

# USER GUIDE

## LIST SYNC SERVICE

## 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

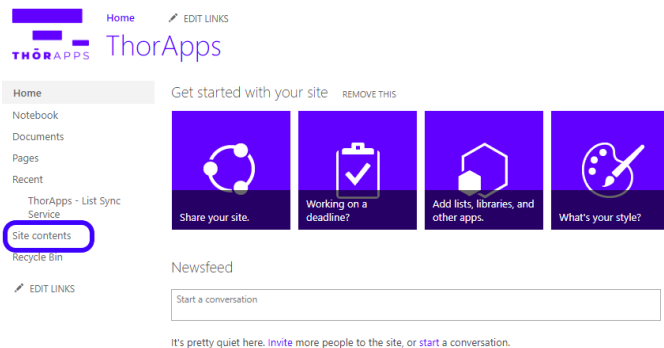
To follow this guide, you will need the following items:

- 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

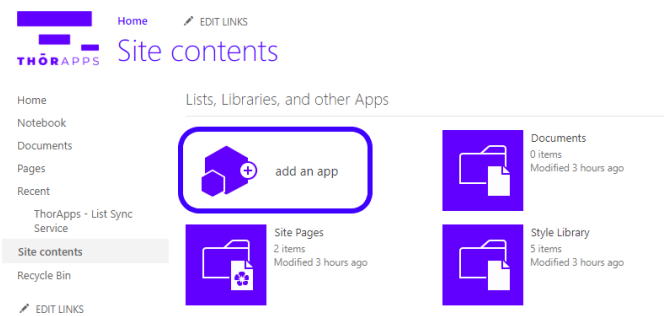
## CREATE A SHAREPOINT LIST FOR REPORTING

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

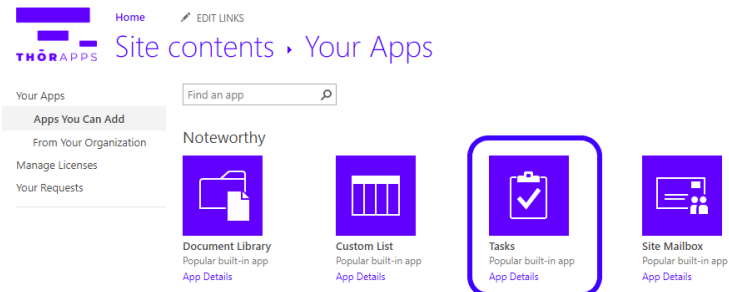
In the Quick Launch menu on the left, click **“Site Contents”**.



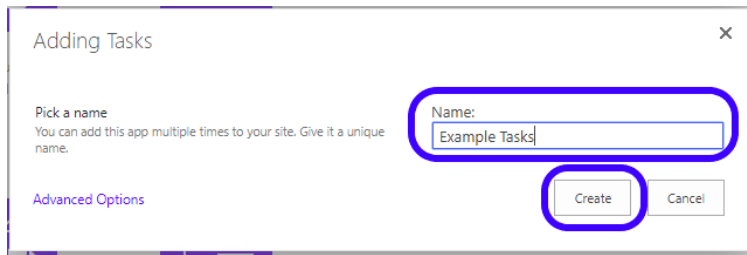
Click **“add an app”**.



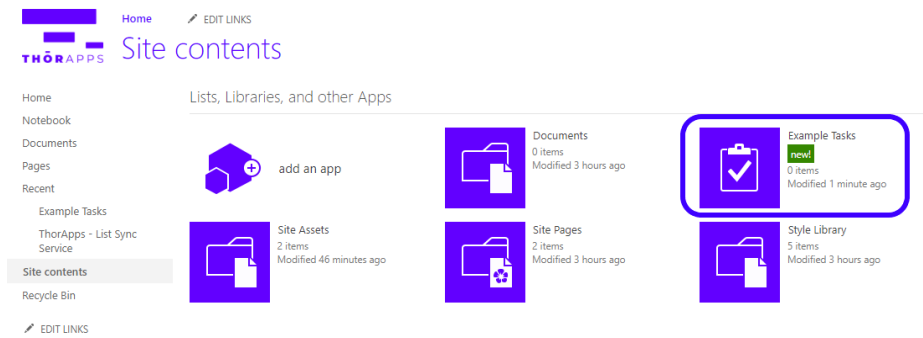
Create a new list and give it a name. Any list will do, we've used a **“Tasks”** list and called it **“Example Tasks”**.



