

# Connector MS SharePoint online

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# Connector SharePoint online

The connector SharePoint functionalities allow the following operations:

- The integration of documents to SharePoint online, from the ones integrated in AuraQuantic's dictionary libraries.
- Conversion of groups of fields to lists in SharePoint online.
- To download documents, form SharePoint online to libraries in AuraQuantic.

All the operations allow conditions to perform the uploads and also to gather certain information regarding the upload, such as the direct access URL, etc.

The connector can be executed from a CONNECTOR- (SharePoint online) system task, as an independent object or from an action button in a form. Both of these options are explained later in this document.



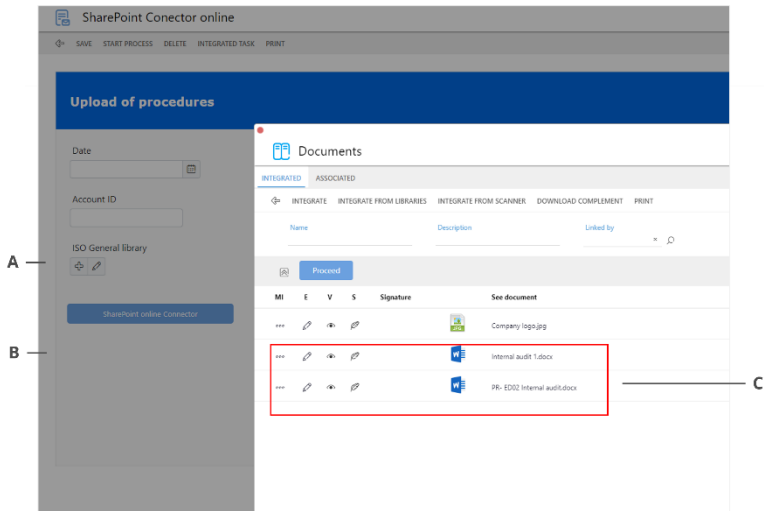
In the processes used as an example, we have a start message event (IM) where the start message creator integrates documents in the library field "ISO- General library" and one of the processes' requirements, is that a copy of the documents labeled as "Procedures" (quality procedures), is stored in the "ISO procedures" library in SharePoint online (*TestConnector*).

In order to achieve the latter, we use a SharePoint online connector (a SharePoint online connector for tests) and one operation. (Copy of ISO procedures in SharePoint).

To make sure that only the procedures are transferred to SharePoint, the corresponding conditions must be defined based on one of the document's labels. Finally, the documentation quality department responsible receives a task with a form, which has a group of fields (SharePoint connector test), that stores the uploaded results. The data that must be stored is the name of the document and its direct access URL

This procedure is explained further in this document.

In the image below, we can see that 2 procedures (*Audit 1and PR02*, featured in red)) have been integrated in the "ISO- General library" library field of the form, on the other hand the image (*company logo- jpg*) has not been integrated since it is not a "Procedure".



A Library to upload documents directly with the connector B Action button C Procedures

**Note:** the definition of a document as a “procedure” has been performed in a label.

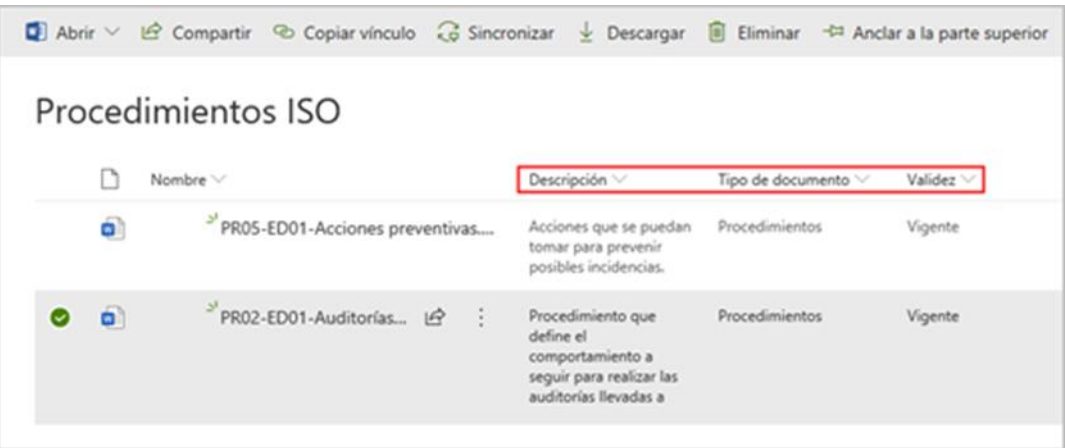
For more information about documents in libraries, consult the corresponding document in the Knowledge base.

