

This document provides basic information about configuring SMTP/Server Side Emailing for the following services:

- Exchange (On-Premise)
- Exchange (Hosted/O365)
- Google

Exchange (On-Premise)

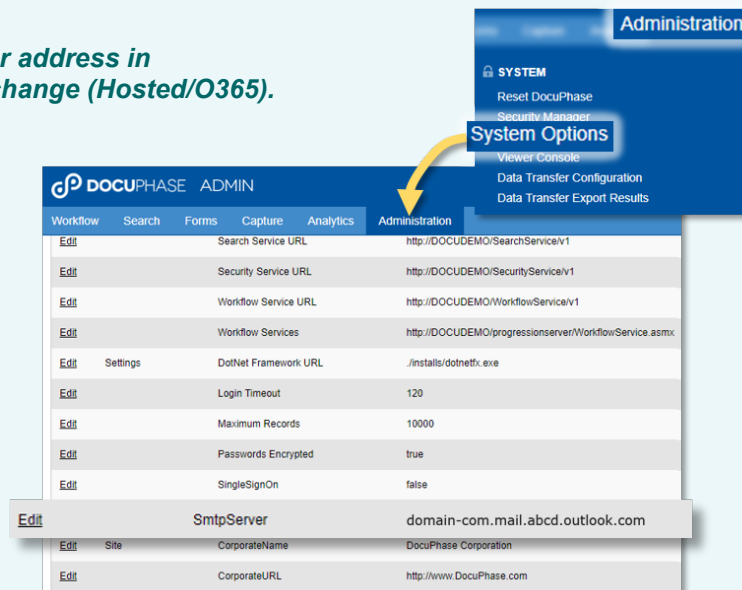
On-Premise Exchange requires anonymous relay to be enabled, and must be actively online for the application server to communicate and transmit emails.

Exchange (Hosted/O365)

Like Hosted Exchange requires a formal connector to build to the DocuPhase application server. Please refer to the following article for details: <https://docs.microsoft.com/en-us/exchange/mail-flow-best-practices/use-connectors-to-configure-mail-flow/set-up-connectors-to-route-mail>

NOTE

Be sure to enter the SMTP server address in DocuPhase when setting up Exchange (Hosted/O365).



DOCUPHASE ADMIN					
Workflow	Search	Forms	Capture	Analytics	Administration
Edit					Search Service URL http://DOCUDEMO/SearchService/v1
Edit					Security Service URL http://DOCUDEMO/SecurityService/v1
Edit					Workflow Service URL http://DOCUDEMO/WorkflowService/v1
Edit					Workflow Services http://DOCUDEMO/progressionserver/WorkflowService.asmx
Edit	Settings				DotNet Framework URL .\installs\dotnetfx.exe
Edit					Login Timeout 120
Edit					Maximum Records 10000
Edit					Passwords Encrypted true
Edit					SingleSignOn false
Edit					SmtpServer domain-com.mail.abcd.outlook.com
Edit	Site				CorporateName DocuPhase Corporation
Edit					CorporateURL http://www.DocuPhase.com

Google

Google Service - Admin Configurations

- 1) Go to: Google Admin ► Security ► Basic Settings and enable the following option:
 - ✓ *Enable the Allow less secure apps: Allow users to manage their access to less secure apps option.*
- 2) Navigate to: Apps > G Suite > Settings for Gmail > Advanced settings and make the following option settings:
 - ✓ *Allow per-user outbound gateways: Allow users to send mail through an external SMTP server when configuring a "from" address hosted outside your email domains.*
 - ✓ *Email whitelist: Add public of AWS app server (i.e., 22.333.444.555)*
 - ✓ *Comprehensive mail storage: Ensure that a copy of all sent and received mail is stored in associated users' mailboxes*
 - ✓ *Enable SMTP relay:*

SMTP relay service Locally applied	SMTP RELAY TEST Allowed senders: Only addresses in my domains Only accept mail from the specified IP addresses: No Require SMTP Authentication: Yes Require TLS encryption: Yes
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Google Service - Server Side Configurations

A) Add IIS6 Console and SMTP role/features on hosted server, as shown below:

TIP
 Review the following video:
https://www.youtube.com/watch?v=9Q4S_6pmPoA

- ▾ Management Tools (0 of 7 installed)
 - IIS Management Console (Installed)
- ▾ IIS 6 Management Compatibility (Installed)
 - IIS 6 Metabase Compatibility (Installed)
 - IIS 6 Management Console (Installed)
 - IIS 6 Scripting Tools (Installed)
 - IIS 6 WMI Compatibility (Installed)
- IIS Management Scripts and Tools (Installed)
- Management Service

