

12/01/2010

**Reform.12**

**SharePoint**

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## About the SharePoint Plug-in

The SharePoint plug-in acts as a bridge between Reform and SharePoint. It allows you to archive documents processed by Reform to SharePoint Document Libraries where your collection of documents can be shared.

Reform Enterprise/PDC maximizes the integration with Microsoft's SharePoint by enabling automatic delivery of document information from any operating system, application or device. Whether a document is being printed from the host, scanned in using an MFP or copier, or generated by a user from an application, Reform will capture the process, extract the text and intelligently archive it to SharePoint. With Reform's alternative input options, more of your valuable information can be effortlessly accessed and easily shared company-wide through SharePoint. Reform can control directory locations as well as custom index information to simplify document retrieval. Fast and easy access to important information is an extremely vital resource, and Reform's integration capabilities to SharePoint let you obtain the most comprehensive document information archive to improve the workflow of your business operations.

## System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- 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 SQL Server (SQL Server Express will be automatically installed by the SharePoint installer if it is not present on the current system)
- Microsoft .NET Framework 2.0 (installed automatically if not present on the current system)

All required Reform software downloads can be found at [www.fabsoft.com](http://www.fabsoft.com) >> Downloads section.

## Hardware Requirements

- Production System Recommendation (These suggestions are only estimations. High load environments may require multiple servers, or additional hardware.)
  1. Pentium 4 Processor
  2. 4 GB RAM
  3. HDD Space 100 GB (Redundancy recommended)

4. Battery Backup (UPS)
  5. Dedicated server, no other software products except for virus and security programs.
- Minimum System Requirements for demonstration purposes only
    1. Pentium 4 Processor
    2. 2 GB RAM
    3. HDD Space 30 GB

Hardware specifications depend greatly on the workload and throughput that is required. Higher end processors and greater amounts of memory will increase the amount of information and data that Reform can process thus improving overall system throughput. For load balancing or failover, multiple servers can also be used. (Note: A license for Reform and each plug-in is required for each server running the software.) Before obtaining the server that you plan on utilizing for Reform, please check the plug-ins' user manuals for System Requirements as well as they may require additional hardware. For production systems, we also recommend redundant hard drives utilizing the mirroring features of RAID (Redundant Array of Independent Disks) to minimize data loss and expedite system recovery in the event of a hardware failure. Battery backups are also suggested to maintain system uptime and reliability in case of power failures.

## Installation

To install the SharePoint Plug-in components, download and run the installer.



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 the SharePoint integration.

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.

## Plugin Registration and Licensing

When evaluating Reform 12, the plugins will also be in an evaluation mode for that period of time. Once Reform has been purchased and licensed, the required plugins must also be licensed in order to continue functioning correctly.

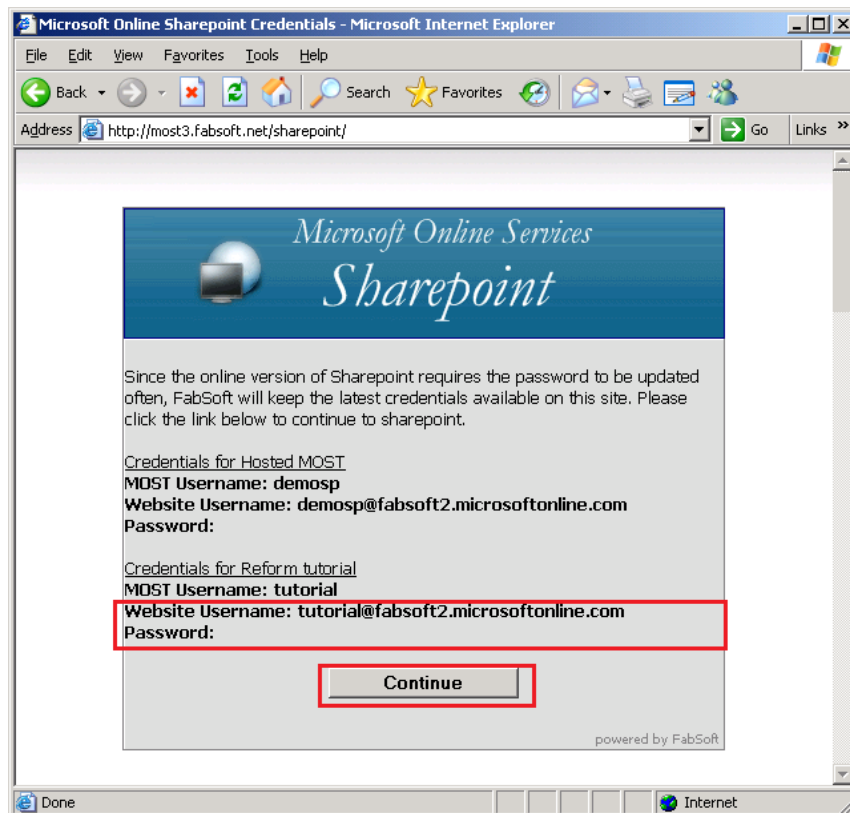
Please see the “Reform 12 Licensing and Registration” section of the Reform 12 User Manual for more information on how to license Reform 12 Plug-ins. After the license is entered, the Reform Spooler will need to be restarted to refresh the licenses. More information regarding the Reform Spooler Service can be found in the Reform 12 User Manual.

## Sending Your First Document to SharePoint

After installing the SharePoint plug-in, it is important to confirm that the SharePoint Service is running. This can be done by restarting the PC or by manually starting the service. For more information on starting it manually, please see the **Starting SharePoint Service** section at the end of this manual.

### Very Important:

To get the current username and password for Reform’s demonstration SharePoint account, go To: <http://most3.fabsoft.net/SharePoint/> (Please take note of the username and password for it will be used throughout the configuration.) The username is: **tutorial@fabsoft2.microsoftonline.com** , since the password is updated regularly it will need to be retrieved from this website.



First, the Reform Designer must be started. To open it, go to **Start>Programs>Reform...>Designer**.

1. For the example, we will be creating a new form with an existing template. Go to **File > New > New**. Select the **SHAREPOINT.FTM** and click **OK**.

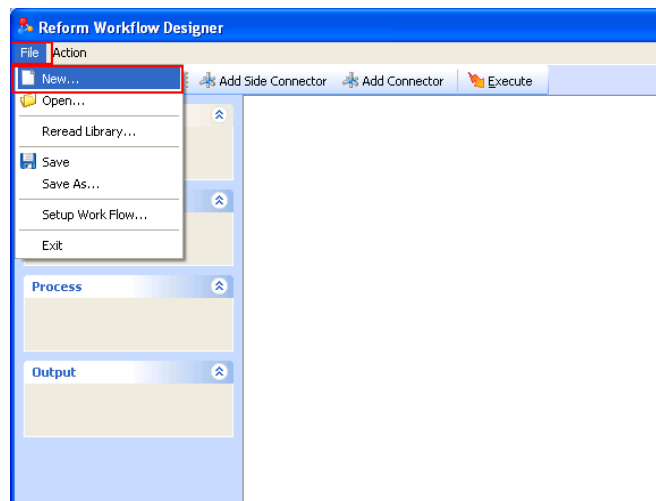


SHAREPOINT.FTM  
SharePoint Sample - Packing Slip

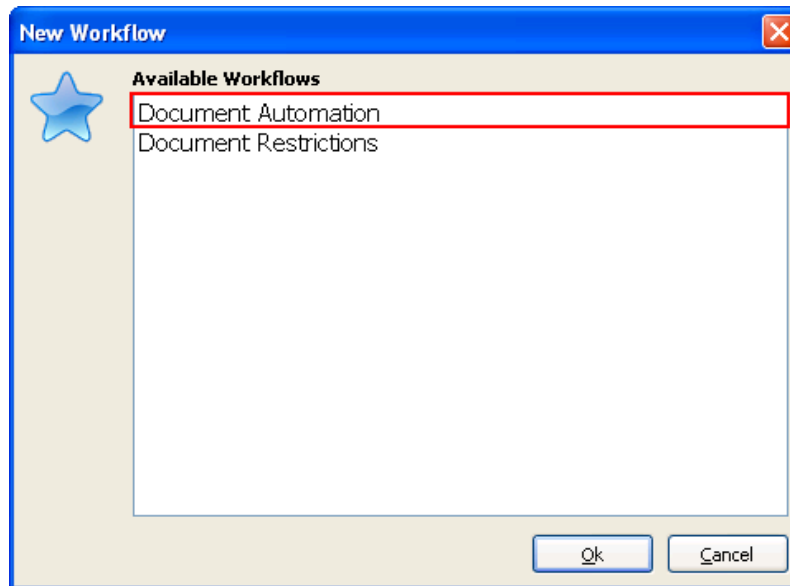
2. When it asks if you would like to open a text file for designing, select **No**.
3. Next, go to **File>Save** to save your form. Name it **SharePointPackingSlip.FOM**
4. You can now close the Reform Designer since we have our form which we will be using alongside the Workflow Designer to route the document.

