

# Setting up E-mail Services

## Overview

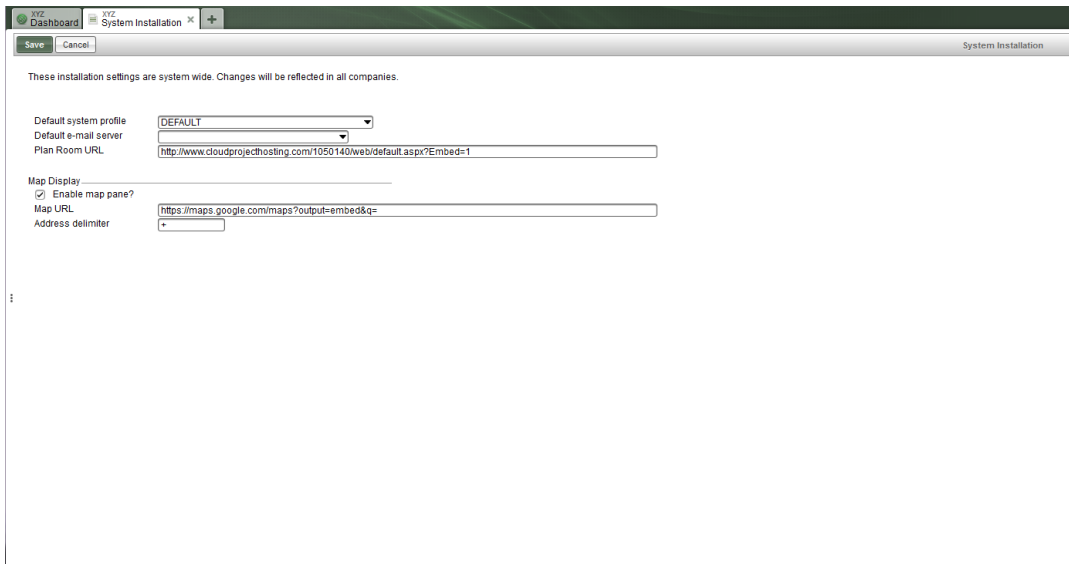
Setting up e-mail services will allow Spectrum v14 users to e-mail reports from within Spectrum. There are three steps required to configure e-mail services:

1. Set the default e-mail server.
2. Configure settings for the e-mail server.
3. Configure e-mail credentials for each Spectrum user.

## Default E-mail Server

Set the default e-mail server in the **Default email server** field in the **System Installation** screen.

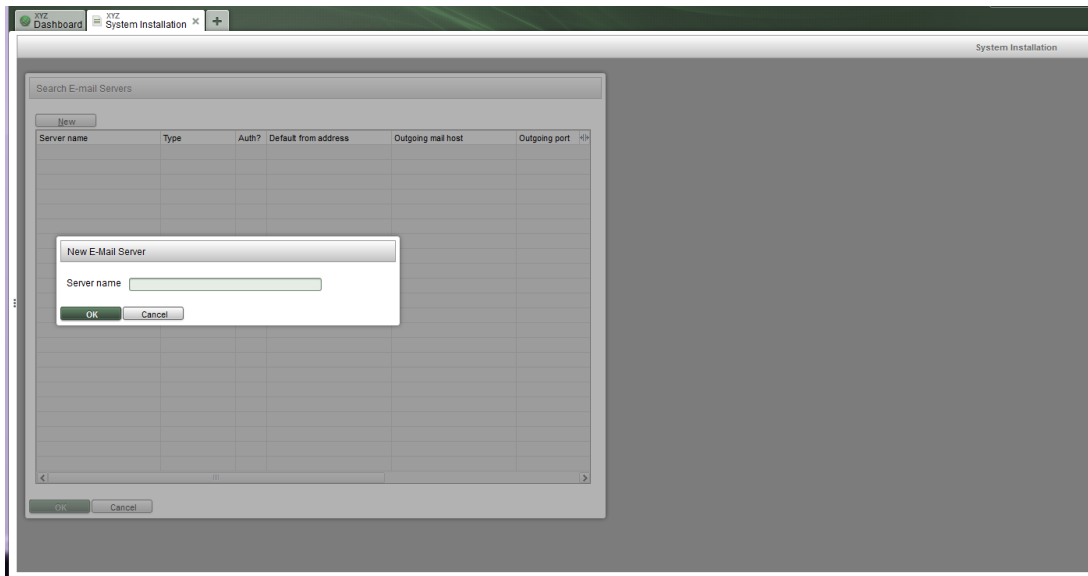
1. To access the System Installation screen go to System Administration | Installation | System.



