Kofax PSIcapture Mailroom
Installation Guide

Version: 3.3.9

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KOFAX

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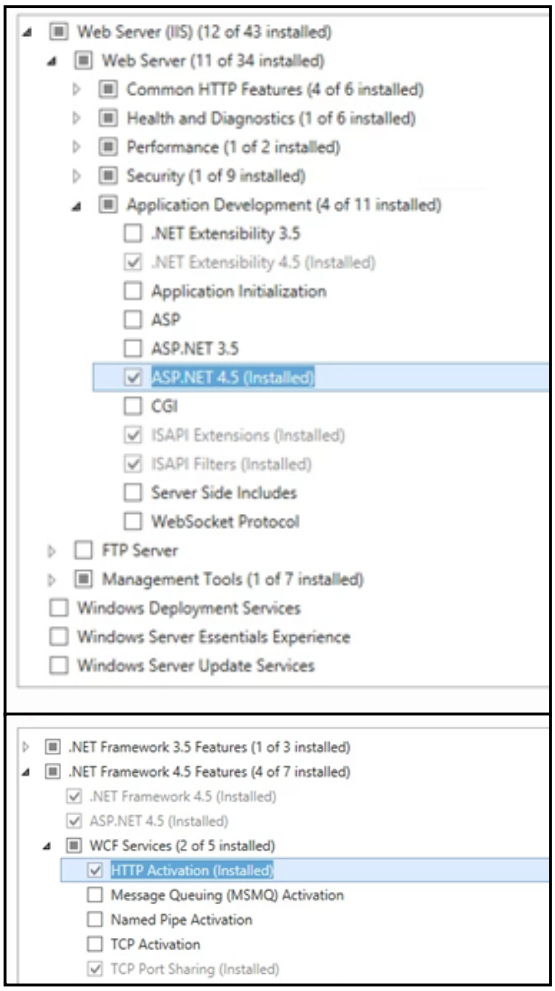
PSIcapture Mailroom Environment Configuration

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

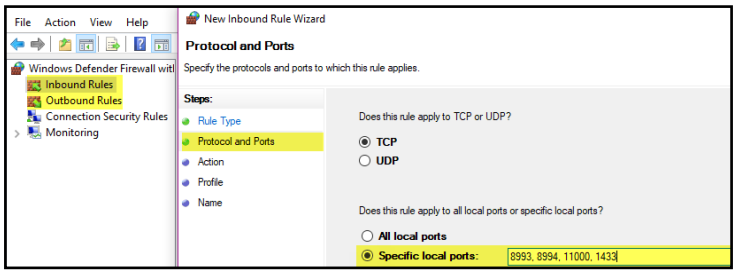
Ensure your computer meets the minimum system requirements and you've downloaded or installed:

- **Microsoft SQL Express 2017+ (x86 or x64)**
- **Microsoft SQL 2017 Management Studio Express 17.9+**
- **Mailroom Service.Setup.1.0.0.0.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

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



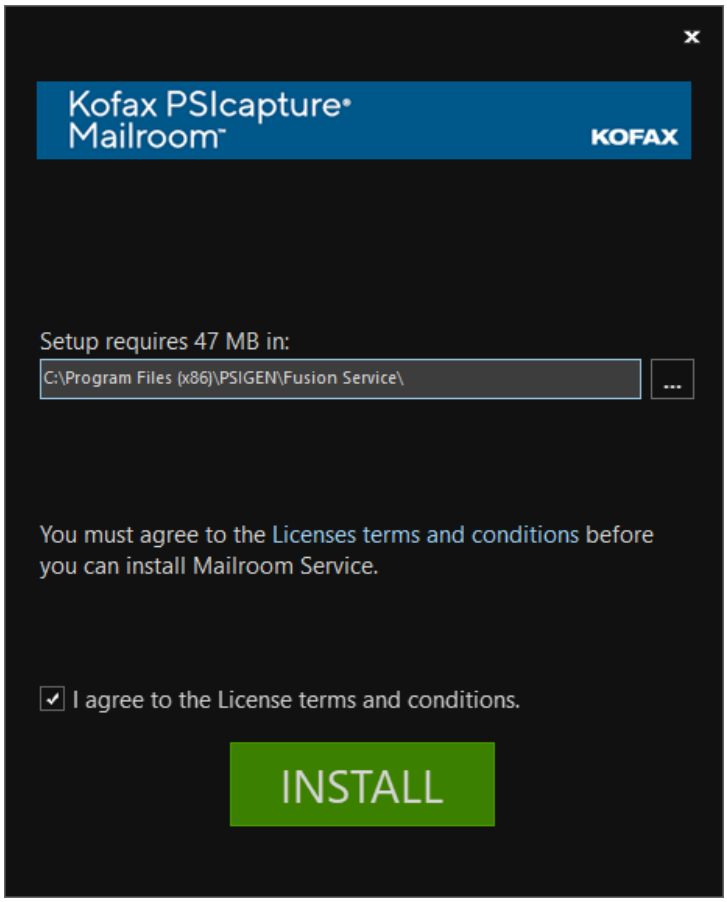
Port Exceptions:

PSIcapture Mailroom uses the following ports:
(Add Inbound and Outbound entries)

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

PSIcapture Mailroom Service Installation

Click this link to refer to the PSIcapture Mailroom System Requirements page for unsupported platforms and important installation notes.



Supported Platforms

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

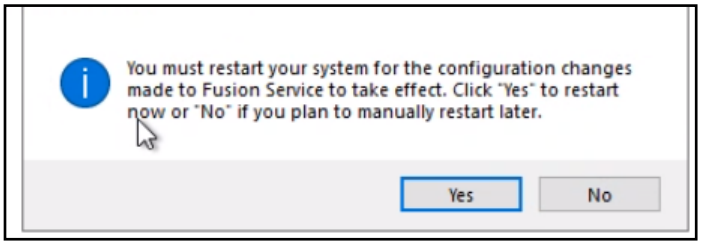
Additional Notes

- 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

Before proceeding, be sure to review these important details:

- 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



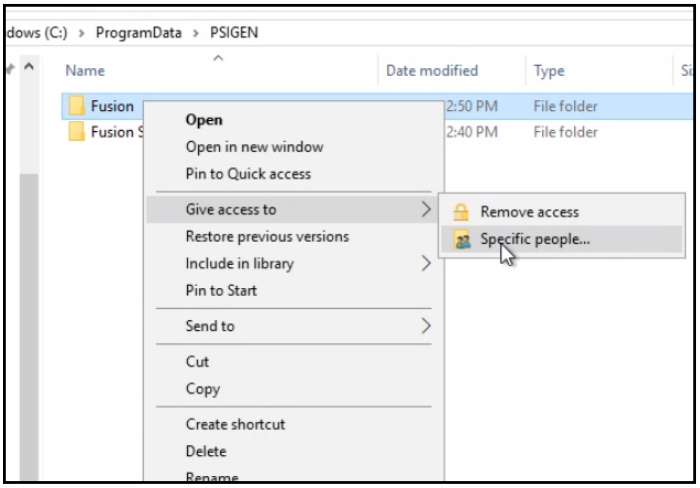
1. Run "Mailroom Service.Setup.exe" on the machine hosting the main server, and the screenshot to the left will appear.
2. Click "I agree to the License terms and conditions" check box and Install.
3. Click Yes to proceed. (*cont. on pg. 5)*

