



## Integrate Multi Value and Lookup Fields from SharePoint

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Documentation

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06.02.2015

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## SUMMARY

In this document you will be given a step-by-step documentation on how to integrate multi value (managed metadata, lookup, person/group or choice) and lookup fields (lookup or person/group) from SharePoint.

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## DOCUMENT DETAILS

Version: 1.0

Author: Johannes Linder

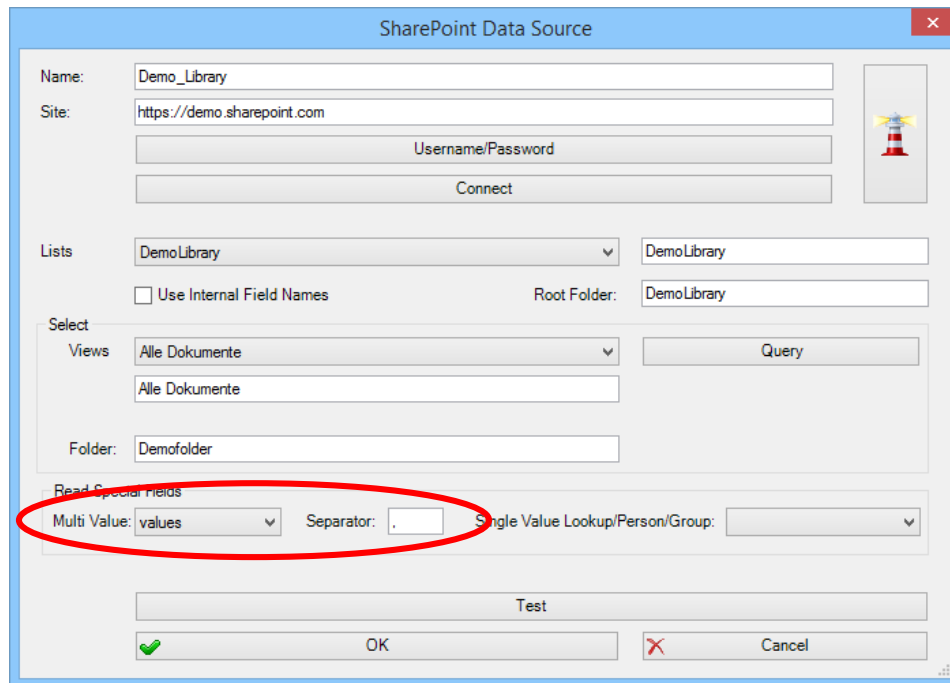
Date: February 6, 2015

# 1 INTEGRATION OF MULTI VALUE FIELDS

To start the integration please connect to your SharePoint or Office 365 environment and select the desired list/library that contains multi value fields. When integrating multi value fields you have two options – values or xml.

