

Creating a Data Source in Access

04/26/2024 3:07 pm EDT

Description of Issue:

How do I create a new Data Source for my SedonaOffice Company in Microsoft Access?

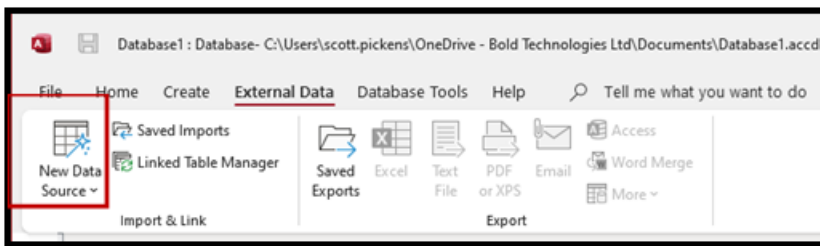
Resolution:

Your version of Access may look different, but the process should be similar.

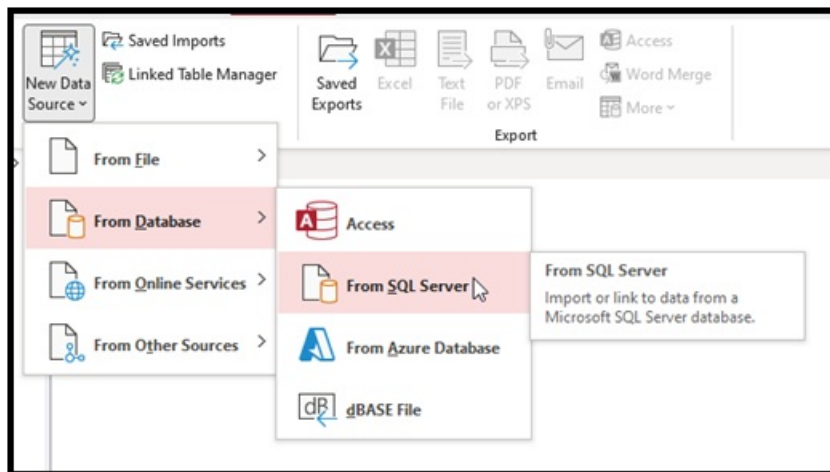
Open Access.

You should have an option in the toolbar for External Data.

Select New Data Source.



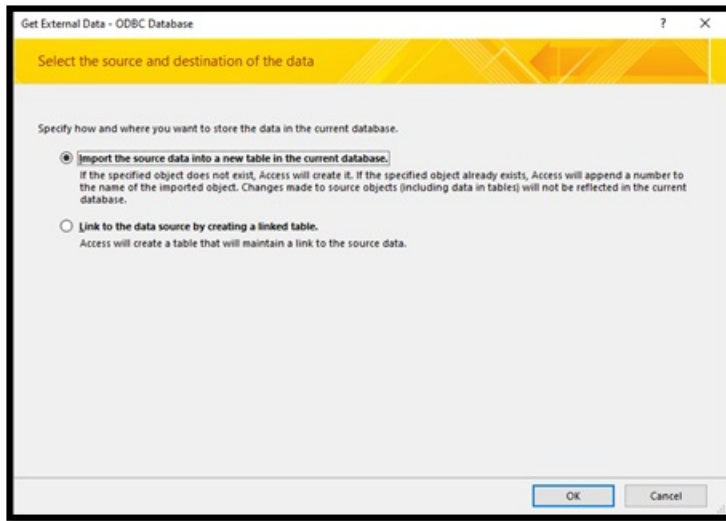
You should see the options for where to get the data from. Select the option From Database and then select SQL Server.



