



## **INVOICES to SharePoint Connector**

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# Product Description

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# Overview

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

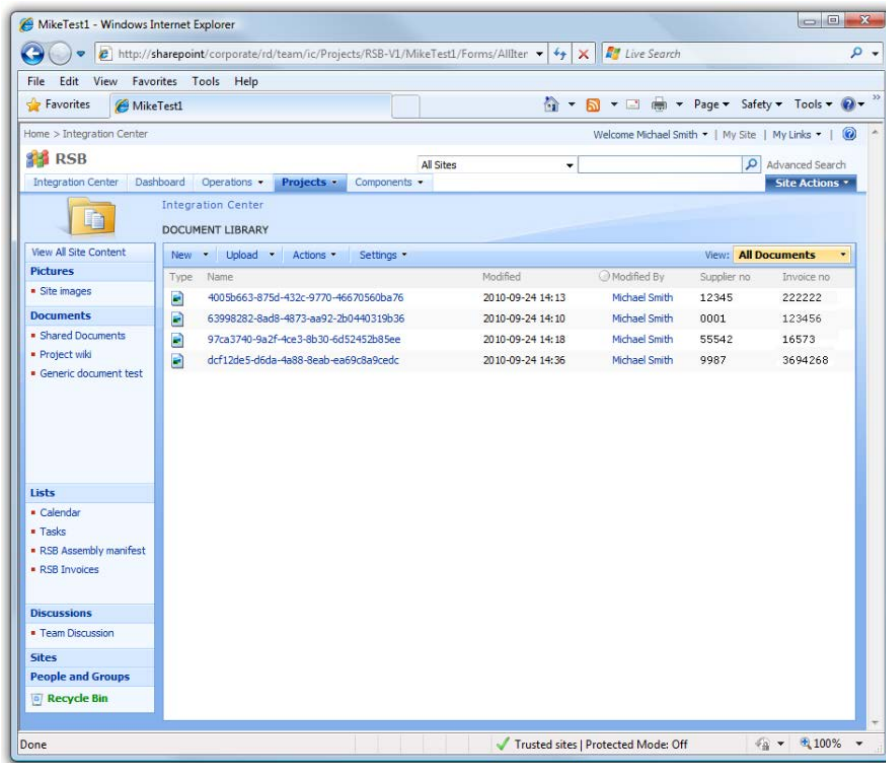
ReadSoft Service Bus is an integration platform that extends ReadSoft solutions by providing universal capabilities for integrating and customizing document-driven processes. ReadSoft Service Bus (RSB) adds high customer value to ReadSoft solutions and reduces solution implementation times for custom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

The *INVOICES to SharePoint Connector* facilitates communication between ReadSoft *INVOICES* 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 *INVOICES* to SharePoint. The *INVOICES to SharePoint Connector* can automatically save invoice images in document libraries in SharePoint and fill columns in SharePoint with captured invoice data.

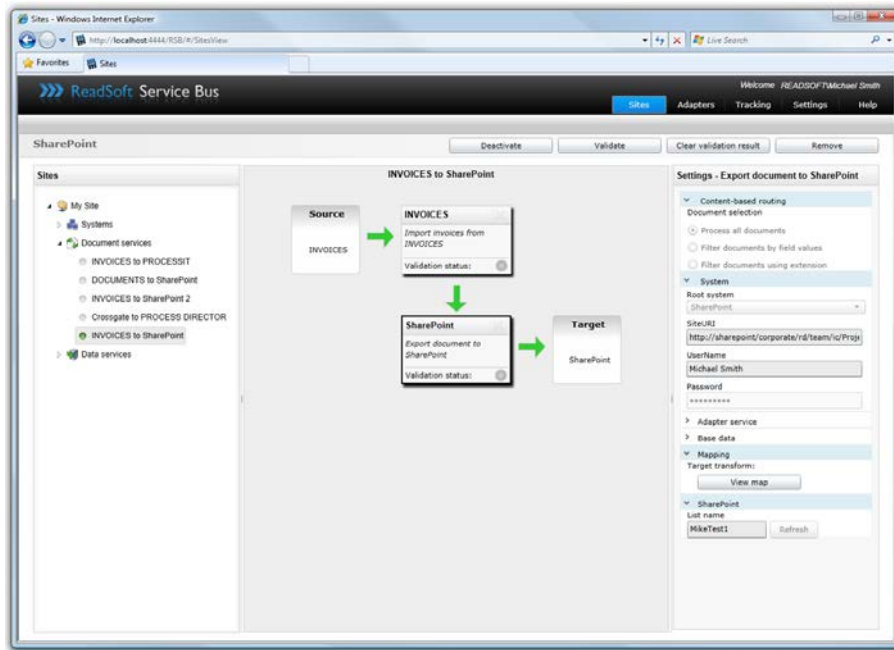


When you use the *INVOICES to SharePoint Connector* in production, invoices are automatically sent to the document library you specify. You can also fill column information in SharePoint with captured information from your invoices.