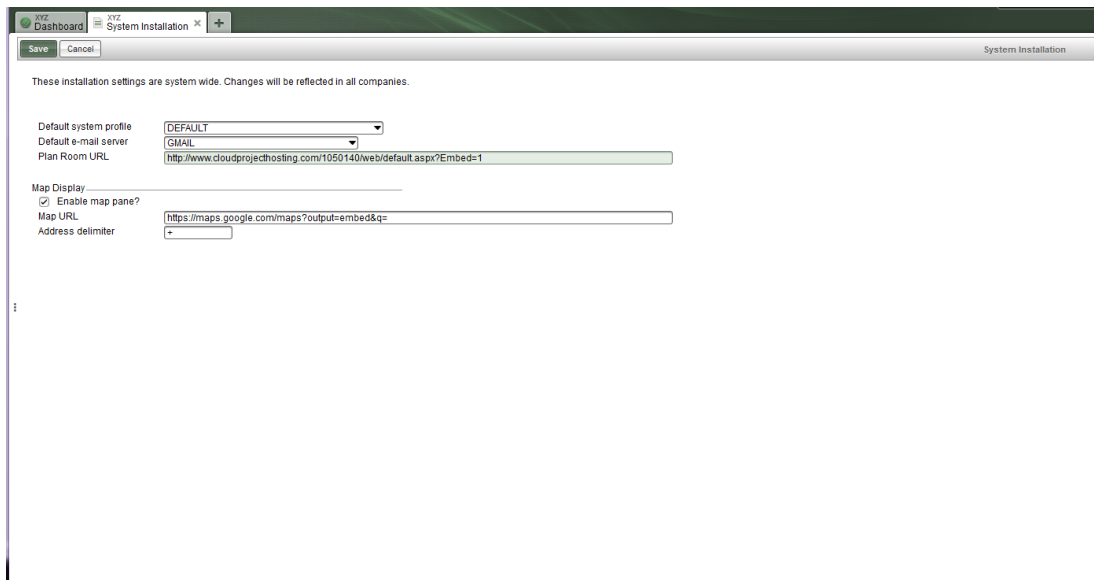
The screenshot shows the 'System Installation' configuration screen. At the top, there are 'Save' and 'Cancel' buttons. Below that, a message states: 'These installation settings are system wide. Changes will be reflected in all companies.' The configuration fields are as follows:

- Default system profile: A dropdown menu with 'DEFAULT' selected.
- Default e-mail server: A dropdown menu with a downward arrow.
- Plan Room URL: A text input field containing 'http://www.cloudprojecthosting.com/1050140/web/default.aspx?Embed=1'.
- Map Display: A section header.
- Enable map pane?: A checkbox with a checked mark.
- Map URL: A text input field containing 'https://maps.google.com/maps?output=embed&q='.
- Address delimiter: A text input field containing a plus sign '+'. There is a small 'x' icon to the right of the field.

2. Click the down arrow on the **Default email server** field and click **New**.



3. Enter a name for the e-mail server in the **Server name** field and click **OK** twice. This is an arbitrary name used to reference the e-mail server. It can be any name and does not have to be the address of the e-mail server.

