



DOCUMENTS to SharePoint Connector

Product Description

July 2015 – ReadSoft AB

© 2015 Lexmark International Technology, S.A. All rights reserved.

Lexmark is a trademark of Lexmark International, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Lexmark.

27072015.1001

Contents

Overview	4
The DOCUMENTS to SharePoint Connector	4
Key concepts and features	5
Components	6
Supported systems	6
Installation	7
RSB and adapters	7
RSB plug-in	7
Configuration	8
Create a document service	8
Configure the RSB plugin (add-on)	10
Map fields	12

Overview

This document describes the *DOCUMENTS to SharePoint Connector* for ReadSoft Service Bus.

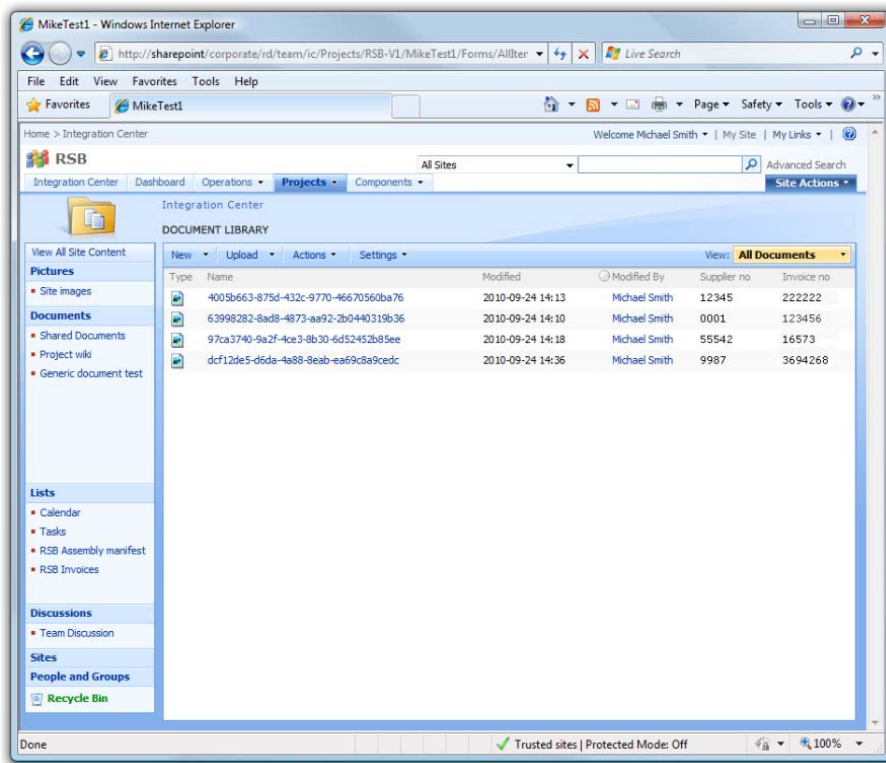
ReadSoft Service Bus is an integration platform that extends ReadSoft solutions by providing universal capabilities for integrating and customizing document-driven processes. ReadSoft Service Bus (RSB) adds high customer value to ReadSoft solutions and reduces solution implementation times for custom projects. It is service-orientated, expandable, facilitates easy integration and allows component reuse across multiple systems.



RSB uses *connectors* to facilitate communication between systems.

The **DOCUMENTS to SharePoint Connector**

The **DOCUMENTS to SharePoint Connector** facilitates communication between ReadSoft **DOCUMENTS** and Microsoft SharePoint. Using RSB's administration page and the mapping tool that is provided with the installation, you can easily route document images and information from **DOCUMENTS to SharePoint**.



When you use the *DOCUMENTS to SharePoint Connector* in production, documents are automatically sent to the document library you specify. You can also fill column information in SharePoint with captured information from your documents.

Key concepts and features

The *DOCUMENTS to SharePoint Connector*:

- Automatically sends documents from DOCUMENTS to SharePoint.
- Uses document information from DOCUMENTS to add meta-data to the documents in SharePoint. The meta data can be very useful for searching and creating views, and making information available to your organization.
- Provides document tracking and troubleshooting functions.
- Quick and easy setup compared to traditional methods.



