

Kofax Communication Server

TC/LINK-RS SharePoint Integration Technical Manual

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The logo for Kofax, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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Preface

This document explains how to use the **Kofax Export Connector 8.3.0 for Microsoft SharePoint** together with *TC/LINK-RS* (KCS Link to export connectors).

The Kofax Export Connector 8.3.0 for Microsoft SharePoint supports Microsoft SharePoint 2007, 2010, and 2013.

Together with *TC/LINK-RS*, this export connector releases fax and SMS messages from the TCOSS server into the SharePoint repository.

Related documentation

This document refers to the following documentation:

- Online help provided with the Kofax Export Connector 8.3.0 for Microsoft SharePoint
- Release Notes of the Kofax Export Connector 8.3.0 for Microsoft SharePoint
- TC/LINK-RS Technical Manual

For more information about Microsoft SharePoint or other Microsoft products, contact your Microsoft representative or refer to the documentation available with the Microsoft product.

The full documentation set for Kofax Communication Server is available at the following location:

https://docshield.kofax.com/Portal/Products/en_US/KCS/10.3.0-SihMvq5oti/KCS.htm

Chapter 1

System Requirements

This section lists the supported server versions as well as the system requirements for installation of the Kofax Export Connector 8.3.0 for Microsoft SharePoint.

SharePoint Support

This export connector requires the following network server components:

- Microsoft SharePoint 2013
- Microsoft SharePoint 2010
- Microsoft SharePoint 2007

Microsoft .Net Framework 3.0

Installation of Kofax Export Connector 8.3.0 for Microsoft SharePoint requires an installation of Microsoft .NET Framework 3.0. You can download this software for free from the Microsoft web site.

Operating System

Refer to the Technical Specifications document.

Additional Software Requirements

Before installing the export connector, TC/LINK-RS must be installed on the computer. Export connector setup checks if a supported version of Kofax Capture is installed. This is done by reading the registry value `HKLM\Software\Kofax Image Products\Ascent Capture\3.0\CurrentVersion`. TC/LINK-RS setup sets this registry value to "10.0".

Privileges

To install Kofax Export Connector 8.3.0 for Microsoft SharePoint, 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.

Chapter 2

Source Code

The source code for this export connector is provided and is available in the MS\SP folder on the Kofax Export Connector 8.3.0 for Microsoft SharePoint installation CD. You can open the source code, edit it, and compile it in Microsoft Visual Studio 2005.

To modify the export connector, do the following:

1. When you install the [install the Microsoft SharePoint Export Connector](#), you install the required components referenced in the source code.

Note If the export connector was not installed to the default folder (C:\Program Files (x86)\Kofax\Capture\bin\Kofax.SharePoint.8), 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 2005 to reference their correct locations in the non-default installation folder.

2. Open the source code, make any make changes as needed, and compile the Microsoft SharePoint source code in Microsoft Visual Studio 2005.
3. Copy the Kofax.SPRel07_v7.ReleaseScript.dll to the installation folder (for example, C:\Program Files\Ascent\CAP\SP\Kofax.SPRel07_v7.ReleaseScript.dll).
4. When you are prompted to replace the existing file, select **Yes**.
5. Repeat this procedure on each workstation that will be using the Microsoft SharePoint export connector.

Note To successfully modify and compile the export connector, development must occur on a workstation with the appropriate versions of TC/LINK-RS, TAPCommon, and NUnit 2.2.8 for .NET 2.0 previously installed. To use the modified export connector, you must replace the Microsoft SharePoint export connector Kofax.SPRel07_v7.ReleaseScript.dll with the modified version on the TC/LINK-RS workstation. If you receive an "access denied " error, you will need to close TCReleaseConfig and TC/LINK-RS.

Refer to the documentation available for the Microsoft SharePoint product and Microsoft Visual Studio 2005 for assistance.

Chapter 3

Installing the Export Connector

You must install the Kofax Export Connector 8.3.0 for Microsoft SharePoint on every TC/LINK-RS workstation.

