

# DbMail user and administrator guide

Document Management & Imaging



This document describes the DbMail software. Part of the Version One document management suite – award-winning paperless office solutions.

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# Introduction

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## Version One document management suite

**Overview:** the document management suite provides scanning and document management facilities for electronic handling of paper documents. It can be used to automate and simplify your:

- sales document cycle (order to cash)
- purchasing cycle (purchase to pay)
- other archiving requirements (HR documents, technical documents, etc).

These solutions save significant amounts of time, money and storage space. Typical documents:

- sales order invoices
- purchase orders
- statements.



Software installation is normally handled by Version One, or another specialist, and is not covered in this help.

The Version One document management suite is a comprehensive collection of software tools to automate document processes within their core application environments. Using the software you can replace paper-based processes with electronic procedures, eliminating printing, posting and manual filing.

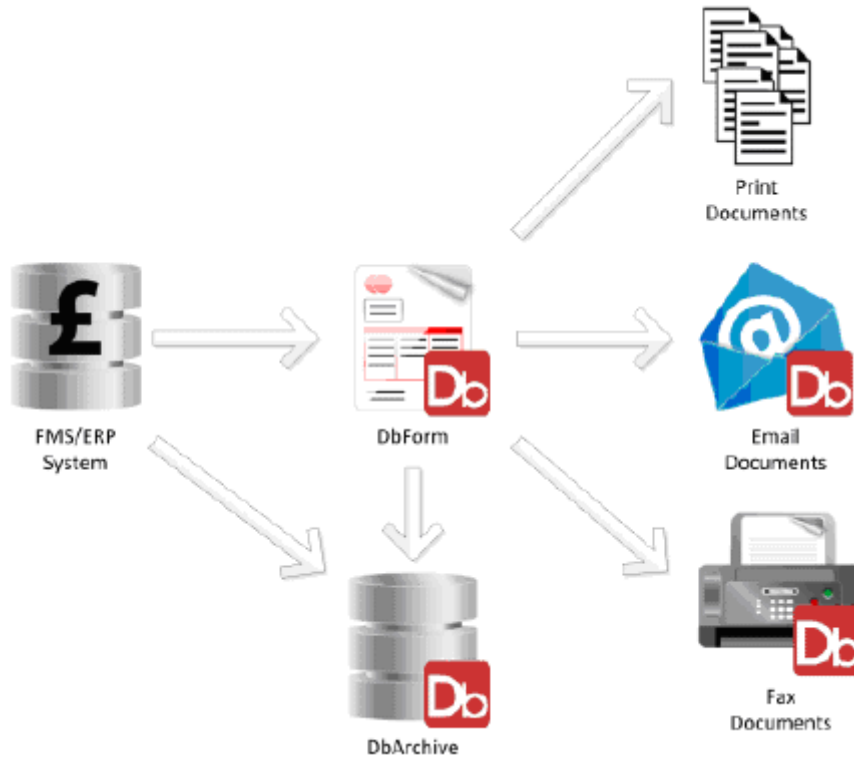


There are many different ways of configuring and using the software, using different combinations of the core product set. You may not have the complete applications suite installed.

The document management suite is made up of a number of integrated application modules that work together to give the desired functionality. These applications are broken down into the following areas:

### **Document creation and distribution**

Documents based on data from core systems may be formatted as professional output documents which can then be printed, faxed, emailed and archived based on defined business rules.



Several applications support these processes:

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**Application Description**

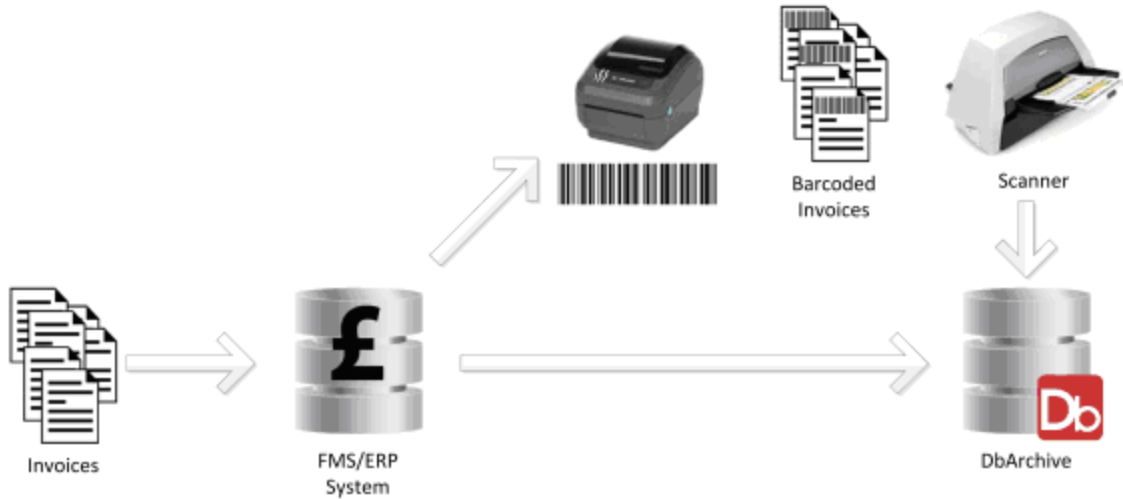
---

DbForm	Document formatting and business rules management
DbFax	Sending documents by fax
<a href="#">DbMail</a>	Sending documents by email
DbArchive	Archiving outbound documents.

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**Document scanning and archiving**

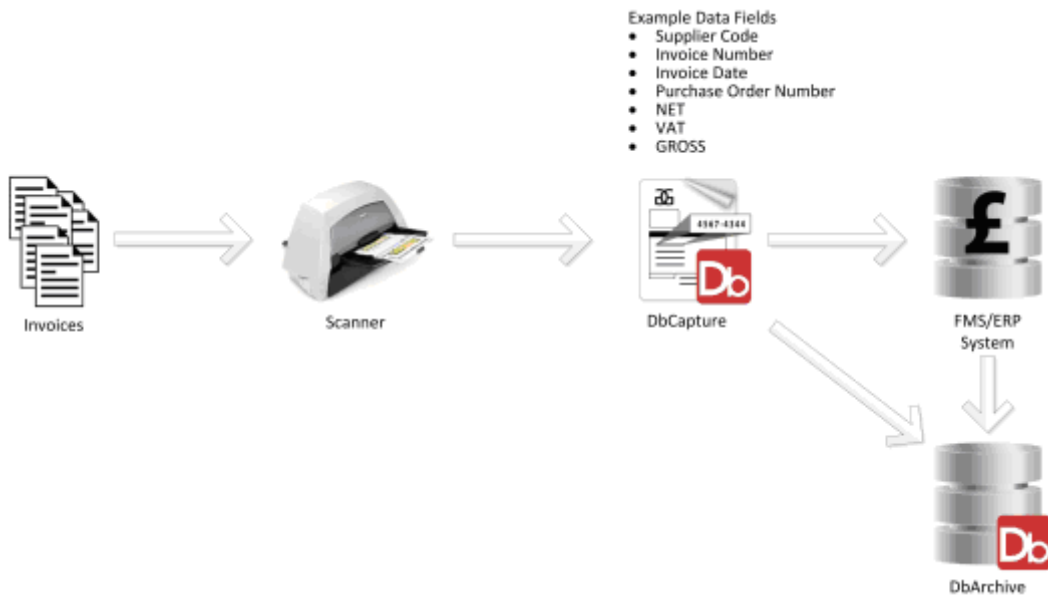
Incoming paper documents such as invoices and orders may be scanned and stored for easy access and for statutory purposes (eg to comply with UK HMRC legislation). The basic process makes use of barcoding techniques for document separation and recognition.



