

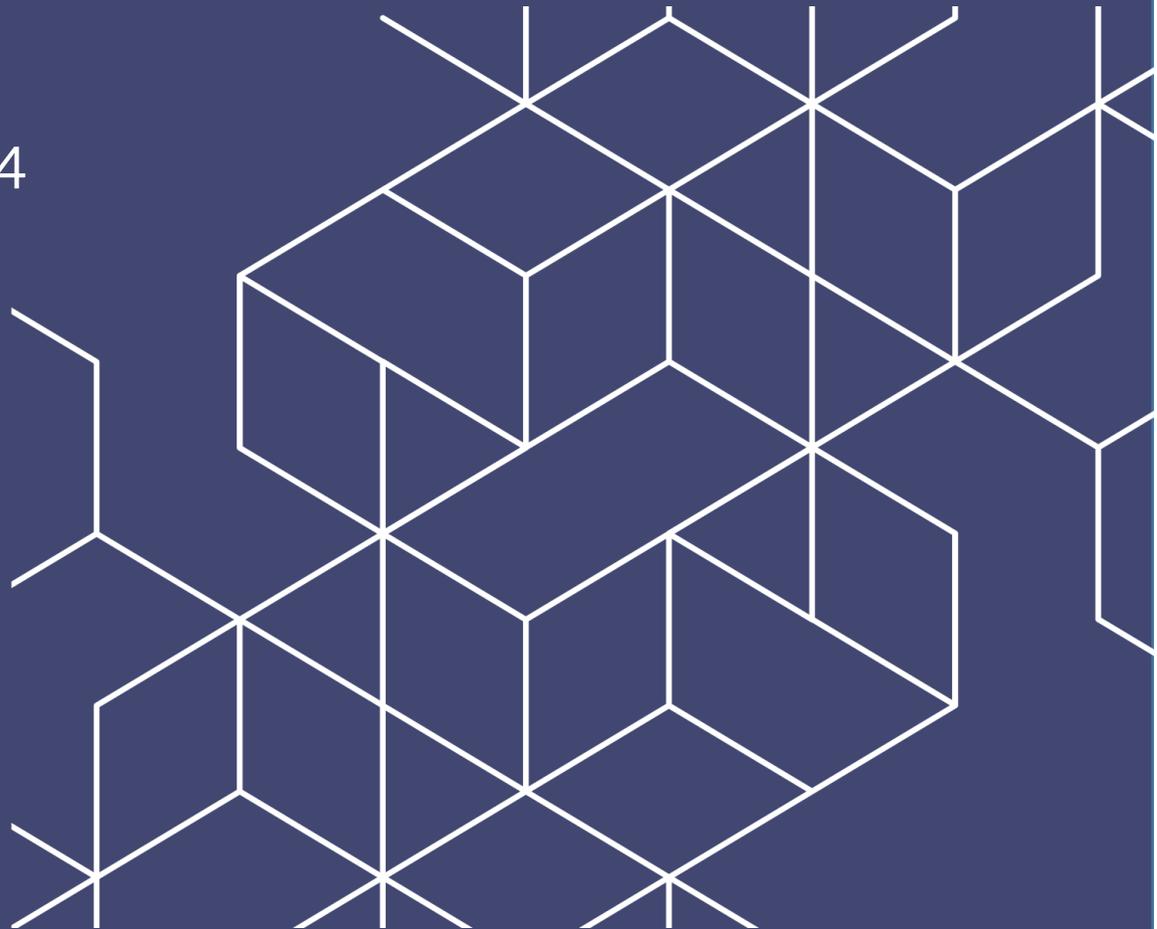
# ATIPXpress



## SharePoint Integration Configuration

v11.7.0

May 2024



# AX v11.7.0 SharePoint Integration Configuration

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# 1 Introduction

## 1.1 About SharePoint Integration

Users must configure their application settings prior to integrating ATIPXpress with SharePoint. This manual outlines the requirements and steps for configuring ATIPXpress for SharePoint integration.

## 1.2 SharePoint Integration Prerequisites

Complete the following steps to ensure your ATIPXpress application is ready to be configured for SharePoint integration:

1. If you are not on ATIPXpress version 11.3.0 or higher, upgrade the application first. Follow the steps in the ATIPXpress Deployment Manual to upgrade your application.
2. If using custom document preprocessing and/or file cabinet mapping, copy the provided DLL to the Scheduler. The path that you choose will be configured in the database in Section 2.6. It is recommended to place the DLL in C:\Program Files\ATIPXpress\Scheduler\bin.
3. Upgrade the application license in the *Administration* settings.

