



Tungsten Copitrak

OneDrive Connector Installation and Configuration Guide

Version: 3.5.0

Date: 2024-09-12

TUNGSTEN
AUTOMATION

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Preface

This guide provides instructions for administrators who are responsible for installing and using Tungsten Copitrak OneDrive 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 [Tungsten 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 Tungsten Copitrak 3.5.0 is available here:

<https://docshield.tungstenautomation.com/Portal/Products/Copitrak/3.5.0-9iemtxkeno/Copitrak.htm>

Getting help with Tungsten Automation products

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

To access the Tungsten Automation Knowledge Portal, go to <https://knowledge.tungstenautomation.com/>.

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

The Tungsten Automation 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 Tungsten Automation Community (for all customers).
On the Resources menu, click the **Community** link.
- Access the Tungsten Automation Customer Portal (for eligible customers).
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Tungsten Automation Partner Portal (for eligible partners).
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Tungsten Automation 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 Tungsten Copitrak OneDrive Connector is used to access OneDrive and SharePoint document libraries on the cloud via Microsoft Graph Services, which is referred to within this document as the "DMS".

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

1. Access to Microsoft OneDrive is required.
2. Copitrak CSS Server 3.3.0 or above is required.

Chapter 2

Components and common settings

Tungsten Copitrak OneDrive Connector consists of the following primary components:

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

Both OneDriveHelper.dll and OneDriveTools.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 OneDrive Connector](#) for further details about Token Vault.
- %programdata%\Kofax\Copitrak\Config\OneDriveCommonSettings.config - Provides a common place for OneDrive specific settings.

Chapter 3

Tungsten Copitrak OneDrive logs

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

Copitrak OneDrive produces the following log files:

- ERS\LogFiles\lcwin\LcWinDotNet.log - Contains log messages from all DotNet assemblies running within LcWinService.exe, including OneDriveHelper.dll, DMSPlugin.dll and LCWIN_NET_EXT.dll. Log settings are configured in CommonSettings.config.
- ERS\LogFiles\DMS\OneDriveTools.log - Contains log messages from OneDriveTools.exe. Log settings are configured in CommonSettings.config.
- C:\ERS\WINERS\debug\smtp\<date>_smtp.log - Contains logs from smtp.exe used to send DMS upload email notifications. DebugLevel is configured in ERS\WINERS\smtp.exe.config.

Chapter 4

Tungsten Copitrak OneDrive Configuration

Before configuration, note that Tungsten Copitrak OneDrive 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 OneDrive, the password is then prompted in the Eclipse/Edge user login workflow. For cloud OneDrive on Microsoft 365, the user must authenticate via TokenVault before invoking Eclipse/Edge. See [Configure Token Vault for use with OneDrive Connector](#) for details.

i If scanned documents are to be stored in OneDrive 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

i From Copitrak 3.5.0, you can configure and use multiple DMS scan connectors at the same time. To configure multiple scan connectors, see Chapter 5 in the *Tungsten Copitrak Configuration Guide*.

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

The screenshot shows the Scantrak configuration window with the following settings:

- General:**
 - Currency: USD
 - Unit Mask (eg %%SC%%): %%%S
 - Maximum Time to Retain Session Billing Information after terminal has Ended: 60000
 - EXR File Number: 350
 - Track TIF / TIFF: ☒
 - Track JPG / JPEG: ☒
 - Track PDF / CPY: ☒
 - Track DOC/DOCX/RTF: ☒
 - Track Non-Billed Scans: ☐
 - Route Scans Only - No Billing: ☐
 - Convert JTIFs to TIFs: ☒
 - Store Scan Transactions as Print Type: ☐ (highlighted in yellow)
 - Unique Email Attachment Names: ☐
 - Store General 9 in DB: No
- Email and Routing:**
 - Scan Tree Root: c:\ers\scans\scan-in
 - Main Scan Ini Control Path: c:\ers\scans\scan-in
 - Non-Enabled Scan Copy Path: c:\ers\scans\failed
 - Main Routing Path: c:\ers\scans\mainroute
 - Rename Formula (Success): %r_%d_%t.%e
 - Rename Formula (Failed): %r_%d_%t.%e
 - Default %i(Desc) Value for Renamed Scans: Scan
 - Maximum Size of an Email Attachment (Eclipse): [blank]
 - Maximum Size of an Email Part: [blank]
 - Link Item Text: %s
 - Link Message: Your Scan File Is Ready.
 - Send Link as Root Folder: ☒
- DMS:**
 - DMS System: OneDrive

