



# DataMotion Adapter Guide for SecureMail

December 15, 2014

Part # 050010-01

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## REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

### **Version 1**

Initial version of this document, which provides information on DataMotion Adapter v3.8. This document incorporates content from previously published documents. Some of the information in this document was previously published in the following documents:

- *DataMotion Adapter Integrator's Guide*, v. 2.1 (last published October 23, 2011).

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## About This Publication

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### BRIEF DESCRIPTION

The DataMotion Adapter (DMA) provides an automated means for polling selected user accounts on the DataMotion Secure Message Server and retrieving their messages and/or file attachments through a secure channel. It downloads them into the local file system of the host computer where the DMA is installed, so they can be accessed and used by other application programs.

This publication documents the installation, configuration, and operation of the DMA.

**NOTE: This publication documents DataMotion Adapter v3.8 and later.**

### INTENDED AUDIENCE

This publication is intended for a technical audience, including engineers, developers, programmers, system administrators, and system and application integrators.

Additional technical documentation, as well as user documentation, is also available from DataMotion. See [DataMotion Documentation](#) on page 2.

### HOW TO USE THIS PUBLICATION

The content is organized as follows:

***About This Publication.***

Provides an overview of the content of this publication and how to use the publication.

***Chapter 1) Introduction***

Provides an overview of the DataMotion Adapter, including a description of its features.

***Chapter 2) Installing the DataMotion Adapter***

Provides step-by-step instructions to install the DataMotion Adapter.

***Chapter 3) Using the DataMotion Adapter***

Describes in detail how to configure, operate, test, and troubleshoot the DataMotion Adapter.

**Chapter 4) DataMotion Adapter Files**

Provides information on some pertinent DataMotion Adapter files and related information.

**Appendix A: Supplemental Information**

Provides supplemental information on *Filtering, Downloading, Saving, Deleting, and Track Sent*.

## RELATED INFORMATION

### DATAMOTION DOCUMENTATION

- *DataMotion SecureMail Software Development Kit Technical Reference Manual* (part # 050002)  
Documents the Application Programming Interfaces (APIs), and system development, maintenance, and administration tools for partners, developers, system integrators and administrators to provision and manage the system, and to customize and integrate with existing workflows.
- *DataMotion SecureMail User Guide* (part # 050004)  
Provides instructions for using the products.
- *DataMotion SecureMail Administration Guide* (part # 050006)  
Documents the system installation, maintenance, and administration tools for administrators and integrators.

Additional documentation is available on many other topics. Please contact DataMotion Customer Service for more information.



## 1

## Introduction

### OVERVIEW

The DataMotion Adapter (DMA) provides an automated means for polling selected user accounts on the DataMotion Secure Message Server and retrieving their messages and/or file attachments through a secure channel. It downloads them into the local file system of the host computer where the DMA is installed, so they can be accessed and used by other application programs.

**NOTE: When this document refers to secure “messages,” it is meant to include both messages and/or file attachments, unless it is explicitly stated otherwise or obvious from the context that it applies only to the message body without attachments.**

The DataMotion Adapter (DMA) is a utility program and a Windows service.

- The DMA Utility program (DownloadManager.exe) allows you to configure the operation of the DMA Service and to start, stop, and restart the service. It also provides logging and testing tools.
- The DMA Service is a background Windows service named DataMotion Adapter that polls for messages and downloads them to the local host based on the DMA configuration.

**NOTE: The local host, or client, computer is the computer on which the DMA is installed and which downloads messages from the DataMotion Secure Message Server.**

One way that DMA can be used is to install it on desktop PCs so that individual users can access directly from their PCs secure email and attachments sent to them through the DataMotion Server. (When using the DMA, desktop users do not need to log into the DataMotion Server to retrieve their secure messages, nor do they need to be aware of the secure email account or the desktop service that supplied these files.) This usage is not very common because DataMotion SecureMail can be used on a variety of clients, including smartphones, tablets, as well as desktop clients.

