

12/01/2010

Reform.12

Modular Object Scanning Technology

SharePoint For MOST

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System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- MOST Plugin
- SharePoint Plugin
- MOST SharePoint Plugin
- For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
- For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)
- Microsoft .NET Framework 2.0 (this will be automatically installed if the installer does not find it on the system)
- Microsoft SQL Express 2005 (SQL Server Express will be automatically installed by the SharePoint installer if it is not present on the current system)
- SharePoint 2007, for demonstrations a SharePoint account is provided

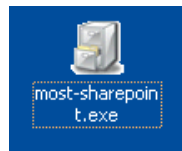
All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

Hardware Requirements

Please reference both the SharePoint Plugin Documentation and MOST Documentation regarding Hardware Requirements.

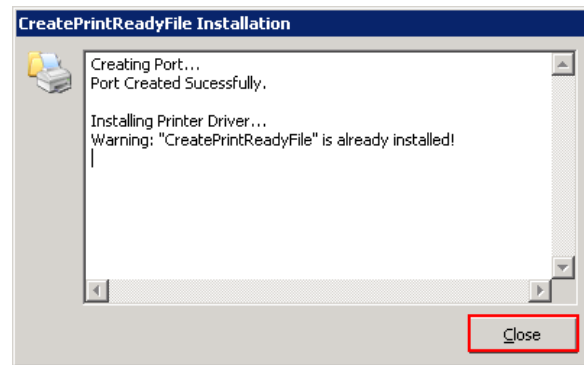
Installation

To install MOST-SharePoint to your existing Reform 12 installation, you will need to download and run the MOST-SharePoint installation executable.



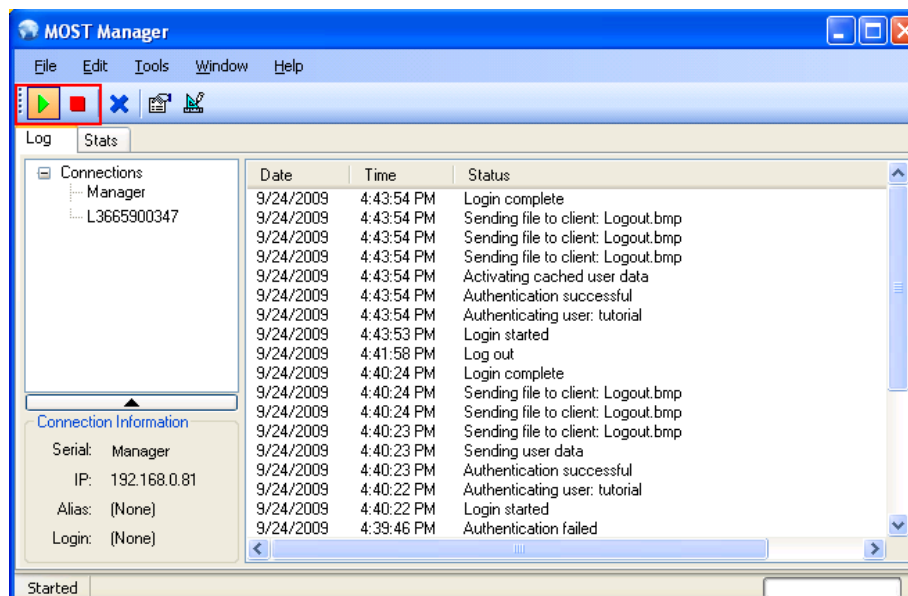
Step through the prompts and accept the User License Agreement. The installation will begin. Allow the installation to complete and then read on to the next section to learn how to set up MOST SharePoint integration.

You may see a prompt about a printer being already installed. Click **Close** to continue.

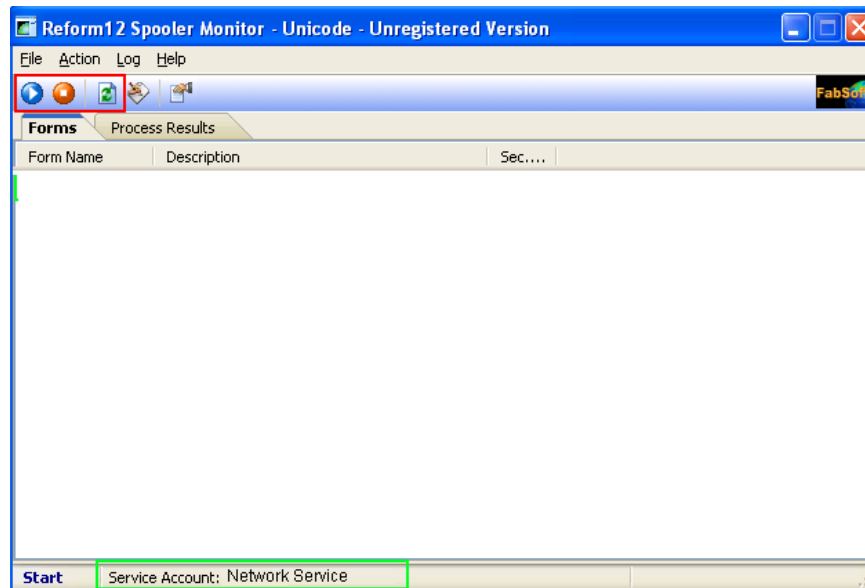


The default installation directory for Reform 12 and its plugins is **C:\Program Files\Reform...**. If you have changed the path during the Reform installation routine, or if you are using a 64 bit operating system, please refer to the appropriate path instead of the default one referenced throughout this documentation.

After the installation, the MOST Manager should be restarted (may be running as a service) as it requires newly added files to be loaded upon startup. To open the MOST Manager, go to **Start>Programs>Reform...>MOST>Manager**. Press the red **Stop** button and then the green **Start** button to restart it.



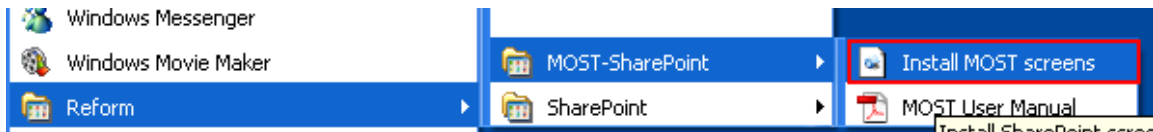
The Reform Spooler Service must also be restarted. Open up the Spooler by going to Start>Programs>Reform...>Spooler. Click the Refresh button or the red stop button and then the blue start button.



Importing MOST Screen

Please refer to the MOST manual for more information regarding MOST terminology, MOST Setup, and Connection Test.

To import MOST screens for SharePoint **Go to Start > Programs > Reform...> MOST-SharePoint > Install MOST Screens**



If not already open, MOST Designer will appear. You will be prompted if you want to Import SharePoint into MOST. Click **Yes**. If asked if you want to overwrite files, click **Yes**.

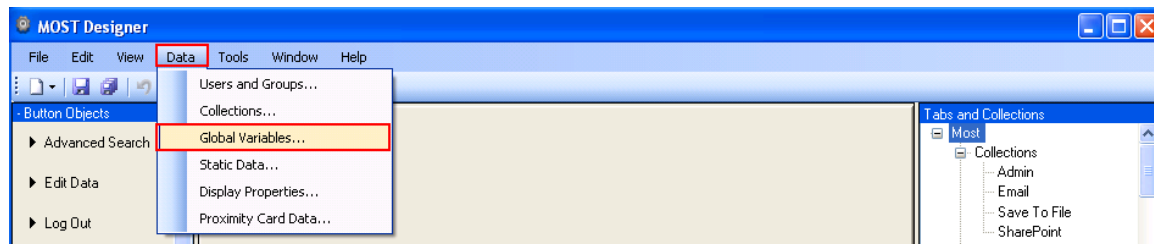


You can leave MOST Designer open as it will be used in the following section.