The application supporting document scanning and retrieval is DbArchive.

### Document data capture

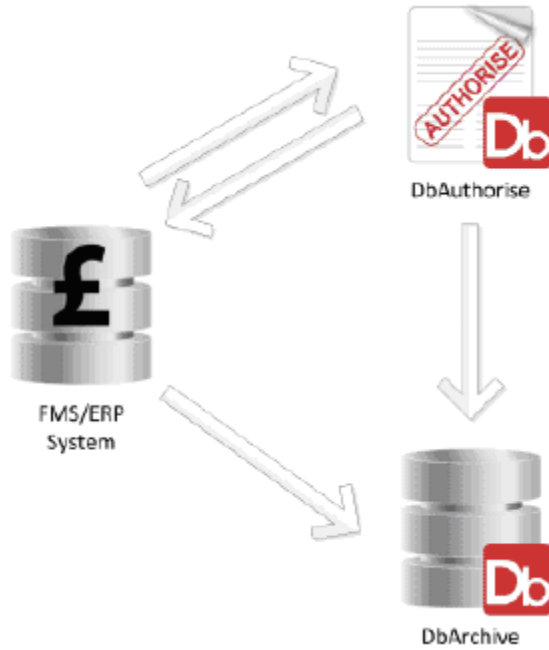
This process typically involves scanned documents such as purchase invoices. The document data can be intelligently captured using OCR technology and validated, so transactions can be automatically posted to the core finance system.



The application supporting intelligent data capture and transaction posting is DbCapture.

### Document authorisation

This process typically involves documents such as purchase invoices captured using DbCapture and now requiring coding and approval for payment.



The application supporting document routing and authorisation is DbAuthorise.

### The document management suite applications and client tools

The following applications and associated client tools are available as part of the Version One Document Management suite:

Application	Client tool	Description
DbLogin	DbLogin admin console	The master utility for managing the Version One Document Management suite and who has access to it.
	Green meter console	Shows the environmental benefits from using the suite.
DbForm	DbForm GUI designer	Design the format of the outgoing documents.
DbFax	DbFax client	Manage the DbFax system. Create and send faxes from a client PC.
<a href="#">DbMail</a>	<a href="#">DbMail admin client</a>	Manage the DbMail system.
DbArchive	DbConsole	Configure the Tables and Access Levels available within the DbArchive system. Manage the DbArchive system.
	BLOB type manager	Configure new document formats on DbArchive systems using the Native Documents Option.
	Failed deposits manager	Deal with documents that have failed to deposit correctly into DbArchive.
	DbQuery	Document search and viewing facilities based on the user's designated access rights.

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	DbWebQuery	The web based alternative to DbQuery for document search and retrieval.
	DbWebRetrieve	Additional functionality to DbWebQuery, providing better searching and enhanced usability.
	Index manager	Amend the search data values for stored documents and copy or move documents between DbArchive tables.
	DbDeposit	Store ad-hoc documents, which exist already directly into the archive.
	DbScanner	Scan documents for storage in DbArchive and optional intelligent data capture within DbCapture.
DbArchive export	Export documents from DbScanner into DbArchive	
DbCapture	DbCapture export	Export documents from DbScanner into DbCapture
	DbCapture admin	Manage the queue of documents being processed within DbCapture
	DbCapture interactive client	Process individual documents within DbCapture and to create templates for new document formats.
DbAuthorise	DbAuthorise client	Coding and approval of documents within DbAuthorise. Manage the Routing Rules and other management tasks.

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Customisation: Some applications may not be installed on your system, depending on your license, any packages you are interfacing with (eg Accounts) and choices made during installation. You may have modules embedded in a parent application, so you would not necessarily see them branded as Version One.

**See also:**

[Using the Version One document management suite](#) more on using the applications

[Using help](#) more about using this help

[Using the windows](#) general conventions for working with data in the software.

## Using the document management suite

**Overview:** the Version One document management suite has a number of common features. This topic outlines some of the common functions used across the product family.

### Before you log in

To log in to the Version One document management suite you need the following:

- the software must be installed on your PC or laptop
- user name — your system administrator should have created this for you. This is your identity on the Version One document management suite
- password — your system administrator should have created this. If you are not using Windows authentication you can change this once you log in to the Version One document management suite.



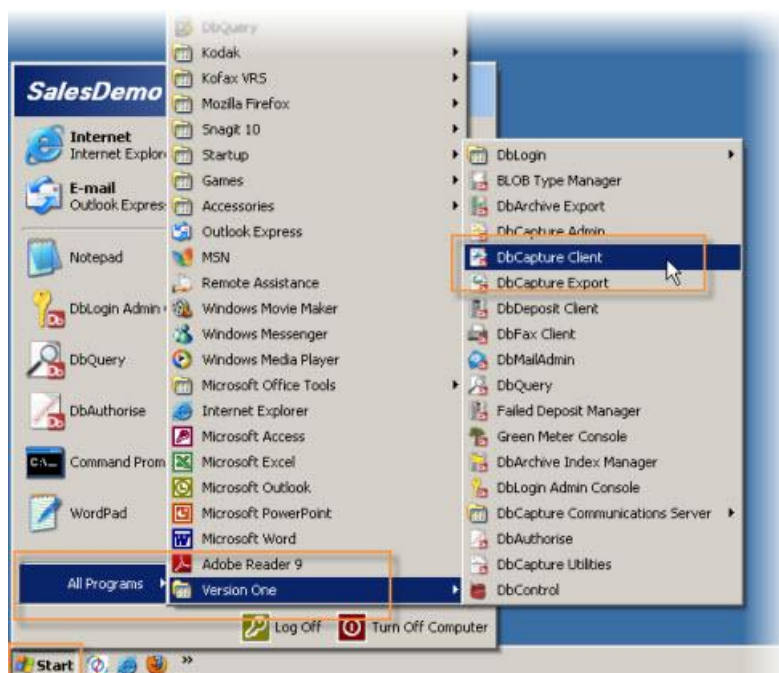
Customisation: Your system may be using Windows authentication to log in to the document management suite automatically. If so, the [DbLogin window](#) is not displayed. Using Windows authentication allows you to use your regular PC logon to access the software without an additional logon.

### The login window

Once the Version One document management suite has been installed, there are several ways for you to display the [DbLogin window](#).

#### Programs menu option

Version One is displayed in the list of programs on your computer. Click **Start > All Programs > Version One > [Program Name]**. For example:



### Recently used menu option

Once you have used the Version One document management suite it may be displayed in your Recently Used menu above the Start button. You can also use this to start the program.



### Desktop shortcut option

You can drag and drop the link to your Version One document management suite program from one of the menu options onto your desktop. Click the mouse, hold the button down, drag to the desktop and release the mouse button.



You can then click this desktop shortcut to start the program.

### Customising windows

Many of the windows in the document management suite can be configured to suit your preferences, eg:

- Dragging and dropping columns to change the order they are displayed
- Hiding some columns
- Sorting columns by various filters.



Customisation: Once a screen has been changed, the system uses the new layout until you reset it to the original layout. Example screenshots shown in this help therefore might not exactly match what you see on your system.

### Toolbars

There are a number of common icons used throughout the system. As you become familiar with the toolbar icons and their use in different contexts, their use should become intuitive. The common Help menu functions like change user, environment, language and password are described in [Help About](#).



