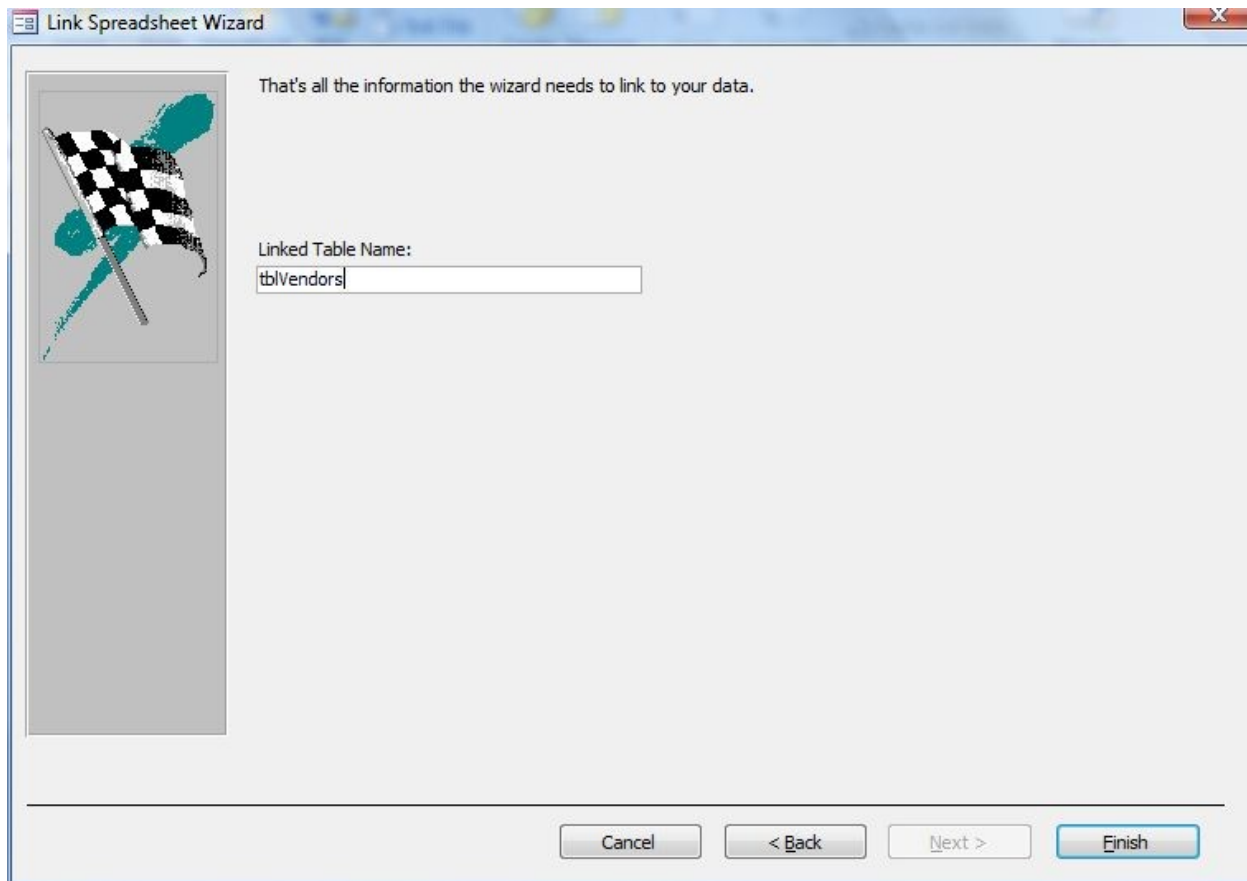
Linking Data Wizard #2



⇒ Confirm that the first row of the data range contains the field headings (First Row Contains Column Headings)