Setting Global Variables

We need to setup the communication between MOST and SharePoint. To do so, we have to configure certain parameters in MOST's Global variables screen. If the MOST Designer is not already open, go to **Start>Programs> Reform... >MOST>Designer**.

Go to **Data>Global Variables** on the menu bar.

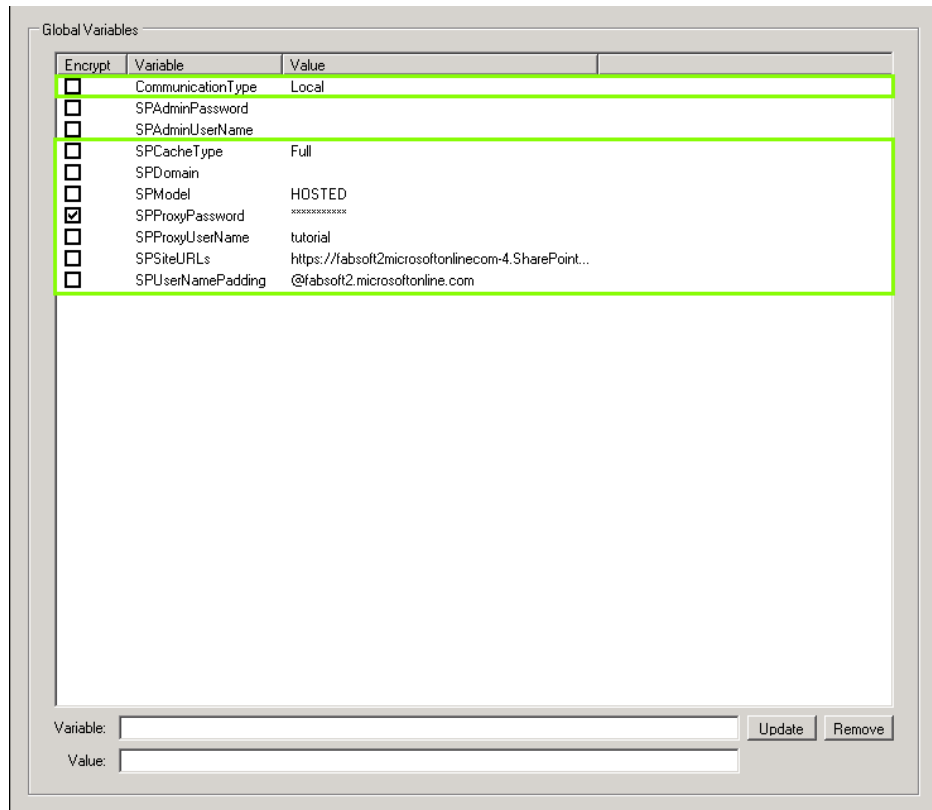


These are the Global Variables required to access our Hosted Demonstration SharePoint server. Your SharePoint server settings may differ. Select each variable one by one, enter its value in the provided box and then click the update button. CommunicationType, SPCacheType and SPModel global variables allow you to select available values from a drop down list.

1. Variable Name = **CommunicationType** Value= **Local**
2. Variable Name= **SPCacheType** Value = **Full**
3. Variable Name= **SPModel** Value= **HOSTED**
4. Variable Name = **SPProxyPassword** Value= Go To:
<http://most3.fabsoft.net/SharePoint/> to get the current password.
5. Variable Name = **SPProxyUserName** Value= **tutorial**
6. Variable Name= **SPDomain** Value=
7. Variable Name= **SPSiteURLs** Value= **https://fabsoft2microsoftonlinecom-4.SharePoint.microsoftonline.com**
8. Variable Name= **SPUserNamePadding** Value= **@fabsoft2.microsoftonline.com**

***CommunicationType specifies whether or not the MFP is reachable by IP from the MOST server. If the MFP is reachable by IP from the MOST server, the CommunicationType should be set to "Local". If the MFP is on a remote (wide area) network, the CommunicationType should be set to "Remote". (Remote printing may be required in the MOST Manager)**

Note: SPModel has two options, Hosted and Internal. Hosted should be used if each user's SiteURL is the same. Internal should be used if a username has to be appended to each user's SiteURL.




SPAdminPassword and **SPAdminUsername** global variables are only required if using multiple SharePoint Sites.

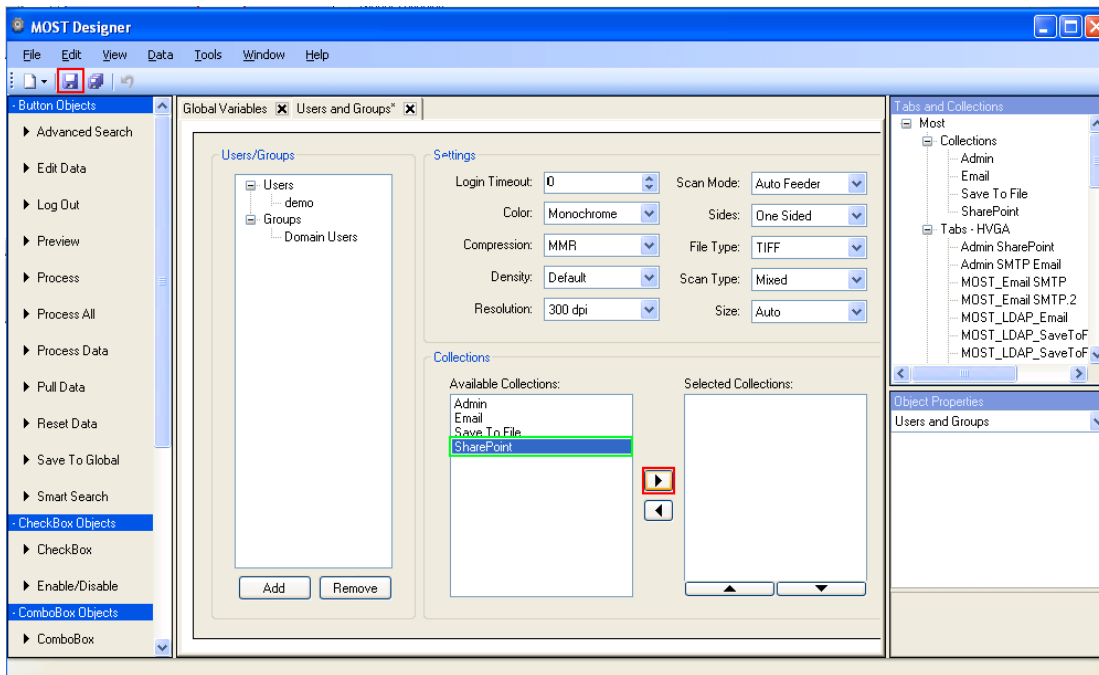
For our demonstration server, we use a Proxy Username and Password in order to authenticate to the Hosted SharePoint server. This means that any user who logs into MOST and utilizes the SharePoint collection will be doing so using the Proxy information. If a Proxy Username and Password is not specified, the user's MOST credentials will be used to authenticate to SharePoint. The SPUseNamePadding variable is used to append the SharePoint server information to the user's login name in order to authenticate using the full credentials.


Click **File>Save** or use the small save icon  to save all the global variables.

Assigning Collection to Users

1. Open your MOST Designer if not already opened (**Start>Programs> Reform...>MOST>Designer**).
2. On the MOST Designer tool bar, click on **Data > Users and Groups**
3. Select the **demo** user from the User/Groups list. We will be adding the SharePoint collection for this user. The same process can be used for any user or group.

