

ERP-Link iNet.DM 4.0 Administrator Guide



Title: ERP-Link iNet.DM 4.0 Administrator Guide

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1 Preface

Gimmal delivers market-leading content governance and compliant records solutions built on Microsoft® SharePoint®. Gimmal solutions drive user adoption and simplify information access by making information lifecycle management of content simple and transparent. This method ensures consistent, enterprise-wide compliance and proactive litigation readiness while lowering costs.

ERP-Link Suite for SharePoint and SAP brings the functionality and content owned by SAP to the SharePoint audience, and vice versa. With an ERP-Link enabled application, you can choose where you want your people to work: in SAP, in SharePoint, or both.

1.1 Who Should Use This Guide

The intended audience for this document consists of SharePoint Administrators. Administrators are considered to be SharePoint power users who are familiar with the enterprise's content management and retention policies. This guide contains detailed steps for the administration of ERP-Link iNet.DM product for SharePoint 2010, SharePoint 2013, and Office 365 SharePoint Online.

2 SharePoint Prerequisites

This Administration Guide assumes that you have the following items existing:

- SharePoint installed and functional (e.g. SharePoint 2010, SharePoint 2013, or Office 365 SharePoint Online)
- SharePoint Site Collection

3 Installing iNet.DM

3.1 CSOM Deployments (e.g. Office 365 SharePoint Online)

3.1.1 Deploying the iNet.DM SharePoint App into the SharePoint App Catalog

1. From Apps for SharePoint page, click **Upload**, then browse to the appropriate app file from the **Add a Document** dialog box.

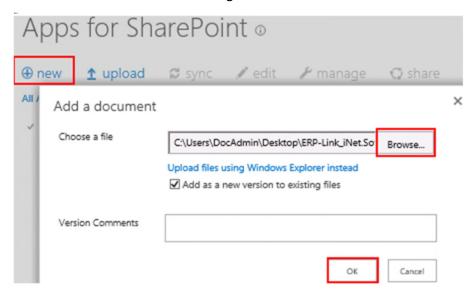


Figure 3-1 Add a Document Dialog Box

2. Click OK.

The application displays in the Apps for SharePoint page.

Apps for SharePoint o

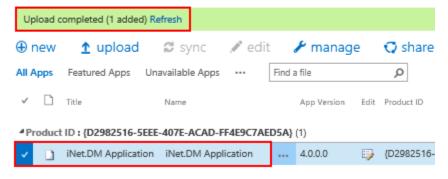


Figure 3-2 Apps for SharePoint Page

- 3. Generate an App Identity with *appregnew.aspx*. This must be completed for each tenant using the app.
 - a. Go to <a href="https://<your_sharepoint_site>/layouts/15/appregnew.aspx">https://<your_sharepoint_site>/layouts/15/appregnew.aspx.
 - b. On this page, either generate the appID/clientID or use an existing clientID. If using an existing clientID, verify that all the letters of the clientID are lowercase.
 - c. Define a client secret on this page.
 - d. Copy the client ID and client secret.

Your app now has a secret that the SharePoint server knows and that CloudGate clients must also know.

3.2 Installing iNet.DM on either SharePoint WFE (SSOM Mode) or CloudGate Server (CSOM Mode)

3.2.1 Installing the iNet.Runtime

The ERP-Link iNet.Runtime is used by various products within the ERP-Link product suite. The ERP-Link iNet.Runtime becomes a hard requirement when the iNet.DM Enterprise version is used and the DSMs (Document Service Modules) add-ons are used as well. However, the iNet.Runtime is also required for the iNet.DM Basic version (i.e. without the DSMs) when SAP barcodes are to be used and supported.

Navigate to run the *iNet.Runtime.msi* located within the folder you installed iNet.DM, right-click and choose **Install** from the context menu.

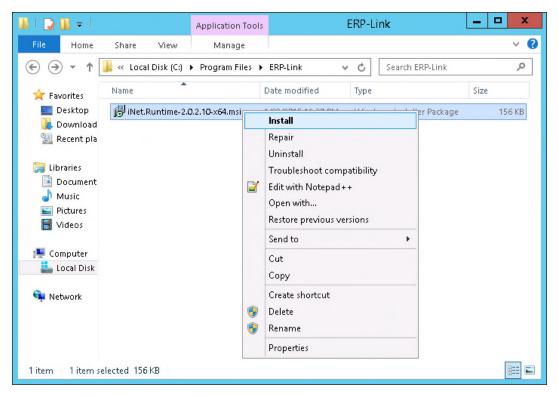


Figure 3-3 Installing .Net.Runtime.msi

Note: No further user interaction is necessary. You can verify its installation via the Programs and Features section of the Control Panel.

3.2.2 Running the iNet.DM Installer Wizard

1. Run the iNet.DM installation package by right-clicking the included *iNetDM_....exe* application and selecting Run as administrator.

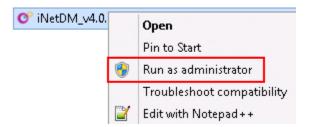


Figure 3-4 Choosing Run as administrator

2. On the End-User License Agreement panel, read the terms and conditions, click the lacept the terms in the License Agreement option, then click Install.

