# SharePoint Data List Integration-Online Version Only

## Linking Excel File from SharePoint to our CMS

Clients to reference: DD Diversified Services
Clients to reference: Norkol Inc

**Step 1**
Client will host the excel file in their SharePoint and **link will need to be public.** A good way to test if the link provided is a public URL from SharePoint is add the following to the end of the link: **&download=1**. If the excel file downloads after you add this tag, it's verified that it's a public link and can be used within REACH. If the file doesn't download after adding the tag to the end of the URL, the client will need to adjust their permissions within SharePoint.

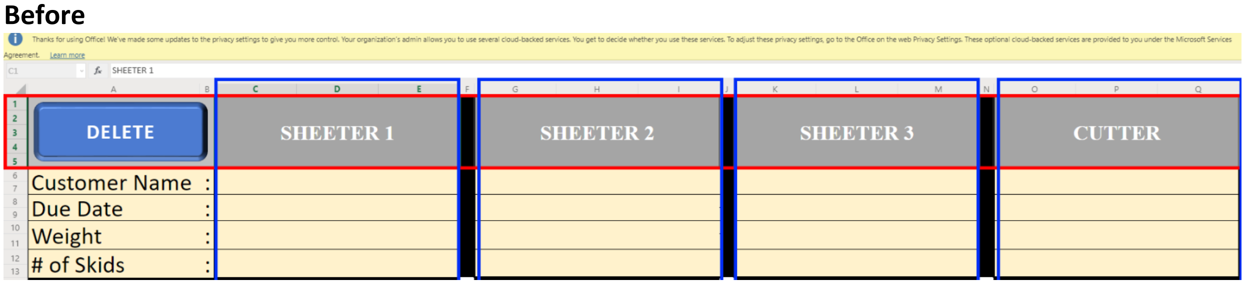
https://norkol.sharepoint.com/:x:/g/General/EcoZzxvfpiFIvFs93ZD3V1IBCUp7SeUieKH9lwXWP0PMJg?rtime=OEzDO0Jp2Eg**&download=1**

**** Before starting please make sure to look at how the excel file is formatted. It really needs to be designed simple. Here are somethings I have seen that won't work; ****

1. Graphs or buttons
2. Formatted Table Designs
3. Columns taking up multiple columns like the screenshot below.

*Sheeter 1 is taking up columns C, D, E – can't have this. Sheeter just needs to be in 1 column*

**Before**



**After**

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | Delete | Sheeter 1 | Sheeter 2 | Sheeter 3 | Cutter |
| 2 | Customer Name | | | | |
| 3 | Due Date | | | | |
| 4 | Weight | | | | |

3. Titles need to be on row 1. Referring to the top left corner here, that needs to be deleted

**Bad Example**

A1 | Plan name

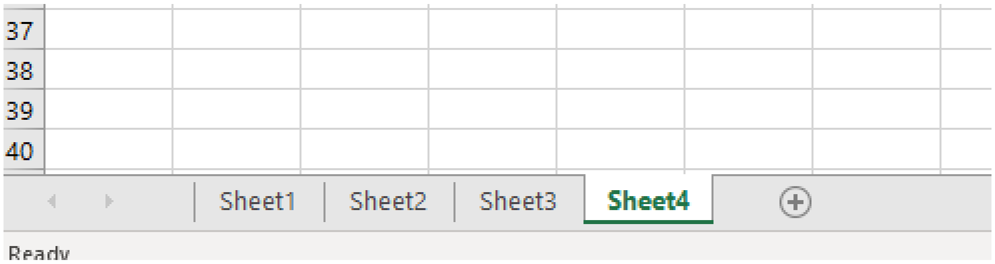
| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Plan name | Task - 2020-0029 Equinix CU2,3,4 | | | | |
| 2 | Plan ID | 8DecVNSIP0ervG6btJdg5WUAAaUD | | | | |
| 3 | Date of export | 10/06/2020 | | | | |
| 4 | | | | | | |
| 5 | Task ID | Task Name | Bucket Name | Progress | Priority | Assigned To |
| 6 | JThNqmUbyUa27R6ZZmm7v2UAPwsg | CU2- NET-2 | Approval/Revising Pha: | Not started | Medium | Kevin Scheffler |
| 7 | _jbByoS7zUGXpGRQetoYT2UAJABs | CU2 - NET-1 | Approval/Revising Pha: | Not started | Medium | Kevin Scheffler |
| 8 | HDP9uL_ao0m3gD13m9-wn2UANzA8 | CU3 - CH4-RIO | In Queue | Not started | Medium | |
| 9 | 3LBK5G1olkiJwn3qszwsmmUADy-g | CU3 - CH3-RIO | In Queue | Not started | Medium | |
| 10 | HvUvVtOUEEyIWz6dkROnimUAOyyJ | CU3 - CH2-RIO | In Queue | Not started | Medium | |
| 11 | 9f9Xj0UcCECF-tZ6u0FF0GUAINVC | CU3 - FF1-RIO | In Queue | Not started | Medium | |
| 12 | LesqdRngF06IWsU0DRXB7mUADXWd | CU3 - MECH3-RIO | In Queue | Not started | Medium | |
| 13 | 2km7POFqv0OIbp6OE9IB2WUAGA0I | CU3 - MECH2-RIO | In Queue | Not started | Medium | |

