SKYSOFT SYSTEMS

inForm^{TM} SharePoint Connector 1.0

Microsoft SharePoint Connector User's Guide

SharePoint Connector User's Guide

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inForm SharePoint Connector Overview

The inForm SharePoint Connector allows organizations to wirelessly synchronize records between the inForm client on the BlackBerry Smartphone and a user defined list in SharePoint server.

The purpose of this User's Guide is to help you both get started quickly with the SharePoint connector and also to provide a reference for your ongoing use of the application. If you have any additional questions or concerns with installing and using the SharePoint Connector, please contact our support team at support@skysoftsystems.com.

System Requirements

- **inForm Device Requirement:** All BlackBerry clients using the SharePoint Connector must first have the inForm version 2.5 application installed. To download this version to your BlackBerry Device, please visit http://www.skysoftsystems.com/inform25/inform.jad from your BlackBerry browser.

- **SharePoint Connector License Requirement**: For each user on the SharePoint Connector, a device license is required. Please visit www.skysoftsystems.com to obtain your Connector Device licenses.

- The RAM and Disk requirements are negligible provided that you are using less than 1000 BlackBerry devices with the solution. For higher capacity requirements, please contact sales@skysoftsystems.com

- SharePoint connector runs as an executable 32 bit application on windows XP, Vista, Windows 7, and all windows server products.

- Network   to a configured SharePoint server 2003 or 2007 implementation running SharePoint services. The product has not yet been tested on SharePoint server 2010.   does not need to be local. ***Note: The product has not been tested using SSL.***

Getting Started

Important Note

Because the system relies on email transport, there are often two issues that arise when configuring the Connector to be used within the organization:

1. **Email Spam Filters** – Spam/Junk mail filters can flag records coming from/going to the device. If you find that records do not sync between the device and database, this is typically the number one cause of such issues. Please ensure that there are no quarantines.

2. **Time Delays –** When running on BES, data exchange between the devices and servers is almost real-time. However, when running on BIS, there can be a delay between when the BIS server receives an email and relays it to the device. There have been delays observed up to 5 minutes in length. In addition, the POP/SMTP email server you have may introduce delay into the synchronization of records.

Downloading and Installing the Application

First, download the application from:

http://www.skysoftsystems.com/spconnector/setup.msi

Simply launch the installer to install the connector to the machine, and follow the installation prompts.

Configuration

Creating users

To add your users, you must have the email address connected to their BlackBerry device, their device PIN, and the license key for the user. To obtain the connector license key please visit www.skysoftsystems.com.

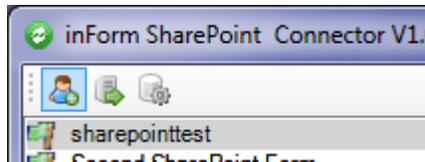Select the User Icon as illustrated below in Figure 1:

Figure 1 - Add Users

This will take you to the user management screen. You then want to add a user by selecting the 'Add' button, and filling out the required information as illustrated in Figure 2
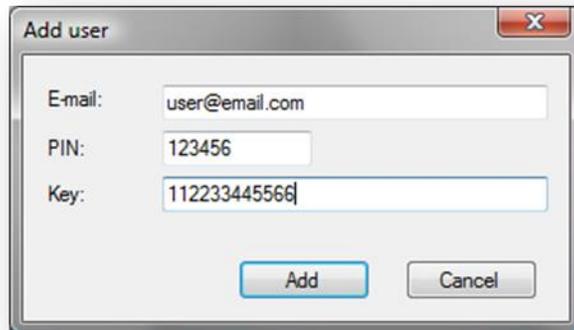

Figure 2 - Adding a User

IMPORTANT NOTE: If a device has multiple email addresses attached to it, the email address you MUST use here is the one that the inForm application uses to send records from the device. You can determine this by loading the form onto the BlackBerry device and trying the 'Email' feature to send a copy of form output to your own email address. You can then determine the email address being used for the BlackBerry device.

Configuring the mail server

The inForm solution relies on the secure email transport of the BlackBerry service (both BIS and BES). Form data is passed from the device using the email transport.