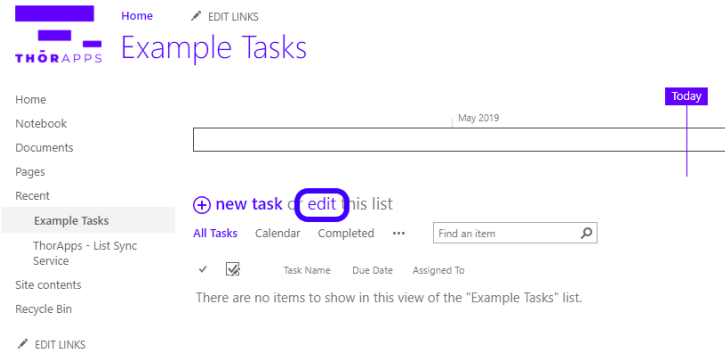
Once you have given it a name, click **“Create”**.



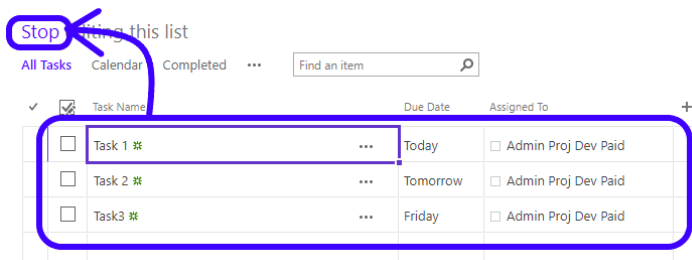
Once the list is created, click on it.



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.

new task or edit this list

All Tasks Calendar Completed ... Find an item

| ✓ |                          | Task Name | Due Date     | Assigned To                                  |
|---|--------------------------|-----------|--------------|--|
|   | <input type="checkbox"/> | Task 1    | ... Today    | <input type="checkbox"/> Admin Proj Dev Paid |
|   | <input type="checkbox"/> | Task 2    | ... Tomorrow | <input type="checkbox"/> Admin Proj Dev Paid |
|   | <input type="checkbox"/> | Task3     | ... Friday   | <input type="checkbox"/> Admin Proj Dev Paid |

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

Home EDIT LINKS

## Example Tasks

Home  
Notebook  
Documents  
Pages  
Recent

Example Tasks

ThorApps - List Sync Service

**Site contents**

Recycle Bin

EDIT LINKS

new task or edit this list

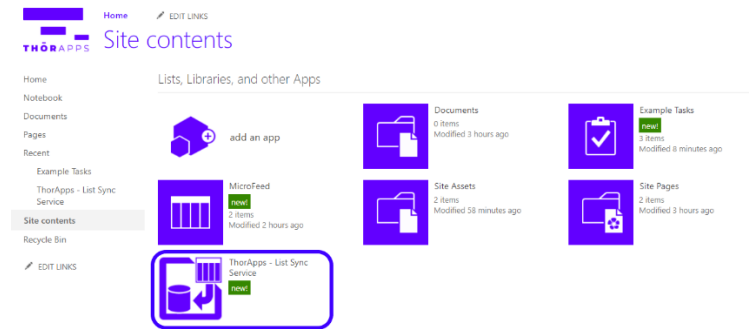
All Tasks Calendar Completed ... Find an item

| ✓ |                          | Task Name | Due Date     | Assigned To                                  |
|---|--------------------------|-----------|--------------|--|
|   | <input type="checkbox"/> | Task 1    | ... Today    | <input type="checkbox"/> Admin Proj Dev Paid |
|   | <input type="checkbox"/> | Task 2    | ... Tomorrow | <input type="checkbox"/> Admin Proj Dev Paid |
|   | <input type="checkbox"/> | Task3     | ... Friday   | <input type="checkbox"/> Admin Proj Dev Paid |