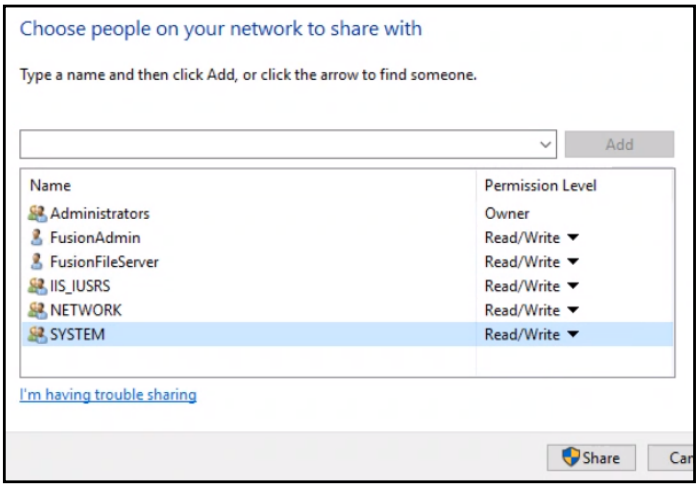
PSIcapture Mailroom Service Permissions

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

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

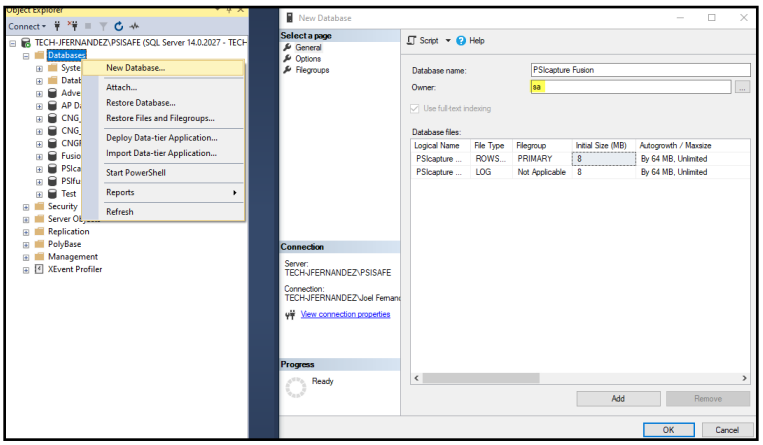
5. Go to Services and stop the “Mailroom Services”. Restart when the following is complete.
6. Create Users “FusionAdmin” and “FusionFileServer” via AD or otherwise.
7. Grant these users Read/Write Access to Fusion folder “C:\ProgramData\PSIGEN\Fusion”.