Components

The DOCUMENTS to SharePoint Connector is composed of the following parts:

- **RSB Add-on for DOCUMENTS**—connects DOCUMENTS to the DOCUMENTS adapter.
- **DOCUMENTS adapter**—transforms invoice data to a common format.
- **RSB**—coordinates communication between adapters.
- **SharePoint adapter**—sends invoice data and image files to SharePoint.

Supported systems

The following systems are supported:

- ReadSoft DOCUMENTS 6-4 or newer.
- ReadSoft Service Bus.
- Microsoft SharePoint 2007 and newer, including SharePoint 365.

Installation

The DOCUMENTS to SharePoint Connector installation contains two parts:

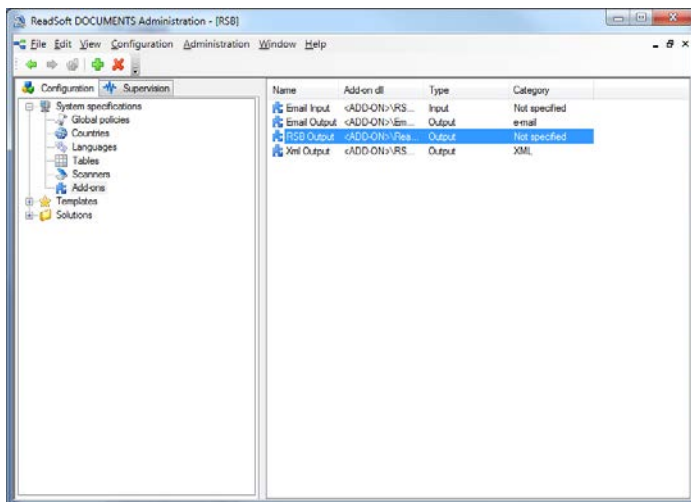
- **ReadSoft Service Bus and the adapters** - installs on any computer with network access to DOCUMENTS and SharePoint.
- **RSB plug-in for DOCUMENTS** – already included with DOCUMENTS and must be activated in the Administration module.

RSB and adapters

Run the RSB installation package on any computer that has network access to DOCUMENTS and SharePoint. You can install RSB on the same computer as DOCUMENTS.

RSB plug-in

When you install ReadSoft DOCUMENTS 6-4 or newer, the RSB Plug-in for DOCUMENTS is installed automatically and appears in the **Add-on** settings. This output add-on can only be used for documents; it does not support output for batches or compound documents.



Configuration

After you install ReadSoft Service Bus and the appropriate adapters, you must configure RSB. The basic steps you perform are:

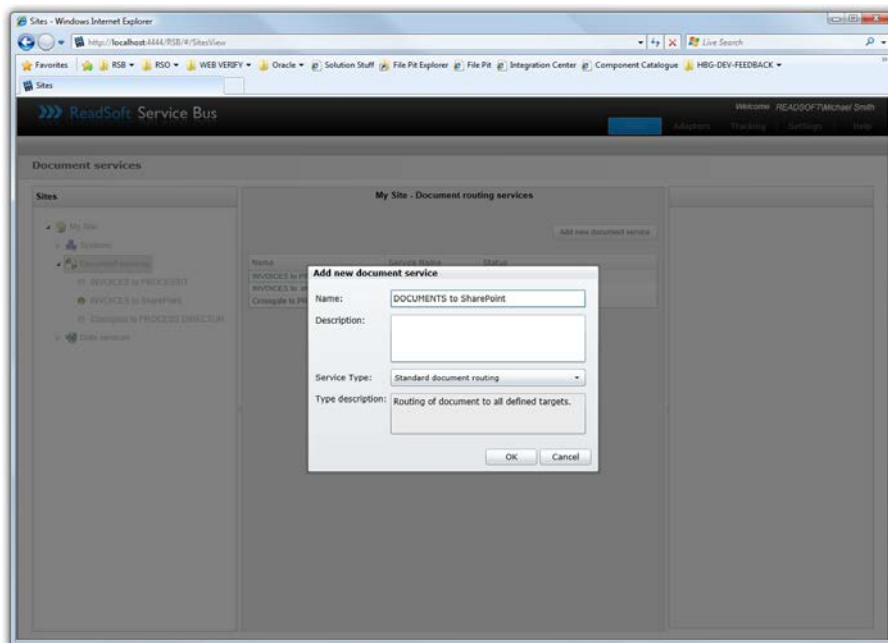
1. [Create a document service](#) to coordinate the transfer of documents.
2. Configure source and target activity settings according to the systems involved.
3. [Configure the RSB plugin \(add-on\)](#).
4. [Map fields](#) between the systems.