## 1.1 Integration of multi value fields using “values”

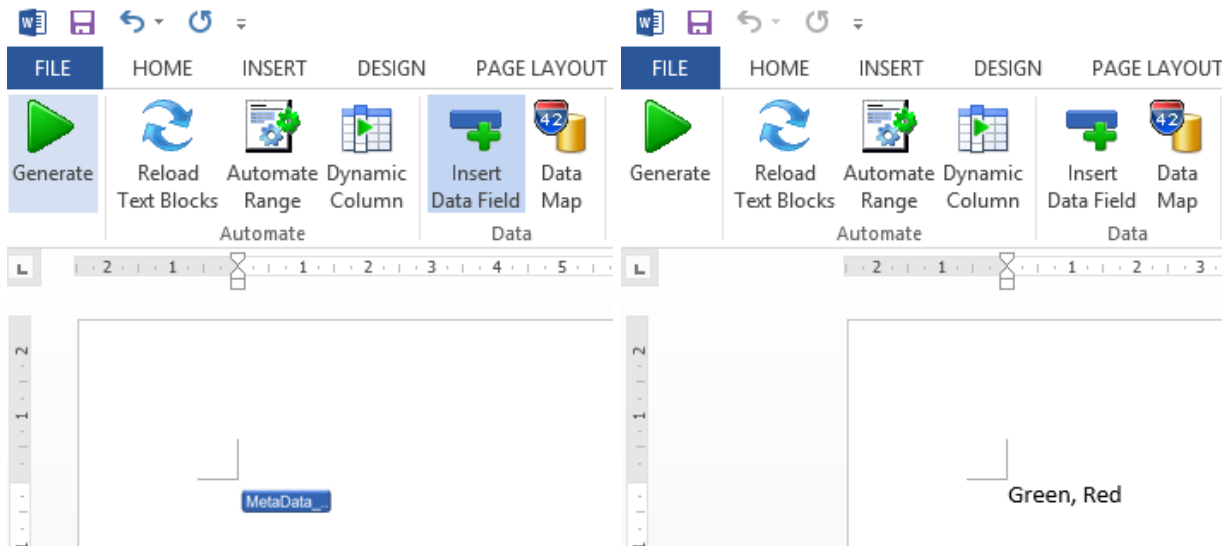
- a. If you want all data from the multi value field to be inserted as one data field that adds up the fields with a separator please use the option Multi Value = “values” and type in your separator.



- b. The multi value field “MetaData\_Test” will return the following when clicking on “Test”.

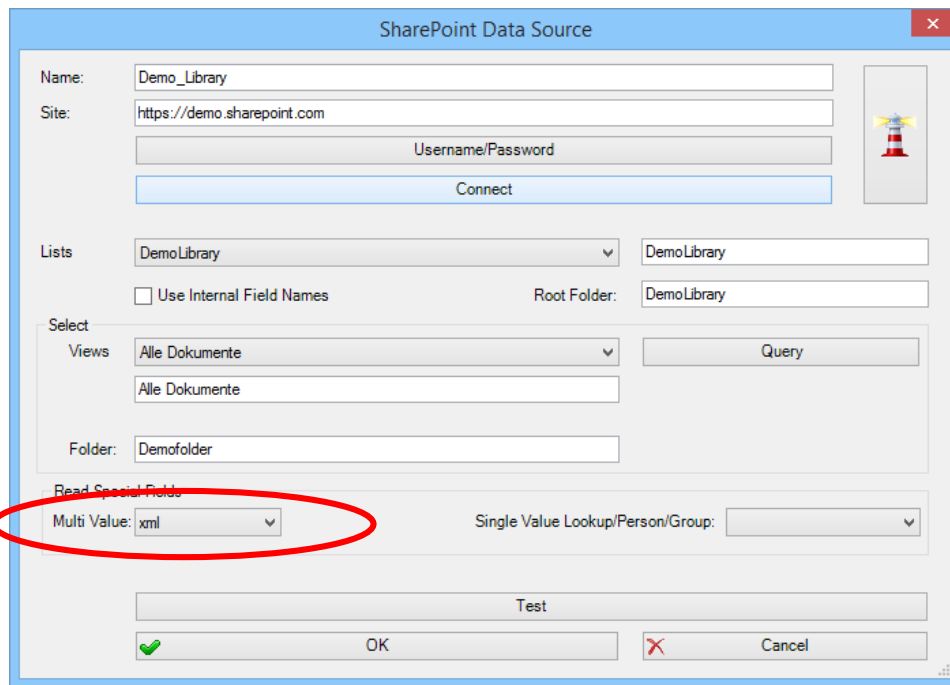
Demo_Library (1 records)				
	Name	title	MetaData_Test	created
▶	Document1.docx		Green, Red	26.01.2015 14:3...

c. Insert the multi value data field and generate the document.



