ImageNow Interact for Microsoft SharePoint

Installation, Setup, and User Guide

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Table of Contents

Overview 3

Required Components 3

   Installer package 3

   Software prerequisites 3

   Licenses 3

   Conditions for installation 3

Installation and Setup 4

   Download ImageNow Interact for SharePoint 4

   Install ImageNow Interact for SharePoint 4

   Access audiences 6

   Manage audiences 7

     Search for an audience 7

     View an audience 7

     Create a new audience 7

   Create a generic user account 9

   Add the Interact for SharePoint Web part to the Web part gallery 9

   Edit the properties File for Interact for SharePoint 10

   Add the Web part to the portal site 12

Using ImageNow Interact for SharePoint 13

   Getting Started 13

     About the Interact for SharePoint tabs 13

     About the Interact for SharePoint document grid 14

   Process documents 15

     Search for a document 15

     View a document 16

     Save a document 16

     Add a document to version control 17

     Remove a document from version control 17

     Check out a document 17

     Check in a document 18

     Digitally sign a document 18

   Process documents in a workflow 19

     View a document in a workflow queue 19

     Route a document to another workflow queue 19

   Add a new document to ImageNow 20

Appendix A: inow6_sp.properties file 21

Index 26

Overview

This document explains how to install ImageNow Interact for Microsoft SharePoint, how to perform all procedures to add the ImageNow Interact web part to a SharePoint site, and how to use ImageNow Interact for SharePoint. Where appropriate, the sections include subsections for installing ImageNow Interact on SharePoint 2010 and SharePoint 2007.

Required Components

Installer package

You can install ImageNow Interact for SharePoint 2010 using the 64-bit installer package and ImageNow Interact for SharePoint 2007 using either of the following two installer packages depending on the operating system.

·   64-bit installer package on a 64 bit OS

·   32-bit installer package on a 32 bit OS

Make sure you run the appropriate installer that matches your operating system. For example, only install the 64-bit installer on a 64-bit operating system. Installing the 32-bit installer package on a 64-bit operating system or a 64-bit installer package on a 32-bit operating system is not supported.

Software prerequisites

You must fulfill the following prerequisites before you install ImageNow Interact for SharePoint.

·   Microsoft Office SharePoint Server (MOSS) 2007 or SharePoint Server2010

·   Microsoft .NET Framework v3.5 or above for SharePoint 2010 and v2.0 or above for SharePoint 2007

·   Message Agent Server

·   Message Agent bridge user account. A bridge user account is required for ImageNow Interact for SharePoint to establish a session with the Message Agent Server. This user account is a generic account that you should create in ImageNow. Refer to the "Create a generic user account" section.

·   ImageNow Server

Licenses

You are required to have the following licenses:

·   ImageNow Server

·   Message Agent Server

Conditions for installation

·   Your SharePoint login ID must be identical to your ImageNow login ID, assuring proper operation of ImageNow Interact for SharePoint single sign-on capabilities.

·   You must have a common guest user login for all those who log in as guest users.

Installation and Setup

In the following sections, you will learn how to perform the following tasks:

- Download ImageNow Interact for SharePoint
- Install ImageNow Interact for SharePoint
- Access audiences
- Manage audiences
- Create a generic user account within ImageNow
- Edit the Properties File for Interact for SharePoint
- Add the Interact for SharePoint Web part to the Web part gallery
- Add a Web part to the site

Download ImageNow Interact for SharePoint

1. Go to the Perceptive Software website at www.perceptivesoftware.com, click **Customer Portal**, enter your user name and password, and then click **Downloads**.
2. In the **Product Downloads** page, download the following files to a temporary directory on your computer:
   - The product installer
   - The product readme
3. Review the product readme.
4. Unzip the installer if applicable.

Install ImageNow Interact for SharePoint

You must run this setup file on the SharePoint server computer.

1. Double-click the EXE file you just downloaded.
2. On the **Welcome to the ImageNow Interact for SharePoint Installation Wizard** page, click **Next**.
3. On the **License Agreement** page, select **I accept the terms in the license agreement**, scroll to the bottom of the agreement, and then click **Next**.
4. On the **Destination Folder** page, if you need to change the destination folder, click **Change** and select the appropriate folder. To continue, click **Next**.
5. On the **Ready to Install the Program** page, click **Install**.
6. Optional. If the **Show the Windows Installer log** check box appears, you can select the check box to view the log file.
7. On the **Installation Wizard Completed** page, click **Finish**.

8. Register the Interact for SharePoint Web part as a Safe Control within Internet Information Services (IIS) by editing the **web.config** file of the Website.

    Each Website configured under IIS has its own **web.config** file, which resides in a directory structure that corresponds to the port number under which SharePoint operates. For example, if SharePoint is configured to run under the default port 80, the **web.config** file is located in the following directory: **[*Drive:*]\Inetpub\wwwroot\wss\VirtualDirectories\80 directory**.

    Note Make a backup of the **web.config** file before changing it. It is an IIS configuration file and gives you a way of backing out of this installation, if needed.

9. After you back up the **web.config** file, browse to the **[*drive*]:\Windows\Assembly** folder, scroll to the **ImageNowSPInteract** entry and copy the value in the **Version** column.

