



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

QUICKstart

F2

Modified: 08.04.20

Screenshots:

PSIcapture 7.6.0.7

Fusion 3.2.25.0



PSIcapture
Fusion

Connecting PSIcapture and PSIcapture Fusion

Quick Start Guide

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

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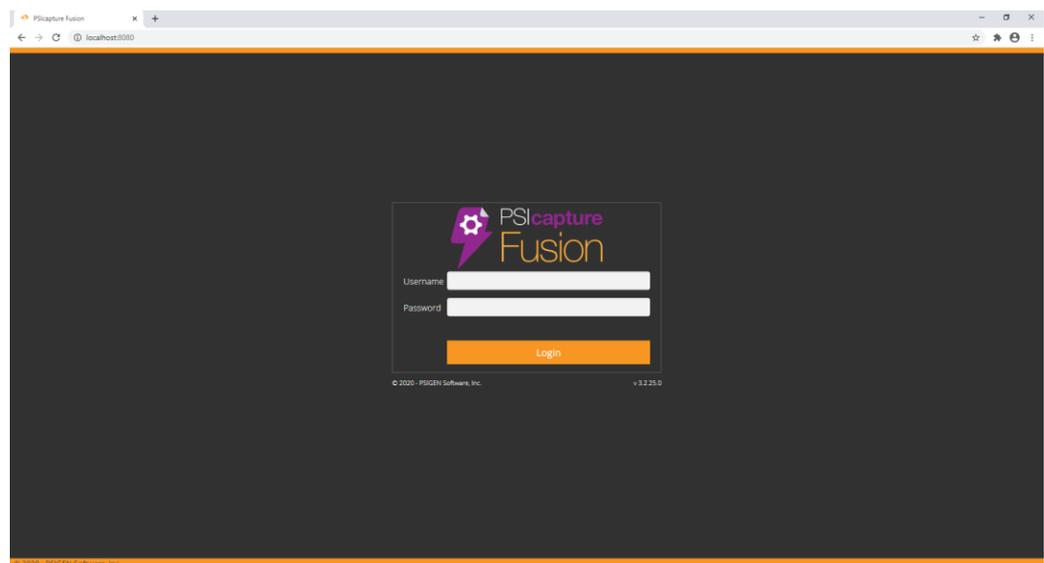
How do PScapture and PScapture Fusion work together?

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



Creating a PScapture Fusion Profile to Accept Migrations from PScapture

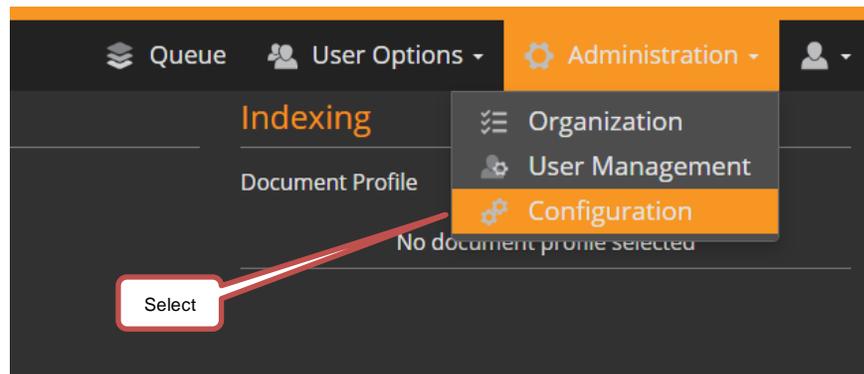
Login to PScapture Fusion as the Administrator (Password is Admin-01)



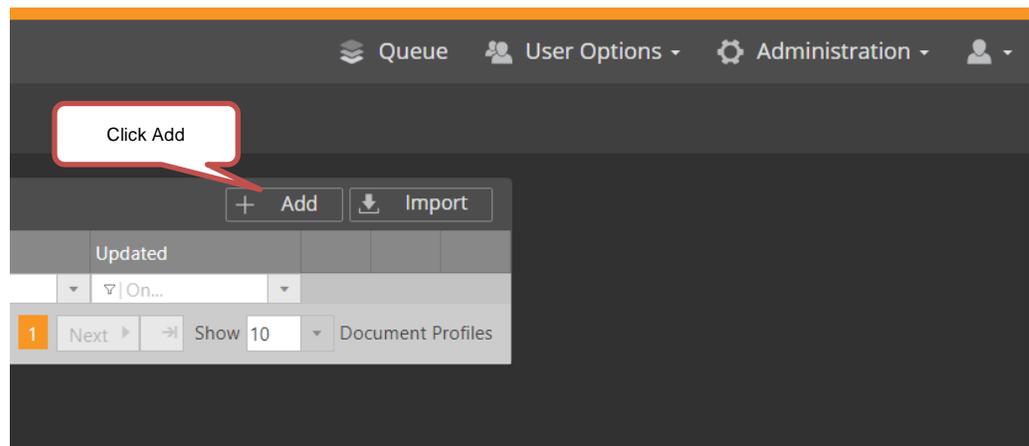
Select the Administration button from the top



Select the **Configuration**



Then click **Add**



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

The screenshot shows the 'Fusion administration' interface. The breadcrumb path is 'Configuration > Document Profiles > Add Document Profile'. The 'General' tab is selected. The form contains the following fields and options:

- Document Profile Name:** A text input field containing 'Invoice Processing', highlighted with a red box.
- Document Profile Output Folder Name:** A text input field containing 'Invoice Processing', highlighted with a red box.
- Description:** An empty text input field.
- Enable multiple records per document
- Copy field values when adding a record to a document

Next select the Fields tab

The screenshot shows the 'Fusion administration' interface with the 'Fields' tab selected. A red callout box labeled 'Select' points to the 'Fields' tab. The 'Index Fields' section is visible, containing a table with the following structure:

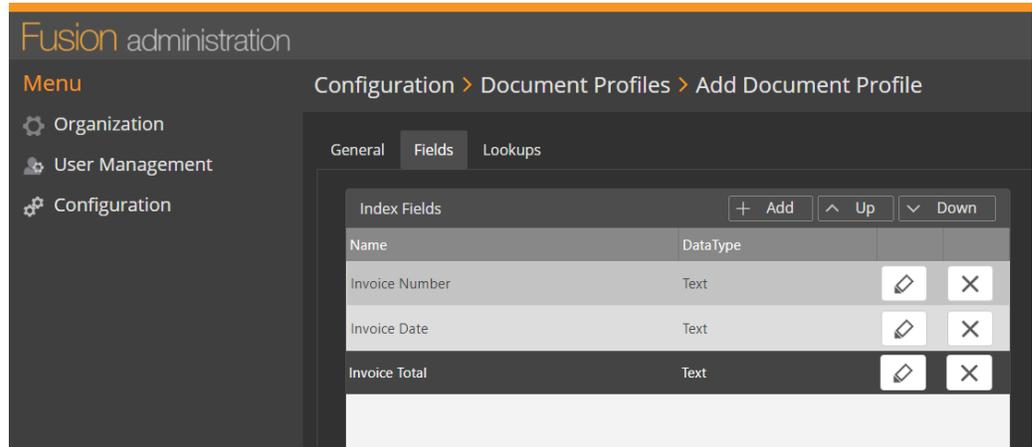
Name	DataType		

At the top right of the table are buttons for '+ Add', '^ Up', and 'v Down'.