## 1.2 Integration of multi value fields using "xml"

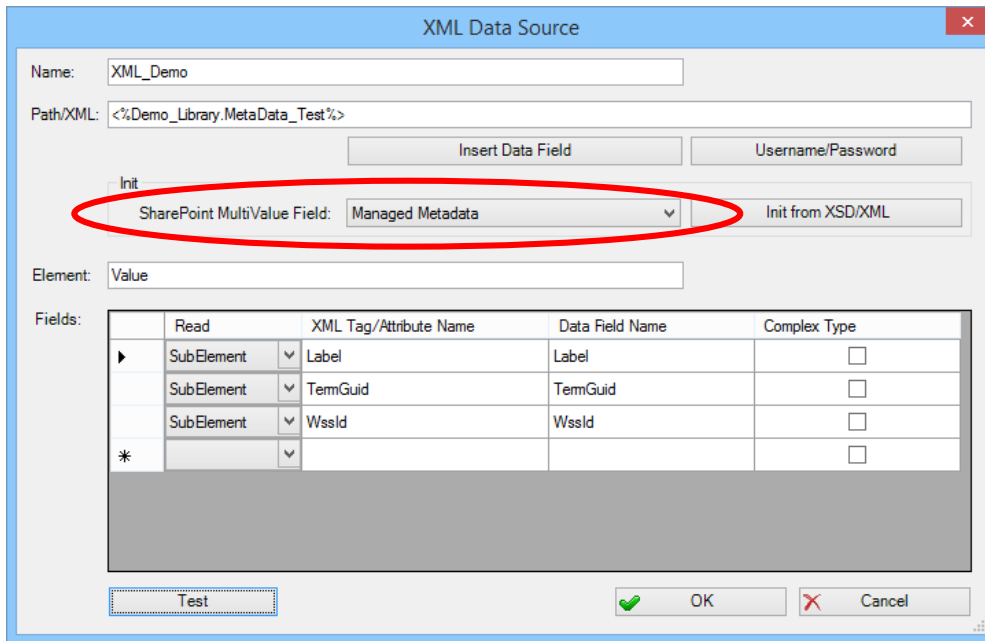
a. If you want to have all data from the multi value fields to be separated into individual data fields please select the option Multi Value = "xml"



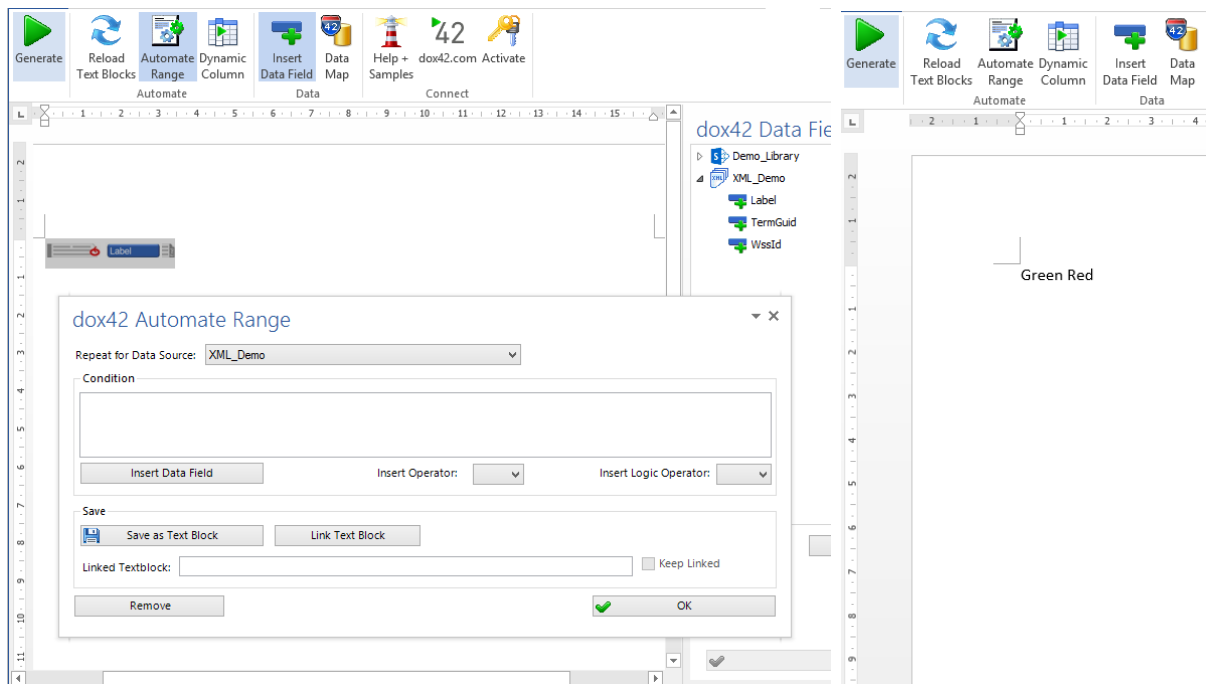
b. The multi value field "MetaData\_Test" will return the following when clicking on "Test".

