



# Email and SMTP Troubleshooting Guide for infoRouter Version 8.x

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**Active Innovations, Inc. A Document Management Company**

<http://www.inforouter.com>

# Introduction:

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Use the document to troubleshoot common issues related to email and SMTP.

During the setup process, you are prompted to choose which SMTP server to use and information related to the selected SMTP server. This information is then stored in a configuration file called web.config.

If you did not choose to enter this information during the setup/installation of infoRouter or if this information has changed, you must manually make these changes.

The web.config file is stored under the “/infoRouter/site” directory and must only be edited with a tool such as Notepad.exe.

Remember, when this file is edited, infoRouter will restart, so try not to edit it during normal operating hours.

A separate document explaining each entry in the web.config file can be found here:

<http://www.inforouter.com/Downloads/V80/Web-Config-Settings.pdf>

Email-specific settings are also covered in this document.

## SETTINGS

Settings in Web.config in <appsettings> section

### System Email Address

The email address specified here will be used to send out infoRouter notifications.

This does not have to be a valid (existing) e-mail account. It is simply a label that will appear in the "From" section of email notifications. However, if you intend to use the infoRouter "Send To" feature to send emails to third parties, their POP servers may perform reverse DNS lookups and decide that the email is junk. So, the best practice is to create a valid account that other POP servers verify.

**Sample:**

```
<add key="SystemEmailAddress" value="no_reply@acme.com" />
```

### SMTP SERVER CONNECTION PARAMETERS

The following settings are used to connect to an SMTP Server to send out infoRouter notification emails.

```
<add key="smtpserver" value="smtp.acme.com" />
<add key="smtpserverport" value="25" />
<add key="smtpconnectiontimeout" value="10" /> value is in seconds
<add key="smtpsendusername" value="infoRouter" />
<add key="smtpsendpassword" value="xyza384" />
<add key="smtpSSL" value="true" /> 'Set value to "true" for secure SMTP
```

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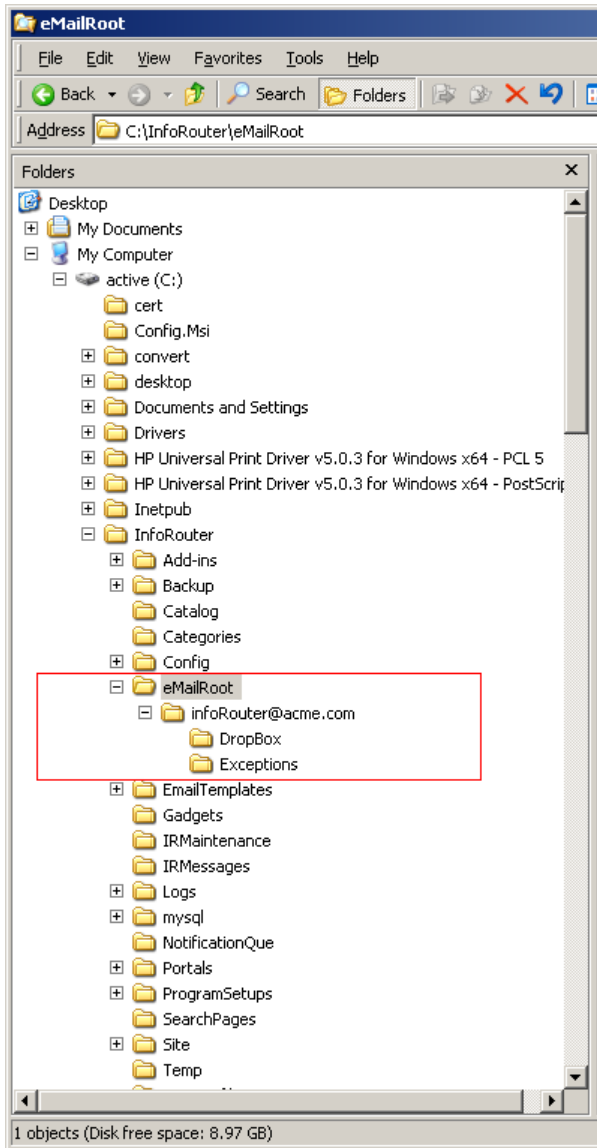
## Where do infoRouter e-mails go? How do I know if infoRouter e-mails are being generated?

When an e-mail is generated via the “Send To” or any other notification feature, the email file is created and placed in a special location on the file system. The area by default is a subfolder called EMAILROOT under the application install directory (C:\inforouter by default).

A special service then processes all pending emails. This service is triggered by a background service called IRMaintenance. This document will discuss this service more fully later.