10. Open the **web.config** file and, under **<SafeControls>**, add the following **<SafeControl>** element:

    For 2010:

```
<SafeControl
Assembly="ImageNowSPInteract, Version=version number, Culture=neutral,
PublicKeyToken=997ca8b7d8c33e19"
Namespace="ImageNowSPInteract"
TypeName="*"
Safe="True"
SafeAgainstScript="False"
/>
```

    For 2007:

```
<SafeControl
Assembly="ImageNowSPInteract, Version=version number, Culture=neutral,
PublicKeyToken=997ca8b7d8c33e19"
Namespace="ImageNowSPInteract"
TypeName="*"
Safe="True"
/>
```

    where *version number* is the value you copied in the previous step.

    In the following table, the version number of ImageNowSPInteract entry in the Assembly folder is 1.0.0.0.

Assembly Name	Version	Public Key Token
ImageNowSPInteract	1.0.0.0	997ca8b7d8c33e19

    To use the example in the table, add the following <SafeControl> element in case of SharePoint 2007:

```
<SafeControl
   Assembly="ImageNowSPInteract, Version=1.0.0.0, Culture=neutral,
PublicKeyToken=997ca8b7d8c33e19"
   Namespace="ImageNowSPInteract"
TypeName="*"
   Safe="True"
   />
```

11. Establish and configure the necessary SharePoint audiences, as explained in the following section.

12. Browse to the following folder:

   · For SharePoint 2010: **[drive:]\Program Files\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE\LAYOUTS\imagenow\previewtemp**.

   · For SharePoint 2007: **[drive:]\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\ LAYOUTS \imagenow\previewtemp**.

13. Modify the permissions of the **previewtemp** folder to allow read and write access for every user profile you created.

   Note You must create user profiles within SharePoint before you can map them to an audience. In addition, you must compile the audience after making any changes to it.

Access audiences

ImageNow Interact for SharePoint supports up to five named user audiences and two guest user audiences. The following table shows which ImageNow functions are granted to the following audience types.

	Audience					
Feature	**Guest View**	**View**	**Views**	**Workflow**	**Advanced**	**Power User**
Search document views			X	X	X	X
View all accessible document results			X	X	X	X
View user-specific document results	X	X				
Document preview	X	X	X	X	X	X
Search workflow queues				X	X	X
Route to workflow queue				X	X	X
Add new document						X
View document (native format)	X	X	X	X	X	X
Check in and check out documents					X	X
Digital signatures					X	X
Capture documents						X

Manage audiences

You do not need to define all of the audiences, but every user of the Interact for SharePoint Web part must be a member of at least one audience. In the **Edit the properties file** section later in this document, enter audience names in the inow6_sp.properties file after configuring the audiences in this section.

To manage user audiences in SharePoint 2010, perform the following steps:

1. On the **SharePoint Central Administration** home page, on the left pane, click **Application Management**.

2. On the **Application Management** page, under **Service Applications**, click **Manage service applications**.

3. On the **Service Applications** page, click **User Profile Service Application**.

4. On the **Manage Profile Service: User Profile Service Application** page, click **Manage Audiences**.

5. On the **View Audiences** page, you can perform the following tasks:

   · Search for an audience

   · View an audience

   · Create a new audience

   · Delete an audience

Search for an audience

To search for an audience in SharePoint 2010, perform the following steps:

1. On the **View Audiences** page, under **Find audiences that start with**, type the first letter, partial name, or full name of the name of the audience you are searching for.

2. Click **Find**.

View an audience

To view an audience in SharePoint 2010, perform the following step:

· On the **View Audiences** page, in the **View** list, select the appropriate option.

Create a new audience

To create a new audience in SharePoint 2010, perform the following steps:

1. On the **View Audiences** page, click the **New Audience** icon.

2. On the **Create Audience** page, perform the following substeps:

   1. In **Name**, type the name of the audience.

   2. Optional. In **Description**, type a description of the audience.

   3. Optional. In **Owner**, type your user name and click the **Check Names** button.

   Note When you click the **Check Names** button, your domain name is populated.

3. Select one of the following options to set how to satisfy the rules.

   · Satisfy all of the rules

   · Satisfy any of the rules

   Note Consult your SharePoint administrator for this information.

4. Click **OK**.

5. On the **Add Audience Rule: <*Name of the Audience*>** page, perform the following substeps:

    1. Select one of the following options:

        ·   User

        ·   Property

    2. In the **Operator** list, select an operator for the rule.

    3. In the **Value** box, type the SharePoint user's name and click the **Check Names** button.

6. Click **OK** to begin adding rules.

7. To add a rule, on the **Add Audience Rule:<rule name>** page, configure the initial rule for the audience. You can add more rules later. You can define an audience rule in two ways:

    ·   If you want to define a specific user in a rule, select **User**, select = in the **Operator** list, and type the SharePoint user's name in the **Value** box.

    ·   If you want to choose a property to share by several users, select **Property** and display the user profile properties list below Property. Select the property you want, select the operator in the **Operator** list, and then type in the value you want in the **Value** box.

8. To complete the rule and display the finished rule, on the **View Audience Properties** page, click **OK**.

    Note You can add more rules by clicking **Add Rule** under **Audience Rules** and repeating the previous steps to add additional rules.

9. On the **Manage Profile Service: User Profile Service Application** page, click **Compile Audiences**.

    Note If the compilation process is successful, the number of uncompiled audiences is zero.

10. Under **Audiences**, view the updated status of the following:

    ·   Number of Audiences

    ·   Uncompiled Audiences

    ·   Audience Completion Status

    ·   Last Compilation Time

Notes

·   To edit audiences, under **Audience Properties**, click **Edit audience**.

·   To view members of the audience, under **Audience Properties**, click **View membership**.