Demo_Library (1 records)		
	title	MetaData_Test
▶	1.docx	<MetaData><Value><Label><[CDATA[Green]]><Label><TemGuid>ba2db235-a448-4e4e-a2aa-0506e7d06ec8</TemGuid><Wss...

- c. Add a new XML Data Source and select the multi value field using "Insert Data Field". Initialize the "SharePoint MultiValue Field" as "Managed Metadata", "Lookup" or "Person Group".

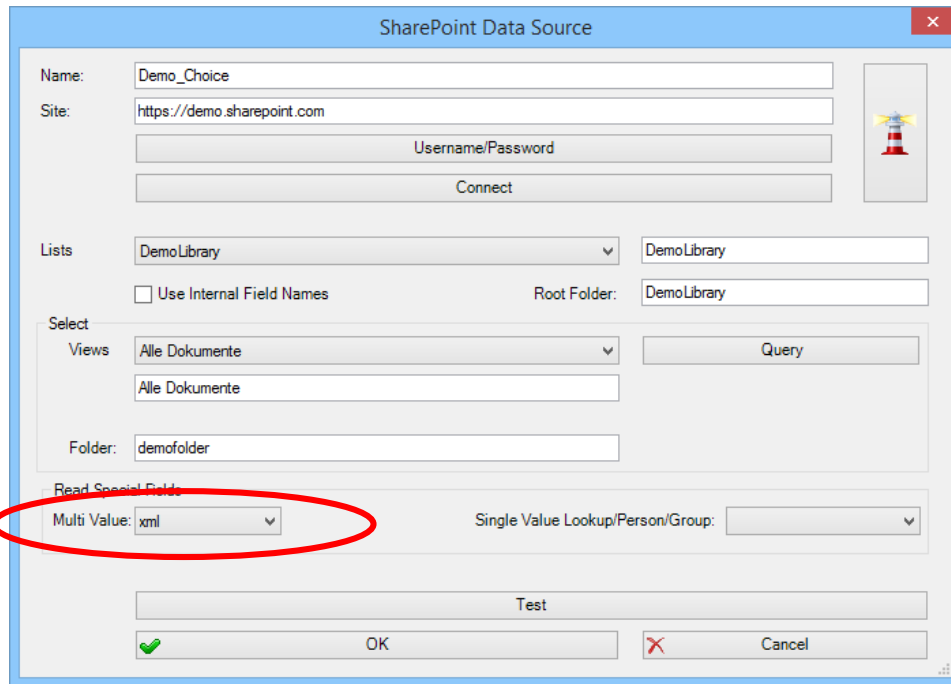


- d. Click on "Insert Data Field" in the dox42 Ribbon and insert the "Label" data field for managed metadata from the XML Data Source. Then create an "Automated Range", repeat for the XML Data Source and generate the document.

