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

PSI**capture**
Fusion

Connecting PSIcapture and PSIcapture Fusion

Quick Start Guide

Sales@PSIGEN.com • 949.916.7700 • www.PSIGEN.com

Getting Started

Welcome to PSIcapture Fusion!

This Quick Start Guide is designed to help you through the process of sending images between PSIcapture and PSIcapture Fusion. For additional information on features not covered in this guide please refer to the PSIGEN wiki at help.psigen.com. PSIGEN offers detailed hands on training with the PSIcapture Fusion software as well.

Make sure you have completed **F1 – PSIcapture Fusion Installation Quick Start Guide** and have a fully installed, licensed, and running PSIcapture Fusion environment. This guide assumes you have a working knowledge of PSIcapture as well as an installation to work with.

Requirements:

- Ensure your computer meets the minimum requirements
- Running version 3.2.0.x of PSIcapture Fusion or newer
- Running version 7.5.x of PSIcapture or newer

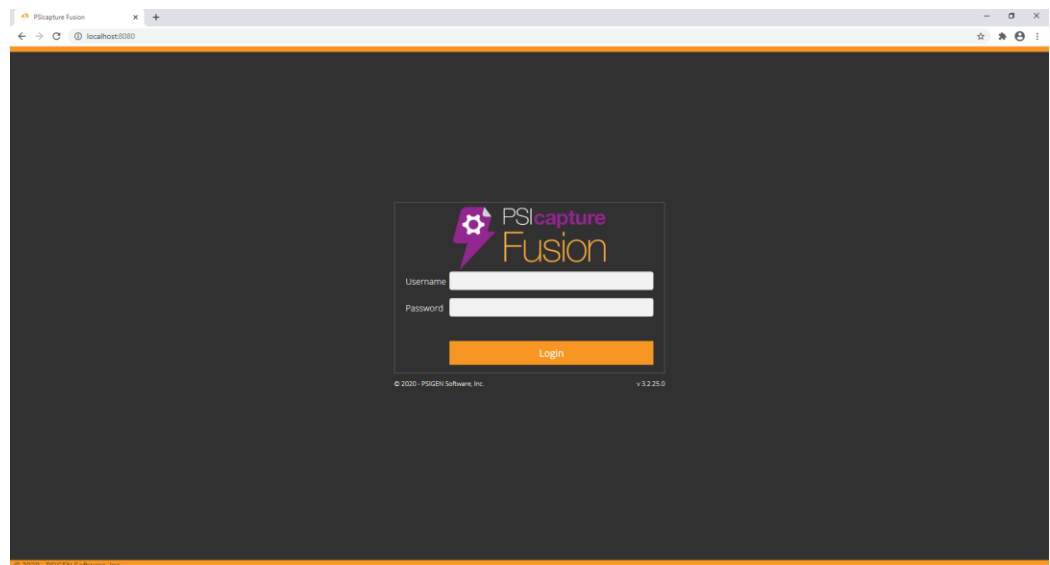*(This area left intentionally blank. Please continue to next page.)*

How do PSIcapture and PSIcapture Fusion work together?

Images will be imported by PSIcapture then exported to PSIcapture Fusion for QA and Data Entry. The final step will be sending the images and data back to PSIcapture for final migrations.
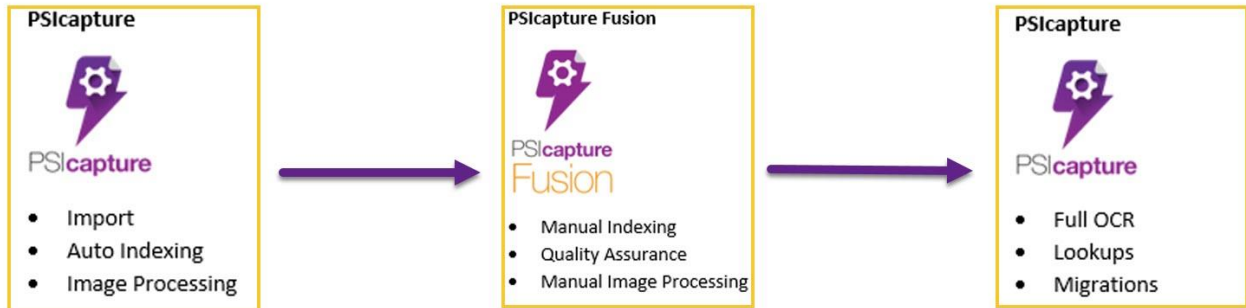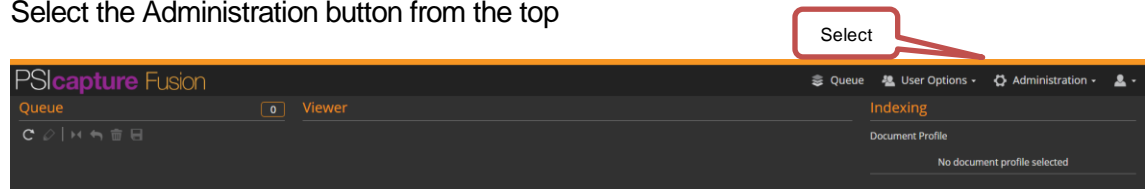

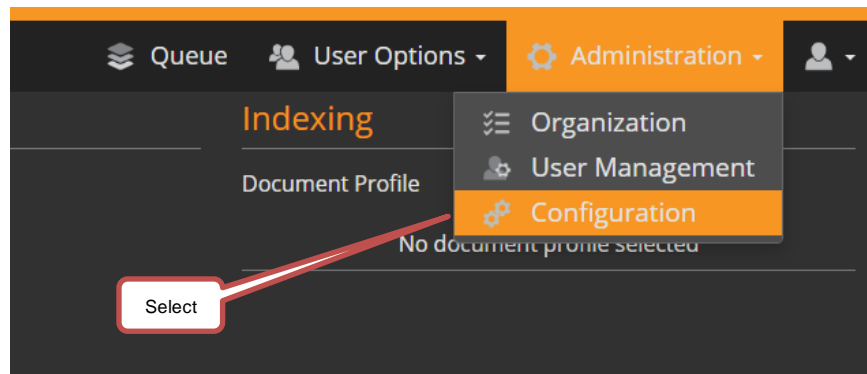## Creating a PSIcapture Fusion Profile to Accept Migrations from PSIcapture

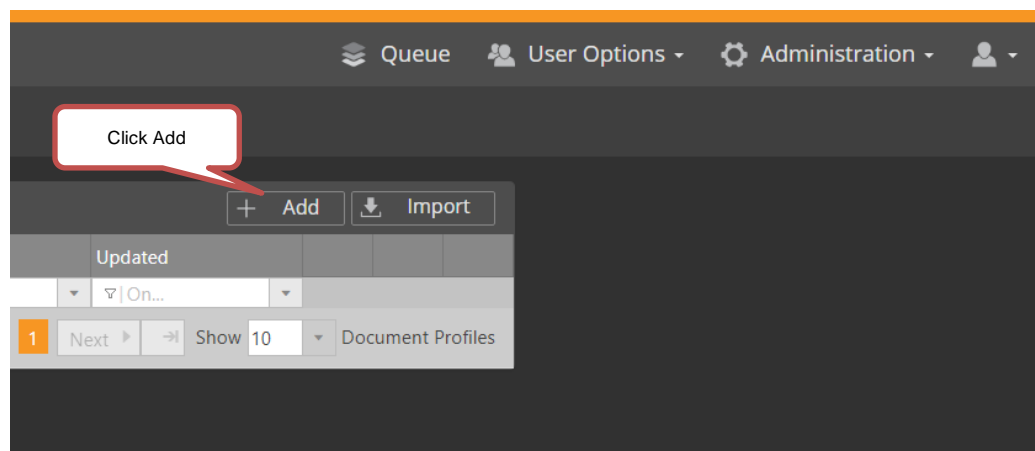Login to PSIcapture Fusion as the Administrator (Password is Admin-01)

