



Kofax Export Connector for Microsoft SharePoint Administrator's Guide

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KOFAX

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Table of Contents

Preface.....	4
System requirements.....	4
Product documentation.....	4
Offline documentation.....	5
Training.....	6
Getting help with Kofax products.....	6
Chapter 1: Install the export connector.....	8
Install export connector to use with Kofax Capture or Kofax Express.....	8
Register the export connector manually.....	9
Select the language.....	9
Install export connector to use with Kofax TotalAgility.....	10
Select the language.....	10
Chapter 2: Set up the export connector.....	11
Use Kofax Capture to set up the export connector.....	11
Use Kofax TotalAgility to set up the export connector.....	12
Use Kofax Express to set up the export connector.....	14
Use OAuth authentication.....	15
Setup options.....	16
General settings - backward compatibility.....	17
Modifying the source code.....	18
Export connector details.....	18
'Forms' name not supported.....	18
File names and extensions for exported documents.....	19
OCR file naming.....	19
Chapter 3: Remove the Export Connector.....	20
Remove the Export Connector from Kofax Capture.....	20
Remove the Export Connector from a batch class.....	20
Remove the Export Connector from the Export Connector Manager.....	20
Remove the Export Connector from Kofax Express.....	20
Remove the Export Connector from a job.....	20
Remove the export connector registration.....	21
Remove the Export Connector from Kofax TotalAgility.....	21
Remove the Export Connector from the computer.....	21
Repair the Export Connector.....	22

Preface

This guide includes the information you need to successfully install and configure Kofax Export Connector for Microsoft SharePoint. This export connector copies document images, OCR Full Text files, Kofax PDF documents, and eDocuments to permanent storage and writes data from Kofax Capture, Kofax TotalAgility, or Kofax Express into the Microsoft Office SharePoint repository or the SharePoint Online for Office 365 repository.

System requirements

The primary source of information about system requirements and dependencies on other products is the [Technical Specifications](#) document, which is available on the [Kofax Export Connector for Microsoft SharePoint Product Documentation](#) page. The Technical Specifications document is updated regularly, and we recommend that you review it carefully to ensure success with your export connector product.

Product documentation

The Kofax Export Connector for Microsoft SharePoint documentation set is available online at the following URL¹:

https://docshield.kofax.com/Portal/Products/KEC_SP/8.6.0-q63xwb0w07/KEC_SP.htm

The full documentation set includes the following items:

Kofax Export Connector for Microsoft SharePoint Release Notes

Contains late-breaking product information not included in other product documentation.

Kofax Export Connector for Microsoft SharePoint Technical Specifications

Contains information on supported operating systems and other system requirements.

¹ You must be connected to the Internet to access the full documentation set online. For access without an Internet connection, see "Offline documentation."

Kofax Export Connector for Microsoft SharePoint Administrator's Guide

Contains information for administrators who are responsible for configuring and maintaining Kofax Export Connector for Microsoft SharePoint.

Help for Kofax Export Connector for Microsoft SharePoint

Describes the configuration settings required to set up the Kofax Export Connector for Microsoft SharePoint application.

Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Export Connector 8.6.0 for Microsoft SharePoint product package that you downloaded from the [Kofax Fulfillment Site](#). The product package includes the following documentation files for offline use:

- `KofaxExportConnectorDocumentation_8.6.0_forMicrosoftSharePoint_EN.zip`
Contains the entire product documentation set in English.
- `KofaxExportConnectorDocumentation_8.6.0_forMicrosoftSharePoint_JA.zip`
Contains the entire product documentation set in Japanese.