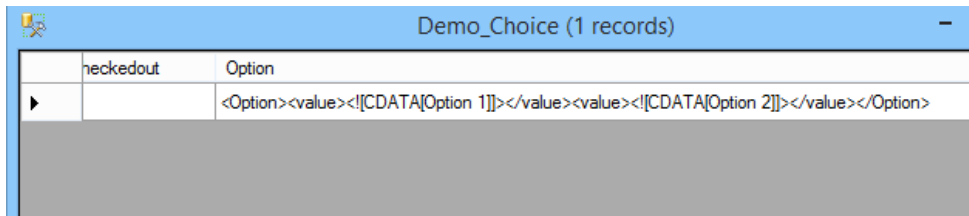


### 1.3 Integration of choice fields using "xml"

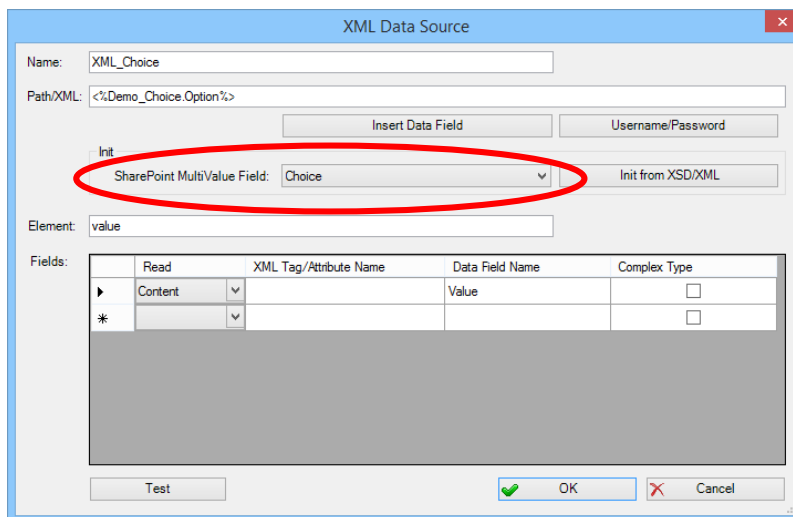
- a. If you want to have all data from the choice fields to be separated into individual data fields please select the option Multi Value = "xml".



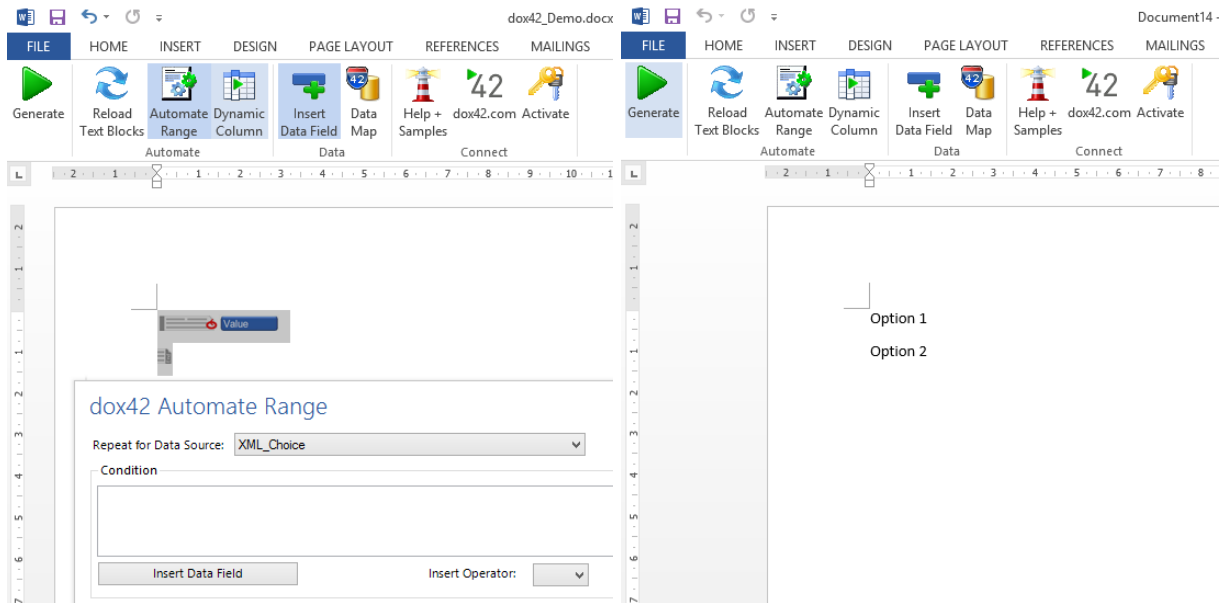
- b. The choice field "Option" will return the following when clicking on "Test".



