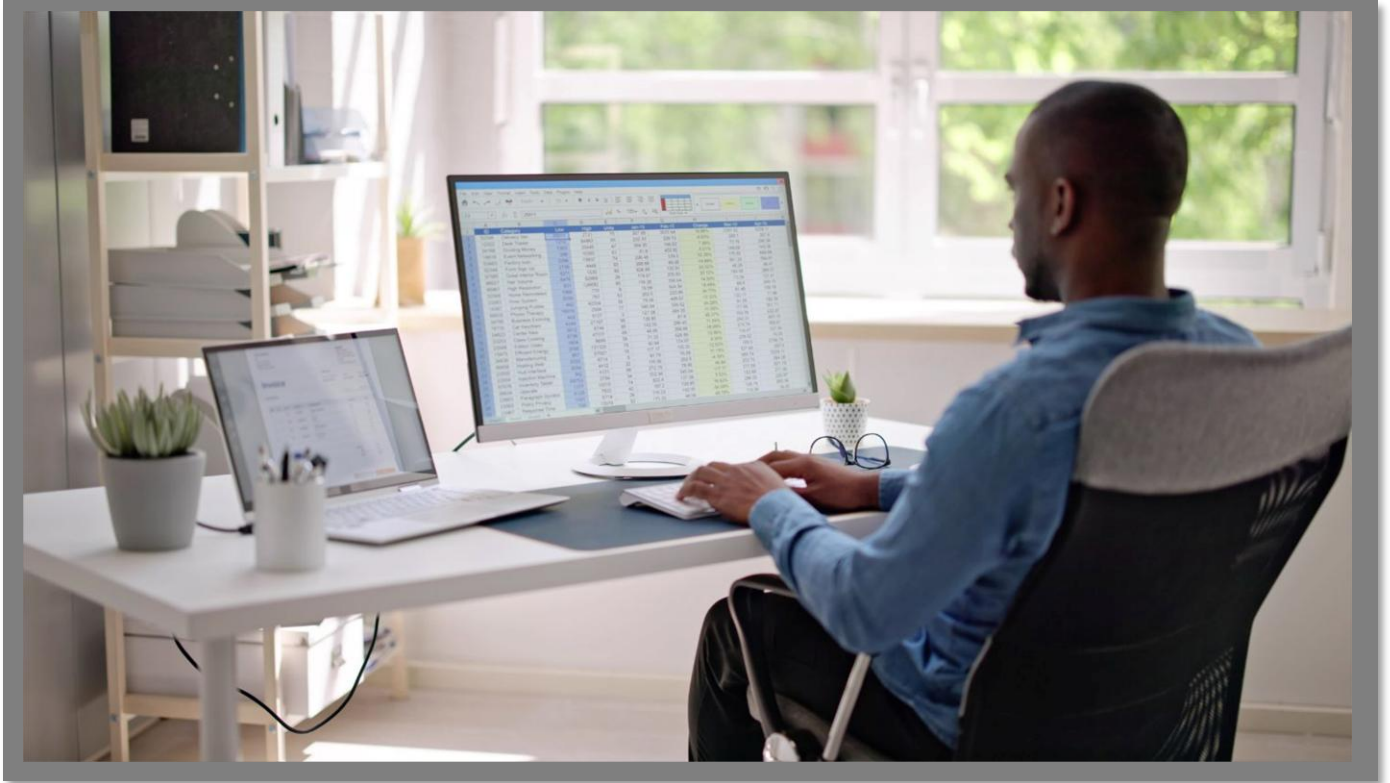


Email CONFIGURATION GUIDE



Arbutus Connectors

Contents

A. Introduction	1
B. About Email.....	1
C. Determining if the Connector exists prior to configuring	2
D. Configuring the Connector after it has been installed	3
E. Editing the DSN properties – the Basic and Advanced tabs .	6
E1. Editing the DSN properties in the Basic tab	6
E2. Editing the DSN properties in the Advanced tab	10
F. Other questions and/or request for assistance	12

Arbutus Connectors

Arbutus Connector – Email

A. Introduction

The purpose of this Guide is to provide assistance with configuring the Arbutus Email Connector using the ODBC Data Source Administrator. The configuration process can involve several technical steps that require a good understanding of IT systems and database management.

