



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.



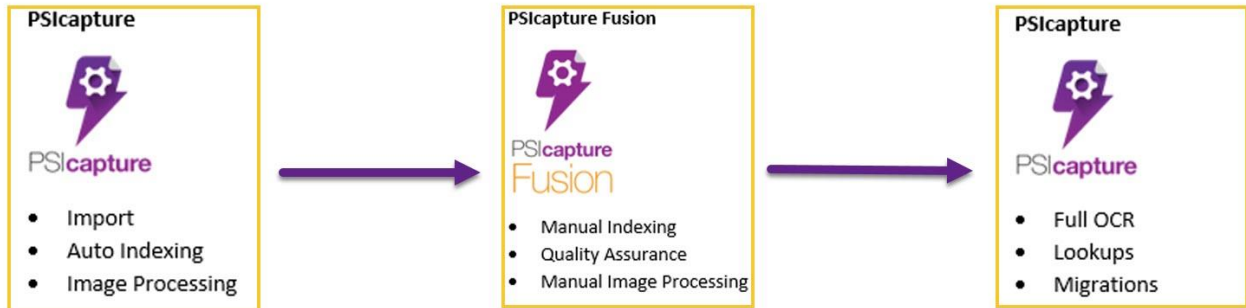
Requirements:

- 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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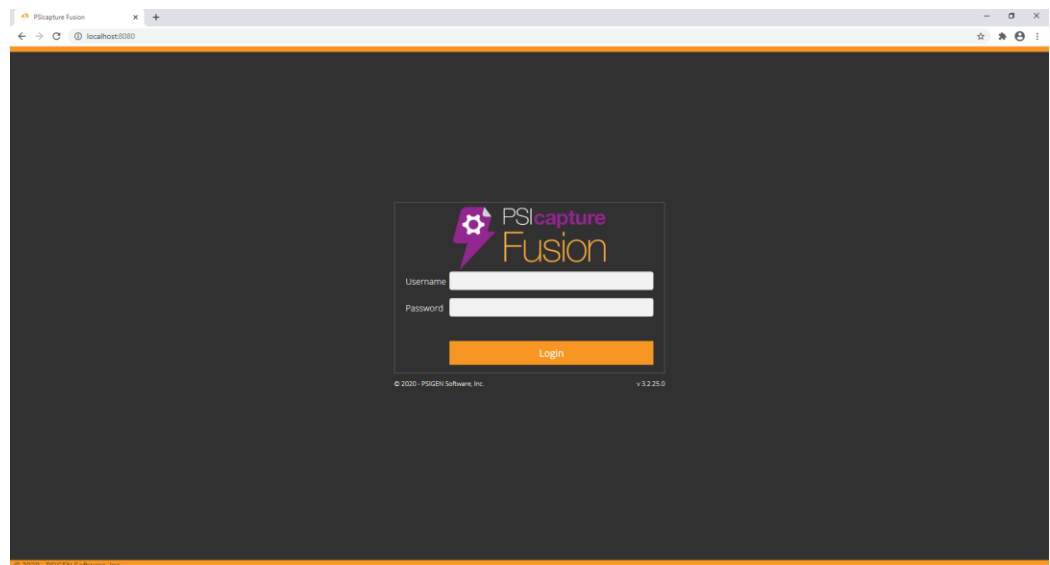
How do PSIs capture and PSIs capture Fusion work together?

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

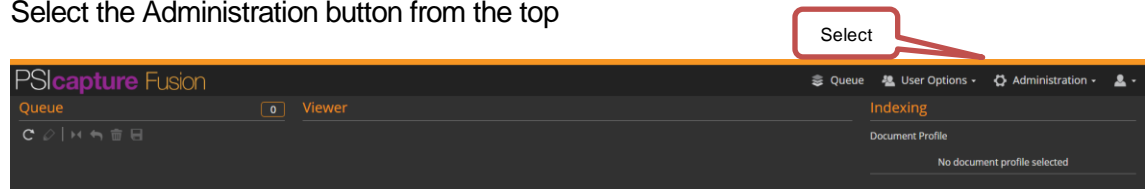


Creating a PSIs capture Fusion Profile to Accept Migrations from PSIs capture

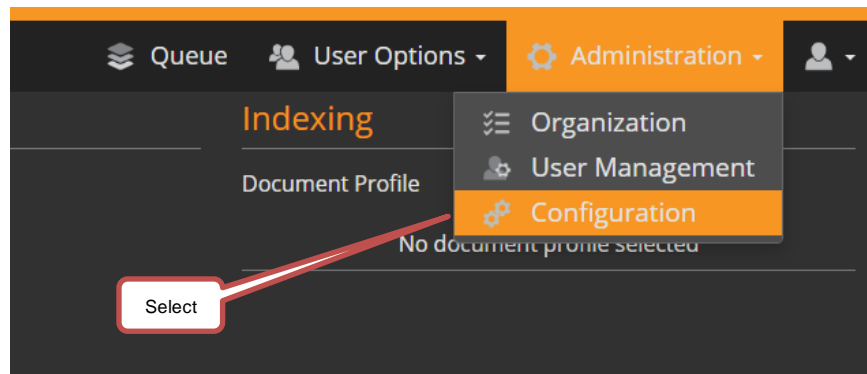
Login to PSIs capture Fusion as the Administrator (Password is Admin-01)



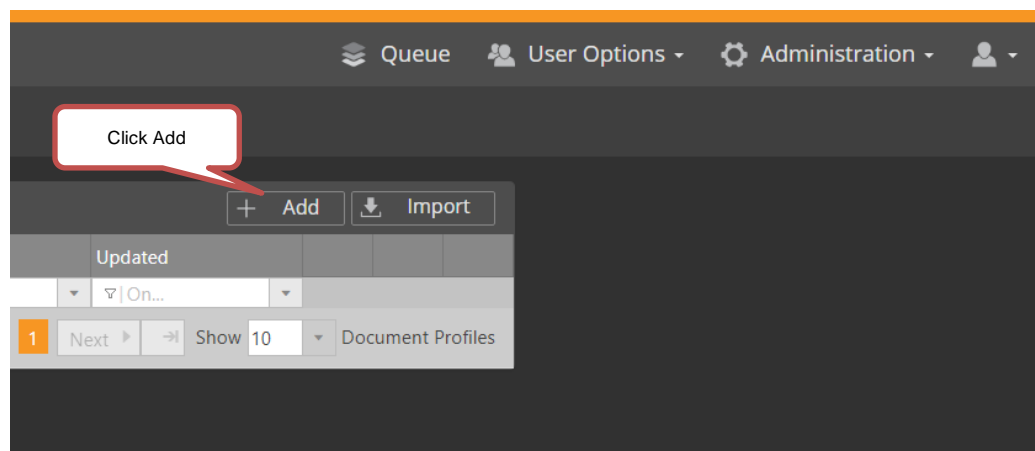
Select the Administration button from the top



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. On the left is a 'Menu' with 'Organization', 'User Management', and 'Configuration'. The main area is titled 'Configuration > Document Profiles > Add Document Profile'. It has three tabs: 'General', 'Fields', and 'Lookups'. The 'General' tab is active. It contains three text input fields: 'Document Profile Name' (with 'Invoice Processing' entered), 'Document Profile Output Folder Name' (with 'Invoice Processing' entered), and 'Description' (empty). Below these are two checkboxes: 'Enable multiple records per document' (unchecked) and 'Copy field values when adding a record to a document' (unchecked). Red boxes highlight the 'Invoice Processing' text in both the first two input fields.

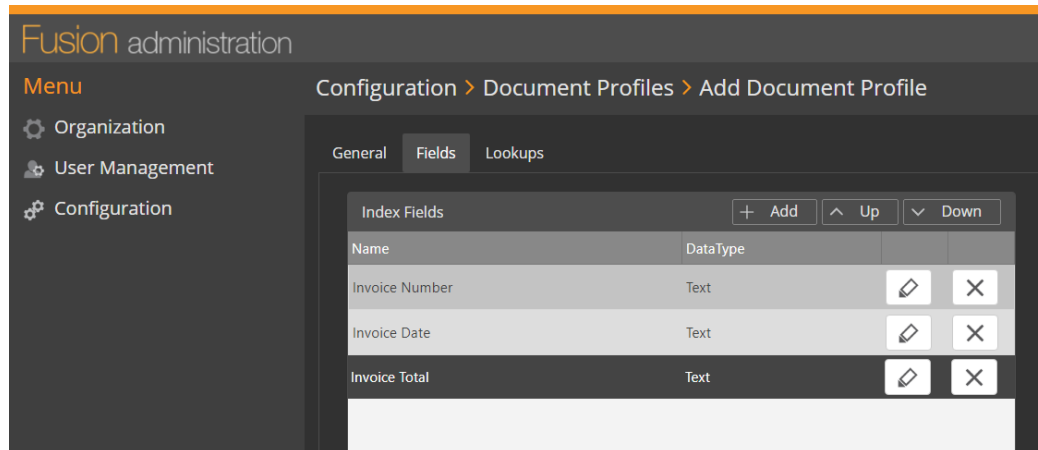
Next select the Fields tab

The screenshot shows the same 'Fusion administration' interface, but the 'Fields' tab is now selected. A red speech bubble with the word 'Select' points to the 'Fields' tab. The 'Index Fields' section is visible, featuring a table with columns 'Name' and 'DataType'. Above the table are buttons for '+ Add', '^ Up', and 'v Down'. The table is currently empty.