Buttons at the bottom: OCR / Compression, Advanced, XMLRouting, Save & Back, Cancel, Set 2010 Defaults.

- Under the **DMS** section, in the **DMS System** drop-down menu, select **OneDrive**.

i When configuring your OneDrive connector with CSS version 3.5.0 or later, see Chapter 5 in the *Tungsten Copitrak Configuration Guide* and skip to [step 6](#).

- Leave the **Default Database** field blank.
- Leave the **Server** field blank.
- Click **Save & Back**.

Configure the DMS Route in Scantrak

- Open Config File Manager.

2. Press the **Scantrak** button.
3. Press the **XML Routing** button.

The **Scantrak - Description Routing** page appears.

Description	Action	Rename Formula	Notify	Dual Bates	Null Test
COPIES	DIR-C:\ERS\Scans\users\%N0132	%g0160100	N	N	N
DIRPER	DIR-C:\ERS\Scans\users\%N0132	%g0160100_%d_%t	N	N	N
EMAIL	SMTP	%g0160100	N	N	N
DIRCOURT	DIRSS-1C:\ERS\Scans\users\%N0132\Court	%g0160100	N	N	N
DMSiman	EXE-C:\ers\DMS\Manage\ManTools\ManTools...	%g0160100	N	N	N
DMSzarep	EXE-C:\ERS\DMS\SharePoint\SharePointTools\S...	%g0160100	N	N	N
DMSOneDrive	EXE-C:\ERS\DMS\OneDrive\OneDriveTools.exe	%g0160100	N	N	N

Terminal Key Root:

Terminal Key Postfix:

Action:

Action Postfix:

Rename:

Note: This Rename Formula goes by Routing Formula Syntax and must not include any file extension.

Backup Folder For Routed Scans:

Backup Folder For Scan Banner Jobs:

Buttons: Terminal Setup, WorkCodes, Save & Back, Cancel

4. Add a route.
Typically, DMS is used for the description.
Action is EXE-"C:\ERS\DMS\OneDrive\OneDriveTools.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 OneDrive.

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 OneDrive".

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: DMSOneDrive ☐ Do Not Clear Fields

Route Friendly Name (Terminal): OneDrivePaul2

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

General2 - 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	Root	PickList	.	.
Prompt: .				
Reject: .				
No Results: .				

General4

Pick List Source	Pick List Title	Validation	Mask	Default
2	Drive Source	PickList	.	.
Prompt: .				
Reject: .				
No Results: .				

Save & Back Cancel

Scantrak Routing Terminal Configuration

Active Route

DMSOneDrive

☐ Do Not Clear Fields

Route Friendly Name (Terminal)

OneDrivePaul2

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

Available Terminal Groups

Selected Terminal Groups

REGULAR

Available User Groups

Selected User Groups

ADMIN

REGULAR

Available Language

Selected Language Groups

ENGLISH

Set Route Defaults

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

General5

Pick List Source

I3-1

Pick List Title

Drive.

Validation

PickList

Mask

.

Default

.

Prompt

enter drive

Reject

failed to get drive

No Results

no drive

General6

Pick List Source

I3-3

Pick List Title

Folder

Validation

PickList

Mask

.

Default

.

Prompt

enter folder

Reject

failed to get folder

No Results

no folder

General7

Pick List Source

X

Pick List Title

.

Validation

Default

Mask

.

Default

.

Prompt

.

Reject

.

No Results

.

