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SharePoint Online Activities

This section contains all activities for the communication with SharePoint Online and SharePoint on-prem (starting with SP 2013). These activities can be used to add a list, a list item, a task, or website to SharePoint, but can also be used to delete functions.

- Add SharePoint List
- Add SharePoint List Item
- Add SharePoint Task
- Add SharePoint Website
- Delete SharePoint List
- Delete SharePoint List Item
- Delete SharePoint Website
- Move File
- Set SharePoint Permissions
- Update List Item

The connection parameters are almost identical in all SharePoint Online activities:

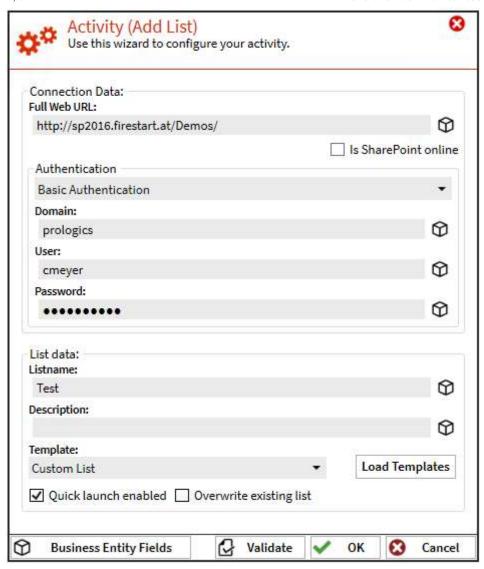
- Full Web URL -> Web URL of SharePoint Online instance
- Domain -> Domain of the company environment
- User -> Login name of a user who is authorized to access SharePoint Online
- Password -> Password of the previously mentioned user

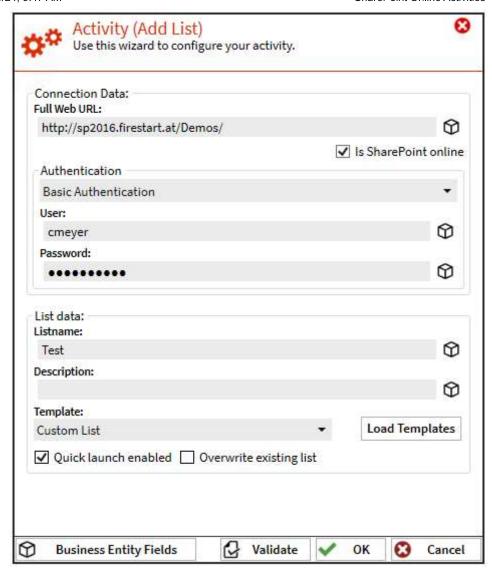
The online activities can be configured in two different ways, which is on-premises on the one hand and online on the other hand. In the following descriptions, there are always two screenshots the first on for on-premises and the second one for online.

Add SharePoint List

This activity allows you to create a list within SharePoint. The name of the list, a description and the template to be used can be selected. In addition, you can select whether the new list appears in the navigation and whether an old list with the same name should be overwritten.



