

Getting Started Tips

Kodak offers a portfolio of software products that make it easy to migrate your paper to SharePoint. How do they differ from one another in how they work with Microsoft SharePoint?

KODAK Capture Pro Software is a full featured document and batch capture application which is perfect for departmental to full production scanning environments. Easy to use and versatile, it supports all Kodak scanners and many popular non-Kodak scanners as well. Capture Pro can output to dozens of ECM and document management systems and features advanced SharePoint output options, including full index mapping to make it easy to associate index fields in Capture Pro with applicable metadata columns in **Microsoft SharePoint**. A SharePoint Setup Wizard makes it easy to import SharePoint index configuration information directly into Capture Pro software, making index mapping a snap. Capture Pro offers fully customizable output, automated document and batch separation, automated indexing and is ideal for both standalone and multi-user deployments.

KODAK Scan and View Software is an all-in-one scanning, viewing and editing solution built into the Microsoft SharePoint interface that makes collaboration simple and allows customers to add paper documents to SharePoint libraries through the user's browser. Perfect for ad hoc scanning without the need to exit SharePoint and launch a scanning application. Because it runs as a service application in SharePoint, Scan and View has access to all of the metadata columns in SharePoint for manual indexing.

Kodak's Smart Touch feature is an easy to use document capture utility that is shipped with select Kodak scanners and is installed automatically when you install your scanner drivers. Perfect for ad hoc scanner users without complex scanning or workflow requirements, Smart Touch makes it easy to scan a document and automatically output it to a SharePoint repository with a single push of a button. Some simple configuration is required to set up the shortcut to the correct SharePoint destination.

KODAK Capture Desktop Software provides essential functionality to capture single batches of documents and convert them into usable information. It comes bundled with select Kodak scanners and is a good choice for one or more Kodak scanner users performing entry level batch scanning or editing. Kodak Capture Desktop Software allows a more advanced level of SharePoint output options than Smart Touch, including the ability to create simple index mapping. Some configuration is required to set up the SharePoint destination and index mapping.

How do I get started scanning to Microsoft SharePoint?

For **Kodak** Capture Pro Software users:

- Click on the **SharePoint Index Setup Wizard** button at the bottom of the Job Setup Screen
- Click on an existing SharePoint connection or create a new one
- From the dropdown menu, select the SharePoint library or list where you wish Capture Pro to output files
- The Wizard will create the index fields from the SharePoint column information; edit settings as desired right from within the Wizard
- Set up index field mapping (by default, the Wizard will map every index field to the corresponding SharePoint column; no action is required unless you want to modify that mapping)

- Complete the setup by selecting the output file type (eg, PDF, TIFF, JPEG); specifying the starting folder in the SharePoint library; and selecting version level (major/minor);
- Review the summary screen and exit the Wizard

For **Kodak** Scan and View Software users:

- From within a SharePoint 2010 library, click in the white space to the left of any document icon; this will bring up a SharePoint ribbon at the top of the screen. Then click the Scan Document icon at the far left of the SharePoint ribbon
- From within a SharePoint 2007 library, select **Scan Document** from the **New** pull-down menu.

The following steps are the same for both versions of SharePoint:

- Follow the prompts to select scanner and output file type; click Scan
- Select a settings configuration and click Scan
- Name the file and click Save
- The scanned document image file will appear in the library you were working in when you selected Scan Document

For **Kodak** Smart Touch users:

- On the configuration menu, select the **New** icon to see the menu for new *Scan To* destinations
- Select SharePoint to bring up a dialog box
- Set up your login information
- Enter the URL of the SharePoint site
- Select a folder, if desired
- More information is available in the Smart Touch User's Guide, which is available for download at:
 - http://graphics.kodak.com/docimaging/US/en/Support_Center/Document_Scanners/Departmental/i1320_Scanner/Support/User_Manuals/Smart_Touch_Guide/index.htm

For **Kodak** Capture Desktop Software users:

- From the software's main menu, select **File/Job Setup/Output**
- Select **System 1**
- Click the **Send To** box, then select **Microsoft Office SharePoint Server 2007** from the pull down menu (Note: Capture Desktop Software does not currently support SharePoint 2010)
- Click **Setup**, then enter the URL of the SharePoint site under **Host Name**
- Enter **Site Name**, **Library Name** and **Folder Name** as desired
- Enter your login information
- Open the **Index tab** to create folders in SharePoint libraries and assign index field values in Capture Desktop to SharePoint library columns.
 - To create a folder in a library, select Setup to launch the formula editor and create formulas by selecting Capture Desktop index field names from the list
 - Enter formulas for all the SharePoint columns that require mapping by clicking the ellipses (...) button to bring up the formula editor
- Open the **Image tab** to select the type of files (eg, TIFF, PDF, JPEG) to output to SharePoint and whether you want to Check in the scanned documents after they are uploaded to SharePoint.
- If you wish, you can save the settings as a new Job Setup
- Scan your document or batch; when you select **Output Batch**, the images will automatically be output to the designated SharePoint destination(s)
- For more detail, go to the Help file in Capture Desktop and search on *SharePoint*