USER GUIDE

LIST SYNC SERVICE

THŌRAPPS

REFERENCES

This guide is part of **ThorApps – List Sync Service** product documentation. We encourage you to click through the links below to learn about using the ListSync app:

1. Installation Guide
2. Environment Setup Guide
3. User Guide (this document)
4. Purchasing Guide
5. Uninstall Guide

OVERVIEW

In this guide you will:

- Create and expose a SharePoint list for reporting
- Adding lists using Reporting Schemas
- Reflect SharePoint lists in a SharePoint Online environment
- Creating SSRS Reports from your list using Report Builder

PREREQUISITES

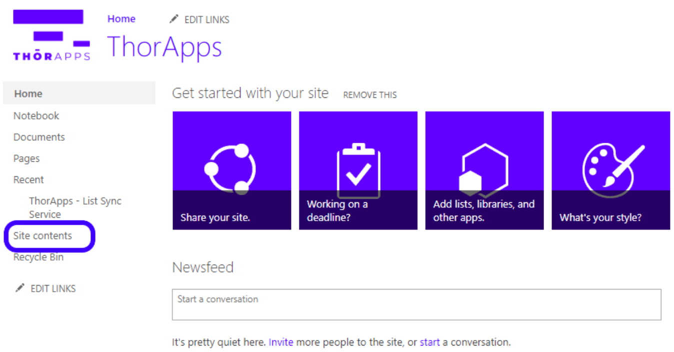
To follow this guide, you will need the following items:

- A SharePoint Online Site Collection with ThorApps List Sync Service installed and configured
- Access to Administer the SharePoint Online site collection
- An understanding of basic SharePoint terminology and navigation

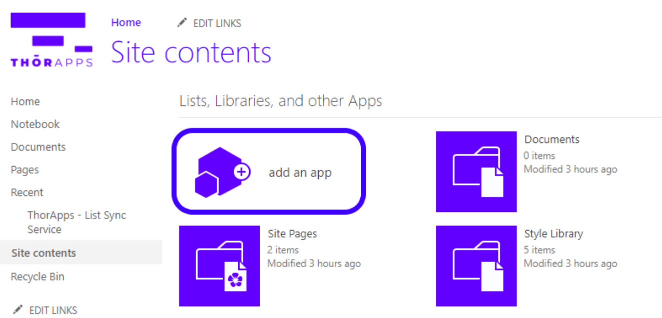
CREATE A SHAREPOINT LIST FOR REPORTING

Open a browser and navigate to the root of your site collection.

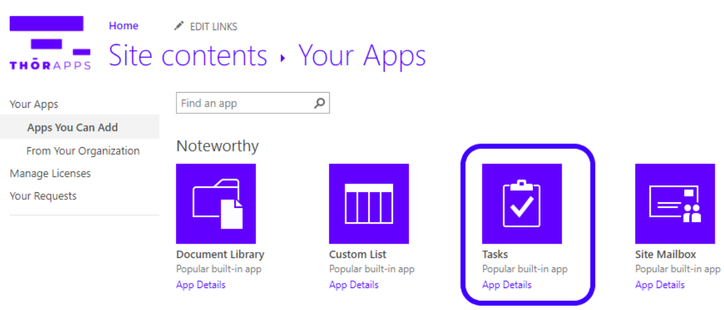
In the Quick Launch menu on the left, click “**Site Contents**”.



Click “**add an app**”.

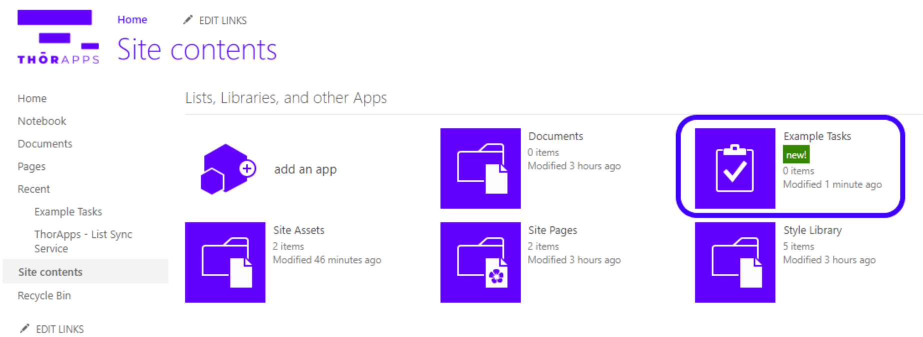


Create a new list and give it a name. Any list will do, we’ve used a “**Tasks**” list and called it “**Example Tasks**”.

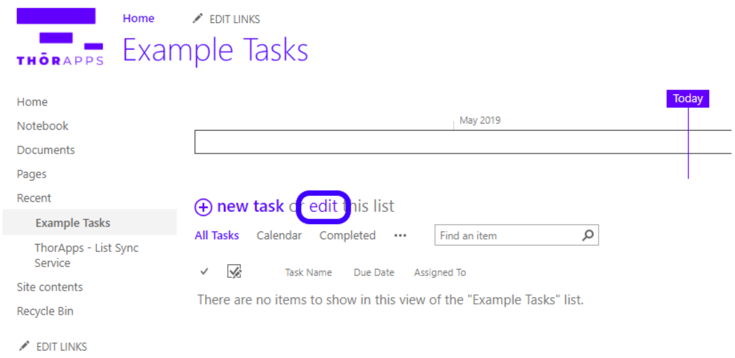


Once you have given it a name, click “**Create**”.

