KYOCERA
Microsoft connector

SET UP AND
OPERATION GUIDE

KYOCERA
Microsoft connector

Version 1.0

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KYOCERA Document Solutions America, Inc.
Software Solutions Group
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KYOCERA
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1. Introduction to KYOCERA Microsoft connector

Kyocera's KYOCERA Microsoft connector is a Kyocera Business Application designed to simplify document scanning from a network connected Kyocera HyPAS-enabled MFP to an existing Microsoft SharePoint On-Premise, Exchange On-Premise, and/or Office 365 installation.

1.1 KYOCERA Microsoft connector Features

- Scan and print to and from SharePoint and OneDrive for Business Installations
- Scan and send emails from Exchange installations
- Fully compatible with Office 365 online versions of SharePoint, Exchange, and OneDrive for Business
- Index and search to find documents in SharePoint
- Single Sign-On
- Card Swipe Authentication

1.2 This Guide

This document describes the components, functions, installation requirements, and steps required to deploy and configure KYOCERA Microsoft connector effectively. Since KYOCERA Microsoft connector offers multiple workflow and configuration options, it is essential to understand these to deploy this solution correctly.

1.3 Components

The KYOCERA Microsoft connector consists of the KYOCERA Microsoft connector HyPAS application and KYOCERA Microsoft connector Server application. Additionally, there are two OCR versions available: **Basic OCR** and **OmniPage OCR**.

KYOCERA Microsoft connector **No OCR Package**	KYOCERA Microsoft connector **Basic OCR Package**	KYOCERA Microsoft connector **OmniPage OCR Package**
• PDF • TIF • High Comp PDF	• PDF • TIF • High Comp PDF • **Searchable PDF**	• PDF • TIF • High Comp PDF • Searchable PDF • **Word** • **Excel** • **TEXT** • **PowerPoint** • **XPS**

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1.3.1 Supported MFPs

For a full list of support MFP models, please refer to the Solutions Compatibility Chart on KDACentral.com.

1.3.2 Minimum Hardware Requirements

To ensure proper functionality, please make sure your server meets or exceeds the following specifications:

- 2 GHz or faster processor
- 1 GB of RAM
- 5 GB of available hard disk space

1.3.3 Supported Server Versions

- Windows 10 32/64-bit
- Windows Server 2008 R2 32/64-bit
- Windows Server 2012 R2 64-bit
- Windows Server 2016 64-bit

1.3.4 Supported SharePoint Server Versions

- SharePoint Server 2010
- SharePoint Server 2013
- SharePoint Server 2016
- SharePoint Online (Office 365)

1.3.5 Supported Exchange Server Versions

- Exchange Server 2010
- Exchange Server 2013
- Exchange Server 2016
- Exchange Online (Office 365)

1.3.6 Supported OneDrive for Business Versions

- OneDrive for Business (Office 365)

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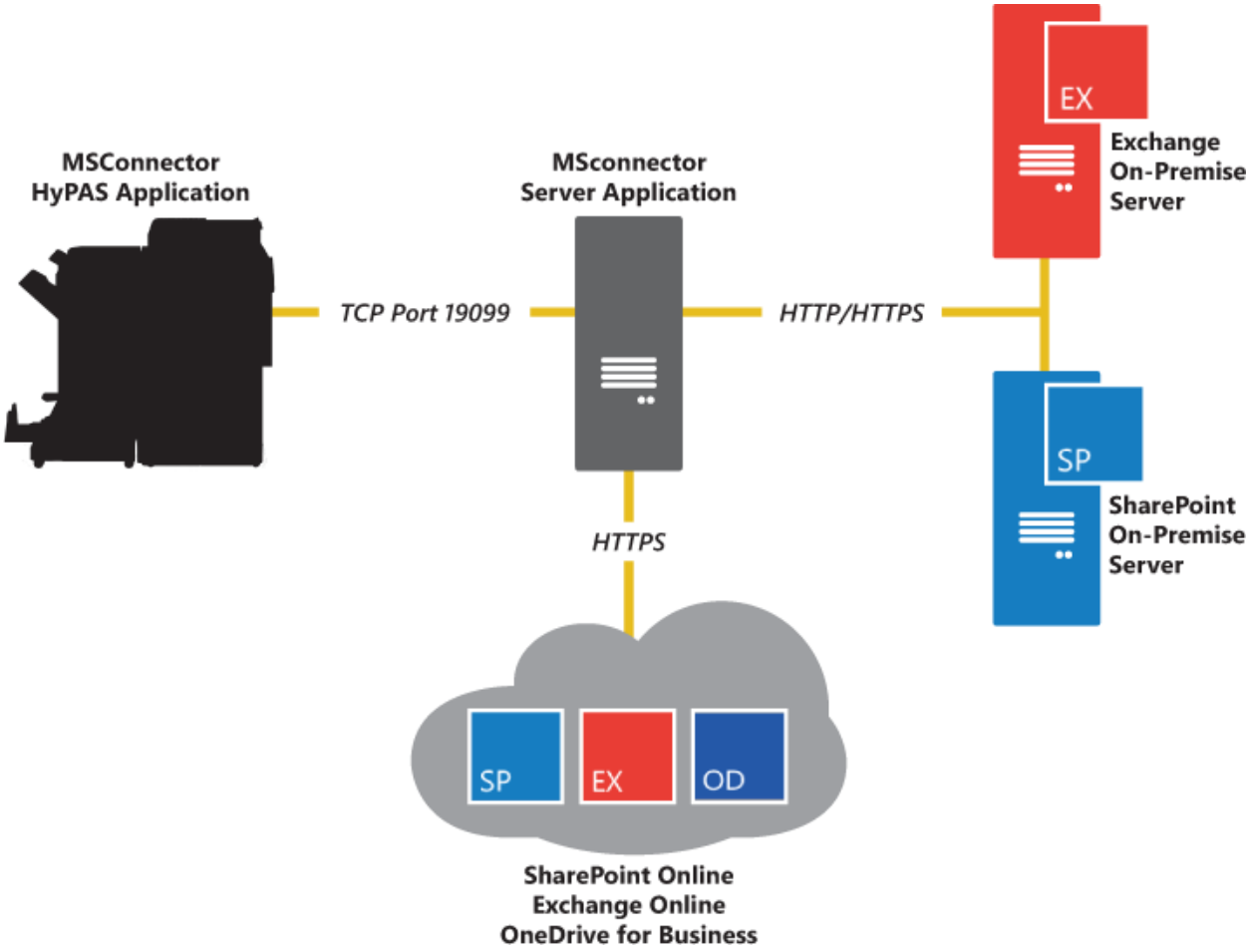
2. Network Architecture



Ports	• Default Port: TCP 19098 *Communication between the MFP and server application*
	• Server Registry Key location:
	  • 64-bit: HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Kyocera\MSConnector\ServerPort
	  • 32-bit: HKEY_LOCAL_MACHINE\SOFTWARE\Kyocera\MSConnector\ServerPort
	• Inbound Firewall Rule Name: Kyocera Microsoft Connector
	• Outbound Firewall Rule Name: Kyocera Microsoft Connector

Protocols	• Authentication, Index Data Entry: HTTPS • Image Data Transfer: HTTPS • Communication to OneDrive, SharePoint Online, Exchange Online: HTTPS • Communication to SharePoint On-Premise and Exchange On-Premise: HTTP/HTTPS (must be enabled on the server and configured in the server application)

NOTE: Information subject to change without notification

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2.1 Licensing

KYOCERA Microsoft connector requires the purchase of a software license from an authorized Kyocera or Copystar dealership.

You can evaluate the software, free of charge, for two 30-day trial periods. KYOCERA Microsoft connector will be disabled when the two trial periods expire, and you will be required to purchase a license key to be entered to continue using the application.

2.2 On-line Activation

KYOCERA Microsoft connector uses the same activation method as the Card Authentication Kit, Teaching Assistant, Data Security Kit and the Document Guard Kit. Following the purchase of a license certificate, the Product ID Number is sent in an email message. You will need these items as well as the **MFP Serial Number** when you access the License Page from KDAConnect.
You will be issued a unique Activation Key once you register your option. Print this page and input this Activation Key number on the panel of your **HyPAS-Enabled MFP or HyPAS-Capable MFP** to activate it.

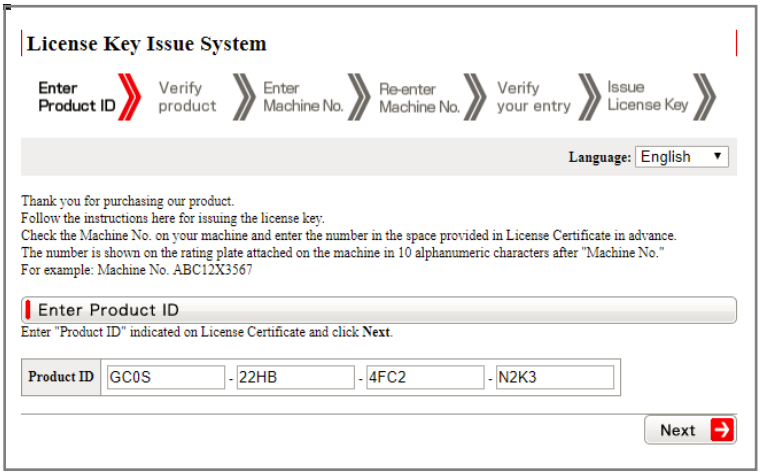
Login to the License Key Service on KDAConnect.com

What's Required:

- License Certificate
- Product ID Number
- MFP Serial Number

KYOCERA Microsoft connector Licensing Procedure

1. Enter the Product ID from the License Certificate, Click Next



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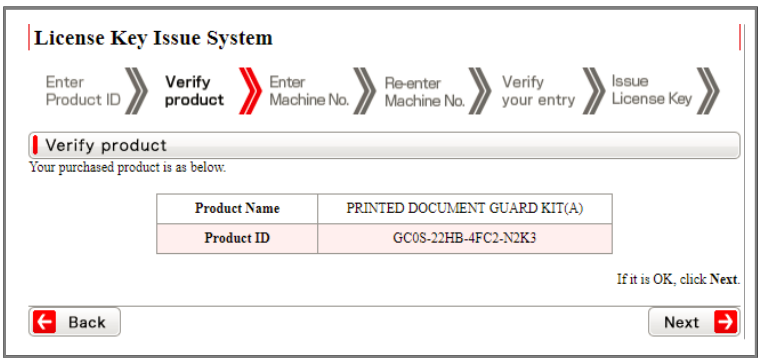
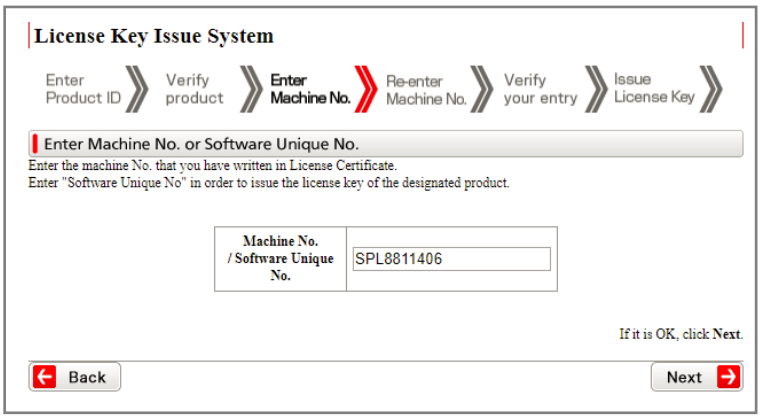
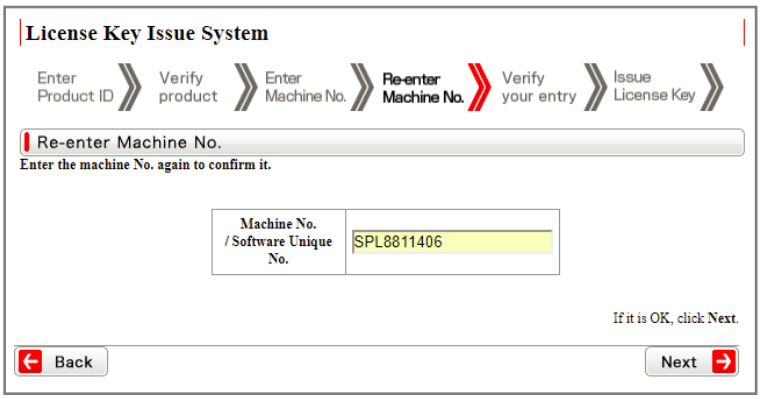
2. Your Product will be verified, Click Next.