Installation Instructions

1. Insert your Kofax Export Connector 8.3.0 for Microsoft SharePoint installation CD into your CD drive.
2. From your Windows task bar, select **Start | Run**, browse to the MS\SP folder on the CD, and run **Setup.exe**. The installation program starts.
3. Follow the instructions on your screen to install the export connector.
When the installation is complete, a message is displayed indicating that the export connector was successfully installed.
4. The export connector needs the Kofax.ReleaseLib.Interop.dll component. The TC/LINK-RS Setup copies this file to the default working folder of the export connector (C:\Program Files (x86)\Kofax\Capture\bin\Kofax.SharePoint.8). If you install the export connector to another location, copy this file to the working folder of the export connector. Otherwise, you cannot start the configuration GUI of the export connector.
5. Start the TCReleaseConfig application to register the export connector in the TC/LINK-RS configuration folder:
 - a. In the Release scripts panel, click **Add**.
 - b. Select **SPRel07_v7.INF** in the working folder of the Kofax Export Connector 8.3.0 for Microsoft SharePoint.
 - c. Click **Install**.
6. Repeat this procedure on all TC/LINK-RS workstations that will use the Kofax Export Connector 8.3.0 for Microsoft SharePoint.

Chapter 4

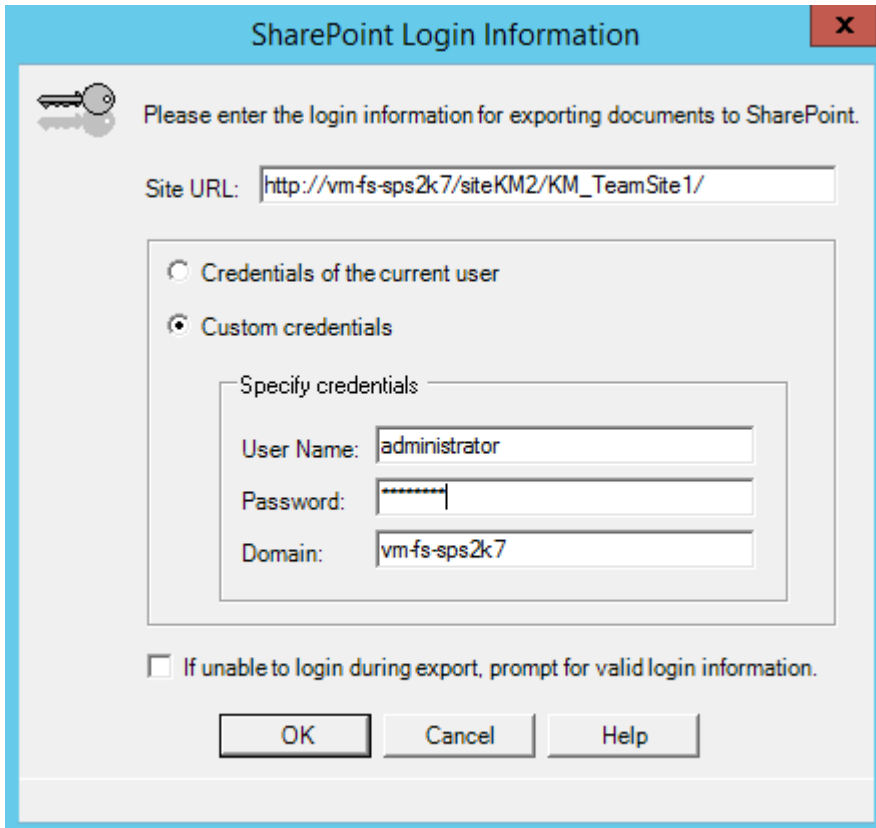
Logging on to the Export Connector

Once you have installed the export connector and associated a document class with a batch class in TCReleaseConfig, you may specify the export connector to use when releasing your documents.