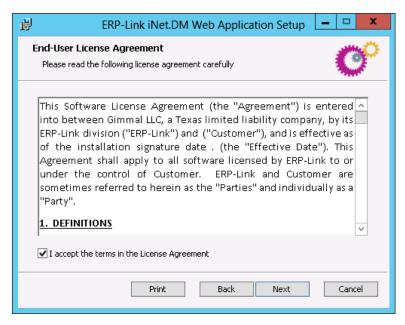


Figure 3-5 Master Agreement Panel

3. On the **Welcome** panel of the Application wizard, click **Next**.



Figure 3-6 Welcome Panel

4. On the **Select iNet.DM License File** panel, browse to the license file and select the XML file, and then click **Next**.

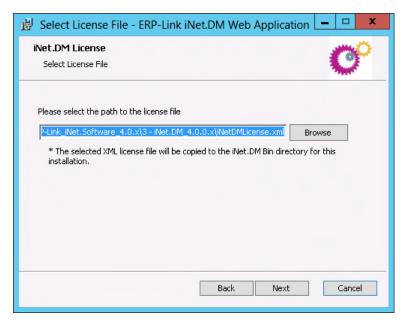


Figure 3-7 License Panel

5. On the **IIS Settings** panel, enter the IIS configuration by choosing the website and Application pool you want to use, and then click **Next**.

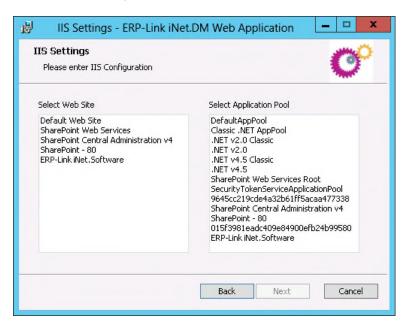


Figure 3-8 IIS Settings Panel

Note: The only difference between installing on the SharePoint WFE (i.e. SSOM mode) or the CloudGate server (i.e. CSOM mode) is here when we select the website.

- When installing in SSOM mode, select a website that is tied to a SharePoint website.
- When installing in CSOM mode, the website you select does not have to be a SharePoint website because SharePoint is NOT installed (or relied upon) by the ERP-Link software running on the CloudGate server.
- 6. On the IIS Settings panel, confirm your IIS selections, and then click Next.

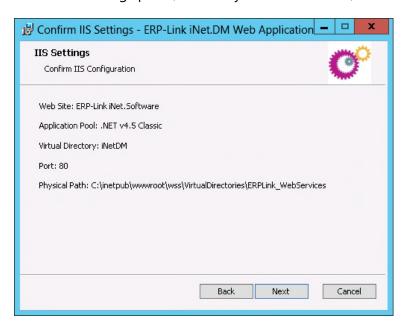


Figure 3-9 IIS Settings Panel

7. On the **Destination Folder** panel, confirm the path to the default folder you want the ERP-Link iNet.DM Web Application installed, and then click **Next**.

Note: Typically, the default is accepted.

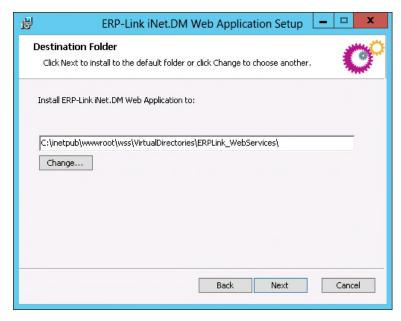


Figure 3-10 Destination Folder Panel

8. On the **Ready to Install** panel, click **Install** to begin the installation.

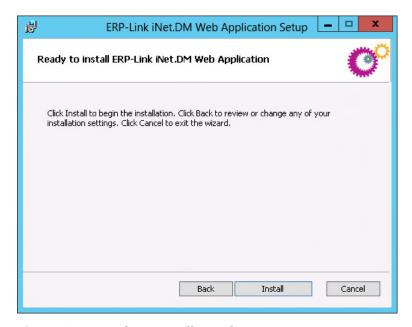


Figure 3-11 Ready to Install Panel

9. On the Completed panel, click Finish.

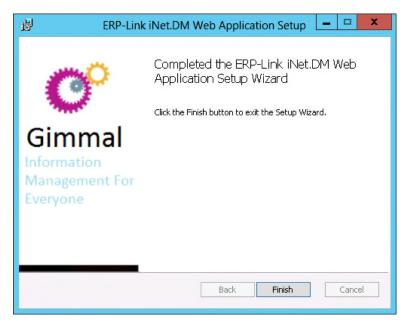


Figure 3-12 Completed Panel

3.2.3 Enabling Anonymous Authentication



Figure 3-13 ERP-Link iNet Software Node

2. Double-click Authentication.

3. Ensure the Anonymous authentication is **Enabled**.



Figure 3-14 Enable Authentication Pane

Note: SAP HTTP / HTTPS communication does not support any authentication scheme – Anonymous has to be enabled for SAP to communicate with the web server.

4. Click **Edit...** and ensure that iNet.DM's anonymous impersonation is running as the Application Pool user account.



Figure 3-15 Edit Authentication Pane



Figure 3-16 Enable Authentication Pane

5. Click **OK**.

3.2.4 Deploying the *ERP-Link Site Columns and List Template* Feature for SharePoint 2010 and SharePoint 2013 SSOM Mode

This Feature creates Site columns and a List Template for creating iNet.DM document libraries for only SharePoint 2010. See the standard Microsoft MSDN documentation for deploying a Feature.

3.2.5 Creating iNet.DM SharePoint Document Library (i.e. Repository)

Note: The following screenshots are for SharePoint 2013. Similar instructions will be relevant for SharePoint 2010.

