



University of Colorado

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OnBase Guide - Mailbox Importer Configuration

Goal: To configure Mailbox Importer

Complexity Level: Departmental Administrative Users

7/11/2023

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Background

Mailbox Importer lets you configure OnBase to automatically import new messages from an email account you specify. Email messages are stored as documents in the specified document type according to the rules (conditions) and actions for the account.

When Mailbox Importer is running, all email messages that arrive in the inbox are entered into OnBase without user intervention. Attachments can be captured in the same way. Email messages and their attachments can be sent to a scan queue for further indexing.

When you set up a mailbox importer pointing at an email account, **EVERY** email sent to that account is imported into OnBase.

Mailbox Importer will mark emails it processes as read.

- They are not deleted or moved to a different folder.
- This is how items that have already been processed are identified so that they are not processed again.
- If any items are marked as read by a user with access to the inbox, they will not be identified by Mailbox Importer.
- If any items are marked as unread by a user with access to the inbox, they may be imported again.

Account Requirements

The mail account being used needs to be exempted from multifactor authentication.

Because every message is affected by Mailbox Importer, this should be used with an account specifically for this purpose, not an individual user's account or an account that users will have regular access to the inbox.

Unidentified Items

If the email does not match any rule you have configured, the email is indexed into the "SYS Unidentified E-mails" or "SYS Unidentified E-mail Attachments" document types. Items in these document types are automatically purged from the system after 2 weeks. When they are purged, they are unrecoverable, even from Document Maintenance.

To avoid your items being purged, you should configure your rules so that all items will match at least one rule to be added to one of your document types (even if that's a catch-all document type that will need to be reviewed).

You should also monitor the System Validation dashboards for any unidentified items.

Indexing

Mailbox Importer does not index items to an individual's record in OnBase using Employee ID/Student ID. It can populate the following keywords:

- MAIL From
- MAIL From Address
- MAIL To
- MAIL To Address
- MAIL Cc
- MAIL Cc Address
- MAIL Bcc
- MAIL Date
- MAIL Date Time
- MAIL Subject
- MAIL Attachment Count
- MAIL Attachment Name
- MAIL MessageID

You may need to perform additional indexing on the item to attach it to a student/staff record, such as in Workflow or using a Scan Queue.

Prerequisites

You will use the Configuration client to set up this process, so ensure it is installed. Refer to the [OnBase Client Guides](#) for instructions on installation.

Before configuring Mailbox Importer, complete [the hands-on lab](#). Hyland Training includes some [other courses on Mailbox Importer](#) as well.

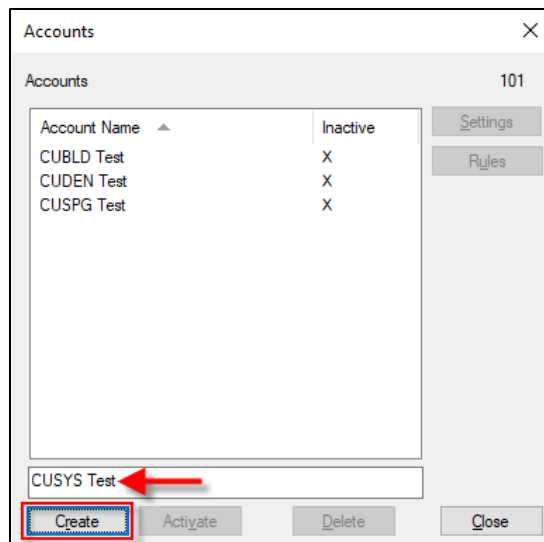
Additional information is available in the Mailbox Importer MRG.

Contact UIS_DM_Support@cu.edu for assistance.