The mail server will be a single email account that you will use to securely send and receive data to and from your BlackBerry users. You only need to configure one mail account for the connector, and all forms can be sent to and from this account.

To configure the mail server, select the Server Configuration button from the main screen:
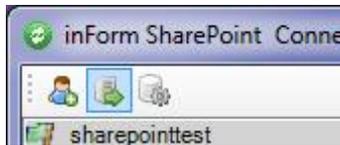
Figure 3 - mail server configuration

On the configuration screen, you will want to configure and test the POP settings for the account you wish to use on your mail server as illustrated in Figure 4.
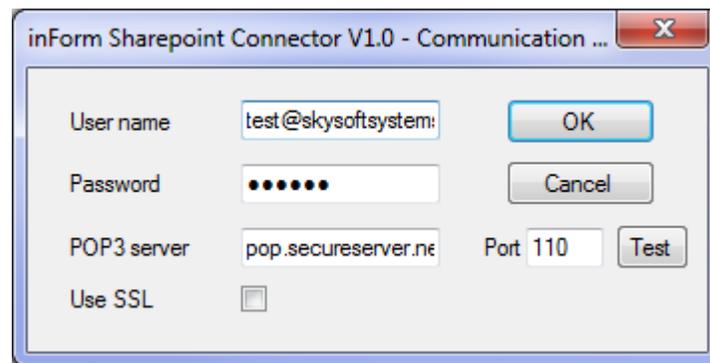

Figure 4 - Configuring the mail server

Once you think you have configured the mail server correctly test the POP connection by using the 'Test' button.

The key fields for the mail server:

- **Username:** The email account user name you wish to use to send and receive data
- **Password:** The password of the mail account
- **POP3 Server and Port:** The server address and port number for the POP connection.
- **Use SSL:** Specifies if SSL must be used to connect to the mail server:

IMPORTANT NOTE: We recommend creating a new and dedicated email account for the purpose of sending and receiving data using the inForm connector.   If you try to use your existing email account you could run into technical issues, as the connector would be required to parse through many emails that are not intended for it when checking the mail box, or email clients may pull completed forms before the connector can   them.

Preparing the device Form.

Now that you've configured your users and your email server, you're ready to configure the form that you'd like to synchronize your data with.

In order for your form to work with the data connector there are 3 key settings you must enable in your form:

1. You must use the 'Submit' Feature

2. You must select the email address in the submit email that is identical to the email account you configured in the 'Configuring Mail Server' section of this document.

3. You must use the 'XML' format for form submissions.

This setup is illustrated below in Figure 5
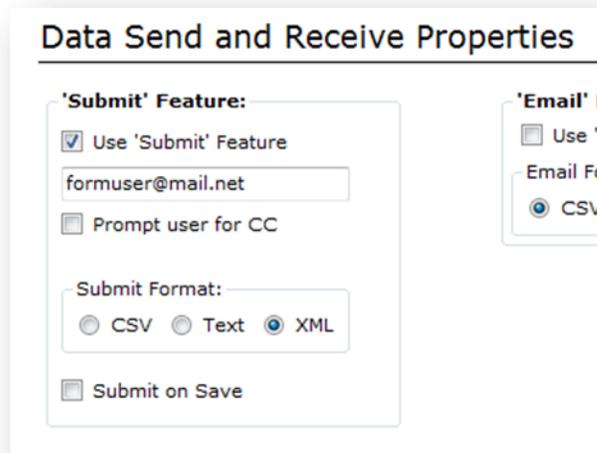
Figure 5 - Configuring your Form to use with the SharePoint Connector

Once you've updated the form, you want to send it to your form user devices using the inForm editor, and also save the resulting .mff file to a location that you can easily   it for the final step, which is the SharePoint Mapping.

