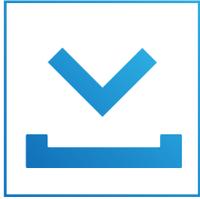advanced document capture software
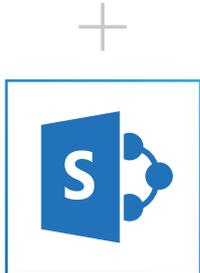
# PSIcapture

**ACDI**

## PSIcapture SharePoint Migration

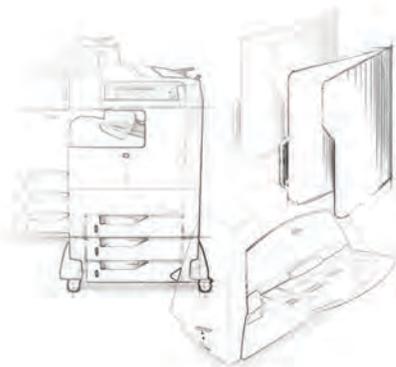### Optimize SharePoint with Compatible Capture and Indexing

SharePoint allows for collaboration throughout the organization, but how can you provide an easy-to-use, flexible onramp to capture paper documents into your SharePoint Document Libraries? PSIGEN has the answer. PSIcapture provides a direct integration with SharePoint, which allows users to capture documents, extract data and route indexed documents directly into the appropriate SharePoint Libraries and Folders.

By connecting with your SharePoint site, PSIcapture is able to look up existing data from your site to populate index fields. Indexed data can be mapped to a SharePoint site's Managed Metadata, Libraries and Content Types, so that when documents are routed to the SharePoint site, the indexed data will be attached to the appropriate fields designated in SharePoint. Users can also create a file-naming scheme and dynamic folder structures directly from PSIcapture.

The PSIcapture workflow can either be utilized in Interactive or Auto-Import mode. Interactive mode allows for power users to utilize all the features and functions of the software from the desktop. In Auto-import mode, users can scan to a processing folder from any network scanning device, and the documents will be automatically processed, named and filed based on workflow configuration.

Using PSIGEN's advanced automation features with the SharePoint integration, users can create a workflow that is extremely efficient, requiring little to no user intervention.
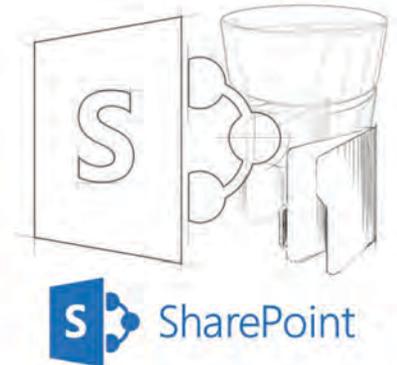
To learn more about PSIGEN for SharePoint, contact your reseller or PSIGEN today.

Documents are captured using traditional capture tools such as scanners, MFPs, networked scanners, or via watched folders.

PSIcapture processes, separates, names, and provides folder structure based in part on barcode recognition.

Documents are migrated into multi-level folders in Microsoft SharePoint Document Libraries.

acd-inc.com/psicapture | 800.990.2234 | sales@acd-inc.com

# PSIcapture Can Perform The Following Tasks with SharePoint:

**PSIcapture is compatible with SharePoint 2007, 2010, 2013 & Office 365.**

## Import SharePoint Document Library configuration to pre-configure PSIcapture

» PSIcapture provides a Document Type template for SharePoint, which sets the workflow up to publish processed documents to SharePoint and allows the user to import the data from their SharePoint Site for simple configuration.

## Select SharePoint Site based on metadata (multi-Site in One Batch)

» Automate the publishing of your documents to SharePoint by defining the Site destination using metadata criteria.

## Publish documents and metadata to Document Libraries

» PSIcapture converts documents into searchable PDFs and publishes them to SharePoint. Once documents have been processed in PSIcapture, there's no need to manually enter data into SharePoint metadata fields.

## Create Document Libraries on the fly – named by metadata

» New SharePoint Document Libraries can be automatically created in the PSIcapture workflow.

## Populate Term Stores to support Managed Metadata

» You can populate Term Stores directly in PSIcapture—no need to take an extra step by setting them up in SharePoint.

## Create Folder Structure – named by Metadata (unlimited levels)

» PSIcapture gives you the ability to create folder structures within your document workflow. If folders don't already exist in your SharePoint Library, PSIcapture can create them for you.

## Provide a relevant document title – based on metadata

» PSIcapture allows you to set up a file-naming scheme using various values from your documents so that documents can be automatically named, making them easy to identify once they are published to SharePoint.
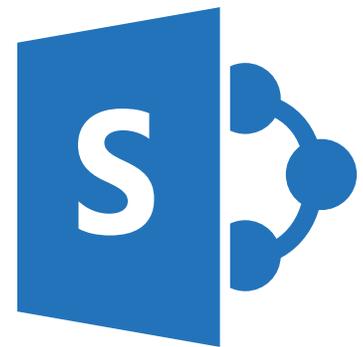
## Use SharePoint as a provider lookup

» PSIcapture makes it easy to extract data with the lookup function. PSIcapture can run lookups on your SharePoint Site and use existing data from your the Site to populate index fields.

## Create Document Sets

» Document Sets allow you to manage multiple documents as a single item in SharePoint, making them a useful tool for keeping your documents organized. PSIcapture allows you to determine these Document Sets within your PSIcapture workflow.

## Set Content Types (Document & Folder)

» During configuration, PSIcapture allows you to select the Content Type you want to associate your documents with.

PSIGEN is the innovative leader in advanced capture applications dedicated to helping companies automate document processing by extracting data and utilizing it to name, index, format and route documents along the electronic path to storage. The lasting result is a more productive end user, using fewer mouse clicks and keystrokes, accomplishing complex and powerful document workflows.

# PSI**capture** Architecture
## Capture Server Network



Scanning MFP

Watched Folder

License Server

Scanning MFP

Auto Import

PSI**capture**

RightFax Server

Capture Server manages batch database, images and all metadata.

SharePoint Server

Capture Stations

Index, QA, OCR, Migrations