- Remote Server Administration Tools (1 of 40 installed)
 - RPC over HTTP Proxy
 - Simple TCP/IP Services
 - SMB 1.0/CIFS File Sharing Support (Installed)
 - SMB Bandwidth Limit
 - SMTP Server (Installed)
 - SNMP Service
 - Telnet Client
 - Telnet Server

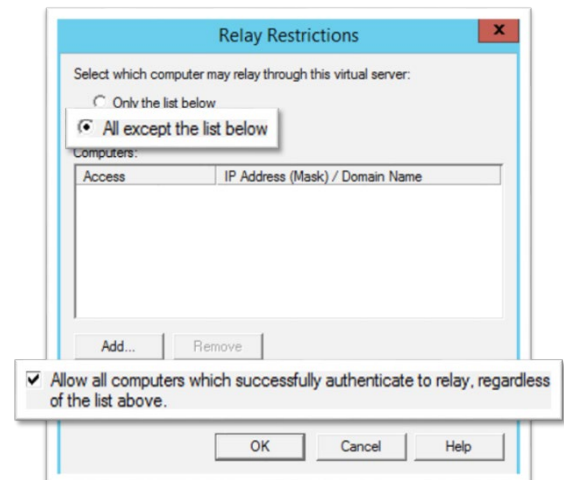
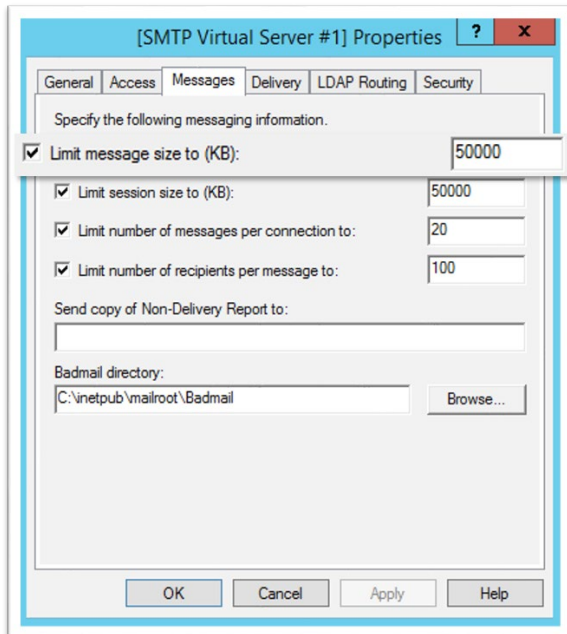
Google Service (continued on next page)

Google Service (continued)

B) Configure SMTP Virtual Server.

Under the Access tab:

- 1) Click **Relay** to display the **Relay Restrictions** dialog.
- 2) Enable the settings as shown here (right), then click **OK**.



Under the Messages tab:

- 3) Increase email size limits to 50MB, then click **Apply**.

Under the Delivery tab:

- 4) Click on **Outbound Security** to display the corresponding dialog.

On the Outbound Security dialog:

- 5) Enable the Basic authentication option.
- 6) Enter your G-Suite e email address and password, then click **OK**.
- 7) Click on **Outbound Connections** to display the corresponding dialog.

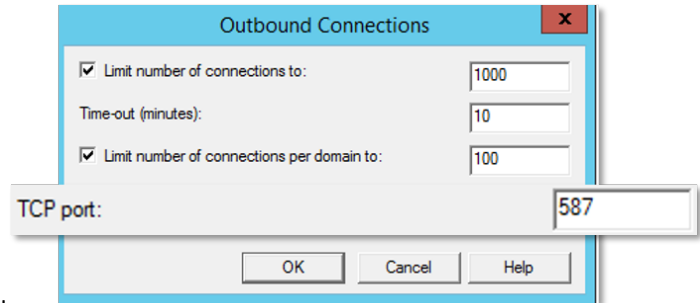


Google Service (continued on next page)

Google Service (continued)

On the Outbound Connections dialog:

- 8) Enter the TCP port value as **587**, then click **OK**.
- 9) Click on **Advanced** to display the corresponding dialog.



