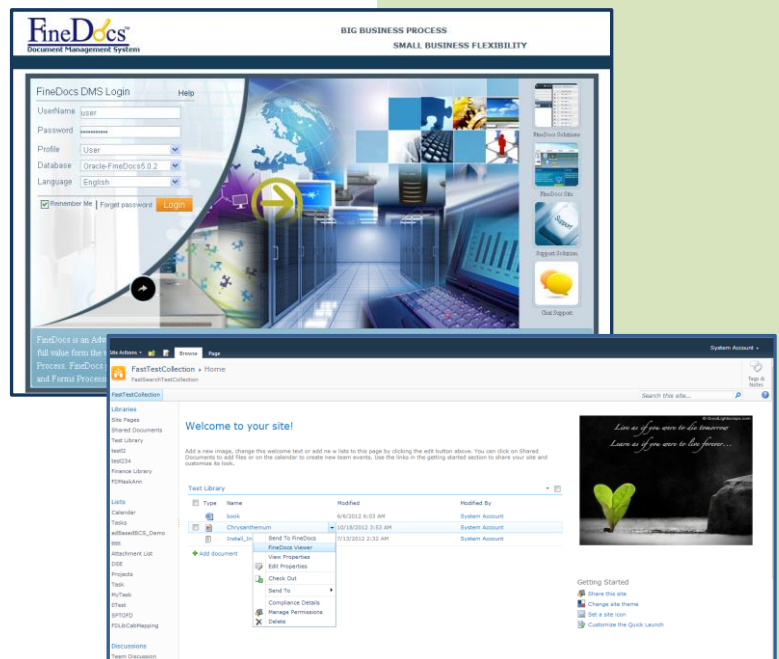# FineDocs SharePoint Connector

Integration of Microsoft SharePoint and FineDocs

SharePoint integration with FineDocs Document management system is to focus the customers managing large volume of documents using SharePoint interface providing an enterprise solutions on ECM capabilities with seamless access to the business critical contents from centralized content repository.
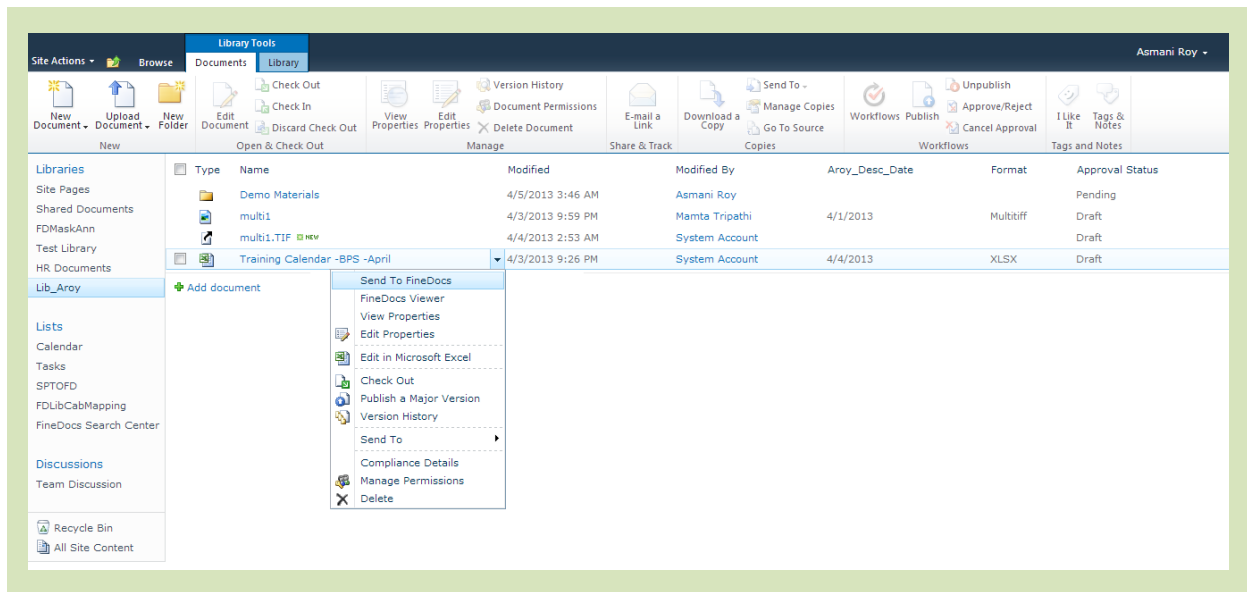
FineDocs SharePoint integrated system provides SharePoint users ease of use of document management from the SharePoint site and they can also leverage the ECM features with complete document life-cycle management and archival solutions.

