Cloud Information Manager

ScannerVision Connector Quick Start Guide

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1 Product information

Conventions

The following conventions may be used in this guide:

- **Bold text** is used for menu items and buttons
- Screen, text box, and drop-down menu titles are spelled and punctuated exactly as they are displayed on the screen
- *Italics* are used for document titles
- Text or commands that a user enters are displayed as text in a different font or in a text box as shown in these examples:

1. On the command line, enter `net stop program`
2. Create a batch file that includes these commands:

```
net stop program
gbak -rep -user PROGRAMLOG.FBK
```

- Icons are used to draw your attention to certain pieces of information. Examples:

This indicates information that is useful to know.

This indicates important information that you should know, including such things as data loss if the procedure is not done properly.

System requirements

Supported web browsers	
Browser	**Supported versions**
Google Chrome	Version 70 or later
Microsoft Edge	Version 92 or later
Apple Safari	Version 14 or later

TA Cloud Information Manager Mobile application Supported operating systems	
Platform	**Supported versions**
iOS	14.0 and later
Android	6 and later

2 Introduction

This document describes the Cloud Information Manager Connector requirements and provides instructions on configuring the Connector.

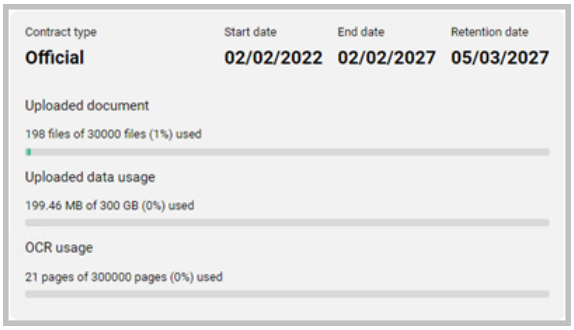
The focus of this document is on Connector configuration, so the document does not cover basic ScannerVision features such as installation, user, network server, OCR settings, Zone Recognition Settings, and Expression editor.

This Connector can be used for both Kyocera Cloud Information Manager and TA Cloud Information Manager.

About the Cloud Information Manager Connector

Once installed and properly configured, the Cloud Information Manager Connector uploads a single document with metadata to Cloud Information Manager as Indexed.

- If a document has already been OCR processed by ScannerVision, the OCR counter on Cloud Information Manager is not incremented.
- Data storage on Cloud Information Manager is counted based on file size.
- The number of documents counted is based on the number of uploaded documents.
- If at least one of the **Uploaded document**, **Uploaded data usage**, or **OCR usage** counts exceeds the limit indicated, uploading the document fails.



3 Connector installation

This chapter covers the following:

- Installing the Connector on the ScannerVision server
- Updating the Connector
- Uninstalling the Connector

Install the Connector

To install the Cloud Information Manager Connector on the ScannerVision server, follow these steps:

1. Copy the `CIM Connector.msi` installer to the ScannerVision server.
2. Double-click `CIM Connector.msi` to open the installer.

   Administrator privileges are required to install the Connector on the ScannerVision server.

3. Read and accept the End-User License Agreement.
4. Select **Next**.
5. Select **Install**.
6. After the installation finishes, select **Finish**.

Update the Connector

If you need to install an updated version of the Connector, copy the updated `CIM Connector.msi` installer to the ScannerVision server. Follow the steps in the *Connector installation* topic to install the update.

Uninstall the Connector

If you need to uninstall the Connector from the ScannerVision server, follow these steps:

1. Locate the `CIM Connector.msi` installer on the ScannerVision server.
2. Double-click `CIM Connector.msi` to open the installer.
3. On the Welcome page, select **Next**.
4. Select **Remove**.