4. Select **SharePoint** from the Available Collections and click the  to add the SharePoint collection.




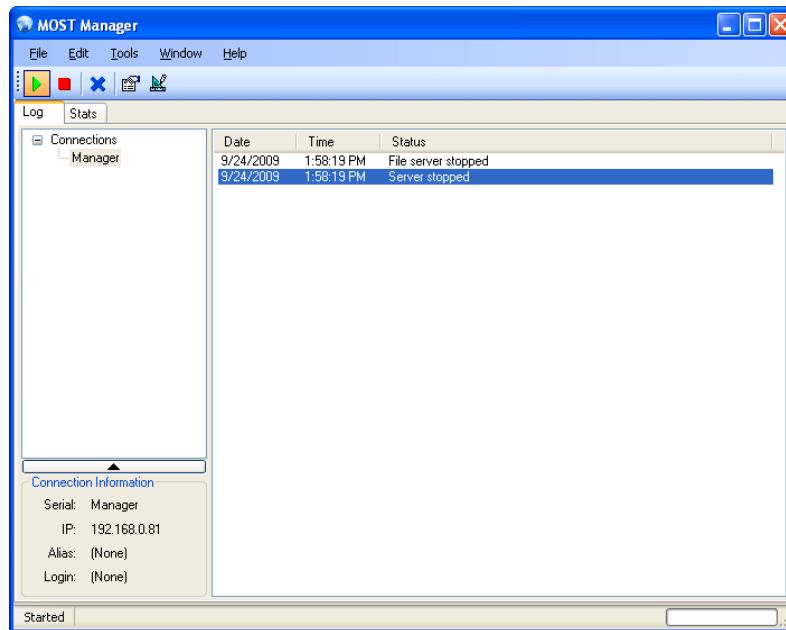
5. **File>Save** or use the small save icon  to save your changes.

MOST Configuration to Enable Remote Printing of Documents at the MFP

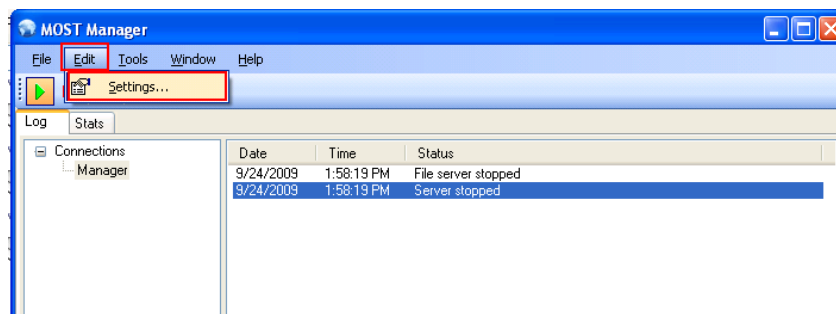
***If CommunicationType global variable is set to Local (MFP can be reached by IP on a local network), this step can be skipped. In order to print documents remotely (when a MFP is not reachable by IP), the CommunicationType should be set to Remote and the following steps should be taken.**

Remote Printing must be enabled in the MOST Manager if the **CommunicationType** is set to **Remote** in the Global Variables configuration.

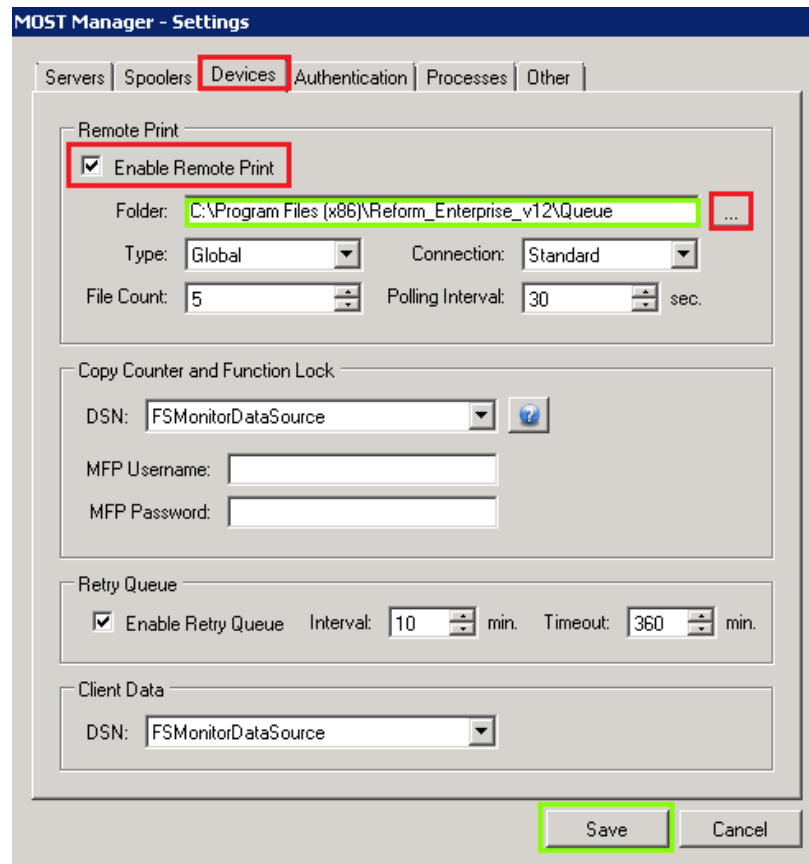
1. To do so, first make sure MOST Manager is open by going to **Start>Programs>Reform...>MOST>Manager**. It may be running in your task bar, so check for the small  icon and **double click** on it to bring up MOST Manager.



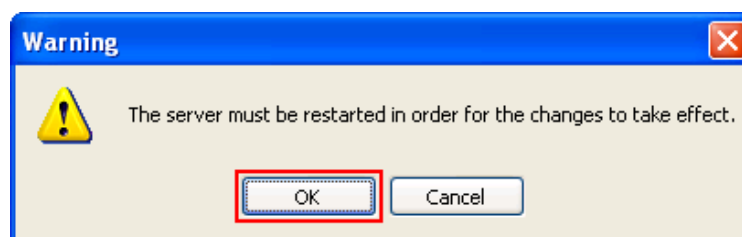
2. Go to **Edit > Settings**



3. Go to the **Devices** tab. Here we need to check the **Enable Remote Print** checkbox if it is not already done so. You must also specify your Reform installation's Queue directory which is usually **C:\Program Files\Reform...\Queue**. Use the browse button to select this directory. The polling interval is how often the MFP will check this directory for documents to print. If 30 seconds is not optimal for your environment, please change it to the desired value.



4. After you have finished configuring Remote Printing, please click the **Save** button. You will be prompted that the server must be restarted, click **Yes**.




You have successfully configured MOST to enable the remote printing of SharePoint documents at your MFP.

