

# **Kofax Export Connector - Microsoft SharePoint**

8.2.0

Administrator's Guide



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# Preface

This guide includes the information you need to successfully install Kofax Export Connector – Microsoft SharePoint and acquaint yourself with the software.

If you downloaded this export connector 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 it as a package that includes electronic media. In this guide, we refer to both the extracted files and the electronic media as the product files.

## 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](http://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.



# Overview

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 or into the SharePoint Online for Office 365 repository.

Please read this guide carefully as it contains information not included in the Kofax Capture documentation.

## Features

This section contains information about features provided with this export connector.

### SharePoint Online for Office 365 Support

The export connector supports exporting documents to SharePoint Online for Office 365.

### Unicode Support

The export connector supports Unicode with Kofax Capture 8 or later.

### Single Sign On

This export connector optionally allows you to take advantage of Windows sign on so that the credentials of the currently logged on Windows user automatically log in to the export connector.

### 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 supports the following file formats / compression formats:

- Multipage TIFF – LZW
- Multipage TIFF – Group 4 Compression
- Multipage TIFF – Group 3 Compression
- Multipage TIFF – Group 3/2D Compression
- Multipage TIFF – Uncompressed Image Format
- Multipage TIFF – JPEG Compression
- Kofax PDF

### Kofax PDF Support

With this export connector, you can export Kofax PDF documents into the Microsoft SharePoint repository. Kofax PDF is bundled with Kofax Capture and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:

- Kofax PDF Image Only
- Kofax PDF Image + Text

### eDocument Support

With this export connector, you do not need to limit your batches to image files. eDocuments are supported for export into the Microsoft SharePoint repository. All the documents you want in a batch can be processed together, regardless of file type.

For more information about eDocument files, refer to the Kofax Capture documentation.

### OCR Full Text Support

With this export connector, you can export documents processed through the Kofax Capture OCR Full Text module into the Microsoft SharePoint repository.

## Create Custom Export Connector Scenarios

You can set up multiple export scenarios, each with unique settings and save them under a unique name. This allows you to quickly and easily retrieve any of your export scenarios and use them without re-entering destination folders and other settings.

## Specify Storage Location for Exported Documents

This export connector allows you to specify where in SharePoint you would like to store your exported documents. To do so, on the Destination tab, specify a library path and optional folder destination. When defining a folder, you can specify a folder content type, which allows you to link index fields, Kofax Capture values, or static text to specific SharePoint columns of the folder.

## Assign Kofax Capture to Document Attributes (SharePoint columns)

This export connector allows you to link Kofax Capture Values to SharePoint columns. This makes it possible to dynamically populate SharePoint with meaningful metadata as you

export documents. You can first select a SharePoint content type which displays its associated SharePoint columns. Then, link Kofax Capture Values with each column. When defining a value, you can concatenate static text, index fields, and Kofax Capture Values. During export, it automatically associates metadata with each document exported to a SharePoint library.

## Specify Whether to Prompt for Credentials if Authentication Fails During Export

If an export connector is unable to log on to SharePoint at export time, you can cause the script to prompt again for a valid user name and password. If the user enters valid login data, document export continues successfully. However, if the user provides invalid credentials or clicks Cancel, no documents are exported and the batch routes to the Quality Control module.

If you do not select this option and the export connector is unable to log on to SharePoint, the script does not prompt to re-enter valid login data and is not able to successfully export documents.

## eDocument Original File Name Retention

This export connector supports Kofax Capture original file name retention for eDocuments. To retain original filenames of eDocuments:

- Set the `SupportsOriginalFileName` property to `True` (`SupportsOriginalFileName=True`) in the export connector `Kofax.SharePoint.Export.inf` file, when the export connector is first registered. `Kofax.SharePoint.Export.inf` is located in the folder where you installed the export connector (for example, `C:\Program Files\Kofax\Capture\CAP\Kofax.SharePoint.8\Kofax.SharePoint.Export.inf`). `True` is the default setting, and the `SupportsOriginalFileName` property is not case-sensitive.
- Select the “Use the original file name of image and eDocument files” option on the Kofax Capture window in the Kofax Capture Export module queue properties.

