



SharePoint & OneDrive Connector

Quick Start Guide
version 2.0

Introduction

This document describes the requirements of the connector and provides the instruction on how to configure the connection and setup the connector. Other essential configuration steps that are part of the basic ScannerVision features (e.g. installation, configuring Networking Settings, templates, Users, etc) are not covered by this document.

This document will also not cover all aspects of the registration of the app within SharePoint, and will only include important information required for the setup of the connection in ScannerVision. It also does not cover the setup of a SharePoint environment.

The SharePoint & OneDrive Connector has been updated to make use of OAuth 2.0. The connector has also been updated to reflect that it is also capable of connecting to OneDrive for Business accounts.

Please Note: Personal OneDrive accounts are not supported.

Requirements

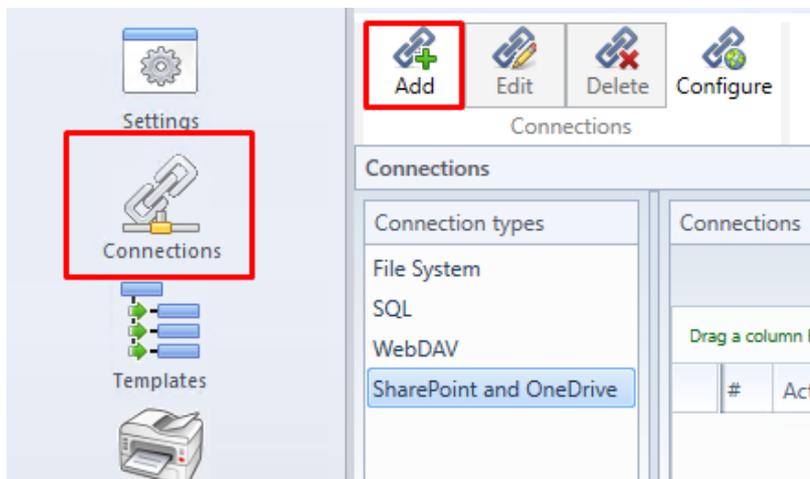
The ScannerVision SharePoint & OneDrive Connector V5.1.0.25 requires ScannerVision Server V9.6.1.1261 and HPN V9.6.7.1111 or higher. Setup of the app within SharePoint can only be done by the Microsoft Azure AD Administrator.

To be able to upload a document to your SharePoint environment, the user needs to have the correct role and rights configured in the environment. Please contact your SharePoint advisor to get more information about this requirement.

Should you have any questions, please do not hesitate to contact our support team at support@ubunye.com for assistance.

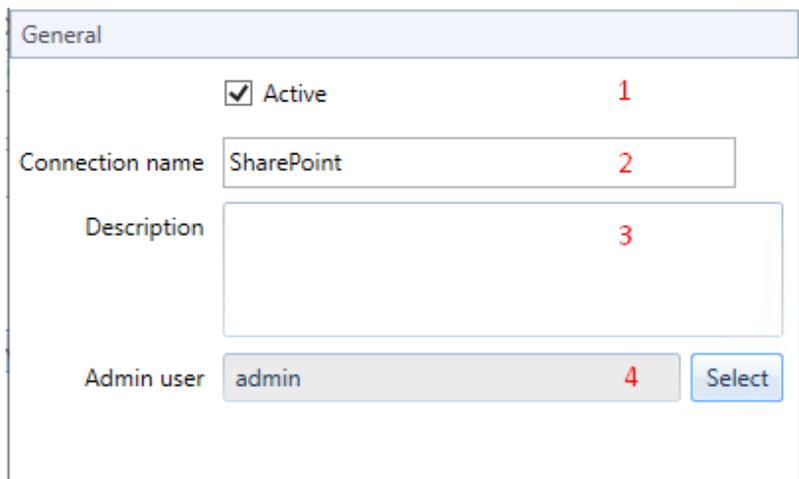
ScannerVision™ SharePoint/OneDrive Configuration