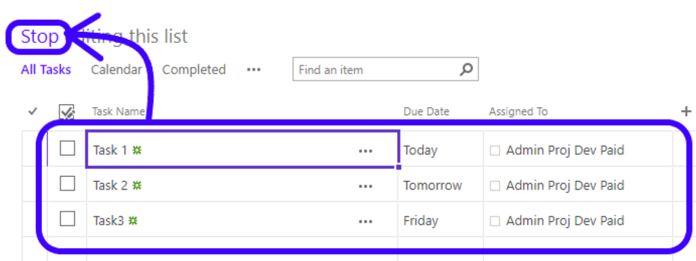
Once the list is created, click on it.



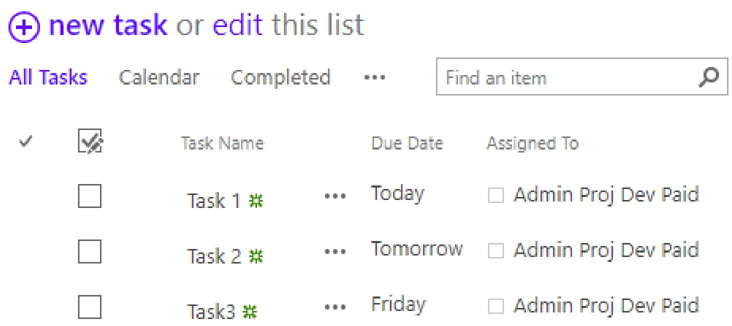
Click the “**edit**” link to add some example data.



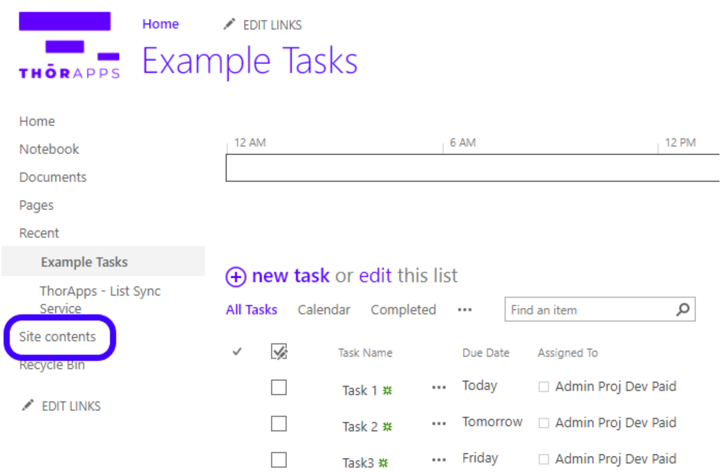
Add a few rows of example data and click “**Stop**”.



You will be returned to the default view of the list.



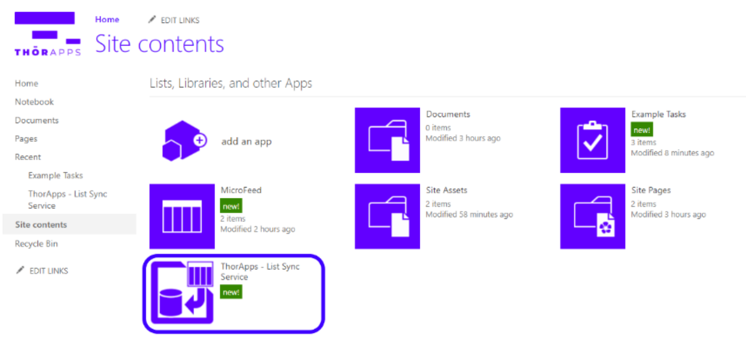
In the Quick Launch menu on the left, click “**Site Contents**” to return to the Site Contents page.



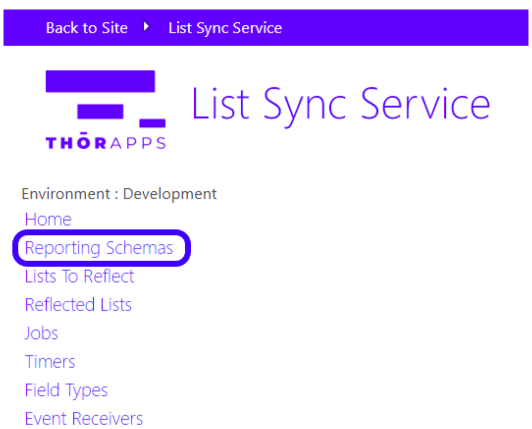
ADDING LISTS USING REPORTING SCHEMAS

Each list needs a Reporting Schema that defines what fields are to be reflected, and what data types to use.

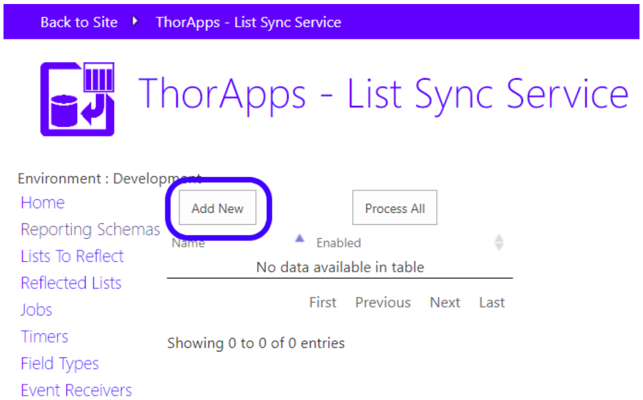
From the Site Contents page, click the "**ThorApps – List Sync Service**" icon.