Select the Administration button from the top

Select

PSIcapture Fusion

Queue | 0 | Viewer

Indexing

Document Profile

No document profile selected

Select the **Configuration**

Queue | User Options | Administration

Indexing

Document Profile

Organization
User Management
Configuration
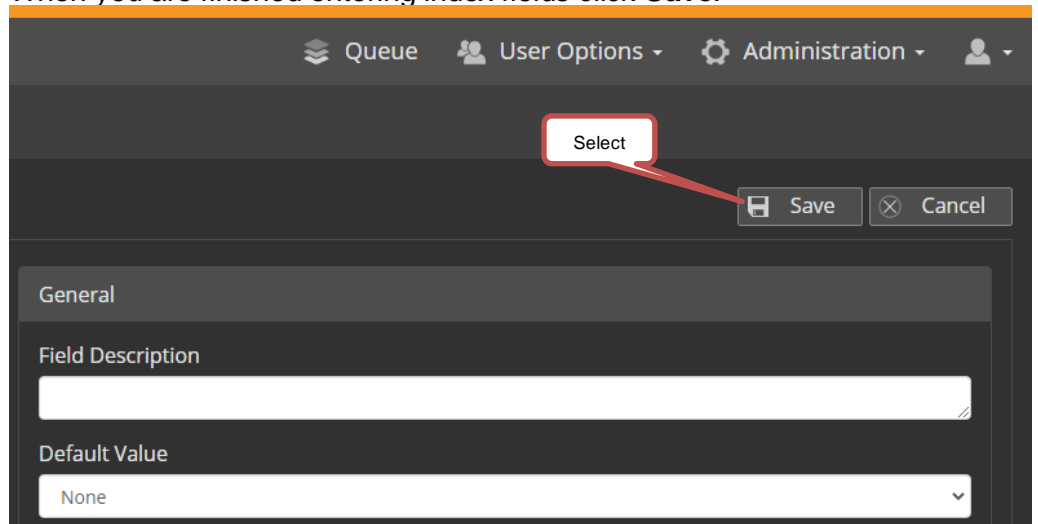
No document profile selected

Select

Then click **Add**

Queue | User Options | Administration

Click Add

+ Add | ⭳ Import

Updated

▽ On...

1 | Next | Show 10 | Document Profiles

Enter a name for the Document Profile. In this example we will use the name Invoice Processing. We will also use Invoice Processing for our Output Folder name

Next select the Fields tab

In the Fields tab, we will create Index Field values that match what was created in the PSIcapture Capture Profile.

Using the **Add** button, create three index fields
1. Invoice Number
2. Invoice Date
3. Invoice Total

When you are finished entering index fields click **Save**.
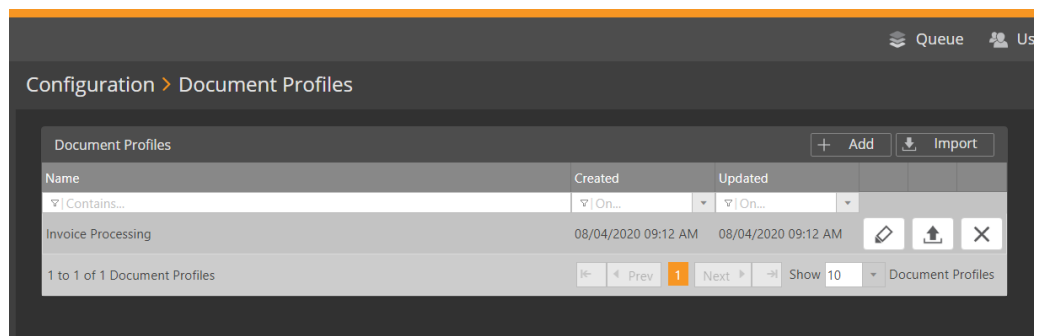
You should now see Invoice Processing listed in the Document Profiles tab.

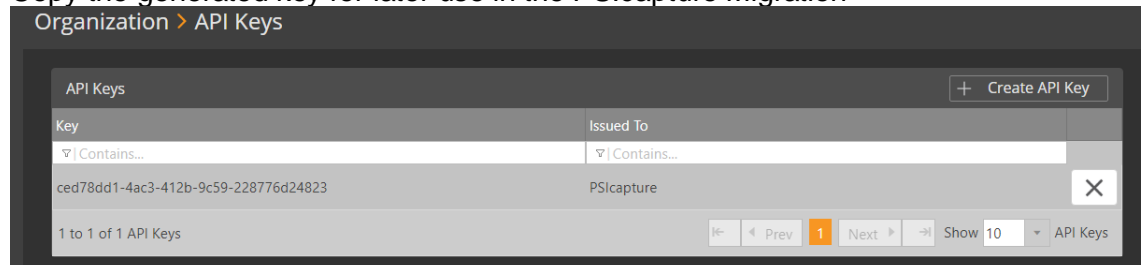Select **Organization** from the left menu, then select **API Keys**
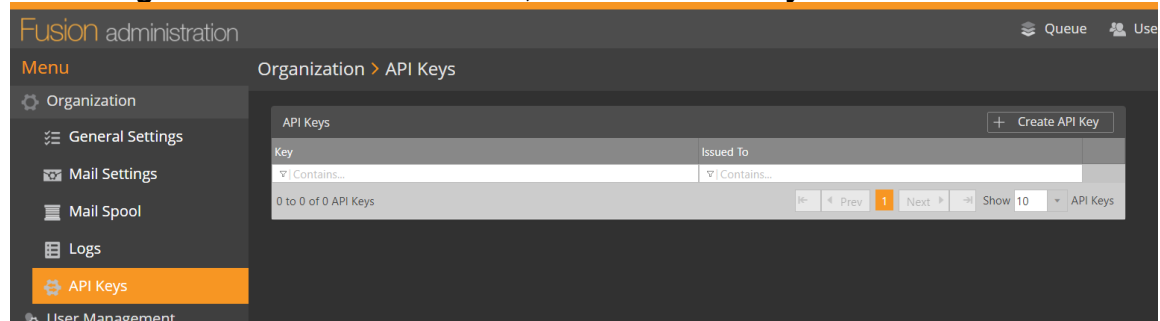
Select Create API Key
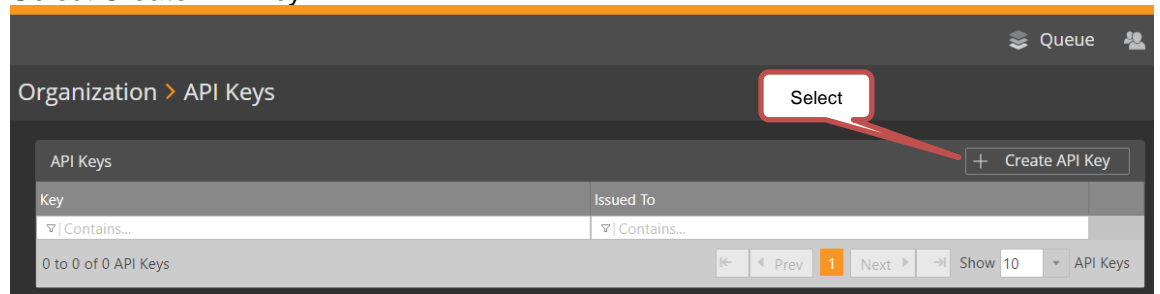
In the **Issued To** box enter PSIcapture and click Save
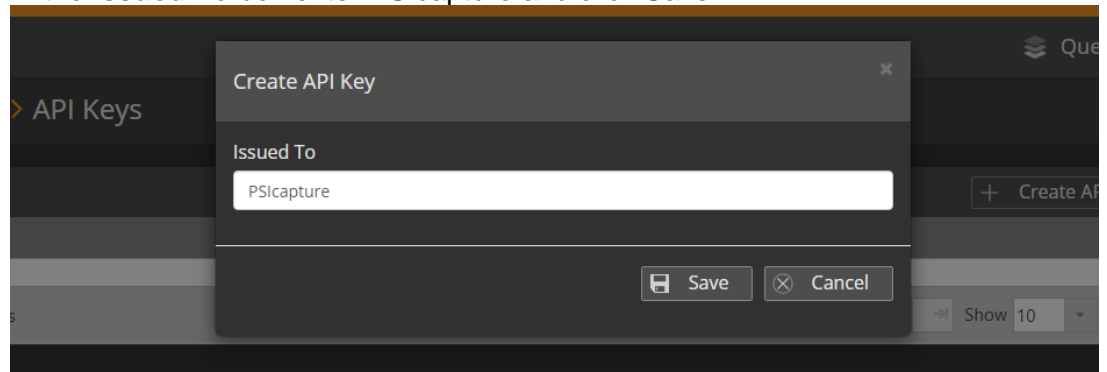

Copy the generated key for later use in the PSIcapture Migration

Click your user icon in upper right and then click Logout.

Creating a Migration from PSIcapture to PSIcapture Fusion

First, we will import the pre-configured PSIcapture Capture Profile accompanying this guide (F2 – PSIcapture to PSIcapture Fusion.xml). This Capture Profile has the standard PSIcapture items of import, separation, and indexing preconfigured in order to focus on adding a PSIcapture Fusion migration.