To make the most of this guide, it's advisable to have a good understanding of database connectivity, driver installation, and system settings. The ODBC Data Source Administrator, which is used as part of the configuration process, allows for the setup and management of data sources, enabling applications to access data from various database systems.

Due to the complexity and potential impact of these configurations, it is recommended that only those individuals with IT or database expertise undertake this task. In addition, it should also be understood that each client's network environment is different. A one-size-fits-all approach is rarely effective, as what works well in one environment may not be suitable in another.

B. About Email

Email, in the context of an application, refers to a system that allows users to send, receive, and manage electronic messages over a network. It typically includes features such as composing messages, attaching files, organizing emails into folders, and using protocols like IMAP or POP to access mail servers.

In email systems, data is stored on servers using different protocols and methods to manage incoming and outgoing messages. For example, SMTP (Simple Mail Transfer Protocol) server handles outgoing emails, so when you send an email it goes through SMTP server, which then routes it to the recipient's email server. IMAP/POP3 servers handle incoming emails.

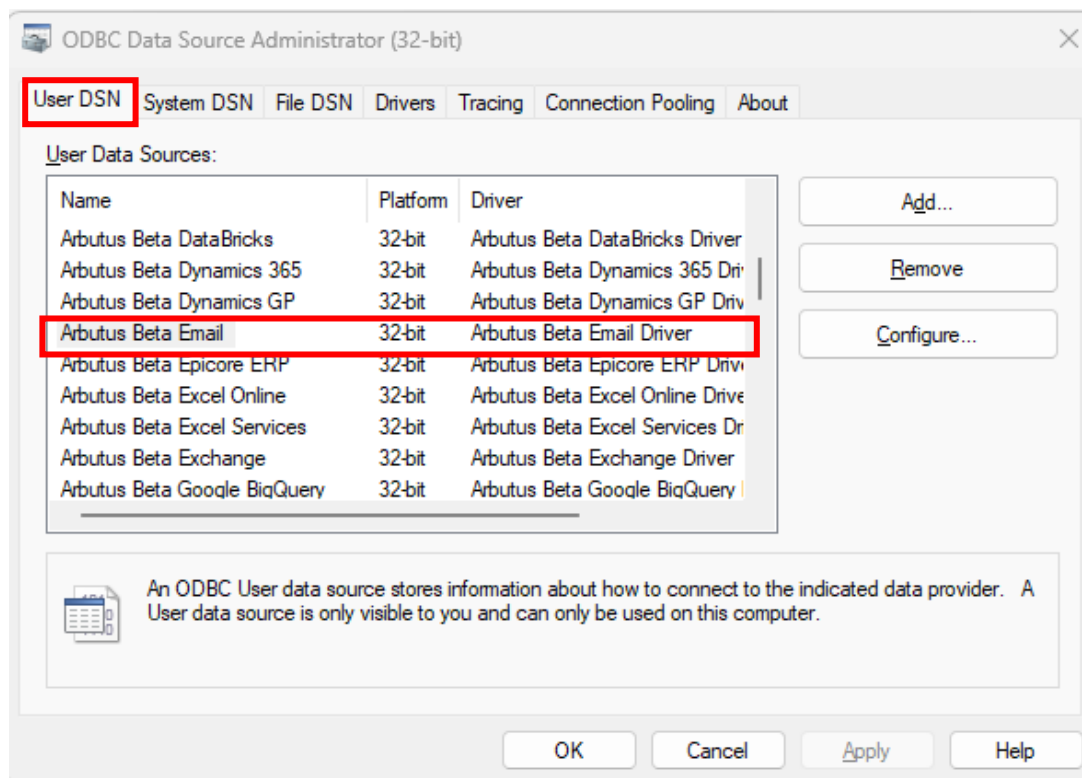
Arbutus Connectors

C. Determining if the Connector exists prior to configuring

Installation of the Arbutus Email Connector is done at the time of installing the Arbutus software. For more information on this, please see the **Overview Guide Document**.

Once the Connector has been installed, the next step is to configure it.

Prior to configuring it, you can check to see if the Connector has been installed by opening the **32-bit ODBC Data Source Administrator**, pictured below, and clicking the **User DSN** tab. Included below is information on how you can access the **ODBC Data Source Administrator**.



Arbutus Connectors

- If the Arbutus Email Connector appears in the list, it can be considered as installed.
- If it is not listed, it is likely that you did not select it during the installation or modification of the Arbutus software. In this case, it is recommended to reinstall the Arbutus software and choose the **Modify** option when prompted. For more details, please refer to the **Overview Guide Document**.