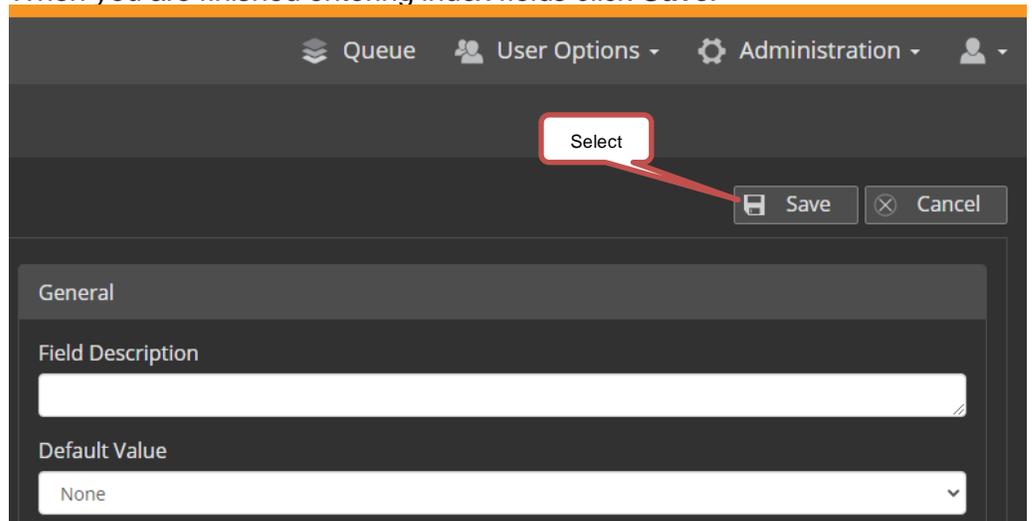
In the Fields tab, we will create Index Field values that match what was created in the PSIsapture Capture Profile.

Using the **Add** button, create three index fields

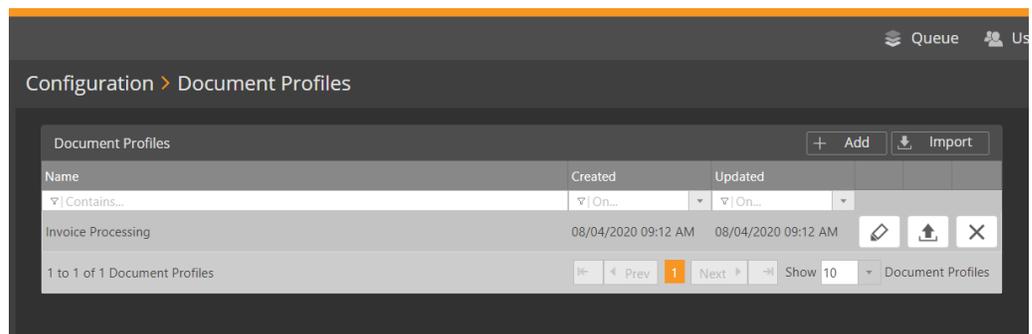
1. Invoice Number
2. Invoice Date
3. Invoice Total



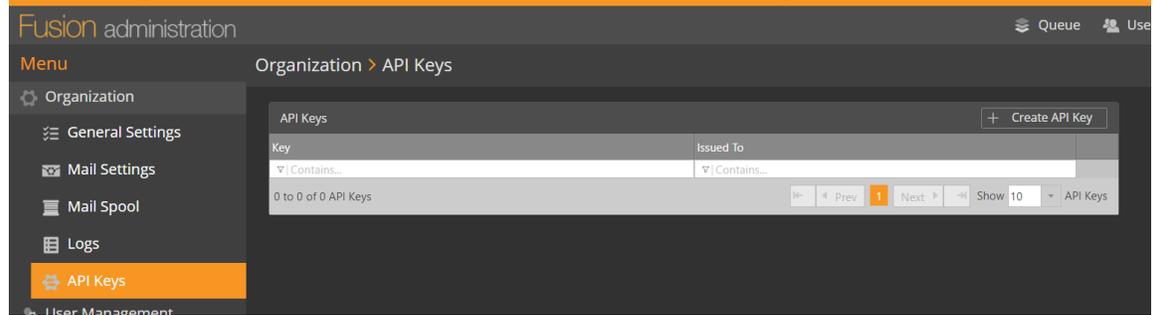
When you are finished entering index fields click **Save**.



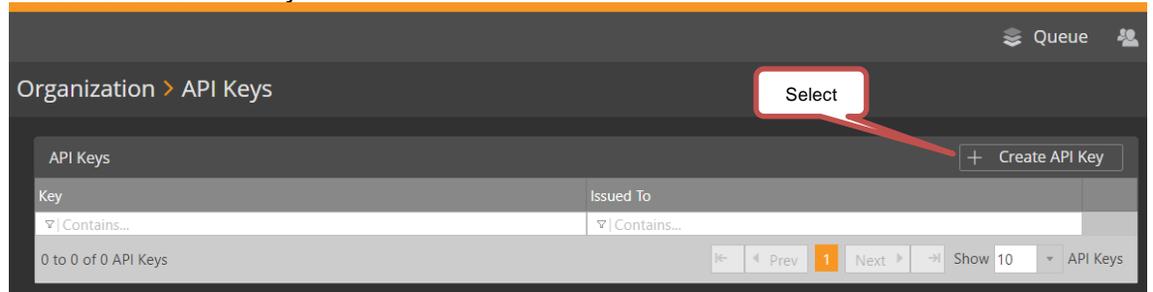
You should now see Invoice Processing listed in the Document Profiles tab.



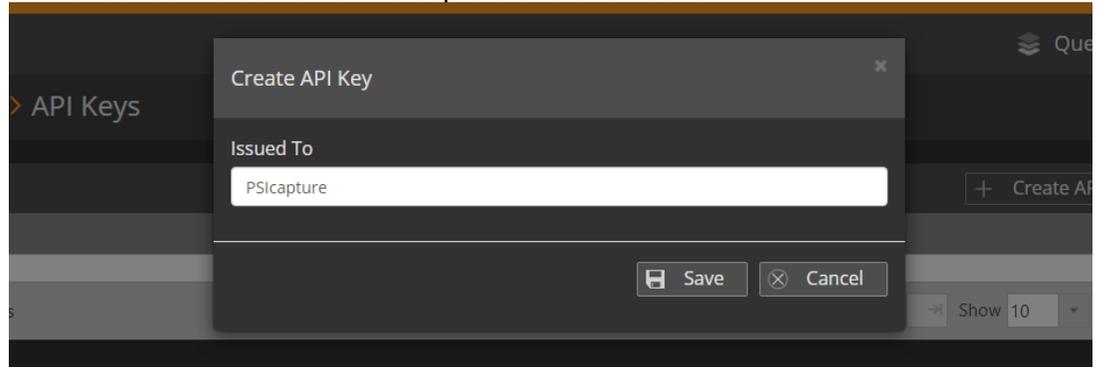
Select **Organization** from the left menu, then select **API Keys**



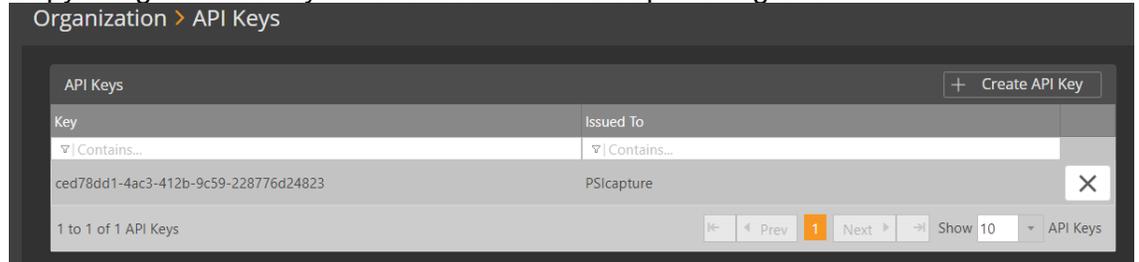
Select **Create API Key**



In the **Issued To** box enter PSICapture and click **Save**



Copy the generated key for later use in the PSICapture Migration



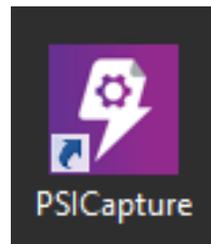
Click your user icon in upper right and then click **Logout**.