For each language, the .zip file includes two folders:

- The **print** folder: Contains the *Kofax Export Connector for Microsoft SharePoint Administrator's Guide*
- The **help** folder: Contains *Help for Kofax Export Connector for Microsoft SharePoint*

1. After you install Kofax Export Connector 8.6.0 for Microsoft SharePoint, in the product installation folder, create the folder named **Documentation**.
2. In the newly created **Documentation** folder, create the language code folders for the required languages:
 - For English, create the folder named **EN**
 - For Japanese, create the folder named **JA**
3. Extract the contents of the documentation compressed file for the language you require to the following location:

- For Kofax Capture:

```
[drive:]\Program Files (x86)\Kofax\Capture\ServLib\Bin  
\Kofax.SharePoint.8\Documentation\[drive:]\Program Files (x86)\Kofax\CaptureSS\ServLib\Bin  
\Kofax.SharePoint.8\Documentation\
```

- For Kofax Express:

```
[drive:]\Program Files (x86)\Kofax\Kofax Express\bin  
\Kofax.SharePoint.8\Documentation\
```

- For Kofax TotalAgility:

```
[drive:]\Program Files (x86)\Kofax\TotalAgility\ExportConnectors\bin  
\Kofax.SharePoint.8\Documentation\
```

i The Documentation folder is not removed automatically in case the product is uninstalled, and you need to delete it manually.

4. Start the Kofax Export Connector for Microsoft SharePoint application and click the Help icon to open the help in a separate browser window.

To use the PDF documentation offline, you can keep it in the **Documentation** folder or a different location on your computer. The **help** folder should always remain in the **Documentation** folder. When the offline documentation is installed according to these instructions, the product will use the offline version of the documentation by default, even if an active Internet connection exists.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax solution. Visit the Kofax Education website at <https://learn.kofax.com/> for complete details about the available training options and schedules.

Getting help with Kofax products

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

To access the Kofax Knowledge Base:

1. Go to the [Kofax website](#) home page and select **Support**.
2. When the Support page appears, select **Customer Support > Knowledge Base**.

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

The Kofax Knowledge Base 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.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

From the Knowledge Base home page, you can:


- Access the Kofax Community (for all customers).
Click the **Community** link at the top of the page.

- Access the Kofax Customer Portal (for eligible customers).
Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).
Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Go to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1


Install the export connector

You can install the export connector on a client or standalone workstation to use with Kofax Capture, Kofax Express, or Kofax TotalAgility.

 To install the export connector, you must have Windows administrator privileges. If you do not have administrator privileges and install this export connector, error messages may occur. Also, before you install the export connector, verify that your environment meets the requirements listed in the [Technical Specifications](#) document.

Install export connector to use with Kofax Capture or Kofax Express

1. Copy the product files from the installation media to the Administration or Export workstations where you plan to use the export connector.
2. Verify that Kofax Capture or Kofax Express is already installed. Otherwise, an error will occur if you attempt to install the export connector.
3. In the product files, locate and run **Setup.msi**.
 - If Kofax Export Connector 8.5 for Microsoft SharePoint is detected, you are prompted to upgrade to the latest version. After you click **OK**, the upgrade is performed. In this scenario, existing export connector settings are preserved for use with the new version.
 - If Kofax Export Connector 8.4 for Microsoft SharePoint or earlier is currently installed, we recommend that you uninstall it before installing Kofax Export Connector 8.6.0 for Microsoft SharePoint. Also, you may want to note the current settings for reference after installation.
4. Click **Next** and follow the instructions on the screen to install the export connector.
5. Repeat the installation procedure on all workstations where you plan to use the export connector.

 With Kofax Capture 11.0 or later, the export connector is automatically registered. If you plan to use the export connector with Kofax Capture 9 or 10, or with Kofax Express, manual steps are required to register the connector. See [Register the export connector manually](#).

6. Configure settings for the export connector. See [Set up the export connector](#).

Register the export connector manually

The export connector is automatically registered for use with Kofax Capture 11.0 or later after you complete the installation procedure. However, to use the export connector with Kofax Capture 9 or 10, or with Kofax Express, you must use the procedure in this section to register the connector.

