PSIGEN software **inc.**
the **science** of document capture

PSI**capture**

PSIcapture Email Connector

Quick Start Guide

Getting Started

Welcome to PSIcapture Email Connector!

This Quick Start Guide is designed to help you through the process of configuring a basic email capture within PSIcapture. Every network environment has many variables, such as security policies and permissions, which can be configured in a variety of ways. This guide will provide the configuration steps for a typical environment. For additional information on features not covered in this guide, please refer to the PSIGEN wiki at help.psigen.com.

This guide covers the configuration of PSIcapture Email Connector, which is a feature of PSIcapture 7.x and above. This guide assumes you have a working knowledge of PSIcapture and have a functional installation of PSIcapture 7.6.x or above.
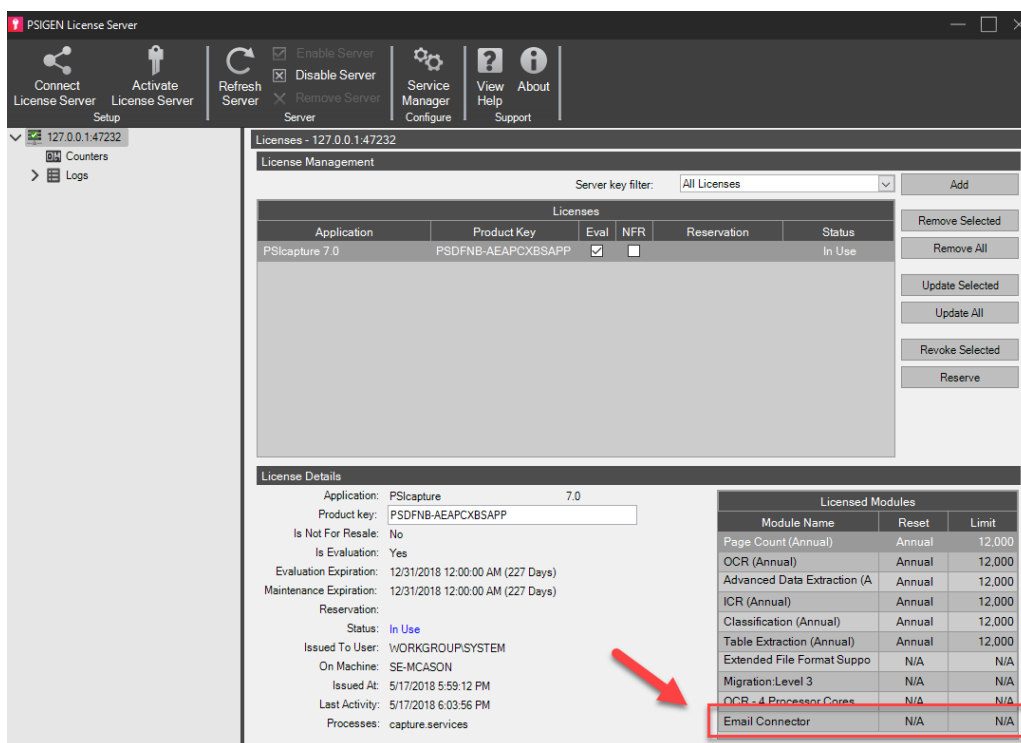
Requirements:

- Ensure your computer meets the minimum requirements
- Functional installation of PSIcapture 7.6.x or above
- Licensed module of PSIcapture Email Connector
- Email server that supports the IMAP protocol
- Active email account credentials
- (Optional) Email client, such as Microsoft Outlook

Note: PSIcapture does not have to be installed on the same system as the email client for this module to function.

Prerequisites – Ensure Email Connector Module is Licensed

PSIcapture Email Connector is a licensed module and must be activated through typical licensing channels. Please contact your reseller to acquire your license. Once your license key is updated, you will notice that the module now appears in the license details under licensed modules.