Click "Reporting Schemas".

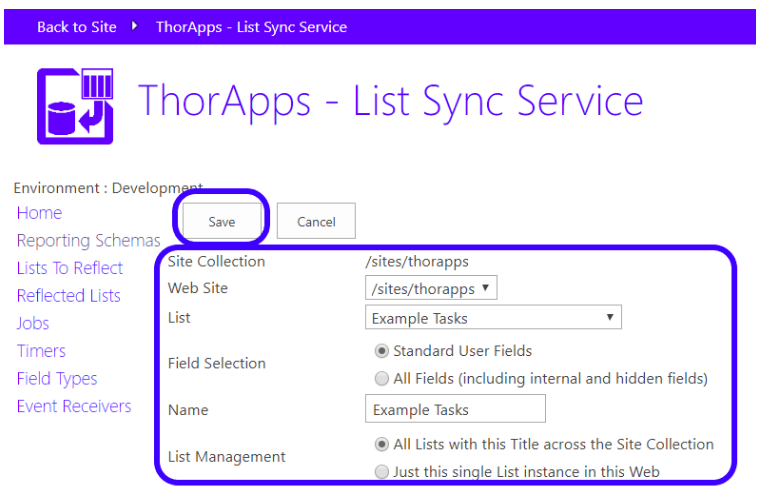


Click “**Add New**”

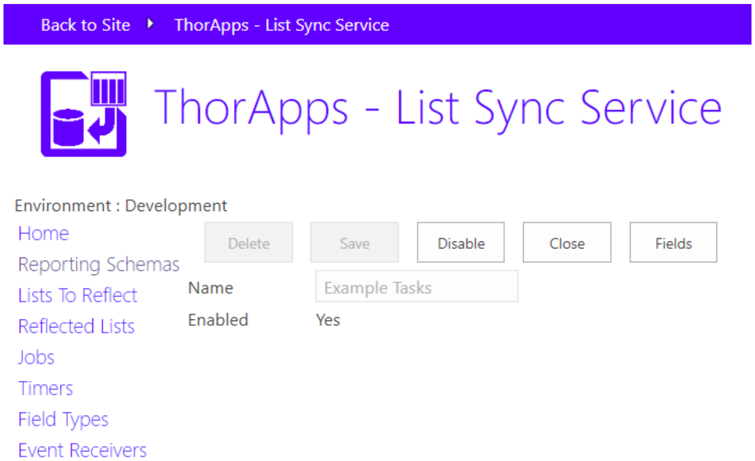


Select the web site containing the list to be reflected from the “**Web Site**” drop down menu (the root of the site collection in this instance) and the list to be reflected from the “**List**” drop down menu.

Give the Reporting Schema a name and click “**Save**”.



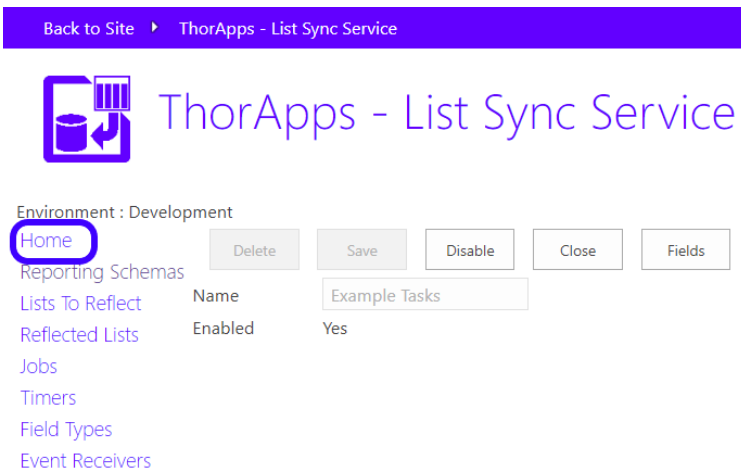
This process has created a table called Example Tasks in an Azure SQL database, mapped the "**Example Tasks**" list to it and processed all items from the list into the table. Any edits to this list will now be reflected to your database in real-time.



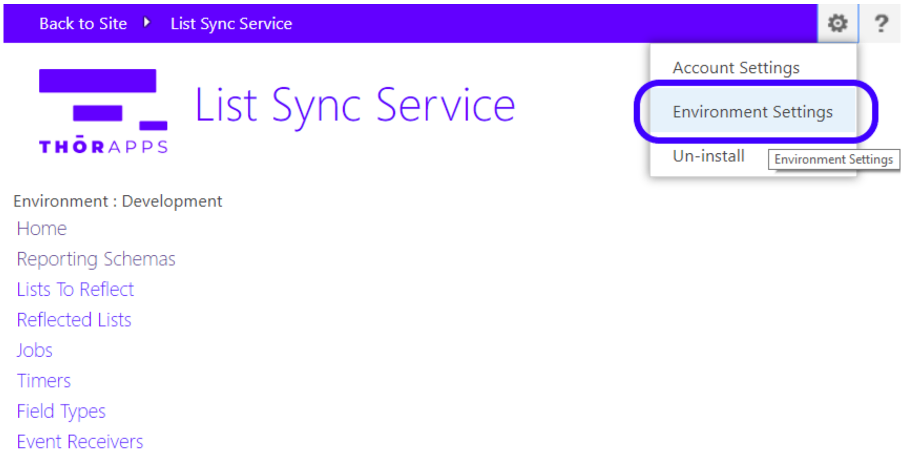
So how do you see this?