To log on to the export connector, do the following:

1. Start the TCReleaseConfig application and log on to the configuration of the correct TC/LINK-RS instance.
2. Go to the **Release setups** tab and click **Add**.
3. In the **New Release Setup** window, select the document class you need and select the Ascent 7.5 for Microsoft SharePoint export connector. Then click **OK**.
The **SharePoint Login Information** window is displayed.

4. Enter your Microsoft SharePoint user name, password, and domain. The "Domain" property is only used when a different Microsoft SharePoint domain is needed.



The screenshot shows a dialog box titled "SharePoint Login Information" with a close button (X) in the top right corner. The dialog contains a key icon and the text "Please enter the login information for exporting documents to SharePoint." Below this is a "Site URL:" label followed by a text box containing "http://vm-fs-sps2k7/siteKM2/KM_TeamSite1/". There are two radio button options: "Credentials of the current user" (unselected) and "Custom credentials" (selected). Under "Custom credentials", there is a "Specify credentials" section with three text boxes: "User Name:" containing "administrator", "Password:" containing a masked password, and "Domain:" containing "vm-fs-sps2k7". At the bottom, there is a checkbox labeled "If unable to login during export, prompt for valid login information." which is unchecked. Three buttons are at the bottom: "OK", "Cancel", and "Help".

Note The login information is saved and used during release.

5. Do not select the **If unable to log in during release, prompt for valid login information** check box. Otherwise, the export connector tries to prompt for a user ID and password if it is not able to log in to SharePoint at release time. As release is invoked by TC/LINK-RS (in a service and potentially without a user login session), such a prompt would be unrecognized and would cause problems.
6. Click **OK** to display the release setup window. For information about release setup, see [Setting Up the Export Connector](#).

Chapter 5

Features

This section contains information about features provided with the Kofax Export Connector 8.3.0 for Microsoft SharePoint.

Online Help Available for Export Connector

Online Help is installed with your export connector. It is available when you are setting up your export connector via TCReleaseConfig. To display Help information, click the **Help** button from the Release Setup window.

Image Support

This export connector GUI offers the following file formats/compression formats.

Note Some formats are only available in a full Kofax Capture installation, but not with TC/LINK-RS.

Format	Supported by TC/LINK-RS
Multipage TIFF with Group 3, Group 3/2D, and Group 4 Compression	Yes
Multipage TIFF – Uncompressed	Yes
Multipage TIFF with JPEG Compression	No
Kofax PDF	No

Kofax PDF: Not Supported by TC/LINK-RS

The Kofax Export Connector 8.3.0 for Microsoft SharePoint offers image format Kofax PDF. TC/LINK-RS is not able to provide this image format.

Kofax PDF is bundled with Kofax Capture and is only available in a standard Kofax Capture installation.

OCR Full Text: Interpreted as Text Content by TC/LINK-RS

With the Kofax Export Connector 8.3.0 for Microsoft SharePoint, you can release the message text (but not text alternatives) as a separate text document into the Microsoft SharePoint repository. This feature can be useful for text messages like SMS.

It can be activated via the OCR Full Text Options in the Export Connector configuration GUI.

Note TC/LINK-RS does not include true OCR. It uses the option called OCR Full Text to provide the message text in textual format, additionally to the image.

eDocument Support

The current version of TC/LINK-RS does not provide eDocuments.

Specify Storage Location for Released Documents

The Kofax Export Connector 8.3.0 for Microsoft SharePoint allows you to specify where in SharePoint you would like to store your released documents. To do so, on the [Destination Settings](#) tab, specify a library path and optional folder destination.

Assign Kofax Capture Values to Document Attributes (SharePoint Columns)

The Kofax Export Connector 8.3.0 for Microsoft SharePoint allows you to link Kofax Capture values to SharePoint columns. This makes it possible to dynamically populate SharePoint with meaningful metadata as you release documents. You can first select a SharePoint content type which displays its associated SharePoint columns. Then, link Kofax Capture values with each column. During release, it automatically associates metadata with each document released to a SharePoint library.