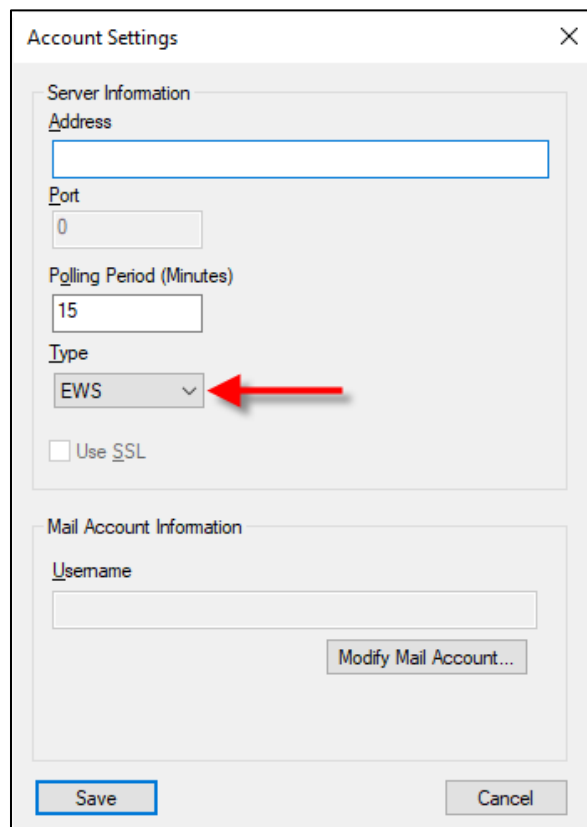
Configuring a Mailbox Importer Account

These steps apply when using an exchange account, see below for using an MS Graph account with Azure.

1. Open the Configuration client and navigate to **Import > Mailbox Importer > Accounts**.
2. Type the name of your account and click **Create**.



3. Before populating the **Address** field, change the **Type** field to “EWS.”



4. The value of the **Address** field will depend on what campus you are on. Please follow the conventions below. For this example, a CUSYS account will be used.

Campus	Value
CUBLD	https://outlook.office365.com/EWS/Exchange.asmx
CUDEN	https://outlook.office365.com/EWS/Exchange.asmx

CUSPG	https://outlook.office365.com/EWS/Exchange.asmx
CUSYS	https://outlook.office365.com/EWS/Exchange.asmx

5. Change the **Polling Period** to the desired value. By default, Mailbox Importer will check for new messages to import every 15 minutes but this can be updated to be more or less frequent. The value must be between 1 minute and 1440 minutes (24 hours).
6. Then click **Modify Mail Account...** to enter the credentials for the email account you want to import from.

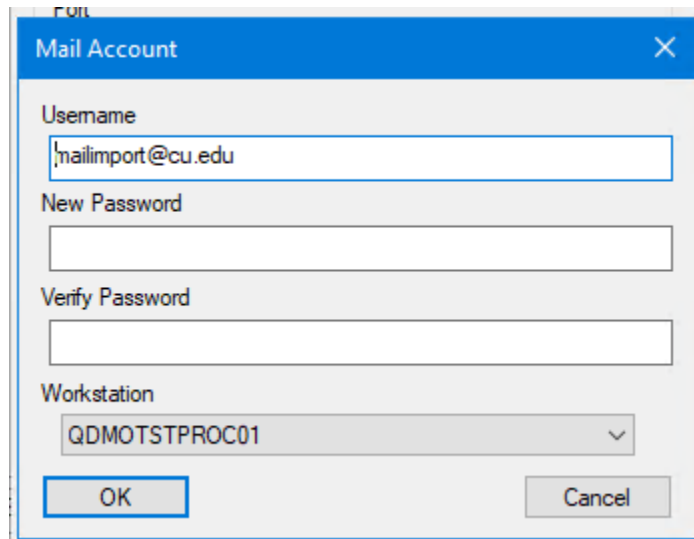
NOTE: This will need to be done after each [refresh](#) in the non-production environments!

7. The **Username** field will also vary depending on the campus you are configuring for. Please follow the conventions below. For this example, a CUSYS account will be used.

Campus	Value
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CUBLD	Follow the username with “@colorado.edu”
CUDEN	Follow the username with “@ucdenver.edu”
CUSPG	Follow the username with “@uccs.edu”
CUSYS	Follow the username with “@cu.edu”

8. Type the account’s **Password** in the appropriate fields.
9. Select the **Workstation** that ends in “...PROC01” which corresponds to the environment you are using. The server name will contain PRD, TST, STG or DEV to indicate the environment.



