

1. PURPOSE OF DEMONSTRATION

This job depicts the importing of emails from an IMAP “inbox” processing them into a folder as either the original EML or PDF format; selected by the user.

NOTE: The import process is using an “IMAP” connection to a mailbox on an email server & will need to be set-up to use a mailbox which you have access to. The mailbox in the demo is a dummy one

2. COMPATIBILITY

- EzeScan 4.3.60 (and above)
 - EzeScan licenced with these modules...
 - Pro
 - Index (KFI)
- Mailbox with IMAP enabled

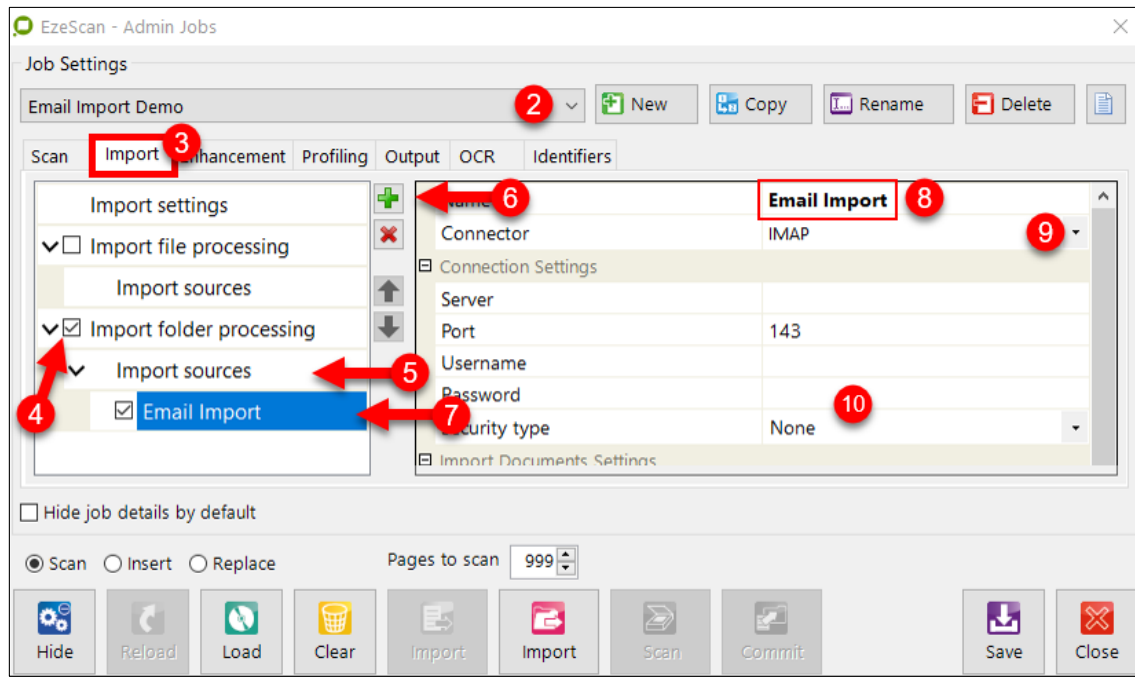
3. INSTALLATION INSTRUCTIONS


3.1. Load EzeScan

1. Select Admin → Settings Backup → Select Import
2. Click the button and browse to the **Email_Import.cfg** file
3. Click the import button
4. When completed, click the close button
5. Press **F6** and select "**Email Import Demo**" from the Job Type drop down list
6. Click the **Save** button
7. When prompted click **Yes** for the **Output Directory** message
8. Click **Close**

