Informatica® Cloud Data Integration

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Microsoft SharePoint Connector

Informatica Cloud Data Integration Microsoft SharePoint Connector
...
December 2022

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Preface

Use *Microsoft SharePoint Connector* to learn how to read from or write to Microsoft SharePoint by using Cloud Data Integration. Learn to create a connection, develop and run synchronization tasks, mappings, and mapping tasks in Cloud Data Integration.

Informatica Resources

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The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at https://www.informatica.com/services-and-training/support-services/contact-us.html.

CHAPTER 1

Introduction to Microsoft SharePoint Connector

This chapter includes the following topics:

- Microsoft SharePoint Connector Overview, 7
- Microsoft SharePoint Supported Objects and Task Operations, 8

Microsoft SharePoint Connector Overview

You can use Microsoft SharePoint Connector to connect to Microsoft SharePoint from Data Integration.

Use Microsoft SharePoint Connector to read data from or write data to Microsoft SharePoint. You can use Microsoft SharePoint objects as sources and targets in synchronization tasks, mappings, and mapping tasks.

You can switch mappings to advanced mode to include transformations and functions that enable advanced functionality.

When you run a task or mapping, the Secure Agent uses the Microsoft SharePoint API to perform the specified operation and reads data from or writes data to Microsoft SharePoint.

Microsoft SharePoint Connector supports only the default port. You cannot use any other port except the default port.

Note: Microsoft SharePoint Connector supports only Windows operating system.

Microsoft SharePoint Supported Objects and Task Operations

The following table lists the Microsoft SharePoint objects and task operations that you can include in Data Integration tasks:

Objects	Read	Write	Query	Insert	Update	Upsert	Delete	Data Preview	Lookup
List	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Document Library	Yes	Yes	Yes	Yes	NA	NA	Yes	Yes	Yes

To upsert data using a secondary key, you must map the source key field to the target secondary key field that you intend to use. If you specify the **Secondary Key for Upsert** field in the advanced target property, you must not map the target ID field in the **Field Mapping**.

To insert data using a secondary key, you must ensure that the secondary key field does not contain null values.

You must specify the ID to delete data from the list object. You must specify the ID, name, and the path to delete data from the document library object.

Note: You need to create custom objects using list or document libraries in Microsoft SharePoint application. Use Microsoft SharePoint Connector to download attachments from the custom list object in Microsoft SharePoint. The document library object supports attachments up to 10 MB.

When you download an attachment and if another file exists with the same name, the Secure Agent overwrites the existing file in the target folder. Field Length for any object should not exceed 65 characters.

CHAPTER 2

Microsoft SharePoint Connections

This chapter includes the following topics:

- Microsoft SharePoint Connections Overview, 9
- Microsoft SharePoint connection properties, 9

Microsoft SharePoint Connections Overview

Create a Microsoft SharePoint connection to connect to Microsoft SharePoint and read data from or write data to Microsoft SharePoint. You can use Microsoft SharePoint connections in synchronization tasks, mappings, and mapping tasks.

Microsoft SharePoint connection properties

When you create a Microsoft SharePoint connection, you must configure the connection properties.

The following table describes the Microsoft SharePoint connection properties:

Property	Description
Connection Name	Enter the Microsoft SharePoint connection.
Description	Provide a relevant description for the connection.
Type	Select the type of connection as Microsoft SharePoint connection.
Runtime Environment	Runtime environment that contains the Secure Agent used to access Microsoft SharePoint.
Username	Enter the Microsoft SharePoint account username.
Password	Enter the Microsoft SharePoint account password.

Property	Description
SharePoint URL	Enter the URI for the data source exposed via OData protocol layer. All requests are extensions of this URI. For example, `https://infasharepoint.abcd.com/ Site/ _vti_bin/Data.svc`
UTC Offset	Select the UTC time offset to be appended with datetime field. The default value is UTC. When you use the $LastRuntime variable in a data filter, use the time zone to offset the $LastRuntime variable.
Attachment File Path	Optional. Specify the folder path where you want to download and attach the file to Microsoft SharePoint.
Batch Size	Defines the number of rows to be fetched from Microsoft SharePoint server.
Enable Logging	Select the checkbox to enable logging.