Examples of release values include document index fields, batch fields, Kofax Capture values, and text constants.

TC/LINK-RS can provide message metadata as document index fields or batch fields.

TC/LINK-RS also provides the document ID, release data and time and the name of the TC/LINK-RS instance as Kofax Capture values.

The names of "required" SharePoint columns are marked with an asterisk (*), giving you a visual indicator that certain fields must be linked.

Chapter 6

Additional Information

This section contains additional information about Kofax Export Connector 8.3.0 for Microsoft SharePoint.

Documents Overwritten in SharePoint

If you export a file to SharePoint, an existing file with the same name in SharePoint will be overwritten. If versioning is enabled in SharePoint, a new version of the document is created.

This is a change in behavior compared to the previous release of this export connector (Ascent 7.5 Release Script for Microsoft Office SharePoint 2007). The older connector always created a new file with a unique name.

“Forms” as Name Is 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 Released Documents

The export connector automatically appends a file extension of .TIF to released documents depending on the image type 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

There are no examples for PDF file names, because TC/LINK-RS supports only TIF output.

OCR File Naming

OCR full text files use the following file naming convention:

```
<AscentValue>_OCR.<extension>
```

OCR Full Text Options

To release OCR full text files, you must enable the "Release OCR full text file with document" option on the Release Setup | [Image Settings](#) tab. In addition, you must select "Enable OCR full text" in your applicable document class properties.

To enable OCR full text processing for a document class, do the following:

1. Start TCReleaseConfig and select the document class in the Document classes tab.
2. Click **Modify**.
3. Select the **OCR enabled** check box.
4. Click **OK**.

Note If you are releasing a message that does not contain plain text and you select this option, release fails.

Skip First Page

The "Skip first page of each document" option specified on the [General Settings](#) tab allows you to discard the first page of each document from the image. However, if you are releasing only one image in a document and you select this option, release fails.

Release Working Folder

You must specify a release working folder to be used to temporarily store released images.

By default, the release working folder is:

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

Note The working folder must be writable by all users.

At release, if you specified a release working folder other than the default, documents are released to:

```
<specified release working folder>
```

If the release 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 release folder.

Compiling the Export Connector Requires NUnit

Currently, the export connector contains NUnit code. NUnit is an open source unit testing framework for Microsoft .NET. NUnit testing tools allow the code to conduct unit tests to determine whether various sections of the code are acting as expected in various circumstances. Test cases describe tests that need to be run on the program to verify that the program runs as expected.

If you make modifications to the export connector and need to rebuild it, you must install NUnit. For more information about NUnit and to obtain NUnit, refer to www.nunit.org. NUnit 2.2.8 for .NET 2.0 is needed to successfully compile the export connector.

Chapter 7

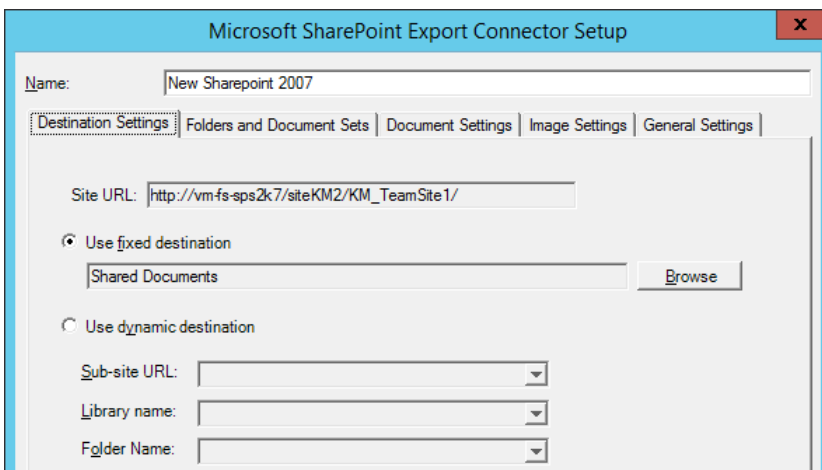
Setting Up the Export Connector

The following sections describe the setup options available with Kofax Export Connector 8.3.0 for Microsoft SharePoint.