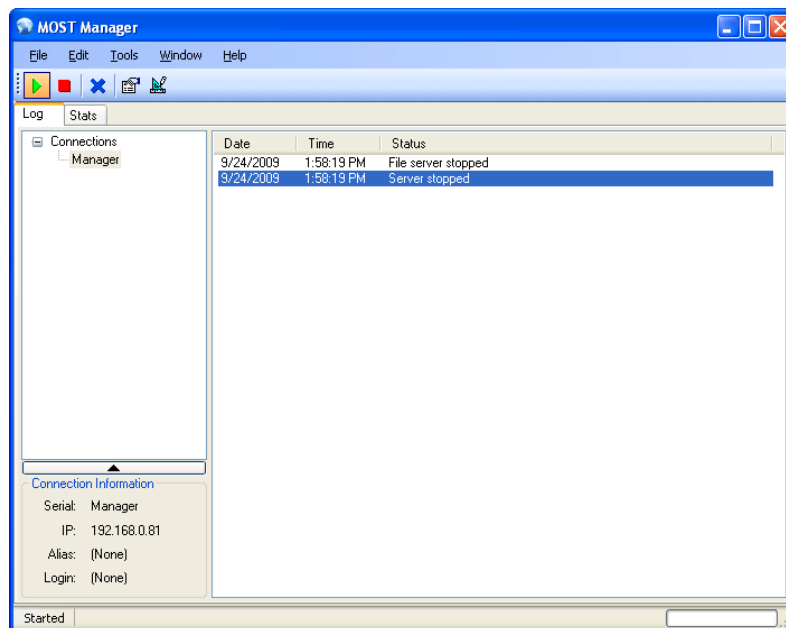
Using Caching with SharePoint

To make the communication between SharePoint and MOST quicker and more efficient, the MOST SharePoint plugin allows you to enable caching via the **SPCacheType** global variable. There are two options for **SPCacheType**: Full or None. If the **None** setting is used for **SPCacheType**, MOST will communicate with the SharePoint server each time the SharePoint tabs are accessed. If **Full** caching is used, each user will have a cache file saved on the MOST server which contains the available SharePoint directories and files.

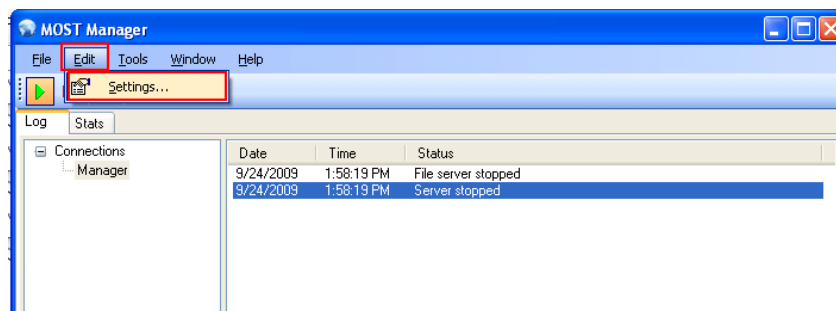
Instead of having to connect to SharePoint each time to retrieve this list, MOST SharePoint will use the cache file.

If using **Full** caching, it is recommended that you run the **SharePoint Full Cache Builder.exe** located in **C:\Program Files\Reform...\Plugins\MOST2** regularly in order to “rebuild” the cache files with the up to date SharePoint server contents. This periodic update will allow any updates, such as file deletion or new directories, to be updated in each user’s cache file. The simplest way to schedule the process to run this update periodically is to use the MOST Manager.

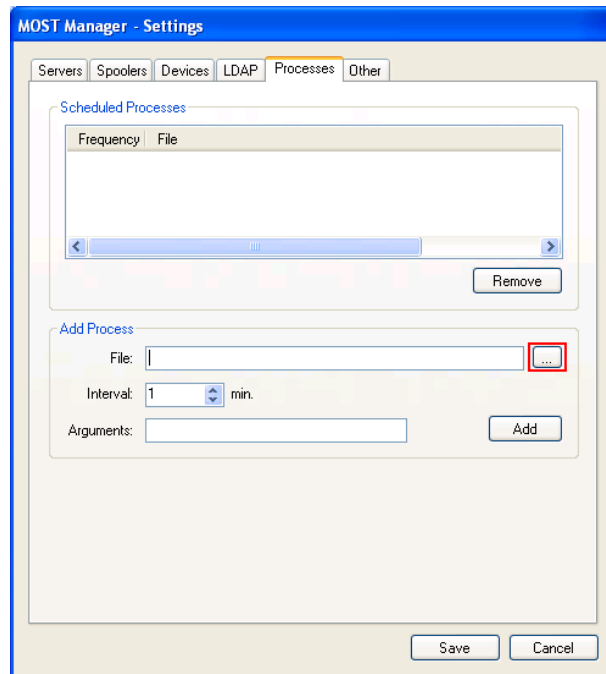
1. Go to **Start>Programs>Reform...>MOST>Manager**. It may be running in your task bar, so check for the small  icon and **double click** on it to bring up MOST Manager.



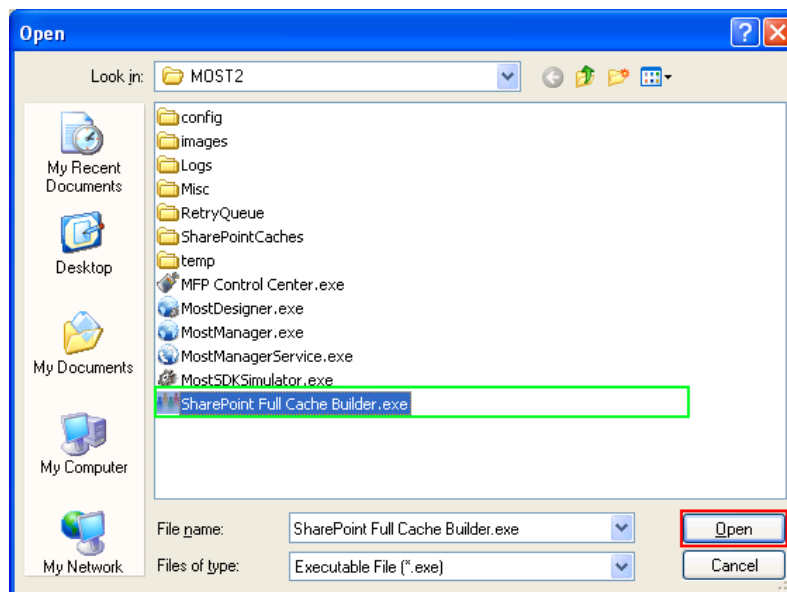
2. Go to **Edit > Settings**



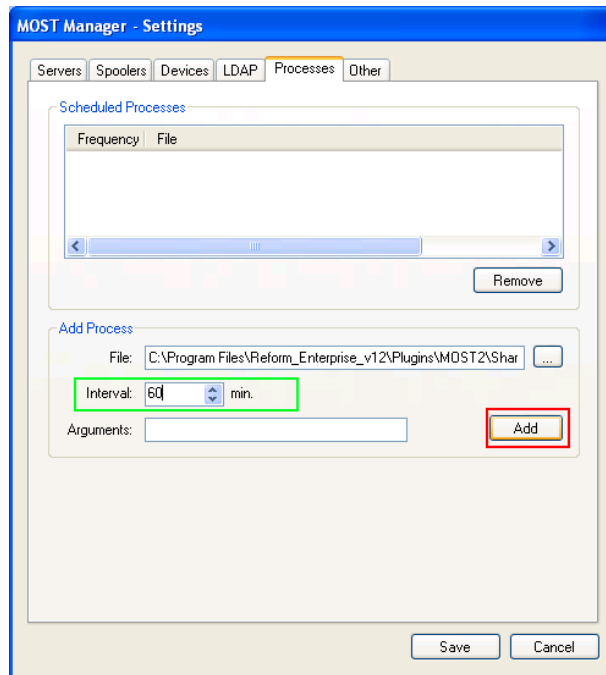
3. Go to the **Processes** tab.