\*Now that we have our form, we can begin to create the desired SharePoint workflow using the Workflow Designer. First, the Workflow Designer must be started.

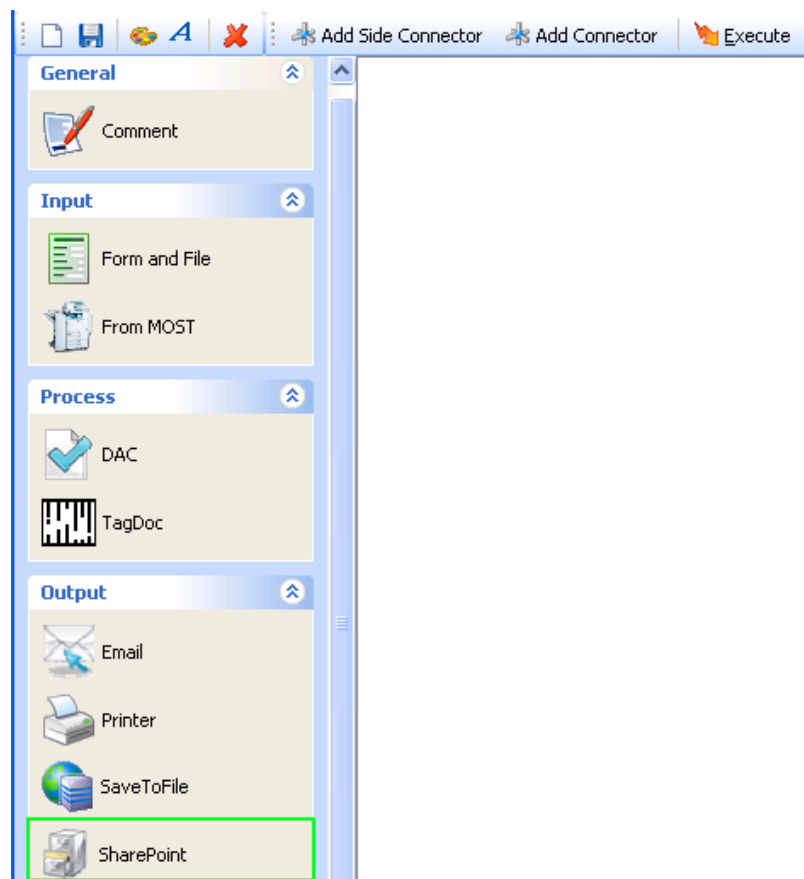
5. To open it, go to **Start>Programs>Reform...>Workflow Designer**.
6. Once open, we must go to **File > New...**



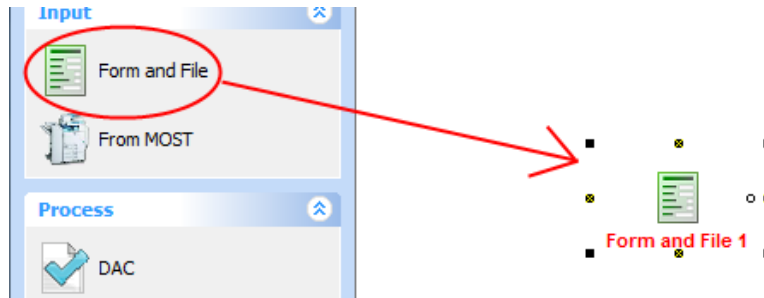
7. Select **“Document Automation”** and click **Ok**.



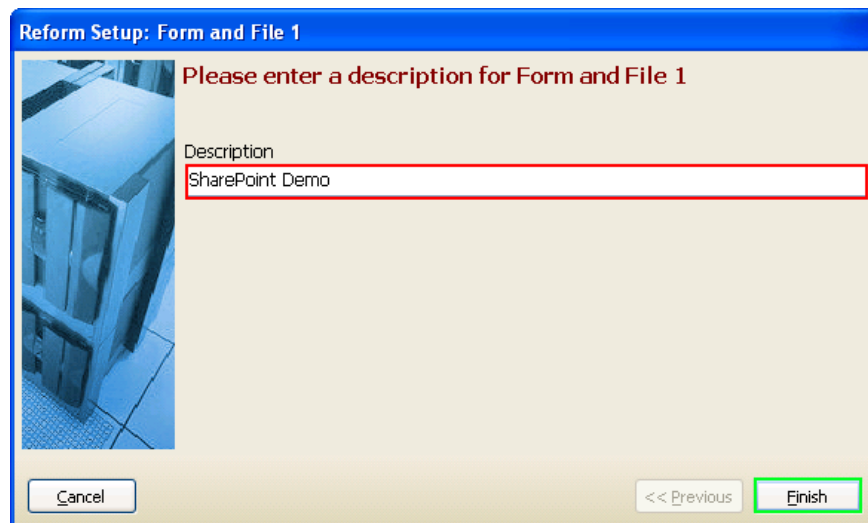
8. You will now notice that your Inputs, Processes and Outputs have been populated by the various plugins you have installed (SharePoint being one of the Outputs)



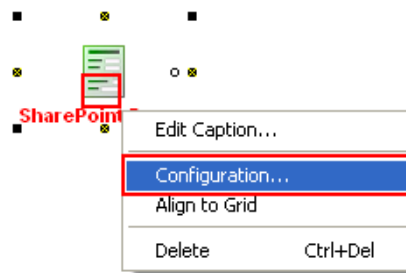
- Once opened, we can start adding the necessary components to the workflow. First, drag and drop a **Form and File** object onto the workflow by clicking and holding your mouse on **Form and File** and then moving your mouse over to the workflow and releasing the mouse button.



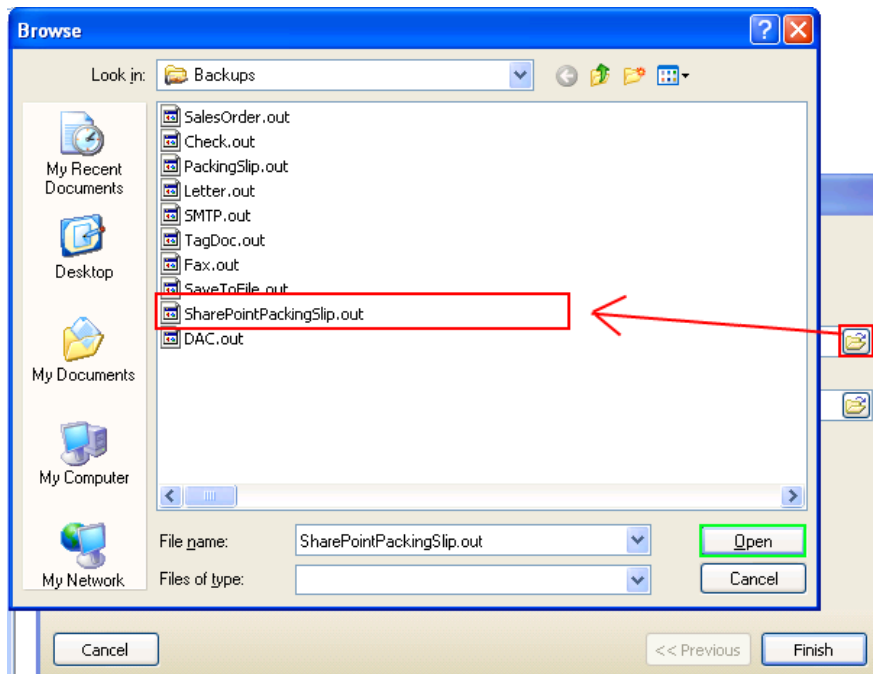
\*You will be prompted with the following dialog:



