

FORMS to SharePoint Connector

Product Description

July 2015 – ReadSoft AB

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27072015.1002

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Overview

This document describes the *FORMS 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 FORMS to SharePoint Connector

The FORMS to SharePoint Connector facilitates communication between ReadSoft FORMS and Microsoft SharePoint. Using RSB's administration page and the mapping tool that is provided with the installation, you can easily route document information from FORMS to SharePoint. The FORMS to SharePoint Connector can automatically save form images in document libraries in SharePoint and fill columns in SharePoint with captured form data.

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Documents	6395	8282-8ad8-4873-aa92-2	0440319636	2010-09-24 14:10	Michael Smith	0001	123456
 Shared Documents 	97ca	3740-9a2f-4ce3-8b30-6d	52452b85ee	2010-09-24 14:18	Michael Smith	55542	16573
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When you use the FORMS to SharePoint Connector in production, forms are automatically sent to the document library you specify. You can also fill column information in SharePoint with captured information from your forms.

Key concepts and features

The FORMS to SharePoint Connector:

- Automatically sends documents from FORMS to SharePoint.
- Uses document information from FORMS 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 centralized document-tracking and troubleshooting functions.
- Quick and easy setup compared to traditional methods.



• Support for mapping fields between systems using Map Designer.



Components



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

- **RSB plug-in for FORMS**—connects ReadSoft FORMS to the FORMS adapter.
- FORMS adapter—transforms form data to a common format.
- **RSB**—coordinates communication between adapters.
- SharePoint adapter—sends form data and image files to SharePoint.

Supported systems

The following systems are supported:

- ReadSoft FORMS 5-3 SP2 or newer.
- ReadSoft Service Bus 2-2 SP2 or newer.
- Microsoft SharePoint 2007 and newer, including SharePoint 365.

Installation

The FORMS to SharePoint Connector installation contains two parts:

- **ReadSoft Service Bus and the adapters**—installs on any computer with network access to FORMS and SharePoint.
- **RSB plug-in for FORMS**—must be installed on at least one FORMS Manager module and all Transfer modules.

RSB and adapters

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

RSB plug-in

Run the RSB plug-in installation on at least one FORMS Manager module and all Transfer modules. After you set up RSB, you must configure the plug-in from the Manager module (described later in this document). You do not need to configure the plug-in for the Transfer module.

Configuration

Create a document service

The FORMS to SharePoint Connector can be configured easily using the RSB administration page.

See Help for more details about the procedures outlined below.

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1. Add a new document service.

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FORMS to SharePoint	Activate Validate	Clear validation result Remove
Sites Sites Sites Sites Sites Sites	FORMS to SharePoint	Settings - FORMS to SharePoint Base data ID d40ed651-624a-4536-b3f7-891787d9f91f Name FORMS to SharePoint Description Parent adapter Parent adapter Service type Email notification Send alerts to: Add

2. Create a new source activity: **Import documents from FORMS**.

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FORMS to SharePoint		Activate Validate	Clear validation result Remove
My Site My Site My Systems My Document services FORMS to SharePoint Ø @ Data services	Add New Activity Name: Fd Activity: If Activity Description: In	ORMS mport documents from FORMS	Base data ID d40ed661-624a-4536-b307-891787d991f Name PORMS to SharePoint Description
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3. Create a new target activity: **Export to SharePoint**.

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 A Systems Document services PORMS to SharePoint Data services 	Add New Activity Name: SharePoint Activity: Export document to State Activity Description: Exports document to State System: SHAREPOINT Add ne Image: Comparison of the state	narePoint SharePoint w system OK Cancel	Rock system FORMS Adapter service Base data

- 4. 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 account 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.
- 5. 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 forms.

After you type the **Site URI**, click the **Refresh** button next to the **List name** drop-down. The list displays document libraries from SharePoint that are available.

Configuring FORMS and the RSB plugin for FORMS

You must configure the RSB plugin for FORMS before you can send forms to SharePoint. This procedure assumes FORMS is already installed with a production environment that contains form definitions with job descriptions and transaction descriptions. To configure the RSB plugin for FORMS:

1. Using the FORMS Manager module, set up a form definition with a transaction description and a job description.

2. Select Configure RSB connection (ReadSoft Service Bus menu). The ReadSoft Service Bus dialog appears.

Soft Service Bus			
onnection settings			
ReadSoft Service Bus host:			
localhost	Browse		
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9103			
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Treat set as one unit in output			
If this option is selected, the entire set will be tr to the RSB. If you would like the image sent to ExportImagesBySet flag in Ehglobal.ini and ena Transfer part of the job.	eated as one un contain all form i ble converting o	it (one HSB documer images, you need to if images to multitiff o	ntj when sent activate the or PDF in the
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Select document services			
Manually publish schema used for mapping ins automatically when you select document servic Publish schemas	ide the RSB adm es, but can be fi	min UI. This is norma orced by clicking the	ally done button below

3. Click **Select document services** and use the dialog that appears to specify which job descriptions you want to connect with the document-routing service you created in RSB.

Service selection	×
InstaTest.JOB	Forms 23 SP 🔹
	OK Cancel

Note: active and inactive routes appear in the list.

- 4. Click **OK** to save your settings.
- 5. Click **OK** again in the **ReadSoft Service Bus** dialog. A schema is automatically published to RSB.

Mapping fields

Mapping fields between two systems is easily managed using the Map Designer, an integrated tool in ReadSoft Service Bus that lets you connect corresponding fields and apply functions with an easy-to-use drag-and-drop interface. See Help for more details about the procedure below.

To map fields:

- 1. Return to the document-routing service you created in RSB and 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.

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