In the example applied here, the connector is executed from an action button placed in a start event (IM) form, configured with a CONNECTOR- (SharePoint online) system task.

Before the upload, the library was empty, when we click on the action button that executes the CONNECTOR system task, the upload is performed.

In the following image we can see the SharePoint library with two uploaded procedures with their corresponding metadata.

The image Company logo.jpg has not been uploaded since it did not meet the required conditions.



Before starting with the AuraQuantic connector configuration, we must register a web App in Office 365. This action can only be performed by an administrator; however, the connector’s functionalities are available for other users.

**Note:** We must take into account that the Microsoft App does not allow multifactor authentication, so it must be deactivated for the SharePoint user who is going to use it to create the SharePoint online

connection, not only during its design for the authentication, but also while the connector is in production mode. It is recommended to create a user solely for this purpose.

## Creating the application in Office 365

In order to create this application, we must access the Office 365 web as an administrator and ingress the Microsoft 365 administration center.

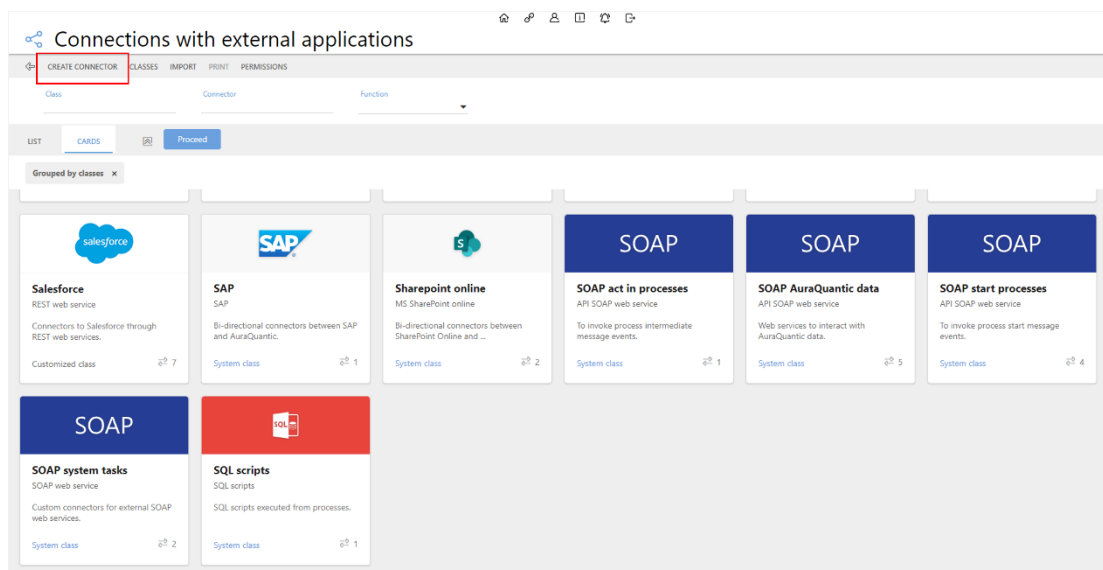
This document details the configuration options from AuraQuantic, consult the documentation facilitated by Azure, regarding their part of the configuration.

## Creating a SharePoint connector online

To configure the connection of AuraQuantic with the SharePoint online application we need the following data, which is provided in the App register procedure:

- Application ID (client ID In AuraQuantic).
- Client secret (in AuraQuantic "Secret Key")

We must access **Structure > Dictionaries > Connectors > Configuration** to configure the connector. A window containing the different connectors grouped by classes will open, as seen in the image below:



Next we must click on **Create connector**.

**Create connector**

Name  
Test Sp connector online

Function  
MS SharePoint online

Class  
Sharepoint online

Next

Register the required data and click on **Next**.

**SharePoint online Connector**

SAVE AND EXIT SAVE LOCATION DELETE COPY EXISTING PERMISSIONS

Name  
Test Sp connector online

URL

Class  
\_MS SharePoint Online

Description

Authentication ☐ Publish

Create operation

Introduce the URL and click on **Authentication**.