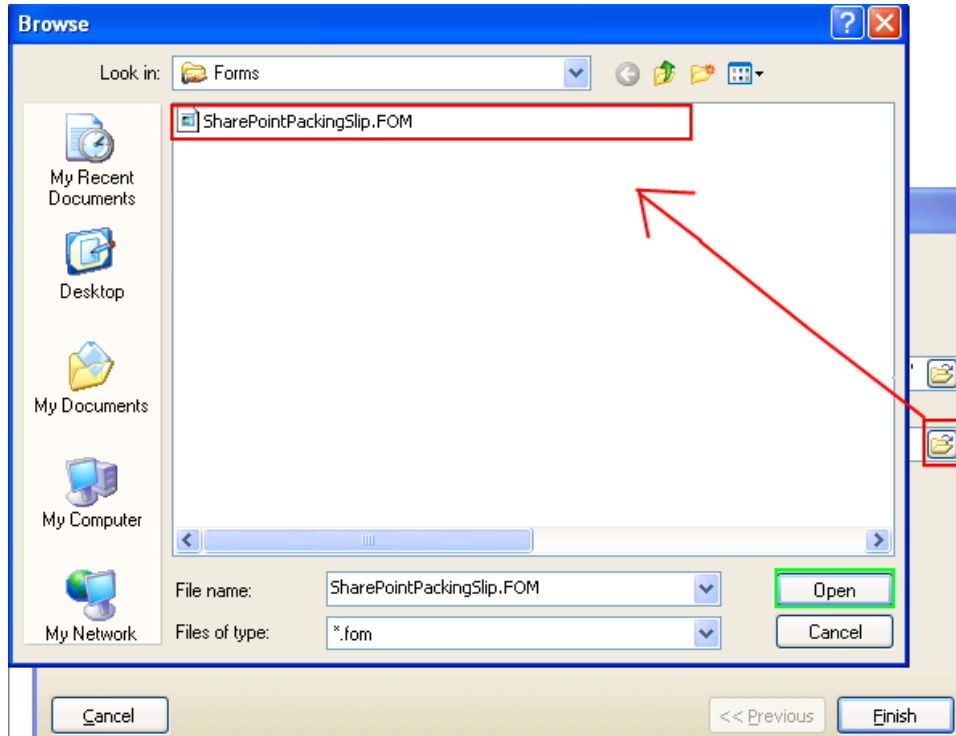
- Enter a description for the object you just added. This is done by typing in the provided box. Type **“SharePoint Demo”** and click **Finish**. This will take you back to your workflow.
- Now we are ready to configure the **“SharePoint Demo”** form and input file. To do so, right click on the newly added object and select **“Configuration...”** or simply **double-click** on it.



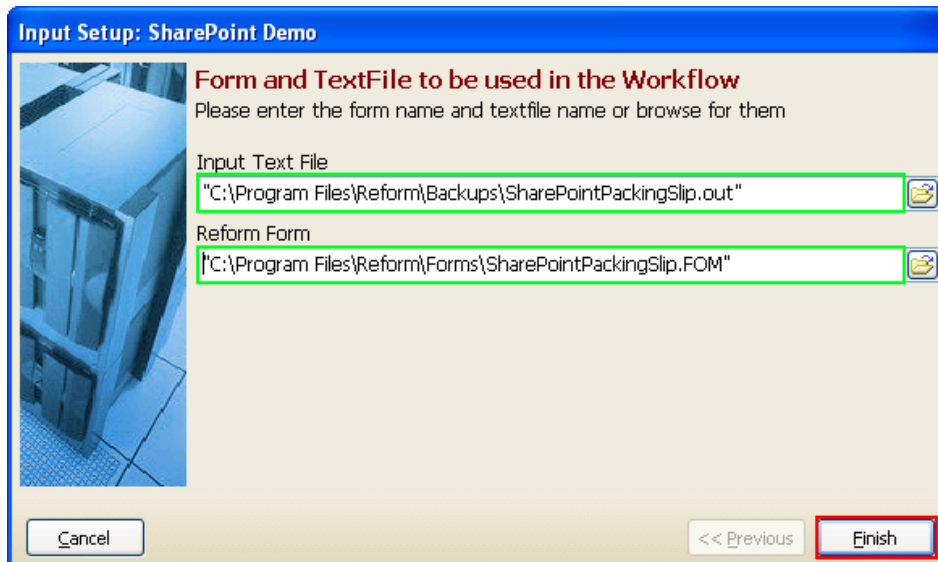
12. You are now presented with the Input Setup window. First, we want to select the TextFile or data stream that our form will be using. To do so, you can simply begin typing in the box, or you can browse to find it. We want to select the **SharePointPackingSlip.out** file. Click the small folder icon to bring up a window which will let us choose that file. Select the file and click **Open**.



13. After choosing the text file, you are taken back to the Input Setup page so that you can now select a form. Click the small folder icon to bring up a window which will let us choose the desired **SharePointPackingSlip.FOM** form file. Select the FOM file and click **Open**.

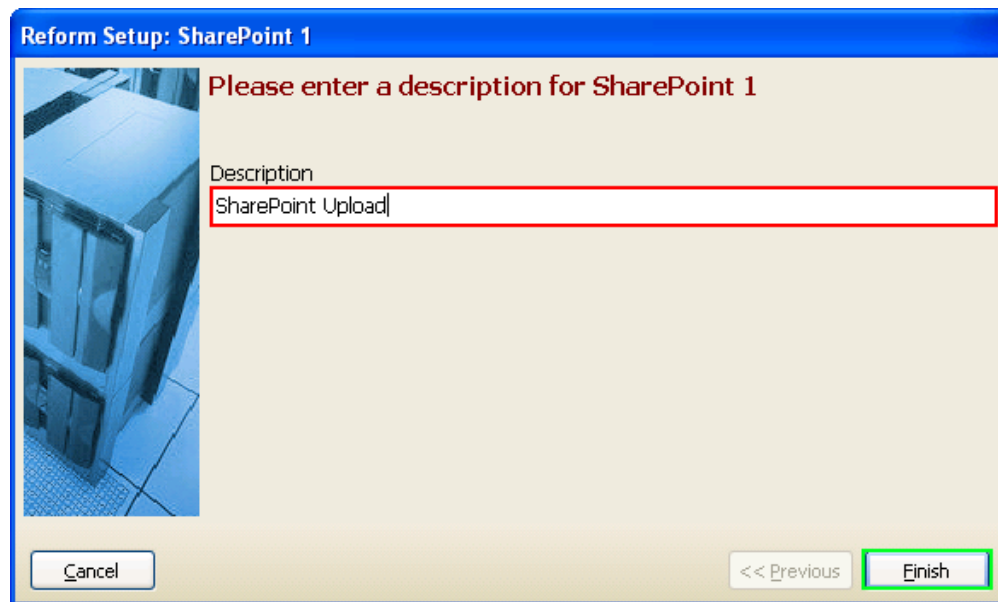


14. Now that you have both your Input Text File and Reform Form selected, the setup of Form and File is complete. You can quickly double check that the correct files are selected and then click **Finish**.



15. You will also be prompted to add a page-break field to the forms. At this point, we want to select **No**.

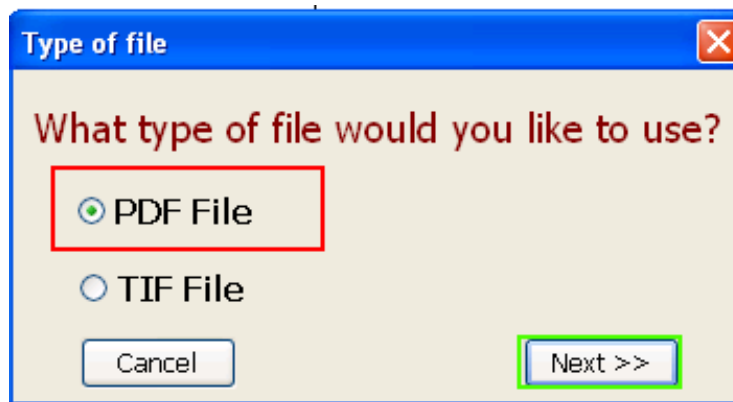
16. To finish the SharePoint workflow, we want to add a **SharePoint** Output. We use the same drag and drop procedure as with the “**Form and File**” (see step 9). Take your mouse and drag the “**SharePoint**” object from under Output onto the workflow somewhere below your Input. Once you release your mouse, you will be prompted to describe “**SharePoint**”. Type “**SharePoint Upload**” in the box and then click **Finish**.



