

# **Kofax Copitrak**

## **SharePoint Connector Installation and Configuration Guide**

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**KOFAX**

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# Preface

This guide provides instructions for administrators who are responsible for installing and using Kofax Copitrak SharePoint Connector. Use this guide to get started with the software and become familiar with the product features.

## System requirements

System requirements are listed in the *Technical Specifications* document, which is available from the [Kofax Copitrak Product Documentation](#) site. The document is updated regularly, and we recommend that you review it carefully before installing your product.

## Related documentation


Product documentation for Kofax Copitrak 3.4.0 is available here:

<https://docshield.kofax.com/Portal/Products/Copitrak/3.4.0-csb5nx1k32/Copitrak.htm>

## Getting help with Kofax products

The [Kofax Knowledge Portal](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to <https://knowledge.kofax.com>.

 The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal provides:

- Powerful search capabilities to help you quickly locate the information you need.  
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.  
To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).  
On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).  
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).  
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.  
Go to the [Support Details](#) page and select the appropriate article.

## Chapter 1

# Prerequisites

The Kofax Copitrak SharePoint Connector is used to communicate with the SharePoint server. The SharePoint server can be a cloud server or a local server hosted on a Windows machine.

**i** Use SharePoint Connector only for work with the on-premise SharePoint. To profile documents to SharePoint in the cloud, use Kofax Copitrak OneDrive Connector instead.

Before starting with the installation and configuration, confirm the following information:

1. SharePoint server URL such as *https://mytenant.sharepoint.com*.
2. Copitrak CSS Server 3.3.0 or above is required.

## Chapter 2

# Components and common settings

Kofax Copitrak SharePoint Connector consists of the following primary components:

- SharePointHelper.dll - Provides read access to SharePoint DMS.
- DMSPlugin.dll - Loads SharePointHelper.dll.config into LcWinService.exe in the context of a session in which a user browses DMS folders.
- SharePointTools.exe - Uploads scanned documents to a DMS folder and sends upload notification emails.

Both SharePointHelper.dll and SharePointTools.exe are governed by the following configuration files which are further detailed in the subsequent sections of this document:

- %programdata%\Kofax\Copitrak\Config\CommonSettings.config - Provides a common place to configure global settings for Token Vault and logging.  
See [Configure Token Vault for use with SharePoint Connector](#) for further details about Token Vault.
- %programdata%\Kofax\Copitrak\Config\SharePointCommonSettings.config - Provides a common place for SharePoint specific settings.

## Chapter 3

# Kofax Copitrak SharePoint logs

The %programdata%\Kofax\Copitrak\Config\CommonSettings.config file contains settings for logging by DotNet assemblies that reference it.

Copitrak SharePoint produces the following log files:

- ERS\LogFiles\lcwin\LcWinDotNet.log - Contains log messages from all DotNet assemblies running within LcWinService.exe, including SharePointHelper.dll, DMSPlugin.dll and LCWIN\_NET\_EXT.dll. Log settings are configured in CommonSettings.config.
- ERS\LogFiles\DMS\SharePointTools.log - Contains log messages from SharePointTools.exe. Log settings are configured in CommonSettings.config.
- C:\ERS\WINERS\debug\smtp\




## Chapter 4

# Kofax Copitrak SharePoint Configuration

Before configuration, note that Kofax Copitrak SharePoint Connector requires Copitrak CSS Server 3.3.0 or above.

