



FORMS to SharePoint Connector

Product Description

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Overview

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

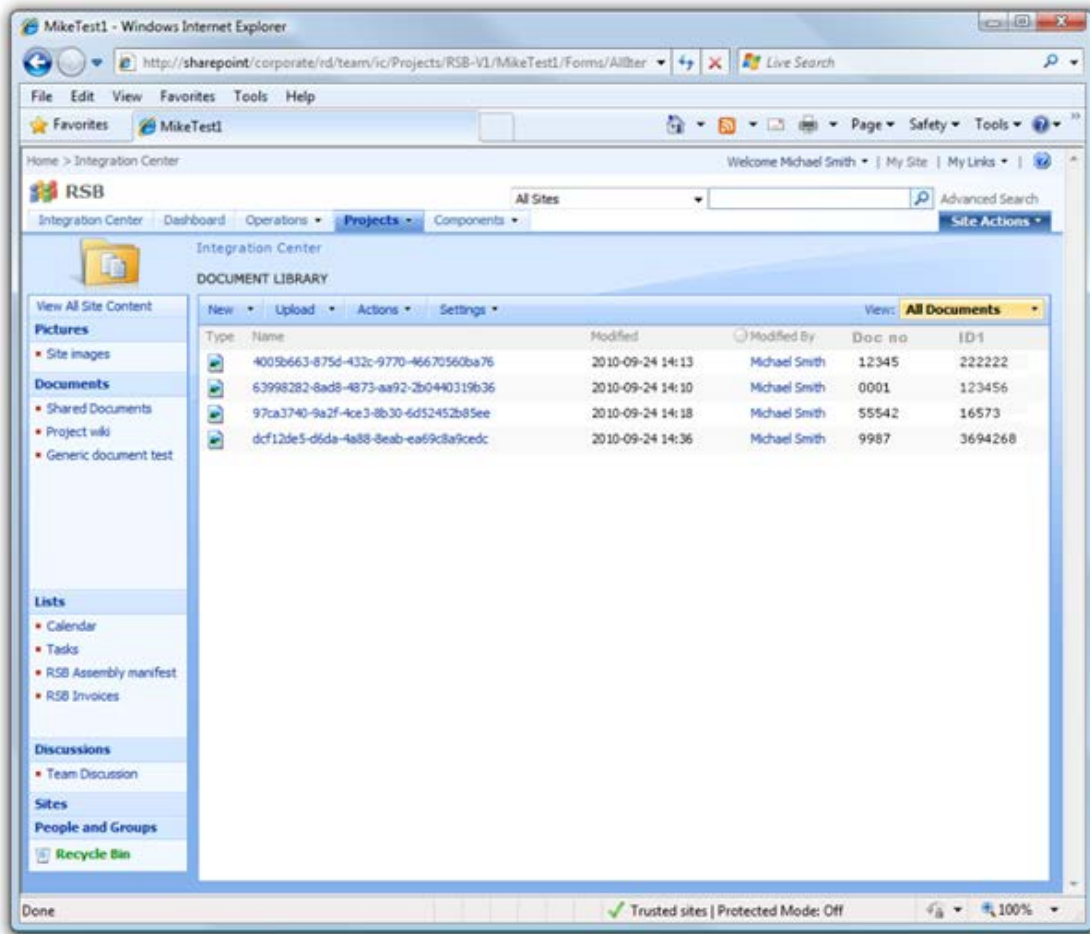
ReadSoft Service Bus is an integration platform that extends ReadSoft solutions by providing universal capabilities for integrating and customizing document-driven processes. ReadSoft Service Bus (RSB) adds high customer value to ReadSoft solutions and reduces solution implementation times for custom 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.