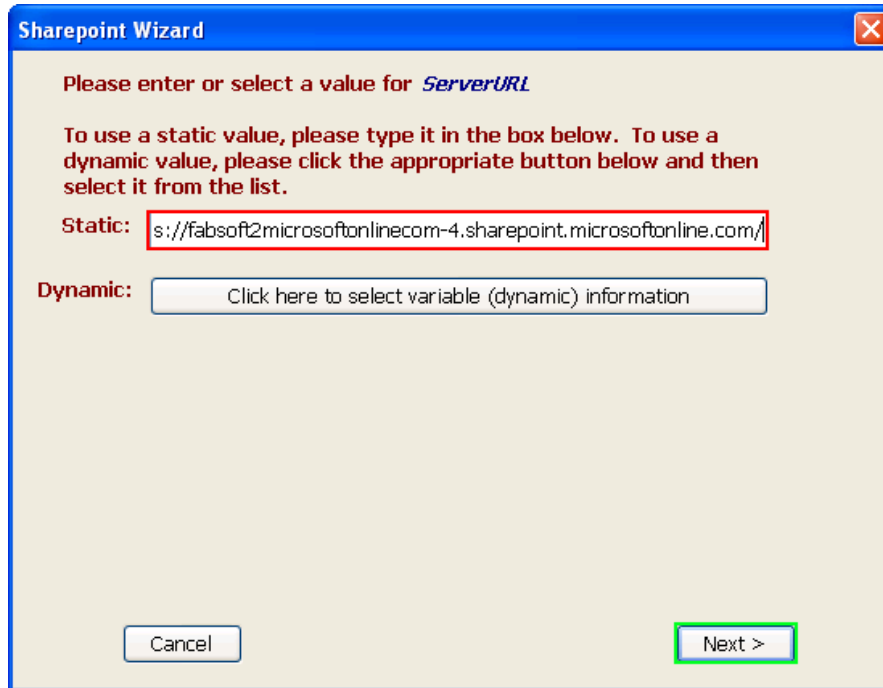
17. Once you click Finish, you are taken back to your workflow. Your **SharePoint** will have a **Red** Caption because it is not yet configured. To configure **SharePoint**, you must first connect the Form and File object titled “**SharePoint Demo**”. To do so, first select the “**Add Connector**” button from the menu bar. Next, drag your mouse from the small “**x**” underneath “**SharePoint Demo**” to the small “**x**” above “**SharePoint Upload**” as pictured below. When the connection is complete, the connector will turn black (if red, connection has not been made correctly, try again) and the “**SharePoint Demo**” caption will turn **green**.



18. You will be prompted to configure **SharePoint** upon completing the connection. Click **Yes**. If you clicked No, you can **double click** on the SharePoint object or **rightclick** and select “**Configuration...**” to begin the setup. This configuration will step you through all the settings necessary for **SharePoint** to successfully connect to a SharePoint server and upload files. The first piece of information is the file type you want your document to be archived with into SharePoint. Select “**PDF File**” and click **Next**.



19. To use the Reform demonstration SharePoint account, copy/paste or type in the following for the **ServerURL**:  
**<https://fabsoft2microsoftonlinecom-4.SharePoint.microsoftonline.com/>**



Sharepoint Wizard

Please enter or select a value for *ServerURL*

To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.

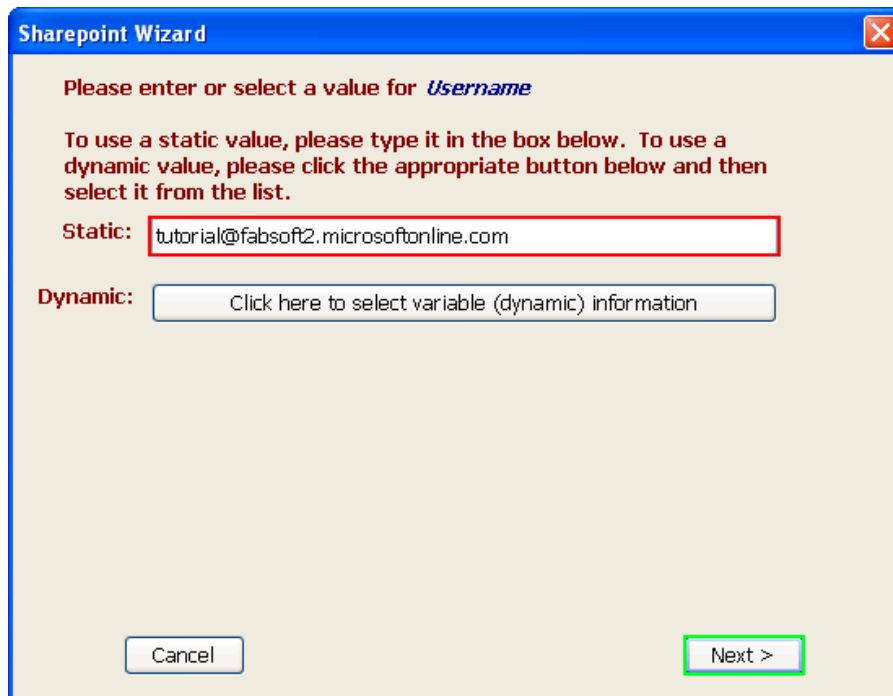
Static:

Dynamic:

20. Enter the Username. Click **Next**.

The username is: **tutorial@fabsoft2.microsoftonline.com** , since the password is updated regularly it will need to be retrieved from our website. (Refer to this site to get the current credentials for Reform Tutorial:

<http://most3.fabsoft.net/SharePoint/>)



Sharepoint Wizard

Please enter or select a value for *Username*

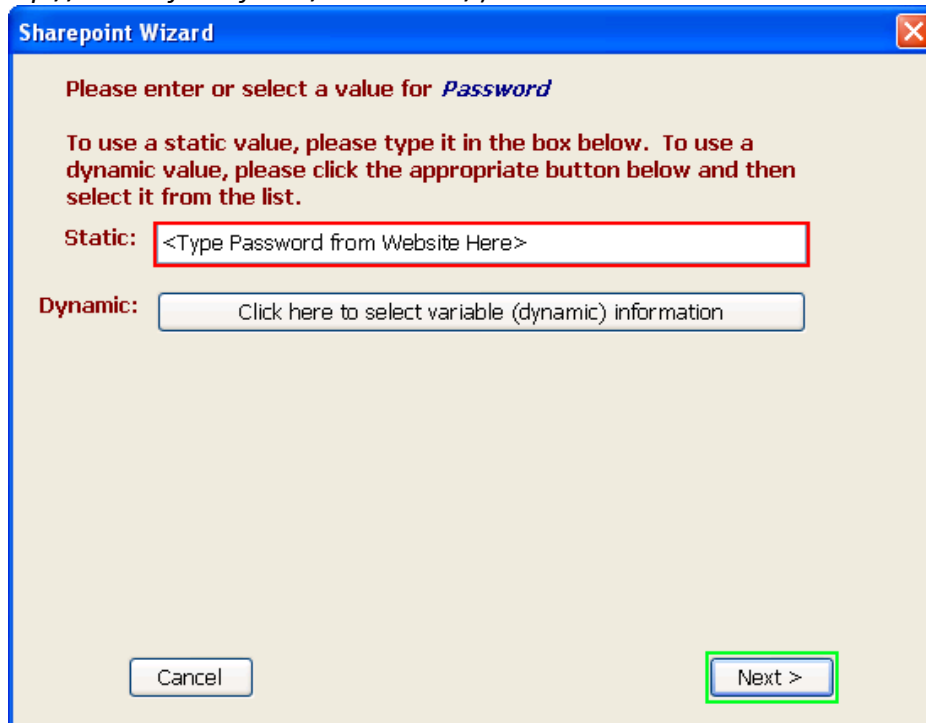
To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.