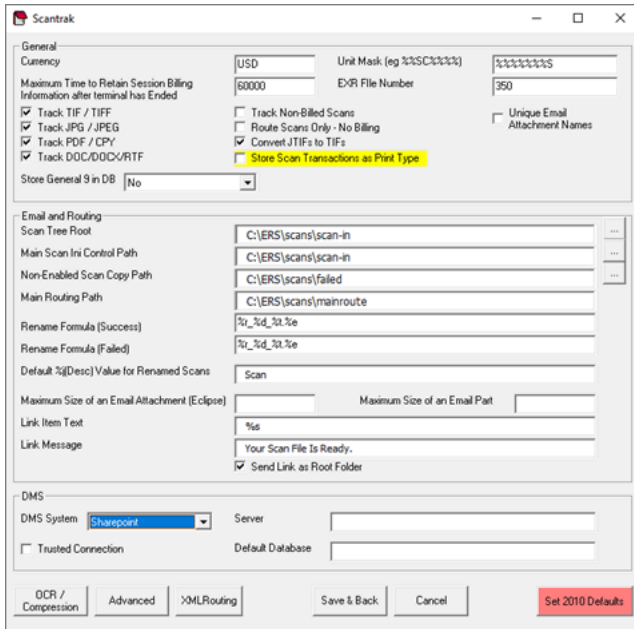
## Login methods

In order to log in, the user's network user name must be added to the ERS configuration under the user's NetworkId2 profile. For on-premise SharePoint, the password is then prompted in the Eclipse/Edge user login workflow. For cloud SharePoint on Microsoft 365, the user must authenticate via TokenVault before invoking Eclipse/Edge. See [Configure Token Vault for use with SharePoint Connector](#) for details.

 If scanned documents are to be stored in SharePoint on behalf of individual users (using their own credentials), each user must provide their credentials by following the link to the authorization page provided to them by their administrator.

## Configure the DMS server

1. Open Config File Manager.
2. Press the **Scantrak** button.  
The **Scantrak** configuration page appears.



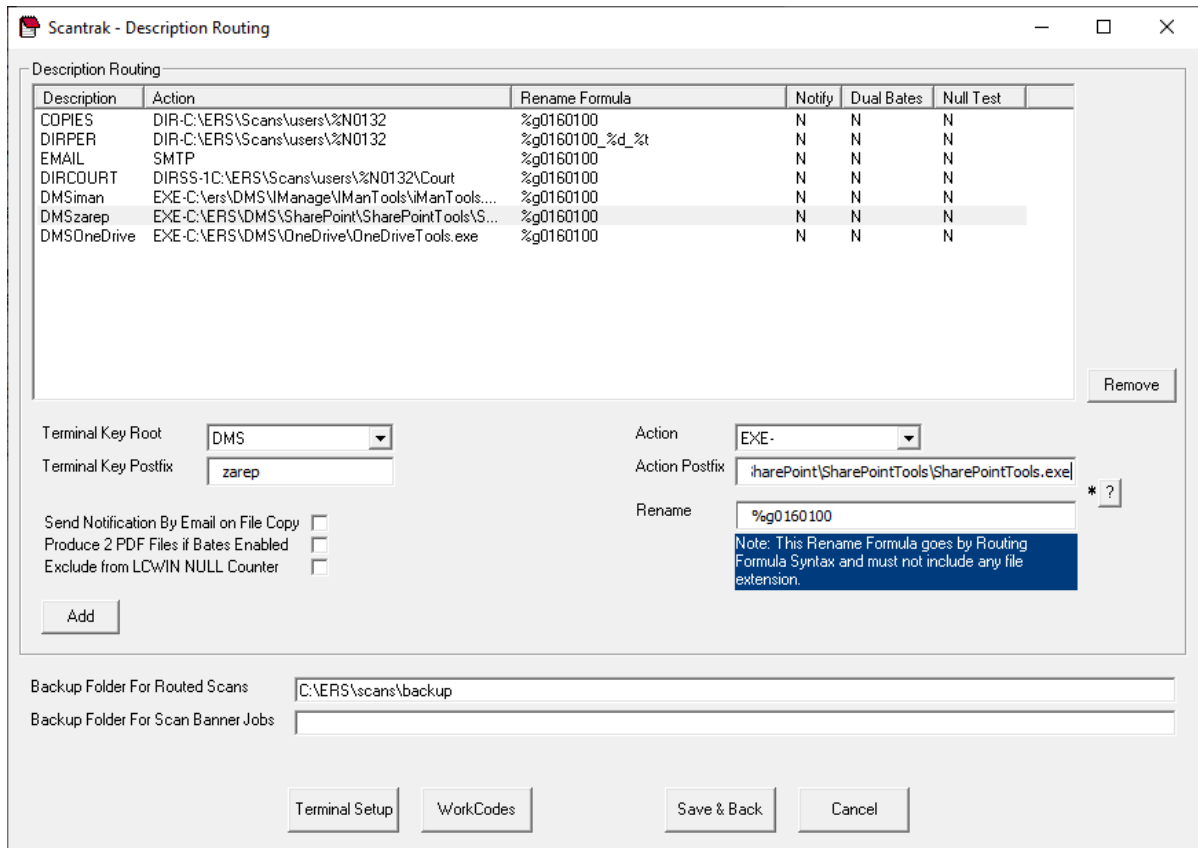
3. Under the **DMS** section, in the **DMS System** drop-down menu, select **SharePoint**.
4. Optionally enter a SharePoint site into the **Default Database** field.  
This field is required only when you are not prompted for the site at the Eclipse terminal.