1. To view your license from PSIcapture, navigate to the Utilities tab in your PSIcapture ribbon, then select License Server. Highlight your license in the Licenses panel. In License Detail, under Licensed Modules, the Email Connector module will appear if you are licensed correctly. (Please note you may have to scroll down within the Licensed Modules panel in order to see the module).
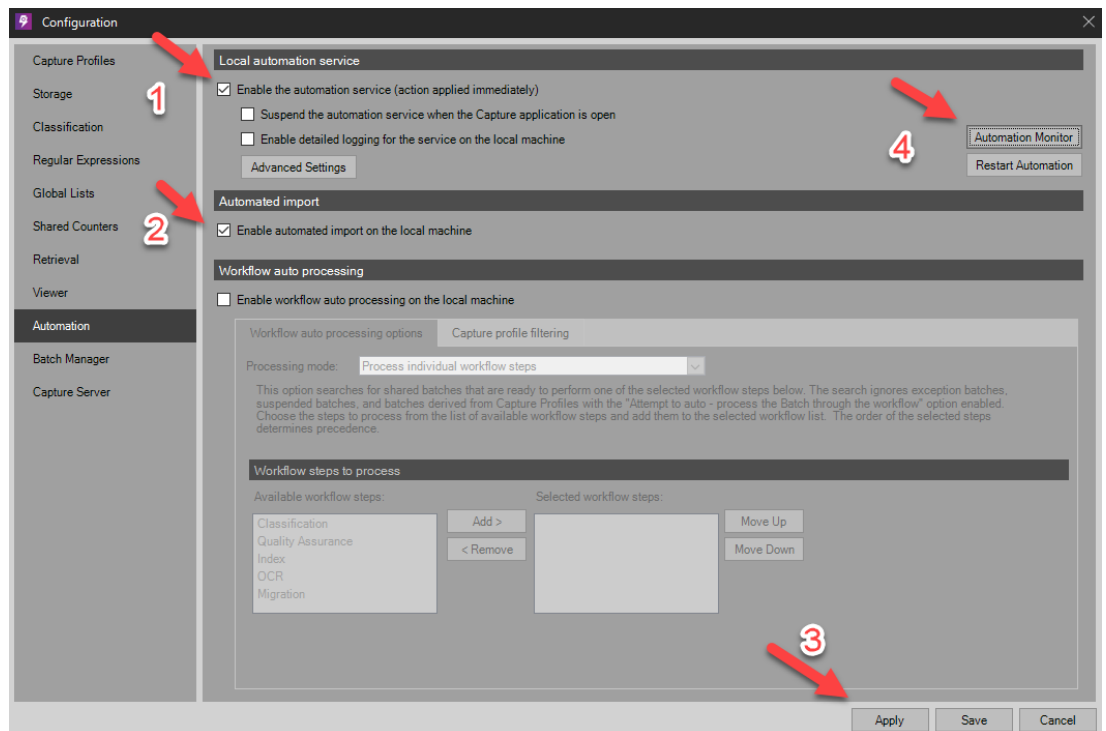
Prerequisites – Turning on Automation

In order to use automation in a Capture Profile it needs to be enabled and configured in Configuration.

1. To enable and configure automation, select Configuration in the Settings tab in PSIcapture. From here you will want to check the box to "Enable the automation service" (1) as well as the checkbox to "Enable automated import on the local machine" (2). Click Apply (3).

2. Next, Click Automation Monitor (4) to verify the worker status

   a. From Automation panel, click the Automation Monitor button. The Automation Monitor will open.

   b. Select Automation Workers (default selection). Here you should see your automation worker process. The status of your worker process should read "Available" if everything is working properly.

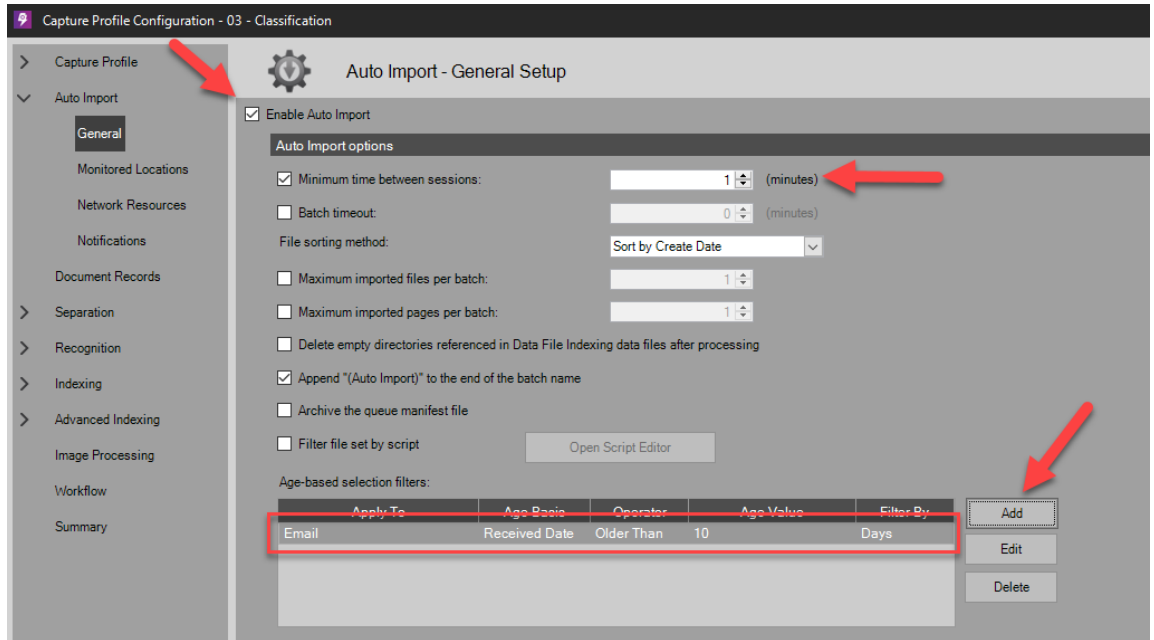   c. Click Close button to exit.