REFLECT SHAREPOINT LISTS IN A SHAREPOINT ENVIRONMENT

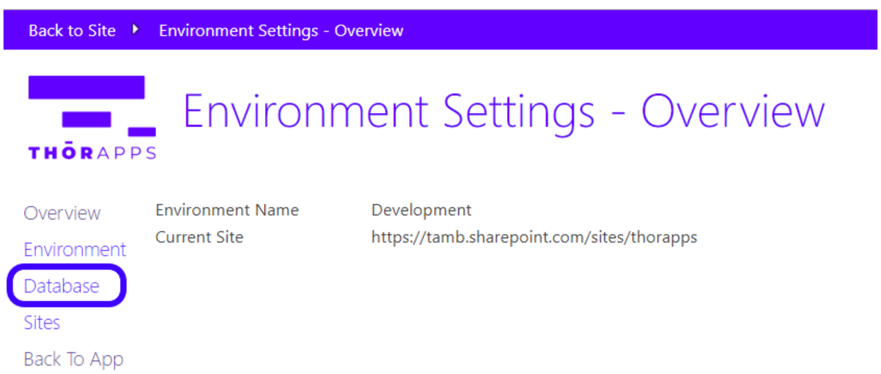
In the menu on the left, click "**Home**"



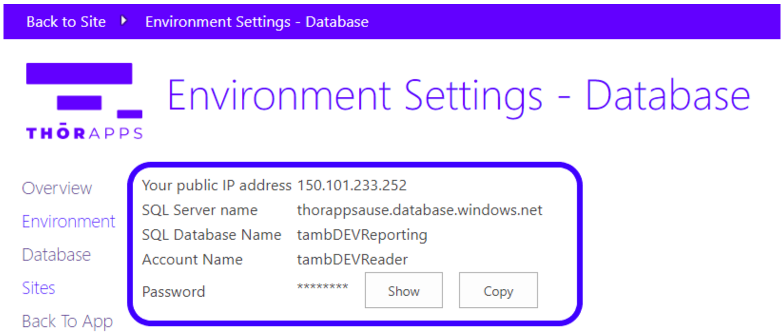
Click on the cog icon in the upper right corner and select “**Environment Settings**”.



Click on “**Database**” in the left navigation menu.



This is the SQL server name, database name, username and password you can use to connect to your data.



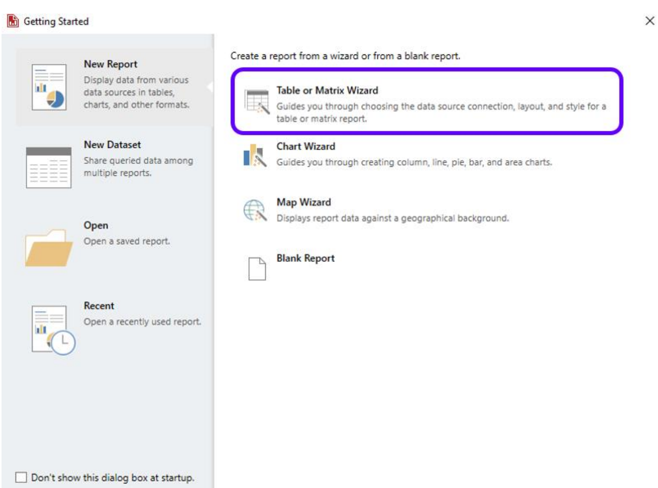
CREATING SSRS REPORTS FROM YOUR LIST USING REPORT BUILDER

Click here to download and install Microsoft's "**Report Builder**" following the Microsoft installation instructions.

Once installed, open Report Builder and click "**File**".

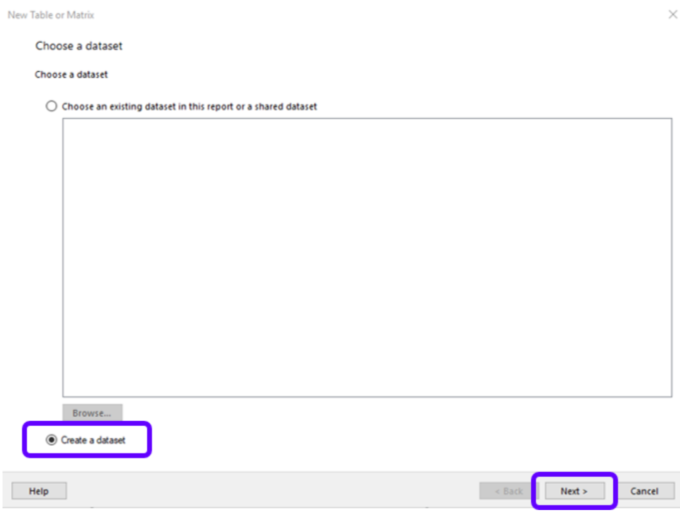
Click "**New**".

Click "**Table or Matrix Wizard**".

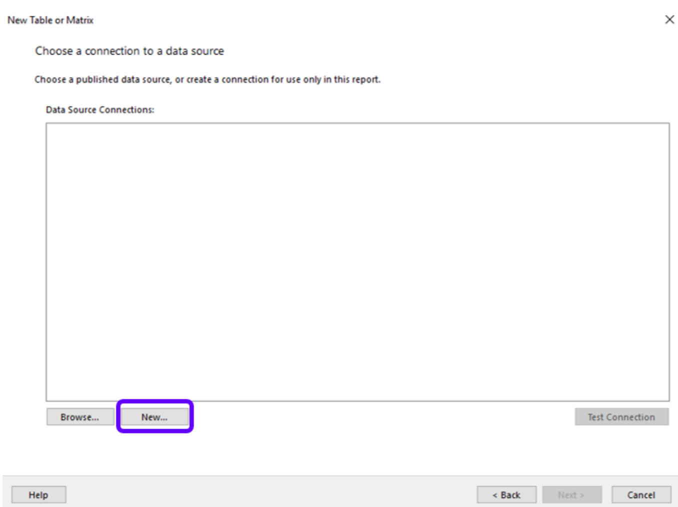


Check “**Create a dataset**”.