Manage user audiences in SharePoint 2007

To manage user audiences in SharePoint 2007, perform the following steps:

1. Open the **SharePoint Central Administration** console.

2. In the left pane of the **Home** tab, under **Shared Services Administration**, click the name of the shared services that you want to use with the Interact for SharePoint web part.

3. In the **Audiences** list, click the **Audiences** link to display a summary of current audiences.

4. On the **Manage Audiences** page, click the **Create audience** link.

5. On the **Create Audience** page, enter the name, an optional description, and an optional owner name.

6. Under **Include Users who**, select how the rules will be satisfied. Normally, you select the **Satisfy any of the rules** option to allow the largest number of users, but the SharePoint administrator must make the final decision.

7. Click **OK** to begin adding rules.

8. To add a rule, on the **Add Audience Rule: <rule name>** page, configure the initial rule for the new audience. You can add more rules later. You can define an audience rule in two ways:

    ·   If you want to define a specific user in a rule, select **User**, select **=** in the **Operator** list and type the SharePoint user's name in the **Value** box.

    ·   If you want to choose a property to share by several users, select **Property** and display the user profile properties list below **Property**. Select the property you want, select the operator in the **Operator** list, and then type in the value you want in the **Value** box.

9. Click **OK** to complete the rule and display the finished rule in the **View Audience Properties** page. You can add more rules by clicking **Add Rule** under **Audience Rules** and repeating the previous steps to add a rule as many times as necessary.

10. When you are ready to continue, on the **View Audience Properties** page, click **Compile audience** to refresh the values in the right column.

11. To ensure that your rules are returning the right members, click **View Membership** and inspect the list. If it is not correct, select a rule in the list at the bottom of the page and modify it accordingly.

Create a generic user account

1. Create a user account within ImageNow to function as the bridge user within ImageNow Interact for SharePoint communication within Message Agent. Give the user a user name such as SharePointBridge and make a note of this name, which is required in the setup section later in this document.

    However, the user must be capable of being properly authenticated, so the user must be created either as a local user on the ImageNow Server or in the LDAP server, such as Microsoft Active Directory.

2. In Windows, select **Start > Settings > Control Panel**, and select **User Accounts**. Create a user that corresponds to the user you created in step 1 and make a note of the password you define for this user.

    Note Depending upon your authentication source (such as LDAP), your application administrator might need to establish the bridge account in that location.

Add the Interact for SharePoint Web part to the Web part gallery

In this procedure, you make the Web part available to all sites located below the current site within the SharePoint hierarchy.

You must have administrative privileges within this site to perform this update. The method you use depends upon your version of SharePoint Server.

·   **For SharePoint 2010**

    1. On the portal page, click **Site Actions** and in the list, select **Site Settings**.

    2. On the **Site Settings** page, under **Galleries**, click **Web parts**.

    3. On the **Web Part Gallery** page, in the main toolbar, click the **Documents** tab and select the **Upload Document** option.

    4. Browse to **[*drive*:]\inserver6\etc\ImageNowWebPart.webpart** and click **OK**.

5. On the **Web Part Gallery** page, click the **Edit** tab and click **Save** to save the settings.

6. Confirm that the **ImageNowWebPart.webpart** entry now appears in the Web Part Gallery list.

· **For SharePoint 2007**

1. Locate the **ImageNowWebPart.webpart** file, located in the **[***drive:***]\inserver6\etc** directory on the SharePoint Server.

2. In the upper-right portion of the portal page, click **Site Actions** and select **Site Settings** in the list.

3. If you are currently working with the top-level site for the shared service, skip to the next step. If not, on the **Site Settings** page, in the **Site Collection Administration** column, click **Go to top level site settings**.

4. On the **Site Settings** page, under **Galleries**, click **Web Parts**.

5. If you are currently working with the top-level site for the shared service, skip to the next step. If not, on the **Top-level Site Administration** page, in the **Site Collection Galleries** section, click **Manage Web Part** gallery.

6. On the **Web Part Gallery** page, in the main toolbar, click the arrow to the right of **Upload** and select the **Upload Document** option.

7. Browse to and select the **ImageNowWebpart.webpart** file that you previously copied into the **[***drive:***]\inserver6\etc** directory.

8. Click **OK**.

9. When the confirmation dialog box appears, select the appropriate web part group and click **OK**.

   Note Do not modify the **Name** field or **Title** fields.

10. Confirm that the **ImageNowWebPart.webpart** entry now appears in the **Web Part Gallery** list.

Edit the properties File for Interact for SharePoint

1. Edit the **inow6_sp.properties** file normally located in the C:\inserver6\etc directory. At a minimum, configure the following parameters. For additional parameters you can set, refer to the comprehensive table in Appendix A.

Setting	Options	Default Setting	Description
LogFileDir	Valid directory location	C:\inserver6\log	The location of the directory where Interact writes the ImageNow SharePoint plug-in error and debug log files.
BridgeUserName	Valid ImageNow user		The username of the generic ImageNow bridge user account used to establish an initial session with ImageNow.
BridgeUserPwd	Password for the BridgeUserName user		The password of the generic ImageNow bridge user account.