On the Advanced Delivery dialog:

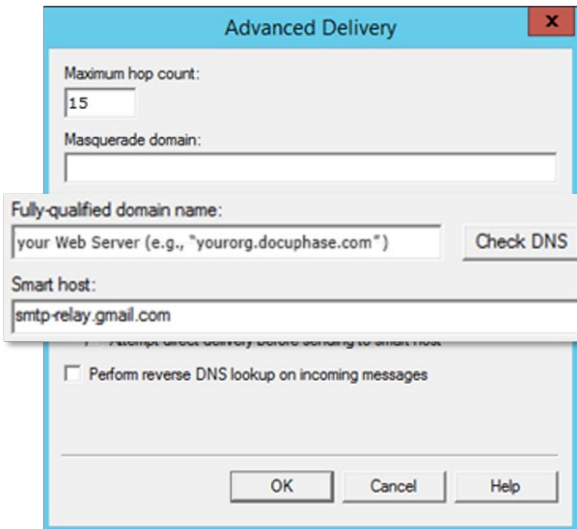
- 10) Enter the local machine name as the Fully-qualified domain name.

IMPORTANT!

The information entered as the Fully Qualified Domain Name depends on whether or not SSL is enabled:

- If **SSL enabled**, then use the Fully qualified Domain Name of the Web Server (generally the URL minus the protocol and DocuPhase subpage).*
- If **SSL is NOT enabled**, then use the actual local Machine Name of the web server.

**The example shown here, applies to systems with SSL enabled*



- 11) Enter the SMTP Relay Address as the Smart host, then click **OK**.

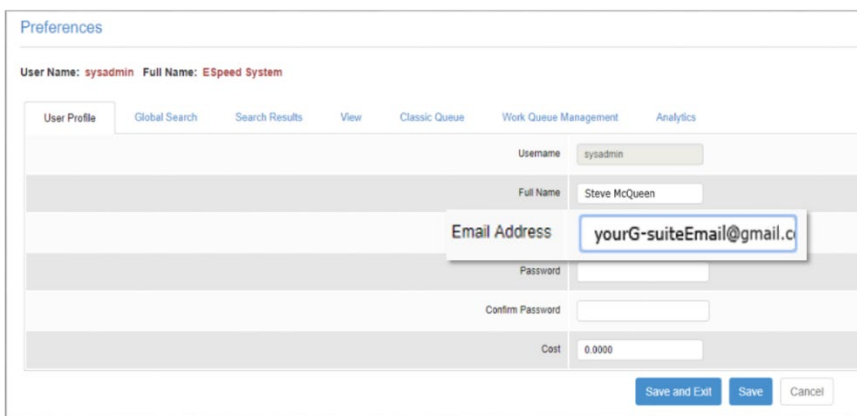
On the local drive:

- 12) Go to SSMS ► DocuPhase ► Config Table.

In the Config Table (see step 12 above):

- 13) Enter the SmtphServer address as the machine name as (see step 10 above).

ConfigID	ConfigName	ConfigType	ConfigData	ConfigGroup
1	Maximum Records		10000	Settings
2	Source Path	Path	\\XYZ-APPSVR\Incoming\	Paths
3	Repository Path	Path	\\XYZ-APPSVR\Repository\	Paths
4	Image Viewer		Control	Options
5	Login Timeout		180	Settings
6	CorporateURL		https://docs.google.com/document/d/12ABcDe3FGHIJKSLMnOPQRS6uv7WXyzabCDe-8FGH/edit?usp=sharing	Site
7	CorporateName		DocuPhase Corporation	Site
14	Document Servers	Service	https://yourorg.docuphase.com/DocumentServer/DocumentService.aspx	Services
15	License Servers	Service	https://yourorg.docuphase.com/LicenseServer/LicenseService.aspx	Services
16	Passwords Encrypted		true	Settings
17	DotNet Framework URL		./install/dotnetfx.exe	Settings
18	FullText Schedule		0.24	Options
19	SmtphServer	Mail	Enter the Fully Qualified Domain Name of your Web Server (e.g., "yourorg.docuphase.com")	
20	Data Services	Service	https://yourorg.docuphase.com/ApplicationServer/DataService.aspx	Services
21	Designer Services	Service	https://yourorg.docuphase.com/progressionserver/DesignerService.aspx	Services
22	Workflow Services	Service	https://yourorg.docuphase.com/progressionserver/WorkflowService.aspx	Services
24	Application Servers	Service	https://yourorg.docuphase.com/DocuPhase	Services
26	SingleSignOn	NULL	true	Settings
28	Progression	Workflow	true	Options



On the User Profile tab on the User Preferences (⚙️) screen in DocuPhase:

- 14) Change the email address of sender (e.g., sysadmin) to the appropriate G-Suite email address (see step 6 above).