Mapping SharePoint

Now that you have configured your users, the mail server, and you've prepared the Form, you're ready to the final step which is to map to the database. To start this process, select the 'Map Database' icon from the main screen as illustrated in the 'Map Database' icon.
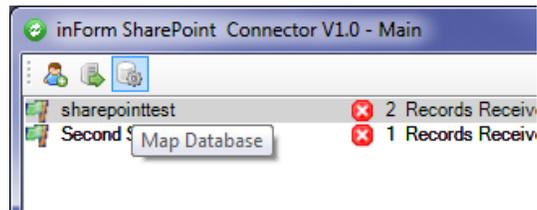

Figure 6 - Map Database Icon

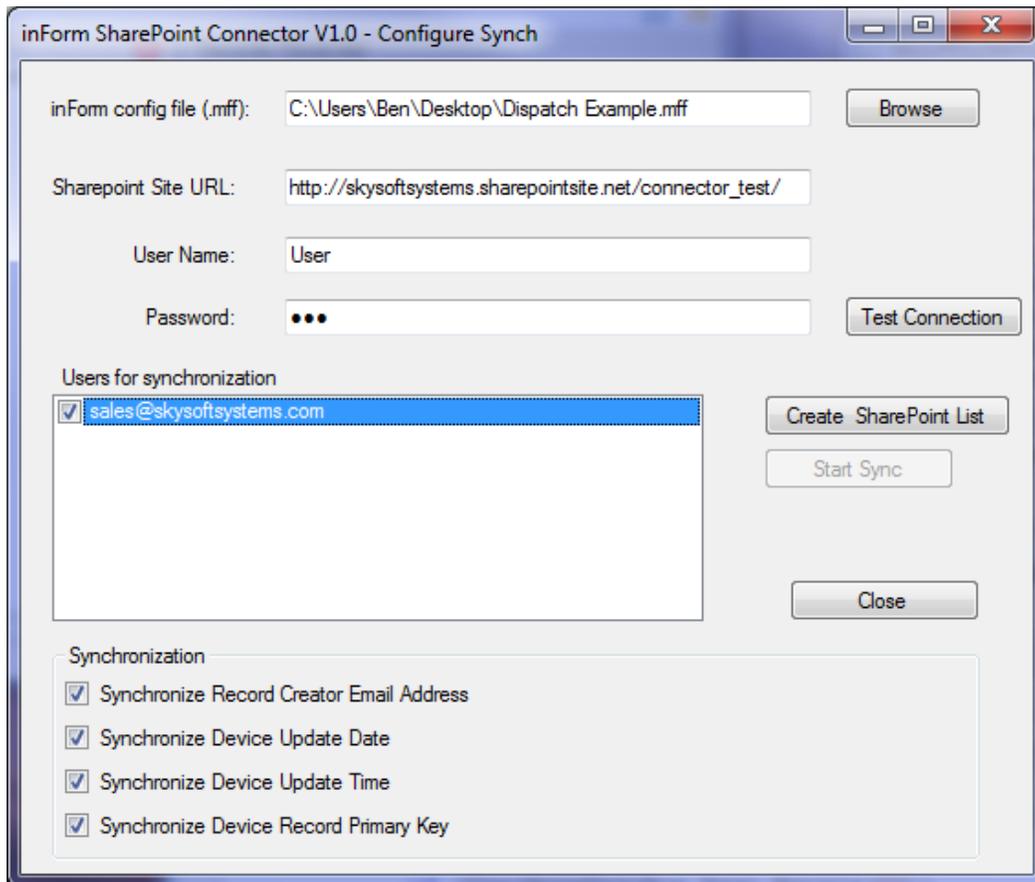You will now be given the database mapping screen as illustrated in Figure 7:

Figure 7 - Database Mapping Screen

To successfully map the database, please follow the following steps:

1. Select the inForm configuration (.mff) file that you created using the inForm desktop editor. If you do not have the inForm desktop editor, please visit our website . You can use the file browser to select the .mff file from your computer or a location on the network. (http://www.skysoftsystems.com) or contact sales@skysoftsystems.com

2. Select the SharePoint site URL that you would like to synchronize to. Note that the site can be either your main site, or a Subsite on your SharePoint server. You must always end your site reference with '/', and you must not include any web pages or extensions. Please see figure 7 for an example.

3. Set SharePoint username and password. Must be a user that is configured and authorized to use the Lists.asmx Web service for that particular site.