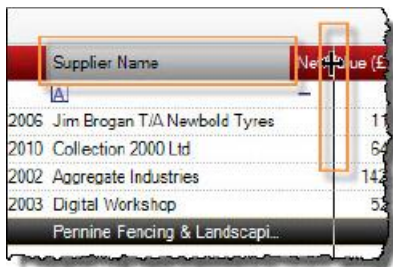
The options available depend on your particular document management suite configuration.

## Using the windows

In many places within the software you can customise the display to change the way document results are shown. For example sizing, sorting and moving columns. You can also filter columns with search, run complex searches across columns, use the date picker and choose the fields you want to display.

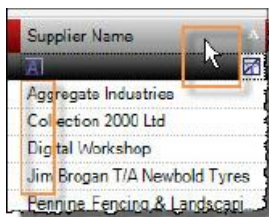
### Sizing columns

You can change the size of columns by clicking and dragging. Here we are making Supplier Name wider to show the full name.



### Sorting columns

You can sort the data by clicking on a column heading. Here clicking the Supplier Name column shows documents sorted alphabetically by supplier.



Click the column header again to sort the column in reverse order.

### Moving columns

You can customise the column layout by clicking and dragging the column header to a new location. Here we are dragging Supplier Name to the left.



### Filtering columns with search

Many columns in the software have a search filter used to narrow the results shown. Here we are filtering Supplier Name to show suppliers beginning with 'agg'.



### Clearing your search criteria

Clear the search criteria by clicking the small cross alongside the search term:



### Date picker

Use the date picker to search for documents for a particular date:



### Complex searches

More complex search queries are available for some fields. Click the drop-down arrow to choose a search type and add your criteria:



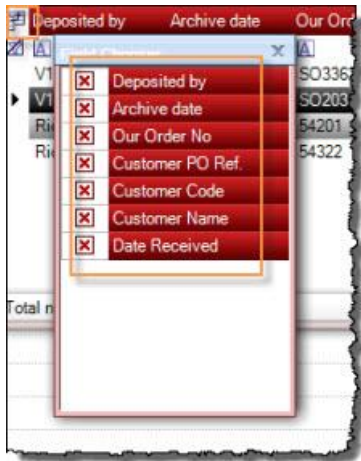
### Clearing multiple search criteria


Some windows allow you to clear all your search criteria at once by clicking a button:



### Choosing fields

Some windows allow you to choose which fields to display. Click the icon to show the available fields and mark the ones you want with a cross:



 Try out the layout options to get the display how you want it. You are only changing the way information is shown, not changing the data. Some windows can't be customised.

## Using help

When you first open help the introduction page is shown, along with navigation tabs (Contents, Index and Search) to find more topics.

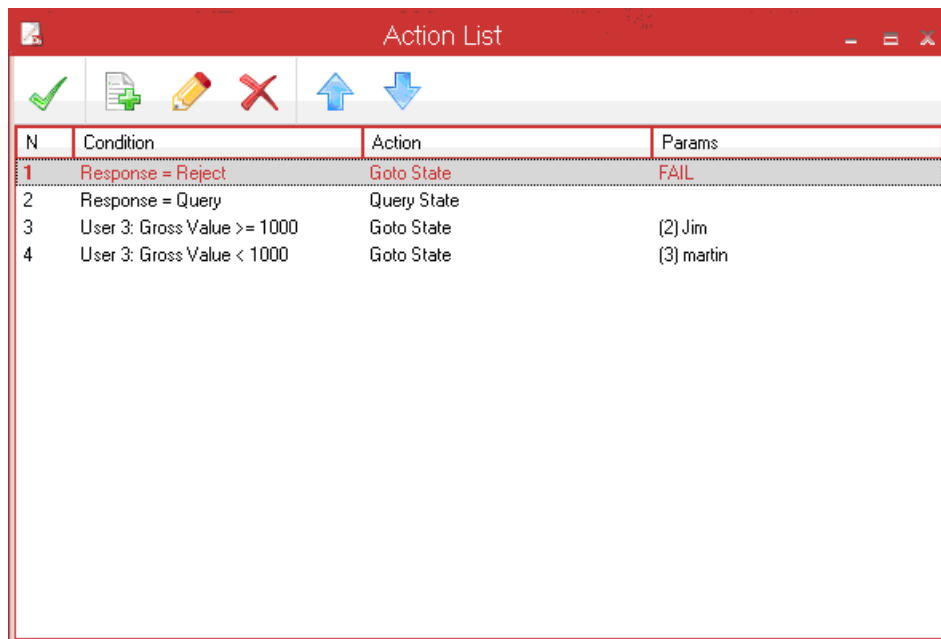
### Links and how they work

Throughout help, you will see links such as [Links and how they work](#). Holding the mouse over a link changes the cursor to a pointer . Click for one of the following:


- more text
- new window opens (click anywhere to close)
- another help topic (use the Back button to return to the original topic).

### Screen shots

Sample screen shots are shown where they help clarify the topic. To save space and keep the help briefer, they are often shown in drop-down links like this: [Show/hide screen](#). Click the link to **show the graphic**. Click again to **hide the graphic**.



N	Condition	Action	Params
1	Response = Reject	Goto State	FAIL
2	Response = Query	Query State	
3	User 3: Gross Value >= 1000	Goto State	(2) Jim
4	User 3: Gross Value < 1000	Goto State	(3) martin

 Some screenshots are mock-ups of real data, made anonymous by blurring key information. Any resemblance to real companies does not imply an endorsement of the software or an active trading relationship between companies.

### The icons

These icons help you use the help more effectively.

Icon	Description
------	-------------



Hide the navigation and glossary panel.

Hide



Show the navigation and glossary panel.

Show



Go back through the topics you have looked at.

Back



Go forward through the topics you have looked at.

Forward



Print the current topic.

Print

---



## Finding a help topic

You can find the help you need several ways:

- contents
- index
- searching the text.

### Search the contents

Searches the **Contents** and **Topics** (like chapters and sections in a book):

1. Click Contents.
2. Click one of the Books 
3. Click a Topic  to show the content on the right.

### Search the index

Searches the predefined entries in the **Index** (like the index of a book):

1. Click **Index**.
2. Type your search term.
3. Click an index word to show the topic.



Help does a best match against your term. For example: if the index contains both 'Hidden' and 'Hiding' and you search for 'Hid', 'Hidden' is highlighted as the first word containing that string. If you type 'Hidi', 'Hiding' is highlighted ('Hidden' no longer matches the string). Try synonyms for what you are looking for, eg 'house', 'dwelling', 'residence'.

### Search the text

This method searches all the text in the help (like searching the text of a book):

1. Click **Search**.

2. Type the word you are searching for.
3. Click **Go**.
4. All topics containing the search word are listed.
5. Click the topic you want.

## **Glossary**

Some of the terms used in the help are defined in brief glossary entries. These are self-contained descriptions and don't link anywhere else.

## Accessing the applications — logging in

**Overview:** a login window is displayed when you click a Document Management suite icon. The same style of login window is used for all applications. This is where you enter your login username and password.



