



Solutions for information workers



Document Preview for SharePoint Server 2010

SharePoint 2010



Administrator and User Guide

Version 1.9.0

Websio Information Solutions Ltd

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It is essential that you thoroughly read this Guide in order to ensure the proper product installation and usage.

Overview

Document Preview:

- Provides graphical preview of the document
- Integrates in the standard Document libraries, SharePoint and FAST Search centers
- Supports multiple document formats
- Packaged as native SharePoint solution
- Creates thumbnails in the separated background process
- High security level – only users with at least read permission to the original document can see the preview.
- Doesn't require the user to install a document viewer (Microsoft Office, PDF Viewer, etc.) on the server

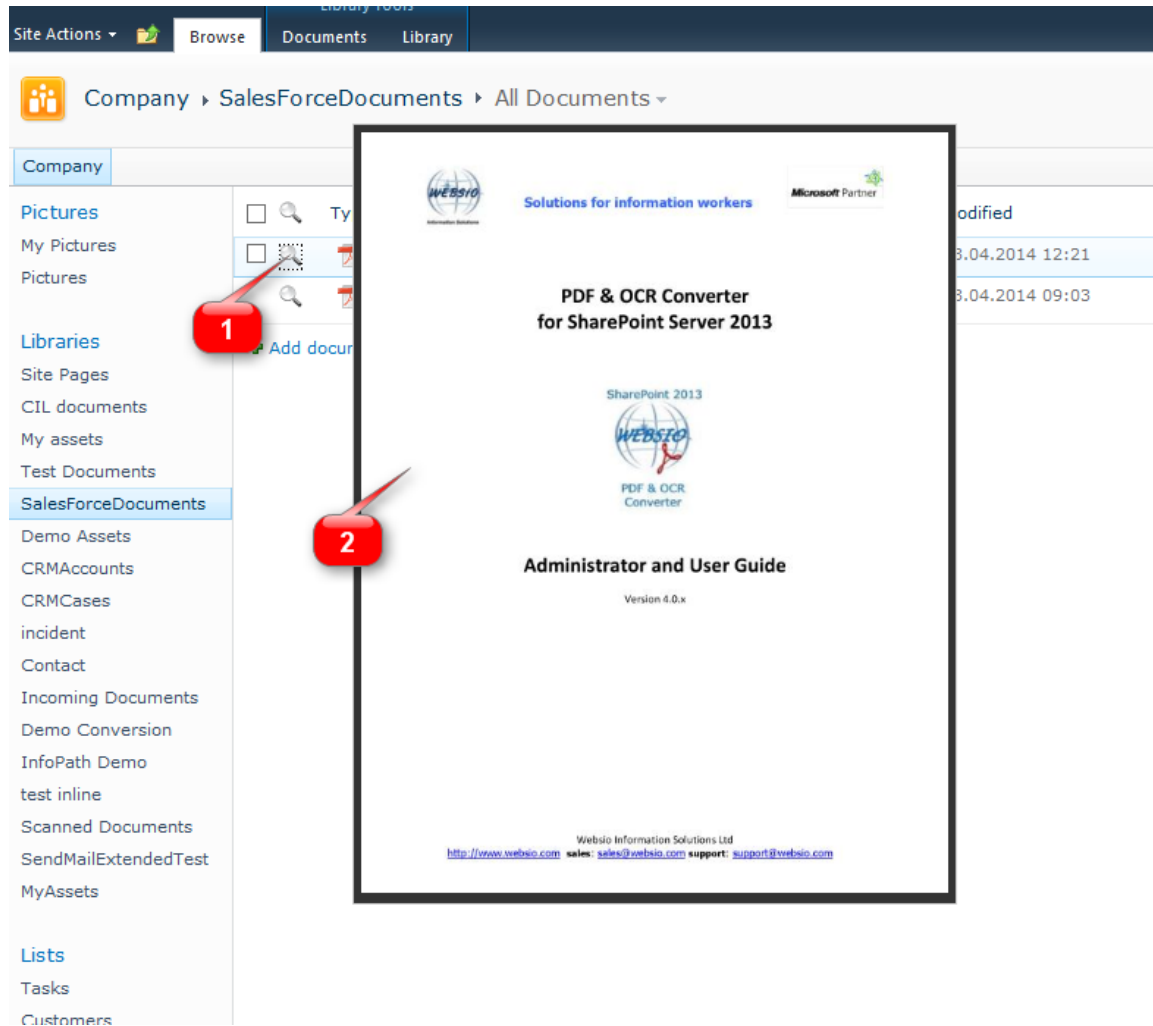
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Preview modes

Quick preview

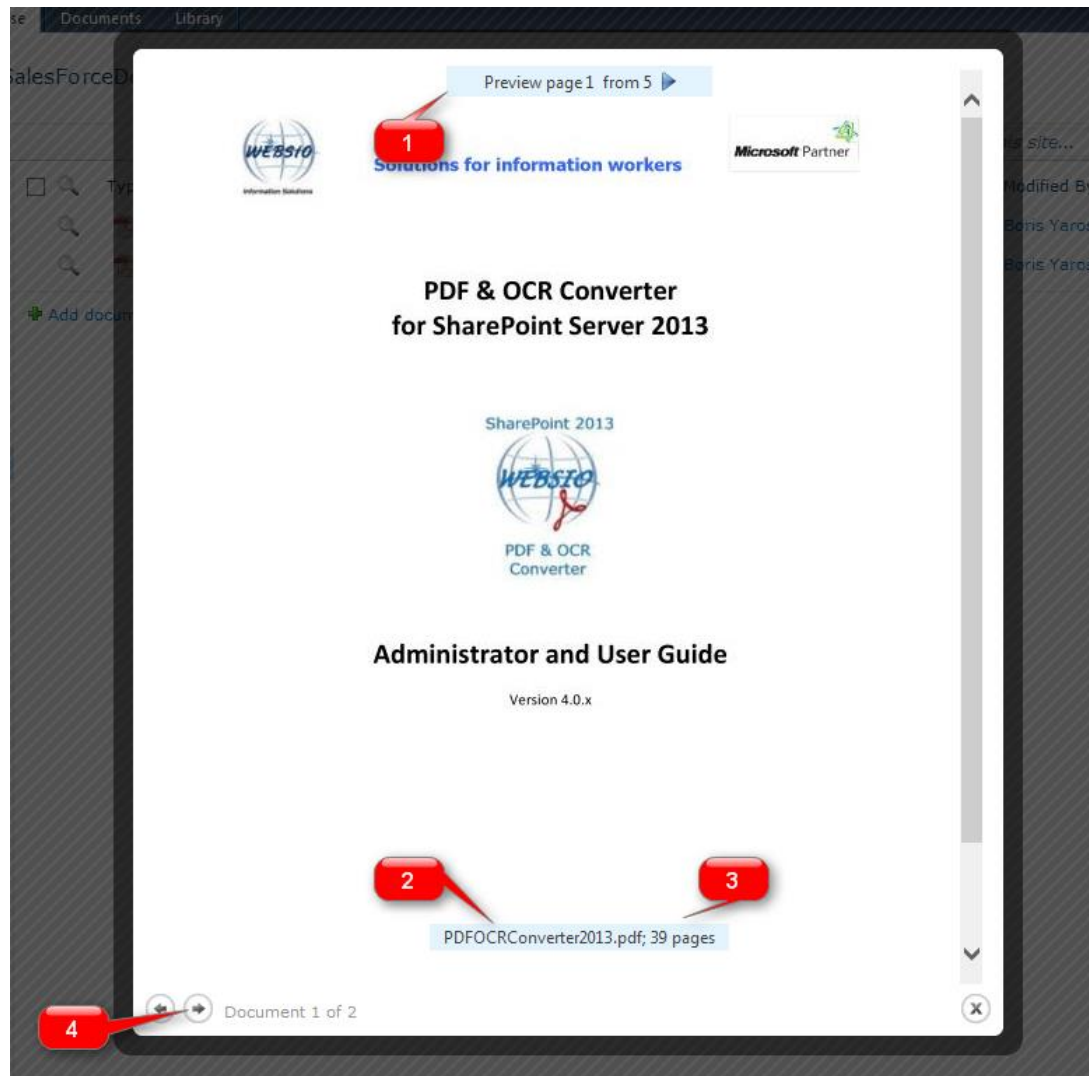
Quick preview has reduced quality and displays first page only



1. Move mouse over preview icon to open Quick Preview
2. Quick Preview pane


Full Preview

Click on the preview icon to open full preview window.



























1. Navigation between preview pages
2. Document name
3. Total document pages count
4. Navigation between documents

Please pay attention:

Preview displayed on *mouse over* has reduced quality. This preview mode is intended for document recognition by content structure. *Click* on the icon  to see preview in the normal quality.

Optional: Connectable Preview Web Part with inner zoom (magnifier):

Shared Documents

Select	Type	Name	Modified	Modified By
		invoice 378 	3/10/2012 1:28 AM	Ben Thompson
		places 	3/10/2012 1:28 AM	Ben Thompson
		Presentation1 	3/10/2012 1:28 AM	Ben Thompson
		Quote EV0370 	3/10/2012 1:28 AM	Ben Thompson
		Quote EV0371 	3/10/2012 1:28 AM	Ben Thompson
		Quote EV093 	3/10/2012 1:28 AM	Ben Thompson
		RE Scanner and PDF Plug-in for SharePoint and Dynamics CRM 2011 	3/10/2012 1:28 AM	Ben Thompson
		SharePoint News Slider Registration 	3/10/2012 1:28 AM	Ben Thompson

 Add document

Websio Preview Web Part

Quote EV093.docx

Quote #EV0393

Date: November 15, 2010
Valid until: November 25, 2010
Customer: IOZ

Option 1:

#	Name
1	Advanced Support Program for SharePoint Cross View 2010 for one y

Payment Type: Credit card

Link to Order Form:

Software Requirements

SharePoint Server 2010 Standard or Enterprise “on-premises” *

* **On-premises software** is installed on computers on the premises (in the building) of the organization using the software, rather than at a cloud somewhere on the internet.

Prerequisites

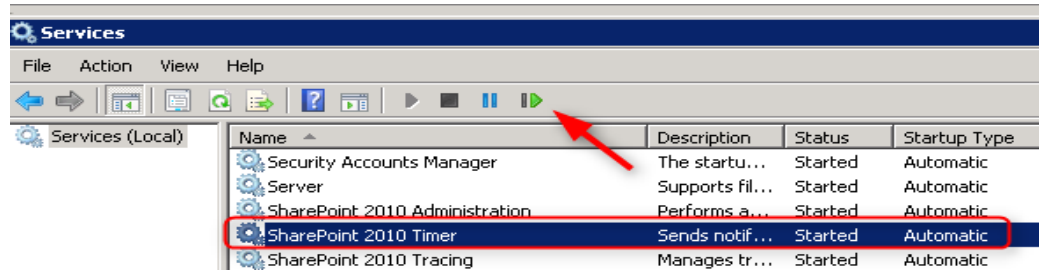
1. Word Automation Services started and configured.
See Appendix B for instructions how to configure Word Automation Services.
2. SharePoint Server Search configured (for Search Results Preview only).

How it works

1. Document Preview event receiver adds each new or modified document to the “thumbnail queue”.
2. Document Preview Timer Job is responsible for “thumbnailing” process. It reads links to documents from the “thumbnail queue” and creates preview for each supported document.
3. By default, Document Preview Timer Job is scheduled to run each 5 minutes.
Please do not change default job schedule if it is not necessary. Default settings are optimized for the best performance for sites containing up to millions documents.
4. Please read [Appendix A – “Technical Overview”](#) for more details.

Installation

1. **Important!** You must be logged on to the server by using an account that is a member of the Server Administrators group and SharePoint Farm Administrators
2. Install prerequisite PDF to Image Converter
 - Download PDF to Image Converter from one of the links below:
<http://www.frontalix.com/public/frontalixpdfconverter35.zip>
or
http://www.websio.com/public_files/frontalixpdfconverter35.zip
 - Unzip frontalixpdfconverter35 on your server
 - **Important!** Right-click the "setup.exe" and choose "Run as Administrator" to begin the installation.
3. Unzip docpreview2010.zip file on your SharePoint 2010 front-end server.
4. **Right-click** on the setup.exe and select "Run as Administrator" in order to begin the installation wizard.
5. **Highly recommended!** Restart IIS and SharePoint 2010 Timer service after installation.
 - Restart IIS. Open command prompt as Administrator and run `iisreset /noforce`
 - Restart SharePoint 2010 Timer service. Open Windows Services, select SharePoint SharePoint 2010 Timer and click on the "Restart"

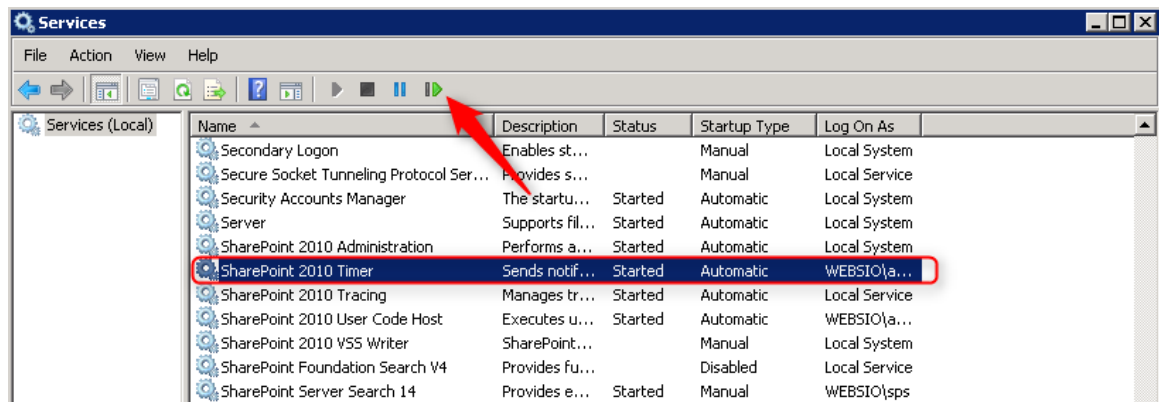


- Standard SharePoint deployment is not enough, repeat steps 2-5 on each your SharePoint WFE (front-end) server to successfully install the Preview.

Version Upgrade

Steps order is very important!