CHAPTER 3

Synchronization Tasks with Microsoft SharePoint Connector

This chapter includes the following topics:

- Microsoft SharePoint Sources in Synchronization Task , 11
- Microsoft SharePoint Targets in Synchronization Task , 12
- Data Filters, 12
- Synchronization Task Example, 13

Microsoft SharePoint Sources in Synchronization Task

You can configure the Microsoft SharePoint source properties on the **Source** page of the Synchronization Task wizard.
The following table describes the Microsoft SharePoint source properties:

Property	Description
Connection	Name of the Microsoft SharePoint source connection.
Source Type	Type of the Microsoft SharePoint source object available.
Source Object	Name of the source object.
Display technical names instead of labels	Displays technical names instead of business names.
Display source fields in alphabetical order	Displays source fields in alphabetical order. By default, fields appear in the order returned by the source system.

Microsoft SharePoint Targets in Synchronization Task

You can configure the Microsoft SharePoint target properties on the **Target** page of the Synchronization Task wizard.
The following table describes the Microsoft SharePoint target properties:

Property	Description
Connection	Name of the Microsoft SharePoint target connection.
Target Type	Type of the Microsoft SharePoint target object available.
Target Object	Name of the target object.
Display source fields in alphabetical order	Displays target fields in alphabetical order. By default, fields appear in the order returned by the target system.

The following table describes the Microsoft SharePoint advanced target properties:

Property	Description
Secondary Key for Upsert	Specify the name of the secondary key field. You must enter the same name of the **Secondary Key for Upsert** field that you specified in the Microsoft SharePoint application.
Success File Directory	This attribute is not applicable for Microsoft SharePoint Connector.
Error File Directory	This attribute is not applicable for Microsoft SharePoint Connector.

Data Filters

You can create simple data filters. You can also create a set of data filters for each object included in a synchronization task.

The following table provides information on the various available filters:

Objects	Filters	Operators	Allowed Values
List, Document Libraries	ContentTypeID	Equals,NotEquals, Startswith	Any String
	Title		
	Modified	Equals, NotEquals, LessThan,LessThanEquals, GreaterThan, GreaterThanEquals	Any DateTime
	Created		Any DateTime
	CreatedById		Any Integer

Objects	Filters	Operators	Allowed Values
	ModifiedById		Any Integer
	ContentType	Equals, Not Equals	Any String
	Version	Equals, NotEquals, LessThan,LessThanEquals, GreaterThan, GreaterThanEquals	Any Integer
	Path	Equals,NotEquals, Startswith	Any String
	ID	Equals, NotEquals, LessThan,LessThanEquals, GreaterThan, GreaterThanEquals	Any Integer
Document Libraries	IsCurrentVersion	Equals	0/1
	Name	Equals,NotEquals, Startswith	Any String

Note:

- You can create custom fields or columns in the Microsoft SharePoint application and assign it in a synchronization task.
- In boolean data type, zero is considered as false. One and others values are considered as true.
- The above mentioned fields are the default filter fields or columns for Microsoft SharePoint list and document libraries.
- You can use $LastRunTime and $LastRunDate variables in a data filter.

Synchronization Task Example

You can create a synchronization task to read data from a Microsoft SharePoint source and write data to the Microsoft SharePoint target.

- You need to create a Microsoft SharePoint connection before you configure the synchronization task.
- You can upload attachments to the doc library only when you are using the Sharepoint 2013 version.
- When you upgrade from Sharepoint 2013 and run an existing mapping, you need to refresh the existing mapping and the fields for the task to run successfully.
- Ensure that the Microsoft Sharepoint document library path from where you want to read or write data does not contain special characters. When you import the objects, the data preview fails to display the objects.

1. In Data Integration, click **New** > **Tasks**.
2. Select **Synchronization Task**, and click **Create**.

   The **Definition** tab appears.

3. Configure the following fields on the **Definition** tab:

Field	Description
Task Name	Name of the synchronization task.
Description	Description of the synchronization task. Maximum length is 255 characters.
Task Operation	Select the task operation that you want to perform.

4. Click **Next**.

   The **Source** tab appears.

5. Specify the source **Connection** and **Source Object** to be used for the task.
6. Click **Next**.

   The **Target** tab appears.

7. Select the target **Connection** and **Target Object** required for the task.
8. Click **Next**.

   The **Data Filters** tab appears.

9. Select the filter object, filter field, and filter operator to create a data filter on the **Data Filters** page.
10. Click **Next**.

