Perceptive Interact for Salesforce Enterprise

Installation and Setup Guide

Version: 2.x.x

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Date: September 2016

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What is Perceptive Interact for Salesforce Enterprise?

Salesforce is an online, web-based Customer Relationship Management (CRM) application that helps you streamline and automate your business processes. Perceptive Interact for Salesforce Enterprise offers you a web-based solution by combining Perceptive Content capabilities with the Salesforce portal. This solution enables you to manage documents within Salesforce through Interact viewer and perform many of the key tasks that you can perform in the system, such as view, capture and download a document.

Required components

This section provides information about prerequisites and licensing.

Prerequisites

If you are using Summer 15 version of Salesforce, in the **Clickjack Protection** section, the **Enable clickjack protection for customer Visualforce pages with headers disabled** check box is available. To view Interact for Salesforce, ensure that you do not select the **Enable clickjack protection for customer Visualforce pages with headers disabled** check box in the **Clickjack Protection** section.

You must have access to the following services before you download the Perceptive Interact package.

- Your organization profile in Salesforce.com with system administrator or equivalent privilege.
- Browser requirement for Interact is IE 10 or higher. Interact also supports the latest version of Chrome, Firefox and other leading browsers.

Before you set up Interact Salesforce Enterprise Viewer, you must have the following software installed on the server machine.

- Apache Tomcat, version 7 or higher
- ImageNow Server, version 6.7 or Perceptive Content version, 7.0 or higher

  Note For information on installing Perceptive Content server, refer to the *Perceptive Content Server Installation and Setup Guide* for your environment.

- Perceptive Integration Server, same version as Perceptive Content Server

  Note For information on installing Perceptive Integration Server, refer to the *Perceptive Integration Server Installation and Setup Guide*.

Licenses

This procedure requires the following Perceptive licenses.

- Perceptive Interact Enterprise package for Salesforce
- Interact viewer
- Integration Server
- Perceptive Content, version 7.0 and higher or ImageNow version 6.7

Install Interact viewer

To install Interact viewer, complete the following steps.

1. Install Perceptive Integration Server.

   Note To install the integration server, refer to the *Perceptive Integration Server Installation and Setup Guide*.

2. Download the required files from the Customer Portal.
3. Unzip **SalesforceApp <*version number*>.zip** file.
4. Copy the files to the relevant directories.
5. Configure Tomcat for non-Single sign-on (SSO) Enterprise.
6. Restart Tomcat.

Download the required files

To obtain the required files, complete the following steps.

1. Go to www.perceptivesoftware.com and log in to the Customer Portal.
2. In the **Product Downloads** page, search for all downloadable items for Interact Salesforce Viewer, version 2.1.
3. Download the **SalesforceApp <*version number*>.zip** file to a temporary directory on your computer where you have installed Apache Tomcat.

Extract the zip file

Unzip the **SalesforceApp <*version number*>.zip** file and open the **SalesforceApp** directory.

Copy files to the relevant directories

To copy the files to the relevant directories, complete the following steps.

1. From the extracted **SalesforceApp** directory, copy the contents of the **application** directory to **[*drive*:]\Program Files\Apache Software Foundation\Tomcat 7.0\webapps\<*appname*>**, where <*appname*> is name of the application. For example, the name of the application is “perceptive”.
2. To make the iScript available to the server, from the **salesforce iscript** directory, copy and paste the **Interact_Doc_VersionControl.js** file to the server at **[*drive*:]\inserver\script** directory.

Configure Tomcat for non-Single Sign-On Enterprise

To configure Tomcat for a non-Single Sign-On (SSO) Enterprise, complete the following steps.

1. From the extracted **SalesforceApp** directory, open the **tomcat** directory.
2. Copy the content of **lib** directory to the **lib** directory of your Tomcat server. For example, ***C:*\Program Files\Apache Software Foundation\Tomcat 7.0\lib**.
3. In your Tomcat server, open **web.xml** available in **conf** directory to edit.
4. Add the following code snippet at the end of the file and before the **</web-app>** tag.

```
<filter>
    <filter-name>InteractFilter</filter-name>
    <filter-class>com.lexmark.interact.InteractFilter</filter-class>
    <init-param>
      <param-name>SiteName</param-name>
      <param-value>perceptive</param-value>
    </init-param>
  </filter>
  <filter-mapping>
    <filter-name>InteractFilter</filter-name>
    <url-pattern>/index.html</url-pattern>
  </filter-mapping>
```

Note In the above code snippet, “perceptive” is the application name. Based on your requirement, you can change the application name.