Configuring Your Capture Profile

Configuring Your Auto Import – Monitored Location

Once properly licensed and automation is turned on, you may now begin configuration of the PSIcapture Email Connector.

1. From PSIcapture Configuration, add a new Capture Profile or edit an existing Capture Profile.

   a. When adding a new Capture Profile you will need to assign a name for your new profile, add a description of your choice, and confirm your Storage Location.

2. From within the Capture Profile Configuration, navigate to Auto Import > General. From the Auto Import – General Setup panel, enable Auto Import by selecting the checkbox labeled "Enable Auto Import". You may also configure a few additional options in the Auto Import Options section.

   a. PSIcapture will poll the monitored email mailbox at a certain frequency. To manually set this time, enable the check box labeled, "Minimum time between sessions". Set the frequency to your desired time (in minutes).

i. Tip: You may opt to set session frequency very low during initial testing, and once you are comfortable push this limit up a bit more.

ii. For PSIcapture to process emails, enable the checkbox labeled "Select files based on file age". Set this to a value of "By Days", then set the value to your desired maximum age. 100 days is the maximum value."
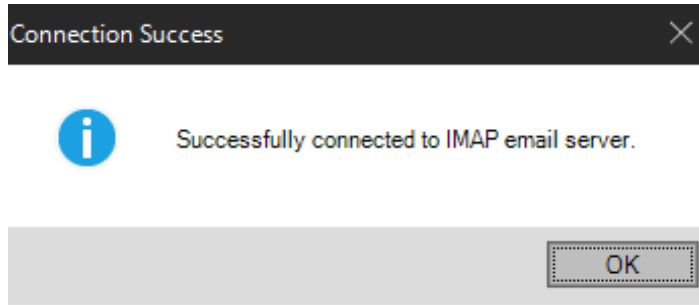
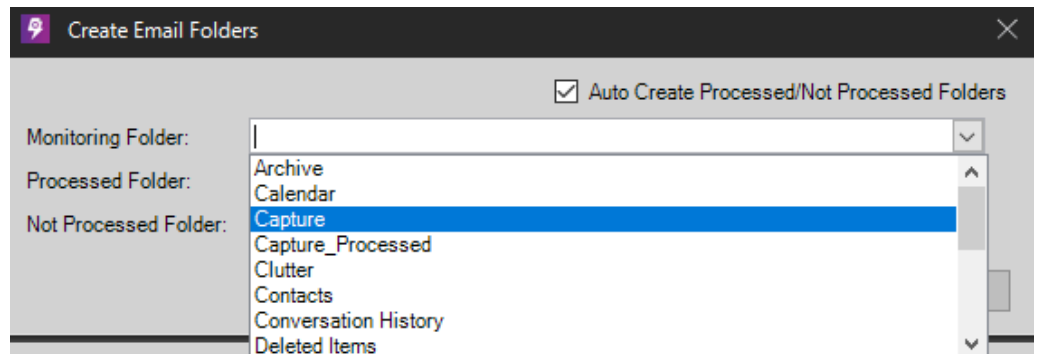1. By default the "Age basis" value is set to Create Date.

3. From within the Capture Profile Configuration, navigate to Auto Import > Monitored Locations.

4. Click Add button to present the Add Monitored Location settings screen. Then Select Email radio button.

a. Under Connections Settings section, Fill in your email server's IMAP URL. If you do not have this information, please contact your IT administrator.

b. Fill in your email server's IMAP port number:

    i. For standard IMAP email, use port 143.

    ii. For secure IMAP email, use port 993.

    iii. If your email server uses a custom port, please enter this value instead.

c. If using secure IMAP, please select the check box labeled "This server requires SSL"

d. Authorization options:

    i. Enter the credentials (username and password) of the email mailbox to be monitored.

    ii. Alternately, if you would like to use the Windows credentials of your workstation to authenticate with, select the checkbox labeled "Use Integrated Windows Authentication".
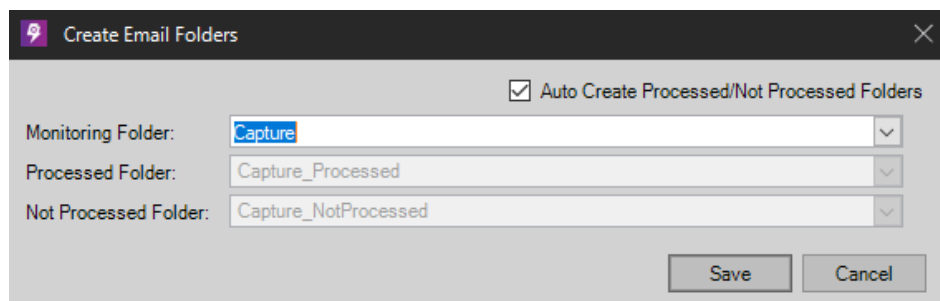
e. Click the Connect button. If successful, you will receive a success notification.