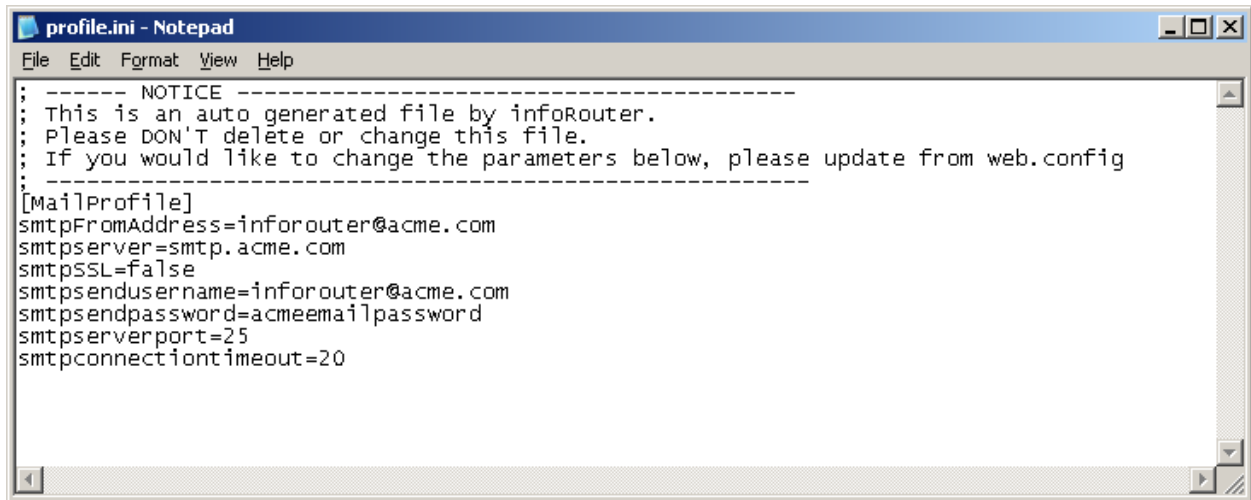
The image below demonstrates how a folder was created for an email account called [infoRouter@acme.com](mailto:infoRouter@acme.com).

The actual email will be placed into a subfolder called “DropBox.” When the infoRouter email service processes this email, it is passed over to the SMTP server defined in the web.config file. If successful, the email will be removed from this folder (DropBox); otherwise, it will be moved to the “Exceptions” subfolder.



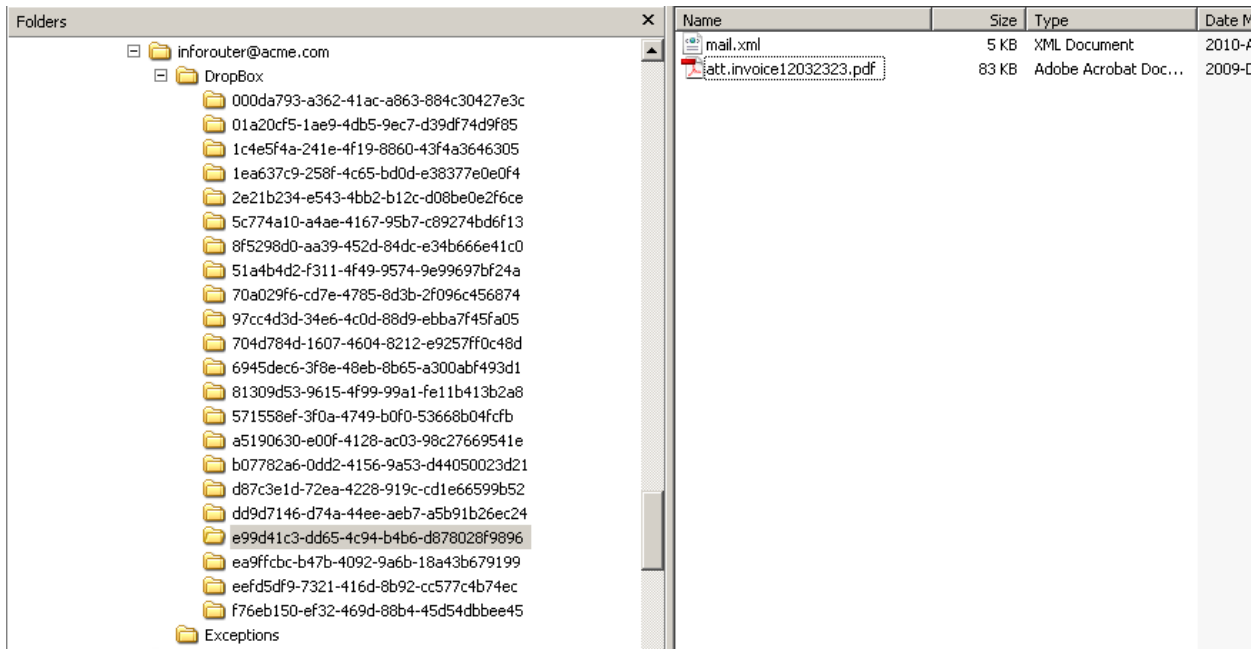
In addition to the two sub-folders created under the email account folder, you will also see a profile.ini file that contains information replicated from the web.config file. The profile.ini file must NOT be edited. If this information is incorrect, changes must be made to the web.config file.