Creating a Migration from PSlcapture to PSlcapture Fusion

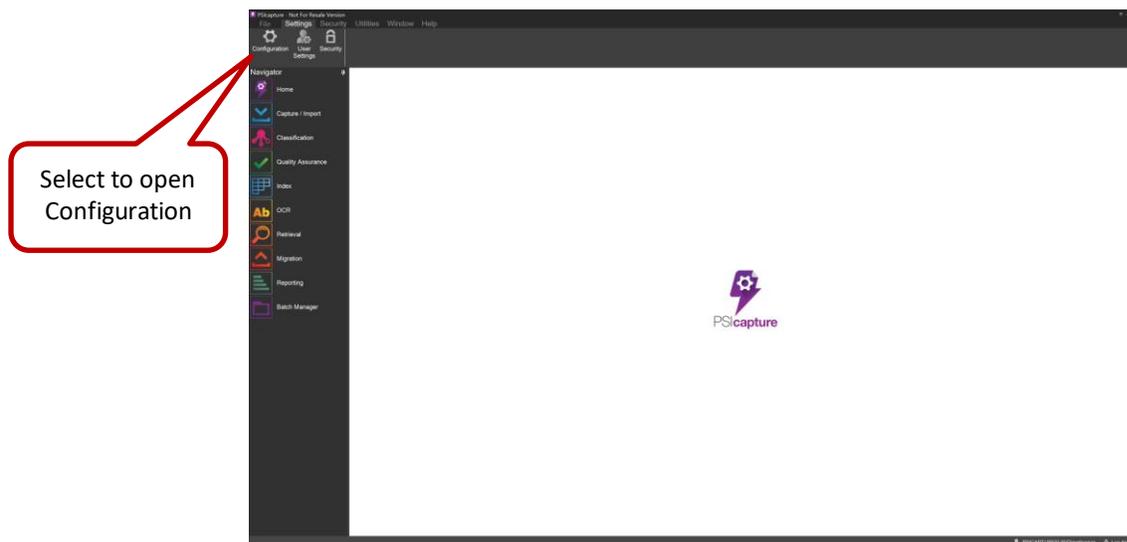
First, we will import the pre-configured PSlcapture Capture Profile accompanying this guide (F2 – PSlcapture to PSlcapture Fusion.xml). This Capture Profile has the standard PSlcapture items of import, separation, and indexing preconfigured in order to focus on adding a PSlcapture Fusion migration.

To Import:

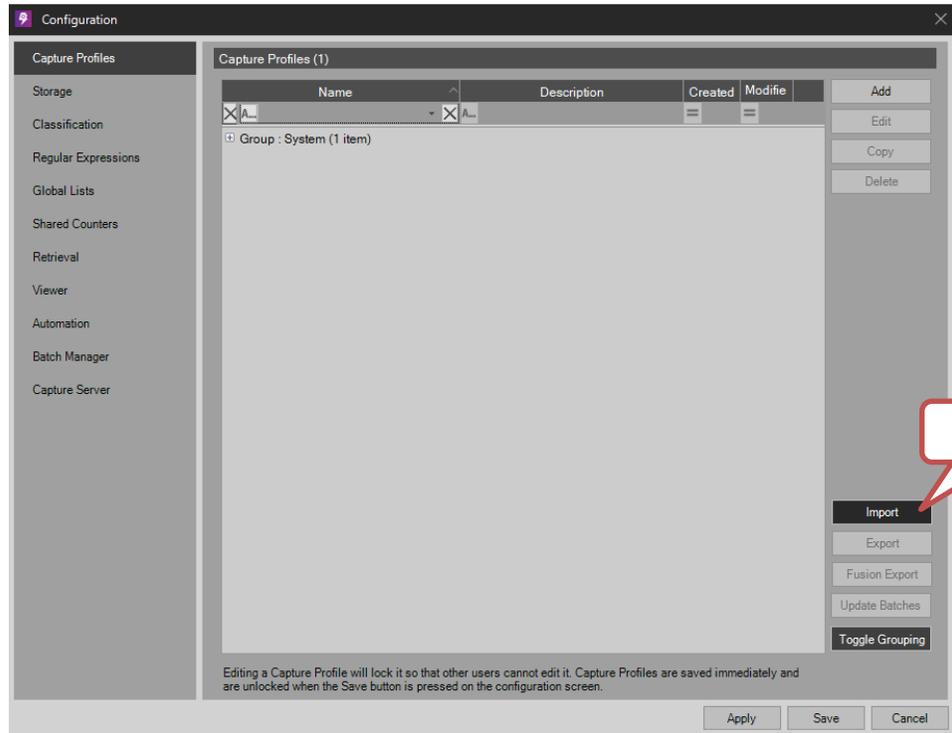
- Open PSlcapture by double clicking on the icon on your desktop



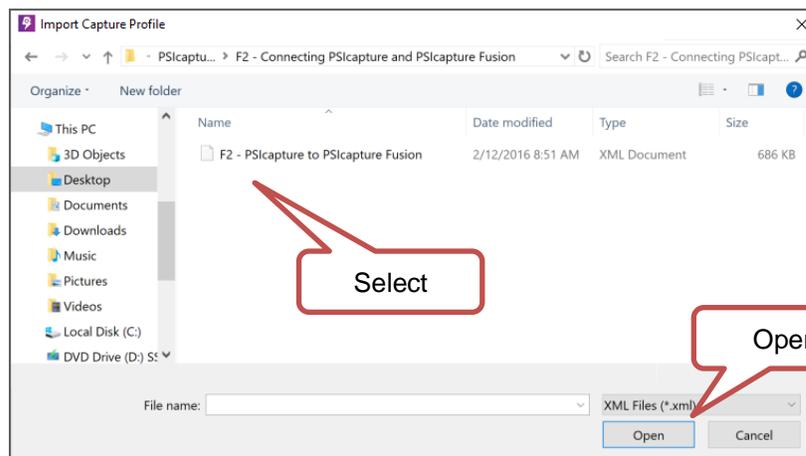
Once PSlcapture is open, select the Configuration icon from the Navigator Menu



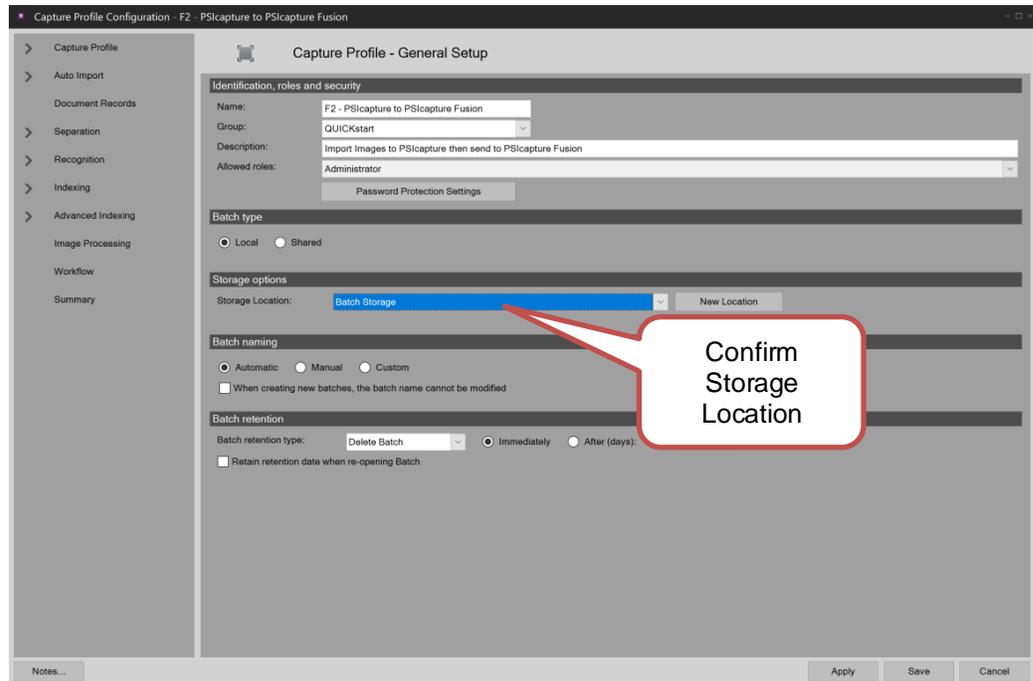
Click on the **Import** button on the right