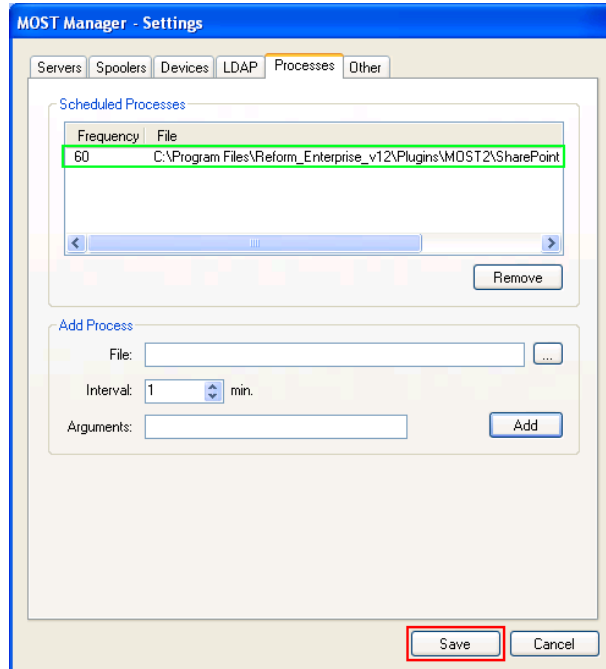
4. Here, we want to select the **C:\Program Files\Reform...\Plugins\MOST2\SharePoint Full Cache Builder.exe** file. To do so, click the button to browse for the file. Select **SharePoint Full Cache Builder.exe** and click **Open**.



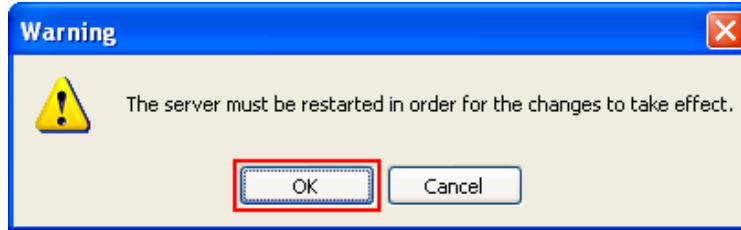
5. The **Interval** is how often MOST will run the exe and update each user's cache. It is recommended to set this to **60 minutes** (1 hour). Depending on your environment, a shorter or longer time period may work better. After setting the interval, click the **Add** button.



6. After adding the file, it will show up in the **Scheduled Processes** list. You can now click **Save**.



7. You will be prompted that the server must be restarted, click **Yes**.

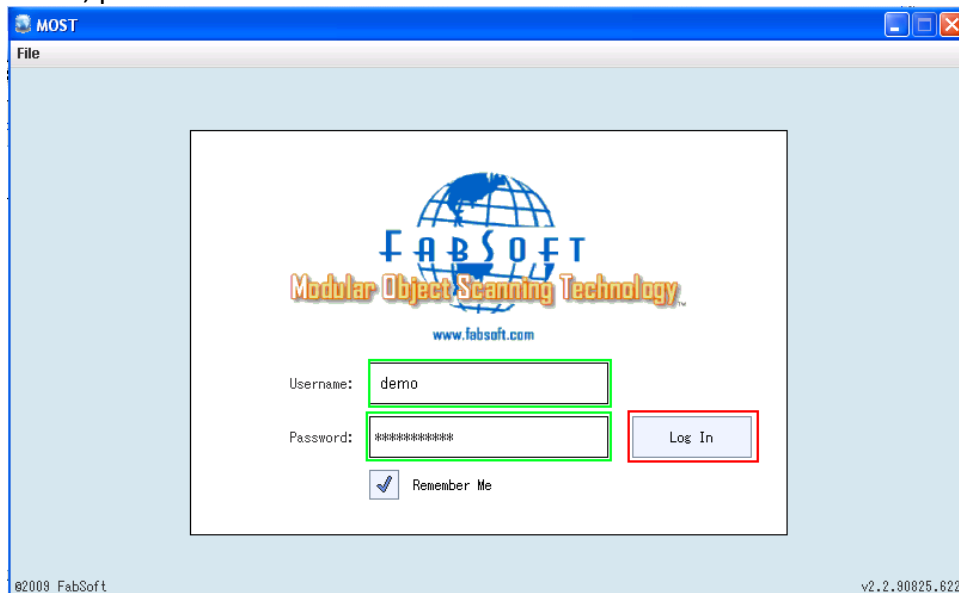


You have successfully configured MOST to rebuild your SharePoint cache automatically every 60 minutes.

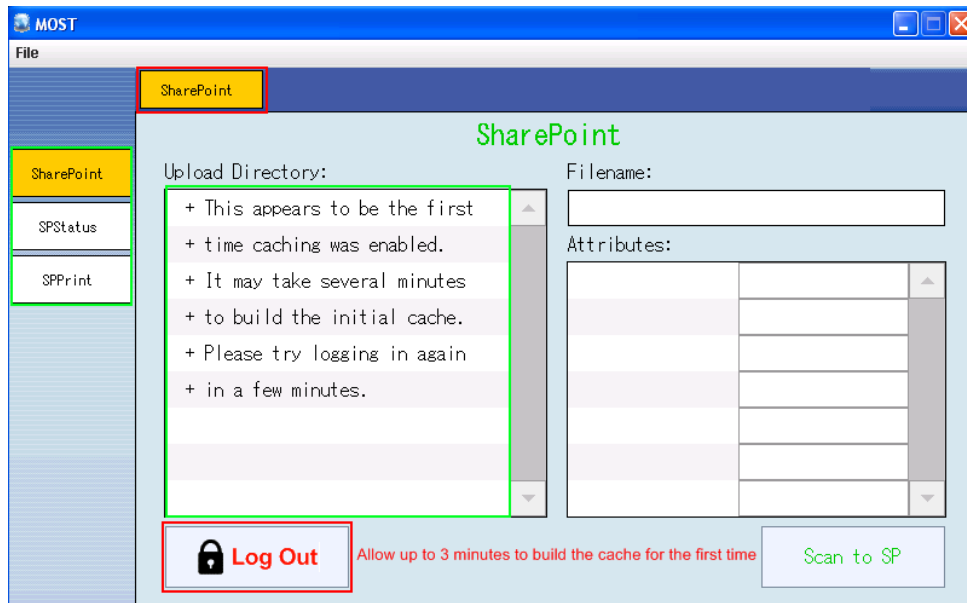
MOST SharePoint Tutorial

The emulator shows you exactly what you would see on an MFP, and it functions in the same way (SharePoint documents cannot be printed using the emulator, it requires an MFP). This same process could be tested with the same exact steps, but by installing MOST on the MFP by following the instructions in the MOST manual. (Please refer to the MOST manual on how to setup MOST in the MFP or any other MOST related issues.)

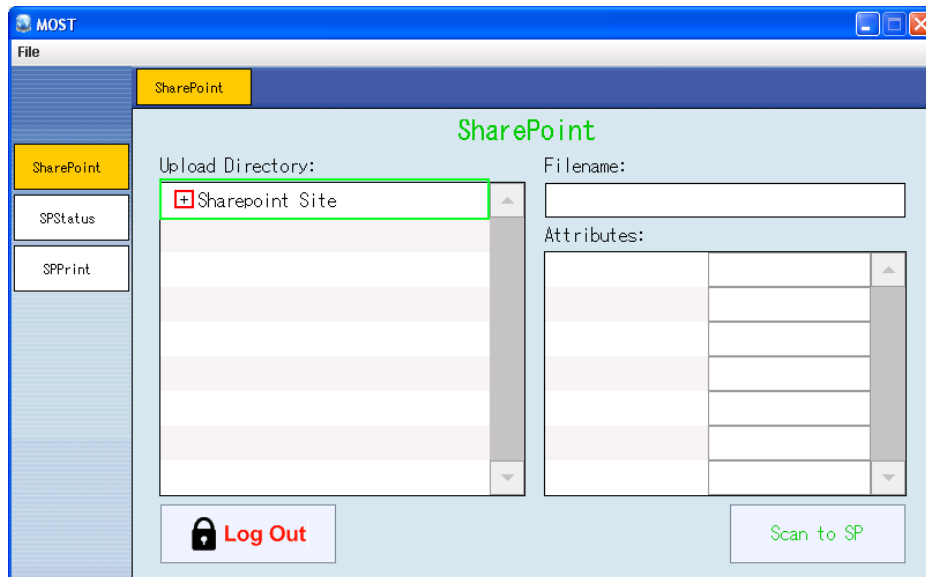
1. Login to MOST at an MFP or use MOST Desktop (**Start > Program > Reform...>MOST>Misc>MOST Desktop**) using the demo account. Username is **demo**, password is **demo**.