5 After the uninstall finishes, select **Finish**.

4 Connector configuration

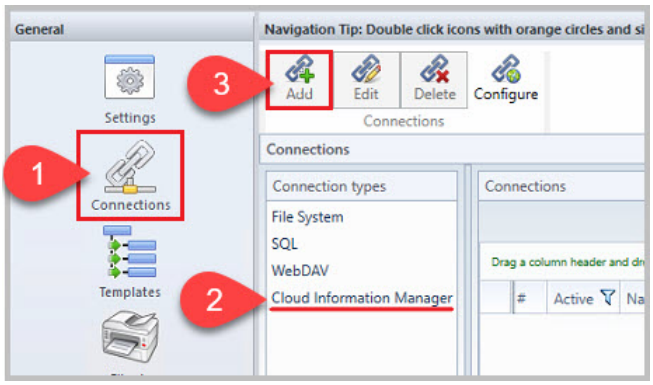
This chapter covers the following:

- Configuring the Connector connections in the ScannerVision application
- Configuring the Connector settings in the ScannerVision application

Connections

Add the Connector in ScannerVision.

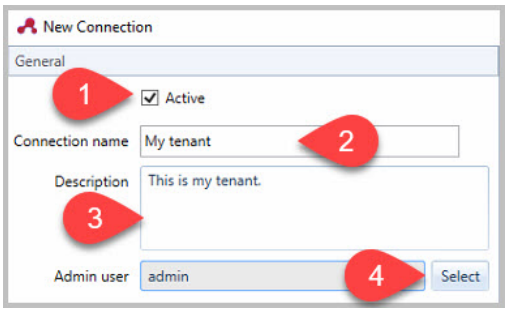
1. On the ScannerVision server, select **Start** > **ScannerVision** > **ScannerVision**.
   The ScannerVision Processing Engine window displays.
2. In the **General** area, select **Connections** (1).



3. Select **Cloud Information Manager** (2) and then select **Add** (3).
   The New Connection window displays.

General

1. On the New Connection windows, make sure that **Active** is selected (1).



2 Enter the Connection name. Enter a name that identifies the customer with whom the connection is associated. For example, if you create this Connector for an organization named Customer A, enter a Connection name like "CIM Connection for Customer A."

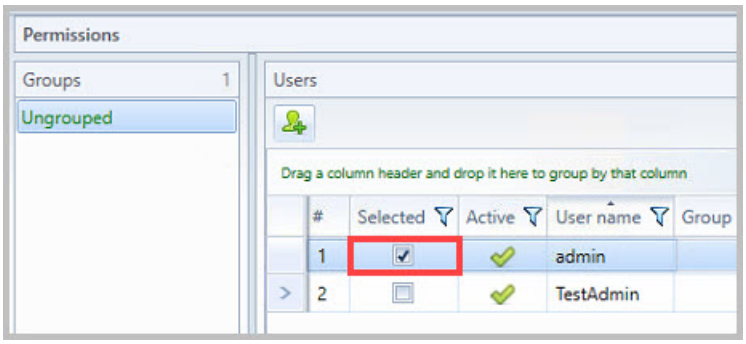
3 (Optional) Enter a description for the connection.

4 Set an Admin user that is used for the Connector configuration.

Permissions

1 Select the group or user that should be allowed to upload a document to Cloud Information Manager.

2 Select the check box for the user or group in the Selected column until a check mark displays. The check mark allows the user to see the connection.



