

# Microsoft Excel Connector

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### Overview

Connect form responses directly to your Microsoft Excel Workbooks with the Microsoft Excel Connector. With the Microsoft Excel Connector, you can now quickly and easily access your response data within Excel for data processing and analytics enabling you to do even more with your data to meet your business needs. Choose to have the connector create a new workbook for you or connect to an existing workbook in your Microsoft account. There is no field mapping required of you; the connector handles the data mapping for you with a standard set of generated columns.

This connector is available as an Add-on for Team plans and higher when using FormAssembly Workflow. For those interested in purchasing this Add-on, please contact your CSM. If you do not have a CSM, please contact our Sales Team by filling out [this form](#).

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## Requirements

To use the Microsoft Excel Connector, a FormAssembly user must

- be part of a Team plan or higher
- purchase the Excel Connector Add-on for their instance
- have Content Management user permissions enabled for their login
  - specifically, the Microsoft Excel Premium Add-on must be enabled for the user account
- have a Microsoft Office 365 Business Plan that includes Microsoft Excel and OneDrive Cloud Services
  - ([see Microsoft Business Plans here](#))
- use the connector on a FormAssembly workflow

**Note:** The Microsoft Excel Connector does not work with On-Premises Microsoft Office 365 environments.

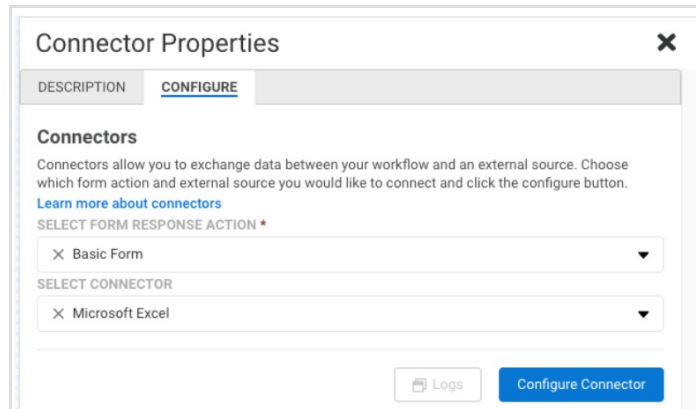
# Connector Setup

1. Within a new or existing workflow, add a connector step for your Excel Connector.

- Click **Add Step**
- Select **Connector** from the Search for Step dropdown menu

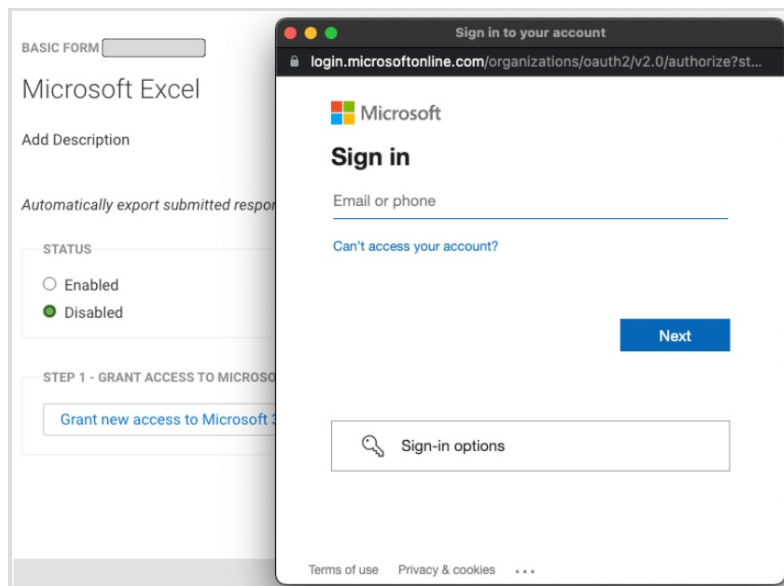
2. Set up the Connector Properties to pull response data from a FormAssembly Form, and send the data through an Excel Connector.