The image below demonstrates the information stored in the profile.ini file.



```
profile.ini - Notepad
File Edit Format View Help
; ----- NOTICE -----
; This is an auto generated file by infoRouter.
; Please DON'T delete or change this file.
; If you would like to change the parameters below, please update from web.config
; -----
[MailProfile]
smtpFromAddress=infoRouter@acme.com
smtpserver=smtp.acme.com
smtpSSL=false
smtpsendusername=infoRouter@acme.com
smtpsendpassword=acmeemailpassword
smtpserverport=25
smtpconnectiontimeout=20
```

E-mails to be sent out are pooled under a series of folders named uniquely, as indicated by the image below. Each uniquely named folder contains a single email to be sent out. The email to be sent out is stored in a file called mail.xml. If the email contains any attachments, these are stored as additional files that begin with the "att." prefix.



The e-mail service is triggered by the IRMaintenance Service. This service checks the DropBox folder to see if there are emails to be sent. The pending e-mails are sent to the related target e-mail addresses by using the SMTP information provided by the web.config file.

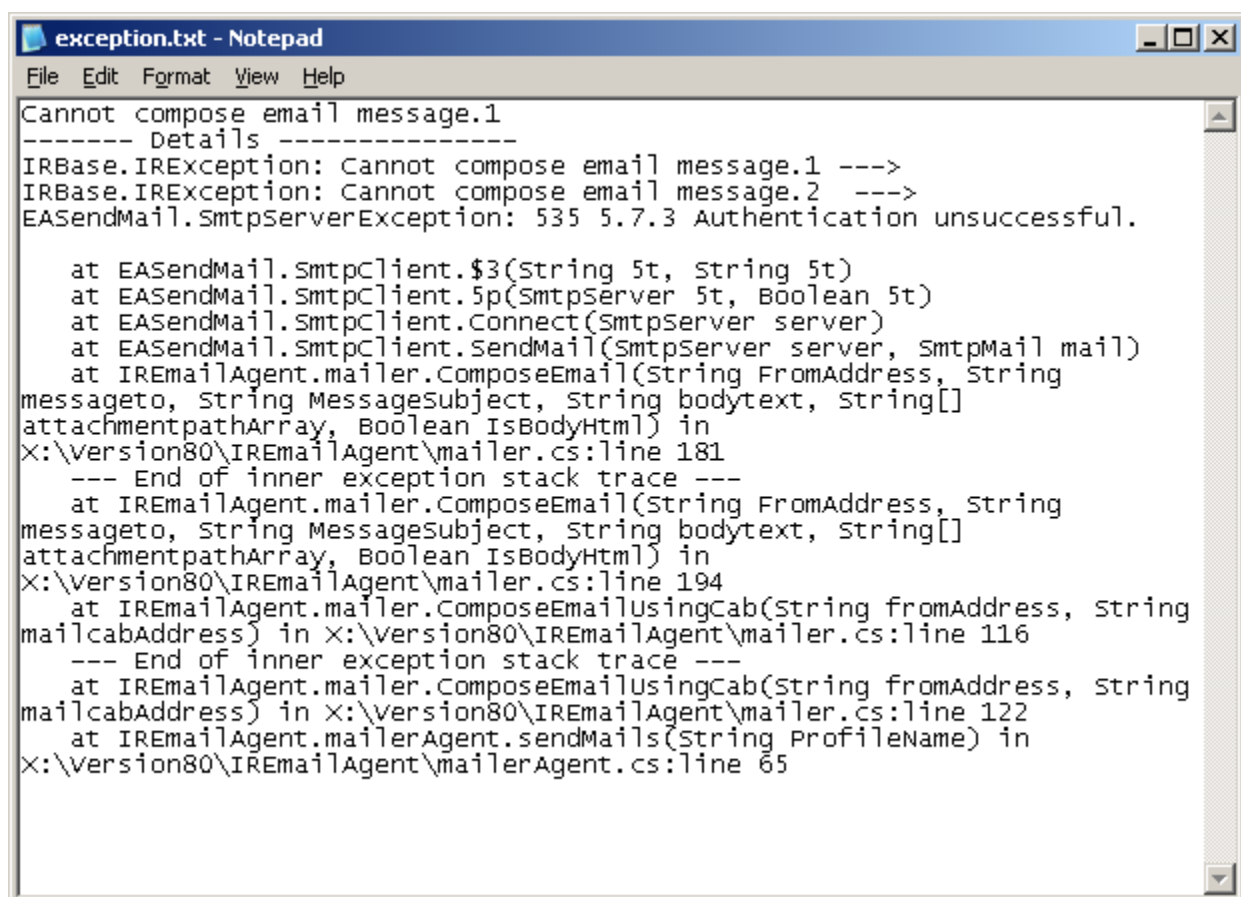
If the "IRMaintenance" service is not running e-mail services as well as other critical tasks such as garbage collection and session management cannot be performed. Please check to see if this service is running.