Property definitions

1 Enter the domain name, organization name, and user credentials for Cloud Information Manager.

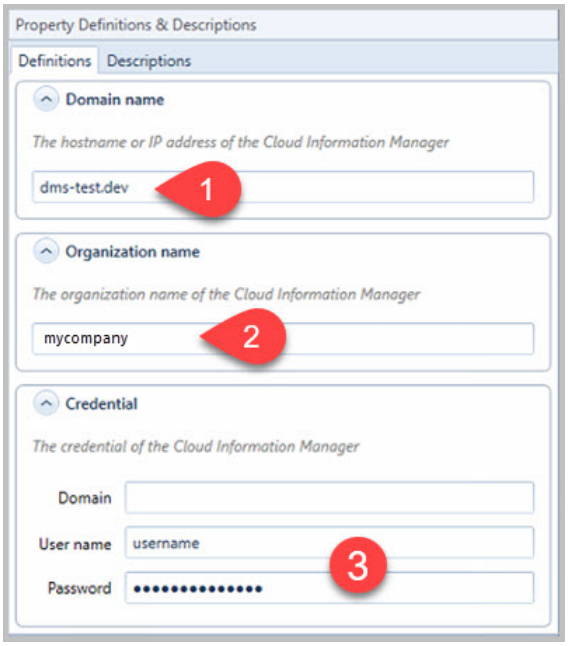
For example, if the Customer portal of the Cloud Information Manager tenancy has a URL like this example:

`https://mycompany.dms-test.dev`

the Domain name is `dms-test.dev` (1)

and the Organization name is `mycompany` (2).

Enter the information as shown below, substituting the information for the Cloud Information Manager server and the Organization name of the customer you are adding.

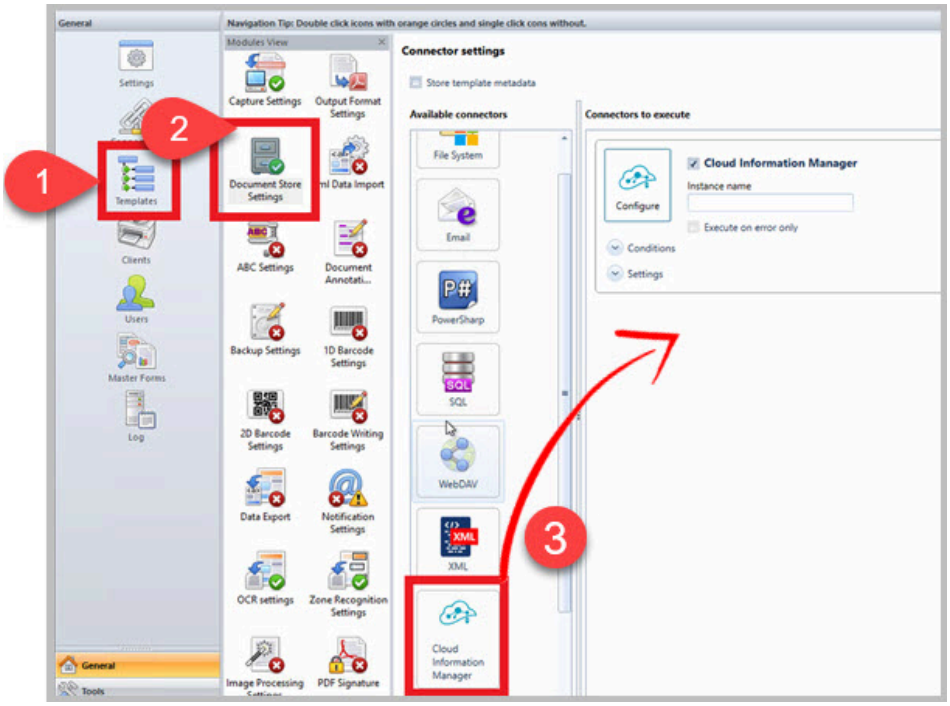


2 In the Credential area (3), enter the credentials of a Cloud Information Manager user. The user you enter must have all the permissions of the document class the customer wants to upload to CIM. As you type the Password, dots replace the characters you entered. Domain is not used, so you can leave it empty.

If you reopen this window, the password field appears blank. The password is saved correctly and does not need to be re-entered.

