OnBase Guide - Mailbox Importer Configuration

Goal: To configure Mailbox Importer

Complexity Level: Departmental Administrative Users

7/21/2021
Background
Mailbox Importer lets you configure OnBase to automatically import new messages from an email account you specify. Email messages become documents and the document type used is determined through the definition of conditions and rules for the account.

When Mailbox Importer is running, email messages that arrive in your inbox are entered into OnBase without user intervention. Attachments are captured in the same way. Email messages and their attachments can be sent directly to a scan queue for further indexing. Additionally, image attachments can be automatically run through an OCR process upon import.

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.

Unidentified Items
If the email does not match a 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.

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](mailto:UIS_DM_Support@cu.edu) for assistance.

---

**Configuring a Mailbox Importer Account**

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.

<table>
<thead>
<tr>
<th>Campus</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUBLD</td>
<td><a href="https://outlook.office365.com/EWS/Exchange.asmx">https://outlook.office365.com/EWS/Exchange.asmx</a></td>
</tr>
<tr>
<td>CUDEN</td>
<td><a href="https://outlook.office365.com/EWS/Exchange.asmx">https://outlook.office365.com/EWS/Exchange.asmx</a></td>
</tr>
<tr>
<td>CUSPG</td>
<td><a href="https://outlook.office365.com/EWS/Exchange.asmx">https://outlook.office365.com/EWS/Exchange.asmx</a></td>
</tr>
<tr>
<td>CUSYS</td>
<td><a href="https://outlook.office365.com/EWS/Exchange.asmx">https://outlook.office365.com/EWS/Exchange.asmx</a></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Campus</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUBLD</td>
<td>Follow the username with “@colorado.edu”</td>
</tr>
<tr>
<td>CU DEN</td>
<td>Follow the username with “@ucdenver.edu”</td>
</tr>
<tr>
<td>CUSPG</td>
<td>Follow the username with “@uccs.edu”</td>
</tr>
<tr>
<td>CUSYS</td>
<td>Follow the username with “@cu.edu”</td>
</tr>
</tbody>
</table>

8. Type the account’s **Password** in the appropriate fields.

9. Select the **Workstation** that ends in “…PROC01.” (This should be the only option in the list. If not, scroll through the list to find the appropriate workstation.)
10. Click **OK**, then **Save**.

### Configuring Mailbox Importer Rules

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 Regarding Creating/Modifying Accounts/Rules**

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 MailboxImporter service resets (early AM). If the addition/change is crucial and must take effect immediately, a manual reset can be performed. Please contact UIS (uis_dm_support@cu.edu) to perform a reset.