Static:

Dynamic:

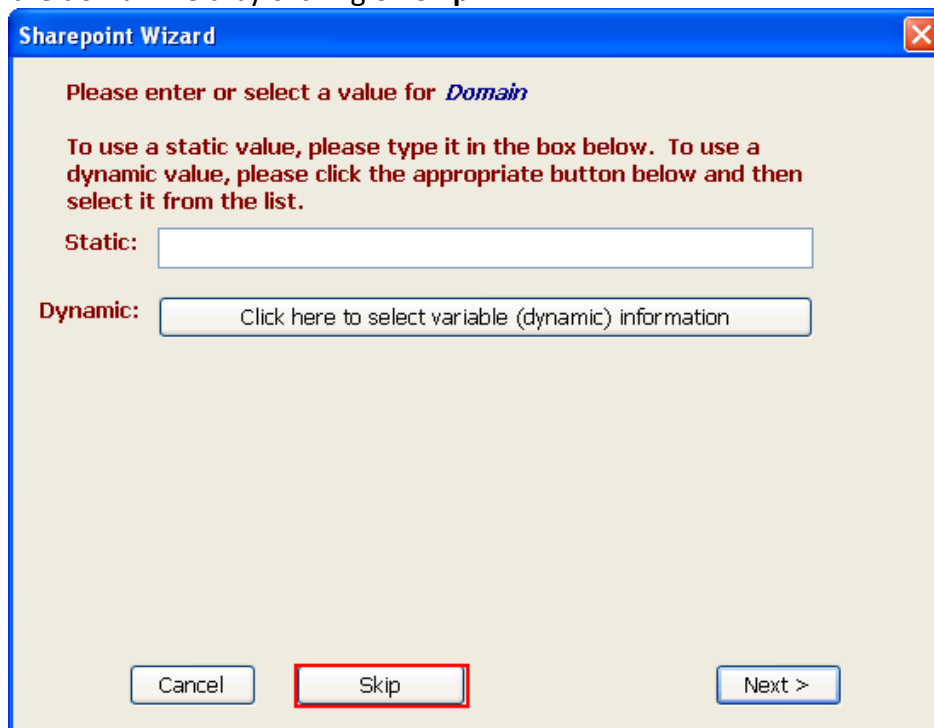
21. Type in the password and click on **Next**.

(Refer to this site to get the current credentials for Reform Tutorial <http://most3.fabsoft.net/SharePoint/>)



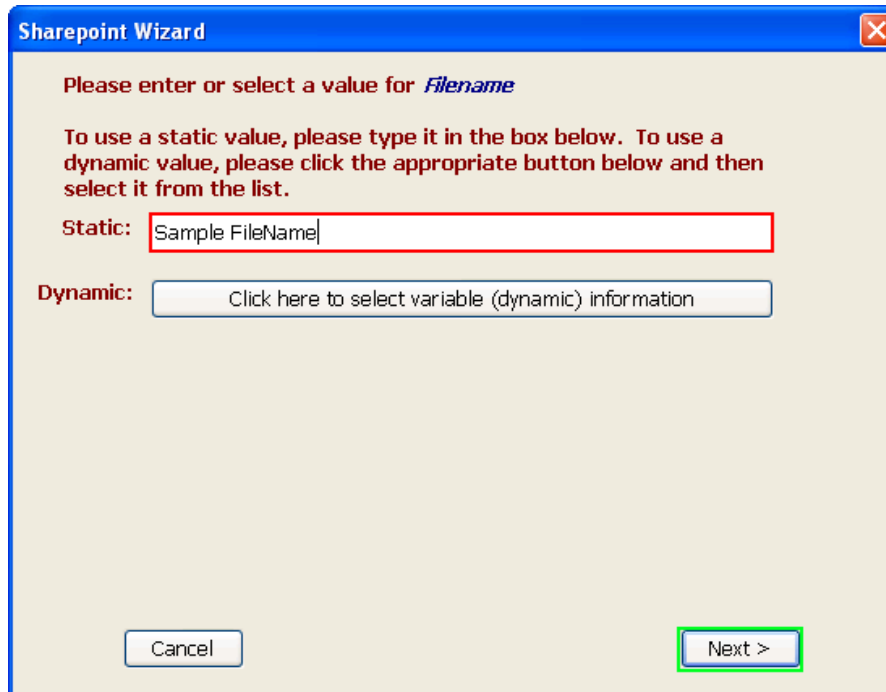
The screenshot shows the 'Sharepoint Wizard' dialog box with the title bar. The main text reads: 'Please enter or select a value for *Password*'. Below this, it says: 'To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.' There are two options: 'Static:' with a text box containing '<Type Password from Website Here>' and 'Dynamic:' with a button that says 'Click here to select variable (dynamic) information'. At the bottom, there are 'Cancel' and 'Next >' buttons. The 'Next >' button is highlighted with a green border.

22. Skip the domain field by clicking on **Skip**.



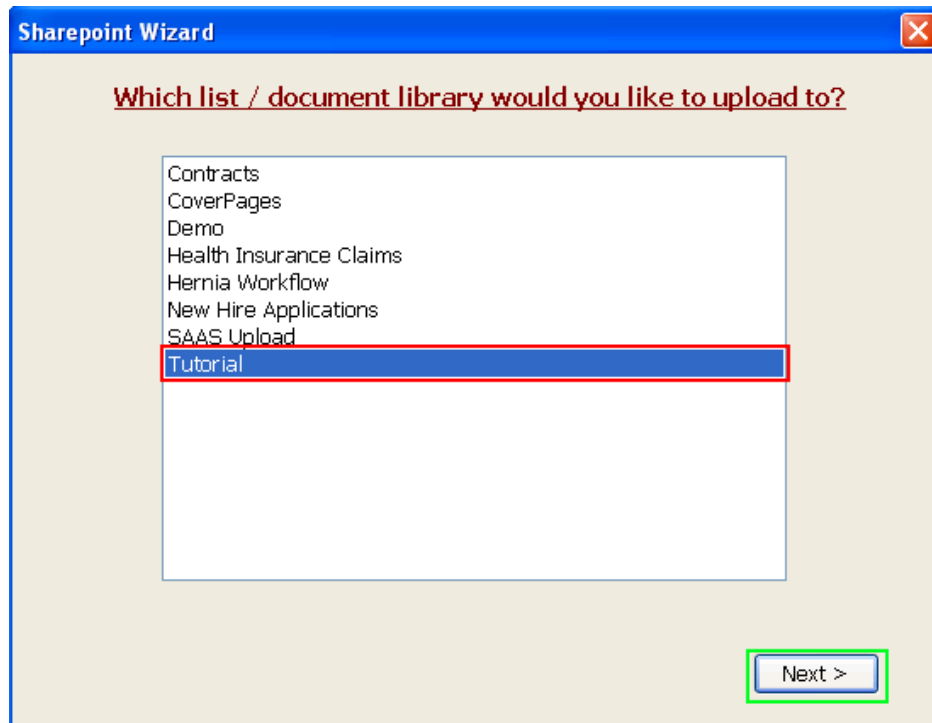
The screenshot shows the 'Sharepoint Wizard' dialog box with the title bar. The main text reads: 'Please enter or select a value for *Domain*'. Below this, it says: 'To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.' There are two options: 'Static:' with an empty text box and 'Dynamic:' with a button that says 'Click here to select variable (dynamic) information'. At the bottom, there are 'Cancel', 'Skip', and 'Next >' buttons. The 'Skip' button is highlighted with a red border.

23. You might need to wait a few minutes while it's loading the SharePoint properties. If you entered any incorrect information, close any dialogs that may come up and try the configuration again. When the wizard window appears, type in a **Filename**. Using a unique file name will help you find the file easier later. Click **Next**.