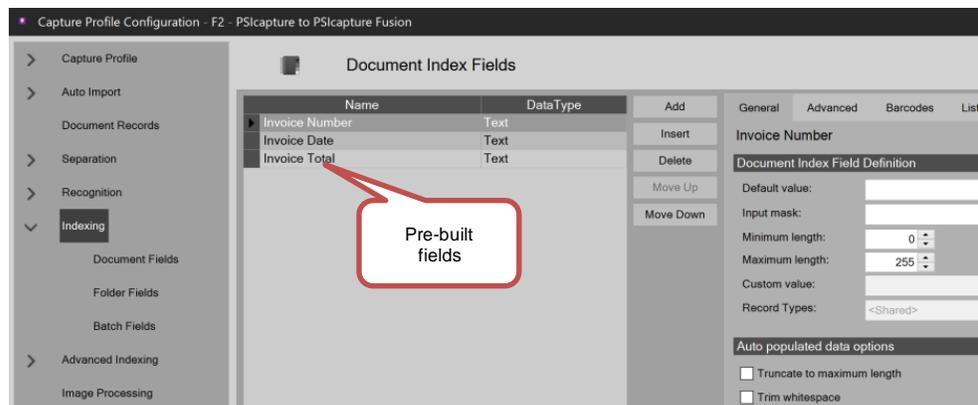
Browse to and select **F2 – PSicapture to PSicapture Fusion.xml** and click Open



On the General Setup screen, confirm the Batch Storage location

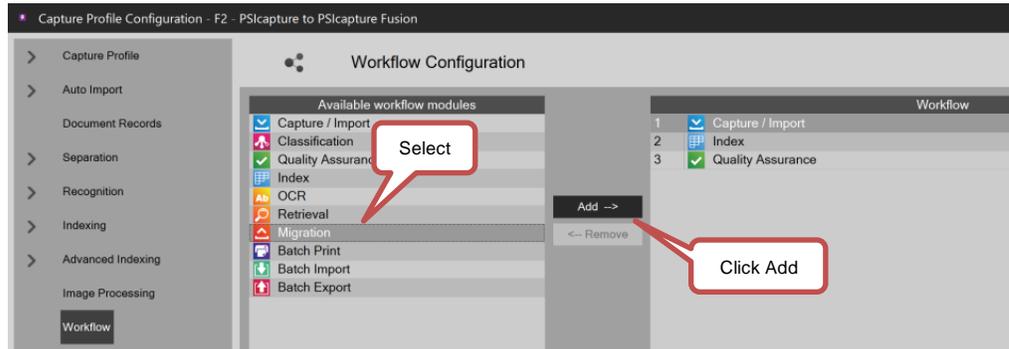


Select Indexing on the left Navigator
In Indexing you will see 3 pre-configured index fields for specific invoice values.

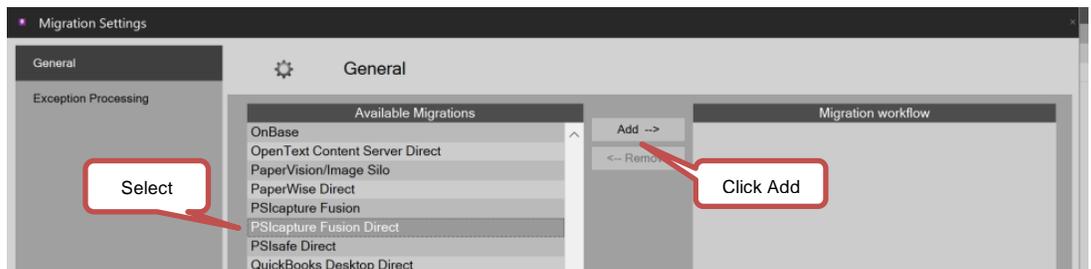


Select **Workflow** from the Navigator

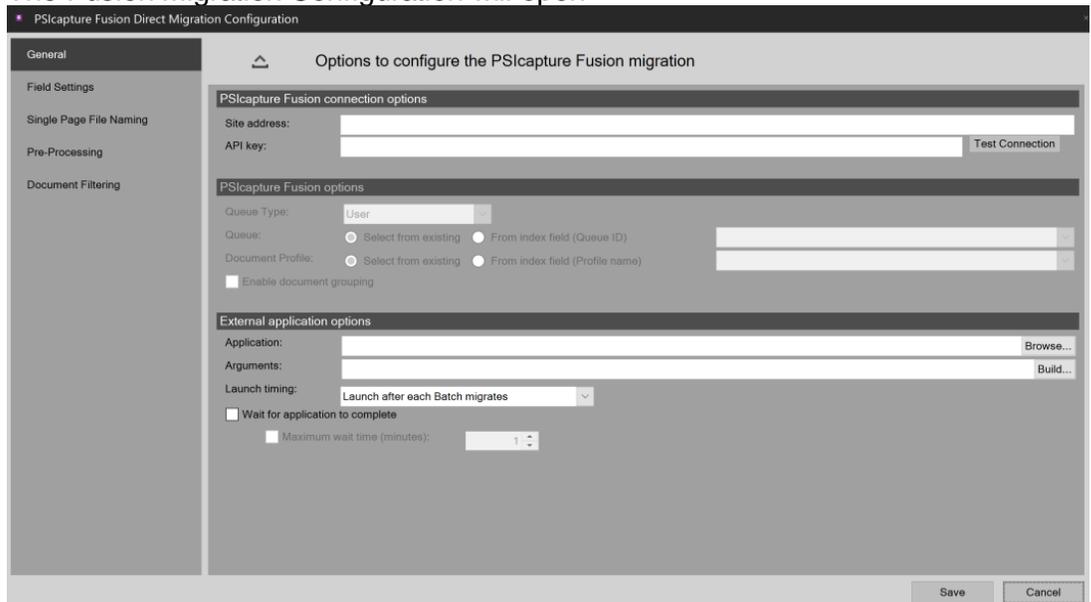
Select **Migration** from the available modules and **Add** to the Workflow



Scroll down the Available Migrations until you find **PSIcapture Fusion Direct**. Select and click **Add**

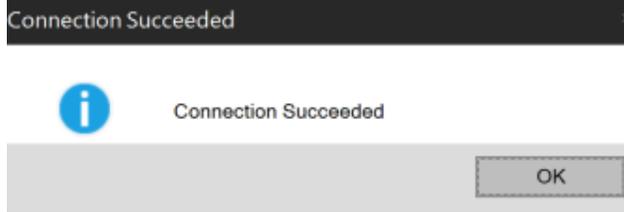


The Fusion Migration Configuration will open



Enter in your site address URL, if PS!capture 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 PS!capture index field. We will leave it set to migrate to the User Queue 1, System Administrator.

☆ Note:
User queues can be created in several different ways. In this instance we are assigning a default value of 1. This field could also be populated based on a return from a database lookup. Team queues are also available to organize and disperse images according to rules.

For more information on User and Team queues please refer to the PS!GEN wiki at help.psigen.com.

Confirm your index fields are mapped to the correct fields.

	Field Type	Field Name	Linked Field Name	Output Format	Include
1	Document	Invoice Number	Invoice Number		<input checked="" type="checkbox"/>
2	Document	Invoice Date	Invoice Date		<input checked="" type="checkbox"/>
3	Document	Invoice Total	Invoice Total		<input checked="" type="checkbox"/>
4	System	BatchID	BatchID		<input type="checkbox"/>
5	System	BatchName	BatchName		<input type="checkbox"/>
6	System	BatchCreateDate	BatchCreateDate		<input type="checkbox"/>

