

Perceptive Interact for Microsoft SharePoint

Installation and Setup Guide

Version 11.1

Compatible with ImageNow, version 6.7.x

 **perceptive**software

Written by: Product Documentation, R&D
Date: September 2016

© 2014 Perceptive Software. All rights reserved

CaptureNow, ImageNow, Interact, and WebNow are trademarks of Lexmark International Technology SA, registered in the U.S. and other countries. Perceptive Software is a stand-alone business unit within Lexmark International Technology SA. All other brands and product names mentioned in this document are trademarks or registered trademarks of their respective owners. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or any other media embodiments now known or hereafter to become known, without the prior written permission of Perceptive Software.

Table of Contents

- Overview5**
- Required components.....5**
 - Installer package 5
 - Software prerequisites 5
 - Licenses..... 6
 - Conditions for installation..... 6
- Installation and setup6**
 - Download Interact for Microsoft SharePoint components 6
 - Install Interact for Microsoft SharePoint..... 7
 - Install Perceptive Data Service 7
 - Configure MIME type in the SharePoint server..... 8
 - Define user privileges 8
 - Manage users..... 9
 - Create a generic user 9*
 - Create a bridge user 10*
 - Associate a SharePoint guest group with active directory group or user (domain controlled/local).. 10*
 - Allow contributors to add or edit Interact for Microsoft SharePoint web part..... 12*
 - Edit the properties file 12
 - Add the Interact for Microsoft SharePoint web part to the web part gallery..... 15
 - Add the web part to the portal site 16
 - Modify the instance-level properties..... 17
 - Host the URL for Help files..... 19
 - Define site parameters to refine document search..... 20
 - Use the connection pool framework 22
- Upgrade Interact for Microsoft SharePoint23**
 - Uninstall your existing installation 23*
 - Install Interact for Microsoft SharePoint version 11.1 24*
 - Install Perceptive Data Service version 11.1 25*
 - Upload web part 26*
- Troubleshoot Interact for Microsoft SharePoint26**
 - Unable to view the web part after restarting Message Agent service 27
 - Unable to modify the web part properties 27
 - Receiving invalid IIS authentication scheme error message 27

Receiving “Endpoint not found” error message 27

Uninstall option is not available..... 27

Unable to edit the inow6_sp properties file 27

The inserver6 folder does not get deleted after uninstalling Interact for Microsoft SharePoint..... 27

The PerceptiveDataServiceWebsite root folder does not get deleted after uninstalling Perceptive Data Service..... 27

Receiving “This action cannot be performed. Contact your administrator for assistance” message.... 28

Index.....29

Overview

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

Required components

Installer package

InteractSharepointSetup

You can install **InteractSharepointSetup** for SharePoint 2010 using the 64-bit installer package and 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

PerceptiveDataServiceSetup

You can install **PerceptiveDataServiceSetup** for SharePoint 2010 using the 64-bit installer package and 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 Interact for Microsoft SharePoint.

- Microsoft Office SharePoint Server (MOSS) 2007 or SharePoint Server 2010 (Standard, Enterprise, and Foundation)
- Microsoft .NET Framework, version 3.5 or higher (for SharePoint 2010) and version 2.0 or higher (for SharePoint 2007)
- Silverlight 4
- Message Agent Server, version 6.7
- Message Agent bridge user account. A bridge user account is required for Interact for Microsoft 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 bridge user” section.
- ImageNow Server, version 6.7
- Perceptive Data Service, version 11.1

Licenses

You are required to have the following licenses:

- ImageNow Server
- Message Agent Server
- Interact for Microsoft SharePoint

Conditions for installation

- Your SharePoint login ID must be identical to your ImageNow login ID, assuring proper operation of Interact for Microsoft SharePoint single sign-on capabilities. This is not applicable for guest users.
- You must have a common guest user login ID 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 Interact for Microsoft SharePoint
- Download Perceptive Data Service
- Install Interact for Microsoft SharePoint
- Install Perceptive Data Service
- Configure MIME type in the SharePoint server
- Define user privileges
- Manage users
- Edit the properties file to set the common properties for Interact for Microsoft SharePoint
- Modify the instance-level properties
- Add the Interact for Microsoft SharePoint web part to the web part gallery
- Add the web part to the portal site
- Host the URL for Help files
- Define site parameters to refine document search

Download Interact for Microsoft SharePoint components

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.
2. In the Product Downloads page, search for all downloadable items for the specific product and version you want to use. These files may include a product installer, product documentation, or set of supporting files.
3. Download the relevant files to a temporary directory on your computer.

Install Interact for Microsoft SharePoint

Before installation, you must verify that ImageNow Server and Message Agent are installed, up, and running. You must run this setup file as an administrator on the SharePoint server computer.

1. Right-click the installer and select **Run as administrator**.
2. In the **Welcome to the Perceptive Interact for Microsoft SharePoint** Installation Wizard page, click **Next**.
3. In 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. In the **SharePoint IIS Settings** page, click **Next**.

Note If you want the virtual directory location to be different from the default setting, click the **Change** button and specify the path.

5. In the **Destination Folder** page, if you want to change the destination folder, click **Change** and select the appropriate folder. To continue, click **Next**.
6. In the **Ready to Install the Program** page, click **Install**.
7. Optional. If the **Show the Windows Installer log** check box appears, you can select the check box to view the log file.
8. In the **Installation Wizard Completed** page, click **Finish**.
9. To grant permission to the user, 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**.
10. Modify the permissions of the **previewtemp** folder to allow full control access for every Interact for Microsoft SharePoint users. Every Windows or domain users of the SharePoint server (**Everyone**) must have full control access to the **previewtemp** folder.