**i** If no default database is specified and SharePoint server has multiple sites, you are prompted to select a site in the Eclipse/Edge workflow.

5. Leave **Server** field blank.
6. Open the SharePointCommonSettings.config file from the %programdata%\Kofax\Copitrak\Conf\ folder with Notepad or any other text editor.
7. Modify the server value in the configuration file (SharePointCommonSettings.config):  
In section **appSettings**, type `<add key="Server" value="your_SharePoint_server_url" />`.
8. Save and close the configuration file.

## Configure the DMS Route in Scantrak

1. Open Config File Manager.
2. Press the **Scantrak** button.
3. Press the **XML Routing** button.  
The **Scantrak - Description Routing** page appears.



4. Add a route.

Typically, DMS is used for the description.

Action is EXE-"C:\ERS\DMS\SharePoint\SharePointTools\SharePointTools.exe". The drive letter must correspond to your setup.

5. Choose a **Terminal Key Root** of **DMS** if no password prompt is desired in Edge, or **DMSS** if a password prompt is required.

6. Enter a descriptive **Terminal Key Postfix** such as CloudSharePoint.

Copitrak saves the Root and Postfix concatenated together as in **DMSSCloudSharePoint**.

**i** Do not begin your Postfix with letters "S" or "s" to avoid causing an undesired password prompt. For example: Postfix "SharePoint" yields **DMSSSharePoint**.

## Configure the DMS Route Prompts on Eclipse

1. Open Config File Manager.
2. Press the **Terminal/User Options** button.
3. Expand the default User group.
4. Set **General1PickXX** to value "1".

5. Set **General1Pick0** to value "DMS%%Scan to SharePoint".
6. Click **Close**.
7. Press the **Scantrak** button.
8. Click **XML Routing**.
9. Press the **Terminal Setup** button.
10. Select **DMS** for Active Route.
11. Select the appropriate Terminal group, User group, and Language group.

Scantrak Routing Terminal Configuration

Active Route: DMSzrep  Do Not Clear Fields

Route Friendly Name (Terminal): SharePointPaul2

Select the Groups to Apply Changes. Highlight the group on which to base current settings.

Available Terminal Groups: [Empty] Selected Terminal Groups: REGULAR

Available User Groups: [Empty] Selected User Groups: ADMIN, REGULAR

Available Language: [Empty] Selected Language Groups: ENGLISH

Set Route Defaults

General 2 - 4 | General 5-7 | General 8-10 | General 11-13 | General 14-16 | Additional Options

General2

Pick List Source	Pick List Title	Validation	Mask	Default
.	File Type	Default	.	.

Prompt: .  
Reject: .  
No Results: .

General3

Pick List Source	Pick List Title	Validation	Mask	Default
1	Site	PickList	.	.

Prompt: .  
Reject: .  
No Results: .

General4

Pick List Source	Pick List Title	Validation	Mask	Default
2	Library	PickList	.	.

Prompt: .  
Reject: .  
No Results: .