Restart Tomcat

After extracting the contents of the interactviewer.zip file to the relevant directory, restart the Tomcat server.

Install package

The Perceptive Interact Enterprise package contains the Interact viewer frame to enable Perceptive document management within Salesforce. After installing the package, you can view external content for configured entities as well as capture documents in context.

To install the package, complete the following steps.

1. Download **Perceptive Interact Enterprise** package from https://appexchange.salesforce.com.
2. In the **Package Installation Details** page, complete the following substeps.
    1. Click **Continue** to approve package API access.
    2. Click **Next** to choose the security level.
    3. Under **Select security settings**, select an appropriate access level as per your organization.
    4. Click **Next**.
    5. Click **Install**.

Configure Interact custom settings

To configure Interact custom settings, complete the following steps.

1. At the top of the **Salesforce** page, click **Setup**.
2. In the left pane, under **App Setup**, click **Develop** > **Custom Settings**.
3. In the **Custom Settings** page, under the **Action** column, click **Manage**, available beside **Perceptive Interact Enterprise Settings**.
4. Optional. To download documents, select **Enable download document**.
5. Optional. To view a document in a separate window, select **Open in new window**.
6. Optional. To display the **@mention** functionality, select **Post capture notification**.
7. Optional. To display document properties in the document view window, select **Display document properties**. By default, **Display document properties** is selected.
8. Optional. To display forms in the document view window, select **Display form**.
9. Optional. To display the thumbnail view in the document view window, select **Display thumbnail**. By default, **Display thumbnail** is selected.
10. Optional. To work in restricted mode, select **Enable restricted mode**. In restricted mode you have the following constraints.
    - You cannot view a document in a separate window. **Open in new window** does not function.
    - During document capture, the **Capture Document** window does not display the capture properties.
    - In the document viewer, you can view the icon. You can rotate, zoom, adjust the width and height of your document, but you cannot save the changes to your document.
11. Optional. To hide the header in Interact for Salesforce, select **Hide header**.
12. Click **Save**.

Create connected apps

Create a canvas app to host the Perceptive Interact in Salesforce application.

Create Perceptive Interact canvas app

To create a connected app, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, click the down arrow next to your name and click **Setup** on the menu
2. In the left pane, under **App Setup**, click **Create** > **Apps**.
3. In the **Apps** page, scroll down to the **Connected Apps** section, and click **New.**

4. In the **New Connected App** page, to specify the basic information, including the app name, logo and contact information, in the **Basic Information** section, perform the following substeps.
    1. In the **Connected App Name** box, type the application name. The name must be unique. You must not reuse an existing name or the name of a deleted connected app. For example, Perceptive Interact Enterprise Canvas App.
    2. In the **API Name** box, type InteractCanvasAppEnterprise.
    3. In the **Contact Email** box, type your email id.
5. In the **API (Enable OAuth Settings)**, select **Enable OAuth Settings** and perform the following substeps to configure authentication settings.
    1. In the **Callback URL** box, type a callback URL. For example, https://localhost:8443/sdk/callback.html.
    2. Under **Selected OAuth Scopes**, select the following option and click .
        - **Access and manage your data (api)**
6. In the **Canvas App Settings** section, select **Force.com Canvas** and perform the following substeps.
    1. In the **Canvas App URL** box, type https:// <entire server address with port where the Interact viewer is installed>/<webapps folder name>#interactviewer/SFCanvasEnterprise. For example, type https://test.perceptivedemo.com/perceptive/#interactviewer/SFCanvasEnterprise.
    2. Under **Access Method**, select **Signed Request (POST)**. The **Access Method** specifies how the canvas application initiates the OAuth authentication flow.
    3. Under **Locations**, select the location where the canvas app appears to users. Select the **Visualforce Page** option for location.
    4. Click **Save**.

