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white paper

# ImageNow Mail Agent

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## Introduction

Moving to an online management system that offers rich document imaging, management and workflow tools is one of the best productivity decisions your company can make. With ImageNow® installed and a clear end in sight to the paper trail, Mail Agent extends the capture process to include e-mail.

Mail Agent captures e-mail and attachments that are sent to designated accounts and delivers them to ImageNow for review and processing. Mail Agent allows you to automatically send resumes to a folder based on job title, move e-mail faxes to a departmental drawer, or put customer e-mail inquiries into a workflow queue that ensures they are viewed by customer service within 30 minutes. Mail Agent can also provide confirmation when it receives an e-mail.

This white paper outlines the benefits of using Mail Agent, the e-mail standards used, and the system requirements to run Mail Agent. Also outlined are some of the business cases that demonstrate how Mail Agent can be used in the real world.

## Why Use Mail Agent?

Any company wanting to store information contained in e-mail messages can use Mail Agent. It does not require a client-side e-mail product to manage messages. Following are the benefits of using Mail Agent.

- **Consolidate documents**  
Mail Agent empowers companies to manage their e-mail in the enterprise, and to store and manage documents in one central location, the ImageNow repository.
- **Generate index keys automatically**  
During the Mail Agent import process, you can specify unique document identifiers such as To, From, and Subject, to serve as index markers for storing and retrieving sent documents. In this way, Mail Agent collects the data you need from each received e-mail, and eliminates the need for manual document linking. If you have a multi-page TIFF, you can also index the pages separately.
- **Benefits of using Web forms**  
Mail Agent can extract specific data from e-mail messages that are generated from a Web form. You can collect resumes by job title, social security number, and name in order to populate document key values that assist with the document linking process. Data from Web forms can also assist with document searching.
- **Multiple e-mail accounts**  
In addition to multiple e-mail accounts, you can configure each account to meet the different requirements of each group in the organization. Each group must be setup in ImageNow.
- **Integrate information directly into workflow**  
Imported e-mails and their attachments can be automatically entered into ImageNow workflow queues in preparation for routing according to internal business processes.
- **Forward and reply capability**  
To archive e-mail, for example, you can automatically forward e-mail messages that are imported by Mail Agent. Optionally, you can then send an automatic e-mail confirmation back to the sender.
- **Efficient architecture**  
Mail Agent is a multi-threaded architecture. It can manage numerous requests while communicating between e-mail servers and ImageNow Server. Mail Agent can be installed on a server other than ImageNow Server. Performance and load issues are not managed by the server running Mail Agent.

## Business Cases for Use

Following are two cases for using Mail Agent in the government and healthcare sectors.

### Government

Joan is a hiring manager positioned in the human resources group at a state agency. She receives resumes daily. By using Mail Agent, Joan monitors her e-mail account every 15 minutes for new resumes. When one is detected, the Mail Agent imports an e-mail automatically into ImageNow software, along with any attachments.

The e-mail is then assigned to the "HR" drawer, in the "resume" folder. The index values are set to Date Sent and Job Title, the latter of which is collected automatically from the e-mail subject field when an applicant clicks to submit a resume.

With the new resume in ImageNow and the index keys set, the resume is then assigned to a workflow queue for review and routing. The automatic notifications Joan has set-up include auto-confirmation in response to submitted resumes, and an alert to notify her that a new resume is ready for review. Strong candidates are forwarded to the hiring manager via workflow, and the remaining resumes are kept on file.

### Healthcare

John, an accounts payable employee at a large pharmaceutical company, is responsible for reviewing employee expense reports. John created a Web form to collect employee data, including the spreadsheet containing expense report data.

With Mail Agent, John monitors the e-mail address where expense reports are sent, and extracts employee name, identification number, and department title from the Web form to generate document key assignments.

If a new report is added to his workflow queue, Mail Agent notifies John. He conducts his review, and then routes the report for final manager approval. John has also configured Mail Agent to forward all e-mails to another e-mail account monitored by the Quality Control team for periodic auditing purposes.

## E-Mail Standards

Mail Agent uses the POP3 and SMTP standards to receive and send e-mail. Mail Agent works with all POP3 and SMTP e-mail servers.

Standards that are not supported by Mail Agent include IMAP and MAPI. When Mail Agent imports e-mail, it brings the content in as text, not HTML.

