

Kofax PSIcapture Mailroom Installation Guide

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PSIcapture Mailroom Environment Configuration

Establish On-Premises Mailroom Environment

Prerequisites - Windows Features

- **IIS 7+** (including all Windows features)
- .NET Framework 4.6 (includes .NET 2.0 and 3.0)
- .NET Framework 4.7 Advanced Services
- Internet Information Services > World Wide Web Services > Application Development Features >
 .NET Extensibility 3.5 & 4.7+ & ASP .NET 3.5 & 4.7+
- Internet Information Services > World Wide Web Services
 > Common HTTP Features > Static Content
- WCF Services > HTTP Activation
- On Windows Server 20XX OS, these features should be added through Server Management Console.

Prerequisites - Applications

Ensure your computer meets the minimum system requirements and you've downloaded or installed:

- Microsoft SQL Express 2017+ (x86 or x64)
- Microsoft SQL 2017 Management Studio Express 17.9+
- Mailroom Service.Setup.1.0.0.exe
- PSIcapture Mailroom.Setup.3.3.9.0.exe

Note: While PSIcapture is not required for installation, PSIcapture is required to migrate to Mailroom.

Unblock Installers and Run as Administrator

Web Server (IIS) (12 of 43 installed) Web Server (11 of 34 installed) Common HTTP Features (4 of 6 installed) Health and Diagnostics (1 of 6 installed) Performance (1 of 2 installed) Security (1 of 9 installed) Application Development (4 of 11 installed) .NET Extensibility 3.5 ✓ .NET Extensibility 4.5 (Installed) Application Initialization ASP ASP.NET 3.5 ASP.NET 4.5 (Installed CGI ✓ ISAPI Extensions (Installed) ✓ ISAPI Filters (Installed) Server Side Includes WebSocket Protocol FTP Server Management Tools (1 of 7 installed) Windows Deployment Services Windows Server Essentials Experience Windows Server Update Services .NET Framework 3.5 Features (1 of 3 installed) NET Framework 4.5 Features (4 of 7 installed) ✓ .NET Framework 4.5 (Installed) ASP.NET 4.5 (Installed) ▲ ■ WCF Services (2 of 5 installed) HTTP Activation (Install Message Queuing (MSMQ) Activation Named Pipe Activation TCP Activation TCP Port Sharing (Installed)

Ensure you unblock all installers downloaded via Properties > Unblock. Then, right-click and "Run as Administrator" when completing the following installation procedure.

File Action View Help	🔗 New Inbound Rule Wizard	PNew Inbound Rule Wizard						
🗢 🏟 💋 🖬	Protocol and Ports							
Windows Defender Firewall with	Specify the protocols and ports to	which this rule applies.						
Outbound Rules	Steps:							
Connection Security Rules	Rule Type	Rule Type Does this rule apply to TCP or UDP?						
> 懸 Monitoring	Protocol and Ports O TCP							
	 Action 	ction O UDP						
	 Profile 							
	Name	Does this rule apply to all local po	its or specific local ports?					
		All local ports						
		Specific local ports:	8993, 8994, 11000, 1433					

Port Exceptions:

<u>PSIcapture Mailroom uses the following ports:</u> (Add Inbound and Outbound entries)

TCP/IP: 47232-47233 (Service Ports) 8080 (Or custom port in IIS)

PSIcapture Mailroom Service Installation

<u>Click this link to refer to the PSIcapture Mailroom</u> <u>System Requirements page for unsupported plat</u><u>forms and important installation notes.</u>

Supported Platforms

- Windows Server 2012 or later
- Windows 10
- SQL Standard 2012 or later
- SQL Enterprise 2012 or later
- SQL Express 2012 or later

Additional Notes

- Microsoft Internet Information Services (IIS) will not serve a web application to more than 10 concurrent users when running on a non-server operating system. PSIcapture Mailroom will only be supported on non-server operating systems for demonstration purposes.
- PSIcapture Mailroom was previously PSIcapture Fusion. For the purposes of this guide, the two are identical.