10. Click **OK**, then **Save**.

MS Graph/Azure Modern Auth Setup

These steps would be completed by whomever manages your Azure applications.

1. Navigate to <https://portal.azure.com> in a web browser.
2. Login with your Azure administrator account.
3. On the main home page, click the **Azure Active Directory** button under **Azure Services**.
4. In the left-pane of the **Overview** page, click the **App registrations** link.
5. On the **App registrations** page, click **New registration**
 - a. Input a friendly name for your application
 - b. Set the **Supported account types** to **Accounts in this org directory only (Single Tenant)**
 - c. Leave the **Redirect URI** blank
 - d. Click **Register**
6. On the **Main Page** for your application

- a. Copy and paste the **Application (client) ID** to use later
- b. Copy and paste the **Directory (tenant) ID** to use later
- c. Click the **View API Permissions** button partway down the screen
 - i. Click **Add Permission**
 1. Click **Microsoft Graph**
 2. Click **Application permissions**
 3. Check **Mail.ReadWrite** and **Files.ReadWrite.All**
 4. Click **Add permissions**
7. At this point, an administrator may need to Grant Consent to the permissions to your application in order to continue with configuration
8. From the left-hand pane under **Manage**, click **Certificates & secrets**
 - a. Click **New client secret**
 - i. Input a description for the secret
 - ii. Leave the expiration at one year
 - iii. Copy and paste the **Client Secret Value** to use later

The Application Registration Mailbox Importer will use has an assigned Client ID and Client Secret that it may use to authenticate against Office 365 to access mailboxes hosted in Office 365. This follows the OAuth 2.0 Client Credentials authentication flow. Since the Mailbox Importer Service is a background application that runs as a Windows Service, it relies on **Application Permissions** instead of **Delegated Permissions**. Delegated Permissions refer to a specific interactive user; App Registrations may not use Delegated Permissions to access mailbox resources since there is no interactive user for Mailbox Importer.

The **Mail.ReadWrite** permissions **is** required since Mailbox Importer will mark an email as read once it has been processed.

Please note that the Mailbox Importer Service will impersonate as the mailbox it needs to access and the Application Permissions for Mail.ReadWrite will grant it access to all mailboxes inside your Office 365 tenant.

To restrict the access of a specific application registration, please refer to the following Microsoft Documentation on how to create an Application Access Policy: [Limiting application permissions to specific Exchange Online mailboxes - Microsoft Graph | Microsoft Learn](#).

Please note: when configuring the OnBase Mailbox Importer account, you must provide a full email address with a fully qualified domain name for the Username in

the Mail Account Information dialog. It must follow the format name@yourtenant.onmicrosoft.com or whatever fully qualified domain you have in Office365.

In OnBase Config, Under Modify Mail Account, use Web Integration Settings. The Client ID will be the **Azure Application ID**, used with Office 365 and OAuth.

Account Settings

Server Information

Address / Tenant ID
[Azure Directory (tenant) ID]

Port
0

Polling Period (Minutes)
1

Type
MS Graph

Use SSL

Mail Account Information

Username
[]

Modify Mail Account...