5. Once you have connected successfully, you will now be able to choose which folders to monitor within the monitored email mailbox. To begin, click the Create button located under the Folders section.

6. From the Create Email Folders dialogue, you may select a folder within the monitored email mailbox.

    a. Alternately, you may choose to create a new folder by typing in a new folder name. Doing so will add a new folder to your email mailbox.
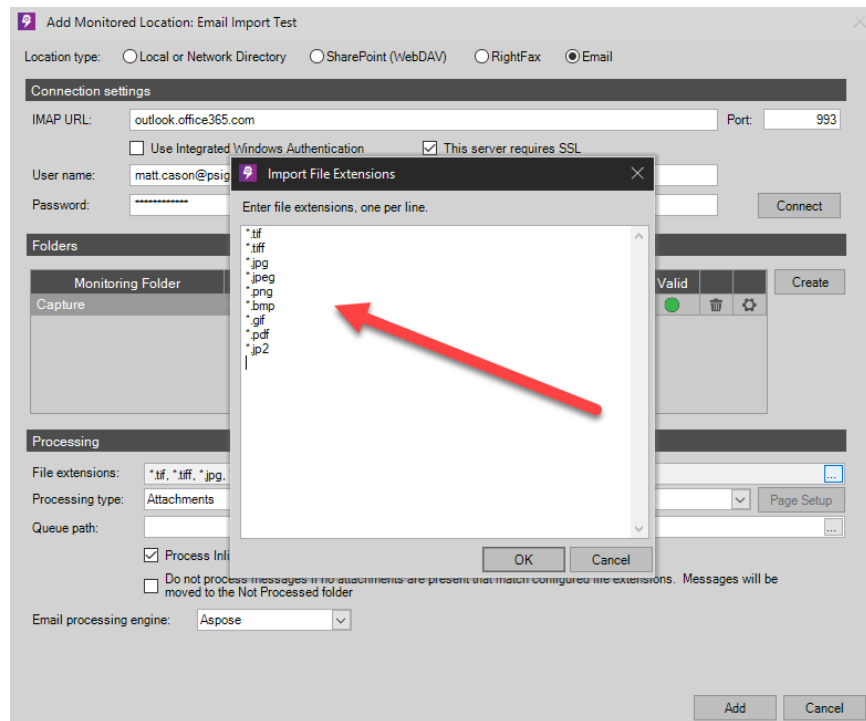

    b. By default, a "processed" and "Not Processed" folder will be created in order to move processed emails and prevent duplication. If you would like to specify a different folder, uncheck the option labeled "Auto Create Processed Folder" and select the folder of your choice.
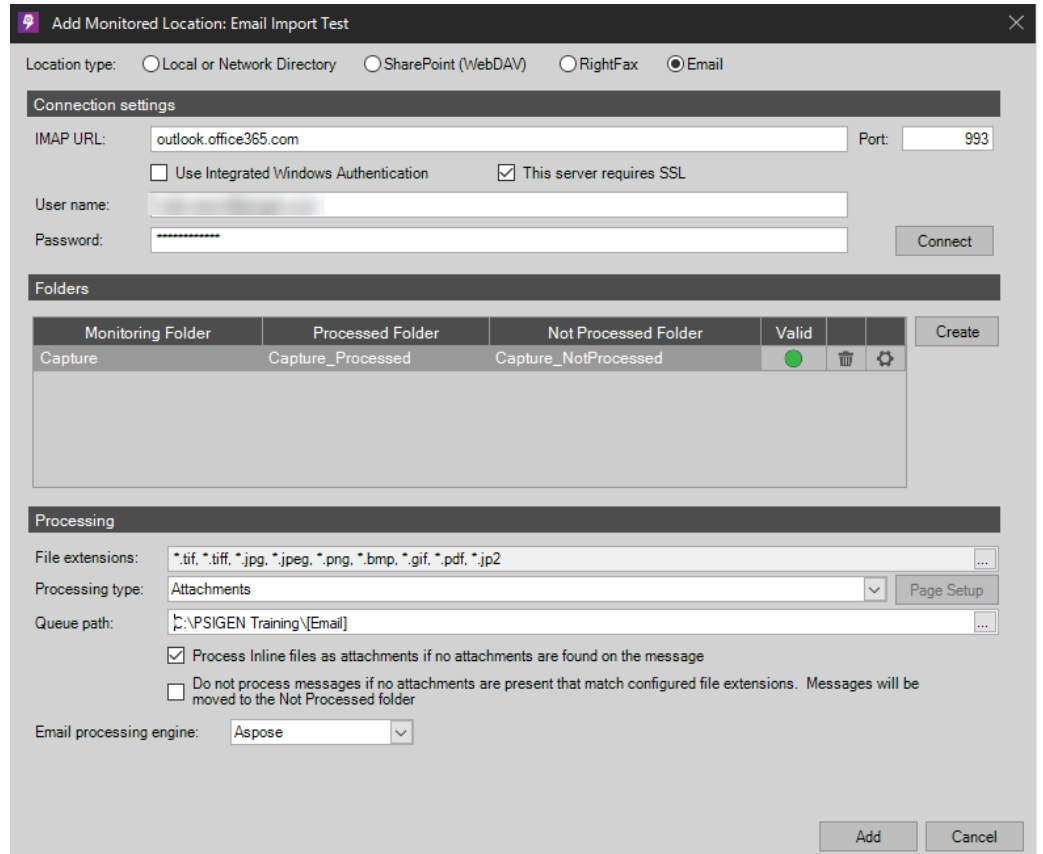