**(!!) Note: The SharePoint feature is tied to your application license, and the feature is automatically enabled with the appropriate license. Please upgrade your license to include the SharePoint integration.**

4. Ensure that the SharePoint integration is enabled in the *Application Features* menu (**Administration > Features and Licenses > Application Features**). It should be enabled automatically after upgrading your license.
5. The *SharePoint Connector Settings* menu should be visible when accessing **Administration > Document Management**. If the menu is not visible, log out of the application and log back in.

Once these prerequisites have been met, you can set configurations within the application to enable SharePoint.



## 2 Configuring SharePoint Integration

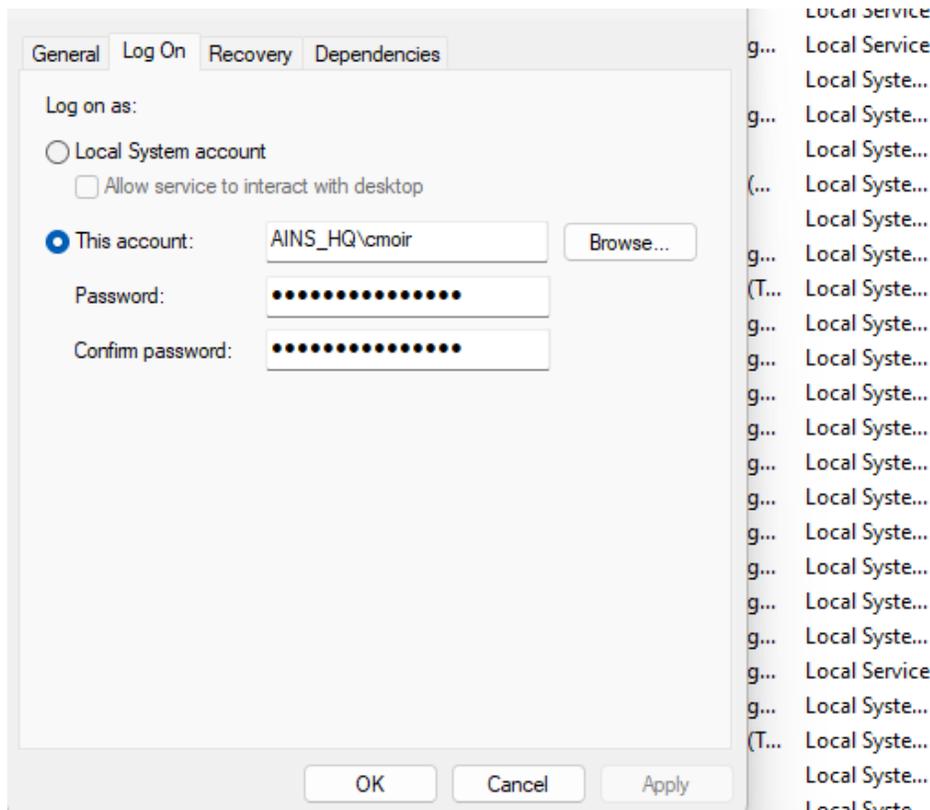
The following subsections outline each step necessary to successfully enable SharePoint.

### 2.1 Set Scheduler Service Account

You will also need to configure the appropriate settings for the Scheduler service account.

1. In *Services.msc*, right-click the **ATIPXpress/ATIPXpress Scheduler service** and click **Properties**.
2. In the **Log On** tab, configure the service to the desired account.

**(!!) Note: The account chosen must have proper permissions configured in the SharePoint site.**



**(!!) Note: The configured identity of the AXAppPool account must also be an authenticated SharePoint site user.**



## 2.2 Set "Full Control" Permissions

As the Scheduler service is configured to use a domain user account, that domain user should have permissions for any files and directories it may need to access. Ensure that "Full Control" permissions are granted to the service account for the following locations:

Folder Name	Folder Path	Explanation
Installation Folder	C:\Program Files\ATIPXpress	ATIPXpress installation folder
Temp Folder	C:\Windows\Temp\AINS	Used for uploading documents
Document Folders	C:\...\AAXWCORL C:\...\AAXWDOCS C:\...\AAXWDOFL C:\...\AAXWERR C:\...\AAXWPNG	Used for PNG cache and documents (after the Temp folder)

## 2.3 Configure Scheduler for SharePoint Document Import

Lastly, you'll need to configure the Scheduler to run the SharePoint Document Import job.