3. Enter the MFP Serial Number, Click Next.



4. Re-enter the MFP Serial Number to confirm it, Click Next.



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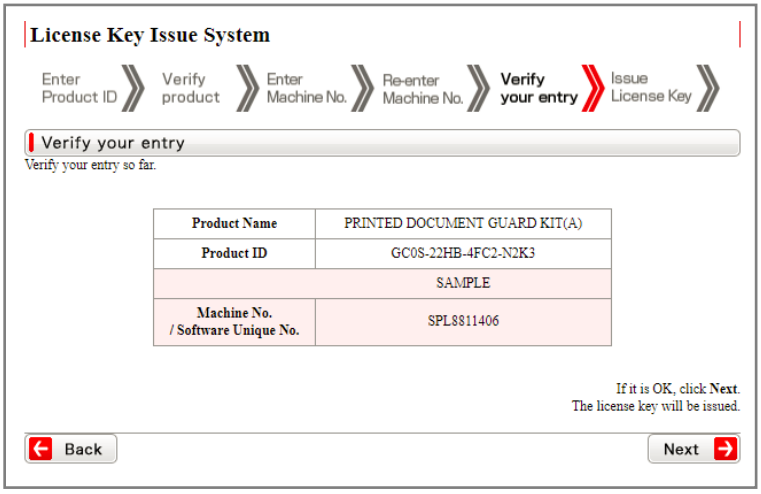
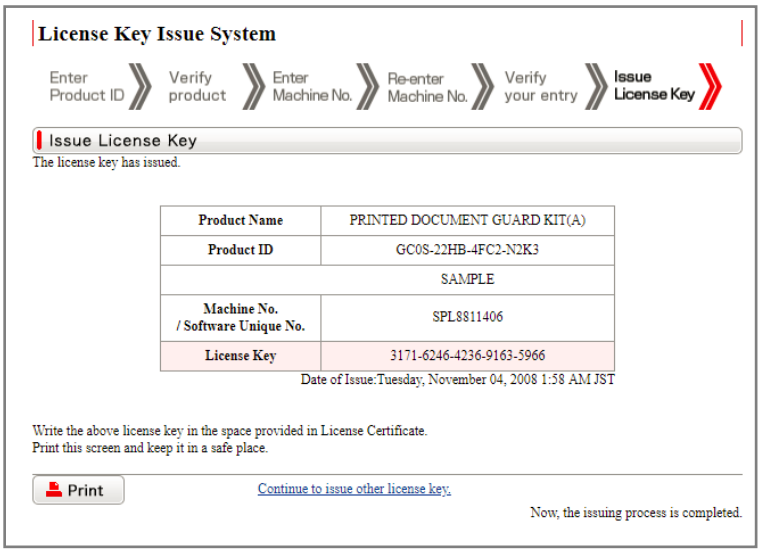
5. Your Information will be verified, Click Next.



6. Your License Key is issued.



7. Print the Page and input the License Key number on the panel of your HyPAS enabled MFP to activate your Device.

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3. Software Installation

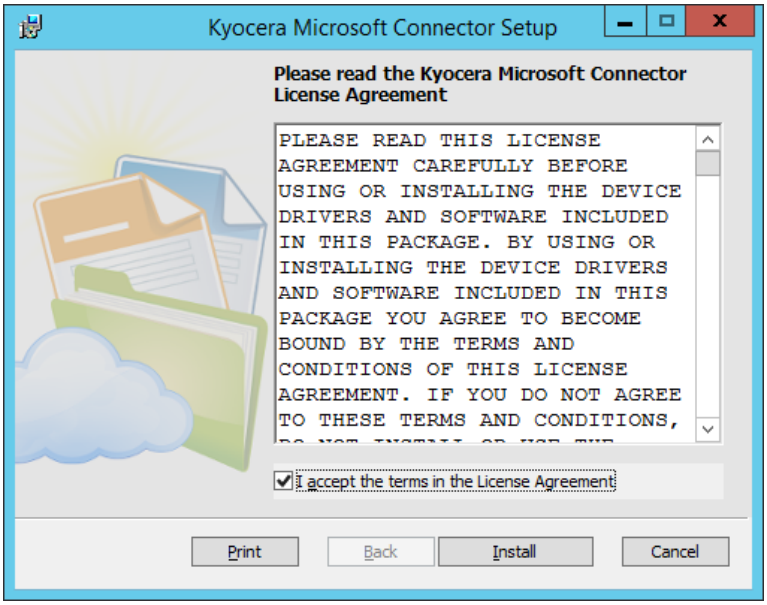
All required files can be downloaded from “KDACentral” Kyocera and Copystar Dealer Portal.

3.1 Prerequisites

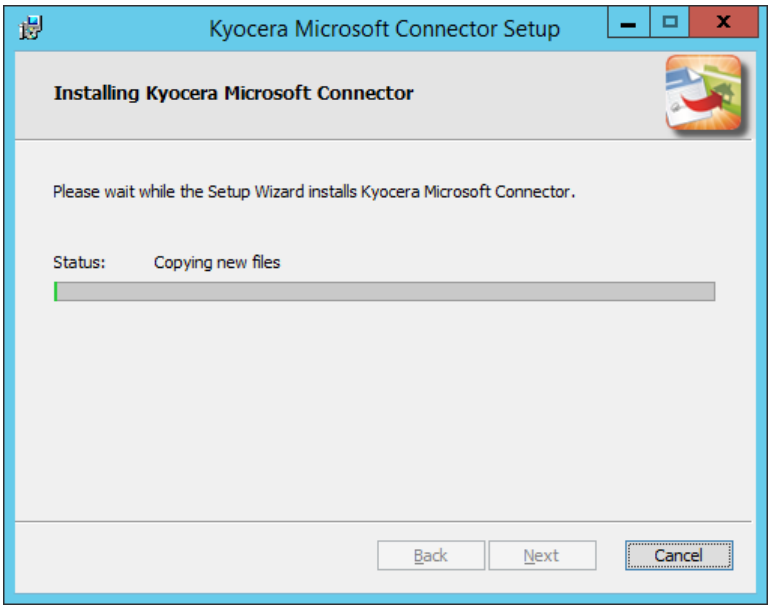
- Microsoft .NET Framework 4.6.2

3.2 Server Software Installation

1. Double-click on the KYOCERA Microsoft connector executable file to begin the installation wizard.
2. Read the KYOCERA Microsoft connector License Agreement, click the checkbox if you agree to the license terms, then click the Install button to begin the installation.



3. The installation will begin.



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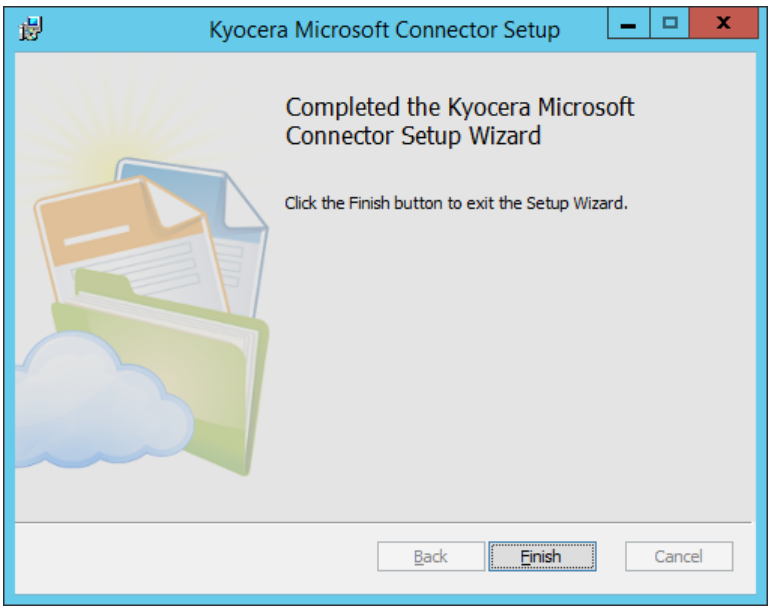
4. Once installation has finished successfully click the Finish button to exit the installer.



3.3 HyPAS Application File Installation

Two 30-day full-featured trials are allowed per MFP. For use beyond the trial period, each MFP installation must be activated with a unique license key obtained after purchasing the corresponding item code.

3.3.1 Installation on HyPAS-Capable MFPs

5. Download the KYOCERA Microsoft connector Package file from “KDAConnect” Kyocera and Copystar Dealer Portal and copy it to the root of a clean USB flash drive.
6. At the MFP control panel, open System Menu/Counter > Favorites/Application.
7. Log in as Administrator when prompted. The default login name is Admin and the default password is Admin (Note: Enter capital A when entering ‘Admin’ as both login name and password fields are case-sensitive).

8. Press Application button.

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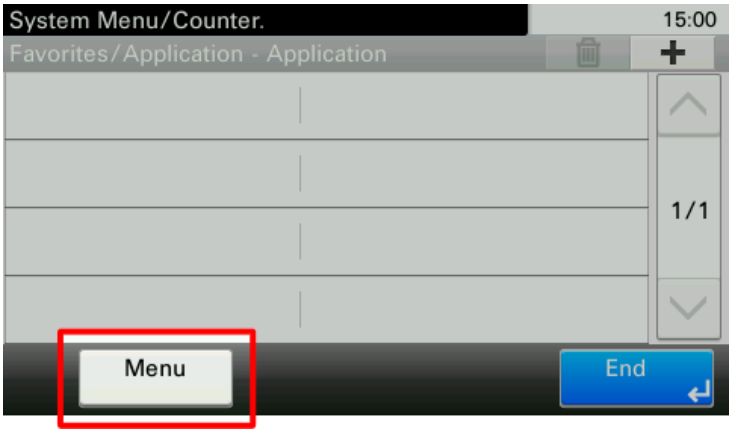
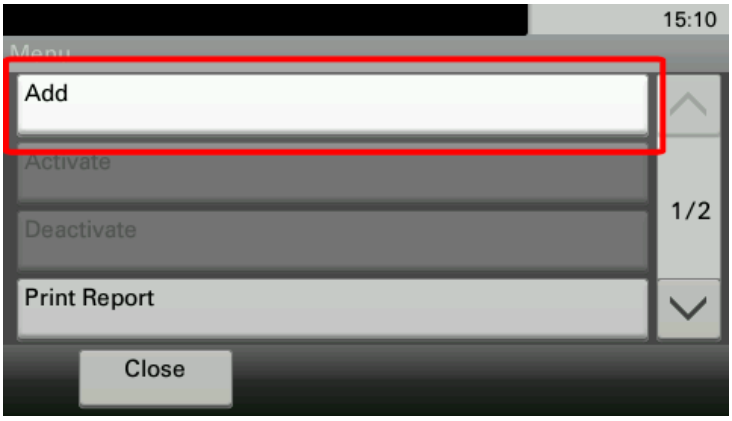
9. Press Menu button.