Note For more details about the setup options, refer to the Help available from the Kofax Export Connector 8.3.0 for Microsoft SharePoint – Release Setup window.

Destination Settings Tab

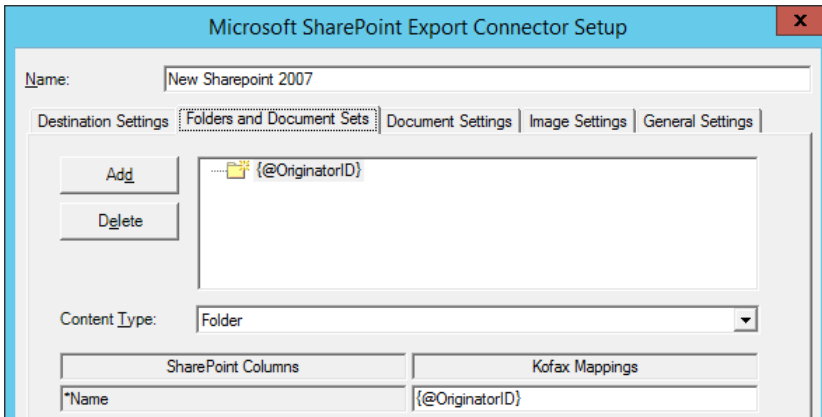
Use this tab to specify a SharePoint destination.



The screenshot shows the 'Microsoft SharePoint Export Connector Setup' window with the 'Destination Settings' tab selected. The 'Name' field is set to 'New Sharepoint 2007'. The 'Site URL' field contains 'http://vm-fs-sps2k7/siteKM2/KM_TeamSite1/'. The 'Use fixed destination' radio button is selected, and the 'Shared Documents' folder is chosen in the dropdown menu next to a 'Browse' button. The 'Use dynamic destination' radio button is unselected. Below it, there are three dropdown menus for 'Sub-site URL', 'Library name', and 'Folder Name', all of which are currently empty.

Folders and Document Sets Tab

Use this tab to specify your folders and document sets destination.



Document Settings Tab

This tab allows you to select a SharePoint content type which displays its associated SharePoint columns. This tab also allows you to link Kofax Capture values to 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, refer to the *Export Connector help*.

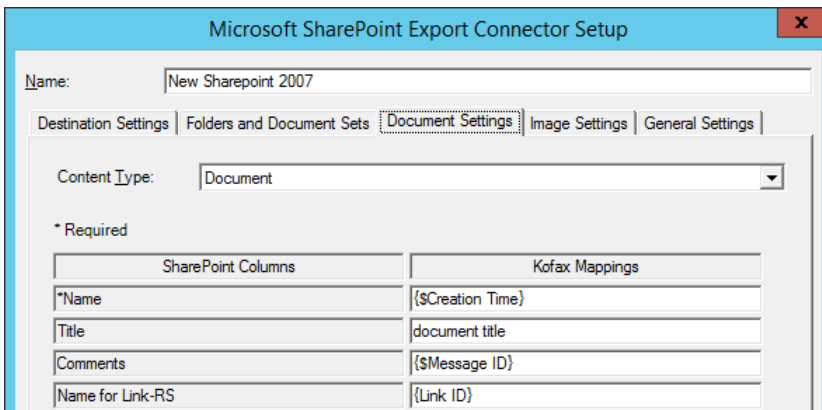
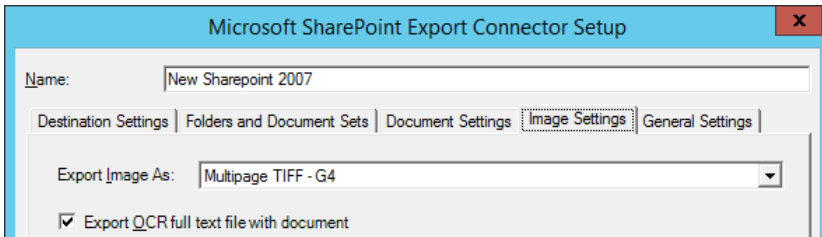