Click **Save** on the Migration Configuration

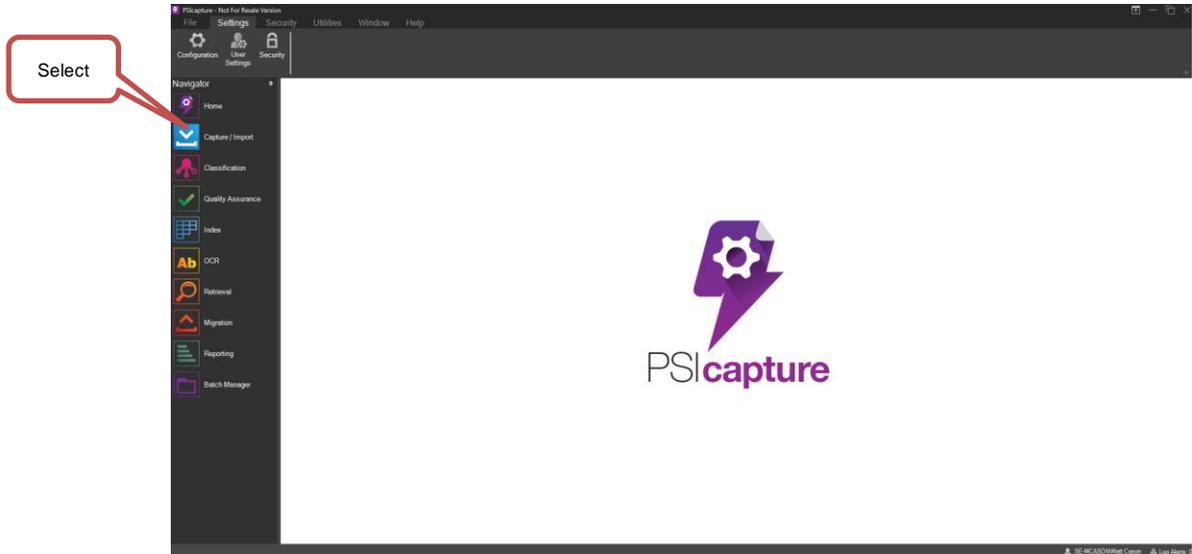
Back in the Migration Settings screen click Save



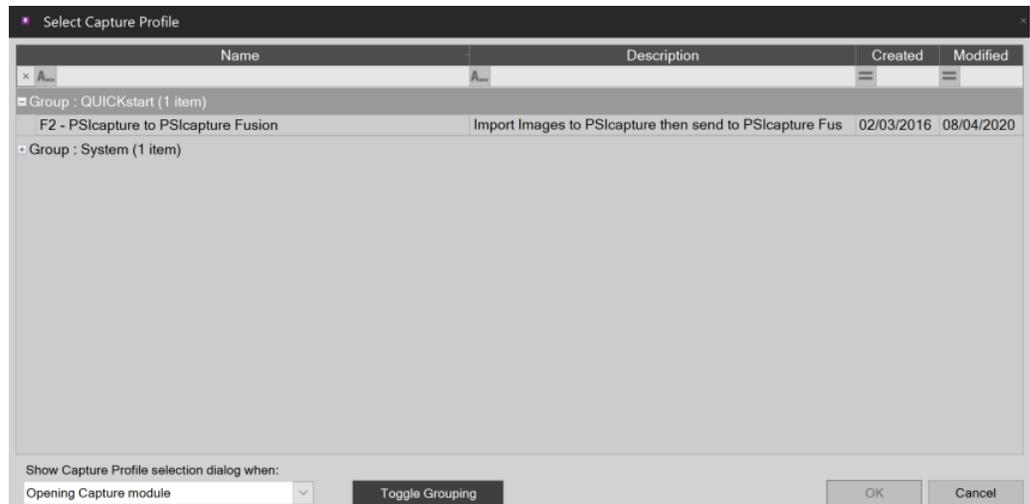
Save Capture Profile and Configuration back to the PSIcapture Home Screen.

Test Passing the Sample Images from PSICapture to PSICapture Fusion

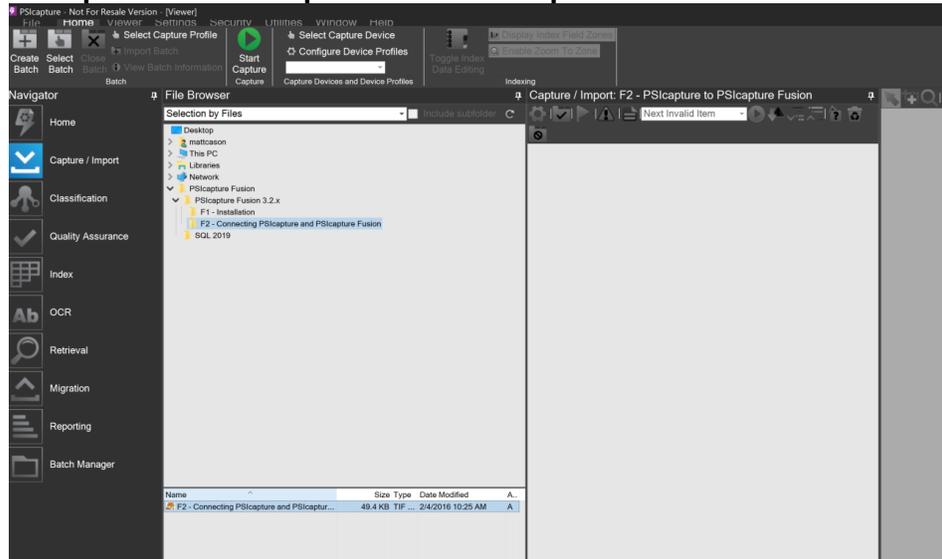
Open PSICapture and select Capture/Import



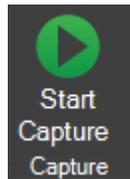
Select the Document Type **F2 – PSICapture to PSICapture Fusion** and click **OK**



Browse to and Select the Sample Image File called **F2 – Connecting PSICapture and PSICapture Fusion Sample.tif**



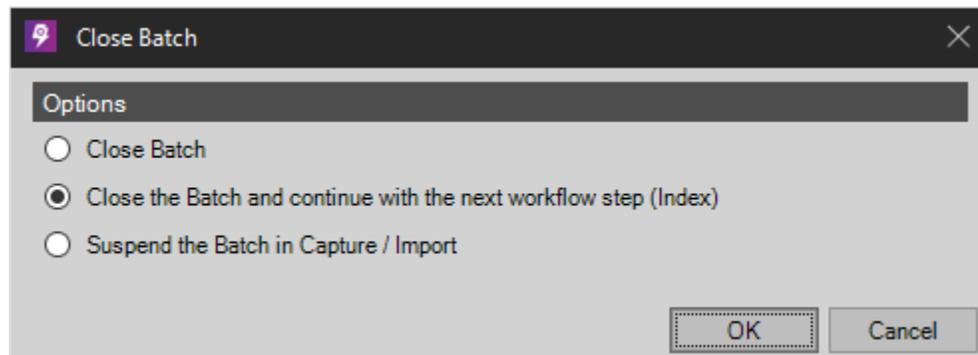
Click on the **Start Capture** button



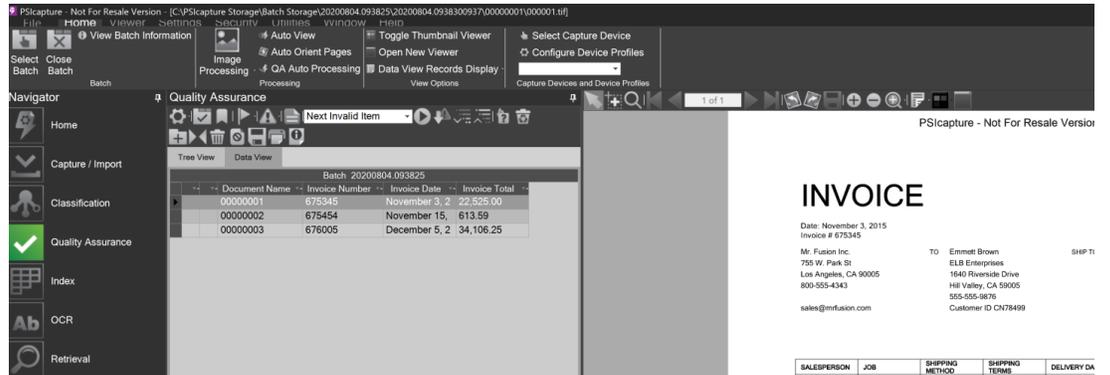
After the files are imported, click the **Close Batch** button