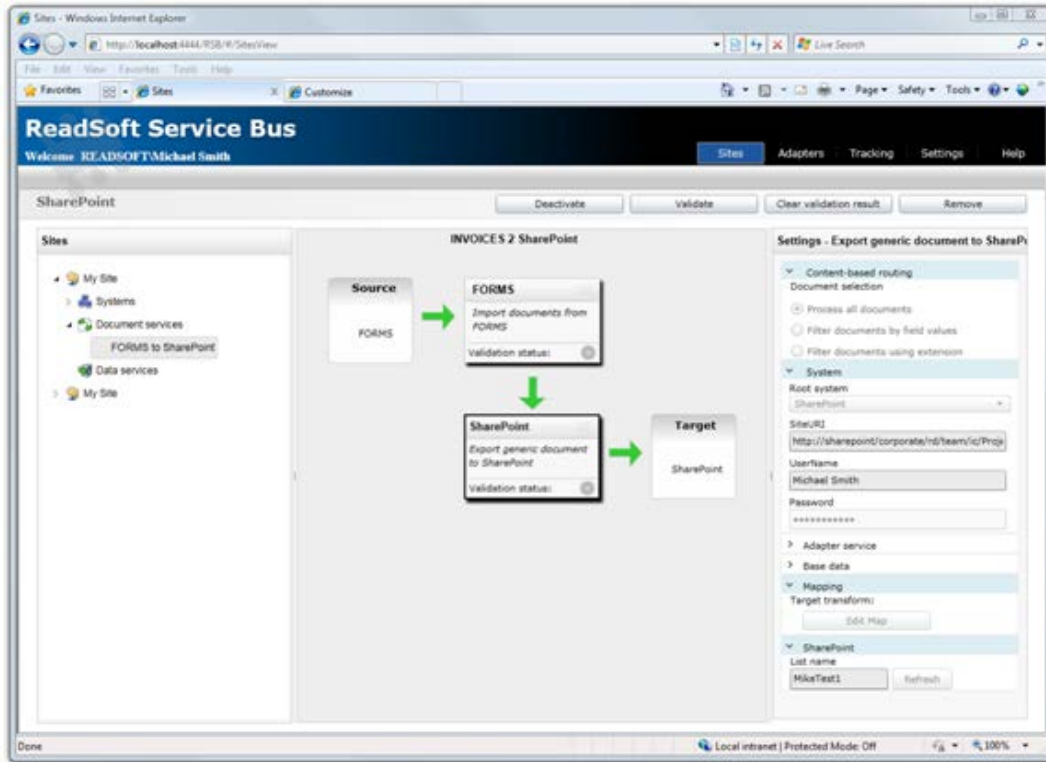


When you use the FORMS to SharePoint Connector in production, forms are automatically sent to the document library you specify. You can also fill column information in SharePoint with captured information from your forms.