    The **Field Mapping** tab appears.

11. Click **Automatch** on the **Field Mapping** tab to map source fields to target fields accordingly.

    When you insert data in the document library object, you must specify the Name, Body, BodyLength, and ContentType fields.

    - When you select Source connection as Salesforce or any database and Target connection as Microsoft SharePoint, in the field mapping: Edit Body function and then add DEC_BASE64 expression to map the body. You need to ensure that “BodyLength” is mapped.
    - When you select Source connection as Microsoft SharePoint and Target connection as Salesforce or any database, in the field mapping: Edit Body function and then add ENC_BASE64 expression to map the body. You need to ensure that “BodyLength” is mapped.
    - To add or edit expression in Field Mapping, click fx.

    Note:

    - If you exceed the maximum path length of 2048 characters for POST and GET requests in the **Field Mapping** tab, the following error message appears:

      ```
      Read operation failed
      ```

    - You can upload attachments to the doc library only when you are using the Sharepoint 2013 and 2016 versions.
    - When you upgrade from Sharepoint 2013 version and run an existing mapping, if the mapping fails then refresh the mappings and run the mapping again.

12. Click **Validate Mapping** to validate the mapping.
13. Click **Next**.

    The **Schedule** tab appears where you can schedule the task for each requirement and save.

14. Configure the advanced source properties on the **Schedule** tab.

15. Click **Save** > **Finish**.
16. Select the synchronization task from the **Explore** page and click **Actions** > **Run**.

    In the **Monitor**, you can monitor the status of the logs after you run the task.

CHAPTER 4

Mappings and Mapping Tasks with Microsoft SharePoint Connector

Use the Data Integration Mapping Designer to create a mapping.In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

Microsoft SharePoint Sources in Mappings

To read data from a Microsoft SharePoint source, configure a Microsoft SharePoint object as the Source transformation in a mapping.

Specify the name and description of the Microsoft SharePoint source. Configure the source properties for the source object.

The following table describes the Microsoft SharePoint source properties:

Property	Description
Connection	Microsoft SharePoint source connection.
Source Type	Type of the Microsoft SharePoint source object available.
Object	Name of the source object for the mapping.
Filter	Configure a filter to remove rows at the source.

Microsoft SharePoint Targets in Mappings

To write data from a Microsoft SharePoint target, configure a Microsoft SharePoint object as the Target transformation in a mapping.

Specify the name and description of the Microsoft SharePoint target. You can configure the target and advanced properties for the target object.

The following table describes the Microsoft SharePoint target properties:

Property	Description
Connection	Name of the Microsoft SharePoint target connection.
Target Type	Type of the Microsoft SharePoint target object available.
Object	Name of the target object.
Operation	Select the target operation.

The following table describes the Microsoft SharePoint advanced target properties:

Property	Description
Secondary Key for Upsert	Specify the name of the secondary key field. You must enter the same name of the **Secondary Key for Upsert** field that you specified in the Microsoft SharePoint application.
Success File Directory	This attribute is not applicable for Microsoft SharePoint Connector.
Error File Directory	This attribute is not applicable for Microsoft SharePoint Connector.

CHAPTER 5

Troubleshooting

This chapter includes the following topics:

- Troubleshooting Overview, 18
- Troubleshooting Synchronization Task, 18
- Increasing the secure agent memory, 19
- Read Data with HTML Tags, 20
- Modifying Field Precision, 21

Troubleshooting Overview

Use the following sections to troubleshoot errors in Microsoft SharePoint Connector.

Troubleshooting Synchronization Task

When you create a synchronization task that contains an invalid configuration, the Secure Agent displays a NULL error message. The NULL error message files are saved in a specific location. For example, `<Secure Agent installation directory>\apps\Data_Integration_Server\<latest version of connector>\ICS\main\tomcat\log`.

The session log captures the log and exception details of a failed synchronization task. You require special permission to run the application in debug mode.