Another way that DMA can be used is to install it on a server so that it provides an application program with message and file content for purposes of customization. For example, an Electronic

Health Record (EHR) vendor could incorporate into their systems the data submitted in DataMotion Secure eForms, and the DMA provides an automated way to accomplish this, as well as many other things.

The DMA Service uses an SSL connection to the DataMotion Messaging Web Service (CMv4) to download messages securely to the client via SOAP. Messages can be retrieved in standard SMTP format, allowing them to be opened in email clients (such as Microsoft Outlook Express, Windows Live Mail, or Thunderbird) or to be parsed by third-party software packages. The DMA can also be configured to expand DataMotion messages and save their attachments separately, and optionally, it can deliver the text and HTML bodies into the file system for direct access to the message parts with no MIME parsing required. By default, downloaded messages are saved in the Downloads folder under the DMA installation folder.

## FEATURES

The DataMotion Adapter Utility allows you to select the secure accounts to be polled on the DataMotion Secure Message Server, supply the required credentials, establish the polling interval, filter the messages to be retrieved from the user's secure messaging account, and control the format of how those messages are stored on the local host, among other things.

The DataMotion Adapter provides the following features:

- The DMA Utility program provides a Graphical User Interface for configuration, administration, and testing of the DMA Service. The Testing options include the ability to verify proper communication with the DataMotion Server and to perform a Download for any configured user account.
- The DMA Service polls secure message accounts on a DataMotion Server and securely downloads messages and/or attachments over SSL to the local host file system.
- The DataMotion Server can be cloud-hosted or on-premises.
- Multiple user accounts can be serviced from one configuration with the option to customize download settings for each user.
- The polling interval is configurable.
- You can specify filtering options to download messages according to your criteria, including:
  - » Download messages from the Inbox folder only, or from the Inbox folder and its subfolders, or from a specified folder.
  - » Download all messages or only those with attachments.
  - » Download Unread messages only (“New” messages), or download all messages (both Read and Unread) that have not already been downloaded. This option allows you to keep a cache on the local host of those messages that have been opened or Read (“Old” messages). Therefore, you can choose to cache Read messages on the local host, the DataMotion Secure Message Server, or both.

- You can select the location to save the downloaded files and you can specify whether you want the messages to be saved in sub-folders that identify the recipient, the sender, and the Message ID.
- You can also specify file format and save options for downloaded messages and attachments, and you can specify filtering for attachments. Save Options include:
  - » MIME-encoded EML file (a single file in standard SMTP format).
  - » Body and Attachments as Separate Files (the message body is saved as a text and/or HTML file).
  - » Only Body (the message body is saved as a text and/or HTML file).
  - » Only Attachments (the message body is not saved).
  - » Only Attachments Matching One or More File Patterns (the message body is not saved).

For all Save methods: When new messages are downloaded, Track Sent Messages will report they have been opened and trigger notification to the senders. This includes message body and all attachments (if any).

- Messages can be deleted from the DataMotion Server after being downloaded.
- The DMA Service can log its activity, and you can specify the location for the log files. The Logging Level is configurable and includes a Test Mode that can be used to diagnose issues or test the DMA Service.
- DMA provides an application hook; that is, a way to hand off the downloaded messages and attachments to an application program. This allows application programs to process the content and customize it to fit a given workflow.

## HOW TO SET UP THE DATAMOTION ADAPTER (A SUMMARY)

For requirements, see:

- [Installation Requirements](#) (on page 6)
- [Operating Requirements](#) (on page 11)

To set up the DataMotion Adapter, perform the following steps:

1. Install the DMA software on the local computer: Use the instructions in [Chapter 2](#) [Installing the DataMotion Adapter](#) on page 6.
2. Configure and test the DMA Service: Use the instructions in the [Chapter 3](#) section [Configuring the DataMotion Adapter](#) on page 12.
3. Start the DMA Service: Use the instructions in the [Chapter 3](#) section [Operating the DataMotion Adapter Service](#) on page 28.
4. If you encounter any problems, refer to [Troubleshooting](#) on page 29.