- c. Add a new XML Data Source and select the choice field using "Insert Data Field" and initialize the "SharePoint MultiValue Field" as "Choice".



- d. Click on "Insert Data Field" in the dox42 Ribbon and insert the "Value" data field for choice data from the XML Data Source. Then create an "Automated Range", repeat for the XML Data Source and generate the document.

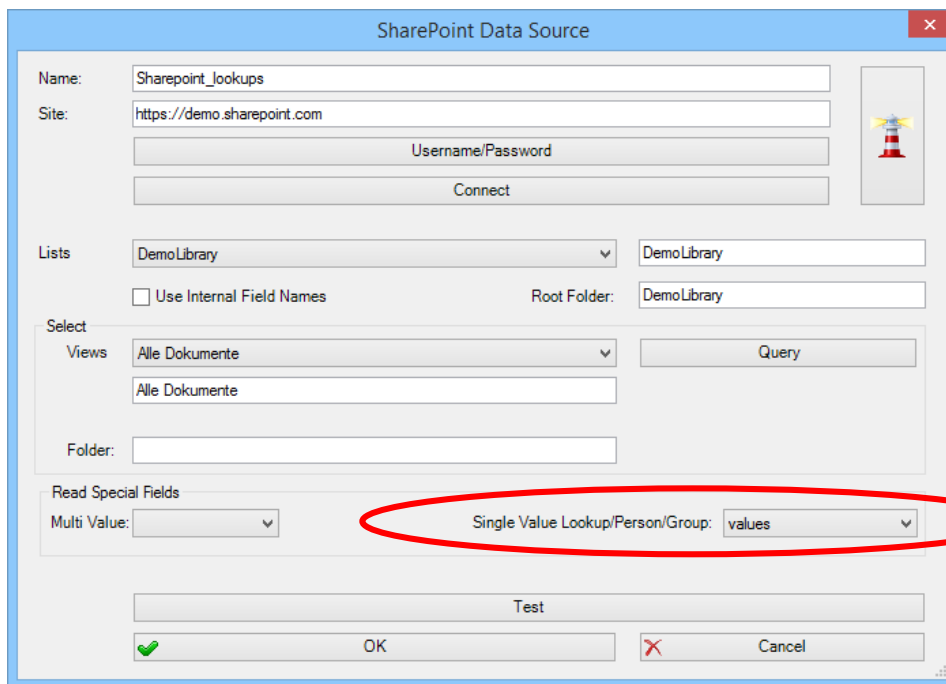


## 2 INTEGRATION OF SINGLE VALUE LOOKUP OR PERSON/GROUP FIELDS

To start the integration please connect to your SharePoint or Office 365 environment and select the desired library that contains single value lookup or person/group fields. When importing lookups you have three options – values, id or xml.

### 2.1 Integration of single value lookup or person/group fields using “values” or “id”

- a. In Single Value Lookup/Person/Group you can select either “values” or “id” to be returned from the SharePoint Data Source directly.