Install Perceptive Data Service

To install the Perceptive Data Service, as a prerequisite, you must ensure that IIS (version 6, 7, or 7.5) is installed and configured on your computer. **In addition, Perceptive Data Service installer must be installed on the same SharePoint server where Interact for Microsoft SharePoint is installed and configured.** Perceptive Data Service works only on IIS. The installer always creates a new web site in IIS and hosts the Perceptive Data Service on the specified port.

Using this REST based data service, you can communicate with Message Agent to access your ImageNow content. To install the Perceptive Data Service that communicates with Message Agent server, perform the following procedure.

1. Right-click the installer and select **Run as administrator**.
2. In the **Welcome to the InstallShield Wizard for Perceptive Data Service** installer page, click **Next**.
3. In the **License Agreement** page, read the License Agreement, scroll to the bottom of the agreement, select **I accept the terms in the license agreement**, and then click **Next**.
4. In the **Port Configuration** page, under **Port used to publish this service**, provide a port number, and click **Next**. The default value is 7070.

Note The port number you are providing should not be used by any other web application in IIS. You must ensure that this port number is not blocked by the firewall.

5. In the **Ready to Install the Program** page, click **Install**.
6. In the **IninstallShield Wizard Completed** page, click **Finish**.

Note The Perceptive Data Service installation has unrestricted access by default. To restrict access to this deployment as per requirements, as an administrator you must edit the **clientaccesspolicy.xml** file present in the Perceptive Data Service web site's root directory to manage access privileges for different domains. To verify the Perceptive Data Service connection, you can hit the following URL from browser:
<http/ https>://<ipaddress/machine_name>:<port_number(7070)>/PerceptiveDataService/PerceptiveDataService.svc/test/<abcd>

Configure MIME type in the SharePoint server

You must configure the MIME type in the IIS server for SharePoint 2007 before you start Interact for Microsoft SharePoint. This is not required for SharePoint 2010.

To configure MIME type in the IIS6 server for SharePoint 2007:

1. Open the IIS Manager.
2. Navigate to the SharePoint site.
3. Right-click on the SharePoint site and from the menu, select **Properties**.
4. In the **SharePoint properties** dialog box, click the **HTTP Headers** tab.
5. Under **MIME types**, click the **MIME Types** button.
6. In the **MIME types** dialog box, click **New**.
7. In the **MIME Type** dialog box, perform the following substeps.
 1. Under **File name extension**, type **.xap**.
 2. Under **MIME type**, type **application/x-silverlight-app**.
 3. To perform an IIS reset, click **OK**.

Define user privileges

Interact for Microsoft SharePoint supports the following user types:

- ImageNow user
- Guest user

The following table shows which ImageNow functions are granted to the respective user types.

Feature	ImageNow User	Guest User
Search for a document	X	X
Route to workflow queue	X	
View documents	X	X
Download documents	X	X

Feature	ImageNow User	Guest User
Check in and check out documents	X	
Digitally sign documents	X	
Capture documents	X	X

Note As a guest user, you will be able to see the Capture tab and perform the Capture functions only if you have capture privileges on the drawer.



Manage users

- Create a generic user
- Create a bridge user
- Associate a SharePoint guest group with active directory group or user (domain controlled/local)
- Allow contributors to add or edit Interact for Microsoft SharePoint web part.


Create a generic user

You must create a generic user in SharePoint before adding privileges to it.

To create a generic user in SharePoint 2010:

1. In the **SharePoint Central Administration** home page, on the left pane, click **Application Management**.
2. In the **Application Management** page, under **Service Applications**, click **Manage service applications**.
3. In the **Service Applications** page, click **User Profile Service Application**.
4. In the **Manage Profile Service: User Profile Service Application** page, click **Manage User Profiles**.
5. In the **Manage User Profiles** page, click the **New Profile**  icon.
6. In the **Add User Profile** page, enter the relevant details.
7. Click the **Save and Close**  button.

To create a generic user in SharePoint 2007:

1. In the **SharePoint Central Administration** home page, on the left pane, click **Shared Services1**.
2. In the **Shared Services1** page, under **User Profiles and My Sites**, click **User Profiles and Properties**.
3. In the **User Profiles and Properties** page, click **Add User Profile**.
4. In the **Add User Profile** page, enter the relevant details.
5. Click the **Save and Close**  button.

Create a bridge user

You must create a user account within ImageNow to function as the bridge user between Interact for Microsoft SharePoint and the Message Agent. 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. Depending upon your authentication source, such as LDAP, your application administrator might need to establish the bridge account in that location.

To create a bridge user account in SharePoint 2010 or SharePoint 2007:

1. Create a user account in the system in Windows by selecting Start>Settings>Control Panel>User Accounts.
2. Create a user account within ImageNow to function as the bridge user within Interact for Microsoft SharePoint communication within Message Agent.
3. Give the user a user name and make a note of this name.
4. Make a note of the password you define for this user.

Note The username and password of the generic ImageNow bridge user account used to establish an initial session with ImageNow:

BridgeUserName=<username>

BridgeUserPwd=<password>

Associate a SharePoint guest group with active directory group or user (domain controlled/local)

You can associate a SharePoint guest group with an active directory group if you create an active directory using **Security** group type and not **Distribution** group type.