- 1. Return to the SharePoint site that you installed iNet.DM under.
- 2. Click **Add an App** and select the iNet.DM Document library option.

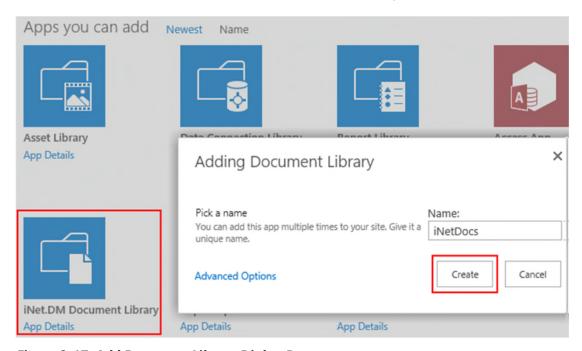


Figure 3-17 Add Document Library Dialog Box

3. On the Adding Document Library dialog box, enter the name of the new library, then click **Create**. For example, *iNetDocs*.

The new library displays on the Site Contents page.

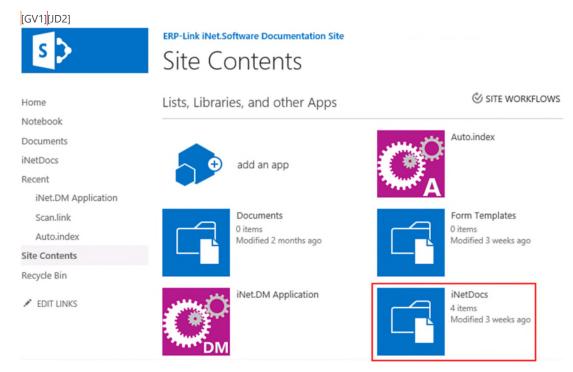


Figure 3-18 Site Contents Page

4 Configuring iNet.DM with the ERP-Link Administration Console

4.1 Selecting Deployment Mode for CSOM or SSOM

- 1. From the ERP-Link Administrative Console, open the ContentRepositoryConfig.xml file.
- 2. Click the **(Must have a name)** node, then define the connection name. In this example, *iNetDM_O365*

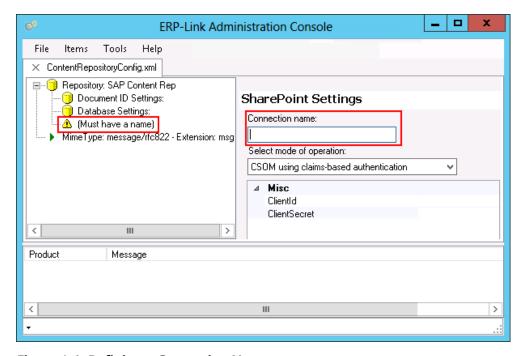


Figure 4-1 Defining a Connection Name

3. From the **Select mode of operation** drop-down list, choose the appropriate mode.

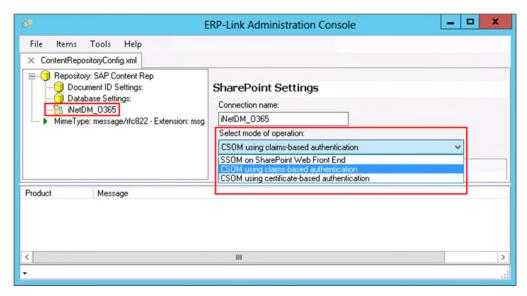


Figure 4-2 Selecting Mode of Operation

- 4. Depending upon the mode selected, additional information will be required. For this example, select **CSOM using claims-based authentication**.
- 5. In the **Misc** pane, enter the **ClientId** and the **ClientSecret** you saved from the installation of the SharePoint app.

Additionally, you can select the following modes of operation:

- CSOM using certificate-base authentication
- SSOM on SharePoint Web Front End (used for on premise deployments)
- 6. From the **File** menu, choose **Save**.

4.2 Configuring the iNet.DM Document Library Repository

- 1. From the ERP-Link Administrative Console, open the ContentRepositoryConfig.xml file.
- 2. Select the Repository node.
- 3. In the Details pane, replace the values to the example values below:

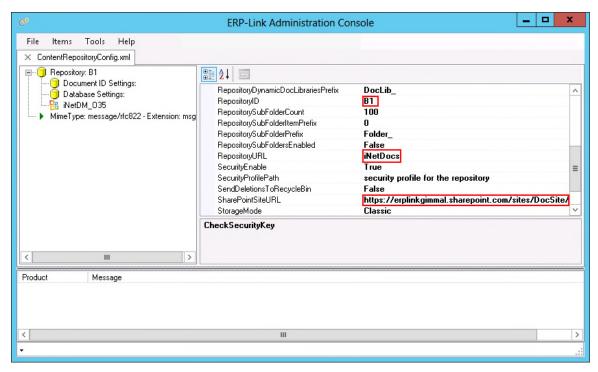


Figure 4-3 Administration Console

- RepositoryID: the Content Repository ID that will be used in SAP
- **RepositoryURL**: the name of the document library that will store documents that are linked to SAP transactions/objects
- SharePointSiteURL: the location of the SharePoint Site Collection
- 4. From the **File** menu, choose **Save**.

See also,

ContentRepositoryConfig.xml Entries.

4.3 Enabling the Tracking Database (Optional)

The iNet.DM Tracking Database is an optional feature that is especially used when the customer has a *very large SharePoint information architecture* and documents are routed (using the ERP-Link DSM products) to different SharePoint locations based on metadata routing rules.