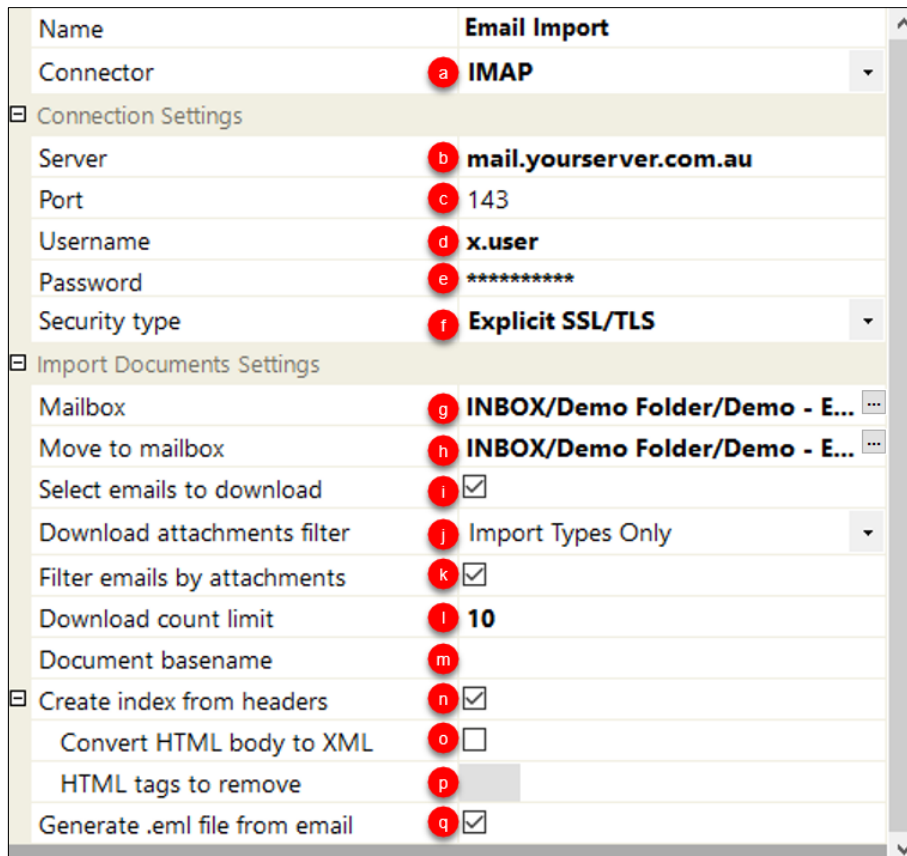
4. IMPORT CONFIGURATION

1. Press the F6 key to load the EzeScan Operator screen
2. Select "**Email Import Demo**" from the drop down list
3. Open the **Import** tab



4. Tick the **Import folder processing** box ☒
5. Select **Import sources**
6. Click on the plus  button (to add the new import source)
7. The new import source will appear (default name = Import profile #1)
8. Give it a meaningful name (e.g. Email Import)
9. Select **IMAP** from the pull down list

10. The “Import Source” box needs to be completed, as shown below:

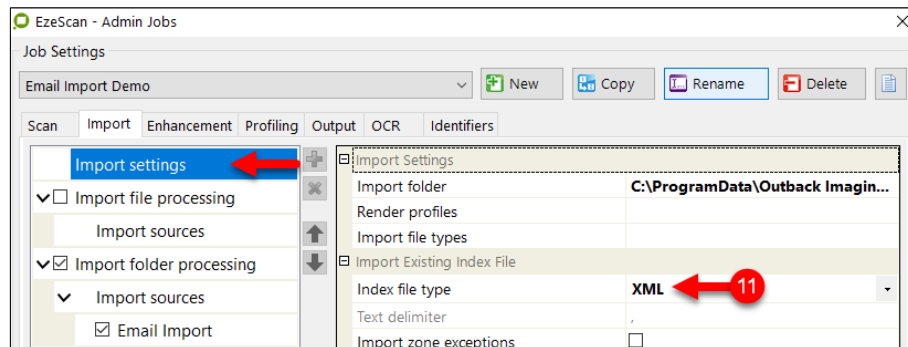


Email Import	
Name	Connector
	a IMAP
Connection Settings	
Server	b mail.yourserver.com.au
Port	c 143
Username	d x.user
Password	e *****
Security type	f Explicit SSL/TLS
Import Documents Settings	
Mailbox	g INBOX/Demo Folder/Demo - E... ...
Move to mailbox	h INBOX/Demo Folder/Demo - E... ...
Select emails to download	i <input checked="" type="checkbox"/>
Download attachments filter	j Import Types Only
Filter emails by attachments	k <input checked="" type="checkbox"/>
Download count limit	l 10
Document basename	m
Create index from headers	n <input checked="" type="checkbox"/>
Convert HTML body to XML	o <input type="checkbox"/>
HTML tags to remove	p
Generate .eml file from email	q <input checked="" type="checkbox"/>

