

# SharePoint Target Adapter

## For ReadSoft Service Bus

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## 1 Overview

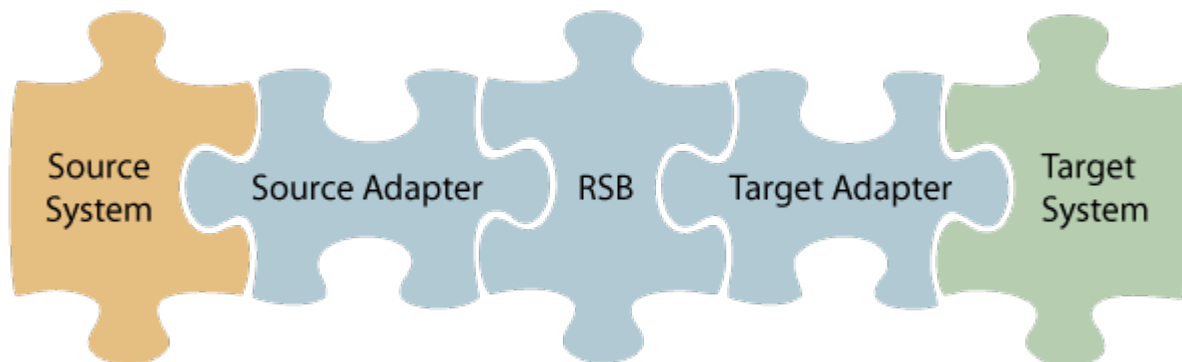
This document describes the SharePoint Target Adapter for ReadSoft Service Bus.

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 adapters to facilitate communication between systems.

- **Source adapters** send data from a source system to RSB.
- **Target adapters** send data from RSB to a target system.

You can combine source and target adapters to connect any system supported by ReadSoft Service Bus.



### 1.1 SharePoint Target Adapter

The SharePoint Target Adapter sends documents from RSB to Microsoft SharePoint.

### 1.2 Key concepts and features

The SharePoint Target Adapter:

- Automatically transfers documents from RSB to SharePoint.
- Supports field mapping between systems.
- Is quick and easy to set up.

## 1.3 Components

The SharePoint Target Adapter is a part of a larger solution which includes:

- **A source adapter** – moves files and/or data from the source system to RSB.
- **RSB** – coordinates communication between adapters and transforms electronic invoice data to a common format.

Depending on your source system, you may also require an RSB plugin, such as the ReadSoft Service Bus plug-in for INVOICES or the ReadSoft Service Bus plug-in for FORMS.

- **SharePoint Target Adapter** – sends documents to Microsoft SharePoint.
- **Other target adapters** (optional) – you can add other target adapters to send invoices data and images to another target system, such as SAP or Open Text.

## 2 Installation

You can install the SharePoint Target Adapter after you install ReadSoft Service Bus. See the [RSB Installation Guide](#) for more information about installing RSB.

## 3 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 activity settings, if necessary.
3. [Configure target activity settings](#).
4. [Map fields](#) between the source and target system.

Depending on the source adapter and any additional (optional) target adapters you use, you might also need to configure a RSB plug-in or map fields between your systems. Be sure to check the documentation for your other adapters for more information.

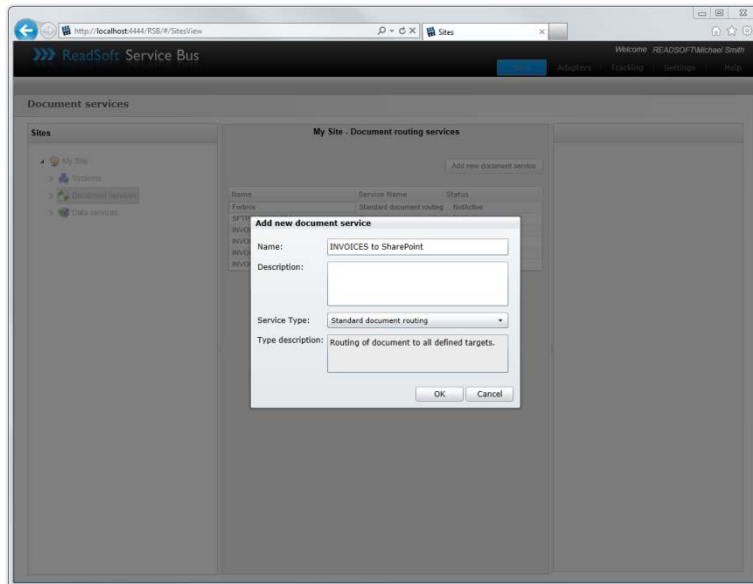
After you complete the configuration, you must activate the document service before you can use it.

