

Instructions to configure iMail's OAuth Authentication option

Description:

The new iMail OAuth enhancement will provide an option to connect to Microsoft 365 using the OAuth method. Below are instructions.

Pre-Work before adding the enhancement:

Before adding the new option to iMail, we recommend you update your Microsoft 365 account to be able to use the OAuth option to connect to Microsoft 365.

You will want to make sure your Microsoft 365 account is configured for:

- CLIENT_ID
- CLIENT_SECRET
- TENANT_ID
- FROM_ADDRESS

Reference **Helpful Notes to acquiring the OAuth information you will need from Microsoft 365 to use iMail.pdf** for more detailed information.

After you have upgraded to iDocs 8.02 or newer: To configure the OAuth Configuration:

In the upgrade instructions you will have instructions to create a new directory for the use of storing the OAuth Configuration file. Make a note of the directories path as you will be needing it.

Change the iMail Configuration to use the OAuth Configuration

First navigate to the iMail menu (GO IMAIL)

Then select option 1. iMail Configuration

Notice that you have a new field called "Outlook 365 OAuth Config folder"

Insert the value of the newly created directory that will hold the OAuth Configuration file into this field.

Then, blank out the values from the following three fields:

Authentication User Name ...

Authentication Password ...

Authentication Encrypted (Y/N)

For Example:

Configuration Setting	Configuration Value
Domain Name.	infaredactions.com
Organization Name.	Infared Actions
Email Send Method. (SMTP/ESMTP)	SMTP
SMTP Host Mail Server.	smtp.office365.com
SMTP Port.	587
Local Host Mail Client	MS10
Sender Address	example@infaredactions.com
Default From Address	example@infaredactions.com
Default Reply To Address	example@infaredactions.com
Authentication User Name	
Authentication Password	
Authentication Encrypted (Y/N)	
Outlook 365 OAuth Config Folder	/idocs/OAuthFile

Once you have make the changes, select F10=Save to save

Check to see if your new OAuth Configuration file has been created in the OAuth Configuration directory

Use the WRKLNK command to navigate to the OAuth Configure directory. You should see a new object in the directory called "iMailOAuth.config"

For Example:

I used the command **WRKLNK '/idocs/OAuthFile/*'**

```
Work with Object Links

Directory . . . . : /idocs/OAuthFile

Type options, press Enter.
 2=Edit   3=Copy   4=Remove   5=Display   7=Rename   8=Display attributes
11=Change current directory . . .

Opt  Object link      Type      Attribute  Text
___  _____      _____  _____  _____
    iMailOAuth.config  STMF
```

Check to see if your OAuth Configuration file has expected information:

Select the "iMailOAuth.config" file with option 5=Display

Based on the configuration work done on Microsoft 365, you should see information under for your:

- CLIENT_ID
- CLIENT_SECRET
- TENANT_ID
- FROM_ADDRESS

Note: You will need to go back and then select the "iMailOAuth.config" file with option 2=Edit to update these fields with your information from Microsoft 365.

Under the "# Outlook 365 Token & Expiry Time" section of the configuration, you will not have any values inserted to the "TOKEN" or "EXPIRY_TIME" fields. These values will be inserted after your first attempt to send an email, and will automatically update from Microsoft 365.

Under the "# *** Do Not Change ***" section, don't make changes. Leave these values as they are configured. The fields are configured to point to Microsoft 365.

For Example:

```
Browse : /idocs/OAuthFile/iMailOAuth.config
Record : 1 of 12 by 14          Column : 1 75 by 79
Control : _____

.....1.....2.....3.....4.....5.....6.....7.....
*****Beginning of data*****
# Configuration template for Outlook 365 OAuth, JDK 1.7
CLIENT_ID = 3f2cc800-8400-4d71-8b70-3d1f18022079
CLIENT_SECRET = 3f2cc800-8400-4d71-8b70-3d1f18022079
TENANT_ID = 2124e47e-87e7-4a18-b05e-8a90002e1ed
FROM_ADDRESS = nonreply@foradefix.com
# Outlook 365 Token & Expiry Time
TOKEN =
EXPIRY_TIME =
# *** Do Not Change ***
TOKEN_URL = https://login.microsoftonline.com/{TENANT_ID}/oauth2/token
SCOPE = https://graph.microsoft.com/default
ENDPOINT = https://outlook.officeapps.microsoft.com/FromAddress/Email/
*****End of Data*****
```

If the file appears as expected, then we'll go to the next step.

Let's attempt to send out the initial email

Navigate to the iMail menu (GO IMAIL)

Select option 12. Send Email Message to send out your first email

If the email is sent and received successfully, then your configuration was configured successfully. Run additional test. Once your testing is successfully complete, you can continue to the next step and apply the new objects to your current iDocs library.

If the email test was not successful, you will need to troubleshoot the configuration.

Helpful hints to troubleshoot:

-Review the "iMailOAuth.config" file for accuracy of the values used.

-Review the job log for information about the transmission. You can select the [Shift] + [Esc] keys, and then select option 3, and then option 10. Display job log, if active, on job queue, or pending

If you need help, reach out to inFORM Decisions support.

*** End ***