*Note:*

infoRouter version 7.5 followed a different path in processing emails. When the conditions for sending an email were met, the email would be generated and passed on to the SMTP server to be sent out immediately. If an error occurred, the email would essentially be lost, and no record would exist on the infoRouter side.

Version 8 handles such cases by placing the email in a local directory. Emails that cannot be sent are moved to the Exceptions folder, allowing infoRouter, the administrator, to troubleshoot the problem from within infoRouter.

The screenshot below demonstrates how one such failed email is logged.



```
exception.txt - Notepad
File Edit Format View Help
Cannot compose email message.1
----- Details -----
IRBase.IRException: Cannot compose email message.1 --->
IRBase.IRException: Cannot compose email message.2 --->
EASendMail.SmtpServerException: 535 5.7.3 Authentication unsuccessful.

    at EASendMail.SmtpClient.$3(String 5t, String 5t)
    at EASendMail.SmtpClient.5p(SmtpServer 5t, Boolean 5t)
    at EASendMail.SmtpClient.Connect(SmtpServer server)
    at EASendMail.SmtpClient.SendMail(SmtpServer server, SmtpMail mail)
    at IREmailAgent.mailer.ComposeEmail(String FromAddress, String
messageto, String MessageSubject, String bodytext, String[]
attachmentpathArray, Boolean IsBodyHtml) in
X:\Version80\IREmailAgent\mailer.cs:line 181
--- End of inner exception stack trace ---
    at IREmailAgent.mailer.ComposeEmail(String FromAddress, String
messageto, String MessageSubject, String bodytext, String[]
attachmentpathArray, Boolean IsBodyHtml) in
X:\Version80\IREmailAgent\mailer.cs:line 194
    at IREmailAgent.mailer.ComposeEmailUsingCab(String fromAddress, String
mailcabAddress) in X:\Version80\IREmailAgent\mailer.cs:line 116
--- End of inner exception stack trace ---
    at IREmailAgent.mailer.ComposeEmailUsingCab(String fromAddress, String
mailcabAddress) in X:\Version80\IREmailAgent\mailer.cs:line 122
    at IREmailAgent.mailerAgent.sendMails(String ProfileName) in
X:\Version80\IREmailAgent\mailerAgent.cs:line 65
```

If the errors are occurring due to problems in authentication or relay, changes must be done to fix these issues. All emails in the exceptions folder can then be manually moved to the Drop Box folder to be re-processed.

## Common SMTP Issues:

- 1- If you use an SMTP server hosted by an ISP, you may not have the required access to make changes. By default, the port to be used is 25; however, most ISPs do not switch to other ports. Find out from your ISP what these configuration values are so you can make the required changes in the web.config file.
- 2- If you are using a local/internal SMTP server or local software such as MS Exchange, contact your administrator to make sure you are using the correct email account information.
- 3- If you do not wish to use an email account provided by your ISP or do not wish to use a local MS Exchange account, you may set an SMTP server on a machine you control locally. Please consult the related documentation on setting up or creating an SMTP server. Please visit [support.inforouter.com](http://support.inforouter.com) for more information.



## Email and SMTP Configuration settings:

Login to infoRouter as the Sysadmin and navigate to the infoRouter control panel.

The screenshot shows the 'infoRouter Demo Portal' Control Panel. The navigation bar includes Home, Document Library, Categories, Search, System Administrator, My Tasks, Control Panel, Help, Logout, and My Profile. The main content area is a grid of 12 tiles, each with an icon and a title. The 'Email and Notification Settings' tile is highlighted with a red border. The tiles are:

- Manage Users**: Click here to manage infoRouter user accounts. Here you can create new infoRouter accounts, edit/delete existing accounts and import user accounts. [more..](#)
- Global User Groups**: Click here to manage Global User Groups. Here you can create and manage Global User Groups which allow you to easily manage library access and security. [more..](#)
- Libraries**: Click here to manage infoRouter Libraries. Here you can create isolated work areas for your employees, customers and partners. [more..](#)
- Portals**: Click here to manage infoRouter Portals. Portals are customized entry points into infoRouter. Here you can create various portals for employees, customers and partners. [more..](#)
- MIME Types**: Click here to manage MIME Types. MIME Types allow infoRouter and your browser to correctly identify document formats during downloads. [more..](#)
- Custom Properties**: Click here to manage Custom Property Sets. Custom Property Sets are customizable sets of information that can be defined and attached to folders, documents and users. These sets of information are used to further define the document, folder or user. [more..](#)
- Warehouse Status**: Click here to view vital statistics about your disk space usage and how your documents are spread out over the drives in the infoRouter Document Warehouse. [more..](#)
- License Manager**: Click here to enter/edit your infoRouter License Key.
- System Recycle Bin**: Click here to manage the System Recycle Bin. Here you can search for and restore deleted documents. [more..](#)
- General Application Settings**: Please click here to manage the General Application Settings.
- Authentication and Password Policy Settings**: Please click here to manage the Authentication and Password Policy Settings.
- Email and Notification Settings**: Please click here to manage the Email and Notification Settings.
- Flush Application Cache and Settings**: Click here to flush application settings and cached items.
- Search and Category Administrators**: Click here to create/edit Saved Search/Category Administrators. [more..](#)
- Online Samples**: Click here to download sample templates, portals, documents and custom properties from the infoRouter support site.