Connector

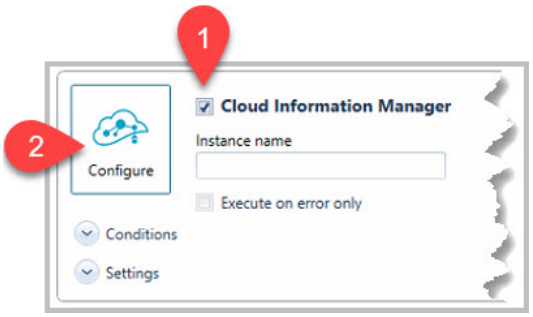
1 In the **General** area, select **Templates** (1), and then from the Modules View, select **Document Store Settings** (2).



2 Drag and drop **Cloud Information Manager** (3) from the **Available connections** area to the **Connectors to execute** area.

Connector connection setup

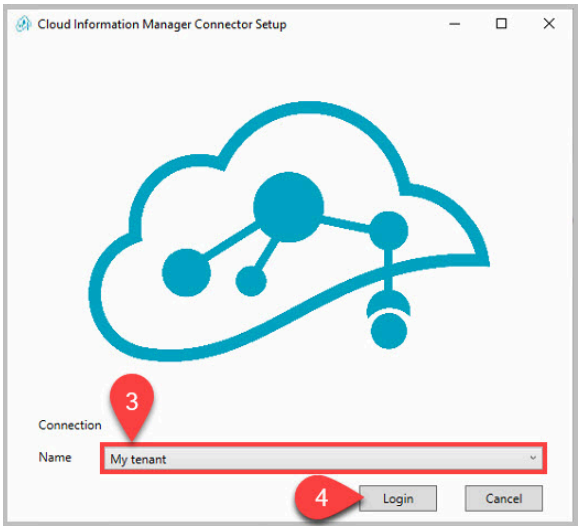
1 Make sure the Cloud Information Manager Connector check box is selected (1)



2 Select **Configure** (2).

3 Select **Connection**.
The Cloud Information Manager Connector Setup window displays the connection name set up earlier in step 2 of the **Connections** > **General** topic.

"My tenant" (3), shown below, is the example connection name used earlier in this guide. The **Name** menu will display the name you set up.



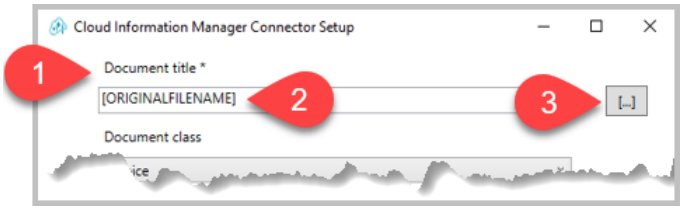
4 Select **Login** (4).

After successfully logging in, the Cloud Information Manager Connector Setup window displays.

Connector configuration: Document title and Document class

In this setup window, configure both the document title and document class.

1 **Document title** (1) is a required field. You cannot select **Save** without an entry.