Mailroom Service Setup Installation



- If UAC is enabled, you may need to enter Administrator Credentials to proceed.
- If you want to deploy the Mailroom Service and Web App on the same machine, be sure to install "Mailroom Service.Setup.1.0.0.0.exe" and "PSIcapture Mailroom.Setup.3.3.9.0.exe" on the same machine. In this case, granting permission to the Fusion Folder (next page) is not required.
- There are two separate installation files:
 - Mailroom Service.Setup.1.0.0.0.exe
 - PSIcapture Mailroom.Setup.3.3.9.0.exe

1	You must restart your system for the configuration changes made to Fusion Service to take effect. Click "Yes" to restart now or "No" if you plan to manually restart later.
	Yes No

- 1. Run "Mailroom Service.Setup.exe" on the machine hosting the main server, and the screenshot to the left will appear.
- 2. Click "I agree to the License terms and conditions" check box and Install.
- 3. Click Yes to proceed. (cont. on pg. 5)



PSIcapture Mailroom Service Permissions

4. After successful installation verify "Mailroom Service" folder at following path:

C:\Program Files (x86)\PSIGEN\Fusion Services

- 5. Go to Services and stop the "Mailroom Services". Restart when the following is complete.
- 6. Create Users "FusionAdmin" and "FusionFileServer" via AD or otherwise.
- 7. Grant these users Read/Write Access to Fusion folder "C:\ProgramData\PSIGEN\Fusion".

Name	^	Date modified	Туре	Si Type a name and then click Add, or c	lick the arrow to find someone.
Fusion Fusion S	Open Open in new window Pin to Quick access	2:50 PM 2:40 PM	File folder File folder	Name	Add Permission Level
	Give access to Restore previous versions Include in library Pin to Start Send to	> Arrow Arro	ove access ific people	Administrators FusionAdmin FusionFileServer FusionFileServer	Owner Read/Write ▼ Read/Write ▼ Read/Write ▼ Read/Write ▼
	Cut Copy Create shortcut Delete			I'm having trouble sharing	

- Additionally, add system profiles "IIS AppPool\Mailroom3.3.9", "IIS AppPool\PSIcapture Mailroom
 - [Deployment Name] e.g. "PSIcapture Mailroom Deployment1", "NETWORK", and "SYSTEM", and
 grant the same Read-Write permissions granted above.
- 9. Now, right-click on the same Fusion folder in ProgramData and click "Share". A dialog window will appear displaying a shared path. Make sure to copy this path, as it will be used in later steps.

Create SQL Database to Link to PSIcapture Mailroom

Object Explorer	× # ×	New Database					- 0	×
TECH-JFERNAND	EZ\PSISAFE (SQL Server 14.0.2027 - TECH	Select a page General	🖵 Script 💌 😮	Help				
Image: Constraint of the second s	New Database Attach Restore Files and Filegroups Deploy Data-tie: Application Import Data-tie: Application Start PowerShell	∲ Options ∲ Flegroups	Database name: Owner: Use fulkext i Database files: Logical Name PSicapture PSicapture	File Type ROWS LOG	PSIcapture aa Filegroup PRIMARY Not Applicable	Initial Size (MB)	Autogrowth / Maxsize By 64 MB, Unimited By 64 MB, Unimited	
lest lest lest security Server Ob, Replication PolyBase Management XEvent Profile	n Refresh	Connection Server TECH-VFERNANDEZ:PSISAFE Connection TECH-IFERNANDEZ:Joef Feman ₩ Ven.connection.posenties	e.					
		Progress Prady Ready	<		_	Add	Remove	>
							OK Ca	ncel

- Create a New Database via SSMS (avoid using spaces in the name to prevent issues).
- Set the Database Owner to sa and ensure you have the login credentials for the sa account for licensing.
- Default settings for the database, including recovery model and autogrowth sizes can remain unchanged.
- Make sure the installation computer can connect to the SQL Server location without licensing issues.