Below is the file path to access and run the **ODBC Data Source Administrator** application:

C:\Windows\SysWOW64\odbcad32.exe

Alternative, you can also try locating and opening the **ODBC Data Source Administrator** application by doing a search on your desktop application.

D. Configuring the Connector after it has been installed

Once you have verified that the Arbutus Connector has been installed, it is time to configure it.

This process is done using the **ODBC Data Source Administrator**. It can be described as “**editing the DSN configuration**”.

DSN, Drivers, and Data Sources

What is a DSN? DSN stands for Data Source Name, and is a unique name used to create a data connection to a database using open database connectivity (ODBC).

A DSN is a data structure that contains the information required to connect to a database. It is essentially a string that identifies the source database, including the driver details, the database name, and often authentication credentials and other necessary connection parameters. DSNs facilitate a standardized method for applications to access databases without needing hard-coded connection details, enhancing flexibility and scalability in database management.

Arbutus Connectors

- **Drivers** are the components that process ODBC requests and return data to the application. If necessary, drivers modify an application's request into a form that is understood by the data source. The **Drivers** tab in the **ODBC Data Source Administrator** dialog box lists all drivers installed on your computer, including the name, version, company, file name, and file creation date of each driver.
- **Data sources** are the databases of files accessed by a driver and are identified by a data source name (DSN). You use the ODBC Data Source Administrator to add, configure, and delete data sources from your system.

All ODBC connections require that a DSN be configured to support the connection. When a client application wants to access an ODBC-compliant database, it references the database using the DSN.

The types of DSNs are:

- **User DSN** – User DSNs are local to a computer and can be used only by the current user. They are registered in the HKEY_Current_USER registry subtree.
- **System DSN** – System DSNs are local to a computer rather than dedicated to a user. The system or any user with privileges can use a data source set up with a system DSN. System DSNs are registered in the HKEY_LOCAL_MACHINE registry subtree.
- **File DSN** – File DSNs are file-based sources that can be shared among all users who have the same drivers installed and therefore have access to the database. These data sources need not be dedicated to a user nor be local to a computer. File data source names are identified by a file name with a .dsn extension.

User and system data sources are collectively known as *machine* data sources because they are local to a computer.

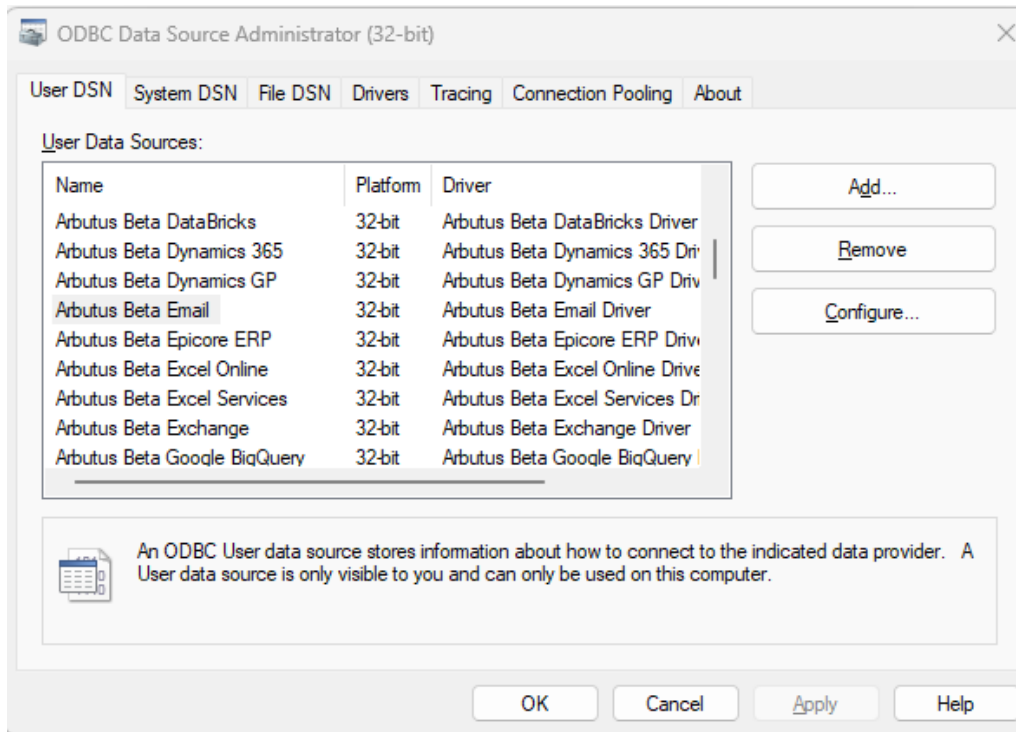
Each of these DSNs has a tab in the **ODBC Data Source Administrator** dialog.