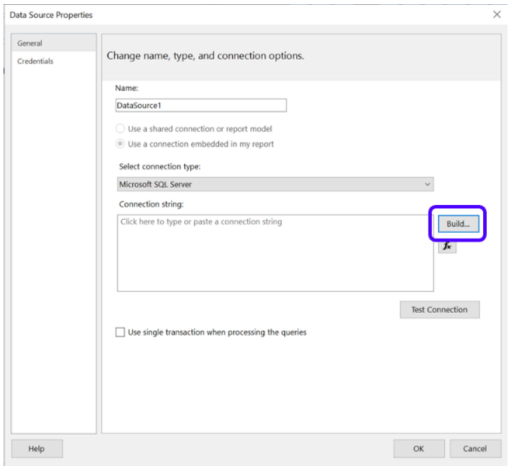
Click “**Next**”.



Click “**New**”.

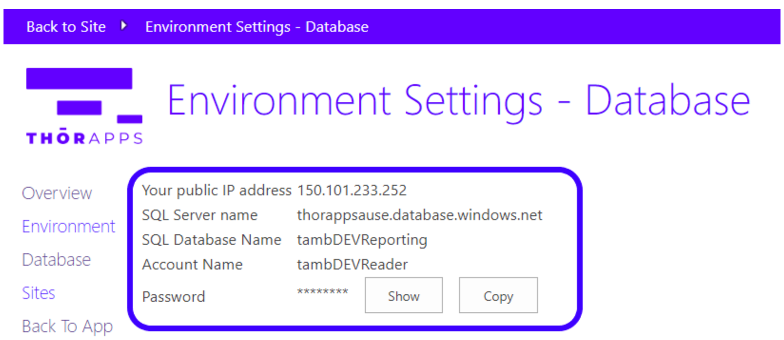


Click “**Build**”.



Navigate back to your Site Collection and open **ListSync**.

Click **Settings** (Cog on the upper right corner) and open your **Environment Settings**.



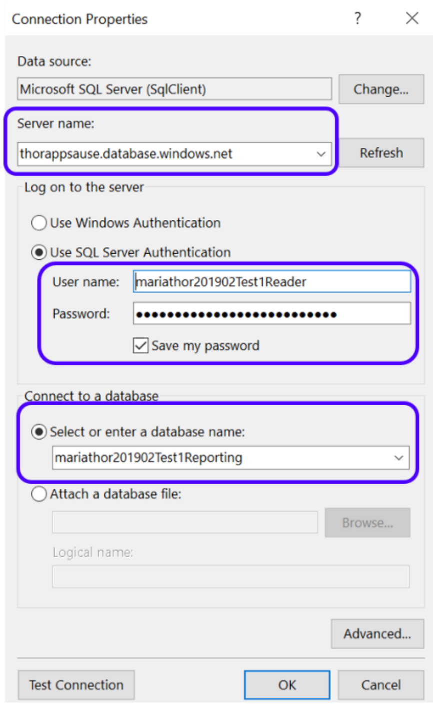
Copy and paste your **Server name** on Report Builder.

Switch the server information to "**Use SQL Server Authentication**".

Copy and paste **User name** and **Password**.

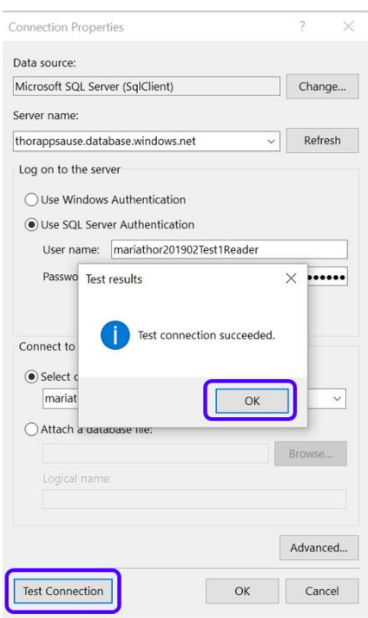
Tick the option **Save my password**.

Copy and paste **Database Name**.



Click “**Test Connection**”.

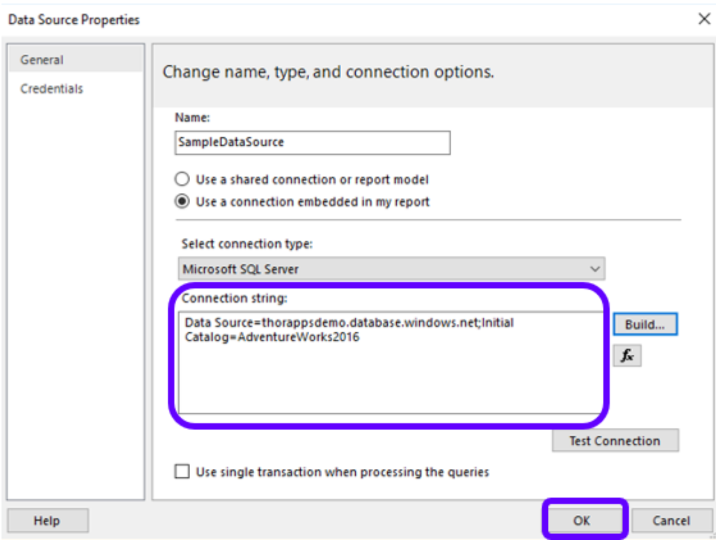
Click “**OK**” for the success message.