Field	Description								
Username	Enter your user name. This may be your Version One user name or your Windows user name, depending on the option you select in the Log on using field.								
Password	Enter the Version One or Windows password for the user name you entered.								
Log on using	Select how you want to log on to the Version One Document Management suite:								
	<table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Windows</td> <td>Windows Authentication attempts an Active Directory (AD) User Password login — specify your Windows password to validate against Active Directory.</td> </tr> <tr> <td>Internal DbLogin</td> <td>Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.</td> </tr> <tr> <td>Current Windows user</td> <td>Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading</td> </tr> </tbody> </table>	Option	Description	Windows	Windows Authentication attempts an Active Directory (AD) User Password login — specify your Windows password to validate against Active Directory.	Internal DbLogin	Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.	Current Windows user	Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading
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Internal DbLogin	Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.								
Current Windows user	Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading								

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a client application. Doesn't require a password.

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Validation of Windows login with Active Directory (AD) uses a secure socket (ssl) connection from the DbLogin server to Active Directory. If this fails, Windows login is not possible (other than the basic AD login as the current Windows user). AD user verification from the server is only supported from the Windows DbLogin server, not the Unix versions.

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The application version number is shown for information — you'll need this information if you contact your support team with a query.

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### Button Description

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OK      Log in using the details entered.

Cancel    Exit without logging in.

---

After validating the login any DbLogin password rules are applied, eg prompting you to update your password. After a successful login, DbLogin applies the default environment (normally 'Live', unless configured otherwise) and checks:

- the user has access to their default environment
- the application being loaded is present in the default environment
- valid CAL access can be granted.



Any failure prevents access to the client application.

### DbLogin admin console

Login administration is covered in a separate topic for **system administrators only**.

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## Securing your data

**Overview:** you need to make sure that your data is securely backed up in case of problems. A secure backup policy is crucial to any IT system. The details of your backup policy is beyond the scope of this help, and not covered by the document management suite or Version One project management. These notes are for general guidance only.



This topic is for **system administrators only**.

The document management suite is a client-server application with components running on both a central server and client PCs.

### Server

Back up the entire folder:

```
d:\versionone\
```

### Scan station

If you have the ability to clone a machine, make an image of the scan station. Otherwise you should backup:

```
c:\versionone\
```

```
c:\Program Files\Version One
```



These folder names assume your software has been installed in the default locations. Backup up your own installation folders if different from those above.

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## About us

### Getting in touch

This software is from Version One Ltd. If you have any comments on this help or suggestions for improvements, please get in touch. You can email [info@versionone.co.uk](mailto:info@versionone.co.uk). We're happy to hear from you.

### Problems and queries

If you have a query on using the software you should get in touch with your support contact. In many cases your software comes from a third-party, who is normally your first point of contact for queries.



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## Help about

**Overview:** each of the applications has a Help About window displaying information about the version of the application you are using. Click Help > About [application name], eg Help > About DbQuery to display the About DbQuery window.



You will need the version number if you contact your support team with a query.

Click OK to close the window.

### Standard toolbar options

Many of the applications have standard toolbar buttons with frequently-used functions. The same functions are also on the Help menu:

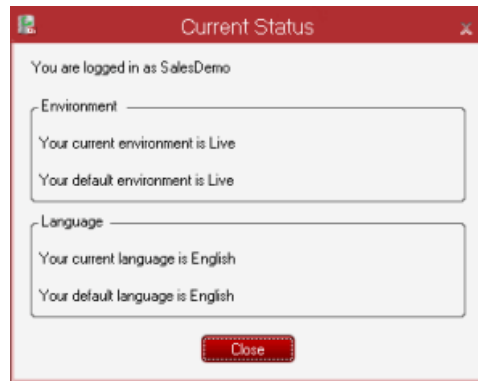


Shows the Help About window.



Use the drop-down to change your system configuration.

Option	Notes
Current status	Use this to check the current status of the environment and language settings.



Change environment

You can have multiple environments, eg Live and Test. Choose the environment from the drop-down box. You can also choose to make this environment the default using the checkbox.



Change user

Change the current user to a different login. Add the username and password for the new user in the Change User window.



Change password

Change the login password for a user.



Change language

Choose from the languages installed on your system or use the Windows system default.



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# DbMail

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## About DbMail

**Overview:** used to automatically generate and send emails from your business applications. For example, send remittance advices directly to your suppliers via email, instead of having to print, fax or post them. This can give considerable savings in time and money.

DBMail comprises two components:

1. DbMailSend, running on a network server and processing email requests directly from your business application
2. DbMailAdmin, running on a Windows PC and enabling you to monitor and manage emails sent by DbMailSend.

DbMailSend is integrated with your application system and not visible to users. It generates emails from your application and delivers them to your mail server to send out either within your network or across the internet.

You can either run both DbMailSend and DbMailAdmin on a single PC or on two separate machines on your network.

## How DbMail works

### DbMailSend

The DbMailSend component of DbMail can be run in one of two ways:

- Directly from the business application it is integrated with, eg your accounts package
- From the command line of the Windows PC it is installed on.



The command line method is useful for investigating problems and testing the system.

DbMailSend generates the required email messages and passes the email requests to a mail server, such as Microsoft Exchange (Windows) or sendmail (Unix). Emails are then delivered via the internet or your network.

You can choose one of the following mail server protocols to communicate your emails to the mail server:

- SMTP (Simple Mail Transfer Protocol)
- MAPI (Messaging Application Program Interface).

If you are permanently connected to the internet, your emails are transmitted immediately. If you have a dial-up connection, emails are queued by the mail server until the Internet Service Provider (ISP) is next contacted.

### DbMail log file

When an email is sent through DbMailSend a record is added to a DbMail log file. Each log file record contains details of:

- date and time sent
- sender

- addressee
- any problems delivering mail to the server.

You can load the DbMail log files into DbMailAdmin to inspect and archive them. This displays whether your emails were successfully delivered to the mail server and lets you view information about any problems and the email contents.

#### **Other DbMailSend functions**

In addition to sending each email message to the recipients defined in your business application you can also configure DbMailSend to do the following:

- Generate a report email for an Administrator. This contains the log file record corresponding to the email.
- Run a batch file (confirmation script). For example, this could display a message on the machine that runs DbMailSend to confirm that the email was sent.

You can use DbMailAdmin to configure DbMailSend from your desktop.

#### **DbMail hardware configurations**

You can run DbMail using one of the following hardware configurations:

- A single Windows server. This can be used both to generate the emails and to administer them afterwards, ie, DbMailSend and DbMailAdmin both on the same machine.
- Two different Windows machines on your network. The two machines are be used to generate the emails and to administer them, ie DbMailSend and DbMailAdmin on separate Windows servers.
- A Unix server to generate the emails and a networked Windows machine to administer them afterwards, ie DbMailSend on a Unix server and DbMailAdmin on a Windows machine.



Both DbMail components run under Windows 95, 98, NT, XP, 2000, or Windows 7.

#### **Mail server communications protocols**

You can choose to use one of the following mail server protocols for communications between DbMailSend and the mail server:

- SMTP — the open source protocol is used to communicate between mail servers and the internet.
- MAPI — the protocol used by Microsoft Outlook to communicate with Microsoft Exchange.

We normally recommend SMTP for DbMailSend for both Windows or Unix servers. MAPI is only supported in Windows machines. SMTP allows the mail sender's name to be specified for each message, whereas using MAPI all messages are sent by default from the email account of the current user.

If you are using Microsoft Exchange as your mail server you can configure it to accept SMTP messages only from the specific machine on your network running DbMailSend. This enables you to use the SMTP protocol for DbMail whilst avoiding the possibility of unauthorised email relaying using your Exchange server.

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## DbMail overview

**Overview:** once DbMail has been installed on your system you need to configure both DbMailSend and DbMailAdmin. These topics are for **system administrators only**.

