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SharePoint Scanner Plug-in for MOSS 2007/WSS 3.0 User Guide



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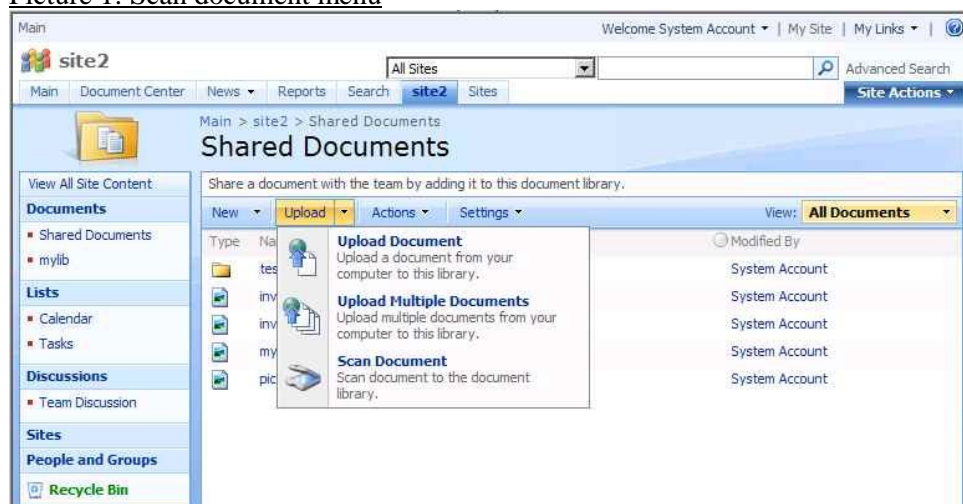


Getting Started

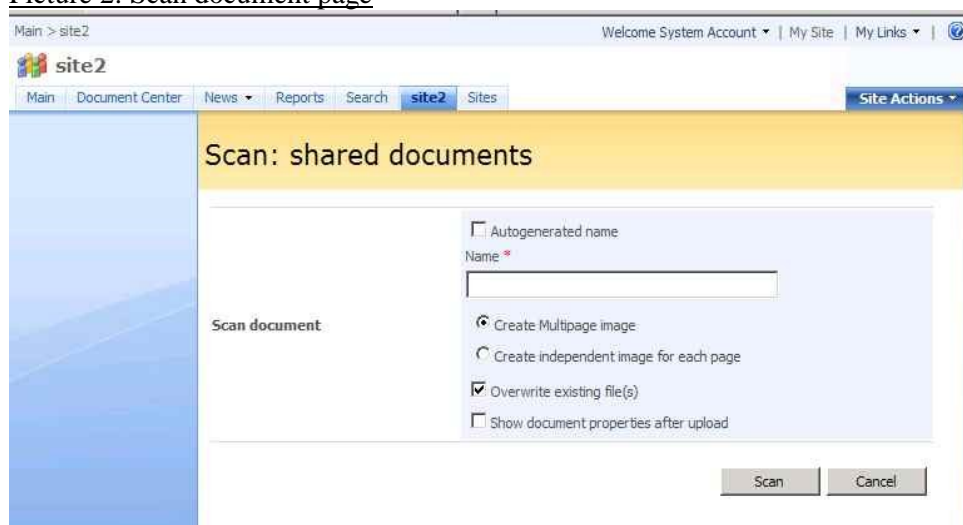
About SharePoint Scanner Plug-in

SharePoint Scanner Plug-in is a powerful tool for scanning documents right into a document library. Scanner Plug-in realized as Windows SharePoint Services feature and distributed as SharePoint solution.

Picture 1: Scan document menu



Picture 2: Scan document page





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This Plug-in allows scanning documents into a document library and filling in properties of the document in the simple and friendly way. It supports all types of scanners: simple desktop and professional scanners with feeders.