Connection Settings



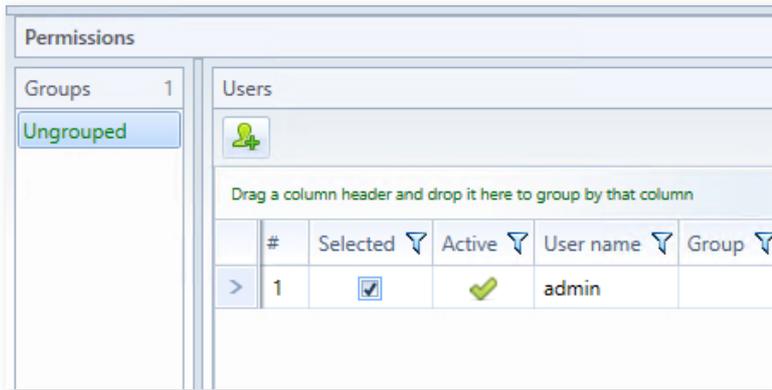
Under the Connections section select SharePoint and OneDrive and click Add

This will open the setup window for a new SharePoint and OneDrive connection.



Under General

1. Ensure the Active checkbox is enabled
 2. Give the connection a unique name so it can be identified easily on the connector setup
 3. Optional. Give a description for the connection
 4. Select an Admin user to be used for the connector configuration
-



Under Permissions

1. Select the group (if configured) of users which should be allowed to upload to SharePoint/OneDrive
(if not configured, users will be shown under Ungrouped and must be configured individually)
2. Select the checkbox until a tick is displayed. This enables permission for the user to see the connection.

If the checkbox is unchecked, the user does not have permission. If a dash is shown and the user is part of a group, the user will inherit the permission set at group level. Please refer to the ScannerVision User Manual for additional information related to Connection permissions.

Online/On Premises

If you are connecting to SharePoint Online, tick the check box below

Design Time URL

The URL of the Sharepoint server to connect to when setting up the connector

Run Time URL

The URL of the Sharepoint server to connect to in RunTime

[...]

OAuth

OAuth 2.0 client application parameters for SharePoint Online (select None to use legacy user credentials)

Grant Type None Authorization Code Client Credentials

Under Property Definitions & Descriptions

If you are connecting to SharePoint Online, you will need to enable the checkbox. If you are connecting to an On Premise installation of SharePoint, you can leave the checkbox disabled.

NB: OAuth 2.0 is not available for On Premise installations of SharePoint, only for SharePoint Online.

The Design Time URL and Run Time URL of the SharePoint/OneDrive server needs to be fully qualified, i.e. they must contain the http:// or https:// protocol specifier as well as the site if applicable. It is not necessary to include a specific page and extension. For example in the following URL <https://company365.sharepoint.com/sites/Site name/Shared documents/Forms/AllItems.aspx> only the highlighted section is necessary for the connection.

The Design Time URL is used to setup the connector within ScannerVision. The Run Time URL is used when the connector uploads a document to SharePoint/OneDrive during processing.

Under OAuth, Grant Type can be set to None, Authorization Code, or Client Credentials.

None makes use of legacy credentials if no OAuth 2.0 is being used.

The screenshot shows the 'OAuth' configuration page. At the top, it says 'OAuth 2.0 client application parameters for SharePoint Online (select None to use legacy user credentials)'. Below this, there are three radio buttons for 'Grant Type': 'None', 'Authorization Code' (which is selected), and 'Client Credentials'. Below the radio buttons are several text input fields: 'Authorization Endpoint', 'Token Endpoint', 'Client ID', 'Client Secret', 'Resource', 'Scope', and 'Redirect URI'. The 'Redirect URI' field contains a redacted value represented by a black bar.

Authorization Code and Client Credentials make use of the new OAuth 2.0 settings

The Redirect URI field will be auto populated with a URI in the following format:
`https://{SERVER_NAME}:{WEB_PORT}/oauth2/callback`

The WEB_PORT is optional and will only be shown if the default port of 443 is not used.

In Microsoft Azure, the Administrator will need to register a new application under App Registrations with Web as the platform. The Redirect URI used should be the one provided by ScannerVision from the screen on the left.

Once the application has been registered, the Application (Client) ID shown on the Overview screen can be copied to the setup in ScannerVision under Client ID.

In Azure, select Endpoints to display a list of endpoints for the application. The Authorization endpoint and Token endpoint can be copied over to the corresponding fields in ScannerVision.

NB: Only V1 endpoints are required.