Save Cancel

Web Integration Settings

Integration Type
Mailbox Importer

Service Type

- None
- Google
- Office 365
- Exchange
- Forge

Settings

Client ID
Azure Application ID

Client Secret
Client Secret Value

Server URL

Authentication Type

- OAuth
- Kerberos
- Impersonation

Service Account User

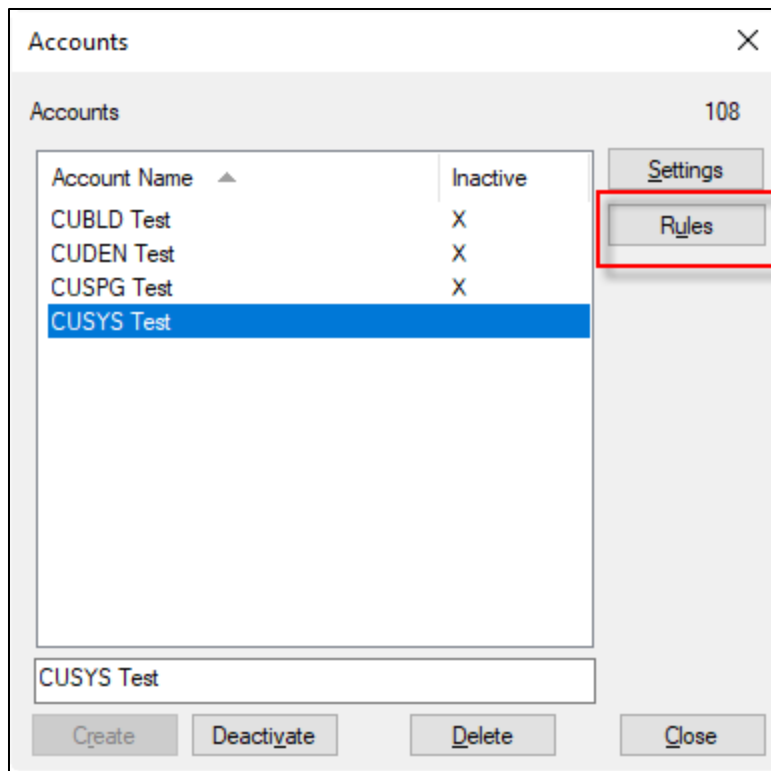
Service Account Password

Save Cancel

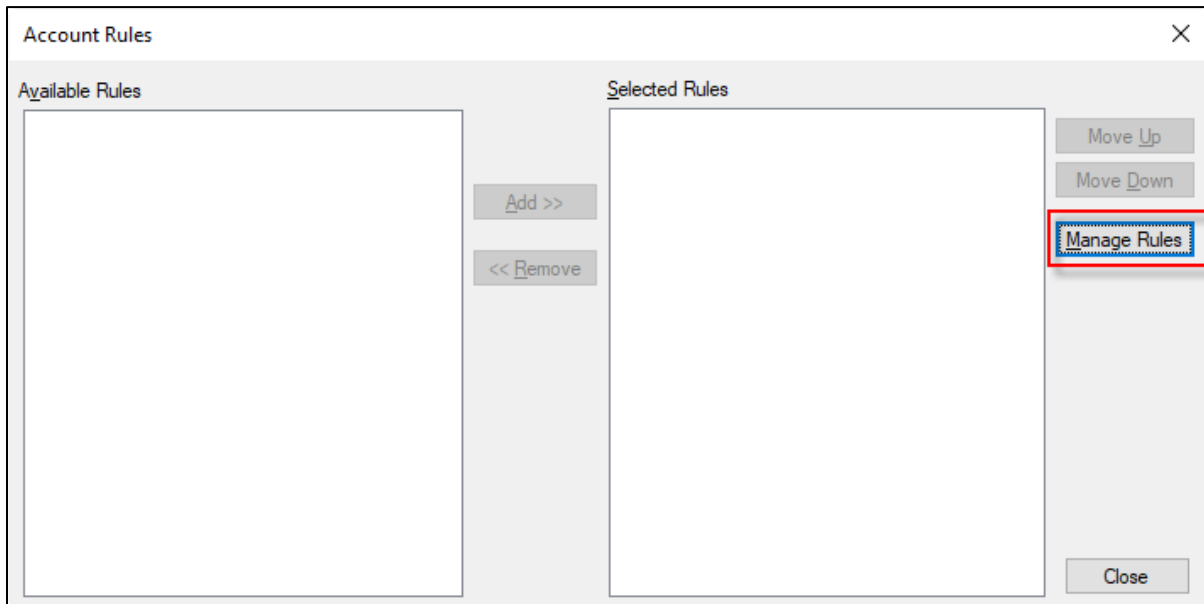
Configuring Mailbox Importer Rules

Rules define how messages are processed by Mailbox Importer, to store items in different document types or use different options depending on characteristics of the message and/or attachments.

