

Integrate Multi Value and Lookup Fields from SharePoint

Documentation

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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.

CONTENTS

S	ummar	ſŸ	2
С	ontent	, S	2
Г		ent Details	2
1	Inte	paration of Multi Value Fields	ייי <i>ב</i>
Т	1 1		
	1.1	Integration of multi value fields using values	3
	1.2	Integration of multi value using "xml"	4
	1.3	Integration of choice fields using "xml"	6
2	Inte	egration of Single Value Lookup or Person/Group Fields	8
	2.1	Integration of single value lookup or person/group fields using "values" or "id"	8
	2.2	Integration of single value lookup or person/group fields using "xml"	9

DOCUMENT DETAILS

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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.

	SharePoint Data Source		
Name:	Demo_Library		
Site:	https://demo.sharepoint.com		785
	Username/Password		1
	Connect		
Lists	DemoLibrary v	DemoLibrary	
	Use Internal Field Names Root Folder:	DemoLibrary	
Select			
Views	Alle Dokumente 🗸	Query	
	Alle Dokumente		
Folder:	Demofolder		
Read Spee	ndi ricids		
Multi Value	E values v Separator: ,ngle Value Lookup/f	Person/Group:	*
	Tast		
	1651		
	I OK	X Cancel	

b. The multi value field "MetaData_Test" will return the following when clicking on "Test".





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"

	SharePoi	nt Data Source		
Name:	Demo_Library			
Site:	https://demo.sharepoint.com			>35
	Userna	ame/Password		1
		Connect		
Lists	DemoLibrary	¥	DemoLibrary	
	Use Internal Field Names	Root Folder:	DemoLibrary	
Select				
Views	Alle Dokumente	¥	Query	
	Alle Dokumente			
Folder:	Demofolder			
Read Speci	d Polda			
Multi Value	xml V	Single Value Lookup/Pe	erson/Group:	
		Test		
		1031		
	V OK		X Cancel	

b. The multi value field "MetaData_Test" will return the following when clicking on "Test".



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".

ame:	XML_	XML_Demo									
ath/XML:	<%Demo_Library.MetaData_Test %>										
	Insert Data Field Username/Passwo										
<	lnit S	harePoint MultiVa	lue F	ield: Managed Metadata	Y	Init from XSD/XML					
Element:	Value										
Fields:		Read		XML Tag/Attribute Name	Data Field Name	Complex Type					
	•	SubElement	Y	Label	Label						
		SubElement	Y	TemGuid	TemGuid						
		SubElement	¥	Wssld	Wssld						
	*		¥								

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.

Generate	Reload Automate Dynamic Insert Data Yata Yata Text Blocks Range Column Data Connect	Generate	Reload Automate Dynamic Text Blocks Range Column Data Field Map
- 1 2	1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 - 11 - 12 - 13 - 14 - 15 - 7 A Cox42 Data Fie S Demo_Library A Mu_Demo Label TermGuid Westd	2	Automate Data
	cox42 Automate Range Repeat for Data Source: XML_Demo Condition Insert Data Field Insert Operator: Insert Data Field Insert Operator: Save Save Save Save Linked Textblock: Keep Linked	1 • 7 • 1 • 6 • 1 • 5 • 1 • 4 • 1 • 3 • 1 • 2 • 1 • 1	
• 11 • 10 •	Remove OK	- - - - -	

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".

	SharePoin	t Data Source		
Name:	Demo_Choice]
Site:	https://demo.sharepoint.com			<u>></u>
	Usernar	ne/Password		
	C	onnect		
Lists	DemoLibrary	¥	DemoLibrary	
	Use Internal Field Names	Root Folder:	DemoLibrary	
Select				
Views	Alle Dokumente	~	Query	
	Alle Dokumente			
Folder:	demofolder			
Read Spee	el Delde			
Multi Value	a xml 🗸	Single Value Lookup/Pe	erson/Group:	v
		Test		
	OK OK		× Cancel	

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

1		Demo_Choice (1 records) -
	neckedout	Option
•		<option><value><![CDATA[Option 1]]></value><value><![CDATA[Option 2]]></value></option>

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

				XML Data	Source	
Name:	XML_C	Choice				
Path/XML:	<%Den	no_Choice.Optic	on%>			
				Insert Da	ta Field	Username/Password
Flament	Sh	arePoint Multi∖	Value F	ield: Choice	~	Init from XSD/XML
Element.	Value	1				
Fields:		Read		XML Tag/Attribute Name	Data Field Name	Complex Type
	•	Content	~		Value	
	*		~			

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.

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FILE	HOME	INSERT	DESIGN	PAGE L	AYOUT	REFERENC	ES MAILIN	IGS	FILE	HOME	INSERT	DESIGN	N PAGE LAYOU	T REFI	ERENCES	MAILINGS
Generate	Reload Text Blocks	Automate Range	Dynamic Column	Insert Data Field	42 Data Map	Help + dox42 Samples	2 A		Generate	Reload Text Blocks	Automate Range	Dynamic Column	Insert Data Data Field Map	Help + Samples	42 dox42.com	Activate
_		Automate		Data	_	Con	nect				Automate		Data		Connect	
· · · · 5 · · · · 4 · · · 3 · · · 2 · · · 2 · · · 2 · · · 2 · · · 2 · · · 2 · · · 2	dox42 Repeat fo	2 Autor on	► Value mate R	ange		6 · · · · 7 · · · ·	8	v 	T				tion 1			· · 7 · · · § ·
7 . 1 . 6		Insert Data	Field			Insert Ope	rator:	¥	7 . 1 . 6							

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.

