

Kofax Export Connector 8.2.0 for Microsoft SharePoint

Release Notes



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Release Notes

These release notes include the information you need to successfully install Kofax Export Connector – Microsoft SharePoint supports Microsoft SharePoint. This export connector copies document images, OCR full text files, Kofax PDF documents, and eDocuments to permanent storage and writes data from Kofax Capture into the Microsoft Office SharePoint repository.

Please read these release notes carefully as they contain information not included in the Kofax Export Connector – Microsoft SharePoint Help or PDF documentation.

If you downloaded Kofax Export Connector – Microsoft SharePoint from the Kofax Electronic Delivery site, you can extract the files from the ISO file. Refer to the instructions on the site. Or, you may have received Kofax Export Connector – Microsoft SharePoint as a package that includes electronic media. In these release notes, we refer to both the extracted files and the electronic media as the product files.

New Features

This section contains information about features provided with Kofax Export Connector – Microsoft SharePoint

SharePoint Online for Office 365 Support

Kofax Export Connector – Microsoft SharePoint supports exporting documents to SharePoint Online for Office 365. Note that when using SharePoint Online, this export connector only supports the “Office ID”; it is not possible to access the SharePoint Online content by using credentials from your local domain. This means that “Credentials of the current user” will not enable access.

Repository Document ID Support

This export connector now supports the {Repository Document ID} Kofax Value.

User Defined Retries and Timeout Values

By making simple changes to an XML file, you can now compensate for network issues by adjusting the number of retries and the timeout period.

New in the Prior Version of Kofax Export Connector – Microsoft SharePoint

Folders and Document Sets

If a folder or document set does not exist, it is created by the export process and their fields are populated. If the document set or folder already exists, and there is a field with an

empty value in SharePoint, that field is updated in the folder or document set if the current document has a value for it.

The export connector creates Document Sets within the target library for SharePoint 2010 systems. The configuration allows for designating a target folder as a Document Set content type. When a document is exported, the configured Document Set is created or updated at the configured location.

Library Type Support

The export connector supports all library types that are based on the “Document Library” type in SharePoint. This means that all custom libraries that are based on the Document Library are also supported.

Image Support

This export connector now supports Multipage TIFF – LZW in addition to the formats supported in the prior release.

Single Sign On

Kofax Export Connector – Microsoft SharePoint now optionally allows you to take advantage of single sign on so that the credentials of the currently logged on Windows user are used to automatically log in to the export connector.

Known Problems

This section contains information about known problems with Kofax Export Connector – Microsoft SharePoint.

An Invalid Destination May Pass Validation

In the Export Root Destination window the “Destination” field expects the SharePoint name even when it is automatically populated with a URL based on the “Root Destination” setting in the “Destination Settings” tab. Upon clicking OK, the location is accepted as valid even though there is no such path in the destination tree. (SPR00095288)

Workaround: In the Export Root Destination window, if the contents of the “Destination” field are invalid, before clicking OK select the correct node in the tree to populate the field with a valid path.

Release Fails if Built-In Comments Column Has a Value

If you attempt to release a document where the document content type has a built-in comments column, and if that comments column contains some value, the release will fail with the following error message: (SPR00095023)

```
Error in document #1, 0 Cannot export document to SharePoint Services.
```

Workaround: None.

Column Name Character Limitation

In Kofax Capture, internal column names are stored in escaped form, which can be especially long if the name contains spaces and/or non-alphanumeric characters.

If the internal column name is too long to store, you will not be able to use the SharePoint column or any content type that contains the column. Saving a setup with the unstorable column will result in an exception, even if the column is unlinked. (SPR00065009)

Workaround: Limit the use of spaces and non-alphanumeric characters in column names.

Documents Can be Exported With Missing Required Data

If a column is required in SharePoint but the linked index field in Kofax Capture is not set to required, then documents can be exported successfully even if the field is blank. (SPR00064930)

Workaround: Make sure that all required columns in SharePoint have the corresponding Kofax Capture fields also set as required.

Deleting and Re-Creating a SharePoint Library May Result in an Error

Deleting and re-creating a SharePoint library after saving export setup data may result in an error. The system may display this message:

The previously selected root destination, <root destination>, is not accessible. The location may no longer exist in SharePoint or you no longer have the appropriate permissions. As a result, the root destination settings will be cleared.

This message appears when you perform the following actions:

- 1 Set up an export connector for Microsoft SharePoint, and specify a root destination.
- 2 Click OK.
- 3 Delete the SharePoint library used by the export connector for the root destination.
- 4 Create a SharePoint library with the same name.
- 5 Re-visit export setup.

This message occurs because each SharePoint library has a unique ID. When you delete and re-create a SharePoint library, a new ID is assigned to the library, which breaks the link between the library and the export connector.

Deleting and Re-Creating a SharePoint Content Type May Result in a Warning

Deleting and re-creating a SharePoint content type after saving export setup data may result in a warning. The system may display this message:

Unable to retrieve the selected content type from the root destination. As a result, all document settings will be cleared.