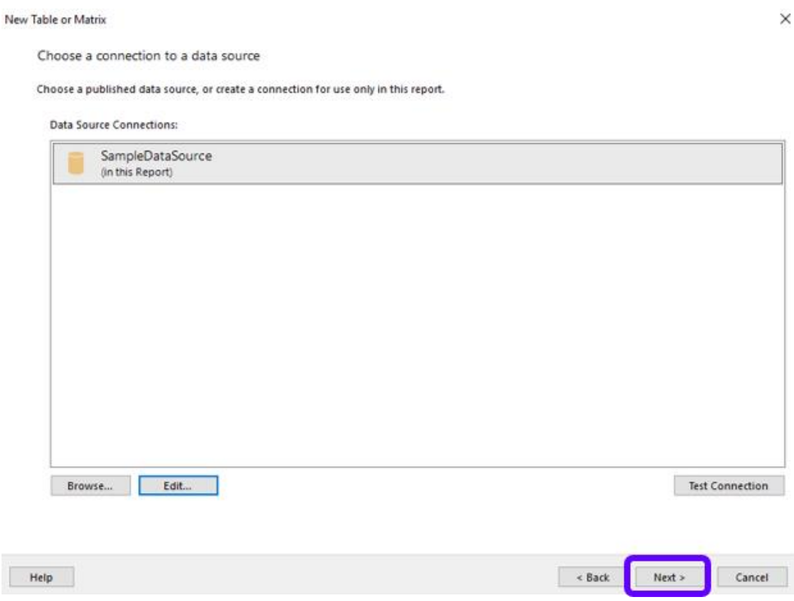
This will have generated the connection string.

Click “**OK**”.

Click “**Next**”.



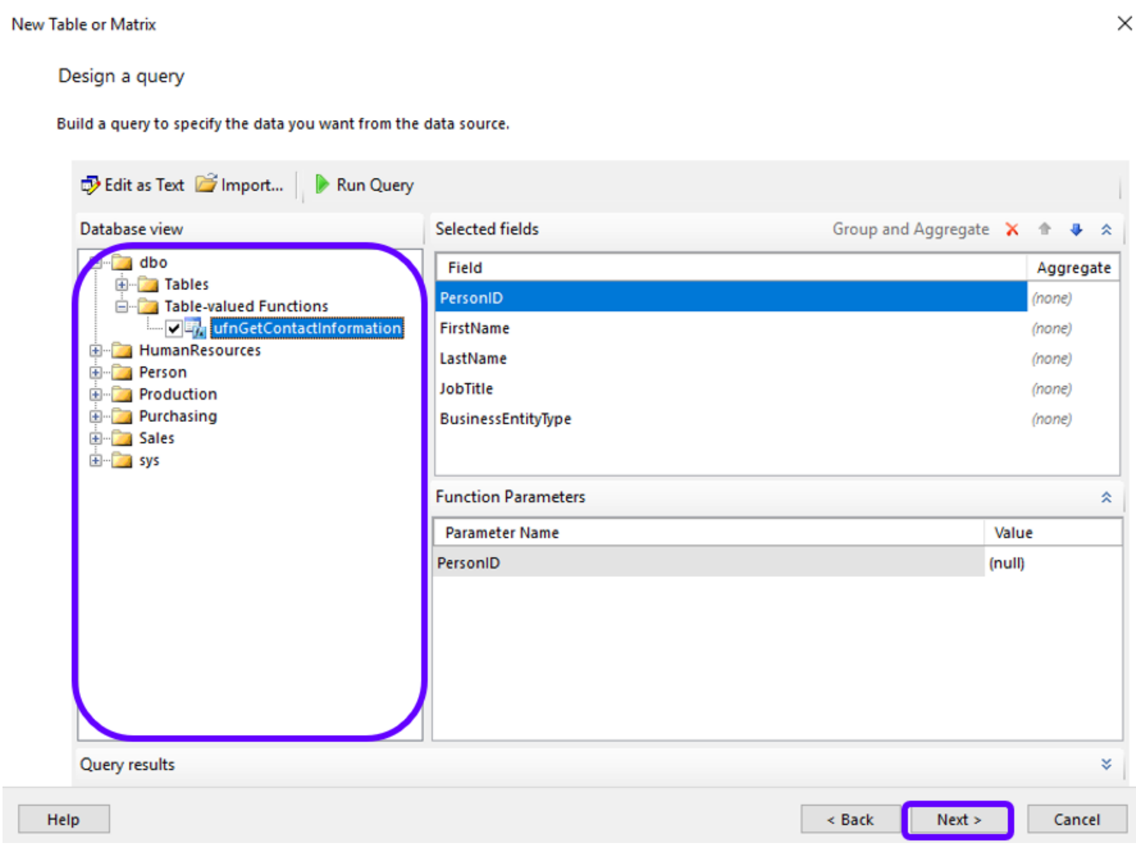
Click “**Next**”.



In the “**Database view**” pane on the left, navigate to the table containing the desired data.

Expand the table node and select the columns you want.