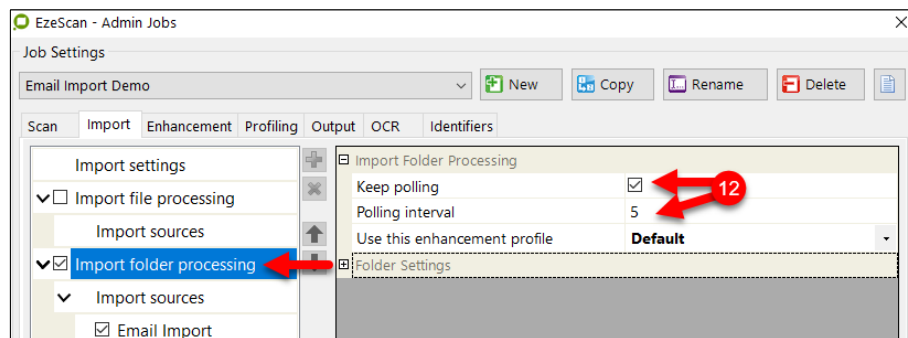
- a) Select **IMAP** from the list
- b) Add the **email server name** where the mailbox resides
 - **NOTE: you must change this setting as it is a dummy server address!**
- c) Add the **port** (generally it is 143) - speak to IT for advice on what port your email server uses
- d) Add the **username** of the mailbox
 - **NOTE: you must change this setting as it is a dummy email address!**
- e) Add **password** of the mailbox user
 - **NOTE: you must change this setting as it is a dummy password!**
- f) Select **Security type** (None or Explicit SSL/TCS or Implicit SSL/TCS)
- g) Select the **mailbox** the emails will be imported from by clicking on the ... box
- h) Select the **move to mailbox** (after processing) by clicking on the ... box
- i) Tick the **select emails to download** box
- j) The **Download attachments filter** will only download those file types as in the “Import settings” section - Import file types. Recommend to leave it at “Import Types Only”
- k) Tick **Filter emails by attachments** box ☒ if you want only email with attachments downloaded or leave unticked for all emails
- l) Set the download limit to **10** emails. This is to facilitate processing a small number of emails for the demo purposes.
 - All emails in the inbox would be imported if set to zero (0)

- m) Leave the **Document basename** field **blank** but if a base name is required when downloading the email or attachments then you could use one of the following:
 - <<Email:ToAddress>>, <<Email:Subject>>, <<Attachment:Base>>, <<Attachment:Number>>
- n) Tick the **create index from headers** box ☒
- o) Leave the **Convert HTML body to XML** unticked ☐
- p) Leave the **HTML tags to remove** field **blank** but if required use something like img;br;script
- q) Tick the **Generate .eml file from email** box ☒

11. Click on **Import settings** and then ensure **Index file type** is set to **XML**



12. Click on **Import folder processing** and tick the **Keep polling** box ☒; set the Polling interval to 5



13. Click on Save



NOTE: Further set-up details are available in the EzeScan User Guides.
Access them through Help on the toolbar

5. KFI CONFIGURATION

The demo config file contains a KFI set-up which may be changed to your own needs but will create either an EML format or PDF formatted file.

The fields in the KFI are:

Field Name	Comments
Senders Name	<ul style="list-style-type: none"> Takes the //name value from the XML data file <i>Value tab</i>
Senders email address	<ul style="list-style-type: none"> Takes the //address value from the XML data file <i>Value tab</i>
Date of email	<ul style="list-style-type: none"> Takes the //local value from the XML data file <i>Value tab</i>
Subject	<ul style="list-style-type: none"> Takes the //subject value from the XML data file <i>Value tab</i>
Filename	<ul style="list-style-type: none"> Custom extract from the <<Subject>> field <i>Value tab</i>
Output Type (EML or PDF)	<ul style="list-style-type: none"> Provides a selection list for operator to select from <ul style="list-style-type: none"> EML will save file in email format (with attachments) <ul style="list-style-type: none"> opens in an email client (e.g. Outlook) PDF will save the email and attachments into one PDF document <i>Format tab</i>