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## 2

# Installing the DataMotion Adapter

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To obtain the DataMotion Adapter (DMA), you may download it from the DataMotion Server. You will find it under the “Client Downloads” section in your Member Center. If you do not see “DataMotion Adapter” in the drop down list or do not see Client Downloads in your Member Center, you do not have permission to download this product. In this case, you should contact your support representative to inquire about adding this functionality to your account.

### INSTALLATION REQUIREMENTS

**NOTE:** See also *Operating Requirements* on page 11.

Before installing the DataMotion Adapter (DMA) on a host Windows computer, the host must meet the following requirements:

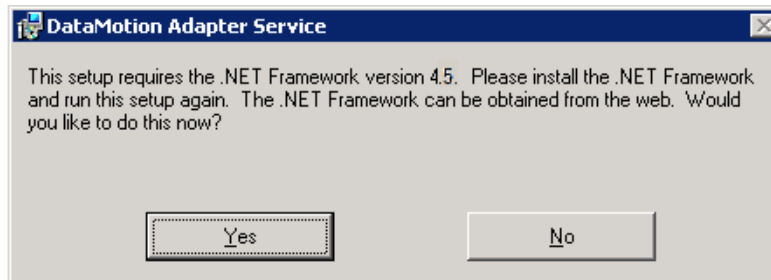
- You must have administrator privileges on the host computer to install the software package.
- The host computer must use Windows 7, Windows 8, or Windows Server 2008R2 or greater.
- Prior to running the DMA Service, the host computer must have installed Microsoft .NET Framework v4.5 or later, either the .NET 4.5 Client Profile or 4.5 Full/Extended.

**NOTE:** The DMA setup program detects if the .NET Framework is installed, and if not, it will initiate a wizard to obtain it.

### SETUP PROCEDURE

The DataMotion Adapter Windows Installer Package file is named similar to SetupAdapterXXX.msi (where XXX represents the version number). It contains all files necessary for the successful installation of the DMA Service. The following setup assumes that you have downloaded or copied the DataMotion Adapter Windows Installer Package file to a folder on the host computer.

1. To begin the installation, using Windows Explorer, right click the filename of the DataMotion Adapter Windows Installer Package and select Install, or double-click the filename to run it.
2. If .NET Framework 4.5 or later is not already installed on the host computer, the setup program asks if you want to obtain it now:



- A. Select **Yes**, and the setup program opens a browser window to the Microsoft .NET Framework page so you can download and install it.
- B. On the .NET Framework page, select .NET Framework 4.5.1 (or later) from the .NET Framework Downloads List.

### .NET Framework Downloads

[.NET Framework 4.5.1](#)

[.NET Framework 4.0](#)

[.NET Framework 3.5 SP1](#)

