



Activities ▼



< Back to home

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 one 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.






Activity (Add List)

Use this wizard to configure your activity.





Connection Data:


Full Web URL:


☐ Is SharePoint online


Authentication
Basic Authentication ▾


Domain:


User:


Password:






List data:


Listname:


Description:


Template:
 ▾

☒ Quick launch enabled ☐ Overwrite existing list

 Business Entity Fields  Validate  OK  Cancel

 **Activity (Add List)**
Use this wizard to configure your activity.

Connection Data:

Full Web URL:

☒ Is SharePoint online

Authentication

Basic Authentication

User:

Password:

List data:

Listname:

Description:

Template:
Custom List

☒ Quick launch enabled ☐ Overwrite existing list

Load Templates

Business Entity Fields

Validate


OK

Cancel

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.





Activity (Add List Item)

This activity allows you to add an item in a SharePoint list which is not bound by a business entity item. It is also possible to set initial values and permissions for that

Connection Data:

Full Web URL:

Listname:

☒ Is SharePoint online

Authentication

User:

Password:

Source

V-Z

- Workflow Variables.Attachme.
- Workflow Variables.Title

Target

A-F

- Attachments

S-U

- Title


Change order

Output Data:
Item ID:

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.







Activity (Add Task)

Use this wizard to configure your activity.




Connection Data:


Full Web URL:
 


Listname:
 


☐ Is SharePoint online

Authentication





Domain:
 



User:
 



Password:
 



Task data:



Title:
 





Assigned to:
 





Priority:
  



Status:
  



Percent Complete:
  

Description:
 

Start Date (dd.mm.yyyy):
   End Date (dd.mm.yyyy):
  



 Business Entity Fields  Validate  OK  Cancel



**Activity (Add Task)**
Use this wizard to configure your activity.

Connection Data:
Full Web URL:

Listname:

☒ Is SharePoint online


Authentication

Basic Authentication


User:

Password:


Task data:
Title:

Assigned to:

Priority:



(2) Normal






Status:





Not Started


Percent Complete:

0 %


Description:



Start Date (dd.mm.yyyy):   **End Date (dd.mm.yyyy):**  

 Business Entity Fields  Validate  OK  Cancel

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.



 **Activity (Add Website)**
Use this wizard to configure your activity.

Connection Data:

Full Web URL:

☐ Is SharePoint online

Authentication

Basic Authentication

Domain:

User:

Password:

Website data:

Website name:

Description:

Languages

Template:

☒ Quick launch enabled ☐ Overwrite existing web ☒ Inherit parent permissions ☐ Use parent top link bar ☒ Display on parent top link bar

Load Languages


Load Templates

Business Entity Fields

Validate

OK

Cancel

 **Activity (Add Website)**
Use this wizard to configure your activity.

Connection Data:

Full Web URL:

☒ Is SharePoint online

Authentication

Basic Authentication

User:

Password:

Website data:

Website name:

Description:

Languages

Template:

☒ Quick launch enabled ☐ Overwrite existing web ☒ Inherit parent permissions ☐ Use parent top link bar ☒ Display on parent top link bar

Business Entity Fields

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.





Activity (Delete List)

Use this wizard to configure your activity.

Connection Data:

Full Web URL:

Listname:

☐ Is SharePoint online



Authentication
Basic Authentication


Domain:

User:

Password:

Configuration options:
☐ Delete list permanently

 Business Entity Fields  Validate  OK  Cancel



Activity (Delete List)

Use this wizard to configure your activity.

Connection Data:

Full Web URL:

Listname:




☒ Is SharePoint online

Authentication
Basic Authentication

User:

Password:


Configuration options:
☐ Delete list permanently

 Business Entity Fields  Validate  OK  Cancel

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.







Activity (Delete List Item)

Use this wizard to configure your activity.




Connection Data:


Full Web URL:



Listname:



☐ Is SharePoint online

Authentication
Basic Authentication ▾





Domain:




User:


Password:



List item ID:



Configuration options:
☒ Delete list item permanently

 Business Entity Fields  Validate  OK  Cancel


**Activity (Delete List Item)**
Use this wizard to configure your activity.


Connection Data:


Full Web URL:


Listname:

☒ Is SharePoint online





Authentication
Basic Authentication

User:


Password:


List item ID:



Configuration options:
☒ Delete list item permanently

 Business Entity Fields  Validate  OK  Cancel

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.





Activity (Delete Website)

Use this wizard to configure your activity.

Connection Data:

Full Web URL:

☐ Is SharePoint online

Authentication
Basic Authentication

Domain:


User:


Password:


Configuration options:


Webs will be deleted permanently. There is no recycle bin available through the client-side object model.

☐ Delete website including subwebs

 Business Entity Fields

 Validate

 OK

 Cancel



Activity (Delete Website)

Use this wizard to configure your activity.

Connection Data:

Full Web URL:

☒ Is SharePoint online

Authentication
Basic Authentication


User:


Password:


Configuration options:

Webs will be deleted permanently. There is no recycle bin available through the client-side object model.

☐ Delete website including subwebs

 Business Entity Fields

 Validate


 OK

 Cancel

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.





Activity (Move File)

Use this wizard to configure your activity.