PSIcapture Mailroom Web App Installation

Install Website and Application Pool

- 1. Run PSICaptureMailroom.Setup.3.x.x.exe as an Administrator, and the screen pictured to the right will appear.
- 2. Check the "I agree to the License terms and conditions" checkbox and click Install.
- 3. Installation should complete automatically. Contact Support should you encounter any errors during this installation process.
- 4. Once complete, the website files and application pool of IIS should be installed. To verify a successful installation along with corresponding permissions and configuration settings, see **Configure IIS and Verify Settings** on page 7.
- 5. Access the Windows Start menu and type in "Deployment Manager".
- 6. Open the Deployment Manager Application to begin the licensing process, and the following screen will appear:

🔀 Deployment Mode		×
Please select Deployment Mode Same Server C Load Balance Server	er	
Deployment Path:		
UNC UserName:		
UNC Password:		
	Ok	





- If you are licensing on the same machine which hosts the website and application pool files your just installed, select "Same Server". If installing a Load Balance Server, see the "Load Balance" section or separate guide for more information.
- Deployment Path Set this to the UNC path for the deployment folder, in either IPv4 Address or IPv6 Machine Name format, e.g. 10.1.1.12\Fusion or DOC-PC7\Fusion. The default Mailroom Deployment folder is: C:\ProgramData\PSIGEN\Fusion\Deployments.
- UNC UserName and Password: Set these credentials to a user who has been granted full read/write access to the folder, as specified in the previous step or configured in Active Directory by an IT Administrator, who has been granted access to the folder.

PSIcapture Mailroom Licensing

Deployment Manager - Licensing Mailroom to a SQL Database

PSIcapture Mailroom - D	eployment Manager	- 🗆 ×
PCM_Test1	Deployment Name 🕕	
	PCM_Test1	
	Deployment Path 🕕	
	C:\ProgramData\PSIGEN\Fusion\Deployments\PCM_	Test1
	File Server Path 🕕	
	C:\ProgramData\PSIGEN\Fusion\Deployments\PCM_	Test1\Organizations\PCM_Test1
	UNC UserName 🕕	UNC Password 🚯
		•••••
	SQL Server Connection String 🕕	
	Server= \PSISAFE; Database=PCM_	Test1; User Id=sa; Password=
	Product Key () PSEFNE-AXAXAJBAAMA Licensed Users: 5]
	Maintenance Expiration: 4/14/2023	Days Remaining: 584
		Edit 🚺

Open the Deployment Manager and click the "Plus" (+) icon in the bottom-left to create a new Deployment.

- **Deployment Name:** An appropriate name for this Mailroom deployment.
- **Deployment Path:** This ProgramData path should be accessible to the PSI-capture Installation as well as having adequate storage for documents.
- File Server Path Within the Mailroom ("Fusion") root folder is an "Organizations" folder, which is unique to this Deployment.
- SQL Server Connection String: This string contains all that is necessary to link Mailroom to SQL.

Example SQL Server Connection String:

Server=[PCNAME]\[SQLInstance]; Database=[SQL DB NAME]; User Id=sa; Password=Admin-01

- Once the SQL Server Connection String is complete, click the "Test" button and verify the connection. Ensure the SQL Browser port UDP 1434 is open for this operation.
- 2. Once the connection is successful, enter the License Information via the License Button. Fields highlighted in Red are required.

Note: If you have previously used this Mailroom license for another installation, you will need to specify a new SQL DB and contact PSIGEN Support for a License Reset.

- 3. Once complete, click "Submit" to complete the internet-based registration process, or check the box for "Generate Offline Request" license offline.
- Click "Save" back at the Deployment Manager screen to complete the licensing process.

Liconco Degistrati	lon		
License Registrati	lon		×
Please complete the and support services third party.	following registration form. End user info . All information collected will only be us <u>View our Priv</u>	ormation is collecte sed for internal pur <u>acy Policy</u>	ed to improve our license management rposes, and will not be shared with any
General Information	1		
Product Key			
User Name		Phone	
Company Name		Email	
Reseller Name		Website	
Address			
Address 1		State/Province	
Address 2		Zip/Postal Code	
City		Country	
Offline License [Generate Offline Request	Email License To:	
			Submit Cancel

PSIcapture Mailroom Permissions Verification

Configure IIS and Verify Settings

Open IIS (Internet Information Services) and check the default Application Pool (Mailroom3.3.9) and Website (App) set by the PSIcapture Mailroom installation process.