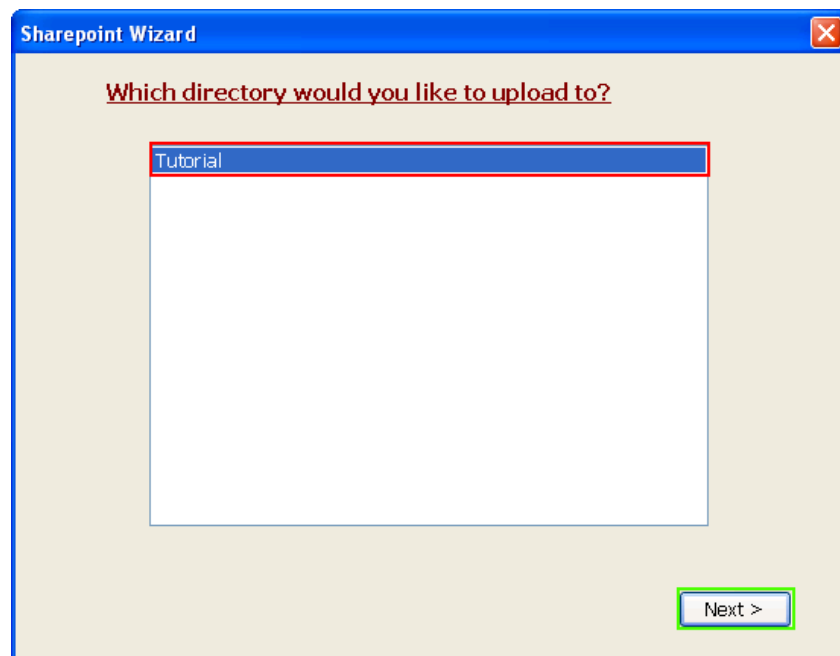


The screenshot shows a dialog box titled "Sharepoint Wizard" with a close button in the top right corner. The main text reads: "Please enter or select a value for *Filename*". Below this, instructions state: "To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list." There are two options: "Static:" followed by a text input field containing "Sample FileName", and "Dynamic:" followed by a button labeled "Click here to select variable (dynamic) information". At the bottom, there are "Cancel" and "Next >" buttons.

24. Select **Tutorial** for the **Document Library** where you would like to upload your document. Click **Next**. *Note: If you are using a different SharePoint server than the one described in this tutorial, you may see different libraries available.*

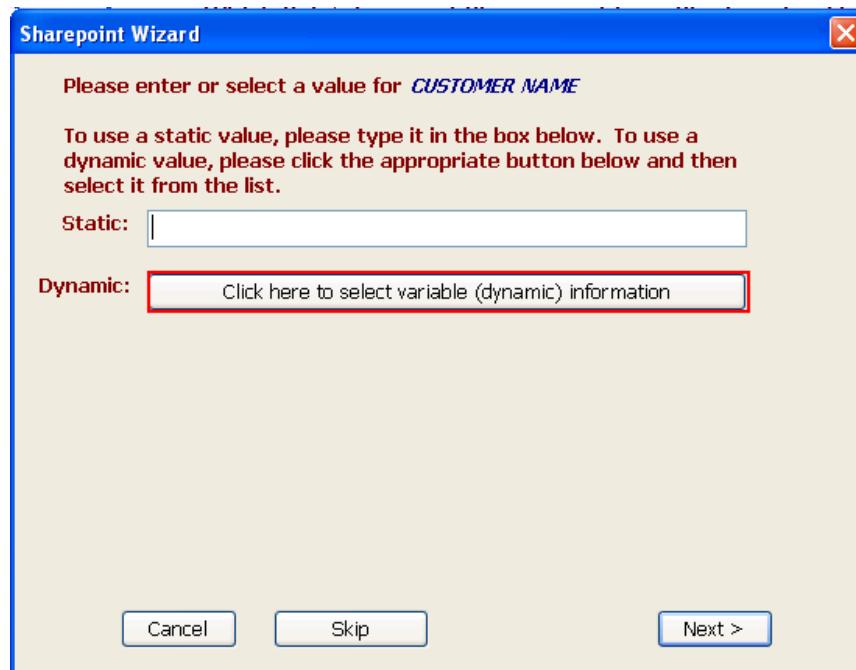


25. Select **Tutorial** for the **directory** and click **Next**.



26. The following screen asks for the **CUSTOMER NAME** that the upload will be archived under. Here we would like to use data that is available in the data stream instead of a static value. To do so, we first must click the **“Click here to select**

**variable information**” button. *Note: The attributes available for configuration are based on the directory selected. If you select a different document library or folder, you may see different attributes than the ones listed in the next few steps of this manual.*



Sharepoint Wizard

Please enter or select a value for *CUSTOMER NAME*

To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.

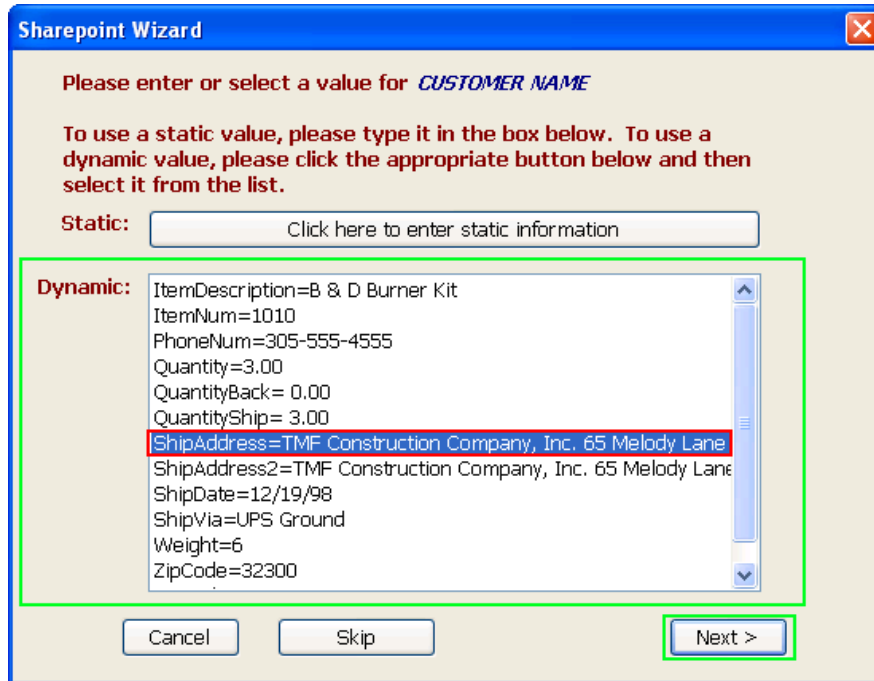
Static:

Dynamic:

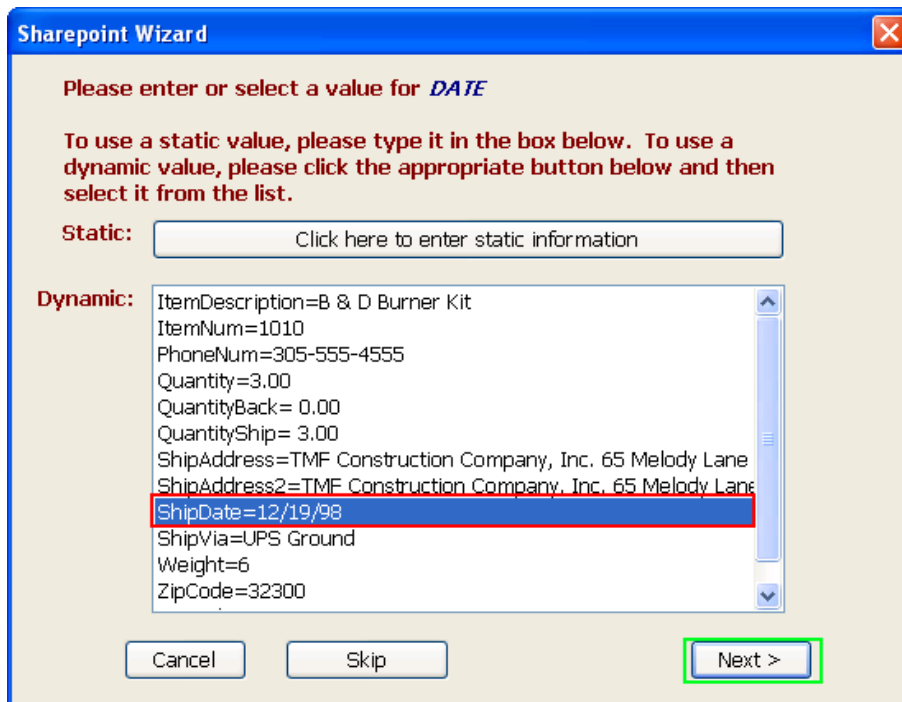
Cancel Skip Next >

\*Note-After doing so, we see that a list will appear with the different fields that you can choose for your variable data. We will be selecting from this list, but if you needed to still type static data, you can do so by clicking the appropriate button for static information and then typing it in.

