Email Import Instructions

Note: These steps will assume that setup is happening with a eFileCabinet email address that has 2-factor authentication enabled

Email Setup

1. Login to email account in browser
2. Click Settings cog in top right corner, then "See all settings" button
3. Click on the heading "Forwarding and POP/IMAP"
4. Under the "IMAP access" section click the button next to "Enable IMAP"
5. Return to the inbox of your email and create a new label for email imports. This can be done by:
   - Clicking "Create New Label" in the left hand menu at the bottom of the top section (may need to click "more" before visible)
   - Opening a message in the center pane and then in the top options bar clicking "Move to" (Folder icon with an arrow) and creating a new label in the pop up menu

Note - Email imports act on a first come first serve basis, it is handy to create multiple import labels (Production Imports, Staging Imports, Postgres Imports, etc.) so that existing imports don't interfere with each other.

Google Account Setup

1. Navigate to myaccount.google.com
2. Click "Security" in the left bar
3. In the "Signing in to Google" section, click "App passwords"
4. Follow sign in prompt
5. At the bottom of the box there will be a section to "Select app". Choose other and give it an appropriate name (e.g. Rubex Staging Import)
6. Click "Generate" button
7. A new Generate app password box will appear
8. Copy the 16 character password in the yellow box. This will be the password used when creating your import on Rubex

Rubex Setup

Where to set up Import

Email imports can be set up in two locations - Admin and My Settings. Email Imports created in the Admin tab are account wide, while My Settings imports apply only to that specific user. Testing can (and should) be done separately on both of these locations.

Creating the Import Mapping

1. Navigate to the chosen mapping location and click the "Add New Mapping" button at the bottom of the screen.
2. Select a destination for the emails to import into. If you'd like you can create a new drawer/folder beforehand to have as a clean destination without any other items in it.
3. After selecting a destination you can now set your email settings. For this purpose you'll enter

Username / Email Address	Password	Email Server Address	Email Server Port
yourusername @efilecabinet.com	The 16 character password generated earlier	imap.gmail.com	993

4. Check the "Use SSL" box and click "Test Setting"
5. If all setup has been performed correctly, a popup saying "Test Successful" will appear at the top of the screen
6. Under the email setting box, click the refresh button next to the "Email Folder Path" dropdown
7. After refreshing, choose the created label as your email source. As a suggestion, do not set your primary inbox as your source, or ALL of your emails will be imported and archived/trashed. Instead, create a separate folder in Gmail and set that as your source. That way, you can move emails there that you don't care about without impacting the more useful emails that you may receive.
8. Set your import options (Only emails, only attachments, or both)
9. Either keep imported emails with the Archive setting or have them be automatically deleted after import with Trash
10. Click Create
11. You should be returned to the previous page with your new mapping listed in the center pane

Importing your first emails

From your email browser window, add emails to the label that is set as your email import source. This location is periodically checked by Rubex (every 5 minutes or so) to see if emails are available to be imported.

You can verify that emails have been imported to Rubex if they are no longer listed under the label. Instead they can either be found under the label [imap]/Archive or in the trash depending on the setting you selected for moving imported emails.

Emails will appear in the destination location in Rubex once they have disappeared from the email label.

Troubleshooting

If you're having issues with email imports make sure that you don't have an existing import on any environment that is importing from the same location. Emails will only import to the first environment that grabs them, they won't be duplicated. Good practice is to delete your email import mapping after you are done testing it to prevent confusion in other environments.

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