The Arbutus ODBC Driver for Email enables real-time access to IMAP data, directly from any applications that support ODBC connectivity, the most widely supported interface for connecting applications with data.

Arbutus Connectors

Follow these steps to edit the DSN configuration and configure the Connector.

1. First open the **ODBC Data Source Administrator**.



2. Click the **User DSN** tab.

Selected data connectors are installed as **User DSN's** in Window's 32 Bit **ODBC Data Source Administrator**.

Also, each of the data connector's names is prefaced with Arbutus, for example, **Arbutus Email**.

3. Select the Arbutus Connector, in this case it is **Arbutus Email**.
4. Click **Configure**.

Arbutus Connectors

This opens the **Arbutus Email Driver – DSN Configuration** dialog.

Arbutus Beta Email Driver - DSN Configuration

Connection Data Model

DSN Configuration

Data Source Name: Arbutus Beta Email Test Connection Reset Connection

Connection Properties

Basic Advanced

User *	
Password *	
Server *	
Protocol *	IMAP
Port	
SSL Mode	NONE

User *

The user of the Email account used to authenticate.

OK Cancel Help

E. Editing the DSN properties – the Basic and Advanced tabs

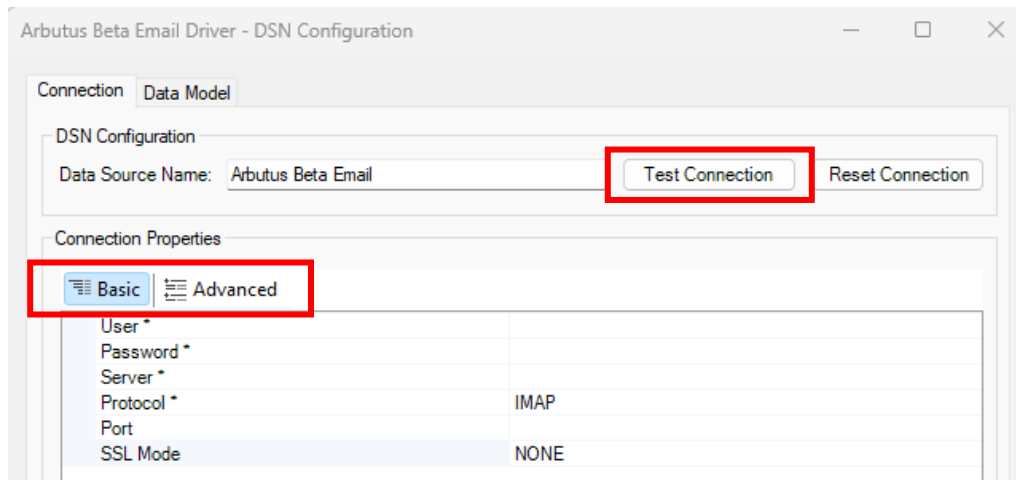
With the DSN Configuration dialog open, the next step is to edit the DSN properties, where necessary, in the **Basic** and **Advanced** tabs. For example, editing the **SSL Mode** property (per screenshot below) to specify the authentication mechanism to be used when connecting to the Email server.

E1. Editing the DSN properties in the Basic tab

The properties listed in the **Basic** tab are typically the ones that are most commonly used, and as such are designed to be more user-friendly and straightforward, allowing you to quickly make changes without needing in-depth technical knowledge.

Arbutus Connectors

Once you have completed editing the properties in the **Basic** tab, you can go ahead and try testing the connection to the Email system by clicking the **Test Connection** button, as highlighted in the screenshot below.