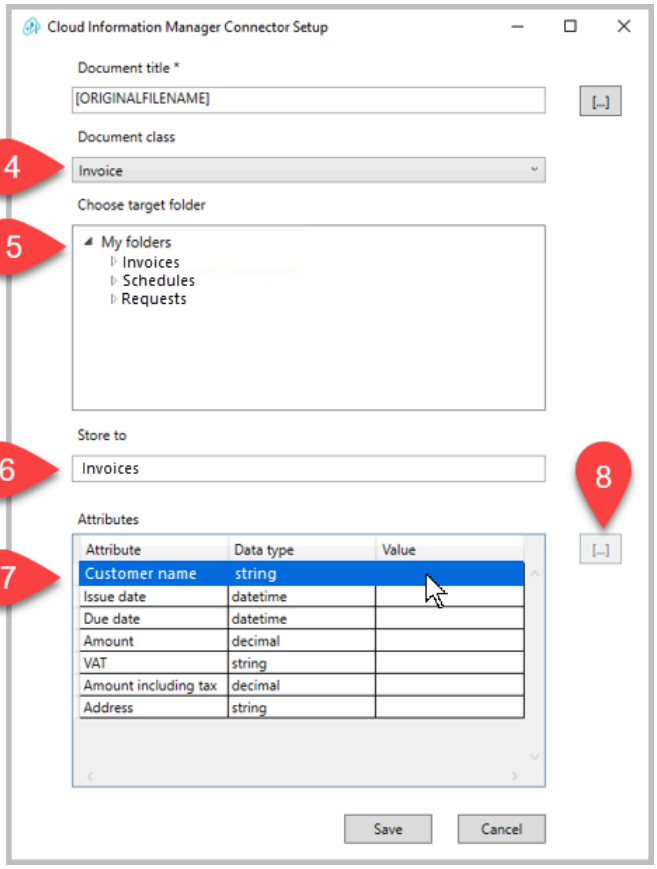


- You can type a document title manually (2) or use the Expression editor (3). The example image above used the Expression editor to insert a tag. The document title will be the original file name.
- Both "with file extension" and "without file extension" are supported.

  For example, when typing a title manually, you can enter either of the following filenames since they are both supported: `sample-`

`document.pdf` or `sample-document`. When using Expression editor, you can use either of the following tags since they are both supported: `[ORIGINALFILENAME]` or `[ORIGINALFILENAMEWITHOUTEXTENSION]`

2 From the **Document class** menu (4), select the document class you want to configure.



3 In the **Choose target folder** area, select the destination folder (5) where you want to upload documents for this Document class.

Expand **My folders** to see the Cloud Information Manager subfolders. The target folders displayed are the folders currently in Cloud Information Manager.

The target folder you chose is displayed under **Store to** (6).

If you do not select a destination folder, `My folders` is used as the default destination folder for the document class.

4 Next, in the "Attributes" area, you need to match the Cloud Information Manager attributes with ScannerVision metadata.

Select a row (7) and then select **[...]** (8).

The ScannerVision Expression Editor opens.

5 From the "Available Tags" column, select the ScannerVision tag that will extract the information for the attribute you selected, and then select **Save**.

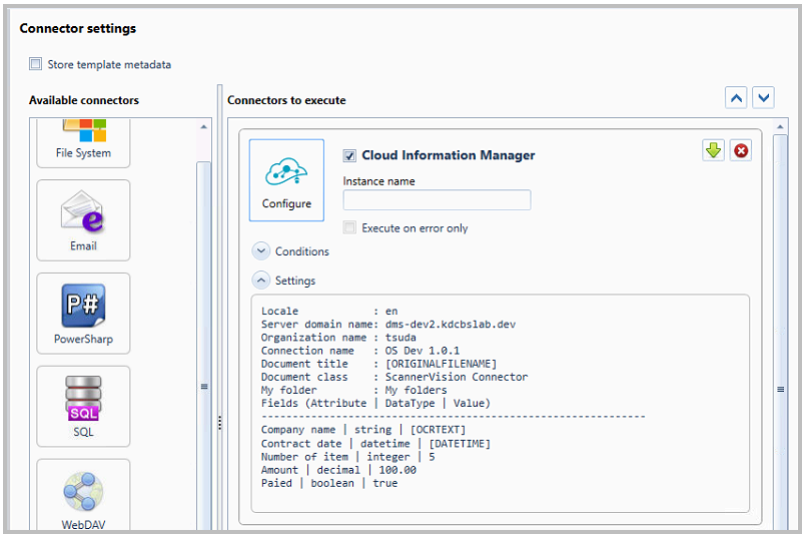
> You can also type a value directly into the Attributes table without using the ScannerVision Expression Editor if the value is not a variable.

The Connector Setup window displays, and the tag you selected displays in the Value column.

6 Repeat steps 4 and 5 until all the Attributes have a value associated with them.

7 Select **Save**.

8 Check the configured settings by selecting **Settings**. An example of the settings is shown below.



9 Make sure you select **Apply settings** after all configuration settings are finished.

> If you do not select **Apply settings** and exit the window, all your configuration settings are lost.

