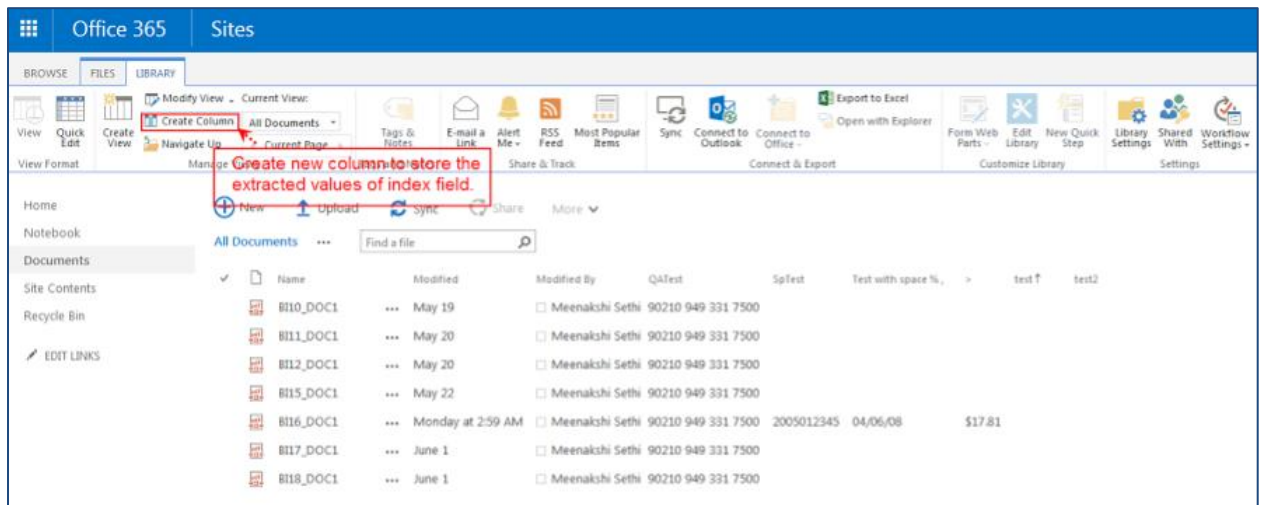# Export to SharePoint 365

A new plugin "SHAREPOINT_365_EXPORT" is introduced for exporting the documents to an online SharePoint repository. User can configure the export for each Document Type and connection settings in both online and offline mode. But for exporting the documents, connection with the SharePoint account is required. The PDF and TIFF files are exported to the online SharePoint repository along with the meta-data configured. Also, the failed export (in ERROR state) can be restarted to resume the export. Resuming the export will override the already exported data to avoid duplicity.

In order to export documents to the online SharePoint repository, you will have to configure the SharePoint site as well as the SharePoint 365 Export Plugin in the Ephesoft environment.

Configuration in SharePoint

1. Create a new Site in SharePoint 365 site. This will be your relative site URL.
2. Create a Document Library in the newly created site. This will be your relative folder path. The default path will be - Shared Documents/Document_Library_Name.
   All the documents (multiple document type) and meta-data (index field value) will be exported to this repository.
3. Under the Document Library, go to Library and create new Column. This column will hold the exported meta-data i.e. the index field value of the corresponding document (PDF/TIFF).
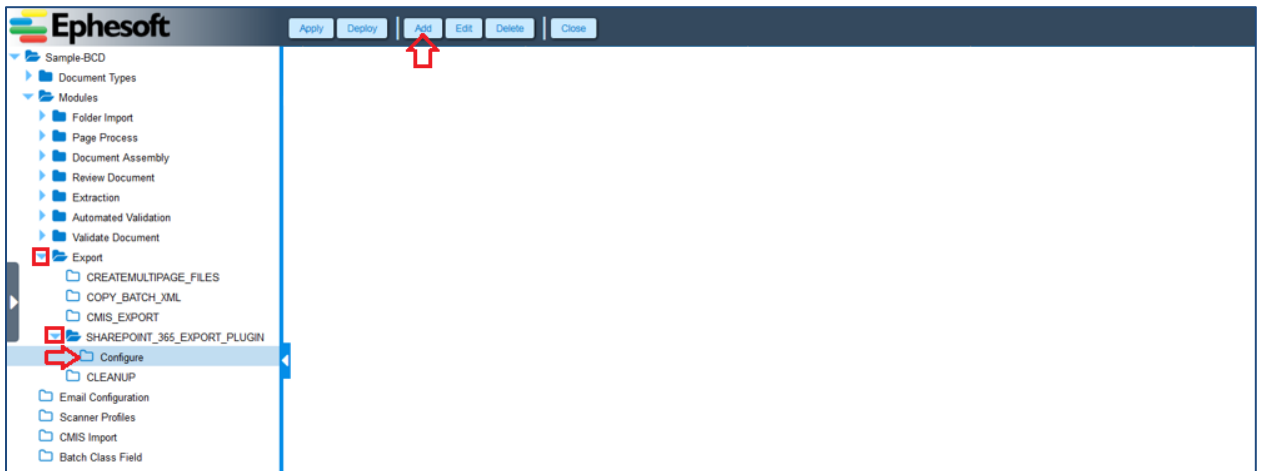