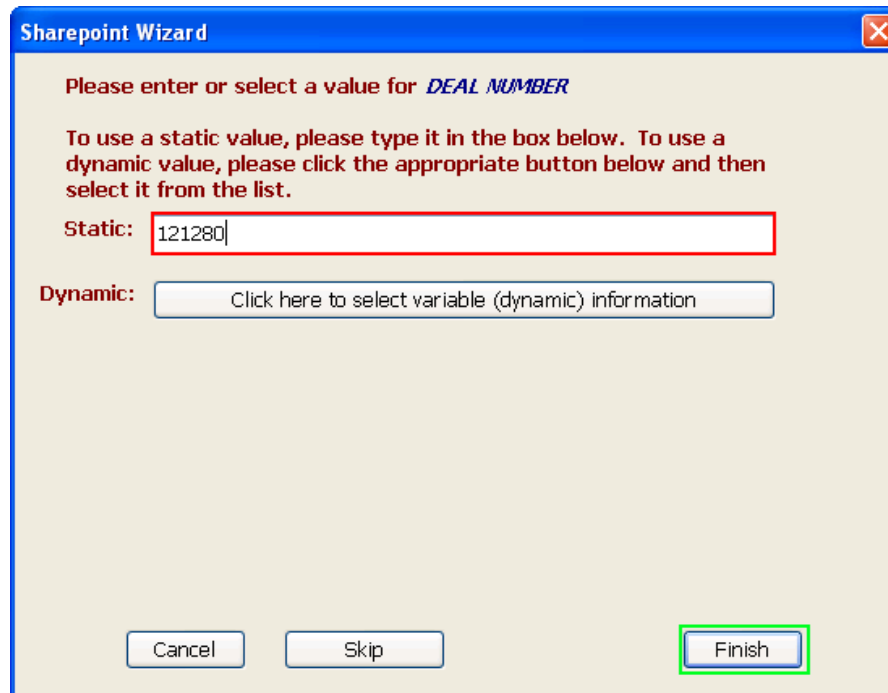
27. Now we want to use **ShipAddress** as our “**CUSTOMER NAME**” value. Select **ShipAddress** from the list and click **Next**



28. For “DATE”, we would like to again use variable data from the print stream. To do so, first click the button “Click here to select variable data”. From the list that appears, select **ShipDate** and click **Next**.

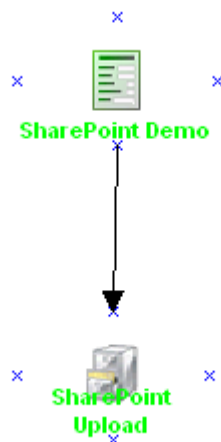


29. Type in **121280** for the **Deal Number** and click **Finish**.

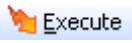


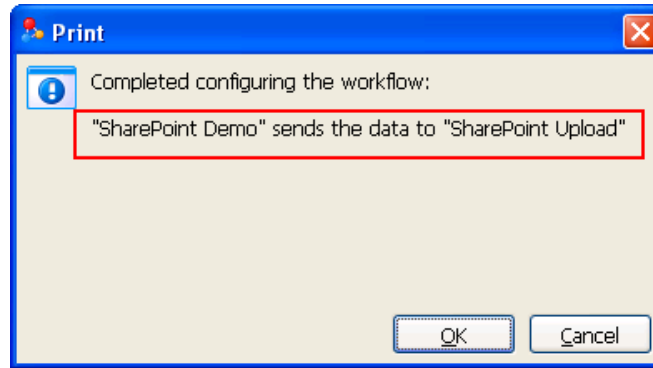
The image shows a 'Sharepoint Wizard' dialog box with a blue title bar and a close button. The main text reads: 'Please enter or select a value for DEAL NUMBER'. Below this, it says: 'To use a static value, please type it in the box below. To use a dynamic value, please click the appropriate button below and then select it from the list.' There are two input options: 'Static:' with a text box containing '121280', and 'Dynamic:' with a button that says 'Click here to select variable (dynamic) information'. At the bottom, there are three buttons: 'Cancel', 'Skip', and 'Finish'. The 'Finish' button is highlighted with a green border.

30. You have completing configuring your simple SharePoint workflow. Your 2 objects (“SharePoint Demo” and “SharePoint Upload”) should all be green meaning they have been successfully configured and the workflow is ready to be created.



31. To make all the appropriate forms and changes, the workflow must be executed.

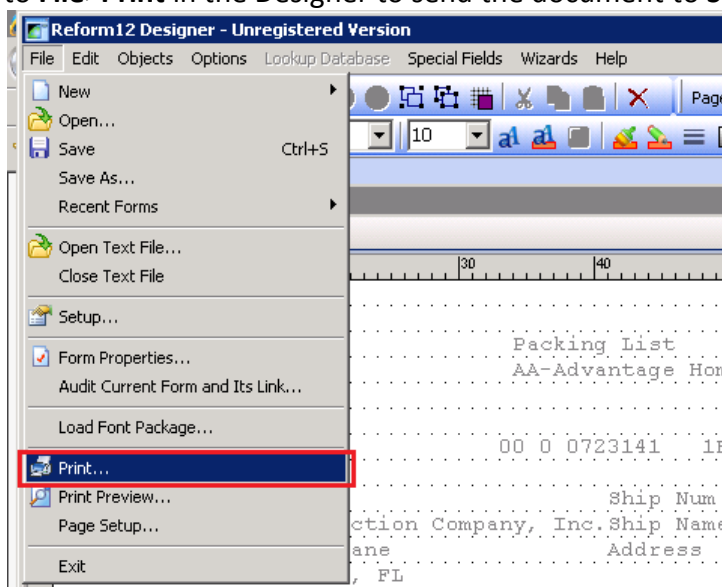
This is done by clicking the “Execute” button  on the menu bar. After execution, you will be notified about what has taken place. Click **OK**.



32. You can now close the Workflow Designer. Your form has been saved in your default forms directory. A backup of your original **SharePointPackingSlip.FOM** file has been copied to the **"Workflow Designer Original Forms"** folder in your forms directory. **Any permanent form changes should be made to this original form as it is used throughout the form configuration process as a template. If changes are made to this template, you will have to execute your workflow again to see the changes in the forms.**

33. To test out your settings and make sure that files can be uploaded, first we should open the form with the Reform Designer. Navigate to your Forms directory and double click on **SharePointPackingSlip.FOM**. When asked to open the associated TextFile, click **Yes**. Verify that the special fields exist on the right hand side of your form.

34. Go to **File>Print** in the Designer to send the document to SharePoint.

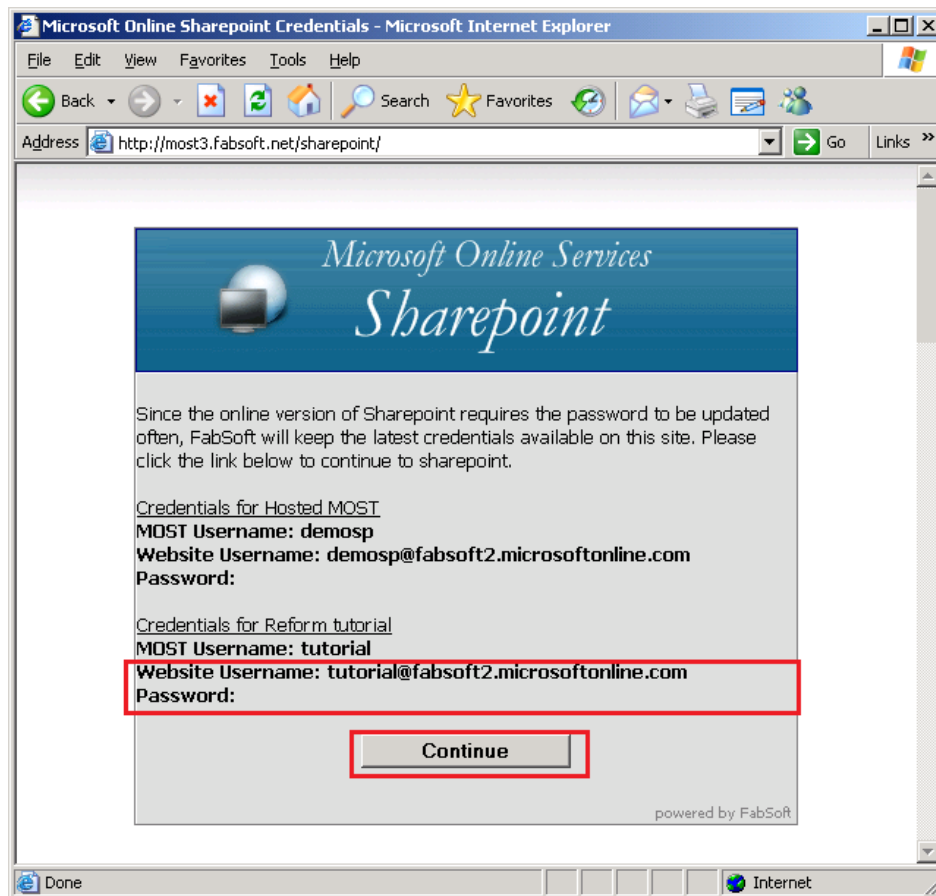


Note: make sure that SharePoint Service is running. For more information please see the **Starting SharePoint Service** section at the end of this document to start it manually.