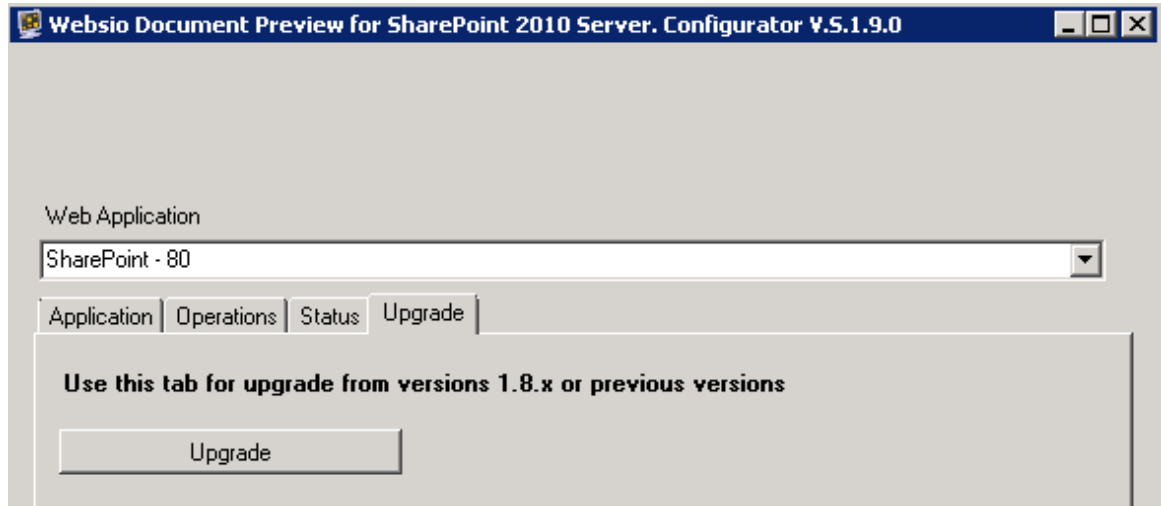
1. Download latest version from our site
2. Logon to your SharePoint server as a member of the Server Administrators group and SharePoint Farm Administrators
3. Open Control Panel
4. Uninstall Document Preview
5. Restart IIS using command “iisreset /noforce”
6. Restart SharePoint Timer Service



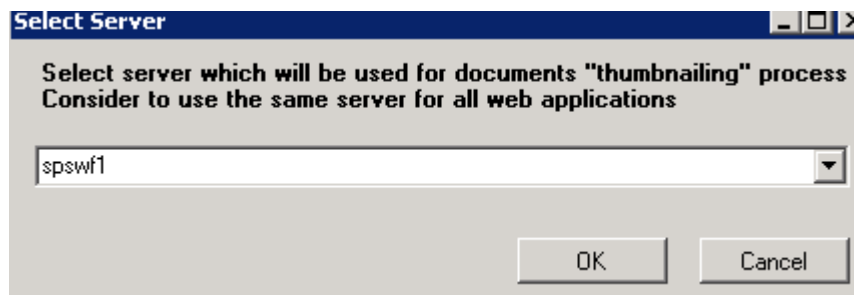
7. Repeat steps 2-6 on each your SharePoint Server
8. Install new version as described in the section “[Installation](#)” above
9. Run Document Preview Configurator. The Configurator tests required parameters on the program start. If the Configurator does not show errors, close it. You do not have to use any Configuration option in this step! Neither “Add Preview”, nor “Remove Preview”!

10. For upgrade from version 1.8.85 or below only:

- Open tab “Upgrade” of the Configurator and click on the button “Upgrade”



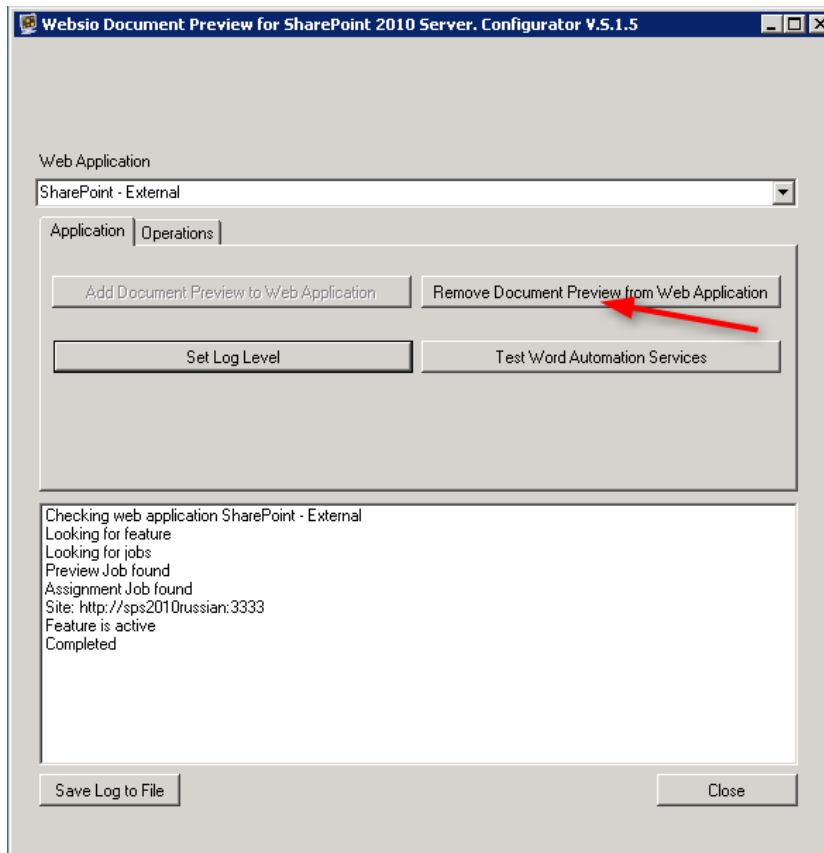
- If your SharePoint Farm contains two or more servers, you will be asked which server to use for documents conversion (“thumbnailing”) process. Please consider to use the same server for all web applications.



- Repeat this step for each Preview-enabled web application
11. The upgrade has been completed; existing preview thumbnails will stay untouched during upgrade process.

Uninstall Document Preview

1. Launch Document Preview 2010 Configurator.
2. Select Web Application
3. Press button "Remove Document Preview 2010 from Web Application"



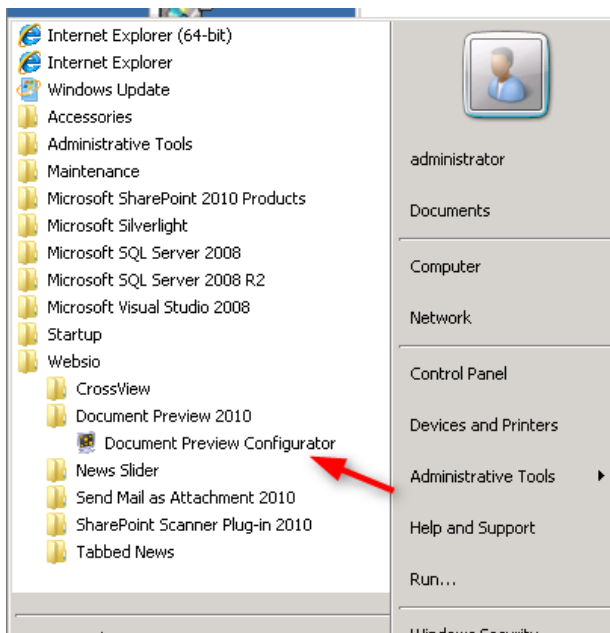
4. Repeat steps 2-3 for all Web Applications.
5. Uninstall Document Preview 2010 using from Control Panel -> Uninstall

Configuration

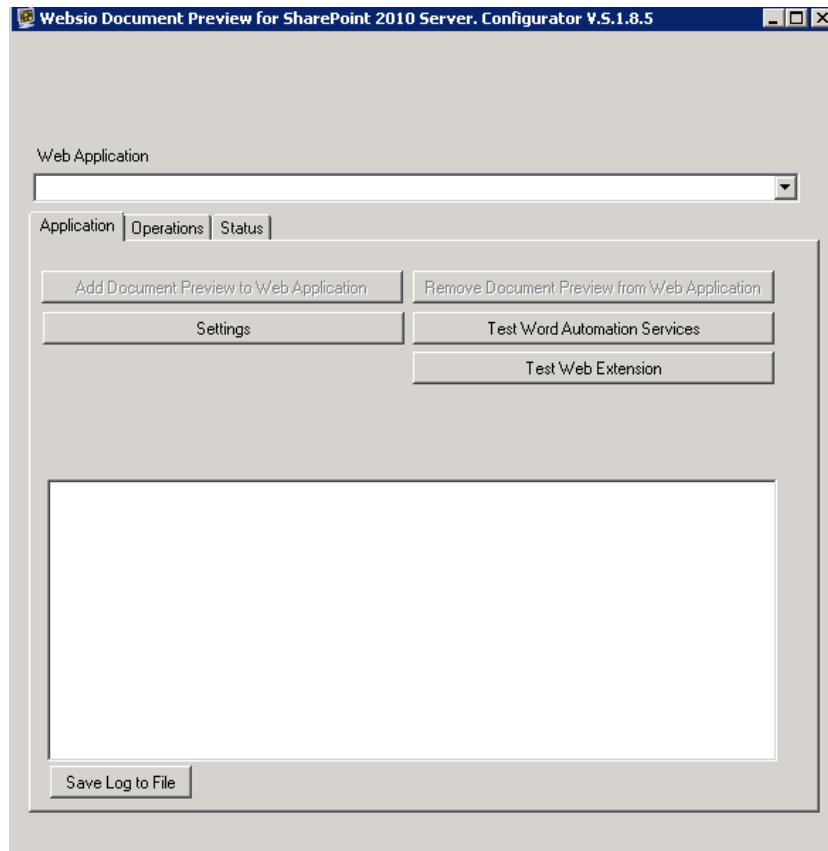
Initial Configuration

If you are interested to preview web pages and InfoPath web enabled forms, install Web Extension for Document Preview first. See section “Web Extension Configuration” for installation instructions.

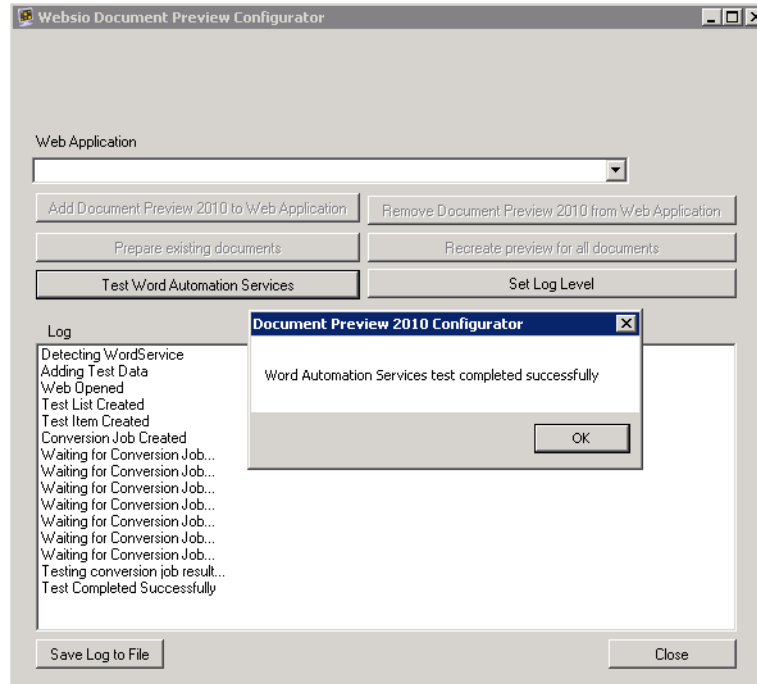
Launch Document Preview 2010 Configurator from the Start Menu on your SharePoint server. **Important!** You must launch Document Preview 2010 Configurator once on each SharePoint Server to allow it to check server configuration (launch only!). All configuration operations provided by Document Preview 2010 Configurator you must perform on one server only. We recommend using the same server, which will be used for “thumnailling” processing (see paragraph 7 below).



- Document Preview 2010 Configurator tests configuration on the first run.
- When all configuration tests are passed successfully, the next screen will be shown:

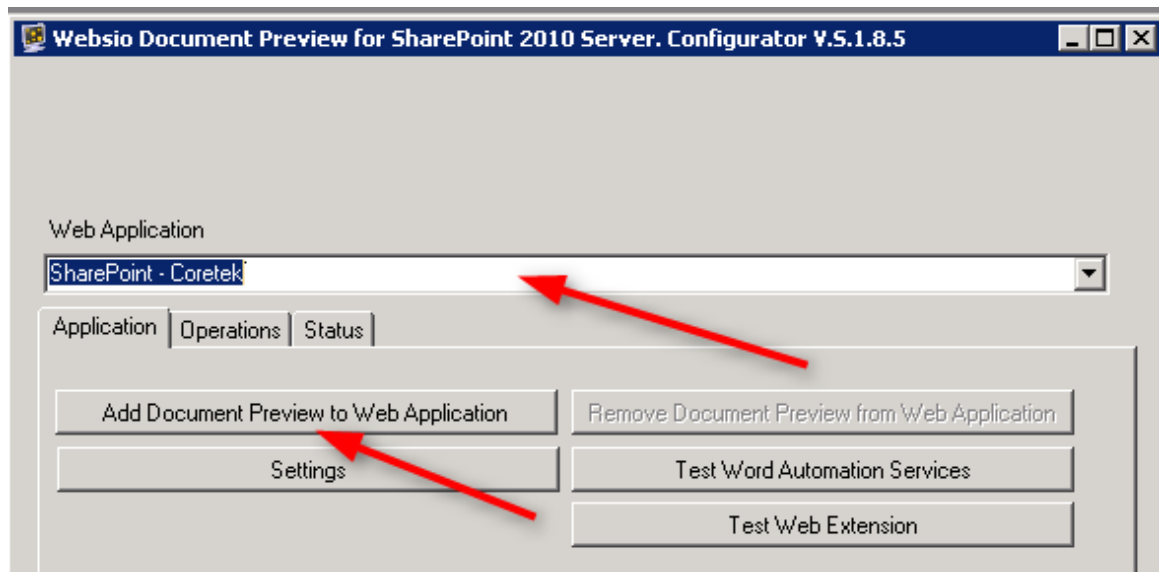


- On the first run:
 1. Select one of your Web Applications
 2. Click on the "Test Word Automation Services" button
 3. The Configurator tests SharePoint Word Automation Services. You will see the next message when the test will be passed successfully:



Otherwise configure SharePoint Word Automation Service as shown in the "[Appendix B](#)" of this document and/or SharePoint 2010 documentation and run this test again.

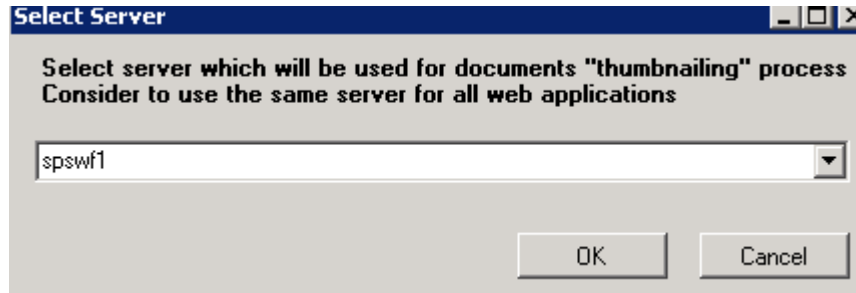
- Select Web Application from the drop down list and press "Add Document Preview 2010 to Web Application".