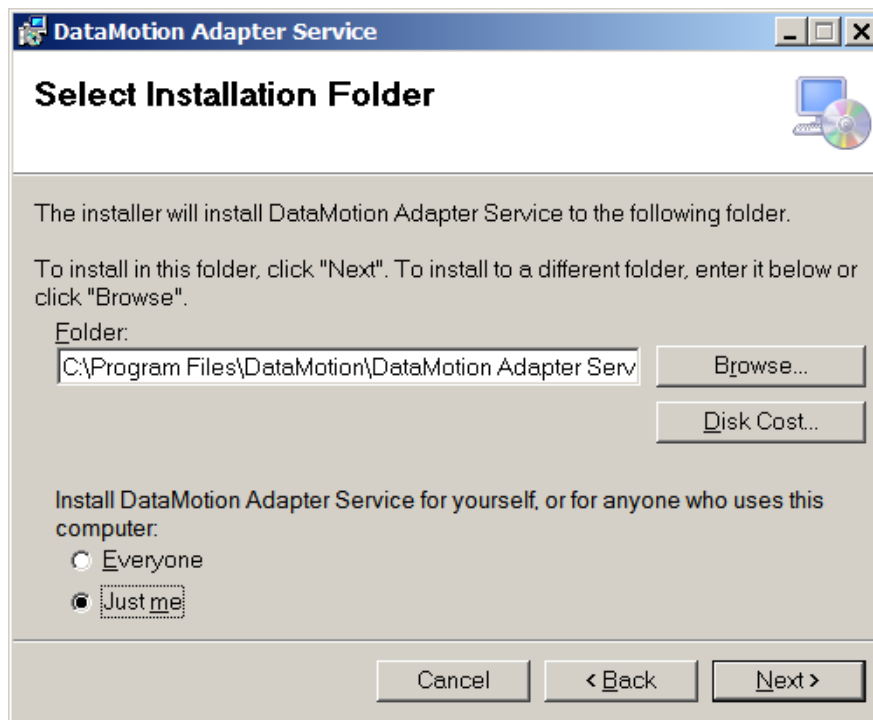
[.NET NuGet packages](#)

[More .NET Framework downloads](#)

- C. Then select **Download** to download and install the .NET Framework package on the computer.
  - D. After you have installed the .NET Framework, you can download and install updates for it using Windows Update, or you can wait until later.
  - E. Once .NET Framework is installed, run the DataMotion Adapter setup program again and continue with the procedure.
3. If the DataMotion Adapter software is already installed when you run the setup program, it will ask if you want to **Repair** or **Remove** (uninstall) the software, and you can select one of these or cancel the setup. Otherwise, if this is a new installation of the software, a welcome screen similar to the following is displayed.



4. Click **Next** to continue. The setup program displays a screen similar to the following asking you to select an installation folder:



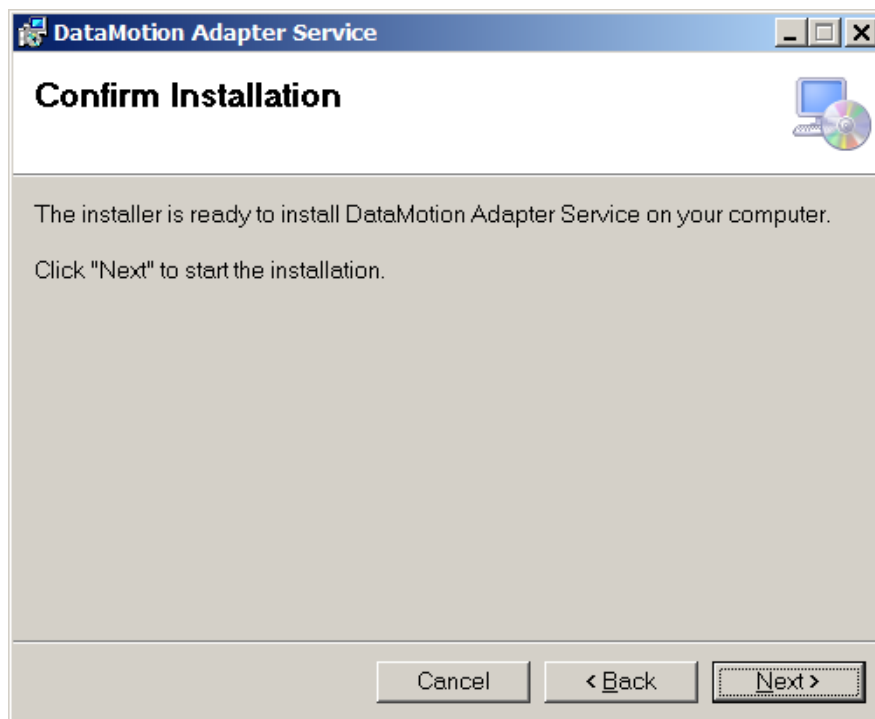
5. To select the **Folder** location where you would like the program installed, click the **Browse** button to browse for and select the program, or enter a fully qualified path and folder name in the text box. The default installation folder is C:\Program

Files\DataMotion\DataMotion Adapter Service, or C:\Program Files\(\x86)\DataMotion\DataMotion Adapter Service if using a 64-bit operating system. (You can click the **Disk Cost** button to determine if your requested location has enough free space.)