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



Fusion administration

Menu

- Organization
- User Management
- Configuration

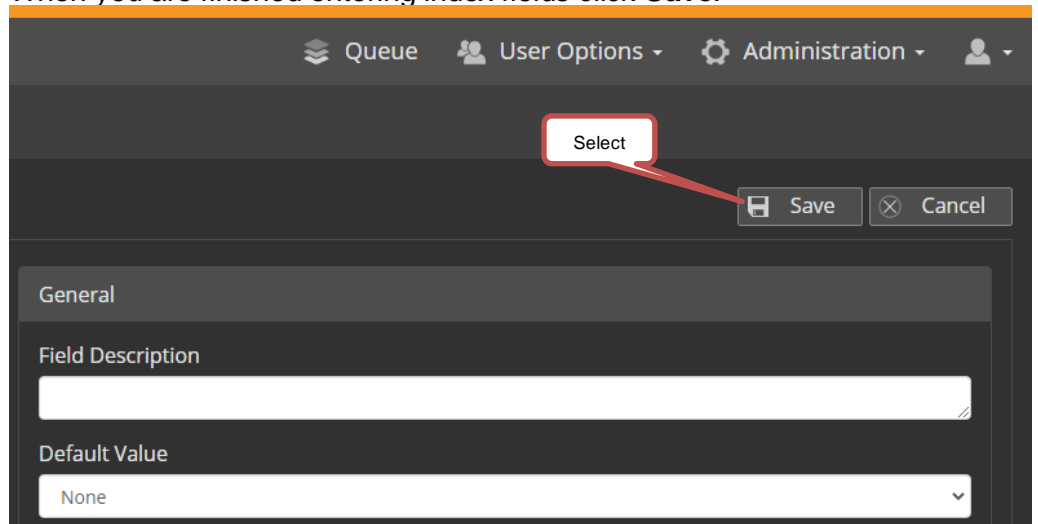
Configuration > Document Profiles > Add Document Profile

General Fields Lookups

Index Fields

Name	DataType		
Invoice Number	Text		
Invoice Date	Text		
Invoice Total	Text		

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



Queue User Options Administration

Select

Save Cancel

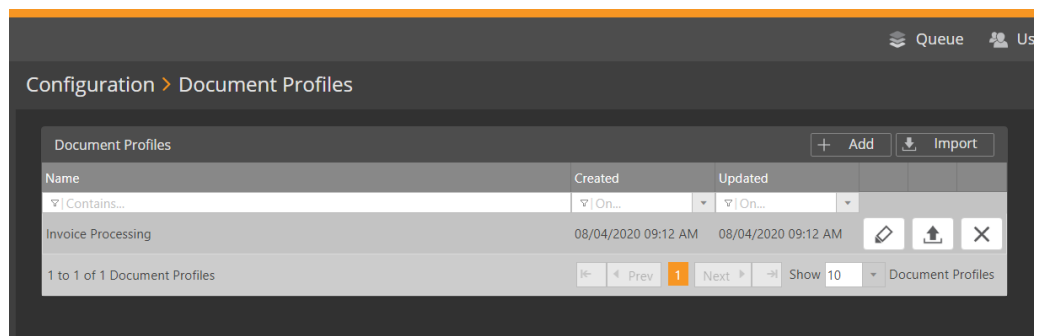
General

Field Description

Default Value

None

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



Queue User Options

Configuration > Document Profiles

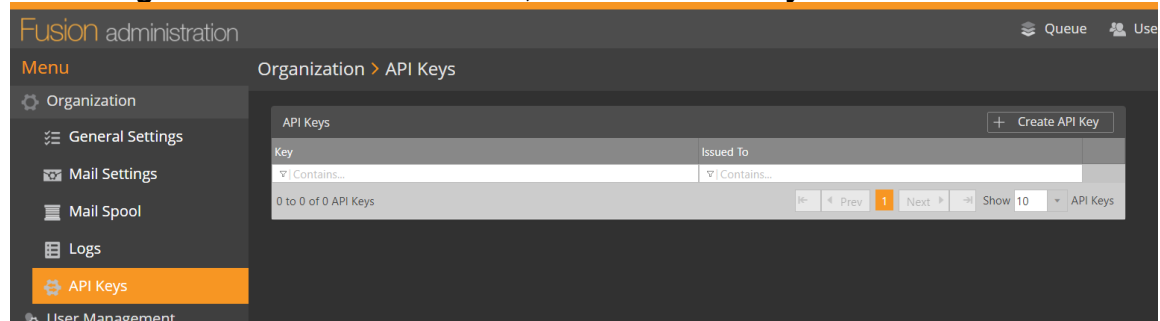
Document Profiles

Name	Created	Updated			
Invoice Processing	08/04/2020 09:12 AM	08/04/2020 09:12 AM			

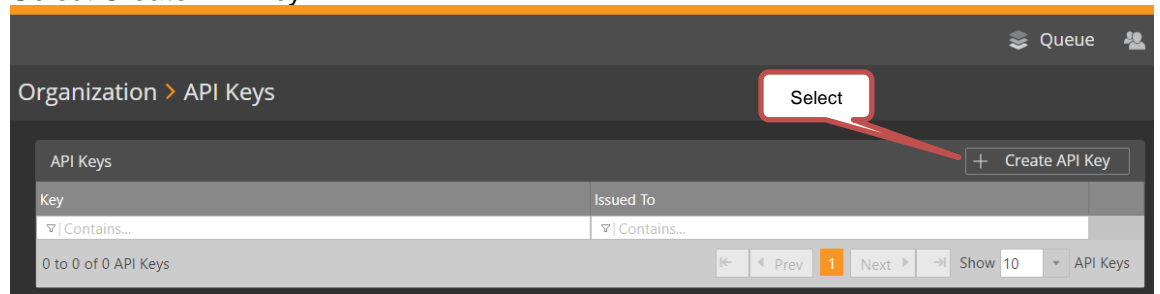
1 to 1 of 1 Document Profiles

Prev 1 Next Show 10 Document Profiles

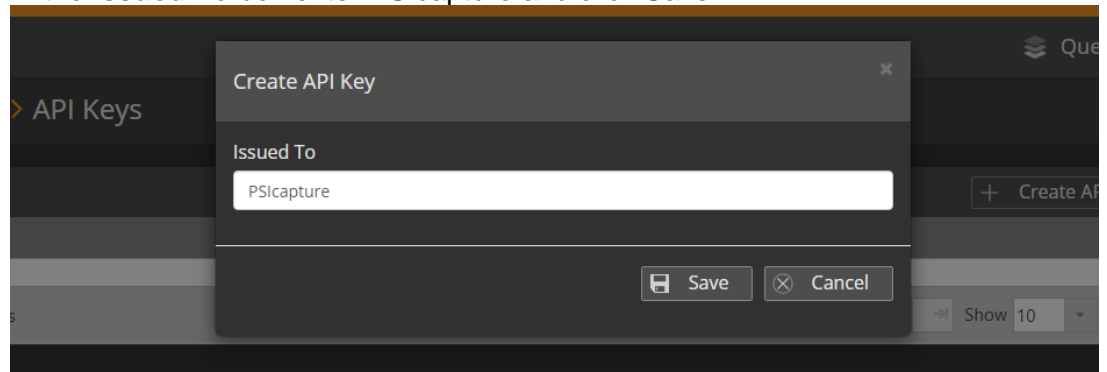
Select **Organization** from the left menu, then select **API Keys**



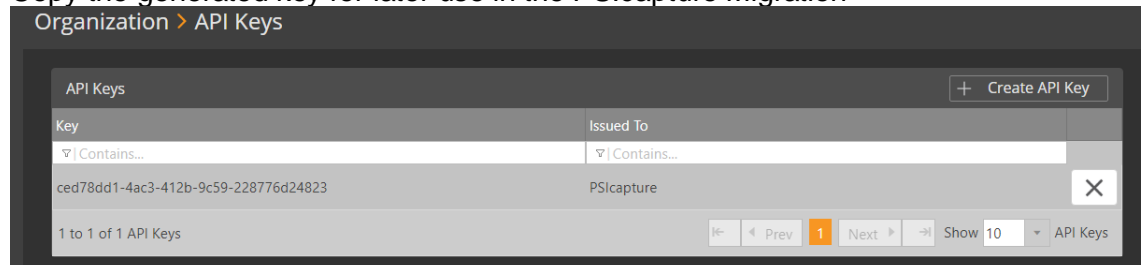
Select **Create API Key**



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



Copy the generated key for later use in the PSIsapture Migration



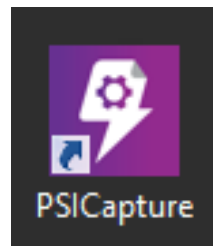
Click your user icon in upper right and then click Logout.