Name: Sharepoint_lookups Site: https://demo.sharepoint.com Username/Password Connect Lists DemoLibrary Use Internal Field Names Root Folder: Select Query Views Alle Dokumente Folder:	×		SharePoint Data Source		
Site: https://demo.sharepoint.com Username/Password Connect Lists DemoLibrary Use Internal Field Names Root Folder: DemoLibrary Select Views Alle Dokumente Folder: Read Special Fields Multi Value: Single Value Lookup/Person/Group: values Test				Sharepoint_lookups	Name:
Username/Password Connect Lists DemoLibrary Use Internal Field Names Root Folder: DemoLibrary Select Views Alle Dokumente Folder: Folder: Read Special Fields Multi Value: Views Vie	>35	28		https://demo.sharepoint.com	Site:
Connect Lists DemoLibrary Use Internal Field Names Root Folder: DemoLibrary DemoLibrary Select Views Alle Dokumente Query Alle Dokumente Read Special Fields Multi Value: Single Value Lookup/Person/Group: Values Test	1	1	Username/Password		
Lists DemoLibrary DemoLibrary DemoLibrary DemoLibrary Query Alle Dokumente Folder: Read Special Fields Multi Value: Single Value Lookup/Person/Group: values Test			Connect		
Lists DemoLibrary DemoLibrary Use Internal Field Names Root Folder: DemoLibrary Select Views Alle Dokumente Alle Dokumente Folder: Read Special Fields Multi Value: Views Vie					
Use Internal Field Names Root Folder: DemoLibrary Query Alle Dokumente Folder: Read Special Fields Multi Value: Single Value Lookup/Person/Group: values Test		DemoLibrary	¥	DemoLibrary	Lists
Select Views Alle Dokumente Query Alle Dokumente Folder: Read Special Fields Multi Value: Single Value Lookup/Person/Group: values Test		DemoLibrary	Root Folder:	Use Internal Field Names	
Views Alle Dokumente Query Alle Dokumente		-			Select
Alle Dokumente Folder: Read Special Fields Multi Value: ✓ Single Value Lookup/Person/Group: values		Query	¥	Alle Dokumente	Views
Folder: Read Special Fields Multi Value: Single Value Lookup/Person/Group: values Test				Alle Dokumente	
Read Special Fields Multi Value:					Folder
Read Special Helds Multi Value:					
Test		Person/Group: unluce	Single Value Lookup/R		Read Spec
Test	· ·	values	Single Value Lookuph	•	Mara Value
Test					
			Test		
V OK Cancel		X Cancel	ОК	~	

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><th>26.01.2015 14:3</th><th>26.01.2015 14:3</th><th>Johannes Linder</th><th></th></metadata>	26.01.2015 14:3	26.01.2015 14:3	Johannes Linder						

- w 🗄 🔒 5 • ত ∓ w 🗄 🔒 5-G Ŧ FILE HOME INSERT DESIGN PAGE LAYOUT FILE HOME INSERT DESIGN PAGE LAYOUT 42) 42 0 0 Generate Reload Automate Dynamic Insert Data Generate Reload Automate Dynamic Insert Data Text Blocks Range Column Data Field Map Text Blocks Range Column Data Field Map Automate Data Automate Data . . 2 . . . 1 . . 1 • 1 • + • 2 • + • 3 • + • 4 • + • ы. ы . . 2 . . . 1 . . . · 1 · · · 2 · · · 3 · · · 4 · · 1 . 1 . 2 - - 2 Johannes Linder createdby
- 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"

		SharePoint Data Source		×	
Name:	Sharepoint_lookups				
Site:	https://demo.sharepoint.com	>15			
		1			
Lists	DemoLibrary	~	DemoLibrary		
	Use Internal Field Names	Root Folder:	DemoLibrary		
Select					
Views	Alle Dokumente	¥	Query		
	Alle Dokumente				
Folder:					
Read Spec	ial Fields				
Multi Value		Single Value Lookup/P	erson/Group: xml	¥	
	 ✓ 	ОК	× Cancel		
				.::	

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

5	Sharepoint_lookups (1 records)
	createdby
►	<lookupfield><lookupvalue><![CDATA[Johannes Linder]]></lookupvalue><lookupid><![CDATA[22]]></lookupid></lookupfield>

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".

				XML Data So	urce		x		
Name:	XML_lookups								
Path/XML:	<%Sh	arepoint_lookups.							
				Insert Data F	Field	Username/Password			
Init SharePoint MultiValue Field: Lookup Init from XSD/XML Element: LookUpField									
Fields:	Read			XML Tag/Attribute Name	Data Field Name	Complex Type	1		
	•	SubElement	Y	LookupValue	Value				
		SubElement	¥	Lookupld	ld				
	*		¥						
		Test			🖌 ОК	× Cancel			

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

