

Microsoft SharePoint

Report Data to Access or Excel



Introduction

As the site owner, you have the opportunity to edit reports using Datasheet, or by using the Datasheet Task Pane, print and/or export them to programs such as Excel or Access for further manipulation. Reports are not just limited to Lists and can be used with Surveys, Calendars, Discussions and other compatible elements within your site.

Process Summary

- Editing in Datasheet
- Using the Task Pane

These directions are intended for use with a site collection as well as a subsite.

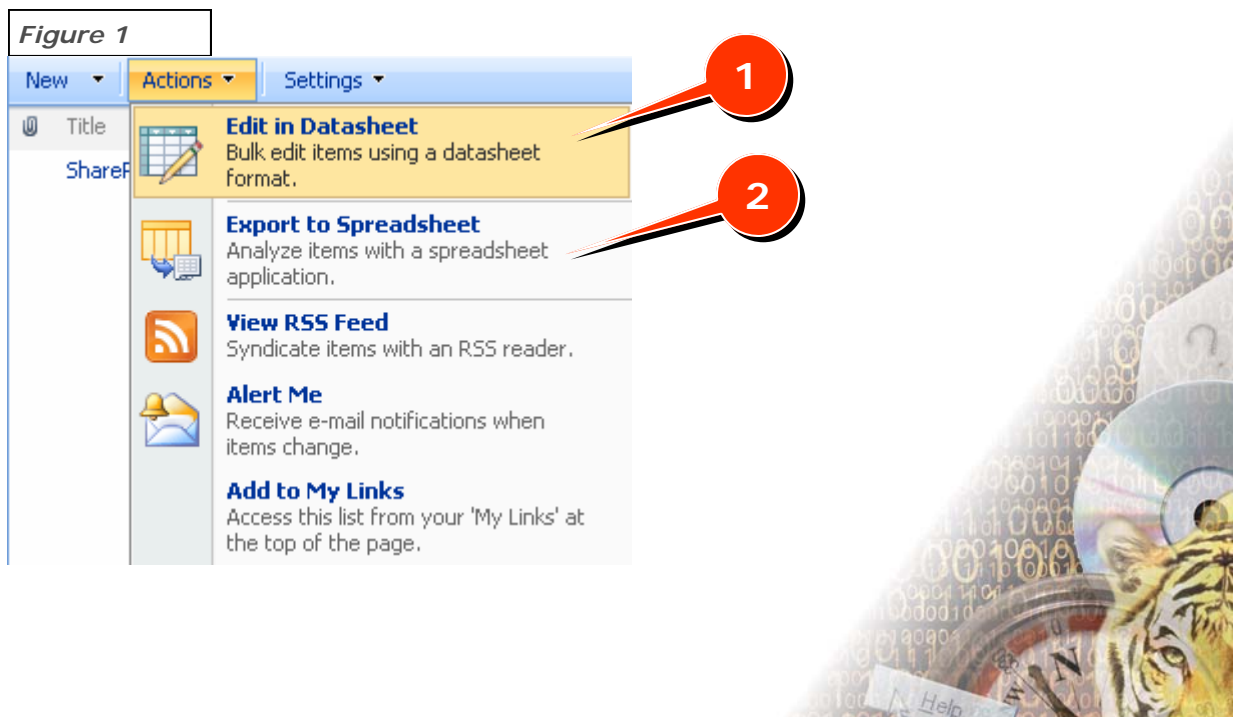
Datasheet is only supported in Internet Explorer, so alternative browsers such as FireFox are not supported and will not display the full set of available action choices.

Editing and Viewing Reports in Datasheet

1. On the top-left of the home page of your site, click on **Home**.
2. Select **Lists** or another menu selection you want to view from the quick launch menu.
3. Click on the **Actions** drop down menu and select **Edit in Datasheet** (Fig 1, 1).

If the element you select does not have an **Action** drop down menu at the top, then you may have to select an individual case within that element, or you may not be able to edit this element in Datasheet or export it to Excel.

If you plan on printing the data, you may want to export to an excel spreadsheet (Fig 1, 2) before doing so or data fields may not print correctly.



Within Datasheet, there are additional options available for making additions to your data as well options for totaling columns, refreshing the data, etc.

- ★ You may also want to refer to the [Editing Documents](#) SharePoint self-help document for additional information on exporting, editing, and uploading Office documents.

Using the Datasheet Task Pane

The Datasheet's **Task Pane** gives you the ability to print your current data, as well as Export and Link with Excel, Chart with Excel, Create Excel Pivot Table Reports, Export to Access, Create Linked Tables in Access, and Report with Access. To access the **Task Pane**:

1. On the top-left of the home page of your site, click on **Home**.
2. Select **Lists** or another menu selection you want to view from the quick launch menu.
3. If you want to choose a specific element to report, select that within this screen, otherwise if you prefer a general view proceed to step 4.
4. Click on the **Actions** drop down menu and select **Edit in Datasheet** (Fig 1, 1).
5. Click on the **Actions** drop down menu and select **Task Pane** (Fig 2, 1).
6. The Task Pane should then open on the right side of your window and present to you all of the options for data manipulation shown below (Fig 2, 2).

- ★ If the element you select does not have an **Action** drop down menu at the top, then you may have to select an individual case within that element, or you may not be able to edit this element in Datasheet or export it to Excel.

Figure 2

