

EdgeXperience Capture Service

Connector User's Guide

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Introduction

This User's Guide describes how to set up and use the EdgeXperience Capture Service connectors. It is aimed at system administrators and end users that will set up and use the EdgeXperience Capture Service connectors to scan and upload documents directly to a backend server or cloud service.

Trademarks

Besides the software authored by the product developer (PFU Limited), this product contains open source software created by third parties. For details concerning the conditions of the licenses for the open source software, refer to the window that appears by clicking [About] in the left menu in the administrator window (on the web) of EdgeXperience Capture Service. EdgeXperience is registered trademarks or trademarks of PFU Limited in Japan. Other company names and product names are the registered trademarks or trademarks of the respective companies.

Manufacturer

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Use in High-Safety Applications

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Abbreviations Used in This Manual

The following abbreviations are used in this manual.

Name	Indication
Amazon Simple Storage Service	Amazon S3
Microsoft® Azure Blob Storage	Azure Blob
Microsoft® OneDrive Microsoft® OneDrive for Business	OneDrive
Microsoft® SharePoint Online	SharePoint (*1)
Microsoft® Office 365	Office 365
Windows Server® 2016 Standard	Windows Server 2016

Name	Indication
Windows Server® 2019 Standard	Windows Server 2019
Windows Server® 2022 Standard	Windows Server 2022

*1 SharePoint Server is not included.

Arrow Symbols in This Manual

Right-arrow symbols (→) are used to separate icons or menu options which should be selected in succession.

Example: Click the [Start] menu → [Control Panel].

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Overview

This section explains about the features of EdgeXperience Capture Service connectors and shows how administrators and users can set up the connectors.

Main Function

The following shows the main function of EdgeXperience Capture Service connectors.

EdgeXperience Capture Service Connectors are a set of Azure-based functions and services that help with configuring destinations for scanned documents and uploading them.

- **Image Process Connector**
Performing additional image processing on scanned documents. The connector can be used together with the Image Release Connectors.
- **Image Release Connector**
Selecting a corresponding connector as a save destination allows users to scan and upload documents, as well as index files generated during scan to supported destinations. In addition, scanned documents can be sent as email attachments to specified recipients. If users are registered users of 3rd party cloud fax services, scanned documents can also be faxed to specified recipients.
The folder sync Connector allows for scanned documents from EdgeXperience Capture Service to be downloaded to a selected local client machine configured in the connector.

About Connector Settings

There are three levels of connector settings – Tenant level, User or Scanner level, and Job level. Some connectors have settings that can be specified at all levels, while some connectors may not have settings at certain levels.

ATTENTION

Some connectors have the same parameters at different levels. In this case, the connectors adopt the values in the order of “Job level > User level or Scanner level > Tenant level”.

To be specific, the connectors follow the Job level settings if specified regardless of what have been specified in User, Scanner or Tenant level; follow the User or Scanner level settings if Job level settings are not available or specified regardless of what have been specified in Tenant level; follow the Tenant level settings if both Job and User or Scanner level settings are not available or specified.

Tenant level

The tenant level settings are specified by an administrator. The administrator selects the [Connector] window in the EdgeXperience Capture Service and edits the connector settings under [Connector Settings]. The Tenant level settings are shared by all users in the same tenant.

[Connector] → [Settings] → [Connector Settings]

User or Scanner level

The user or scanner level settings are specified by an administrator or a user, and can be specified in the [User] window or [Scanner] window, depending on the Authentication Method configured by a super administrator.

For details on Authentication Method, refer to [*EdgeXperience Capture Service User's Guide for SuperAdmin*](#).

When [Username/Password or NFC] or [User Code/PIN or NFC] is selected for the preferred [Authentication Method], user level settings can be specified in the [User] window, although scanner level settings are unavailable. An administrator or a user selects [User] window in the EdgeXperience Capture Service, creates or selects a user from the user list, and then edits the connector settings under [Connector Settings]. The User level settings are only valid for the specific user.

[User] → [User List] → [Create a new user] → [Connector Settings]

[User] → [User List] → [Edit a user] → [Connector Settings]

When [Scanner] is selected for the preferred [Authentication Method], the user level settings are specified in the [Scanner] window and the user level settings are not configurable. An administrator selects [Scanner] window in the EdgeXperience Capture Service, selects a scanner from the scanner list, and then edits the connector settings under [Connector Settings]. The User level settings are only valid for the selected scanner. A user is not able to select [Scanner] window and edit the scanner settings.

[Scanner] → [Scanner List] → [Edit Scanner Information] → [Connector Settings]

Job level

The job level settings are specified by an administrator. The administrator selects [Job] window in the EdgeXperience Capture Service, creates or selects a job from the job list, and then edit the connector settings under [Save Destination Settings].

[Job] → [Job List] → [Create a new job] → [Save Destination Settings] → [Save Destination]

[Job] → [Job List] → [Edit job] → [Save Destination Settings] → [Save Destination]

Settings vary based on the connector. Some connectors require the user to perform an action – e.g., user login to get an OAuth token for SharePoint and OneDrive.

General Flow for Scanning with Connectors

The following shows the general flow to scan with EdgeXperience Capture Service connectors.

Administrator Flow	<ul style="list-style-type: none"> ● Set up Connector Settings ● Set up Users and configure User or Scanner level settings ● Set up Jobs and configure Job level settings ● Set up Job Groups <ul style="list-style-type: none"> - Assign Jobs to Job Groups - Assign Users or Scanners to Job Groups ● Set up client application for the folder sync Connector ● Set up Generic Connector
User Flow	<ul style="list-style-type: none"> ● Set up Connector Settings <ul style="list-style-type: none"> - Configure User level settings ● Run jobs

Administrator Flow

The first step in the flow is for an administrator to set up the users and connectors needed. For details on setting up users and how they authenticate to the system, refer to [EdgeXperience Capture Service User's Guide for SuperAdmin](#) and [EdgeXperience Capture Service User's Guide for AdminUser](#).

In addition to setting up users, the administrator must set up the EdgeXperience Capture Service connectors in order to upload documents to the specified destinations. There are three levels of connector settings – Tenant level, User or Scanner level, and Job level. The next sections describe the various connector settings, at all levels. In the first step, the administrator should set up the Tenant level and User or Scanner level settings.

After connectors are set up, the administrator must set up jobs and job groups. For details on setting up jobs and job groups, refer to [EdgeXperience Capture Service User's Guide for AdminUser](#).

Folder sync connector client application setup

The folder sync connector requires a client application to be downloaded from the download link found in the Connector or Job window.

System requirements

- Software
 - Operating system
 - Windows Server 2016
 - Windows Server 2019
 - Windows Server 2022

ATTENTION

To connect the folder sync client application to EdgeXperience Capture Service, the following sites should be allowed to run scripts. Please add the sites to Trusted sites or custom security level on Internet Options of Internet Explorer.