Main characteristics

SharePoint version:	MOSS 2007 or WSS 3.0
Client operation system:	Windows 2000/XP/2003/Vista
Browser:	Internet Explorer 6/7
Scan protocol:	TWAIN
Feeder support:	Yes
Output image format:	Tif
Multi-page file creation:	Yes
Multi-document scan and upload:	Yes

Installation

Software Requirements

Server Requirements

- Microsoft Windows SharePoint Services (WSS) v3.0
 - MS Office SharePoint Server 2007 (MOSS)
- OR**

Client Requirements

- MS Internet Explorer 6.0+
- Microsoft .NET Framework 2.0
- Windows 2000/XP/2003/Vista

Scanner Requirements

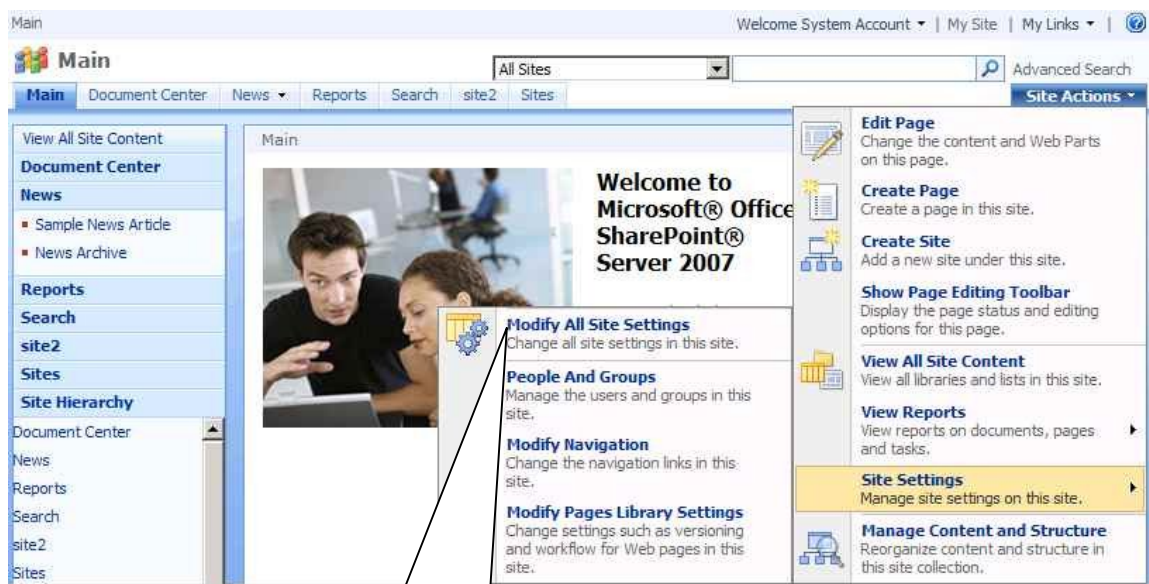
- TWAIN Support



Installation Steps

Server installation

1. Unzip the SharePoint_Scanner.zip file on your WSS/MOSS Windows 2003 Server.
2. Double-click the WebsioScanServerSetup.msi file in order to begin the plug-in installation wizard.
3. After installation is complete open top-level site of site collection where you are going to use the plug-in.
4. Open "Site actions" menu and select option "Site settings->Modify all site settings"



Modify all Site Settings menu



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5. In the Site Settings window select option "Site collection features"

Main > Site Settings
Site Settings

Site Information

Site URL: <http://vmmps2007:8080/>
Mobile Site URL: http://vmmps2007:8080/_layouts/mobile/default.aspx
Version: 12.0.0.4518

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none">People and groupsSite collection administratorsAdvanced permissions	<ul style="list-style-type: none">Master pageTitle, description, and iconNavigationPage layouts and site templatesWelcome pageTree viewSite themeReset to site definitionSearchable columns	<ul style="list-style-type: none">Site content typesSite columnsSite templatesList templatesWeb PartsWorkflowsMaster pages and page layouts	<ul style="list-style-type: none">Regional settingsSite libraries and listsSite usage reportsUser alertsRSSSearch visibilitySites and workspacesSite featuresDelete this siteRelated Links scope settingsSite output cacheContent and structureContent and structure settings	<ul style="list-style-type: none">Search settingsSearch scopesSearch keywordsRecycle binSite directory settingsSite collection featuresSite hierarchyPortal site connectionSite collection audit settingsAudit log reportsSite collection policiesSite collection output cacheSite collection cache profilesSite collection object cacheVariations