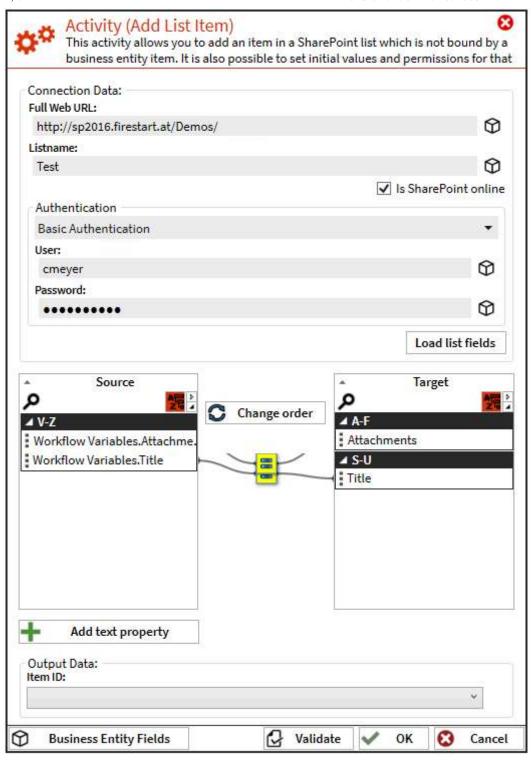




Add SharePoint List Item

This activity allows the automated creation of a list entry in SharePoint. If a connection is successful, all the column names of the list are loaded. The columns can be mapped to workflow variables and business entity links. As a return value, the activity returns the ID that SharePoint assigned to the new entry.

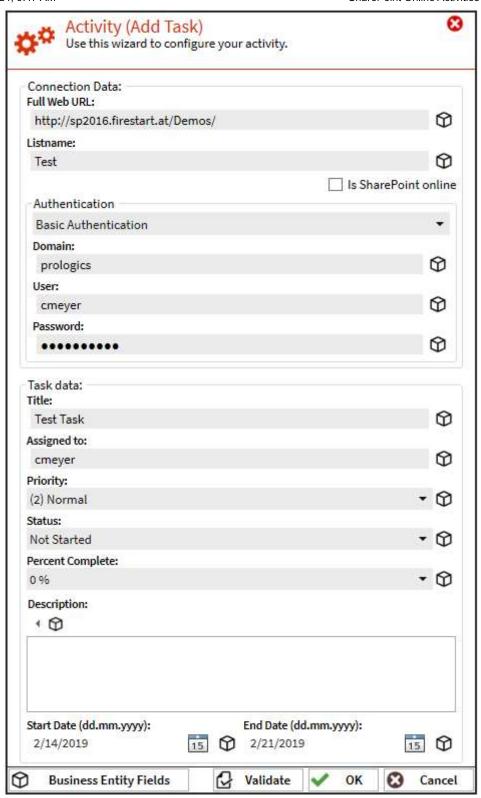


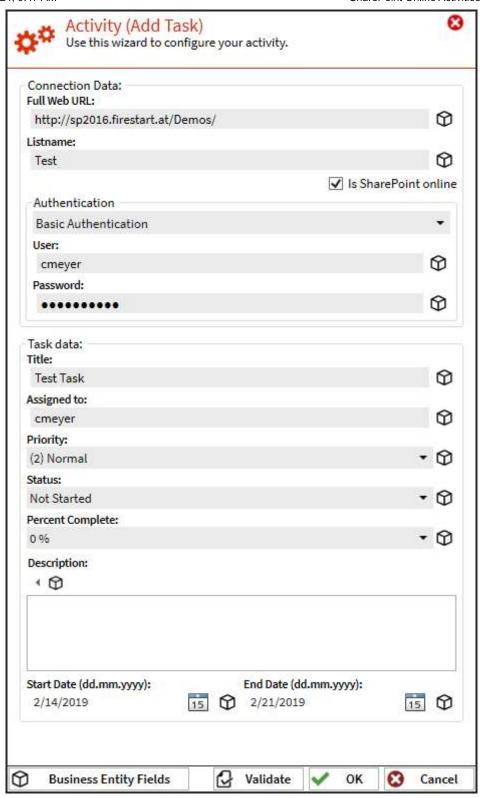


Add SharePoint Task

This activity allows you to create a task within a SharePoint task list. The title, priority, status, progress, description, start, and end date can be set.