- <https://capedgeprdus.b2clogin.com>
- <https://login.live.com>
- <https://login.microsoftonline.com>
- <https://aadcdn.msauth.net>
- <https://aadcdn.msftauth.net>

- .NET Framework 4.7.2 or later

Client application setup flow

- Download client application from download link
- Install client application on target machine
 - Select folder to install application
- Login client application
 - Use EdgeXperience login ID and Tenant Code
- Configure client application
 - Configure Save To folder
 - Configure optional user or scanner specific save to folder
- Target client machine selection
 - Select the client target machine from a list of registered client machine using the obtain or re-obtain button
- Setup parameters under Connector or Job settings
 - Setup parameters described in the folder sync connector section of this document

Generic Connector setup

The Generic Connector requires to activate the product certificate that is provided by the connector developer. For the product certificate of Generic Connector, contact the distributor/dealer from whom you purchased the product.

User Flow

After administrator setup, a user accesses the EdgeXperience Capture Service application and set up connector parameters. This is an optional step for most connectors. Some connectors (like the OneDrive Connector (Authorization Code) and SharePoint connector (Authorization Code)) require users to perform some actions in order for the connectors to function properly. The parameters defined by a user apply to that user and any corresponding parameters specified by the administrator at the tenant level will be ignored. Refer to the next section for connector settings in User level.

After the setup, a user can scan operation. In detail, refer to [EdgeXperience Capture Service User's Guide](#).

Image Process Connector Configuration

This section explains the settings associated with each image process connector and how they are configured.

OCR Connector

The OCR Connector extracts Text information in scanned documents by connecting to Azure Cognitive Services by Microsoft® and passes the result of extracted text information through a connector such as SharePoint, Azure Blob Connector and others. The following sections describe the settings to be specified at Tenant, User and Job levels.

HINT

- The OCR Service of Microsoft® Azure Cognitive Services that EdgeXperience Capture Service supports has the requirements for input image files. For the latest information, refer to the Computer Vision API document of Microsoft Azure Cognitive Services.
- When OCR failed, the OCR can be skipped and release the images. For details, refer to [*EdgeXperience Capture Service User's Guide for AdminUser*](#).

ATTENTION

The OCR Connector supports to convert into a searchable PDF file for the English language only. For other languages, the searchable PDF file may have some garbled character.

Required Settings

Subscription Key, Endpoint are required to connect with the OCR Service.

To extract Text Information on scanned document, EdgeXperience Capture Service will send the scanned document to an OCR Service and then obtain the extracted result from it. The OCR Connector connects with Microsoft® Azure Cognitive Services to extract Text Information on scanned documents. The user must subscribe to the Azure Cognitive Services. Once subscribed to the service, the subscription key and the endpoint must be used to access the OCR Service. It is strongly recommended that this subscription key should be the paid tier in order to ensure a consistent user experience (OCR Connector doesn't support the free tier of Microsoft® Azure Cognitive Services).

Tenant level settings under [Connector] window

- Subscription key
A subscription key that is provided by OCR Service.
- Endpoint
An endpoint that is provided by OCR Service.

User level settings under [User] window or Scanner level settings under [Scanner] window

There is no [User] or [Scanner] level setting for the OCR Connector.

Job level settings under [Job] window

- Convert to Searchable PDF
This option is used to convert the scanned document to a searchable PDF.
- Output Metadata
This option is to output metadata. The file format follows the next option.
- File Format
Metadata file format. Selected from the dropdown menu.

ATTENTION

The OCR Connector cannot be selected when specifying on the Job window the following image type and TIFF as the output file format.

Unsupported Image Types: Color, Auto Color, Paper Length detection

Image Release Connector Configuration

This section explains the settings associated with each image release connector and how they are configured.

Amazon S3 Connector

The Amazon S3 connector uploads documents to a folder under a bucket in Amazon S3 storage system. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

Access Key ID, Secret Key, Region and Bucket Name are required.

To access Amazon S3 storage, an Access Key ID and a Secret Key must be obtained from the Amazon S3 system. If the Access Key ID and the Secret Key are used for all users in the same tenant, they should be specified in the [Connector] window as Tenant level settings.

If each user must have their own access to the Amazon S3 storage, a separate Access Key ID and Secret Key can be specified for each user in the [User] window as User level settings.

An Access Key ID and Secret Key can also be specified at the Job level in the [Job] window.

A Region and a Bucket Name are also required to upload a document. These can be specified at the Tenant level for use by all users in the current subscription. If separate Region and Bucket Names are specified at the Job level, the Tenant level settings will be ignored.

Tenant level settings under [Connector] window

- Access Key ID
The Access Key ID value from the Amazon S3 account applies to all users in the tenant. The setting here will be ignored if the Access Key ID is specified at the User or Job level.
- Secret Key
The Secret Key for the Amazon S3 account. The setting here will be ignored if Secret Key is specified at the User or Job level.
- Region
The administrator should select the valid region for the Amazon S3 account. If the selected region is not valid, the document may be rejected for upload by Amazon S3.
- Bucket Name
The name of the bucket under which the document will be stored. If the specified bucket doesn't exist in the selected region, the document may be rejected for upload by Amazon S3.

HINT

The [Preferences] window will prompt for "Required Item" when **Connection String, Storage Account Name or Container Name** is not configured. For those who do not use Azure Blob Storage Connector, these fields are not required to be populated.

User level settings under [User] window or Scanner level settings under [Scanner] window

- Access Key ID
The Access Key ID value from the user's Amazon S3 account. If the ID is specified here, the setting in Tenant level will be ignored.
- Secret Key
The Secret Key for the user's Amazon S3 account. If the key is specified here, the setting in Tenant level will be ignored.

Job level settings under [Job] window

- **Type**
Connector type. Select Amazon S3 Connector from dropdown.
- **Access Key ID**
Access Key ID for this job. If it's specified here, the setting in the User and Tenant level will be ignored.
- **Secret Key**
Secret Key for this job. If it's specified here, the setting in the User and Tenant level will be ignored.
- **Region**
Region for this job. If it's specified here, the setting in the Tenant level will be ignored.
- **Bucket Name**
The name of the bucket for this job. If it's specified here, the setting in the Tenant level will be ignored.
- **Target Folder**
Folder path where documents will be saved. If not specified, document will be stored at root level.
Example: Test/Subfolder

HINT

- The folder path should NOT begin with a '/'.
• If the folder does not exist, it is created.
• If the same file name exists in the folder, the file is renamed.

- **Additional Parameters**
Refer to [Appendix](#) for specifiable parameters.

Azure Blob Connector

The Azure Blob connector uploads scanned documents to a specified folder location in an Azure Storage account. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

Connection Type, Connection String, Storage Account Name, and Container Name are required.

Azure Blob Storage requires authentication to upload documents to a selected storage account. The storage account can be connected to by specifying a connection string, a shared access key or a shared access signature.

The Connection Type can be specified in the tenant level settings by choosing one of the three options in the dropdown.

Based on the Connection Type, a Connection Value is specified (a connection string, a shared access key value or a SAS token, a SAS connection string or a SAS Blob URL) to connect securely to that account.

A Storage Account Name and a Container Name round up the settings at the Tenant level.

Tenant level settings under [Connector] window

- **Connection Type**
Connection String, Access Key or Shared Access Signature can be selected from dropdown list. Connection String is selected by default. The setting here will be ignored if the Access Key ID is specified at the Job level or User level as an additional parameter.

- **Connection String**

Specify based on the Connection Type setting above. If Connection String is selected, enter the Azure Blob Connection String; if Access Key, enter Shared Access Key; if Shared Access Signature (SAS), enter SAS token or SAS Connection String or SAS Blob URL.