Save & Back

Cancel

Scantrak Routing Terminal Configuration

Active Route

DMSOneDrive

☐ Do Not Clear Fields

Route Friendly Name (Terminal)

OneDrivePaul2

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

Available Terminal Groups

Selected Terminal Groups

REGULAR

Available User Groups

Selected User Groups

ADMIN

REGULAR

Available Language

Selected Language Groups

ENGLISH

Set Route Defaults

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

DMSOneDrive

☐ Do Not Clear Fields

Route Friendly Name (Terminal)

OneDrivePaul2

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

Available Terminal Groups

Selected Terminal Groups

REGULAR

Available User Groups

Selected User Groups

ADMIN

REGULAR

Available Language

Selected Language Groups

ENGLISH

Set Route Defaults

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

Scantrak Routing Terminal Configuration

Active Route

DMSOneDrive

☐ Do Not Clear Fields

Route Friendly Name (Terminal)

OneDrivePaul2

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

Available Terminal Groups

Selected Terminal Groups

REGULAR

Available User Groups

Selected User Groups

ADMIN

REGULAR

Available Language

Selected Language Groups

ENGLISH

Set Route Defaults

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

General14

Pick List Source

Pick List Title

Validation

Mask

Default

X

.

Default

.

.

Prompt

.

Reject

.

No Results

.

General15

Pick List Source

Pick List Title

Validation

Mask

Default

X

.

Default

!

.

Prompt

.

Reject

.

No Results

.

General16

Pick List Source

Pick List Title

Validation

Mask

Default

.

docname

Open

.

.

Prompt

doc name

Reject

.

No Results

no doc name

Save & Back

Cancel

16

Scantrak Routing Terminal Configuration

Active Route: DMSOneDrive ☐ Do Not Clear Fields

Route Friendly Name (Terminal): OneDrivePaul2

Set Route Defaults

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

Route Specific Options

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

Account Validation: Validated (Open Com Fail)

Account Default: .

☐ Non Preview Route

☐ Menu Key on Enablement Screen

☐ Show Next File Key

Next File Text: .

☐ Preview Next Job Key Auto Next/Menu/Back

☒ Show Bates General 2

☐ Show Bates General 3

☐ Show Bates General 4

☐ Show Bates General 5

☐ Show Bates General 6

☐ Show Bates General 7

☐ Show Bates General 8

☐ Show Bates General 9

☐ Show Bates General 10

☐ Show Bates General 11

☐ Show Bates General 12

☐ Show Bates General 13

☐ Show Bates General 14

☐ Show Bates General 15

☒ Show Bates General 16

Save & Back Cancel

12. Make changes based on the selected mode.

Picklist Source	Description
!1	Root Selection Choices are Me and Groups . Me stands for your own OneDrives and Groups stand for the user groups that own the OneDrives or SharePoint sites.
!2	Drive Source Selection Returns either your user or a list of groups, depending on the selected Root.
!3-1	Drive Selection Returns all drives belonging to the selected Drive Source.
!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 OneDriveCommonSettings.config

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

```
<appSettings>
<add key="TokenVaultOneDriveProviderId" value="bbbbbbbbb-bbbb-bbbb-bbbb-
bbbbbbbbbbbb" />
<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>
```

Client, Matter and ClientMatterSplitter settings are ignored.

3. Save the file after making changes.

Configure Token Vault for use with OneDrive 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 Tungsten Copitrak OneDrive 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 [Tungsten 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 **Graph**.
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 OneDrive 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 OneDrive cloud server.

Configure OneDriveCommonSettings.config for use with Token Vault

The OneDriveCommonSettings.config file under %programdata%\Kofax\Copitrak\Config\ provides a common place for OneDrive specific settings. To use Token Vault with OneDrive, open the OneDriveCommonSettings.config file and copy the **Provider ID** from your Token Vault **New Microsoft 365 authorization provider** configuration web page to the following value.

```
<add key="TokenVaultOneDriveProviderID" 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 root, drive source, drive and folder, and then specify a document name 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.