

Xerox[®] ConnectKey[™] for SharePoint[®] SharePoint Technical Brief



Contents

- 3 Solution Overview
- 4 Supported SharePoint Environments
- 4 When to Use the ConnectKey SharePoint Web Service
- 4 Where to Find the ConnectKey Web Service
- 5 Security
- 6 ConnectKey for SharePoint System Environment
- 7 Prerequisites
- 7 How to Install
- 7 Frequently Asked Questions

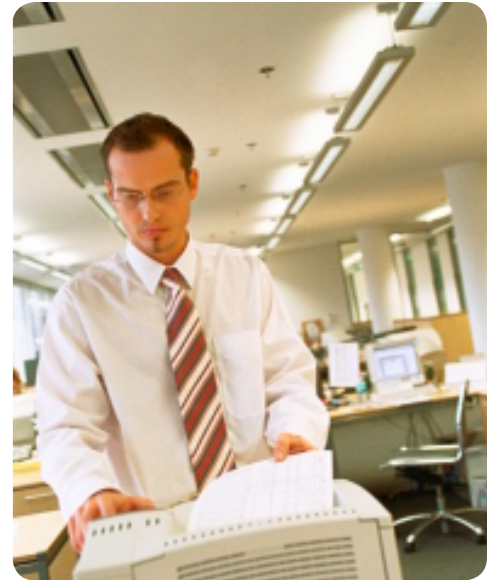
Solution Overview

Xerox® ConnectKey™ for SharePoint® is a middleware solution that enables end users to scan directly from a Xerox® Extensible Interface Platform® enabled Multifunction Printer (MFP) to network folders or to Microsoft® SharePoint. From an administration perspective, the goal of ConnectKey for SharePoint is to simplify and mitigate the IT burden associated with configuring and maintaining workflows. ConnectKey for SharePoint interrogates the existing network folder and SharePoint environment allowing for automated configuration of desired scan workflows. Simply select a target folder or library and ConnectKey for SharePoint will configure the required index fields with appropriate label and data types (string, pick list, etc). If users authenticate at the MFP, ConnectKey for SharePoint can check user permissions prior to filing the document in a SharePoint library or to a network folder. With respect to ongoing workflow maintenance, ConnectKey for SharePoint automates the entire process. If a SharePoint administrator adds an index field or adds/removes a value within a pick list, ConnectKey for SharePoint will automatically reflect these changes to existing workflows at the MFP.

In addition to the simplified workflow setup and automated mirroring of network folder and SharePoint environments, ConnectKey for SharePoint enables users to dynamically browse each environment. For some business processes, storing to static file locations might be appropriate. However, where more flexibility is required, ConnectKey for SharePoint can do more by allowing the end users to browse through SharePoint libraries and network folders at the MFP's local user interface in order to put their files where they want them.

In addition, the solution provides Scan-to-Home capabilities with network folders and Scan-to-MySites with SharePoint. With Scan-to-Home, ConnectKey for SharePoint easily integrates with Active Directory LDAP to retrieve a user's home directory attribute. For Scan-to-MySites, ConnectKey for SharePoint leverages existing MySites infrastructure already contained within SharePoint. With built in Active Directory user authentication, setup from the ConnectKey Process Designer to create a Scan-to-Home button for network folders or the Scan-to-MySites button for SharePoint is quick and easy to configure.

ConnectKey for SharePoint includes capabilities that get you from paper to searchable PDFs in just a few simple steps. Digital documents can be in easily searchable formats and have important indexing data associated with them so they can be easily found and identified. Any document can be made fully text searchable using ConnectKey for SharePoint's OCR engine. ConnectKey for SharePoint further enhances your ability to scan to other file formats, including Microsoft Office file formats docx and xls. In addition to these searchable file types, you can also scan to formats like JPG, TIFF and PDF/A.



Supported SharePoint® Environments

- Microsoft® Office SharePoint Server (MOSS) and Windows® SharePoint Services 3.0 (WSS)1—2007
- Microsoft SharePoint Foundation and Microsoft SharePoint Server¹—2010
- Microsoft SharePoint¹—2013

To provide ConnectKey™ for SharePoint's unparalleled simplicity and MFP connectivity to SharePoint, a programmatic exchange between ConnectKey and SharePoint must exist. To this end, Microsoft has provided a set of interfaces that allows for basic integration with SharePoint 2010 and SharePoint 2013. This is known as the "Microsoft web service" interface. However, in some cases such as with SharePoint 2007 or when expected functionality exceeds the Microsoft web service, a purposefully built "ConnectKey web service" must be installed on the target SharePoint server.



When to Use the ConnectKey SharePoint Web Service

The Xerox® ConnectKey web service is required for SharePoint 2007. The ConnectKey-provided web service must be installed on the target SharePoint 2007 server. This web service is the sole gateway that enables bidirectional communication that delivers integration with SharePoint as well as the ability to upload scanned documents.