The iNet.DM Tracking Database is also used when the SharePoint Document ID feature is utilized.

- 1. From the ERP-Link Administration Console, open the ContentRepositoryConfig.xml file
- 2. Select the **Database Settings** node.
- 3. In the **Misc** pane, select **True** (Enabled) from the **TrackingEnabled** drop-down list. The **False** option will disable the Tracking Database.

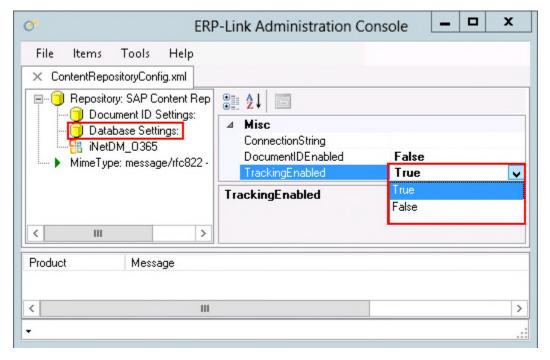


Figure 4-4 Tracking Enabled

Note: If the SharePoint Document ID feature is also used, then select True (Enabled) from the DocumentIDEnabled drop-down list.

4. From the **File** menu, choose **Save**.

5 Configuring SAP

5.1 Creating a New Protocol (SAP T-Code OAA3)

1. In the ribbon, type /noaa3, then press Enter.

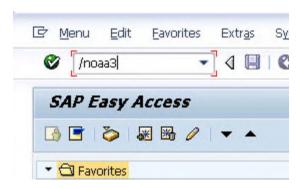


Figure 5-1 SAP Ribbon

2. Click the **New Protocol** button at the top left of the ribbon.

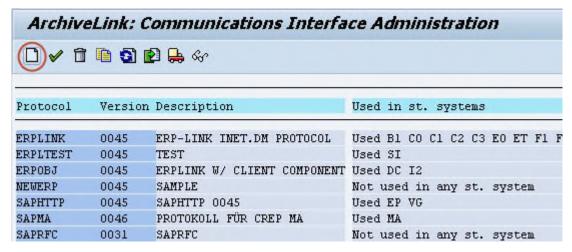


Figure 5-2 Create Protocol Button

3. In the **Create New Protocol** dialog box, enter values similar to the following example:

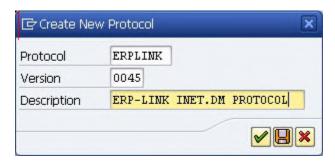


Figure 5-3 Create New Protocol Dialog Box

Note: The **Version** field represents the HTTP Content Server interface version that is to be used.

4. Click the **Save** button ().

5.2 Creating the Content Repository (SAP T-Code OAC0)

- 1. In the ribbon (*Figure 5-1*), type **/noac0**, then press **Enter**.
- 2. On the ribbon, click the **Change/Display** button, then click **Create**.

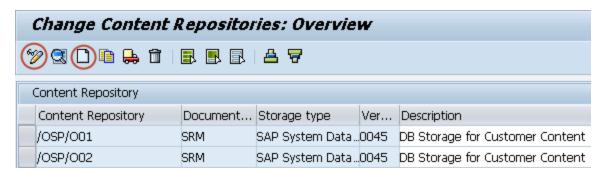


Figure 5-4 Change Content Repositories Overview

3. On the Detail page, click **Full Administration**, and enter values similar to the following example:

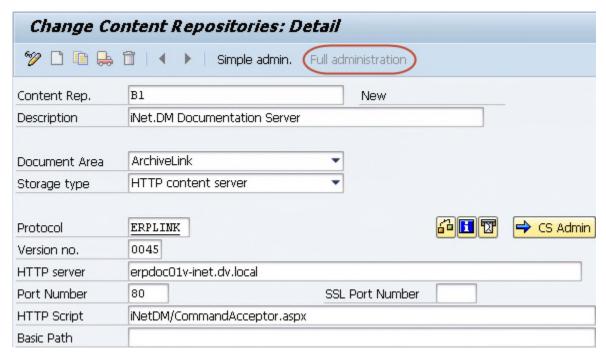


Figure 5-5 Content Repository Details

- Content Rep.— enter in the defined Content Repository ID, which will match with what is identified in the iNet.DM configuration XML file (e.g. ContentRepositoryConfig.xml). In the example above, it is **B1**.
- Description enter in the description of the Content Repository
- Document Area select the **ArchiveLink** option
- Storage Type select the HTTP Content Server option
- Protocol enter in the protocol created in OAA3 above
- Version no. enter in the version of the Content Server that is to be used
- Port Number enter in the network port number that the iNet.DM web application is using to receive SAP document requests
- HTTP Script enter as shown in the example in *Figure 5-5* above
- 4. Click the **Save** button () to save the configuration.

5.3 Creating Global Document Types (SAP T-Code OAC2)

- 1. In the ribbon (*Figure 5-1*), type **/noac2** to create SAP ArchiveLink Document Types.
- 2. Create a new Global Document Type.
 - a. On the Global Document Types: Overview screen, click the New Entries button.

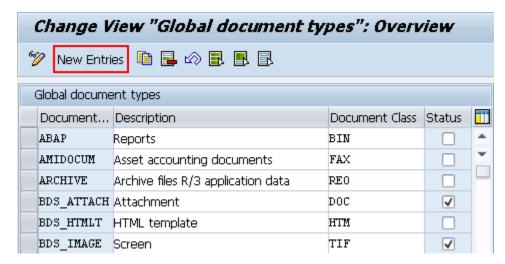


Figure 5-6 Global Document Types

The New Entries screen displays.