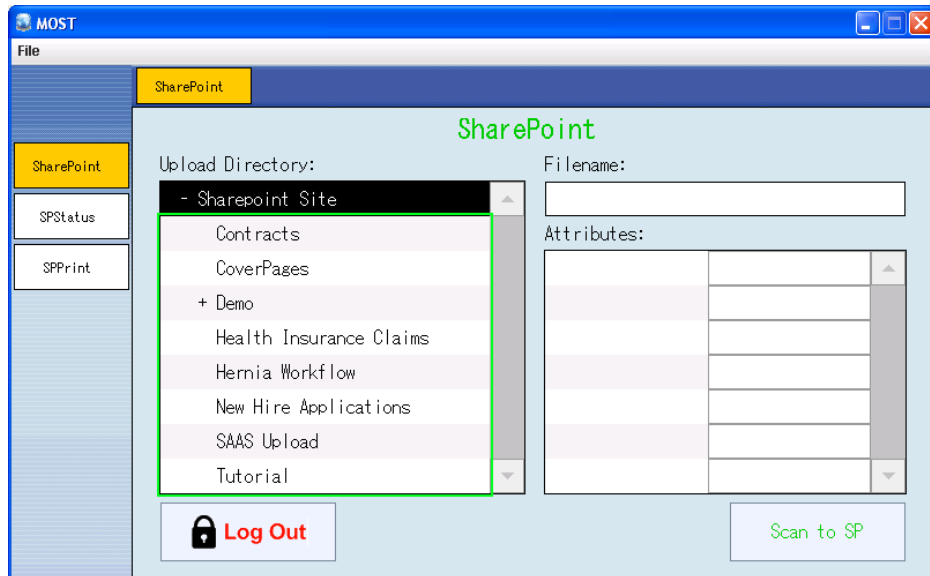
2. The emulator will now connect to the MOST server and login. It may take several seconds to log in, since MOST must connect to the SharePoint server to retrieve the account settings. If logging in for the first time, you may see a message in the upload directory. This is because your user's SharePoint list is being built for the first time. Please wait about 2 minutes and then click the **Log Out** button.



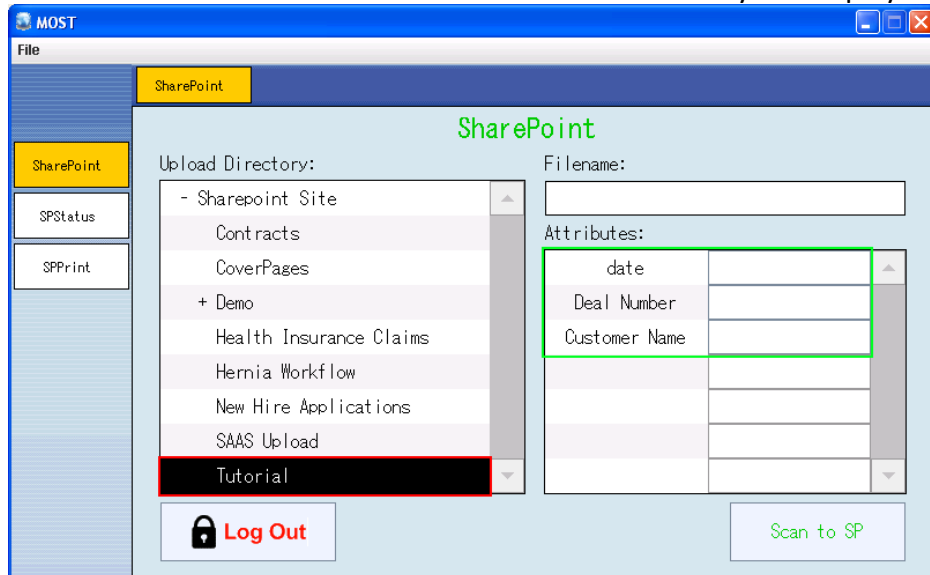
- Now log back in with the same credentials (Username=demo, Password=demo). This time when you log in you will notice that your upload directory list has been populated with available SharePoint sites. To expand a SharePoint site, click the + symbol next to its name.



- Clicking the "+" will display the available directories in the selected SharePoint Site.



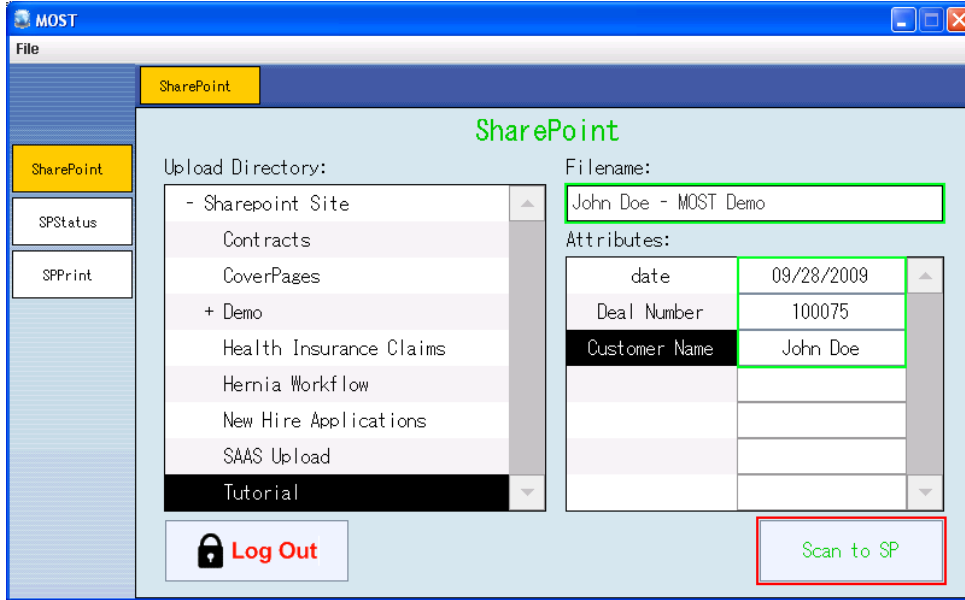
5. Select **Tutorial** from the list. After making the selection you will notice in the Attributes box the attributes associated with the directory are displayed.