Creating a Migration from PSIsapture to PSIsapture Fusion

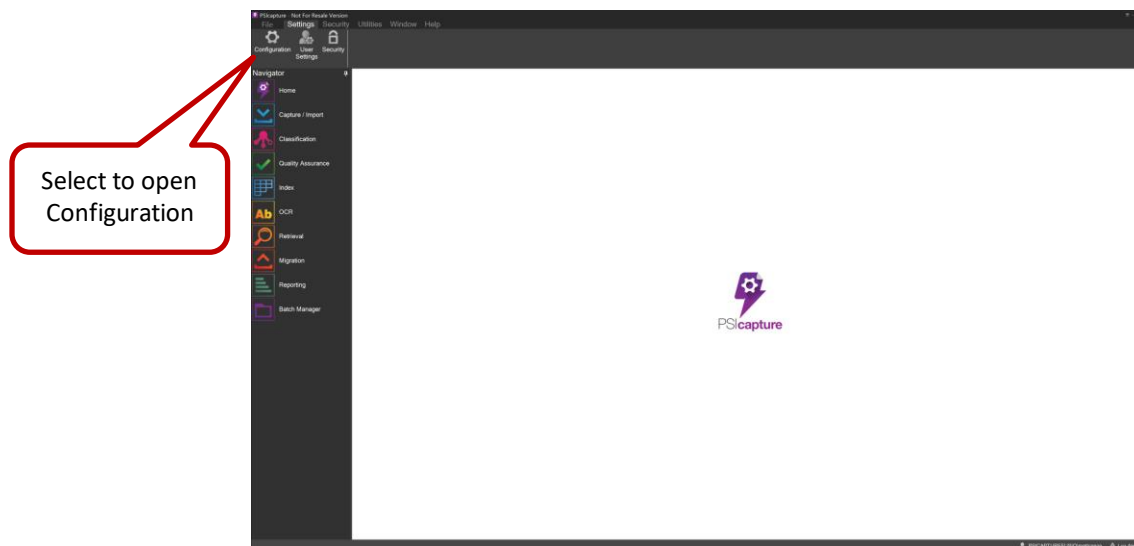
First, we will import the pre-configured PSIsapture Capture Profile accompanying this guide (F2 – PSIsapture to PSIsapture Fusion.xml). This Capture Profile has the standard PSIsapture items of import, separation, and indexing preconfigured in order to focus on adding a PSIsapture Fusion migration.

To Import:

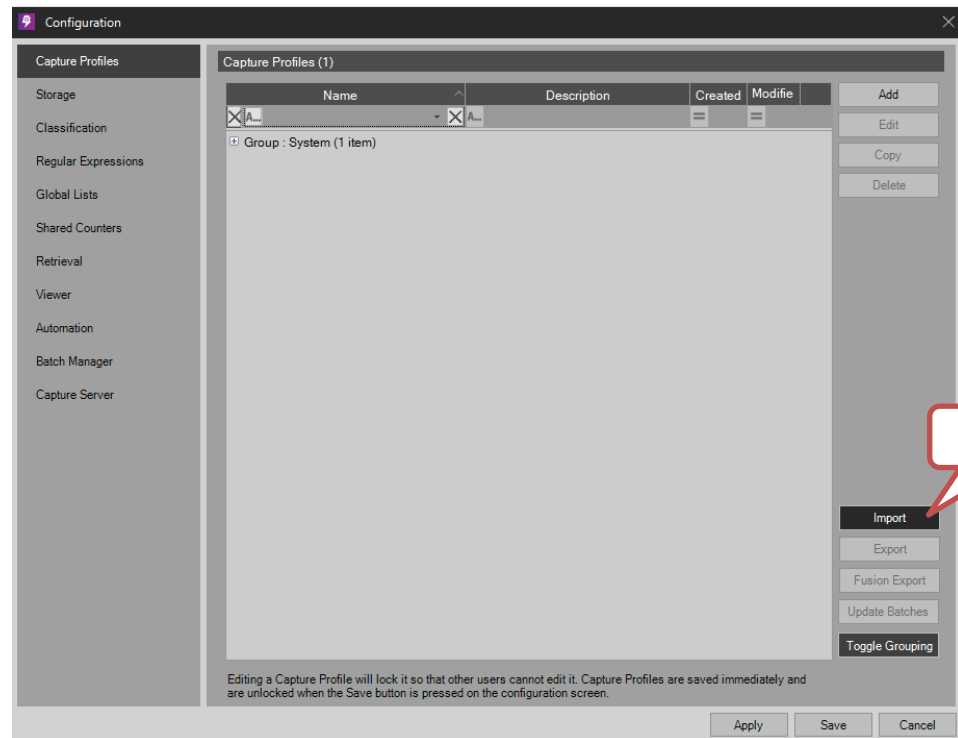
- Open PSIcapture by double clicking on the icon on your desktop



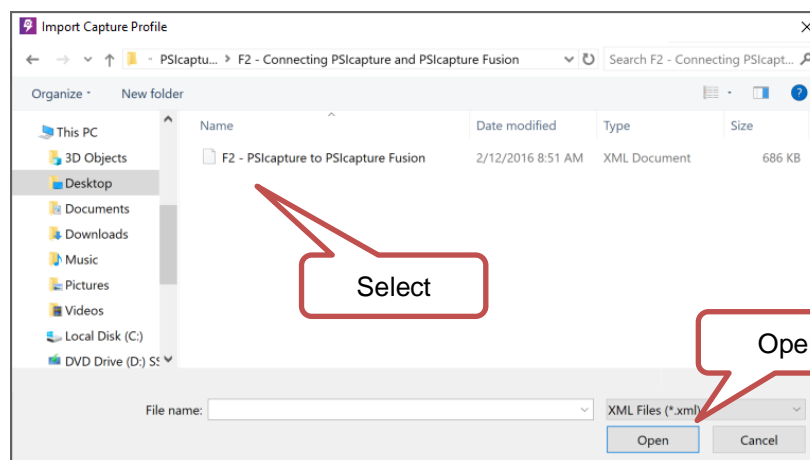
Once PSIs capture is open, select the Configuration icon from the Navigator Menu.



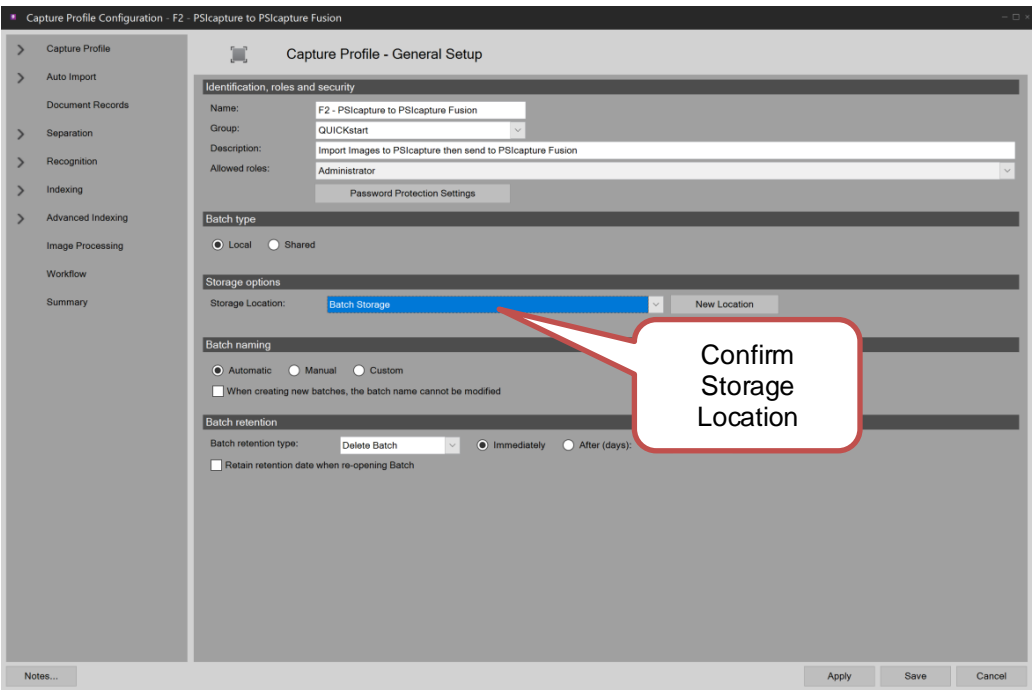
Click on the **Import** button on the right



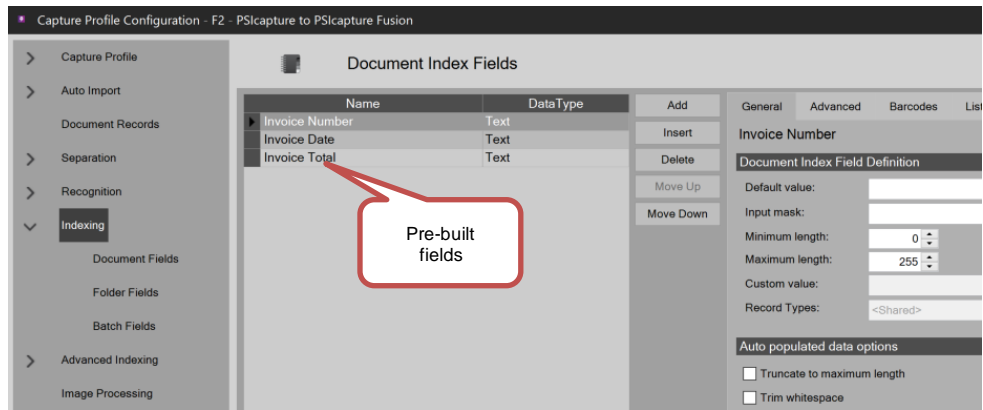
Browse to and select **F2 – PSICapture to PSICapture Fusion.xml** and click Open