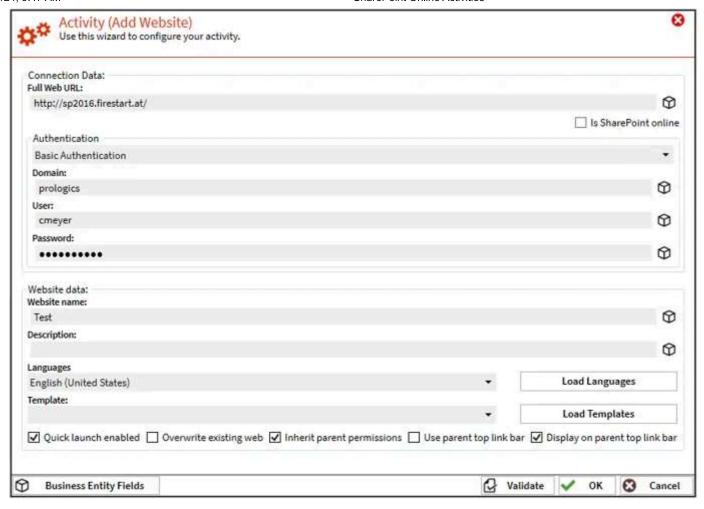


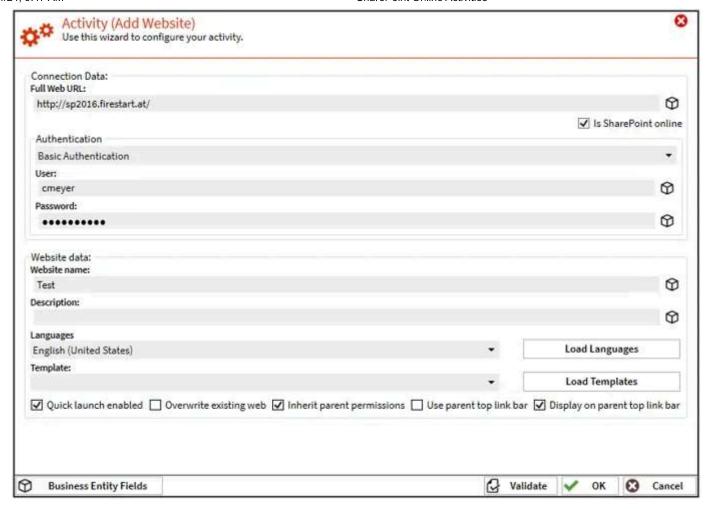


Add SharePoint Website

This activity allows you to create a site within SharePoint. The name, the description and the template to be used can be set. If the Website is inside a folder, is it possible to choose if it should inherit parent permissions or not. With the checkbox Use parent, top link bar is it possible to set this website link to the parent top bar.







Delete SharePoint List

This activity allows you to delete a list in SharePoint. There is the option to permanently delete it, otherwise, it will be moved to the recycle bin.



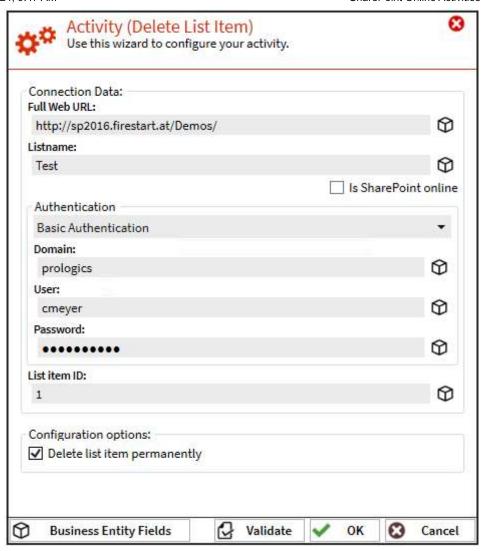


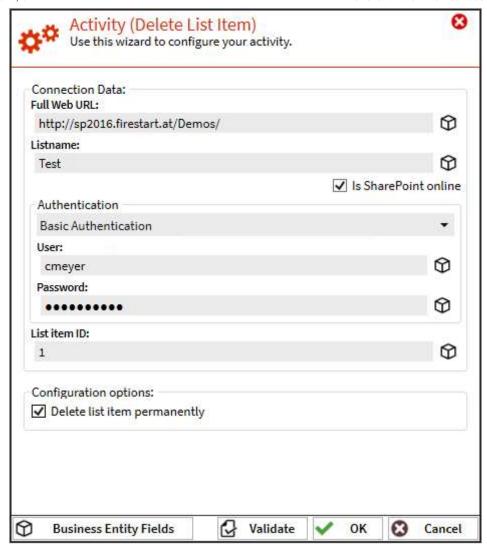


Delete SharePoint List Item

This activity allows you to delete the currently selected list entry in SharePoint, in case the checkbox Delete list Item permanently is not checked, then the list Item will be archived.