- Under "Basic Settings" verify the credentials used for the site are valid using the "Test Settings" button, and change credentials if necessary via "Connect As..."
- Keep in mind you may need to add Read/Write Application Pool permissions ("IIS AppPool\Mailroom3.3.9" and IIS AppPool\PSIcapture Mailroom - [Deployment Name]) to the Deployment Location, the Installation Location, and the associated Registry Entries in a restricted environment.

💐 Internet Information Services (IIS) Manager						
← → ● TECH-JFERNANDEZ → Sites	 PSIcapture N 	Aailroom - Ma	ailroom1 🕨			
File View Help						
Connections	PSI	capture	Mailroom	ı - Mailro	om1 Hon	ne
IECH-JFERNANDEZ (IECH-JFERNANDEZ) Jc Application Pools	Filter:		• 👎 Go 🕞	Show All	Group by: Are	a
 ✓ -10 Sites > 0 App > 0 Default Web Site → PSIcapture Mailroom - Mailroom1 	ASP.NET	.NET Compilation	.NET Error Pages	.NET Globalization	.NET Profile	.NET Roles
	Machine Key	Pages and Controls	Providers	Session State	SMTP E-mail	
	ASP	Authentic	2 Compression	Default Document	Directory Browsing	A 404 Error Pages
	MIME Types	Modules	Output Caching	Sequest Filtering	SSL Settings	
	Managemer	nt				
	Configurat					

Internet Information Services (IIS) Manager				
← →	ication Pools			
File View Help				
The view help				
Connections	Application Pools This page lets you view and manage the list of a one or more applications, and provide isolation Filter:	among diff ow All Gr Status Started Started Started Started Started	pools on the ser ferent applicatic oup by: No Gr .NET CLR V v2.0 v2.0 v4.0 v4.0	ver. Application ouping Managed Pipe Integrated Classic Integrated Classic
	AffinityAPI CabinetOpenApi CabinetOpenApi Classic .NET AppPool DefaultAppPool Mailroom3.3.9	Started Started Started Started Started	v4.0 v4.0 v2.0 v4.0 v4.0	Integrated Integrated Classic Integrated Integrated
	PSicapture Mailroom - Mailroom1	Started	v4.0	Integrated

- Binding PSIcapture Mailroom to a 443 Port and corresponding SSL Certificate allows the site to be converted to HTTPS.
- A detailed, technical log of any actions performed by the installer can be found at C:\ProgramData\PSIGEN\ Fusion\Setup\InstallLog.txt. This log also includes details on any errors that may have occurred.
- Once configured, you should be able to **Browse** to the Site and pull up the default login screen in the next step.
- If you encounter errors displaying the webpage, ensure that your environment does not prevent browsing to the local localhost:8080 site (default) or that the associated ports are not blocked in any way by firewalls or AV modules.

PSIcapture Mailroom Initial Login

Log in as Administrator and Configure Deployment

Kofax PSIcapture∘ Mailroom		KOEAN
Planoon		NOFAA
Username		
Password		
	Login	
© 2021 - Kofax, Inc.		v 3.3.9.0

The Default login for PSIcapture Mailroom is:

Username: Administrator Password: Admin-01

Once logged in, users can be set up according to a standard profile, or imported via Windows & LDAP.

By default, the Administrator account cannot be disabled, but the password can be changed. If you forget the Administrator password for any reason and cannot log in with any other accounts, contact Support for assistance.

The "Contact Support" link for users can be customized with a unique link for your business needs.

Initial Configuration

Under Administration > Organization > General Settings:

Set the Name of the Organization and the Storage Path for all the Deployment Files.

Specify Document Queue Options according to your Company's workflow needs. For more information, visit our Wiki at the link below.

Mailroom Administration				
Menu	Organization > General Settings			
Organization				
ș≘ General Settings				
Mail Settings	General			
	Name			
📃 Mail Spool	Kofax Mailroom			
E Logs	Storage path			
	C:\ProgramData\PSIGEN\Fusion\Organizations\Kofax Mailroom			

By default, Teams are disabled. Click the "Enable Teams" checkbox and be sure to "Save" your settings when complete via the button in the upper-right.

Visit our support portal for more information on configuring PSIcapture Mailroom.

This completes the PSIcapture Mailroom Installation Guide.