Click on the Email and Notification Settings link to display the following window.

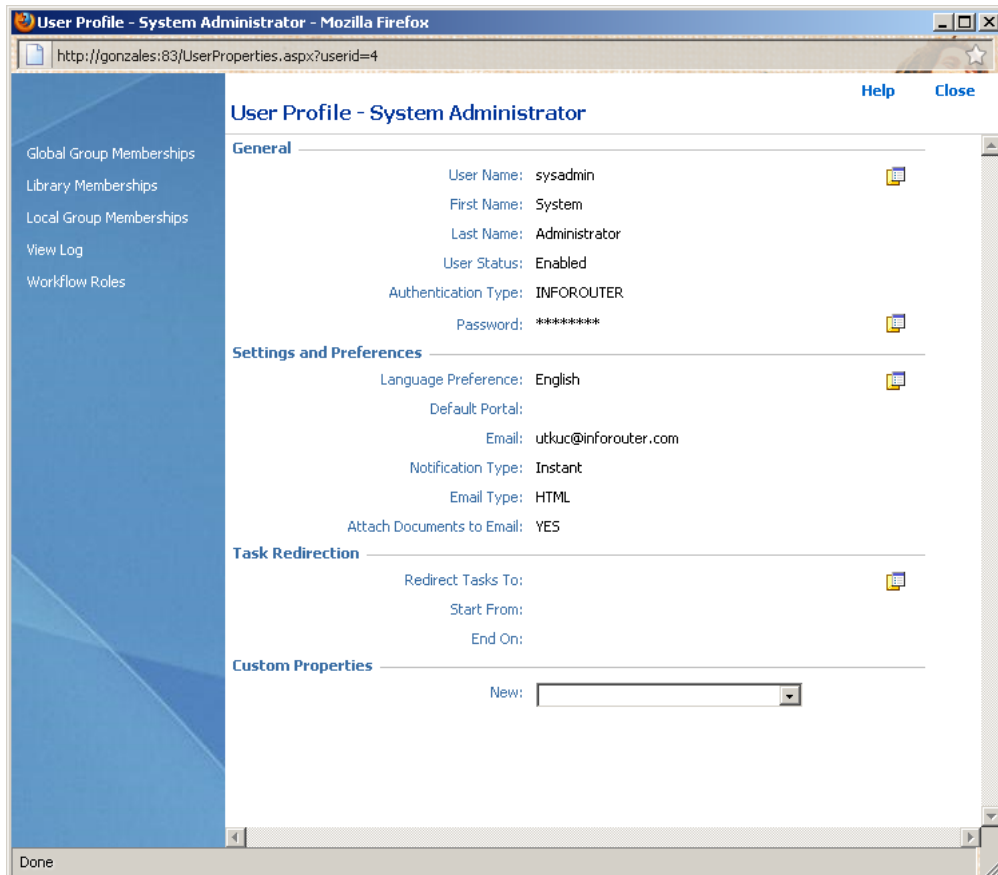
The screenshot shows the 'Email and Notification Settings' configuration window. The window title is 'Email and Notification Settings' with 'Help' and 'Back' buttons. The settings are organized into sections:

- SMTP Server Settings - [WEB.CONFIG]**
  - SMTP Server Name : smtp.acme.com
  - SMTP Server Port : 25
  - SMTP Connection Timeout : 20
  - SMTP User Name : inforouter@acme.com
  - System Email Address : inforouter@acme.com
- Subscription Settings**
  - Enable Email Notifications :
  - Allow Email Attachments :
  - Attachment Size Limit (KB) :
- Send to Settings**
  - Enable "Send To" feature :
  - Enable Attachments :
- Outlook Integration**
  - Allow Partial Email Uploads :

At the bottom of the window are 'Save' and 'Cancel' buttons.