Create multiple columns depending upon your requirement. For example, if there are 2 Document Types say DType1 and DType2 with 5 index fields each. And you want to export 2 index fields for the first Document Type and 1 index field for the second Document Type, then you need to create 3 columns in the SharePoint Document Library. On export, the Document Type will show the documents (PDF/TIFF) along with the exported meta-data (index fields) as per the configuration.

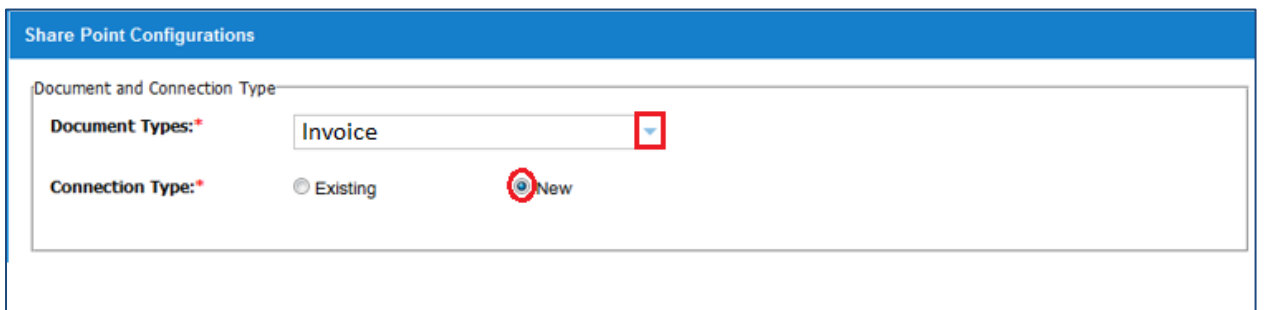# SharePoint 365 Export Plugin Configuration in Ephesoft

1. Enable/Disable the SharePoint Export Switch. If you want to automatically export the executed Batches to the online SharePoint site configured, then turn this switch ON.

2. Configure the Document Type and connection settings to the SharePoint repository. You will have to configure settings and mappings for each Document Type separately.