To Import:

- Open PSIcapture by double clicking on the icon on your desktop
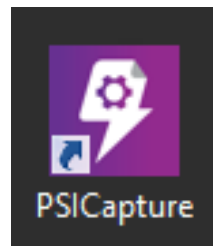
Once PSIcapture is open, select the Configuration icon from the Navigator Menu

Select to open Configuration
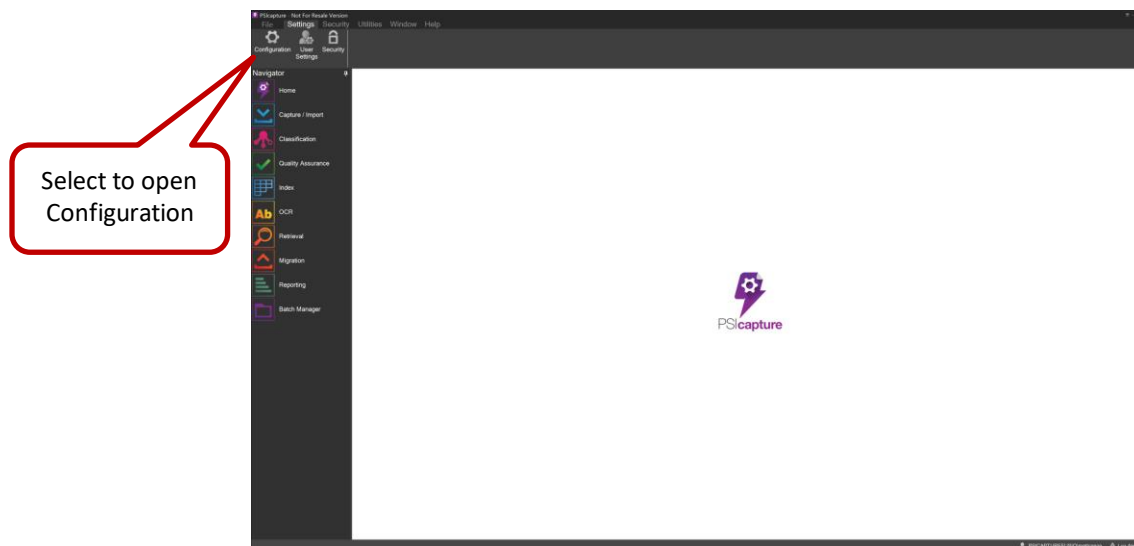
Click on the **Import** button on the right
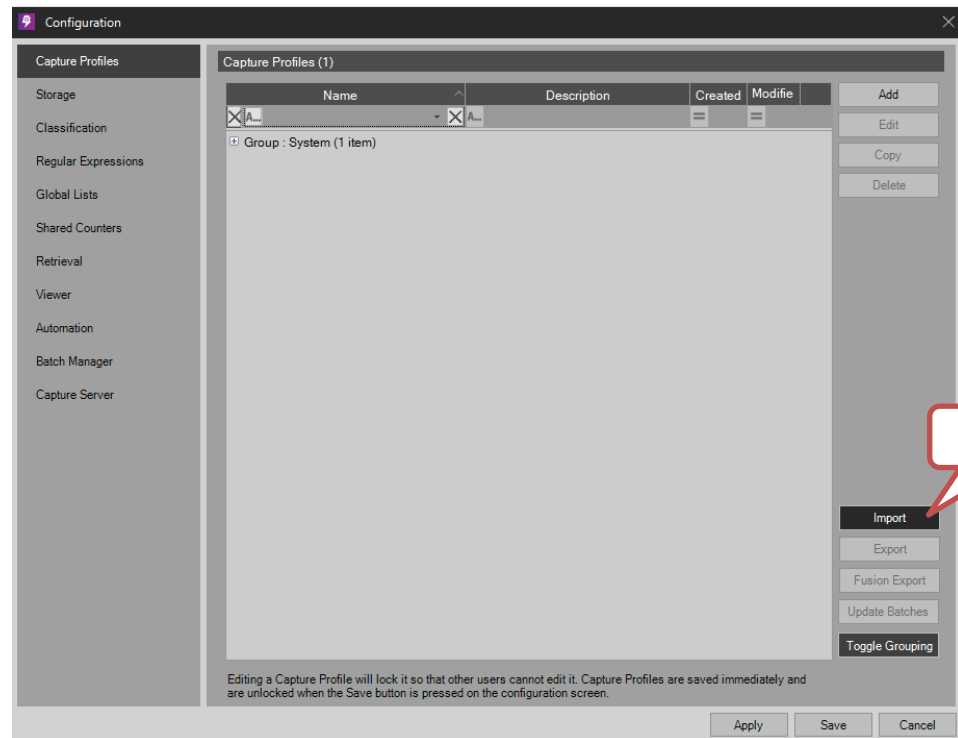
Browse to and select **F2 – PSIcapture to PSIcapture Fusion.xml** and click Open
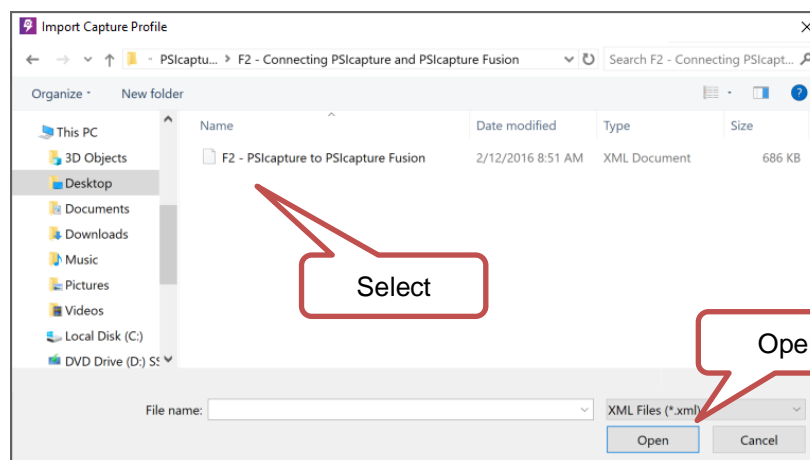
On the General Setup screen, confirm the Batch Storage location
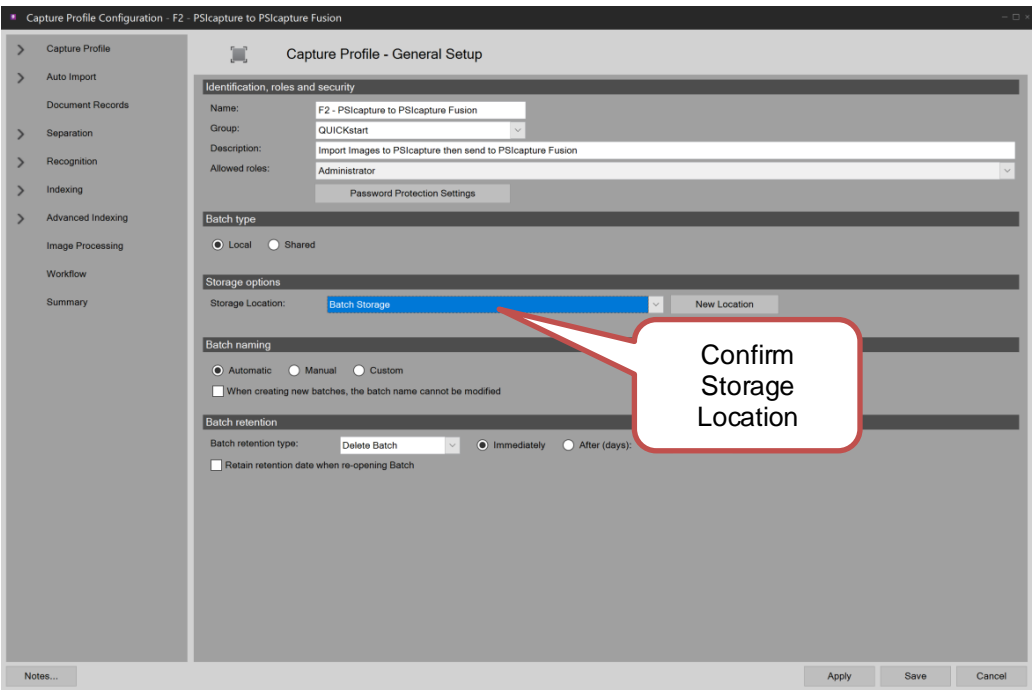
Select Indexing on the left Navigator
   In Indexing you will see 3 pre-configured index fields for specific invoice values.
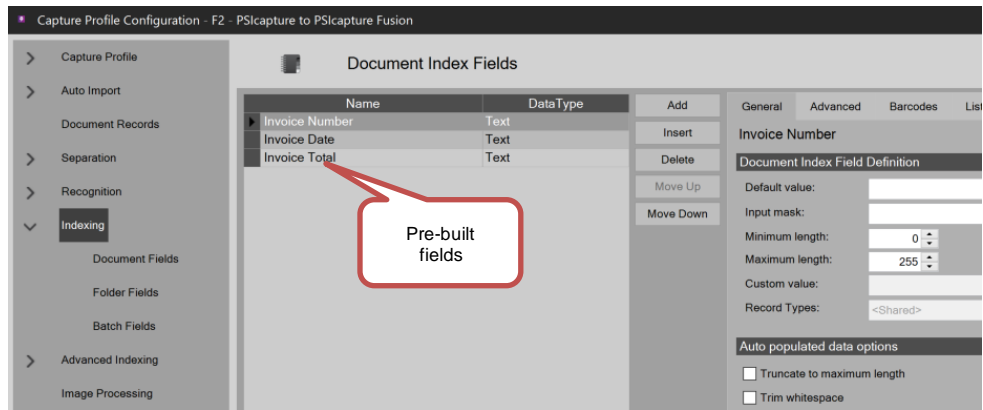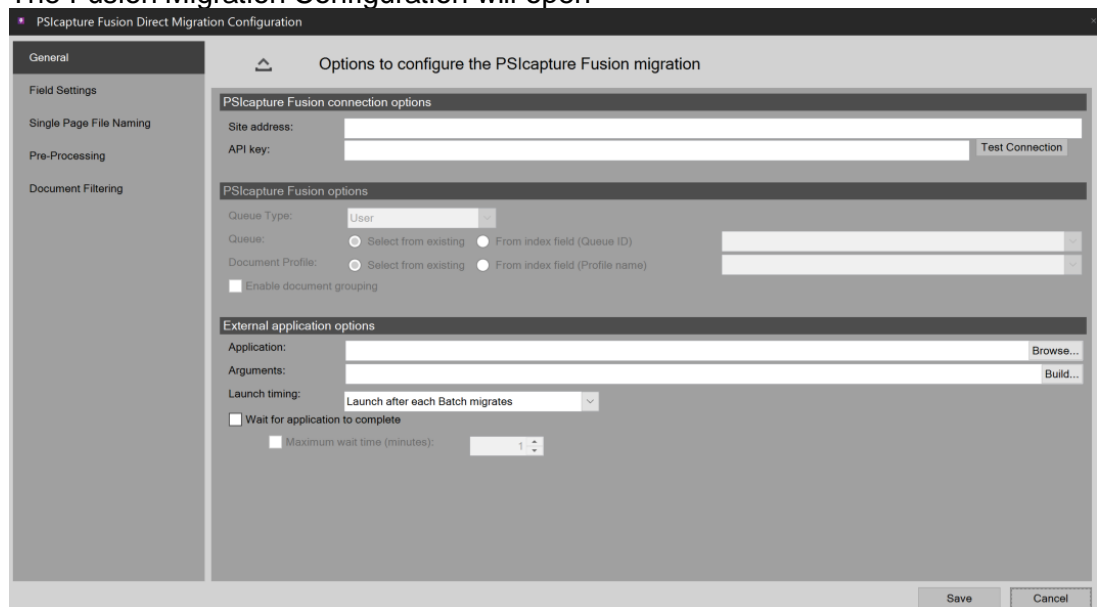