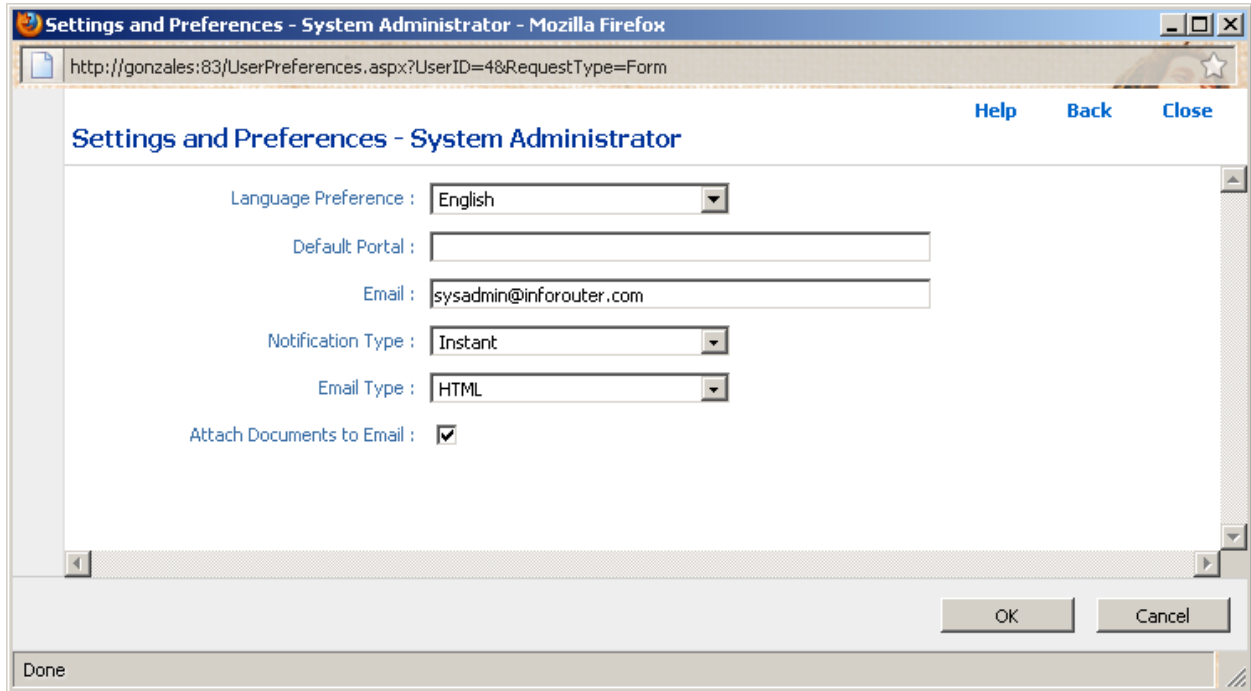
This window allows you to control how email functions work. Notice that the first section of the windows refers to information that can only be modified by editing the web.config file.

The window below demonstrates how users can specify their own email preferences.



The “Notification Type” combo box allows users to specify the frequency of emails sent to them by infoRouter. The choices are None, Instant and Daily Reports.

The user can also specify the format of the emails they prefer to receive (HTML or Text)



The screenshot shows a web browser window titled "Settings and Preferences - System Administrator - Mozilla Firefox". The address bar shows the URL "http://gonzales:83/UserPreferences.aspx?UserID=48&RequestType=Form". The page content includes the following fields and options:

- Language Preference : English (dropdown menu)
- Default Portal : (text input field)
- Email : sysadmin@inforouter.com (text input field)
- Notification Type : Instant (dropdown menu)
- Email Type : HTML (dropdown menu)
- Attach Documents to Email :

At the bottom right of the form area, there are "OK" and "Cancel" buttons. The status bar at the bottom of the browser window shows "Done".

If the system settings allow it, the user can check or uncheck the attachment option. If this checkbox is not checked, users will receive a link to the document instead of the document attachment.

The system administrator should consider disallowing email attachments. This might be a good idea for slow or crowded networks and help save bandwidth.