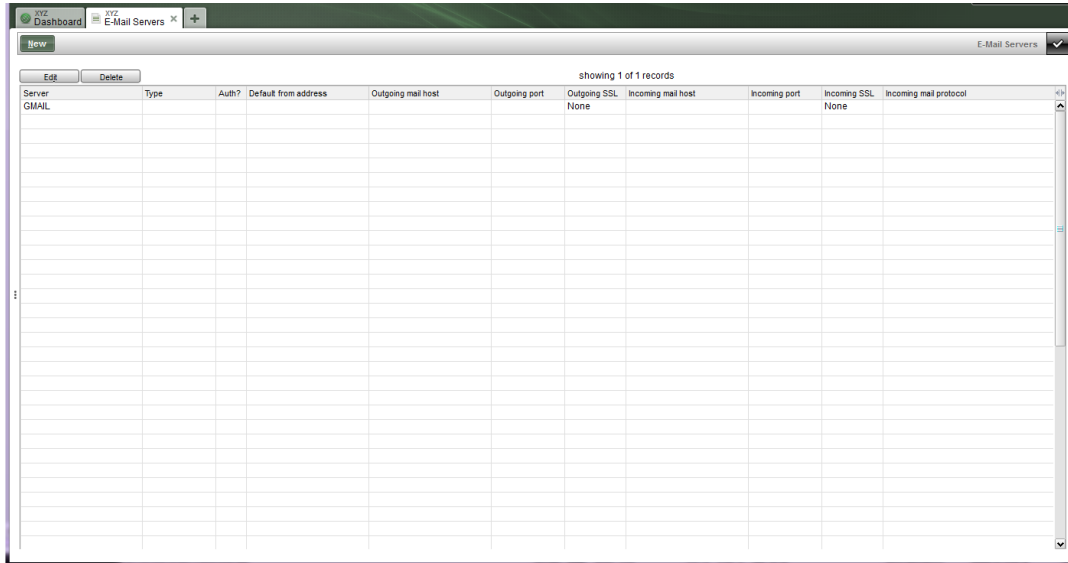


4. Click **Save** to save the changes and exit the System Installation screen.

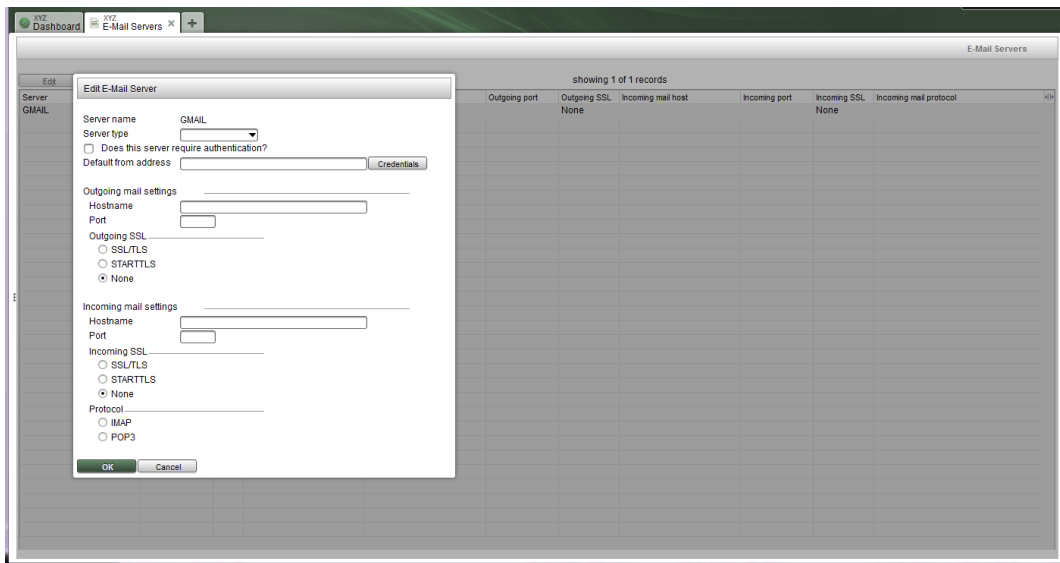
# E-Mail Server Configuration

Set up the configuration for the e-mail server in the **E-mail servers** screen.