**SharePoint online Connector**

SAVE AND EXIT SAVE LOCATION DELETE COPY EXISTING PERMISSIONS

Name  
Test Sp connector online

URL

Description

Authentication ☐ Publish

Create operation

**Authentication**

SAVE AND EXIT SAVE

Client Id  
6\*+j\*n i4n:8Kb' dcG-Fu\$(SvK{3:

Secret key  
6\*+j\*n i4n:8Kb' dcG-Fu\$(SvK{3:

Username  
adminportal

Password  
\*\*\*\*\*

The window seen in the previous image contains the fields where we must introduce the data provided by the previously created application:

- Application ID (client ID In AuraQuantic).
- Client secret (in AuraQuantic "Secret Key")

**Note:** The URL refers to the SharePoint tenant, that we confirm with the Office 365 tenant name (auraportal in the previous image) and the sharepoint.com domain.

The username must be the one provided for the user who will access the SharePoint site, with the corresponding permissions and without double factor authentication activation.

## Operations

As explained in the previous section, while introducing data we can create an operation, however other operations can be created posteriorly, by clicking on the **Create operation** button.

Below we can see the window to introduce data:

The screenshot shows the 'SharePoint online connector' configuration window. The 'Operation' tab is selected, and the 'Upload documents' option is highlighted with a red box. The 'ORIGIN' section shows 'AuraQuantic library' and 'Upload' options. The 'DESTINATION' section shows 'SharePoint site name' and 'SharePoint library name' options. A table titled 'RELATIONSHIP BETWEEN DOCUMENT LABELS AND SHAREPOINT COLUMNS' is visible on the right.

Source label in AuraQuantic	Name to display	SharePoint column name
No element was found		

Here we can complete three different operations:

- Upload documents
- Download documents
- Create records in list

## Upload documents operation

In the image that follows we can see an example of the "Upload documents" operation:

The screenshot shows the 'Test SP connector online' configuration window. The 'Operation' tab is selected, and the 'Upload documents' option is highlighted with a red box. The 'ORIGIN' section shows 'AuraQuantic library' and 'Upload' options. The 'DESTINATION' section shows 'SharePoint site name' and 'SharePoint library name' options. A table titled 'RELATIONSHIP BETWEEN DOCUMENT LABELS AND SHAREPOINT COLUMNS' is visible on the right.

Source label in AuraQuantic	Name to display	SharePoint column name
Description	Description	Description
_Id1	Type of document	Type of doc.
_Id2	Validity	Validity

In the “Origin” section we can indicate the AuraQuantic library where the documents to upload are stored and what to do if they already exist in the destination library, we can also configure conditions based on the document labels, (e.g., only procedures).

In the “Destination” section we must indicate the data related to the SharePoint site where the upload will be performed, In the “SharePoint document route” we register the library and file, (the latter, only if available) where the corresponding document will be stored. See the following examples:

- Field= empty: The document will be stored in the SharePoint default library.
- Field= Library name: The document will be stored in the library that corresponds the library name.
- Field= Library name/ File name: The document will be stored in the library that corresponds the library name/ file name.

**Note:** it is important to remember that the selected library must be in the panel of the class of processes where the upload by system task will be performed, either in an independent object or in an action button.

The “Save results in” field displays a grid as seen below:

Origin field in SharePoint	Description	Destination field in the panel
ID	The unique identifier of the item within the drive.	[3_Comments on the project]
Name	The name of the document (filename and extension).	[3_Comments on the project]
Document path	The full path of the document in a site.	[3_Comments]
Error message	A message about the error that occurred.	[3_Additional comments]
Size	Size of the item in bytes.	[6_Affected/3_Comments to value]
Mime type	The MIME type for the file. This is determined by logic on the server and might not be the value provided when the file was uploaded.	[3_Comments]
Quick XOR Hash	A proprietary hash of the file that can be used to determine if the contents of the file have changed.	[3_Observations]
Web URL	URL that displays the resource in the browser.	
URL for anonymous edit access	A read and write URL is created for the document. Any person who has the link can access the document without needing to log in.	
URL for edit access within the organization	A read and write URL is created for the document. Any logged in user can use the link to access the document.	

The “Origin field in SharePoint” column show the SharePoint information that can be gathered after the upload, and the “Description” column includes a brief description of every SharePoint field.

Additionally, the “Destination field in the panel” allows the selection of a text type field to store this information. If a singular field is used, the information will be stored in the last uploaded document, but if instead we select a field that is inside a group of fields, the system will create a register for every uploaded document, with the indicated information.

We can map any of the origin library fields with SharePoint text type fields, although, there is an exception with the library origin “Yes/ No” fields, which can only be mapped with the SharePoint “Yes/No” fields. Finally, the date fields can be mapped with other date fields.

In the cases where a document is versioned with labels, the standard functioning of SharePoint online is to show two versions of the document, one for the uploaded document and another one for the labels.

## Create records in list operation

If the operation is of the “Create register online” type, the window to introduce data is different.