4. Test the connection by hitting the Test button to make sure that your URL, username, and password are correct.

5. Select the configured users you would like to synchronize the form with by checking the checkbox beside that user's email address. This user email address MUST have a BlackBerry device associated with it. This is an important step. You may have some forms you wish to synchronize with some users, and others you do not, so this step is important for determining which users you would like for the particular form that you have designed.

6. Select the optional Synchronization elements:

    a. **Synchronize Record Creator Email Address:** Will create a SharePoint list entry with the user's email address that submitted the record.

    b. **Synchronize Device Update Date** – Will create a SharePoint list entry with the date that the record was submitted from the user's device.

    c. **Synchronize Device Update Time**– Will create a SharePoint list entry with the time that the record was submitted from the user's device.

    d. **Synchronize Device Primary Key**– Will create a SharePoint list entry with the primary key that the device assigned to the record when it was created.

7. Now that you've select your configuration, you're ready to Create the list in the target SharePoint site – Hit the 'Create SharePoint List' button.   You will get a report that the 'Schema creation complete!

8. To verify, you can now navigate to the SharePoint site and verify that your list has been created:
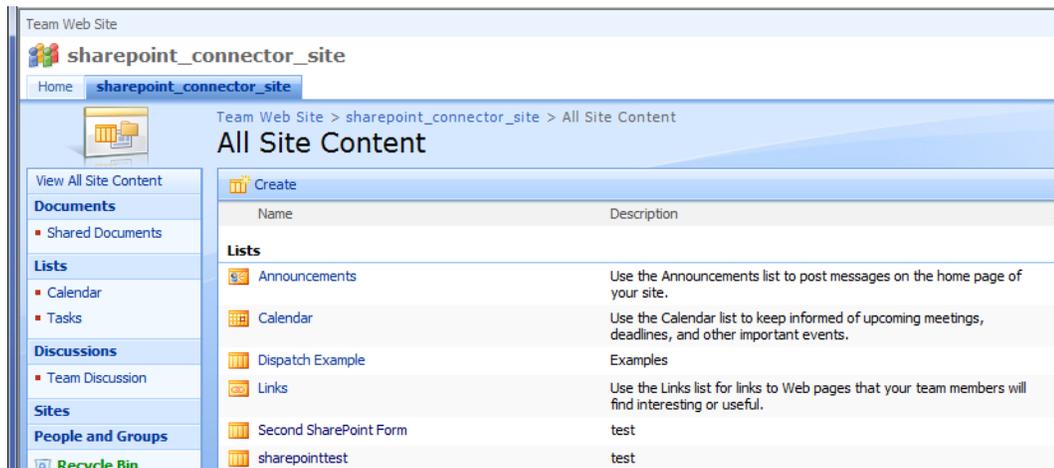
Figure 8 - Verify creation of SharePoint lists

Note that the Description field for the SharePoint list maps to the Category field of your inForm form.

You can look at the details of the list to make sure that you see all of the controls from your SharePoint form definition:
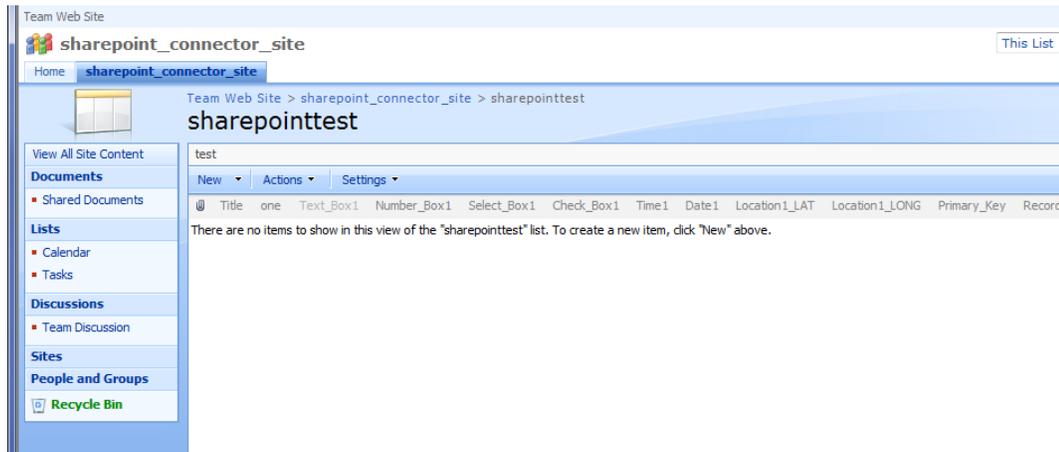
Figure 9 - Verify that your form fields from the .mff file are in the SharePoint list