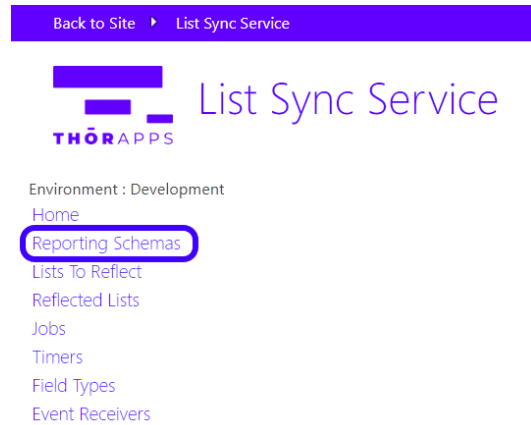
## ADDING LISTS USING REPORTING SCHEMAS

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

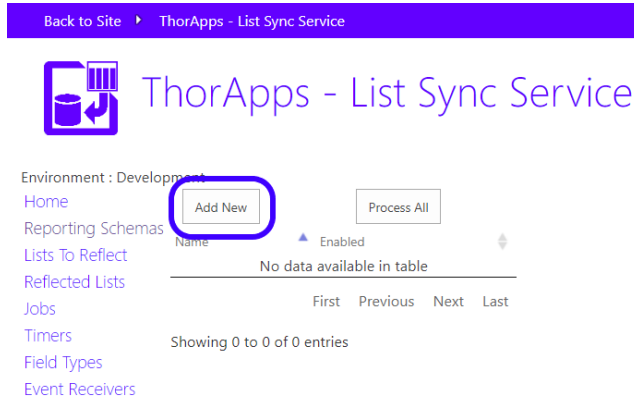
From the Site Contents page, click the “ThorApps – List Sync Service” icon.



Click “Reporting Schemas”.



## Click “Add New”



Back to Site > ThorApps - List Sync Service

### ThorApps - List Sync Service

Environment : Development  
Home  
Reporting Schemas  
Lists To Reflect  
Reflected Lists  
Jobs  
Timers  
Field Types  
Event Receivers

**Add New** Process All

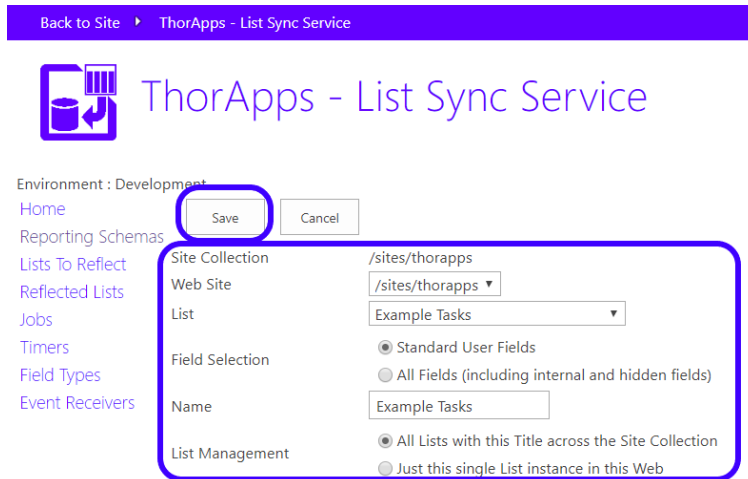
| Name                       | Enabled |
|----------------------------|---------|
| No data available in table |         |

First Previous Next Last

Showing 0 to 0 of 0 entries

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**”.



Back to Site > ThorApps - List Sync Service

### ThorApps - List Sync Service

Environment : Development  
Home  
Reporting Schemas  
Lists To Reflect  
Reflected Lists  
Jobs  
Timers  
Field Types  
Event Receivers

**Save** Cancel

Site Collection: /sites/thorapps  
Web Site: /sites/thorapps  
List: Example Tasks  
Field Selection:  
 Standard User Fields  
 All Fields (including internal and hidden fields)  
Name: Example Tasks  
List Management:  
 All Lists with this Title across the Site Collection  
 Just this single List instance in this Web



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.

[Back to Site](#) > [ThorApps - List Sync Service](#)



## ThorApps - List Sync Service

Environment : Development

[Home](#)

Reporting Schemas

[Lists To Reflect](#)

Name

[Reflected Lists](#)

Enabled  Yes

[Jobs](#)

[Timers](#)

[Field Types](#)

[Event Receivers](#)

So how do you see this?