Site collection features

6. In the list of installed features find "Scan document" and press "Activate".

Feature Name	Description	Deactivate	Activate
Office SharePoint Server Standard Site Collection features	Features such as user profiles and search, included in the Office SharePoint Server Standard License.	Deactivate	Active
Reporting	Creates reports about information in Windows SharePoint Services.	Deactivate	Active
Routing Workflows	Workflows that send a document for feedback or approval.	Deactivate	Active
Scan Document	Scan document to the document library.	Activate	
Three-state workflow	Use this workflow to track items in a list.	Activate	
Translation Management Workflow	Manages document translation by creating copies of the document to be translated and assigning translation tasks to translators.	Deactivate	Active

Scan document feature



Client installation

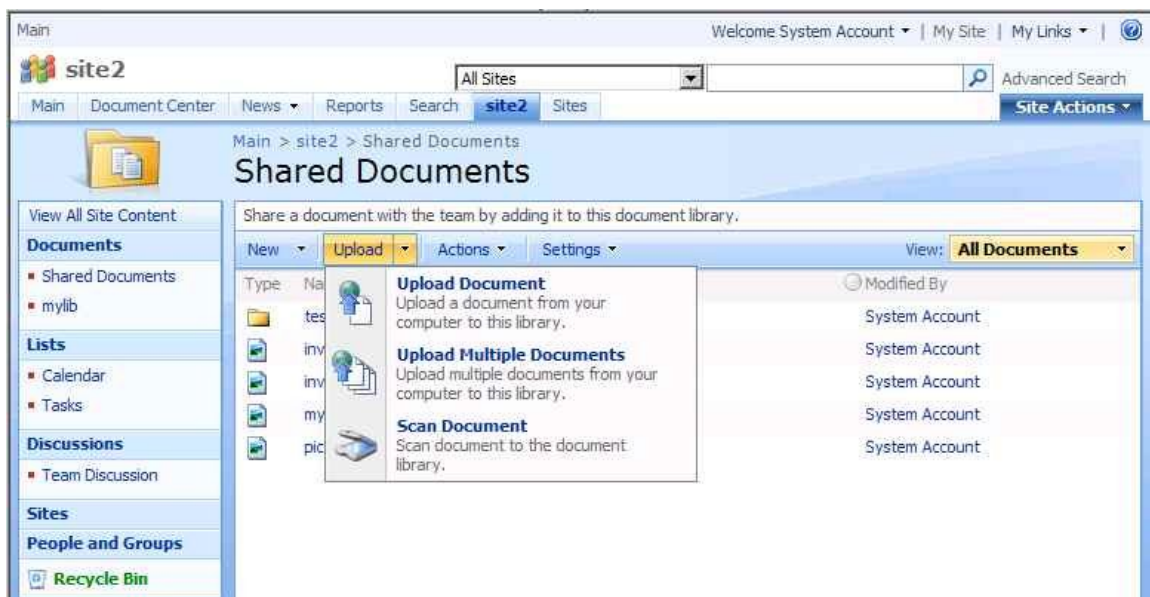
7. Unzip the SharePoint_Scanner.zip file on your client machine
8. Double click WebsioScanClientSetup.msi file in order to begin the plug-in installation wizard.

Using SharePoint Scanner Plug-in

General

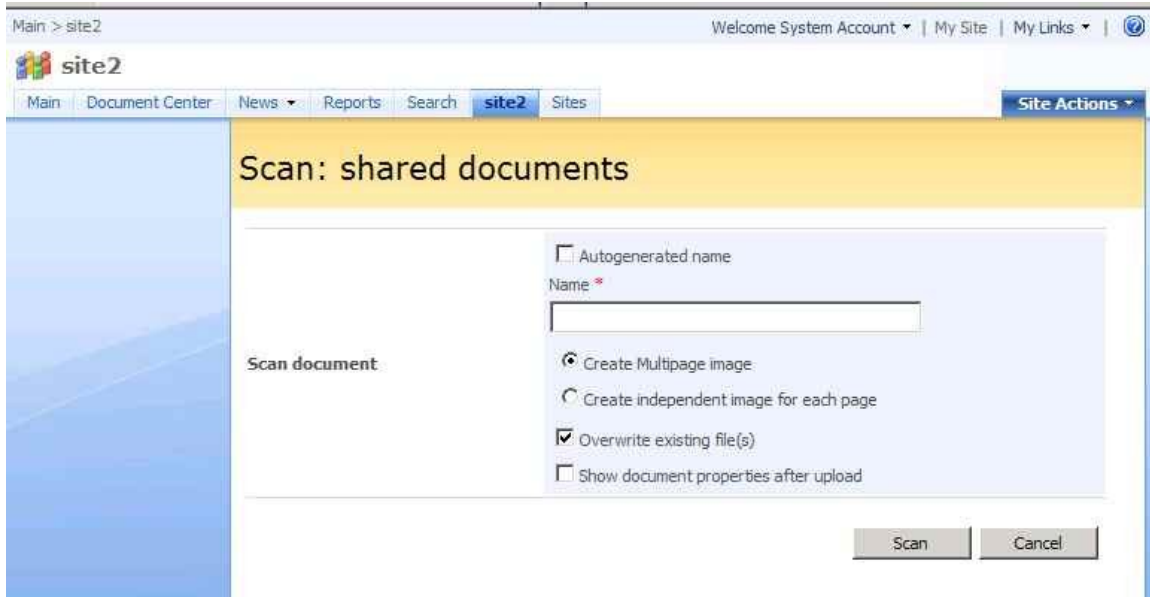
Websio SharePoint Scanner Plug-in enables you to scan a document to selected document library.