**Good Example**

B13 | CU3 - FF-GEN-RIO

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Task ID | Task Name | Bucket Name | Progress | Priority | Assigned To |
| 2 | JThNqmUbyUa27R6ZZmm7v2UAPwsg | CU2- NET-2 | Approval/Revising Pha: | Not started | Medium | Kevin Scheffler |
| 3 | _jbByoS7zUGXpGRQetoYT2UAJABs | CU2 - NET-1 | Approval/Revising Pha: | Not started | Medium | Kevin Scheffler |
| 4 | HDP9uL_ao0m3gD13m9-wn2UANzA8 | CU3 - CH4-RIO | In Queue | Not started | Medium | |
| 5 | 3LBK5G1olkiJwn3qszwsmmUADy-g | CU3 - CH3-RIO | In Queue | Not started | Medium | |
| 6 | HvUvVtOUEEyIWz6dkROnimUAOyyJ | CU3 - CH2-RIO | In Queue | Not started | Medium | |
| 7 | 9f9Xj0UcCECF-tZ6u0FF0GUAINVC | CU3 - FF1-RIO | In Queue | Not started | Medium | |

4. Client cannot integrate multiple sheets. Each sheet needs to be a separate excel file.




**Step 2**

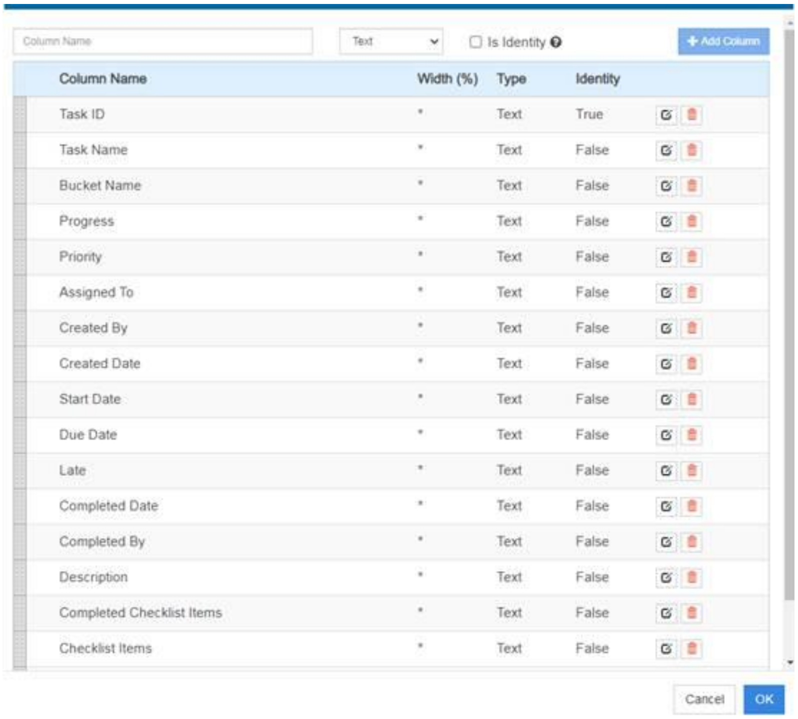
Create a data list that mirrors the excel file**.** Make sure one of your columns has a unique identified. If you don't have one, then please have the client add one.