Select **Workflow** from the Navigator

Select **Migration** from the available modules and **Add** to the Workflow
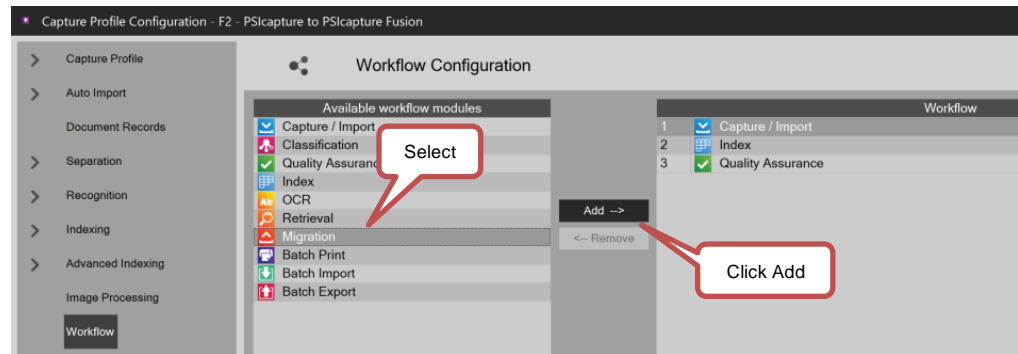
Scroll down the Available Migrations until you find **PSIcapture Fusion Direct**. Select and click **Add**
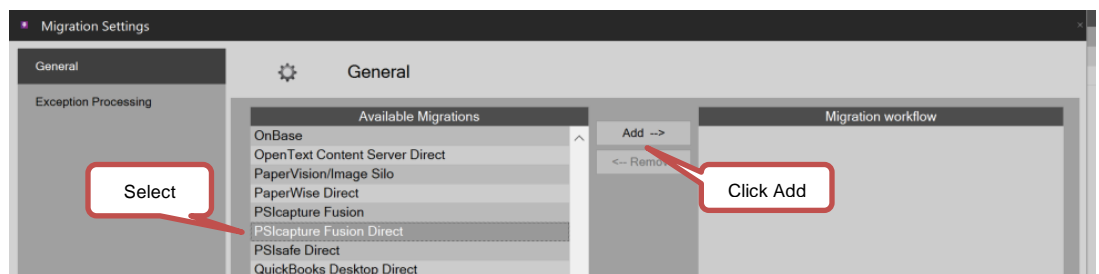
The Fusion Migration Configuration will open

Enter in your site address URL, if PSIcapture Fusion is on the same server you can use localhost, for example http://localhost:8080, then enter in your API key from page 6. Then click **Test Connection**

If settings are correct you should see a Connection Succeeded message

If we wanted to route these documents to a specific user or team, we can specify that in the next section. We set that value based on existing Fusion values of from a populated PSIcapture index field. We will leave it set to migrate to the User Queue 1, System Administrator.

Confirm your index fields are mapped to the correct fields.

Click **Save** on the Migration Configuration

Back in the Migration Settings screen click Save
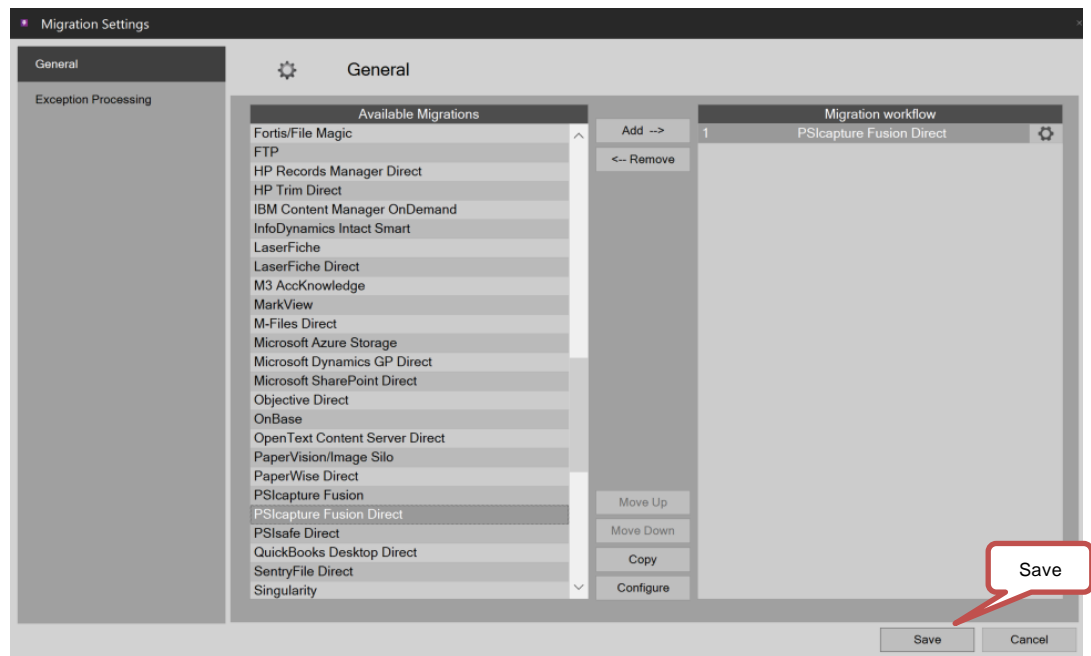
Save Capture Profile and Configuration back to the PSIcapture Home Screen.