10. Press Add button.



11. Insert USB flash drive into the MFP.
12. A list showing the application will appear.
13. Select KYOCERA Microsoft connector and press Install.
14. After installation, press End to return to the Applications screen.
15. Select KYOCERA Microsoft connector and press Menu.
16. Press Activate. The MFP will prompt for Activation Mode. If a license key is available, enter the license key, then select Official. Otherwise, press the Trial button to activate one of the two 30-day trials. One trial can last for 30 days after which time the trial button will be disabled and the KYOCERA Microsoft connector service will no longer start. A license must be purchased from an authorized Kyocera or Copystar dealer to restart the KYOCERA Microsoft connector service.

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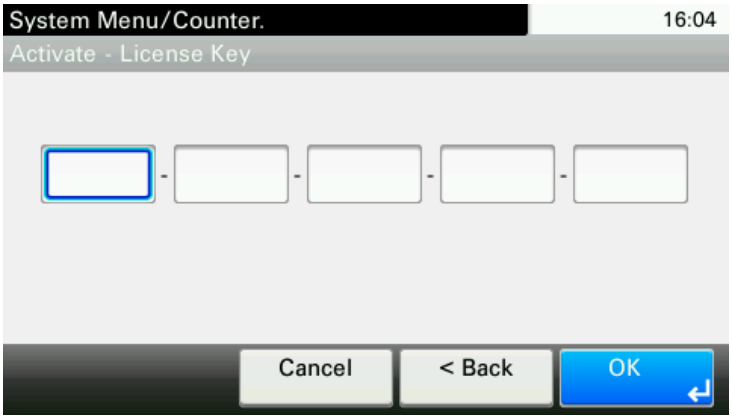
17. If the Official button is pressed, the MFP will prompt for a license key. Enter it using the keypad and press the OK button.

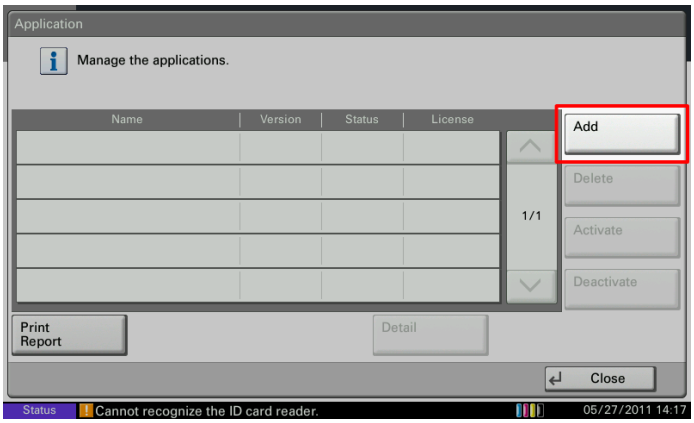
    NOTE: License key can only be generated by authorized Kyocera or Copystar dealers.



After KYOCERA Microsoft connector is activated successfully, it can be executed from the main Application screen (opened by pressing the Application key on the control panel).

3.3.2 Installation on HyPAS-Enabled MFPs

1. Download the KYOCERA Microsoft connector Package file from “KDAConnect” Kyocera and Copystar Dealer Portal and copy it to the root of a clean USB flash drive.
2. At the MFP control panel, open System Menu > Applications.
3. Log in as Administrator when prompted. The default login name is Admin and the default password is Admin (Note: Enter capital A when entering ‘Admin’ as both login name and password fields are case-sensitive).
4. Press the Add button.



5. Insert USB flash drive into the MFP.
6. A list showing the application will appear.
7. Select KYOCERA Microsoft connector and press Install.
8. After installation, press Close to return to the Application screen.

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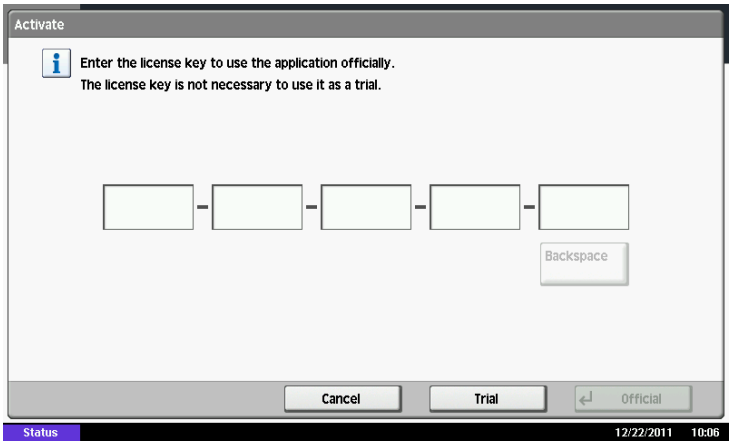
9. Select KYOCERA Microsoft connector and Press Activate. The MFP will prompt for Activation mode. If a license key is available, enter the license key, then select Official. Otherwise, press the Trial button to activate one of the two 30-day trials. One trial can last for 30 days after which time the trial button will be disabled and the KYOCERA Microsoft connector service will no longer start. A license must be purchased from an authorized Kyocera or Copystar dealer to restart the KYOCERA Microsoft connector service.



10. After KYOCERA Microsoft connector is activated successfully, it can be executed from the home screen.

NOTE: To setup KYOCERA Microsoft connector as the default screen of the MFP, open System Menu > Common Settings > Default Screen and select KYOCERA Microsoft connector.

3.4 Upgrading KYOCERA Microsoft connector HyPAS Application

Whenever the KYOCERA Microsoft connector HyPAS Application is upgraded, the MFP will need to be restarted for the application to function properly. Please make sure to restart the MFP after the KYOCERA Microsoft connector HyPAS application has been upgraded.

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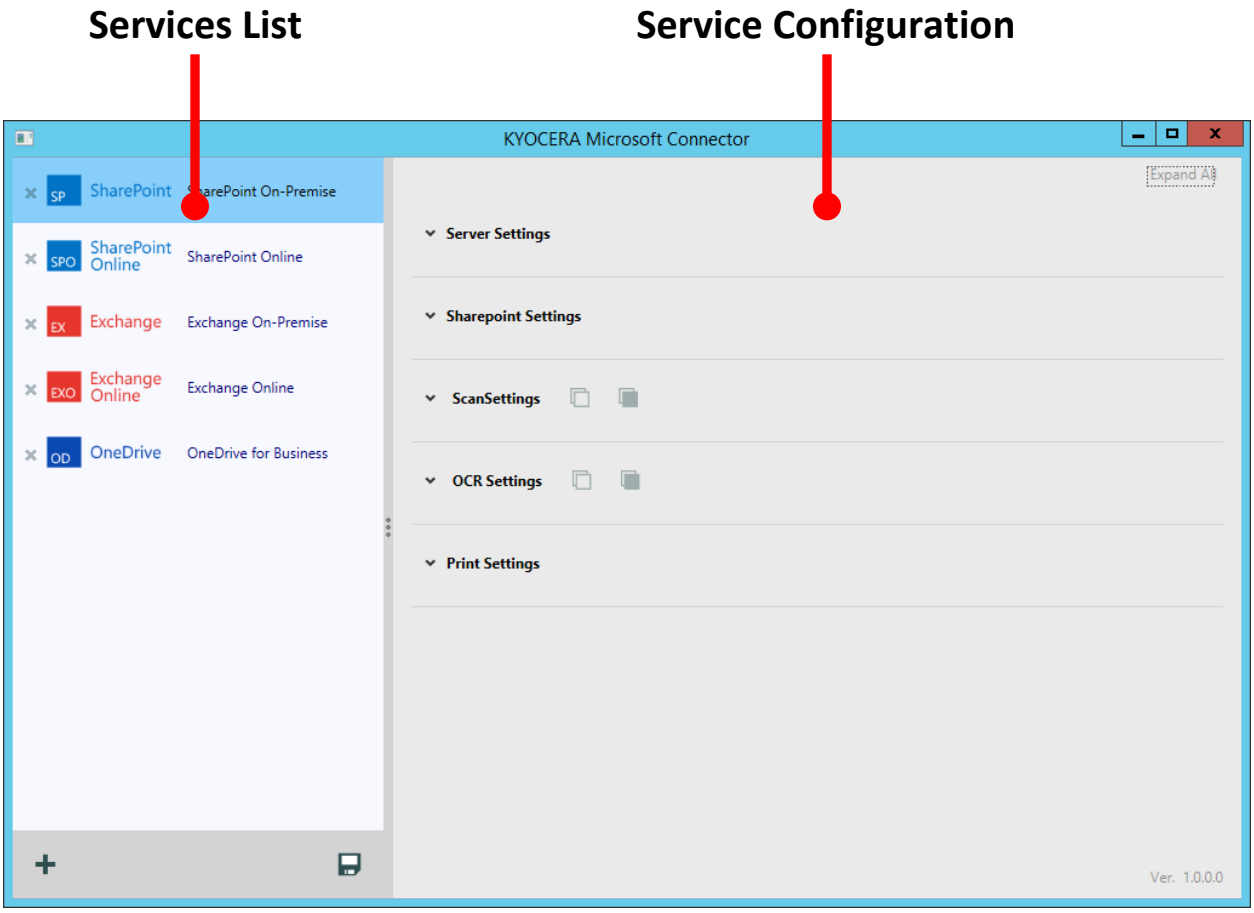
4. Configuration

4.1 KYOCERA Microsoft connector Settings Utility

The KYOCERA Microsoft connector Settings Utility is used add, remove, and configure the services to be used in the application. Each service instance should be given a unique name upon creation to help users differentiate between the services.

The Settings Utility consists of two “panes”: The Services List and the Service Configuration. All services need to be configured separately and settings need to be saved before moving on to another service. Scan Settings and OCR Settings can be copied and pasted on to another service by using the copy/past buttons to the right of the menu’s title.