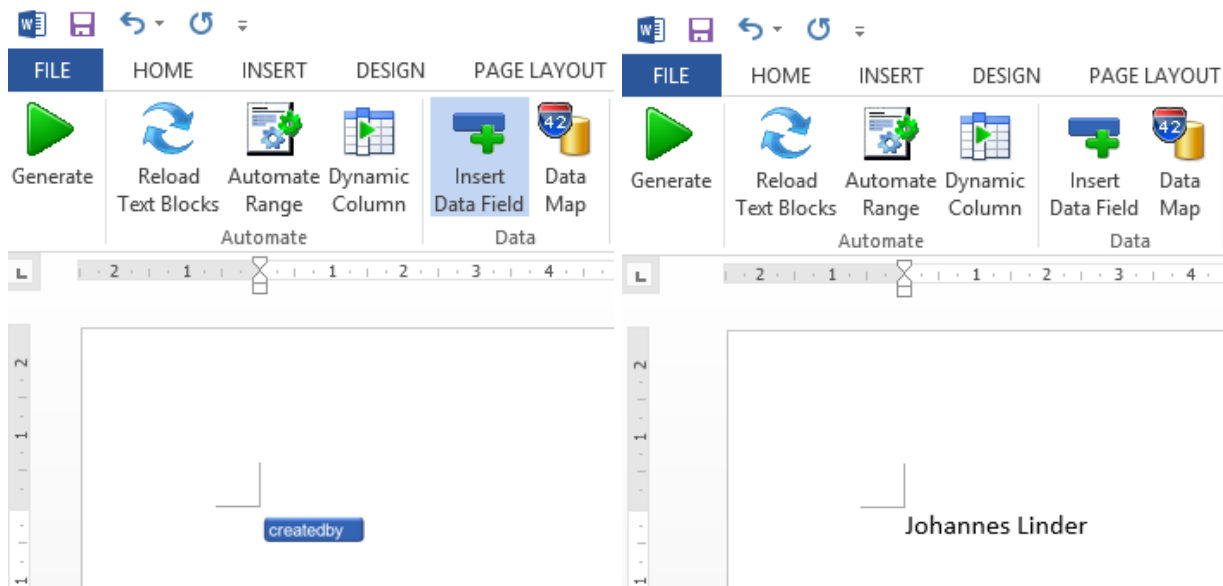


- b. The lookup field “createdby” will return the following “value” when clicking on “Test”.

Sharepoint_lookups (1 records)						
	Name	title	MetaData_Test	created	edited	createdby
▶	Demofolder		<MetaData></M...	26.01.2015 14:3...	26.01.2015 14:3...	Johannes Linder

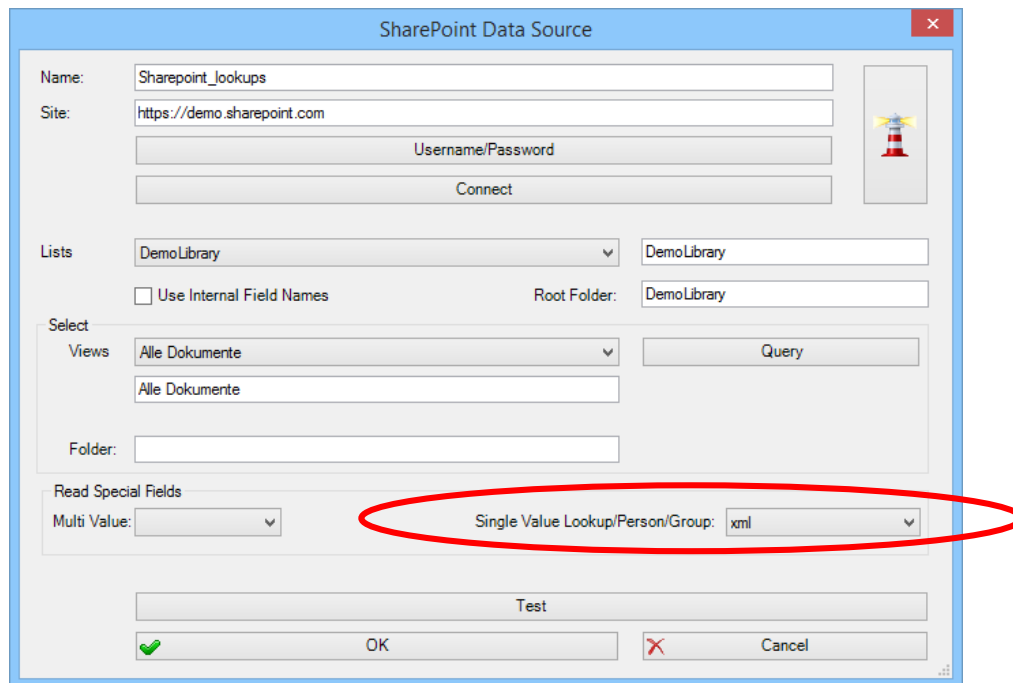


c. Insert the lookup data field and generate the document.