Setting	Options	Default Setting	Description
MAPort	Valid port number	6070	The port Message Agent uses to connect to Interact for SharePoint.
MABaseURL	Valid URL	http://localhost:6070/	The base URL for Message Agent.
ImageFileRootPath	Valid directory location	For SharePoint 2007: [C:]\\Program Files\\Common Files\\Microsoft Shared\\web server extensions\\12\\TEMPLATE\\LAYOUTS\\imagenow\\ For SharePoint 2010: [C:]\\Program Files\\Common Files\\Microsoft Shared\\web server extensions\\14\\TEMPLATE\\LAYOUTS\\imagenow\\	The file path to the location where images for ImageNow Interact are kept. Path directory names are case sensitive.
GuestViewINUserName	Valid ImageNow user		The ImageNow user account name is used by all SharePoint users who are members of the "Guest View" audiences. They are not individual ImageNow users.
GUEST_VIEW_AUD_NAME VIEW_AUD_NAME VIEWS_AUD_NAME WORKFLOW_AUD_NAME ADVANCED_AUD_NAME POWERUSER_AUD_NAME	Valid audience name	GUEST_VIEW_AUD_NAME= IN_GUEST_VIEW VIEW_AUD_NAME=IN_VIEW VIEWS_AUD_NAME=IN_VIEWS WORKFLOW_AUD_NAME= IN_WORKFLOW ADVANCED_AUD_NAME= IN_ADVANCED POWERUSER_AUD_NAME= IN_POWER_USER	Enter these values below **# Audience Constants** in the file. Values are case sensitive. The values are configured in the "Access and create a new audience" section. The format for each of the entries is: <PARAM_NAME> = <AUDIENCE_NAME> where<AUDIENCE_NAME> is a placeholder for the audience name created within SharePoint.

2. Restart the **World Wide Web Publishing** service on the SharePoint Server.

3. Access the top-level site within SharePoint and add the **ImageNow Interact for SharePoint** web part to the SharePoint web part gallery, as explained in the following section.

Note The above table shows the settings required for your configuration. Appendix A contains a table that shows additional options you can set.

Add the Web part to the portal site

1. Browse to the portal site to which you want to add the Interact for SharePoint component.

2. Log in with an account that has administrative-level privileges to the site and perform the following procedures:

    · **For SharePoint 2010**

        1. On the portal page, click **Site Actions** and in the list, select **Edit Page**.

        2. On the page, click **Add a Web Part**.
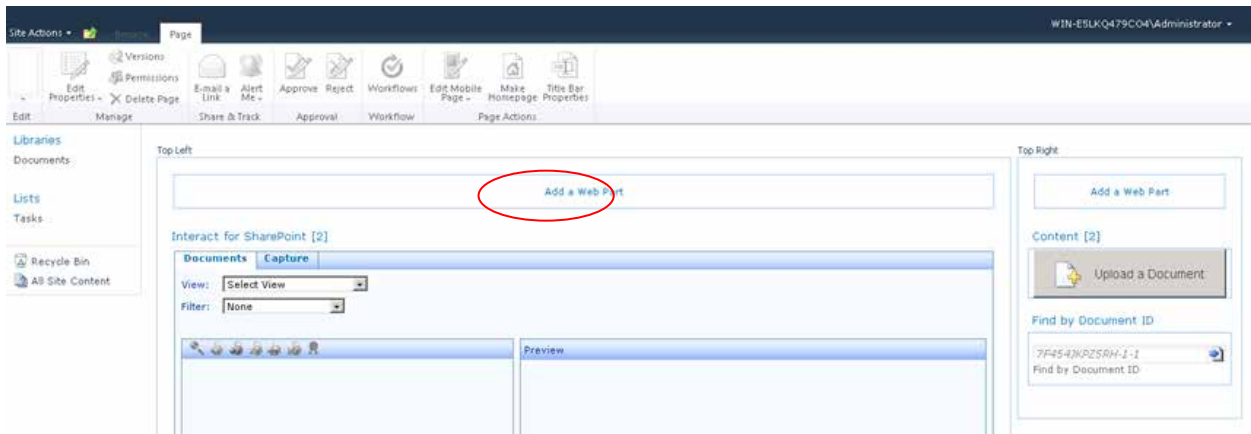
        3. Under **About the Web Part**, in the **Add Web Part to list**, select the appropriate option.

        4. In the **Categories** list, select the **Miscellaneous** folder.

        5. Under **About the Web Part**, click **Add**.

        6. Verify that the ImageNow Interact for SharePoint Web part is working within the current page.

    · **For SharePoint 2007**

        1. In the upper-right portion of the page, click **Site Actions** and then select **Edit Page**. This refreshes the page with its edit view enabled.

        2. In the web part zone you want, click **Add a Web Part**.

        3. In the **Add Web Parts** dialog box, click **Advanced Web Part** gallery and options.

        4. In the web part list, browse to and select the **ImageNowWebPart**. The associated **Home Gallery**, located above the web part list, is selected in the collections list. If applicable, click **Next** to navigate to the **ImageNow Interact for SharePoint** web part.

        5. Drag **ImageNowWebPart** to the location you want on the page.

        6. Above the **Add Web Parts** pane, click **Exit Edit Mode**.

        7. Verify that the ImageNow Interact for SharePoint Web part is working within the current page.

Using ImageNow Interact for SharePoint

ImageNow Interact for Microsoft SharePoint allows you to perform many of the same key tasks for managing documents within SharePoint that you can in ImageNow Client. To perform these tasks, your SharePoint administrator must grant you access to the appropriate audience within SharePoint. For more information on SharePoint audiences, refer to the "Access audiences" section.

This section describes only end-user tasks performed using the ImageNow Web part for SharePoint. It assumes that ImageNow Interact for Microsoft SharePoint was installed and set up as described in the preceding sections.