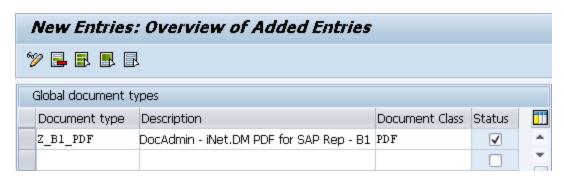


Figure 5-7 New Entries Screen

b. Enter the requested values as displayed in the example above.

c. Click the **Save** button (🖳)

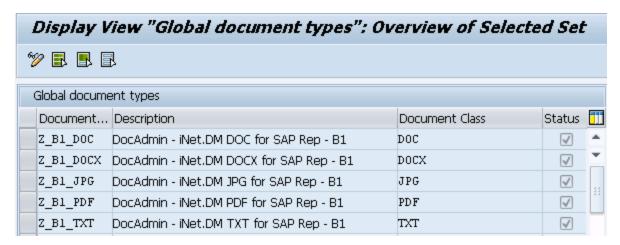


Figure 5-8 Global Document Types Overview

5.4 Creating Links for Content Repositories (SAP T-Code OAC3)

- 1. In the ribbon (Figure 5-1), type /noac3.
- 2. Select the Change/Display button.
- 3. Click the **New Entries** button.

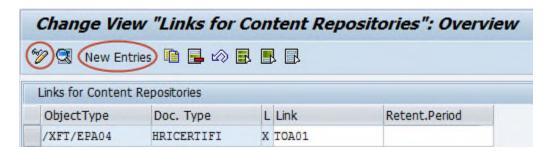


Figure 5-9 Links for Content Repository Details

4. On the **New Entries: Details** screen, enter the requested values as displayed in the example below:

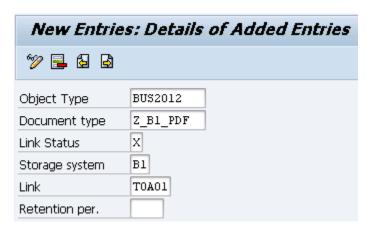


Figure 5-10 New Entries Screen

- **Object type**: the SAP Object Type name
- **Document type**: the SAP Document Type you recently created
- Link status: "X", the link is active
- Storage system: the name of the SAP Content Repository you recently created
- **Link**: SAP link table. This can be any link table.
- Retention Per.: can leave blank
- 5. Click the **Save** button ().

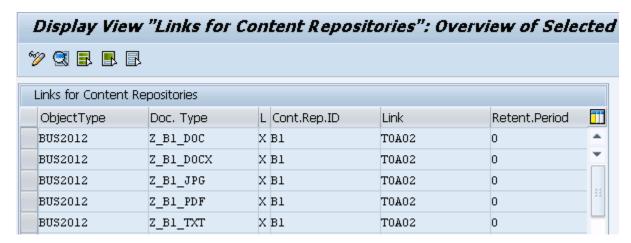


Figure 5-11 Display View of Links

6 Basic Validation of iNet.DM Functionality

6.1 SAP T-Code OAAD (ArchiveLink: Administration of Stored Documents)

- 1. In the ribbon (*Figure 5-1*), type /nOAAD.
- 2. On the ArchiveLink: Administration of Stored Documents screen, click Store and Assign.

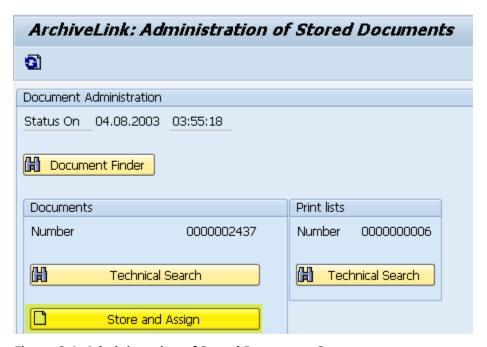


Figure 6-1 Administration of Stored Documents Screen

3. On the **Store and Assign** page, select the SAP Business Object Type (in this example, *BUS2012*.)

4. Click **Create** in the upper left had corner and look up the desired purchase order # for the document attachment operation in the next step.



Figure 6-2 Store and Assign Screen

- 5. Click the **Accept** button (
- 6. From the Storing files in document dialog box, locate the PDF, then click **Open**.

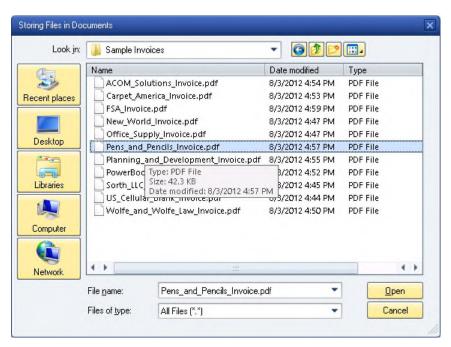
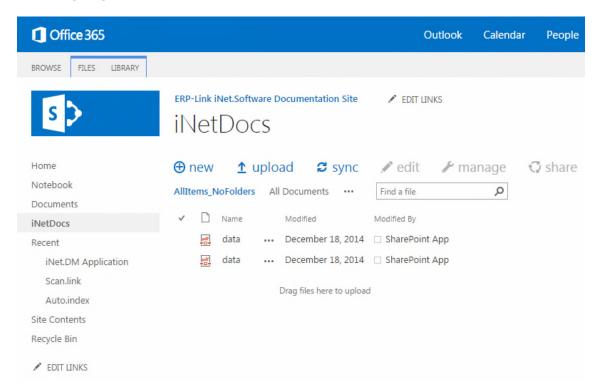


Figure 6-3 Storing Files in Documents Dialog Box

7. In SharePoint, navigate to Document Library where all of the iNetDM documents from SAP are going to be stored.



The example above shows two files assigned.