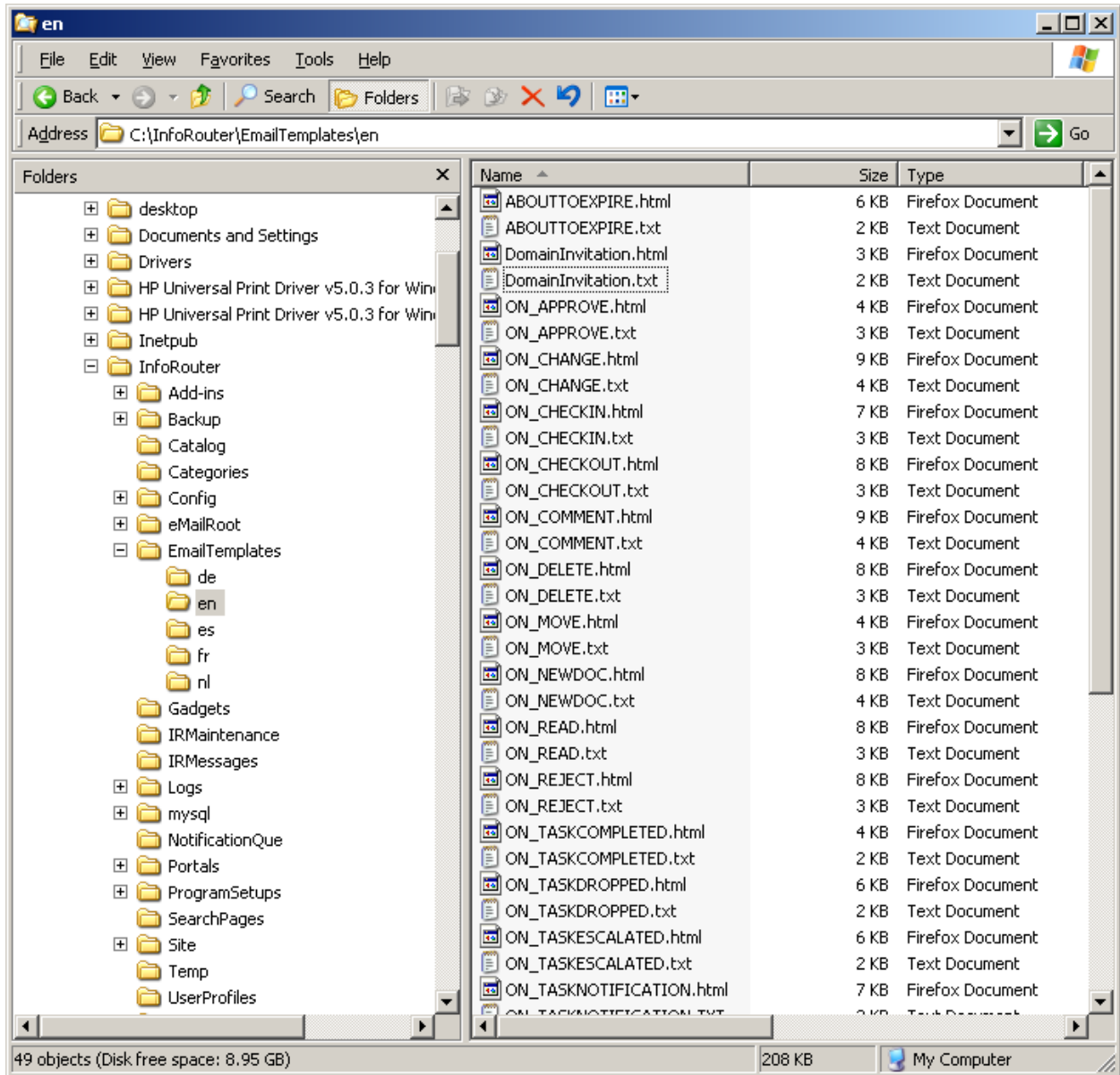
This can be done in the “Email and Notifications” section of the infoRouter Control Panel. Specifying an attachment size limit is also a good idea in cases where documents can be pretty large.

Note: When the document attachment size limit exceeds, a link to the document is supplied instead of the document attachment.

## Email Templates

InfoRouter uses email templates when sending emails. These templates can be found under the following path “c:\inforouter\email templates.”

Notice that these email templates are grouped according to the available language settings.



Note:

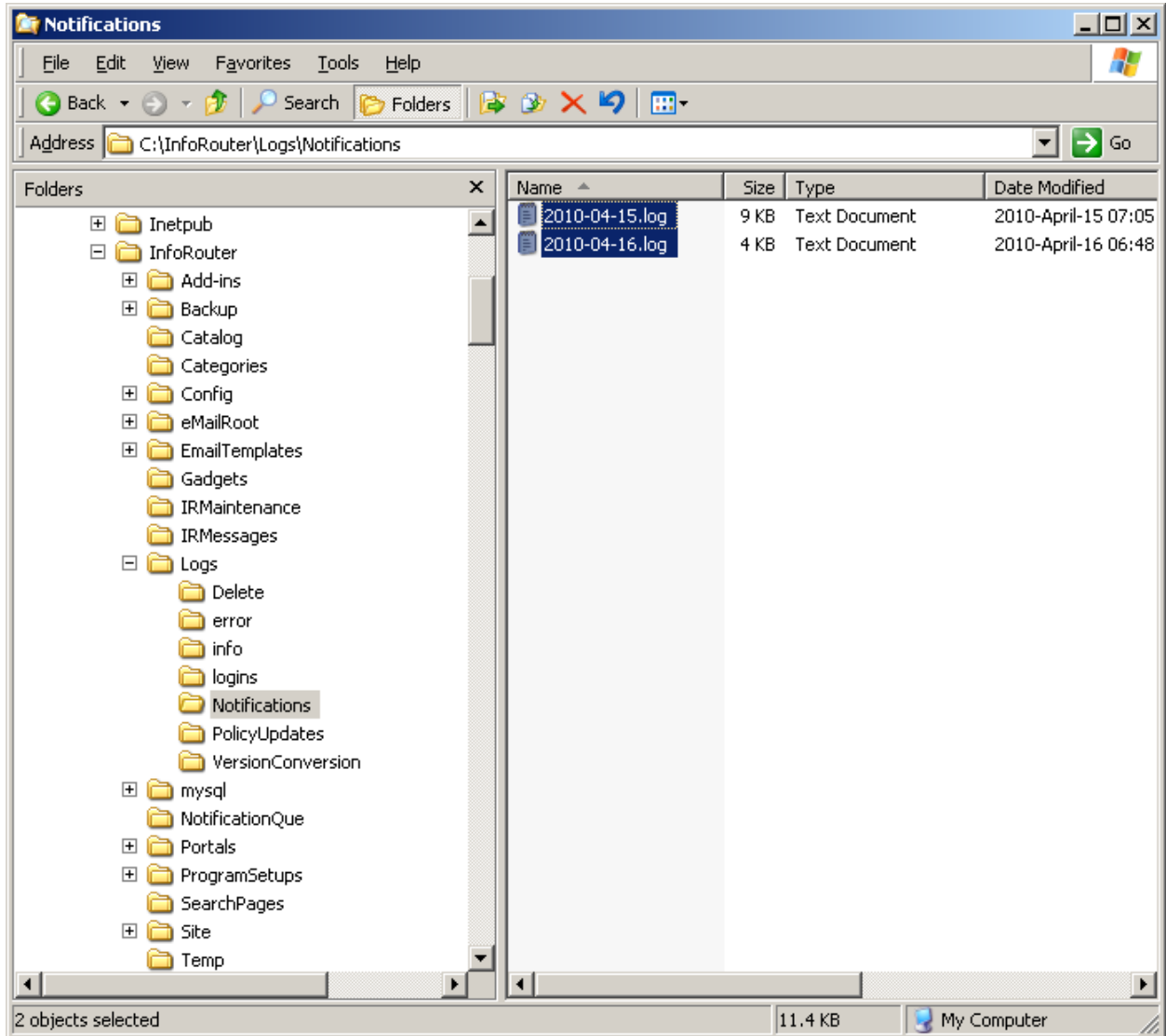
Do not edit these templates, as they will be replaced with their originals when Live Update is run.