1. Verify that .NET Framework 4.6.2 or later is installed.
2. Navigate to the `bin` folder in your Kofax Capture or Kofax Express installation.
3. For Kofax Capture:
 - a. In the `bin` folder, create two files: `Admin.exe.config` and `RegAscSc.exe.config`.
 - b. Add the following settings to both of the newly created files:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
<startup useLegacyV2RuntimeActivationPolicy="true">
<supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0"/>
<supportedRuntime version="v2.0.50727"/>
</startup>
</configuration>
```

- c. In the `bin` folder, add the following setting in front of the `</configuration>` tag in `Release.exe.config`:

```
<startup useLegacyV2RuntimeActivationPolicy="true">
<supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0"/>
<supportedRuntime version="v2.0.50727"/>
</startup>
```

4. For Kofax Express:

In the `bin` folder, add the following setting in front of the `</configuration>` tag in `RegAscSc.exe.config`:

```
<startup useLegacyV2RuntimeActivationPolicy="true">
<supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0"/>
<supportedRuntime version="v2.0.50727"/>
</startup>
```

5. Open a Command Prompt window, navigate to the `Kofax.SharePoint.8` folder, and execute the following command:

```
RegAscSc /f Kofax.SharePoint.Export.inf
```

i If the registration fails for Kofax Capture 10.0.2 or later, turn off UAC and run the Windows Command Prompt as an Administrator, or log on to Windows as an Administrator.

Select the language

Use one of the following procedures to select the export connector language. Your selection goes into effect after you restart Kofax Capture or Kofax Express.

- In Kofax Capture, open the **Administration** or **Batch Manager** module, select **Options > Language**.
- In Kofax Express, select **Options > General > Kofax Express Language**.

Install export connector to use with Kofax TotalAgility

Use this procedure to install and set up your export connector to use with Kofax TotalAgility.

i Before starting the procedure, make sure that you have created a process with an Export activity in Kofax TotalAgility. The export connector will be associated with a document type within the process.

1. Copy the product files from the installation media to the workstations where you plan to use the export connector.
2. In the **Kofax TotalAgility** program folder, select **Kofax Export Connector**. The **Kofax TotalAgility Export Connector Configuration** utility appears.
3. On the **Export Connector Configuration** screen, click **Manage**.
4. On the **Export Connectors - Manage** screen, click the **Add** icon to add a new export connector. The **Export Connectors - Add** window appears.
5. Navigate to your export connector installation files, select **Setup.msi**, and click **Open**. The export connector installer appears.
6. Run the installer.
 - If Kofax Export Connector 8.5.0 for Microsoft SharePoint is detected, you are prompted to upgrade to the latest version. After you click **OK**, the upgrade is performed. In this scenario, existing export connector settings are preserved for use with the new version.
 - If Kofax Export Connector 8.4.0 for Microsoft SharePoint or earlier is currently installed, we recommend that you uninstall it before installing Kofax Export Connector 8.6.0 for Microsoft SharePoint. Also, you may want to note the current settings for reference after installation.
7. Verify that **Microsoft SharePoint** is listed in the **Export Connectors - Manage** screen, and click **Close**.

Select the language

To change the language for Kofax Export Connector for Microsoft SharePoint, update the operating system language. The change goes into effect after you restart both Kofax TotalAgility and the export connector. For details on changing the operating system language, refer to your Microsoft documentation.

i If the selected language is not supported for Kofax Export Connector for Microsoft SharePoint, English is used.

Chapter 2

Set up the export connector

This section gives instructions for accessing the export connector setup window for [Kofax Capture](#), [Kofax TotalAgility](#), or [Kofax Express](#).

To export to a Microsoft SharePoint server, the logged-in user must have the following:

- Valid Microsoft SharePoint user name and password
- Permissions to create and modify folders
- Permissions to connect to the Microsoft SharePoint repository

As another option, do the following if you are using OAuth authentication:

- Register an application with the Sites.Manage.All SharePoint permission in the Microsoft Azure Active Directory.
- Collect the Application ID, Tenant ID, and Certificate Thumbprint from the Microsoft Azure page.

If necessary, contact your administrator for assistance.

Use the setup window to specify export settings to control how documents, folders, and other information are exported to the Microsoft SharePoint repository.


For details about individual settings on the **Setup** tabs, see the online help, which is available from the **Export Setup** screen for the export connector.