## REFLECT SHAREPOINT LISTS IN A SHAREPOINT ENVIRONMENT

In the menu on the left, click “**Home**”

[Back to Site](#) > [ThorApps - List Sync Service](#)



## ThorApps - List Sync Service

Environment : Development

**[Home](#)**

Reporting Schemas

[Lists To Reflect](#)

Name

[Reflected Lists](#)

Enabled  Yes

[Jobs](#)

[Timers](#)

[Field Types](#)

[Event Receivers](#)

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

Back to Site > List Sync Service

THORAPPS List Sync Service

Account Settings  
Environment Settings  
Un-install Environment Settings

Environment : Development  
Home  
Reporting Schemas  
Lists To Reflect  
Reflected Lists  
Jobs  
Timers  
Field Types  
Event Receivers

Click on “Database” in the left navigation menu.

Back to Site > Environment Settings - Overview

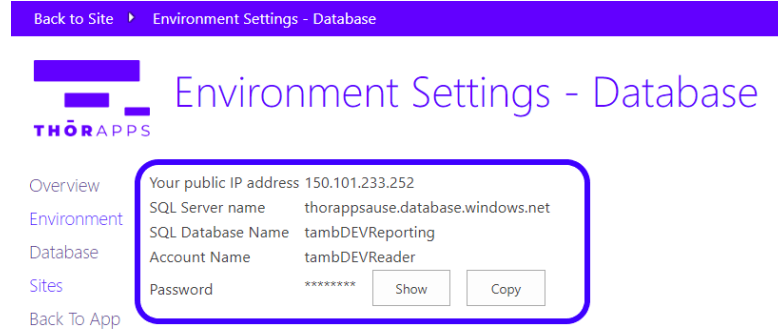
THORAPPS Environment Settings - Overview

Overview Environment Name Development  
Environment Current Site https://tamb.sharepoint.com/sites/thorapps

Overview  
Environment  
Database  
Sites  
Back To App

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

Back to Site ▶ Environment Settings - Database



Environment Settings - Database

Overview

Environment

Database

Sites

Back To App

Your public IP address 150.101.233.252

SQL Server name thorappsause.database.windows.net

SQL Database Name tambDEVReporting

Account Name tambDEVReader

Password \*\*\*\*\*

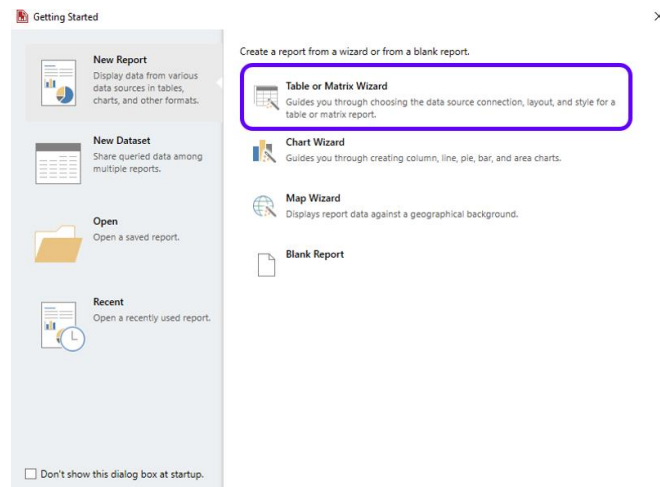
## CREATING SSRS REPORTS FROM YOUR LIST USING REPORT BUILDER

[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".



Getting Started

Create a report from a wizard or from a blank report.

**Table or Matrix Wizard**  
Guides you through choosing the data source connection, layout, and style for a table or matrix report.

**Chart Wizard**  
Guides you through creating column, line, pie, bar, and area charts.

**Map Wizard**  
Displays report data against a geographical background.

**Blank Report**

Don't show this dialog box at startup.

Check **“Create a dataset”**.

Click **“Next”**.

New Table or Matrix ×

Choose a dataset

Choose a dataset

Choose an existing dataset in this report or a shared dataset

**Create a dataset**

Click **“New”**.