Under Certificates & Secrets, a new client secret will need to be created. It is up to the Admin to decide what to call the secret and when it would expire.

NB: once created, copy the value of the Value field, NOT the value of the Secret ID, and paste it in the Client Secret field in ScannerVision. This needs to be done while still on the page as the value will be hidden later.

Under API Permissions, select SharePoint with Delegated Permissions. The basic permissions required are AllSites.Read, AllSites.Write, MyFiles.Read and MyFiles.Write.

In the Resource field, simply enter the URL of SharePoint. It is not necessary to use the full URL, simply `https://{tenantname}.sharepoint.com`.

OAuth

OAuth 2.0 client application parameters for SharePoint Online (select None to use legacy user credentials)

Grant Type None Authorization Code Client Credentials

Token Endpoint

Client ID

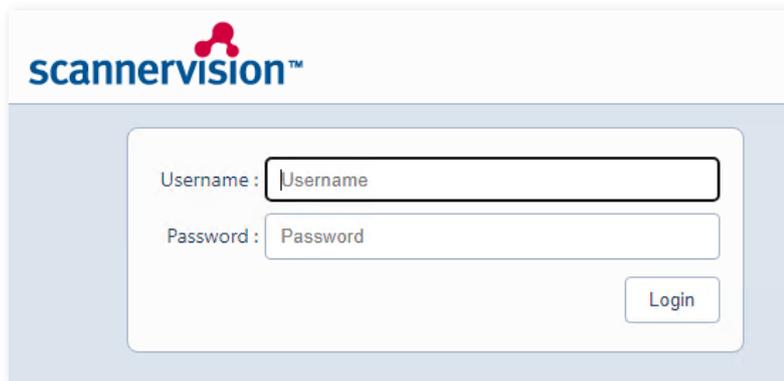
Client Secret

Resource

Scope

If the details for Authorization Code has been entered and the Grant Type is switched to Client Credentials, the fields will be automatically populated with the necessary information and will not need to be entered again.

Once the necessary information has been completed, select Save.



The image shows the ScannerVision login interface. At the top left is the ScannerVision logo, which consists of three red dots above the text 'scannervision™'. Below the logo is a light blue rectangular box containing a white form. The form has two input fields: 'Username:' followed by a text box containing the placeholder text 'Username', and 'Password:' followed by a text box containing the placeholder text 'Password'. To the right of the password field is a 'Login' button.

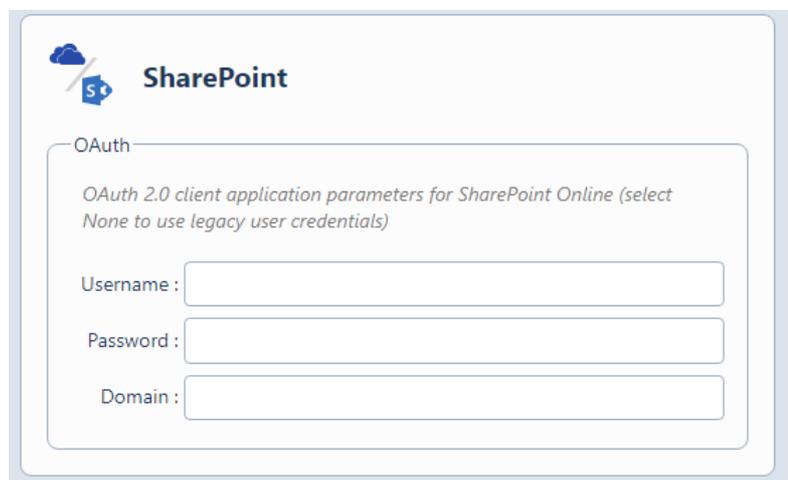
Connection Configuration

Back on the Connections screen, select the SharePoint/OneDrive connection which was just created and click on Configure.

NB: the ScannerVision Networking Service must be running for the next steps.

This will open a web page with a login page.

Enter the Username and Password of the Admin user which was selected for the SharePoint/OneDrive connection and click Login.