Use Kofax Capture to set up the export connector


Once you have associated a document class with a batch class in Kofax Capture, set up the export connector for exporting your images, Kofax PDF documents, eDocuments, and index data.

1. Install the export connector according to the instructions in [Install export connector to use with Kofax Capture or Kofax Express](#).
2. Start the Kofax Capture Administration module.
3. On the **Definitions** panel, click the **Batch** tab.
4. Select a batch class and expand it to view the associated document classes.
5. Right-click the applicable document class to open a context menu, and click **Export Connectors**.
The **Export Connectors** window appears.
6. On the **Available Export Connectors** list, select **Microsoft SharePoint** and click **Add**.
The **SharePoint Login Information** window appears.
7. Select **Credentials of the current user** to authenticate with your current Windows login account. Then continue with step 11 forward.


8. On the **SharePoint Login Information** window, make sure that the **Site URL** is provided.
9. Select **Custom credentials** if you log in with your Microsoft SharePoint account. To do so, provide the following information:
 - **User Name:** Enter your Microsoft SharePoint login name.
 - **Password:** Enter your Microsoft SharePoint account password. The password is case-sensitive.
 - **Domain:** Enter the Microsoft domain name.

 The login information is used to log in to the Microsoft SharePoint repository. This information is saved and used during export. The domain name is only used when a different Microsoft SharePoint domain is needed. If you are on the same domain as Microsoft SharePoint, you can leave this option blank.

- **ADFS:** Enter the ADFS server name.
- **Realms:** Enter the name of the Relying Party Trust Identifier configured in ADFS.

 ADFS and Realms are required parameters if ADFS is used with SharePoint On-Premise.

10. Select **Use OAuth authentication** to sign in with your Microsoft account. For information on how to configure OAuth authentication, see [Use OAuth authentication](#).
11. To prompt for a user ID and password if the export connector is not able to log in to Microsoft SharePoint at export time, select the **If unable to log in during export, prompt for valid login information** check box.
 - If selected, and a problem with logging in to the export connector occurs, the **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 process fails. With Kofax Capture, the batch is routed to the **Quality Control** module.
 - If not selected, and problems occur when logging in to the export connector, the **SharePoint Login Information** window does not display during export and the export process fails. With Kofax Capture, the batch is routed to the **Quality Control** module.

 Do not select this check box if you plan to run **Export** as a service, or if you plan to run the **Export** process during off-hours. The **SharePoint Login Information** window requires a user response (or operator intervention).

12. Click **OK**.
The export connector setup window appears. See [Setup options](#).
13. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
14. When you finish with the setup window, click **OK**.

Use Kofax TotalAgility to set up the export connector


1. Install the export connector according to the instructions in [Install export connector to use with Kofax TotalAgility](#).

2. On the **Export Connector Configuration** screen, click **Setup**.
3. On the **Export Connectors - Setup** screen, select the process to use for exporting document types to Microsoft SharePoint.
4. Select a document type to associate with the selected process, and click **Add**.
5. Click **Connectors**.
6. On the next screen, on the **Available Export Connectors** list, select **Microsoft SharePoint** and click **Add**.


Your selection is moved to the **Assigned Export Connectors** list.

The **SharePoint Login Information** window appears.


7. Select **Credentials of the current user** if you want to authenticate with your current Windows login account. Then continue with step 11 forward.
8. On the **SharePoint Login Information** window, make sure that the **Site URL** is provided.
9. Select **Custom credentials** if you log in with your Microsoft SharePoint account. To do so, provide the following information:
 - **User Name:** Enter your Microsoft SharePoint login name.
 - **Password:** Enter your Microsoft SharePoint account password. The password is case-sensitive.
 - **Domain:** Enter the Microsoft domain name.

 The login information is used to log in to the Microsoft SharePoint repository. This information is saved and used during export. The domain name is only used when a different Microsoft SharePoint domain is needed. If you are on the same domain as Microsoft SharePoint, you can leave this option blank.

- **ADFS:** Enter the ADFS server name.
- **Realms:** Enter the name of the Relying Party Trust Identifier configured in ADFS.