When these two options are set as described, documents exported as eDocument files retain their original file names. If a document is exported with the `SupportsOriginalFileName` property set to `False`, eDocument file names are based on the Document Name attribute linked in export setup.

---

**Note** OCR full text files, imported TIFF files and Kofax PDF documents exported from Kofax Capture always use the Kofax Value linked to the Document Name, regardless of the configuration.

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## Help Available for Export Setup

Help is installed with your export connector. It is available from the Administration module when you are setting up your export connector. To display Help information, click Help from the Export Setup window.



## Additional Information

This section contains additional information about this export connector.

### “Forms” Name Not Supported

This export connector does not support using “forms” as the document name or folder name. The “forms” name is reserved on Microsoft SharePoint Server.

### File Names and Extensions of Exported Documents

The export connector automatically appends a file extension of .TIF or .PDF to exported documents depending on which image type that you select. If the Name column's value contains an unexpected file name extension, the resulting file name will contain two extensions.

#### Examples

Selected image type	Value of the document's Name column	Resulting file name
Multipage TIFF	myfile	myfile.TIF
Multipage TIFF	myfile.tif	myfile.TIF
Multipage TIFF	myfile.pdf	myfile.pdf.TIF
Kofax PDF	myfile	myfile.PDF
Kofax PDF	myfile.pdf	myfile.PDF
Kofax PDF	myfile.tif	myfile.tif.PDF

### OCR File Naming

OCR Full Text files use the following file naming convention:

```
<KofaxValue>_OCR.<extension>
```

### Setting Kofax PDF Options

To export Kofax PDF documents, add the PDF Generator module to your applicable batch class, enable PDF generation in your applicable document class, and select Kofax PDF as the export image type on the export connector Image Settings tab.

For details about how Kofax PDF documents and non-image files are exported to SharePoint, see the Help.

### Adding the PDF Generator Module to a Batch Class

- 1 From the Create Batch Class window or Batch Class Properties window, click the **Queues** tab.
- 2 Select **PDF Generator** from the list of Available Queues, and click **Add**.
- 3 Click **Apply** to save your settings without closing the window.
- 4 Click **OK** to save your settings and close the window.

### Enabling Kofax PDF Generation for a Document Class

- 1 From the Create Document Class window or Document Class Properties window, select the **PDF** tab.
- 2 Select **Enable Kofax PDF generation** to enable Kofax PDF processing for the document class.
- 3 Click **Apply** to save your settings without closing the window.
- 4 Click **OK** to save your settings and close the window.

### Selecting Kofax PDF as the Export Image Type

- 1 From the export connector setup, select the **Image Settings** tab.
- 2 In the Export Image As field, select **Kofax PDF**.
- 3 Click **Apply** to save your settings without closing the window.
- 4 Click **OK** to save your settings and close the window.

## Setting OCR Full Text Options

To export OCR full text files, you must select the “Export OCR full text file with document” option on the Export Setup Image Settings tab. In addition, you must select “Enable OCR full text” in the applicable Document Class Properties OCR tab and add the OCR Full Text module to the applicable batch class.

### Selecting OCR Full Text Processing for a Document Class

- 1 From the Create Document Class window or Document Class Properties window, click the **OCR** tab.
- 2 Select **Enable OCR full text** to enable OCR full text processing for the document class.
- 3 Click **Apply** to save your settings without closing the window.
- 4 Click **OK** to save your settings and close the window.

### Adding the OCR Full Text Module to a Batch Class

- 1 From the Create Batch Class window or Batch Class Properties window, click the **Queues** tab.
- 2 Select **OCR Full Text** from the list of Available Queues, and click **Add**.
- 3 Click **Apply** to save your settings without closing the window.
- 4 Click **OK** to save your settings and close the window.

## Skip First Page

Use the “Skip first page of each document” option on the General Settings tab to discard the first page of each document from the image. You may want to do this if you are using standalone separator sheets to separate your documents. However, if you are exporting only one image in a document and you select this option, export will fail and the document will be routed to the Kofax Capture Quality Control module.

## Multiple Document Naming

When multiple documents are spawned by a single document in Kofax Capture, the export connector typically gives them each a file name that ties them to the original document. You can use another file naming scheme when you export eDocuments by checking the “Use the original file name of image and eDocument files” option in the Export Properties window.