For SharePoint 2010, it is recommended that the Xerox® ConnectKey web service be installed on the target SharePoint Server. While the use of the Xerox® ConnectKey web service is optional with SharePoint 2010, it provides full Xerox® ConnectKey functionality without limitation. With SharePoint 2010 and SharePoint 2013, Xerox® ConnectKey can be configured to use the native Microsoft web service. When using the native Microsoft web service, the following limitations exist:

- File size is limited to 200 MB
- Impersonation is not supported—owner of the document will be set to a generic SharePoint service account and not an authenticated user who scanned document
- Support for managed metadata fields is not possible

These limitations do not exist when using the Xerox® ConnectKey-provided web service.

This summarizes the web service deployment options:

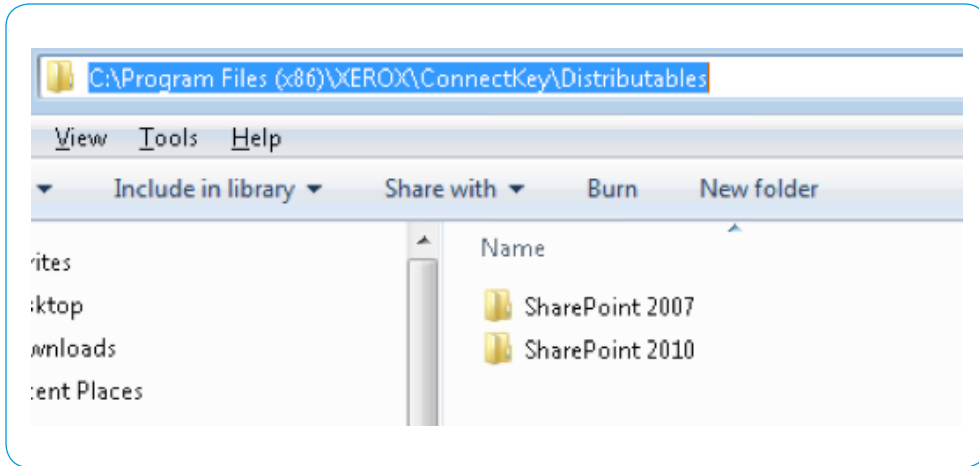
SharePoint Version	Native MS Web Service	Xerox® ConnectKey Web Service
2007 MOSS and WSS	No	Yes
2010 Foundation and Server	Yes	Yes (preferred)
2013 MS SharePoint	Yes	No

Where to Find the ConnectKey Web Service

After successful installation of Xerox® ConnectKey for SharePoint, the default location of the SharePoint web service is <INSTALL_DIRECTORY>\Distributables.

You will find two subfolders, SharePoint 2007 and SharePoint 2010.

¹ConnectKey for SharePoint supports single server SharePoint environments with an on premise install. SharePoint deployments with more than one server (e.g., a server farm) are not supported by Xerox® ConnectKey for SharePoint.



32-bit and 64-bit options are available for SharePoint® 2007:

- SPS2007WebService.exe (for SharePoint 2007 32-bit Operating System)
- SPS2007WebService_64.exe (for SharePoint 2007 64-bit Operating System)

SharePoint 2007 web service: The SharePoint 2007 web service allows routing documents and list items to Microsoft® SharePoint 2007. The component was designed for use with Microsoft Office SharePoint Server 2007 and Windows® SharePoint Services 3.0 (each one hereafter referred to as SharePoint 2007 Server). For the component to work properly, you should install the web service on the SharePoint 2007 Server machine.

There is a 64-bit installer file for 2010:

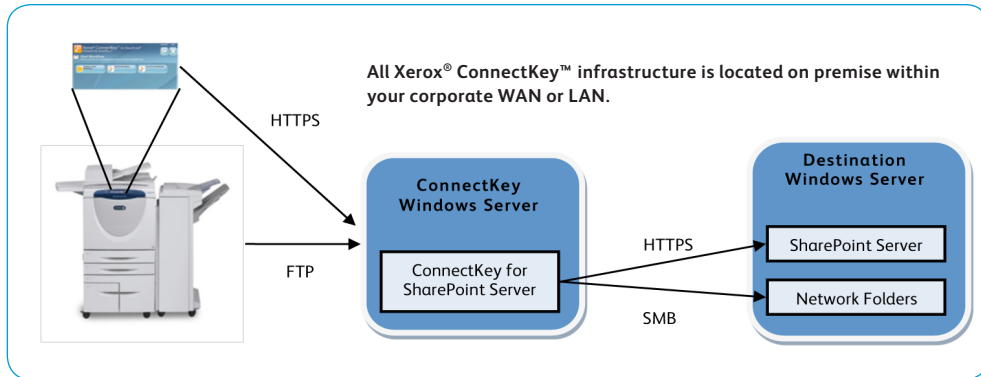
- SharePoint2010WebService(64).exe (for SharePoint 2010 64-bit Operating System)