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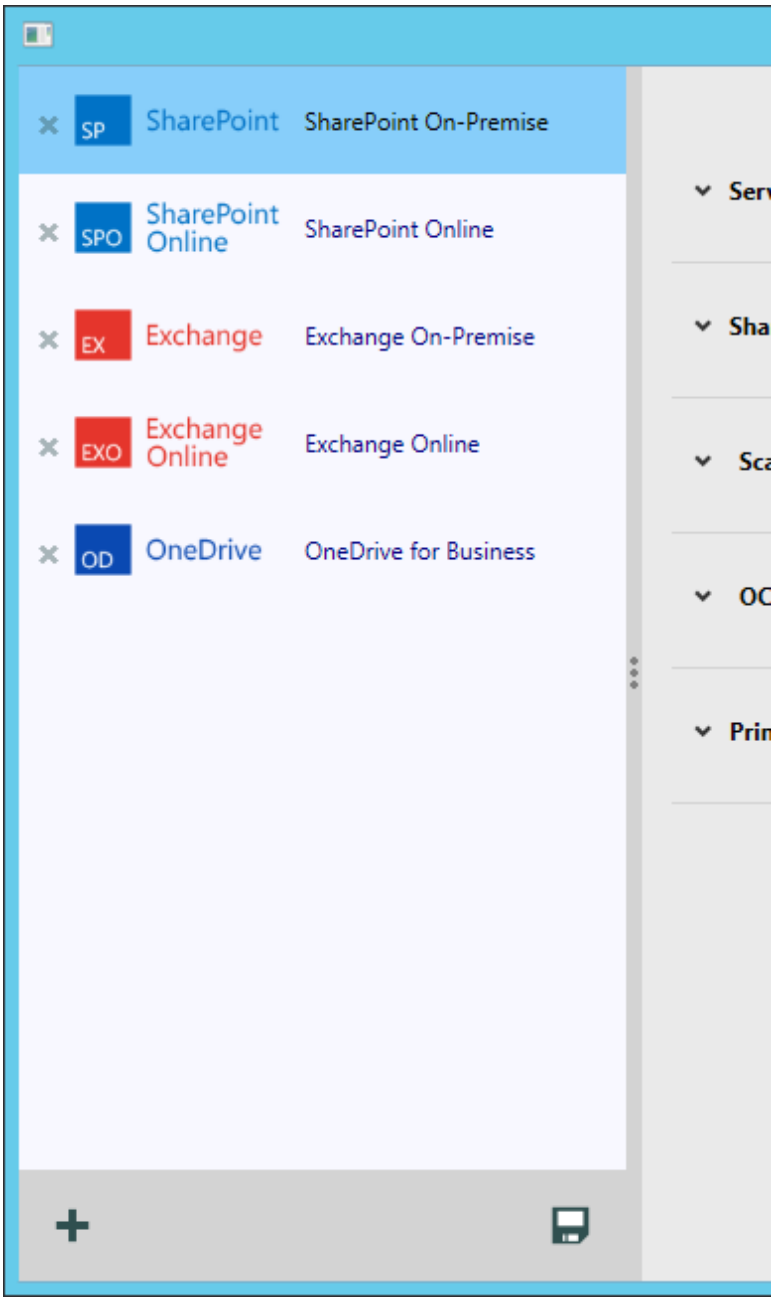
4.1.1 Service List

The Service List is simply a list of all the services that are created and configured in the KYOCERA Microsoft connector application. All services listed will be available for use on the MFP panel. Each listed service will have an icon to describe the type of service it is. Next to the icon will be a unique name used to differentiate one service from another on the MFP panel.



The bottom of the Service list has two buttons: **Add** (➕) and **Save** (💾). The Add button is used to add services to the list and the Save button is used to save changes. Existing services in the list can be removed by clicking the gray “x” button to the left of the service’s icon.

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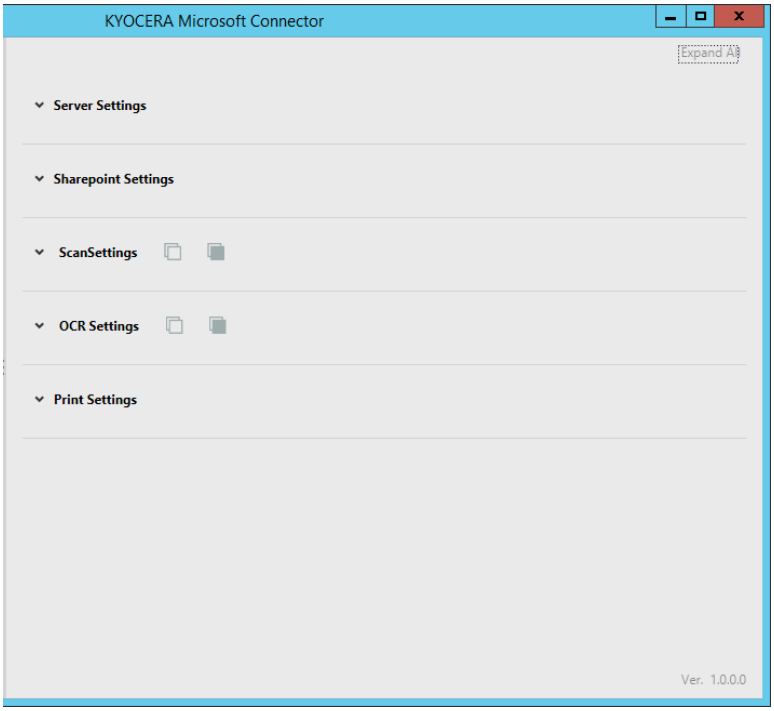
4.1.2 Service Configuration Pane

The Service Configuration pane provides expandable menus used to configure each individual service. These menus can be expanded one-by-one or all menus can be expanded and collapsed simultaneously by using the Expand All/Collapse All button at the top right-hand corner of the pane.

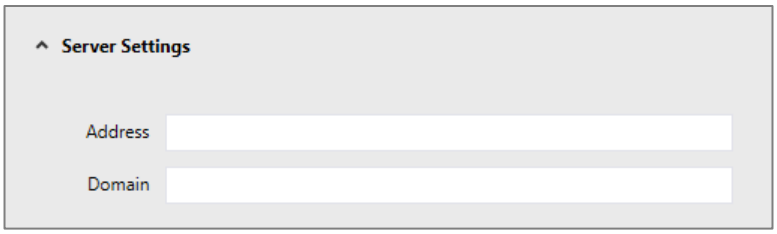


4.1.3 Server Settings

Server settings configuration is used to setup the connection to the separate Microsoft services. Depending on which type of service you are using (on-premise vs. online) the configuration options are different. Please refer to the service specific sections of this guide for more details.

- SharePoint/SharePoint Online
- Exchange/Exchange Online
- OneDrive for Business

On-Premise Server Settings



Online (Office 365) Server Settings

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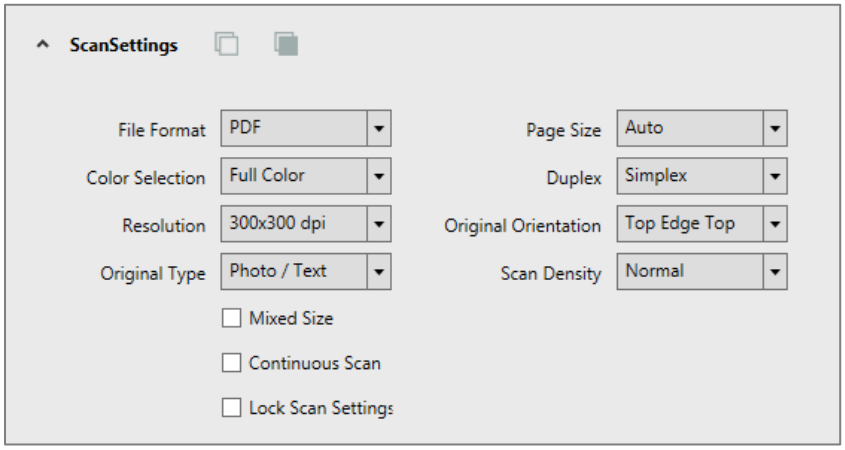
4.1.4 Service Specific Settings

The Service Settings menu is used to configure service specific settings. The configurable options are the same for the on-premise and online versions of SharePoint and Exchange servers. OneDrive does not have any service specific settings, so this menu will appear when a OneDrive service is selected.

4.1.5 Scan Settings

Scan settings are set on a service specific basis which means each service will need to have the default scan settings set. However, scan settings from one service can be copied then pasted on to another service by using the **Copy** ( ) and **Paste** ( ) buttons to the right of the menu name.



Copy/Paste Scan Settings Procedure

1. Select the service from the Service List you wish to copy the scan settings ***FROM***
2. Click the **Copy** ( ) button
3. Select the service you will to copy the Scan Settings ***TO***
4. Click the **Paste** ( ) button

File Format	▪ TIFF ▪ PDF ▪ Searchable PDF *† ▪ XPS	▪ Word † ▪ Excel † ▪ Text † ▪ PowerPoint †	* Available with Basic OCR package † Available with OmniPage OCR package
Page Size	▪ Auto ▪ Letter ▪ Letter R ▪ Legal (8.5” x 14”) ▪ Statement ▪ Statement R ▪ A3	▪ Ledger (11” x 17”) ▪ A4 ▪ A4 R ▪ A5 ▪ A5 R ▪ B5 ▪ B5 R	▪ B6 ▪ B6 R ▪ 16K ▪ 16K R ▪ Oficio ▪ Folio
Color Selection	▪ Monochrome ▪ Grayscale ▪ Full Color	▪ Auto (Color/BW) ▪ Auto (Color/Gray)	

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Duplex	▪ Simplex ▪ Duplex
Resolution	▪ 200 x 200 dpi ▪ 400 x 400 dpi ▪ 300 x 300 dpi ▪ 600 x 600 dpi
Original Orientation	▪ Top Edge Top ▪ Top Edge Left
Original Type	▪ Photo ▪ Text ▪ Photo/Text ▪ For OCR
Scan Density	*Lightest* -3 -2 -1 Normal +1 +2 +3 *Darkest*
Mixed Size	▪ Checked = Allow Mixed Sizes ▪ Unchecked = No Mixed Sizes
Continuous Scan	▪ Checked = ON ▪ Unchecked = OFF
Lock Scan Settings	▪ Checked = File Format, Color Selection, Resolution, and Original Type settings will be gray-out and unavailable on the MFP panel ▪ Unchecked = All Scan settings will be available on the MFP panel

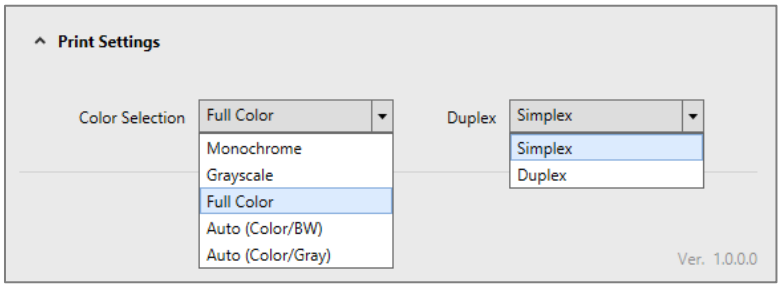
4.1.6 OCR Settings

Like Scan Settings, OCR Settings are also set on a service specific basis which means each service will need to have the default OCR Settings set. However, OCR Settings from one service can be copied then pasted on to another service by using the **Copy** ( ) and **Paste** ( ) buttons to the right of the menu name. **Exchange and Exchange Online services do not offer OCR functionality.**

1. Select the service from the Service List you wish to copy the OCR settings ***FROM***
2. Click the **Copy** ( ) button
3. Select the service you will to copy the OCR Settings ***TO***
4. Click the **Paste** ( ) button

4.1.7 Print Settings

Users can print PDF files from SharePoint, SharePoint Online, and OneDrive services. **Exchange and Exchange Online services do not offer the print functionality.**