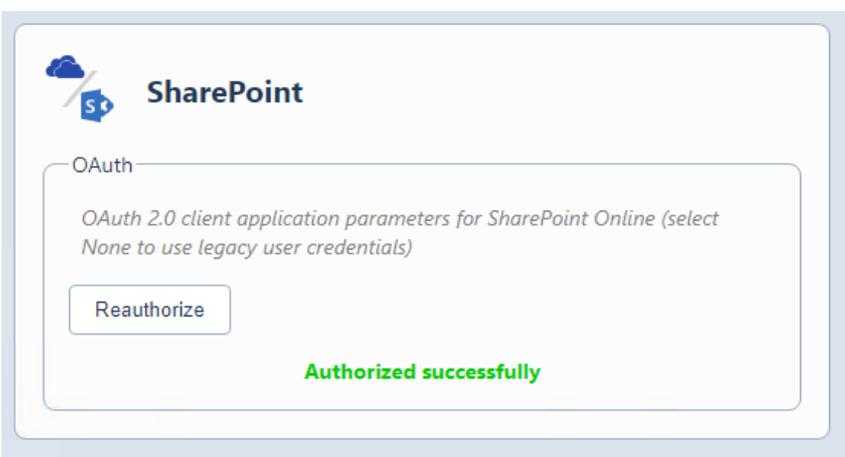
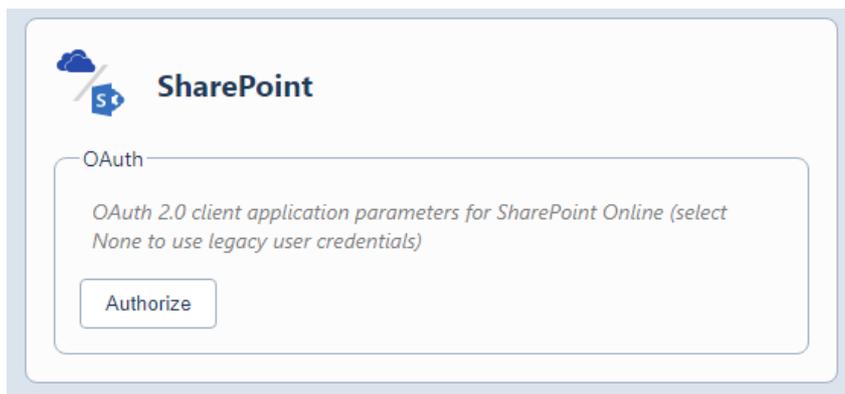


The image shows the SharePoint OAuth configuration page. At the top left is the SharePoint logo, which is a blue cloud with a white 'S' and a plus sign, followed by the text 'SharePoint'. Below the logo is a light blue rectangular box containing a white form. The form has a section titled 'OAuth' with a sub-header 'OAuth 2.0 client application parameters for SharePoint Online (select None to use legacy user credentials)'. Below this are three input fields: 'Username:', 'Password:', and 'Domain:'.

If permissions have been setup correctly, the SharePoint/OneDrive connection will appear once logged in, under the name specified for the connection.

If the connection does not appear, close the browser and restart the ScannerVision Networking Service before logging in again.

If Grant Type has been set to None, the SharePoint Username and Password can be entered directly, then click Save. A message with "All properties saved" will be shown. You can now logout or close the browser.



If Grant Type has been set to Authentication Code an Authorize button will instead be shown.

When clicking on Authorize, you will be taken to the login screen for Microsoft to authorize your account. This will include any 2FA that is required by Microsoft. Once you have successfully authorized, you will be taken back to the Configuration web page and a message will show "Authorized successfully". The button will have updated to say Reauthorize. Click Save, then logout or close the browser.

You will now be able to setup the SharePoint/OneDrive connector on a template.

NB: Once a user has been logged into their Microsoft account, the user will remain logged into their account on the browser. The user will need to open a Microsoft page and explicitly log out of their account before the next user should be allowed to login and authorize their account in the same browser session.

It is advised that the configuration web page URL be sent to each user individually that needs to be able to upload to SharePoint/OneDrive so they may authorize their credentials on their own computers.

Alternatively, the browser settings must be changed to clear cookies and other site data, and the browser must be completely closed between logins of different users if they are to authorize their credentials on the same computer.