1. To access the E-mail servers screen go to System Administration | Security | E-mail servers.



2. Select the e-mail server you want to configure and click **Edit**. The **Edit E-mail Server** window will display.



The information for this screen may need to be provided by your IT person:

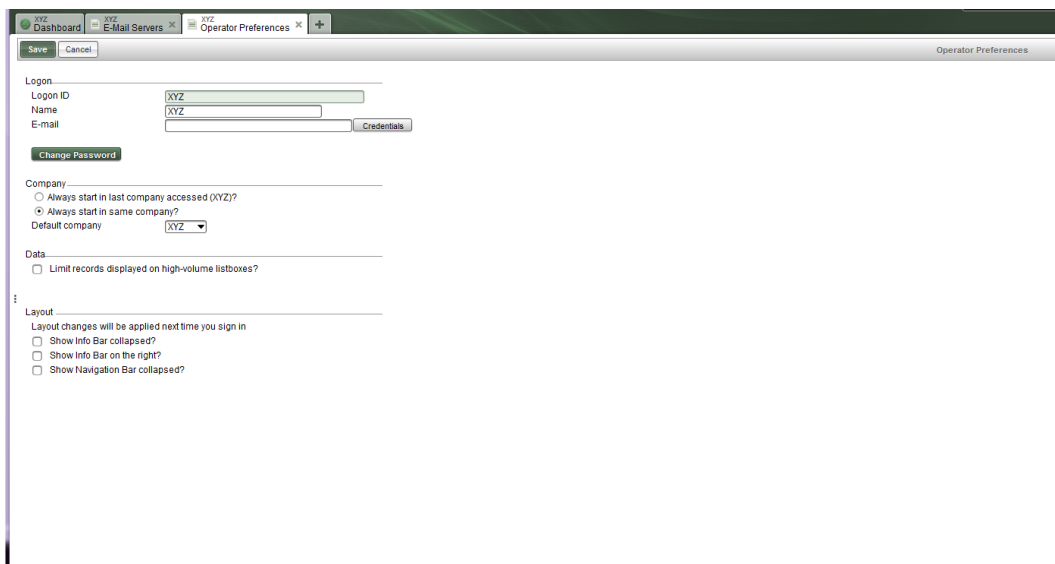
- Server type
  - Click the down arrow to select the type of e-mail server from the drop-down box and click **OK**.
  - Gmail, Hotmail, Outlook 365, Outlook.com, and Yahoo! are preconfigured for your convenience.
- Does this server require authentication?
  - Select this option if the e-mail server requires a username and password.
- Default from address
  - Click **Credentials** if you wish to set up a default e-mail address to use when an e-mail address has not been set up for the particular user (see User Configuration section below). You will have to enter the **E-mail address**, **E-mail server**, **Username**, and **Password** in the window that displays.
  - This is not a required field.
- Outgoing mail settings
  - These settings are for the SMTP mail server that is used for sending e-mail messages.
    - Hostname
      - Enter the fully qualified domain name of the mail server.
    - Port
      - Enter the port that is used to connect to the mail server.
    - Outgoing SSL
      - SSL/TLS
        - Check this option if the e-mail server is using a secure port to establish encryption immediately upon connecting.
      - STARTTLS
        - Check this option if the e-mail server is establishing encryption using STARTTLS after connecting.
      - None
        - Check this option if the e-mail server is not using an encrypted connection.
- Incoming mail settings
  - These settings are for the IMAP or POP3 mail server that is used for downloading e-mail messages for Project Log subscriptions and for saving sent e-mail to a sent e-mail folder. IMAP and POP3 is disabled on Exchange servers by default and must be turned on for this functionality to work.
    - Hostname
      - Enter the fully qualified domain name of the mail server.
    - Port
      - Enter the port that is used to connect to the mail server.
    - Incoming SSL
      - SSL/TLS
        - Check this option if the e-mail server is using a secure port to establish encryption immediately upon connecting.

- STARTTLS
    - Check this option if the e-mail server is establishing encryption using STARTTLS after connecting.
  - None
    - Check this option if the e-mail server is not using an encrypted connection.
  - Protocol
    - Select the protocol (IMAP or POP3) used for downloading e-mail messages.
3. Click **OK** when finished.

## User Configuration

The last step is to configure each user with their e-mail credentials. This can be set up individually by each user in **Operator Preferences**.

1. Click **Preferences** in the upper right corner of the screen.



2. Click **Credentials** at the right of the **E-mail** field.

The image shows a dialog box titled "E-Mail Credentials". It has the following fields and buttons:

- E-mail address**: A text input field.
- E-mail server**: A dropdown menu.
- Username**: A text input field.
- Password**: A text input field.
- 'Sent' folder**: A text input field.
- Buttons**: OK, Cancel, Delete, Test Send, and Test Inbox.