- In Connector Properties, select the Description Tab and enter a desired Connector Name (required) for the step and a description
- In Connector Properties, select the Configure Tab
  - In the Form Response Action dropdown, choose the form you want to connect to Excel
  - In the Select Connector dropdown, choose "**Microsoft Excel**"
  - Click the **Configure Connector** button



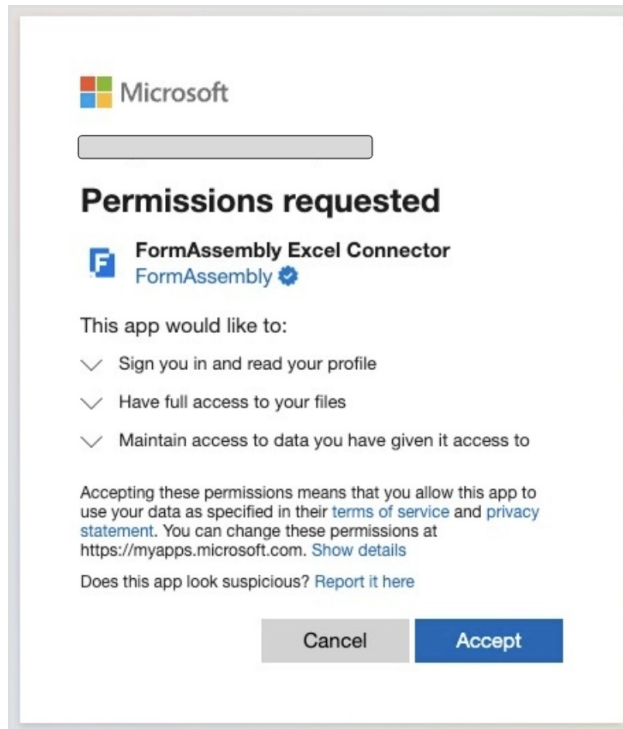
The screenshot shows the 'Connector Properties' dialog box with the 'CONFIGURE' tab selected. It contains two dropdown menus: 'SELECT FORM RESPONSE ACTION' with 'Basic Form' selected, and 'SELECT CONNECTOR' with 'Microsoft Excel' selected. At the bottom right, there is a 'Configure Connector' button and a 'Logs' button.

3. Configure the Excel Connector to connect to your Microsoft 365 Business account, choose an Excel workbook to send the response data to, and enable the connector.



The screenshot shows two overlapping windows. The background window is the 'Microsoft Excel' connector configuration page, showing a 'BASIC FORM' dropdown, a text input for 'Add Description', a status section with 'Enabled' and 'Disabled' radio buttons (where 'Disabled' is selected), and a 'STEP 1 - GRANT ACCESS TO MICROSOFT' section with a 'Grant new access to Microsoft' button. The foreground window is a Microsoft sign-in page titled 'Sign in to your account', showing the URL 'login.microsoftonline.com/organizations/oauth2/v2.0/authorize?st...', the Microsoft logo, a 'Sign in' heading, an 'Email or phone' input field, a 'Next' button, and a 'Sign-in options' section. At the bottom of the sign-in window are links for 'Terms of use', 'Privacy & cookies', and a menu icon.

- Grant access to your Microsoft 365 account
  - Click the "Grant new access to Microsoft 365" button
  - In the Microsoft modal pop-up, sign in with your Microsoft account email or phone number
  - Enter your Microsoft account password, when prompted
  - Complete any additional authentication steps configured for your Microsoft account
  - Accept the permissions requested by the FormAssembly Excel Connector for your Microsoft account
    - If you do not accept the permissions, you will be unable to use the connector



- You should see a banner message saying "Access granted to Microsoft 365. Please follow Step 2 instructions, enable the connector, and click Save button when ready."
- Choose whether you want FormAssembly to create a new workbook for you, or select an existing workbook from your Microsoft account to be updated

- Under STEP 2 - SELECT DESTINATION, select the radio button for either
  - Let FormAssembly create a new workbook
    - A new workbook will be generated the first time this workflow step is completed
    - The workbook will be named "Responses for form [FORM NAME]\_[YYYY]-[MM]-[DD] [HH]\_[mm]\_[ss]" where
      - FORM NAME = the name of the form you selected in Connector Properties
      - YYYY = the 4-digit calendar year the first time this workflow step is completed
      - MM = the 2-digit calendar month the first time completed
      - DD = the 2-digit calendar day the first time completed
      - HH = the 2-digit hour the first time completed
      - mm = the 2-digit minute the first time completed

- ss = the 2-digit second the first time completed
    - Example Workbook: Responses for form Example Form\_2023-04-04 14\_07\_16.xlsx
  - OR
  - Select a workbook to be updated
    - Choose an existing workbook that existing in your Microsoft 365 account from the dropdown
      - The connector will create a new tab in this workbook the first time this workflow step is completed
  - Enable the Excel Connector by selecting the radio button next to "Enabled"
  - Click **SAVE**
- 

## Viewing Responses in Your Workbook

Workflow responses generated through the Excel Connector are processed in real-time, though initial workbook creation may take longer. Responses are automatically added to your workbook upon submission.