    c. Once complete, click the Save button to close this dialogue.

7. To adjust your processing options, in the Processing section, review the file extensions field. Be sure this includes file extensions that you may receive as attachments.

   a. Common image file extensions such as TIF and PDF are included by default.

   b. You may wish to add common Microsoft Office file extensions, such as DOCX, XLSX, and PPTX file extensions.

      i. To process non-image files, such as Microsoft Office documents be sure you have the Extended File Format (EFF) module enabled.

   c. Be sure to add one extension per line.

   d. File extensions should be in the format of *.nnnn.

   e. Once complete, click the OK button to save settings.

8. Next, you may select how you would like to process emails. There are three (3) options:

   a. Email(s) (only): This setting will process emails only and disregard any attachments.

   b. Attachment(s) (only): This setting will process email attachments and discard any emails.

   c. Email and Attachments: This setting will process both the email and its attachments.

9. Select the Windows file path that PSIcapture will use to temporarily store and process emails and/or attachments. This path will be the monitored directly by PSIcapture to import the emails and/or attachments.
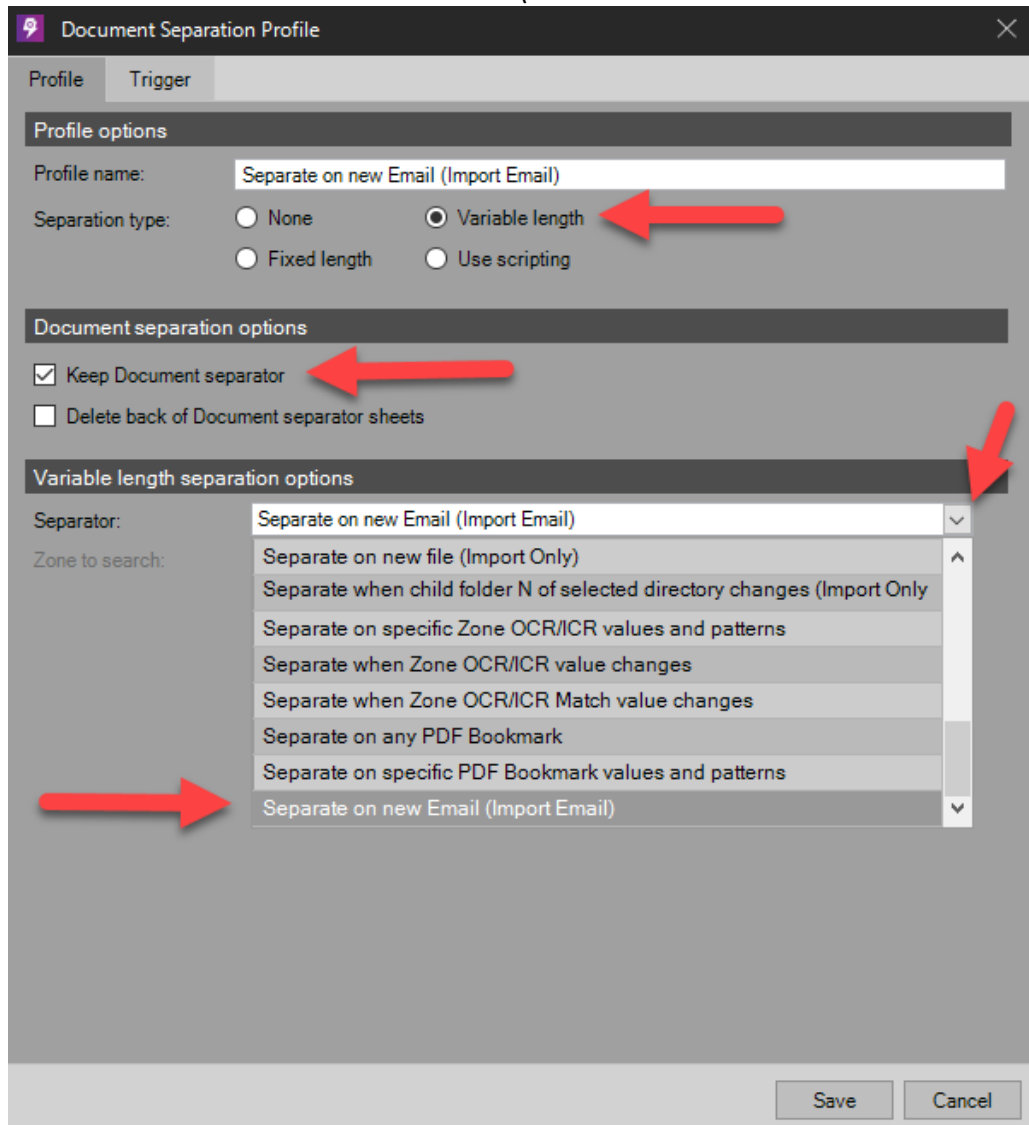
10. Once complete, click the Save button to save your settings and return to the Capture Profile Configuration dialogue.