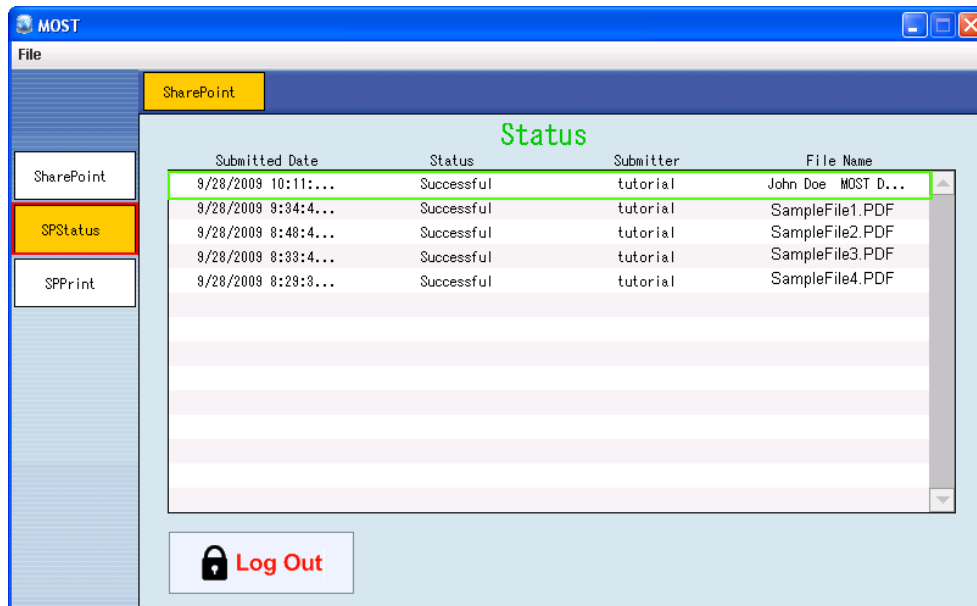
6. In the Filename field, type in a file name. Using a unique name will make it easier to locate the file using the SharePoint web interface. Ex filename: **John Doe - MOST Demo**
7. Enter today's date in the **date** field.
8. Enter **100075** in the **Deal Number** field
9. Enter your name in the **Customer Name** field.
10. After filling out all the fields, place your documents in the feeder and click on **Scan to SP**. If using MOST Desktop, it will ask you to select a file to simulate your

scan. Your scan document should be sent to SharePoint along with the attributes.

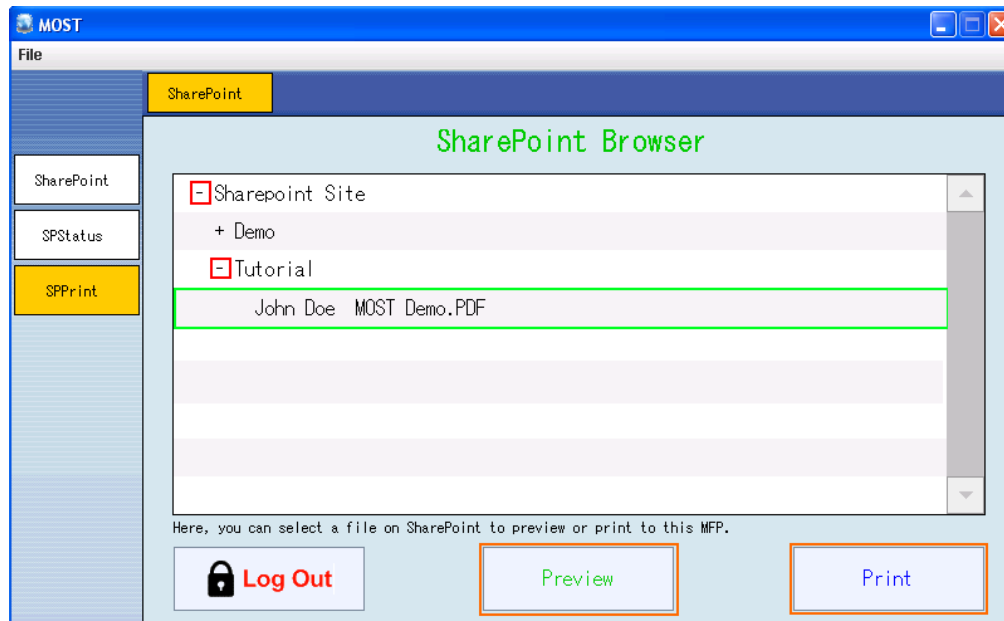
*Note – Please make sure the SharePoint service is running. Otherwise the document won't be uploaded. Please see the section **SharePoint Service** in this document for more information on how to manually start the service.



11. Click on the **SPStatus** tab to see the status of your document. It may take a few seconds to refresh the list. We have sent a couple more documents for demonstration purposes.

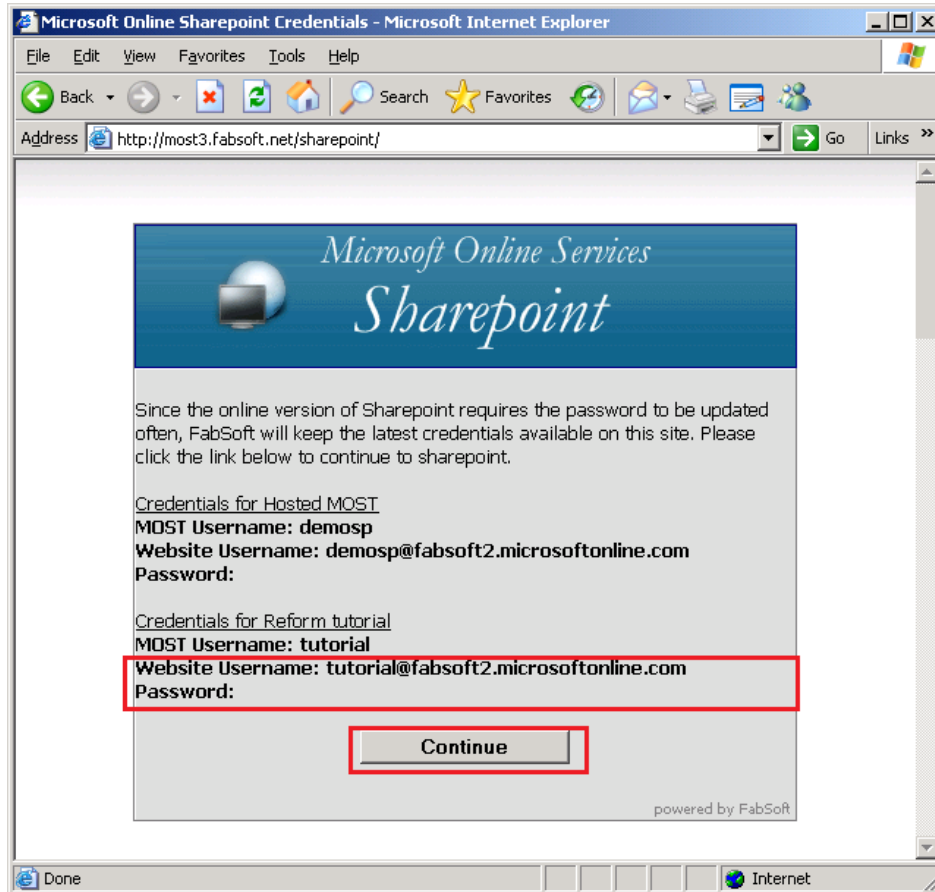


- Click on the **SPPrint** tab. If using MOST Desktop, you will only be able to **Preview** the document as an MFP is required to do the printing. In this tab, you will see the document that you just submitted. Navigate through the SharePoint site on the screen to the Tutorial directory. Select the **John Doe MOST Demo.PDF** file. Click on **Preview** to preview the document. Click on the **Print** button to print the document.