**Note:** When a connected form is revised and saved, the next submission will start a new tab in your workbook. Additionally, renaming the most current tab in your workbook will cause a new tab to be created the next time a response is submitted to the form.

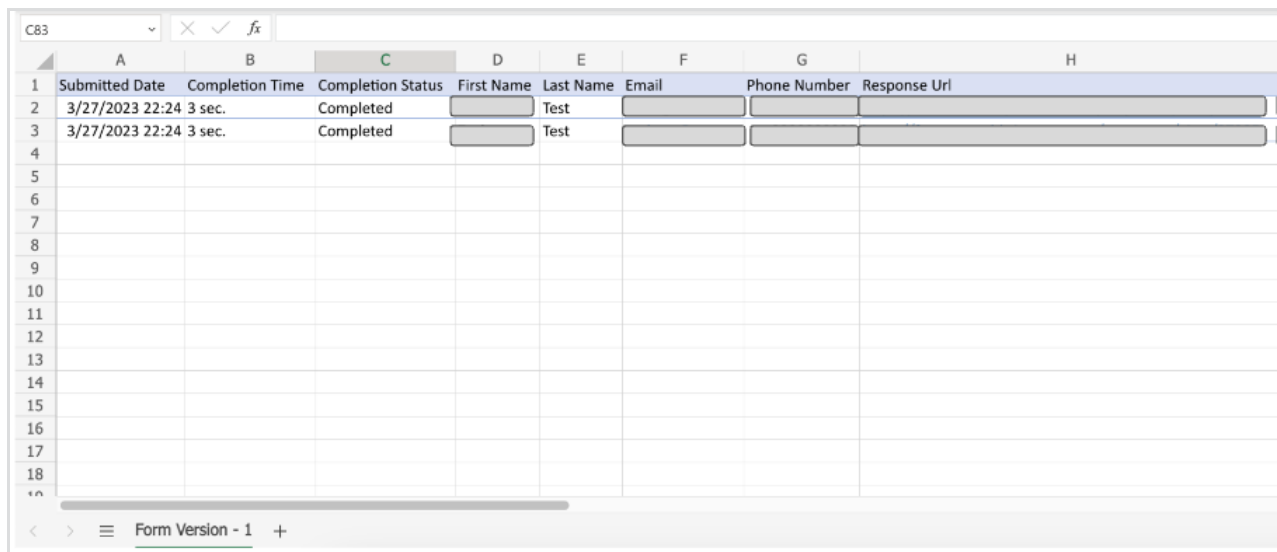
You can view responses through FormAssembly and your Microsoft 365 account. For more information on viewing workflow responses through FormAssembly, [click here](#).

In your Microsoft 365 account, look for the name of the workbook you configured in your Excel Connector. If you chose to connect to an existing workbook, search for the name of that workbook. If you chose to have FormAssembly create a new workbook, look for a workbook named the following: **Responses for form [FORM NAME]\_[YYYY]-[MM]-[DD] [HH]\_[mm]\_[ss].xlsx**

The Excel Connector generates the following Column Headers:

- Submitted Date
- Completion Time
- Completion Status
- [FORM QUESTIONS]
  - For each question on a Form, the name of the Form Question will have its own column header
- Response URL
- Referrer
- IP Address
- Unprotected File List
  - If File Upload fields exist in the Form, any uploaded files will populate here

Each response appears as its own row in the workbook.



	A	B	C	D	E	F	G	H
1	Submitted Date	Completion Time	Completion Status	First Name	Last Name	Email	Phone Number	Response Url
2	3/27/2023 22:24	3 sec.	Completed		Test			
3	3/27/2023 22:24	3 sec.	Completed		Test			
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## Additional Notes

- Please note that Excel files do not accept special characters in workbook names, so any existing special characters are stripped out of a FormAssembly-generated file name before it is submitted to your Microsoft 365 account.
- Do not edit connected workbook columns or rows created by the Excel Connector. Doing so may cause errors.