Definition of a unique id:

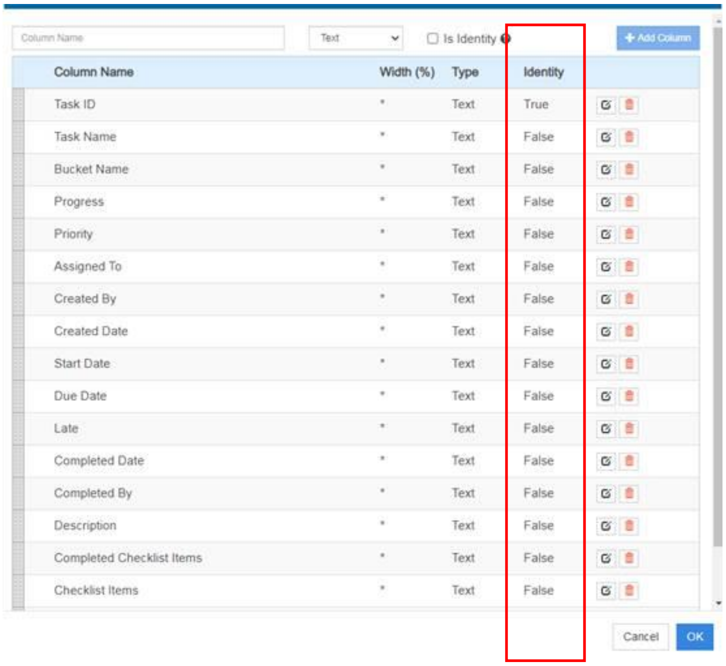
The reason why we need a series column is because the integration works by reinserting only those values that have been modified. To do that it needs the identity column with unique id. Every time the integration is ran, it compares each row based on the id of the row and inserts new value only if something is different. We do this so that integration runs faster, and processing resources are not wasted in deleting and adding the same data again and again

Create your data list --

** Please note, with the new upgrade to the data list you no longer have to match the <u>titles exactly</u>. For an example, if I accidently don't capitalize the "T" in Task Id, it will still work. The way we do the title integrations are a little different and are not so case sensitive. ☺

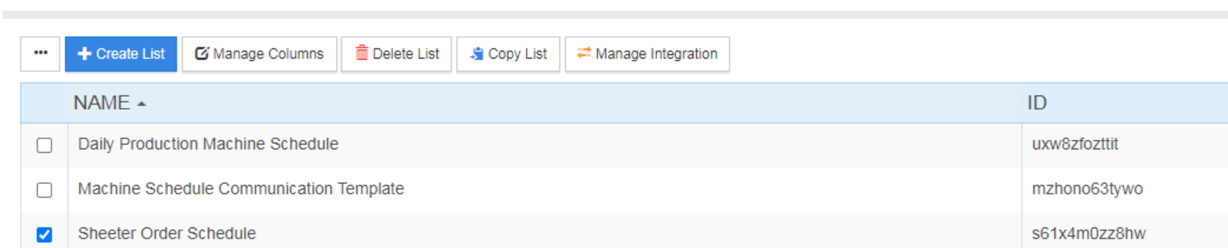



In this screenshot above my **Task Id** is my unique identifier as you can see it says true. If your client has a column that has money or a date within, you do not need to change the **"type"** to date or to money. Everything is always set to text and the reason why is because the integration doesn't read those columns as different fields. It just converts it into text. Screenshot below is what I'm referring to.