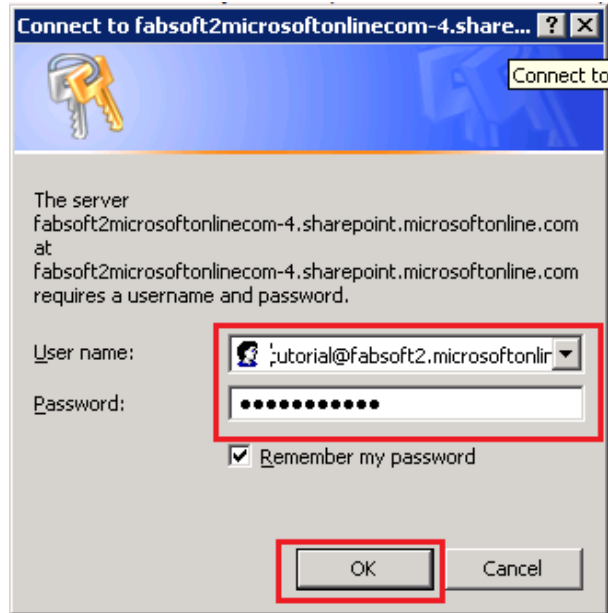


Viewing your document in FabSoft's SharePoint Demonstration Site

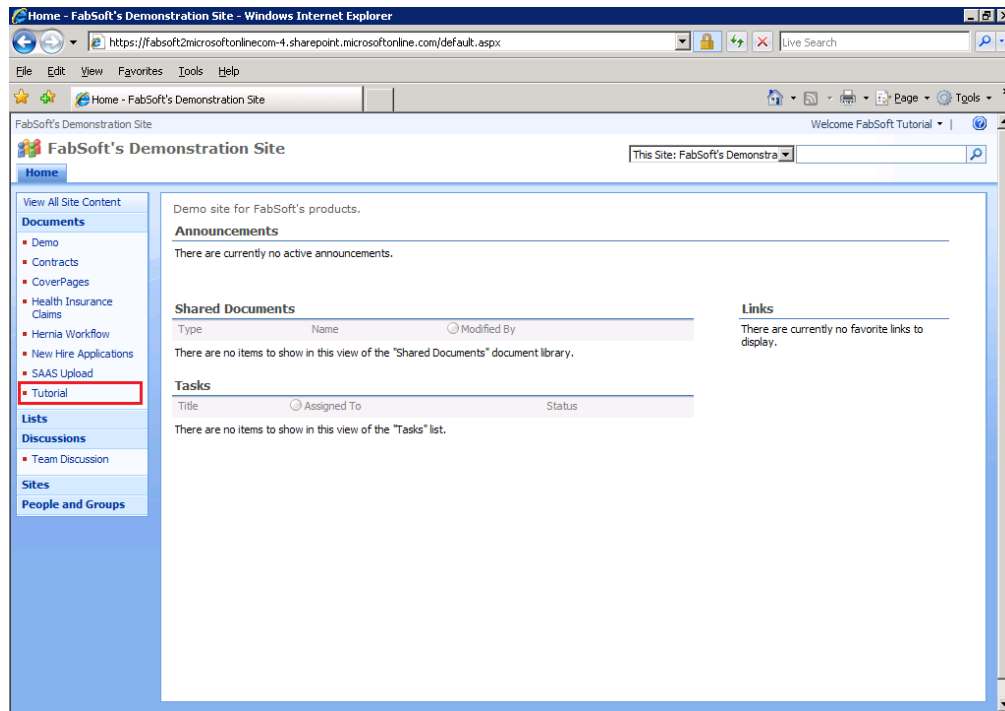
1. Open your internet browser and copy this address
<http://most3.fabsoft.net/SharePoint/>



2. You will be asked to enter the username and password on the next screen so please take note of the Username and Password. Click on **Continue**.
3. Enter the username and password from the previous screen. Click **Ok**.



4. On the left side under Documents, click on **Tutorial** to see your uploaded document.



- Documents uploaded are listed below. You can open the document and also view the attributes associated with the document.

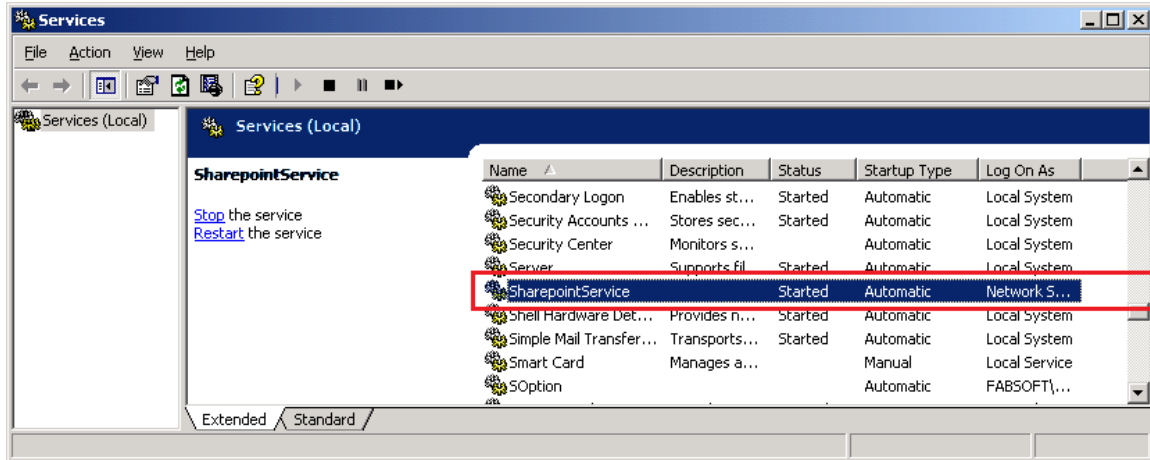
The screenshot shows a web browser window displaying a SharePoint site. The page title is 'Tutorial' and the URL is 'https://fabsoft2microsoftonlinecom-4.sharepoint.microsoft.com/Tutorial/Forms/AllItems.aspx'. The page content shows a list of documents with the following columns: Type, Name, Modified, Modified By, Date, Deal Number, and Customer Name. The list contains three items:

Type	Name	Modified	Modified By	Date	Deal Number	Customer Name
	Bobs Fish Grill	7/8/2009 8:12 AM	FabSoft Tutorial	09/15/06	01122	Bobs Fish Grill
	John Doe - MOST Demo	7/8/2009 1:49 PM	FabSoft Tutorial	07/08/09	100075	John Doe
	Jonny's Steak House	7/8/2009 8:13 AM	FabSoft Tutorial	09/15/06	01123	Jonny's Steak House

SharePoint Service

Go to **Start > Programs > Control Panel > Administrative Tools > Services**

To start the service: right click on SharePointService > Properties. Under Service status, click on Start.



This service acts as a liaison between Reform 12 and Microsoft SharePoint. It allows for Reform to upload documents and their properties to the SharePoint server. Depending on your environment, it may be required that this service is run under a local administrative account

Maintenance

There are certain directories and SQL tables that need to be monitored for growth along with the SharePoint plugin for Reform 12. As a system processes more and more jobs, the size of these directories and SQL tables can grow very quickly. Overall system performance can be affected by the large amounts of space that the files may take up. Also, there exists a 4GB database limit if using the Microsoft SQL Server Express 2005 supplied with this installation. Obsolete files/database entries should be deleted according to your needs and file retention specifications. It is recommended to monitor the following directories and SQL tables for growth:

Directories:

C:\Program Files\Reform...\Backups
 C:\Program Files\Reform...\Spooler\ImageQueue
 C:\Program Files\Reform...\Plugins\SharePoint\Uploads

SQL Tables:

SharePointTrans

Troubleshooting

Q: Nothing is happening after the form is processed. How can I determine the cause of an issue?

A: Check the Event Log for errors related to Reform or the SharePoint service. The Event Log can be access by going to Control Panel > Administrative Tools > Event Log. This will usually give you a good idea about why the MOST SharePoint plugin might be failing.

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