This completes the installation and configuration of the Connector. Test the connector to make sure that it delivers documents to Cloud Information Manager as expected.

Supported data types

You can configure attributes based on the Document class you selected when configuring the Connector. Use the ScannerVision Expression Editor to map ScannerVision metadata to Cloud Information Manager's attributes.

The following table describes the supported data types.

Data type	Description
string	Minimum length is 0. Maximum length is 256.
datetime	CIM's expectation of datettime format is YYYY-MM-DD. CIM connector converts datatime format sent by ScannerVision to YYYY-MM-DD.
integer	-
decimal	Two decimal places are supported. For example, 55.0, 55.00, 100.99, 298.12 A comma (,) is not allow in place of a decimal (.)
boolean	Acceptable boolean attributes: • true • false Note the capitalization of the attributes. Do not use quotation marks.

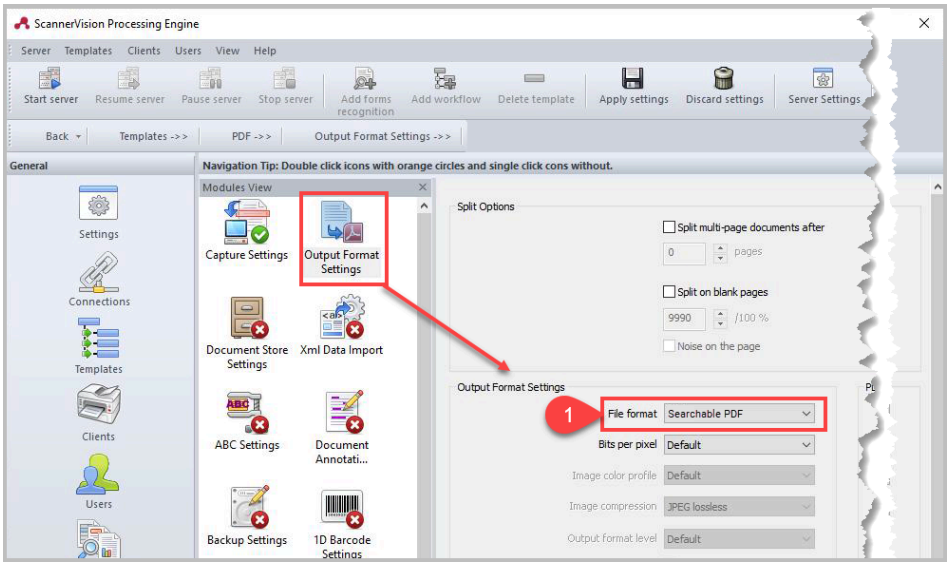
Output Format Settings

The "Output Format Settings" for PDF output must be set to either "Searchable PDF" or "PDF/A" for the output document to be accepted by Cloud Information Manager.

Selecting any other file format than **Searchable PDF** or **PDF/A** causes the process to fail.

1 Select **Templates** > **PDF** > **Output Format Settings**.

2 On the "Output Format Settings" pane, select **File Format** (1).



3 Select either **Searchable PDF** or **PDF/A**.

4 From the menu bar at the top, select **Apply settings**.

5 Third-party notices

This application contains the following open source or separately licensed third-party components:

Cloud Information Manager components

Third-party components listing

Json.NET

RestSharp

Applicable license text for third-party components

License Text: Apache-2.0

License Text: MIT

Third-party components information

Json.NET

Homepage: https://www.newtonsoft.com/json

Copyright: (c) 2022 Newtonsoft

License: MIT License

RestSharp

Homepage: https://restsharp.dev/

Copyright: (c) 2009-2020 John Sheehan, Andrew Young, Alexey Zimarev and RestSharp community

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Version 2.0, January 2004

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