ATTENTION

SAS for Azure Blob expires in certain period. Please enter a new SAS before expiration to prevent errors.

- **Storage Account Name**

Name of the storage account where documents will be stored.

- **Container Name**

Name of the container within the storage account where documents will be stored.

User level settings under [User] window or Scanner level settings under [Scanner] window

There are no User level or Scanner level settings for the Azure Blob Storage Connector.

Job level settings under [Job] window

- **Type**

Connector type. Select Azure Blob Connector from dropdown.

- **Target Folder**

Folder where documents will be saved. If not specified, document is stored at the root level.

Example: Test/Subfolder

HINT

- The folder path should NOT begin with a '/'.
 - If the folder does not exist, it is created.
 - If the same file name exists in the folder, the file is renamed.

- **Additional Parameters**

Connection Type, Connection String, Storage Account Name, and Container Name can be configured by additional parameters. If specified here, the settings at the Tenant level will be ignored.

Refer to [Appendix](#) for detailed format.

Email Connector

The email connector sends the scanned document(s) to the specified email address(es) using an SMTP email server. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

SMTP Email Server, SMTP Server Port, Use SSL, Source Email Address, Display Name and Destination Email Address are required.

Email Server Username and Email Server Password are required if the user's SMTP Email Server requires authentication.

The SMTP Email Server, the SMTP Port Number, user credentials (Email Server Username and Email Server Password) to authenticate to the SMTP server and SSL requirement (Use SSL) must

be specified at the Tenant level.

The address(es) of the email recipients (Destination Email Address) can be specified as a Job parameter when creating a scan job or as a meta-data entered on the scanner during scan time.

ATTENTION

The Email Connector will not work if the SMTP server requires the client application or source where the email originates to be authenticated with the SMTP server.

Tenant level settings under [Connector] window

- SMTP Email Server
SMTP Email server to use with an email relay.
- SMTP Port Number
SMTP Email server port.

ATTENTION

TLS/STARTTLS are the only protocols that are supported.

- Use SSL
Specify Yes or No. Choose from dropdown.

ATTENTION

Email over SSL (Default port 465) is not supported.

- Email Server Username
Username to log into SMTP server. Required if the SMTP server requires authentication.
- Email Server Password
Password to log into SMTP server. Required if the SMTP server requires authentication.

HINT

[Preferences] window will prompt for “Required Item” when **SMTP Email Server** or **SMTP Port Number** is not configured. If the email connector is not being used, these fields are not required to be filled in.

User level settings under [User] window or Scanner level settings under [Scanner] window

- Source Email Address
Sender's Email address. Required to relay email by most SMTP servers.
- Display Name on Email
Sender's display name. Required to relay email by many SMTP servers.
- Email Server Username
Username to log into SMTP server; required if SMTP server requires authentication.
- Email Server Password
Password to log into SMTP server; required if SMTP server requires authentication.

HINT

Some SMTP servers (e.g. Office 365) require the authentication username to be the source email address in order to relay the email. In this case, user credentials are required to be entered here, and the credentials at the Tenant level will be ignored.

HINT

[Edit a user] or [Edit Scanner Information] window will prompt for “Required Item” when **Source Email Address** or **Display Name on Email** is not configured. When not using the Email Connector, these fields are not required to fill in.

Job level settings under [Job] window

- **Type**
Connector type. Select Email Connector from dropdown.
- **Destination Email Address**
Receiver’s Email address. Multiple recipients can be entered, but must be separated by semi-colon (;).
- **Scanner Entry Destination Email Address metadata fieldname**
Name of metadata field on the scanner touch panel where users enter the receiver’s Email address during scan. In order to use this metadata field, the [Input meta data from a scanner] Check box should be checked and specify the same field name.

Input meta data from a scanner

Field Name:

HINT

Either **Destination Email Address** or **Scanner Entry Destination Email Address metadata fieldname** is required to determine the destination Email address. If both fields are entered, metadata entry from scanner will be used as destination Email address.

ATTENTION

The Email connector will only attach scanned documents with the email sent. Index file will NOT be included.

Fax Connector

The Fax Connector sends scanned documents through Email to any cloud (or on-premise) Fax server that accepts documents to be faxed via email. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

Email / FAX Server, SMTP Port Number, Use SSL, FAX Domain Name, FAX Sender Name, and FAX Number are required.

Email Server Username and **Email Server Password** are required if the user’s SMTP Email Server requires authentication.

The transmission of documents to an outbound Fax server requires an SMTP server, associated port number, a username and password, to log into the Email server. In addition, SSL/TLS/STARTTLS should be enabled as necessary. The documents are sent to the Fax server using the configured SMTP server.

The name of the cloud Fax domain to which the scanned documents are sent must be specified. Most cloud Fax systems require that the sender be a registered user of that domain. The Fax sender name that is registered on the cloud Fax domain must also be specified.

The Fax sender name can be specified at the Tenant level, User level and Job level. If it’s specified at the Job level, the settings at the User level and Tenant level will be ignored.

The Fax number to which the document(s) are sent can be specified as a Job parameter when creating a scan job or as a meta-data entered on the scanner during scan time.

ATTENTION

The FAX Connector will not work if the SMTP server requires the client application or the source where the email originates from to be authenticated with the SMTP server.

Tenant level settings under [Connector] window

- Email / FAX server
SMTP server to use to send documents.
- SMTP Port Number

ATTENTION

TLS/STARTTLS are the only protocols that are supported.

SMTP server port number.

- Use SSL
Specify Yes or No. Choose from dropdown.

ATTENTION

Email over SSL (Default port 465) is not supported.

- Email Server Username
Username for SMTP server login. Required if SMTP server requires user login.
- Email Server Password
Password for SMTP server login. Required if SMTP server requires user login.
- FAX Domain Name
Email domain name to be appended to fax number (e.g. faxthroughmail.com).
- FAX Sender Name
Name of the user sending the fax. The user must be a registered user to access the cloud Fax server. The username may be in email form if the user registered in this way with the cloud Fax

HINT

[Preferences] window will prompt for "Required Item" when **Email / FAX Server**, **SMTP Port Number** or **FAX Domain Name** is not configured. For those who do not use FAX Connector, these fields are not required to fill in.

server.

User level settings under [User] window or Scanner level settings under [Scanner] window

- FAX Sender Name
Name of the user sending the Fax. If the name is specified here, the setting in Tenant level will be ignored.

Job level settings under [Job] window

- Type

Connector type. Select FAX Connector from dropdown.

- FAX Number

Fax number where documents will be sent.

HINT

Fax number is required to fax but [FAX Number] field is not required to fill in. By checking [Input meta data from a scanner] checkbox as below, user can enter Fax number by scanner entry on touch panel when they scan. User can also check [Input numerical characters only], which can help to reduce input errors.

Input meta data from a scanner

Field Name:

Input numerical characters only

- FAX Sender Name

Name of the user sending the Fax. If this is populated, the setting in the User and Tenant level will be ignored.

- Cover Text

Text message for cover sheet. If not specified, no cover sheet will be sent.

- Subject Line

Subject line for Fax message. If not populated, no subject will be specified.

folder sync Connector

The folder sync connector downloads scanned documents from EdgeXperience Capture Service to a local machine storage destination.

