

Implementing Windows SharePoint Integration

One of the significant features of Visual Intercept 3.6 is integration to Windows SharePoint Services for document management. The integration to Windows SharePoint allows your organization to leverage the document management capabilities of Microsoft Windows SharePoint for documents attached to items in Visual Intercept.

This allows you to keep requirements, specs, test plans, log files, screen captures, and other documents in a system that supports document collaboration while having them accessible from incidents, projects, and other items in Visual Intercept.

Configuration

For Visual Intercept Web and Web Relay, the integration settings are specified per website. For the Visual Intercept desktop client the settings are specified per client. Because the settings are identical we will use the configuration in Visual Intercept Web as an example.

There are three settings required for the SharePoint integration:

1. The location of the document library.
2. The document folder that will serve as the root folder Visual Intercept users will be able to access.
3. The default SharePoint credentials the web site will use to access the SharePoint library.

To configure Visual Intercept so that it points to your SharePoint Document Library and Folders, launch the Visual Intercept Web Administrator and select Tools|Configure from the Navigation menu.

Under the Documents Manager section of the Integration tab, specify the following:

- **Document Library URL** – This is the URL to the document library on the Server running SharePoint. The default document library name for WSS is "Shared Documents" and the default name for SharePoint Portal Server is "Document Library"
- **Document Folder Name** – This is the name of the folder in the document library that will serve as the root document folder. When attaching documents, Visual Intercept users will be able to browse all folders beneath the root.
- **Relay Document Folder Name** – This setting allows you to specify the folder documents are placed in when they are attached from Web Relay. Because Relay is a product intended for users such as beta testers or customers who are not an immediate part of your team, documents attached by Relay users are added to the Relay Document Folder, and the Relay user is never allowed to browse the folder structure. This design prevents Relay users from having access to documents they should not have access to and prevents them from becoming confused by a folder structure that might not make sense to them. The Relay Document Folder must be a child of the Visual Intercept Document Folder.
- **Default SharePoint Credentials** – These are the default Windows credentials the application will use to access SharePoint. These credentials are used to load the folder structure and as a fall back if the credentials specified by the client fail when attaching a document.
- **Use Windows Authentication for SharePoint** – When this option is enabled the integration will attempt to authenticate to SharePoint using the Windows credentials passed by the client browser to the web server. The ability to use this option successfully may depend on factors specific to your network environment.

Documents Manager

Directory:	C:\Program Files\Visual Intercept Enterprise\docs
Temp:	C:\Program Files\Visual Intercept Enterprise\temp
Document Library URL:	http://<SPS server IP address>/Document Library
Document Folder Name:	<Name of Document Library for the Site>
Relay Document Folder Name:	<Name of Document Library for Relay Users>
Default SharePoint Credentials:	
UserID:	Default SharePoint User
Password:	●●●●●●●●
<input type="checkbox"/> Use Windows Authentication for Sharepoint	

Note: Once the SharePoint integration is enabled, all document attachment performed within Visual Intercept will use the Windows SharePoint document library. However, documents previously attached using the file system based integration will still be accessible.

SharePoint Integration Logon Methods

There are several ways to get working security credentials for SharePoint integration.

Logon Methods:

1. The viSharePoint.dll can be told what security credentials should be used by Administrator settings.
2. The viSharePoint.dll can be told what security credentials should be used by user profile settings.
3. The viSharePoint.dll can use DefaultCredentials to be used by the process it operates under.
(IUSR_MachineName/Browser)

Logon is implemented is in a cascading scheme and checks in the following order:

1. If the Administrator has specified Use Windows Authentication, then no UserID and password is handed to the viSharePoint.dll. (Logon Method 3)
2. If the Administrator has NOT specified Use Windows Authentication then, if specified, the user profile document library UserID and Password are used. (Logon Method 2)
3. If the Administrator has NOT specified Use Windows Authentication then, if specified, the Administrator document library UserID and Password is used. (Logon Method 1)
4. If the Administrator has NOT specified Use Windows Authentication then, if neither the user profile nor Administrator UserID and Password is specified, windows authentication is used. (Logon Method 3)

Note: If the viSharePoint.dll is not handed a UserID (which the Use Windows Authentication prevents) then Logon Method 3 is used.

Adding your SharePoint UserID and Password to your User Profile

Once you have enabled SharePoint integration in the Visual Intercept Administrator, depending upon the authentication logon method you employed, the last step is to have your users specify their SharePoint credentials in the Visual Intercept Web Manager.

In Visual Intercept Web, select Options|Settings from the Navigation menu and, at the bottom of the General tab, enter the UserID and Password supplied by your Visual Intercept Administrator and Update your changes.

Document Library Logon Options

UserID:	<input type="text" value="domain\userid"/>
Password:	<input type="password" value="●●●●●●"/>

File attachment using Windows SharePoint Integration

With your SharePoint integration configured, you are now ready to begin relating documents to Visual Intercept Incidents and having those documents stored in the specified SharePoint Document Folders.

The integration supports two distinct modes of attaching documents to items in Visual Intercept:

1. **Attaching a File** - Allows a local file to be attached to an item in Visual Intercept and added to a specific folder in the SharePoint library. This mode is most commonly used when a document is generated by the client and it needs to be attached to an item and added to a folder in the document library.
2. **Add SharePoint Link** - Allows the client to browse the document library and choose existing documents in the library to attach to items in Visual Intercept. This mode is most commonly used when there is a current version of a document stored and revised within SharePoint which needs to be attached to items in Visual Intercept. For example, you could attach the same specification document to multiple incidents in Visual Intercept, and users accessing that document from those incidents will always retrieve the most current version.

To attach a file to an Incident:

1. Open the Incident document and select the Documents tab.
2. Click Add File.
3. In the Select a File window, click Browse to locate the file you wish to attach.
4. Enter descriptive comments for the file. [Optional]
5. Using the Destination Folder in SharePoint combo-box, select the folder you wish to place the file.
6. Click Attach.
7. Select Actions | Update from the Navigation menu or click update button.

Attach a document - Microsoft Internet Explorer

Incident ID: 100

Select a file:

Comments:

Destination Folder in Sharepoint:

- Document Library/SPS Test Library
- Document Library/SPS Test Library/Screenshots
- Document Library/SPS Test Library/Relay
- Document Library/SPS Test Library/Misc
- Document Library/SPS Test Library/Technotes
- Document Library/SPS Test Library/Specs
- Document Library/SPS Test Library/Requirements

Requirements

The integration requires that you have either Windows SharePoint Services (WSS) or Windows SharePoint Portal (SPS) services running in your environment. If you don't have the need for a web portal solution WSS is

the preferred option since it is a component of the Windows 2003 Server operating system and does not require any additional license. To learn more about the differences between WSS and SPS visit the Microsoft SharePoint website. Visual Intercept and SharePoint do not need to be installed on the same computer.

If you have other questions about issues not included in or beyond the scope of this Tech Tip, please contact Elsinore Technical Support Services at support@elsitech.com or 866.866.0034, option 2.