Create a document service

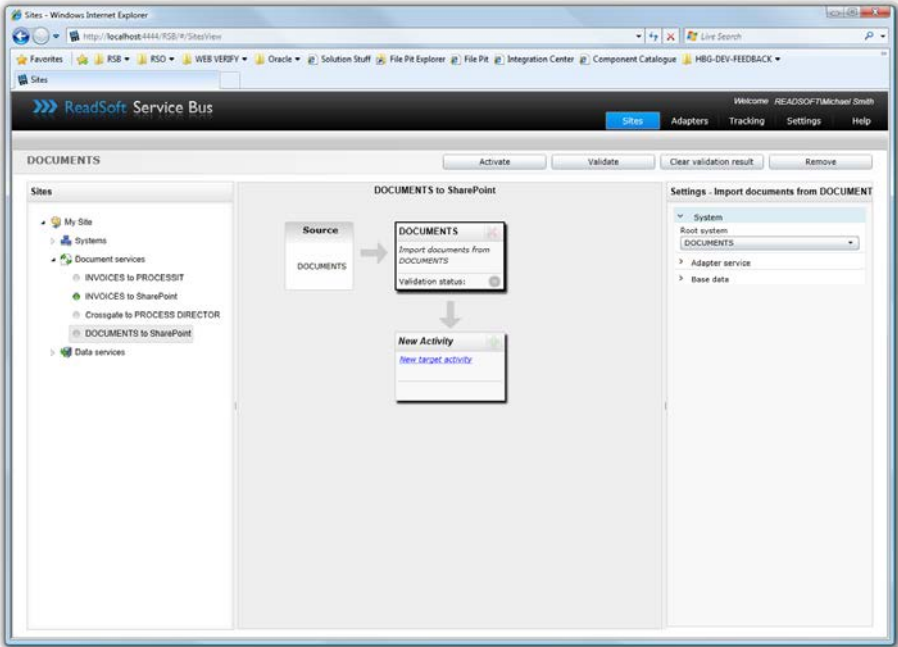
You configure the DOCUMENTS to SharePoint Connector using the RSB administration page.

See Help for more details about the procedures outlined below.

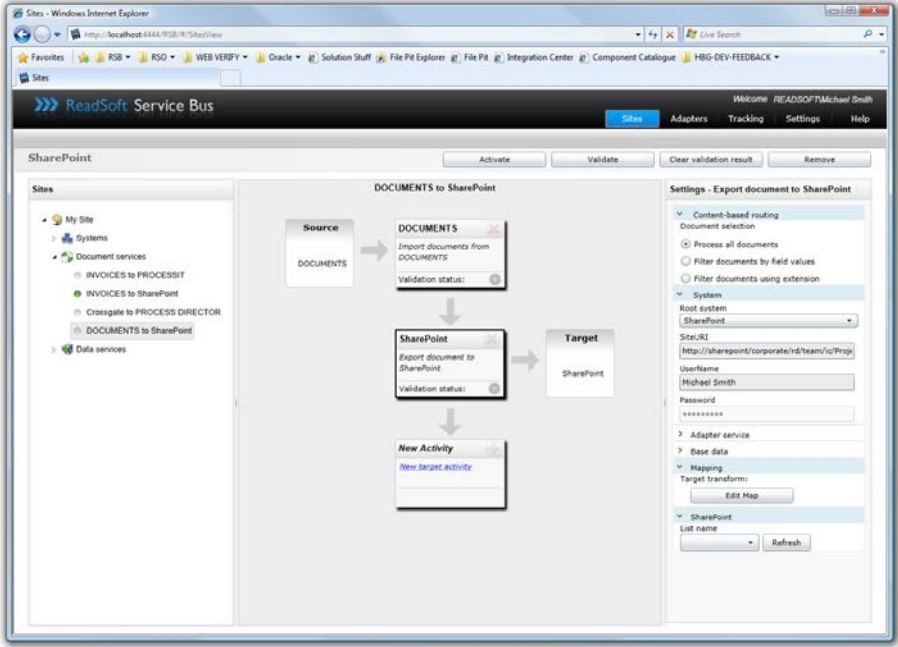
1. Select the **Document services** node and click **Add new document service**.
2. Select **Standard document routing** as the **Service type**.