Save & Back Cancel

Scantrak Routing Terminal Configuration

Active Route: DMSzarep  Do Not Clear Fields

Route Friendly Name (Terminal): SharePointPaul2

Select the Groups to Apply Changes. Highlight the group on which to base current settings

Set Route Defaults

General 2 - 4 | **General 5-7** | General 8-10 | General 11-13 | General 14-16 | Additional Options

**General5**

Pick List Source	Pick List Title	Validation	Mask	Default
3-1	Folder	PickList	.	.

Prompt: Select folder

Reject: .

No Results: No Folder

**General6**

Pick List Source	Pick List Title	Validation	Mask	Default
3-3	SubFolder	PickList	.	.

Prompt: Select Subfolder

Reject: .

No Results: No Subfolder

**General7**

Pick List Source	Pick List Title	Validation	Mask	Default
.	title	Open	.	defitle

Prompt: enter title

Reject: .

No Results: .

Available Terminal Groups | Selected Terminal Groups: REGULAR

Available User Groups | Selected User Groups: ADMIN, REGULAR

Available Language | Selected Language Groups: ENGLISH

Save & Back | Cancel

Scantrak Routing Terminal Configuration

Active Route: DMSzarep  Do Not Clear Fields

Route Friendly Name (Terminal): SharePointPaul2

Select the Groups to Apply Changes. Highlight the group on which to base current settings

Set Route Defaults

Available Terminal Groups | Selected Terminal Groups: REGULAR

Available User Groups | Selected User Groups: ADMIN, REGULAR

Available Language | Selected Language Groups: ENGLISH

General 2 - 4 | General 5-7 | General 8-10 | General 11-13 | General 14-16 | Additional Options

General8

Pick List Source	Pick List Title	Validation	Mask	Default
X		Default	.	.
Prompt: .				
Reject: .				
No Results: .				

General9

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.
Prompt: .				
Reject: .				
No Results: .				

General10

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.
Prompt: .				
Reject: .				
No Results: .				

Save & Back | Cancel

Scantrak Routing Terminal Configuration

Active Route: DMSzarep  Do Not Clear Fields

Route Friendly Name (Terminal): SharePointPaul2

Select the Groups to Apply Changes. Highlight the group on which to base current settings

Set Route Defaults

Available Terminal Groups: [Empty]

Selected Terminal Groups: REGULAR

Available User Groups: [Empty]

Selected User Groups: ADMIN, REGULAR

Available Language: [Empty]

Selected Language Groups: ENGLISH

General 2 - 4 | General 5-7 | General 8-10 | **General 11-13** | General 14-16 | Additional Options

General11

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.

Prompt: .

Reject: .

No Results: .

General12

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.

Prompt: .

Reject: .

No Results: .