The connector application needs to be configured in the EdgeXperience Capture Service. In addition, the client application needs to be installed on the client machine.

Required Settings

Folder sync client machine is required from Obtain or Re-obtain under the Job or Preference level settings. **Rewrite**

The client machine selection is populated from a list of registered client machines registered to the user's tenant. Client machines must be downloaded from the download link on Connector or Job window and installed folder sync Connector Client Application on the client machine in order for the list to be populated for the client machine to be selectable from EdgeXperience Capture Service. Refer to [Appendix](#) or folder sync Connector Client Application. **Rewrite**

Tenant level settings under [Connector] window

- Folder sync client machine

Hit obtain or re-obtain to get a list of client machines that are registered. Select the client machine based on the machine name.

- Duplicate file action

Action to perform if target destination path contains files that would result in duplicate filenames.
Rename – Rename new file following Operating system's renaming convention for duplicate filenames.
Overwrite – Overwrite existing file with new file.

Job level settings under [Job] window

Job level settings are the same as Tenant Level settings with the addition of the following settings:

- Folder sync client machine

Hit obtain or re-obtain to get a list of client machines that are registered. Select the client machine based on the machine name.

- Target Folder

Subfolder where documents will be saved under the root folder configured in the client application. If not specified, documents are stored in the root folder configured in the client application.

Example: Test/Subfolder

HINT

- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

- Duplicate file action

Action to perform if target destination path contains files that would result in duplicate filenames. Select an action – Default parameter selection option. If this option is selected the tenant level action will be used.

Rename – Rename new file following Operating system's renaming convention for duplicate filenames.
Overwrite – Overwrite existing file with new file.

- Additional Parameters

Refer to [Appendix](#) for specifiable parameter.

Generic Connector

The Generic Connector allows the use of a connector developed to upload scanned documents to a specific custom destination. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

Product Certificate is required for activation.

The Generic Connector can use a developed connector within EdgeXperience Capture Service. The user must enter a certificate that is issued by the connector developer. This certificate is used to specify the connector in EdgeXperience Capture Service Database. The certificate can be updated if the user has received a new certificate from developer, but the old certificate can also be continued to be used in EdgeXperience Capture Service.

Token is required to obtain if the connector is using bearer token.

If the developed connector uses OAuth2 and bearer token to authenticate a user, the user must acquire an authorization token by logging into their specific site account from the [User] window. This authorization token is used to log the user into a specific site when uploading scanned documents. The authorization token has an expiration period, but the expiration date/time is extended if the user accesses their account through scanned documents upload (the access must happen before the token expires). If the token expires due to a prolonged period of inactivity, the user must re-login to acquire a new token.

HINT

Please contact technical support to determine if the connector is using bearer token.

Tenant level settings under [Connector] window

- Activation

Hit Activation or re-activate to enter a certificate that is provided from developer.

User level settings under [User] window or Scanner level settings under [Scanner] window

- Token

If the developed connector uses OAuth2, a user must log into their specific site account by clicking on the [Obtain] button. When the [Obtain] button is clicked, the Generic Connector Settings window is displayed. Selecting a connector in dropdown and clicking the [Web Login] button will launch a login screen from their site, from which the user must log in and allow the EdgeXperience Capture Service to upload scanned documents to their account. An authorization token obtained will be stored in the EdgeXperience Capture Service. This authorization token will be used to upload scanned documents on the user's behalf to a specified folder.

Job level settings under [Job] window

- **Type**
Connector type. Select Generic Connector from dropdown.
- **Connector**
Activated connector type. Select a connector from dropdown.
- **Target Folder**
Folder path where documents will be saved. If not specified, scanned documents will be stored at the root level.
Example: Test/Subfolder
- **ClientID for Client Credentials**
ClientID used when the connector is using Client Credentials. Leave blank If the connector is not using Client Credentials.
- **Client Secret for Client Credentials**
Client Secret used when the connector is using Client Credentials. Leave blank If the connector is not using Client Credentials.

HINT

Please contact technical support to determine if the connector is using Client Credentials.

- **Additional Parameters**
Refer to [Appendix](#) for specifiable parameter.

OneDrive Connector (Authorization Code)

The OneDrive Connector (Authorization Code) uploads scanned documents to a OneDrive folder. The following sections describe the settings to be specified at Tenant, User and Job levels.

HINT

To decide whether to use Authorization Code or Client Credentials, refer to the following:

- **Authorization Code:** User authentication. Before using this connector, authentication is required by each user. If you need to distinguish who created the file, please select this connector.
- **Client Credentials:** Server authentication. Before using this connector, admin consent is required. If you do not need to distinguish who created the file, please select this connector.

Required Settings

Token is required to be obtained for the connector to function correctly.

The OneDrive Connector (Authorization Code) uses OAuth2 to authenticate a user. The user must acquire an authorization token by logging into their OneDrive account from the [User] window. This authorization token is used to log the user into OneDrive at document upload time. The authorization token has a 60 day expiration period. The expiration date/time is extended if the user accesses their account through document uploads (the access must happen before the token expires). If the token expires due to a prolonged period of inactivity, the user must repeat the

process and login again to acquire a new token.

Tenant level settings under [Connector] window

There are no Tenant level settings for the OneDrive Connector (Authorization Code).

User level settings under [User] window or Scanner level settings under [Scanner] window

- Token

A user must log into their OneDrive account by clicking on the [Obtain] button and obtaining an authorization token which will be stored within the EdgeXperience Capture Service. This token will be used to upload documents on the user's behalf to a specified folder.

Clicking the [Obtain] button will launch a login screen from Microsoft, from which the user must log in and also allow the EdgeXperience Capture Service to upload documents to their account.

HINT

[Edit a User] or [Edit Scanner Information] window will prompt for "Required Item" when **Token** is not obtained. If not using the OneDrive Connector (Authorization Code), a token is not required to be obtained.

Job level settings under [Job] window

- Type

Connector type. Select OneDrive Connector (Authorization Code) from dropdown.

- Target Folder

Folder path where documents will be saved. If not specified, document will be stored at root level.

Example: Test/Subfolder

HINT

- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

ATTENTION

Shared folder is not supported for Target folder.

- Additional Parameters

Refer to [Appendix](#) for specifiable parameters.

OneDrive Connector (Client Credentials)

The OneDrive Connector (Client Credentials) uploads scanned documents to a OneDrive folder. The following sections describe the settings to be specified at Tenant, User and Job levels.

HINT

To decide whether to use Authorization Code or Client Credentials, refer to the following:

- Authorization Code: User authentication. Before using this connector, authentication is required by each user. If you need to distinguish who created the file, please select this connector.
- Client Credentials: Server authentication. Before using this connector, admin consent is required. If you do not need to distinguish who created the file, please select this connector.

Required Settings

Admin Consent is required to be obtained for the connector to function correctly.

The OneDrive Connector (Client Credentials) uses Microsoft Graph API and OAuth2 Client Credentials grant to access to the OneDrive. To get the access token for the API, tenant administrator's consent is needed in advance.

User principal name is required.

Tenant level settings under [Connector] window

- Admin Consent

A user must get administrator's consent before the OneDrive Connector (Client Credentials) can access to OneDrive using Client Credentials grant.