To create a guest group in SharePoint2010:

1. In the **SharePoint Site** home page, click **Site Actions** and in the list, select **Site Settings**.
2. In the **Site Settings** page, under **Users and Permissions**, click **People and Groups**.
3. Click **Groups**, click **New** and under **New**, click **New Group**.
4. In the **Name** box, type a name for the new group.
5. To grant permissions to the user group, select the relevant check box.
6. Click the **Create** button. A new guest user group is created.

To add a user to a guest group when SharePoint2010 is not hosted in a domain:

1. Create a user account in the system in Windows by selecting Start>Settings>Control Panel>User Accounts.
2. To add a guest user, select the newly created group, click **New** and select **Add users to this group**. Type a user name and grant necessary permissions, click **OK**.
3. Update the group name in the GuestUserGroupName field in the inow6_sp.properties file.

To add an active directory group or user to a SharePoint2010 guest group:

To associate existing active directory groups or users with a SharePoint guest group, you must create a guest user group by following the steps mentioned earlier.

After you have created a guest user group, perform the following procedure.

1. In the **SharePoint Site** home page, click **Site Actions** and in the list, select **Site Settings**.
2. In the **Site Settings** page, under **Users and Permissions**, click **People and Groups**.
3. In the **People and Groups** page, select the newly created guest user group.
4. In the right pane, click **New** down arrow and then click **Add users to this group**.
5. In the **Grant Permissions** dialog box, perform the following substeps.
 1. Under **Users/Groups**, type an active directory group or user name, and press **Check Names**.
 2. Click **OK**.
6. Update the group name in the GuestUserGroupName field in the **inow6_sp.properties** file.

Note You can associate multiple active directory groups or users with a SharePoint guest group. Active directories with nested groups and users are also granted guest user privileges.

To add a guest user to a group in SharePoint2007:

1. In the **SharePoint Site** home page, click **Site Actions** and in the list, select **Site Settings**, select **People and Groups**.
2. In the **People and Groups** page, click **New** and select **New Group**.
3. In the **New Group** page, enter the relevant details and save the details.
4. To grant permissions to the user group, select the relevant check box.
5. Click the **Create** button. A new user group is created.

To add a user to a guest group when SharePoint2007 is not hosted in a domain:

1. To add a guest user to this group, in the **People and Groups:<Group Name>** page, select the newly created group, click **New**, and select **Add users**. Type a user name and grant necessary permissions, click **OK**.
2. Update the group name in the GuestUserGroupName field in the **inow6_sp.properties** file.

To add an active directory group or user to a SharePoint2007 guest group:

To associate an existing active directory group or user with a SharePoint guest group, you must create a guest user group following the steps mentioned earlier.

Note The active directory group or user name should not have special characters.

After you have created a guest user group, perform the following procedure.

1. In the **SharePoint Site** home page, click **Site Actions** and in the list, select **Site Settings**, select **People and Groups**.
2. In the **People and Groups** page, select the newly created guest user group.
3. In the right pane, click **New** down arrow and then click **Add users to this group**.
4. In the **Grant Permissions** dialog box, perform the following substeps.

1. Under **Users/Groups**, type an active directory group or user name (without special characters), and press **Check Names**.
2. Click **OK**.
5. Update the group name in the GuestUserGroupName field in the **inow6_sp.properties** file.

Note You can associate multiple active directory groups or users with a SharePoint guest group. Active directories with nested groups and users are also granted guest user privileges.

Allow contributors to add or edit Interact for Microsoft SharePoint web part

Interact for Microsoft SharePoint web part should be visible to all contributors. For SharePoint 2010, you must grant permission to contributors to add and modify the web part.

To allow contributors to add or modify the web part:

1. From the **Start** menu, click **SharePoint 2010 Central Administration**.
2. Under **Application Management**, click **Manage web applications**.
3. Click the port where Interact for Microsoft SharePoint is installed. For example, SharePoint – 80.
4. In the menu bar, click **Web Part Security**.
5. In the **Security For Web Part Pages** window, in **Scriptable Web Parts** section, select **Allows contributors to add or edit scriptable Web Parts**.
6. Click **OK**.

Edit the properties file

The inow6_sp.properties file contains global configuration properties for the ImageNow web part used by the Microsoft SharePoint Portal Server. The following table provides definitions and setting options for the inow6_sp.properties configuration file. Unless otherwise noted, the default setting is blank.

1. Open the inow6_sp.properties file located in the **[drive:]<destination folder>\etc** directory and configure the following parameters.

Setting	Options	Default Setting	Description
LogFileDir	Valid directory location	Default setting is blank.	The location of the directory where Interact writes the ImageNow SharePoint plug-in error and debug log files. Example: [drive:]\\inserver6\\log

Setting	Options	Default Setting	Description
LogLevel	0-2	0	<p>Specifies the level the server uses to log errors for troubleshooting.</p> <p>Typically, you want to set minimal logging unless you are debugging an issue. If you increase the logging, make sure that you set the logging level back down after you finish debugging. Failure to do so can greatly affect performance and hard disk space.</p> <p>0 = Error.</p> <p>1 = Warning.</p> <p>2 = Information.</p> <p>1 through 2 = Logging is on. The higher the number, the more verbose logging. For example, 0 offers minimal logging, whereas 2 offers logging that offers the most information.</p>
BridgeUserName	Valid ImageNow user	Default setting is blank.	The username of the generic ImageNow bridge user account used to establish an initial session with ImageNow.
BridgeUserPwd	Password for the BridgeUserName user	Default setting is blank.	The password of the generic ImageNow bridge user account.
MaxUserCount		1	<p>Maximum number of connections should be decided based on the load requirements.</p> <p>For example, when MaxUserCount is 20, there must be 20 users (admin, and admin1-admin19). Also, the password for each user must be set same. The password is set at the BridgeUserPwd field.</p>
MAServerName	Valid Message Agent server name	MessageAgent_Server	The Message Agent server name.