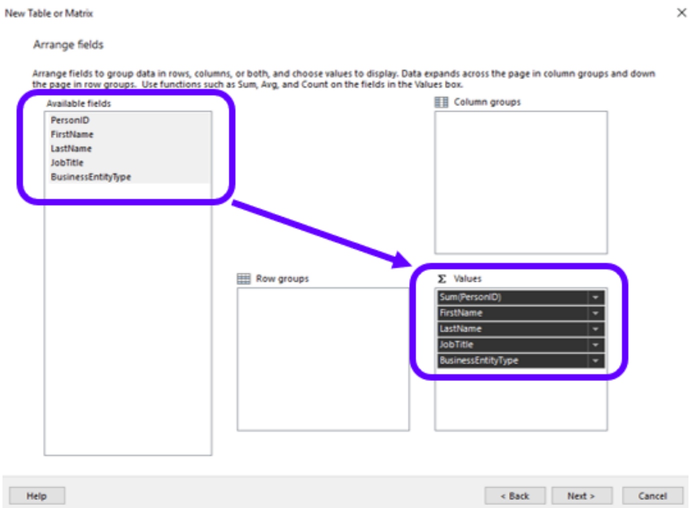
Click “**Next**”.


New Table or Matrix
Design a query
Build a query to specify the data you want from the data source.
Edit as Text
Import...
Run Query
Database view
dbo
Tables
Table-valued Functions
ufnGetContactInformation
HumanResources
Person
Production
Purchasing
Sales
sys
Selected fields
Group and Aggregate
Field
Aggregate
PersonID
FirstName
LastName
JobTitle
BusinessEntityType
(none)
Function Parameters
Parameter Name
Value
PersonID
(null)
Query results
Help
< Back
Next >
Cancel

Select all the desired fields.

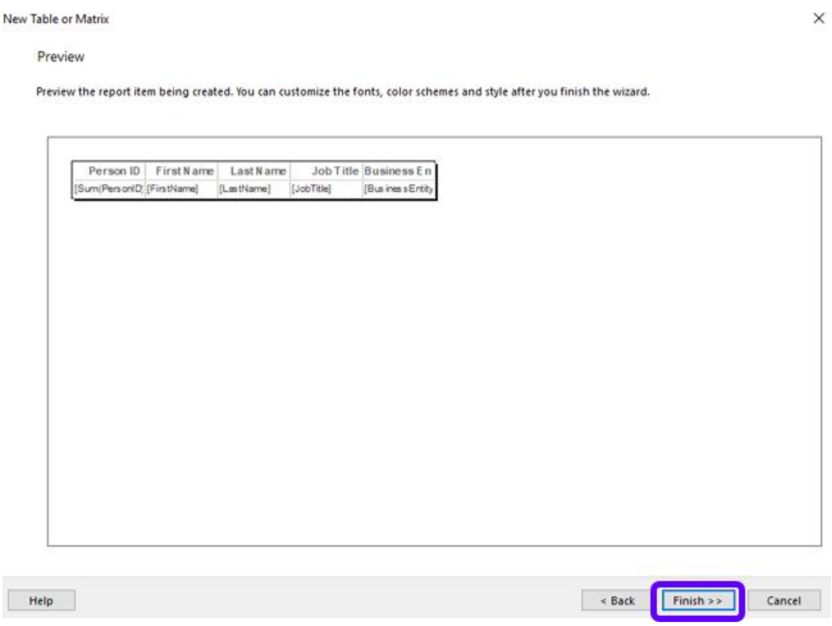
Drag and Drop them into the **Values** box.

Click “**Next**”.