If you exceed the maximum path length of 2048 characters for POST and GET requests in the field mapping, the following error message appears:

```
Read operation failed
```

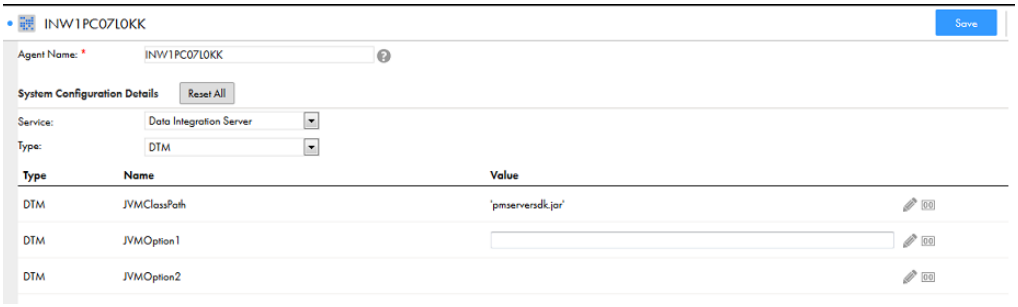
For more information about the maximum path length limitation for POST and GET requests, see https://support.microsoft.com/en-us/help/208427/maximum-url-length-is-2-083-characters-in-internet-explorer

Increasing the secure agent memory

To increase performance and avoid runtime environment memory issues, perform the following steps:

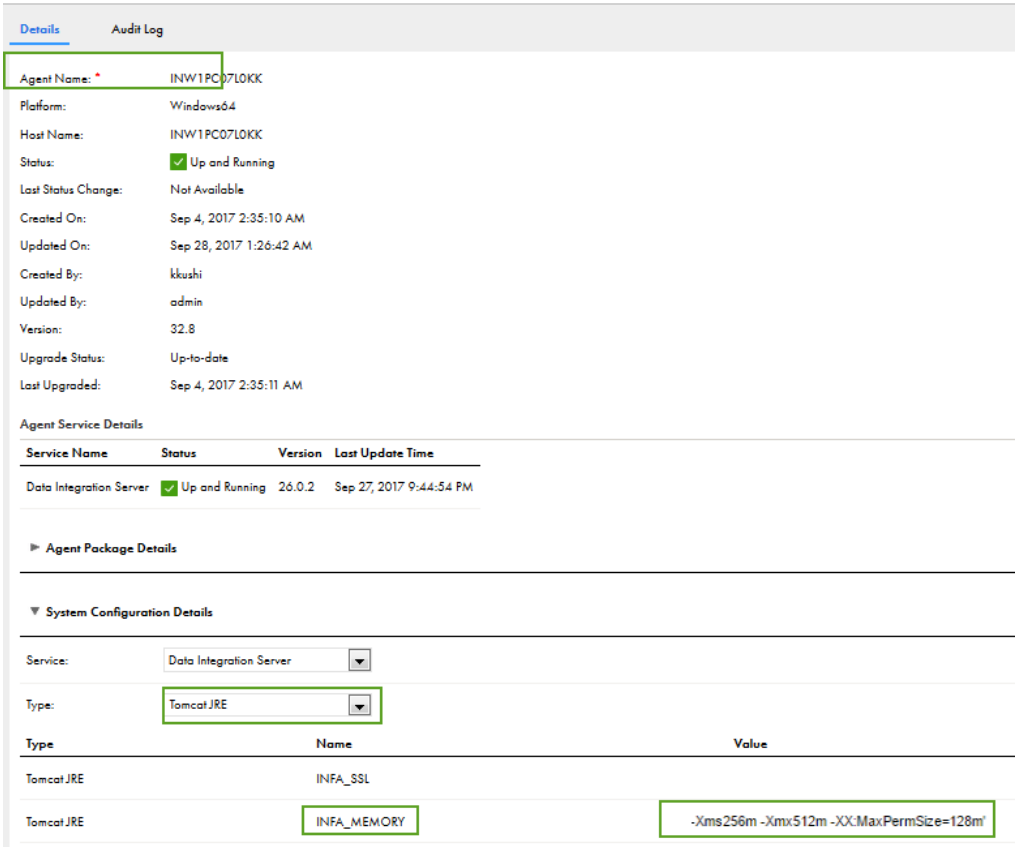
1. In Administrator, select **Runtime Environments**.
2. Select the Secure Agent for which you want to increase memory from the list of available Secure Agents.
3. In the upper-right corner, click **Edit**.
4. In the **System Configuration Details** section, select the **Type** as **DTM** for the Data Integration Service.
5. Edit **JVMOption1** as **-Xms4056m** and **JVMOption2** as **-Xmx4056m**.

