Microsoft SharePoint Connector

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Overview

Send uploaded files from workflow responses directly to a destination OneDrive folder or SharePoint site with the Microsoft SharePoint Connector.

This connector is available as an Add-on for Team plans and higher when using FormAssembly Workflow. For those interested in purchasing this Add-on, please contact your Account Manager. If you do not have an Account Manager, please contact our Sales Team.

Requirements

To use the Microsoft SharePoint Connector, a FormAssembly user must

- be part of a Team plan or higher
- purchase the SharePoint Connector Add-on for their instance
- have Content Management user permissions enabled for their login
  - specifically, the Microsoft SharePoint Add-on must be enabled for the user account
- have a Microsoft Office 365 Personal Account or Business Plan that includes Microsoft SharePoint and OneDrive Cloud Services
  - (see Microsoft Business Plans here)
- use the connector on a FormAssembly Workflow

Note:

- If the user lacks the FormAssembly user permission to Microsoft SharePoint but the SharePoint connector step is configured in the workflow, the connector will be skipped.
- The Microsoft SharePoint Connector may not work for On-Premises Microsoft Office 365 environments. If using an On-Premises Microsoft Office 365 environment, check with your MS Administrator to see if this connector will work for your environment.

Add the Microsoft SharePoint Connector to your Workflow

Note: The Microsoft Sharepoint Connector is in Beta.

- Select **Add Step** and choose **Connector**
- Select **Microsoft SharePoint**

Configure the Connector Properties

Description Tab

Use the Description tab to add a Step Name and Step Description.

Authorization Tab

The **Authorization** dropdown lists all saved authorizations from all workflows owned by your user account. Select an existing authorization from the list or scroll to the bottom to create a **New Authorization**.

Create a New Authorization

- Select **New Authorization** from the Authorization dropdown list
- Enter a **Name** for the authorization
- Click **Authorize**

Grant access to Microsoft SharePoint.

- Sign in with your Microsoft 365 account credentials
- Complete any additional authentication steps configured for your account
- Accept the permissions requested by the FormAssembly Microsoft SharePoint Connector for your Microsoft 365 account
    - If you do not accept the permissions, you will be unable to use the connector
- Click **Save** to store and apply this authorization to the connector

Edit an Existing Authorization

- Select a saved authorization from the Authorization dropdown list
- Click **Edit** to modify authorization settings
- When complete, click **Save** to apply the changes to the saved authorization, or click **Save as New** to save the modified authorization as a new entry in the Authorization dropdown list.

Manage or Delete Authorizations

- Click **Manage** to view the Authorizations page

From the Authorizations page, an authorization can be revoked. When revoked, the authorization is deleted from all connectors. Ensure an authorization is not used in a live workflow before it is revoked, to prevent connector errors.

Note: Only the original creator of the authorization can manage it, ensuring security and control over sensitive configurations.

Configuration Tab

Send File

Select a file upload field from the dropdown

- The Send File dropdown displays a list of all file upload fields available in the workflow. Please note that the displayed list is limited to 15 lines. If the desired field is not shown in the list, type the field's name to search further.

Note: For more information on file upload fields and upload size restrictions, please see this article.

Destination

Select a destination folder from the dropdown

- The Destination dropdown displays a list of all SharePoint and OneDrive folders the authorized Microsoft 365 user account can access. Please note that the displayed list is limited to 15 lines. If the desired destination is not shown in the list, type the folder's name or path to search further.

Note:
- If expected folders do not appear after searching, check with your SharePoint administrator that the authorized account has appropriate permissions for the intended destination folder.
- Newly created SharePoint sites take approximately 30 minutes from site creation to populate in the Destination dropdown.

Destination Subfolder (optional)

There are two different ways to utilize the Destination Subfolder configuration option. The first is to name a destination subfolder the Send File will be sent to **statically** for every workflow response.

To do this, type in the name of a Destination Subfolder. If the named folder does not yet exist, the connector will create the folder the first time a response a workflow response is received.

The other method is to configure a **dynamic** Destination Subfolder by creating a subfolder naming convention. Using this alternative method, Send Files for each workflow response can be organized within their own folder separate from other workflow responses. This may be desirable in cases where you expect to receive workflow responses where file names are the same or are difficult to differentiate (if needed).

Accessing Variables to Create Dynamic Destination Subfolders

- Select the function (f) icon to open the WYSIWYG editor
- Select the alias dropdown from the toolbar to open a list of available variables

- Select an available variable from the list

For more information about variables, please see our documentation on Form Calculations.

Return (optional)

Utilize this section to capture the uploaded Send File's URL or ID within the Destination to be referenced later in the workflow. Use the **Add Variable** button to add one or more return variables, and complete the configuration steps to set the return variable's **Operation Result** and **Return Variable Destination**.

> **Requirement**: To collect return variable values, "Document ID Service" must be enabled on your SharePoint site collection. Please refer to this Microsoft resource for further details on how to enable this setting.

Operation Result

- Choose what type of Return Variable to create by selecting an Operation Result from the dropdown
  - **ID** - The ID of the file uploaded by the connector
  - **URL** - The assigned URL of the file uploaded

Return Variable Destination

- **Field** - Send the Operation Result to an existing form field in the workflow
  - Use the dropdown menu to select a text field where the Operation Result will be sent. The dropdown indicates which form each field originates from.

> **Note**:
> - When returning to a form field, the form field must exist in the**same form** as the configured Send File.
> - Only fields that allow text input are listed here. File upload fields, radio button fields, checkbox fields, multi-select fields, and dropdown fields are **not** listed.

- **Variable** - Set the Operation Result as a variable that can be referenced later in the workflow
  - Select an existing variable name from the dropdown or create a new custom variable.

> **Note**: If sending a return variable to a Microsoft Excel Connector, the Excel Connector must be located after the SharePoint Connector on the Workflow Map.

Actions and the Add Action Button

The SharePoint Connector may be configured to send data to more than one destination or subfolder by using multiple Actions. Use the **Add Action** button to create another Action for each additional destination you want to configure. Complete the configuration of the send file, destination, optional destination subfolder, and optional return section for each action.

Delete an action by pressing the **Delete Action** button at the bottom of each action configuration.

Error Handling Tab

By default, if the connector encounters an error, the workflow terminates. To override this behavior, you can configure the error to redirect the workflow to another step by selecting a step from the **Upon Connector Error...** dropdown menu.

You may create a custom error message to display to your respondent. If a custom message is not added, the default connector error displays. To include the default message with your custom message, select the checkbox.