- The Configurator will execute the following steps:
 - .1. Activate Document Preview features on all site collections in the selected Web Application.
 - .2. Add custom field "Websio Preview Field" to the site columns collection and to the base content type "Document".

Important! Do not add this field to your content types / lists manually.
 - .3. Add new SharePoint Timer jobs to the Web Application level:
 - .3.1. Document Preview Timer Job
 - .3.2. Document Preview Field Library Assignment job
 - .4. Add Websio Preview Field to all existing document libraries views.
- After initial configuration, all new and/or modified documents will be included in the "thumbnailing" process.

- If your SharePoint Farm contains two or more servers, you will be asked which server to use for documents conversion (“thumbnailing”) process. Please consider to use the same server for all web applications.



- **Important!** Run full content source crawl after the first use of the Configurator to see preview in the SharePoint Search results.

Preview Extensions installation

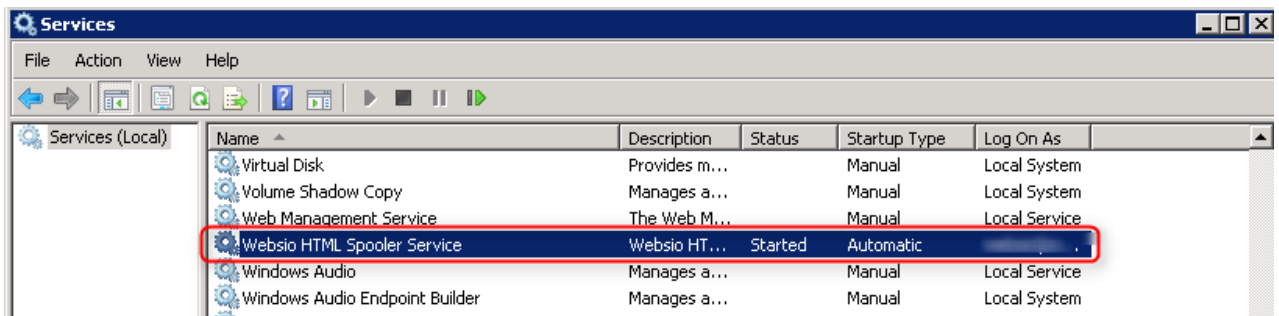
1. Download required Extensions from the Document Preview page:
<http://www.websio.com/product.aspx?ID=133>
2. Extract zip on your SharePoint server
3. Right-click on the setup.exe and select “Run as Administrator” in order to begin the installation wizard.
4. Repeat steps 1-3 on each SharePoint front-end server

Preview Extensions Configuration

Visio and CAD Extensions do not require additional configuration steps.

Web Extension Configuration:

Web Extension is a Windows Service named “Websio HTML Spooler Service”.

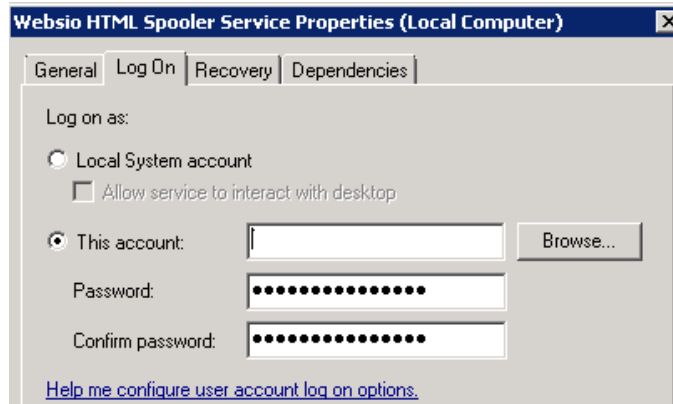


1. Double-click on the service name, open tab “Log On” and select account, which will be used to access web pages and InfoPath Forms. The account has to have at

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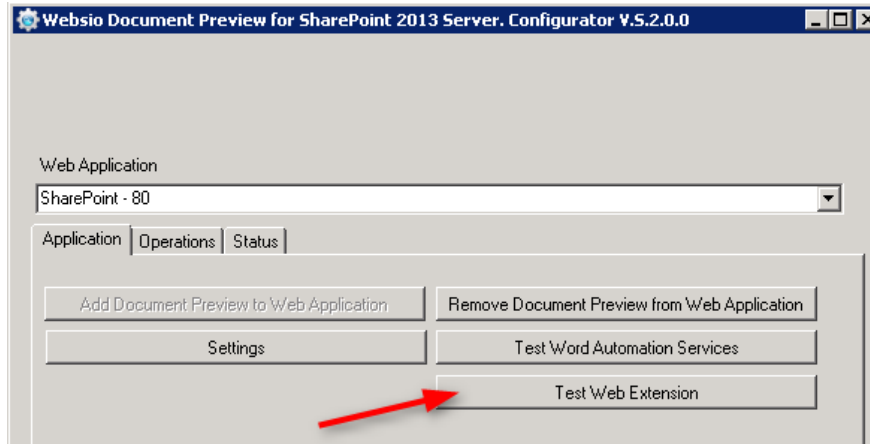
least SharePoint Reader role for all crawled content.



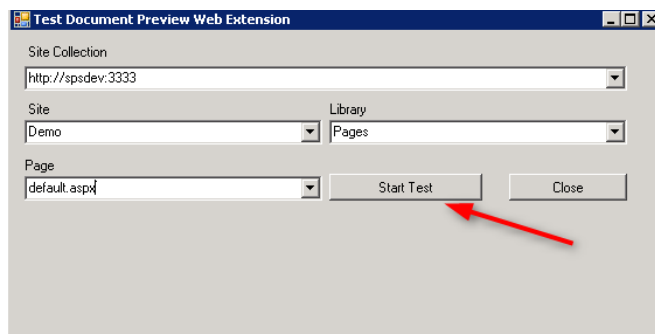
2. Restart the service

Test Web Extension:

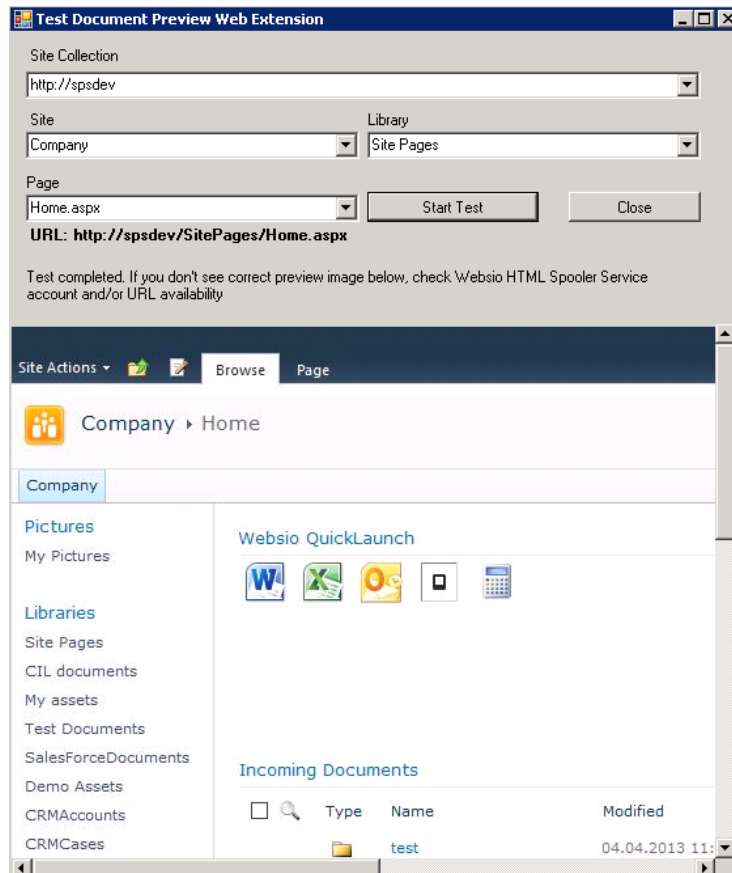
1. Open Document Preview Configurator, select Web Application and click on the “Test Web Extension”



2. In the new opened window select one of your web pages and click on the “Start Test”



3. When the test will be completed preview image will be displayed in the bottom part of the screen



4. If the preview is not displayed correctly, use another service account and/or test page URL availability from the server.

Repeat Web Extension installation and test steps on each SharePoint front-end server.

FAST Search Configuration

Important! Use this section instructions after you performed all steps described in the previous paragraph "Initial Configuration" only!

1. Open Metadata Properties from the Central Administration -> FAST Search Configuration. Look for property named "WebsioPreview".
2. If the property does not exist, press on the "New Managed Property".

Crawled properties are automatically extracted from crawled content. Users can perform queries over managed properties. Use crawled properties to managed properties. Changes to properties will take effect after the next full crawl.

New Managed Property Crawled Properties Categories					
Total Count = 127					
Property Name	Type	May be deleted	Use in scopes	Optim	
Size	Integer	Yes	No	No	
Skills	Text	Yes	No	No	

Otherwise press on the property name to open property definitions window

urn:schemas-microsoft-com:sharepoint:portal:area:Path	Text	Yes	No
UserName	Text	Yes	No
UserProfile_GUID	Text	No	No
WebId	Text	Yes	No
WebsioPreview	Text	Yes	No
WikiCategory	Text	Yes	Yes

In the new open window set Property name to "WebsioPreview". **Important!** Name is case-sensitive.

Use this page to view and change the settings of this property.

Name and type

Type a name for this property, and select the type of information you want to store in this property.

Property name: *
WebsioPreview

Description:
WebsioPreview

Select the "Has Multiple Values" checkbox to enable storing multiple values for a given item with this property.

The type of information in this property: Text

☐ Has Multiple Values

Mappings to crawled properties

A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.

☒ Include values from all crawled properties mapped
☐ Include values from a single crawled property based on the order specified

Crawled properties mapped to this managed property:

ows_Websio_x0020_Document_x0020_Preview(Text)	Move Up	Move Down	Add Mapping	Remove Mapping
---	---------	-----------	-------------	----------------

Use in scopes

☐ Allow this property to be used in scopes

- Press button "Add Mapping". Crawled property selection window will be opened.
Type word "websio" in the Crawled property name and press "Find".

Crawled property selection

Select crawled properties to map to WebsioPreview(Text)

Select a category:
All categories

Crawled property name:
websio

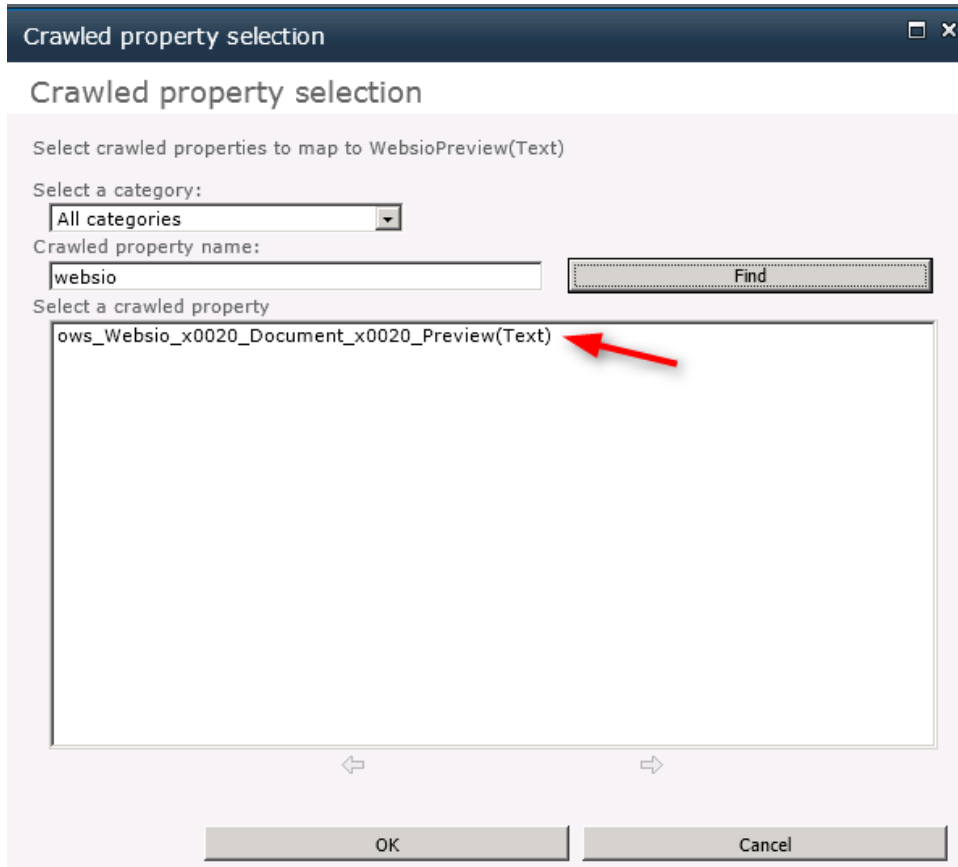
Find

Select a crawled property

_dlc_DocIdItemGuid(Text)
0xf(Text)
Basic:10(Integer)
Basic:10(Text)
Office:10(Integer)
Office:10(Date and Time)
Category 2:100(Integer)
Category 3:100(Integer)
Basic:11(Text)
Basic:11(Text)
Office:11(Date and Time)
Basic:12(Integer)
Basic:12(Integer)
Office:12(Date and Time)
Office:13(Date and Time)
Office:13(Text)
Category 4:13(Text)
Basic:14(Date and Time)
Office:14(Integer)
Office:14(Text)

OK Cancel

4. Select crawled property and press "OK".



Crawled property selection

Crawled property selection

Select crawled properties to map to WebsioPreview(Text)