On the General Setup screen, confirm the Batch Storage location

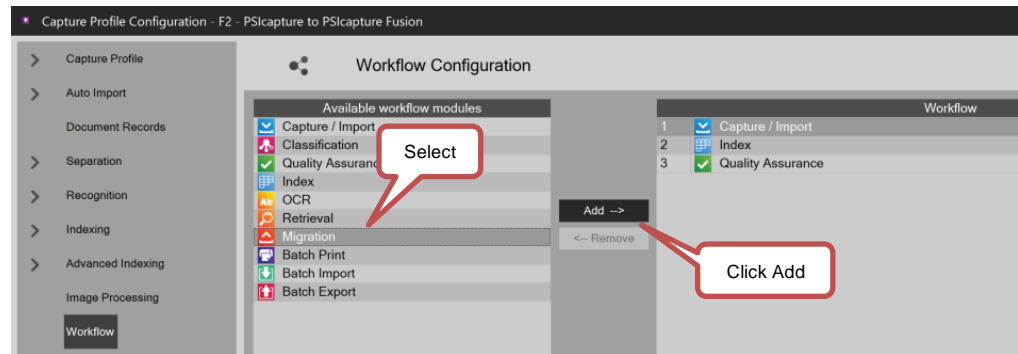


Select Indexing on the left Navigator
In Indexing you will see 3 pre-configured index fields for specific invoice values.

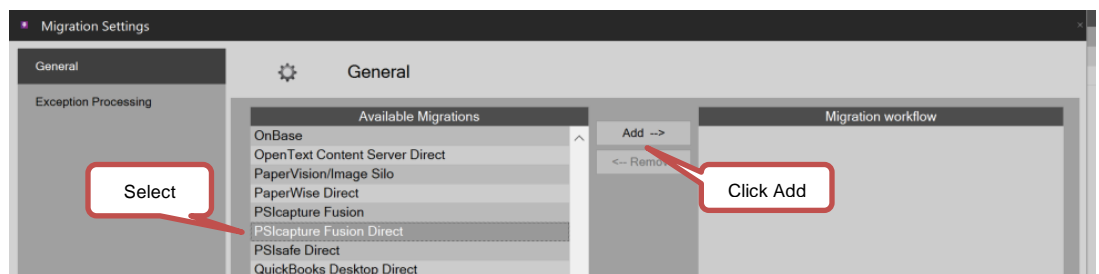


Select **Workflow** from the Navigator

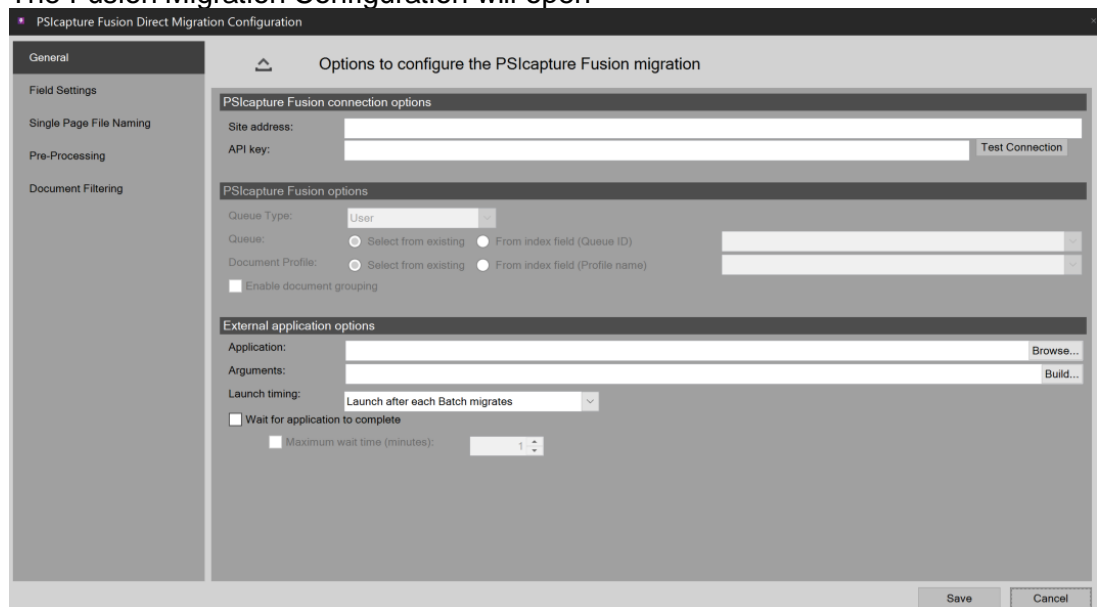
Select **Migration** from the available modules and **Add** to the Workflow



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 PSIsapture 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**

PSIsapture Fusion Direct Migration Configuration

Options to configure the PSIsapture Fusion migration

PSIsapture Fusion connection options

Site address:

API key:

Select

Test Connection

If settings are correct you should see a Connection Succeeded message

Connection Succeeded

 Connection Succeeded

OK

☆ 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.

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 PSIsapture index field. We will leave it set to migrate to the User Queue 1, System Administrator.

PSIsapture Fusion options

Queue Type:

Queue: ☐ Select from existing ☐ From index field (Queue ID)

Document Profile: ☐ Select from existing ☐ From index field (Profile name)

☐ Enable document grouping

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

Confirm your index fields are mapped to the correct fields.

PSIsapture Fusion Direct Migration Configuration

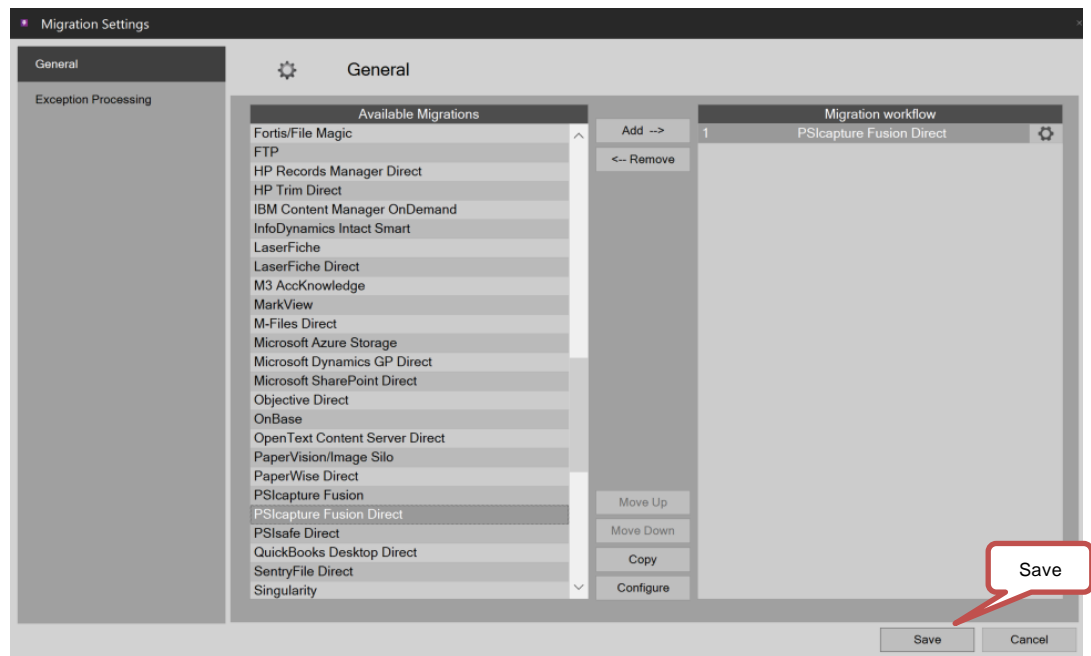
Settings to select and format the fields being migrated

Field setting options

	Field Type	Field Name	Linked Field Name	Output Format	<input type="checkbox"/> 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

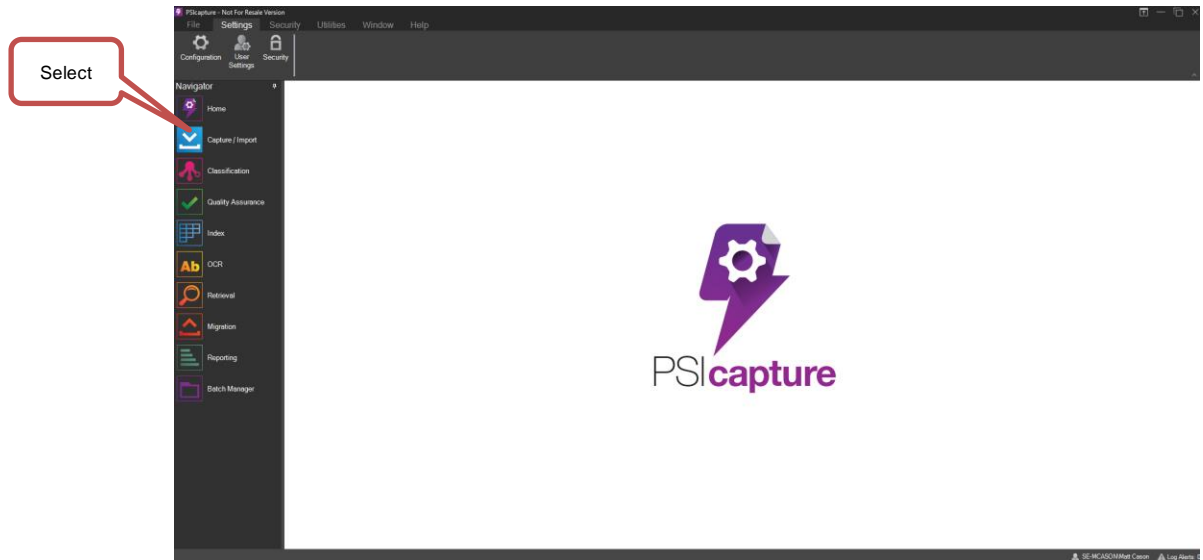
Back in the Migration Settings screen click Save



