TCGIII
ENABLE THE DIGITAL ENTERPRISE

Email Triage Onboarding

Instructions: Setting up the email triage process is simple with 3 steps below.

STEP 1: Specify the shared mailbox to triage

It is required to provide TCG with the address of the shared mailbox to triage, along with the credentials for the mailbox, the Import folder if it is anything else other than "Inbox". In addition, you will need to create a processing folder and the error folder.

The current version of the Email Triage solution supports Microsoft Office 365 using the GRAPH protocol. Anything else, please contact your local TCG Representative to discuss other options.

All fields below are mandatory.

Shared Mailbox address:			
Client ID:		Tennant ID:	
Secret Value: (If used)			
Username:		Password:	
Import folder:		Processing Folder:	

(*Specify the import folder structure if it is different to "Inbox". For example: Inbox/ImportFolder)   (**Please create the "DPSImported" folder under "Inbox")

Error folder:	

(***Please create the "DPSError" folder under "Inbox")

- Full read/write access for the email account with password that does not expire and multi-factor authentication disabled.

- Only the ClientID and TennantID are required if delegate permissions are used.

- For authentication, the Username and Password is required, however if application permission is used, the Secret value is required instead of the username and password.

- (*) If the Import folder is different to the Inbox, ensure emails arrive into the folder automatically.

- (**) DocProStar requires the customer to create a processing folder that is used temporarily for processing. Once an email is ingested into DocProStar, the email is moved to a processing folder while it is being classified to its target destination. Emails will be moved from the processing folder to its target destination once it completes processing.

- (***) DocProStar requires the customer to create an error folder to store any emails that can't be processed. Usually, these emails have password protected attachments, or there is a problem with the email.

STEP 2: Specify how you want to classify your emails.

You can classify your emails by three methods: moving them to a subfolder, sending the email to another email address, or forwarding the email into another DocProStar Process (NOTE: Only available within the same environment).

1. Classify emails by moving them to another subfolder.

Type #	Classification Group	Output Target Group (+)	Subfolder name
Example:	*Certificate*	*Insurance*	*Inbox/Insurance*
1			
2			
3			
4			
5			

(+) The Output Target Group is a mailbox folder that must be created under the same shared mailbox.

2. Classify emails by sending them to another email address.

Type #	Classification Group	Output Target Group (+)	Email Address	Subfolder name
Example:	*Resume*	*HR*	*HR@tcgprocess.com*	*Inbox/HR*
1				
2				
3				
4				
5				

(+) The Output Target Group is a mailbox folder that must be created under the same shared mailbox.

3. Classify emails by sending them into another DocProStar process

Type #	Classification Group	Output Target Group	Process Org	Unit	Process Name	Subfolder
Example:	*Invoice*	*Finance*	*TCG*	*Finance*	*Accounts Payable*	
1						
2						
3						

STEP 3: Submit the form for onboarding and setup

Send the form to support.aus@tcgprocess.com with the subject: Email Triage Setup.

Once the form is submitted, you will receive an email notification confirming the setup details. Onboarding and setup will take 5 days. Once setup is completed, you will be sent an email with further instructions to activate the triage.