Document Synchronization

The feature is intended to help users to push the SharePoint documents to FineDocs centralized repository. Once the business process activities with the document are complete and the document / record are ready to archive, users can send the document to the common repository. The available (pre-defined) retention policy will be attached to the record and the document/record will be ready for archival. This document will always be available while searching from SharePoint interface using Enterprise Search.

The complete life-cycle of the document along with the checkout check-in audit history and all versions of the document will be moved to FineDocs. The content types and the metadata will also be moved to FineDocs along with the document.

Folder Synchronization

The feature is intended to help users to push the SharePoint Folders to FineDocs centralized repository. All subfolders along with all documents under the folder tree will be moved to FineDocs. The available (pre-defined) retention policy will be attached to the folder and the document/records under this folder will be ready for archival. The folders and all the documents under the folders will always be available while searching from SharePoint site using Enterprise Search.
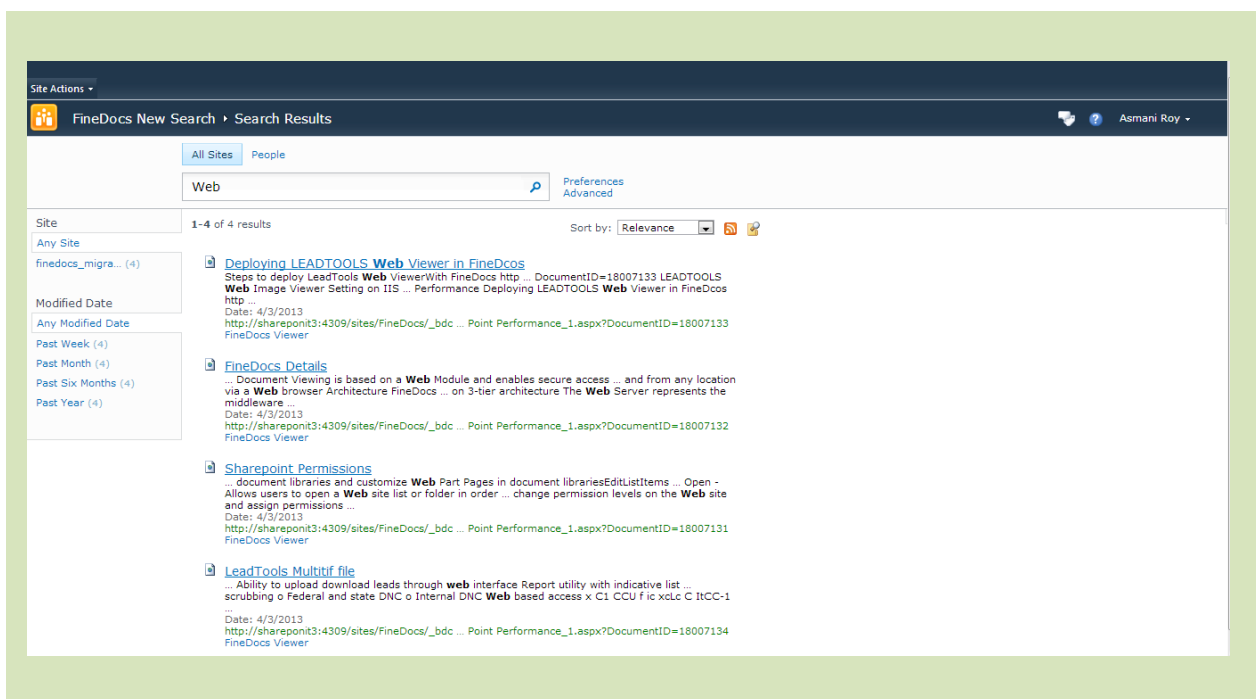
The complete life-cycle of the documents under the folders along with the checkout check-in audit history and all versions of the documents will be moved to FineDocs. The content types and the metadata will also be moved to FineDocs along with the document.