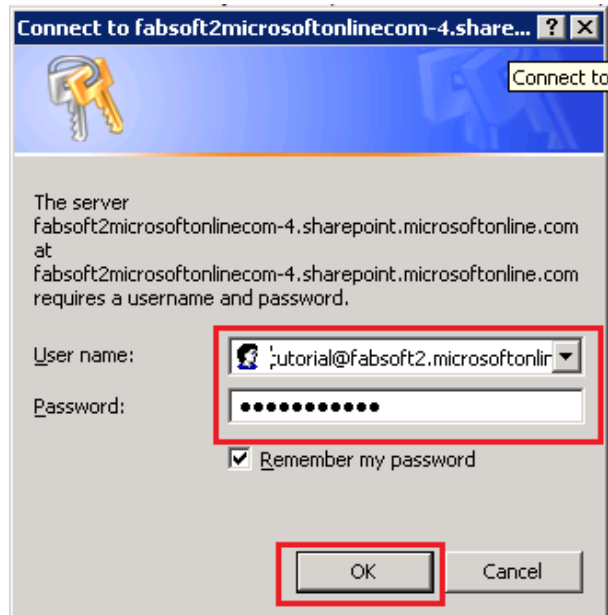
## Viewing your document in FabSoft's SharePoint Demonstration Site

1. Open your internet browser and copy this address

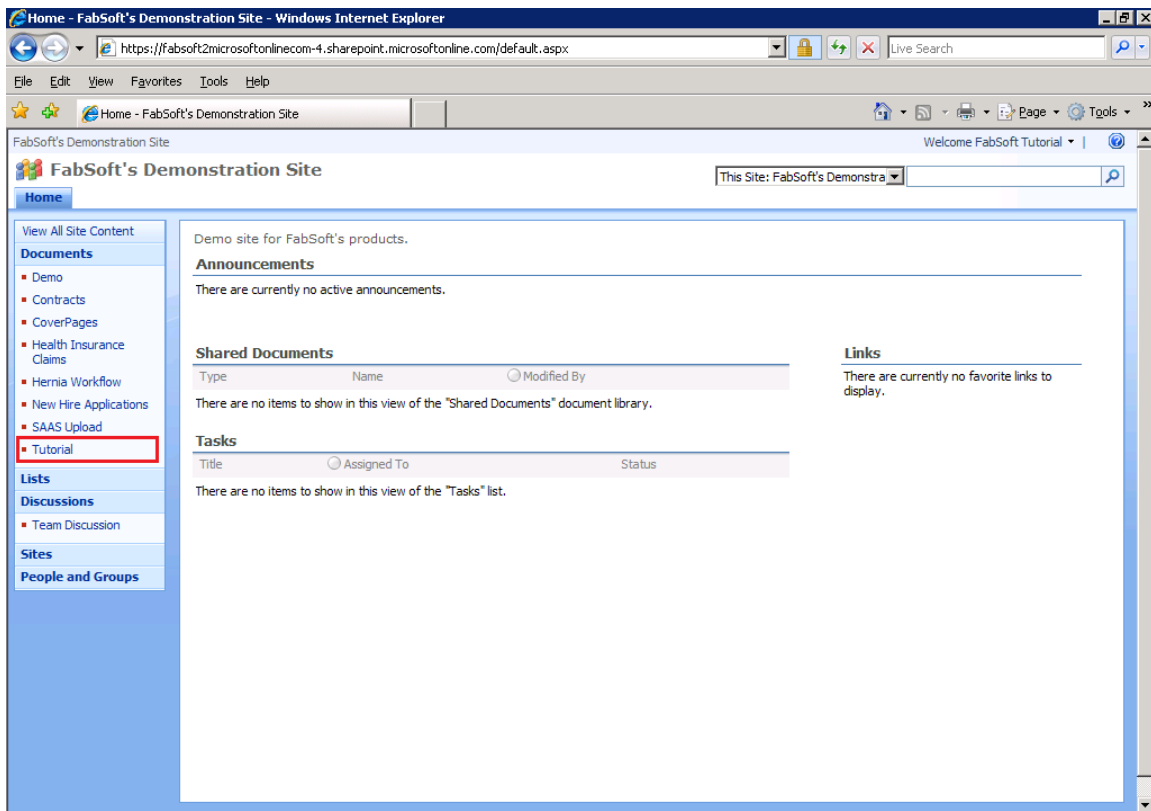
<http://most3.fabsoft.net/SharePoint/>



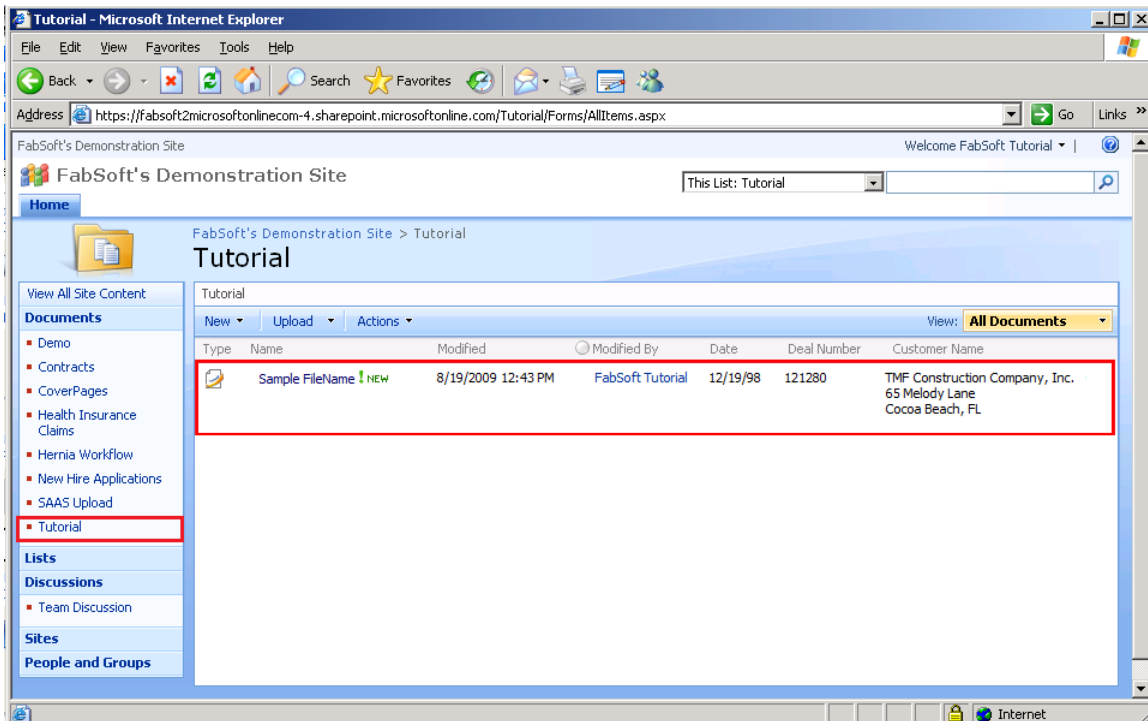
2. You will be asked to enter the username and password on the next screen so please take note of the Username and Password. Click on **Continue**.
3. Enter the username and password from the previous screen. Click **Ok**.



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



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



## 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