Setting	Options	Default Setting	Description
MAPort	Valid port number	6070	The port Message Agent uses to connect to Interact for Microsoft SharePoint.
MABaseURL	Valid URL	Default setting is blank.	The base URL for Message Agent. For example, http://localhost:6070/
MATimeout (ms)		300000	The response time duration set for client to WCF service and WCF service to MA requests. You can change the default time duration (ms) as per load requirements.
ImageFileRootPath	Valid directory location	For SharePoint 2007: [drive:]\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS\imagenow\ For SharePoint 2010: [drive:]\Program Files\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE\LAYOUTS\imagenow\	The file path to the location where images for 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.
NumberSearchResults	0-500	50	The maximum number of search results displayed. This only applies to guest users. For other users, this maximum is set in the views settings in ImageNow.
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
WCFRESTServiceUrl		WCFRESTServiceUrl=PerceptiveDataService/PerceptiveDataService.svc	The location of the RestService file.
XAPFilePath		XAPFilePath=/_layouts/ClientBin/SilverlightInteractForSharepoint.xap	The location of the Silverlight component used to upload the web part.
SiteUrl		http://<ip_address>:<port_number>	
HelpFileUrlDomain		HelpFileUrlDomain=http://localhost/Help	The location of the Help folder.

- Restart the **World Wide Web Publishing** service on the SharePoint Server.
- Access the top-level site within SharePoint and add the **SilverlightInteractWebpart** web part to the SharePoint web part gallery, as explained in the following section.

Add the Interact for Microsoft 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:**
 - In the portal page, click **Site Actions** and in the list, select **Site Settings**.
 - In the **Site Settings** page, under **Galleries**, click **Web parts**.
 - In the **Web Part Gallery** page, in the main toolbar, click the **Documents** tab and select the **Upload Document** option.
 - Browse to **[drive:]\inserver6\etc\SilverlightInteractWebpart.webpart** and click **OK**.
 - In the **Web Part Gallery** page, click the **Edit** tab and click **Save** to save the settings.
 - Confirm that the **SilverlightInteractWebpart.webpart** entry now appears in the Web Part Gallery list.
- For SharePoint 2007:**
 - Locate the **SilverlightInteractWebpart.webpart** file, located in the **[drive:]\inserver6\etc** directory on the SharePoint Server.
 - In the upper-right portion of the portal page, click **Site Actions** and select **Site Settings** in the list.
 - If you are currently working with the top-level site for the shared service, skip to the next step. If not, in the **Site Settings** page, in the **Site Collection Administration** column, click **Goto top level site settings**.
 - In 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, in the **Top-level Site Administration** page, in the **Site Collection Galleries** section, click **Manage Web Part gallery**.
 6. In 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 **SilverlightInteractWebpart.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 then click **OK**.
- Note** Do not modify the **Name** or **Title** fields.
10. Confirm that the **SilverlightInteractWebpart.webpart** entry now appears in the **Web Part Gallery** list. If you have set all the properties properly on previewing the web part, you will be able to see an empty web part.

Add the web part to the portal site

1. Browse to the portal site to which you want to add the Interact for Microsoft 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. In the portal page, click **Site Actions** and in the list, select **Edit Page**.
 2. In the page, click **Add a Web Part**.
 3. In the **Categories** list, select the folder containing the web part and select **Perceptive Interact for Microsoft SharePoint**.
 4. Under **About the Web Part**, in the **Add Web Part to list**, select the appropriate option.
 5. Click **Add**.
 6. Verify that the Interact for Microsoft SharePoint web part is working within the current page.
 - **For SharePoint 2007:**
 1. In the portal 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. Under **Web Part List**, browse to and select **Perceptive Interact for Microsoft SharePoint**. The associated **Home Gallery**, located above the web part list, is selected in the collections list. If applicable, click **Next** to navigate to the **Perceptive Interact for Microsoft SharePoint** web part.
 5. Drag the Interact for Microsoft SharePoint web part to the location you want in the page.
 6. Above the **Add Web Parts** pane, click **Exit Edit Mode**.
 7. Verify that the Interact for Microsoft SharePoint web part is working within the current page.

Modify the instance-level properties

The Site Administrator or the Page Administrator can configure the instance-level properties. The Site Administrator can create one or more Page Administrators. The secondary Site Administrator will not be able to modify instance-level properties.

Configure alternate access mapping in SharePoint to grant public access to the SharePoint site, before modifying the instance-level properties.

To modify the instance-level properties, open Interact for Microsoft SharePoint using Internet Explorer and perform the following procedure.

1. Navigate to the page where the Interact for Microsoft SharePoint web part is available.
2. On the top-right corner, click **Perceptive Interact for Microsoft SharePoint Web Part Menu** icon, select **Edit Web Part** (in SharePoint 2010) or **Modify Shared Web Part** (in SharePoint 2007).
3. In the right pane, expand **Perceptive Custom Properties** category, modify the fields as necessary, and click **OK**. Refer to the following table for more information on the fields.