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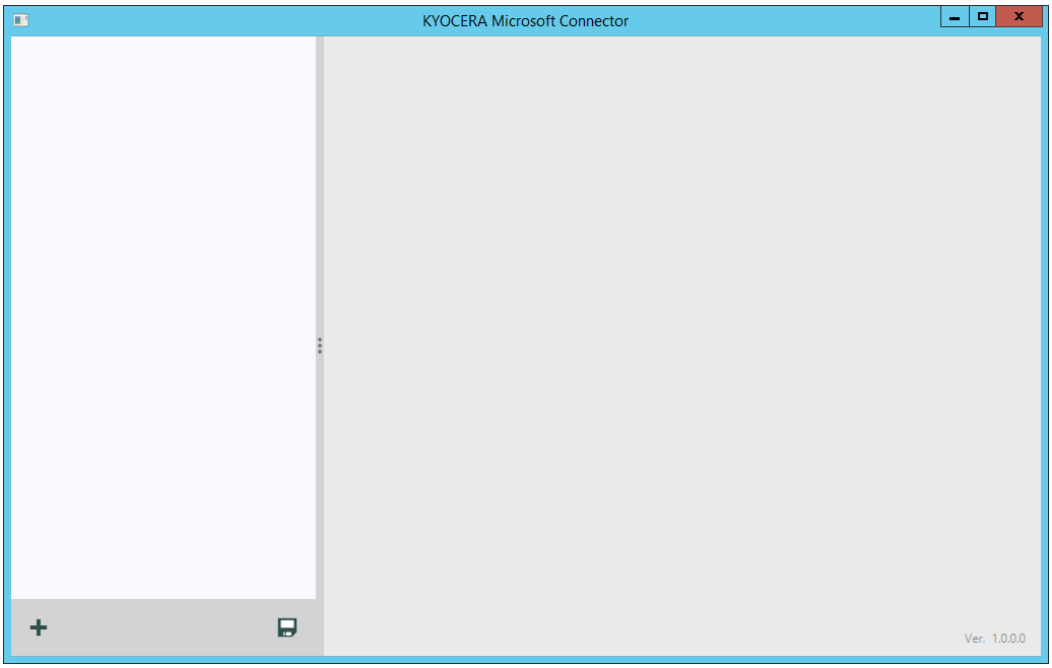
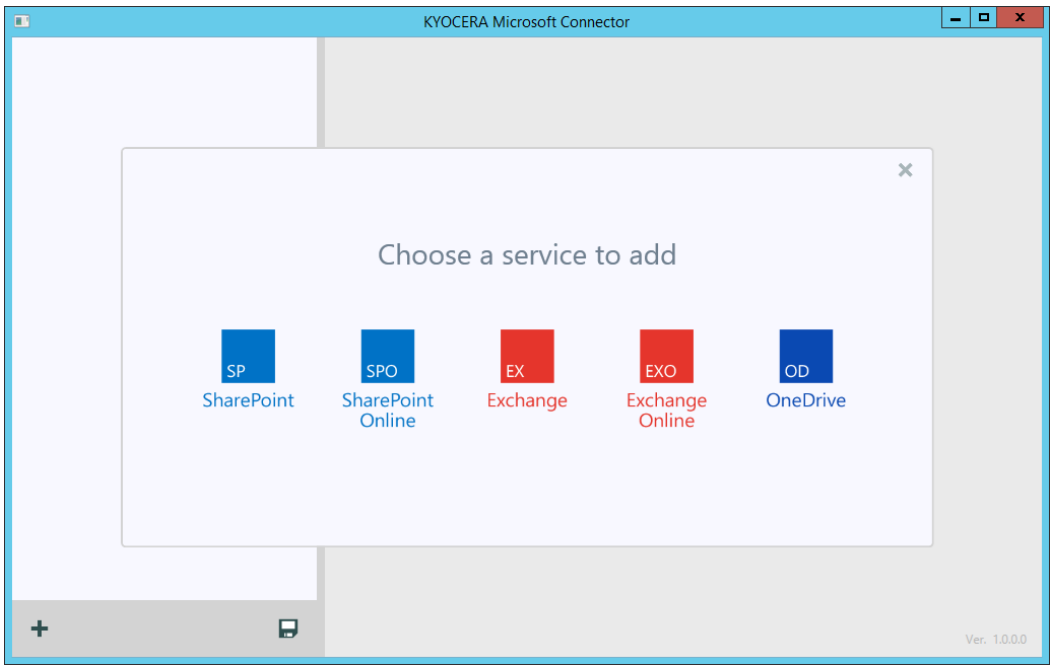
4.2 Adding a Service

1. Open the KYOCERA Microsoft connector Settings Utility. You will see an unpopulated panel of servers as there are no default services are configured in the application.



2. Click the **Add Button (➕)** on the lower left-hand corner of the Settings Utility window to open the service list. Then click a service to add it to the service list.



3. Once the service is added, double-click on the name to rename the service instance. Please provide a unique name as this will be what is displayed on the MFP panel.

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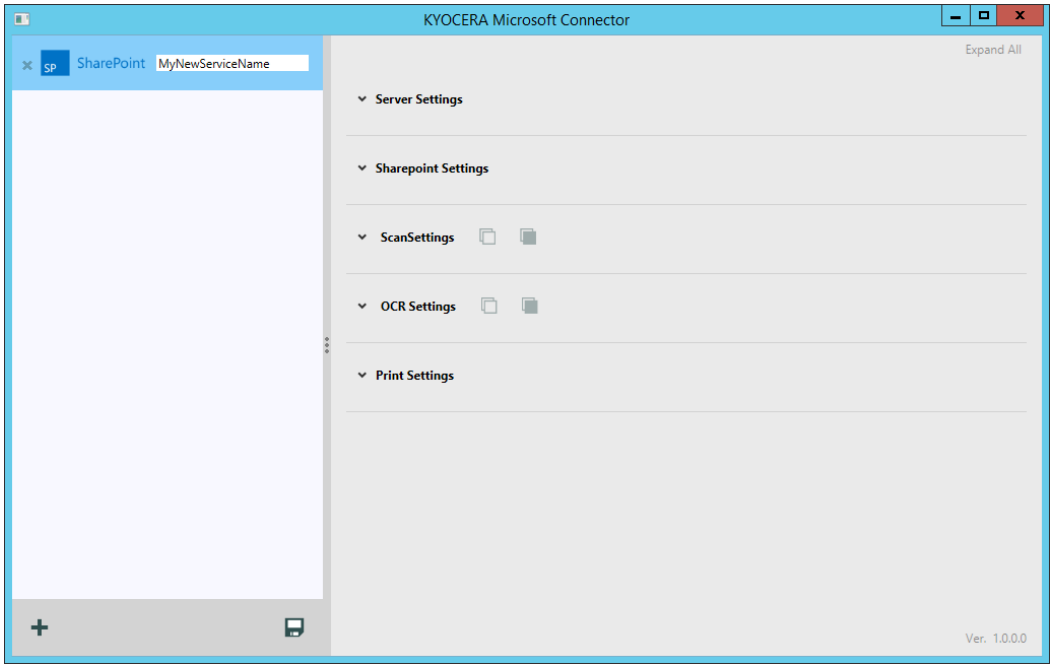
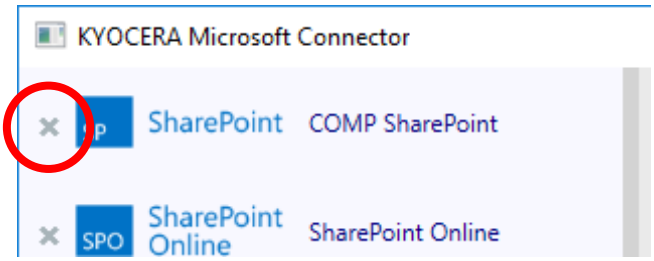


4. Use the expandable menus on the right side of the window to configure the service as necessary. One configuration is complete, save your settings by clicking the **Save button ( )** on the lower right-hand side of the Services list. The word “Saved!” will momentarily appear next to the save icon.

4.3 Removing a Service

To remove a service simply click the **Remove button ( )** to the left of the service item.

Services must be removed on an individual basis.



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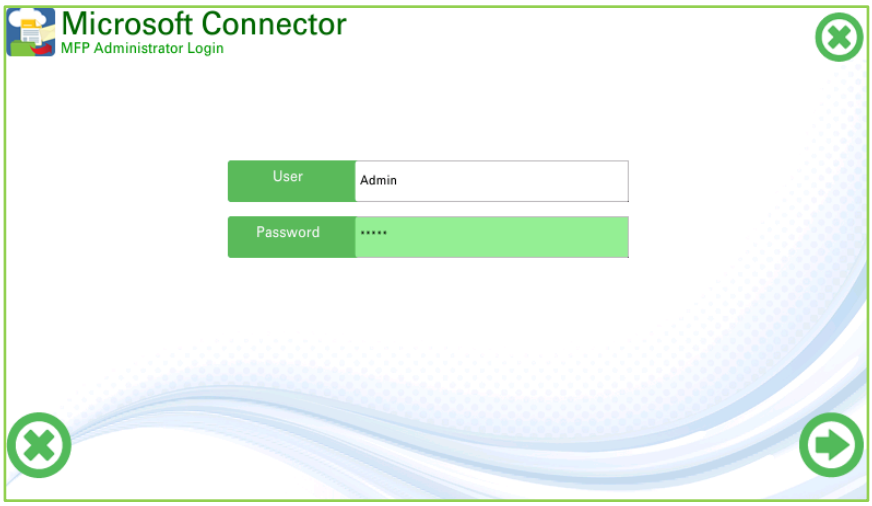
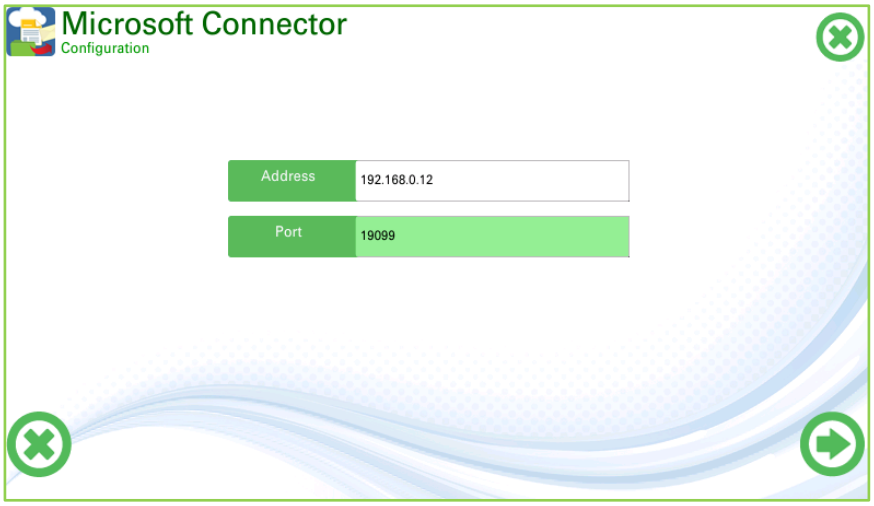
4.4 MFP Configuration

1. Click on the Application Icon on the MFP home screen.

2. Enter the MFP Administrator user and password. The default Administrator username and password is “Admin” and “Admin” respectively.



3. Enter the IPv4 address of the server the KYOCERA Microsoft connector application is running on. The **default port is 19097** and should not need to be changed. Press the Next button to save settings.



4. If the connection is successful, you will be shown the list of configured Microsoft services.

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4.5 SharePoint/SharePoint Online Settings

4.5.1 On-Premise Server

- **Address:** The SharePoint server site's URL
  - Must contain the root location of the site in the SharePoint Server
  - To see sub sites and document libraries from a site enter the relative URL and not the site description
  - SharePoint service cannot connect directly to a document library, form library, or similar. Only enter site addresses

Example SharePoint URL: **http://mysharepointsite/sites/Marketing/EastCoast/EastCoastDocs**

Main Site	**Second Site**	**Subsite**	**Document Library**
mysharepointsite	Marketing	EastCoast	EastCoastDocs

To connect to…	**Enter in to the *Address* field…**
Main Site *mysharepointsite*	mysharepointsite
Second Site *Marketing*	mysharepointsite/sites/Marketing
Subsite *EastCoast*	mysharepointsite/sites/Marketing/EastCoast
Document Library *EastCoastDocs*	*Cannot connect directly to document libraries or similar*

- Some services like search may not work when IP address is used instead of hostname for the SharePoint Server address. Hence **it is always recommended to use the host name of the server**.
- SSL
  - If the SharePoint server is setup to accept secure connections (HTTPS), the connector can also use the secure channel to communicate with the server.
  - Microsoft SharePoint Server's certificate must be installed as a Trusted Root Certificate on the computer hosting the SharePoint Connector. Otherwise, the connector will not be able to communicate with the server.