## LINKING DATA FROM EXTERNAL APPLICATIONS

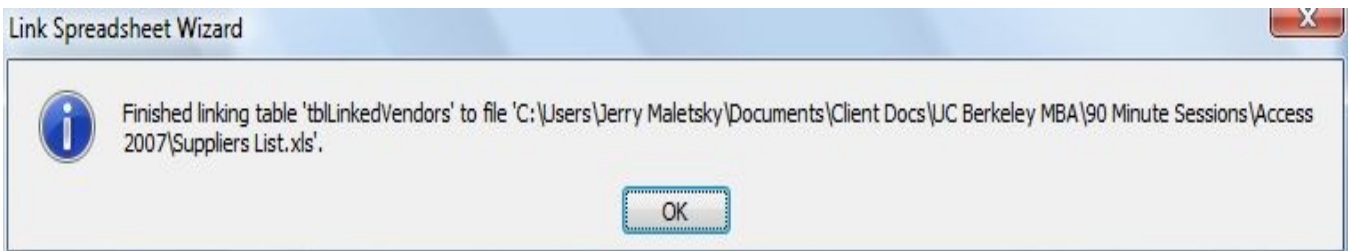
### Linking Data Wizard #3



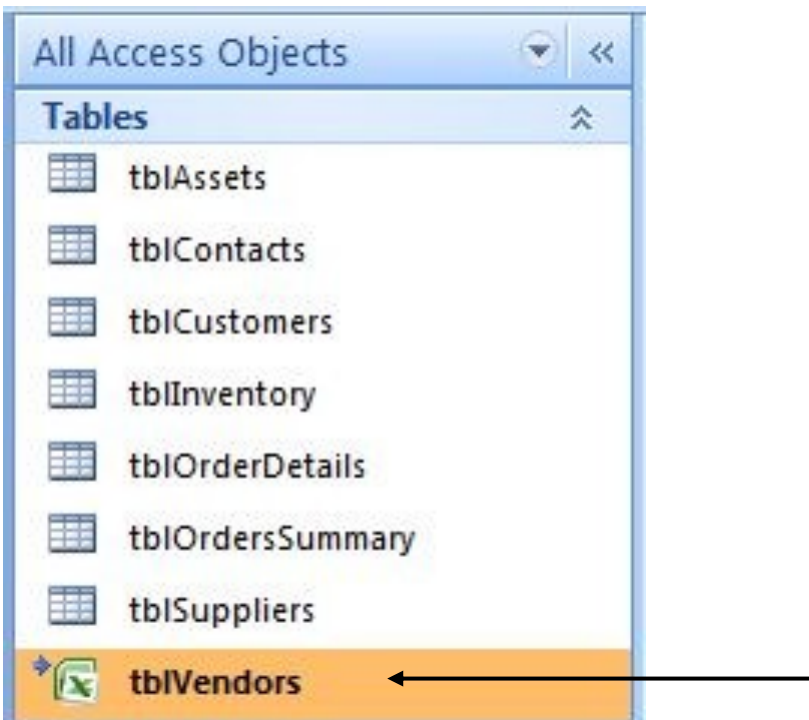
⇒ Specify a name for the new table

## LINKING DATA FROM EXTERNAL APPLICATIONS

### Linking Data Confirmation Box



### Navigation Pane Displaying Linked Table



### EXPORTING DATA FROM ACCESS

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Exporting data from an Access database allows you to use that table query, or report data in a program that is better suited to perform tasks necessary for that information.

For example, using a table or query in Access you can export the data into an Excel worksheet to create numeric analysis that can be shared easier with co-workers. That same table or query can be exported into Word within a departmental report or used to perform a mail merge with a master document.