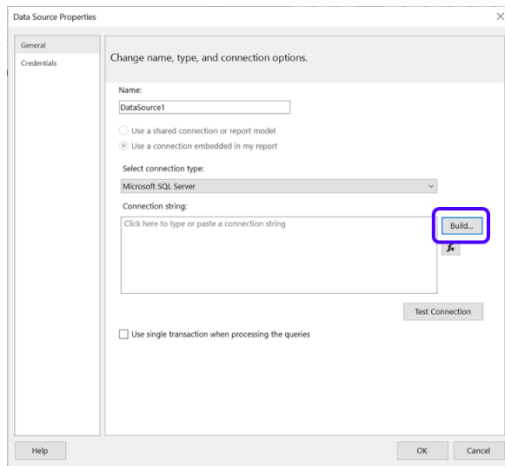
New Table or Matrix ×

Choose a connection to a data source

Choose a published data source, or create a connection for use only in this report.

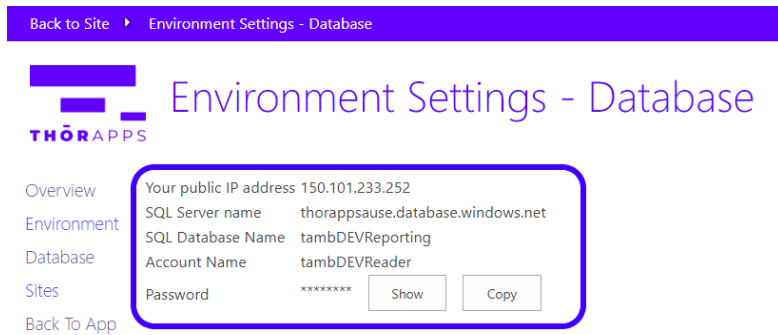
Data Source Connections:

Click **“Build”**.



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

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



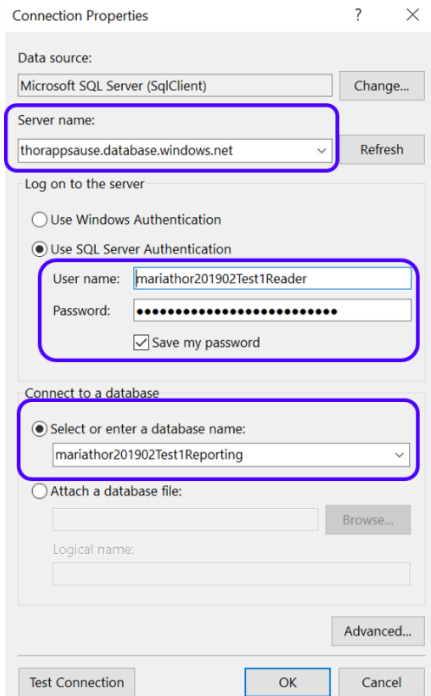
Copy and paste your **Server name** on Report Builder.

Switch the server information to **“Use SQL Server Authentication”**.

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

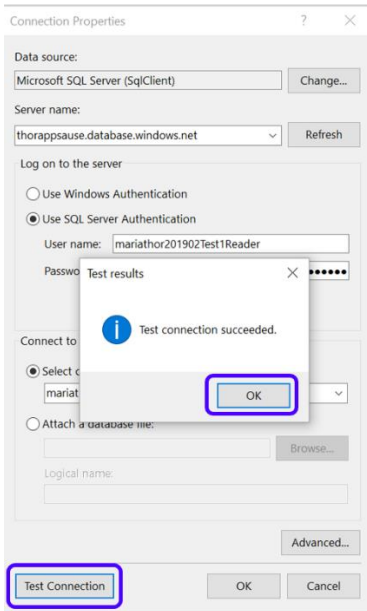
Tick the option **Save my password**.

Copy and paste **Database Name**.



Click **“Test Connection”**.

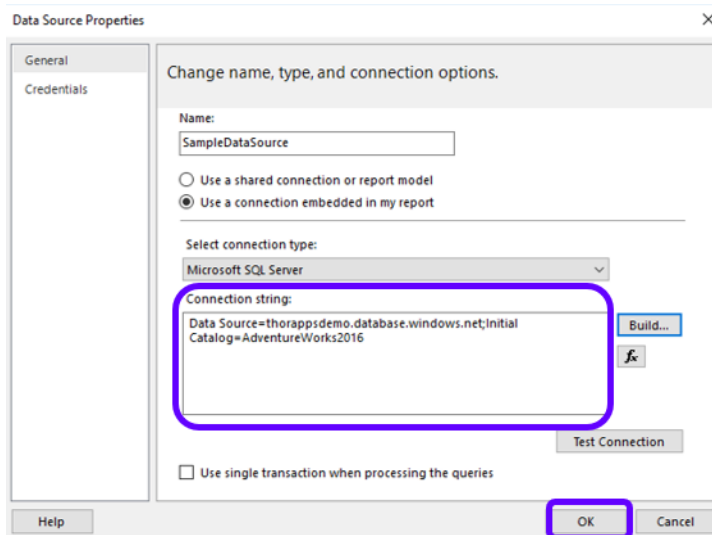
Click **“OK”** for the success message.