After installation every document library will have a new option in Upload menu named "Scan Document"





When user clicks on the new menu option, the new page "Scan Document" will be displayed:



Scan document

- Put document to scanner
- If you have scanner with feeder:
 - To create multi-page file stay option "Create Multipage Image" selected
 - To create an independent image for each scanned page select option "Create independent image for each page"
- For simple desktop scanner stay option "Create Multipage Image" selected
- Fill field "Name" or select option "Autogenerated name" (in case you selected option "Create independent image for each page" option "Autogenerated name" will be selected automatically).



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- If you want to fill extended document properties after document is scanned and uploaded select option "Show document properties after upload". This option is available for mode "Create Multipage Image" only.
- Click on the "Scan" button in "Scan Document" page.
- Select source scanner in "Select Device" dialog and click "Select" button

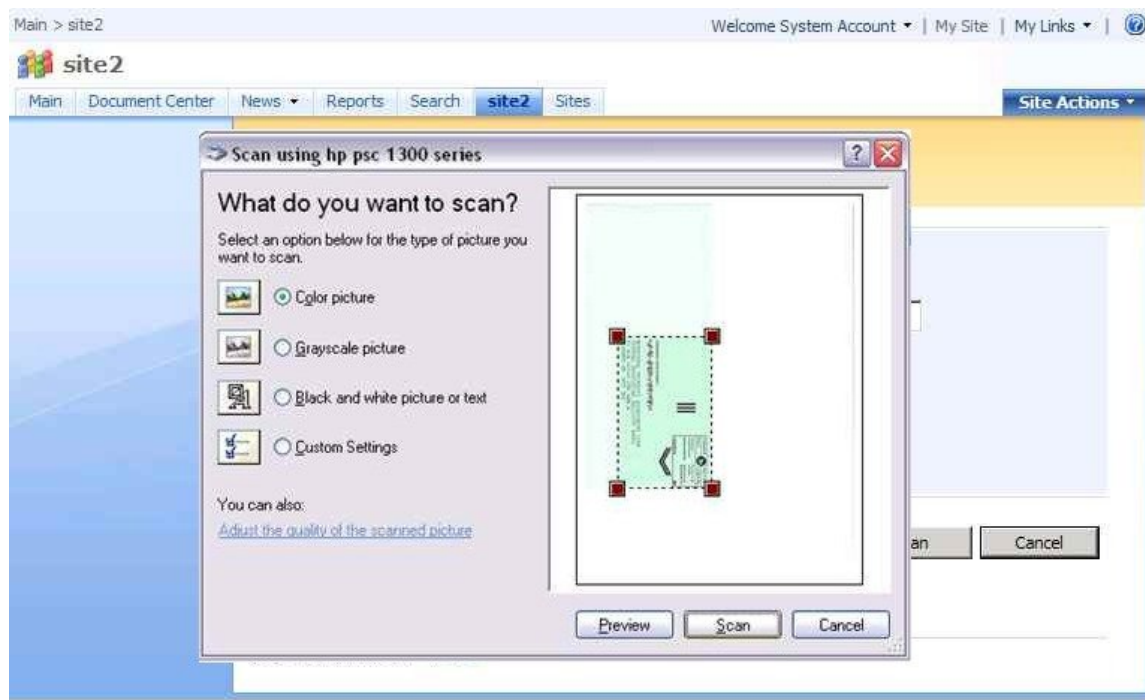


- Using standard scanning window (depends on your scanner software) change scanning parameters (resolution, colors etc), preview document and scan it to the buffer (press scan button).