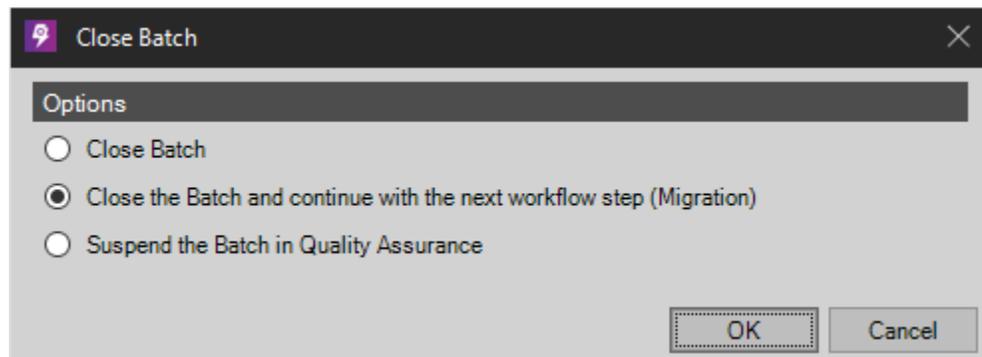
When the Close Batch dialogue appears click **OK** to continue to Index



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

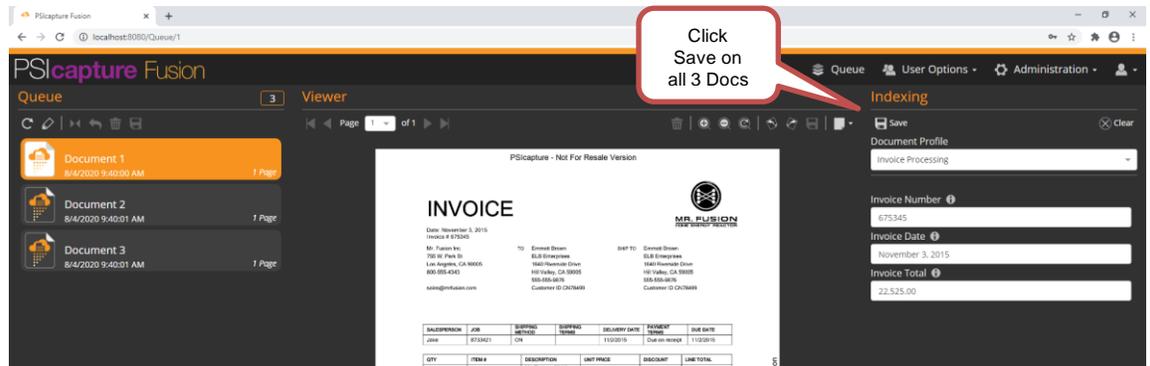


Click the **Close Batch** button to begin Migration:



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)



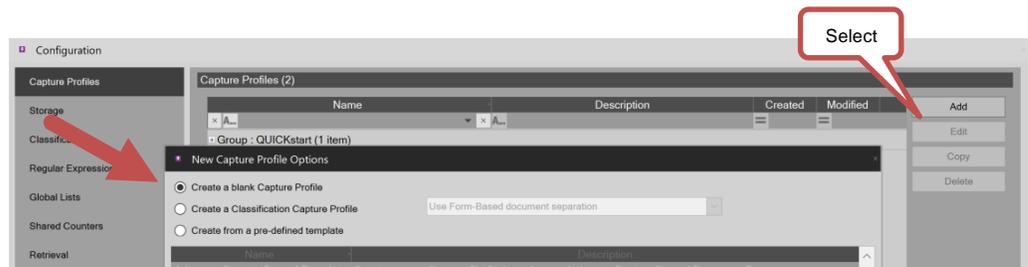
You should now have three Documents available in the Administrator's Queue.

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

The screenshot shows the 'Capture Profile - General Setup' window. The 'Storage Location' dropdown is set to 'Batch Storage'. A red callout box points to this dropdown with the text 'Confirm Storage Location'.

Select **Indexing** from the navigator

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

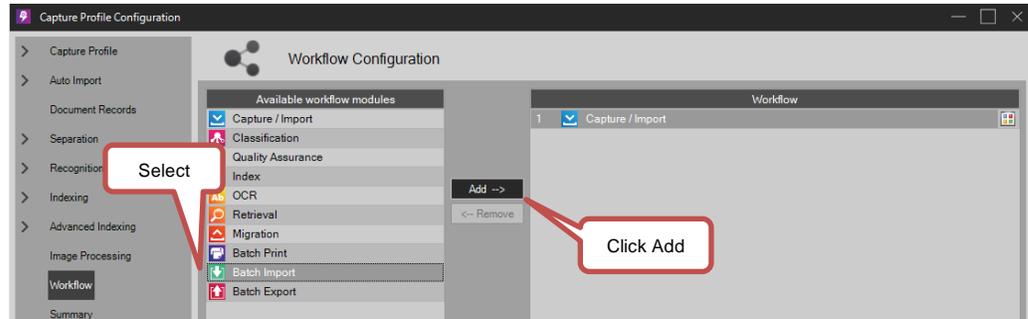
1. Invoice Number
2. Invoice Date
3. Invoice Total

The screenshot shows the 'Document Index Fields' window. The 'Indexing' tab is selected in the navigator. The 'Document Index Fields' table shows 'Invoice Number', 'Invoice Date', and 'Invoice Total' as text fields. The 'Add' button is visible.

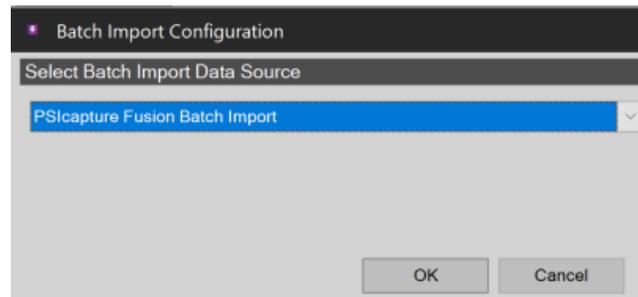
Name	DataType
Invoice Number	Text
Invoice Date	Text
Invoice Total	Text

Select **Workflow** from navigator

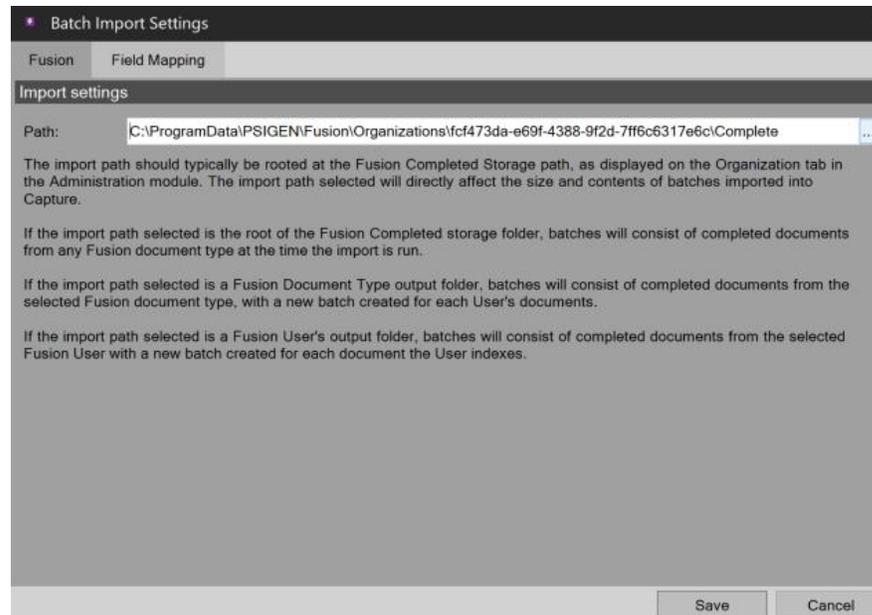
Select Batch Import from the Available Workflow Modules on the left and add it to the Workflow on the right.