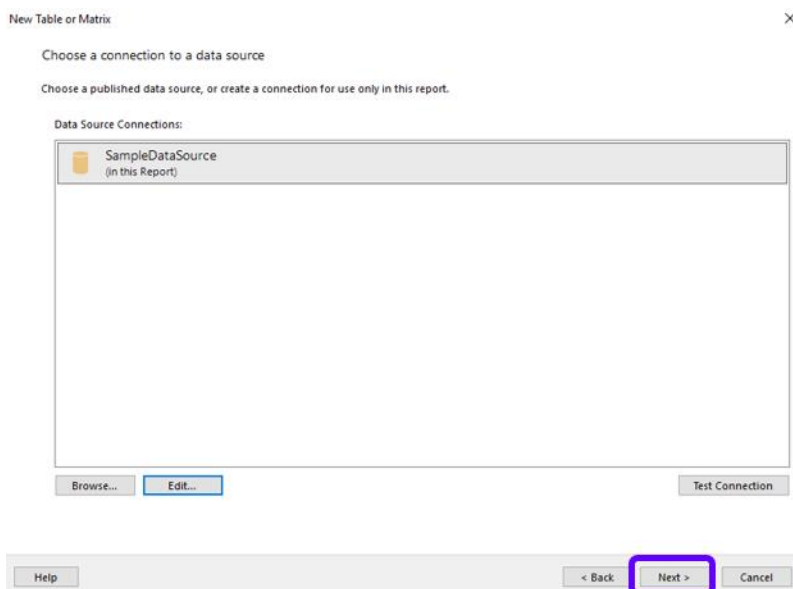
This will have generated the connection string.

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”**.

Design a query

Build a query to specify the data you want from the data source.

Database view

- dbo
  - Tables
  - Table-valued Functions
    - ufnGetContactInformation
  - HumanResources
  - Person
  - Production
  - Purchasing
  - Sales
  - sys

Selected fields

| Field              | Aggregate |
|--------------------|-----------|
| PersonID           | (none)    |
| FirstName          | (none)    |
| LastName           | (none)    |
| JobTitle           | (none)    |
| BusinessEntityType | (none)    |

Function Parameters

| Parameter Name | Value  |
|----------------|--------|
| PersonID       | (null) |

Query results

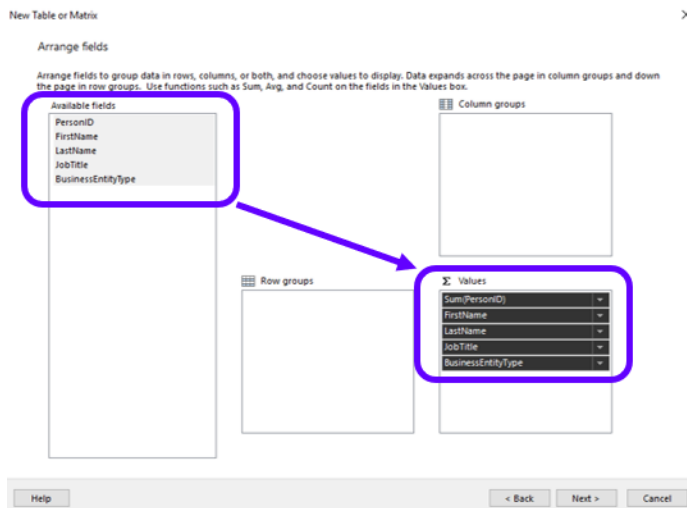
Help < Back **Next >** Cancel



Select all the desired fields.