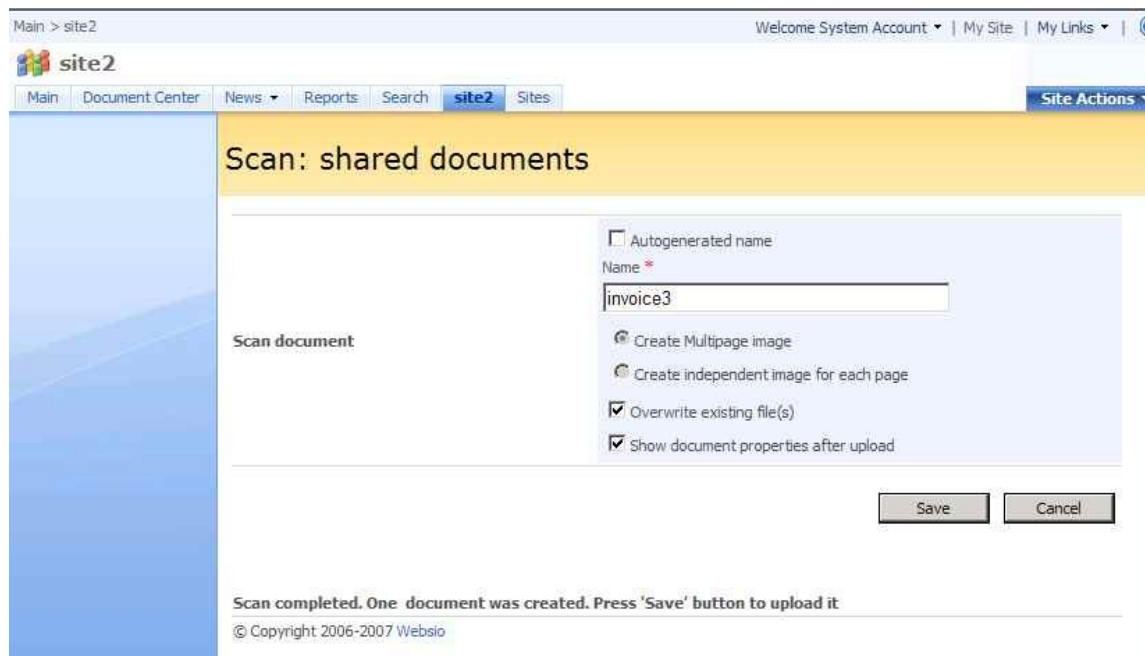


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- After scan is completed the next screen will appear:





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- Press "Save" button to upload scanned document(s).
- In case you selected option "Show document properties after upload" you will be automatically redirected to the document properties screen.

The screenshot shows the 'site2' web application interface. The top navigation bar includes 'Main', 'Document Center', 'News', 'Reports', 'Search', 'site2', and 'Sites'. A user is logged in as 'System Account'. The main content area is titled 'Shared Documents: invoice3' and shows the 'Edit Item' form. The form includes fields for 'Name' (with a red asterisk indicating it is required), 'Title', 'Customer' (with a dropdown menu and a red asterisk), and 'Price'. The 'Name' field contains 'invoice3.tif'. Below the form, there is a status bar indicating the document was created and last modified on 5/19/2007 at 8:46 PM by the System Account. There are 'OK' and 'Cancel' buttons at the top right and bottom right of the form area.



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Otherwise you will be redirected back to the document library page

Main > site2 > Shared Documents

Shared Documents

Share a document with the team by adding it to this document library.

View: **All Documents**

Type	Name	Modified	Modified By
Folder	test	5/13/2007 4:49 PM	System Account
Document	invoice1	5/19/2007 12:59 PM	System Account
Document	invoice2	5/19/2007 1:00 PM	System Account
Document	invoice3 <small>NEW</small>	5/19/2007 8:46 PM	System Account
Document	my	5/14/2007 8:20 AM	System Account
Document	picture1	5/19/2007 12:59 PM	System Account

Navigation Pane:

- View All Site Content
- Documents**
 - Shared Documents
 - mylib
- Lists**
 - Calendar
 - Tasks
- Discussions**
 - Team Discussion
- Sites**
- People and Groups**
- [Recycle Bin](#)