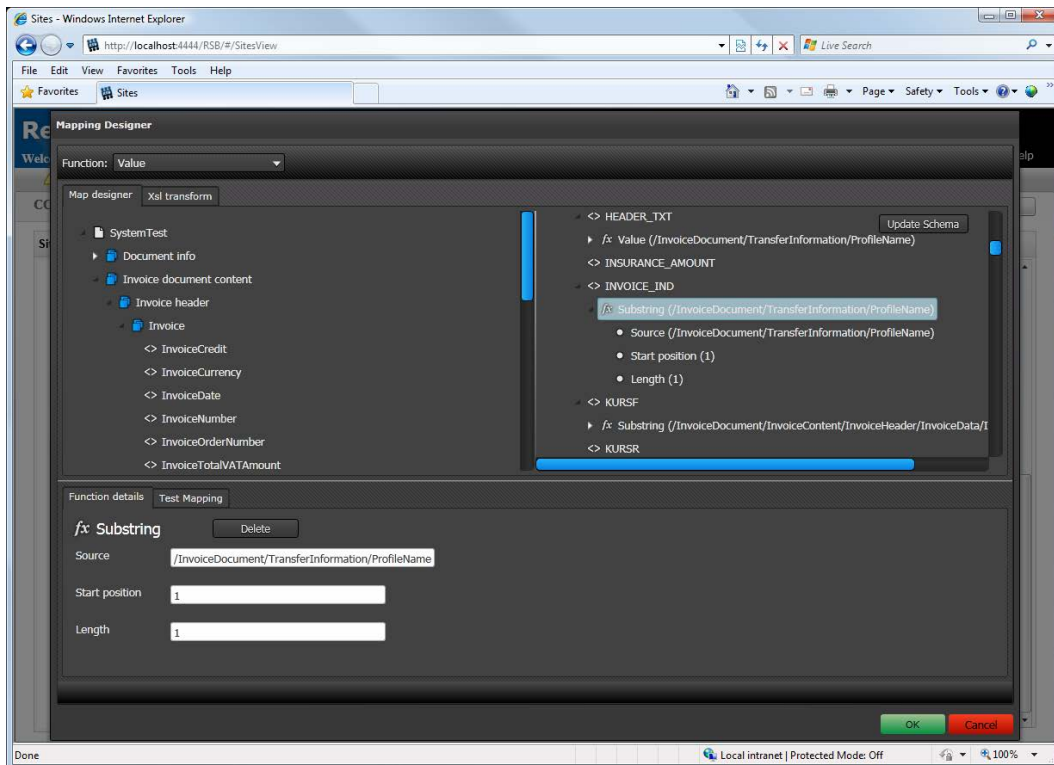
Key concepts and features

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

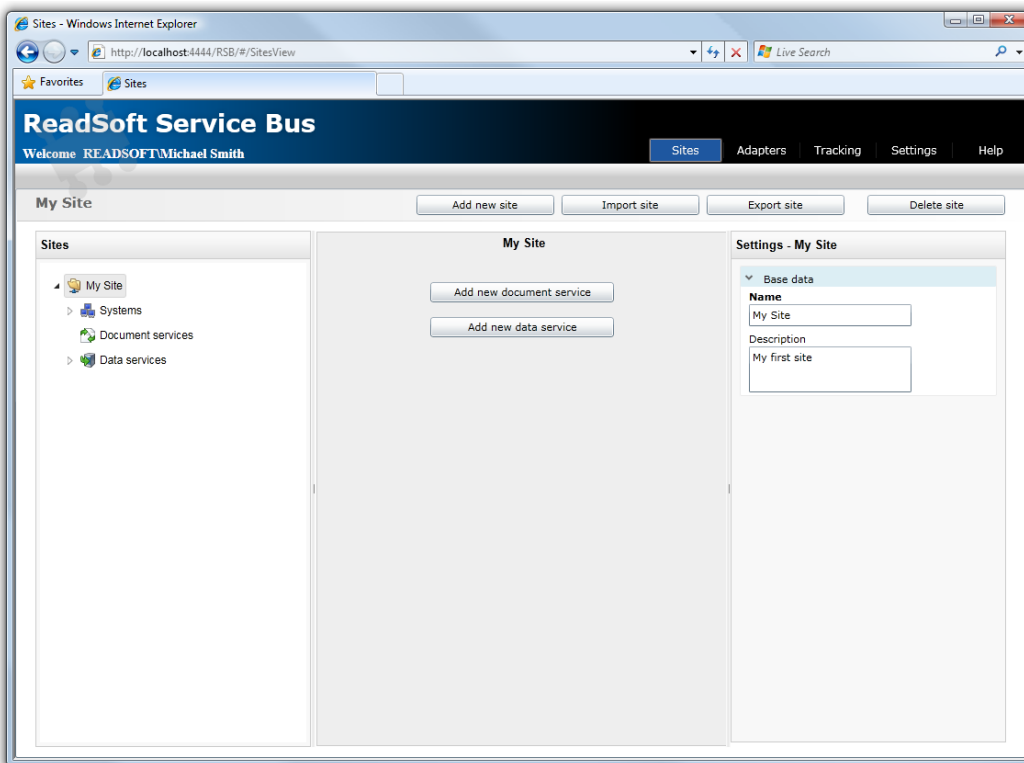
Run the RSB plug-in installation on at least one FORMS Manager module and all Transfer modules. After you set up RSB, you must configure the plug-in from the Manager module (described later in this document). You do not need to configure the plug-in for the Transfer module.