   The following image shows the **Details** page:



6. In the **System Configuration Details** section, select the **Type** as **TomCatJRE**
7. Edit **INFA_memory** as **-Xms256m -Xmx512m**.

The following image shows the **Agent Details** page:



Note: The minimum and maximum values for the Java heap size are given as an example. Specify the size according to your requirements.

8. Restart the Secure Agent.

Read Data with HTML Tags

When you read data containing HTML tags from the source, the agent reads the data as plain text. If you want to read data with HTML tags, set the `preserveSPHTMLcontent` property to true in the `pmrdtm.cfg` and `tomcat.cfg` files.

To set the value of the `preserveSPHTMLcontent` property, perform the following steps:

1. In Administrator, select **Runtime Environments**.

   The **Runtime Environments** page appears.
2. Select the Secure Agent for which you want to set the `preserveSPHTMLcontent` property.
3. In the upper-right corner, click **Edit**.
4. Select the **Service** as **Data Integration Server** in the **Custom Configuration Details** section.
5. Select the **Type** as **DTM** in the **Custom Configuration Details** section.
6. Add `preserveSPHTMLcontent` in the **Name** field.

7. Set the **Value** as **true**.
8. Click the add icon to add another custom configuration property.
9. Select the **Service** as **Data Integration Server** of the newly added custom configuration property.
10. Select the **Type** as **Tomcat**.
11. Add `preserveSPHTMLcontent` in the **Name** field.
12. Set the **Value** as **true**.

    The following image shows the **Custom Configuration Details** section.

13. Click **OK**.
14. Restart the Secure Agent.

Modifying Field Precision

The Microsoft SharePoint string fields have a default field length of 255 characters. To increase the default value, you need to edit `SharePointColumns.properties` file.

Modify the `SharePointColumns.properties` file in the following locations:

- `<Secure Agent installation directory>\downloads\<latest connector zip package>\package \plugins\<plugin ID>`
- `<Secure Agent installation directory>\downloads\<latest connector zip package>\package \rdtm\javalib\<plugin ID>`

Note: It is suggested to modify connection parameters at one file location and then copy the modified file to other location. The syntax for entering the columns or fields precision in the properties file is as follows:

```
<ObjectName.Column/Field Name=Column/Field Size >
```

For example, `CTSList.SkillsetDescription=1024`

The following figure is a reference `SharePointColumns.properties` file.

```
#Object Name=LIST
[FIELDLENGTH]
CTSList.TechSkills=512
CTSList.Experience=25
CTSList.SkillsetDescription=1024
CTSList.CreatedById=300
CTSList.DescAboutPrj=2040
#Object Name=LIBRARY
[FIELDLENGTH]
CTSDOCLibrary.Name=100
CTSDOCLibrary.Title=512
CTSDOCLibrary.ProjectDesc=1024
CTSDOCLibrary.Resources=64
CTSDOCLibrary.ProjectCost=32
```

Note: After you modify the `SharePointColumns.properties` file, you must restart the Secure Agent and then refresh the corresponding synchronization task.

CHAPTER 6

Frequently Asked Questions and Answers

This chapter includes the following topic:

- Frequently Asked Questions and Answers, 23

Frequently Asked Questions and Answers

The following section lists out the frequently asked questions and answers:

Which versions are currently supported by Microsoft SharePoint?

Answer:

Microsoft SharePoint currently supports version 2010, 2013, 2016 and 2019.

What set up should be performed on Microsoft SharePoint to work with Data Integration and Secure Agent?

Answer:

- You do not require any set up on the Microsoft Sharepoint.
- You must access Microsoft Sharepoint Odata REST URL.

Note: For relevant documentation for Microsoft Sharepoint 2013, see `http://msdn.microsoft.com/en-us/library/office/fp142380(v=office.15).aspx`