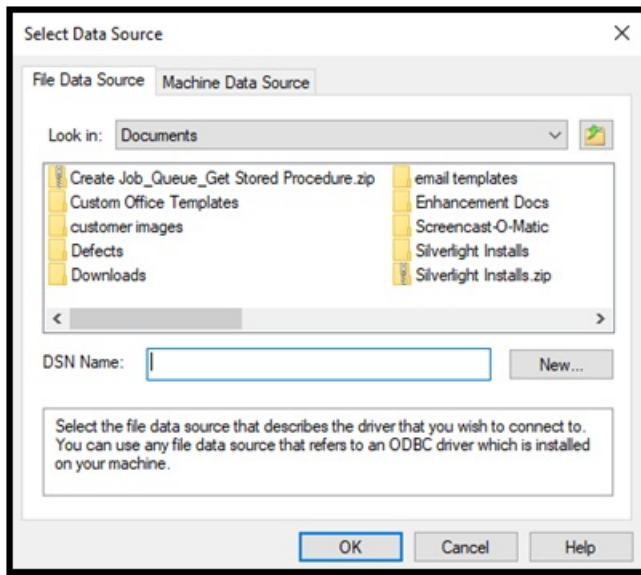
Select the option for your needs.

You can import the data to a new table, or you can link the existing table so any changes will be reflected in the Access data.

I will choose to import the data to a new table.

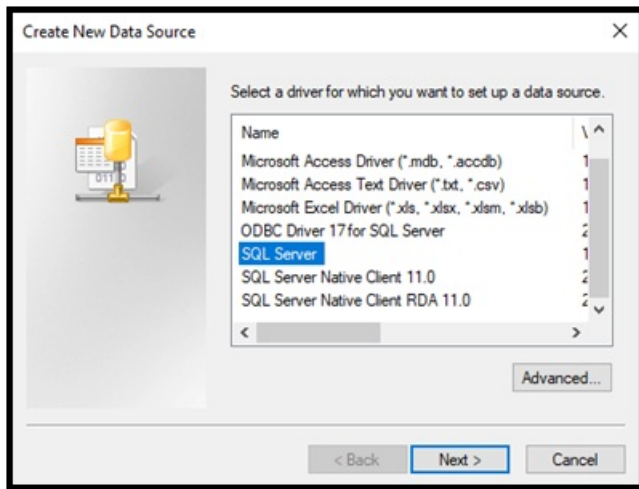


Click OK and the Select Data Source window will open.



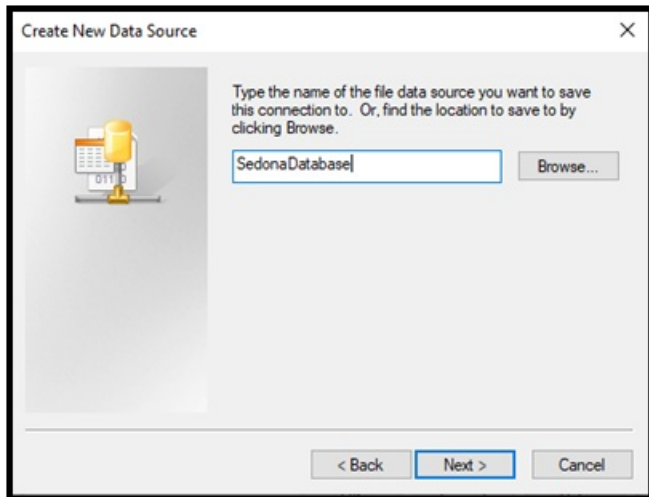
Click New.

Select SQL Server for the Driver to use.

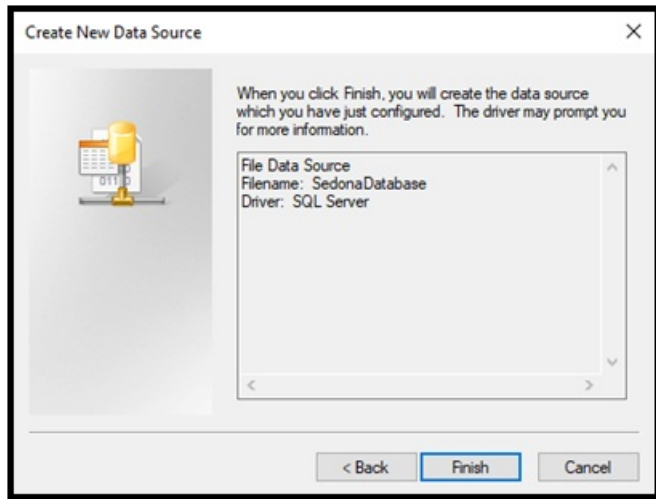


Click Next

Enter a name for your new data source.