8. 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

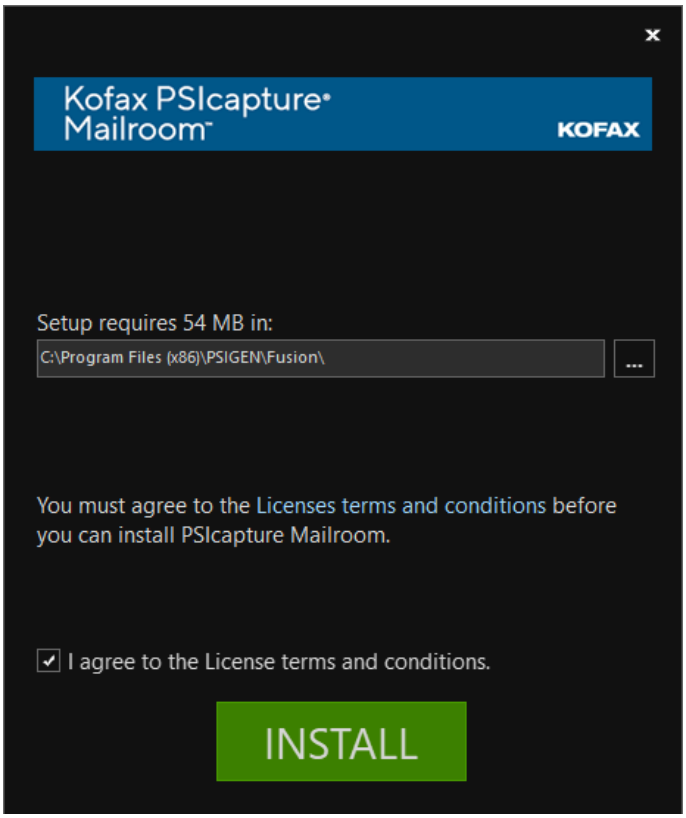


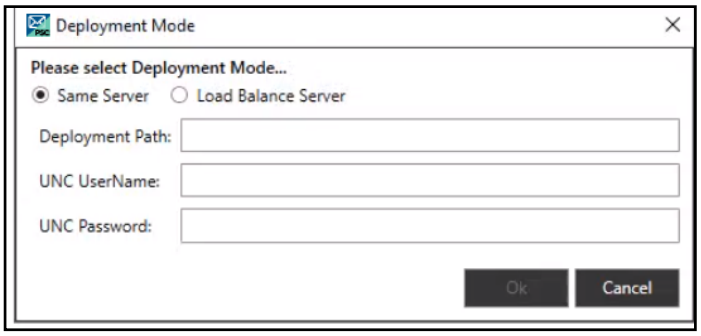
- Create a New Database via SSMS (avoid using spaces in the name to prevent issues).
- Set the Database Owner to sa and ensure you have the login credentials for the sa account for licensing.
- Default settings for the database, including recovery model and autogrowth sizes can remain unchanged.
- Make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

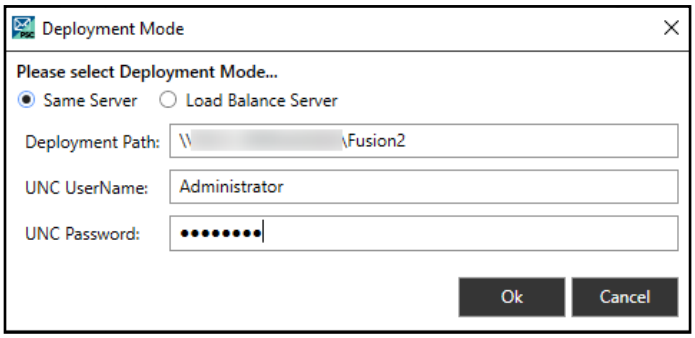
PSIcapture Mailroom Web App Installation

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:



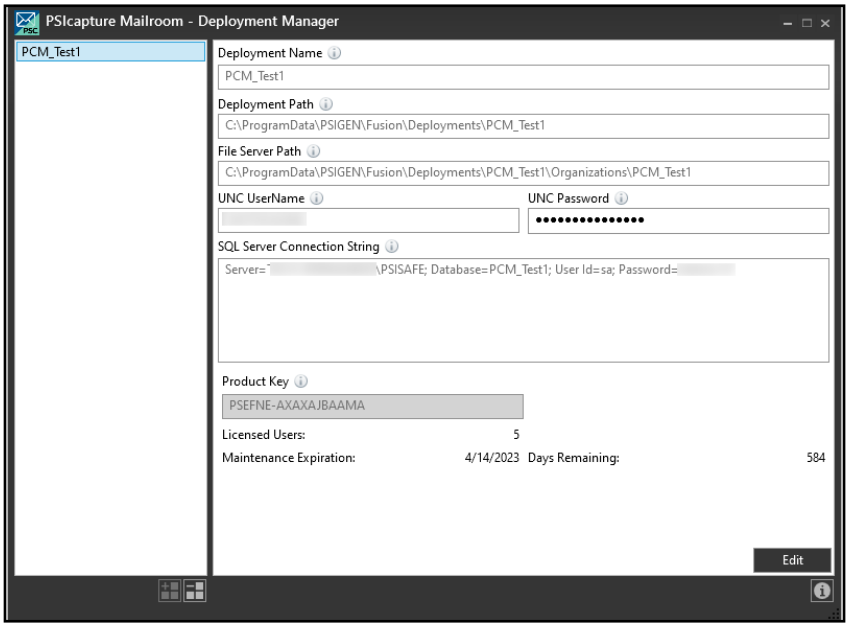




7. If you are licensing on the same machine which hosts the website and application pool files your just installed, select "**Same Server**". If installing a Load Balance Server, see the "Load Balance" section or separate guide for more information.
8. Deployment Path - Set this to the UNC path for the 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.**
9. 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