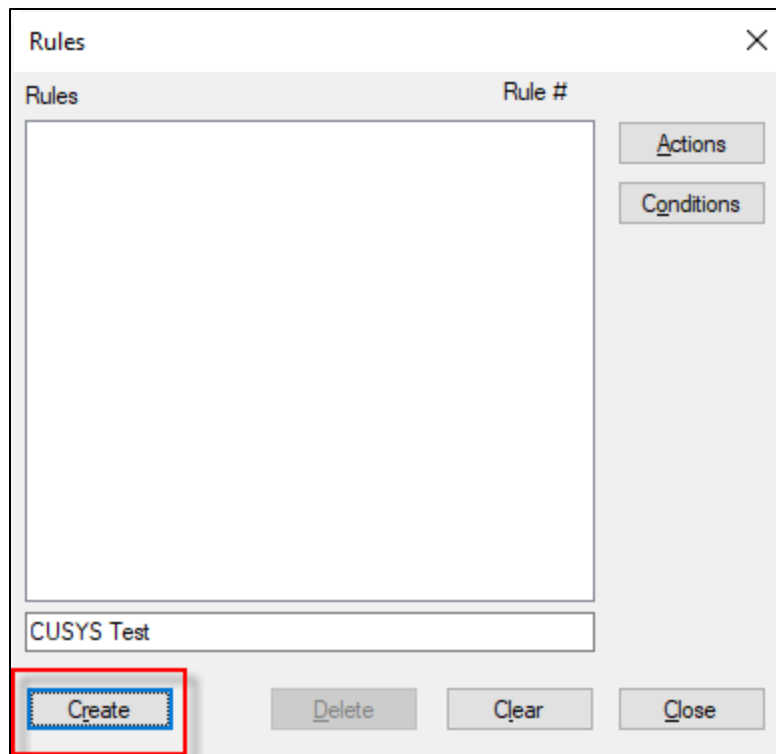
1. On the Accounts screen (**Import > Mailbox Importer > Accounts**), select the account you want to add rules to and click the **Rules** button.



2. If a rule that you want to use does not exist in the left-hand column, click the **Manage Rules** button on the right.



3. Type a name for your rule and click **Create**.

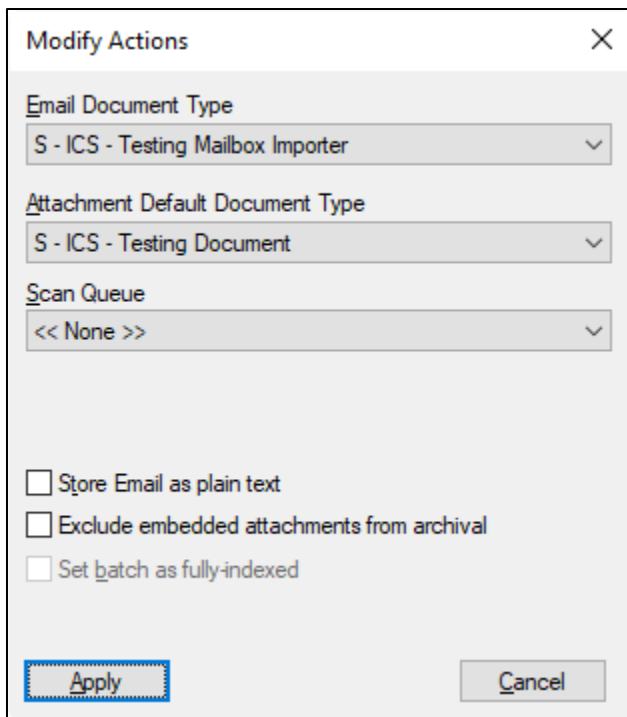


4. The Actions screen will appear. You will need to select an **Email Document Type** to store the emails and an **Attachment Default Document Type** to store the attachments to the emails. You may need to create new document types for these.