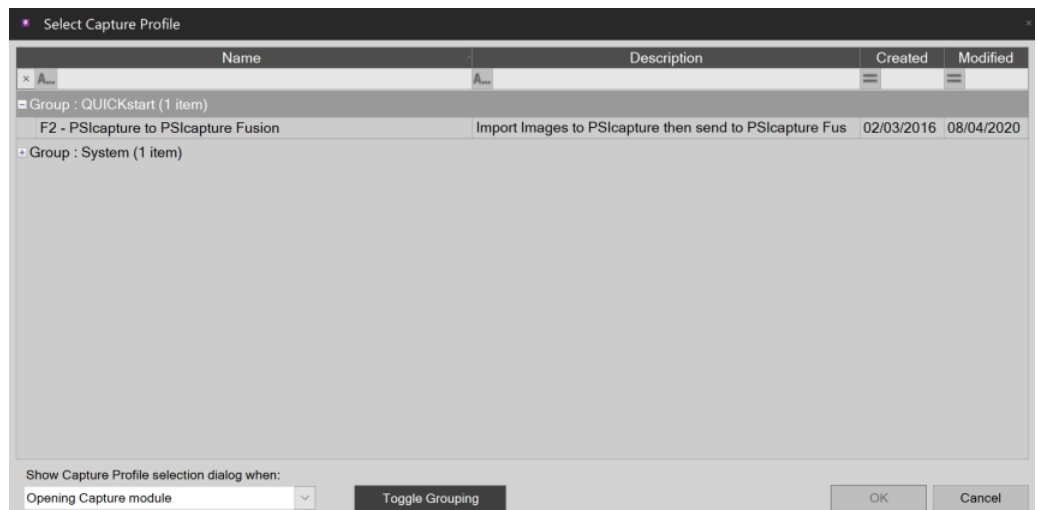
Save Capture Profile and Configuration back to the PSIScapture Home Screen.

Test Passing the Sample Images from PSIsapture to PSIsapture Fusion

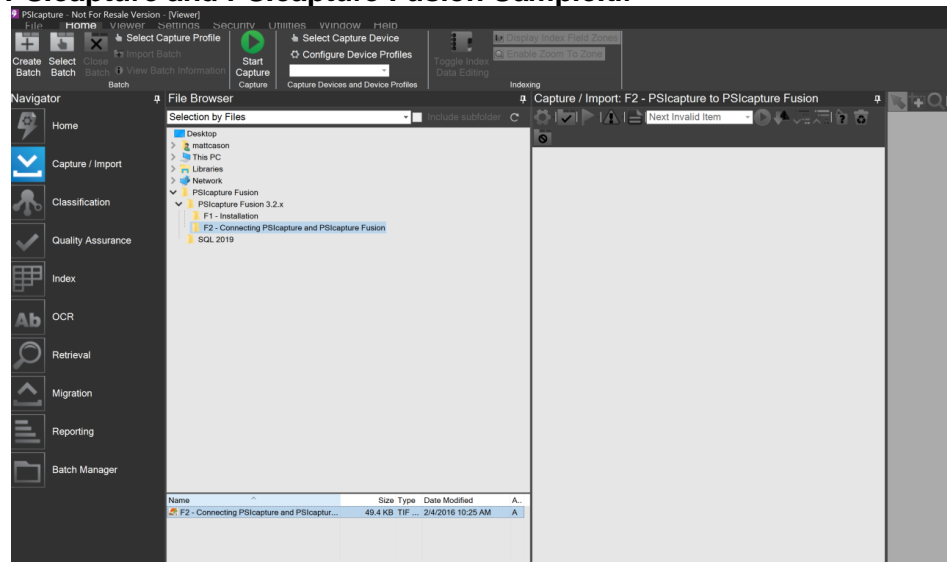
Open PSIsapture and select Capture/Import



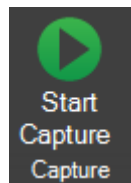
Select the Document Type **F2 – PSIsapture to PSIsapture Fusion** and click **OK**



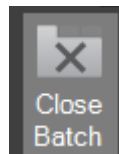
Browse to and Select the Sample Image File called **F2 – Connecting PSICapture and PSICapture Fusion Sample.tif**



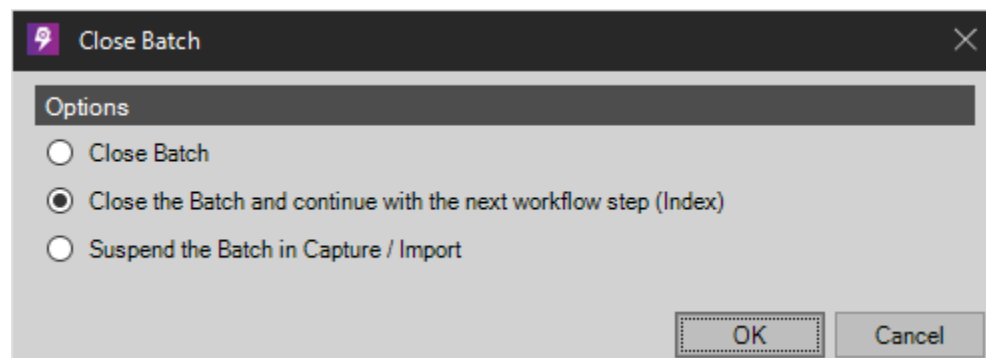
Click on the **Start Capture** button



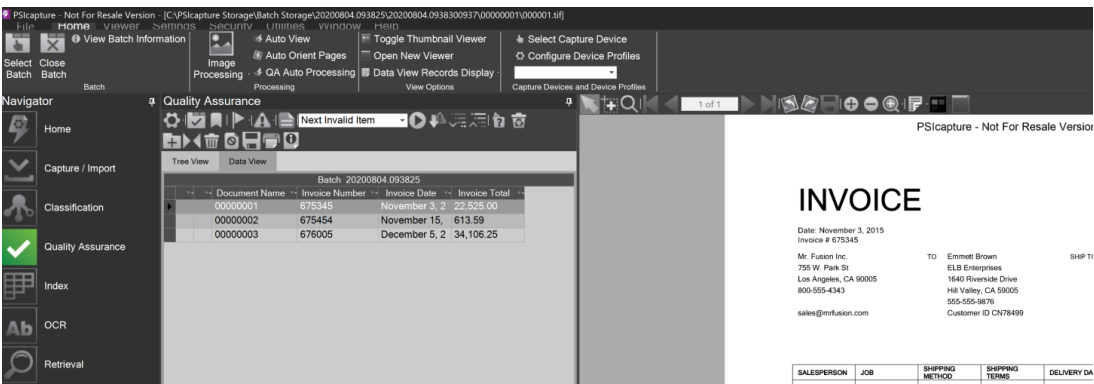
After the files are imported, click the **Close Batch** button



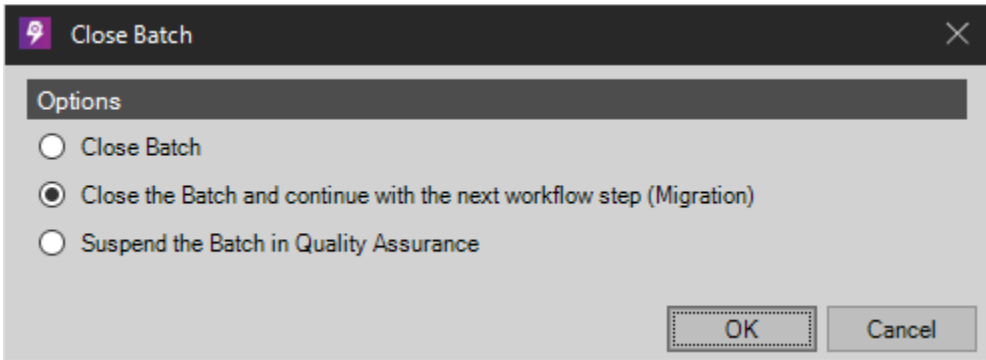
When the Close Batch dialogue appears click **OK** to continue to Index



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

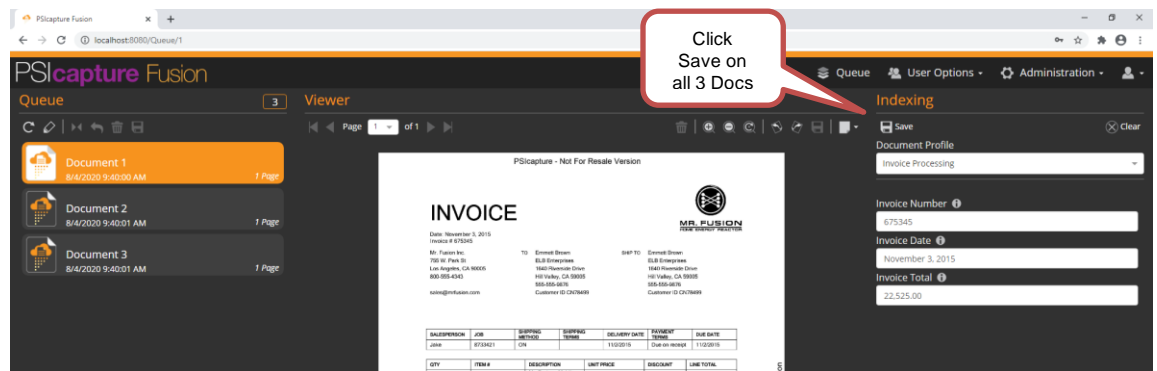


Click the **Close Batch** button to being Migration:



Once the Migration completes you will return to the PSICapture Home Screen.