General13

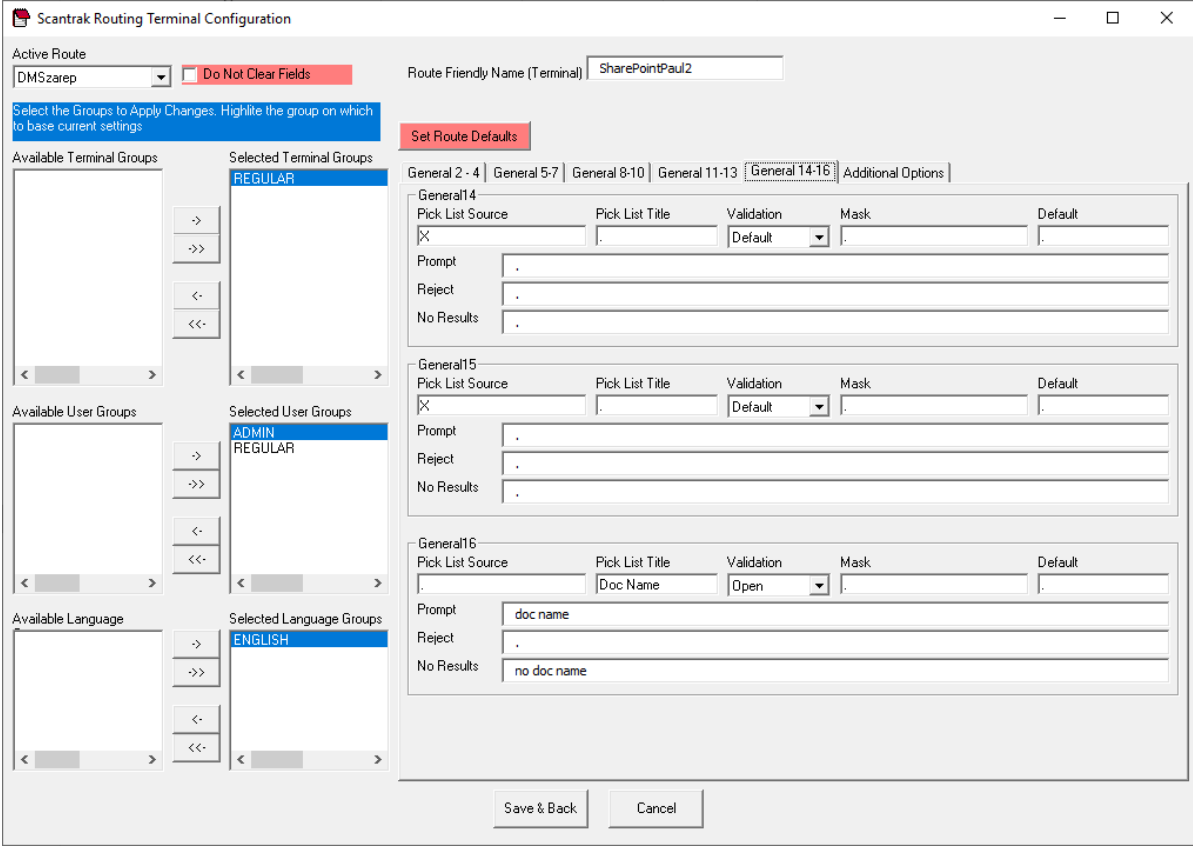
Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.

Prompt: .

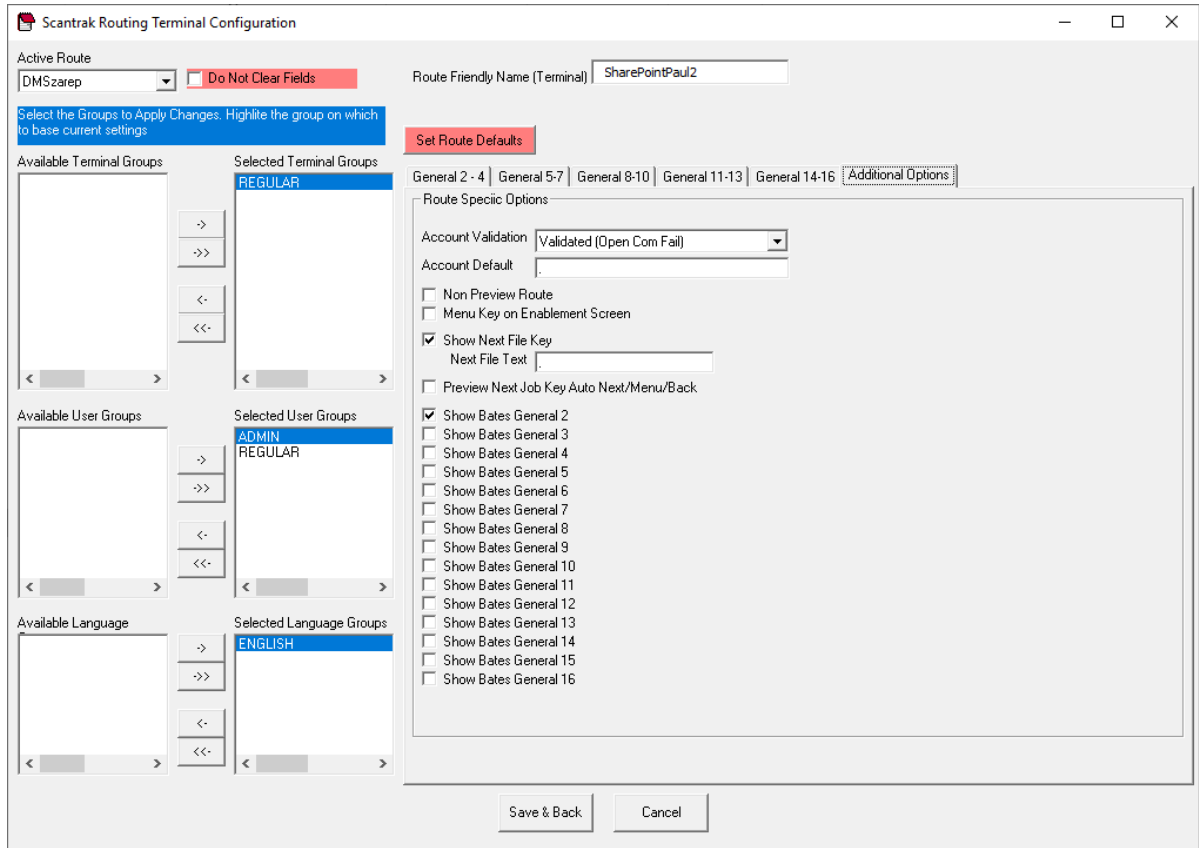
Reject: .