### 3.1 Create a document service

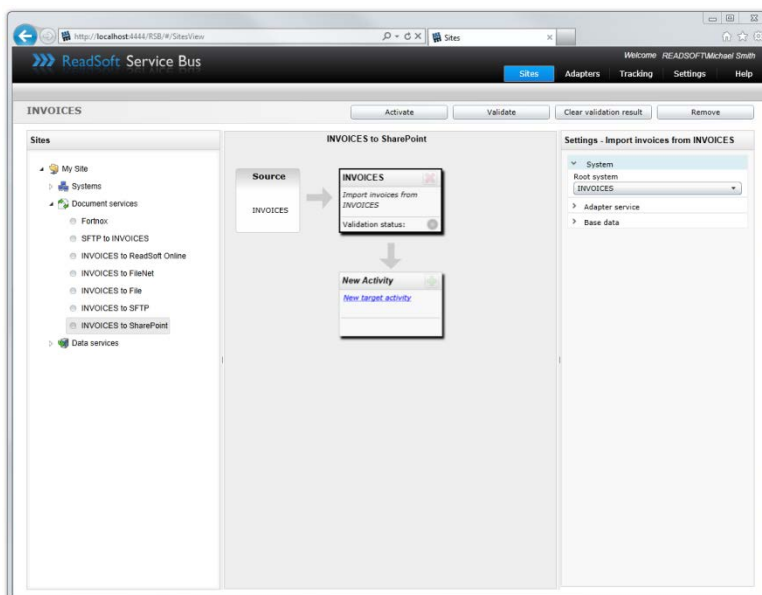
You create a document service and configure the SharePoint Target Adapter using the RSB administration page.

See Help for more details about the procedures outlined below.

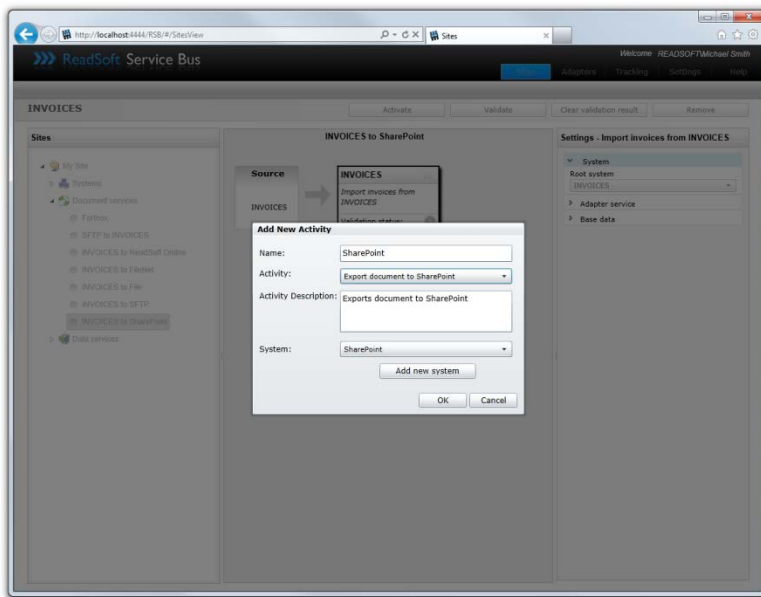
1. Select the **Document services** node and click **Add new document service**.
2. Select **Standard document routing** as the Service type.