9. You are now ready to synchronize your data with the device – please move to the next section.

Synchronizing data with the BlackBerry devices

Now that you have completed the steps in all the prior sections of this document, you are ready to start synchronizing:

1. Hit the 'Start Sync' button on the Database Mapping Screen.
2. Close the window but hitting the 'Close' button.

Synchronization Status Screen

You will now see the status screen as illustrated in Figure 10. The form name will be displayed along with the current synchronization status.

The inForm connector will continue running on the server if you minimize the window. In this event, you will see the inform connector icon in the status tray.
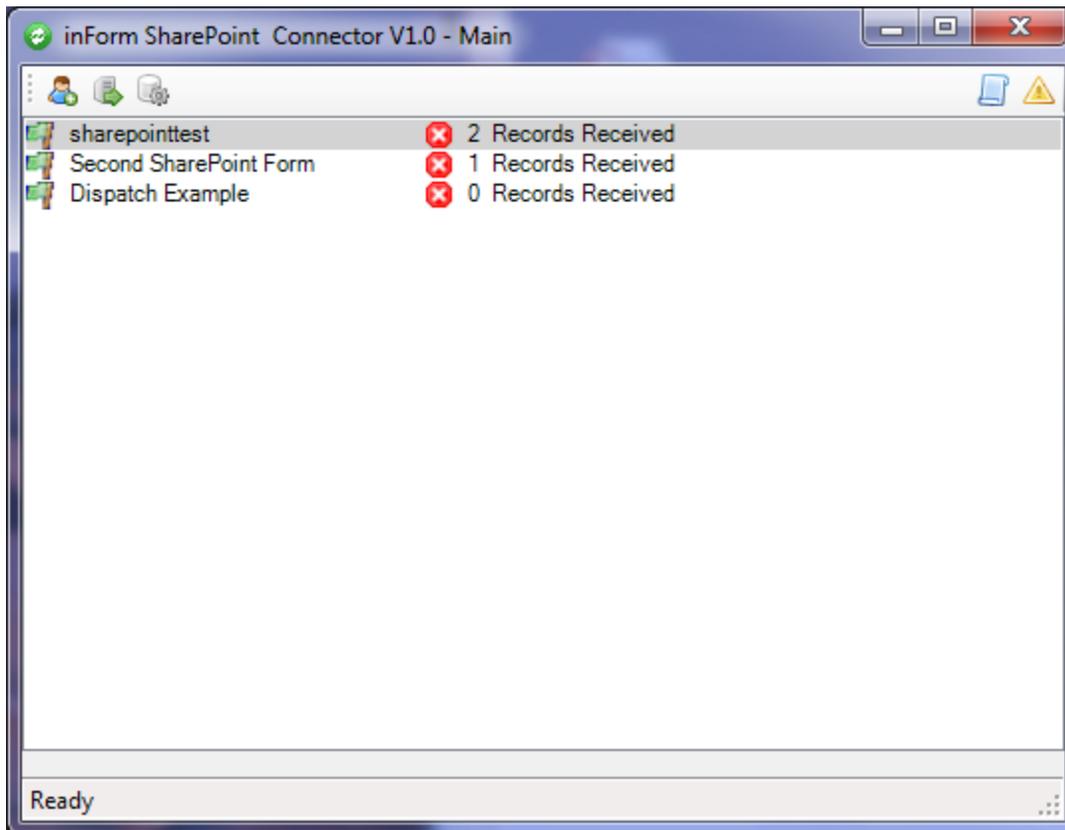
Figure 10 - Sync Status Screen

Some notes about the Screen Synchronization screen

a. To stop the synchronization of a particular form, press the red stop icon. You will see that the status flag on the left changes color from green (running) to red (stopped). You can resume the synchronization by pressing the green sync button that took the place of the red icon.

b.

c. You can view the sync logs and the system log by clicking the icons in the top right hand corner of the main screen. These logs are useful for determining what types of issues you may be having if records are not syncing to the devices.

d. If you wish to delete a form and no longer synchronize it, right click on the row, and select the 'delete' option.