6.2 iNet.DM Service Validation through Web Browser

To validate the iNet.DM service through a Web browser, type the following the URL address field:

http://{ServerName}/iNetDM/CommandAcceptor.aspx?serverInfo&pVersion=0045&contRep={ContentRepositoryId}

The **ContentRepositoryId** field in the URL represents the SAP Content Repository ID that is under validation.

With a successful test, the following sample text will be returned:



7 SharePoint Configuration File Entries

7.1 Web.Config Entries

You can declaratively register web.config entries by creating an XML file that contains a set of web.config modifications. To do this, you create a custom *webconfig.XYZ.xml* file deployed to **C:\inetpub\wwwroot\wss\VirtualDirectories\80\iNetDM** (example), where *XYZ* is a unique ID that you use to identify your solution.

Note: other web.config entries exist when the ERP-Link DSM (Document Service Modules) products are deployed alongside ERP-Link iNet.DM

Path: [IIS Site installed to]\iNetDM\Web.config

ID	Key Name	Description	Example
1	ContentRepository XMLFileName	This key stores the file path of the default iNet.DM configuration file	C:\inetpub\wwwroot\erplink.e xample.com\iNetDM\FILES\ContentRepositoryConfig.xml
2	ERPLink.iNetDM.Barc ode.iNet_SendBarco de	The ERP-Link Connection Service connection string for the SAP system that the barcode function should be using	"SERVER=127.0.0.1;POOLID=0 0"

7.2 ContentRepositoryConfig.xml Entries

Path: [IIS Site installed to]\iNetDM\FILES\ContentRepositoryConfig.xml

ID	XML Node	Description	Example
1	ContentRepID	This attribute corresponds to the SAP Content Repository ID	B1
2	WorkSpaceURL	This attribute specifies the SharePoint site as it is listed in SharePoint Central Administration	http://erp460/
3	RepositoryURL	This attribute specifies the primary SharePoint Document Library name	DocumentLibrary
4	SecurityEnable	This attribute is used to specify the security status at SAP side.	"False"
		If Security is enabled at SAP side then the value of this attribute will be "True" otherwise "False".	
5	SupportedProduct Versions	This attribute is used to specify HTTP Content Server interface version supported by iNet.DM	"0045"
6	DefaultDocument Protection	This attribute is used to specify the Default document protection	"rcud"
7	Description	Specifies the Content Repository description. This value will be used as a response for the ServerInfo SAP request.	Sales Orders Document Repository
8	Repository Dynamic Doc Libraries Enabled	Enable (True) or Disable (False) dynamic document routing. This will store documents to a predefined set of libraries managed by iNet.DM.	"True" or "False"

ID	XML Node	Description	Example
9	Repository Dynamic Doc Libraries Count	Specify the number of document libraries to be used by the dynamic routing algorithm.	"200"
10	Repository Dynamic Doc Libraries Prefix	Prefix to use on all dynamic document libraries created by the algorithm.	"DocLib_"
11	RepositoryDynamic DocLibrariesItemPrefi x	Any padding character to ensure all items are the same length as the largest number (i.e. count of libs). For example if there are 100 dynamic doc libs, then a prefix of "0" will make the libraries as follows: DocLib_001, DocLib002 DocLib100 instead of DocLib_0 DocLib_12 DocLib_100	"0"
12	RepositorySubFolders Enabled	Enable (True) or Disable (False) subfolder routing	"True" or "False"
13	RepositorySubFolder Count	Specify the number of subfolders to be used by the hashed document distribution algorithm	"200"
14	RepositorySubFolder Prefix	Prefix to use on all subfolders	"Folder_"
15	RepositorySubFolder ItemPrefix	Padding character (i.e. "X" = will produce "XX1", "XX2", etc.)	"0"

ın	VMI Nada	Description	Evample
16	Logging	Defines the level of information sent to the Event Log. Each level provides more information that the previous. • Error – provides the least amount of messages • Warning – provides more	"Error"
		 messages than Error Information – provides the most diagnostic information 	
17	CheckSecurityKey	"True" or "False" – set to "True" if using SAP security certificates to prevent unauthorized access	"False"
18	PreserveFileName	"True" or "False" – set to "True" to handle filenames with international characters without performing encoding.	"False"
19	ParallelQueryEnabled	Enables locating a document using simultaneous, search-based queries against all primary and secondary document libraries. The various libraries must have the key search columns as indexed columns to ensure good performance.	"False"
20	SendDeletionsTo RecycleBin	If "True" all documents deleted by SAP will be sent to the Recycle Bin instead of being irrevocably deleted.	False

ID	XML Node	Description	Example
21	AdditionalProperties	 Add "AdditionalProperty" elements for each additional property to be added to archived documents. "Name" = the display name for the property to be added. "Value" = the value for the property to be added. 	
22	Secondary Document Libraries	Add "Secondary DocumentLibrary" elements for each document library that iNet.DM should search for a document ID. • WorkspaceURL = "" – Should be the SharePoint site to look in (currently ignored) • Repository = "" – Should be the document library relative name to look in.	
23	DatabaseSettings	Controls use of the Tracking Database • trackingEnabled="true" – use the tracking database for archival and retrieval attempts • connectionstring – SQLServer connection string for the tracking database	

ID	XML Node	Description	Example
24	SharePointSettings	Controls communication to SharePoint:	
		Connection Name – "SSOM" for Server-side APIs to communicate with SharePoint, or "CSOM" for Client-side APIs	
		SSOM node:	
		Version – contains "2010" or "2013" options, depending on which version of SharePoint will be used in SSOM mode.	