Configuring Your Document Separation Profile

As with all processing within PSIcapture, how documents are separated (and grouped) is critical to ensuring successful processing.

1. Within the Capture Profile Configuration, navigate to Separation > Document.

2. From the Document Separation panel, choose to add a new separation profile or edit an existing separation profile as desired.

   a. Select the Variable Length radio button for Separation Type.

b. There are two (2) primary separation profiles that are most likely to be used during email capture workflows:

  i. Separate on new Email (Import Emails): This selection allows PSIcapture to automatically sense each individual email and separate it accordingly.

  1. Note that this setting will treat an email and all of its attachments as a single document.

    ii. Separate on new file (Import Only): This selection instructs PSIcapture to separate emails from their respective attachments.

        1. Note that emails and their respective attachments will be grouped under a single folder. So each email will be treated as a separate folder.

c. Once complete, click the Save button.

Configuring Your Document Indexes

Document Indexes are important to ensure meta-data (information about the document) is transferred and applied correctly during migration and storage. By default, PSIcapture Email Connector automatically provides access to key index values of the email to include:

- Email To
- Email From
- Email Cc
- Email Bcc
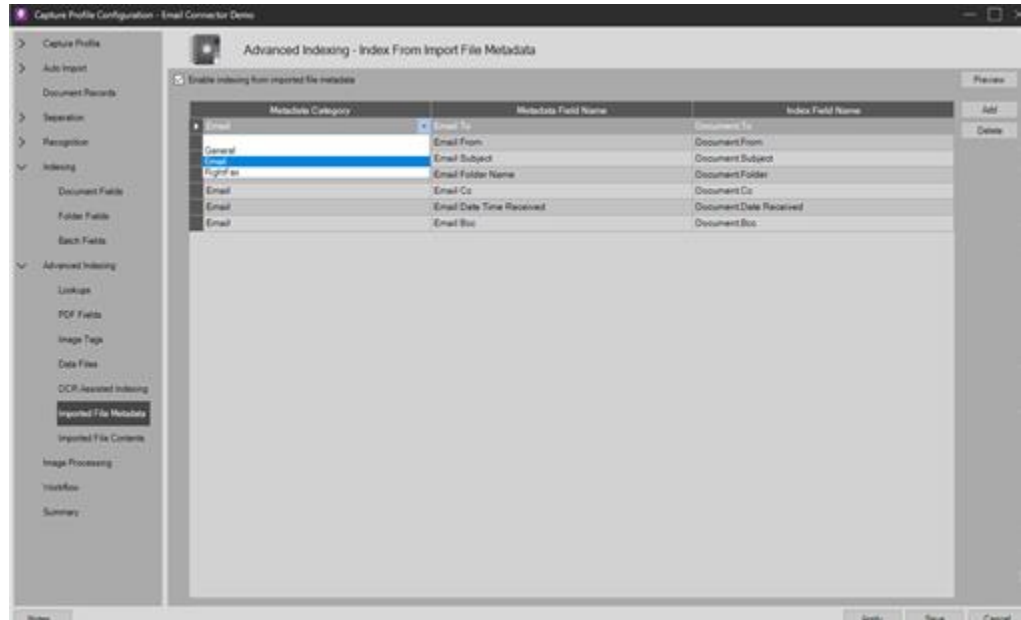- Email Subject
- Email Date Received
- Email Folder

This allows you to automatically map these values to document indexes. To do so:

1. Within the Capture Profile Configuration, navigate to Indexing > Document Fields.
2. From the Document Index Fields tab, add the desired number of index fields and name them accordingly.
   a. It is usually best to keep things synchronized (e.g., name the document index field for email "To:" value "To")
   b. No additional configuration is necessary, unless you wish to add other fields that may be needed to capture OCR data or other system generated information.