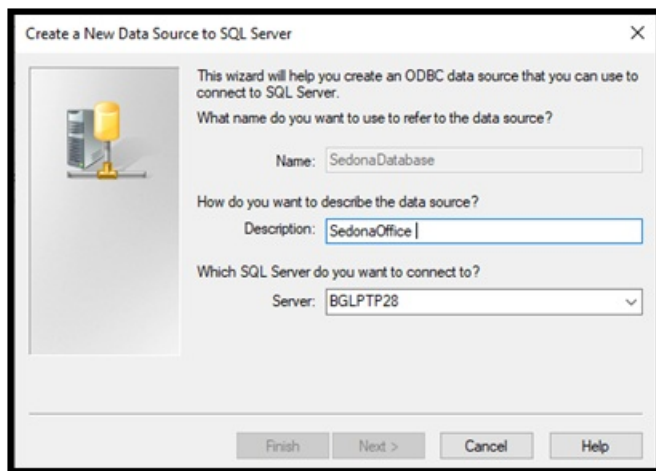


Click Next.



Then click Finish.

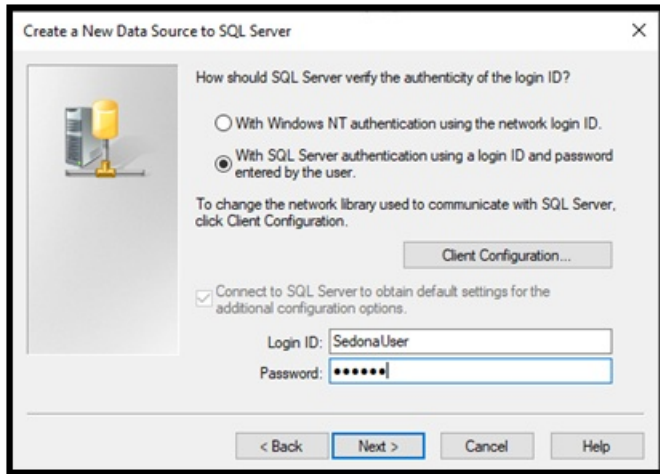
You will need to enter a description and select the SQL server where the data is located.



Click Next.

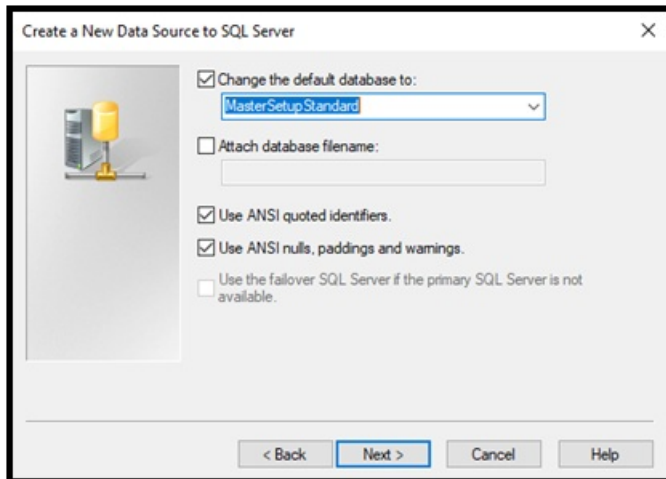
Select the account to connect to the SQL server.

If you have access, you can connect using Windows authentication or connect with a SQL user.

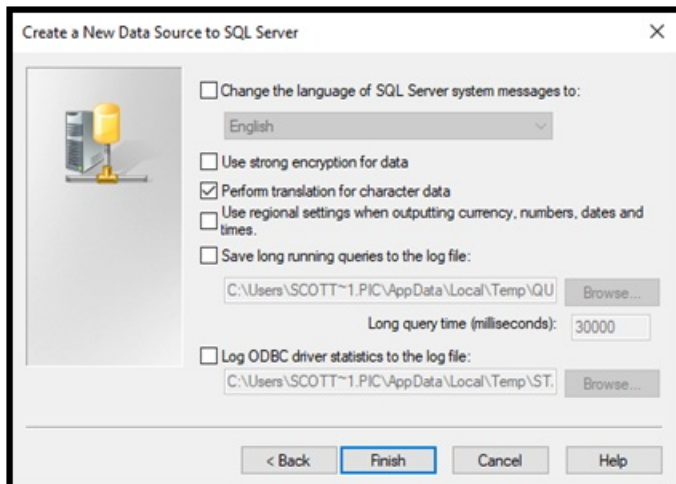


Click Next.