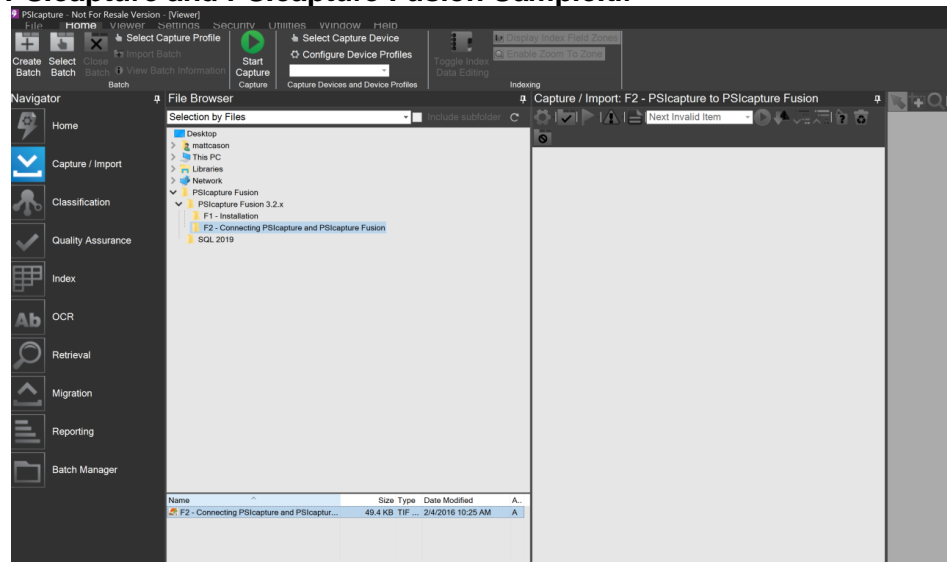## Test Passing the Sample Images from PSIcapture to PSIcapture Fusion
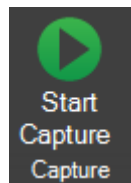
Open PSIcapture and select Capture/Import
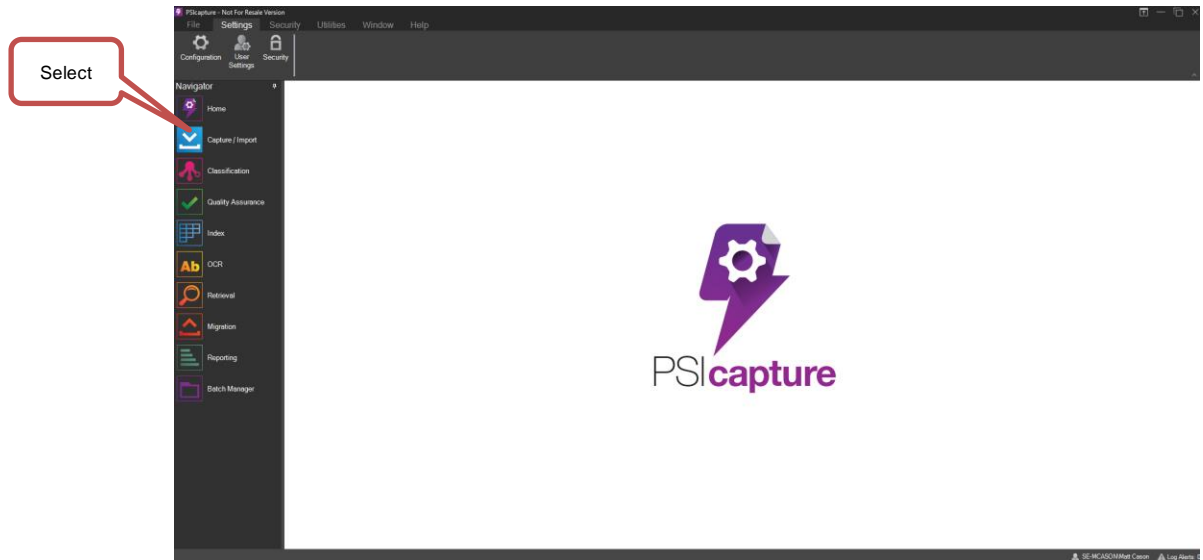
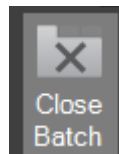Select the Document Type **F2 – PSIcapture to PSIcapture Fusion** and click **OK**
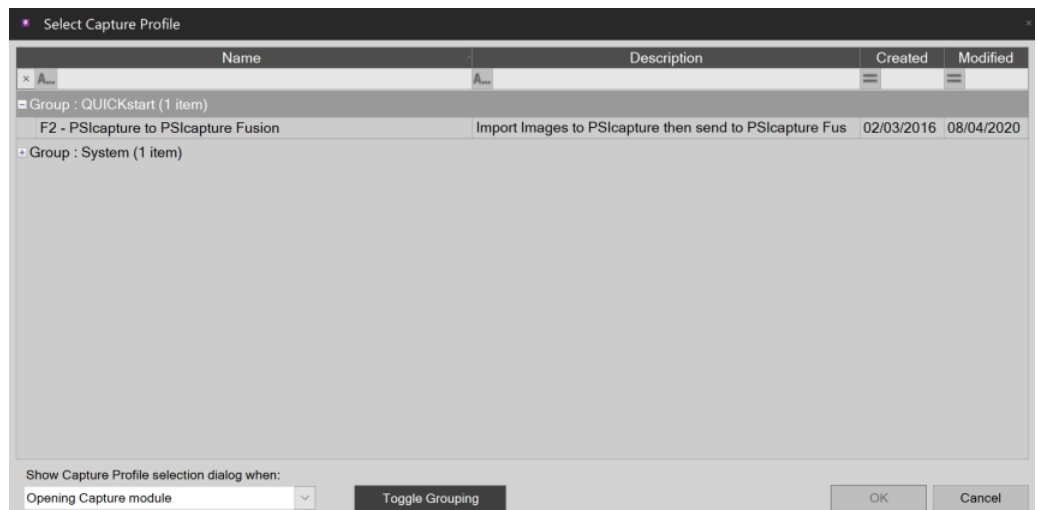
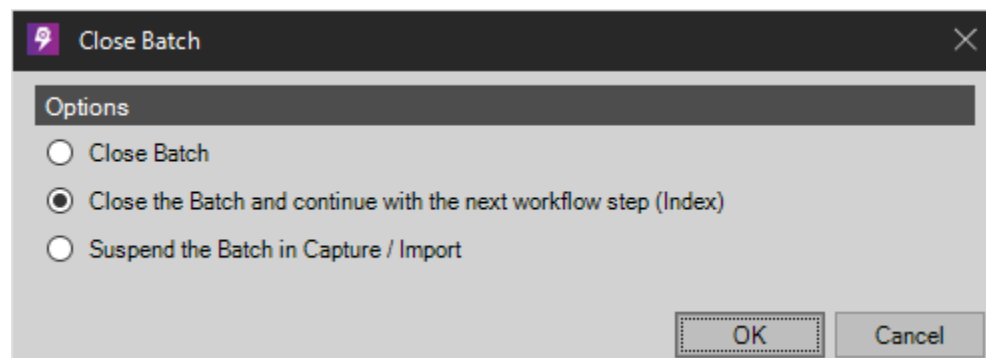Browse to and Select the Sample Image File called **F2 – Connecting PSIcapture and PSIcapture Fusion Sample.tif**
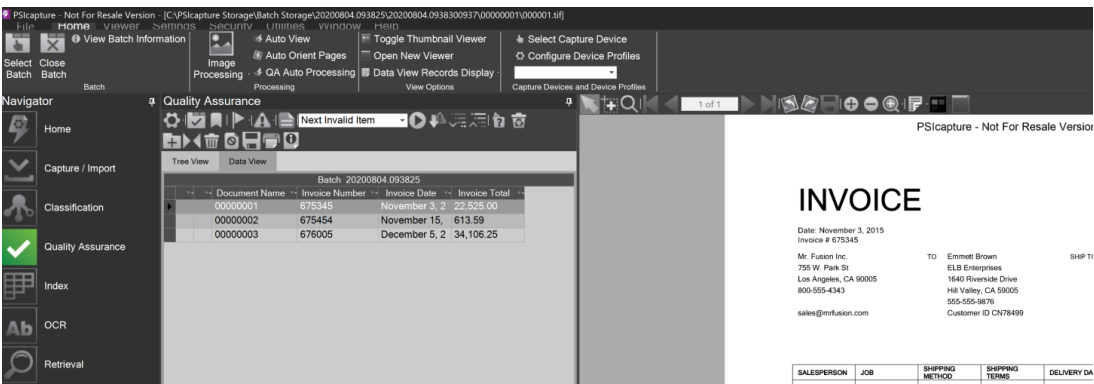