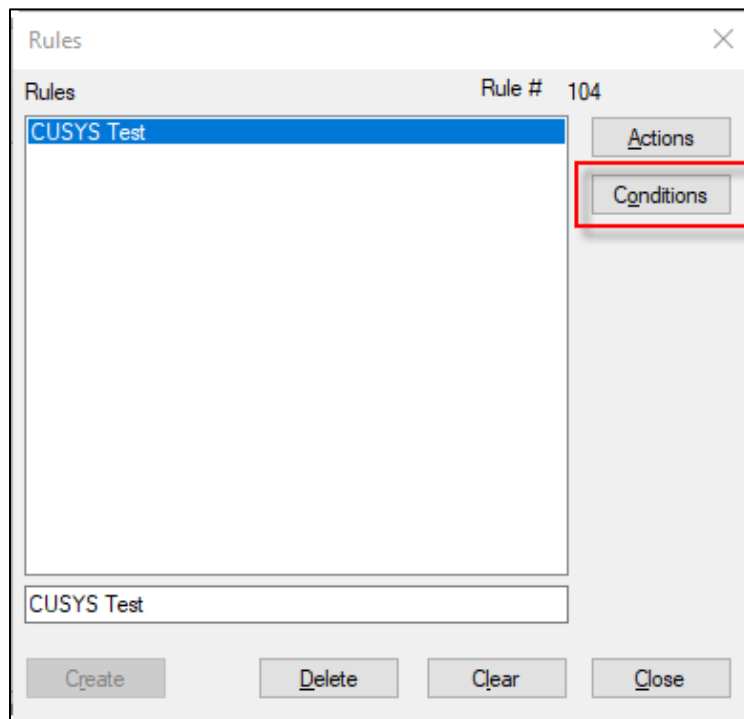
NOTE: You *CAN* leave the Document Type fields unconfigured, but that will send all emails and attachments to the “SYS Unidentified E-mails” and “SYS Unidentified E-mail Attachments” document types, respectively.

You can also configure the items to be added to a **Scan Queue** for further indexing/processing, as described in the [Prerequisites and Considerations](#) section.

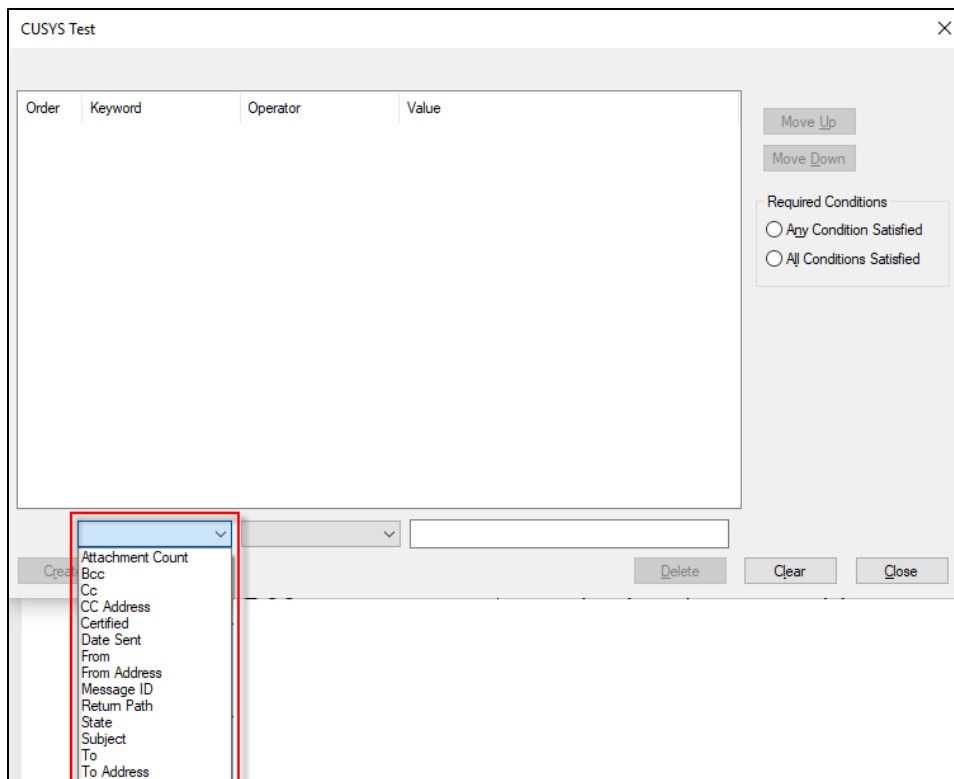
5. Once you’ve made the appropriate modifications, click **Apply**.