Select the default database that you will connect to.

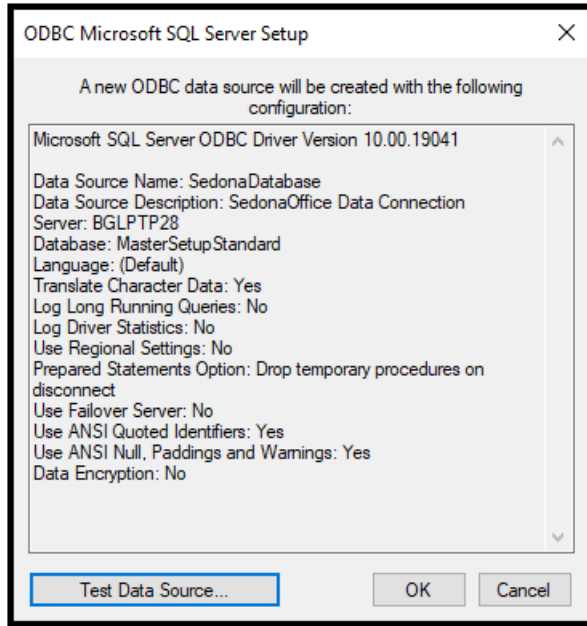


Click Next.

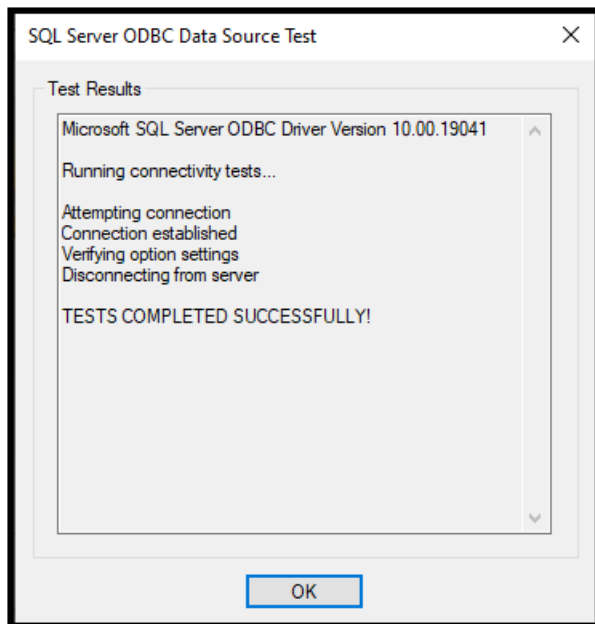


Click Finish.

You can Test the Data Source to verify settings.



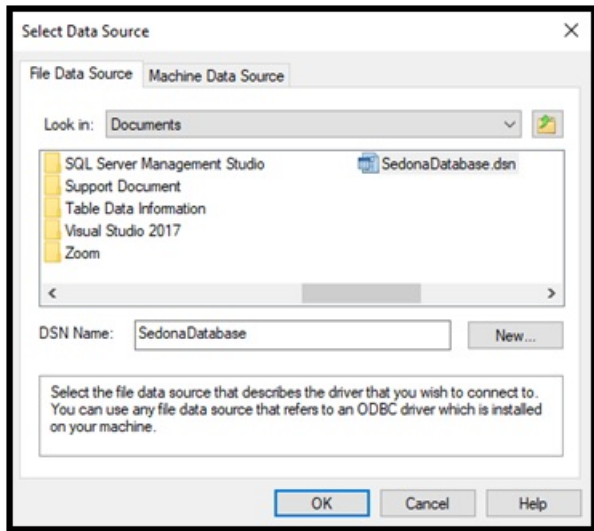
If all the settings are correct you should see the test confirmation.