Clicking the [Obtain] button will launch a login screen from Microsoft, from which the tenant administrator must log in and also allow the EdgeXperience Capture Service to upload documents to their account.

User level settings under [User] window or Scanner level settings under [Scanner] window

- User principal name

Specify a username of OneDrive which is uploaded documents.

Job level settings under [Job] window

- Type

Connector type. Select OneDrive Connector (Client Credentials) from dropdown.

- Target Folder

Folder path where documents will be saved. If not specified, document will be stored at root level.

Example: Test/Subfolder

HINT

- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

ATTENTION

Shared folder is not supported for Target folder.

- Additional Parameters

Refer to [Appendix](#) for specifiable parameters.

SFTP Connector

The SFTP connector uploads scanned documents to a SFTP Server folder. The following sections describe the settings to be specified at Tenant, User and Job levels.

Required Settings

FTP Server address is required.

Username and **Password** are required if the user's SFTP Server requires Username Password authentication. In this authentication method, **Use Private Key** must be "No".

Private Key, Username for Private Key and **Passphrase for Private Key** are required if the user's FTP requires Private Key authentication. In this authentication method, **Use Private Key** must be "Yes".

Tenant level settings under [Connector] window

- FTP Server
Host name or IP address of FTP server to send scanned documents
- Port Number
SFTP Server port number. The port 22 as default value is specified if empty.
- Use Private Key
Specify Yes or No. Choose from dropdown.
- Username
Username for SFTP server login. It's required if Use Private Key is No.
- Password
Password for SFTP server login. It's required if Use Private Key is No.
- Private Key
Private Key for SFTP server login. It's required if Use Private Key is Yes.

HINT

Private Key must be OpenSSH (old PEM(Privacy-Enhanced Mail)-style*) format and new lines must be replaces with spaces.

*It can be created with ssh-keygen command. OpenSSH 7.8 or later requires "-m PEM" option to be specified.

- Username for Private Key
Username for SFTP server login. It's required if Use Private Key is Yes.
- Passphrase for Private Key
Passphrase for SFTP server login. It's required if Use Private Key is Yes.

ATTENTION

The Input boxes for SFTP Server limit UTF-8 character and maximum 4200 byte.

User level settings under [User] window or Scanner level settings under [Scanner] window

- Username
Username for SFTP server login. It's required if Use Private Key is No.
- Password
Password for SFTP server login. It's required if Use Private Key is No.

Job level settings under [Job] window

- Type
Connector type. Select FTP Connector from dropdown.
- Target Folder
Folder path where documents will be saved. If not specified, document will be stored at root level.

Example: Test/Subfolder

HINT

- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

- Additional Parameters

Refer to [Appendix](#) for specifiable parameters.

SharePoint Connector (Authorization Code)

The SharePoint Connector (Authorization Code) uploads scanned documents to a SharePoint site, under a subfolder within a document library.

HINT

File properties of SharePoint will be empty except for the name.

HINT

To decide whether to use Authorization Code or Client Credentials, refer to the following:

- Authorization Code: User authentication. Before using this connector, authentication is required by each user. If you need to distinguish who created the file, please select this connector.
- Client Credentials: Server authentication. Before using this connector, admin consent is required. If you do not need to distinguish who created the file, please select this connector.

Required Settings

Token is required to be obtained for the connector to function correctly.

The SharePoint Connector (Authorization Code) uses OAuth2 to authenticate a user. The user must acquire an authorization token by logging into their SharePoint account from the [User] window. This authorization token is used to log the user into SharePoint at document upload time. The authorization token has a 60-day expiration period. The expiration date/time is extended if the user accesses their account through document uploads (the access must happen before the token expires). If the token expires due to a prolonged period of inactivity, the user must login again to acquire a new token.

Tenant level settings under [Connector] window

There are no Tenant level settings for the SharePoint Connector (Authorization Code).

User level settings under [User] window or Scanner level settings under [Scanner] window

- Token

A user must log into their SharePoint account by clicking on the [Obtain] button and obtaining an authorization token which will be stored in the EdgeXperience Capture Service. This authorization token will be used to upload documents on the user's behalf to a specified folder.

Clicking the [Obtain] button will launch a login screen from Microsoft, from which the user must log in and also allow the EdgeXperience Capture Service to upload documents to their account.

HINT

[Edit a User] or [Edit Scanner Information] window will prompt for “Required Item” when a **Token** is not obtained. If not using the SharePoint Connector (Authorization Code), a token is not required to be obtained.

Job level settings under [Job] window

- **Type**
Connector type. Select SharePoint Connector (Authorization Code) from dropdown.
- **SharePoint Site Path**
Site where documents will be saved. Specify as sites/<sitename>. If not specified, the root site is used by default.
The <sitename> is the same as the SharePoint site path (URL) when the site is accessed via browser.

HINT

Sitename is NOT the Display Name for the site.

- **Document Library**
Library where documents will be saved.

ATTENTION

[Job] window will prompt user to set **Document Library** if it's empty when user tries to save the Job settings. It's required in cases that default library can't be selected in non-English environments.

ATTENTION

The SharePoint site parameter should be specified as <sub-site name> or sites/<site name> or Groups/<groupname> where the <sitename> or <groupname> are the names from the site (or group) URL within SharePoint (when the site or group is accessed via web browser). To get this information, log on to SharePoint from a browser, navigate to that site and get the sitename or group name from the URL.

- **Target Folder**
Folder path where documents will be saved. If not specified, document will be stored at the root level.
Example: Test/Subfolder

HINT

- The folder path should NOT begin with a '/'.
- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

- **Additional Parameters**
Refer to [Appendix](#) for specifiable parameter.

SharePoint Connector (Client Credentials)

The SharePoint Connector (Client Credentials) uploads scanned documents to a SharePoint site, under a subfolder within a document library.

HINT

File properties of SharePoint will be empty except for the name.

HINT

To decide whether to use Authorization Code or Client Credentials, refer to the following:

- **Authorization Code:** User authentication. Before using this connector, authentication is required by each user. If you need to distinguish who created the file, please select this connector.
- **Client Credentials:** Server authentication. Before using this connector, admin consent is required. If you do not need to distinguish who created the file, please select this connector.

Required Settings

Admin Consent is required to be obtained for the connector to function correctly.

The SharePoint Connector (Client Credentials) uses Microsoft Graph API and OAuth2 Client Credentials grant to access to the SharePoint. To get the access token for the API, tenant administrator's consent is needed in advance.

Tenant level settings under [Connector] window

- Admin Consent

A user must get administrator's consent before the SharePoint Connector (Client Credentials) can access to SharePoint using Client Credentials grant.

Clicking the [Obtain] button will launch a login screen from Microsoft, from which the tenant administrator must log in and also allow the EdgeXperience Capture Service to upload documents to their site.

User level settings under [User] window or Scanner level settings under [Scanner] window

There are no User or Scanner level settings for the SharePoint Connector (Client Credentials).

Job level settings under [Job] window

- Type

Connector type. Select SharePoint Connector (Client Credentials) from dropdown.

- SharePoint Site Path

Site where documents will be saved. Specify as sites/<sitename>. If not specified, the root site is used by default.

The <sitename> is the same as the SharePoint site path (URL) when the site is accessed via browser.