Enterprise Search

The feature is intended to help users to search all SharePoint documents as well as FineDocs documents from FineDocs centralized repository using SharePoint FAST Search interface.

FineDocs SharePoint integrated Search provides a powerful search to easily locate the integrated FineDocs content and metadata store; Presents a unified interface of search retrieval i.e. Searched contents will be from both SharePoint and FineDocs.

Search is based on Full Text Content, Dataclass or Content Type, Descriptors or indexed metadata, Document name, Keywords, Notes. FineDocs Document Viewer Web Parts is available to view the Searched documents with full FineDocs security enforcement.
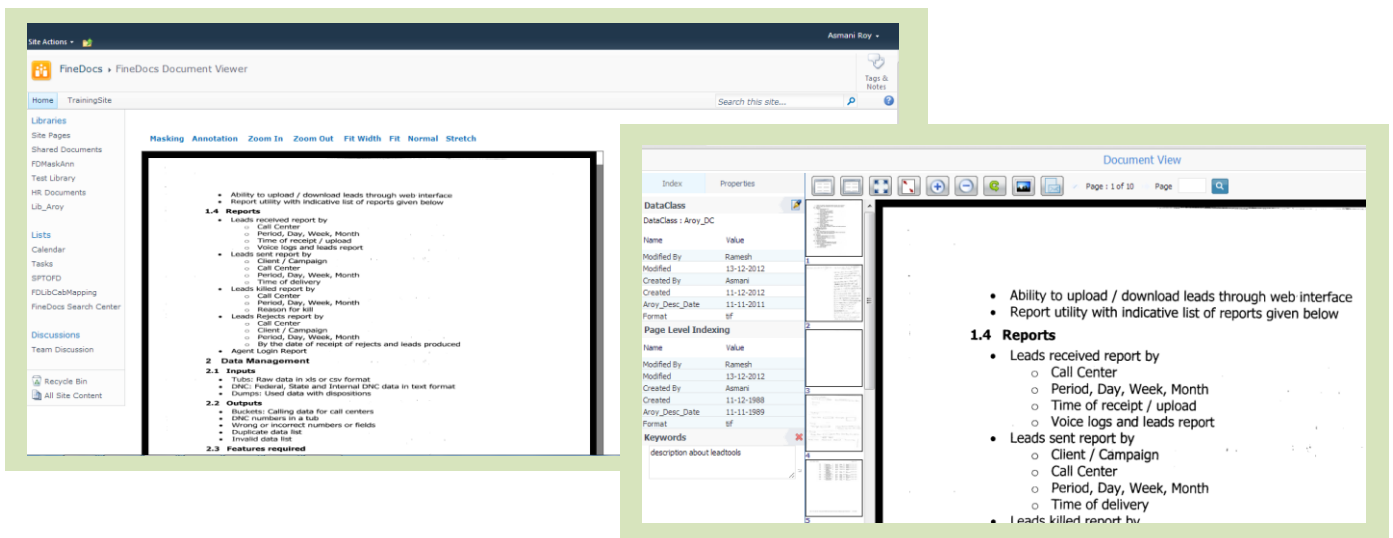

Collaborative Workplace

FineDocs-SharePoint integration is a seamless two-way integration to work on a centralized collaborative workspace providing ease to manage document, contents and records. Even after moving documents from SharePoint to FineDocs, SharePoint Users can still work with the contents stored in FineDocs. That means the users can browse the FineDocs repository through SharePoint site and perform all document level operations on retrieved documents based on privileges. E.g. Modify, Check-in Checkout, access all versions of the documents, download, mail documents, attach notes, put annotation on document (on Image type documents only) and view report on the document using SharePoint Interface. This collaborative workspace is available with full FineDocs security enforcement.

Universal Viewer

SharePoint displays the documents in the native viewer only; that means end users must have Office Document applications(Ms-Office, Open-Office), Adobe Acrobat Reader installed on their machines to view the MS-office, PDF documents, etc.

FineDocs provides a powerful Universal Viewer for all types of Office documents, PDF documents along with all types of images. User will be able to view these documents in a non-editable image format. This feature will be configurable. User can click on the FineDocs Viewer hyperlink in the SharePoint library interface to open the FineDocs Document viewer.