6. FILE OUTPUT OPTIONS

6.1. Default Settings

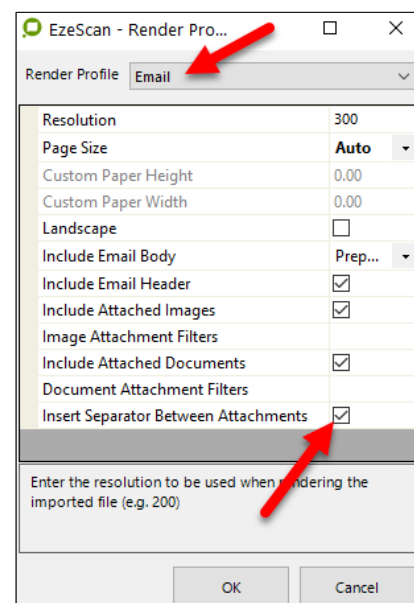
The job is set to output the email as EML or PDF and the defaults are:

- EML - original email with attachments (as it was received)
 - Original attachments will remain in same format as they were received
 - e.g. MS Word; MS Excel; JPEG image etc
- PDF - email header & body and any attachments are created into one PDF file.

6.2. Outputting the attachments into separate files


If there is a requirement to separate the attached documents you will need to change the **Render Profile** settings on the job.

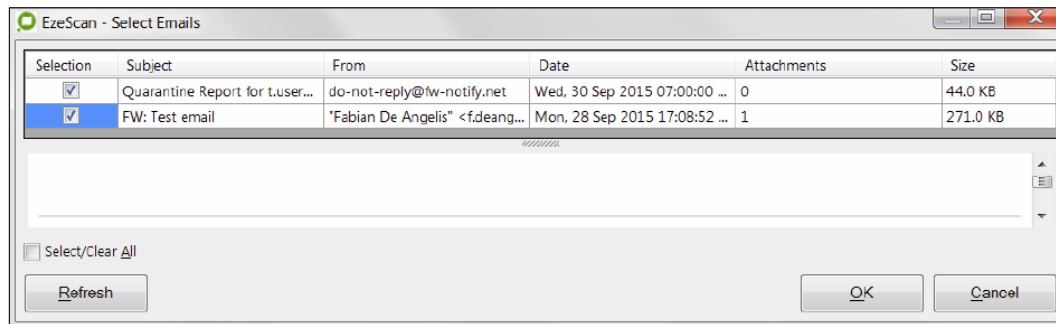
- Open the Job (**F6**) and click on the Import tab
- Click on **Import Settings**
- Click on **Render Profiles** option
- Select the **Email** render profile
- Tick the **Insert Separator Between Attachments** option ☒
 - The attachments will now be "split" by black separators and output to the folder in their original format.
 - The first document will be the email header/body
 - Each document will then be separated




7. OPERATION INSTRUCTIONS

Follow the steps below to process emails from the selected mailbox

1. Press **F6** to open the jobs screen
2. Select "**Email Import Demo**" from the drop down list
3. Click on the **Import** button 
4. Tick the boxes of the emails ☒ to be imported and click OK to process them.
TIP: Click Select/Clear All box to select all emails to be processed.



5. You will notice the image appear on the screen and thumbnails on the left.
6. Press the **F4** key or click on the Profile icon - 
7. EzeScan will now process each email document. The following information is gathered from the email:
 - Name of sender
 - Sender's email address
 - Date and time of email
 - Subject
 - Output type EML or PDF (file type) - this must be selected by the user¹
8. The resulting files will be output to the output folder as set in the Output tab of the Job
eg [C:\ProgramData\Outback Imaging\EzeScan\Output\Email Import Demo](#)

NOTE: Once the selected emails have been processed EzeScan will "poll" the inbox for more emails. Just click the Cancel button to complete the demonstration.

¹ Refer to **File Output options** section on previous page