Troubleshooting

Application logs

Your primary source of troubleshooting the connectors is to view the two main application logs, ed from the top right hand corner of the main application window as illustrated in Figure 11.

Figure 11 - Application Logs

The Synch Log will show you all of the checks done to the target mailbox as well as database server, and will indicate if there are any problems. When you open the log, it will show you a history up to the most recent log entry, as illustrated in

```
Log Viewer                                                               ✖

[09/09/2009 1:00:10 PM] There are 0 messages in the INBOX       ▲
[09/09/2009 4:30:19 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:30:49 PM] Sync start
[09/09/2009 4:30:49 PM] Connecting to POP3 server
[09/09/2009 4:30:49 PM] There are 0 messages in the INBOX
[09/09/2009 4:30:49 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:31:19 PM] Sync start
[09/09/2009 4:31:19 PM] Connecting to POP3 server
[09/09/2009 4:31:20 PM] There are 0 messages in the INBOX
[09/09/2009 4:31:20 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:31:50 PM] Sync start
[09/09/2009 4:31:50 PM] Connecting to POP3 server
[09/09/2009 4:31:50 PM] There are 0 messages in the INBOX
[09/09/2009 4:31:50 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:32:20 PM] Sync start
[09/09/2009 4:32:20 PM] Connecting to POP3 server
[09/09/2009 4:32:21 PM] There are 0 messages in the INBOX
[09/09/2009 4:32:21 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:32:51 PM] Sync start
[09/09/2009 4:32:51 PM] Connecting to POP3 server
[09/09/2009 4:32:51 PM] There are 0 messages in the INBOX
