**Mail box scanner**

**INTRODUCTION**

iDocuments Mailbox Scanner is an add-on to the purchasing module to periodically scan any number of Microsoft Exchange or GMail mailboxes to find new invoices emailed from suppliers for subsequent entry into iDocuments as a Purchase Invoice.

This feature is an optional add-on and requires very little configuration of a scheduled task.

To obtain a full end to end process, this add-on can be configured to work alongside the iDocuments Intelligent Capture add-on for OCR recognition and data pre-population.

## **MICROSOFT EXCHANGE ™**

The add-on takes advantage of the exposed connectivity of Microsoft Exchange Web Services, commonly known as EWS. This web service allow encrypted SSL connections to be established from remote application internally and externally, when exposed through the firewall, to specified mailboxes.

The requirements for Microsoft Exchange at present are 2007, 2007 SP1, 2010, 2010 SP1, 2010 SP2, 2013, 2013 SP1 or Office365.

## **GMAIL**

The add-on is able to connect to either personal or business tier accounts providing IMAP is enabled on the account and under the security setting it allows 3rd party applications to connect.

**MAILBOXES**

For successful retrieval of emails from suppliers mailboxes must be configured and enabled on a 1-1 company basis and active.

## **SCANNING**

Each active mailbox will be connected to and any new emails will be downloaded. Those with 1 or more PDF attachments will be processed as 1 invoice per PDF then marked as “read” so not to duplicate the download.

**REPORTING**

During the scanning process there are stages which cause information to be saved in a variety of locations and for a variety of reasons. The reasons for message logging can be seen below and can be saved to the following locations:

* Database report – this is a visual report accessible from iDocuments
* Summary email – this is sent to the email entered for the mailbox being scanned and summarises the number of failures and details of each on a single email
* Application error log – a text file held within the installation folder
* Machine Event Log – can be found from the Windows Application Event Viewer under the Administrative Tools and will be flagged with the application name

|  |  |  |
| --- | --- | --- |
| What was the reason? | Where is it logged? | What is logged? |
| Mail found and processed | Database report  Application log | Email details and files |
| Mail found without attachments | Database report  Application log  Summary email | Email details  Mailbox details |
| Mail found with no PDF’s | Database report  Application log  Summary email | Email details  Mailbox details |
| Mail processed with no location to save files available | Database report  Application log  Summary email | Email details  Mailbox details |
| Mail processed but cannot be flagged as read | Database report  Application log  Summary email | Email details  Mailbox details |
| Email send failed | Machine Event Log  Application log | Error message  Mailbox name |
| Fatal exception causing crash | Machine Event Log  Application log | Error message  Mailbox name |

As stated at the start of this document this application can be utilised alone or alongside the full OCR Intelligent Capture solution. Either way, the log is maintained during each step of the process and files are processed accordingly finishing with them being accessed via the Rapid Entry page.

The log can be accessed from the menu ***Admin > Audit > Intelligent Capture*** and will list all results from the scan and subsequent OCR results where applicable. From this report it can be seen where an email was found and what happened with the PDFs in regards to multiple files being processed or a single file being subsequently split into multiple files and their results.

Each record on the report can be grouped together by TransmissionID showing all the emails processed during a single instance of the scan running. During this unique scan each email found can be seen via the EmailID and then grouped together to see each file found with the FileID. If an error had occurred for any reason as above then the FileID will be zero.

All records where a file was successfully processed and saved and subsequently archived, a link can be selected to load the PDF – this is NOT the PDF referenced within the Rapid Entry page but is rather just an archived version of it.

If the OCR facility is installed, then a link can be selected to view the output from the PDF in text for review and identification into why any configured rules may have failed.