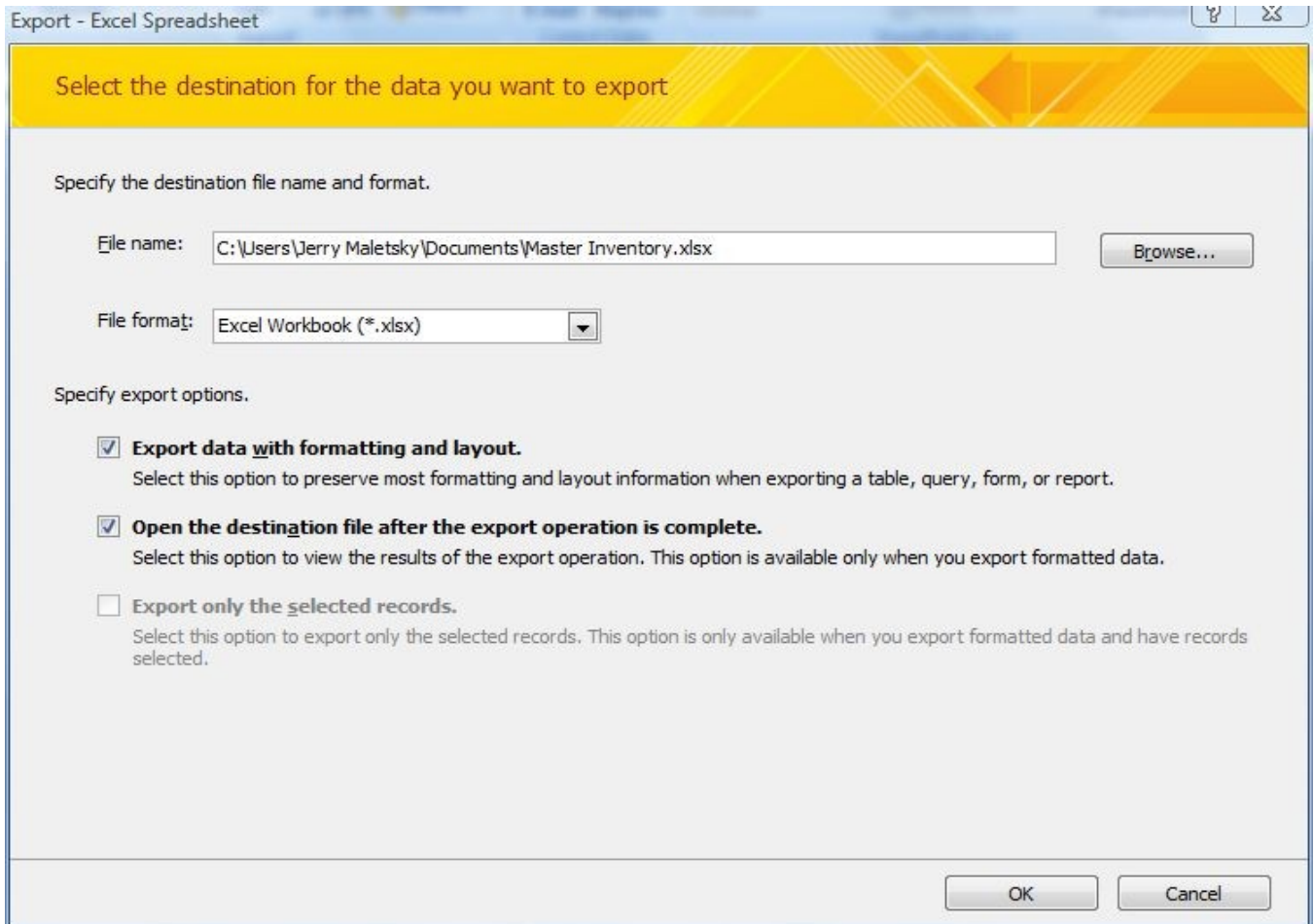
The **External Data Tab** in the ribbon of Access contains commands to manage importing and exporting.

#### Steps:

- ⇒ Open the database for which you want to link data
- ⇒ Click the **External Data** tab in the Access command ribbon
- ⇒ In the **Export Group**, select the type of file format that matches the data from which you want to export (i.e. Excel)
- ⇒ In the **Export Destination** dialog box, browse to the location where you want to store that data file
- ⇒ Type a name for that new file and click **Save**
- ⇒ Select the preferred export options such as...
  - Export Data With Formatting and Layout**
  - Open Destination File After Export Operation Is Complete**
  - Export Only Selected Records**
- ⇒ Click **OK** to start the Export process
- ⇒ Click **Close** to complete the process  
(Note: you can save the export information for future use)

## EXPORTING DATA FROM ACCESS

### Export Data Dialog Box



⇒ Select the preferred export options such as...