This message appears when you perform the following actions:

- 1 Set up an export connector for Microsoft SharePoint, and specify a root destination.
- 2 Switch to the Document Settings Tab and select a content type.
- 3 Link all required SharePoint columns.

- 4 Click OK.
- 5 Delete the SharePoint content type used by the export connector.
- 6 Create a SharePoint content type with the same name and columns.
- 7 Re-visit export setup.

This message occurs because each SharePoint content type has a unique ID. When you delete and re-create a SharePoint content type, a new ID is assigned to the content type, which breaks the link between the content type and the export connector.

Deleting and Re-Creating a SharePoint Column May Result in Warnings

Deleting and re-creating a SharePoint column after saving export setup data may result in warnings.

The system may display this message:

One or more columns could not be found in the selected SharePoint content type. The links for these columns will be removed.

This message appears when you perform the following actions:

- 1 Set up an export connector for Microsoft SharePoint, and specify a root destination.
- 2 Switch to the Document Settings tab and select a content type.
- 3 Link at least one non-required SharePoint column and all other required columns.
- 4 Click OK.
- 5 Delete the non-required SharePoint column that is linked in the export connector.
- 6 Create a SharePoint column with the same name.
- 7 Re-visit export setup.

The system may also display the following message:

Please assign a Ascent Capture Value to all required columns.

This message appears when you perform the following actions:

- 1 Set up an export connector for Microsoft SharePoint, and specify a root destination.
- 2 Switch to the Document Settings tab and select a content type that contains at least one required SharePoint column.
- 3 Link all required SharePoint columns.
- 4 Click OK.
- 5 Delete one of the required SharePoint columns linked in the export connector.
- 6 Create a required SharePoint column with the same name.
- 7 Re-visit export setup.

This message occurs because each SharePoint column has a unique ID. When you delete and recreate a SharePoint column, a new ID is assigned to the column, which breaks the link between the column and the export connector.

Export Connector May Transfer Out-of-Range Numeric Data

The Ascent Capture Values columns in the Document Settings tab will accept and transfer a number of any value. Please note that if an associated SharePoint column has a numeric range restriction, the export connector will still transfer the number, even though it may be out of range.

Export May Fail with Missing Attributes Message

The export may fail with the following error message even though all required columns appear to have associated Ascent Capture Values:

One or more required attributes for this document are missing. Please verify that all Ascent Capture Values are correct and try again.

This may be due to an unlinked (non-required) SharePoint column being reconfigured as a required column and then as a hidden column after "Optional" before making it a hidden column. (SPR00029688)

Any Value Can Be Exported to a Choice Column

You can export any value to a Choice column, even if the value doesn't match any of the choice's elements and the column does not allow "fill-in" values. Even though the data is exported, when you edit the document properties, the uploaded value is not available in the choice list for the column.

Invalid Folder Name Characters

SharePoint does not allow the following characters to be used in folder names. (SPR00058350):

- Ampersand (&)
- Asterisk (*)
- Backslash (\)
- Colon (:)
- Forward Slash (/)
- Greater than sign (>)
- Left Bracket ({)
- Less than sign (<)
- Percent (%)
- Pipe (|)
- Pound Sign (#)
- Question mark (?)
- Quotation marks ("")
- Right Bracket (})
- Tilde (~)

Note A folder name can include a period, but cannot begin or end with a period and cannot contain consecutive periods.

Invalid Filename Characters

When the Kofax Capture Export Connector - SharePoint 2007-2010 transfers files to the SharePoint server, and a file name contains invalid characters, the export connector transfers the file, but omits the invalid characters in the file name. The following characters are invalid for file names: (SPR00058350)

- Ampersand (&)
- Asterisk (*)
- Backslash (\)
- Colon (:)
- Forward Slash (/)
- Greater than sign (>)
- Left Bracket (l)
- Less than sign (<)
- Percent (%)
- Pipe (|)
- Pound Sign (#)
- Question mark (?)
- Quotation marks (“ ”)
- Right Bracket (r)
- Tilde (~)

Multiple Lines of Strings

The Kofax Capture Export Connector - SharePoint 2007-2010 currently only supports setting single line values to a SharePoint “Multiple lines of text” column type.

Incorrect Export of Document with One Image and Multiple eDocuments

Under the following conditions, the export connector incorrectly allows a document containing eDocuments to export without error:

- In Export Setup, on the Image Settings tab, select “Kofax PDF” in the “Export Image As” field.
- In Export Setup, on the General Settings tab, select the “Skip the first page of each document” check box.
- In the document, the first page is an image and the subsequent pages are one or more eDocuments.
- During batch processing, bypass the PDF Generator module and export the document.

This document should fail to export because the Kofax Capture has not generated any PDF images.

Export May Succeed with Invalid Credentials

Under the following conditions, export successfully uploads documents to SharePoint even if a user’s password is no longer valid:

- Export is running as a service.
- Export succeeds with valid credentials before the user’s password is changed.

- The user's password is changed.