HINT

Sitename is NOT the Display Name for the site.

- Document Library

Library where documents will be saved.

ATTENTION

[Job] window will prompt user to set **Document Library** if it's empty when user tries to save the Job settings. It's required in cases that default library can't be selected in non-English environments.

ATTENTION

The SharePoint site parameter should be specified as <sub-site name> or sites/<site name> or Groups/<groupname> where the <sitename> or <groupname> are the names from the site (or group) URL within SharePoint (when the site or group is accessed via web browser). To get this information, log on to SharePoint from a browser, navigate to that site and get the sitename or group name from the URL.

- Target Folder

Folder path where documents will be saved. If not specified, document will be stored at the root level.

Example: Test/Subfolder

HINT

- The folder path should NOT begin with a '/'.
- If the folder does not exist, it is created.
- If the same file name exists in the folder, the file is renamed.

- Additional Parameters

Refer to [Appendix](#) for specifiable parameter.

Appendix

The appendix provides additional information.

Message List of Image Process Connector

This section shows lists of connector related messages that appear in [Batch Log] windows.

OCR Connector

This connector displays the below message start with “Failed to perform OCR. Details:”.

Message	Solution
The image file format is unsupported by OCR Service. Please check the OCR Connector configuration and retry again.	Refer to OCR Service documentation and check if Job setting in the [Job] window has been set correctly.
The image file size is too large. Please check the Job setting and re-scan the document(s) or retry the batch without OCR process.	Refer to OCR Service documentation and check if the Job setting in the [Job] window has been set correctly. Re-scan the document or retry the batch without OCR process from [Batch Log].
The image dimension is out of range. Please check the Job setting and re-scan the document(s) or retry the batch without OCR process.	Refer to OCR Service documentation and check if the Job setting in the [Job] window has been set correctly. Re-scan or retry the batch without OCR process from [Batch Log].
Access denied due to invalid subscription key or wrong API endpoint. Please check the OCR Connector function configuration and try again.	Check if OCR Connector setting in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window. If the problem persists, please contact technical support.
A communication error occurred. Please check API endpoint of OCR Connector and try again.	Check if OCR Connector setting in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window. If the problem persists, please contact technical support.
The API endpoint entered is not in URL format. Please check the OCR Connector function configuration and try again.	Check if the OCR Connector setting in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window. If the problem persists, please contact technical support.
The requests to the OCR Service have exceeded rate limit of your current subscription. Please wait for a while and try again.	Exceeded rate limit of your subscription to perform OCR. Retry the batch from the [Batch Log] window. If the problem persists, please contact technical support.
One or more file(s) failed to upload. Please wait for a while and try again. ({Error Code})	Network issue may have occurred. Retry the batch from the [Batch Log] window. If the problem persists, please contact technical support.

*OCR Connector displays messages that starts with “Failed to perform OCR. Details:”.

Message List of Image Release Connector

This section shows lists of connector related messages that appear in [Batch Log] windows.

Amazon S3 Connector

Message	Solution
AmazonConnector: Amazon Access Key ID is invalid. Please check the Connector/User/Job settings and try again.	Check if the Access Key ID setting in [Connector]/[User]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AmazonConnector: Amazon Secret Key is invalid. Please check the Connector/User/Job settings and try again.	Check if the Secret Key setting in [Connector]/[User]/[Job] windows has been set correctly and then retry the batch from the [Batch Log] window.
AmazonConnector: Region is invalid. Please check the Connector/Job settings and try again.	Check if the Region setting in [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AmazonConnector: Amazon bucket name is invalid. Please check the Connector/Job settings and try again.	Check if the Bucket Name setting in [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AmazonConnector: Unable to download the files from Azure File Share.	An internal issue may have occurred. Contact technical support.
AmazonConnector: One or more file(s) failed to upload. Reason: {Technical error message}.	An internal issue may have occurred. Contact technical support.

Azure Blob Connector

Message	Solution
AzureBlobConnector: Connection string is invalid. Please check the Connector/Job setting and try again.	Check if the Connection String setting in [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AzureBlobConnector: Storage account name is invalid. Please check the Connector/Job setting and try again.	Check if the Storage account name setting in [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AzureBlobConnector: Container name is invalid. Please check the Connector/Job setting and try again.	Check if the Container name setting in [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AzureBlobConnector: Connection type is invalid. Connection Type should be "ConnectionString", "SharedAccessKey", or "SharedAccessSignature". Connection Type Selected: {connectionType}.	Check if Connection type setting in the [Connector]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
AzureBlobConnector: Unable to download files from azure file share or no file found.	An internal issue may have occurred. Contact technical support.
AzureBlobConnector: One or more file(s) failed to upload.	An internal issue may have occurred. Contact technical support.

Email Connector

Message	Solution
Invalid email server settings specified.	Check if the SMTP server, port or user credentials in the [Connector]/[User] windows have been set correctly and retry the batch from the [Batch Log] window.
Source email address in user parameter not specified.	Check if the Source email address setting in the [User] window has been set correctly and retry the batch from the [Batch Log] window.
Source email address in scanner parameter not specified.	Check if the Source email address setting in the [Scanner] window has been set correctly and retry the batch from the [Batch Log] window.
Source email not specified.	Check if the Source email address setting in the [User] or [Scanner] window has been set correctly and retry the batch from the [Batch Log] window.
Destination email not specified.	Check if the Destination email address setting in the [Job] window has been set correctly and retry the batch from the [Batch Log] window.
Email server returned the following error: <Message from email server>.	An internal issue may have occurred. Contact technical support.

Fax Connector

Message	Solution
FaxConnector: Fax sender name is not set in Connector/User/Job settings. Please check the settings and try again.	Check if the Fax sender name in the [Connector]/[User]/[Job] windows has been set correctly and retry the batch from the [Batch Log] window.
FaxConnector: Server address is not valid. Please check the Connector or Job settings and try again.	Check if the SMTP server address in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window.
FaxConnector: Fax Server username is empty. Please check the Connector and try again.	Check if the Fax server username in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window.
FaxConnector: Fax Server password is empty. Please check the Connector and try again.	Check if the Fax server password in the [Connector] window has been set correctly and retry the batch from the [Batch Log] window.
FaxConnector: Fax Number is not specified in the Job Settings. Please check try again.	Check if the Fax number in the [Job] window has been set correctly and retry the batch from the [Batch Log] window.
FaxConnector: Unable to send the fax message.	An internal issue may have occurred. Contact technical support.
FaxConnector: Unable to download files from the Azure File Share or no files found.	An internal issue may have occurred. Contact technical support.