Manage connected app

To edit the connected app, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, click the down arrow next to your name. On the menu, click **Setup** > **Administration Setup** > **Manage Apps** > **Connected Apps**.
2. In the **Connected Apps** page, click the connected apps that you created for Perceptive Interact Enterprise. Click **Edit**.
3. In the **Connected App Edit** page, under **OAuth policies**, select the **Admin approved users are pre-authorized** option in the **Permitted Users** list.
4. In the **IP Restrictions** list, select **Relax IP Restrictions**.
5. Click **Save**.

Note To use the connected app, you must grant permission to all users through profiles or custom permission set.

Configure the system environment for Salesforce entities

Perceptive Interact Configuration displays Salesforce documents in context of records related to different Salesforce entities. You can configure the view for different Salesforce entities. You can map Salesforce fields to document keys.

To configure the view for different Salesforce entities, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, in the **App Menu** list, select **Perceptive Interact Enterprise**. To view the Perceptive Interact Enterprise app, you need to have **Perceptive Interact Enterprise Admin** permission. For details, refer to the Configure security settings section.

   Note To view Perceptive Interact viewer for a particular Salesforce entity, you need to have access to the specific Visualforce page that is created for that entity, in addition to the assigned permission set. For details, refer to the Configure security settings section.

2. Select the **Perceptive Interact Configurations** tab.
3. To configure a separate connection with the Perceptive Content environment for Salesforce entities, click **New**.
4. In the **Perceptive Interact Configuration Details** page, in the **Information** section, complete the following substeps.
   1. In the **Name** box, type the name of the Interact Configuration. This is a mandatory field.
   2. In the **Tag Object** box, type the Salesforce entity name that you want to map to the Perceptive Interact Configuration record.
   3. From the list that displays, select the actual name of the Salesforce entity. This field is mandatory. For example, if the tag object is Account, type `Acc`, and from the list, select **Account** as the Salesforce entity.

      Note Ensure that you select a valid Salesforce entity as the tag object.

   4. Click **Go** to populate the Salesforce fields.
5. In the **Properties** section, complete the following substeps.
   1. Select a field from the **Field** list. **Field1** to **Field5** refer to the Perceptive Content fields. By selecting a field, you select the document filter condition. During capture, this filter condition appears in read-only mode in the **Document Properties** pane. Beside each row, the **Filter** check box is selected by default to add the condition as a filter condition. If you clear the **Filter** check box, the filter condition is not applied.

      Note Ensure that you select different fields from the **Field** list. Fields cannot be duplicates. You must select at least one document key as a filter condition.

   2. Select at least one field source type from a **Field Source** list to configure with at least one field for a particular Salesforce entity.

    3. In the **Field Source** list, select the type of source. Field Source can be either a **Salesforce Field** or **Literal**.

        - If you select **Salesforce Field** as source type in the **Field Source** list, in **Value** list, select the corresponding value for the **Salesforce Field** source type.

          Note Based on the selected Tag Object, **Field** list values appear. For example, if your **Tag Object** is **Lead**, **Field** list contains Salesforce Lead entity related values.

        - If you select **Literal** as the source type from the **Field Source** list, in the **Value** box, type the value for the corresponding field.

6. Click  to add a row to configure a document filter condition.

7. Click  to delete a row. If there is only one row and you want to delete it, the **Value** box becomes blank.

8. Click **Save**. A custom page where the Interact for Salesforce Enterprise is tagged for that entity is created automatically.

   Note Ensure that you have the relevant permission to create a Visualforce page in Salesforce. For every Salesforce object where the Interact is tagged, a separate Visualforce page is created automatically. For example, if you save the Interact Configuration details for Lead entity, a Visualforce page is created automatically for the Lead entity. The name of the Visualforce page appears in the following format. If the page is not created automatically, you need to create a page manually. For details, refer to Create a page in Salesforce section.

   - `Interact_Ent_<Salesforce entity API name>_Page`

9. After you save the mapping of Salesforce entity and fields, you need to configure the Perceptive Content properties for that entity. To configure the Perceptive Content properties, click **Manage Properties**.

   Note To view **Manage Properties** page, ensure that you created the connected app. For details, refer to Create connected apps section.

10. In the **Perceptive Interact Configuration Details** page, under **Document Properties** section, you can modify the values under **View**, **Drawer, Document Type**, and **Workflow queue**. To modify the values, complete the following substeps.