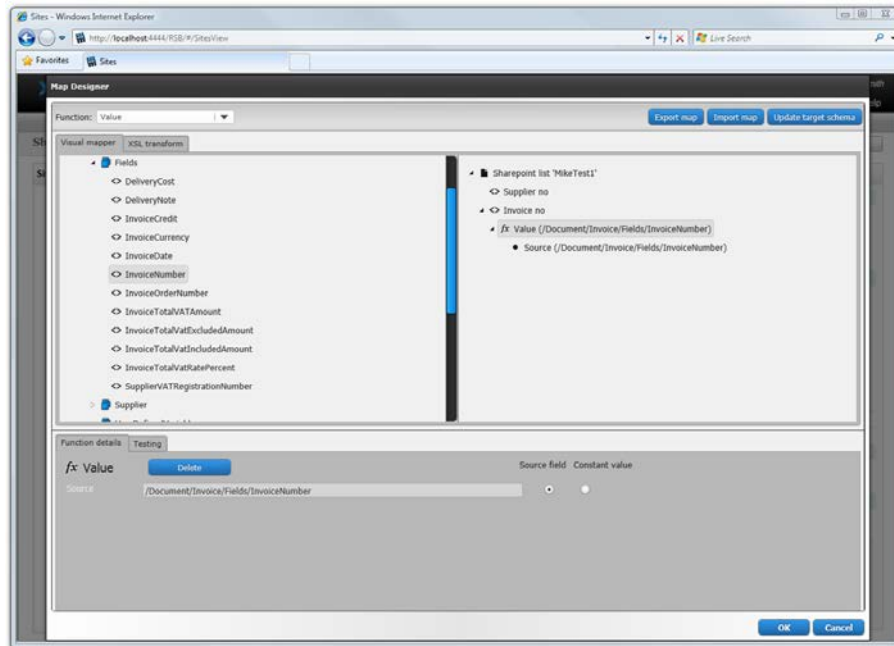
## Key concepts and features

The *INVOICES to SharePoint Connector*:

- Automatically sends documents from INVOICES to SharePoint.
- Uses document information from INVOICES 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 INVOICES to SharePoint Connector is composed of the following parts:

- **RSB plug-in for INVOICES**—connects INVOICES to the INVOICES adapter.
- **INVOICES 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 INVOICES to SharePoint Connector uses ReadSoft Service Bus (RSB). For RSB requirements, see the RSB installation guide. The INVOICES to SharePoint Connector supports the following systems:

- ReadSoft INVOICES 5-5 SP5 Hotfix 1 or newer.
- ReadSoft Service Bus.
- Microsoft SharePoint 2007 and newer, including SharePoint 365.

# Installation

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The INVOICES to SharePoint Connector installation contains two parts:

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

## RSB and adapters

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

## RSB plug-in

Run the RSB plug-in installation on at least one INVOICES 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

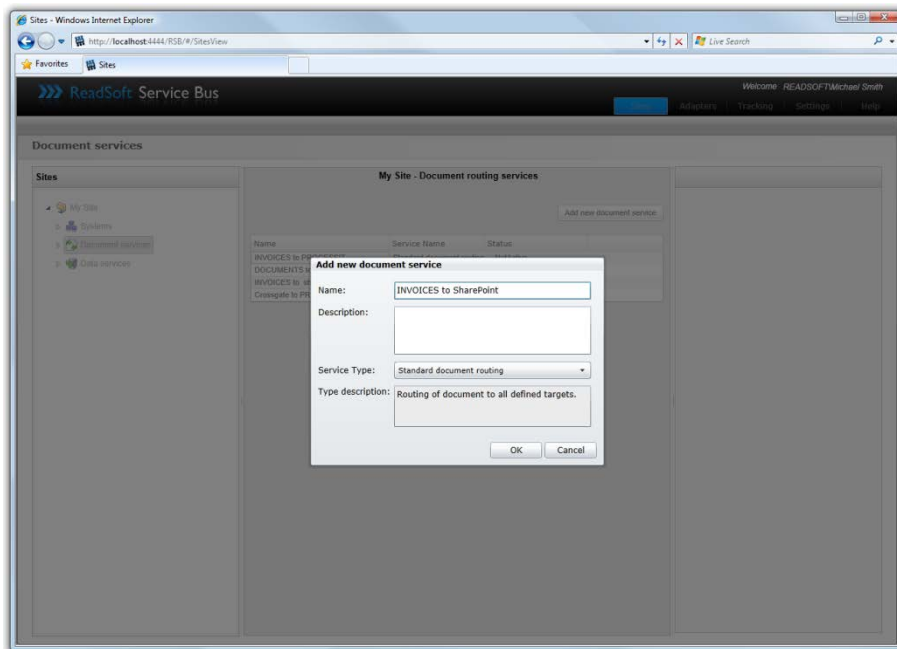
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## Create a document service