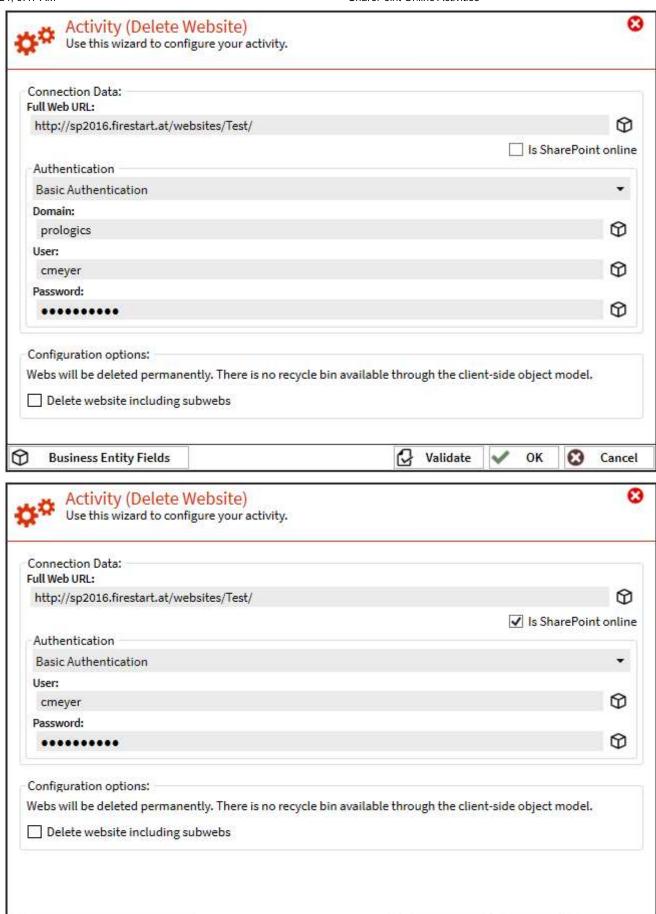




Delete SharePoint Website

This activity allows you to delete a site in SharePoint. There is the option to permanently delete it, otherwise, it will be moved to the recycle bin.