- 3. Create a new source activity and select **Import documents from DOCUMENTS** as the **Activity**.



- 4. Create a new target activity and select **Export document to SharePoint** as the **Activity**.



- 5. Select the SharePoint activity you created in the previous step and adjust the **User name** and **Password** settings if necessary. These settings specify a SharePoint user that has read and write access to the document library. You can leave these settings blank if the RSB account has read and write access to SharePoint.

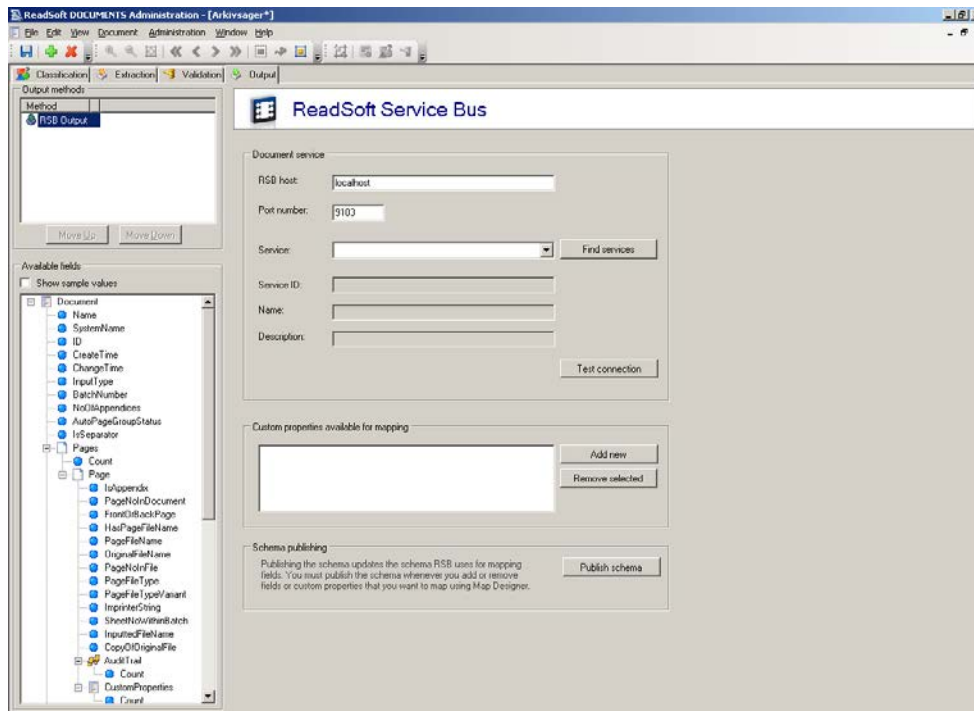
6. Adjust the **Site URI** and **List name** settings. The **Site URI** is the address of the target SharePoint site, and the **List name** is the name of the document library where you want to post invoices.
7. [Configure the RSB plugin \(add-on\)](#).
8. [Map fields](#) between DOCUMENTS and SharePoint.

The activity is now ready for use in the service. Be sure to activate the service configuration before you use it.

Configure the RSB plugin (add-on)

You must configure the RSB plugin for DOCUMENTS before you can send invoices to SharePoint. To configure the RSB plugin for DOCUMENTS:

1. Using the ReadSoft DOCUMENTS Administration, expand the **Solutions** folder and expand the solution that contains the document specification you want to use with RSB.
2. Select the **Documents** node and double-click the document specification you want to export. Select the **Output** tab in the dialog that appears.