 ADFS and Realms are required parameters if ADFS is used with SharePoint On-Premise.


10. Select **Use OAuth authentication** to sign in with your Microsoft account. For information on how to configure OAuth authentication, see [Use OAuth authentication](#).
11. To prompt for a user ID and password if the export connector is not able to log in to Microsoft SharePoint at export time, select the **If unable to log in during export, prompt for valid login information** check box.
 - If selected, and a problem with logging in to the export connector occurs, the **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 process fails.
 - If not selected, and problems occur when logging in to the export connector, the **SharePoint Login Information** window does not display during export and the export process fails.

 Do not select this check box if you plan to run **Export** as a service, or if you plan to run the **Export** process during off-hours. The **SharePoint Login Information** window requires a user response (or operator intervention).


12. Click **OK**.
The export connector setup window appears. See [Setup options](#).
13. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
14. When you finish with the setup window, click **OK**.

Use Kofax Express to set up the export connector

1. Install the export connector according to the instructions in [Install export connector to use with Kofax Capture or Kofax Express](#).
2. Start Kofax Express.
3. On the **Job Setup** tab, in the **Export** group, on the **Connector** list, select **Microsoft SharePoint**.
4. Click the setup tool.
The **SharePoint Login Information** window appears.
5. Select **Credentials of the current user** if you want to authenticate with your current Windows login account. Then click **OK** and continue with step 9 forward.
6. On the **SharePoint Login Information** window, make sure that the **Site URL** is provided.
7. Select **Custom credentials** if you log in with your Microsoft SharePoint account. To do so, provide the following information:
 - **User Name:** Enter your Microsoft SharePoint login name.
 - **Password:** Enter your Microsoft SharePoint account password. The password is case-sensitive.
 - **Domain:** Enter the Microsoft domain name.

 The login information is used to log in to the Microsoft SharePoint repository. This information is saved and used during export. The domain name is only used when a different Microsoft SharePoint domain is needed. If you are on the same domain as Microsoft SharePoint, you can leave this option blank.

- **ADFS:** Enter the ADFS server name.
- **Realms:** Enter the name of the Relying Party Trust Identifier configured in ADFS.

 ADFS and Realms are required parameters if ADFS is used with SharePoint On-Premise.

8. Select **Use OAuth authentication** to sign in with your Microsoft account. For information on how to configure OAuth authentication, see [Use OAuth authentication](#).
9. To prompt for a user ID and password if the export connector is not able to log in to Microsoft SharePoint at export time, select the **If unable to log in during export, prompt for valid login information** check box.
 - If selected, and a problem with logging in to the export connector occurs, the **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 process fails. With Kofax Capture, the batch is routed to the Quality Control module.

- If not selected, and problems occur when logging in to the export connector, the **SharePoint Login Information** window is not displayed during export and the export process fails. With Kofax Capture, the batch is routed to the Quality Control module.

i Do not select this check box if you plan to run **Export** as a service, or if you plan to run the **Export** process during off-hours. The **SharePoint Login Information** window requires a user response (or operator intervention).

10. Click **OK**.

The export connector setup window appears. See [Setup options](#).

11. In the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.

12. When you finish with the setup window, click **OK**.

Use OAuth authentication

This section explains how to enable user authentication with OAuth in Kofax Export Connector for Microsoft SharePoint, which is configured in the **SharePoint Login Information** window. For information on the steps that you need to follow before configuring the settings in this window, see [Use Kofax Capture to set up the export connector](#), [Use Kofax TotalAgility to set up the export connector](#), or [Use Kofax Express to set up the export connector](#), respectively.

To use OAuth authentication, prepare the following information:

- Server certificate in CER file format and client certificate in PFX file format. These certificates can be a self-signed or a paid certificate. You can refer to your Microsoft documentation to get the instructions on how to obtain a new certificate.
- An application with the Sites.Manage.All SharePoint permission in the Microsoft Azure Active Directory.