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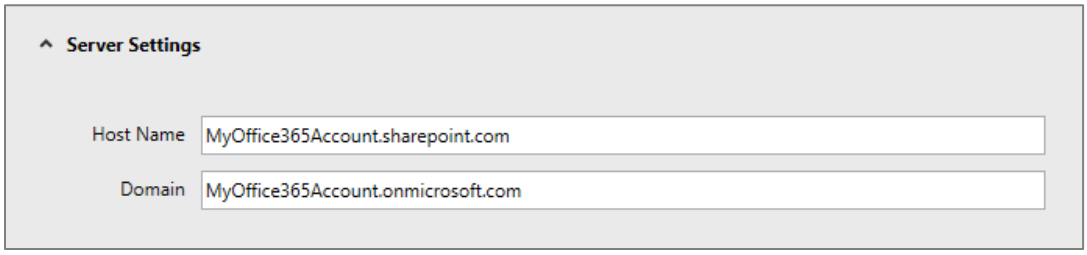
- For troubleshooting SSL communication, please first ensure that the SharePoint server can be accessed from a web browser using a *https://...* URL without any errors.

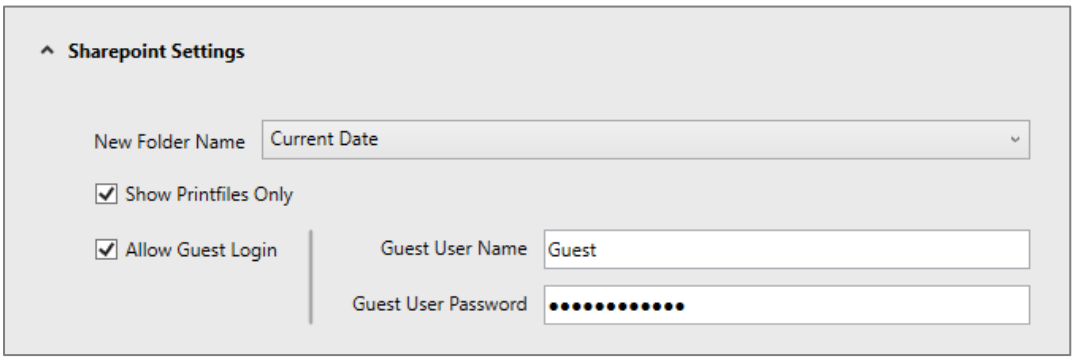
- **Port:** The port used for communication
- **Domain:** the domain appended to the user name when authenticating

4.5.2 Online Server



- **Address:** The URL of the Office365 SharePoint Site. Since Office 365 uses SSL by default the prefix "https://" will automatically be appended to the URL when making a connection and will be omitted if entered in to the text box.
- **Domain:** The domain name that will be appended to the user name when authenticating.

4.5.3 SharePoint Settings



- **New Folder Name:** The name given to folders created through the HyPAS application
- **Show Printfiles Only:** Check this box to only display printable files. Leave this box unchecked to show all files in the Document Library or List.
- **Allow Guest Login:** Check this box to allow a guest login option
  - **Guest User Name:** User name assigned to the guest account
  - **Guest User Password:** Password associated with the Guest User Name

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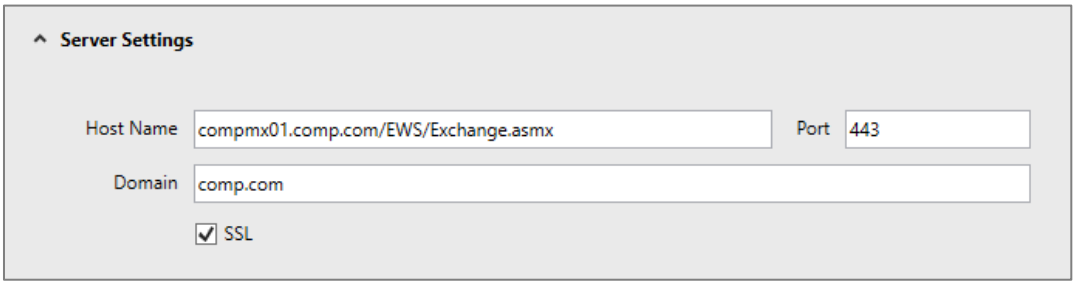
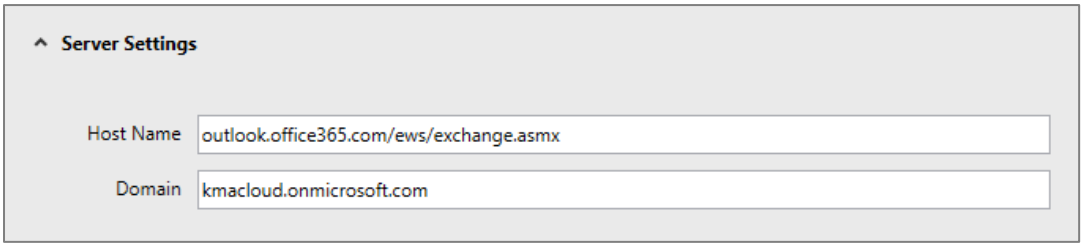
4.6 Exchange/Exchange Online Settings

4.6.1 On-Premise Server



- **Address:** The External URL for the Exchange Web Services (EWS) virtual directory. This can be obtained by the Exchange Server System Administrator. The prefix “http://” or “https://” will automatically be appended to the URL when making a connection and will be omitted if entered in to the text box.
- **Port:** Port used for communication to the Exchange server.
- **Domain:** The domain that will be appended to the user name for authentication.
- **SSL:** Check this box if the use of SSL is required. This will determine if the prefix “http://” or “https://” will be added to the URL.

4.6.2 Online Server



- **Address:** The URL for remotely connecting to the Exchange Online server. The Exchange Online for Office 365 URL is always **outlook.office365.com/ews/exchange.asmx**. The prefix “https://” will automatically be appended to the URL when making a connection and will be omitted if entered in to the text box.
- **Domain:** The domain name that will be appended to the user name when authenticating.

4.6.3 Exchange Settings

Default values for the Exchange email’s Subject, Body, and File Name can be set through the connector although it is not necessary to set defaults. If left blank the user will be required to enter these values on the MFP panel.

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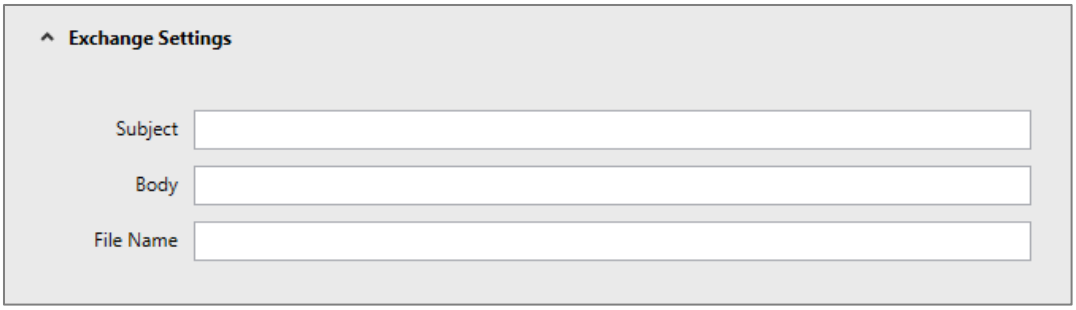
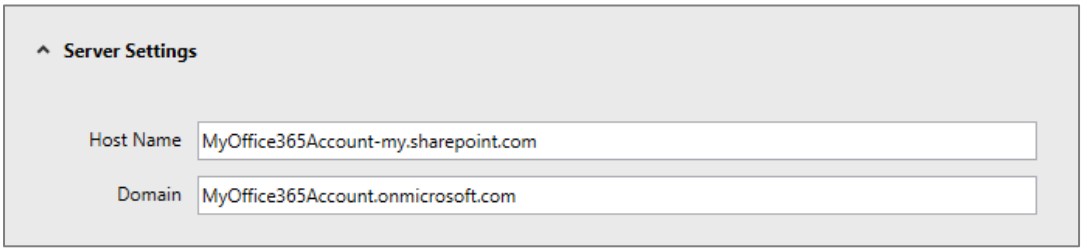


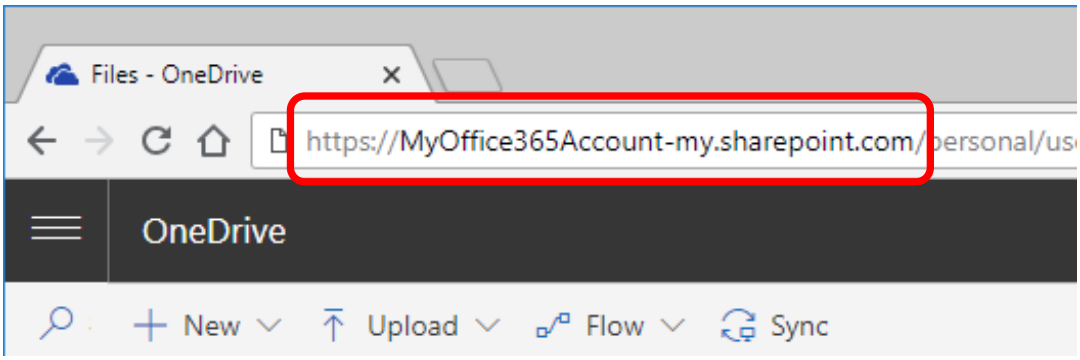
4.7 OneDrive for Business Settings

4.7.1 Server Settings (Online Only)

KYOCERA Microsoft connector only supports OneDrive for Business as part of an Office 365 account. Individual OneDrive accounts are not supported in the KYOCERA Microsoft connector application.



- **Address:** The address can be found by navigating to your OneDrive for Business account on a web browser. Typically, the URL will be **https://**<Office365Domain>**-my.sharepoint.com**. The prefix “https://” will automatically be appended to the URL when making a connection and will be omitted if entered in to the text box.



- **Domain:** The domain will be the Office 365 domain

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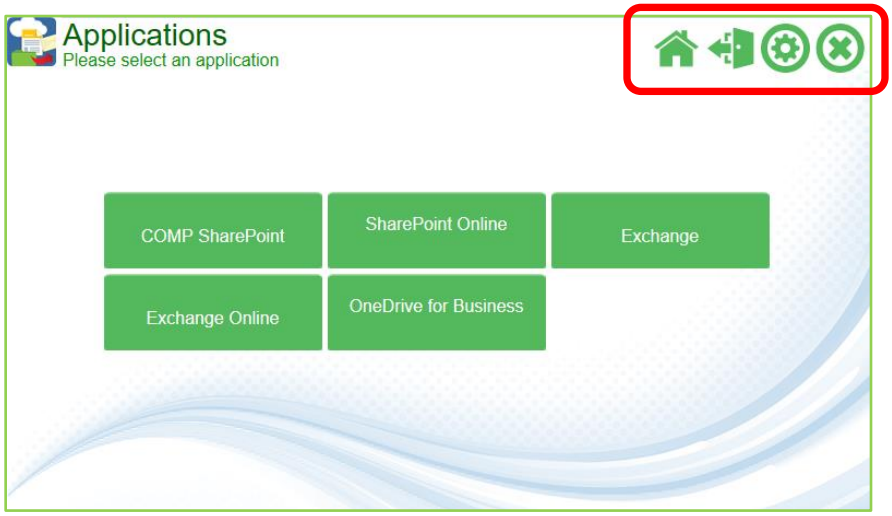
5. MFP Operation

NOTE: Scans uploaded to Office 365 installations have a file size limitation of 250Mb.