[09/09/2009 4:32:51 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:33:21 PM] Sync start
[09/09/2009 4:33:21 PM] Connecting to POP3 server
[09/09/2009 4:33:22 PM] There are 0 messages in the INBOX
[09/09/2009 4:33:22 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:33:52 PM] Sync start
[09/09/2009 4:33:52 PM] Connecting to POP3 server
[09/09/2009 4:33:52 PM] There are 0 messages in the INBOX
[09/09/2009 4:33:52 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:34:22 PM] Sync start
[09/09/2009 4:34:22 PM] Connecting to POP3 server
[09/09/2009 4:34:23 PM] There are 0 messages in the INBOX
[09/09/2009 4:34:23 PM] Sync end
--------------------------------------------------------------
[09/09/2009 4:34:53 PM] Sync start
[09/09/2009 4:34:53 PM] Connecting to POP3 server
[09/09/2009 4:34:54 PM] There are 0 messages in the INBOX
[09/09/2009 4:34:54 PM] Sync end                                ▼

                                                    [  OK  ]
```
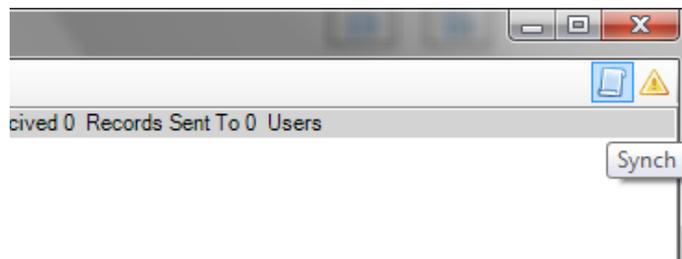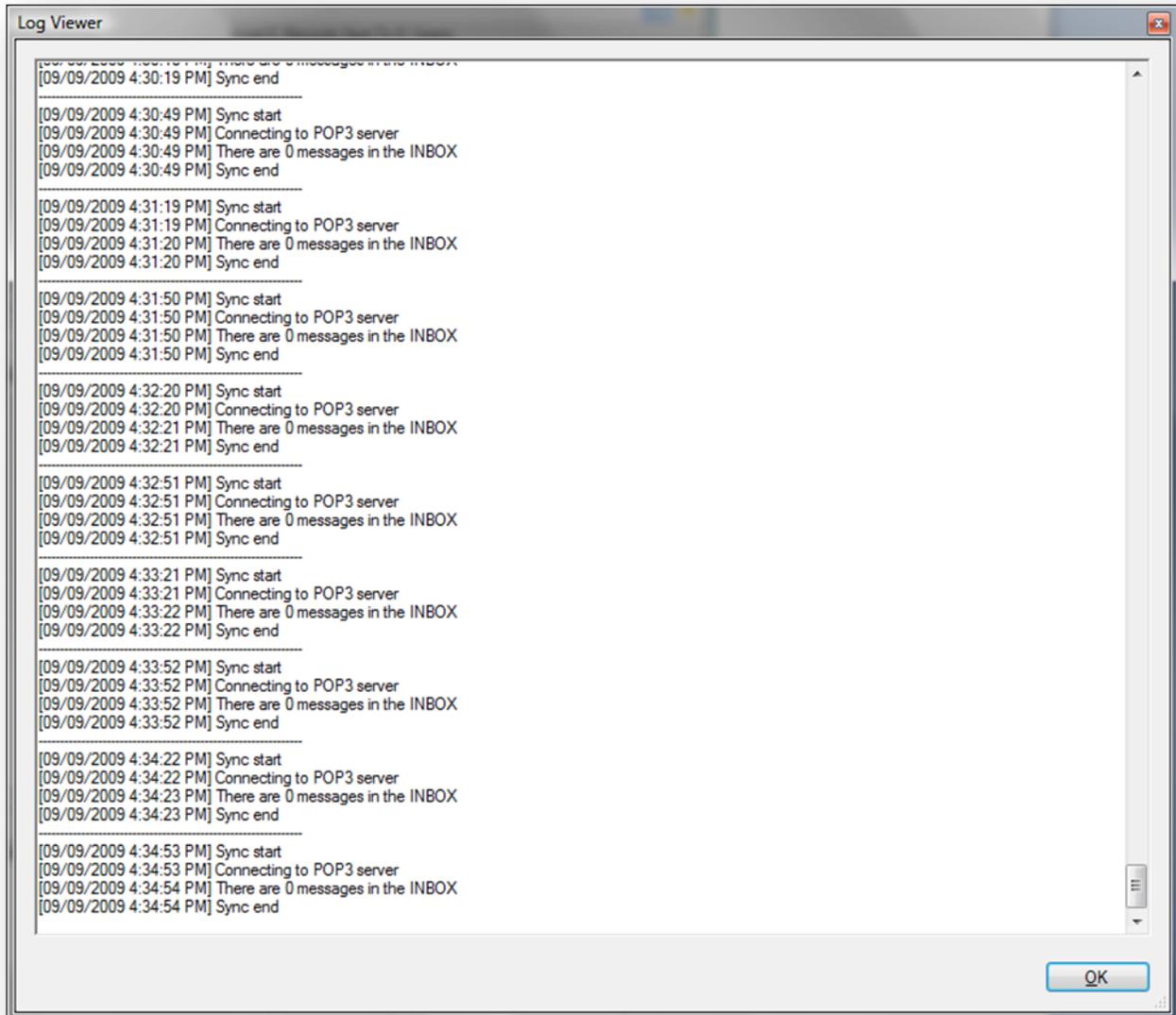
Figure 12 - Viewing the Sync Log

The other log, the application log, will show any major system issues or starting/stopping of the application.

Email issues and the Connector

Because the system relies on email transport, there are often two issues that arise when configuring the Connector to be used within the organization:

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Further Assistance

If you have completed reviewing this user reference guide and still have issues getting the Connector functioning properly, please email support@skysoftsystems.com with details about your particular issue.