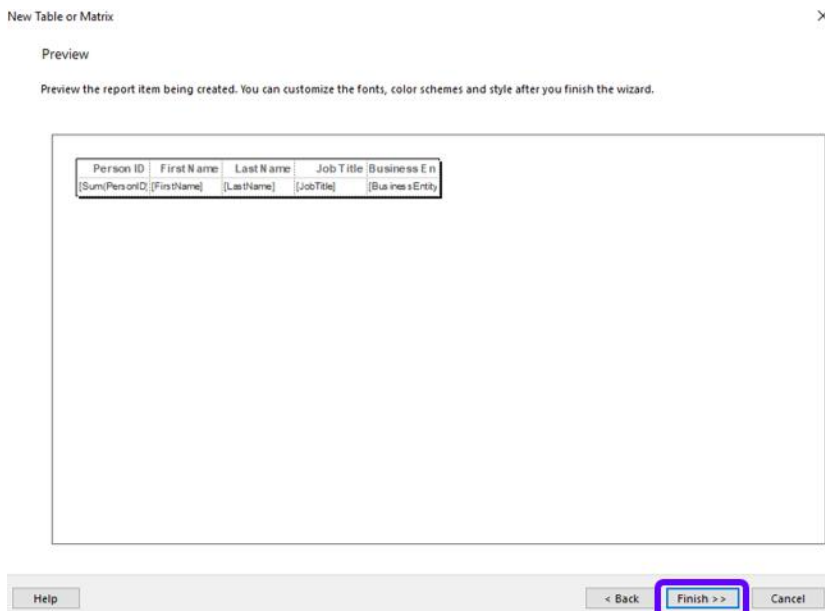
Drag and Drop them into the **Values** box.

Click **“Next”**.

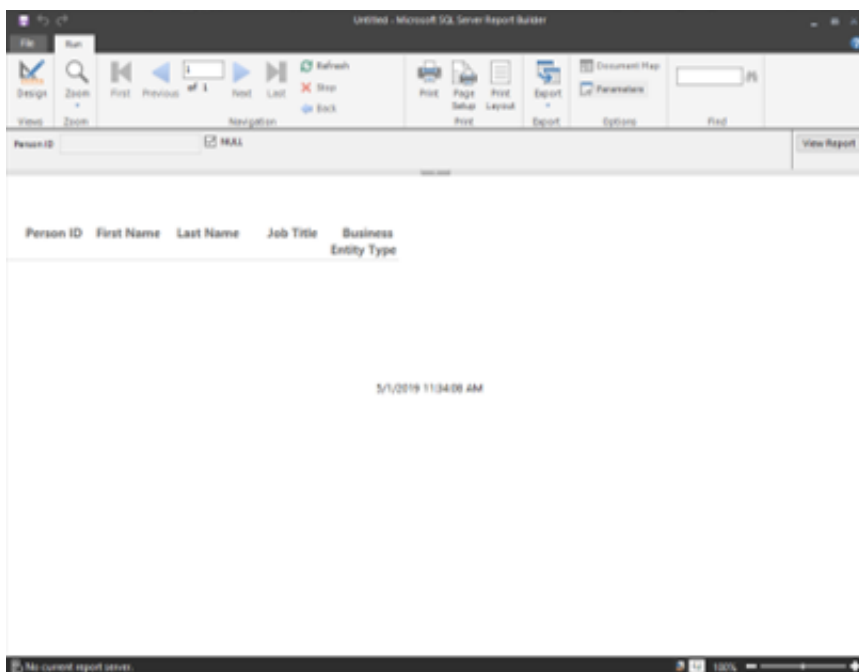
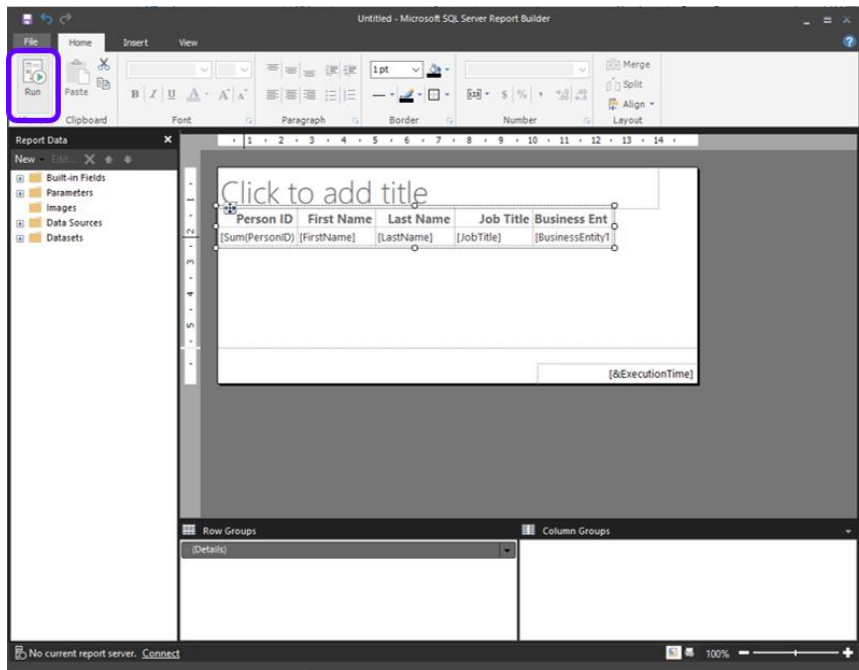