Getting Started

About the Interact for SharePoint tabs

The Interact for SharePoint web part consists of three tabs:

· Documents

· Workflow

· Capture

The following table indicates the appropriate tab to select to perform the task you want.

Tab	Available tasks
Documents	Search for a document View a document Save a document Check in or check out a document Add or remove a document from version control Digitally sign a document
Workflow	View a document in a workflow queue Add a document to version control Route a document
Capture	Add a document to ImageNow

About the Interact for SharePoint document grid

When displaying a view, Interact for SharePoint displays the document grid. Each row in the grid represents a document that resides in ImageNow. You can preview any item in the grid by clicking any text field in its row.

When you select a row, Interact for SharePoint highlights the row and displays a preview and the available options for that document.

The status of each document is indicated by the icons in the Workflow. These status icons are described in the following table.

Icon	Description
	The document is in a workflow.
	The document is part of a project.
	The document is version controlled and is checked out to another user.
	The document is version controlled and is not checked out.
	The document is version controlled and is checked out to you.
	The document is marked private.
	The document is digitally signed.

Process documents

You can use Interact for SharePoint to view and process documents in a very similar way to using ImageNow.

Search for a document

In ImageNow Interact for SharePoint, you can search for a document using the following:

· Views

· Filters

A view is a set of documents or projects selected according to a view definition created by your ImageNow administrator. Views allow preset conditions and grid formatting that add power, versatility, and convenience to searching.

You can also use filters, which act as special-purpose refinements of a view. Any private filters defined for a view in ImageNow are available in Interact for SharePoint. Your ImageNow administrator can make private filters available to all users of the corresponding view by publishing them as public filters.

When searching for a document, you should define the conditions of the search by selecting a view and optionally selecting a filter and defining search terms in the Documents tab, shown below.
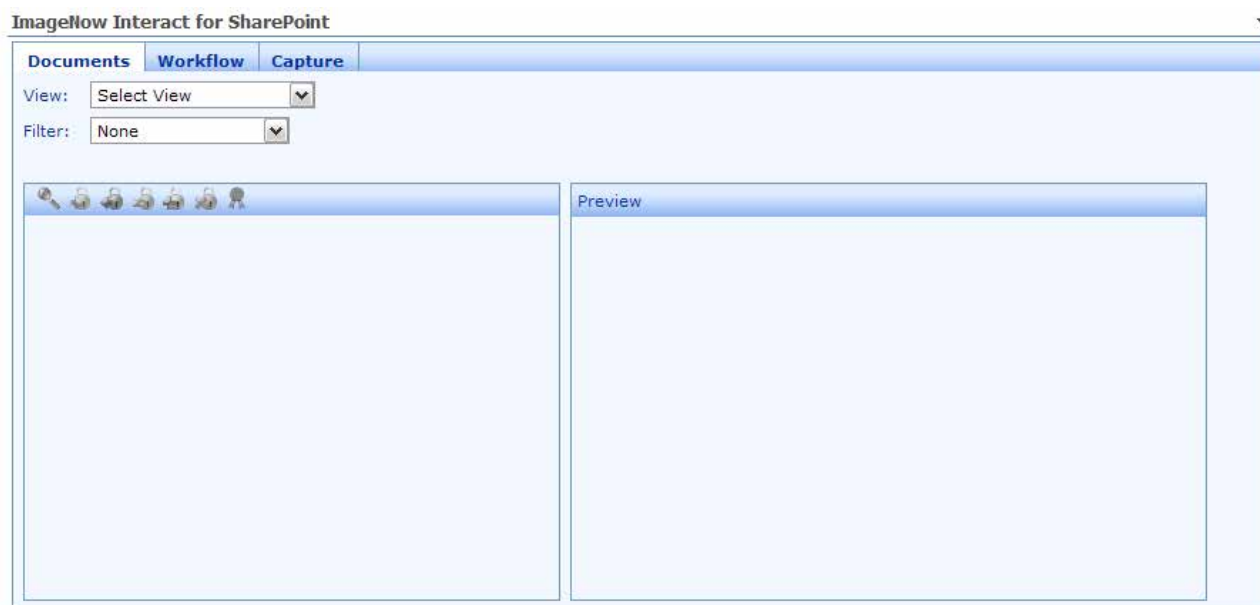
1. In **ImageNow Interact for SharePoint**, click the **Documents** tab.

2. In the **View** list, select a view.

3. In the **Filter** list, select a filter if there are private or public filters available for the view.

4. Enter search terms if you want to narrow your search for the document:

   · Select the document key, such as **Drawer** or **Folder**. This selection sets the property or field in each document that is the basis of the comparison.

   · In the **Operator** list, select an operator, such as **is equal to or is greater than**, that is used in the comparison.

   · In the **Value** box, type a value to compare to the document's property or field, using the selected operator.

5. Click the **Go** → button.

Note The following table shows the available document key search terms. These are the default labels for the document keys. However, the names of the document keys are customizable by altering the **Document Key Headers** in the **inow6_sp.properties** file. For more information on editing the properties file, refer to "Edit the properties file for Interact for SharePoint" section.

Document Keys			
Drawer	Tab	Field4	Document Type
Folder	Field3	Field5	ANY Document Key

View a document

1. Select the document that you want to view by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

2. Click the **View and Download Document** button.

3. Click **Find**.

4. To view the document in the appropriate viewing application, click the application.

Note You can configure whether to display documents in their native viewer (Adobe Acrobat, Microsoft Word, Imaging For Windows, and so on) or within the WebNow viewer by altering the **inow6_sp.properties** file. You must have WebNow licenses available to use the WebNow option.