The following table shows an example of using both schemes. Given the following document (Document 1), the export connector creates files as shown in the table below.

Note that the export connector combines the original TIFF images into a single multipage file. The top row displays the results if they are kept as TIFF files. The bottom row displays the results if they are converted to Kofax PDF files. The original PDF, XML, and TXT documents are all imported as eDocuments.

Document 1:

Page 1: LilisDocument.XML

Page 2: <unnamed> TIF (scanned page)

Page 3: TestingNamedImage.TIF

Page 4: UnitTesting.PDF

Page 5: SuperDocument.TXT

Page 6: <unnamed> TIF (scanned page)

Page 7: Secondbyearly.TIF

Output Type	Retaining Original File Name	Not Retaining Original File Name
Multi-page Image Type	<KofaxValue>.TIF (Pages 2, 3, 6, 7) LilisDocument.XML (Page 1) UnitTesting.PDF (Page 4) SuperDocument.TXT (Page 5)	<KofaxValue>.TIF (Pages 2, 3, 6, 7) <KofaxValue>_1.XML (Page 1) <KofaxValue>_2.PDF (Page 4) <KofaxValue>_3.TXT (Page 5)
Kofax PDF	<KofaxValue>.PDF (Pages 2, 3, 6, 7) LilisDocument.XML (Page 1) UnitTesting.PDF (Page 4)	<KofaxValue>.PDF (Pages 2, 3, 6, 7) <KofaxValue>_1.XML (Page 1)

Output Type	Retaining Original File Name	Not Retaining Original File Name
	SuperDocument.TXT (Page 5)	<KofaxValue>_2.PDF (Page 4) <KofaxValue>_3.TXT (Page 5)

## Export Working Folder

You must specify an export working folder to be used to temporarily store exported images.

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**Note** You should specify an export working folder that is writable by all users.

---

Default export working folder:

```
<Drive>:\Documents and Settings\All Users\Application Data\Kofax\
```

At export, if you specified an export working folder other than the default, documents are exported here:

```
<specified export working folder>\
```

If the export working folder has been deleted and you run the export connector, it is automatically created. After the file transfer is complete, all temporary files and folders are automatically deleted from the export folder.

If the default export working folder does not exist when you publish your batch class, the following warning may appear:

```
The directory [<Drive>:\Documents and Settings\All Users\Application Data\Kofax\] cannot be used as the image export directory for document class <document class that contains the SharePoint export connector> because it failed with [The system cannot find the path specified.] when attempting to access it.
```

Because the export connector creates this folder, you can safely ignore this warning message.

## Setting Up Multiple Instance Support

Use the Multiple Instance Support feature to run multiple instances of any Kofax Capture service on a single computer.

---

**Note** When multiple services of the same kind are run on the same computer, a single Concurrent station and Enterprise license are required. For example, in this case, a user would need both an Enterprise license and a single Concurrent station license to run multiple instances of the Export module.

---

To use the Multiple Instance Support feature with an export connector certified with Kofax Capture, you will need to modify the export connector's .inf file. The .inf file is located in your Kofax Capture installation folder.

- 1 Locate the .inf file in your export connector installation directory. Make a copy of the file for backup purposes, and store the copy in a safe location.

- 2 Right-click the .inf file.  
A context menu appears.
- 3 From the context menu, select **Open With**. Use any text editor to edit this file.
- 4 Add the following to the .inf file: `SupportsMultipleInstances=True`  
Note that you can add this line anywhere within the custom module's parameter section.
- 5 When you are finished, save the file.
- 6 You need to re-register your export connector with Kofax Capture.
  - a Start the Kofax Capture Administration module.
  - b On the Tools tab, in the System group, click **Export Connectors**.  
The Export Connector Manager window appears.
  - c On the Export Connector Manager window, click **Add**.
  - d Browse to the modified export connector .inf file. Select the file and click **Open**.  
The Add Export Connectors window appears.
  - e On the Add Export Connectors window, select the export connector and click **Install**.
  - f Close all windows to complete the process.

## Modifying the Source Code

The source code for this export connector is provided and it is located in the product files. The source code can be opened, edited, and compiled in Microsoft Visual Studio.