Setting	Options	Default Setting	Description
Page Administrator		Default setting is blank.	A SharePoint user who can view and modify the web part properties. The user must have the Contribute permission in the SharePoint server. Note You may provide multiple user IDs separated by commas. For example, admin1, admin2, admin3
UseCustomHeader	1 0	1	Enables or disables Document Key headers. 1 = Enable Document Key headers 0 = Disable Document key headers If you enable the Document Key headers but leave a field blank, the default value is saved.
DocumentManagement Enabled	1 0	1	Enables or disables Document Management features. 1 = Enable Document Management features 0 = Disable Document Management features

Setting	Options	Default Setting	Description
DisplayCaptureTabForGuests		DisplayCaptureTabForGuests=<0 or 1>	The guest users may or may not have the privilege to view the Capture tab, depending on these settings.
DrawerColHeader Field1ColHeader Field2ColHeader Field3ColHeader Field4ColHeader Field5ColHeader DocTypeColHeader	Document Key header names you select	DrawerColHeader=Drawer Field1ColHeader=Field1 Field2ColHeader=Field2 Field3ColHeader=Field3 Field4ColHeader=Field4 Field5ColHeader=Field5 DocTypeColHeader=DocTypeCol	Indicates the custom labels for the Document Key headers. Note Applicable to the Capture tab only.
DocumentTypeList		Default setting is blank.	The Document Type List as configured in ImageNow Server. While capturing documents, the user is able to select only the document types available under the configured Document Type List. If this field is left blank, the user is able to select all the document types. Note Does not support multiple entries. Enter one value only.
WorkflowQueue		Default setting is blank.	This should be same as the workflow queue configured in ImageNow Server. If this field is left blank, while capturing a document, the captured document is not sent to any workflow queue. Note Does not support multiple entries. Enter one value only.
GuestViewINUserName		guest bridge user	All SharePoint users who are members of the "Guest View" group use the ImageNow user account name. They are not individual ImageNow users.

Setting	Options	Default Setting	Description
GuestViewName		Single guest view name configured in ImageNow Server	This should be same as the single guest view name configured in ImageNow Server.
GuestUserGroupName		Guest group name configured in SharePoint server	The GuestUserGroupName should be same as the guest group name configured in SharePoint server.
VSL Constraints		Default setting is blank.	VSL texts used to define search constraints. Refer to the "Define site parameters to refine document search" section.

Host the URL for Help files

To access the Help files for Interact for Microsoft SharePoint, perform the following steps:

1. Publish the Web Help provided by the installer, located in **[drive:]\inserver6\Help\en\Sharepoint**.
2. Update the config file for the inow6_sp.properties for Interact for Microsoft SharePoint with the published domain name.

Publish the Help files in IIS

- **Using SharePoint 2010:**

1. Go to Windows> Run and go to IIS by typing inetmgr in the **Run** window.
2. Select any website or intranet site where you want to publish the Help files.
3. Right-click the selected site and click **Add Virtual Directory**.
4. In the **Add Virtual Directory** form, under **Alias**, enter the alias name.
5. Under **Physical path**, browse to **[drive:]\inserver6\Help\en\Sharepoint**.
6. Click **OK**.
7. Note the domain name under which you published the Help and the virtual directory.
8. To get the URL for the virtual directory, right-click the virtual folder (alias name) in IIS, select **Manage Virtual Directory** and click **Browse**. You can view the URL (for example, <http://localhost:<port number>>) in the address bar of the browser.

- **Using SharePoint 2007:**

1. Go to Windows> Run and go to IIS by typing inetmgr in the **Run** window.
2. Select any website or intranet site where you want to publish the Help files.
3. Right-click the selected site, click **New**, and click **Virtual Directory**.
4. In the **Virtual Directory Creation Wizard** page, click **Next**.
5. In the **Virtual Directory Alias** page, under **Alias**, enter the alias name, and click **Next**.

6. In the **Web Site Content Directory** page, under **Path**, browse to the location of the help files ([drive:]inserver6\help\en\Sharepoint) and click **Next**.
7. In the **Virtual Directory Access Permissions** page, select the **Read** check box and click **Next**.
8. Click **Finish**.
9. Note the domain name under which you published the Help and the virtual directory.
10. To get the URL for the virtual directory, right-click the virtual folder (alias name) in IIS, select **Manage Virtual Directory** and click **Browse**.

Update the config file

- **Using SharePoint 2010:**
 1. Under [drive:]inserver6\etc, open the inow6_sp.properties file.
 2. In the inow6_sp.properties file, create the HelpfileUrlDomain entry.
 3. Add the URL for the virtual directory as the HelpfileUrlDomain entry. For example, http://localhost:1234
- **Using SharePoint 2007:**
 1. Under [drive:]inserver6\etc, open the inow6_sp.properties file.
 2. In the inow6_sp.properties file, create the HelpfileUrlDomain entry.
 3. Add http://localhost:1234/SPInteractHelp as the HelpfileUrlDomain entry.

Define site parameters to refine document search

You can refine document search in Interact for Microsoft SharePoint by binding site parameters to a particular view and filter name in the instance level properties file. This is an optional feature, which all ImageNow users can use. Only an ImageNow Administrator, who has prior knowledge of VSL before implementing this feature, must perform this procedure. This feature is not available in the Foundation server of SharePoint 2010.

Use the following instructions to either bind the site parameters to the particular view and constraint ID in SharePoint 2010 or SharePoint 2007.

- **Using SharePoint 2010:**
 1. In the **SharePoint Central Administration** home page, on the left pane, click **Application Management**.
 2. In the **Application Management** page, under **Service Applications**, click **Manage service applications**.
 3. In the **Service Applications** page, click **User Profile Service Application**.
 4. In the **Manage Profile Service: User Profile Service Application** page, click **Manage User Properties**.
 5. Under **Sub-type**, you can view the Default User Profile Sub-type.
Note The property for the sub type is considered for binding.
 6. Under the **Default User ProfileSubtype**, click **New Property** to add new properties to the subtype.
 7. Under **User Profile**, enter a value for a property.