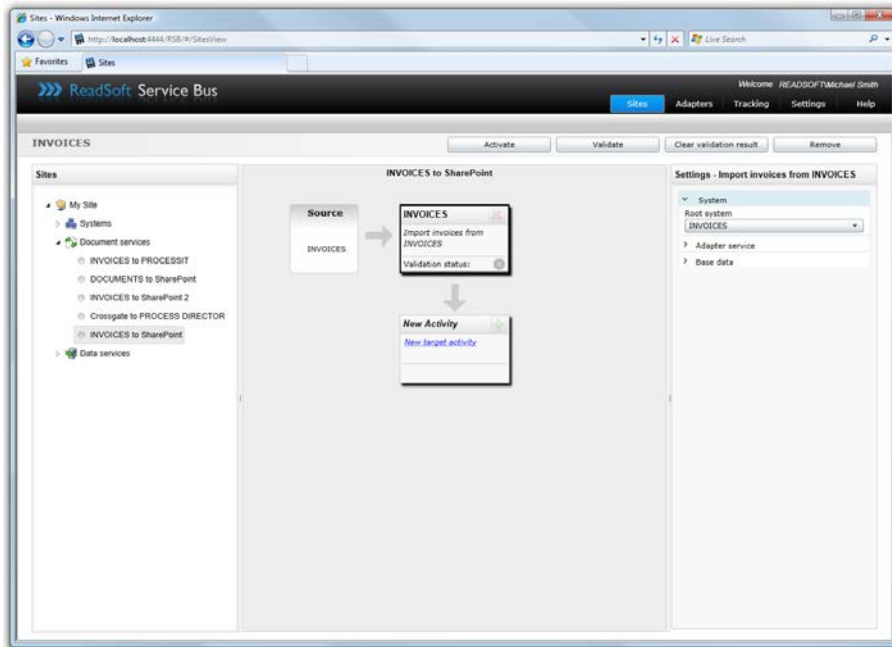
You configure the INVOICES to SharePoint Connector using the RSB administration page.

See Help for more details about the procedures outlined below.

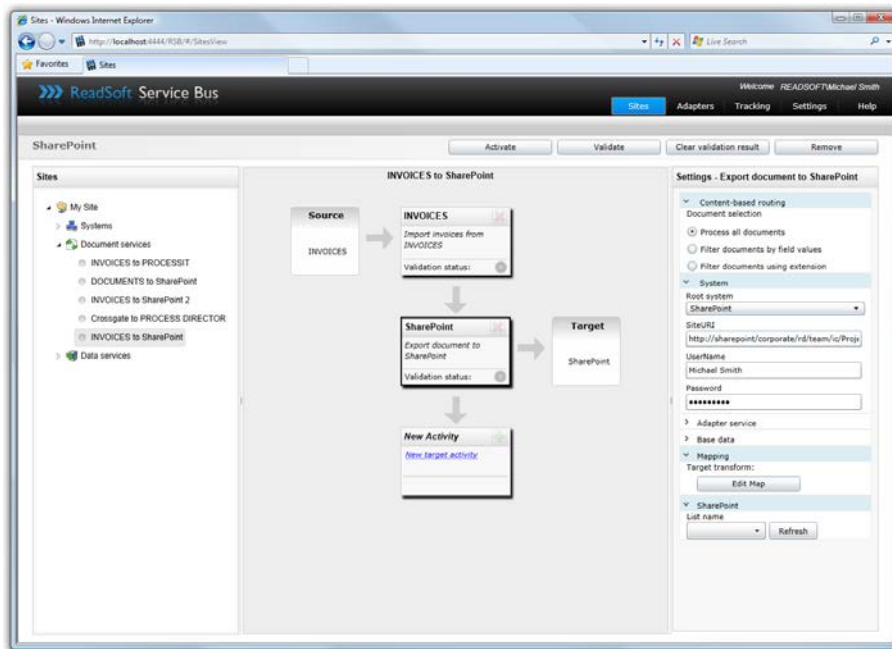
1. Select the **Document services** node and click **Add new document service**.
2. Select **Standard document routing** as the **Service type**.