3. In order to map the email meta-data through to your document index fields, navigate to Advanced Indexing > Imported File Metadata.
4. From the Advanced Indexing – Imported File Metadata tab, check "Enable indexing from imported file metadata"
5. Next, create the desired mappings (one for each document index field):
   a. Click Add button.

b. In the Metadata Category column select Email from the pull-down list.
c. In the Metadata Field Name select the email value you would like to map.
d. In the Index Field Name select the corresponding document index field to map.
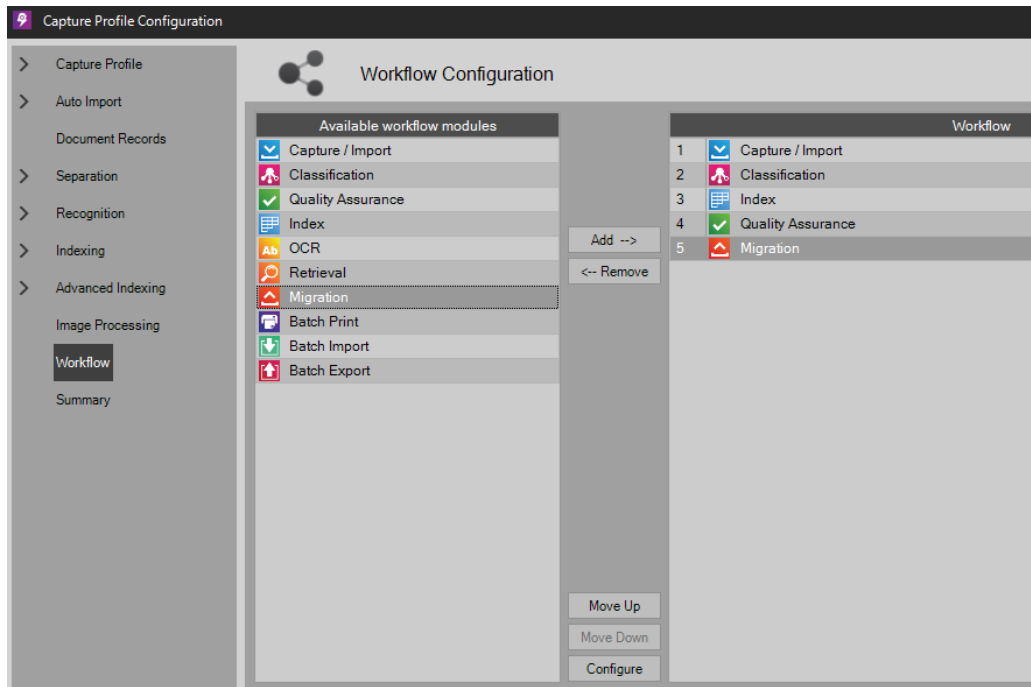
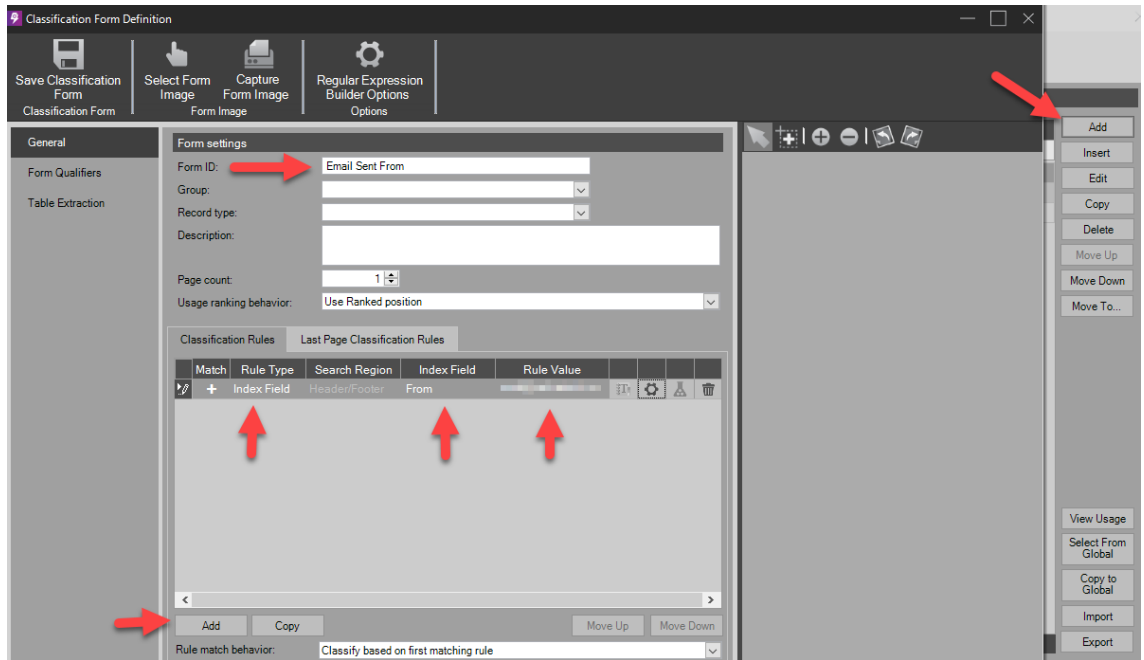

Configuring Your Classification Profile

Classification Profiles are helpful in identifying different types of documents (forms) and connecting that with the way in which you want to process these documents. For instance, you may want to process an email based on a unique word or phrase that always appears in the subject line, or you may want to process an email based on who it's from.