8. Verify that the property name specified for binding in the `inow6_sp.properties` file for Interact for Microsoft SharePoint exactly matches the display name of the particular property defined in the SharePoint server.
- **Using SharePoint 2007:**
 1. In the **SharePoint Central Administration** home page, on the left pane, click **Shared Services1**.
 2. In the **Shared Services1** page, under **User Profiles and My Sites**, click **User Profiles and Properties**.
 3. In the **User Profiles and Properties** page, under **User Profile Properties**, click **Add profile property**.
 4. In the **Add User Profile Property** page, enter the relevant details and save the details.
 5. To verify that the new profile property has been added, click **View Profile Properties**.
Note You can view the new property under **Custom Properties**.
 6. To modify the properties, click **Edit User Profile**.
 7. In the **Edit User Profile** page, edit the properties and save the details.
 8. Verify that the property name specified for binding in the `inow6_sp.properties` file for Interact for Microsoft SharePoint exactly matches the display name of the particular property defined in the SharePoint server.

You may define site parameters using VSL text to associate with any view, or view-filter combination. VSL associated with a view is always executed for the view and any of its filters, unless specifically overridden by another view-filter combination. You can also use SharePoint data on the right side of the VSL operator. For example, `[field4] = {{'Food Habit'}}`.

The following table displays whether the search results are view-executable or filter-executable, depending on whether you bind the constraints to the view or filter.

View VSL	Filter VSL	View executable	Filter executable
Absent	Absent	Without VSL	Without VSL
Absent	Present	Without VSL	With Filter's VSL
Present	Absent	With View's VSL	With View's VSL
Present	Present	With View's VSL	With Filter's VSL

The following is an example of VSL constraint definition to be used for binding site parameters. You must follow this syntax to define the search constraints.

```
# view 1 View and Filter VSL present
constraint.1.View=view1\n
constraint.1.View.vsl=[field1] = {{'Department'}}\n
constraint.1.View.filter.1=view1 filter\n
constraint.1.View.filter.1.vsl=[field3] = 'field3 value'

# view 2 View VSL present Filter VSL is not present
```

```
constraint.2.View=view2\n
constraint.2.View.vsl={CompositeProp}.{StringCustomProp} = 'String Composite
Property Value'

# view 3 Complex VSL
constraint.2000.View=view3\n
constraint.2000.View.vsl=[docType] = 'Doc type value1' AND [field3] contains
'field3 value' AND [field4] = {{'Hair Color'}}

# view 4 View VSL is not present Filter's VSL is present
constraint.4.View=view4\n
constraint.4.View.filter.1=view4 filter\n
constraint.4.View.filter.1.vsl=[field1] = 'field1 value'
```

Note Make sure that the View or Filter constraint name is unique for a particular view or filter. In this example, 'Department' and 'Hair Color' are SharePoint user properties. The following property types are not supported.

- Multi-value string
- Year
- Time zone
- html

Use the connection pool framework

You can create a connection pool by setting some attribute values in the ImageNow properties file (refer to the following table for more details). All ImageNow users can use this feature.

Connection pooling is a framework used for sharing the Message Agent sessions among requested clients. By using a connection pool, you maintain a cache of Message Agent connections, which you can reuse for future requests to the Message Agent. Connection pool enhances the performance of executing commands on Message Agent and saves you the time and trouble of creating a new connection to the Message Agent each time.

You can set various parameters, such as the number of maximum connections to make sure, the connection pool works according to the environment.

Connection pool guarantees returning the least loaded session object on every request.

Setting	Options	Default Setting	Description
BridgeUserName	Valid ImageNow user	Default setting is blank.	The username of the generic ImageNow bridge user account used to establish an initial session with ImageNow. This should be set to "admin".
BridgeUserPwd	Password for the BridgeUserName user	Default setting is blank.	The password of the generic ImageNow bridge user account.

Setting	Options	Default Setting	Description
MaxUserCount		1	<p>Maximum number of connections should be decided based on the load requirements.</p> <p>For example, when MaxUserCount is 20, there must be 20 users (admin, and admin1-admin19). Also, the password for each user must be set same. The password is set at the BridgeUserPwd field.</p>

Upgrade Interact for Microsoft SharePoint

Interact for Microsoft SharePoint and Perceptive Data Service installer does not provide any option for upgrading the installation. You have to manually uninstall the old version and install the new version. You must install the Message Agent server and the Interact for Microsoft SharePoint/Perceptive Data Service installations on different machines.

Uninstall your existing installation

Uninstall Interact for Microsoft SharePoint

You must uninstall your existing Interact for Microsoft SharePoint installation using **Control Panel**.

1. Click the **Start** button, click **Control Panel**, click **Programs**, and then click **Programs and Features**.
2. Select **Interact for Microsoft SharePoint** and then click **Uninstall**.
3. In the **Programs and Features** dialog box, click **Yes**.
4. Navigate to the installation drive and make a backup of the **inow6_sp.properties** file for future reference. Manually delete the **inserver6** folder.
5. Log in to the SharePoint site as an administrator.
6. In the SharePoint home page, click **Site Actions** and then click **Site Settings**.
7. Under **Galleries**, click **Web parts**.
8. In the **All Web Parts** page, verify that **SilverlightInteractWebpart.webpart** is deleted. If not, delete the web part. Additionally go to the pages where the previous web part was referred. Edit these pages and delete the previously referred web part.

