# 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?r time=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

Delore				
Thanks for using Office! We've made some updates to the	privacy settings to give you more control. Your organization's admin allows you to	use several cloud-backed services. You get to decide whether you use these services.	To adjust these privacy settings, go to the Office on the web Privacy Settings. These o	optional cloud-backed services are provided to you under the Microsoft Services
Agreement. Learn more				
C1 v fx SHEETER 1				
A B	C D E	F G H I J	K L M N	V O P Q
DELETE	SHEETER 1	SHEETER 2	SHEETER 3	CUTTER
<sup>+</sup> Customer Name :				
Due Date :				
<sup>10</sup> Weight :				
<sup>12</sup> <sup>13</sup> # of Skids :				

#### Before

After

	Α	В	с	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 $\overline{}$ : $\times$ $\checkmark$ $f_{x}$ Pla	n name				
A	В	С	D	E	F
1 Plan name	Task - 2020-0029 Equinix CU2	,3,4			
2 Plan ID	8DecVNSIP0ervG6btJdg5WUA	AaUD			
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	
0 HvUvVtOUEEyIWz6dkROnimUAOyyJ	CU3 - CH2-RIO	In Queue	Not started	Medium	
1 9f9Xj0UcCECF-tZ6u0FF0GUAINVC	CU3 - FF1-RIO	In Queue	Not started	Medium	
2 LesqdRngF06IWsU0DRXB7mUADXWd	CU3 - MECH3-RIO	In Queue	Not started	Medium	
13 2km7POFqv0Olbp6OE9IB2WUAGA0I	CU3 - MECH2-RIO	In Queue	Not started	Medium	

# Good Example

113 • : $\times \checkmark f_x$ CU3 - FF-GEN-RIO						
A	В	C D	E	F		
. Task ID	Task Name	Bucket Name Progress	Priority	Assigned To		
JThNqmUbyUa27R6ZZmm7v2UAPwsg	CU2- NET-2	Approval/Revising Pha: Not started	Medium	Kevin Scheffler		
_jbByoS7zUGXpGRQetoYT2UAJABs	CU2 - NET-1	Approval/Revising Pha: Not started	Medium	Kevin Scheffler		
HDP9uL_ao0m3gD13m9-wn2UANzA8	CU3 - CH4-RIO	In Queue Not started	Medium			
3LBK5G1olkiJwn3qszwsmmUADy-g	CU3 - CH3-RIO	In Queue Not started	Medium			
HvUvVtOUEEyIWz6dkROnimUAOyyJ	CU3 - CH2-RIO	In Queue Not started	Medium			
9f9Xi0UcCECE-t76u0EE0GUAINVC	CU3 - FE1-RIO	In Queue Not started	Medium			

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

37							
38 39							
39							
40							
4	Þ	Sheet1	Sheet2	Sheet3	Sheet4	+	
Read	v						

#### 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. ③

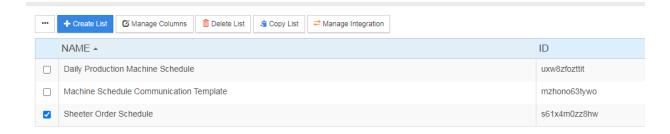
	× 0	Is Identity	- · · · · · · · · · · · · · · · · · · ·	
Column Name	Width (%)	Туре	Identity	
Task ID	•	Text	True	G 🔋
Task Name	×	Text	False	6
Bucket Name	•	Text	False	6
Progress	*	Text	False	G 📋
Priority		Text	False	6
Assigned To		Text	False	6
Created By		Text	False	G 🛢
Created Date		Text	False	6
Start Date	<i>.</i>	Text	False	G 🛢
Due Date	.*	Text	False	G. 🛢
Late		Text	False	6
Completed Date		Text	False	6
Completed By	•	Text	False	G 💧
Description	2	Text	False	6
Completed Checklist Items		Text	False	6
Checklist Items	*	Text	False	G 🔋

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.

Column Name	Width (%	) Type	Identity	
Task ID		Text	True	6 8
Task Name		Text	False	6
Bucket Name		Text	False	6
Progress	*	Text	False	6 8
Priority	181	Text	False	6
Assigned To	•	Text	False	6
Created By	•	Text	False	6
Created Date		Text	False	6
Start Date	÷	Text	False	6
Due Date		Text	False	G 🛢
Late		Text	False	6
Completed Date		Text	False	6
Completed By		Text	False	G 🛢
Description		Text	False	6
Completed Checklist Items		Text	False	6 8
Checklist Items		Text	False	G 🛢

### Step 3

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



erties				
Name	Required			
ita Type	Excel File			~
ansport	URL			~
URL	link			
operties				
	Field Name	Field Type	Unique	
	Task ID	TEXT	true	
	Task Name	TEXT	false	
	Bucket Name	TEXT	false	
	Progress	TEXT	false	
	Assigned To	TEXT	false	
	Created Date	TEXT	false	
	Description	TEXT	false	

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

#### Once created hit Run Now

tegrations	Run Now J	obs History Pro	operties			
tegration 3	This integration is Run Now					
	Please make sure	SHEETER 1	ed as below:	SHEETER 3	CUTTER	SERIES
	value (TEXT)	value (TEXT)	value (TEXT)	value (TEXT)	value (TEXT)	value (TEXT)

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.

+ Add Integration					
Integrations	Run N	low Jobs History Pro	perties		
Integration 3					
	#	Created	Started	Last Modified	Status
	1	Oct 28, 2020 11:27 CDT	Oct 28, 2020 11:27 CDT	Oct 28, 2020 11:27 CDT	Completed
	2	Oct 28, 2020 09:23 CDT	Oct 28, 2020 09:23 CDT	Oct 28, 2020 09:23 CDT	Completed
	3	Oct 28, 2020 07:13 CDT	Oct 28, 2020 07:13 CDT	Oct 28, 2020 07:13 CDT	Completed
	4	Oct 28, 2020 04:59 CDT	Oct 28, 2020 04:59 CDT	Oct 28, 2020 04:59 CDT	Completed
	5	Oct 28, 2020 04:59 CDT	Oct 28, 2020 04:59 CDT	Oct 28, 2020 04:59 CDT	Completed

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.