Validate

OK

Cancel

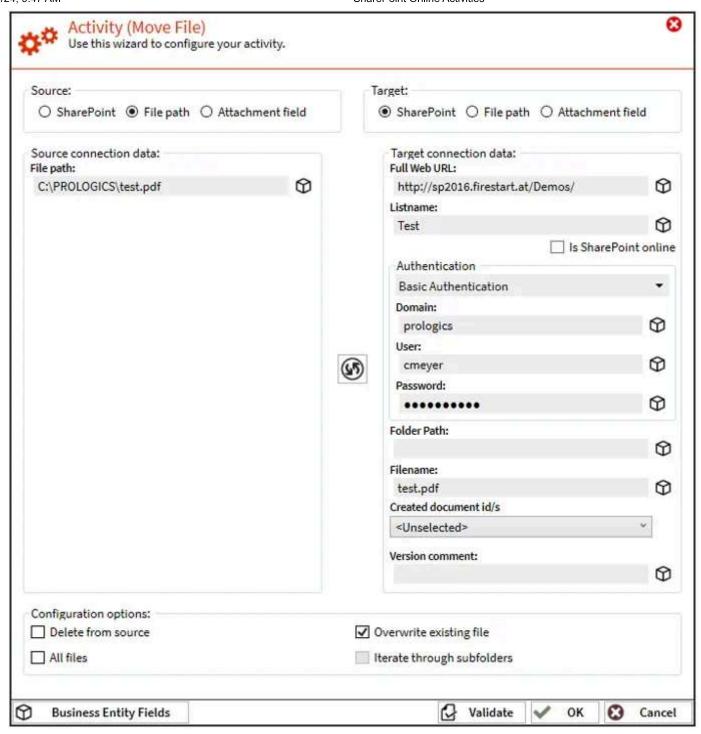
Business Entity Fields

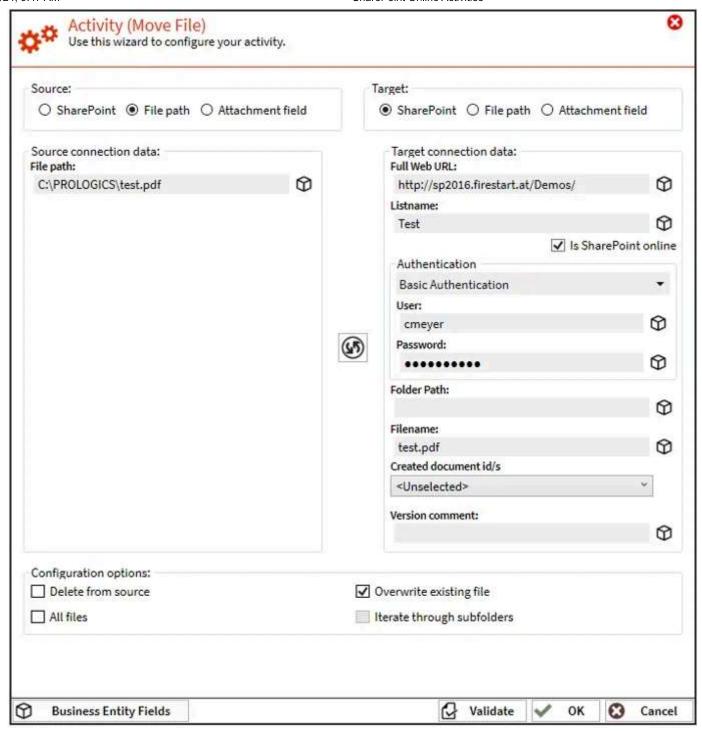
0

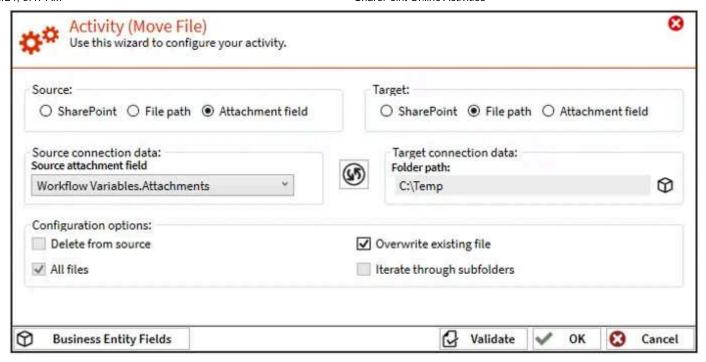
Move File

With this activity, it is possible to move files between the local file system and SharePoint document libraries. With the checkbox "Is SharePoint Online", it can be chosen whether SharePoint is used online or not. The middle button allows you to swap the two configured columns. The check box overwrites the existing file will overwrite the file in the target in case a file with a file name already exists in this location, note that this configuration is not available in Business Entities. With the option Iterate through subfolder, if the target is local or SharePoint, then the same will be applied also to the subfolders of the target.