**Note:** The mechanics are similar to the ones previously described for uploading documents, the fields in common have the same functionalities in both operations.

In the following image we can see an operation to upload the mobiles assigned to the companies' employees in a SharePoint list.

The screenshot shows the 'SharePoint online Connector' interface. The 'Name' field is 'List of cooperative mobiles'. The 'URL' is 'https://extranet.auraquantic.com/AccessDoc.aspx?Cec0655mOnQyysY1U7pRHVA3eThVvFeTy92XQJ2zZ789/x70skvaQag8Bx7'. The 'Description' is '123456789'. The 'Authentication' is 'Basic'. The 'Operation' is 'Create records in list'. The 'Origin' is 'AuraQuantic group of fields'. The 'Destination' is 'SharePoint site name' (selected) and 'SharePoint list name' (selected). The 'Save result in' is 'Indicate'. The 'Grant additional permissions' is 'Indicate'. The 'Relationship between group of fields and SharePoint columns' table is as follows:

Source field in AuraQuantic	SharePoint column name	
Order name	[1]ArticleDescription_text	X
Order date	[3]DateOrder	X
Order email	[3]Additional comments	X
Order ID	[3]Request	X
Order name	[3]Title	X
Order date	[3]Comments on the project	X

Total: 0

## Download documents operation

The download documents operation is used to transfer documents from a SharePoint library to an AuraQuantic library. The fields are similar to those of other operations, just that in this scenario, we must indicate the SharePoint library from where to download the documents and the AuraQuantic library to store them.

The screenshot shows the 'SharePoint online Connector' interface. The 'Name' field is 'SharePoint online connector'. The 'URL' is 'https://extranet.auraquantic.com/AccessDoc.aspx?Cec0655mOnQyysY1U7pRHVA3eThVvFeTy92XQJ2zZ789/x70skvaQag8Bx7'. The 'Description' is '123456789'. The 'Authentication' is 'Basic'. The 'Operation' is 'Download documents'. The 'Origin' is 'SharePoint site name' (selected) and 'SharePoint library name' (selected). The 'SharePoint Library' is 'TestConnector'. The 'Document location' is 'All documents'. The 'Delete source library documents' is 'Delete source library documents'. The 'Destination' is 'AuraQuantic library'.



## SharePoint online connector in the CONNECTOR system task

The CONNECTOR system task with the SharePoint online function, is that of connecting AuraQuantic with a SharePoint site.

(TS) System task : 1.TS.1  
Entrance / Structure / Processes / Group of fields document / (TS) System task

SAVE AND EXIT SAVE SHIELDED RESTORE DELETE DATA

**IDENTITY**

Name  
Connector SharePoint online

Description from diagram

Description for documentation

**EXECUTION**

Type of TS  
CONNECTOR - (SharePoint Online)

Connector  
Test SharePoint Connector

Conditions

**ADD OPERATION**

Order	Operation
1	Copy of ISO procedures on SharePoint

**SAVE RESULTS IN PANEL**

Return code  
Whole number

+1=Ok, -1 -2=Registered error in event viewer

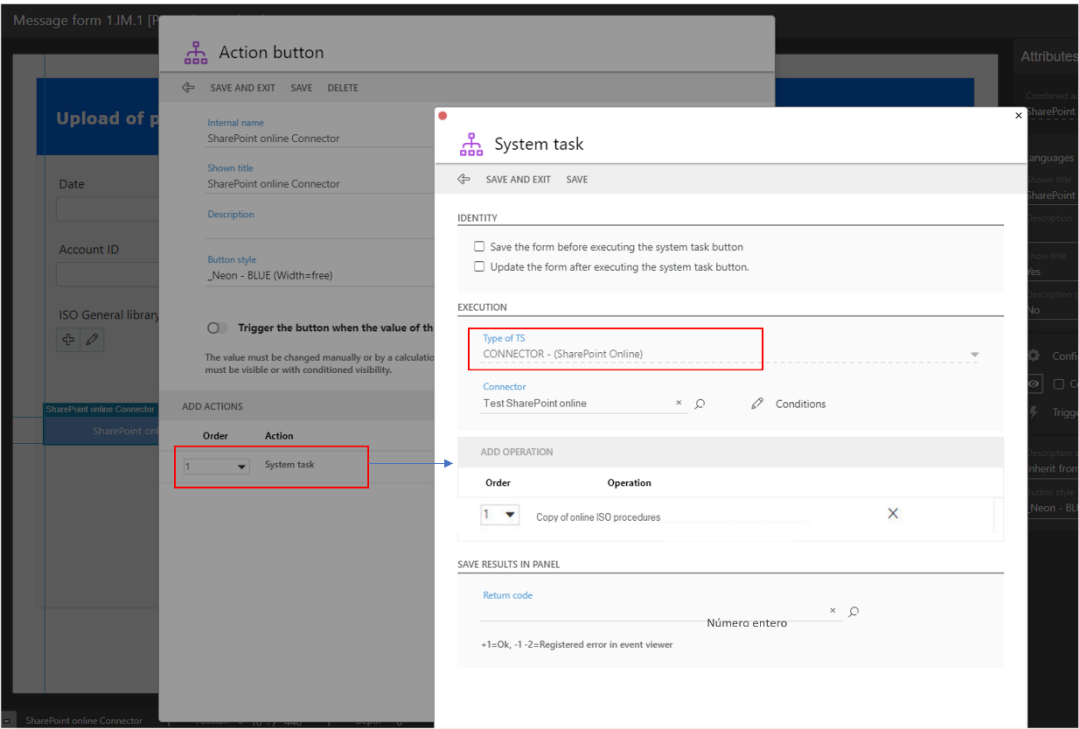
In the system task configuration, we must select a connector, as the example connector configured in this document and one or more operations. It is also possible to indicate the order in which the operations will be performed.