Image Settings Tab

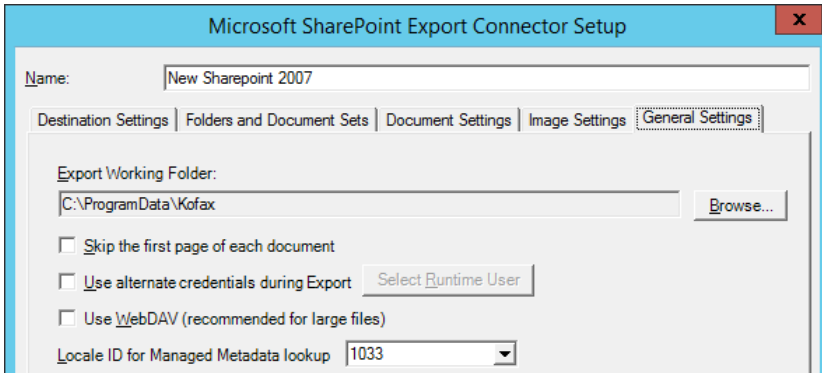
This tab allows you to select an image format for your released images, and specify whether to release OCR full text files with your document. If you specify OCR full text release, any message without text content is rejected.

Note TC/LINK-RS does not support some formats offered in this tab, including the Adobe PDF formats. See [Image Support](#) for more information about supported image formats.



General Settings Tab

This tab allows you to specify a release working folder as the temporary storage location to be used at release time, and to specify whether to skip the first page of each document.



Browse For Folder Window

This window allows you to specify a release working folder to be used to temporarily store released images. You can select an existing folder or create a new one.

Activating a Configuration

Activating a release setup configuration involves two main tasks:

- Assigning it to a TCOSS user or (for global use) to a fax channel group on the TCOSS server.
- Defining events that route messages to TC/LINK-RS.

Both steps are done via the application TCRReleaseConfig and are described in detail in the *TC/LINK-RS Technical Manual*. This section only contains step-by-step description in brief.

1. Select the release setup in the **Release setups** tab of TCRReleaseConfig and click **Assign**.
The **Assignments** dialog box is displayed
2. Type in or search for the name of the TCOSS user whose fax messages shall be released via this configuration. Click **Add** to add the name to the user list. Then click **OK**.
The **Assignment status** window opens.
3. If there is no event defined for the user, create an event - on the context menu item, select **Create event**, set the event status to **Enabled** and click **OK**.
4. Send some sample messages to test the operation of the export connector. The way of sending the test messages depends on the event type:
 - To use the Inbound Release event of a user, send a fax to the user's fax number.
 - To use the Outbound Release event of a user, log in to TCFW as this user, and compose and send a message to an external fax number.
5. Make sure that TC/LINK-RS is active. The event messages are routed to the TC/LINK-RS message queue, and TC/LINK-RS invokes the export connector.
6. Check the resulting documents in the SharePoint repository.

Chapter 9

Application Maintenance

This application can be repaired or uninstalled as a standard Windows application.

Note After uninstalling, the Kofax Export Connector 8.3.0 for Microsoft SharePoint stays visible in the TCReleaseConfig application, but it is not be functional. To remove the export connector from the list, select the applicable export connector from the Release scripts panel in TCReleaseConfig and click **Delete**.

Chapter 10

Known Problems

This section contains information about known problems with the Kofax Export Connector for Microsoft SharePoint. Refer to the latest export connector release notes for an updated list.