folder sync Connector

Message	Solution
folder sync Connector: Client machine not specified in any of the parameter settings.	Check if the client machine is selected in at least one of the connectors in the [Connector]/[Job] window and retry from the [Batch Log] window.
folder sync Connector: Released files have not been downloaded in {BatchTimeout.Total Minutes} mins or more. Please check connector settings and retry.	Exceeded the token timeout even what batch status is. Check connector settings and retry the batch from the [Batch Log] window.
folder sync Connector: Download files failed. Failed to create a directory.	Check if client machine target folder destination allows files to be written to it or directories created within it. Retry the batch from the [Batch Log] window.
folder sync Connector: Download files failed. The file name or the folder name is too long.	Ensure the file name or folder name in the [Connector]/[Job] is shorter than 256 characters. Retry the batch from [Batch Log] window.
folder sync Connector: Download files failed. Failed to write a file.	Check if the storage on client machine has enough free space, or file name or folder name in the [Connector]/[Job] is shorter than 256 characters. Retry the batch from [Batch Log] window.
folder sync Connector: Download files failed. Please check connector settings and retry.	The connection between the client machines was lost during the download. Check the network connection between client machine and EdgeX. Retry the batch from [Batch Log] window.
folder sync Connector: Download files failed. Please wait for a while and try again.	Network issue may have occurred. Check the network connection between client machine and EdgeX. Retry the batch from [Batch Log] window.
folder sync Connector: Failed to connect to the client app. Please check connector settings and retry.	Failed to connect to client machine. Check the following items and retry the batch from the [Batch Log] window. <ol style="list-style-type: none"> 1. Check the network connection between client machines. 2. Check if host name or Mac address of client machine has configured selected correctly.
folder sync Connector: Failed to save the image.	An internal issue may have occurred. Contact technical support.

Generic Connector

Message	Solution
GenericConnector ({Connector Name}): An error has been detected in Generic Connector. Please contact technical support. ({Error Code})	An internal issue may have occurred. Contact technical support or the connector developer provided a certificate.
GenericConnector ({Connector Name}): Please wait for a while and try again. If the problem persists, please contact technical support. and tell this message. ({Error Code})	Network issue may have occurred. Retry the batch from [Batch Log] window. If the problem persists, please Contact technical support or the connector developer provided a certificate.
GenericConnector ({Connector Name}): Unable to get the authentication token. Token may be locked by another process. Please obtain a new token and try again. ({Error Code})	Generic Connector Token issue. Check if the token of specifying the connector have an issue. Retry after some time. If the problem persists, please Contact technical support or the connector developer who provided the certificate.
GenericConnector ({Connector Name}): A communication error occurred. Please refer to detail: {Response Detail} ({Error Code})	An internal issue may have occurred. please Contact technical support or the connector developer who provided the certificate.
GenericConnector ({Connector Name}): User: {User Name}/{Scanner}. The Authentication token has expired. Please obtain a new token from the User settings page and retry the batch. ({Error Code})	Generic Connector Token issue. Check if the Generic Connector Token in the [User]/[Scanner] window has expired and re-obtain the token.
GenericConnector ({Connector Name}): One or more file(s) failed to upload. Please re-try after sometime. If the problem persists, please contact technical support. and tell this message. ({Error Code})	Network issue may have occurred. Retry the batch from the [Batch Log] window. If the problem persists, please Contact technical support or the connector developer who provided the certificate.
GenericConnector ({Connector Name}): Specified optional string (-gcp) is too long. Please use 256 or fewer characters.	Check the Additional Parameters and modify the length to 256 characters or less.

*For an error, {Connector Name} may not be described.

OneDrive Connector (Authorization Code / Client Credentials)

Message	Solution
OneDriveConnector: Client ID required for authentication is not defined. Please check the OneDrive Connector function configuration and try again or please contact your tenant administrator.	An internal issue may have occurred. Contact technical support.
OneDriveConnector: Client Secret required for authentication is not defined. Please check the OneDrive Connector function configuration and try again or please contact your tenant administrator.	An internal issue may have occurred. Contact technical support.
OneDriveConnector: Unable to download the files from Azure File share.	An internal issue may have occurred. Contact technical support.
OneDriveConnector: One or more file(s) failed to upload.	An internal issue may have occurred. Contact technical support.

Message	Solution
OneDriveConnector: Unable to get the authentication token. Token may be locked by another process. Please retry after sometime.	OneDrive Token issue. Wait a moment and then retry.
OneDriveConnector: The target folder path [{Target Folder Path}] contains invalid characters. File cannot be uploaded. Please change the target folder path and try again.	Check if the Target folder path setting in the [Job] window has been set correctly and retry the batch from the [Batch Log] window.
OneDriveConnector: User Principal Name required for accessing to the drive is not defined. Please check the OneDrive Connector (Client Credentials) configuration and try again.	Check if the User Principal Name in the [User] or [Scanner] window has been set correctly and retry the batch from the [Batch Log] window.
OneDriveConnector: Specified User Principal Name does not exist. Please check the OneDrive Connector (Client Credentials) configuration and try again.	Check if the User Principal Name in the [User] or [Scanner] window has been set correctly and retry the batch from the [Batch Log] window.
OneDriveConnector: Failed to access to the service (Client Credentials). Please check the admin consent is obtained. If you are not an admin, please contact your tenant administrator.	Check if the Admin Consent in the [Connector] windows has obtained. Re-obtain the Admin Consent and retry the batch from [Batch Log] window.

SFTP Connector

Message	Solution
FTPConnector: FTP Server or Host is not set. Please check the Connector / Job Settings and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: Username is not set. Please check the Connector/User/Scanner/Job Settings.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: Password is not set. Please check the Connector/User/Scanner/Job Settings.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: Private Key is not set. Please check the Connector setting and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: Private Key is not in a valid RSA format. Please check the Connector setting and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: Username for Private key is not set. Please check the Connector Settings and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window.
FTPConnector: FTP Server Authentication failed for the user [{Username}]. Please check the username / password and try again. ({Response from FTP server})	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window. If the problem persists, please contact technical support.
FTPConnector: FTP Server Authentication failed for the user [{Username}]. Please check the	Check if SFTP Connector setting in [Connector]

Message	Solution
private key / username / passphrase and try again. ({Response from FTP server})	window has been set correctly and retry the batch from [Batch Log] window. If the problem persists, please contact technical support.
FTPConnector: An error occurred while trying to create target folder. Folder Path: {folder path}. Please check the path and try again. ({Response from FTP server })	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window. If the problem persists, please contact technical support.
FTPConnector: An error occurred while trying to create target folder. Folder Path: {specified folder path}. Permission denied. Please check the path and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window. If the problem persists, please contact technical support.
FTPConnector: An error occurred while trying to upload file. File Path: {file path}. ({Response from FTP server})	Network issue may have occurred. Retry the batch from [Batch Log] window. If the problem persists, please contact your technical support.
FTPConnector: An error occurred while trying to upload file. File Path: {File path} Permission denied. Please check the path and try again.	Check if SFTP Connector setting in [Connector] window has been set correctly and retry the batch from [Batch Log] window. If the problem persists, please contact technical support.
FTPConnector: One or more file(s) failed to upload. {Exception message}	Internal issue may have occurred. Contact your technical support.