From the dropdown select PSICapture Fusion Batch Import and click **OK**

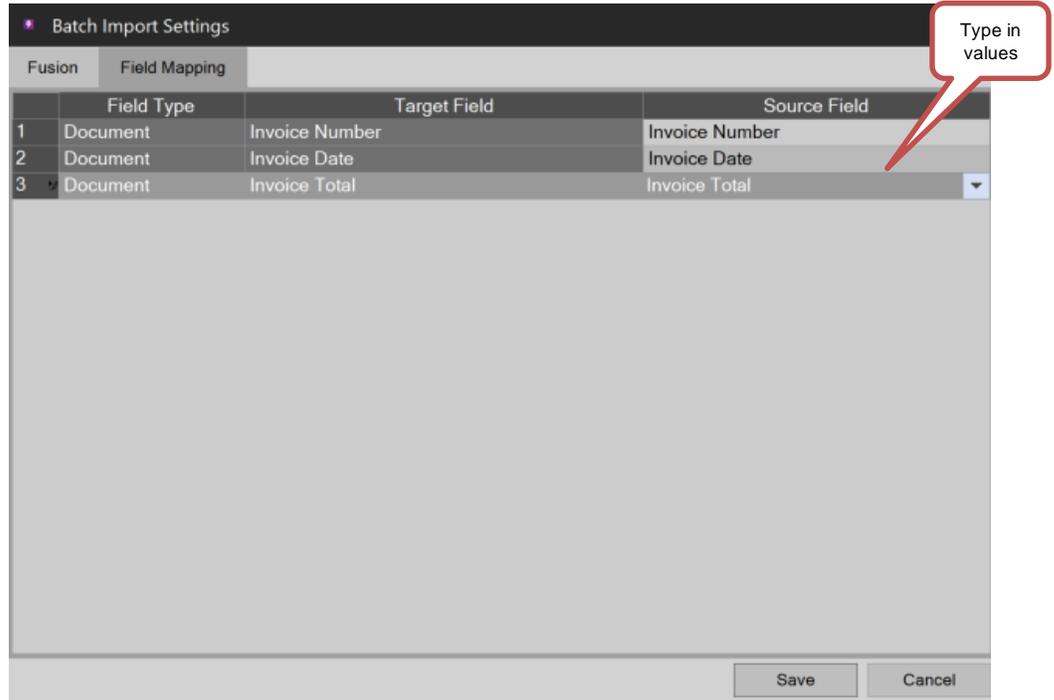


In the Batch Import Settings configuration, navigate to your Program Data\PSIGEN\Fusion\Organizations\



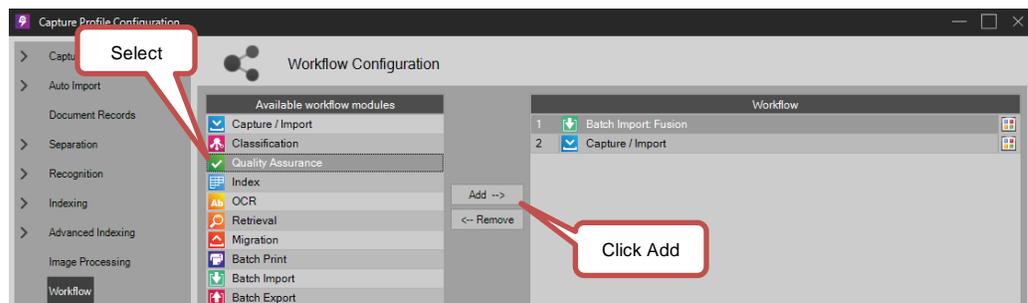
Click on the **Field Mapping** tab

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

The screenshot shows a panel titled "Viewing options" with the following settings:

- Default Batch View: Data View
- Default Data View: Document Records Only
- Default image view: Page View
- Thumbnail image size: Small
- Show file size in thumbnail viewer

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**.

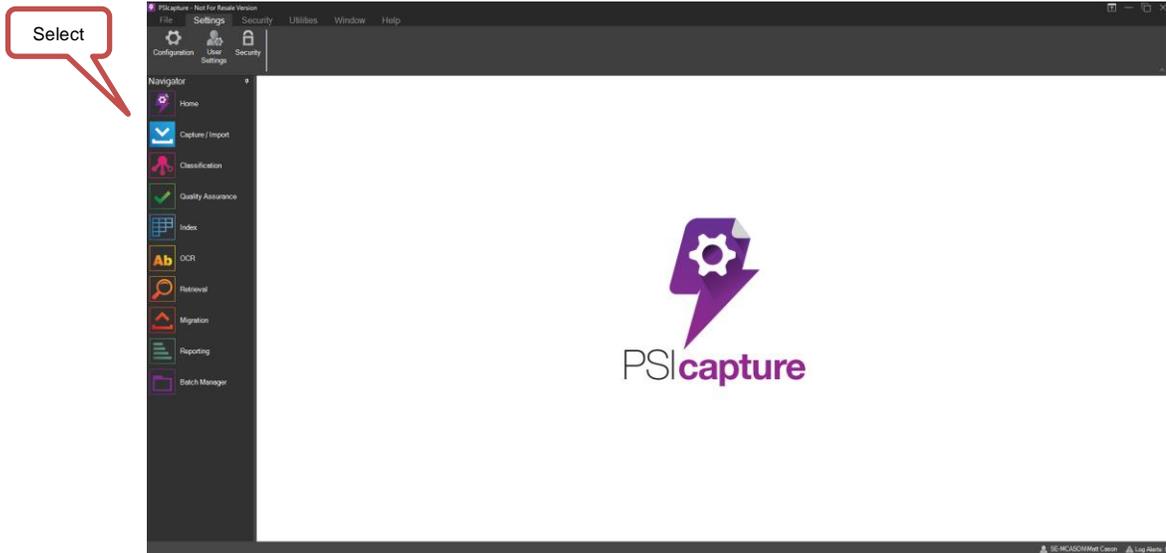
The screenshot shows a panel titled "Options" with the following settings:

- Default action for the "Close Batch" dialog: Continue in next Workflow Step
- Automatically close the Batch after the last module completes
- Attempt to auto-process the Batch through the workflow
(Batches will auto-close, auto-open, and begin processing in supported modules: Index, OCR, Migrations)
- Automatically delete empty Batches when auto-processing
- Generate a unique Exceptions Batch each time a module is run

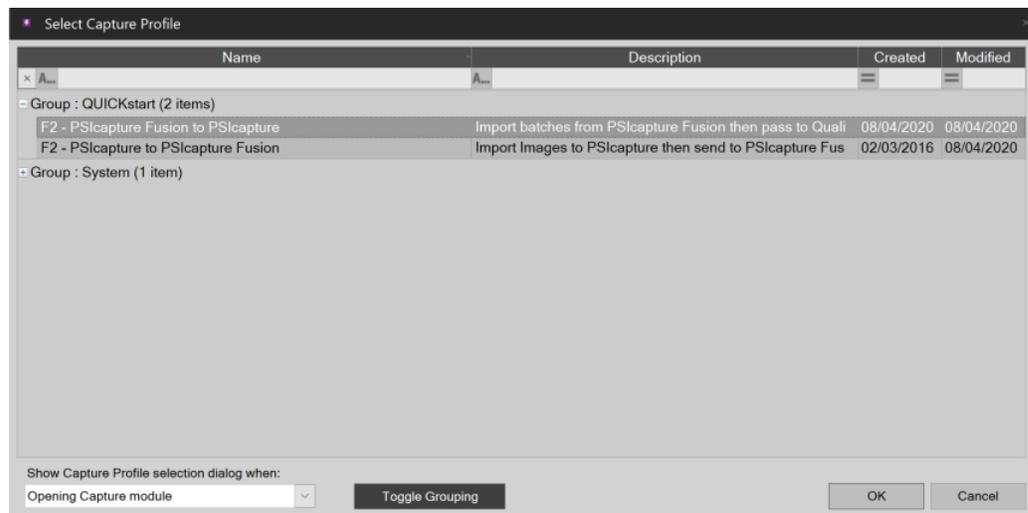
Save back to your home screen.

