

# **BiblioTECH Library System**

**Version 8**

## **“SMTP Gateway” Manual**

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*Note: This manual is being continually updated – the latest version is available via our web site*

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## What is the BiblioTECH “SMTP Gateway Engine”?

The BiblioTECH “SMTP Gateway” Engine is standard Microsoft Windows service.

This engine is not included in the core BiblioTECH Server installation. However, if needed, it can be downloaded from the BiblioTECH web site and installed on the BiblioTECH core server computer.

BiblioTECH has the ability to send email messages in bulk. While the actual messages are generated by the core server and queued ready for sending, the actual sending of these messages is achieved via the SMTP Gateway Engine.

### **Installation Prerequisites**

- The BiblioTECH “SMTP Gateway” Engine SETUP executable  
(download from [www.bibliotech.com.au](http://www.bibliotech.com.au))
- A BiblioTECH System - Version 8.5 or later
- A Windows “Administrative Level” UserID & password
- A ‘local’ SMTP Email server which can forward messages to the target recipients and is fully operational  
(“local” means that the SMTP server must be accessible from the BiblioTECH server)

## Installing the SMTP Gateway Engine

On the BiblioTECH server computer ...

- if a previous version is installed, use Windows Service Manager to stop the service
- login to the server using a full Administrative account
- download and copy the installer *setup\_BT8smtp\_8\_5x[xxx]* to the server computer
- Run the installer – accepting all defaults.

## Configuring the SMTP Gateway Engine

When a message is to be sent (either from a “Letter” report or from an automated system), it is queued on the BiblioTECH server. Periodically, the SMTP Gateway service will check the queue folder and, if any messages are found, a batch of messages from the queue will be forwarded.

*Default : 10 messages every 3 minutes – this is to ensure the SMTP Gateway is not seen as a SPAM source and blocked.*

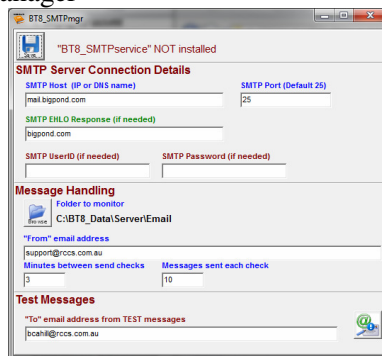
In order for the SMTP Gateway service to be able to forward messages, it needs to be configured appropriately. Depending on the email facilities that you will use, you will need to configure and test the operations of the SMTP Gateway.

### Basic Configuration

Ensure that the SMTP Gateway service is installed as a Microsoft Windows Service.

*NB If you start the service using “Windows Service Manager” and the settings are invalid, the service will stop.*

Open the BiblioTECH SMTP Gateway Manager



<i>SMTP Host</i>	The IP address of your local SMTP server
<i>SMTP Port</i>	The port used by your local SMTP server
<i>EHLO Response</i>	If your local SMTP server utilises an EHLO check, enter a response which would be acceptable to the SMTP server (leave empty if EHLO not used)
<i>SMTP UserID</i>	If your local SMTP server requires a login, enter a valid SMTP-UserID (leave empty if the does not require login)
<i>SMTP Password</i>	If your local SMTP server requires a login, enter the match password to above UserID (leave empty if the does not require login)
<i>Folder to Monitor</i>	Select the folder used to store the queued email messages (refer to BiblioTECH Support if you need to change this from the default)
<i>From email address</i>	Enter a valid email address which will be used as the sending address on all messages
<i>Minutes between checks</i>	The cycle time between checking of the email queue
<i>Messages sent each check</i>	This is the maximum number of messages sent each time the SMTP Gateway checks the email queue
<i>Test To Address</i>	The destination email address used when you click on the [Test] button

After the changes have been made, click on the [Save] button. This will also restart the SMTP Gateway service to ensure the new settings are applied.

### **“From” Address**

All email messages must contain a “senders” address. All messages sent by the BiblioTECH email system will appear to come from the configured “From” address. This should be a valid email address (otherwise the messages may get rejected by the SMTP system). To ensure any failure notices and replies are received, you should configure an email client on a convenient computer (ie. the Circulation Desk computer) to access messages sent the “From” address.

### **Basic Testing**

Open the BiblioTECH SMTP Gateway Manager ...

- Ensure the basic configuration has been completed.
- Ensure that the target SMTP Server has permissions set to allow forwarding of messages from the BiblioTECH Server computer.
- Open Windows Explorer to the folder selected as the folder to hold the email queue.
- Click on the [Test] button (a *TMP file should appear in the above folder*)

The next time the SMTP Gateway checks the folder, it will see the file and attempt to send it

- *If you wait for longer than the “check cycle time” and nothing happens, check the SMTP Gateway settings and click on the [Save] button to restart it.*
- *If the Gateway it could NOT forward the message to the SMTP server, the file’s extension will change to BAD  
→ Check the “Test To Email” address*
- *If it successfully forwards the message to the SMTP server, the file will be deleted  
→ Check that the message does in fact arrive at the recipient  
If the message does not arrive, check the SMTP server’s log to determine why the message was not processed*

### **“Letter Reports” Testing**

On the server, open Windows Explorer and navigate to the folder selected as the folder to hold the email queue.

In *Circulation*,

- locate someone who has overdue resources.

In *Patron Manager*,

- create a new group named TEST.
- locate the above patron (note the entered email address and group they are in)
- change their group to the TEST group
- change their email address so that you will receive it

Monitor the server’s queue folder

In *Reports Manager*, run the report “Letters – Overdue First”

- Select the TEST group
- When the data has been gathered, select Print and choose “Email”

Verify that a TMP message file does appear in the server’s queue folder and then, after a short while, disappears. Verify that you do receive the overdue message.

If all OK, use *Patron Manager* to reset the patron’s Group and Email Address entries back to their original values.

### **“Auto-Overdue Alert” Testing**

When this feature is enabled, the BiblioTECH server can automatically generate alert email messages ...

- a warning 3 days before a resource is due,
- when it becomes overdue, and
- a reminder 3 days after has become overdue,

The content of these messages can be edited. They are located in the server’s Email queue folder.

If enabled, every day the BiblioTECH server will check at a set time for any resources that fit any of the above situations. If any are found, the server will generate an email message based on the relevant template.

*NB This feature can generate a large number of email messages so you should check that the SMTP Gateway is configured and operating correctly before enabling auto-send.*

### **Testing**

On the server, open Windows Explorer to the folder selected as the folder to hold the email queue.

In *Circulation*,

- locate a patron who has an overdue resource which is due “today”.

In *Patron Manager*,

- locate the above patron (note the entered email address)
- change their email address so that you will receive it
- tick the box to enable Auto-Sending of Overdue Alerts

In *System Utilities*, select the General – Email Handling page

- Ensure the Enable option is ticked and set the time to 6:30 am

Wait till “tomorrow” ...

- Check your email, you should have received an “overdue alert” email.

If all OK, using *Patron Manager*

- reset the patron’s Email address.
- enable any relevant patrons for receiving of Auto-Overdue alert messages.

### **Daily Log**

The BiblioTECH SMTP Gateway maintains a log of the actions it has taken. This Log will be forwarded to the librarian each day (ie it is sent to the configured “From” address).

The librarian should expect to receive this log each day.

Failure to receive the Log is an indication that the email system is not functioning correctly and needs attention.