



Daisy Communications Limited

SharePoint and Wisdom White Paper

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1 Preface

1.1 Document Information

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1.2 Document History

Date	Version	Author	Description of change
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2 SharePoint and Wisdom White Paper

2.1 Purpose

The purpose of the SharePoint and Wisdom White Paper is to discuss the SharePoint role of SharePoint and Wisdom and identify how the systems can be used together as part of a cohesive EDRMs strategy.

2.2 Scope

The scope of this document is limited to the SharePoint 2013 integration features provided by Wisdom, how they work and why to enable you to make an informed decision about how best you use them.

2.3 Responsibility

This document is the responsibility of the Daisy Wisdom department.

3 SharePoint

3.1 What is SharePoint?

Microsoft SharePoint is a web application framework that provides document and file management, collaboration, social network, website, enterprise search and business intelligence functionality. It is available as an on premise (SharePoint 2013) or cloud hosted (SharePoint Online) installation. The Wisdom Integration is currently only supported for on premise environments, as it is deployed as a farm solution.

3.2 Why do we need SharePoint?

SharePoint is often deployed in organisations as a central platform used across multiple departments and teams for collaborating and sharing. It provide a standard interface familiar to office users and strong integration with existing office products.

3.3 What are the benefits of using SharePoint in conjunction with Wisdom?

Whilst SharePoint does provide some records management functionality it has limited capabilities. The Wisdom SharePoint integration enables organisations to deploy best of breed tools for a given requirement – SharePoint can support the initial creation and collaboration of documents, with Wisdom providing the organisational EDRM solution.

The recommended work flow sees users creating draft documents in existing SharePoint sites that have been extended to include a Wisdom enabled document library. All of the out of the box SharePoint functionality can be used to create and refine the document. At the point that the document is finalised it can be declared as a record from within SharePoint. The document and any mapped metadata is passed Wisdom and Wisdom security is used to enforce restrictions in SharePoint, preventing edits and unauthorised access to the document.

3.4 Why not just use “Registered Documents” in Wisdom?

Wisdom enable users to register documents that are not yet ready to be declared as records and provides similar functionality to SharePoint, enabling users to check documents in and out, apply metadata, and manage versions.

Using this functionality requires that users have access to the Wisdom front end, understand the appropriate file plan location to create new documents, and have a more detailed understanding of Wisdom. In many organisations users are already familiar with SharePoint and have existing SharePoint sites in place.

Using the Wisdom SharePoint Integration enables users to adhere to the organisation's record management policy and procedures without needing specific training or access to Wisdom.

Additionally users can take advantage of other SharePoint features during the creation of the document such as co-authoring, workflow, OneDrive, etc.

3.5 Are there any limitations?

3.5.1 One way (SharePoint > Wisdom) metadata synchronisation only

Once a SharePoint document is declared as a record in Wisdom, users are prevented from changing the content of the record, but any metadata changes in SharePoint are passed to Wisdom. Any metadata changes in Wisdom are not currently reflected in SharePoint.

3.5.2 Support for "Register document" and "Indexing complete" no longer supported

The SharePoint 2010 integration supported registering documents as well as marking documents as indexing complete. This functionality is no longer available in the SharePoint 2013 integration. The recommended approach is now to create and manage documents in SharePoint, and then declare them as records once complete.

3.5.3 No automated upgrade from previous versions

There is no automated upgrade path for customers who have deployed the Wisdom SharePoint Integration V3.0 on SharePoint 2010. This is because the SharePoint 2010 integration relied on using the Remote Blob Storage APIs to expose the Wisdom document store to SharePoint such that documents persisted to the SharePoint content database were saved directly to the Wisdom document store. The same APIs are available in SharePoint 2013, however SharePoint now stores document shreds rather than the whole document so it is no longer possible for Wisdom to treat the blobs received from SharePoint as documents.

3.6 Implementation

The Wisdom SharePoint Integration module is required which can be licensed from Daisy. There is a separate document detailing the installation sequence but broadly the steps are:

- Copy the deployables to the SharePoint Central Administration Server.
- Run Install-WisdomSharePointIntegration.ps1 to deploy the Wisdom SharePoint Integration solution and activate the features for the Content Database that you specify during the installation.
- If you wish to use the Wisdom Record Centre run Configure-RecordCentre.ps1

3.7 Infrastructure

There are no specific infrastructure requirements for the Wisdom SharePoint Integration assuming that you have existing SharePoint and Wisdom environments.

It is necessary for the SharePoint Integration Components to communicate with the Wisdom Servers as follows:

- Access the Wisdom Configuration Service which resides on the Wisdom Servers on Port 8732
- Read and write files to the Wisdom Temporary Folders which must be hosted on a UNC Share
- Access the Wisdom SQL Server Databases