3. Create a new source activity and select **Import invoices from INVOICES** 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 for INVOICES.](#)
8. [Map fields](#) between INVOICES and SharePoint.

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

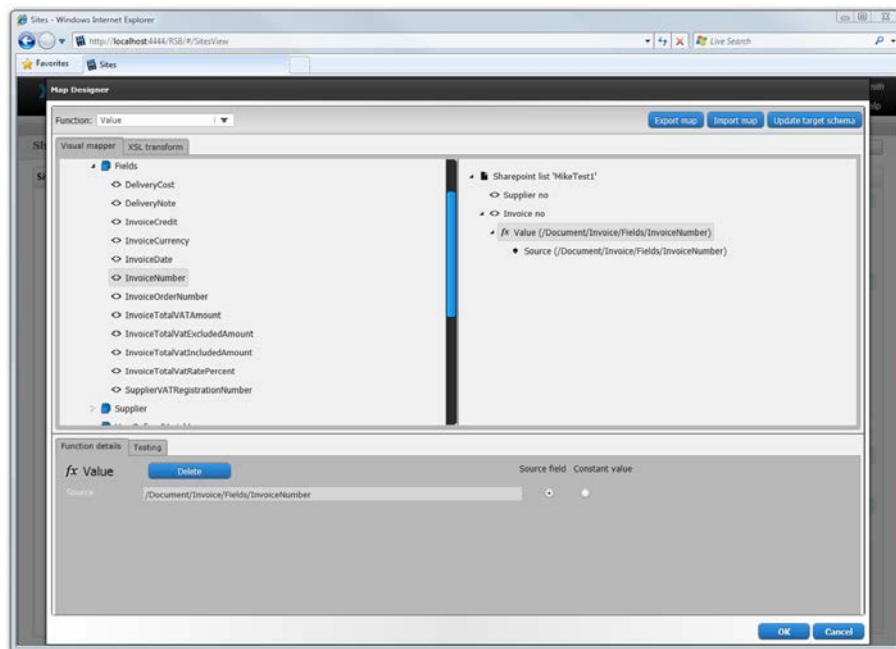
## Mapping fields

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 INVOICES 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.



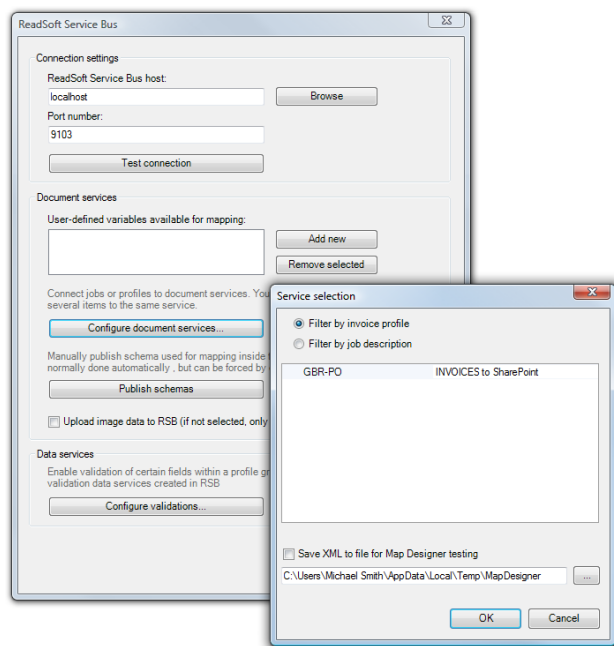
3. Select the function you want to perform from the **Function** list. Leave the default function if you want to perform a simple map.

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.

## Configure the RSB plugin for INVOICES

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

1. Using the INVOICES Manager module, select **ReadSoft Service Bus (Plug-ins menu)**. The ReadSoft Service Bus - Plugin dialog appears.
2. Specify the computer where RSB is installed in the **ReadSoft Service Bus host** box. You can type “localhost” if RSB is installed on the same computer as the Manager module.
3. Click **Configure document services** and use the dialog that appears to specify which invoice profiles or job descriptions you want to use with RSB.



If you select **Filter by invoice profile**, for example, select the appropriate document service from the drop-down list next to the invoice profile you want to connect to RSB.

4. Close the dialog to save the settings.

- ❗ In order to use RSB with INVOICES, you must also enable XML output in the Transfer job description.