Configuration

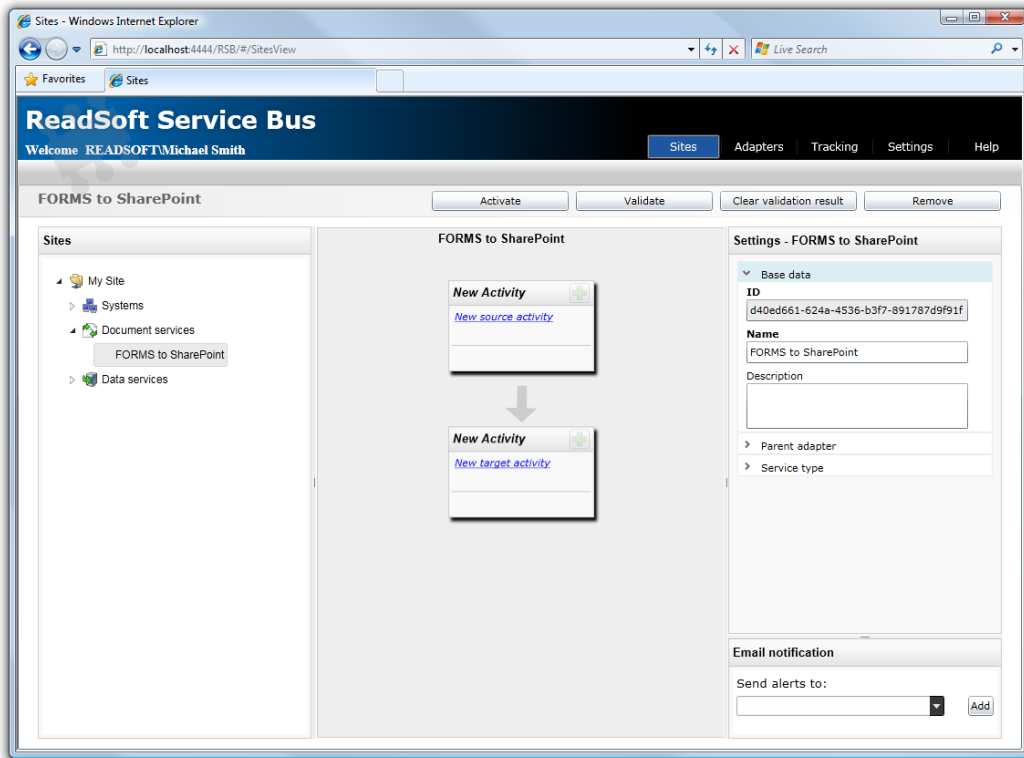
Create a document service

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

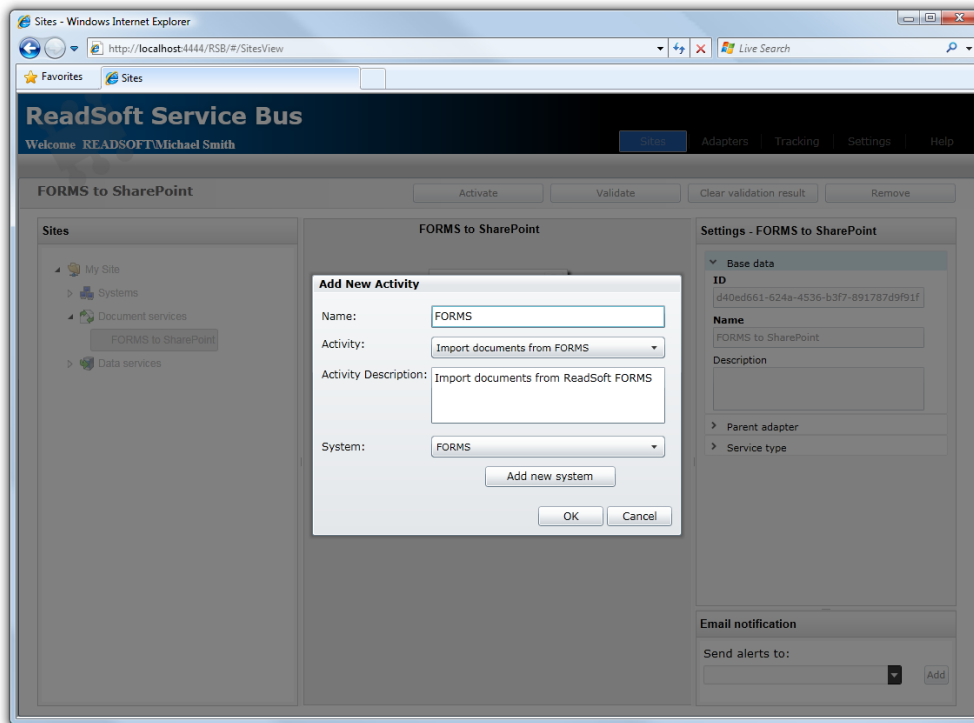
See Help for more details about the procedures outlined below.