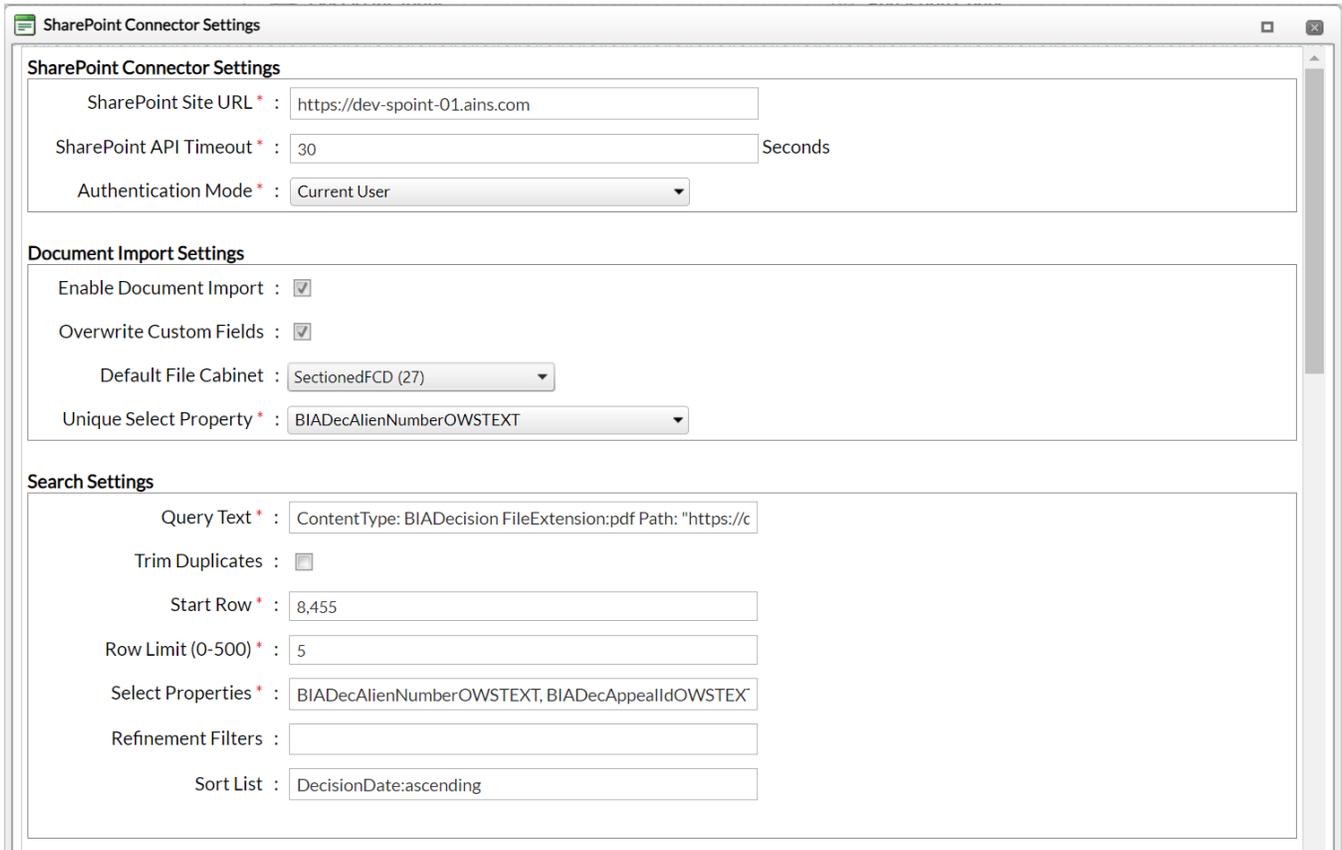
1. Navigate to the **Scheduler Configuration** screen in **Administration > System Administration**.
2. The default frequency is set to 10, but you can change the frequency if desired.