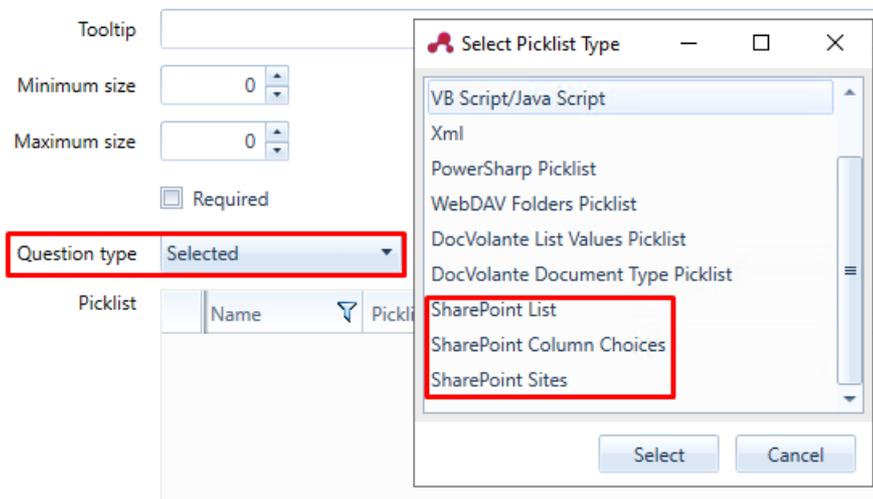
SharePoint

This connection has no user definable properties

If Grant Type is set to Client Credentials, no login information is required. The Client ID and secret of the app will be used to retrieve a token directly. It is not user specific.

NB: when switching between Grant Types, you will need to wait ± 1 minute or restart the Networking Service (if it is running) for the ScannerVision database to be updated with the changes.

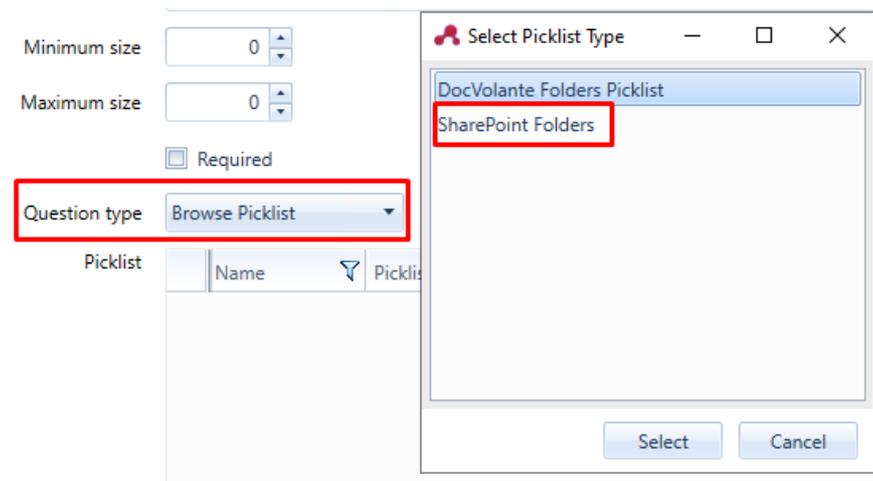
SharePoint/OneDrive Picklist Setup



The SharePoint/OneDrive connector includes 4 different picklists, namely: SharePoint Sites, SharePoint Column Choices, SharePoint Lists and SharePoint Folders. SharePoint Folders is found under the Browse Picklist type when setting up a Question.