In the **Basic** tab, there are **six** main properties to review:

1. **User** – this is the user of the Email account used to authenticate. Together with **Password** (see below), this field is used to authenticate to the email servers.
2. **Password** – this is the password of the email account used to authenticate. Together with **User** (see above), this field is used to authenticate to the email servers.
3. **Server** – this is the name or address of the mail server. This property specifies the IP address or the domain name of the mail server. It must be set before a connection is attempted and cannot be changed once a connection is in progress.

If this property is set to a domain name, a DNS request is initiated.

Arbutus Connectors

If the connection is configured to use a SOCKS firewall, the value assigned to this property may be preceded with a "*". If this is the case, the host name is passed to the firewall unresolved, and the firewall performs the DNS resolution.

4. **Protocol** – this is the type of email server to connect to. This is a dropdown selection consisting of the following two possible email server types you can choose from:

- **IMAP** – select this want to access and manage your email messages stored on the mail server. IMAP (Internet Message Access Protocol) allows you to view and manipulate your emails directly on the server, which means any changes you make (like reading, deleting, or organizing emails) are reflected across all devices connected to that email account.

If you need to access your emails from multiple devices and want to keep them synchronized, IMAP is the better choice compared to POP (Post Office Protocol), which downloads emails to a single device and doesn't sync changes back to the server.

- **POP** – select this when you want to download your emails from the mail server to your local device. POP (Post Office Protocol) is designed for situations where you want to access your emails offline and store them locally.

However, keep in mind that POP does not synchronize emails across multiple devices. If you read or delete an email on one device, those changes won't be reflected on other devices.

The default value is **IMAP**.

Arbutus Connectors

5. **Port** – this is the port of the mail server. The default value is 143 for IMAP and 110 for POP.
6. **SSL Mode** – this is the authentication mechanism to be used when connecting to the Email server. This is a dropdown selection consisting of the following four possible authentication mechanisms you can choose from:
 - **AUTO** – select this when you want the system to automatically determine whether to use SSL (Secure Sockets Layer) based on the server's capabilities and requirements.

Using the AUTO property can be particularly useful if you're unsure about the server's SSL requirements or if you want to ensure that SSL is used whenever possible without having to manually configure it.

- **NONE** – select this when you do not want to use SSL (Secure Sockets Layer) for your email connection. This means that your connection will not be encrypted.

However, keep in mind that using SSL is generally recommended for security reasons, as it encrypts your data and protects it from being intercepted during transmission.

- **EXPLICIT** – select this when you want to manually specify that SSL (Secure Sockets Layer) must be used for the connection. This setting ensures that the connection will only be established if SSL is available and enabled on the server.

Using the EXPLICIT property is a good choice when you need to guarantee that your connection is secure and encrypted.

Arbutus Connectors

- **IMPLICIT** – select this when you want to ensure that SSL (Secure Sockets Layer) is used from the very beginning of the connection process. This mode is typically used when connecting to servers that require SSL to be enabled immediately upon connection.

Using the IMPLICIT property is a good choice when you need to guarantee that the entire connection process is encrypted from the outset.

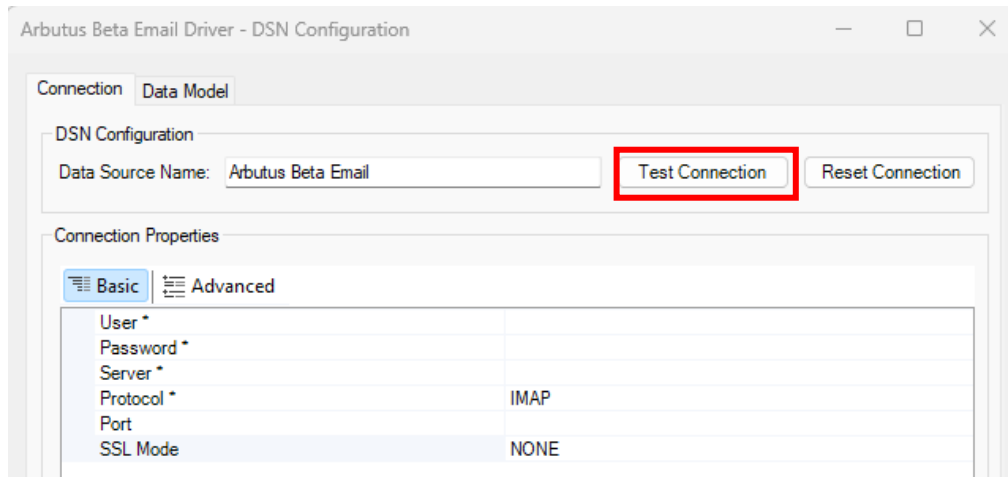
The default value is **NONE**.