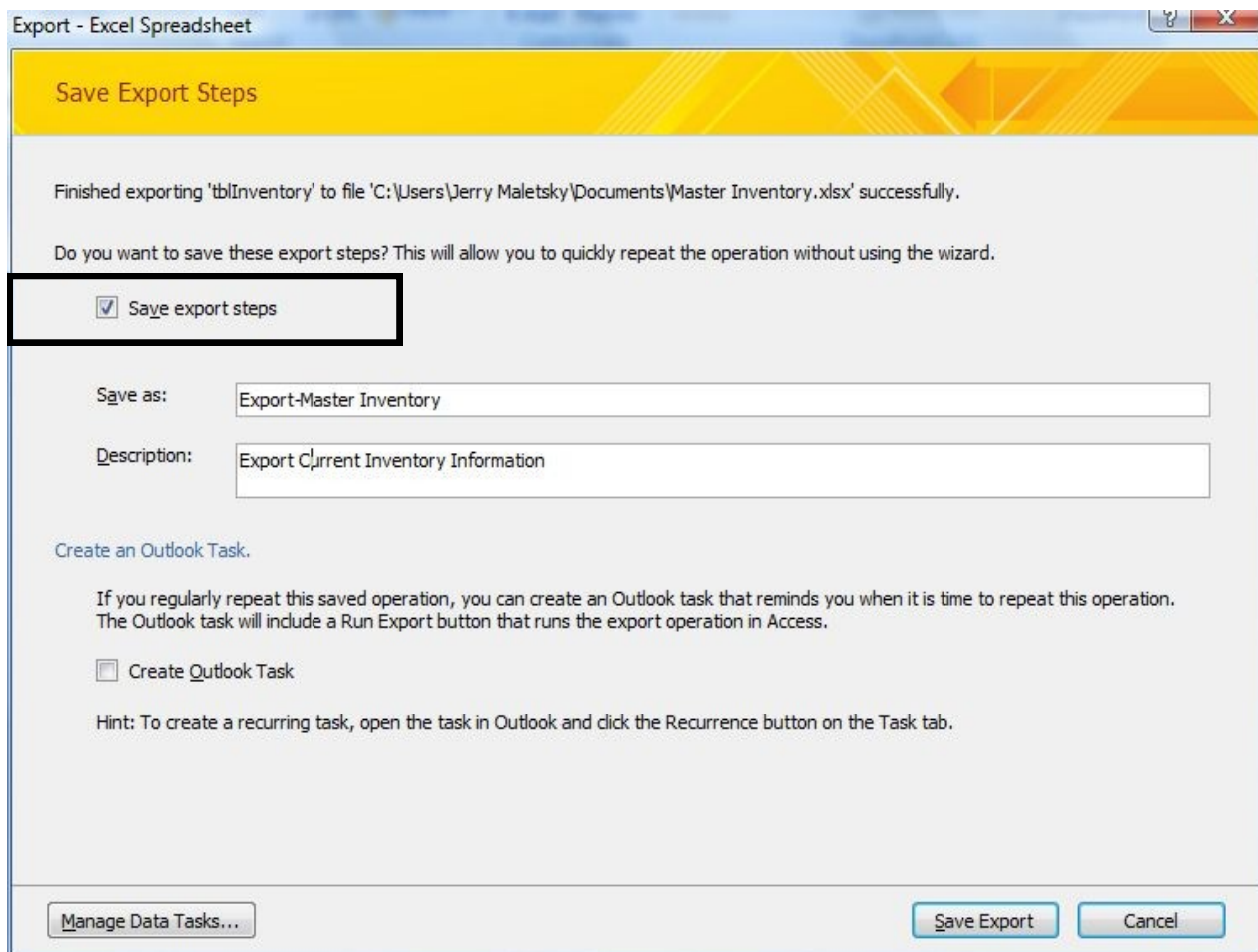
**Export Data With Formatting and Layout**

**Open Destination File After Export Operation Is Complete**

**Export Only Selected Records**

## EXPORTING DATA FROM ACCESS

### Save Export Steps Box



- ⇒ Click **Close** to complete the process
- ⇒ If you select **Save Export Steps**, enter a name and description
- ⇒ Click **Save Export** button to complete process

## EXPORTING DATA FROM ACCESS

### Exported Data Into An Excel Worksheet

	A	B	C	D	E	F
1	Product ID	Category	Product Description	Unit Cost	Selling Price	Quantity In Inventory
2	BH-2500	Bikes	Bunny Hop 2500	\$294.00	\$700.00	350
3	BS-2300	Accessories	Bike Seat	\$27.30	\$65.00	250
4	CR-4000	Bikes	Cruiser 4000	\$210.00	\$500.00	1000
5	CR-6000	Bikes	Cruiser 6000	\$378.00	\$900.00	800
6	DB-100	Accessories	Disc Brakes	\$52.50	\$125.00	300
7	KL-8500	Equipment	BMX Bike	\$245.00	\$650.00	150
8	MJ-4500	Bikes	Mountain Jumper 4500	\$630.00	\$1,500.00	2500
9	MJ-6500	Bikes	Mountain Jumper 6500	\$1,470.00	\$3,500.00	1500
10	MP-200	Accessories	Mtn. Trail Pedals	\$23.10	\$55.00	4000
11	MT-500	Accessories	Mountain Tires	\$21.00	\$50.00	600
12	PPB-Helmet	Apparel	Helmet	\$18.90	\$45.00	250
13	PPB-Shirt	Apparel	Shirts	\$18.90	\$45.00	500
14	PPB-Shoe	Apparel	Shoes	\$27.30	\$65.00	350
15	PPB-Short	Apparel	Shorts	\$23.10	\$55.00	500
16	RP-100	Accessories	Road Pedals	\$31.50	\$75.00	3000
17	RR-9000	Bikes	Road Racer 9000	\$2,310.00	\$5,500.00	575
18	RT-500	Accessories	Road Tires	\$14.70	\$35.00	500
19	RW-3000	Bikes	Road Warrior 3000	\$882.00	\$2,100.00	600
20	VB-100	Accessories	V-Brakes	\$35.70	\$85.00	450