---

**Note** To successfully modify and compile the export connector, development must occur on a workstation with the appropriate versions of Kofax Capture and TAPCommon previously installed. To use the modified export connector, you must replace the export connector `Kofax.SharePoint.Connector.dll` with the modified version on the client workstation. If you receive an access denied error, you will need to close the Administration module. Refer to the documentation that came with your Microsoft SharePoint product and Microsoft Visual Studio documentation for assistance.

---

- 1 Install the export connector. Refer to [Installing Kofax Export Connector – Microsoft SharePoint](#) on page 19 for the installation instructions. When you install the Kofax Export Connector – Microsoft SharePoint export connector, you will install the required components referenced in the source code.

---

**Note** If the export connector was not installed to the default folder, there will be errors related to TAPCommon references when you attempt to compile the source code. To fix these errors, update the TAPCommon reference paths in Microsoft Visual Studio to reference their correct locations in the non-default installation folder.

---

- 2 Open, make any desired modifications, and compile the source code in Microsoft Visual Studio.
- 3 Copy the `Kofax.SharePoint.Connector.dll` to the installation folder. When you are prompted to replace the existing file, select **Yes**. You will need to repeat this procedure on each Administration and Export workstation that will use the export connector.

## System Requirements

The server and client workstations used for this export connector must meet the system requirements listed on the Kofax Web site. For information about supported operating systems and other system requirements, visit the Support pages on the Kofax Web site at [www.kofax.com](http://www.kofax.com).

# Installing Kofax Export Connector – Microsoft SharePoint

You can install this export connector on a Kofax Capture client workstation or standalone workstation.

To install the export connector, you must have Windows administrator privileges. If you do not have administrator privileges and install this export connector, you may receive error messages and several of the files may not install correctly. During installation you will need your SharePoint login information.

Before you install, see [System Requirements](#) on page 18.

## Installing the Export Connector

- 1 If you have installed an earlier version of the export connector, uninstall it now. It is not possible to install this export connector on top of an earlier version.
- 2 Start the installation by running `Setup.exe` from the location to which you downloaded it. If you are running the installation from removable media, the installation should automatically start.
- 3 Follow the instructions on the screen to install the export connector.
- 4 When the installation is complete, a confirmation message appears.

---

**Note** Installing the export connector automatically registers it with Kofax Capture.

---

- 5 Repeat this procedure on all Administration and Export workstations that will use this export connector.

## Maintaining the Export Connector

This section describes how to repair (replace missing, renamed, or deleted files) and remove the export connector.

### Repairing the Export Connector

- 1 From the Windows task bar, select Start | Run and run <path to installation executable>`Setup.exe`. If you are running the installation from removable media, the installation should automatically start.
- 2 Setup will detect an existing installation.  
The Application Maintenance window appears.
- 3 From the Application Maintenance window, select **Repair** and then click **Next**.
- 4 Follow the instructions on the screen to repair the export connector.

When the repair is complete, a confirmation message appears.

## Removing the Export Connector

Alternatively, you can use the Add or Remove Programs utility from the Windows Control Panel to uninstall.

- 1 From the Windows task bar, select Start | Run and run <path to installation executable>Setup.exe. If you are running the installation from removable media, the installation should automatically start.
- 2 Setup will detect an existing installation.  
The Application Maintenance window appears.
- 3 From the Application Maintenance window, select **Remove** and then click **Next**.
- 4 Follow the instructions on the screen to delete the export connector.  
When the uninstallation is complete, a confirmation message appears.

---

**Note** After removal, “Kofax Export Connector – Microsoft SharePoint” will continue to display in the Export Connector Manager, although it will not be functional. To remove the export connector from the list, you must go into every batch class and associated document class, select the applicable export connector from the Assigned Export Connectors list and click **Remove**. You must do this for every instance of Kofax Export Connector – Microsoft SharePoint. After all references to the export connector are removed, you will be able to delete Kofax Export Connector – Microsoft SharePoint from the Export Connector Manager.

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## Logging On To Microsoft SharePoint

Once you have associated a document class with a batch class in Kofax Capture, you may specify the export connector to use when exporting your images, OCR full text files, Kofax PDF documents, eDocuments, and index data.