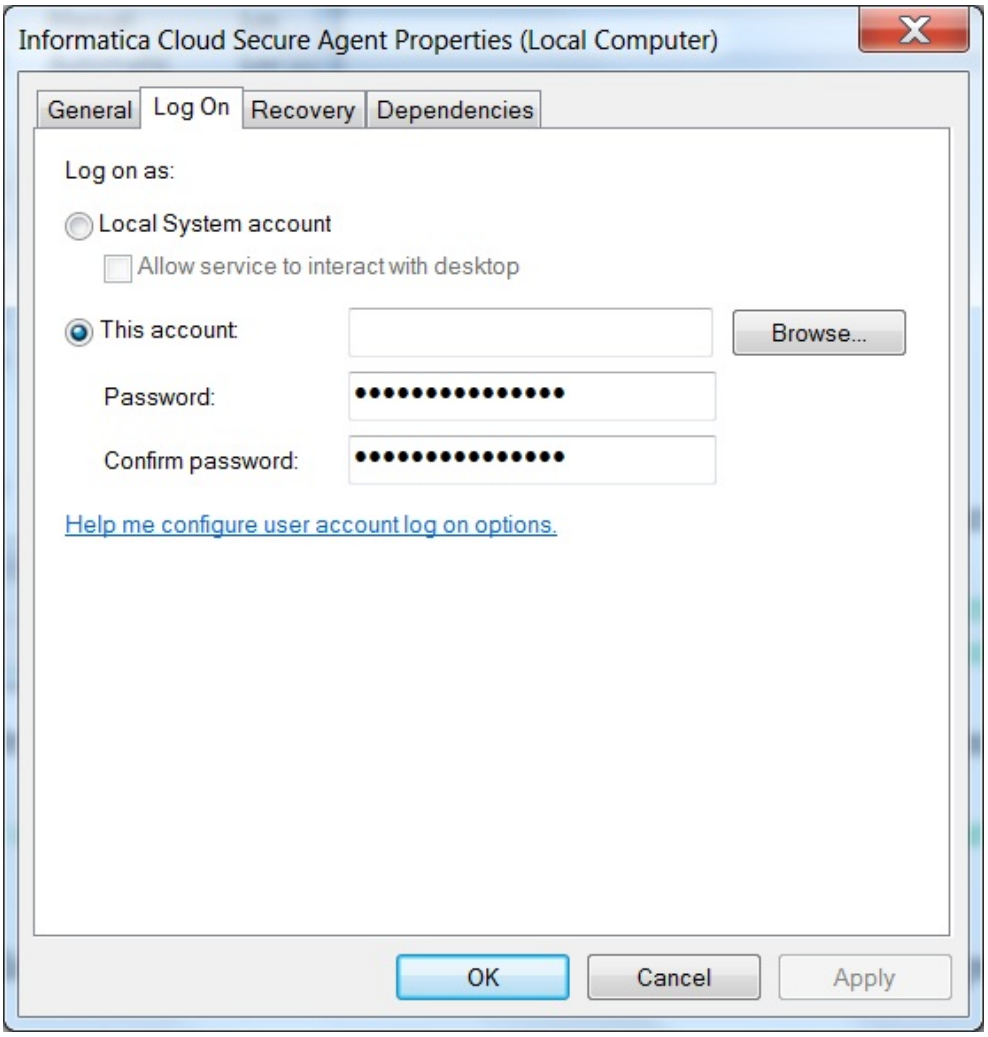
- The Odata REST URL needs to be accessible from the machine where the Secure Agent is installed.

Does Microsoft SharePoint require Windows authentication?

Answer:

- The connector uses HTTP based authentication from the connection screen by default.
- It supports Windows based authentication directly.

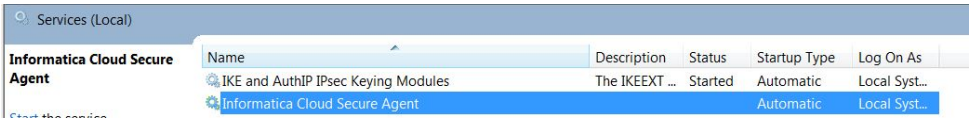
- You can start the service by using configured user account of Microsoft SharePoint Windows.