Root Destination Path not Updated When a Folder is Added Via the Browse Function

If the browse function is used to add a folder, the root destination path is not updated. Note that the correct folder is used during export. (SPR00095150)

Renaming Folder Content Type

If an export connector is saved and then the selected folder content type is subsequently renamed, the folder was created using the default "Folder" content type instead of the selected (renamed) content type. (SPR00064837)

Workaround: Open the export setup and re-save the script, then publish the batch class.

Resolved Problems

The following issues that were reported for a previous version of the product were fixed in this release.

Various SSL Issues

A number of improvements were made in this release that enhances SSL stability and behavior.

Cannot Release to Some Libraries

Attempting to release to certain libraries failed with the following error message if the target document set was renamed. (SPR00094960)

"Export setup has encountered the following unexpected error. Please refer to the Kofax Capture error log for more details. List "<library>" does not exit at site with URL '<url>'"

This export connector now uses the correct URL, even if the document set was renamed.

Custom Content Type Not Retained in SharePoint 2010

In this export connector, if you set a custom content type, the content type is not retained. This is a Microsoft bug that can be resolved in the Microsoft SharePoint Foundation 2010 hotfix package of August 31, 2010. (SPR00094510, SPR00091668)

Content Type Reverts to Default After Removing Folder or Document Set

If the content type has been set to something other than the SharePoint default, the setting will revert to the default if you delete a folder or document element from the Folders and Document Sets panel (in the Destination Settings tab). (SPR00095002)

The first item in the list is now selected if the folder or document element is deleted.

Export May Fail with Access Denied Error

The export may fail even though permissions seem to be set correctly for the root destination:

This has been fixed.

URLs Containing Commas Are Ignored

When you upload a URL that contains commas to a SharePoint Hyperlink/Picture column, the URL was ignored. (SPR00029993)

This has been fixed

Number Column Type and Scientific Notation

No value was set during export for any SharePoint column of type Number for a value in scientific notation, such as 1.0e+20.

This has been fixed. (SPR00030517)

Runtime Error Temporarily Displays When Closing the Administration Module

A runtime error may have temporarily displayed in the following operations:

- Open an existing export connector in export setup.
- Make a change.
- Save and close the export connector.
- Publish the batch class.
- Close the Administration module.

This has been fixed. (PR00032925)

Library Not Found Error

Specifying certain the characters (#, ?, /, or \) in the library name displayed a “Library not found” error. (SPR00058350)

This problem has been fixed.

Additional Resources

The following sections describe related documentation and how to get technical assistance for this export connector.

Related Documentation

Kofax Export Connector – Microsoft SharePoint Administrator's Guide

The *Kofax Export Connector – Microsoft SharePoint Administrator's Guide* contains essential information about installing and configuring the export connector.

This guide is for system administrators and developers who are installing the export connector or who need a description of the installation and configuration procedures and requirements.

Help for Kofax Export Connector – Microsoft SharePoint

Help provides online assistance for system administrators and operators.

Kofax Export Connector – Microsoft SharePoint Release Notes

Late-breaking product information is available from release notes. You should read the release notes carefully, as they contain information that may not be included in other documentation.

Kofax Capture Installation Guide

The *Kofax Capture Installation Guide* contains essential information about installing Kofax Capture and Kofax Capture Network Server (KCN Server).

This guide is for system administrators and developers who are installing Kofax Capture or KCN Server, or who need a description of the installation procedures and requirements.

Kofax Capture Administrator's Guide

The *Kofax Capture Administrator's* contains essential information about setting up batch classes and processing documents with Kofax Capture.

Kofax Capture Developer's Guide

The *Kofax Capture Developer's Guide* provides guidance and instructions for customizing Kofax Capture. Several examples and code segments are provided to demonstrate how to create custom panels, Ribbon tabs, workflow agents, modules, and scripts to enhance Kofax Capture processing.

Help for Kofax Capture

Kofax Capture online Help provides online assistance for system administrators and operators.

Kofax Capture API Reference Guide

The *Kofax Capture API Reference Guide* is an online reference that provides the details of each API library needed to customize Kofax Capture. The *API Reference Guide* is designed to be used with the *Kofax Capture Developer's Guide* as a primary resource for customizing Kofax Capture.

You can access the API Reference Guide from the Kofax Capture program folder on your Windows desktop.

Release Notes

Late-breaking product information is available from release notes. You should read the release notes carefully, as they contain information that may not be included in other Kofax Capture documentation.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax Capture solution. Visit the Kofax Web site at www.kofax.com for complete details about the available training options and schedules.

Getting Help for Kofax Products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Go to <http://www.kofax.com/support> for:

- Access to product knowledge bases
Click **CAPTURE: SUPPORT KNOWLEDGE**.
- Access to the Kofax Customer Portal (for eligible customers)
Click **CAPTURE: SUPPORT INTERACTIONS** and log in.
To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. The guide describes how to access the portal, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.
- Product information and release news
Click **Product** and select a product name and version.
- Downloadable product documentation
Click **Documentation** and select a product name and version.
- Access to support tools
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products
Click **Options** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.