Troubleshooting

Option "Scan document" does not appear

1. Open top-level site of site collection where you are going to use the plug-in.
2. Open "Site actions" menu and select option "Site settings->Modify all site settings"



Modify all Site Settings menu



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3. In the Site Settings window select option "Site collection features"

Main > Site Settings

Site Settings

Site Information

Site URL: <http://vmmps2007:8080/>
Mobile Site URL: http://vmmps2007:8080/_layouts/mobile/default.aspx
Version: 12.0.0.4518

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none">People and groupsSite collection administratorsAdvanced permissions	<ul style="list-style-type: none">Master pageTitle, description, and iconNavigationPage layouts and site templatesWelcome pageTree viewSite themeReset to site definitionSearchable columns	<ul style="list-style-type: none">Site content typesSite columnsSite templatesList templatesWeb PartsWorkflowsMaster pages and page layouts	<ul style="list-style-type: none">Regional settingsSite libraries and listsSite usage reportsUser alertsRSSSearch visibilitySites and workspacesSite featuresDelete this siteRelated Links scope settingsSite output cacheContent and structureContent and structure settings	<ul style="list-style-type: none">Search settingsSearch scopesSearch keywordsRecycle binSite directory settingsSite collection usage reportsSite collection featuresSite hierarchyPortal site connectionSite collection audit settingsAudit log reportsSite collection policiesSite collection output cacheSite collection cache profilesSite collection object cacheVariations

Site collection features

4. In the list of installed features find "Scan document" and press "Activate".

If you can't find option "Scan document" go to paragraph 5.

	Office SharePoint Server Standard Site Collection features Features such as user profiles and search, included in the Office SharePoint Server Standard License	Deactivate	Active
	Reporting Creates reports about information in Windows SharePoint Services.	Deactivate	Active
	Routing Workflows Workflows that send a document for feedback or approval.	Deactivate	Active
	Scan Document Scan document to the document library.	Activate	
	Three-state workflow Use this workflow to track items in a list.	Activate	
	Translation Management Workflow Manages document translation by creating copies of the document to be translated and assigning translation tasks to translators.	Deactivate	Active

Scan document feature



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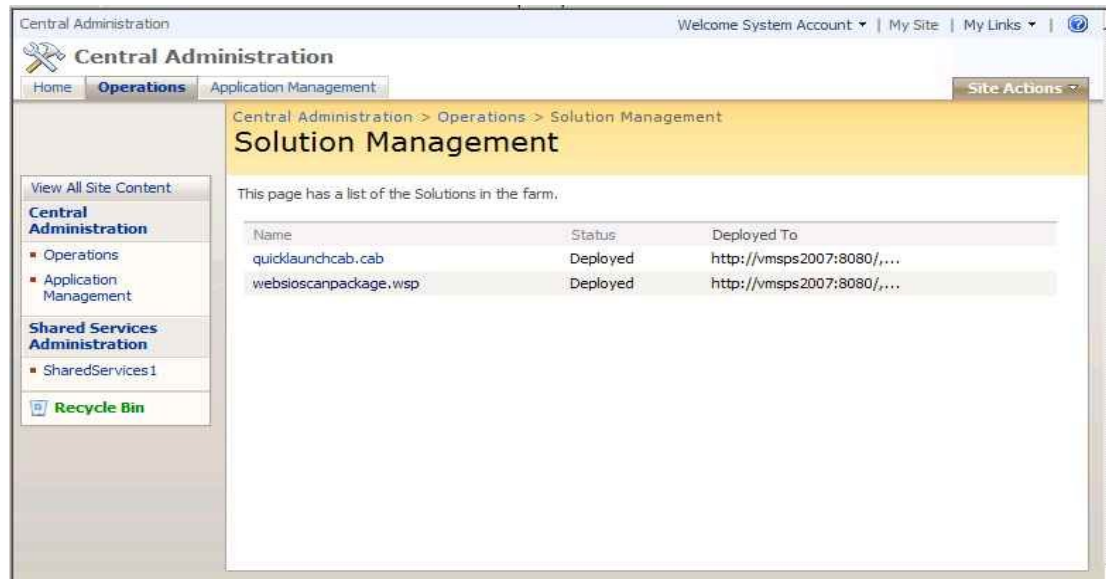
5. Open SharePoint Central administration, select "Operations" and click on "Solution Management".