Uninstall Perceptive Data Service (if applicable)

You must uninstall your existing Perceptive Data Service installation using **Control Panel**.

1. Click the **Start** button, click **Control Panel**, click **Programs**, and then click **Programs and Features**.
2. Select a program, and then click **Uninstall**.
3. In the **Programs and Features** dialog box, click **Yes**.
4. Navigate to **[C:]Windows\assembly** folder, right-click **WCFRestServiceForSP**, select **Uninstall**.

5. Navigate to the IIS root folder. Typically, the path is [C:]inetpub\wwwroot.
6. In the IIS root folder, search for **PerceptiveDataServiceWebsite** folder and delete it.

Uninstall WCFRESTServiceForSP (applicable only for Interact for Microsoft SharePoint 6.7)

You have to uninstall **WCFRESTServiceForSP** manually.

1. On the **Start** menu, point to **All Programs**, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**.
2. In the left pane, expand the SharePoint server name, expand the **Sites** list, and then expand the site where Interact for Microsoft SharePoint is installed.
3. Under the site where Interact for Microsoft SharePoint is installed, expand **_vti_bin**, right-click **WCFRESTServiceForSP**, and select **Explore**.
4. Delete the **WCFRESTServiceForSP** folder.
5. Navigate to GAC ([C:]Windows\assembly), right-click **WCFRestServiceForSP**, click **Uninstall**.

Install Interact for Microsoft SharePoint version 11.1

Run the installer

You must run this setup file as an administrator on the SharePoint server computer. Before installation, delete the temporary files and cookies of the browser. Restart the IIS, and if possible, restart the SharePoint database and the SharePoint processes.

1. Right-click the installer and select **Run as administrator**.
2. In the **Welcome to the Installation Wizard for Perceptive Interact for Microsoft SharePoint** page, click **Next**.
3. In 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. In the **SharePoint IIS Settings** page, click **Next**.

Note If you want the virtual directory location to be different from the default setting, in case you are not installing Interact for Microsoft SharePoint in the default SharePoint website (port: 80), click the **Change** button and specify the path.

5. In the **Destination Folder** page, if you want to change the destination folder, click **Change** and select the appropriate folder. To continue, click **Next**.
6. In the **Ready to Install the Program** page, click **Install**.
7. Optional. If the **Show the Windows Installer log** check box appears, you can select the check box to view the log file.
8. In the **Installation Wizard Completed** page, click **Finish**.
9. To grant permission to the user, 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.

10. Modify the permissions of the **previewtemp** folder to allow full control access for every Interact for Microsoft SharePoint users. Every Windows or domain users of the SharePoint server (**Everyone**) must have full control access to the **previewtemp** folder.

Install Perceptive Data Service version 11.1

To install the Perceptive Data Service, as a prerequisite, you must ensure that IIS (version 6, 7, or 7.5) is installed and configured on your computer. **In addition, Perceptive Data Service installer must be installed on the same SharePoint server where Interact for Microsoft SharePoint is installed and configured.** Perceptive Data Service works only on IIS. The installer always creates a new web site in IIS and hosts the Perceptive Data Service on the specified port.

Using this REST based data service, you can communicate with Message Agent to access your ImageNow content. To install the Perceptive Data Service that communicates with Message Agent server, perform the following procedure.

Run the installer

1. Right-click the installer and select **Run as administrator**.
2. In the **Welcome to the InstallShield Wizard for Perceptive Data Service** installer page, click **Next**.
3. In the **License Agreement** page, read the License Agreement, scroll to the bottom of the agreement, select **I accept the terms in the license agreement**, and then click **Next**.
4. In the **Port Configuration** page, under **Port used to publish this service**, provide a port number, and click **Next**. The default value is 7070.

Note The port number you are providing should not be used by any other web application in IIS. You must ensure that this port number is not blocked by the firewall.
5. In the **Ready to Install the Program** page, click **Install**.
6. In the **InstallShield Wizard Completed** page, click **Finish**.

Update inow6_sp.properties configuration file

You must ensure that the port number used for Perceptive Data Service is open before performing the following procedure.

1. On the **Start** menu, point to **All Programs**, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**.
2. In the left pane, expand the SharePoint localhost, and then expand the **Sites** list. Verify that a website named **Perceptive Data Service Website** is created that includes a service named **PerceptiveDataService** and a **clientaccesspolicy.xml** file.
3. In the left pane, select **Perceptive Data Service Website**.
4. In the right pane, at the bottom of the screen, click the **Content View** tab.
5. In the right pane, right-click **clientaccesspolicy.xml**, click **Browse**. Verify that the xml file is opened. Close the browser. For example, if your SharePoint site is available in **perceptivedemo.com** then hit the following URL to ensure the connection with Perceptive Data Service:
<http/https>://perceptivedemo.com:<portnumber>/clientaccesspolicy.xml
6. In the left pane, select **PerceptiveDataService**.
7. In the right pane, at the bottom of the screen, click the **Content View** tab.