Select a category:
All categories

Crawled property name:
websio

Find

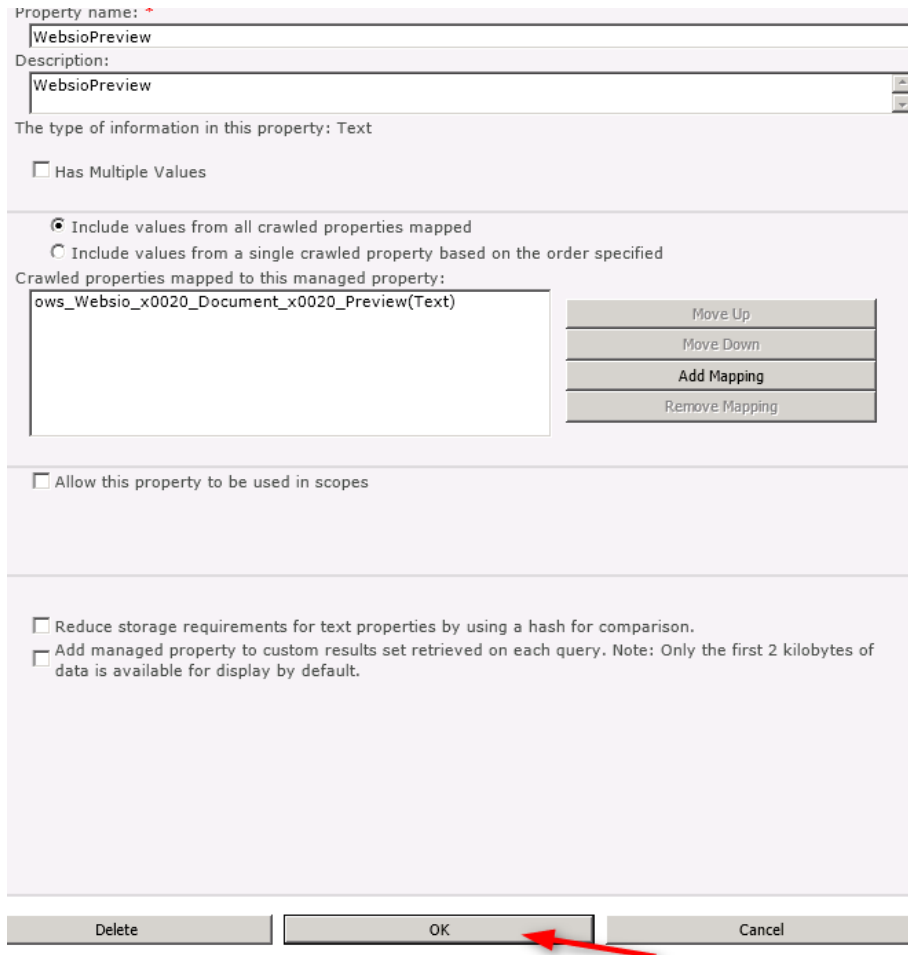
Select a crawled property

ows_Websio_x0020_Document_x0020_Preview(Text)

OK Cancel

5. If number of properties will be found, repeat steps 4-5 to add all crawled properties containing verb "websio" to the mapping.

6. Press "OK" to save managed property settings.



Property name: *
WebsioPreview

Description:
WebsioPreview

The type of information in this property: Text

☐ Has Multiple Values

☒ Include values from all crawled properties mapped
☐ Include values from a single crawled property based on the order specified

Crawled properties mapped to this managed property:

ows_Websio_x0020_Document_x0020_Preview(Text)	Move Up
	Move Down
	Add Mapping
	Remove Mapping

☐ Allow this property to be used in scopes

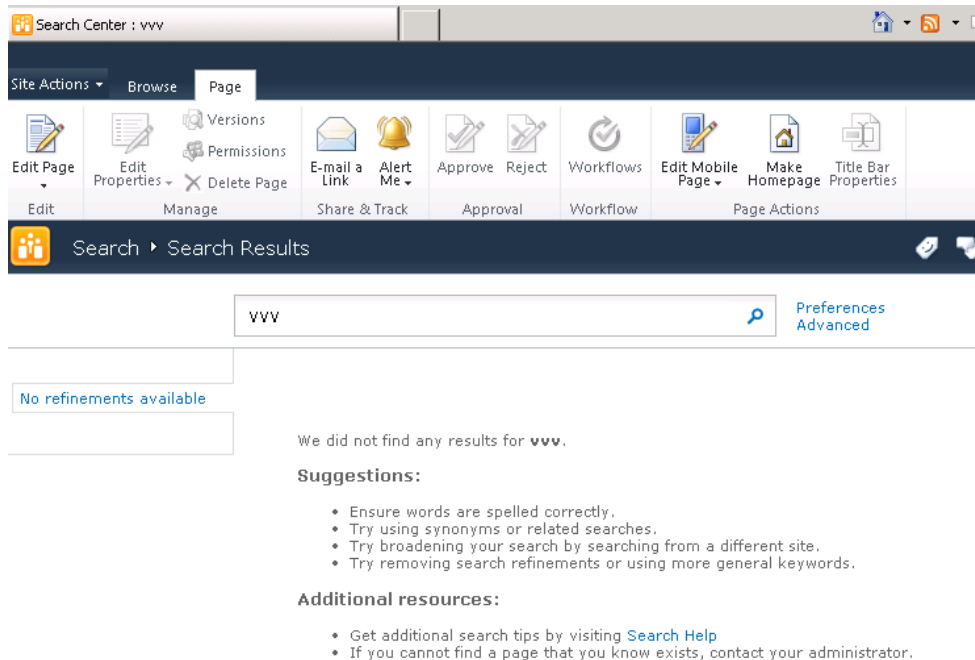
☐ Reduce storage requirements for text properties by using a hash for comparison.
☐ Add managed property to custom results set retrieved on each query. Note: Only the first 2 kilobytes of data is available for display by default.

Delete OK Cancel

7. Run full crawl for all content sources.

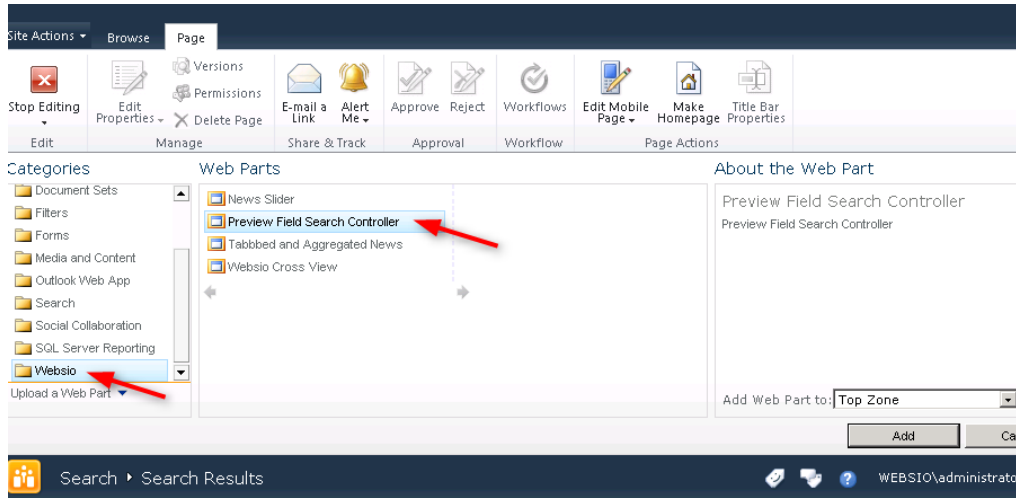
How to add preview to the search results

1. Open your SharePoint or FAST Search Center Site
2. Execute any "dummy" search to open Search Results Page

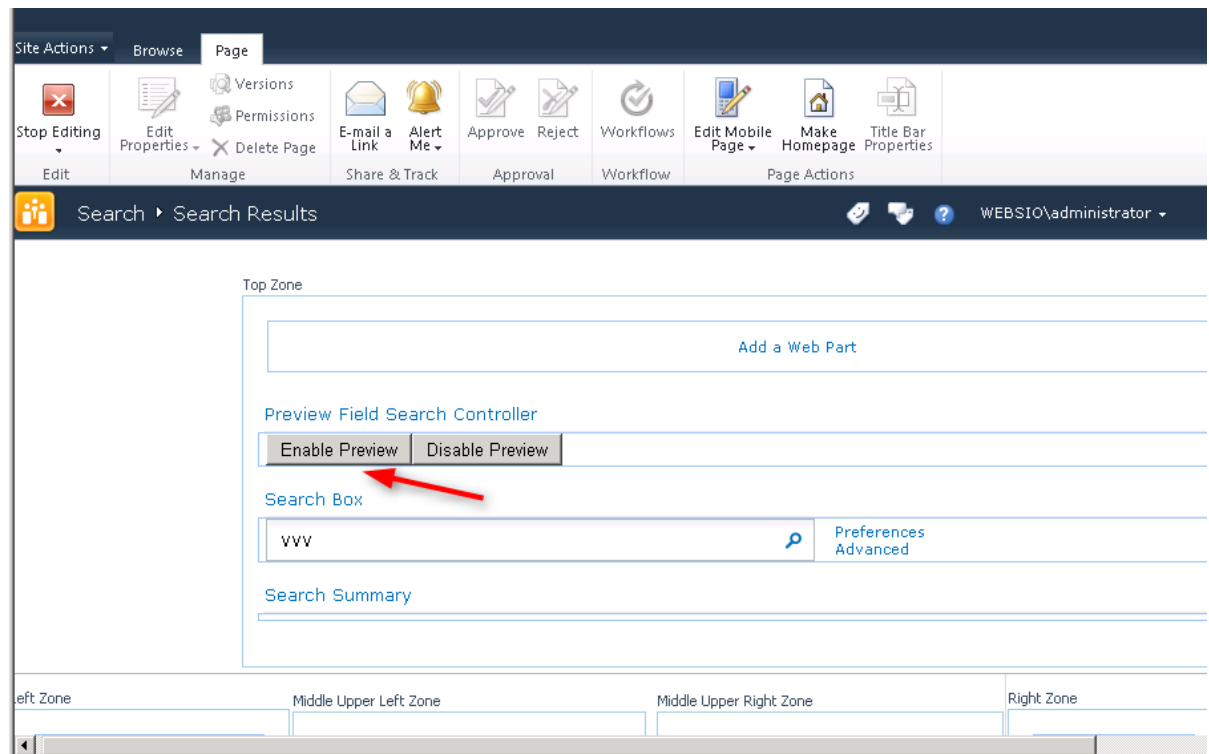


3. Select "Edit Page" from the "Site Actions"

4. Add web part "Preview Field Search Controller" to any web part zone on the page



5. New web part with two buttons will appear. Press "Enable Preview"





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Please pay attention: The web part is visible in the edit mode only. Don't remove this Web Part from the page.

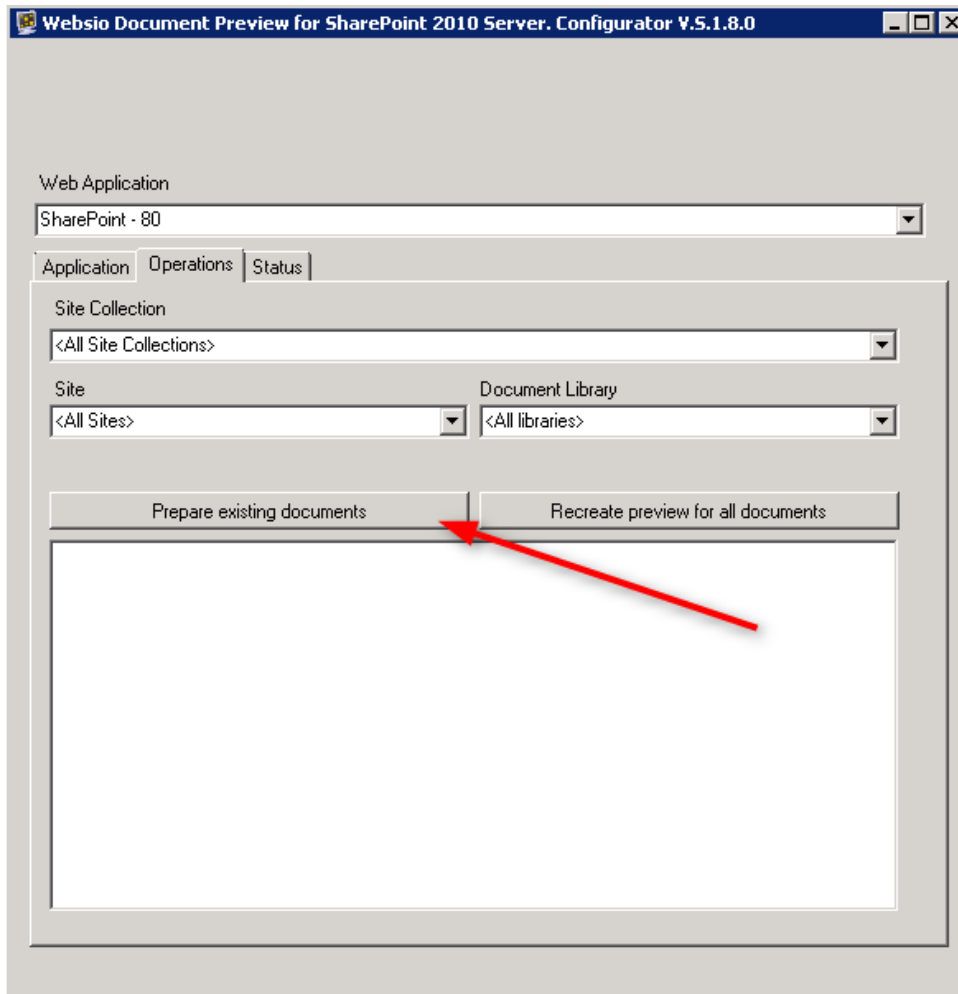
6. Save and publish Search Results Page if necessary.

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How to add preview to all existing documents

1. Configure Web Application as shown in the "Initial Configuration"
2. Open tab "Operations" and press button "Prepare existing documents"



3. "Document Preview Timer Job" at the next run time will add preview to all supported documents, which doesn't contain preview.