Save a document

1. Select the document that you want to save by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

2. Click the **View and Download Document** button.

3. Click **Save**.

4. Navigate to where you want to save the document.

5. Click **Save**.

Add a document to version control

Any document checked into version control is accompanied by a status indicator in the **Version Controlled** column. If the **Version Controlled** column is empty, the document is not added to version control.

1. Select the document you want to add to version control by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

2. Click the **Add to Version Control** button.

3. In the **Add Document to Version Control** dialog box, perform the following substeps:

    · In the **Comments** box, type your comments.

    · Optional. Select the **Make Private** check box. By marking a document private, you lock out other users, except for managers or the owner, from viewing and working on the current version of the document.

    · Optional. Select the **Maintain Version History** check box to retain a copy of each revision of the document.

4. Click **Add**. The document is marked with the **checked in** icon in the **Version Controlled** column to indicate that it is in version control, but not checked out.

Remove a document from version control

When you remove a document from version control, the document loses any digital signatures applied to the current version. The signatures are not reinstated if you add the document to version control again.

To remove a document from version control, you must have the Document Management - Remove from Version Control privilege. Your ImageNow administrator assigns this privilege.

1. Select the document you want to remove from version control by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

    Note If a document is version controlled, you can move your cursor over the icon in the **Version Controlled** column to see the **Version**.

2. Click the **Remove from Version Control** button.

3. In the **Remove Document from Version Control** dialog box, select the **Maintain Version History** check box to retain the history on the document. The version history is stored as a document property.

4. Click **Remove**. The **checked in** icon is removed from the **Version Controlled** column.

Check out a document

When you check out a document, the new version created does not inherit any digital signatures from the previous version.

You can check out a document only when it has not been checked out by someone else. The **checked in** icon indicates that a document is in version control, but is not already checked out.

1. To select the document you want to check out, click any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

    Note If a document is version controlled, you can move your cursor over the icon in the **Version Controlled** column to see the **Version**.

2. Click the **Check Out** button.

3. In the **Check Out Document** dialog box, in the **Comments** box, type any comments you want to associate with the check out.

4. Click **Check Out**. The document is checked out to you, indicated by the **checked out** icon.

Check in a document

When you check in a document, the new version created does not inherit any digital signatures from the previous version.

Before you can check a document in, you must have it checked out. A document that is checked out by you is indicated by the **checked out** icon.

1. To select the document you want to check in, click any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

2. Click the **Check In** button.

3. In the **Check In Document** dialog box, perform the following substeps:

    ·   If you want to upload a new file to replace the existing file, click **Browse**, navigate to the file location, select the file, and click **Open**. To check in the original file, leave the **File** box blank.

    ·   Optional. In the **Comments** box, type any comments you would like to be associated with the check in.

    ·   Optional. To mark the document as private, select the **Make Private** check box. By marking a document private, you lock out other users, except for managers or the owner, from viewing and working on the current version of the document.

4. Click **Check In**.

Digitally sign a document

You can only digitally sign documents that are in version control.

1. Select a version-controlled document you want to sign by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

2. Click the **Sign Document** button.

3. In the **Sign Document** dialog box, perform the following substeps:

    1. In the **Reason** list, select the appropriate reason for signing the document.

    2. In the **Password** box, type a password.

4. Click **Sign**. The document is accompanied by a certificate icon in the **Signature Status** column.

Process documents in a workflow

Interact for SharePoint allows you to view documents in your ImageNow workflow queue and route them to another queue.

View a document in a workflow queue

1. In **ImageNow Interact for SharePoint**, click the **Workflow** tab.

2. In the **Queues** list, select the appropriate queue.

3. Click the **Go** button.

4. Select the document you want to view by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

5. Click the **View and Download Document** button.
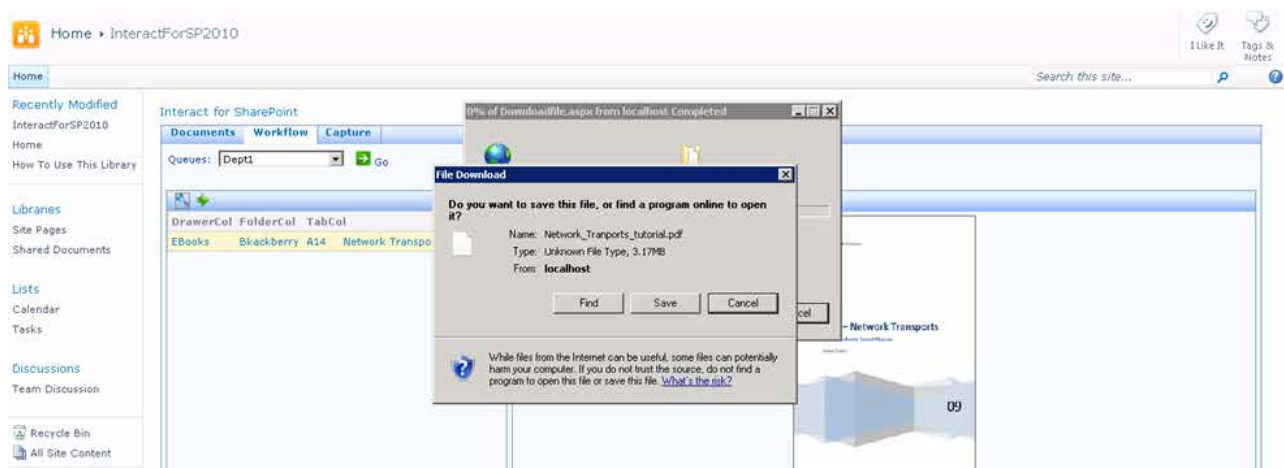
6. Do one of the following:

   · To save the document, click **Save**, navigate to where you want to save the document, and click **Save** again.