**(!!) Note: It is not recommended to set RowLimit to a value greater than 50 if the default frequency of 10 minutes is kept. The frequency should be decreased accordingly when testing higher RowLimit Values.**



# 3 SharePoint Administration Settings

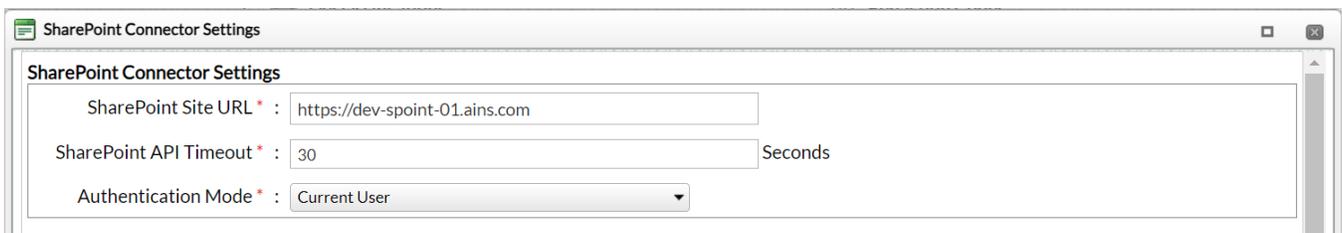
There are options to configure the overall settings for the SharePoint connector under **Administration > Document Management > SharePoint Connector Settings** as shown below:



The settings on this screen are described in the following sections.

## 3.1 SharePoint Connector Settings

Use the SharePoint Connector Settings section to configure the connection to your SharePoint site.



Fields in this section include:



Field	Description
SharePoint Site URL	The host name of the SharePoint site you wish to use
SharePoint API Timeout	Set the desired <i>SharePoint API Timeout</i> seconds. The default SharePoint API Timeout value is 30 seconds, but it can be set to any value between 0 and 2,147,483,647 seconds
Authentication Mode	Authentication method used for the integration. <b>(!!) Note: Current User is the only available authentication mode.</b>

## 3.2 Document Import Settings

The Document Import Setting section provides configuration options for documents imported from SharePoint into Document Management.

**Document Import Settings**

Enable Document Import :

Overwrite Custom Fields :

Default File Cabinet :

Unique Select Property \* :

Field	Description
Enable Document Import	Select to activate document imports from SharePoint. You can unselect this to prevent document import if needed. <b>(!!) Note: If this option is unselected, the job will still run, however documents will not be imported.</b>
Overwrite Custom Fields	If selected, overwrites existing custom field data with the most recent from SharePoint.



Field	Description
Default File Cabinet	DM File Cabinet the documents will be imported into.
Unique Select Property	Used to uniquely identify SharePoint documents and to create the SharePoint folders in DM. Options in this dropdown are determined by the entries in the <i>Select Properties</i> field under <i>Search Settings</i> .

## 3.3 Search Settings

Use the *Search Settings* section to control the documents that are imported from your SharePoint library. These settings mirror the settings used in the API. See the link below for more details:

<https://learn.microsoft.com/en-us/sharepoint/dev/general-development/sharepoint-search-rest-api-overview>

**Search Settings**

Query Text \* :

Trim Duplicates :

Start Row \* :

Row Limit (0-500) \* :

Select Properties \* :

Refinement Filters :

Sort List :

## 3.4 SharePoint Property to Custom Field Mappings

### 3.4.1 Using This Configuration

Use this section to map your defined SharePoint properties to the Document Custom Fields configured in your application.



## SharePoint Configuration Settings

**SharePoint Property to Custom Field Mappings**

BIADecAlienNumberOWSTEXT    Select a document custom field.    Add    Delete

SharePoint Property	Document Custom Field
BIADecAlienNumberOWSTEXT	A-Number
BIADecAppealIdOWSTEXT	Appeal ID
BIADecAppealTypeOWSTEXT	Appeal Type
BIADecBaseCityCodeOWSTEXT	Base City Code
BIADecBaseCityOWSTEXT	Base City
BIADecCaseTypeOWSTEXT	Case Type
BIADecCircuitCourtOWSTEXT	Circuit Court
BIADecCodeOWSTEXT	Decision Code
DecisionDate	Decision Date
BIADecFiledByOWSTEXT	Filed By
BIADecIJCCodeOWSTEXT	IJ Code
BIADecIJOOWSTEXT	IJ Name
BIADecMembersOWSTEXT	Members
BIADecNTADateOWSDATE	NTA Date
BIADecBatteredSpouseOWSBOOL	Battered Spouse
BIADecReleaseInfoOWSBOOL	Release Info

Note:  
Please ensure the document custom field can support all values from the respective SharePoint property.  
Custom list values must be present for every possible SharePoint property value if mapping to single or multi-select custom fields.