The “Conditions” field is to define the conditions, under which the connector will be executed.

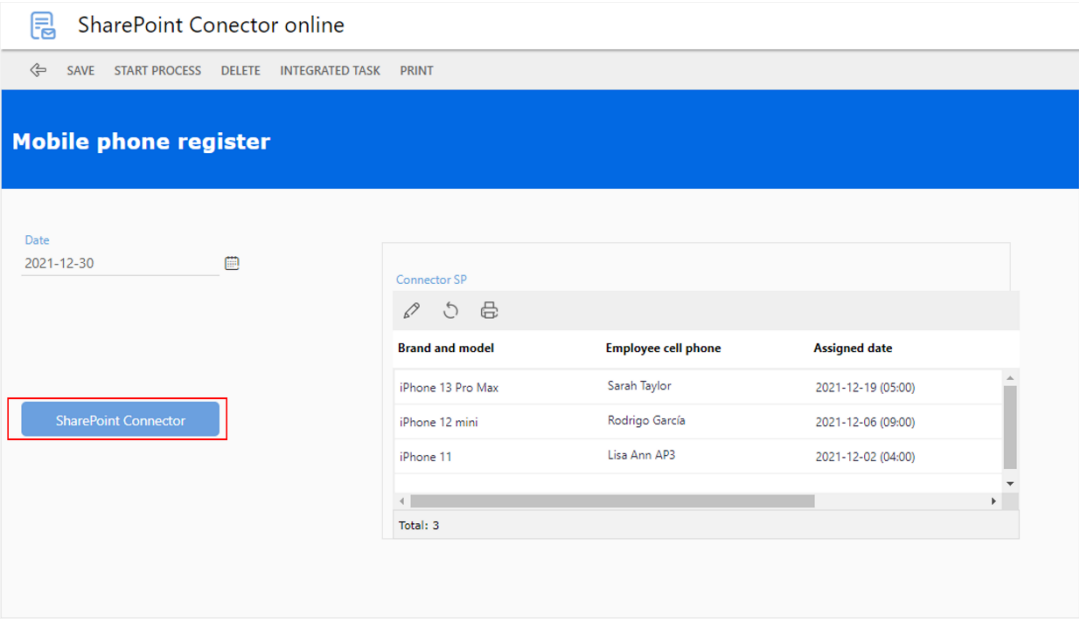
When the current flows through the system task, if the conditions are met, the operations that meet these conditions will be performed in the established order. As previously mentioned, the operations also allow the definition of conditions in order to be executed.

## SharePoint online connector in an action button CONNECTOR system task

We can also execute the SharePoint online connector from an action button in a form. As seen in the following image:



The options here are the same as the ones described for the system task. The connector will be executed when we click on the corresponding button, seen in the image below beside the group of fields that contains the data that will be transferred to the SharePoint list.



In the following images we can see the SharePoint list with the registers created by the connector.

Nuevo

Exportar a Excel

Edición rápida

PowerApps

Todos los elementos

Lista de móviles de empresa

Marca y Modelo	Fecha asignación	Departamento	Empleado
HUAWEI Y8 2021-L02	4/12/2020	Marketing	Sara Roma
SAMSUNG GALAXY S21	12/6/2019	Comercial	Antón Suarez



## Connector MS SharePoint online

Structure

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