5.1 Panel Top Menu Icons

Once the KYOCERA Microsoft connector is configured users will be able to see four (4) icons at the very top-right of the panel. Most of these icons will be visible and can be used throughout the KYOCERA Microsoft connector application.



Home	Returns the user to the KYOCERA Microsoft connector home screen. **Users will not be logged out** so the currently logged in user's credentials will be used when selecting other services. If those credentials are invalid the user will be shown the authentication page.
Log Out	Logs the user out of the current session. The user will need to either their credentials again to use another service.
Configuration	Enters the Configuration page of the application. The currently logged in user does not have administrator rights the user will be prompted to enter administrator credentials to proceed.
Close Application	Closes the application windows and returns the user to the MFP's main screen or authentication screen.
Information	Used to view any error information for either a SharePoint service or OneDrive service. No information will be shown if used inside of an Exchange service.

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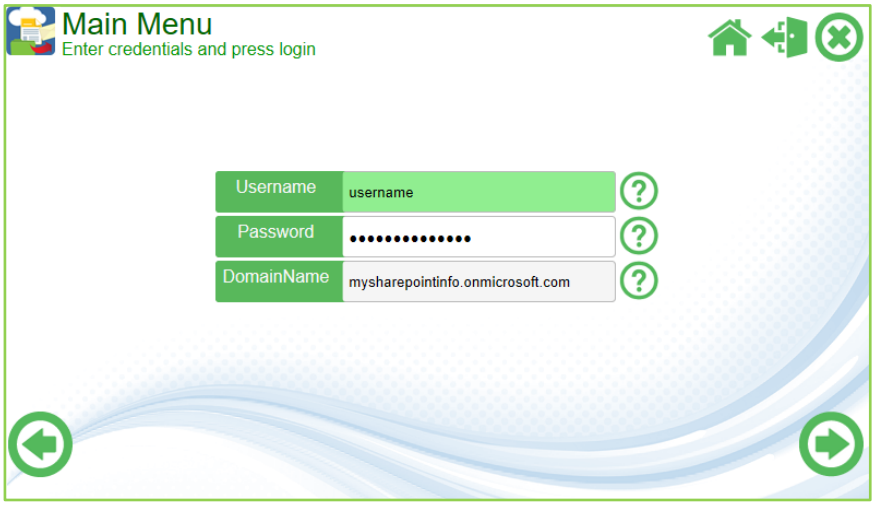
5.2 Logging In

1. Upon opening the KYOCERA Microsoft connector application on the MFP, user's will be showing a list of all available services configured through the KYOCERA Microsoft connector server application. If only one service is configured users will be shown the log in page for that service

2. User's will enter their username and respective password in the indicated fields. The "DomainName" field will be displayed but uneditable.

3. One successfully authenticated users will be shown the first page of the service.



5.3 Logging Out

User can use the **Log Out button (** **)** located on the upper right-hand corner of the application to log completely log out of all services and return to the KYOCERA Microsoft connector Home Page.

Alternatively, users can use the **Home button (** **)** to return to the KYOCERA Microsoft connector Home Page. Using the Home Button means the user is not logged out so selecting another service will automatically log the user in using the same credentials. If the credentials are different for that service, the user will be prompted to enter a username and password.

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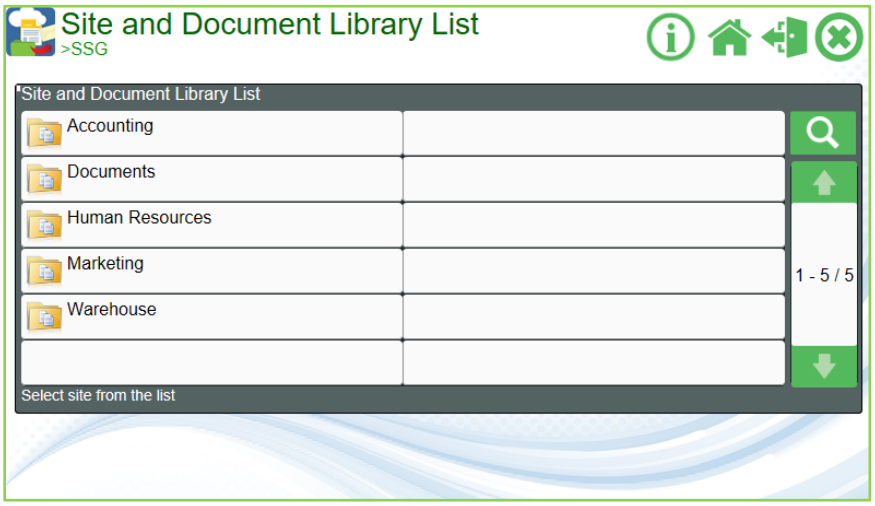
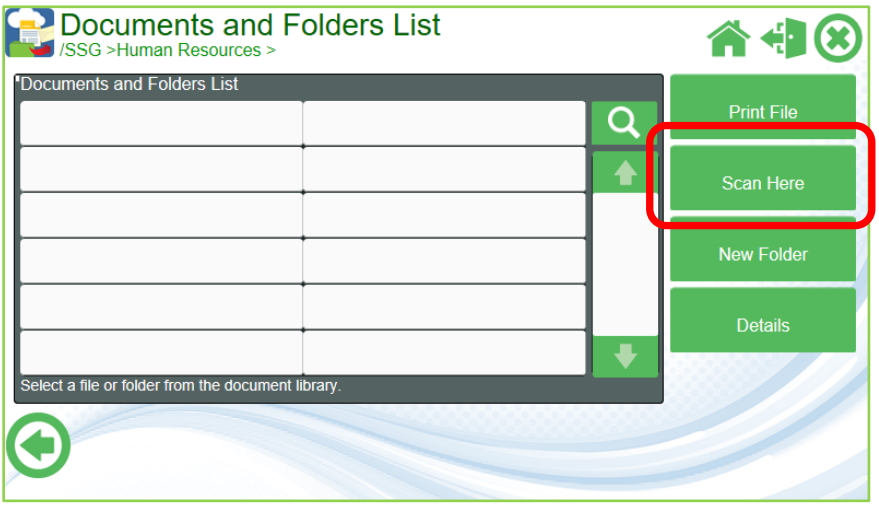
5.4 SharePoint/SharePoint Online

5.4.1 Scan to

1. After logging in to the SharePoint or SharePoint Online service, select a subsite or document library from the displayed list. Users can continue to traverse through the folder structure until they reach their desired depth.



2. Once the desired location is found, press the **Scan Here button**.



3. Fill in all required and optional index data fields. Required fields will have an asterisk (*) to the left of the field name. Press the Next button to continue.

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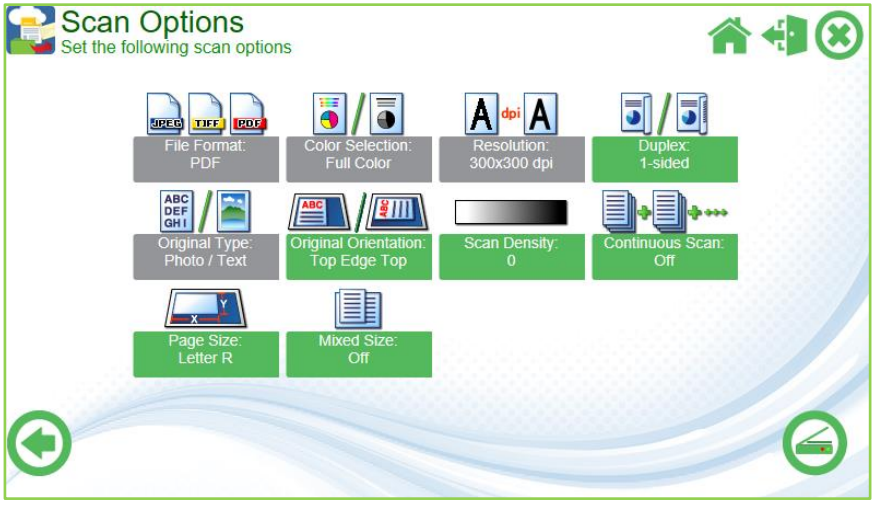
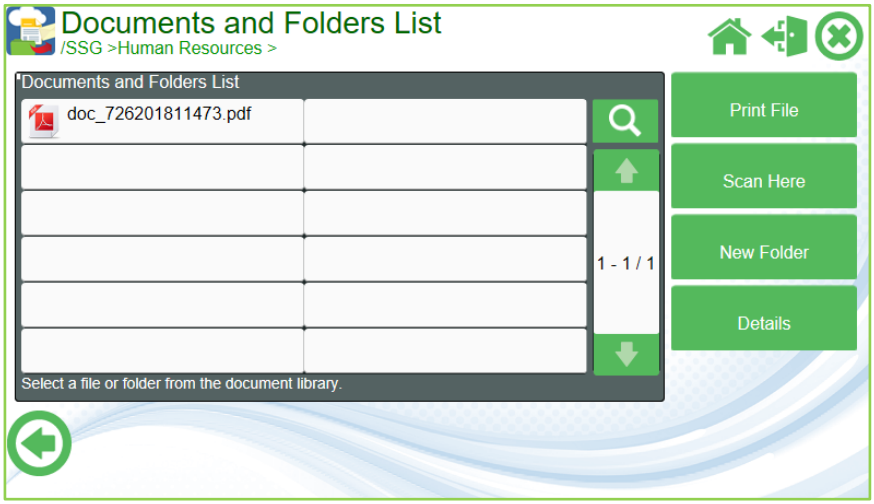
4. Change any scan settings if available. Locked scan settings will have a gray button and be unavailable. Press the Scan button to begin scanning.

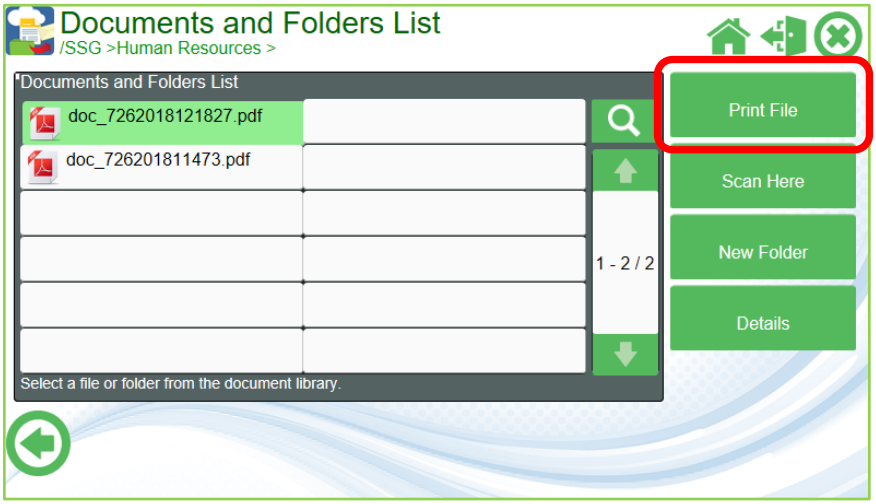


Once scanning is complete the user will be returned to where they scanned from.



5.4.2 Print From

1. After logging in to the SharePoint or SharePoint Online service, select the PDF to print then press the Print File button. Only one PDF at a time can be selected.