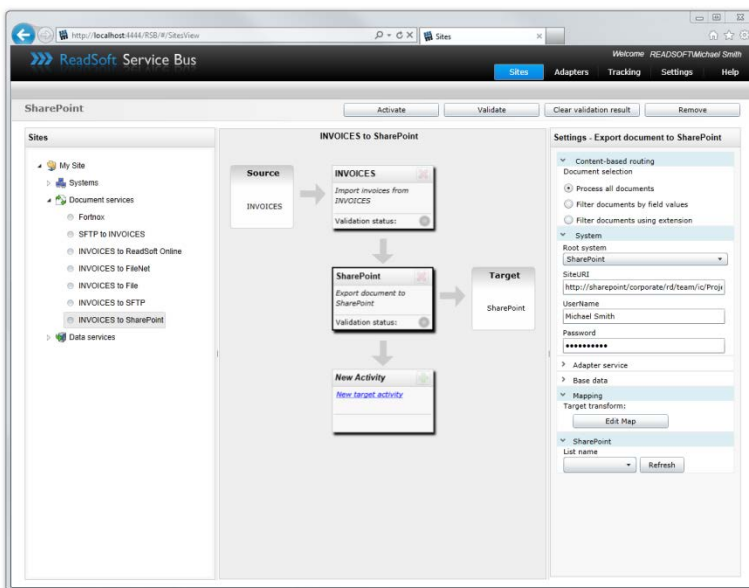
3. Create a new source activity and use the **Activity** setting to specify your source adapter. If there is no **System** to select, click **Add new system** and use the dialog that appears to describe the target system.



4. Create a new target activity and select **Export document to SharePoint** as the **Activity**. If there is no **System** to select, click **Add new system** and use the dialog that appears to describe the target system.



5. Specify the **System**, or click **Add new system** and use the dialog that appears to describe the target system.



## 3.2 Configure target activity settings

After you create a document service that uses the SharePoint Target Adapter, there are a few settings you must adjust. Select the target system activity in the design view to view its settings.

### Content-based routing

<b>Process all documents</b>	Process all incoming documents via RSB.
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<b>Filter documents by field values</b>	Processes only documents that meet the filter criteria in the list.
<b>Filter documents using extension</b>	Filters documents using the custom extension you specify.
<b>Add</b>	Displays the Add field filter dialog for adding a new field filter (only displayed when Filter documents by field values is selected).
<b>Remove</b>	Removes the selected filter from the list (only displayed when <b>Filter documents by field values</b> is selected).
<b>System</b>	
<b>Root system</b>	Specifies the system (defined in RSB) that the activity uses.
<b>Site URI</b>	The location of the SharePoint page that contains the documents you want to import.
<b>User name</b>	The user name needed to access the SharePoint page. Leave empty to use the RSB Windows Service account.
<b>Password</b>	The password for the <b>User name</b> above. Leave empty to use the RSB Windows Service account.
<b>Mapping</b>	
<b>Edit Map</b>	Displays the Map Designer, which you can use to <a href="#">map fields</a> between the source and target system.
<b>SharePoint</b>	
<b>List name</b>	The name of the list that contains the documents you want to import.
<b>Refresh</b>	Populates the <b>List name</b> list with the latest names of the document libraries available from the SharePoint system you specified in the System settings.

### 3.3 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.

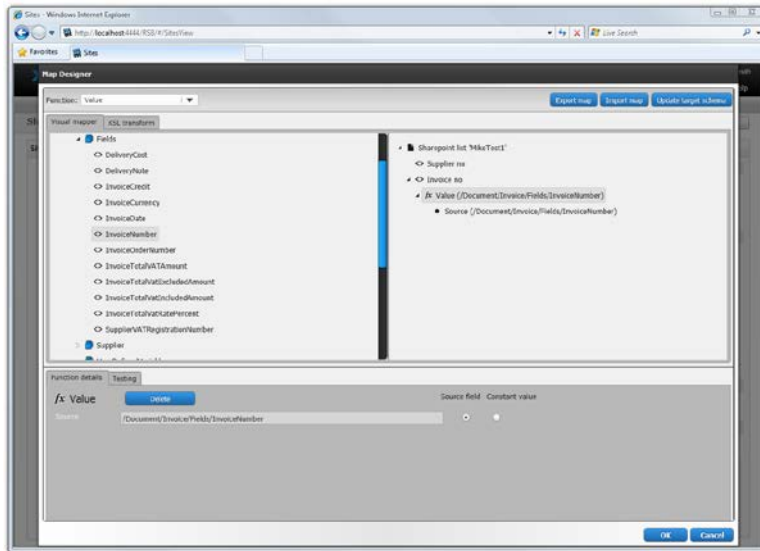
When you map fields between a source and target system, you create a map that tells RSB which fields in the source and target systems correspond to each other.

See Help for more details about the procedure below.

1. Select **Export document to SharePoint** 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.