Click on the **Start Capture** button

After the files are imported, click the **Close Batch** button

When the Close Batch dialogue appears click **OK** to continue to Index

The Batch will process through Indexing and display the results in the Quality Assurance view

Click the **Close Batch** button to being Migration:
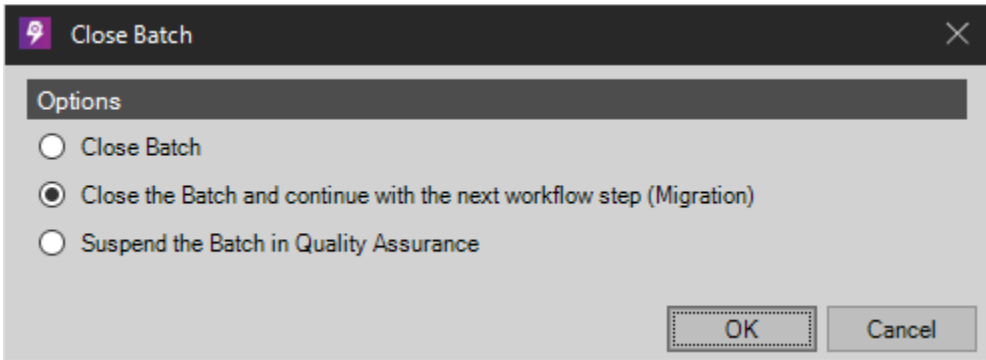
Once the Migration completes you will return to the PSIcapture Home Screen.

Browse to your PSIcapture Fusion site and login as the Administrator (Password: Admin-01)
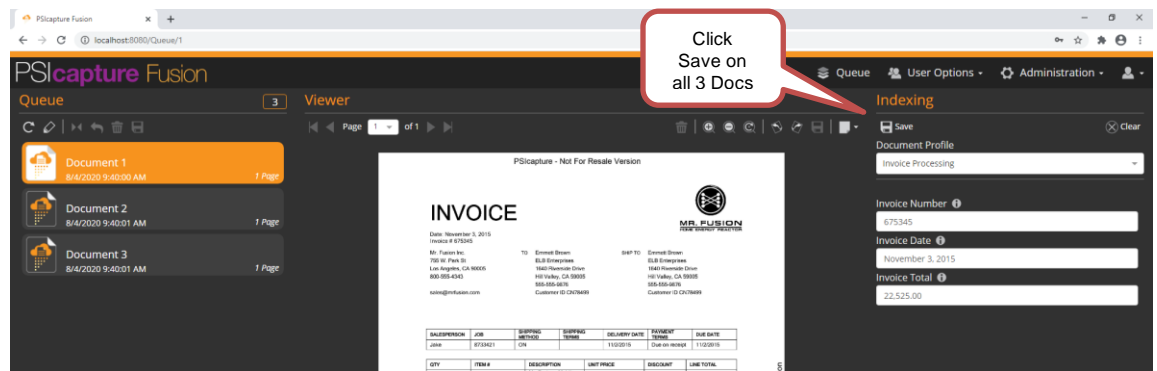
You should now have three Documents available in the Administrator's Queue.

After reviewing the data click the Save button 3 times to process the Queue.

The Batch is now complete and ready for import into PSIcapture.

Creating a PSIcapture Capture Profile to Accept Batches from PSIcapture Fusion

Return to PSIcapture. Select Configuration module and on the Capture Profiles tab, select **Add**.
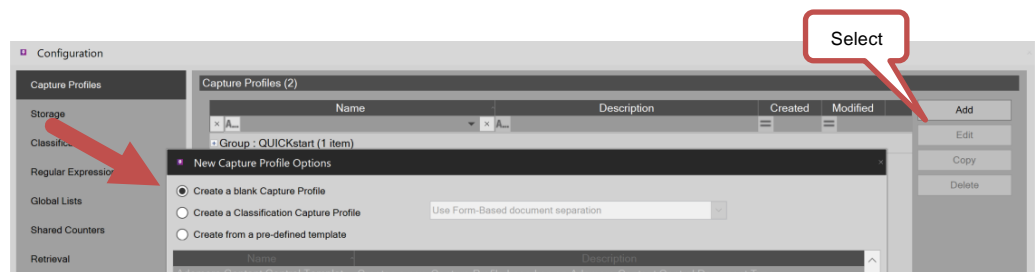
Select Start with blank Document Type and click **Create**.

Enter the following Capture Profile Information and confirm your Batch Storage Location.

Name: F2 – PSIcapture Fusion to PSIcapture
Group: QUICKstart
Description: Import batches from PSIcapture Fusion then pass to Quality Assurance

Select **Indexing** from the navigator

Use the **Add** button to enter the 3 index fields we have captured and reviewed in PSIcapture Fusion