8 FAQs

8.1 How do I determine the installed version of iNet.DM?

- 1. Launch IIS Admin on the iNet.DM server and browser to the iNet.DM virtual directory.
- 2. Right-click the **bin** folder and choose **Explore**.

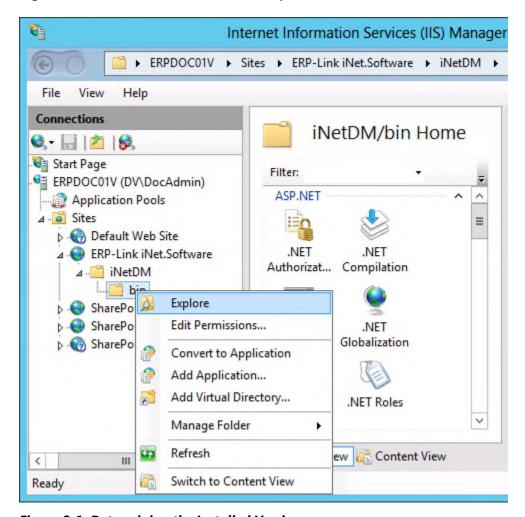


Figure 8-1 Determining the Installed Version

3. Right-click the *ERPLink.dll* or *ERPLink.iNetDM.dll* file, and select **Properties** from the context menu.

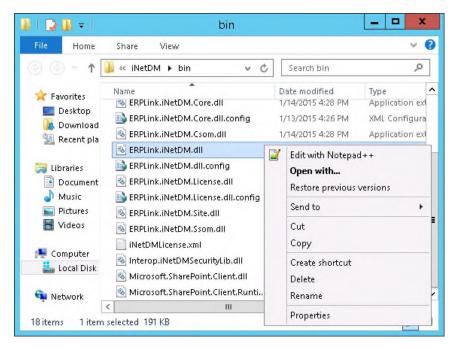


Figure 8-2 Determining the Installed Version

4. Click the **Details** tab to view the version property.

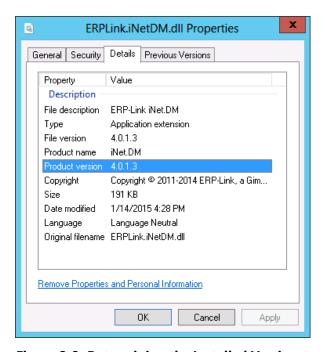


Figure 8-3 Determining the Installed Version

8.2 How do I determine the expiration date of iNet.DM?

Note: Look at the certificate in the bin/location. See the iNetDMLicense.xml file.[GV4]

For example, C:\inetpub\wwwroot\wss\VirtualDirectories\ERPLink_WebServices\iNetDM\bin\iNetDMLicense.xml.

8.3 How do I configure an SAP Content Repository for HTTPS?

These instruction describe how to configure an SAP HTTP content repository to use the HTTPS protocol to communicate to an HTTP content server, such as iNet.DM.

- 1. Navigate to SAP T-Code /nOACO.
- 2. Select the content repository and click the **Display/Change** button.

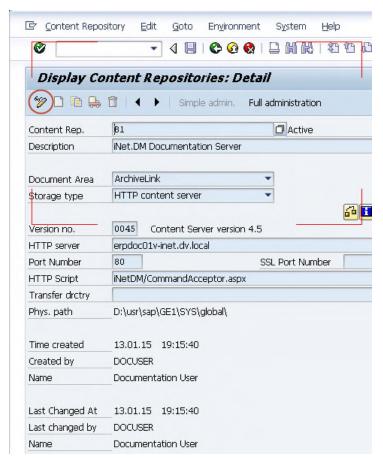


Figure 8-4 Display Content Repository

3. Activate HTTPS options by entering **%HTTPS** in the transaction field.

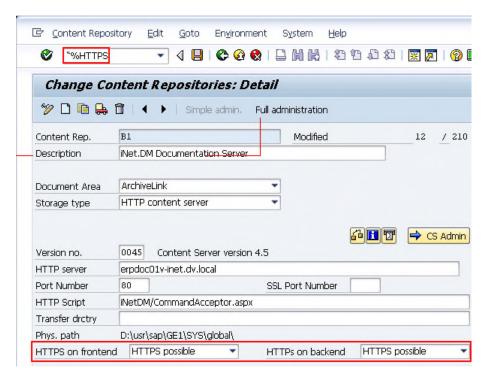


Figure 8-5 Changing Repository Detail

4. Clear the HTTP port value and enter the appropriate SSL Port Number value.



Figure 8-6 Clear Port Number and Enter SSL Port Number

5. Switch backed and frontend HTTPS modes to "HTTPS required."

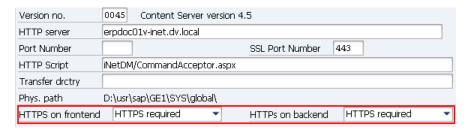


Figure 8-7 HTTPS modes switched to HTTPS required

6. Save the settings.

8.4 How do I configure unauthorized access safeguards for iNet.DM?

The following steps describe how to make use of iNet.DM's SAP security integration in conjunction with an SAPSECU encryption certificate.