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

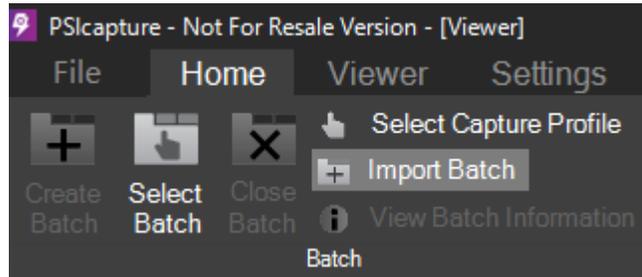
From the Home Screen select Capture/Import



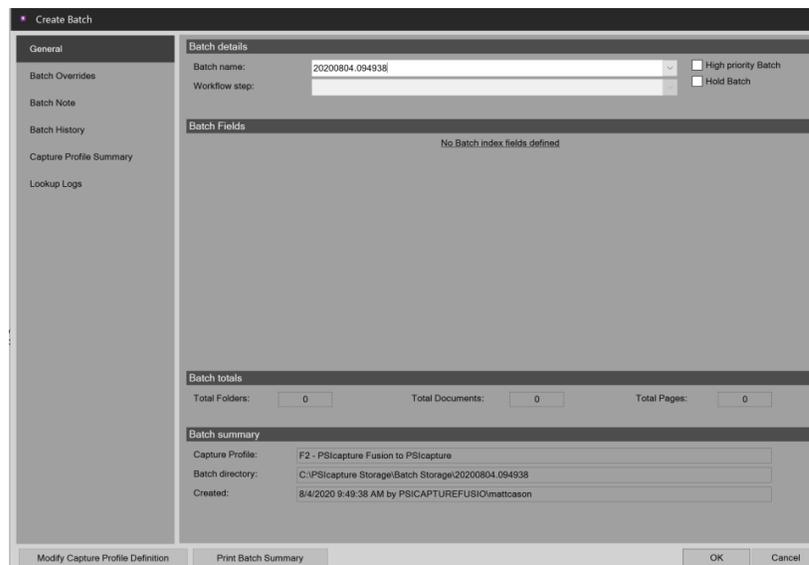
Select **F2 – PSICapture Fusion to PSICapture** and click **OK**



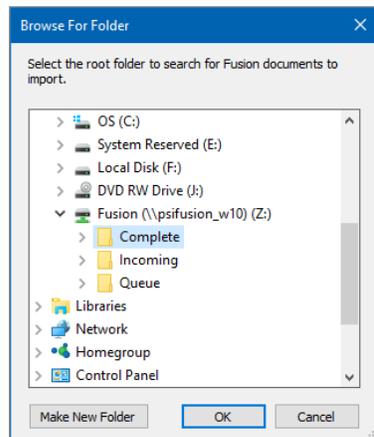
From the Capture/Import window click on the **Import Batch** Icon.



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

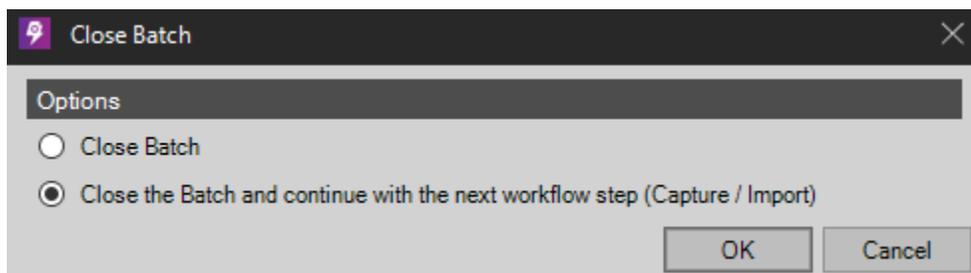


From the **Browse For Folder** screen, verify your PSICapture Fusion **Complete** folder is selected.

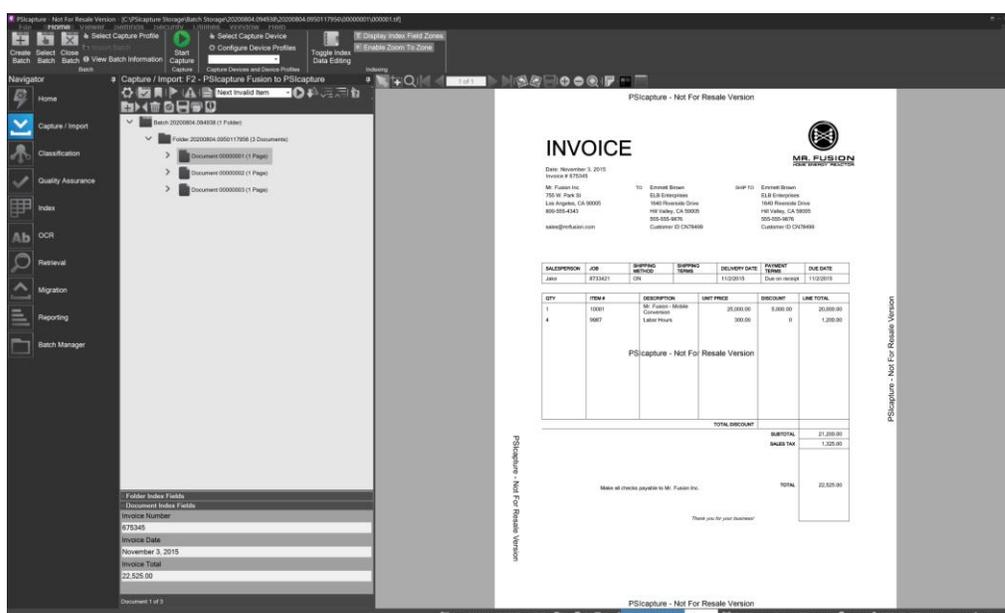


Click **OK**

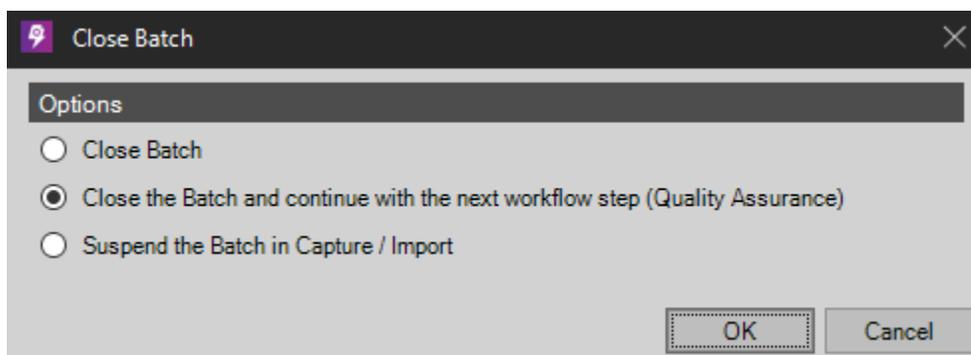
Click **OK** on the Close Batch message to Import the batch.



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 PSIsapture Fusion have imported in successfully into PSIsapture

The screenshot shows the Quality Assurance interface. On the left, a table displays the import summary for Batch 20200804.094938:

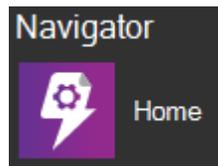
Document Name	Invoice Number	Invoice Date	Invoice Total
00000001	675345	November 3, 2015	22,525.00
00000002	675454	November 15, 2015	613.59
00000003	676005	December 5, 2015	34,106.25

On the right, an invoice document is displayed. The invoice is dated November 3, 2015, with invoice number 675345. It lists contact information for Mr. Fusion Inc. and Emmett Brown, along with shipping and payment details. Below the invoice text are two summary tables:

SALESPERSON	JOB	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE	PAYMENT TERMS	DUE DATE
Jake	8733421	ON		11/2/2015	Due on receipt	11/2/2015

QTY	ITEM #	DESCRIPTION	UNIT PRICE	DISCOUNT	LINE TOTAL
1	10001	Mr. Fusion - Mobile Conversion	25,000.00	5,000.00	20,000.00
4	9987	Labor Hours	300.00	0	1,200.00

Click on Home to return to the Home Screen.



You have now moved a set of images from PSIsapture into PSIsapture Fusion and then back to PSIsapture. 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 PSIsapture & PSIsapture Fusion