After selecting the installation folder, select which users of this host computer you want the software to be installed: **Everyone** or **Just me**.

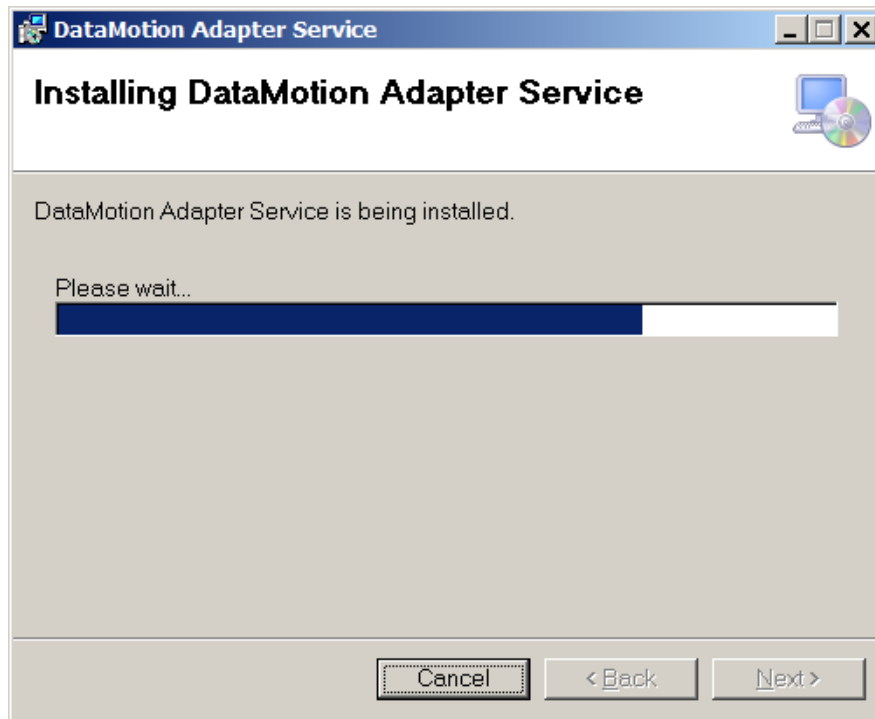
When you are ready, click **Next** to continue.

The setup program verifies that your selections are valid and displays a confirmation screen similar to the following:

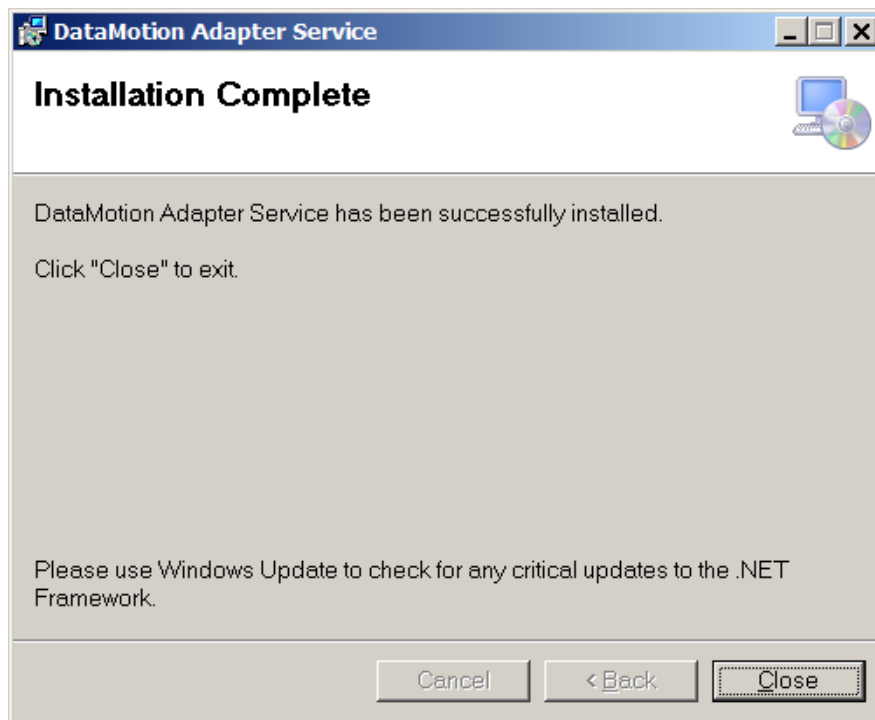


6. When you are ready, click **Next** to install the software.

The setup program installs the software on the host computer while displaying a progress indicator bar.



7. When all the files have been installed, the “Installation Complete” screen is displayed, indicating that the DataMotion Adapter has been successfully installed.



8. Click **Close** to exit the setup program.



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## 3

# Using the DataMotion Adapter

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The DataMotion Adapter (DMA) Utility program allows you to configure the operation of the DMA Service and to start, stop, and restart the service. It also allows you to test the host computer's connection to the DataMotion Server and perform a Download from any user account. This section includes the following information:

- [Operating Requirements](#) (below)
- [Configuring the DataMotion Adapter](#) (on page 12)
- [Operating the DataMotion Adapter Service](#) (on page 28)
- [Troubleshooting](#) (on page 29)

### OPERATING REQUIREMENTS

- To run the DMA Service, the host must be able to use an SSL connection on Port 443 to access the DataMotion Server.
- To download messages from a user account, at least one user must be configured to use the DMA Service.
- To download messages from a user account, you must supply the required user account credentials. The credentials include the User ID or email address and the account password, which are used to identify the account and provide authorization. (To protect the account against unauthorized access, the password is stored as a token.) See also [User ID](#) on page 21.
- To download messages from a user account, the Web Services API Integration feature must be enabled for the account. This feature allows the DMA, and other application programs, to interface with the Web Services API and access the DataMotion Server programmatically. To inquire about enabling this feature, contact your support representative. For information about what happens when the feature is not enabled, see [Troubleshooting](#) on page 29.

## CONFIGURING THE DATAMOTION ADAPTER

You must configure the operation of the DMA Service before using it. The DMA Utility Program allows you to configure the operation and save the settings.