    1. In the **View** list, select the view in which the document displays.

    2. In the **Drawer** list, select the default drawer name, which is selected by default when you capture a document.

    3. In the **Document Type** list, select the default category of the document. **Document Type** categorizes a document so that you can easily identify its purpose. For example, you assign an employment application to the **Employment Application** type.

    4. In the **Workflow Queue** list, select a workflow queue where you want to submit the captured document. If a default workflow queue is selected, in the **Capture Document** window, in the **Document Properties** pane, the **Add to workflow** check box appears selected and the default workflow queue appears in the list below the **Add to workflow** check box.

Note To add a document to a particular workflow queue, you must have the necessary permissions. If you do not have permission to add documents to any of the queues, the **Add to workflow** check box appears disabled.

- If you select a default queue and the user does not have permission to submit the document to the selected workflow queue, the **Add to workflow** check box appears clear.
- If no default queue is selected, the **Add to workflow** check box appears clear. To select the workflow queue where you have permission to add documents, select the **Add to workflow** check box and select the relevant workflow queue from the list.

11. Click **Save**.

Edit the page layout

You can customize the page layouts for record detail and edit pages. The enhanced page layout editor is a feature-rich WYSIWYG tool that allows you to customize the page layouts for your organization for detail and to edit pages in Salesforce.

1. After logging in to the Salesforce Environment with login credentials, you can edit the page layout of a Salesforce object. To edit the page layout of a particular Salesforce object, click any record of that Salesforce object and click the **Edit Layout** option available at the top of that Salesforce object's record page.
2. To add a section, select the category to which the section belongs on the left column of the pane. Drag the section from the pane to the page. On the **Section Properties** dialog box, in the **Section Name** box, type a suitable section name and complete the following substeps.
    1. Select the **1-Column** option as **Layout**.
    2. Clear the **Edit Page** check box.
    3. Click **OK**.
3. In the newly created section, drag the **Visualforce** page, that is, **Interact_Ent_<*Salesforce entity API name*>_Page**, click and complete the following substeps.
    1. In the **Visualforce Page Properties** dialog box, type `100%` in the **Width** (in pixels or percent) box and `650` in the **Height** (in pixels) box.
    2. Select **Show scrollbars**.
    3. Click **OK**.

Support for community pages

Community page is a space where you can share information and connect with people who are important to your business process. To get support for your community page, you need to create a new canvas app. According to your choice, you can provide a name for your canvas app.

Note To create a canvas app, follow the steps discussed in Create connected apps section. To manage the connected app, refer to Manage connected app section.

To show Interact for Salesforce in your community page, you need to add the following code snippet. For details, refer to Host Interact for Salesforce in a custom page section.

```
<pvi:interact4sfcomponent hostRecordId="<Record ID to be passed on>"
canvasAppDeveloperName="<Name of your newly created canvas app>"
></pvi:interact4sfcomponent>
```

Configure security settings

The Perceptive Interact package contains the following permission set that enables you view the Interact viewer and administrative section.

- **Perceptive Interact Enterprise Admin** – It is the basic permission set to grant administrative access rights to all Interact related classes and files, including the administrative pages. If this permission set is applied on a user, group, or profile, the particular user, group, or profile enjoys the administrative rights to view, edit, and configure the Interact Salesforce administrative section.
- **Perceptive Interact Enterprise User Base** – It is the base permission set for any Salesforce user to access the underlying Interact classes to view Perceptive Interact Salesforce Viewer. This permission set will not grant any administrative rights.

To view the Perceptive Interact viewer for a particular Salesforce entity with either of the above permissions, you need to provide the access to the specific Visualforce page that is created for that entity, in addition to the assigned permission set.

For example, to view Interact viewer for the Lead entity, you need to provide access to the page that is created for the Lead entity along with the Perceptive Interact Enterprise User Base permission set.

Similarly, to view the Perceptive Interact viewer for a particular Salesforce entity, you need to provide the access to the specific Visualforce page that is created for that entity, in addition to the Perceptive Interact Enterprise Admin permission set.

Note If the Visualforce page for a particular entity is not created automatically, refer to Create a page in Salesforce.

Assign Permission Set to a user

To assign the either **Perceptive Interact Enterprise Admin** permission set or **Perceptive Interact Enterprise User Base** permission set, complete the following steps.