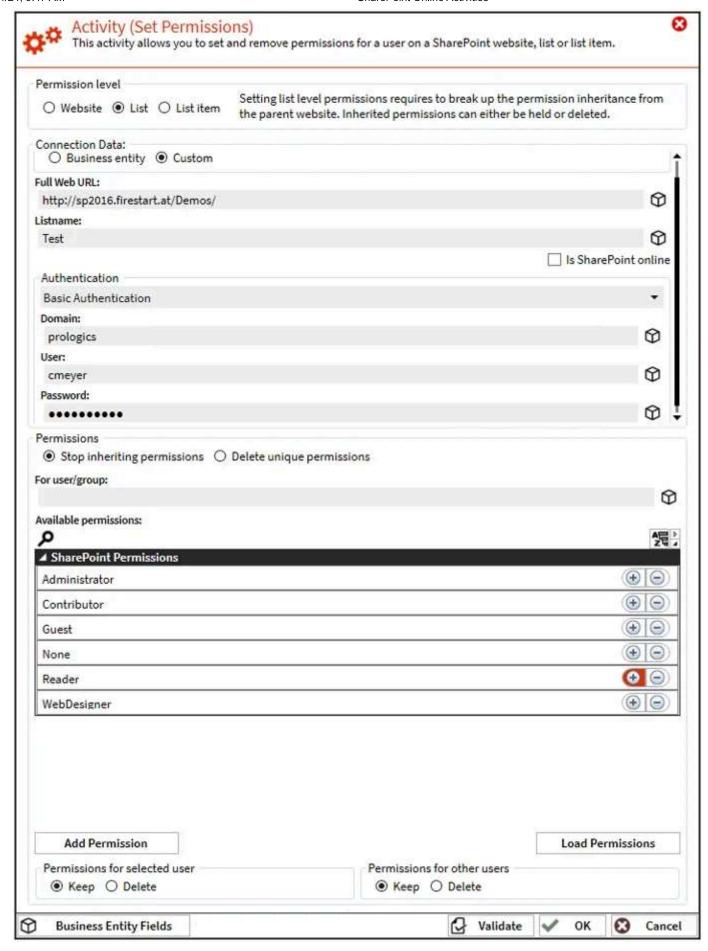


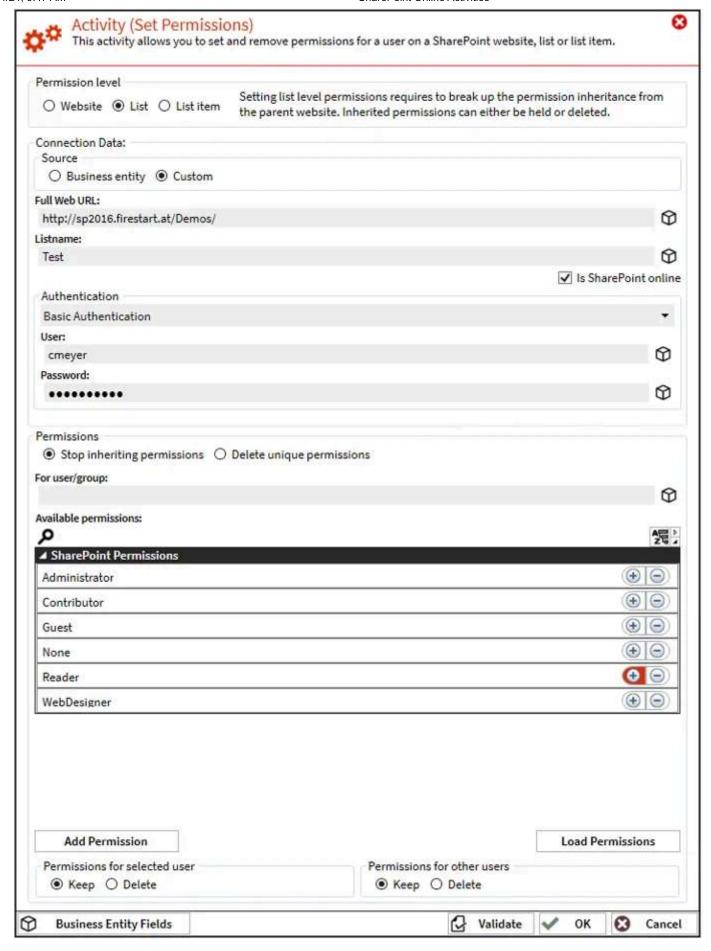
Note: There are two ways of how the textbox of the path is named, which is the **Folder path** and **File path**. This is important as you have to enter the whole path which includes the name of the file or just the path to the folder where the file should be stored into or taken from.