The DbMailSend configuration file, `dbmail.ini` contains the settings needed to run DbMailSend, eg which protocol you want to use to deliver messages to your mail server, how you want to report emails sent, and so on.

You can either [edit dbmail.ini using a text editor](#) or use DbMailAdmin to enter the information and select options. Before you can do this, you need to have configured DbMailAdmin for your hardware configuration and told it where to find `dbmail.ini` and the DbMail log file.



You can run DbMailSend so all emails are sent to a single email address — this is called demonstration mode.

### Program shortcut

We recommend creating a shortcut to DbMailAdmin program on your desktop. You can then double-click this to run DbMailAdmin and configure DbMail.

### Configuring DbMail

These are the procedures you need to setup:

1. [Setting up the DbMail configuration file](#)
2. [Configuring DbMailAdmin](#)
3. [DbMail configuration — reporting tab](#)
4. [DbMail configuration — SMTP information](#)
5. [DbMail configuration — MAPI information](#)
6. [DbMail configuration — notify tab](#)

## Configuring DbMail for use

**Overview:** DbMailAdmin is the administration component of DbMail used to enter the information and select the options needed to run DbMail how you want.

### Starting DbMailAdmin

Start DbMailAdmin by double-clicking the icon on your desktop or choosing it from your Windows Start menu. The DbMailAdmin Configuration window is shown the first time you run DbMailAdmin. You are prompted to enter the following information about your installation:

- hardware configuration you are using for DbMail
- location of the DbMailSend configuration file, dbmail.ini
- location of the log file used to store information about emails sent through DbMail.




These details are stored in the Windows registry of the PC running DbMailAdmin.

### DbMailAdmin configuration window

You configure DbMailAdmin using the DbMailAdmin Configuration window:

- Click the Configure icon in the DbMailAdmin window
- Click the Configure menu and click Configure DbMailAdmin.

### Step by step

1. Start DbMailAdmin by double-clicking the icon on your desktop or selecting it from your Windows Start menu. If this is the first time you have run DbMailAdmin the DbMailAdmin Configuration window is shown.
2. If the window is not displayed, click  from DbMail or choose DbMailAdmin from the Configure menu.
3. Specify the hardware configuration you are using for DbMail (options in the table below).

4. Specify the location of the `dbmail.ini` configuration file (notes below).
5. Specify the location of the `dbmail.log` log file (notes below).
6. Click OK.

### Fields

Specify the hardware configuration you are using for DbMail:

Field	Description	
DbMail location	Select the DbMail Location:	
	<b>Field</b>	<b>Description</b>
	Local	To generate and administer your DbMail emails on the same Windows server, that is, run DbMailSend and DbMailAdmin on the same machine.
	Windows	You must enter your server name. To use two different Windows machines on your network to generate the emails and to administer them, ie DbMailSend and DbMailAdmin on separate Windows servers.
Unix server	To generate the emails on a Unix server and administer them using a networked Windows machine, ie run DbMailSend on a Unix server and DbMailAdmin on a Windows PC.  You must enter your server name and the logon details that DbMailAdmin can use to access the DbMail log file.	
Server name	Enter the server name relevant to the DbMail Location:	
	<b>DbMail Location</b>	<b>Description</b>
	Windows	The server name or a local drive letter that has been mapped on the DbMailAdmin machine to the server hard disk.
Unix server	The server name or IP address.	
Username	Enter the user name that DbMailAdmin can use to access the DbMail log file on the Unix server.	
Password	Enter the corresponding password that DbMailAdmin can use to access the log file.	
DbMail INI file location	Enter the location of the DbMail configuration file, <code>dbmail.ini</code> . For example: <code>C:\WINNT\dbmail.ini</code> , <code>\dbmail.ini</code> or <code>/usr/dbmail/dbmail.ini</code> .	

If you are running DbMailSend and DbMailAdmin on the same PC, the DbMail configuration file is in the PC's Windows directory, that is, `C:\WINNT` on a Windows 2000 or Windows NT, `C:\Windows` on a Windows 95/98 machine and, for XP, in the Windows directory of the user who installed DbMail.

If you are using separate Windows machines for DbMailSend and DbMailAdmin then `dbmail.ini` is stored in the DbMailSend server's Windows directory. If you can access the DbMail configuration file using `\\AdminServer\WINNT\DBMAIL.INI`, you would put `\\AdminServer` in the Server Name field and `\WINNT\DBMAIL.INI` in the DbMail .INI File Location field. Alternatively if you have mapped the S: drive on your desktop to the WINNT directory of your server then you would put `s:` in the Server Name field and `DBMAIL.INI` in the DbMail .INI File Location field.

If you are using a Unix server for DbMailSend, you must tell DbMailAdmin that `dbmail.ini` is stored on the Unix server. You can either specify an absolute path such as `/usr/dbmail/dbmail.ini`, or specify where it is relative to the home directory of the user whose Username and Password you entered.

When you first configure DbMailAdmin, selecting the server type fills in a default value for the DbMail .INI File Location. If you want to return to the default value, reselect the DbMail Location setting.

**DbMail log file location** Enter the location of the DbMail log file, `dbmail.log`. You can either:

- Type the filename and path of the log file.
- Click the Load from INI button and edit the value loaded, if required.

If you are running DbMailSend and DbMailAdmin on the same PC, enter the path to the file. For example, `C:\DBMAIL\DBMAIL.LOG`.

If you are running DbMailSend and DbMailAdmin on separate Windows machines, enter the path relative to the Server Name field. For example: if you entered `'S:'` in the Server Name field and the log file is stored in `S:\DBMAIL\DBMAIL.LOG`, enter `\DBMAIL\DBMAIL.LOG` in the DbMail Log File Location field.

If you are using a Unix server for DbMailSend, enter either an absolute path or a relative path from the user's home directory.

The path specified must be from the machine that DbMailAdmin runs on, rather than the path from the DbMailSend server. For example: if you are using separate Windows machines for DbMailSend and DbMailAdmin the log file path from `dbmail.ini` may be `C:\PROGRAMS\DBMAIL\DBMAIL.LOG`, whereas if you have mapped the S: drive on your desktop to the `C:\PROGRAMS` directory of your server then you would enter `'S:'` in the Server Name field and `\DBMAIL\DBMAIL.LOG` in the DbMail Log File Location field.

---

<b>Button</b>	<b>Description</b>
OK	Save the DbMailAdmin details
Cancel	Exit without saving the DbMailAdmin details
Edit INI file	Edit <a href="#">the DbMail configuration file</a>
Load from INI	Load the Log file location from the INI file.

---



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View	View detail	Display the details of a log file entry.
	Toolbar	Show or hide the menu toolbar.
	Status bar	Show or hide the status bar.
Configure	Configure DbMailAdmin	<a href="#">Configure the server details</a> for DbMail Admin.
	Edit DbMail admin	Configure the DbMail configuration file, <code>dbmail.ini</code>
Help	Options for Change Environment, User, Password and Language	Standard functions, available in a number of applications. See <a href="#">Help About</a> .

---



Most of these menu functions also have their own toolbar button.