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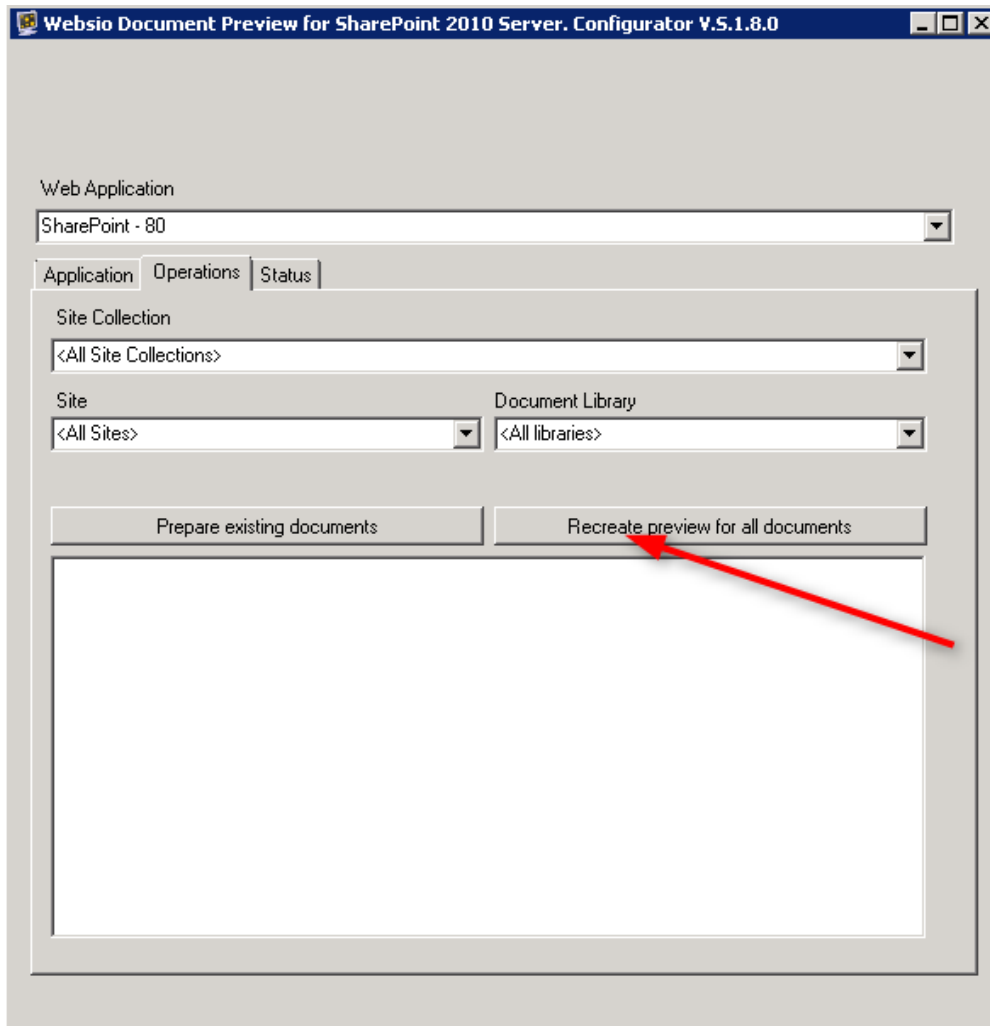
4. **Please pay attention:** this operation may be time and resource expensive, depending on you documents count. Please consider to run this step at evening or in other non-working time.

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How to recreate preview for all existing documents

1. Configure Web Application as shown in the "Initial Configuration"
2. Open tab "Operations" and press button "Recreate preview for all documents"



3. "Document Preview Timer Job" will add preview to all supported documents at the next run time.



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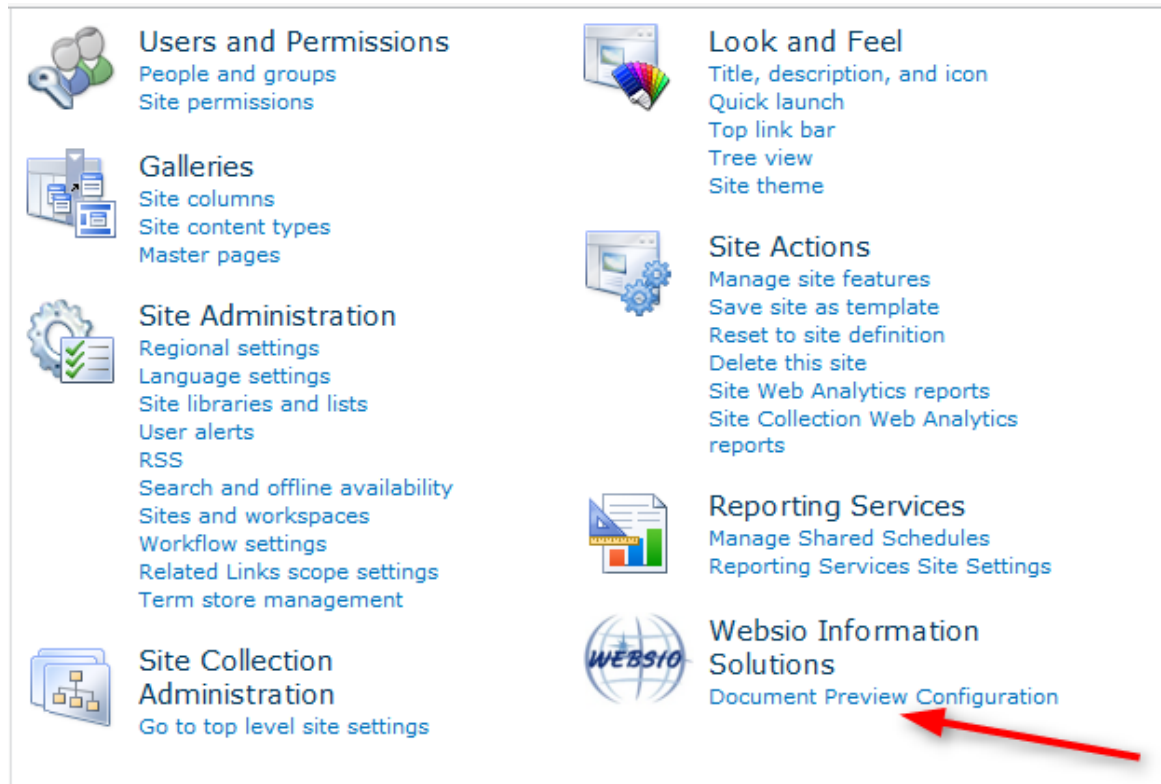
4. **Please pay attention:** this operation may be time and resource expensive, depending on your documents count. Please consider to run this step at evening or in other non-working time.

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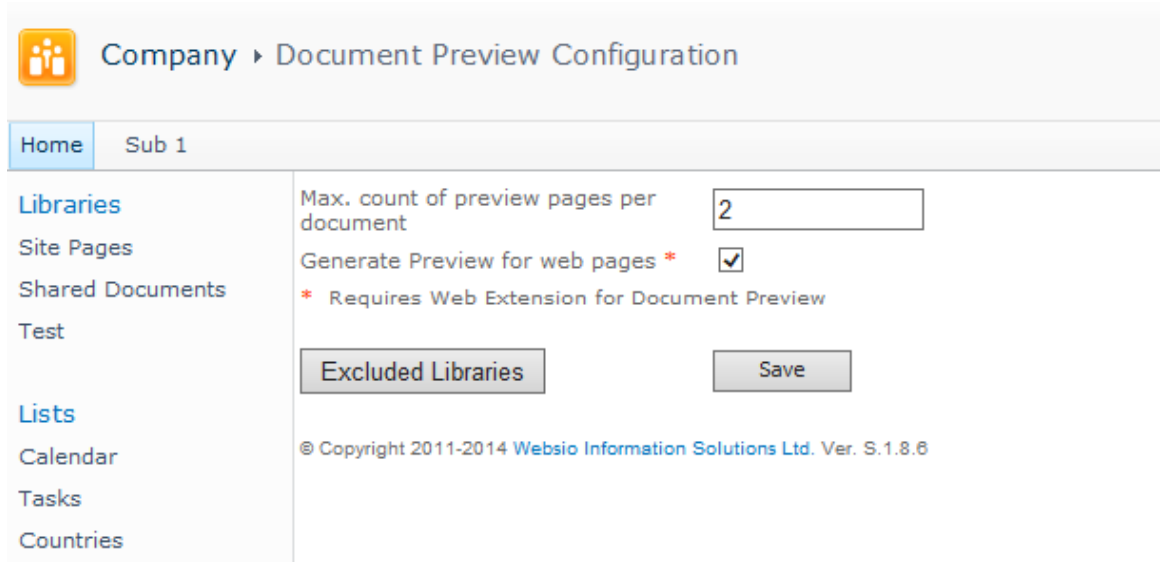
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Preview pages count

1. By default, preview image will be created for the two first document pages. You can change this setting on the site-collection level:
 - 1.1. Open site settings of the top-level site
 - 1.2. Select Document Preview Configuration



1.3. Set required pages count in the new opened window



Company > Document Preview Configuration

Home Sub 1

Libraries
Site Pages
Shared Documents
Test

Lists
Calendar
Tasks
Countries

Max. count of preview pages per document

Generate Preview for web pages * ☒

* Requires Web Extension for Document Preview

Excluded Libraries Save

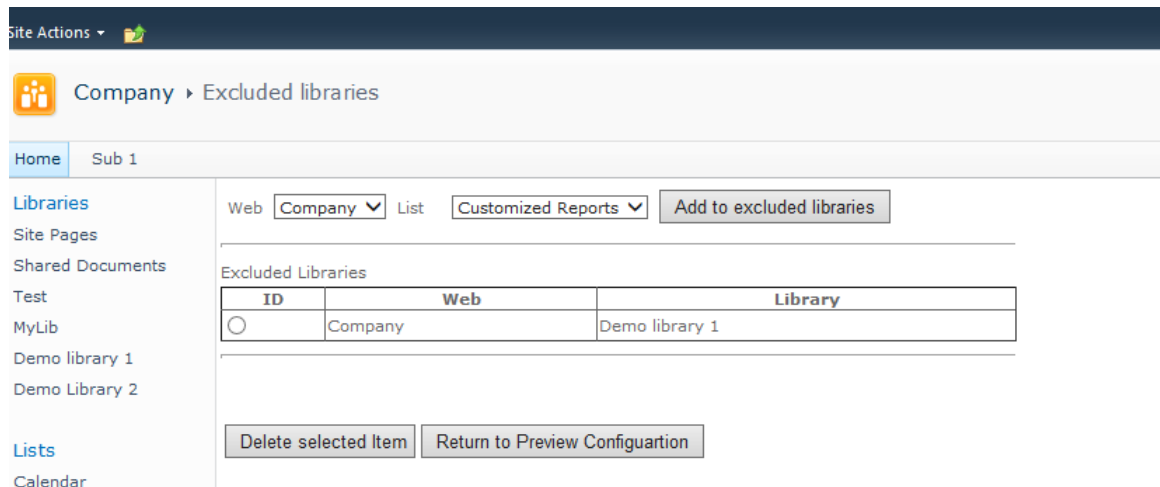
© Copyright 2011-2014 Websio Information Solutions Ltd. Ver. S.1.8.6

1.4. Press "Save"

1.5. New settings applies to the new and/or modified documents only. To reset preview for all existing documents see section "[How to recreate preview for all existing documents](#)".

Excluded Libraries

1. You can exclude specific libraries from the “thumbnailing” process
2. Open Document Preview Settings as described in the previous paragraph and click on the “Excluded Libraries”



Site Actions ▾

Company ▸ Excluded libraries

Home Sub 1

Libraries

Site Pages

Shared Documents

Test

MyLib

Demo library 1

Demo Library 2

Lists

Calendar

Web Company ▾ List Customized Reports ▾ Add to excluded libraries

Excluded Libraries

ID	Web	Library
<input type="radio"/>	Company	Demo library 1

Delete selected item Return to Preview Configuration

3. Select web and library names and click on the button “Add to excluded libraries”
- The Preview will not be added to the new or modified documents in excluded libraries. Preview icon will be removed from previously created documents in the next 24 hours.

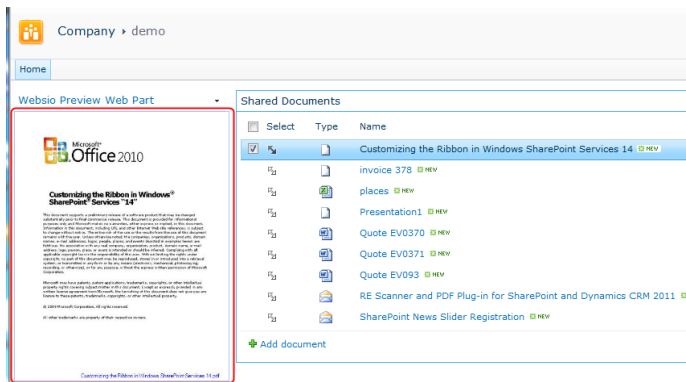
Optional: Document Preview Web Part.

You can use Document Preview Web Part in addition to the standard previews displayed on mouse over and mouse click.

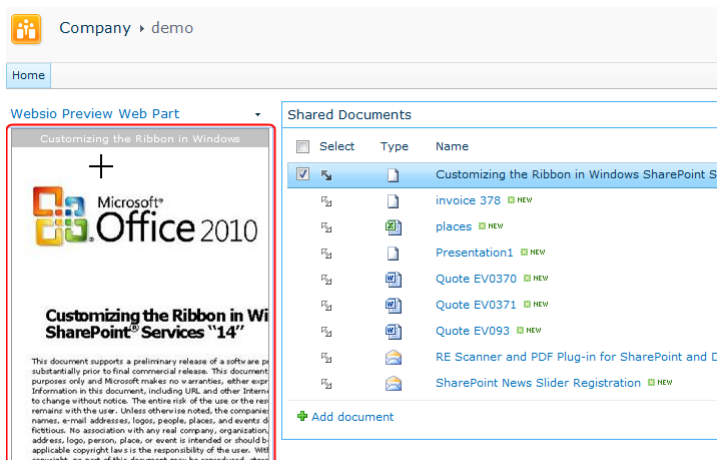
You can connect the Web Part to the standard List View web part (or any other web part working as row connection provider) or to the fixed document URL.

Important! To use Document Preview Web Part you must configure Websio Document Preview as shown in the previous paragraphs.