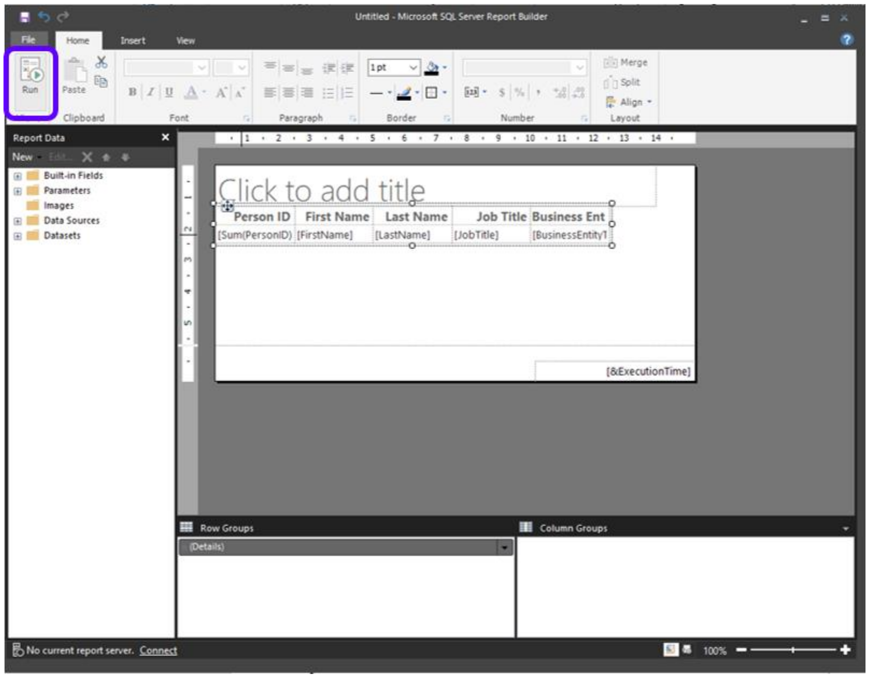


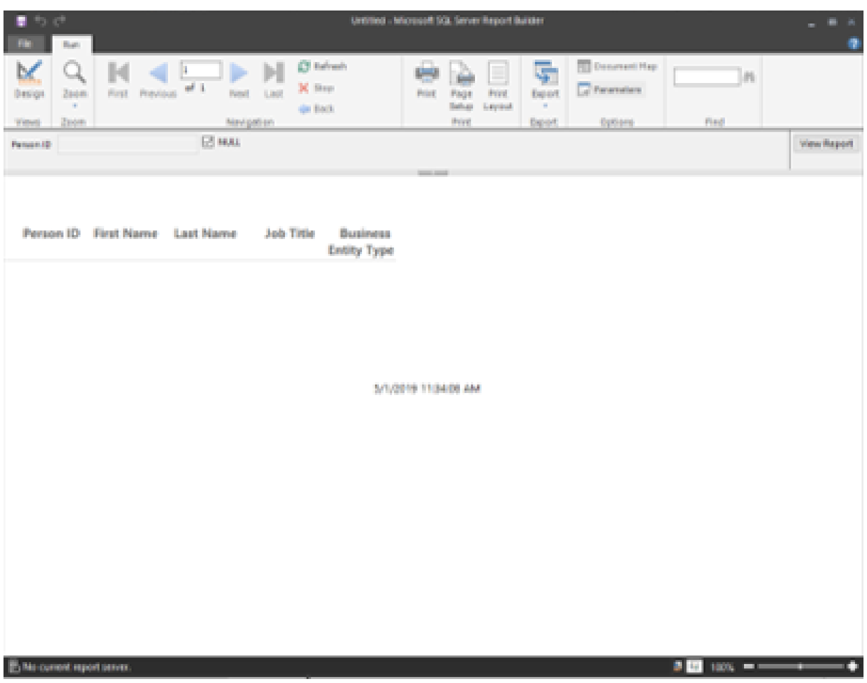
Click “**Next**”.

Click “**Finish**”.



Click “**Run**” to test the report.

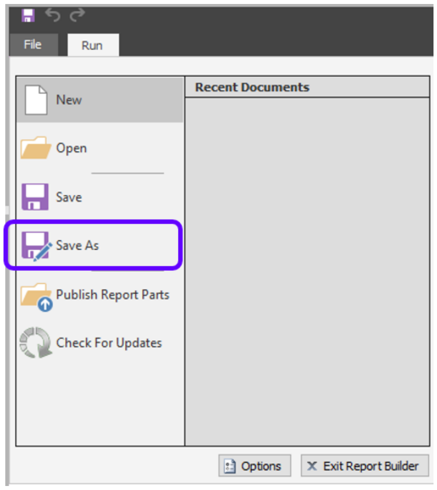




Click “**Design**” to return to the design page.

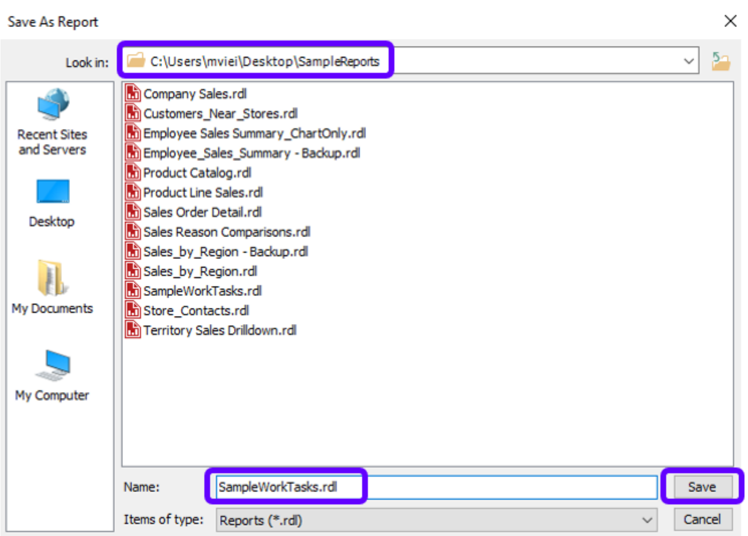
Click “**File**”.

Click “**Save As**”.



Give it a name and save it as an .rdl to a convenient location.

Click “Save”.



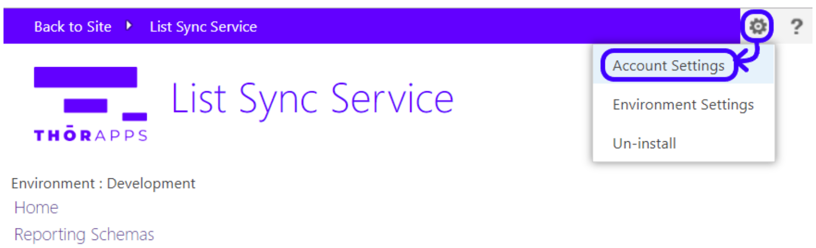
IMPORTANT: To publish your SSRS Report in SharePoint Online, install our BI Service App and follow the correspondent User Guide instructions.

SO, WHAT'S NEXT?

Purchasing

Like what you've seen? If you'd like to keep using ThorApps – List Sync Service, you'll need to setup your subscription and payment.

You can configure these through the account settings page, which is accessed from the cog icon in the upper right.



Click here to download the **Purchasing Guide**.

ANY QUESTIONS?

Contact our team of specialists at info@thorapps.com.