- a. Enter the operator's e-mail address in the **E-mail address** field.
  - b. Click the down arrow on the **E-mail server** field to display the list of e-mail servers. Select the e-mail sever to use and click **OK**.
  - c. Enter the operator's e-mail username in the **Username** field.
  - d. Enter the operator's e-mail password in the **Password** field.
  - e. Enter the name of the e-mail folder to save sent e-mail (e.g., Sent Items) in the **'Sent folder'** field.
3. To test outgoing mail settings, click **Test Send**. If successful, you will receive a "Test message sent" notification and the user will receive an e-mail message in his or her e-mail inbox.
  4. To test incoming mail settings, click **Test Inbox**. If successful, you will receive a "Connection test was successful" notification. If this fails, sent e-mail will **not** be saved in the **'Sent' folder**.
  5. Select **OK** and then click **Save** to save the user's e-mail credentials.

## Connecting to an MS Exchange Server

This section describes solutions to the most common issues that are encountered when setting up e-mail services to connect to an MS Exchange server.

### SSL Connections

Spectrum will not establish an SSL connection to an Exchange server that is using a self-signed SSL certificate. If you are going to connect to an Exchange server that is using a self-signed SSL certificate you will have to use an Exchange connector for the Spectrum server that does not use SSL.

### Authentication

Spectrum does not support NTLM authentication. Make sure the Exchange connector is configured to allow "basic authentication."

### Unable to Send E-mail Outside of the Company

If users can send e-mail inside the company but not outside the company, Spectrum is connecting to the Exchange server via a connector that allows anonymous connections. When connecting via a connector

that allows anonymous connections authentication will not occur and the Exchange server will prevent sending e-mail to a domain that is not serviced by the Exchange server. To resolve this use an Exchange connector that does not allow anonymous connections.

## Some Users Can Send E-mail But Not Others

If some users but not others are able to send e-mail, the cause could be a missing permission on the Exchange mailbox. Exchange mailboxes require the NT AUTHORITY/SELF Send-As permission to send e-mail via SMTP. Check the Send-As permissions on the Exchange mailboxes for the users that are unable to send e-mail by opening the Exchange Management Console and right-clicking the mailboxes and selecting Manage Send-As Permissions. Add the NT AUTHORITY/SELF permission if missing.

## Microsoft Exchange Connector Options

Microsoft Exchange receive connectors are configured in the Exchange Management Console by navigating to **Server Configuration | Hub Transport | Receive Connectors** [tab].

### *CA-Signed SSL Certificate*

If the Exchange server is using a CA-signed SSL certificate, Spectrum can connect via a connector that uses SSL.

- Network options
  - Local network settings
    - Local IP addresses = All available IP addresses
    - Port = 25 or 587
  - Remote network settings
    - Remote IP addresses = <IP address of the Spectrum server>
- Authentication options
  - Transport Layer Security (TLS)
  - Basic Authentication
    - Offer Basic Authentication only after starting TLS
- Permission groups options
  - Exchange Users

The corresponding configuration for the e-mail server in Spectrum is:

- Server type MS Exchange
- Does this server require authentication? Checked
- Outgoing mail settings
  - Hostname <FQDN of Exchange server>
  - Port 25 or 587
  - Outgoing SSL STARTTLS

### *Self-Signed SSL Certificate*

If the Exchange server is using a self-signed SSL certificate, Spectrum must connect via a connector that does not use SSL.

- Network options
  - Local network settings

- Local IP addresses = All available IP addresses
    - Port = 25 or 587
  - Remote network settings
    - Remote IP addresses = <IP address of the Spectrum server>
- Authentication options
  - Basic Authentication
- Permission groups options
  - Exchange Users

The corresponding configuration for the e-mail server in Spectrum is:

- Server type MS Exchange
- Does this server require authentication? Checked
- Outgoing mail settings
  - Hostname <FQDN of Exchange server>
  - Port 25 or 587
  - Outgoing SSL NONE