Deleting and Recreating a SharePoint Library May Result in an Error

Deleting and recreating a SharePoint library after saving release 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. Revisit release setup.

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

Deleting and Recreating a SharePoint Content Type May Result in a Warning

Deleting and recreating a SharePoint content type after saving release 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. Revisit release setup.

This message occurs because each SharePoint content type has a unique ID. When you delete and recreate 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 Recreating a SharePoint Column May Result in Warnings

Deleting and recreating a SharePoint column after saving release 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. Revisit release setup.

Unique SharePoint Column ID

The system may also display the following message:

"Please assign an 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. Revisit release setup.

These messages occur 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.

Turning Off SharePoint Document Versioning Causes File Overwrite

If you release documents to a SharePoint library that has document versioning turned off, the export connector overwrites the existing documents with the same names.

To prevent overwriting documents when SharePoint document versioning is turned off, do the following:

1. Create a permission level with “Add Items” and “Edit Items” permissions.
2. Log in to the SharePoint home site.
3. In the upper right-hand corner, click **Site Actions | Site Settings | Modify All Site Settings**.
4. From the Users and Permissions column, click **Advanced Permissions**.
5. From the Settings menu, click **Permission Levels**.
6. Click **Add a Permission Level**.
7. In the **Name** field, enter a name for the permission level, such as “Add Only”.
8. Under the List Permissions heading, select the “Add Items” and “Edit Items” check boxes. (This automatically selects View Items under the List Permissions heading and View Pages and Open under the Site Permission heading.)
9. Click **Create**.
10. Navigate to the destination library and set the export connector user's permissions to the newly created permission type.
11. As the export connector user, log in to the SharePoint export connector and perform the release setup.

When you release the documents with the above settings, SharePoint flags them as duplicate documents and rejects them with an “Access denied” message. KCS will negatively terminate such message if the registry value NegTermOnError is set to 1.

Export Connector May Transfer Out-of-Range Numeric Data

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

Limit on Length of SharePoint Column Names

SharePoint column names that exceed 179 characters will cause an “unexpected exception” error when you save the export connector. To solve this problem, rename or hide the lengthy column.

Release May Fail with Access Denied Error

The release may fail with the following error message even though permissions seem to be set correctly for the root destination:

“The user (<username>) does not have the required permission(s) to release a document to the specified destination (<root destination>). Please ask your system administrator to assign the appropriate permissions.”

This behavior occurs if the user does not have at least a Contribute permission level plus “Add and Customize Pages” permission for the following scenarios:

- The root destination's library does not exist in SharePoint.
- The document name contains invalid characters.

Release May Fail with Missing Attributes Message

The release may fail with the following error message even though all required columns appear to have associated Kofax 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 release setup has been saved and published.

To correct the problem, configure the column to be "Optional" before making it a hidden column.

Any Value Can Be Released to a Choice Column

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

URLs Containing Commas Are Ignored

When you upload a URL that contains commas to a SharePoint Hyperlink/Picture column, the URL is ignored.

Invalid Folder Name Characters

SharePoint does not allow the following characters to be used in folder names:

- 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.

Multiple Lines of Strings

The Kofax Export Connector 8.3.0 for Microsoft SharePoint currently only supports setting single line values to a SharePoint "Multiple lines of text" column type.

Number Column Type and Scientific Notation

No value is set during release for any SharePoint column of type Number when you specify a value in scientific notation, such as 1.0e+20.

Release May Succeed with Invalid Credentials

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

1. Release is running as a service (TC/LINK-RS usually runs as a service).
2. Release succeeds with valid credentials before the user's password is changed.

3. The user's password is changed.

Runtime Error Temporarily Displays When Closing TcReleaseConfig

A runtime error may temporarily display when you perform the following operations:

1. Open an existing release setup in TcReleaseConfig.
2. Make a change.
3. Save and close the export connector GUI.
4. Close TcReleaseConfig.