6. Back at the rules screen, click the **Conditions** button.

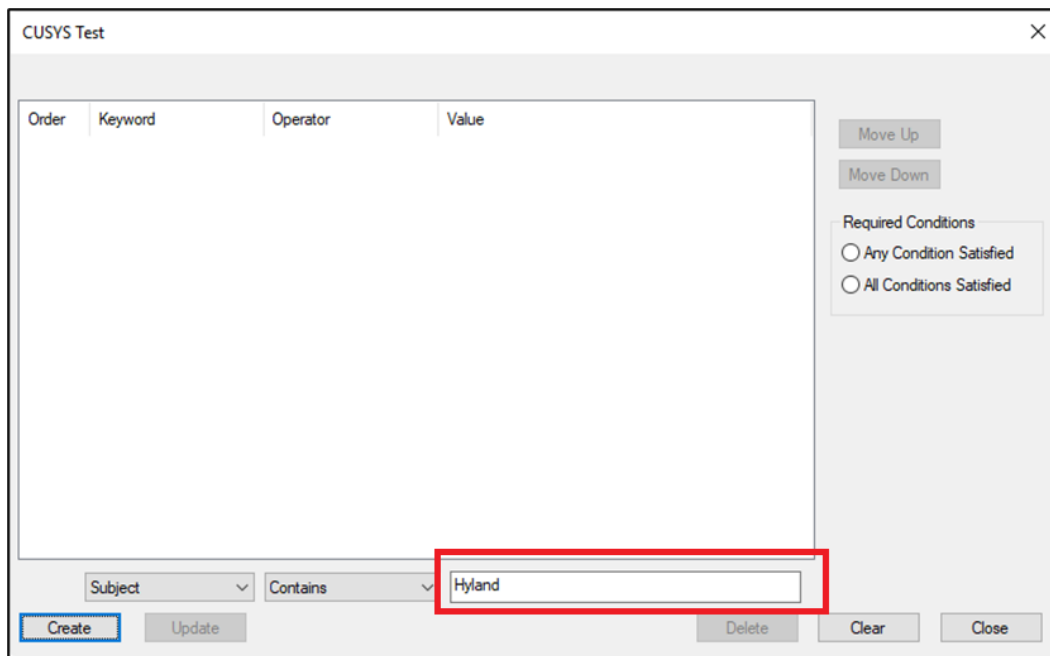


7. The first drop-box menu will list the properties of the email that you can use to create conditions for whether emails are processed according to the rule. Select the desired property.



NOTE: “Cc,” “From,” and “To” are differentiated from the properties ending in “...Address” (ex. From Address) in that the former properties represent the display name, as opposed to the actual email address.

8. The second drop-box menu will show the operators you can use to evaluate the property selected in the first list. These will vary based on the property you select in the first menu. Select the desired value. The total list of conditions is as follows:
 - Equal To
 - Not Equal To
 - Contains
 - Begins With
 - Ends With
 - Less Than
 - Greater Than
9. Type the desired value for the evaluation in the box on the right.



NOTE: When using the “Contains,” “Begins With,” or “Ends With” operators, you do NOT need to include wildcards in your string. Additionally, the Value is NOT case sensitive.

10. Click **Create**.
11. Once you have one condition, the **Required Conditions** field is automatically set to “Any Condition Satisfied.” You can create additional conditions and change this value to “All Conditions Satisfied,” however that means the rule will not fire unless every condition you define is met.
12. Once you have finished creating conditions, click **Close**. Click **Close** once more.
13. The rule you created will appear in the left column. Select it, and click the **Add >>** button to move it from the Available Rules column to the Selected Rules column.
14. Click **Close**.

Final Note on Modifying Mailbox Importer Configuration

When creating a new Mailbox Importer account/rule, or modifying existing accounts and rules, the changes will not take effect until the following day after the Mailbox Importer service restarts (early every morning).

If the addition/change is crucial and must take effect immediately, a manual restart can be performed. Please contact UIS (uis_dm_support@cu.edu) to request a restart.