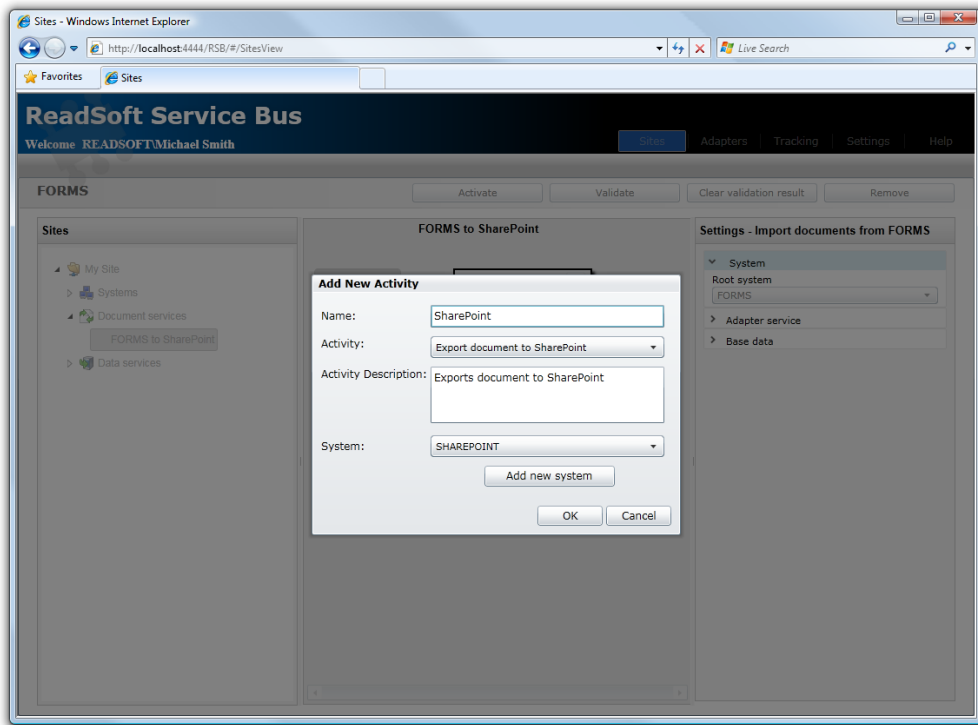
1. Add a new document service.



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



3. Create a new target activity: **Export to SharePoint**.



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.

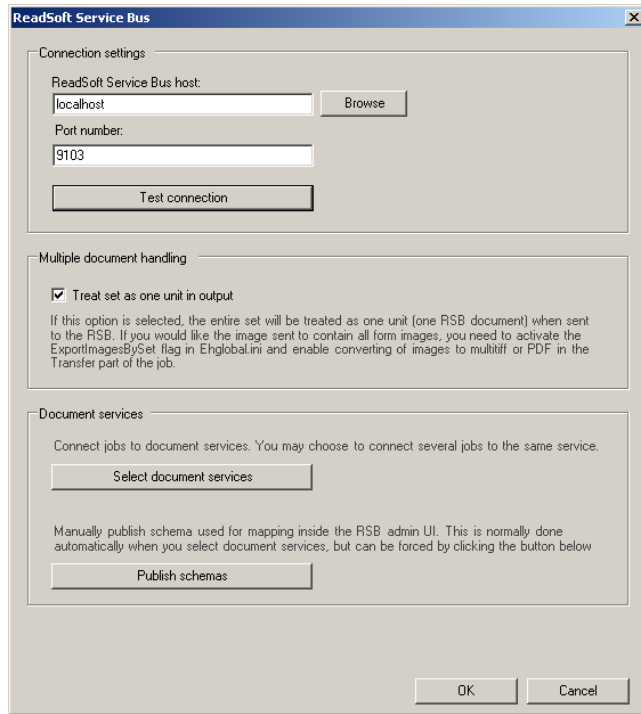
After you type the **Site URI**, click the **Refresh** button next to the **List name** drop-down. The list displays document libraries from SharePoint that are available.