Click **“Next”**.

Click **“Finish”**.



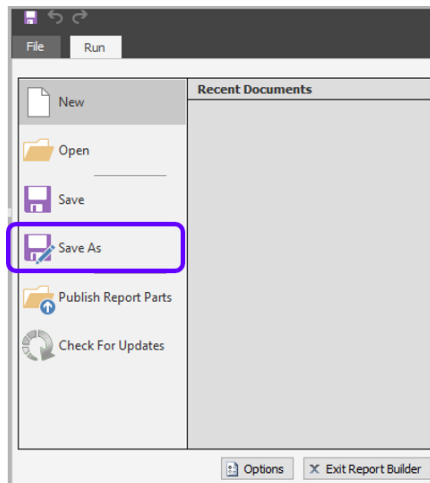
Click **“Run”** to test the report.



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

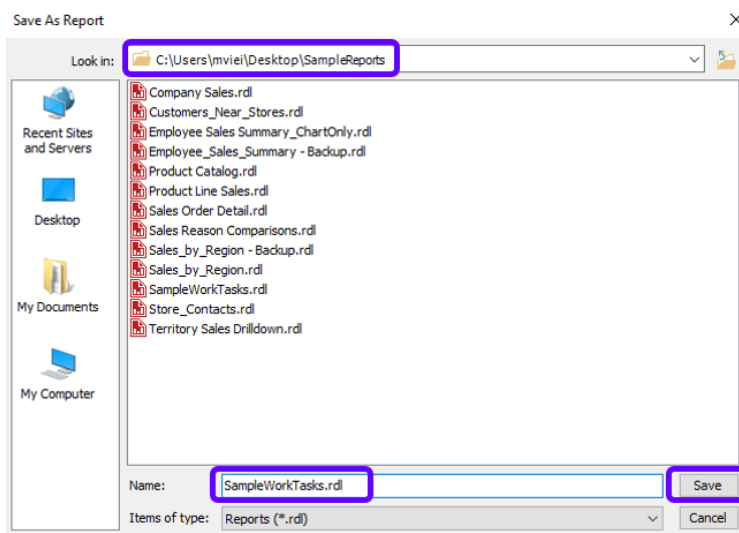
Click “File”.

Click “Save As”.



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

Click “Save”.



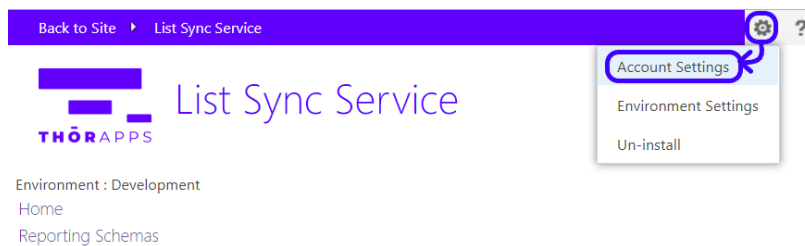
**IMPORTANT:** To publish your SSRS Report in SharePoint Online, install our [BI Service App](#) and follow the correspondent User Guide instructions.

## 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](mailto:info@thorapps.com).