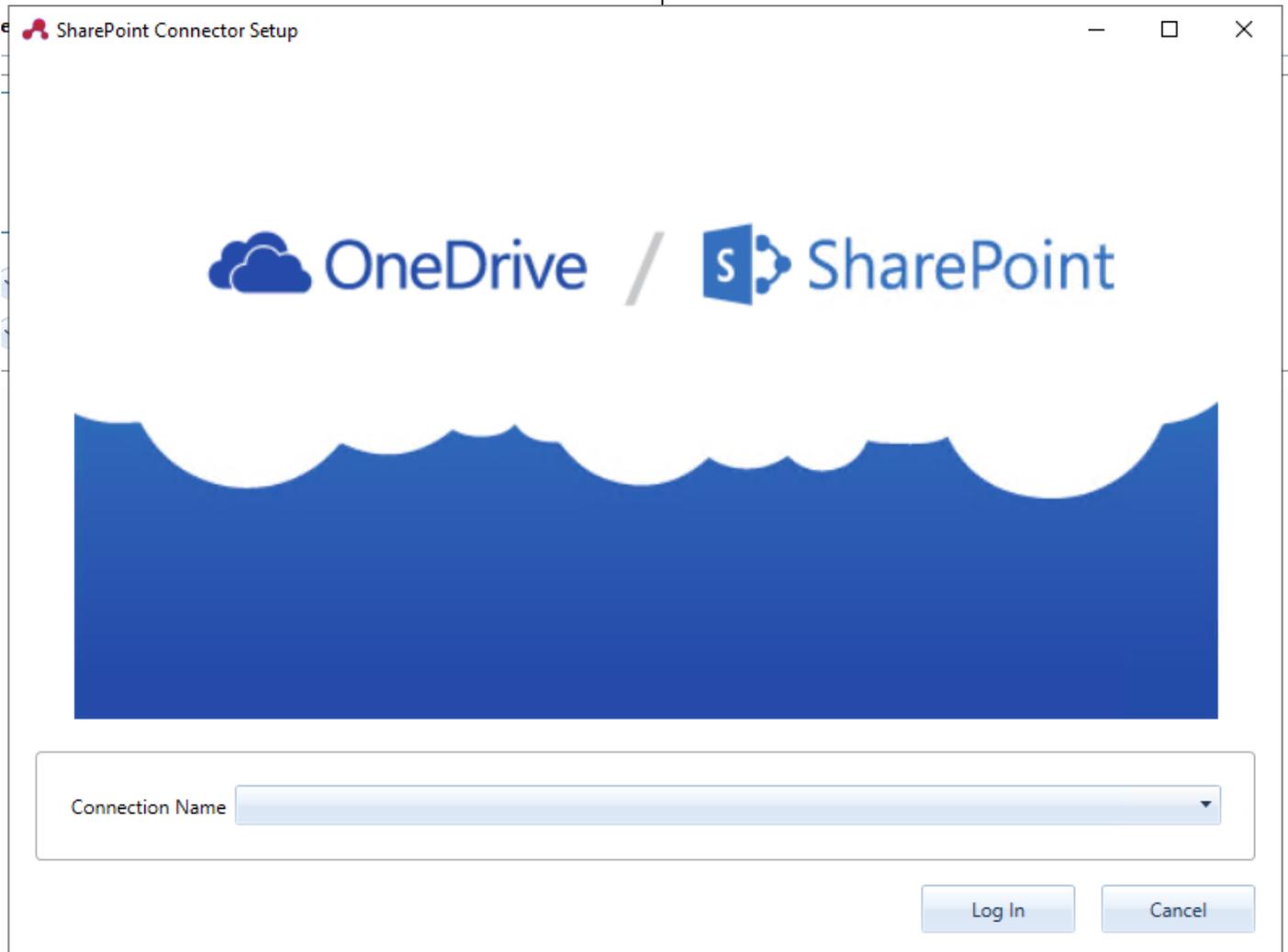
Each picklist has its own setup. When creating a picklist you will see the Connection selection screen, select the connection name you wish to use and click Login. If successfully authorized, the picklist setup screen will be displayed.

For a detailed description of each picklist, please refer to the SharePoint User Manual included in the connector installation folder.



SharePoint/OneDrive Connector Setup

On the template, click and drag over an instance of the SharePoint/OneDrive connector and click on Configure. This will open the SharePoint/OneDrive connector setup screen.



1. Document Title will be the name of the document uploaded to SharePoint/OneDrive.
2. Destination Library will be the site into which the document is uploaded.
3. Folder will be the folder where the document will be uploaded to within the Library. (Mapping Library must be selected before the folder can be selected).
4. Overwrite file if it exists will overwrite a file which has the same name as specified in Document Title.
5. Mapping Library is the library from which field names are retrieved.
6. Library Fields are metadata fields associated with the documents in the selected library. (If a value is specified in a "Name" field under library fields, this will override the value in Document Title).

Once setup is complete, click Save. Click Apply settings to save changes made to the template.

SharePoint Connector Setup

Document Title [...]

Destination Library [...] [...]

Folder [...]

Overwrite file if it exists

Mapping Library [...]

Library Type

Library Fields

Field Title	Value
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