SharePoint 2010 web service: The SharePoint 2010 web service allows routing documents and list items to Microsoft® SharePoint 2010. The component was designed for use with Microsoft SharePoint Foundation 2010 and Microsoft SharePoint Server 2010 (each one hereafter referred to as SharePoint 2010 Server). The SharePoint 2010 route/eConnector component allows users to store documents and list items into Microsoft SharePoint 2010. For the component to work properly, you should install the web service on the SharePoint 2010 Server machine.

Security

Once installed, configured and operational, Xerox® ConnectKey™ for SharePoint operates as part of a system that is composed of the following elements:

- The Xerox® MFPs that capture and transmit scanned documents to Xerox® ConnectKey for SharePoint
- The Xerox® ConnectKey for SharePoint application
- The destination server, either MS SharePoint or Windows folders



ConnectKey™ for SharePoint® System Environment

The majority of this system is comprised of components that are part of your existing network environment and is therefore protected by the information security measures that you already have in place. For most customers, when considering the security of this system, the primary concern will be the threat of unauthorized access to stored data.

Documents scanned at the MFP move directly to the Xerox® ConnectKey for SharePoint server. While on the MFP prior to transmission, they are encrypted; once they have been transferred, they are deleted. (More information on Information Assurance and Xerox® MFPs can be found at www.xerox.com/security. Click on the “Product Security” link.) Documents are transferred to the Xerox® ConnectKey for SharePoint application via FTP using an FTP server that is integrated with the ConnectKey for SharePoint application.² The final FTP location is housed on a PC/Server that can only be accessed by those with administrator credentials. In addition, the FTP transfer from the MFP to the ConnectKey for SharePoint server relies on a ConnectKey specific service account as identified by the ConnectKey for SharePoint administrator.

Once the files reside on the computer hosting the Xerox® ConnectKey for SharePoint application, they are protected by the security measures that you have in place in your environment (e.g., strong passwords, password quality policies, firewall, anti-malware software, etc.).

After data processing, the files are transmitted to the final destination using HTTPS if the destination is SharePoint and via SMB if the destination is a Windows® network folder. HTTPS protects the information while in motion via session encryption (the same security mechanism that protects your sensitive information when making online purchases or doing online banking via a web browser).

Finally, once the scanned documents have successfully arrived at their destinations, they are deleted from the ConnectKey for SharePoint server, leaving the only remaining copy of the information at the destination. As above, once stored in SharePoint or your Windows network file system, the files are protected by the security measures that you have in place in your environment.

² The objective of providing the FTP service as an integrated component is to provide a solution that is easy to install and maintain. If you feel that there is a significant threat of data being intercepted while in motion via FTP between the MFP and the ConnectKey for SharePoint server, you may wish to consider an alternative scanning solution which makes use of more secure transfer services (such as HTTPS or SFTP).

Prerequisites

Before installing the web service, make sure that SharePoint® 2007 or SharePoint 2010 is properly installed and configured.

How to Install

Installation instructions are available in the Xerox® ConnectKey™ for SharePoint Installation Guide. As an overview, the web service installer is about 5 MB and will require access to the SharePoint Server. Copy the appropriate installer file for your version of SharePoint (i.e., 2007 or 2010) to the SharePoint Server and run it with administrative privileges. Follow the install routine to completion.

Note

To enable the capability to search your SharePoint server for documents that have been scanned and stored using ConnectKey for SharePoint, indexing must be enabled on your SharePoint server. For more information on how to enable indexing on your SharePoint Server 2007 or 2010, refer to the Microsoft® SharePoint online Help.

Installation of the web service must be done only once. If required, the SharePoint web service can be uninstalled via Control Panel Add/Remove programs.

Frequently Asked Questions

Q: Is installation of the SharePoint (ConnectKey web service) mandatory?

A: Yes, for workflows with filing to SharePoint 2007. It is optional for workflows filing to SharePoint 2010. If you answer yes to any of the following requirements, installation of the ConnectKey web service for SharePoint is mandatory:

- File sizes larger than 200 MB
- Authenticated user impersonation, where the document owner is set as the authenticated scan user and not a SharePoint service account
- Support for Managed Meta-data fields

Workflows with filing to Network Folders do not need to install the web service.

Q: Does the SharePoint Server need to be rebooted?

A: No, the SharePoint server does not require a reboot after the web service install.

Q: Can a terminal session be used to install the web service?

A: Yes, if using a terminal session for the installation of the web service, start the session with the command `mstsc/console` from a command prompt.