1. Invoice Number
2. Invoice Date
3. Invoice Total

Select **Workflow** from navigator

Select Batch Import from the Available Workflow Modules on the left and add it to the Workflow on the right.
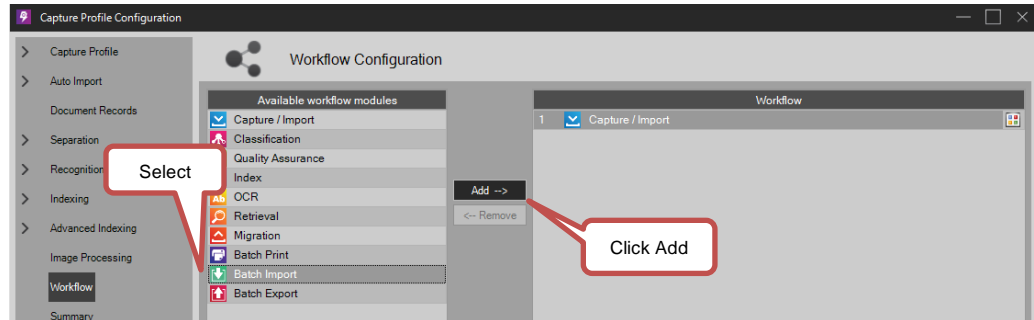
From the dropdown select PSIcapture Fusion Batch Import and click **OK**
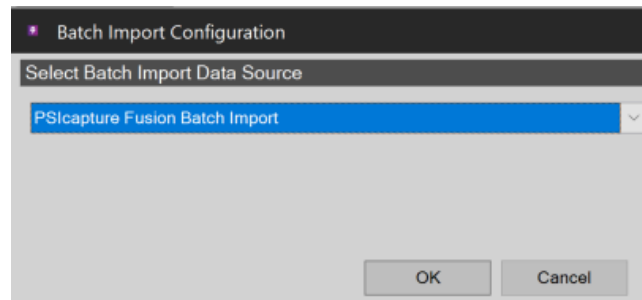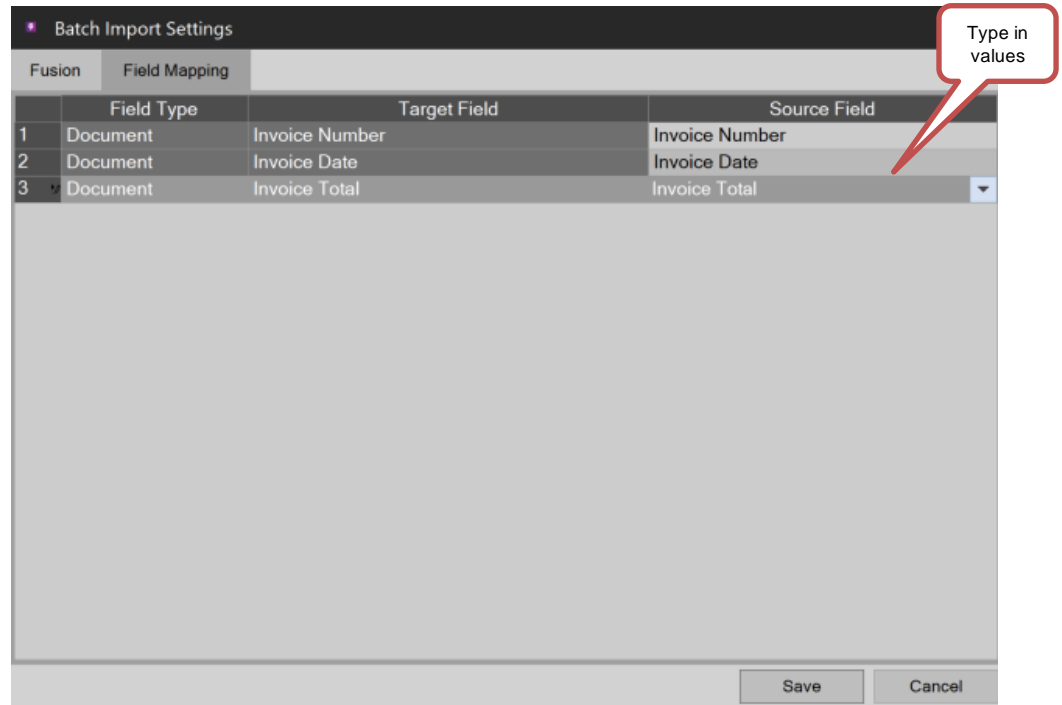
In the Batch Import Settings configuration, navigate to your Program Data\PSIGEN\Fusion\Organizations\<your org ID>\Complete path
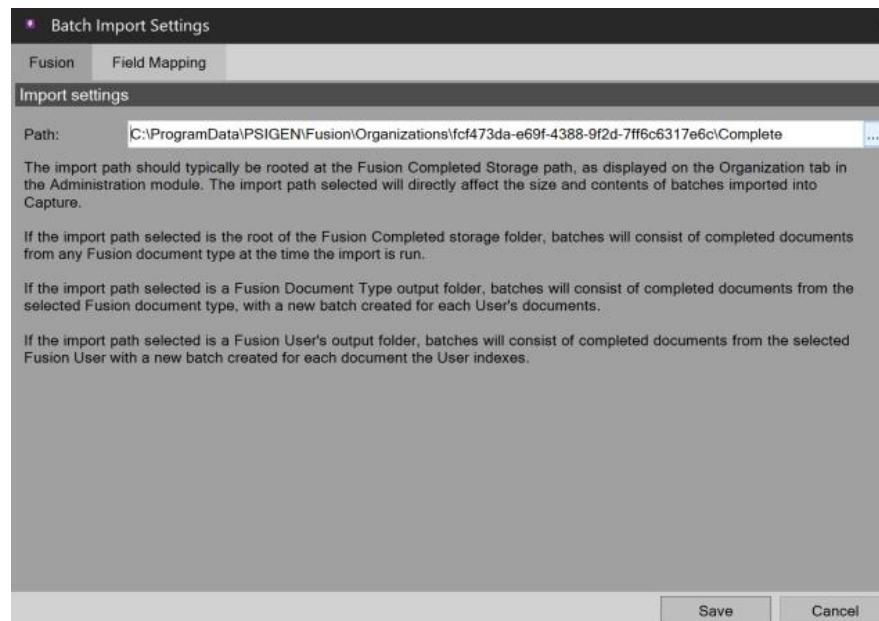
Click on the **Field Mapping** tab

You will manually enter the names of the PSIcapture Fusion index fields in the Source column to map data to the final PSIcapture fields. (These have to match spelling and case to how they are entered in PSIcapture Fusion)

Click **Save**

Next we need to add in a **Quality Assurance** module into our Workflow.
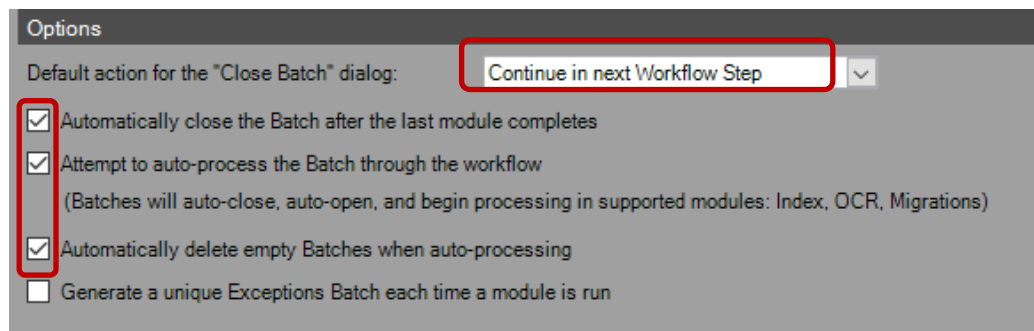
We want to set the Default Batch View to be **Data View** and then click **Save**.

To automate your workflow, you will need to check the first 3 checkboxes under Workflow Options and change the Default Close Batch action to **Continue in next Workflow Step**.
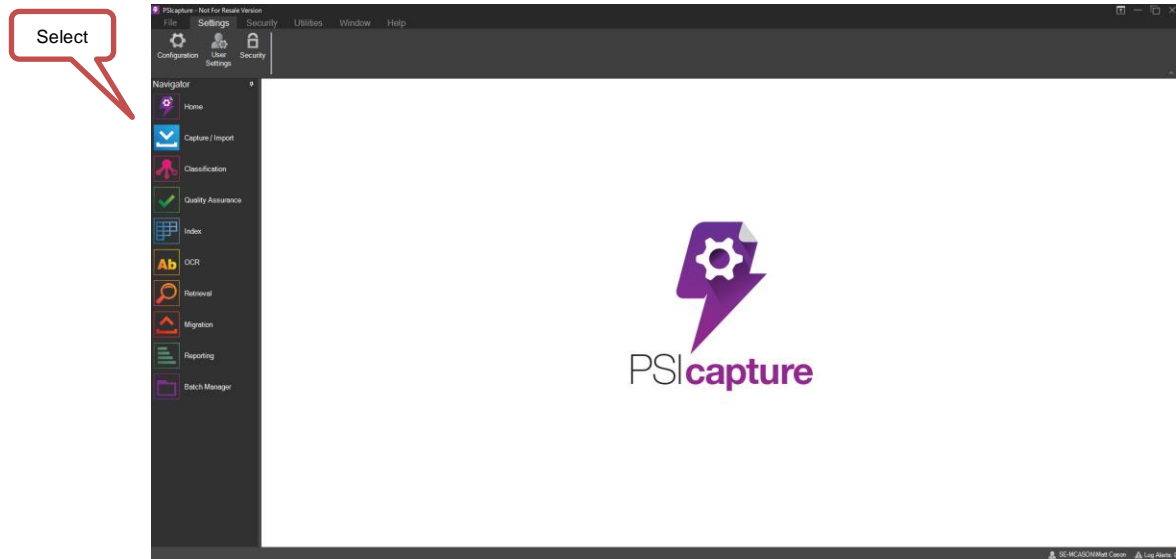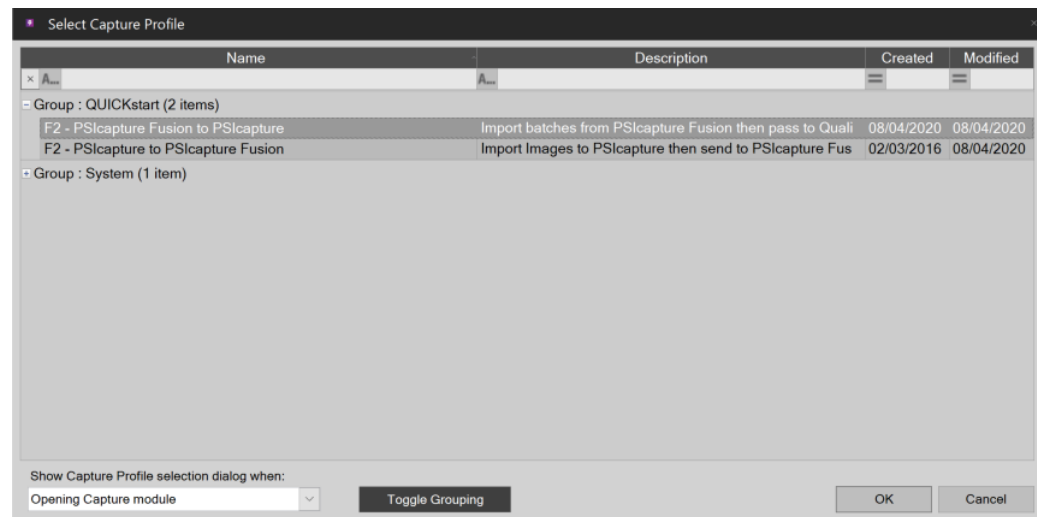

Save back to your home screen.