To configure these mappings, first select a **SharePoint Property** from the dropdown list on the left, then select a corresponding **Document Custom Field** from the dropdown on the right and click **Add** to add the mapping. You can also select a mapping from the list and click **Delete** to remove it from this list as needed.

**(!!) Note: The Document Custom Fields in the drop-down include all fields configured in the application. Please ensure these fields are available in the File Cabinet Drawer you have selected.**

### 3.4.2 Configure Boolean Metadata

Boolean SharePoint properties must be configured to use Single Select custom fields with two options.

1. Open the *Document Custom Fields* configuration menu (**Administration > Document Management > Document Custom Fields**).
2. Open the *Document Custom Field* configuration screen for the applicable type fields.
3. Use the *Type* drop-down menu to select **List Option – Single**. Then, configure the remaining fields as shown below.



4. Add custom list options by click the **List Options expander**  button.
5. The *Yes/No - Custom List Values* menu opens. Here, you can configure custom list values as needed.

Name	Default	Enabled	Show in PAL(Public Access Link)
No	Yes	Yes	No
Yes	No	Yes	No

**(!!) Note: Boolean true values can be mapped to list values of “True” or “Yes” with any variation of capitalization. Boolean false values can be mapped to list values of “False” or “No” with any variation of capitalization.**

### 3.5 Document Custom Field to Reading Room Custom Field Mappings

Use this section to map Document Custom Fields to Reading Room Custom Fields. This populates the Document Custom Field data in the corresponding New Reading Room folder page automatically when documents are added to the Reading Room.



## SharePoint Configuration Settings

**Document Custom Field to Reading Room Custom Field Mappings**

Select a document custom field.  Select a PAL Reading Room custom field.

Document Custom Field	Reading Room Custom Field
A-Number	A-Number
Appeal ID	Appeal ID
Appeal Type	Appeal Type
Base City	Base City
Base City Code	Base City Code
Battered Spouse	Battered Spouse
Case Type	Case Type
Circuit Court	Circuit Court
Decision Code	Decision Code
Decision Date	Decision Date
Filed By	Filed By
IJ Code	IJ Code
IJ Name	IJ Name
Members	Members
NTA Date	NTA Date
Release Info	Release Info

Note:  
Custom fields on the 'New Reading Room Folder' page are prepopulated according to these mappings.  
Please ensure all custom list values are present for single and multi-select custom fields.

To configure these mappings, first select a **Document Custom Field** from the dropdown list on the left, then select a corresponding **Reading Room Custom Field** from the dropdown on the right and click **Add** to add the mapping. You can also select a mapping from the list and click **Delete** to remove it from this list as needed.

## 3.6 Custom DLL Settings

You can configure your custom Dynamic Link Library (DLL) using the fields in this section.

**Custom DLL Settings**

Enable Custom DLL Page Removal :

Enable Custom DLL File Cabinet Selection :

Custom DLL Path \* :

Fully Qualified DLL Class Name \* :

Page Removal Method Name \* :

File Cabinet Metadata Property \* :

File Cabinet Mapping Method Name \* :

Note: \* fields are mandatory



## SharePoint Configuration Settings

Field	Description
Enable Custom DLL Page Removal	Select this option to enable the ability to remove pages using a custom DLL.
Enable Custom DLL File Cabinet Selection	This setting allows the use of a custom DLL to choose the destination file cabinet for each document according to the value of an individual SharePoint property.
Custom DLL Path	This path must be on the scheduler server that is configured to run the SharePoint job.
Fully Qualified DLL Path Name	Fully Qualified DLL Path Name.
Page Removal Method Name	Name of the method within the class that is used to execute the page removal.
File Cabinet Metadata Property	The SharePoint property used in the selected method.
File Cabinet Mapping Method Name	Name of the method within the class that is used to execute the page file cabinet mapping.