Source:

☐ SharePoint ☒ File path ☐ Attachment field

Source connection data:

File path:

C:\PROLOGICS\test.pdf

Target:

☒ SharePoint ☐ File path ☐ Attachment field

Target connection data:

Full Web URL:

http://sp2016.firestart.at/Demos/

Listname:

Test

☐ Is SharePoint online

Authentication

Basic Authentication

Domain:

prologics

User:

cmeyer

Password:

.....

Folder Path:

Filename:

test.pdf

Created document id/s

<Unselected>

Version comment:


Configuration options:

☐ Delete from source ☒ Overwrite existing file

☐ All files ☐ Iterate through subfolders

Business Entity Fields


Validate OK Cancel



Activity (Move File)










Use this wizard to configure your activity.

Source:
☐ SharePoint ☒ File path ☐ Attachment field


Source connection data:
File path:
C:\PROLOGICS\test.pdf 




Configuration options:
☐ Delete from source
☐ All files

Target:
☒ SharePoint ☐ File path ☐ Attachment field

Target connection data:
Full Web URL:
http://sp2016.firestart.at/Demos/ 
Listname:
Test 
☒ Is SharePoint online
Authentication
Basic Authentication 
User:
cmeyer 
Password:
..... 
Folder Path:

Filename:
test.pdf 
Created document id/s
<Unselected> 
Version comment:


☒ Overwrite existing file
☐ Iterate through subfolders

 Business Entity Fields

 Validate  OK  Cancel

Activity (Move File)
Use this wizard to configure your activity.

Source:
☐ SharePoint ☐ File path ☒ Attachment field

Source connection data:
 Source attachment field
 Workflow Variables.Attachments

Target:
☐ SharePoint ☒ File path ☐ Attachment field

Target connection data:
 Folder path:
 C:\Temp

Configuration options:
☐ Delete from source ☒ Overwrite existing file
☒ All files ☐ Iterate through subfolders


Business Entity Fields Validate OK Cancel

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.





Activity (Set Permissions)

This activity allows you to set and remove permissions for a user on a SharePoint website, list or list item.

Permission level

☐ Website ☒ List ☐ List item

Setting list level permissions requires to break up the permission inheritance from the parent website. Inherited permissions can either be held or deleted.

Connection Data:

☐ Business entity ☒ Custom

Full Web URL:

Listname:

☐ Is SharePoint online

Authentication

Domain:

User:

Password:

Permissions

☒ Stop inheriting permissions ☐ Delete unique permissions


For user/group:

Available permissions:

SharePoint Permissions	
Administrator	<input type="button" value="+"/> <input type="button" value="-"/>
Contributor	<input type="button" value="+"/> <input type="button" value="-"/>
Guest	<input type="button" value="+"/> <input type="button" value="-"/>
None	<input type="button" value="+"/> <input type="button" value="-"/>
Reader	<input checked="" type="button" value="+"/> <input type="button" value="-"/>
WebDesigner	<input type="button" value="+"/> <input type="button" value="-"/>

Permissions for selected user ☐ Keep ☐ Delete

Permissions for other users ☒ Keep ☐ Delete



Activity (Set Permissions)

This activity allows you to set and remove permissions for a user on a SharePoint website, list or list item.

Permission level

☐ Website ☒ List ☐ List item

Setting list level permissions requires to break up the permission inheritance from the parent website. Inherited permissions can either be held or deleted.

Connection Data:

Source

☐ Business entity ☒ Custom

Full Web URL:

Listname:

☒ Is SharePoint online

Authentication

User:


Password:

Permissions

☒ Stop inheriting permissions ☐ Delete unique permissions

For user/group:

Available permissions:




SharePoint Permissions	
Administrator	<input type="button" value="+"/> <input type="button" value="-"/>
Contributor	<input type="button" value="+"/> <input type="button" value="-"/>
Guest	<input type="button" value="+"/> <input type="button" value="-"/>
None	<input type="button" value="+"/> <input type="button" value="-"/>
Reader	<input checked="" type="button" value="+"/> <input type="button" value="-"/>
WebDesigner	<input type="button" value="+"/> <input type="button" value="-"/>

Permissions for selected user

☒ Keep ☐ Delete

Permissions for other users


☒ Keep ☐ Delete

 Business Entity Fields

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.





Activity (Update List Item)

This activity allows you to update an item in a SharePoint list.



Connection Data:

Full Web URL:

Listname:

List item ID:

☐ Is SharePoint online

Authentication
Basic Authentication

Domain:

User:

Password:

Source

V-Z

- Workflow Variables.Attachment
- Workflow Variables.Title

Target


A-F

- Attachments

S-U


- Title


Change order


 Add text property


Optional version information for document libraries:
None


Version comment:

 Business Entity Fields

 Validate

 OK

 Cancel



Activity (Update List Item)

This activity allows you to update an item in a SharePoint list.

Connection Data:

Full Web URL:

Listname:

List item ID:

☒ Is SharePoint online

Authentication
Basic Authentication

User:

Password:

Source

V-Z

- Workflow Variables.Attachment
- Workflow Variables.Title

Change order

Target

A-F

- Attachments

S-U

- Title

Optional version information for document libraries:
None

Version comment:

Was this article helpful?

Yes

No