No Results: .

Save & Back Cancel







12. Make changes based on the selected mode.

Picklist Source	Description
!1	Site Selection. Returns a list of available sites on the server selected.
!2	Document Library Selection. Returns all available libraries under the selected site.
!3-1	Folder Selection. Returns all root folders within a library.
!3-3	Search from Root folder selected in previous general field (!3-1). This prompt only displays subfolders within the Root folders. It also allows the user to drill down to any folder within the tree. Prompt is reused to display the new folders within the previous selected folder.

## Configure SharePointCommonSettings.config

1. Open SharePointCommonSettings.config file from the %programdata%\Kofax\Copitrak\Config \ folder.
2. Edit all values to reflect the corresponding General Field values from below.

```
<appSettings>
<add key="TokenVaultSharePointProviderId" value="bbbbbbbbb-bbbb-bbbb-bbbb-
bbbbbbbbbbbb" />
<add key="Server" value="https://mytenant.sharepoint.com"/>
<add key="FieldTitle" value="{GENERAL7}"/>
<add key="WorkFolder" value="GENERAL6" />
<add key="ClientMatterSplitter" value="-"/>
<add key="Client" value="Client"/>
<add key="Matter" value="Matter"/>
<add key="ClientCode" value="true" />
<add key="SmtEnabled" value="false" />
<add key="SubjectSuccess" value="Your document ({doctitle}) scan succeeded!" />
<add key="SubjectFailure" value="Your document ({doctitle}) scan failed!" />
</appSettings>
```

SharePoint folder **Field** can be populated for each uploaded document. By default, SharePoint folders have a **Title** field.

SharePoint enables you to configure further custom fields for your folders. You can add AppSettings prefixed by the word "Field" to indicate how to populate fields.

For example:

key="FieldTitle" value="{GENERAL7}" - Where {General7} is taken from the user input for which prompting is configured in **Config File Manager > ScanTrak**.

key="FieldMatter" value="{MATTER}" - All {substitutionVariables} map case sensitively to elements written to C:\ers\Scans\mainroute\<unitid>\<jobguid>\<scannedDocName>.xml.

key="FieldCopitrakUser" value="{NAME}({NETWORK\_ID})" - Where {NAME} and {NETWORK\_ID} are the Copitrak user name and NetworkId2 respectively, for example: Jane Doe(acme.com\jane.doe).