Initial view:

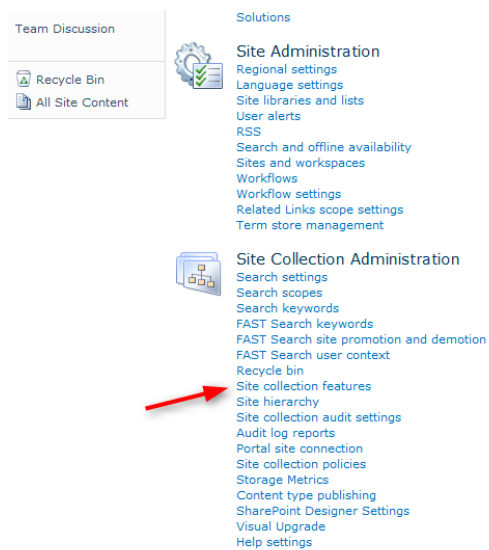


Move mouse over the web part to zoom in the image:

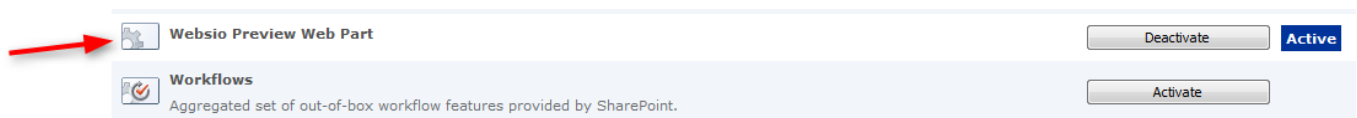


How to enable Document Preview Web Part

1. Open top-level Site Settings -> Site Collection Administration -> Site collection features

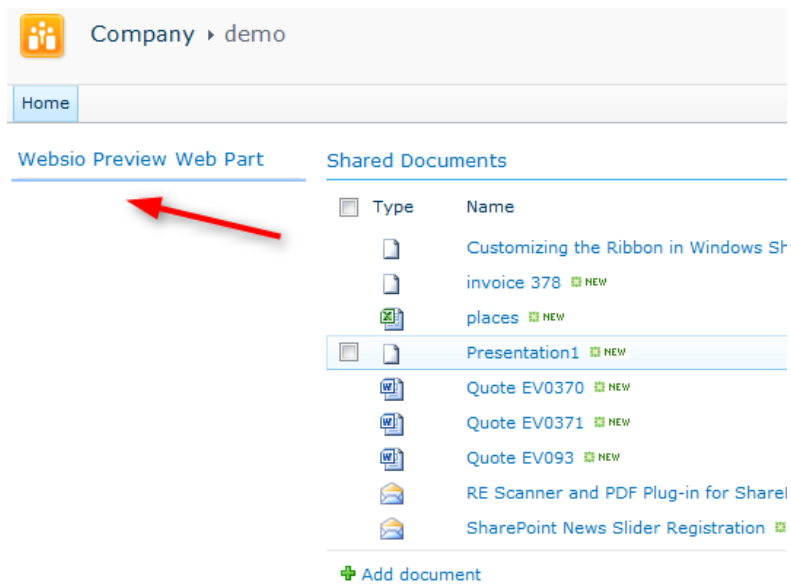


2. Activate Document Preview Web Part feature

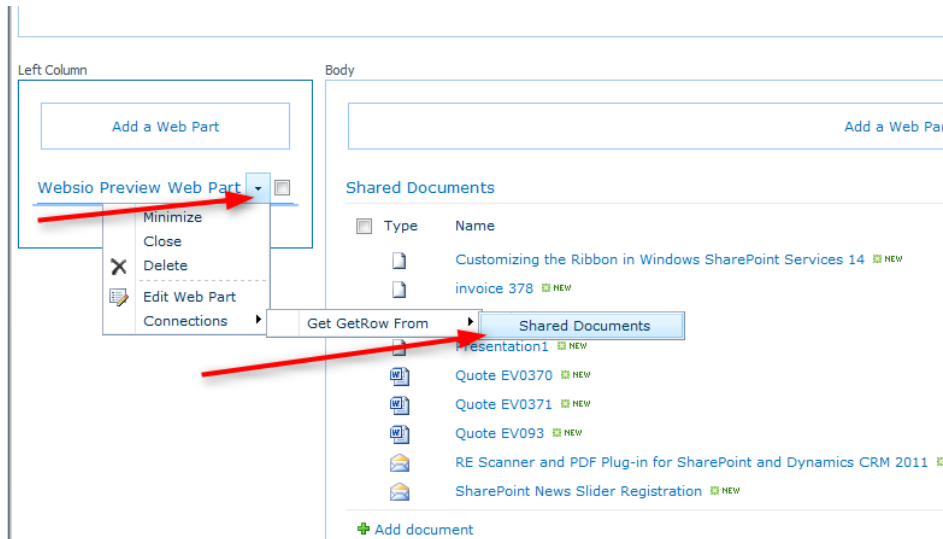


Option 1: Connect Document Preview Web Part to Document Library

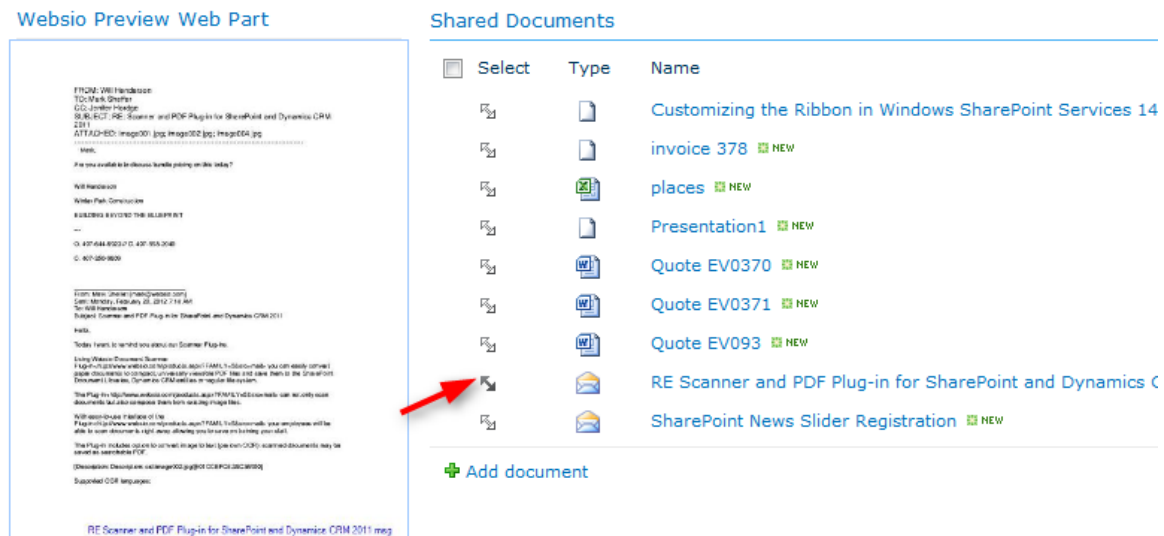
1. Place Preview Web Part to the page with Document Library or any other web part working as row connection provider



2. While your page is in the Edit Mode, connect Preview Web Part to the Document Library:

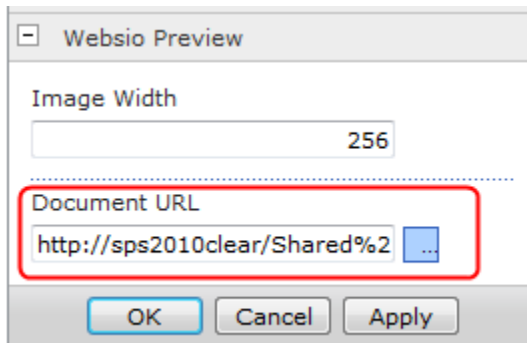


3. Save your page and select one of the documents:



Option 2: Connect Document Preview Web Part to the document URL

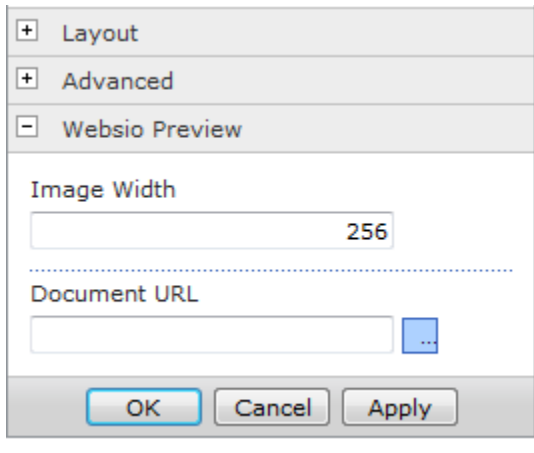
Add Websio Document Preview web part to your page, open Web Part properties and set property Document URL to the document URL:



Important! The document must belong to the same site as the page with Websio Preview Web Part.

Important! The web part will not accept connection when property Document URL is not empty.

Web Part Properties



The dialog box shows three expandable sections: 'Layout', 'Advanced', and 'Websio Preview'. The 'Websio Preview' section is currently expanded, showing two input fields. The first field is labeled 'Image Width' and contains the value '256'. The second field is labeled 'Document URL' and is empty, with a blue ellipsis button to its right. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

1. Image Width – initial preview width (image height is calculated automatically based on preview image proportions)
2. Document URL – fixed URL. See section "Connect Document Preview Web Part to the fixed document" above for additional details



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Special case - Content Deployment Configuration

Source server(s) installation – regular installation and configuration (as described above)

Destination server(s) installation:

1. Install Document Preview as described above
2. Run the Configurator.
3. Don't use any Configurator button! Simply close it.
4. When both Source and Destination sites belong to the same SharePoint farm, you have to run Web Application of the Destination site under account that has no rights to the Source site.

Special case - Content Type HUB Configuration

1. Install and configure Document Preview as described above in the sections "[Initial Configuration](#)" and "[How to add preview to all existing documents](#)"
2. Remove Websio Preview Field from the content types "Document" on all your site-collections to avoid problems with Content Type Hub.

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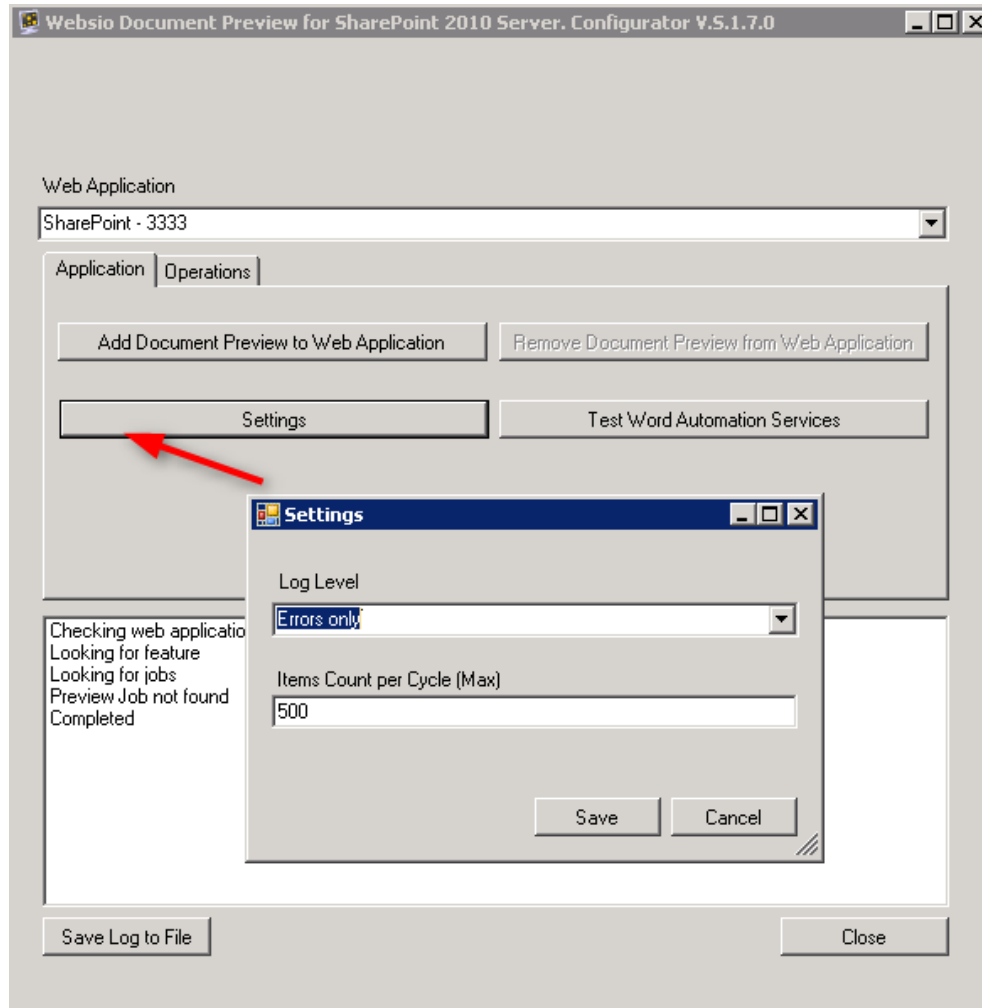


Settings

1. Log Files. Document Preview creates log files in "\Program Files\Websio Information Solutions\Document Preview 2010\Log". You can select to log error messages only or all messages.
2. Items Count per Cycle. This parameter defines maximal items count to "thumbnail" per one Document Preview Timer Job run cycle. Please don't change this value if it is not really necessary. Default settings are optimized for best performance for sites containing up to millions documents.

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Appendix A. How it works. Technical Overview

Supported formats

1. Microsoft Word

- Open XML File Format Document (.docx)
- Open XML File Format Document with code (.docm)
- Open XML File Format Template (.dotx)
- Open XML File Format Template with code (.dotm)
- Word 97-2003 Document (.doc)
- Word 97-2003 Template (.dot)
- Rich Text Format files (.rtf).
- Single File Web Pages (.mht, .mhtml).

2. Microsoft Excel

- Excel Workbook (.xlsx)
- Excel Workbook with code (.xlsm)
- Excel Template (.xltx)
- Excel Template with code (.xltm)
- Excel 97- Excel 2003 Workbook (.xls)
- Excel 97- Excel 2003 Template (.xlt)
- Microsoft Excel 5.0/95 Workbook (.xls)
- Comma delimited (.csv)

3. Microsoft PowerPoint



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- PowerPoint Presentation (.pptx)
 - PowerPoint Presentation with code (.pptm)
4. Web Pages (.html, .aspx) ****
5. InfoPath Forms (web enabled) ****
6. Text files (.txt)
7. Microsoft Visio *
- Visio Drawing (.vsd)
 - Visio Drawing XML File (.vdx)
 - Shapeware Visio Smartshapes File (.vss)
 - Visio Template (.vst)
 - Visio Template XML File (.vtx)
 - XML for Visio Stencil File (.vsx)
8. Image files
- Bitmap (.bmp)
 - Extended (Enhanced) Windows Metafile Format (.emf)
 - Exchangeable Image Information File (.exif)
 - Graphic Interchange Format (.gif)
 - Icon (.ico)
 - JPEG (.jpg, .jpeg)
 - Portable Network Graphic (.png)
 - Photoshop Format (.psd) **

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- Tagged Image Format File (.tif, .tiff)
- Windows Metafile (.wmf)

9. Adobe

- Acrobat files (.pdf)
- Adobe Illustrator files (.ai)
- Encapsulated PostScript files (.eps)

10. Email files (.msg, .eml)

11. CAD Files (.dwg, .dxf) ***

- * Visio Extension for Document Preview is required
- ** Photoshop Extension for Document Preview is required
- *** CAD Extension for Document Preview is required. List of supported CAD objects:
<https://www.woutware.com/cadLib/4.0/features> .
- **** Web Extension for Document Preview is required.