Solution management



6. In the Solution Management window check that websioscanpackage.wsp has status "Deployed".



7. If not press on the package name (websioscanpackage.wsp)
8. In the Solution Properties window press "Deploy solution". Wait until status "Deployed" will appear. Deployment process may take few minutes.
9. Return to paragraph 1.

After click on the "Scan" button nothing is happened

Possible reasons:

Possible reasons:

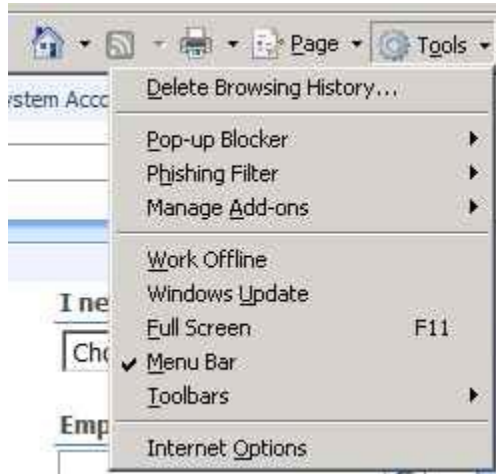
1. Websio Scanner Plug-In Client is not installed.
 - a. Ask your system administrator to install it from WebsioScanClientSetup.msi
2. If you already have Websio Scanner Plug-In Client installed check your browser settings:



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- a. Select from your browser menu option "Tools->Internet Options"



- b. In the opened window select tab "Security" and select icon of your Sharepoint server zone

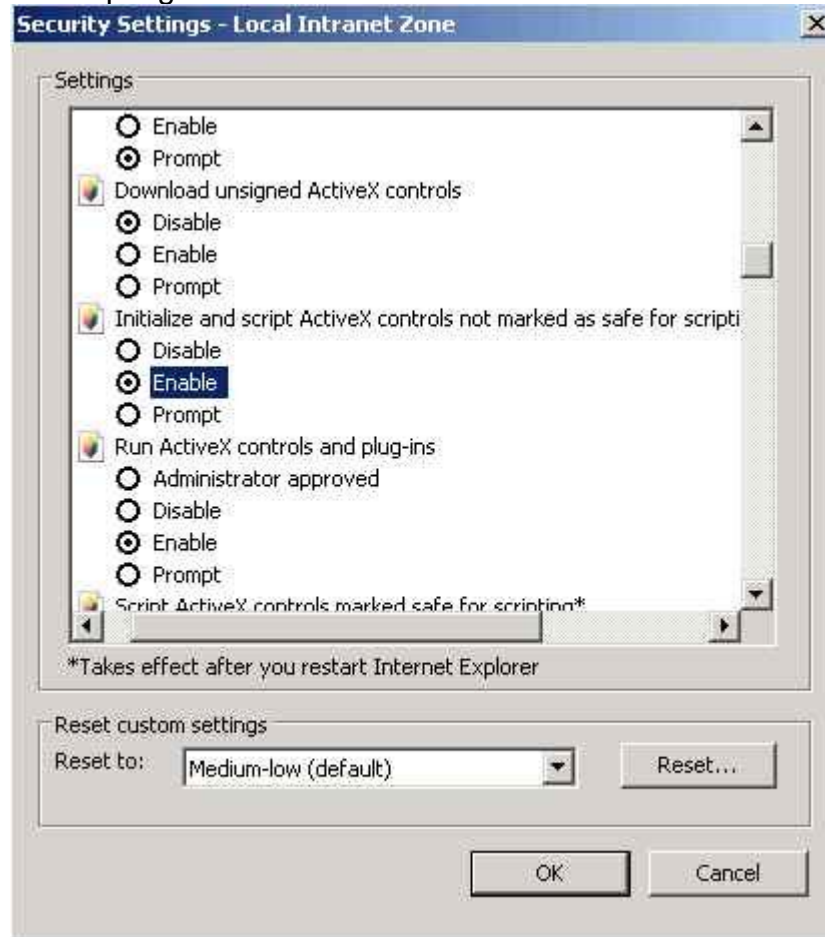




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- c. Press button "Custom level...". In the "Security Settings" window find option "Initialize and script ActiveX controls not marked as safe for scripting" and set it to "Enable".



3. Still have a problem? Ask to our support: support@websio.com