## Setting up the DbMail configuration file

**Overview:** the configuration for DbMail is stored in the DbMail configuration file, dbmail.ini. This is a text file that you can either create and update using a text editor or using DbMailAdmin's user interface. The dbmail.ini file contains the following four sections:

Section	Contents
<a href="#">General</a>	The basic operation of DbMail, specifying whether you use <a href="#">SMTP</a> or <a href="#">MAPI</a> for communications with the mail server. The General section contains the <a href="#">DefaultNotify</a> setting.
<a href="#">Reporting</a>	Options to use for reporting the status of the email messages handled.
<a href="#">SMTP</a>	Details needed for delivering emails by SMTP.
<a href="#">MAPI</a>	Details needed for delivering by MAPI.
<a href="#">Notify</a>	Details of email notifications requested.



Each section of the .ini file corresponds to a tab section of the DbMail Properties window.

### DbMail properties window

When editing the configuration file using DbMailAdmin the different sections of the dbmail.ini file are updated using several tabs in the DbMail Properties window. To display the DbMail Properties window, in DbMailAdmin:

- choose **Edit DbMail INI File** from the Configure menu
- or click the Configure icon, then click **Edit INI File**.

This displays the DbMail Properties window with the [General tab](#) open.

### Step-by-step summary

The steps needed to configure the general tab (for more detail see the [individual tab sections](#)). Display the DbMailAdmin DbMail Properties window:

- in DbMailAdmin click the Configure menu and choose Edit DbMail INI file
- click the detail icon in the DbMailAdmin window
- click Edit INI File in the DbMailAdmin Configuration window.

Quick summary:

1. Specify the protocol you want to use to deliver emails to your mail server.
2. Specify where notification emails are sent, to report any problems encountered delivering email to the mail server.

3. Specify the email address from which emails appear to come, if different from the currently logged in user.
4. Specify the email address to which replies are be sent, if different from the sender address.
5. Specify the location of a DbMail Address Book if you want to look up email addresses corresponding to names in a text file.
6. You can then choose another tab in the DbMail Properties window or save your settings by clicking OK.

**DbMail properties tabs:**

[General tab](#)

[Reporting tab](#)


[SMTP tab](#)

[MAPI tab](#)

[Notify tab](#)

## DbMail general tab

**Overview:** create or update the General section of the dbmail.ini file.

 Take advice on these settings if you want to change them.

Field	Description						
Mail delivery method	<p>Select the protocol DbMail uses to deliver emails to your mail server:</p> <table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>SMTP</td> <td>Simple Mail Transfer Protocol — enter the details on the <a href="#">SMTP</a> tab.</td> </tr> <tr> <td>MAPI</td> <td>Mail Application Programming Interface — enter the details on the <a href="#">MAPI</a> tab.</td> </tr> </tbody> </table>	Option	Description	SMTP	Simple Mail Transfer Protocol — enter the details on the <a href="#">SMTP</a> tab.	MAPI	Mail Application Programming Interface — enter the details on the <a href="#">MAPI</a> tab.
Option	Description						
SMTP	Simple Mail Transfer Protocol — enter the details on the <a href="#">SMTP</a> tab.						
MAPI	Mail Application Programming Interface — enter the details on the <a href="#">MAPI</a> tab.						
Administrator's mail address	<p>Specify where notification emails should be sent:</p> <ul style="list-style-type: none"> <li>• Either the DbMail Administrator's email address</li> <li>• Or the DbMail Address Book entry for the DbMail Administrator.</li> </ul> <p>Notification emails report any problems encountered when delivering the email to the mail server. Unless the problem results in no emails being successfully delivered by DbMail to the mail server, in which case it is not possible to send a</p>						

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notification email.

### Default setting

Mail from	Enter the email address from which emails appear to come, if different from the current user you are logged in as. Only for SMTP connections.
Reply to	Enter the email address to which any replies should be sent, if different from the sender's email address. Only for SMTP connections.
Address book location	Specify the location of a DbMail Address Book in the Address Book Location field, if you want to look up email addresses corresponding to names in a text file.

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### Button Description

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OK	Save the updated mail settings
Cancel	Exit without saving
Apply	Apply the updated mail settings.

---

### Other tabs:

[Reporting tab](#)

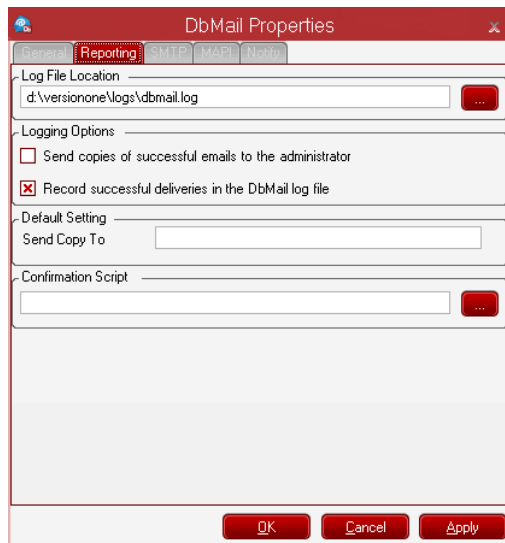
[SMTP tab](#)

[MAPI tab](#)

[Notify tab](#)

## DbMail configuration reporting tab

**Overview:** create or update the Reporting section of the `dbmail.ini` file.



Take advice on these settings if you want to change them.

Field	Description						
Log file location	Enter the location of the DbMail log file to record details of emails for later analysis.						
Logging options	Select how you want successful emails to be reported: <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Send copies of successful entries to the administrator</td> <td>Select to send copies of successful entries to the administrator.</td> </tr> <tr> <td>Record successful deliveries in the DbMail log file</td> <td>Select to add a record of successful deliveries in the DbMail log file (the default).</td> </tr> </tbody> </table>	Option	Description	Send copies of successful entries to the administrator	Select to send copies of successful entries to the administrator.	Record successful deliveries in the DbMail log file	Select to add a record of successful deliveries in the DbMail log file (the default).
Option	Description						
Send copies of successful entries to the administrator	Select to send copies of successful entries to the administrator.						
Record successful deliveries in the DbMail log file	Select to add a record of successful deliveries in the DbMail log file (the default).						
Send copy to	Enter the default email address to which a copy of all DbMail emails is also sent. This includes a delivery report for each DbMail email. You could enter the sender's email address so they retain a copy of their DbMail emails.						
Confirmation script	Enter one of: <ul style="list-style-type: none"> <li>• name of a script file</li> <li>• command to be performed immediately after each DbMail email is sent.</li> </ul>						

---

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**DbMailSend server Typical confirmation script value**

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Unix	The name of a Unix shell script.
Windows	The name of a batch file.

---

Click OK to save your settings or choose another tab.

---

**Button Description**

---

OK	Save the updated mail settings
Cancel	Exit without saving
Apply	Apply the updated mail settings.

---

**Other tabs:**

[General tab](#)


[SMTP tab](#)

[MAPI tab](#)

[Notify tab](#)

## DbMail configuration SMTP tab

If you want to use the SMTP protocol, create or update the SMTP section of the `dbmail.ini` file to specify how to contact your mail server. For example, Microsoft Exchange (running under Windows) or sendmail (Unix).

 Take advice on these settings if you want to change them.