3. Select the RSB plugin in the **Output methods** list.
4. Specify the address to RSB in the **Service** box. If the address is not filled in automatically, type: `net.tcp://localhost:9105/RepositoryService`

...where localhost is the computer name or IP address of the computer where RSB is installed.

ⓘ If you have Output methods in the Batch settings, they override the Output methods in the Document settings defined in this procedure. Therefore, you cannot use Output methods in the Batch settings, if you want to use RSB with DOCUMENTS.

5. Click **Find services** to populate the **Service** box and select the service you want to use in the **Service** box.
6. Click **Test connection** to make sure the connection is working.

RSB Host	The host computer where RSB is installed.
Port number	The port reserved for the service.
Service	Specifies the service you want to use. Click Find services to populate the Service box.
Test connection	Tests the connection to ReadSoft Service Bus and displays the results in a new dialog.
Custom properties available for mapping	Lists custom properties from DOCUMENTS that you can use when mapping fields with Map Designer. <ul style="list-style-type: none">• Add new - displays a dialog for adding a custom property to the list.• Remove selected - removes the selected custom property from the list.
Publish schema	Updates the schemas Map Designer uses for mapping fields.

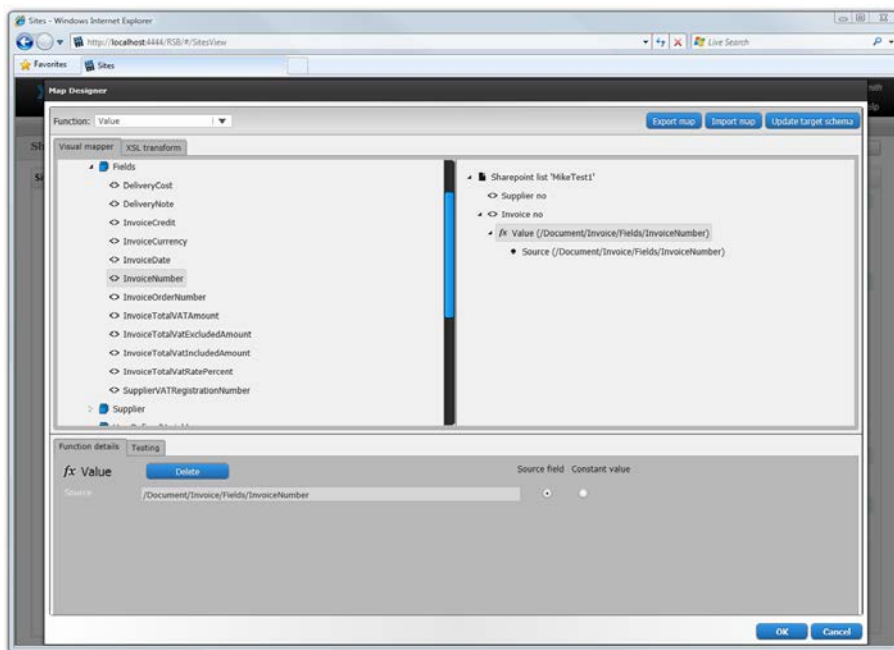
Map fields

Mapping fields between two systems is easily managed using the Map Designer, an integrated tool that lets you connect corresponding fields and apply functions with an easy-to-use drag-and-drop interface.

When you map fields for the DOCUMENTS to SharePoint Connector, you create a map that tells RSB what invoice data you want to appear in columns in the SharePoint document library.

See Help for more details about the procedure below.

1. Select the SharePoint activity in the design area.
2. Click **Edit map (Mapping settings)** to display the **Map Designer** dialog.



3. Select the function you want to perform from the **Function** list. Leave the default function if you want to perform a simple map.
4. Drag-and-drop a field from the source system, on the left side, to the corresponding target field on the right side. Depending on the function you use, you may need to adjust the settings in the Function details tab at the bottom of the dialog.
5. Click **OK** to save the settings.