Set SharePoint Permissions

This activity can manage the permissions of a SharePoint object. With the radio buttons under Source, you can set whether you want to specify the data source manually (Custom) or use the connection data of bound business entities (BusinessEntity). Once valid connection data is specified, a list of permissions can be loaded with a click on Load Permissions. The Add Permission button can be used to create additional fields in the list to dynamically add permissions. In the for user/group field, specify which user/group the permissions should be set for. It is possible to determine how to deal with permissions inherited from the parent object to the child object. With the checkbox "Is SharePoint Online", it can be chosen whether SharePoint is used online or not.



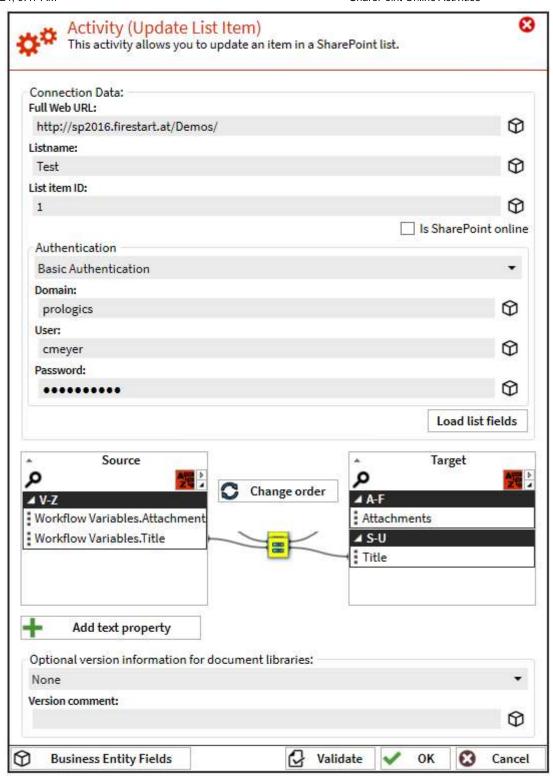


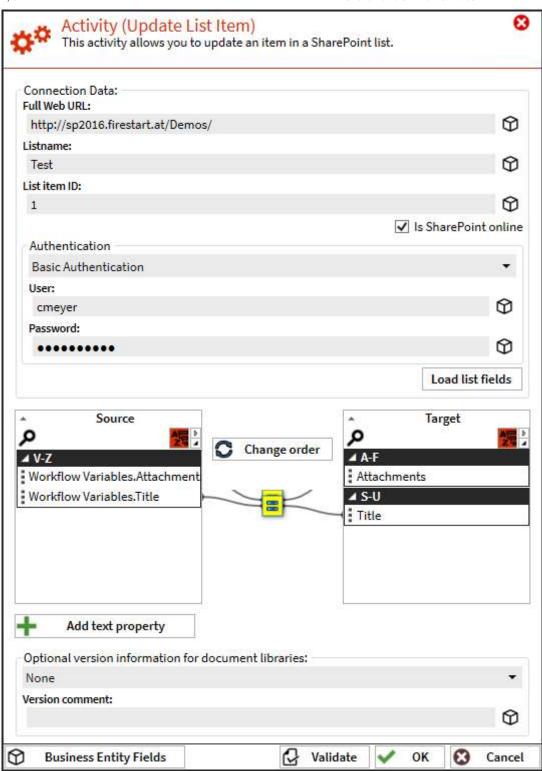


Update List Item

This activity allows the automated update of a list entry in SharePoint. If the connection is successful, all the column names of the list are loaded. The columns can be mapped to workflow variables and business entity links in order to update the value. In the Optional version information for documents libraries box is possible to set the type of version, if desired, and also its comment.







Was this article helpful? Yes No