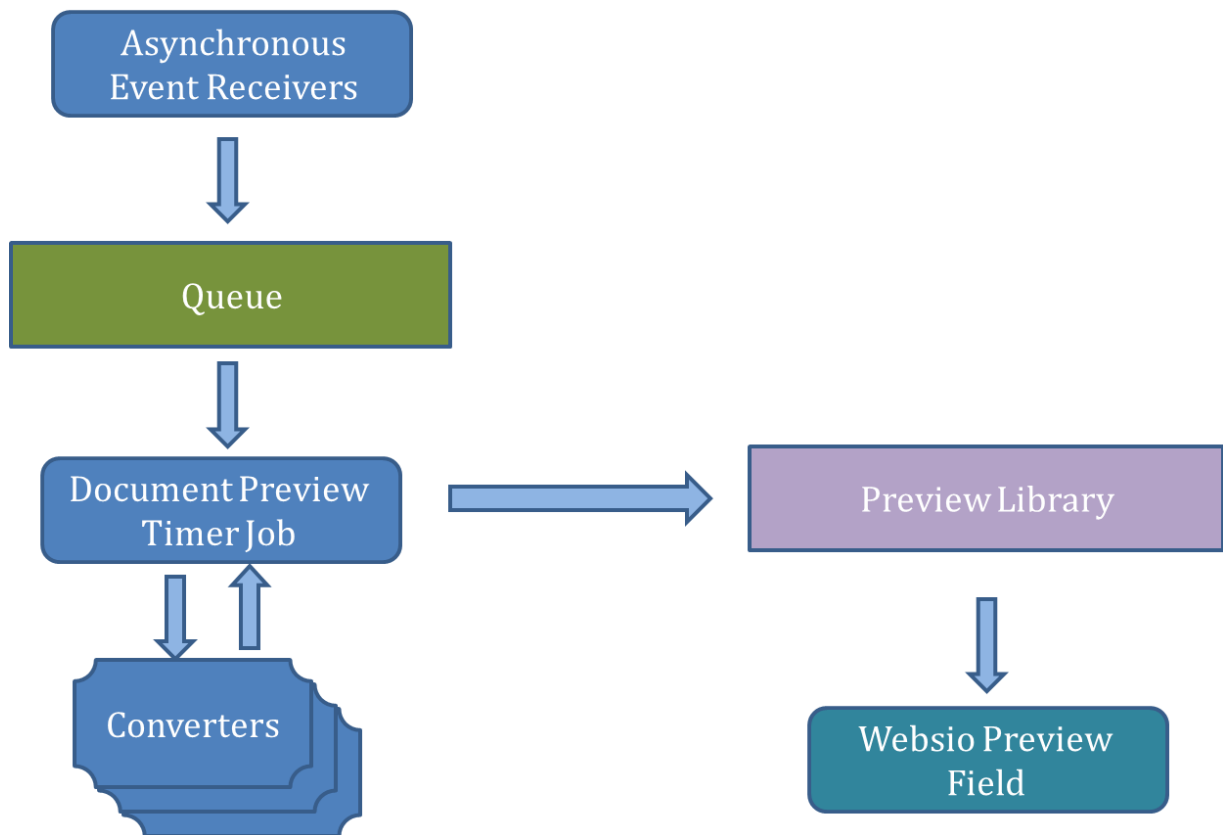
You can download all mentioned above extensions from our site:

<http://websio.com/product.aspx?ID=119>

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Logical structure



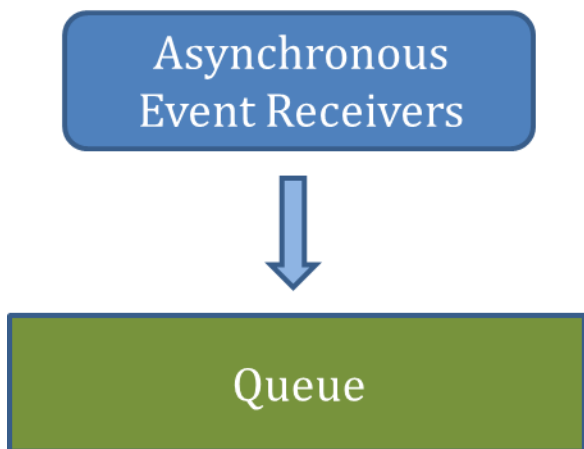


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Preview Generation

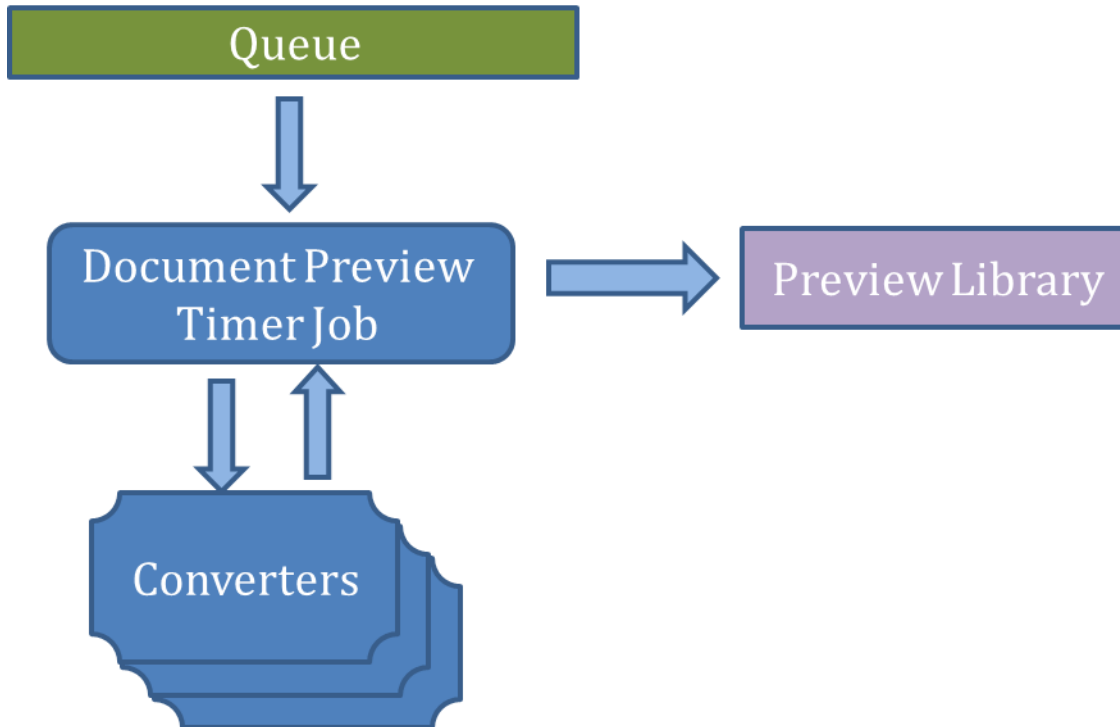
New or modified documents are placed to the queue



Document Preview Timer Job is responsible for actual preview generation

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1. Document Preview Timer Job :

- Developed as SharePoint Timer Job
- Reads documents waiting for preview generation from the Queue
- Sends each document to one of the converters. Converter selection depends on the document type
- Reads prepared previews from the converters
- Encrypts preview images
- Adds encrypted images to the Preview Library

2. Converters:

- Generate preview images from original documents

- Two types: asynchronous (for all Office documents) and synchronous (PDF, txt, etc.)
3. Preview Library
- Realized as hidden document library
 - Contains encrypted preview images

Performance

Document Preview Timer Job performance depends on many parameters like SharePoint farm hardware, available system resources, etc. Approximated values for the average farm:

#	Document type	Documents converted per hour
1	Word/ Excel, CAD	1500 – 2500
2	PDF, Text files, Emails, PowerPoint, Visio, Web pages	2500 - 3500
3	Image files	5000 - 6000

Security

1. Document Preview is a set of native SharePoint components (Timer Job, Custom Field and Event Handlers).
2. Document Preview has no own external network interface, user definitions, etc. SharePoint OOTB manages all requests.



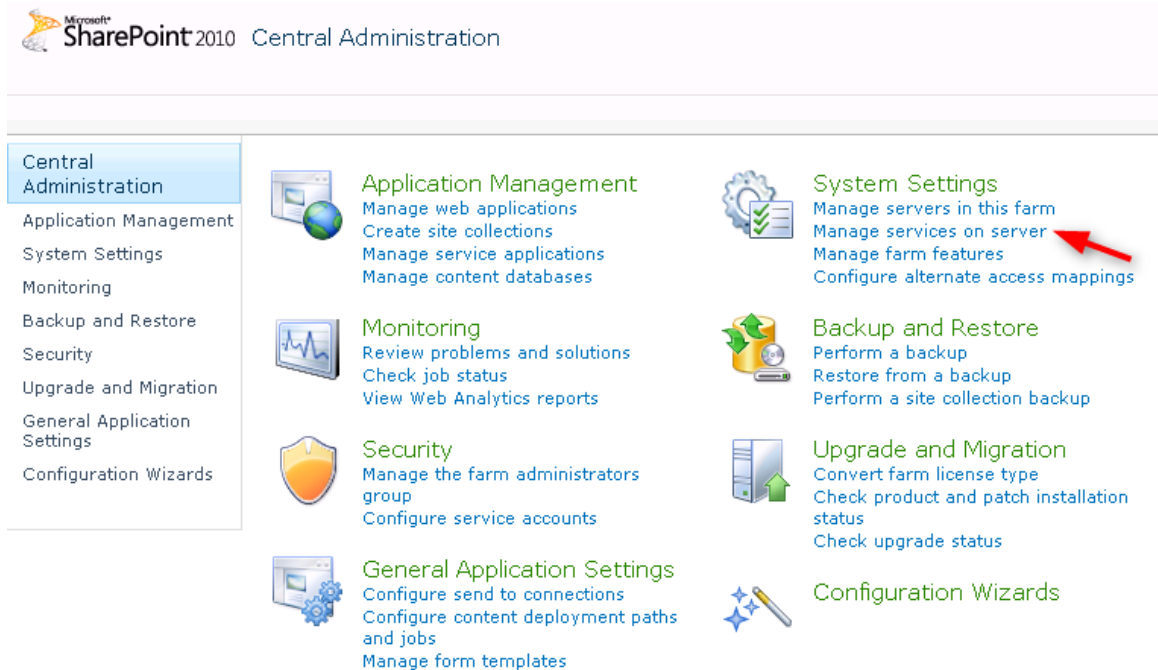
3. In addition to security mechanisms provided by IIS/SharePoint, Document Preview stores preview images in the encrypted form. The encryption prevents situations, when user with full permissions to the site but without permissions to specific document can access preview image using hyperlink.

Appendix B. How to configure Word Automation Services on SharePoint 2010

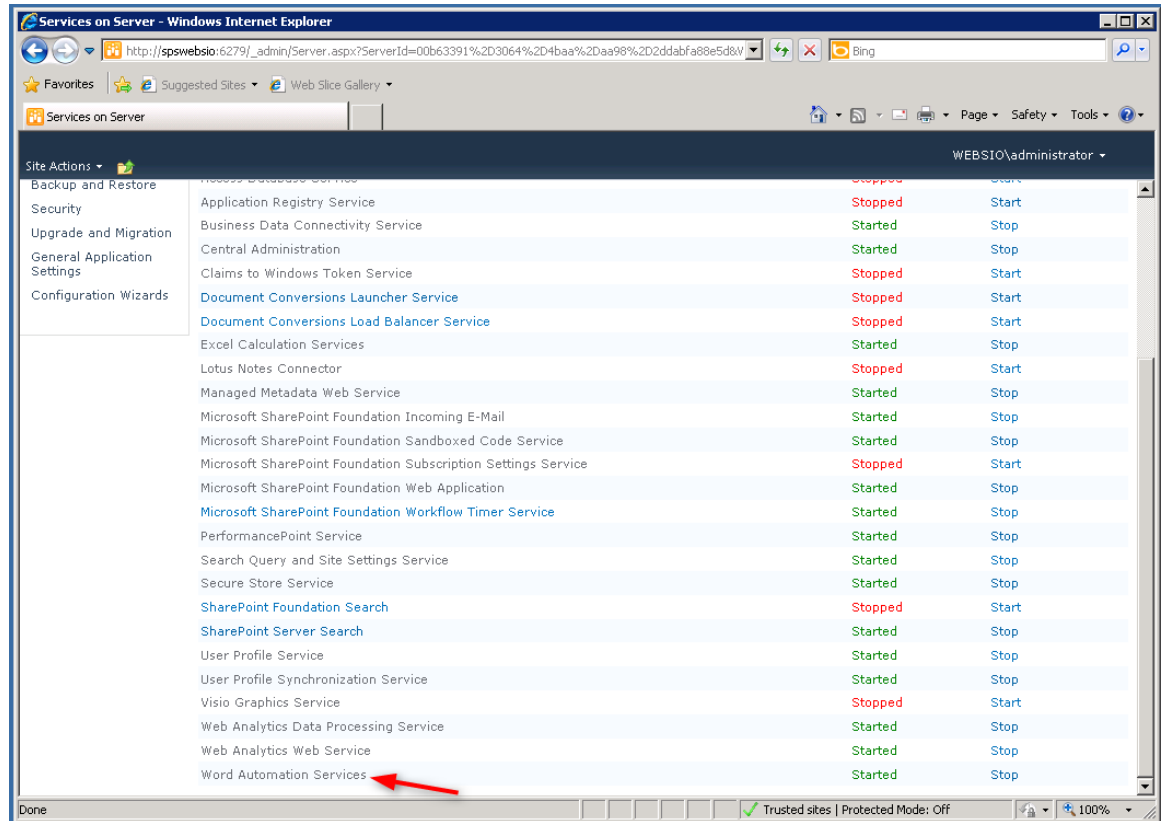
Word Automation Services should be installed and started in SharePoint Server 2010 by default.