E2. Editing the DSN properties in the [Advanced tab](#)

This tab includes more detailed and technical properties. It is intended for those users who need more control over the configuration and are comfortable with more complex options. The **Advanced** tab often includes properties that can fine-tune the behaviour of the system feature.

If you have already completed editing the properties in the **Basic** tab, as required, you do not necessarily need to also complete editing the properties in the **Advanced** tab. Instead, once you have completed editing the properties in the **Basic** tab, you may opt to proceed to testing the connection to the Email system by clicking the **Test Connection** button.

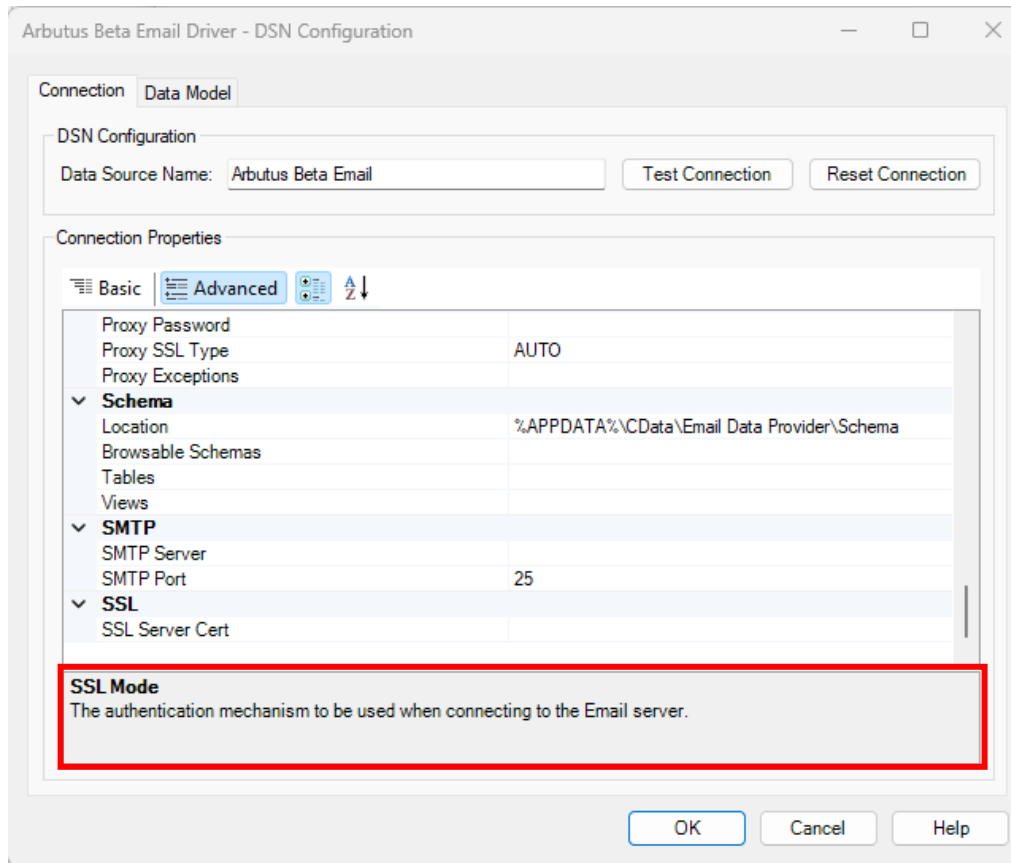
Arbutus Connectors



There are a lot more properties included for editing in the **Advanced** tab.

However, it is useful to know that each property does provide a short description of it and as such serves as a guide in terms of what to edit and/or enter. This short description can be seen at the bottom of the **DSN Configuration** dialog box, as seen in the screenshot below.

Arbutus Connectors



If it is deemed necessary to complete some/all the properties in the **Advanced** tab, it is recommended that you refer to the description shown for any of the properties being edited and/or entered.

If required, more information on the properties listed in the **Advanced** tab can also be provided.

F. Other questions and/or request for assistance

There may be times when you need to consult with the technical support team at Arbutus Software. If so, please send an email request to support@ArbutusSoftware.com.

For more information, please refer to the [CONTACT US](#) page on our website.