SharePoint Connector (Authorization Code / Client Credentials)

Message	Solution
SharePointConnector: Client ID required for authentication is not defined. Please check the SharePoint Connector function configuration and try again or please contact your tenant administrator.	An internal issue may have occurred. Contact technical support.
SharePointConnector: Client Secret required for authentication is not defined. Please check the SharePoint Connector function configuration and try again or please contact your tenant administrator.	An internal issue may have occurred. Contact technical support.
SharePointConnector: Unable to download the files from Azure File share.	An internal issue may have occurred. Contact technical support.
SharePointConnector: One or more file(s) failed to upload.	An internal issue may have occurred. Contact technical support.
SharePointConnector: Unable to get the authentication token. Token may be locked by another process. Please re-try after sometime.	SharePoint Token issue. Retry after some time.
SharePointConnector: The target folder path [{Target Folder Path}] contains invalid characters. File cannot be uploaded. Please change the target folder path and try again.	Check if the Target folder path setting in the [Job] window has been set correctly and retry the batch from the [Batch Log] window.
SharePointConnector: Failed to access to the service (Client Credentials). Please check the admin consent is obtained. If you are not an admin, please contact your tenant administrator.	Check if the Admin Consent in the [Connector] windows has obtained. Re-obtain the Admin Consent and retry the batch from [Batch Log] window.

Additional Parameters for Connectors

This section explains about the additional parameters for connectors which are set in the [Job] window.

When setting up a job in the EdgeXperience Capture Service, some parameters can be provided to the connector which can alter the way the connector functions. The parameters are entered in the [Additional Parameters] field under the [Save Destination] section in the [Job] window.

These additional parameters are Job level settings, so if a certain setting is set by Additional Parameters, the corresponding settings at the Tenant or User level will be ignored.

Between each parameter a single space should be given as a delimiter. If the parameter comes with a value, the value should be quoted by double quotation.

Example of Azure Blob Connector usage: `-at="ConnectionString" -f -ij`

Parameters for Azure Blob Connector

Item	Parameter	Description
-at	Access Type	Determines the type of connection string to be used to for uploading the files. <u>Supported Values:</u> ConnectionString / SharedAccessKey / SharedAccessSignature <u>Usage:</u> -at="ConnectionString"
-ai	Access Info	Exact connect string / access key / SAS token to be used. <u>Usage:</u> -ai="<azure connection string / sas token / access key>"
-an	Account name	Name of the Azure storage account. <u>Usage:</u> -an="myazurestorage"
-ct	Container	Name of the container in the storage account where the file will be stored. <u>Usage:</u> -ct="mycontainer"

Parameters for folder sync Connector

Item	Parameter	Description
-u	Create user/scanner folder	If this option is specified, a subfolder will be created. Name of the subfolder will be the User Display Name or scanner name and scanned documents will be uploaded under the < User Display Name / scanner name > subfolder, depending on the Authentication Method configured by the super administrator.

Parameters for Generic Connector

Item	Parameter	Description
-u	Create user/scanner folder	If this option is specified, a subfolder will be created. Name of the subfolder will be the User Display Name or scanner name and scanned documents will be uploaded under the < User Display Name / scanner name > subfolder, depending on the Authentication Method configured by the super administrator.
-gcp	Optional String	<p>Pass an optional string to the connector. In details, please contact to the connector developer.</p> <p><u>Usage:</u> -gcp="myparameter"</p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> - Double quotation is needed when the parameter have space(s). Other double quotations must be replaced with '%22'. (Replacing the space with '%20' is also acceptable.) - Encoding Rule: (Other percent encodings will be ignored.) % -> %25 " -> %22 (space) -> %20

Common Parameters

Item	Parameter	Description
-i	Include Index file	If this option is specified, index .xml file will be uploaded.
-ij	Include Index file in JSON	If this option is specified, index .xml file will be converted to JSON format, and the file will be renamed with .json extension and uploaded. (<i>not applicable for folder sync connector</i>)
-f	Create batch folder	<p>If this option is specified, a subfolder under the target folder, which specified by the [Target Folder] field, will be created.</p> <p>Name of the subfolder will be the batch ID and scanned documents will be uploaded under the <batch ID> subfolder.</p>

folder sync Connector Client Application

This section explains about folder sync Connector Client Application which must be downloaded from the download link on [Connector] or [Job] window. When setting up a job in the EdgeXperience Capture Service, the client application must be selected from Obtain or Re-obtain under the [Job] or [Preference] level settings. The folder sync Connector Client Application can download scanned documents from EdgeXperience Capture Service to the local machine storage.

Preference

EdgeXperience Account Login

Settings used to login into EdgeXperience Capture Service.

EdgeXperience TenantCode – Tenant Code of EdgeXperience Capture Service. This value is also used in the scanner.

Username - ID used to login into EdgeXperience Capture Service. An ID is an email address that is assigned to a user. If setup target folder path for specific users, enter an ID of Admin User.

ATTENTION

The ID entered for the Username must be logged into EdgeXperience Capture Service at least once.

Proxy Server Settings

Settings used to setup proxy server to access web page if web access to the internet is blocked.

Enable Proxy Server – Check to enable proxy server

Proxy Server Address – Proxy server IP address or URL

Proxy Server Port – Proxy server port number

Use Authentication for Proxy Server – Check if proxy server requires authentication

Username – Proxy server authentication username

Password – Proxy server authentication password

Application Settings

Settings used to setup for client application.

Save To – root target folder path where files will be downloaded to.

ATTENTION

This [Save To] is for all users setting, so if [Save To] in CustomSettings is set for specific user, this setting in Application Settings will be ignored.

[Login] button

Click this item to login into EdgeXperience Capture Service.

[Cancel] button

Click this item to cancel the operation

Required Settings

EdgeXperience TenantCode, **Username** and **Save To** is required on [Preference] tab.

ATTENTION

Folder path should be accessible from SYSTEM account on Windows.

CustomSettings

Overwrite target folder path for specific user

Authentication method

- “Username/Password or NFC, User Code/PIN or NFC” to setup folder specific to a username
- “Scanner” to setup folder specific to a scanner name

Login ID / Scanner Name – ID used to login into EdgeXperience Capture Service or Scanner name

Save To – Folder path for Login ID or Scanner name

[Save/Add] button – save or add the folder path for specified username or scanner

[Update] button – update the folder path for specified username or scanner

[Delete] button – delete the folder path for specified username or scanner

[Delete All] button – delete all folder path for username or scanner

ATTENTION

Folder path should be accessible from SYSTEM account on Windows.

History

Display the file and file path downloaded.

Status – display the status of connection between client and EdgeXperience Capture Service

Visit Web Site – link to the EdgeXperience Service Website

File Download history – display the time stamp of file downloaded and file path per file.

ATTENTION

This File Download history will be deleted when restarting client machine.

Logout

To perform a logout, on the [Preference], click the Log out button.

Reset the current login user for the client application. This requires a login again by restarting the client application setup.

Message List

This section shows lists of error messages on client application.

Message	Solution
Unable to open website.	Check if Tenant Code for [EdgeXperience TenantCode] has been set correctly and reload the website.
Failed to restart the Windows service. Service Name = {NXCFFileSyncServiceDisplayName}. Please reboot manually.	Check if the Service is working and reboot it manually.
Review the network or Proxy Server Settings and try again.	Check if network connection between client machine and EdgeXperience Capture Service or Proxy Server Settings has been set correctly and retry.
Review the Proxy Authentication Settings and try again.	Check if the Proxy Authentication Settings have been set correctly and retry.
User Login Failed.	Check if ID entered for [Username] has been set correctly and retry.
Error setting automatic startup.	Check if user who installed client application has the read permission for

Message	Solution
	registry and retry.
Failed to Logout.	Check if user who installed client application has the read permission for registry and retry.
Unexpected error. Please try again	An internal issue may have occurred. Contact technical support.