In order to double check the configuration and/or change it, follow the next steps:

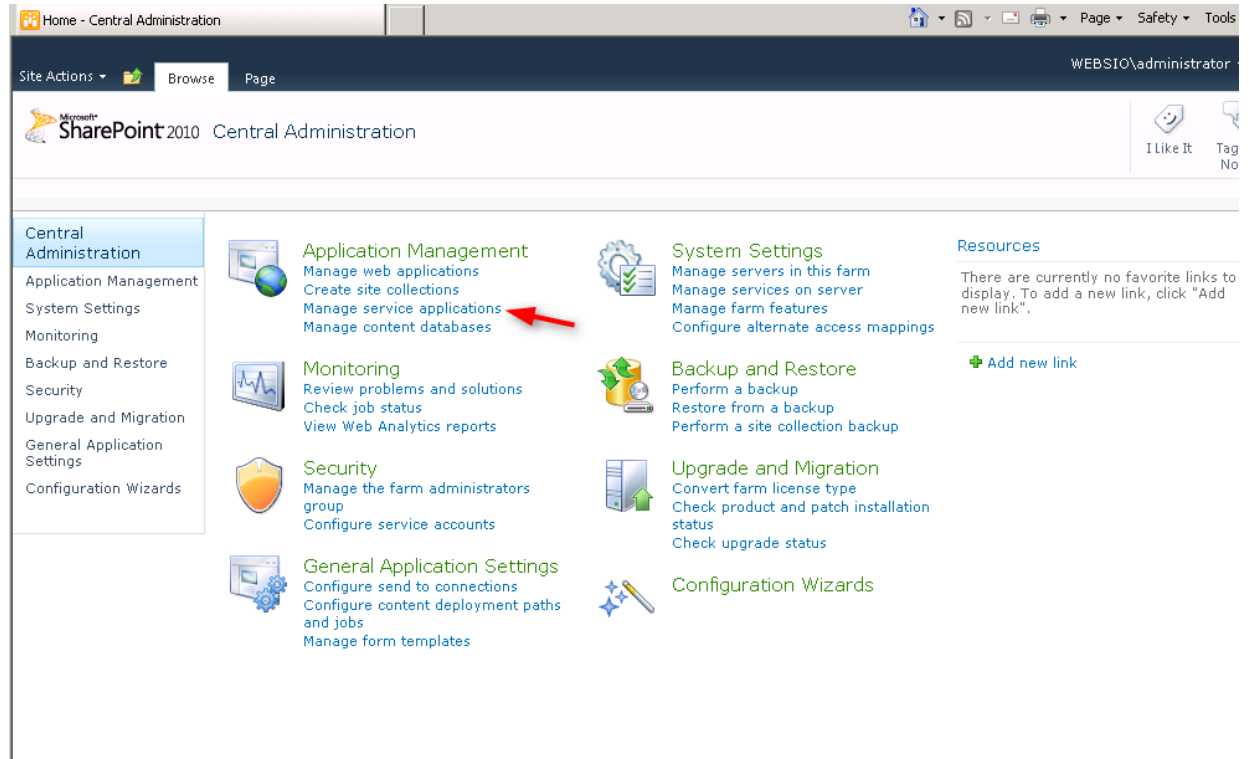
1. Start SharePoint 2010 Central Administration and select Manage Services on server



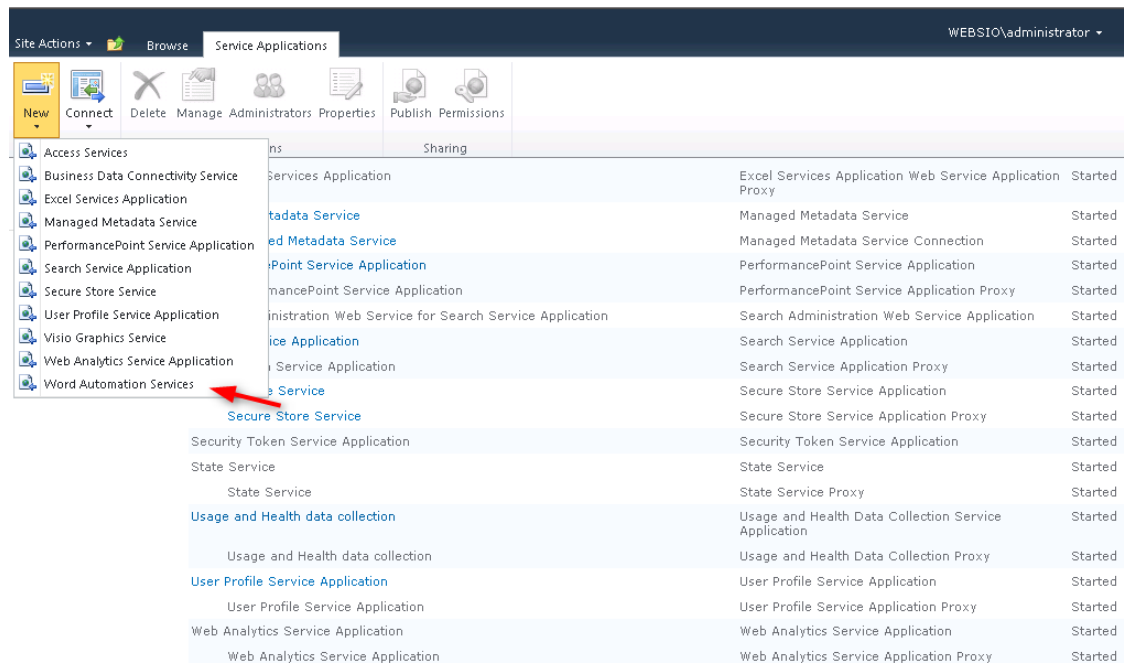
2. Start Word Automation Services



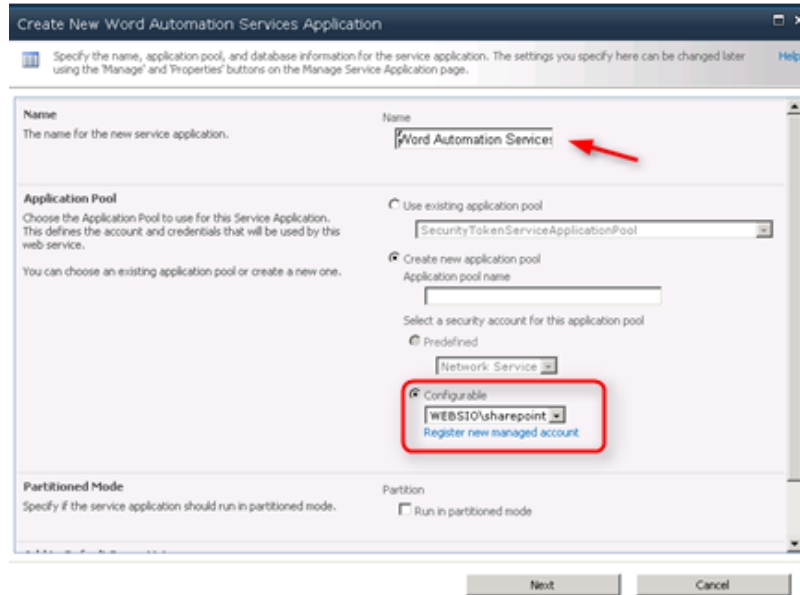
3. Return to Central Administration and select "Manage Service Applications"



4. In the Service Applications administration page, service applications are sorted alphabetically. Scroll to the bottom of the page, and look for Word Automation Services. **If this service is present, delete it.**
5. Press "New" and select "Word Automation Services" from the list.

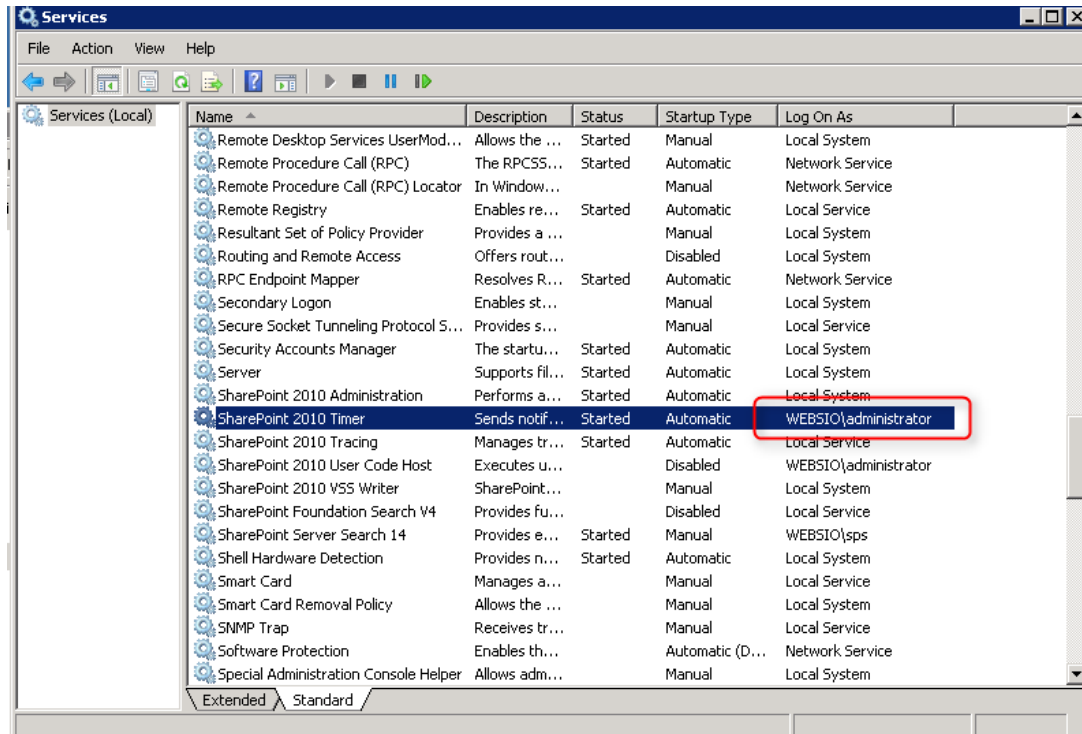


6. In the new opened window fill fields "Name" (recommended value: "Word Automation Services") and "Application pool name".

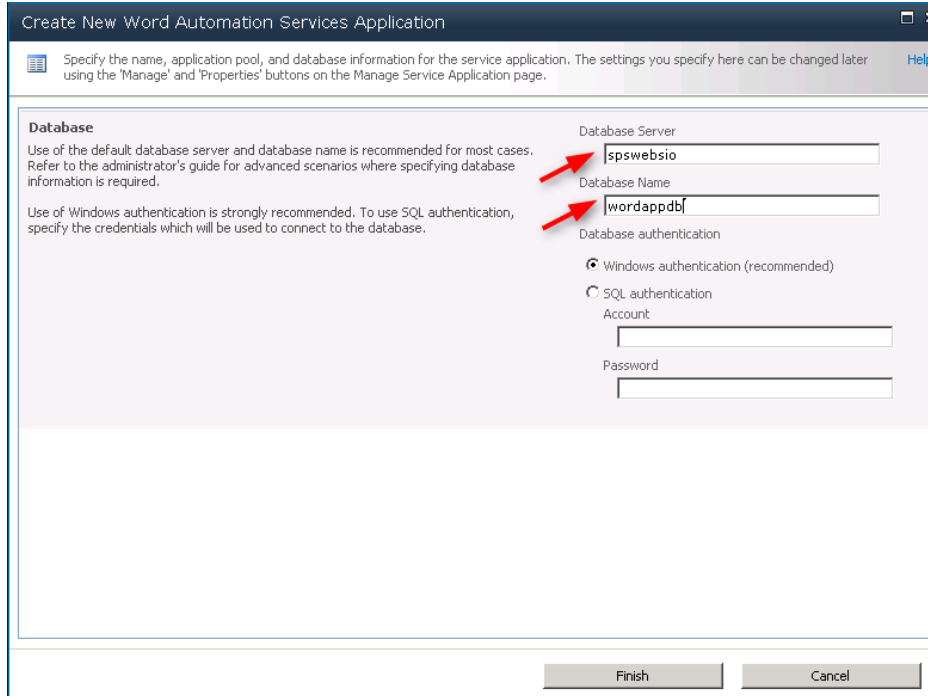


7. **Important!** Managed account must have access to all documents in all your site-collections. The best way is to use account configured for SharePoint Timer

Service. You can find this account using Windows Services:



8. On the next screen fill fields "Database Server" and "Database Name".



Create New Word Automation Services Application

Specify the name, application pool, and database information for the service application. The settings you specify here can be changed later using the 'Manage' and 'Properties' buttons on the Manage Service Application page. [Help](#)

Database

Use of the default database server and database name is recommended for most cases. Refer to the administrator's guide for advanced scenarios where specifying database information is required.

Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.

Database Server:

Database Name:

Database authentication

☒ Windows authentication (recommended)

☐ SQL authentication

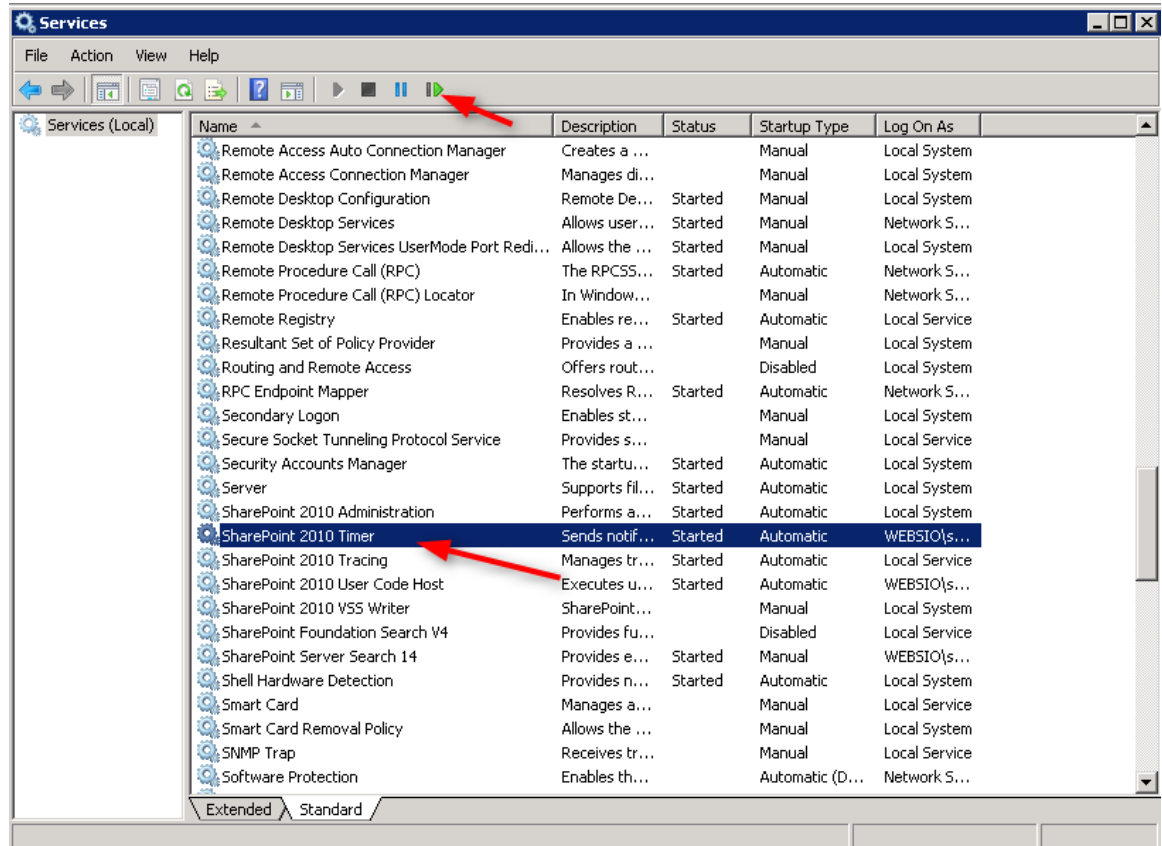
Account:

Password:

Finish Cancel

9. Press Finish.
10. **Important!** Restart IIS. Use `iisreset /noforce` from the Command Prompt

11. **Important!** Open Services from server Administration tools and restart SharePoint 2010 Timer service



12. Read SharePoint 2010 documentation how to configure additional parameters of the Word Automation Services



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