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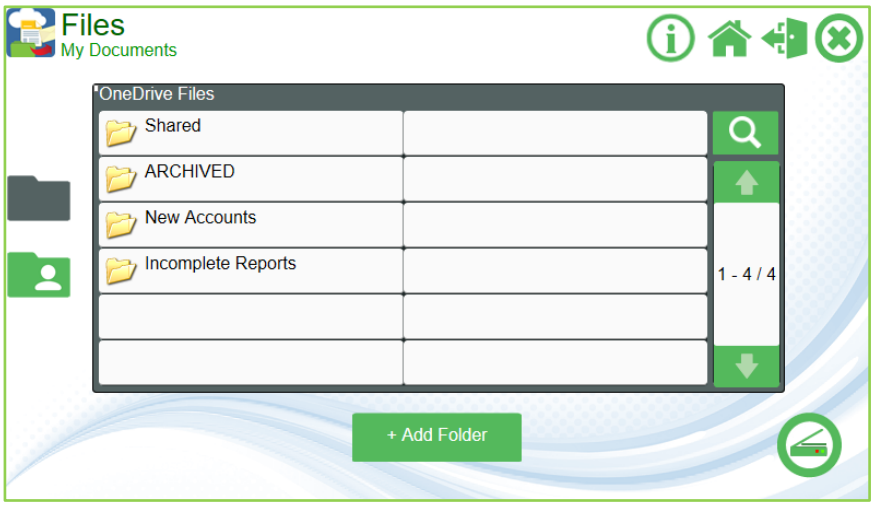
2. Enter number of copies and choose a color section and/or duplex mode. Press the **Next button** to begin printing.

5.5 OneDrive for Business

5.5.1 Scan to

1. After logging in to the OneDrive for Business service, users can traverse through the document structure until they reach their desired depth. They can also switch between viewing their private folders/files and shared folder/files by selecting the folder buttons on the left-hand side of the panel screen:



Private Folders/Files	Will display all folders and files in the OneDrive for Business account.
Shared Folders/Files	Will display only the shared folders and files in the OneDrive for Business account.

Users can also use the Add Folder Button to create a folder at the current folder level. When ready press the **Scan button**.

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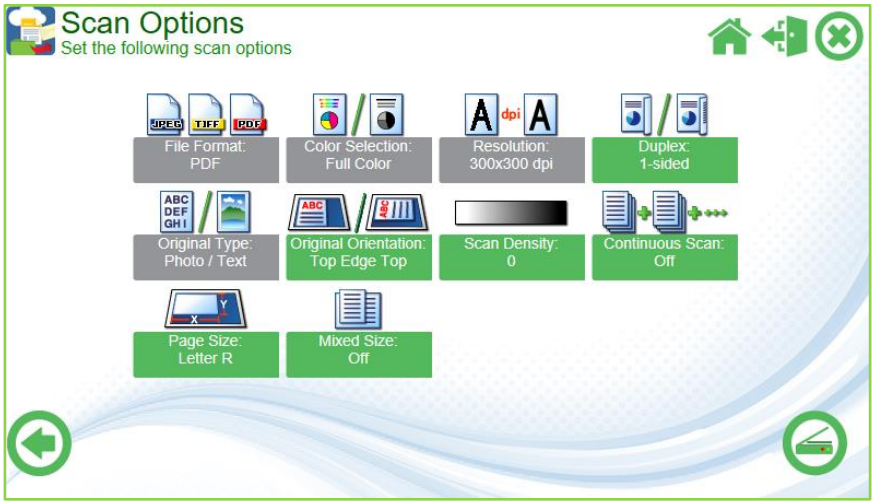
2. Enter a file name (required) then press the **Next button**.

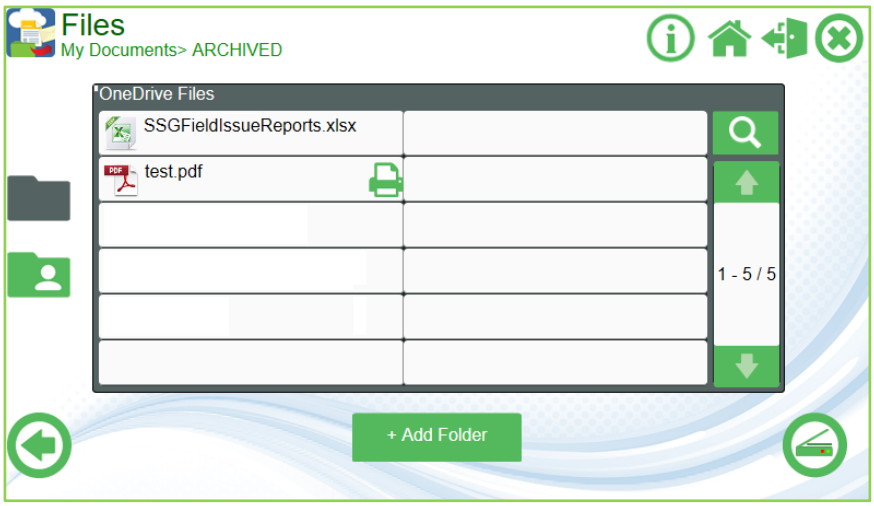
3. Change any scan settings if available. Locked scan settings will have a gray button and be unavailable. Press the **Scan button** to begin scanning.



5.5.2 Print From

1. After logging in to the OneDrive for Business service, traverse through the document structure until the desired document is reached

2. Once the document is found, press the **Print button ( )** to the right of the document title.



NOTE: Only documents that can be printed through the connector will have a print icon.

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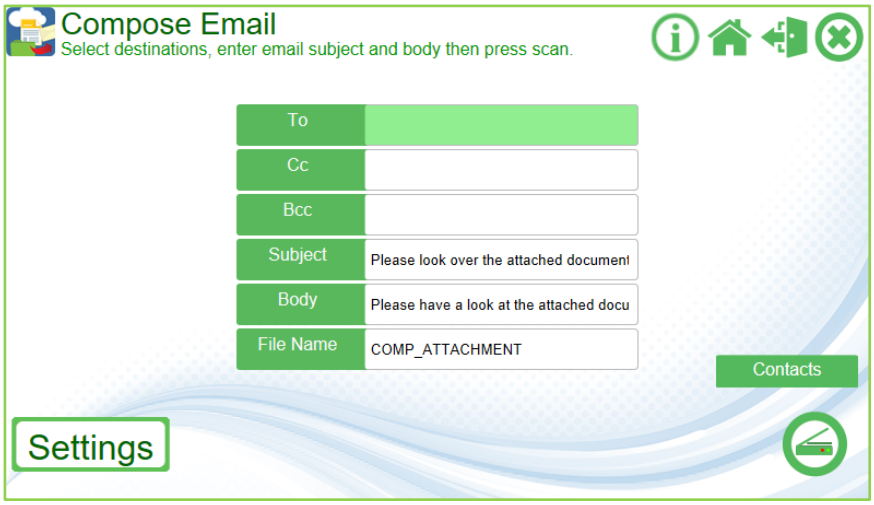
3. Enter number of copies and choose a color section and/or duplex mode. Press the **Next button** to begin printing.

5.6 Exchange/Exchange Online

5.6.1 Scan to

1. After logging in to the Exchange service, users can fill out the fields individually. The Subject, Body, and File Name fields can have their default values set in the service's configuration.



The To, Cc, and Bcc fields can be populated either by manually typing the address with the MFP's keyboard input. When manually entering multiple addresses, **it is essential to separate multiple addresses with a semicolon (;)**.

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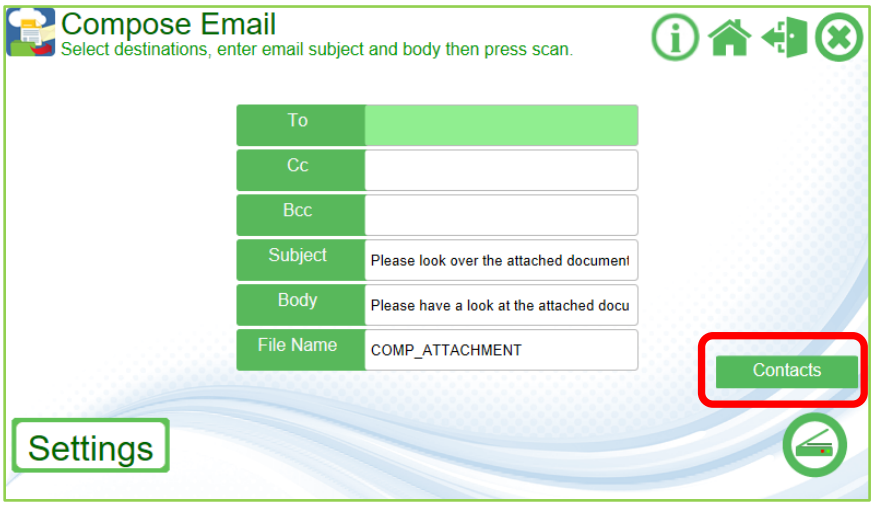
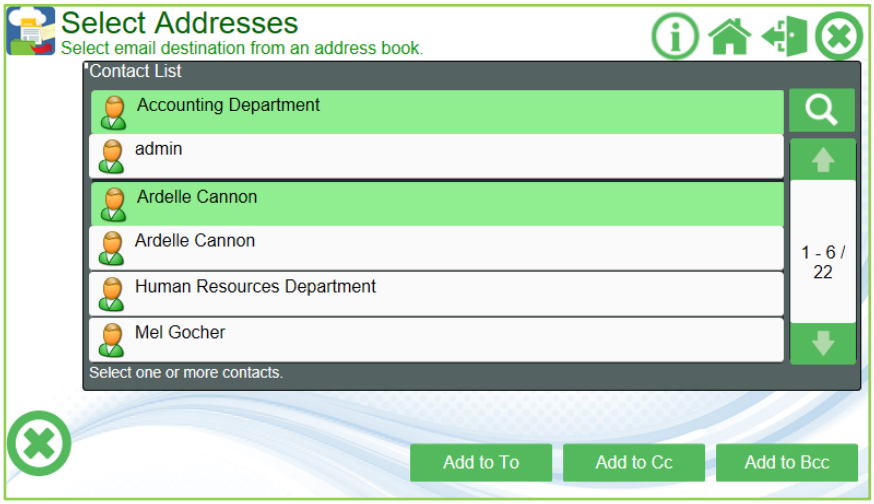
The user may also view their Exchange phonebook by pressing the **Contacts button** located to the right of the fields list.



Users can apply addresses to the TO, CC, or BCC field by first selecting one or more address then pressing the associated TO, CC, or BCC buttons at the bottom of the list.



2. Users can use the **Settings button** located on the lower left-hand corner of the panel to change any of the scan settings. Once all fields are filled out press the **Scan button** to begin the scan.

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3. The panel will display an animation once the scan begins. When the scan processes successfully the panel will display and “Finished” page indicating a successful job. The scanned image and email information is passed to the Exchange server for any further processing and email delivery.

4. Users can then select the **Finish button** to return to a blank email template or use the **Reuse Previous button** to reuse all addresses entered in the TO, CC, and/or BCC fields.

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6. Support

For KYOCERA Microsoft connector Support:
Contact your authorized Kyocera or Copystar Dealer.

For a listing of authorized Kyocera Dealers:
https://usa.kyoceradocumentsolutions.com/en/where-to-buy.html

For a listing of authorized Copystar Dealers:
https://copystar.com/en/where-to-buy.html

or

Contact KYOCERA Technical Support

Phone
Monday - Friday 9 am - 6 pm EST
1-800-255-6482

Web
https://usa.kyoceradocumentsolutions.com/en/about-us/contact-us.html

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