Browse to your PSIdcapture Fusion site and login as the Administrator (Password: Admin-01)



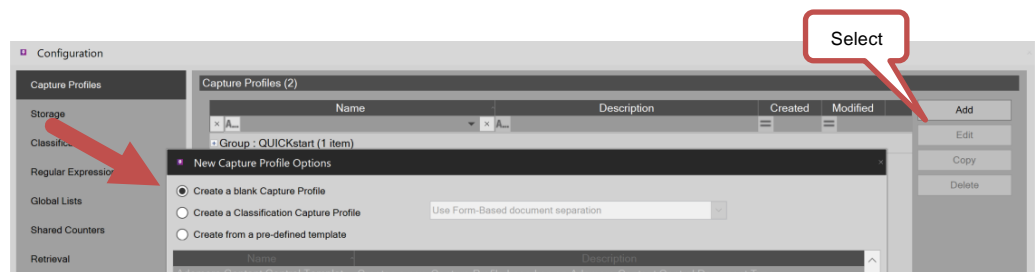
You should now have three Documents available in the Administrator's Queue.

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

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

Creating a PSIdcapture Capture Profile to Accept Batches from PSIdcapture Fusion

Return to PSIdcapture. 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 Configuration' window with the 'General Setup' tab selected. The left sidebar contains a navigation menu with options: Capture Profile, Auto Import, Document Records, Separation, Recognition, Indexing, Advanced Indexing, Image Processing, Workflow, and Summary. The main area is divided into sections: 'Identification, roles and security' with fields for Name (F2 - PSICapture Fusion to PSICapture), Group (QUICKstart), Description (Import batches from PSICapture Fusion then pass to Quality Assurance), and Allowed roles (All Users, Administrator); 'Batch type' with radio buttons for Local (selected) and Shared; 'Storage options' with a Storage Location dropdown set to 'Batch Storage' and a 'New Location' button; 'Batch naming' with radio buttons for Automatic (selected), Manual, and Custom, and a checkbox for 'When creating new batches, the batch name cannot be modified'; and 'Batch retention' with a dropdown for 'Keep Batch' and a checkbox for 'Retain retention date when re-opening Batch'. A red callout box points to the 'Batch Storage' dropdown with the text 'Confirm Storage Location'.

Select **Indexing** from the navigator

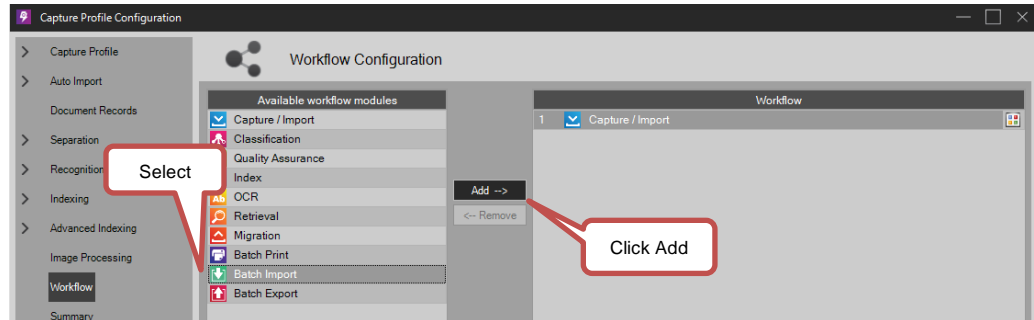
Use the **Add** button to enter the 3 index fields we have captured and reviewed in PSICapture Fusion

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

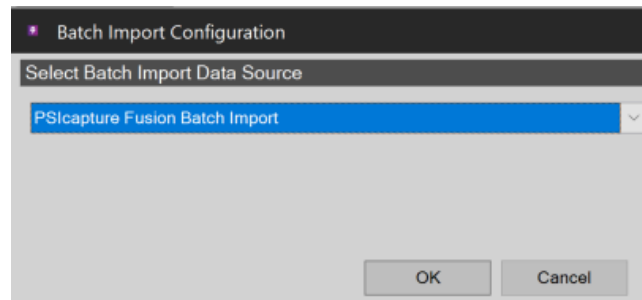
The screenshot shows the 'Capture Profile Configuration' window with the 'Document Index Fields' tab selected. The left sidebar is the same as the previous screenshot, but 'Indexing' is now selected. The main area shows a table of 'Document Index Fields' with columns 'Name' and 'DataType'. The table contains three rows: 'Invoice Number' (Text), 'Invoice Date' (Text), and 'Invoice Total' (Text). To the right of the table are buttons: Add, Insert, Delete, Move Up, and Move Down. Further right are tabs: General, Advanced, Barcodes, List, and Zone. The 'General' tab is active, showing 'Invoice Total' as the selected field. Below this is the 'Document Index Field Definition' section with fields for Default value, Input mask, Minimum length (0), Maximum length (255), Custom value, and Record Types (<Shared>). A 'Build Custom Value' button is also present.

Select **Workflow** from navigator

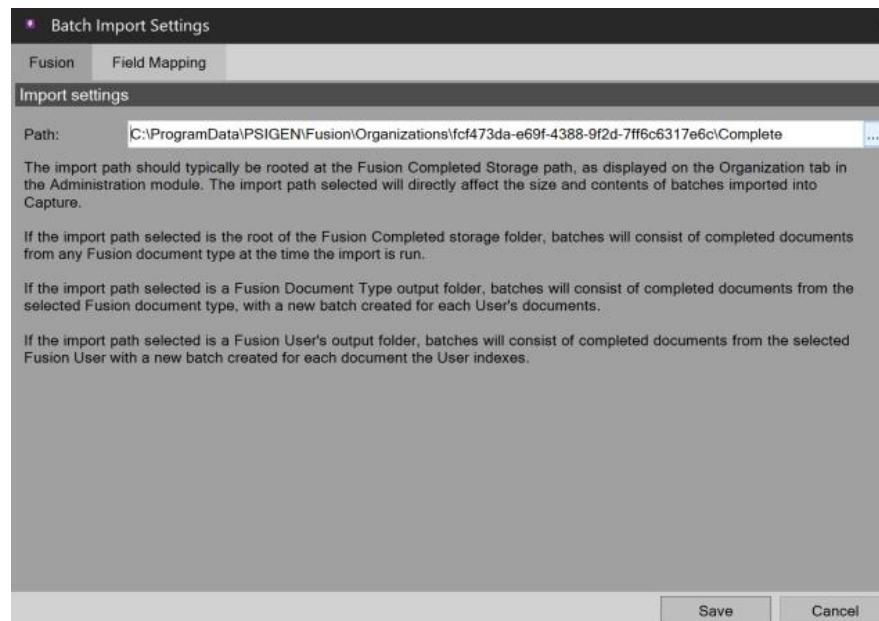
Select Batch Import from the Available Workflow Modules on the left and add it to the Workflow on the right.



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

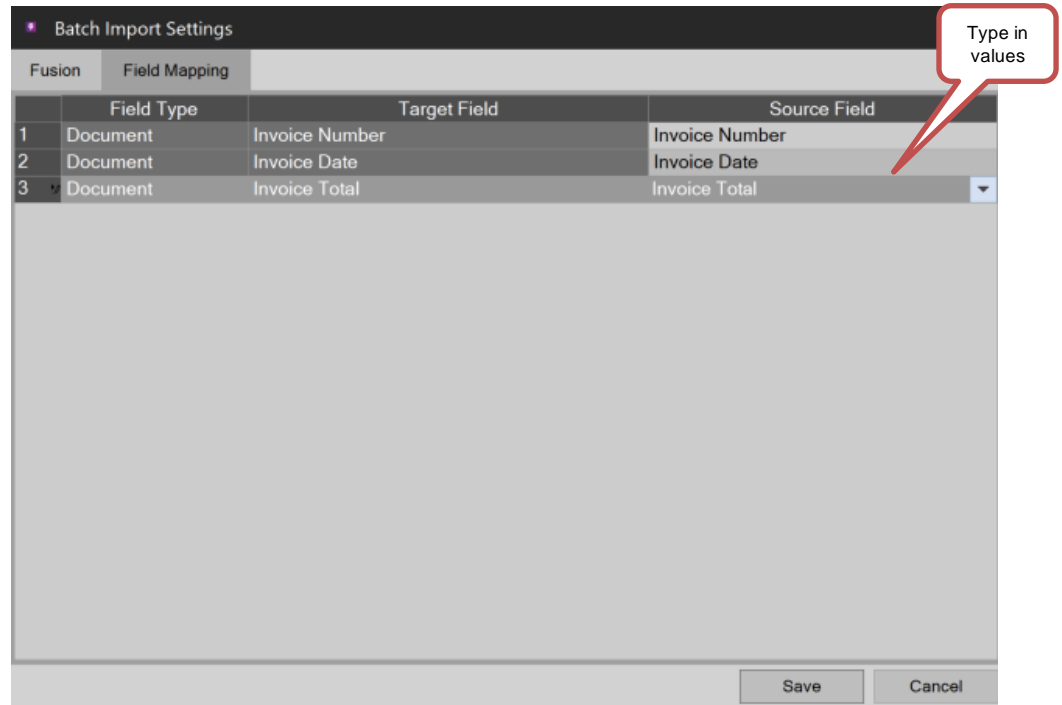


In the Batch Import Settings configuration, navigate to your Program Data\PSIGEN\Fusion\Organizations\<your org ID>\Complete path