In order to configure the SharePoint Export Plugin for a Document Type under the selected Batch Class:
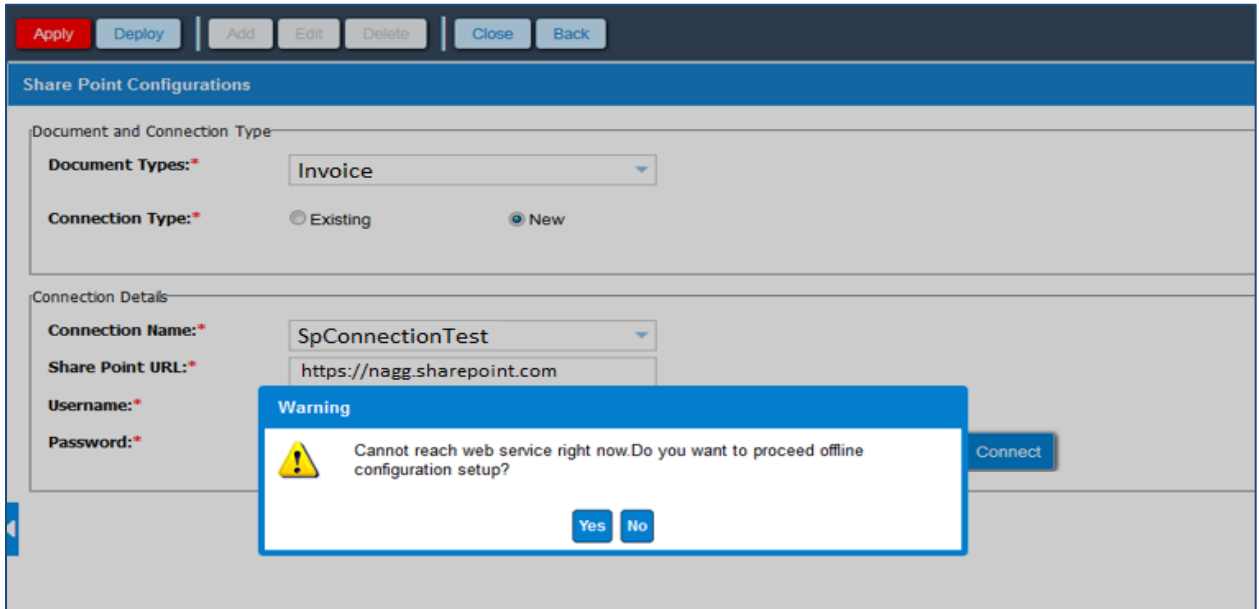
1. Go to **Export >> SHAREPOINT_365_EXPORT_PLUGIN >> Configure**
   And click on **Add** button to open the SharePoint Configuration window.
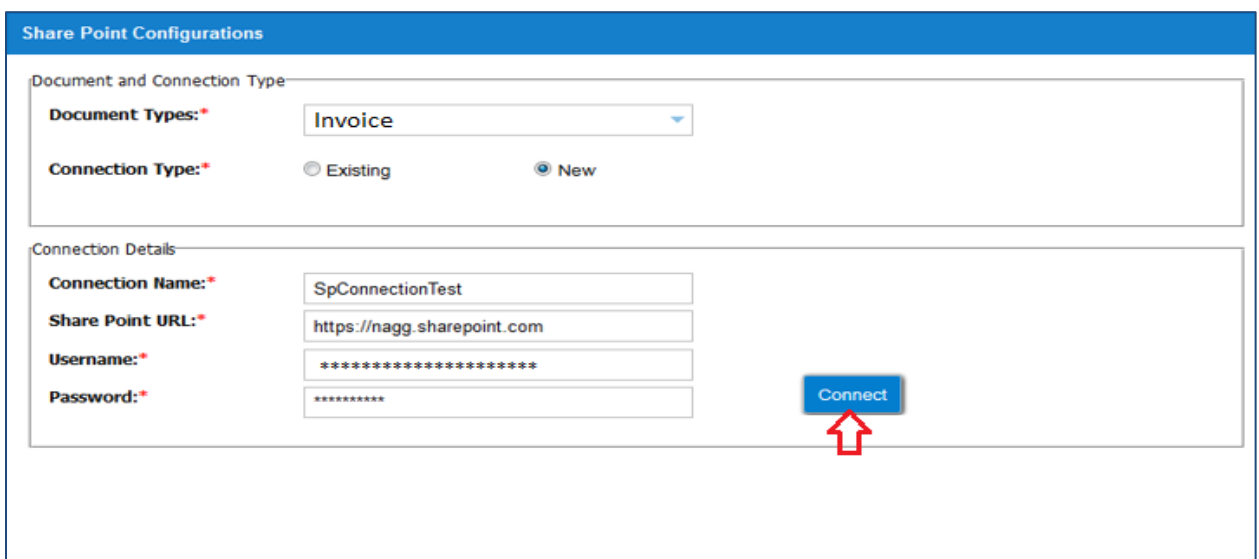

2. Select the **Document Type** from the list of document types available in the selected batch class.

3. Select the **Connection Type** as **New**, if you are configuring export to SharePoint repository for the first time. If you have already configured connection for the selected Batch Class, then you can go by selecting the connection type as **Existing**.

4. By clicking on new, Connection Details tab becomes visible.
   Give a name to the **Connection**, enter the SharePoint Site **URL**, **Credentials** (username/password) and click on **Connect** button to connect to the SharePoint Server.
   You can configure connection both in online as well as offline mode.

5. If you are offline, the application allows you to configure the connection settings even if the SharePoint sever is not reachable. In that case, the application will prompt you to confirm the configuration setup in offline mode.

6. In case you are online, the application will check for connection settings by clicking on Connect button.

7. On successful verification, the Export Settings tab becomes visible wherein you can configure the export **site**, **repository** (destination folder) and **artifacts**.
Give the **SharePoint Site URL**, **Document Library Path**, and **type** of Export (PDF, TIFF or Both).
And click on **Fetch Metadata**.

8. By clicking on Fetch Metadata button, Mapping Metadata Configurations tab becomes visible. It will fetch all the index fields for the selected document type and the columns created in the SharePoint repository. You can now map the index fields to the corresponding column (SharePoint Metadata) for export to the repository.

9. Select the Index Field and corresponding Meta-data (column in SharePoint repository).
Click on **Add Mapping**.

It is recommended to verify the index fields (Ephesoft) and columns (SharePoint) are compatible before mapping. SharePoint allows column validations but Ephesoft cannot validate the data type of index fields with the mapped column and may result an error during the execution of batches.
For example, if an index field of data type 'string' is mapped to a numeric column in SharePoint, the Ephesoft application does not have any mechanism to validate that the mapping is correct or not. Hence, mappings should be done keeping this in mind.

10. Perform the above step for all the index fields to be exported to the SharePoint repository. Once all the fields are mapped to the SharePoint columns, click on **Apply** and then **Deploy** button to apply the configurations.