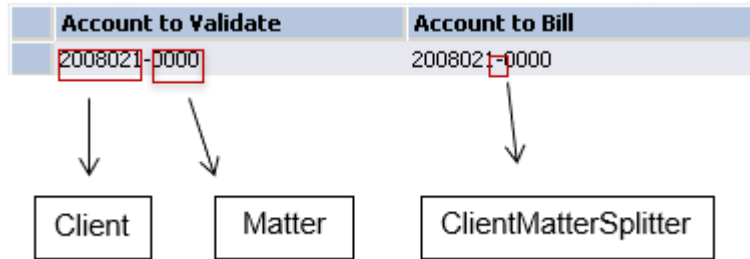
3. Save the file after making changes.

## Configure the Client-Matter Formula

1. Verify the current client-matter structure in ERS.

Account to Validate	Account to Bill
2008021-0000	2008021-0000

2. Open SharePointCommonSettings.config and modify the Client Matter formula as needed.



Example configuration:

If you have the following fields in SharePoint:

- Client=2008021
- Matter=2008021-0000

Configure file values as the following:

```

<add key="Client" value="Client" />
<add key="Matter" value="Client+ClientMattersplitter+Matter" />
<add key="ClientMattersplitter" value="-" />
  
```

## Configure Token Vault for use with SharePoint Connector

Token Vault is available to create possible workflows where user credentials are required but there is no prompt for credentials, such as scan workflows initiated from the embedded clients and completed by the CSS server.

### Register a new authorization provider for Microsoft 365 in Token Vault

Before configuring Token Vault with Kofax Copitrak SharePoint Connector, make sure that you complete the Token Vault installation properly. After installing and configuring TokenVault, the following must be fulfilled on that system:

- You imported all certificates used or generated by TokenVault into the Personal certificate stores.
- You imported the Root CA certificate used or generated by TokenVault into the Trusted Root Certificate Authorities certificate stores.
- Those certificate stores are accessible to the TokenVault service. For more details, see the [Kofax Token Vault Installation Guide](#).

1. In your browser's address bar, open Token Vault manually by entering the Fully Qualified Domain Name of the computer where Token Vault is deployed along with the HTTPS port number.

For example, *https://computername.mydomain.com:8381/*.

The **Token Vault Login** page appears.

2. Log in to Token Vault with your Windows user name and password.

The **Token Vault Configuration** page appears.

3. Select the **Manage authorization providers** tab.

The **Manage authorization providers** page appears.

4. Click **Register new**.

The **Select cloud provider** page appears.

5. Select **Microsoft 365** in the list.

The **New Microsoft 365 authorization provider** page appears.

6. Verify that the **Redirect URL** in this page is added to the **Redirect URLs** in your Microsoft 365 application by doing the following.
  - a. Go to *https://portal.azure.com*.
  - b. Navigate to **App registrations > Owned applications**, select the application created for Copitrak.
  - c. Navigate to **Authentication > Web**, and click **Add URL**.
  - d. Copy the **Redirect URL** in the **New Microsoft 365 authorization provider** page to the new **Redirect URL** in your Microsoft 365 application.
7. On the **New Microsoft 365 authorization provider** page, in the **Application (client) ID** field, enter the **Application (client) ID** from the Microsoft 365 application by doing the following.
  - a. Go to *https://portal.azure.com*.
  - b. Navigate to **App registrations > Owned applications**, select the application created for Copitrak.
  - c. Navigate to **Overview > Essentials**, and copy the **Application (client) ID** value from this page to the Token Vault **New Microsoft 365 authorization provider** page.
8. On the **New Microsoft 365 authorization provider** page, in the **Client secret (value)** field, enter the **Client secret** from the Microsoft 365 application by doing the following.
  - a. Go to *https://portal.azure.com*.
  - b. Navigate to **App registrations > Owned applications**, select the application created for Copitrak.
  - c. Navigate to **Overview > Essentials > Client credentials**, and copy the value from the **Value** column in this page to the **Client secret (value)** field in Token Vault **New Microsoft 365 authorization provider** page.
9. On the **New Microsoft 365 authorization provider** page, in the **Supported account types** drop-down menu, select **Single tenant**.
10. In the **Tenant name** field, enter your Microsoft 365 tenant name.
11. In the **National Cloud** field, select **Azure AD (global service) - https://login.microsoftonline.com**.
12. In the **Scope sets** field, enter **SharePoint**.
13. Click **Save**.