Click on the **Field Mapping** tab

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



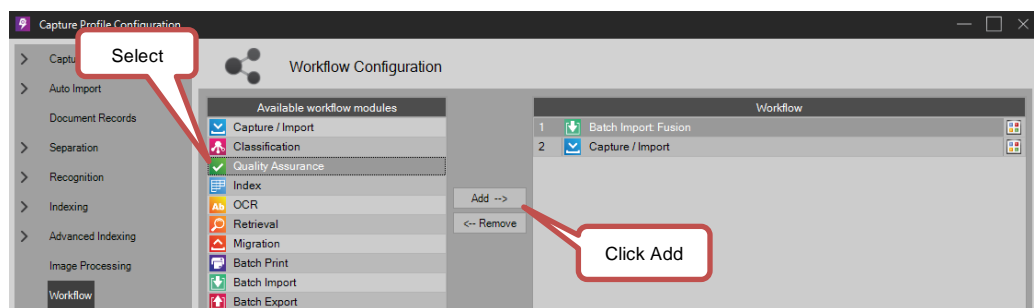
The screenshot shows the 'Batch Import Settings' window with the 'Field Mapping' tab selected. It contains a table with three columns: 'Field Type', 'Target Field', and 'Source Field'. There are three rows of data. A red callout bubble points to the 'Source Field' column with the text 'Type in values'.

	Field Type	Target Field	Source Field
1	Document	Invoice Number	Invoice Number
2	Document	Invoice Date	Invoice Date
3	Document	Invoice Total	Invoice Total

Buttons: Save, Cancel

Click **Save**

Next we need to add in a **Quality Assurance** module into our Workflow.



The screenshot shows the 'Capture Profile Configuration' window with the 'Workflow Configuration' tab selected. It features a list of 'Available workflow modules' on the left and a 'Workflow' list on the right. A red callout bubble points to the 'Quality Assurance' module in the available list with the text 'Select'. Another red callout bubble points to the 'Add -->' button with the text 'Click Add'.

Available workflow modules:

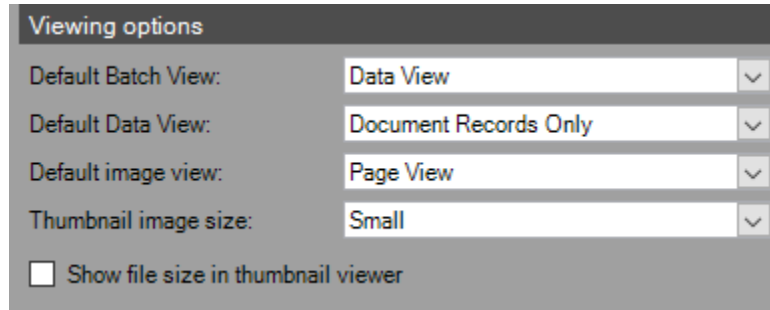
- Capture / Import
- Classification
- Quality Assurance
- Index
- OCR
- Retrieval
- Migration
- Batch Print
- Batch Import
- Batch Export

Workflow:

- Batch Import - Fusion
- Capture / Import

Buttons: Add -->, <-- Remove

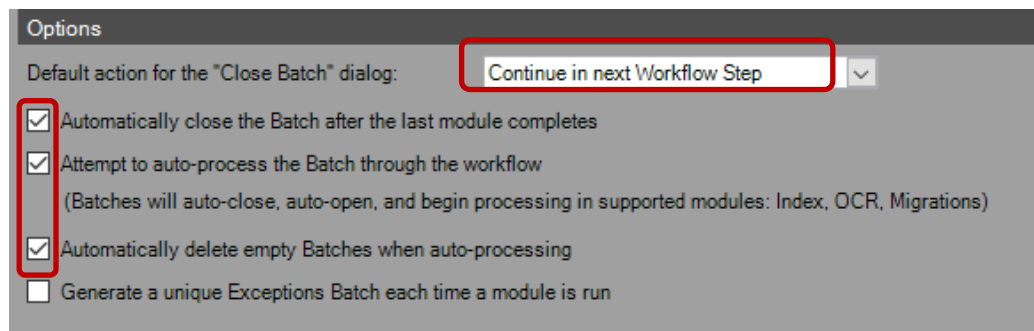
We want to set the Default Batch View to be **Data View** and then click **Save**.



The 'Viewing options' dialog box contains four dropdown menus and one checkbox. The first dropdown, 'Default Batch View', is set to 'Data View'. The second, 'Default Data View', is set to 'Document Records Only'. The third, 'Default image view', is set to 'Page View'. The fourth, 'Thumbnail image size', is set to 'Small'. At the bottom, there is an unchecked checkbox labeled 'Show file size in thumbnail viewer'.

Viewing options	
Default Batch View:	Data View
Default Data View:	Document Records Only
Default image view:	Page View
Thumbnail image size:	Small
<input type="checkbox"/> 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**.



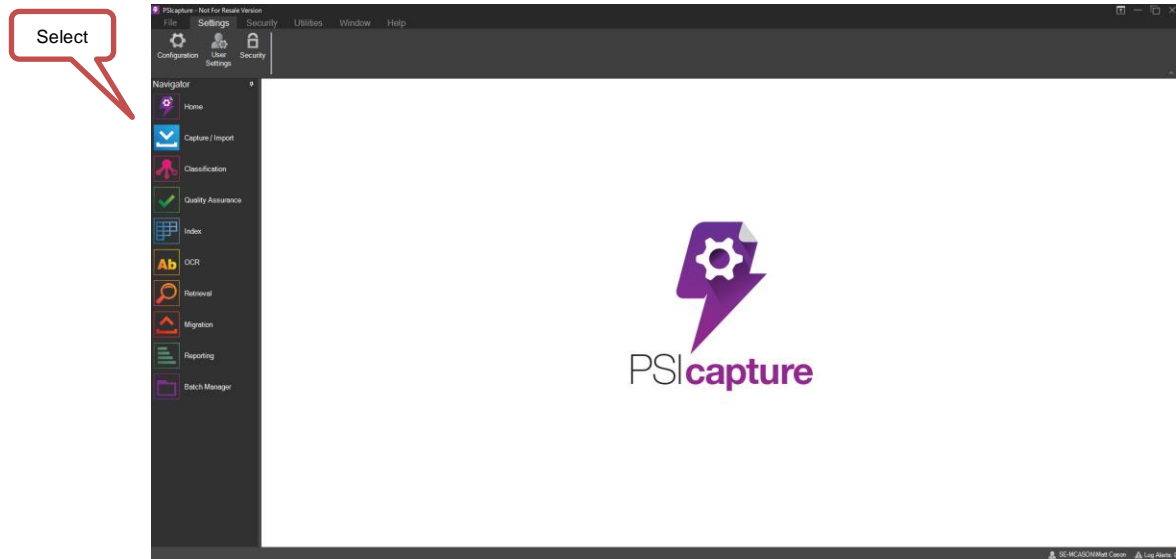
The 'Options' dialog box has a dropdown menu for 'Default action for the "Close Batch" dialog:' set to 'Continue in next Workflow Step'. Below this are four checkboxes. The first three are checked and highlighted with a red box: 'Automatically close the Batch after the last module completes', 'Attempt to auto-process the Batch through the workflow' (with a sub-note '(Batches will auto-close, auto-open, and begin processing in supported modules: Index, OCR, Migrations)'), and 'Automatically delete empty Batches when auto-processing'. The fourth checkbox, 'Generate a unique Exceptions Batch each time a module is run', is unchecked.