A new feature in PSIcapture allows you to apply document index values during classification. Since unique meta-data is gathered as documents are captured, you no longer have to solely rely on OCR to help classify documents.

1. Within the Capture Profile Configuration window, navigate to Workflow, and add the needed modules. In this case, we will add five (5) modules:
   a. Capture/Import (required)
   b. Classification (required if classifying documents)
   c. Index (required)
   d. Quality Assurance (optional)
   e. Migration (required)

2. To configure Classification, double-click the Classification module in Workflow to open the Classification Forms panel.
    a. From the Classification Forms panel, click Add button.
    b. From the Classification Form Definition panel, select the General tab, under Form Settings > Form ID, name your classification form a descriptive name.
    c. From the Classification Rules tab, click the Add button to add a new rule.
    d. Change the Rule Type from the default OCR to Index Field.
    e. Select the Index Field you wish to match.
    f. Enter a rule value, such as:
        i.   Email To is name@domain.com
        ii. Email Subject contains "Re: Invoice"
        iii. Tip: Regular Expressions can be used here to help expand matching options.
        iv. Note: You do not have to use a template image for this feature.
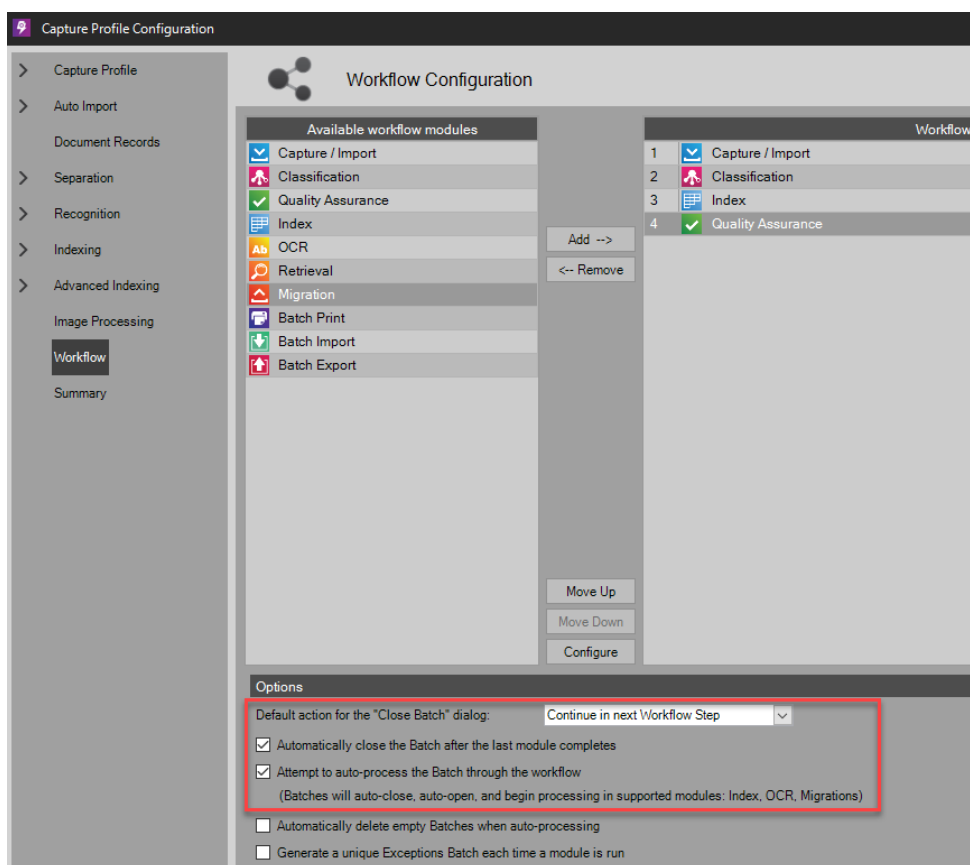
Enabling Workflow Automation

To enable automatic processing of emails, you will need to finalize a few automation settings.

1. From Capture Profile Configuration>Workflow.

2. Under Options section, set the following:

   a. Set Default action for the "Close Batch" dialog to "Continue in next Workflow Step".

   b. Select the checkbox labeled "Automatically close the Batch after the last module completes".

   c. Select the checkbox labeled "Attempt to auto-process the Batch through the workflow".

3. You are now ready to save your profile. Click the Save button.

4. Next, verify that your automation worker is available.

    a. From Automation panel, click the Automation Monitor button. The Automation Monitor will open.

    b. Select Automation Workers (default selection). Here you should see your automation worker process. The status of your worker process should read "Available" if everything is working properly.

    c. Click Close button to exit.

CONGRATULATIONS!!
You've just configured a Capture Profile to Auto Import using Email Capture.