The new Microsoft 365 authorization provider is registered.
14. On the **Manage authorization provider** page, click **Enable**.

The new Microsoft 365 authorization provider is enabled.

## Authorize the new authorization provider for SharePoint in Token Vault

1. In **Token Vault Configuration** page, navigate to **Available authorization providers**.

2. In the **New Microsoft 365 authorization provider** already registered section, click **Authorize**. You are redirected to the Microsoft Online login page. After the successful login, you get the message notifying that "You successfully authorized this provider."
3. Click **Close** on the message.

Now you can perform scan jobs without authenticating on the Microsoft Office 365 SharePoint cloud server.

## Configure SharePointCommonSettings.config for use with Token Vault

The SharePointCommonSettings.config file under %programdata%\Kofax\Copitrak\Config\ provides a common place for SharePoint specific settings. To use Token Vault with SharePoint, edit the following values from the SharePointCommonSettings.config file.

- Copy the **Provider ID** from your Token Vault **New Microsoft 365 authorization provider** configuration web page to the following value.

```
<add key="TokenVaultSharePointProviderID" value="" />
```

- Copy the server name of your SharePoint tenant to the following value.

```
<add key="Server" value="" />
```

## Configure CommonSettings.config

The CommonSettings.config file under the %programdata%\Kofax\Copitrak\Config\ folder provides a common place to configure global settings for Token Vault and logging. To use Token Vault, you also need to enter the URL used to run Token Vault to the following key from the CommonSettings.config file.

For example: `<add key="TokenVaultUrl" value=https://myhost.acme.com:8381 />`

## Chapter 5

# Scanning workflow

The scan workflow proceeds as follows: pick client-matter, pick a site, document library and folder, and then specify a document title and format.

At each stage, results can be filtered by typing into the text box on the right. Results are displayed 8 at a time, and you can switch between pages of results using the left and right arrows at the top of the list. The arrows are shown in white when you can move forward/backward.

## Indexing library folders

The initial version of SharePoint Connector failed to show library content in the SharePoint folders when a folder contained more than 5000 immediate subfolders. This is due to a limitation of the SharePoint API and affects the online SharePoint only; it does not apply to the on-premise SharePoint. As a workaround to this issue, customers are advised to use Kofax Copitrak OneDrive Connector instead of the online SharePoint.

OneDrive Connector uses Microsoft Graph API and was enhanced to include GraphFolderIndexer.exe, which creates folder index files and supports the use of the Contains filter in addition to the StartsWith filter, enabling faster searches among the folders.

To configure GraphFolderIndexer.exe, use the GraphFolderIndexer.exe.json configuration file, which is available here: C:\ProgramData\Kofax\Copitrak\Config. GraphFolderIndexer.exe.json lists the folder paths for indexing, with names identical to the folder navigation path as seen in Eclipse. Example:

```
"FolderPaths": [
  "Sites/BigRace/BigLibrary/TortoiseFolder"
]
```


To test the configuration, run GraphFolderIndexer.exe with the following command line:

```
C:\ERS\DMS\OneDrive>GraphFolderIndexer.exe -t
```

To build the indexes:

```
C:\ERS\DMS\OneDrive>GraphFolderIndexer.exe -b
```

You can schedule GraphFolderIndexer.exe in Windows Scheduler to create folder index files. Index files are stored in C:\ProgramData\Kofax\Copitrak\GraphFolderIndex, where folder names are identical to the ID of the folder/drive whose content is indexed. GraphFolderIndexer.exe deletes index files with at least two versions and if they are more than 24 hours old.

When a folder is indexed, Eclipse displays it with a magnifying glass icon  to indicate that users can specify Contains filters by entering an asterisk (\*) as their first filter character.