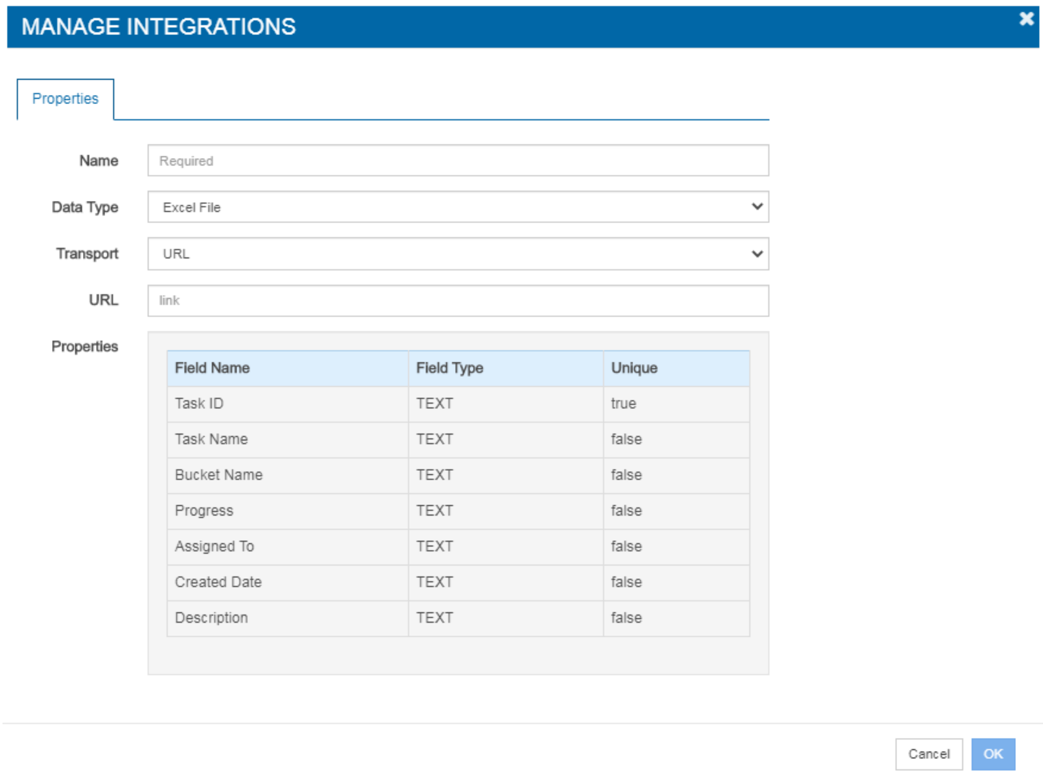



### Step 3

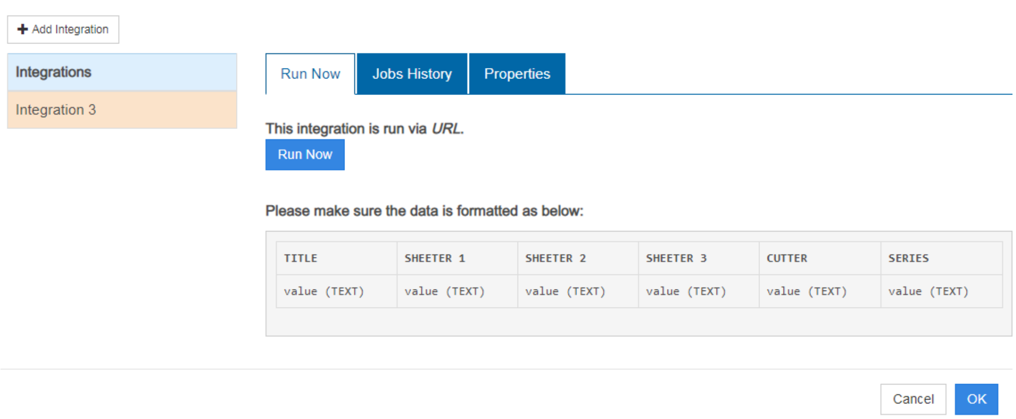
After the data list is setup the last part is to create an integration. Select the data list and hit Manage Integration.



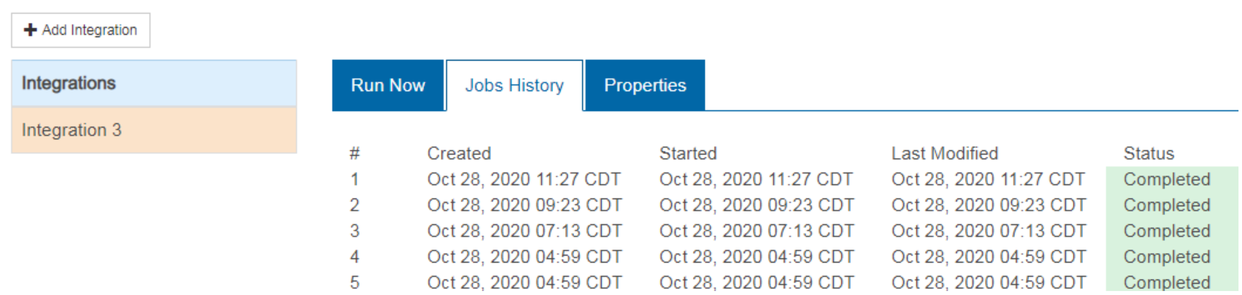
Select **Add Integration** >  “Data Tyle – Excel File” & “Transport – URL” > paste public URL from above




Once created hit **Run Now**



Select **Job History** to make sure it was completed.  Depending on how big the excel file is this may take a second or two. Be patient. You can keep hitting the Job History tab to keep reloading it.




If you get complete, then close out and double click into the data list to see your information. Once again if there is a lot of information then give a second. If you get an incomplete, then something was missed in the setup.

As a default this integration updates every 30 minutes for the latest and greatest information.