- Application ID, Tenant ID, and Certificate Thumbprint. You can collect this information from the Microsoft Azure page after registering an application in the Microsoft Azure Active Directory.
 - **Application ID:** Copy the value of **Application (client) ID** from the **Overview > Essentials** section for your application.
 - **Tenant ID:** Copy the value of **Directory (tenant) ID** from the **Overview > Essentials** section for your application.
 - **Certificate Thumbprint:** Copy the value of **Thumbprint** from the **Manage > Certificates & secrets > Certificates** section for your application.

After obtaining the required information, follow the steps below to use OAuth authentication:

- 1.** On the **SharePoint Login Information** window, make sure that the **Site URL** is provided.
Example: `https://test.sharepoint.com`
- 2.** Select **Use OAuth authentication** and click the **Configuration** button.
The **OAuth Configuration** dialog box appears.
- 3.** Fill in the Application ID, Tenant ID, and Certificate Thumbprint fields in the **OAuth Configuration** dialog box.

4. Click **Save**.
The **OAuth Configuration** dialog box is closed.
5. On the **SharePoint Login Information** window, click **OK**.
If the login is successful, the **Microsoft SharePoint Export Connector Setup** window appears. For more information on this window, see [Setup options](#).
6. Configure the settings on each tab. Click **Help** on any tab for details about individual settings.
7. Click **OK** to complete your setup.

Setup options

This table lists the setup options available with this export connector. Details about individual settings are available from the [online help](#).

Location	Description
Destination Settings tab	Specifies the root destination and an optional folder destination to be used for export.
Export Root Destination window	Specifies a SharePoint destination.
Folders and Document Sets tab	Supports adding and deleting folder structures. Specifies a SharePoint content type that displays its associated SharePoint columns. You can link Kofax Mappings, or provide static text to specific SharePoint columns of the folder. 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.
Document Settings tab	Specifies a SharePoint content type that displays its associated SharePoint columns. You can link Kofax Mappings, or provide static text to specific SharePoint columns of the folder. 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.
Image Settings tab	Specifies an image format for your exported images, and specifies whether to export OCR full text files with your document.
General Settings tab	Specifies an export working folder as the temporary storage location to use at export time, whether to skip the first page of each document, and other preferences. <div style="background-color: #e1f5fe; padding: 5px; border: 1px solid #ccc;"> <p>i See the next section for details about how settings from an existing configuration file are applied to the General tab in this version of the export connector.</p> </div>

Location	Description
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.

General settings - backward compatibility

In previous versions of this export connector, the following settings could be managed in an optional configuration file, and they were applied globally to all document classes/types.

- **RequestTimeout**
- **MaxRetries**
- **WriteRepositoryId**

These and other configuration settings were maintained in a manually created XML file located here:

Kofax Capture: <KCServerPath>\Config\KEC-SharePoint.xml

Kofax TotalAgility and Kofax Express: %APPDATA%\Kofax\KEC-SharePoint\Config.xml

If both of the preceding paths exist, the first one takes precedence.

In this version of the export connector, the settings listed above are available on the **General** tab to assign on a per document class/type basis during export connector setup. When upgrading to Kofax Export Connector 8.6.0 for Microsoft SharePoint:

- If the values for the settings above are specified in an existing configuration file, they are applied as default values in the export connector setup window.
- If a configuration file does not exist, the values from the previous export connector setup window are applied.

With a new installation of Kofax Export Connector 8.6.0 for Microsoft SharePoint, the new default values for the export connector setup window are applied.

Caching

Caching is used to minimize round trips to SharePoint. This cache is stored in memory and is not persistent. You can specify individual limits for Managed Metadata term sets, Enterprise Keywords terms, and lookup results via a new section (in one of the XML files referenced in the preceding section) in the <SharePoint> element in the ACConfig.xml file for Kofax Capture. You can also specify expiration times (in minutes) for each individual value. Unused values will be removed from the cache when the expiration time has elapsed. Each time a value is used, the expiration timer is reset to zero. Sample:

```
<TermsetCache>
<MaxValues>100</MaxValues>
<Lifetime>60</Lifetime>
</TermsetCache>
<TermsCache>
<MaxValues>10000</MaxValues>
<Lifetime>60</Lifetime>
</TermsCache>
<LookupCache>
```

```
<MaxValues>1000</MaxValues>  
<Lifetime>60</Lifetime>  
</LookupCache>
```

Caching can be disabled by setting all the <MaxValues> to zero.

During export, the cache is always checked first. If a matching value is not found, the SharePoint server is queried. If the value is found on the server, it is stored in the cache. If the cache threshold is reached, the least used recent items are removed from the cache to make room for new values.

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.

i 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 [Install the export connector](#) for the installation instructions. When you install the Kofax Export Connector for Microsoft SharePoint export connector, you will install the required components referenced in the source code.

i 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.

Export connector details

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 for 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 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>

Chapter 3

Remove the Export Connector

Use the following procedures to remove the Export Connector from [Kofax Capture](#), [Kofax Express](#), or [Kofax TotalAgility](#) and then from your computer. You can also [repair](#) the Export Connector if necessary.

Remove the Export Connector from Kofax Capture

Use the following procedures to remove the Export Connector from Kofax Capture and from your computer.

Remove the Export Connector from a batch class

1. In the Kofax Capture **Administration** module, on the **Batch** tab, expand the batch class to view associated document classes.
2. Right-click the applicable document class, and select **Export Connectors**.
3. On the **Assigned Export Connectors** list, select the export connector and click **Remove**.

Remove the Export Connector from the Export Connector Manager

1. In the Kofax Capture **Administration** module, do one of the following:
 - For Kofax Capture 10.0 or higher: On the **Tools** tab, in the **System** group, click **Export Connectors**.
 - For Kofax Capture 9: On the **Tools** menu, select **Export Connector Manager**.
2. In the **Export Connector Manager** window, select the Export Connector, and click **Remove**.

Remove the Export Connector from Kofax Express

Before removing the Export Connector from your computer, remove it from Kofax Express.

Remove the Export Connector from a job

1. On the **Job Setup** tab, in the **Export** group, verify that the connector is not associated with any unprocessed jobs.
2. If necessary, assign another connector to any unprocessed jobs.

Remove the export connector registration

1. Verify that you have completed processing for all jobs that require the Export Connector. You cannot unregister a connector that is assigned to an existing job.
2. On the Kofax menu, click **Options**.
The **Options** window appears.
3. On the **Options** window, click **Export Connectors**.
4. On the **Export Connectors** list, select the name of the connector to unregister, and click **Remove**.
The **Export Connectors** list is refreshed, and the Export Connector is no longer available for use with Kofax Express.

Remove the Export Connector from Kofax TotalAgility

Before removing the Export Connector from your computer, use the Kofax TotalAgility Export Connector Configuration utility to unassign it from the associated document type and process.

1. In the Kofax TotalAgility program folder, select **Kofax Export Connector**.
The Kofax TotalAgility Export Connector Configuration utility appears.
2. In the **Export Connector Configuration** screen, click **Setup**.
3. In the next screen, on the **Assigned Export Connectors** list, select the Export Connector name, click **Remove**, and click **Save**.
The document type is unassigned from the Export Connector.
4. In the **Export Connectors - Setup** screen, on the **Select Process** list, select the process associated with the document type that was exported with the connector.
5. On the **Assigned Document Types** list, select the document type assigned to the selected process, click **Remove**, click **Save**, and then click **Close**.
The process is unassigned from the document type.
6. In the **Export Connector Configuration** screen, click **Manage**.
7. Select the Export Connector name, click the **Delete** button, and then click **Close**.

Remove the Export Connector from the computer

Before removing the Export Connector from your computer, remember to remove it from [Kofax Capture](#), [Kofax Express](#), and [Kofax TotalAgility](#), as applicable.

You can use the **Control Panel** options to remove the Export Connector, or you can follow these instructions:

1. Run the .msi file that you used to install the Export Connector.
When the existing installation is detected, the **Program Maintenance** window appears.
2. Select **Remove**, and then click **Next**.
3. Follow the on-screen instructions to remove the Export Connector.

When the removal is complete, a message appears to indicate the Export Connector was successfully removed.

Repair the Export Connector

You can use the repair process to replace missing, renamed, or deleted export connector files.

1. Run the .msi file that you used to install the Export Connector.
When the existing installation is detected, the **Program Maintenance** window appears.
2. Select **Repair**, and then click **Next**.
3. Follow the on-screen instructions to repair the Export Connector.
When complete, a message appears to indicate the Export Connector was successfully repaired.