8. In the right pane, right-click **PerceptiveDataService.svc**, click **Browse**. Verify that the service is up and running. To test the connection of the service, enter some text (**/test/<abcd>**) as the additional parameter of the URL link. You must add the text (except special characters) so that the URL address is pointing to the following format. The texts within paranthesis <> is variable:
`<http/https>://
<ipaddress/machine_name>:<port_number(7070)>/PerceptiveDataService/PerceptiveDataService.svc/test/<abcd>`
9. Open the **inow6_sp.properties** configuration file, search for the **SiteUrl** field, and paste the URL in the following format: **SiteUrl=<ipaddress/machine_name>:<port_number(7070)>/**.
For example, if your SharePoint site is available in **perceptivedemo.com** then
SiteUrl=<perceptivedemo.com>:<port_number(7070)>/.
10. Enter other details in relevant fields and save the **inow6_sp.properties** file.

Note The Perceptive Data Service installation has unrestricted access by default. To restrict access to this deployment as per requirements, as an administrator you must edit the **clientaccesspolicy.xml** file present in the Perceptive Data Service web site's root directory to manage access privileges for different domains. To verify the Perceptive Data Service connection, you can hit the following URL from browser:
`<http/https>://<ipaddress/machine_name>:<port_number(7070)>/PerceptiveDataService/PerceptiveDataService.svc/test/<abcd>`

Upload web part

1. Log in to the SharePoint site as an administrator.
2. In the SharePoint home page, click **Site Actions** and then click **Site Settings**.
3. Under **Galleries**, click **Web parts**.
4. In the **All Web Parts** page, click **Documents** and click **Upload Document**.
5. In the **Upload Web Part** dialog box, click **Browse**, browse to the [*drive:*]\inserver6\etc folder, select the **SilverlightInteractWebpart.webpart** file, and click **Open**.
6. In the **Web Part Gallery** dialog box, in the **Group** list, select **Default Web Parts**, click **Save**. The uploaded web part must now appear in the web part gallery.
7. Navigate to the SharePoint page where you want to upload the web part, click **Edit** icon.
8. On the toolbar, click **Insert** and then click **Web Part**.
9. Under **Categories**, select the category that contains the uploaded web part. For example, **Default Web Parts**.
10. Click **Add**.
11. Click the **Save** icon.

Note Open the **inow6_sp.properties** configuration file and search for the entry that mentions the .xap file path (XAPFilePath). You must update the query parameter appearing at the end of the .xap file path with the latest build number as shown in bold text and angle brackets in the following example:
XAPFilePath=/_layouts/ClientBin/SilverlightInteractForSharepoint.xap?version=10.1.0.<**56**>

To see how to add the web part to a portal site, refer to the "Add the web part to the portal site" section.

Troubleshoot Interact for Microsoft SharePoint

For any functional issue, use the information provided in this section to troubleshoot the Interact for Microsoft SharePoint application.

Unable to view the web part after restarting Message Agent service

After restarting the Message Agent service, navigate to the IIS manager and recycle Perceptive Data Application Pool. Then restart the Perceptive Data Service web site.

Unable to modify the web part properties

Ensure that you are using Internet Explorer as your browser.

For Internet Explorer, version 10, change the Browser Mode to Internet Explorer 10 Compatibility View.

Receiving invalid IIS authentication scheme error message

In https mode, when attempting to browse PerceptiveDataService.svc file, if the user receives an error stating that the IIS authentication scheme is invalid, change the authentication of the Perceptive Data Service web site as well as the service. In IIS, keep the Anonymous Authentication as Enabled and others as Disabled.

Receiving “Endpoint not found” error message

When attempting to browse PerceptiveDataService.svc file from IIS, if the user receives an “Endpoint not found” message, do the following to check the connection.

Enter some text (/test/<abcd>) as the additional parameter of the URL link. You must add the text (except special characters) so that the URL address is pointing to the following format. The texts within paranthesis <> is variable.

For example, `http://localhost:7070/PerceptiveDataService/PerceptiveDataService.svc/test/<abcd>`

Uninstall option is not available

When upgrading the installation, if the uninstall option is not available for a particular application, you must uninstall your existing installation using Control Panel.

1. Click the **Start** button, click **Control Panel**, click **Programs**, and then click **Programs and Features**.
2. Select a program, and then click **Uninstall**.
3. In the **Programs and Features** dialog box, click **Yes**.

Unable to edit the inow6_sp properties file

After installing Interact for Microsoft SharePoint, if you are unable to edit the inow6_sp properties file, open the IIS Manager and restart the IIS server.

The inserver6 folder does not get deleted after uninstalling Interact for Microsoft SharePoint

Manually delete the inserver6 folder.

The PerceptiveDataServiceWebsite root folder does not get deleted after uninstalling Perceptive Data Service

Manually delete the PerceptiveDataServiceWebsite folder from IIS root directory.

Receiving “This action cannot be performed. Contact your administrator for assistance” message

For more information on the specific error, review the log file present in the installation directory of Interact for Microsoft SharePoint.

Note If Perceptive Data Service is down, the log file is not generated.

Index

add	
the Interact for Microsoft SharePoint web part to the web part gallery	15
the web part to the portal site	16
configure	
MIME type in the SharePoint server.....	8
connection pool framework	
use	22
define	
site parameters to refine document search ..	20
user privileges	8
download	
Interact for Microsoft SharePoint	6
install	
Interact for Microsoft SharePoint	7
Perceptive Data Service	7
Installing ImageNow.....	5
Interact for Microsoft SharePoint	
download	6
install	7
troubleshoot	26
uninstall	23
manage	
users.....	9
modify	
the instance-level properties.....	17
the properties file	12
Perceptive Data Service	
install	7
troubleshoot	
Interact for Microsoft SharePoint.....	26
uninstall	
Interact for Microsoft SharePoint.....	23
URL for Help files	
host	19
users	
manage	9
privileges	8