   · To view the document in the appropriate viewing application, click **Find** and click the application.

Note You can configure whether to display documents in their native viewer (Adobe Acrobat, Microsoft Word, and so on) or within the WebNow viewer by altering the **inow6_sp.properties** file. You must have WebNow licenses available to use the WebNow option.

Route a document to another workflow queue

1. In **ImageNow Interact for SharePoint**, click the **Workflow** tab.

2. In the **Queues** list, select the appropriate queue.

3. Click the **Go** button.

4. Select the document you want to route to a different queue by clicking any field in the document row. Interact for SharePoint displays a preview of the document and highlights the document row.

5. Click the **Route** button.

6. In the **Route Document to Workflow Queue** dialog box, do one of the following:

   · To send the document to the next queue in the workflow process flow, click the **Route Forward** button.
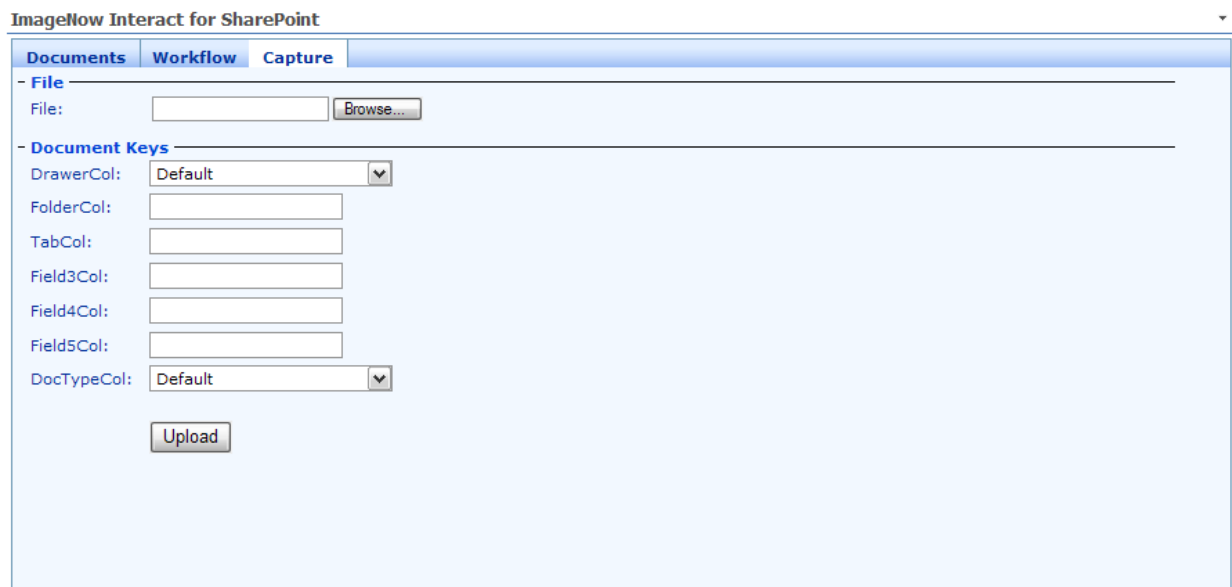
     Note The document only routes forward if the route is configured as a sequential auto route.

   · To select a queue in the workflow process to which to send the document, in the **Route Anywhere** list, select a workflow queue and then click .

Add a new document to ImageNow

You can add a new document to ImageNow using Interact for SharePoint.

1. In the **ImageNow Interact for SharePoint**, click the **Capture** tab.

2. Select a file to upload, click **Browse**, navigate to the file location, select the file, and then click **Open**.

3. To ensure that the document is organized and searchable. enter the appropriate document keys:

   · In the **DrawerCol** list, select the appropriate drawer.

   · In the **FolderCol** box, type the name of the appropriate folder.

   · Optional. In **TabCol**, type the name of the appropriate tab.

   · Optional. In **Filed3Col**, enter a value.

   · Optional. In **Filed4Col**, enter a value.

   · Optional. In **Filed5Col**, enter a value.

4. In the **DocTypeCol** list, select the appropriate document type.

5. Click **Upload**.

Note The default labels for the document keys are shown in the figure. However, the names of the document keys are customizable by altering the **Document Key Headers** in the **inow6_sp.properties** file. For more information on editing the properties file, refer to the "Edit the properties file for Interact for SharePoint" section.

Appendix A: inow6_sp.properties file

The following table provides definitions and setting options for the inow6_sp.properties configuration file. The inow6_sp.properties file contains global configuration properties for the ImageNow web part used by the Microsoft SharePoint Portal Server. Each setting offers two or more options, which the table defines below along with a description of each setting and its options. Unless otherwise noted, the default setting is blank.