- 1 Start the Kofax Capture Administration module.
- 2 Select the Batch Class tab from the Definitions panel, and right-click the applicable document class. (Expand the batch class item to select associated document classes.)  
A context menu appears.
- 3 From the context menu, select **Export Connectors**.  
The Export Connectors window appears.
- 4 The Export Connectors window lists all available export connectors. Available export connectors are those that are registered with Kofax Capture. From the Export Connectors window, select this export connector and click **Add**.  
The Microsoft SharePoint Login Information window appears.
- 5 If you don't want to take advantage of single sign on, enter your custom credentials.  
Note that the domain name property is only used when a different Microsoft SharePoint domain is needed.
- 6 Enter a fully qualified domain name for the Site URL. If you are using SharePoint Online for Office 365 specify your hosted SharePoint instance for SharePoint Online. For more information, see your system administrator.

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**Note** The login information is saved and used during export.

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- 7** To prompt for a user name and password if the export connector is not able to log on to Microsoft SharePoint at export time, select the **If unable to login during export, prompt for valid login information** check box.
- If selected and there is a problem logging on, the Microsoft SharePoint Login Information window appears during export. The user may then enter a valid user name and password, and click OK. However, if the user clicks Cancel, the export fails and the batch is routed to the Kofax Capture Quality Control module.
  - If not selected and problems occur when logging on to Microsoft SharePoint, the Microsoft SharePoint Login Information window does not display during export. Export fails and the batch is routed to the Kofax Capture Quality Control module.

---

**Note** Do not select this feature if you plan to run the Kofax Capture Export module as a service or if you plan to run this module during off-hours. The Microsoft SharePoint Login Information window requires a user response, which interferes with the automated nature of running the Export module as a service or without operator attention.

---

- 8** Click **OK**.  
Refer to [Setup Options](#) on page 21 for information about the setup options.

## Setup Options

The following sections describe the setup options available with this export connector.

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**Note** For more details about the setup options, refer to the Help.

---

Location	Description
Destination Settings Tab	Specifies the root destination and an optional folder destination to be used for export. Specifies a SharePoint folder content type which displays its associated SharePoint columns. You can link index fields, Kofax Capture Values, or static text to specific SharePoint columns of the folder.
Export Root Destination Window	Specifies a SharePoint destination.
Document Settings Tab	Specifies a SharePoint content type which displays its associated SharePoint columns. This tab also allows you to link Kofax Capture Values with SharePoint columns. If a content type has required columns that are linked to unsupported data types, it is not displayed in the list of available content types. For more information, see the Help.
Image Settings Tab	Specifies an image format for your exported images, and specify whether to export OCR full text files with your document.
General Settings Tab	Specifies an export working folder as the temporary storage location to be used at

Location	Description
	export time, and to specify whether to skip the first page of each document.
Browse For Folder Window	Specifies an export working folder to be used to temporarily store exported images. You can select an existing folder or create a new one.

### Additional Configuration Options

You can configure some additional options by using an XML that file allows you to set the number of retries and the timeout interval to compensate for poor or intermittent network connections. To do this you must manually create the XML file as follows:

```
<?xml version="1.0" standalone="yes"?>
<Config>
  <RequestTimeoutSeconds>180</RequestTimeoutSeconds>
  <MaxRetries>5</MaxRetries>
  < WriteRepositoryId>true</WriteRepositoryId>
</Config>
```

All parameters are optional and have internal default values. Following is the description of each value:

Parameter	Description	Default Value
RequestTimeoutSeconds	Timeout in seconds for each request sent to the SP server.	Infinite
MaxRetries	Number of retries for failed network operations.	3
WriteRepositoryId	<p>Boolean flag to set whether the CMIS Object ID should be written to the "Repository Document ID" index field. Values can be "true" or "false" (without quotes).</p> <hr/> <p><b>Note</b> Regardless of this value, the Repository Document ID can only be written if CMIS is installed and activated on the SharePoint 2010 site.</p> <hr/>	true

The config XML file can be placed in any of these two paths (if both exist, the first one takes precedence):

- 1 %APPDATA%\Kofax\KEC-SharePoint\Config.xml
- 2 <KCServerPath>\Config\KEC-SharePoint.xml