Configuring FORMS and the RSB plugin for FORMS

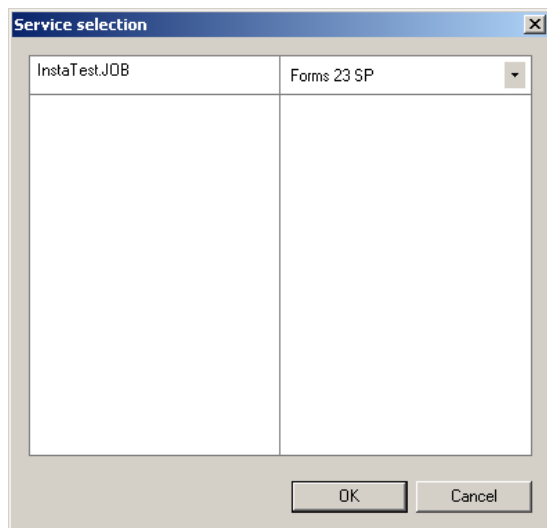
You must configure the RSB plugin for FORMS before you can send forms to SharePoint. This procedure assumes FORMS is already installed with a production environment that contains form definitions with job descriptions and transaction descriptions. To configure the RSB plugin for FORMS:

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.



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.



Note: active and inactive routes appear in the list.

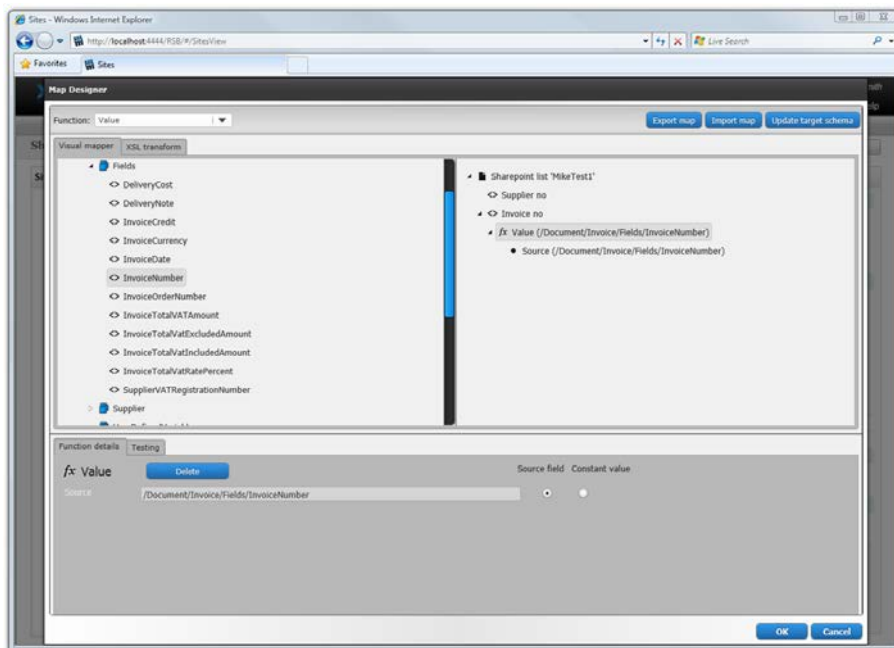
4. Click **OK** to save your settings.
5. Click **OK** again in the **ReadSoft Service Bus** dialog. A schema is automatically published to RSB.

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.