Setting	Options	Default Setting	Description
LogFileDir	Valid directory location	C:\inserver6\log	The location of the directory where Interact writes the ImageNow SharePoint plug-in error and debug log files.
LogLevel	0–2	1	Sets the level of detail written to the plug-in error and debug log files. The higher the number, the greater the amount of detail captured in the log files. 0 = Very little logging: only logs bad exceptions and errors. 1 = Slightly increased logging: logs when some of the main methods are called. 2 = Very verbose logging: gives a lot of information about different calls, current states of the data, and so on.
BridgeUserName	Valid ImageNow user		The username of the generic ImageNow bridge user account that is used to establish an initial session with ImageNow.
BridgeUserPwd	Password for the BridgeUserName user		The password of the generic ImageNow bridge user account.
MAServerName	Valid Message Agent server name	MessageAgent_Server	The Message Agent server name.
MAPort	Valid port number	6070	The port Message Agent uses to connect to Interact for SharePoint.

Setting	Options	Default Setting	Description
MABaseURL	Valid URL	http://localhost:6070/	The base URL for Message Agent.
ImageFileRootPath	Valid directory location	For SharePoint 2007: [C:]\\Program Files\\Common Files\\Microsoft Shared\\web server extensions\\12\\TEMPLATE\\LAYOUTS\\imagenow\\ For SharePoint 2010: [C:]\\Program Files\\Common Files\\Microsoft Shared\\web server extensions\\14\\TEMPLATE\\LAYOUTS\\imagenow\\	The file path to the location where images for ImageNow Interact are kept. Path directory names are case sensitive.
ImageRelativePath	Valid directory location	/_layouts/images/imagenow/	The relative location from which SharePoint Portal references its image files.
SearchGridWidth	Any integer	375	The width, in pixels, of the primary document search results grid.
SearchGridHeightMax	Any integer	400	The height, in pixels, of the primary document search results grid.
NumberSearchResults	0–500	50	The maximum number of search results displayed. This only applies to guest audience users. For other users, this maximum is set in the views settings in ImageNow.
DisplayDrawerCol DisplayDocTypeCol DisplayFolderCol DisplayTabCol DisplayF3Col DisplayF4Col DisplayF5Col DisplayPagesCol DisplayIsCheckedOutCol	1 0	DisplayDrawerCol=1 DisplayDocTypeCol=1 DisplayFolderCol=1 DisplayTabCol=1 DisplayF3Col=1 DisplayF4Col=1 DisplayF5Col=0 DisplayPagesCol=1 DisplayIsCheckedOutCol=1	The columns to display within the primary document search results grid. 1 = Display the column 0 = Hide the column

Setting	Options	Default Setting	Description
DocumentManagementEnabled	1 0	1	Enables or disables Document Management features. 1 = Enable Document Management features 0 = Disable Document Management features
UseCustomHeaders	1 0	1	Enables or disables Document Key headers. 1 = Enable Document Key headers 0 = Disable Document key headers
DrawerColHeader FolderColHeader TabColHeader Field3ColHeader Field4ColHeader Field5ColHeader DocTypeColHeader	Document Key header names you select	DrawerColHeader=DrawerCol FolderColHeader=FolderCol TabColHeader=TabCol Field3ColHeader=Field3Col Field4ColHeader=Field4Col Field5ColHeader=Field5Col DocTypeColHeader=DocType Col	Indicates the custom labels for the Document Key headers.
DocViewType	DEFAULT WEBNOW	DEFAULT	Indicates whether to display documents in their native viewer (Acrobat, Word, and so on) or within the WebNow viewer. Values are case sensitive. DEFAULT = Display documents in their native viewer. WEBNOW = Display documents in the WebNow viewer. **Note** You must have WebNow licenses available to use the WebNow option.
WebNowBaseURL	Valid URL address	http://localhost:8080/webnow	The WebNow URL

Setting	Options	Default Setting	Description
GuestViewINUserName GuestSearchINUserName	Valid user account names		The ImageNow user account names used for all SharePoint users that are a member of either the "Guest View" or "View" audiences (and are hence not individual ImageNow users).
GuestViewDocKey ViewDocKey	FOLDER TAB Field3 Field4 Field5	GuestViewDocKey=Field5 ViewDocKey=Field5	The document key searched for all SharePoint users that are members of either the "Guest View" or "View" audiences. The individual SharePoint user names are automatically searched for within the specified document key. Values are case sensitive.
GUEST_VIEW_AUD_NAME VIEW_AUD_NAME VIEWS_AUD_NAME WORKFLOW_AUD_NAME ADVANCED_AUD_NAME POWERUSER_AUD_NAME	Valid audience name	GUEST_VIEW_AUD_NAME=IN_GUEST_VIEW VIEW_AUD_NAME=IN_VIEW VIEWS_AUD_NAME=IN_VIEWS WORKFLOW_AUD_NAME=IN_WORKFLOW ADVANCED_AUD_NAME=IN_ADVANCED POWERUSER_AUD_NAME=IN_POWER_USER	Enter these values below # Audience Constants in the file. Values are case sensitive. The values are configured in the "Access and create a new audience" section. The format for each of the entries is: <PARAM_NAME> = <AUDIENCE_NAME> where <AUDIENCE_NAME> is a placeholder for the audience name created within SharePoint.
FormsAuthentication	TRUE FALSE	TRUE	If this setting is set to TRUE, Interact removes any text preceding a colon (the group) in the active username before sending it to ImageNow

Setting	Options	Default Setting	Description
DateFormat	Date format using the variables listed in the Description column.	W D/m/Y	Set the format to show dates, using the following variables: W - Day of week M - Month D - Date Y - Year m - for text month and M for number month **Note** Even though you set a field to display here, if the custom property is not set to display from the client, it does not show in SharePoint.

Index