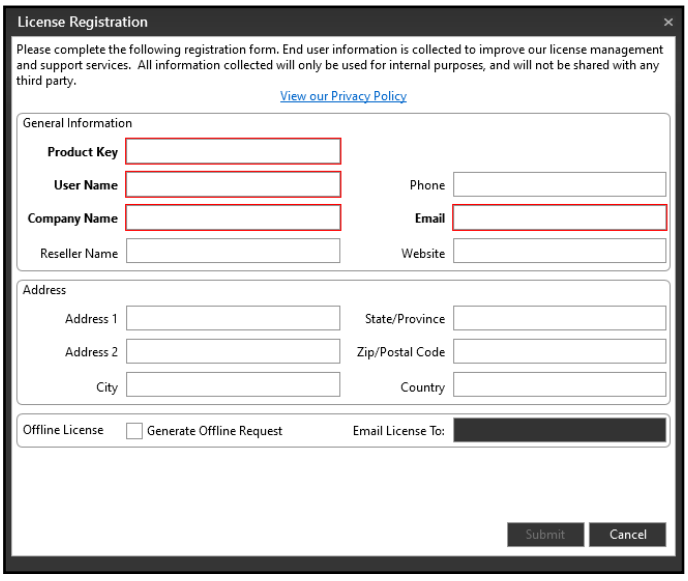
Open the Deployment Manager and click the "Plus" (+) icon in the bottom-left to create a new Deployment.

- **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

1. 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.



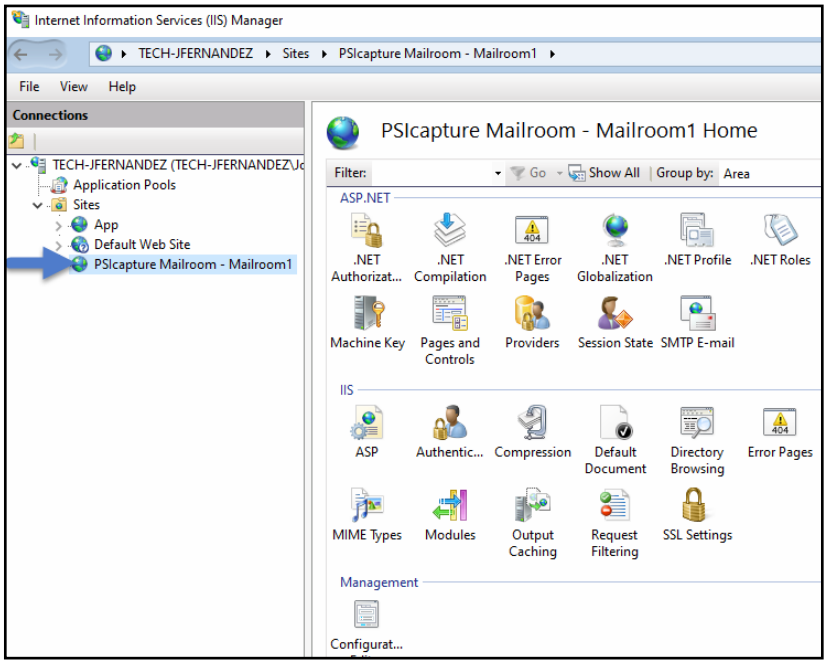
3. Once complete, click "Submit" to complete the internet-based registration process, or check the box for "Generate Offline Request" license offline.
4. Click "Save" back at the Deployment Manager screen to complete the licensing process.