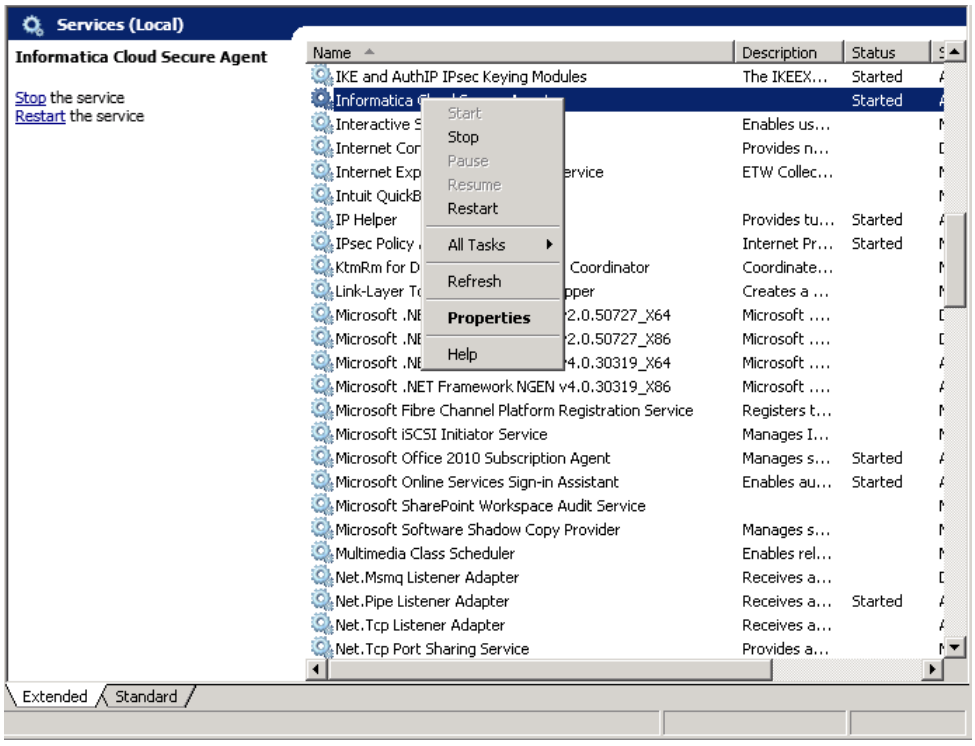
If the Microsoft SharePoint server is configured to use Windows authentication and User identity in Active Directory Domain Services (AD DS), then you must start the Secure Agent with Windows/AD user account. The same account which has relevant access to Microsoft SharePoint server.

Perform the following steps to restart the agent:

1. Select **Services** program.
2. In **Services**, search for **Informatica Cloud Secure Agent**.

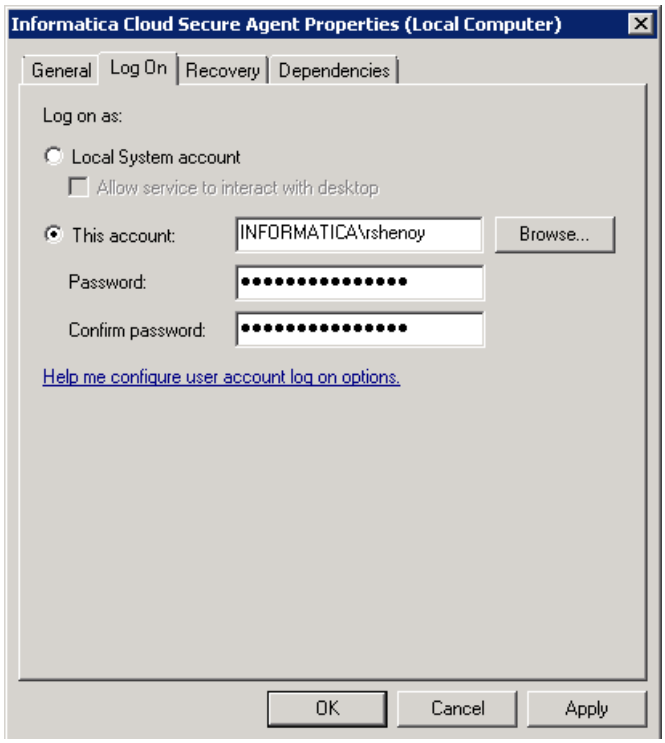


3. Right click Informatica Cloud Secure Agent and select **Properties**.



Informatica Cloud Secure Agent Properties page appears.

4. Select **Log On** tab.
5. Select **This account**.



6. Specify account name and **Password** as show in the previous figure.
7. Click **OK**.

   Note: In case of Windows authentication, the username and password entered as connection parameters, have no impact on the authentication of connection. As these parameters are mandatory, you can enter dummy values.

Which fields are supported for mapping?

Answer:

- The mapping fields are not listed as Microsoft SharePoint fields are dynamic and customizable.
- All fields such as standard or custom, exposed by the Microsoft SharePoint Odata REST URI are supported for mapping.

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