- **POP3**  
POP3 (Post Office Protocol Version 3) is a standard protocol for receiving e-mail from an e-mail server. Most e-mail products use the POP protocol. Unlike POP2, the latest version POP3 can be used independently of protocols that work to send e-mail.
- **SMTP**  
SMTP (Simple Mail Transfer Protocol) is a standard protocol for sending e-mail between e-mail servers. Messages are then retrieved by the e-mail client using a protocol for receiving e-mail, such as POP. SMTP is typically used to send e-mail from an e-mail client to an e-mail server.

## High-Level Architecture

Mail Agent offers customers an efficient architecture. Multiple Mail Agents can reside on separate e-mail servers and communicate with a single ImageNow Server. In this way, groups in an organization can keep their own settings and restrict user access.

Multiple e-mail accounts can be configured with a single Mail Agent, which helps organizations to manage large amounts of e-mail. Mail Agent does not need to reside on ImageNow Server nor a mail server.

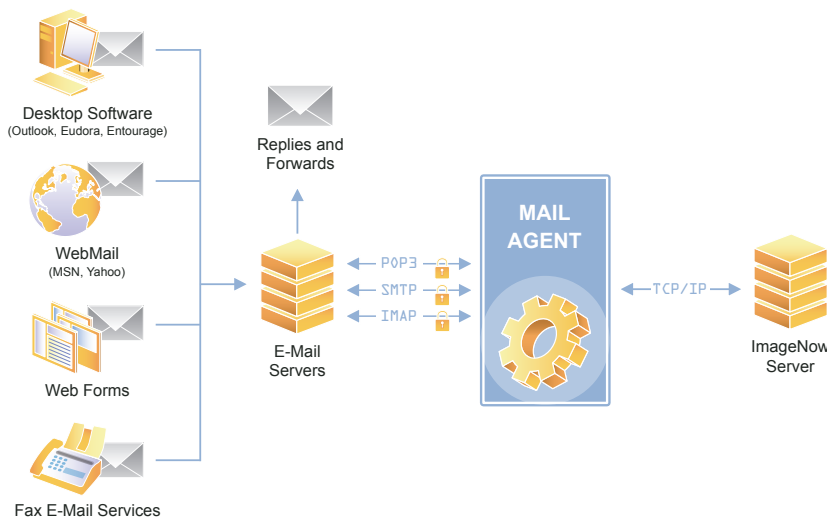


Figure 1: High-level architecture of Mail Agent.

Mail Agent uses the POP3 protocol to receive e-mail and SMTP to forward or reply to e-mail. POP3 is used by the more common e-mail products such as Microsoft® Outlook® Express and IBM® Lotus Notes®. Mail Agent communicates with ImageNow Server over TCP/IP to store images and other specified data that is imported from the various e-mail accounts.

## File Type Exclusions

Mail Agent can optionally exclude certain file types in order to protect your system. By removing certain file attachments in an e-mail during the import process, the security risk of transferring computer viruses via e-mail is reduced. Mail Agent can be configured to exclude the following file types:

- .bat
- .exe
- .com
- .pif
- .cmd
- .js
- .vbs
- .dll
- .sit

## Automatic Document Indexing

Mail Agent can automatically index and store e-mail messages and attachments based on the values outlined in Table 1 below.

ImageNow Server Properties
Unique ID
Time Stamp
Serial Value
Literal Value
E-Mail Properties
From / Sender
To / Recipient
CC (Carbon Copy line)
Subject
Send Date
Reply To or Return Path
Body
Attachment Count
Functions()
Search (for String in e-mail properties that are listed above)

Table 1: Document indexing values available for use with Mail Agent.

## E-Mail Servers Supported

Mail Agent supports all POP3 e-mail servers including those listed in Figure 2.

E-mail Products	Supported	Setup Considerations
Microsoft Exchange®	Yes	POP3 not set by default
IBM® Lotus® Domino® E-mail Server	Yes	
Novell® GroupWise®	Yes	
Oracle® Collaboration	Yes	
Eudora® WorldMail™ Server	Yes	POP3 set by default
Sendmail®	Yes	

**Table 2:** The e-mail servers that Mail Agent supports.

## System Requirements

Mail Agent follows the same minimum requirements as ImageNow Server.

Environment	Operating Systems	Setup Considerations
Microsoft® Windows®	Microsoft® Windows NT® Server 4.0 with Windows NT SP4 Microsoft® Windows Server® 2000 and 2003 Microsoft® Windows 2000 and Microsoft Windows XP	Server class system for enterprise environments Standard TCP/IP networking 100-MB NIC preferred (UNIX) Pentium III or greater 1-MB memory per e-mail account 2-MB hard disk space

**Table 3:** System requirements of Mail Agent.

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