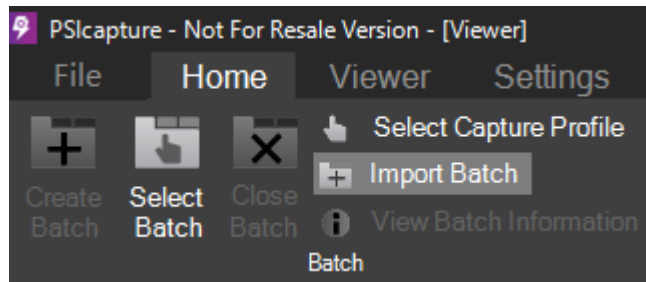Now you will want to test the new configuration by importing the batch saved in the previous section.

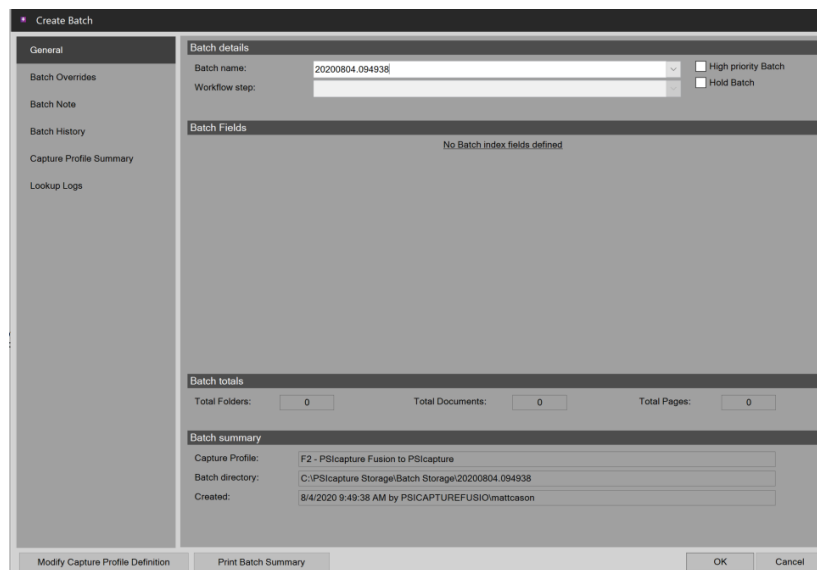From the Home Screen select Capture/Import

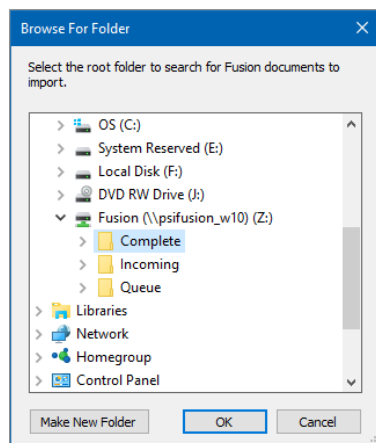Select **F2 – PSIcapture Fusion to PSIcapture** and click **OK**

From the Capture/Import window click on the **Import Batch** Icon.

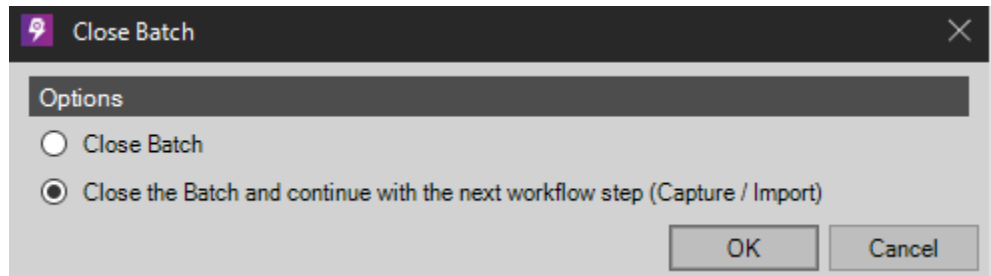Click **OK** on the Create Batch screen.

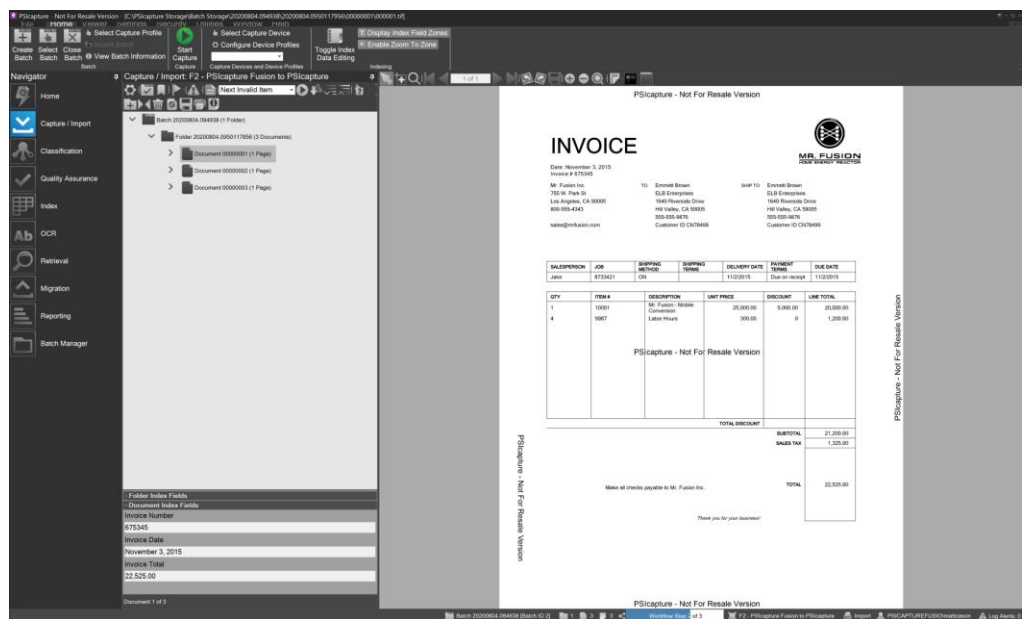From the **Browse For Folder** screen, verify your PSIcapture Fusion **Complete** folder is selected.
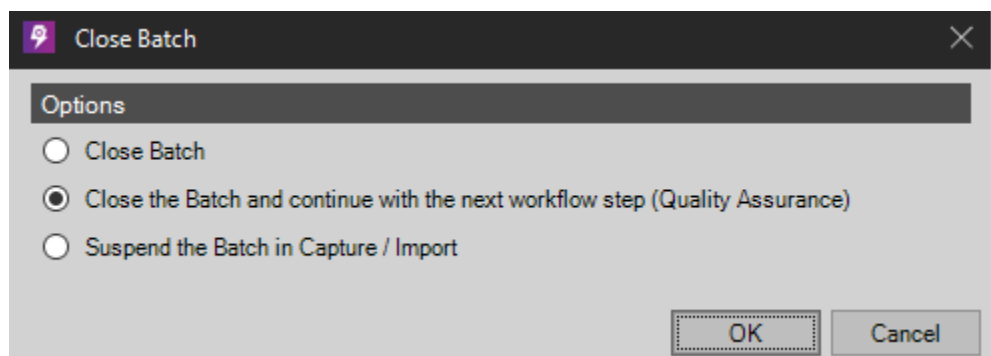

Click **OK**

Click **OK** on the Close Batch message to Import the batch.

The 3 documents saved in PSIcapture Fusion should be imported.

Click **Close Batch** to allow the process to move to your Quality Assurance step.

Verify that the values from PSIcapture Fusion have imported in successfully into PSIcapture

Click on Home to return to the Home Screen.
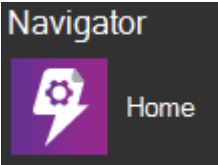
You have now moved a set of images from PSIcapture into PSIcapture Fusion and then back to PSIcapture. Any migration could be added after the Quality Assurance module to move the images into final storage. You could now go back into each profile and enable and configure automation and auto import to reduce human interaction.

CONGRATULATIONS!!
You've just connected PSIcapture & PSIcapture Fusion