User can put Annotation/markup on the images. Masking/Redact is also allowed on the images.

Retention and Archival

The feature is intended to help users to manage large volume of documents once the life cycle of documents are completed. During Document synchronization, all SharePoint documents moved to FineDocs Repository ensuring continuous access from SharePoint portal site.

Based on retention and disposal policy associated with the document repository i.e. Cabinet or Folder or Indexing date of archived documents, the documents will get archived and offline from the system.

Audit Trails

All activities on the documents accessing from SharePoint site to FineDocs repository are audited and a detailed Audit log Report is generated. The Audit Trails will be on following activities:

- Document archival from SharePoint to FineDocs
- Document View from FineDocs repository through SharePoint portal
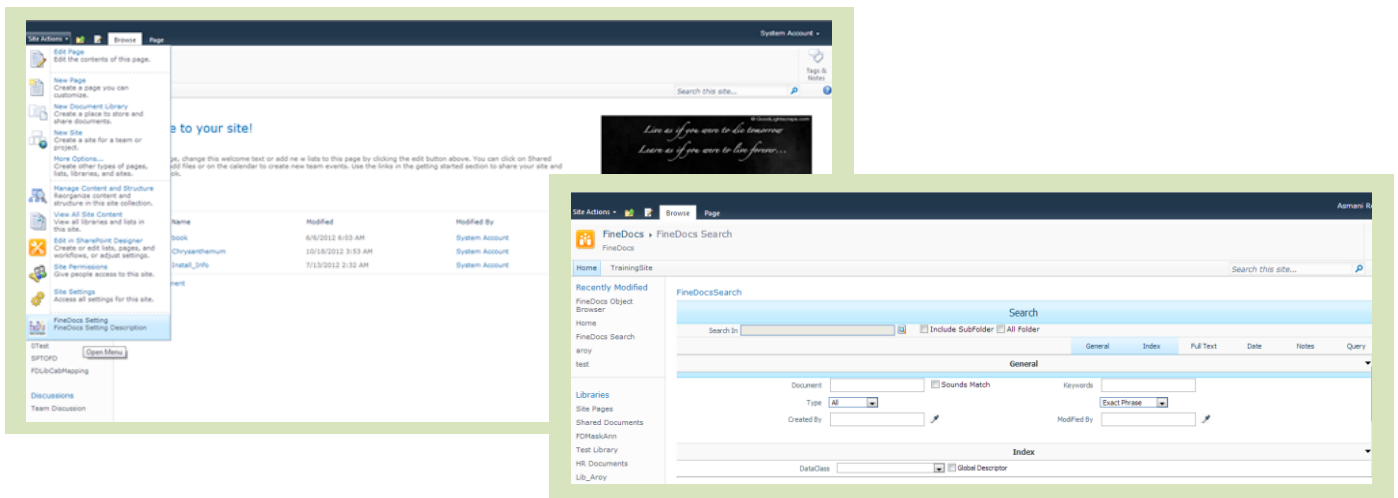- Document Level operations e.g. check-in, check out, Annotations etc.

Deduplication

SharePoint Administrator can configure the deduplication of Documents in SharePoint and FineDocs i.e. maintaining a single copy of the document in the FineDocs repository but accessing this from SharePoint site as well as FineDocs site. This is a most effective cost-benefit approach to save storages. Once the document archiving is complete, i.e. users sent the documents and folders from SharePoint to FineDocs using SharePoint interface, the document link can be replaced by a Reference URL of FineDocs repository. Whenever they click the URL, the document will be directly open from FineDocs repository.

Web Parts

FineDocs DMS Features are also accessible through SharePoint interface using Web Parts :

- Cabinet Administration
- Object Browser
- Search & Document Viewer

Security

SharePoint users are integrated with Active Directory. FineDocs will also use Active Directory authentication as SharePoint. Single sign on is implemented to access FineDocs Web Parts from SharePoint interface. All SharePoint users have same role based access to FineDocs repository.

All history of user access along with document Management and workflow activities integrated with FineDocs will be audited and the complete Audit Trails will be available in the system.

All DMS activities will be based on Privileges as assigned by Administrator or Group Manager. SharePoint Users roles and authorizations will also be synchronized to the FineDocs.