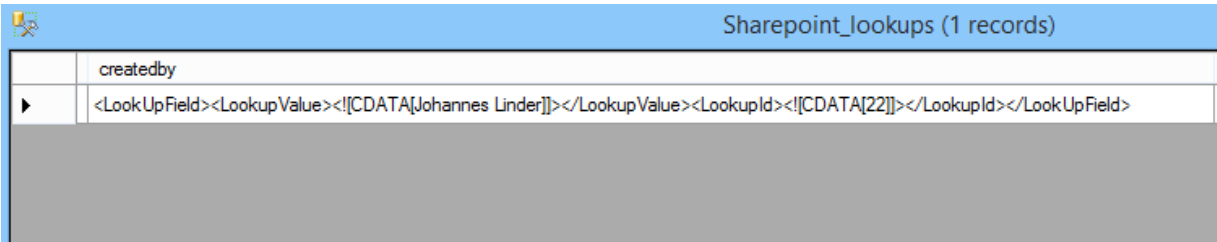


## 2.2 Integration of single value lookup or person/group fields using "xml"

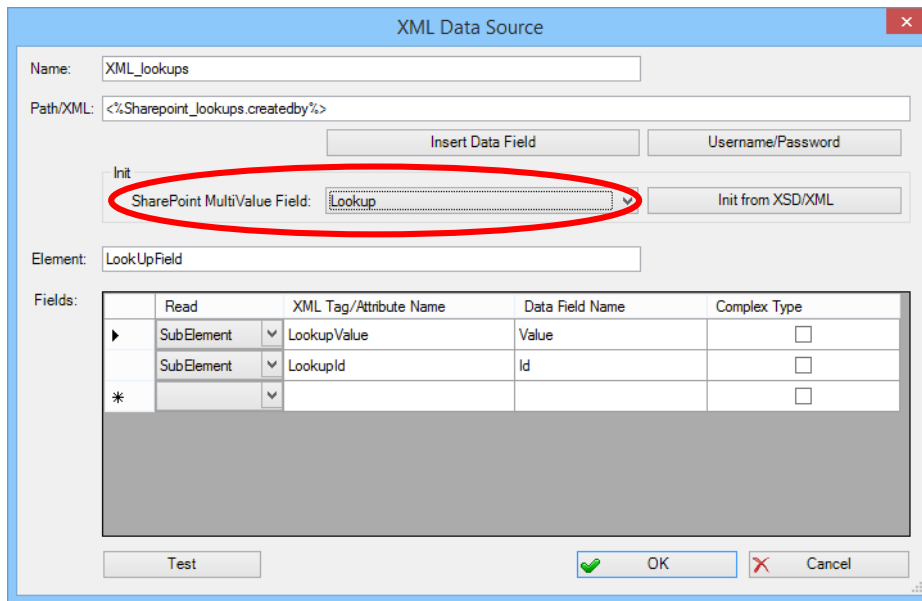
a. If you want to have both "value" and "id" from the lookup or person/group field please select the option Single Value Lookup/Person/Group = "xml"



b. The lookup field "createdby" will return the following "xml" when clicking on "Test".



c. Add a new XML Data Source and select the lookup or person/group field clicking on "Insert Data Field". Then initialize the "SharePoint MultiValue Field" as "Lookup" or "Person/Group".



d. Click on "Insert Data Field" in the dox42 ribbon, insert the "Value" and "Id" data field from the XML Data Source and generate the document