- 1. Create the certificate folder called "c:\SAPCert".
- 2. Right-click the **SAPCert** folder, then choose **Properties** from the list.

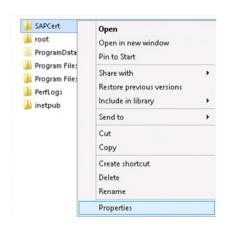


Figure 8-8 Select Folder Properties

3. Click the **Security** tab and set permissions on this folder.

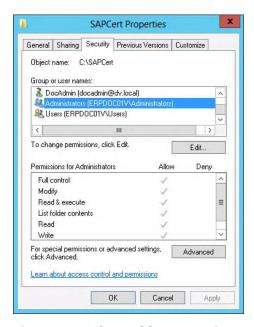


Figure 8-9 Select Folder Properties

- 4. Click **OK**.
- 5. From the ERP-Link Administration Console, open the ContentRepositoryConfig.xml file.
- 6. Select the SAP node and edit the path and filename for the security certificate **Misc** pane.

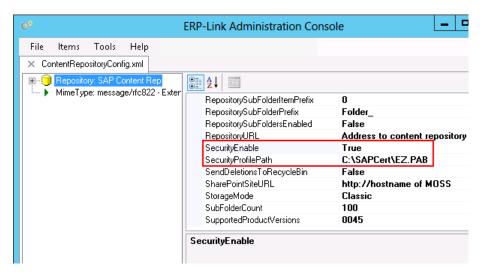


Figure 8-10 Enter Security Profile Path

7. Additionally, set **CheckSecurityKey** to *True* and **DefaultDocumentProtection** to *rcud*.

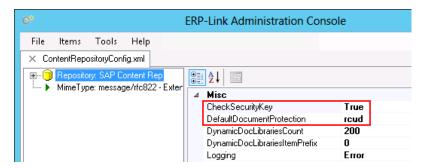


Figure 8-11 Enter Security Profile Path

- 8. Navigate to SAP T-Code /nOACO.
- 9. Select the content repository and click the **Display/Change** button.

10. Click the **Send the certificate** button.

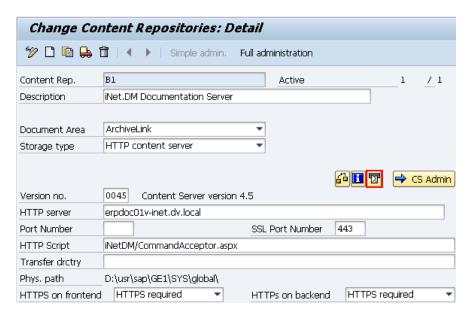


Figure 8-12 Sending the certificate

11. Test the archival and retrieval.

8.5 How do I configure static metadata for each document archival?

You can add configured **static properties** to documents archived via SAP or Gimmal's Scan.link DSM into an iNet.DM repository. These values are pre-set in the *ContentRepositoryConfig.xml* file and are specific to all documents archived to the content repository for which they are defined.

- 1. Launch the ERP-Link Administrator Console.
- 2. Open the ContentRepositoryConfig.xml file.

3. Right-click the repository node, then choose **Add Additional Property** from the list.

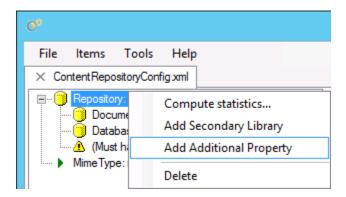


Figure 8-13 Add Additional Property

4. On the **Misc** pane, enter values for the **Name** and **Value** fields.

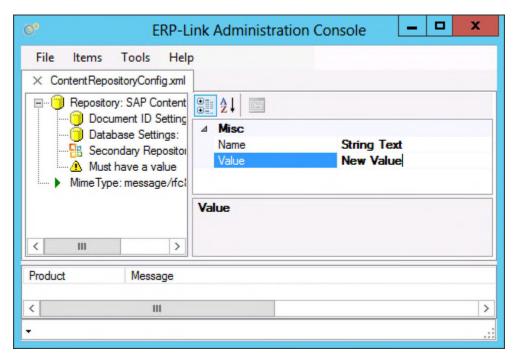


Figure 8-14 Misc Pane

5. Repeat steps 3 and 4 for additional properties as shown in the following example.

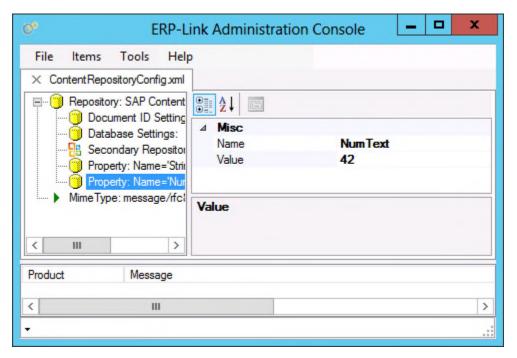


Figure 8-15 Additional Property

- 6. Save the file.
- 7. Restart the iNet.DM Application in one of the following ways:
 - make an immaterial change to the iNet.DM web.config file
 For example, open the web.config file, add and delete a space, and then save the file.
 - restart the iNet.DM application pool or website
 - perform an IISReset.