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

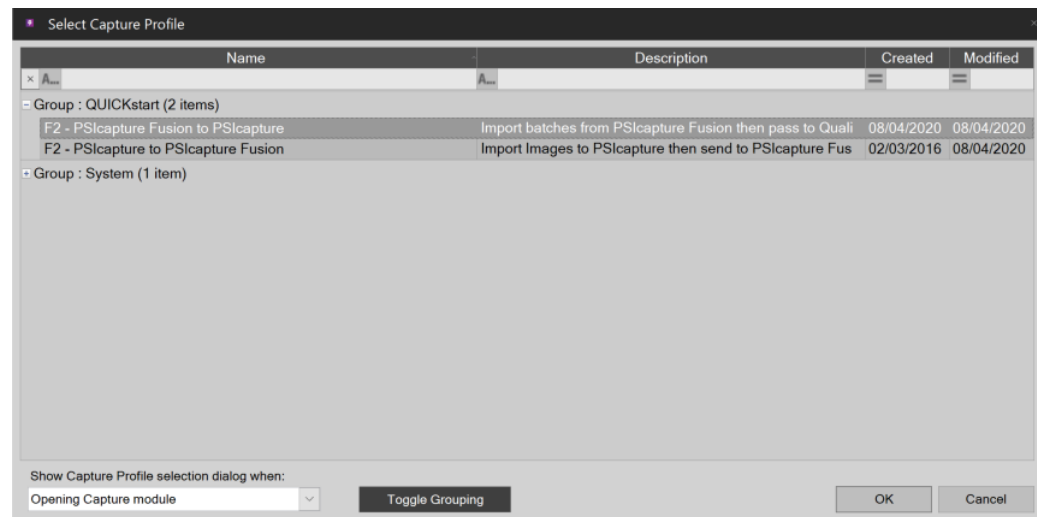
Save back to your home screen.

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

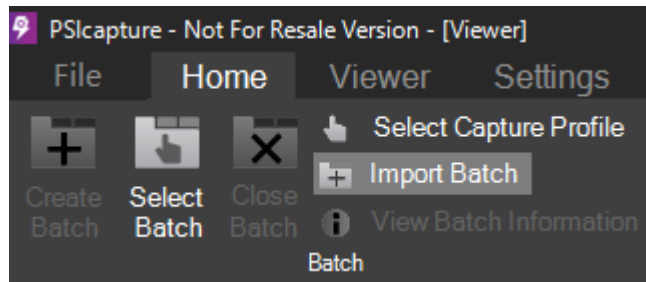
From the Home Screen select Capture/Import



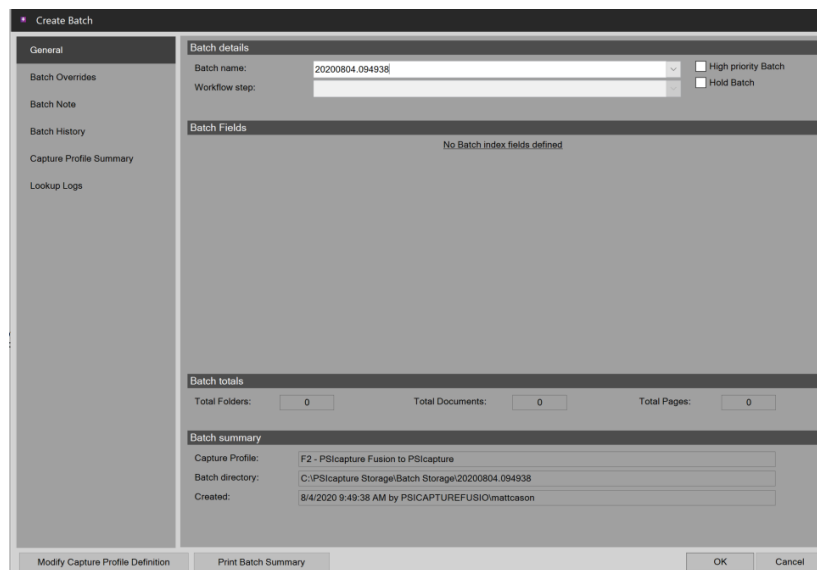
Select **F2 – PSIs capture Fusion to PSIs capture** and click **OK**



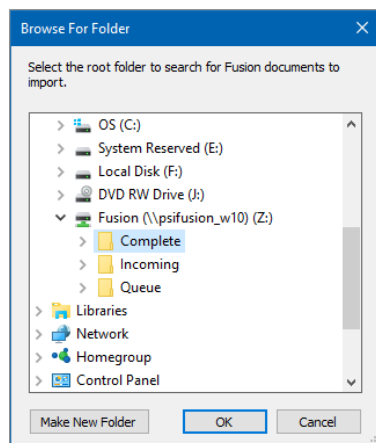
From the Capture/Import window click on the **Import Batch** Icon.



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

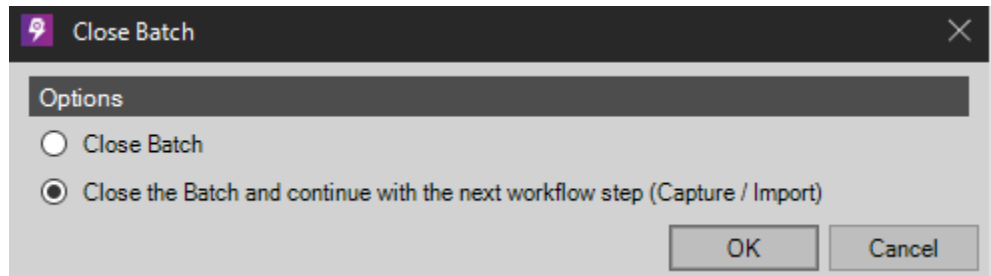


From the **Browse For Folder** screen, verify your PSICapture Fusion **Complete** folder is selected.

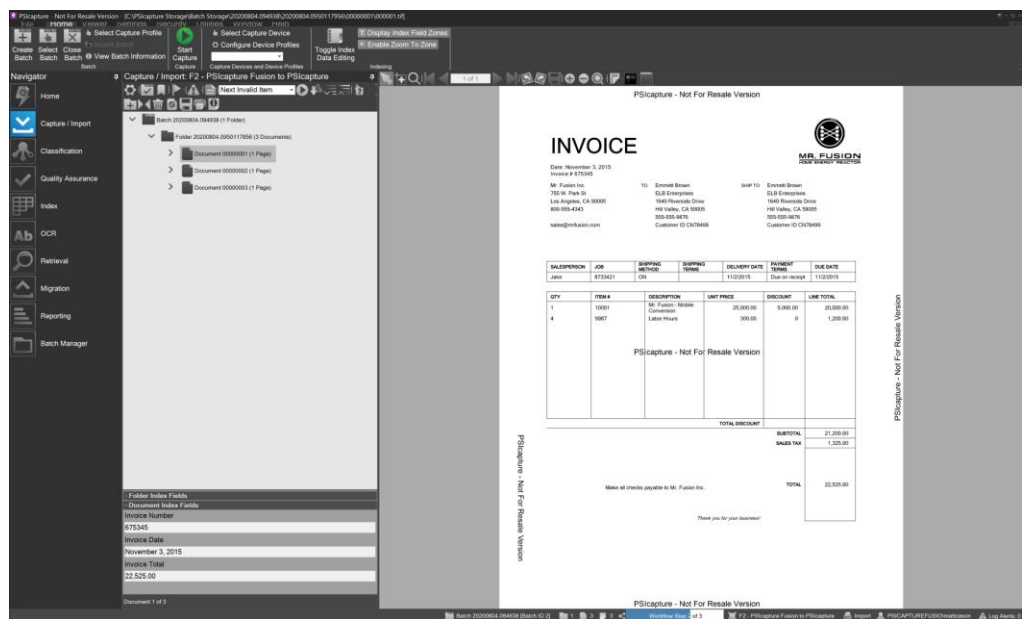


Click **OK**

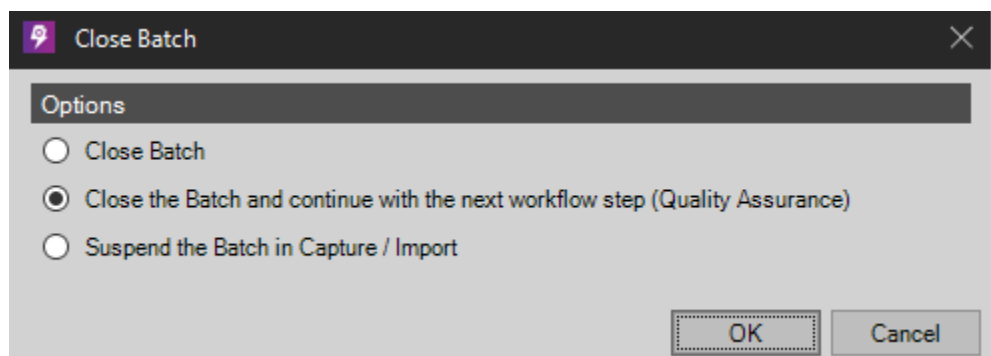
Click **OK** on the Close Batch message to Import the batch.



The 3 documents saved in PSIsapture 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

Quality Assurance

Next Invalid Item

Tree View

Data View

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

PSIsapture - Not For Resale Version

INVOICE

Date: November 3, 2015
Invoice # 675345

Mr. Fusion Inc.
755 W. Park St
Los Angeles, CA 90005
800-555-4343
sales@mrifusion.com

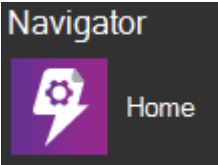
TO: Emmett Brown
ELB Enterprises
1640 Riverside Drive
Hill Valley, CA 95005
555-555-9876
Customer ID CN78499

SHIP TO: Emmett Brown
ELB Enterprises
1640 Riverside Drive
Hill Valley, CA 95005
555-555-9876
Customer ID CN78499

SALESPERSON	JOB	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE	PAYMENT TERMS	DUE DATE
Jake	6733421	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