1. Click **Setup** > **Administration Setup** > **Manage Users** > **Permission Sets**
2. Select the appropriate permission set.
3. Click **Manage Assignments**.
4. Click **Add Assignments** to add a user.
5. From the **View** list, select an appropriate user view.
6. Select the appropriate users.
7. Click **Assign**.

Create a page in Salesforce

To create a page manually, complete the following steps.

1. After you log in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, click the down arrow next to your name. On the menu, click **Setup** > **App Setup** > **Develop** > **Pages**.
2. In the **Visualforce** page, click **New**.
3. In the **Label** box, type the label name that identifies the page.

4. In the **Name** box, type the name of the page. This name must begin with an alphabet and can contain only underscores and alphanumeric characters. It must not include spaces, end with an underscore, or contain two consecutive underscores.
5. Optional. In the **Description** box, type a description for the page.
6. In the **Visualforce Markup** box, type the following code snippet.

   ```
   <apex:page standardController="<standardController name>" showHeader="false" >
       <pvi:Interact4SFComponent ></pvi:Interact4SFComponent>
   </apex:page>
   ```

   For example, the Visualforce page that is used to tag the Product entity in Salesforce consists of the following snippet.

   ```
   <apex:page standardController="Product2" showHeader="false" >
       <pvi:Interact4SFComponent ></pvi:Interact4SFComponent>
   </apex:page>
   ```

7. Click **Save**.

Extend Interact for Salesforce

After capture, arguments and target record ID are published to external Salesforce. To implement this event, complete the following steps.

1. Create one Salesforce apex class that implements the Interact for Salesforce interface. Following parameters are passed through the interface.
   - documentId
   - documentName
   - drawerName
   - field1
   - field2
   - field3
   - field4
   - field5
   - type
   - sfRecordId
   - sfObjectType
2. At the top of the **Salesforce** page, click **Setup**.
3. In the left pane, under **App Setup**, click **Develop** > **Custom Settings**.
4. In the **Custom Settings** page, under **Action** column, click **Manage**, available beside **Perceptive Interact Enterprise Settings**.
5. Click **Edit**.
6. In the **Class name** box, type the name of the extended apex class.

Note While creating the extended apex class, ensure that the apex class name is identical to the name provided in the **Class name** box. The extended apex class name is case sensitive.

7. Click **Save**.

Sample format for extended apex class

An extended apex class format is shown in the following example.

```
global with sharing class InteractApiHandler implements
pvi.InteractApiHandlerInterface {
    global void doPostCaptureTask(Map<string,string> argumentMap){
       system.Debug('Capture parameters -- documentId::' +
argumentMap.get('documentId') +
           ' and name:: ' + argumentMap.get('documentName')
                   + ' and recordId:: ' + argumentMap.get('sfRecordId')
           + ' and objectType:: ' + argumentMap.get('sfObjectType')
           + ' and field1:: ' + argumentMap.get('field1')
           + ' and field2:: ' + argumentMap.get('field2')
           + ' and field3:: ' + argumentMap.get('field3')
           + ' and field4:: ' + argumentMap.get('field4')
           + ' and field5:: ' + argumentMap.get('field5')
           + ' and type:: ' + argumentMap.get('type')
           + ' and drawer:: ' + argumentMap.get('drawerName'));
       }
}
```

Host Interact for Salesforce in a custom page

To host Interact for Salesforce in a custom Salesforce page, you need to provide the parameter name to tag the custom page. Using the `$CurrentPage` global variable, you can access the query string parameters for a page by specifying the parameter attribute, and access each individual parameter. For example, to view all documents related to a particular record in Interact for Salesforce, you must provide the specific record ID in the custom Salesforce page. Below is a sample URL for viewing documents related to a particular Salesforce record in Interact for Salesforce.

https://login.salesforce.com/Interact4CustomCommunityPage?id=001U000000xiUKC&cid=00QU000000L3MgQ

Sample code snippet to host custom component

The following is a sample code snippet for custom component hosting.

```
<pvi:Interact4SFComponent
  hostRecordId="{!$CurrentPage.parameters.cid}"
  canvasAppDeveloperName="<Name of your newly created canvas app>"
  </pvi:Interact4SFComponent>
```

Note In the above example, cid is the parameter name that you need to change based on your requirement. There must be a configuration entry for the parameter to tag the custom page.

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