If you would like to edit these templates or personalize them to fit your needs, please create a copy and rename the template with the “custom.” prefix.

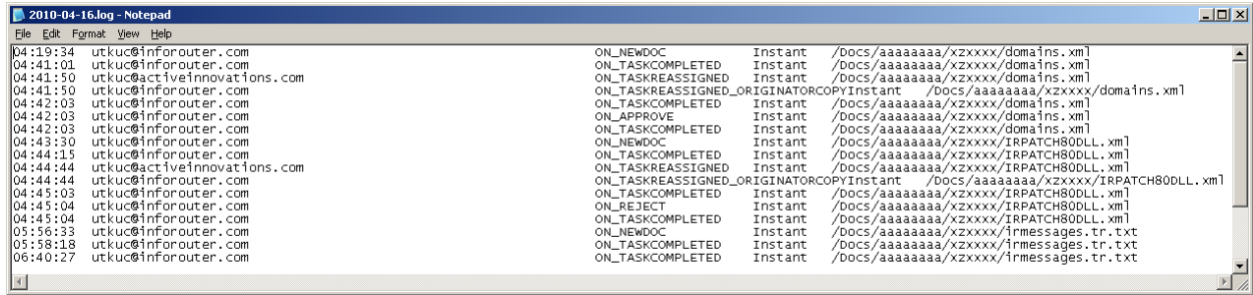
Example: The “ON\_READ.txt” email template can be personalized by creating a copy and renaming the copy as “custom.ON\_READ.txt”. The personalized copy must be left in the same directory as the original template.

## Email Logs

infoRouter email logs are kept in a folder called “Notifications” under the “Logs” folder of the application directory. Each email is logged in a separate log that is kept daily.



The image below demonstrates that each line in the log file denotes an email sent by infoRouter on that day.



```
2010-04-16.log - Notepad
File Edit Format View Help
04:19:34 utkuc@inforouter.com ON_NEWDOC Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:41:01 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:41:50 utkuc@activeinnovations.com ON_TASKREASSIGNED Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:41:50 utkuc@inforouter.com ON_TASKREASSIGNED_ORIGINALCOPY Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:42:03 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:42:03 utkuc@inforouter.com ON_APPROVE Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:43:30 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/domains.xml
04:44:15 utkuc@inforouter.com ON_NEWDOC Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
04:44:44 utkuc@activeinnovations.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
04:44:44 utkuc@inforouter.com ON_TASKREASSIGNED_ORIGINALCOPY Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
04:45:03 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
04:45:04 utkuc@inforouter.com ON_REJECT Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
04:45:04 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/IRPATCH80DLL.xml
05:56:33 utkuc@inforouter.com ON_NEWDOC Instant /docs/aaaaaaaa/xzxxx/irmessages.tr.txt
05:58:18 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/irmessages.tr.txt
06:40:27 utkuc@inforouter.com ON_TASKCOMPLETED Instant /docs/aaaaaaaa/xzxxx/irmessages.tr.txt
```

Once the email is passed on to the SMTP server to be mailed, infoRouter can no longer keep track.