Field	Description						
<b>Mail host detail</b>							
Host name	Enter the mail server name or its IP address.						
Port number (almost always 25)	Enter the port that the mail server uses to listen for incoming requests in the Port Number field. This is 25 except in rare circumstances.						
<b>SMTP authorisation</b>							
Authorisation	<table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>NONE</td> <td>No authorisation</td> </tr> <tr> <td>LOGIN</td> <td>Specify an SMTP login</td> </tr> </tbody> </table>	Option	Description	NONE	No authorisation	LOGIN	Specify an SMTP login
Option	Description						
NONE	No authorisation						
LOGIN	Specify an SMTP login						
User name	Add the SMTP login (if LOGIN is selected from the drop-down						

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	above).
Password	Add the corresponding password for the user name above.
Store as Base64	Select to specify how you want the details storing, to provide some encryption.
<b>Connection setting</b>	
HELO/EHLO response timeout	Enter the response timeout value.
Failed response retry sleep time	Enter the failed response retry time.
Failed response retry sleep count	The number of retries before giving up.
<b>Attachment setting</b>	
Base64 line-chunking	
Default Mime-Type	Enter the default MIME type, eg application/octet-stream.

---

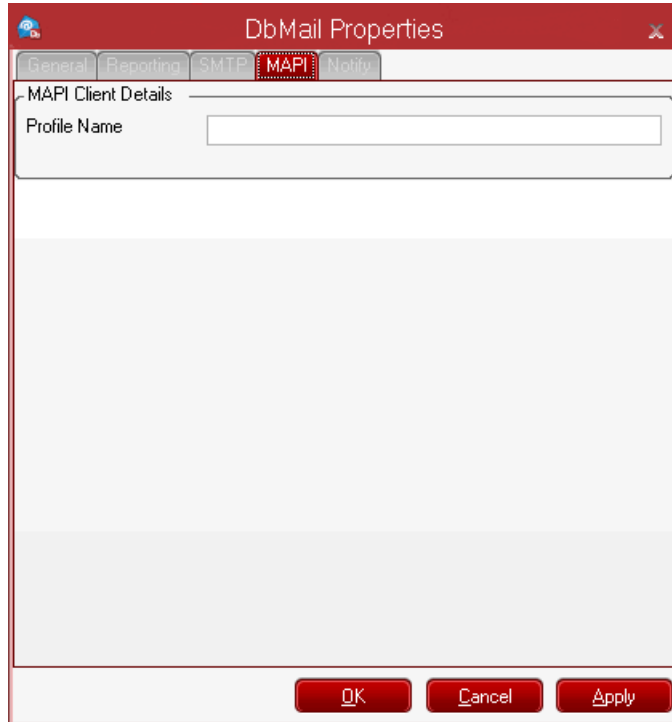
Click OK to save your settings or choose another tab.


**Other tabs:**

- [General tab](#)
- [Reporting tab](#)
- [MAPI tab](#)
- [Notify tab](#)

## DbMail configuration MAPI tab

**Overview:** if you want to use the MAPI protocol, create or update the MAPI section of the dbmail.ini file.



 Take advice on these settings if you want to change them.

Field	Description
<b>MAPI client details</b>	
Profile name	<p>Enter the name of the Windows profile to use to send emails from DbMail. The profile specifies how the MAPI client should pass mail requests to the MAPI server.</p> <p>We recommend setting up a Windows profile specifically for emails delivered to your mail server by DbMail.</p>

Click OK to save your settings or choose another tab.

### Button Description

OK	Save the updated mail settings
Cancel	Exit without saving

---

Apply    Apply the updated mail settings.

---

**Other tabs:**

[General tab](#)

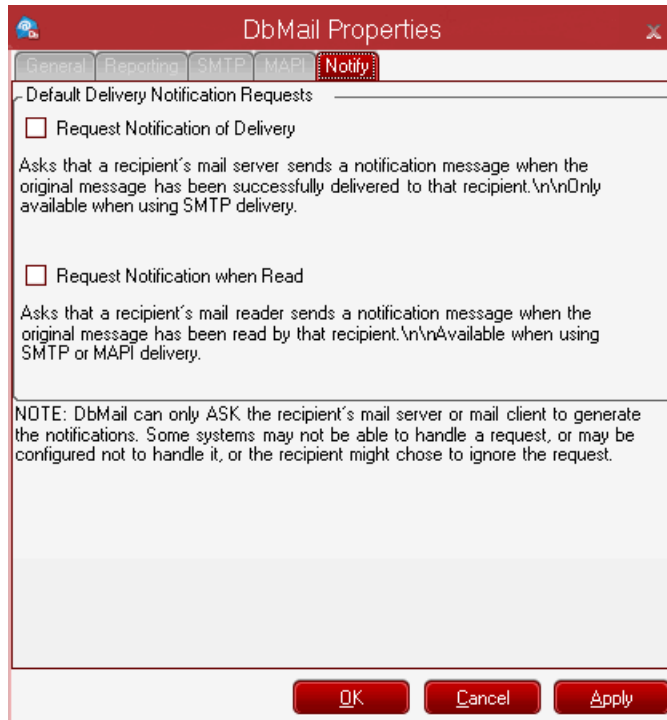
[Reporting tab](#)


[SMTP tab](#)

[Notify tab](#)

## DbMail configuration notify tab

**Overview:** create or update the DefaultNotify setting in the General section of the dbmail.ini file.



 Take advice on these settings if you want to change them.

Field	Description						
Default delivery notification requests	Specify whether you want to receive a notification message, when an email has been successfully delivered or when they have opened it in their email application Choose one or both of:						
	<table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Request notification of delivery</td> <td>Ask the recipient's email server to send a notification message when the original message has been successfully delivered. Only available when using SMTP delivery.</td> </tr> <tr> <td>Request notification when read</td> <td>Ask the recipient's email server to send a notification message when the original message has been opened. Available when using SMTP or MAPI delivery.</td> </tr> </tbody> </table>	Option	Description	Request notification of delivery	Ask the recipient's email server to send a notification message when the original message has been successfully delivered. Only available when using SMTP delivery.	Request notification when read	Ask the recipient's email server to send a notification message when the original message has been opened. Available when using SMTP or MAPI delivery.
Option	Description						
Request notification of delivery	Ask the recipient's email server to send a notification message when the original message has been successfully delivered. Only available when using SMTP delivery.						
Request notification when read	Ask the recipient's email server to send a notification message when the original message has been opened. Available when using SMTP or MAPI delivery.						



Notification messages depend on how the recipient's email application is configured. If you don't receive a notification it might not indicate a problem. The recipient's system may not handle the request or the recipient might choose to ignore it.

Click OK to save your settings or choose another tab.

**Other tabs:**

[General tab](#)

[Reporting tab](#)

[SMTP tab](#)

[MAPI tab](#)

---

## Editing dbmail.ini with a text editor

As an alternative to creating and updating the DbMail configuration file dbmail.ini using DbMailAdmin, you can edit it using a text editor. The information is contained in four sections under the headings [General], [Reporting], [SMTP], [MAPI] and [Notify].