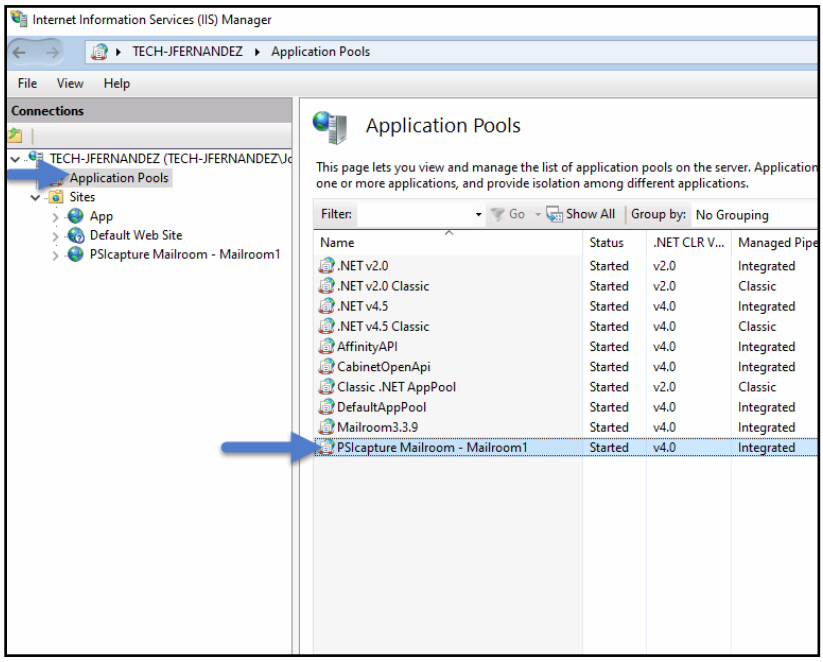
PSIcapture Mailroom Permissions Verification

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.

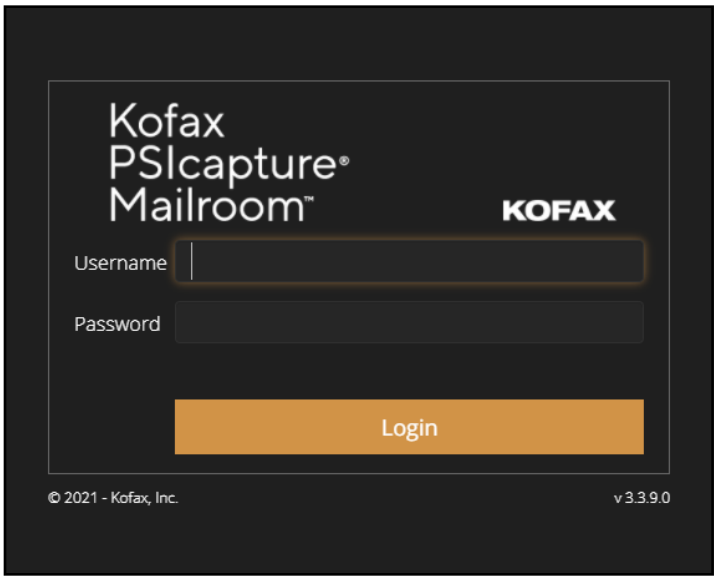




- Binding PSIcapture Mailroom to a 443 Port and corresponding SSL Certificate allows the site to be converted to HTTPS.
- A detailed, technical log of any actions performed by the installer can be found at C:\ProgramData\PSIGEN\Fusion\Setup\InstallLog.txt. This log also includes details on any errors 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



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.

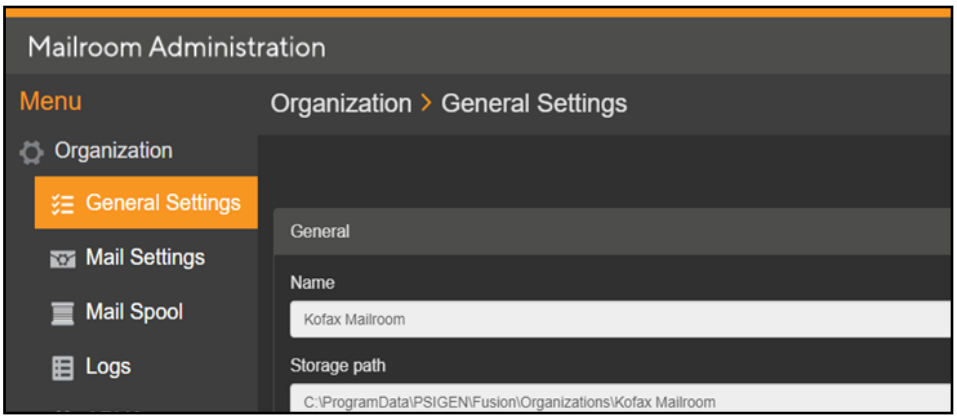
The "Contact Support" link for users can be customized with a unique link for your business needs.

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.



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.