Click OK then Click OK again to finish the setup.

You should then see the new data source in the selection screen.

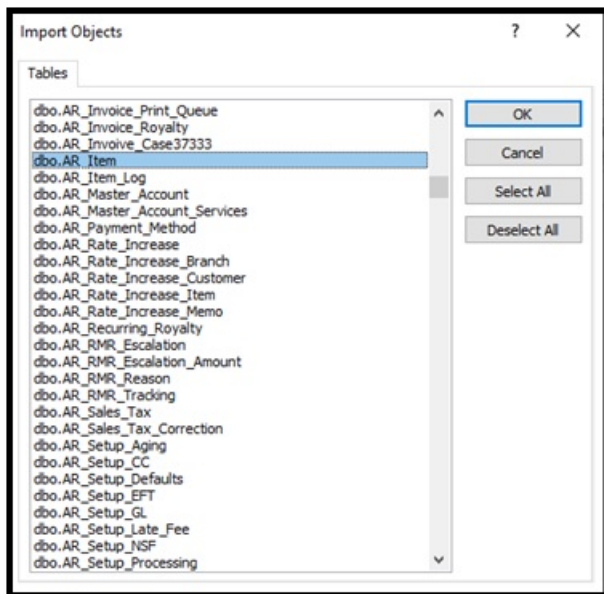
Select the new source and click OK.



You may be prompted for a password to connect.

Once connected you should get a list of the available tables.

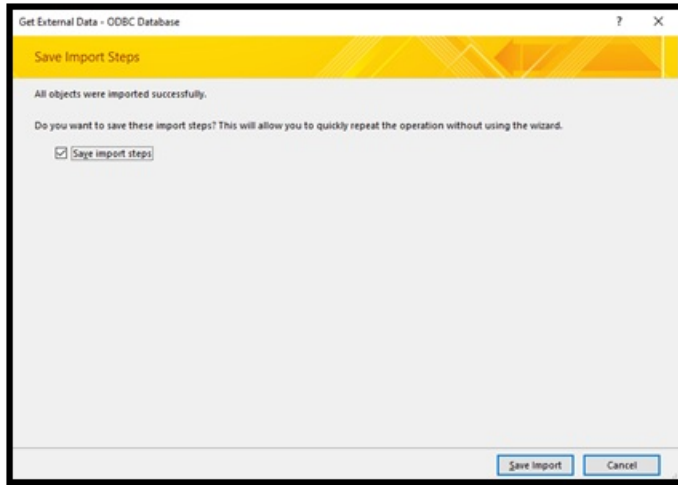
Select the table to import.



Click OK.

You may receive a screen with options to save the import steps.

You can save them if you are using this again.



The data should then be imported.

The screenshot shows the Microsoft Access interface. On the left, the "All Access Objects" pane shows a list of tables, with "dbo_AR_Item" selected. The main window displays a table with the following columns: Item_Id, Item_Code, Description, Account_Id, Taxable, Default_Rat, Unit_Of_Me, Sub_Item_O, and Item_Type. The data rows are as follows:

Item_Id	Item_Code	Description	Account_Id	Taxable	Default_Rat	Unit_Of_Me	Sub_Item_O	Item_Type
1	N/A	N/A	1	N	\$0.00	1	1	1
3	Install Burg Res	Install Intrusio	138	Y	\$0.00	2	1	2
7	MON-MON	Monitoring	9	Y	\$20.00	2	1	3
18	OCRPT	Open/Close Re	9	Y	\$10.00	2	1	3
20	Add-Ons	Add-On to Syst	158	Y	\$0.00	2	1	2
21	ADJ-ADD/UPG Job	Adj - Add/Upgr	210	Y	\$0.00	2	1	2
22	ADJ-INSP	Adjustment - It	212	Y	\$0.00	2	1	2
23	ADJ-LCOM Job	Adjustment - L	210	Y	\$0.00	2	1	2
24	ADJ-RSC Job	Adjustment - R	210	Y	\$0.00	2	1	2
25	ADJ-SVC	Adjustment - S	212	Y	\$0.00	2	1	2