### General information

Information in the [General] section of the dbmail.ini file:

---

Setting	Value
Delivery=	The method used by DbMailSend to deliver emails to the mail server, either 'SMTP' or 'MAPI'.
Administrator=	Indicates where notification emails should be sent (when possible) if problems are encountered when delivering email to the mail server. This is either the email address or the DbMail Address Book entry for your DbMail administrator.
DefaultFrom=	The email address from which the emails appear to come, if this is different from the email address of the user you are logged in as. [Only when the Delivery setting is 'SMTP'.]
DefaultReplyTo=	The email address to which any replies should be sent, if this is different from the sender's email address. [Only when the Delivery setting is 'SMTP'.]
AddressBook=	The location of a DbMail Address Book if you want to look up email addresses corresponding to names in a text file.
DefaultNotify=	Indicates whether you want to receive a notification message (where possible) either when an email has been successfully delivered to the recipient's Inbox or when they have opened it in their email application. You can have one of the following values: <ul style="list-style-type: none"> <li>0 – no notification messages</li> <li>1 – delivery notification message, but not a read notification</li> <li>2 – receive a notification message when a recipient reads a DbMail email, but not a receipt notification</li> <li>3 – receive a notification messages both when the email is received and when it is read.</li> </ul> <p>Notification messages also depend on how the recipient's email is configured. If you don't receive a message you expect, be careful of making assumptions based on this.</p>

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### Reporting information

Information in the [Reporting] section of the dbmail.ini file:

Setting	Value
LogFile=	The location of the DbMail log file where details of emails are recorded for later analysis using DbMailAdmin. For example, LogFile=c:\programs\dbmail\dbmail.log on a Windows server.
MailAdminSuccesses=	Whether you want the DbMail Administrator to receive email copies of successful emails, as well as those DbMailSend has failed to deliver to the mail server. Either: <ul style="list-style-type: none"> <li>0 – only send copies of emails that failed to deliver to the mail server, to the administrator</li> <li>1 – send copies of all emails to the administrator.</li> </ul>
LogSuccesses=	Indicates whether you want to successful emails to be recorded in the DbMail log file. Either: <ul style="list-style-type: none"> <li>0 – only emails that DbMail failed to deliver to the mail server are recorded in the log file</li> <li>1 – all DbMail emails are recorded in the log file.</li> </ul>
DefaultReportTo=	The default email address to which a copy of emails (including a delivery report for each) is also sent. For example, the sender's own email address so they retain a copy of their DbMail emails.
ConfirmScript=	The name of a script file or a command run immediately after each email is sent. For a Unix server the confirmation script is typically the name of a Unix shell script. For a Windows server this is typically the name of a batch file.

### SMTP information

Information in the [SMTP] section of the dbmail.ini file:

Setting	Value
MailHost=	How to contact your mail server. For example, Microsoft Exchange (Windows) or sendmail (Unix). The name of the mail server machine or its IP address.
MailPort=	The port the mail server uses to listen for incoming requests. This is '25' except in rare circumstances.

### MAPI information

Information in the [MAPI] section of the dbmail.ini file:

Setting	Value
Profile=	The name of the email profile on your system used to send emails from DbMail. The profile specifies how the MAPI client passes mail requests to the MAPI server. We recommend you set up a Windows profile

specifically for emails generated and delivered to your mail server by DbMail.

---

---

## Demonstration mode

You can run DbMailSend in a demonstration mode. This works the same as usual except all emails are sent to the same email address held in the `dbform.key` file.

### To configure your email address

1. Start DbMailAdmin.
2. Choose Register DbMail from the Help menu, to show the Confirm License Location window.
3. Accept or update the location of the key file on your system and click OK to display the License DbMail window.
4. Enter the email address you want all mail to be sent to in the Mail-Back Address field.
5. Click Demo Mode.
6. Click OK.

### Activating normal mode

To activate DbMail to run in its normal mode, rather than demonstration mode, you need to contact Version One for a new key file.

---

# Glossary

## A

**accounts package:** Version One packages can interface with third-party standard accounts and ERP packages.

**annotation:** A note added to a document in DbArchive. Like adding a sticky not to a paper document, the original document is not changed.

**authorisation route:** Documents can proceed through a number of approval states to be fully authorised. The authorisation route taken by a particular document follows predefined rules. Rules can use fields from the document, such as total value.

## B

**barcode:** An optical machine-readable representation of data.

## D

**DbArchive:** An enterprise-wide document imaging and management system, used to archive outgoing and incoming documents, and retrieve them quickly and easily.

**DbAuthorise:** Manages the authorisation of documents, such as supplier invoices requiring payment. Each document can pass through a series of authorisations before final approval.

**DbCapture:** Used to give a summary view of captures and lets you work with your documents. Captured information is shown and any problems with documents can be corrected.

**DbConsole:** Provides facilities for configuring and controlling the way DbScanner, DbQuery and DbWebQuery operate.

**DbDeposit:** Used to add extra document into the archive. Most documents are deposited automatically by printing invoices or scanning. DbDeposit allows you to add a file, such as a Word document or a PDF file, into the archive.

**DbFax:** Provides facilities for sending electronic documents by fax. Administrators can use DbFax to view fax requests on the server, edit or view system files, and take appropriate actions.

**DbForm:** Used to process source files (typically a print spool file), reformat them and pass the new layout to an output program. Output programs can convert the file to a different format, eg tiff, pdf, xml, csv, and pass it to other programs, such as DbFax, DbArchive and DbMail.

**DbLogin:** The common module used to access each of the document management suite applications.

**DbMail:** Module handling email integration, used to generate and send emails from your business applications. For example, send remittance advices directly to your suppliers via email, instead of printing, faxing or posting.

**DbMailAdmin:** The administration component of DbMail used to enter the information and select options to run DbMail how you want.

**DbQuery:** Provides facilities for finding and retrieving your archived and stored information.

**DbScanner:** Provides facilities for scanning paper documents and processing the images.

**DbTrans:** Before you can edit or delete a table you must unload the document data stored in it, and export it to another file.

**DbWebquery:** Provides facilities for retrieving the stored information through a standard web browser interface. Similar to DbQuery in use.

**DbWebRetrieve:** Uses a web browser to find and work with documents in your archive (DbArchive). You can search by a number of methods.

**document profile:** Document profiles control a set of scanning properties. It controls aspects to the scanning process such as whether barcodes are used, the OCR environment (if OCR is being used), how look-ups work for the document tags and so on. Each document profile is connected to a document type.

**document type:** A document type is created for each sort of document that is scanned. For example purchase orders, purchase invoices, goods received notes, etc.

**duplex:** Double-sided document printing.

## **E**

**EDI:** Electronic Data Interchange — electronic exchange of transaction documents with your trading partners.

**ERP:** Enterprise Resource Planning — software applications that integrate internal and external management information across an organisation, embracing finance/accounting, manufacturing, sales and service, CRM, etc.

**event log:** A record of all the activity on your system — may be used by the support team to help diagnose any problems.

## **G**

**green meter:** A package used to quantify the environmental savings from using the software in terms of CO2 emissions and tree equivalents.

**GUI designer:** Graphical tool available to produce the .def file. Input spool files can be mapped and output form definitions can be generated from scanned input files, data can then be placed on the output form.

## **I**

**import batch:** Used if documents arrive through Electronic Data Interchange (EDI) or are scanned using another software package.

## **J**

**JPG:** Graphic file format, uses 'lossy' compression, to give smaller file sizes.

## **K**

**Kofax:** Kofax software is the image-processing engine used with DbScanner.

## **M**

**mail:** Applications can use your email client to send a document from one user to another.

**manual recognition:** Sometimes a document cannot be OCR'd properly, either because it was poor quality or hand-written. You are shown a warning for these fields and you can edit the values manually.

## **O**

**OCR:** Optical Character Recognition — the electronic translation of images of text (usually captured by a scanner) into editable text. OCR is not an exact science and requires human validation to make sure the results are acceptable. Think in terms of around 90% accuracy, depending on fonts, size, quality of original, etc.

## **S**

**scanner:** A device that optically scans images, printed text or handwriting and converts it to a digital image.

## **T**

**TIFF:** Graphic file format, uses 'lossless' compression, giving larger file sizes.

## **V**

**Version One:** Award winning document management company. Authors of the document management suite of applications, saving time, improving efficiencies and improving green credentials.

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