### RUNNING THE DATAMOTION ADAPTER UTILITY PROGRAM

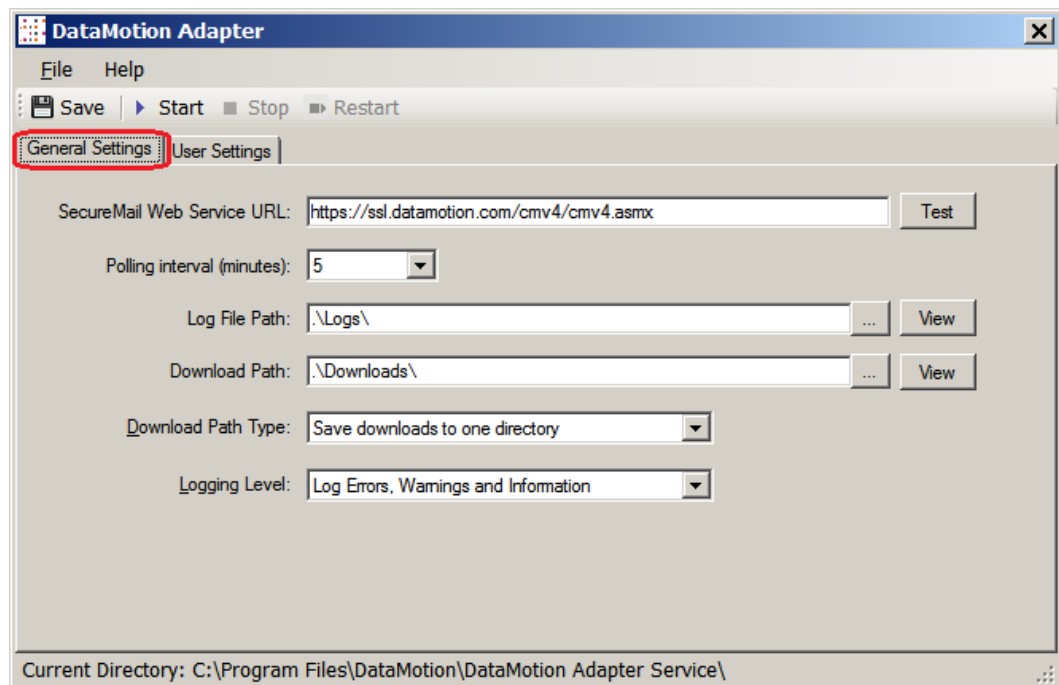
To start the DataMotion Adapter Utility program, click the Windows Start menu, click DataMotion, and then click **DownloadManager**. (Alternatively, you can navigate to the installation folder and run the **DownloadManager.exe** program.)

Before starting the DMA *Service*, you must use the DMA *Utility* to configure these settings:

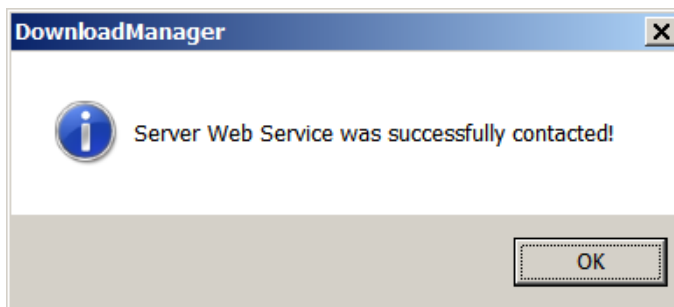
- **General Settings** (below)  
These settings include File and Server Paths, Polling Interval, and Logging Level. In General Settings, you can also test proper communication with the DataMotion Server.
- **User Settings** (on page 16)  
These settings include providing the DataMotion account credentials for the user accounts to be polled and controlling message downloading through message filtering, file format and save options, using a local message cache, deleting server messages after download, and handing off the saved messages to an application program. From the User Settings, you can also perform a Download Now for a configured user.



### GENERAL SETTINGS

1. When you run the DataMotion Adapter Utility program (**DownloadManager.exe**) as described in *Running the DataMotion Adapter Utility Program* above, the utility screen is displayed with the General Settings tab selected, similar to the following:



2. Fill in the applicable fields according to the information that follows:
  - **SecureMail Web Service URL:** Specifies the URL of the DataMotion Server Messaging Web Service (CMv4). If you use a DataMotion cloud-hosted server or an on-premises server, enter that server name in the path. Standard URLs include the following:
    - 📄 For *DataMotion SecureMail* customers:  
https://ssl.datamotion.com/cm4/cm4.asmx
    - 📄 For *DataMotion Direct* customers:  
https://ssl.dmhisp.com/cm4/cm4.asmx
  - **Test button:** Click Test to verify proper communication with the DataMotion Server Web Service. (The DMA uses an SSL connection on Port 443 to access the DataMotion Server Web Service.) If successful, the following message is displayed:



- **Polling interval (minutes):** Specifies how often, in minutes, the DMA Service will poll the DataMotion Server for new messages. When this interval elapses, every user account that is configured and enabled will be polled. Selectable values include: 5, 10, 15, 30, 60. The selected value will depend upon the application. A polling interval of five (5) minutes is common when downloading messages for desktop users.
- **Log File Path:** Specifies the location where log files are written. To specify a subfolder relative to the installation folder, include “.\” in front of the path. The log file path must specify path information only. The DMA automatically generates a filename for each log file as needed. The filename is determined by the date when the log file is created. Each time the DMA Service is started or restarted, a new SVC log file is created. Service logging only occurs while the DMA Service is running. (See [Log Files](#) on page 32.) Enter the path or click the Browse button  to select a folder. Click the **View** button to open the selected folder in an Explorer window. The default location for log files is the Logs folder under the DMA installation folder; that is: “.\Logs\”.
- **Download Path:** Specifies the location where downloaded message files are saved. This is the “root” folder used to store message files; for example: C:\Data\DataMotion Adapter\Downloads\. To specify a subfolder relative to the installation folder, include “.\” in front of the path. The download path must specify path information only. The DMA automatically creates filenames for all saved files as needed. (See [Downloaded Message File Names](#) on page 31 for details.) Enter the path or click the Browse button .

to select a folder. Click the **View** button to open the selected folder in an Explorer window. The default location for saved files is the Downloads folder under the DMA installation folder; that is: “.\Downloads\”. See also **Download Path Type** for more information.

- **Download Path Type:** Specifies the type of directory/folder structure for saving downloaded files. Settings include:
  - » **Save downloads to one directory** – All files will be saved in the **Download Path** folder. *This is the recommended setting.*
  - » **Save downloads to directory tree** – Files will be saved in a directory structure below the **Download Path** folder. For each message, the tree structure under the download path will be as follows:

.\<Recipient-User-ID>\<Sender-Email-Address>\<MID>\

For Example:

```
C:\Program Files\DataMotion\DataMotion Adapter Service\
  Downloads\JohnDoe@Receive.Com\JaneDoe@Send.Com\21274916\
```


The <MID> is the Message ID that is unique on the DataMotion Server. (The MID is displayed in the DataMotion secure messaging web portal as one of the columns in the user’s Inbox.)

If you use this setting, the <Sender-Email-Address> must not contain any non-standard file system characters for the client’s operating system; otherwise the OS will not be able to create the folder and will generate an error. To avoid this, set the download path to **Save downloads to one directory**.

The <Recipient-User-ID> is the user’s email address or User ID. For more information on the <Recipient-User-ID> and non-standard file system characters, see [User ID](#) on page 21.

- **Logging Level:** Enables/Disables logging and specifies the level of detail that is written to the log files. DMA Service logging only occurs while the service is running. (To start the service, see [Operating the DataMotion Adapter Service](#) on page 28.) Settings include:
  - » **Off** – Disables data logging.
  - » **Log Errors** – Logs error information only. Errors indicate that something is configured incorrectly or behaving erratically. For example: “Communication Failure.”
  - » **Log Errors and Warnings** – Logs warnings as well as error information. Warnings are items that may cause concern but are not errors in how the system behaves. For example: “Authentication Failed.”
  - » **Log Errors, Warnings and Information** – Logs error information, warnings, and information. Information includes control items such as when the service is started or stopped, as well as stack trace information when an error occurs. This is the

default setting and is recommended for typical use. It does not increase the log size until an exception occurs.

- » **Verbose Logging – Test Mode** – Logs all DMA actions in very detailed data. This option should not be used except when diagnosing a potential problem. Every time-tick and action is logged, creating a rapidly growing log file.
3. After making changes to the **General Settings**, make sure to save your configuration. To save your configuration, click the **Save** button on the toolbar:  **Save**. Or you can:
    - » Click the **File** menu.
    - » Click **Save Settings**.
  4. After you have completed the General Settings, configure the User Settings according to the information in **User Settings** on page 16.

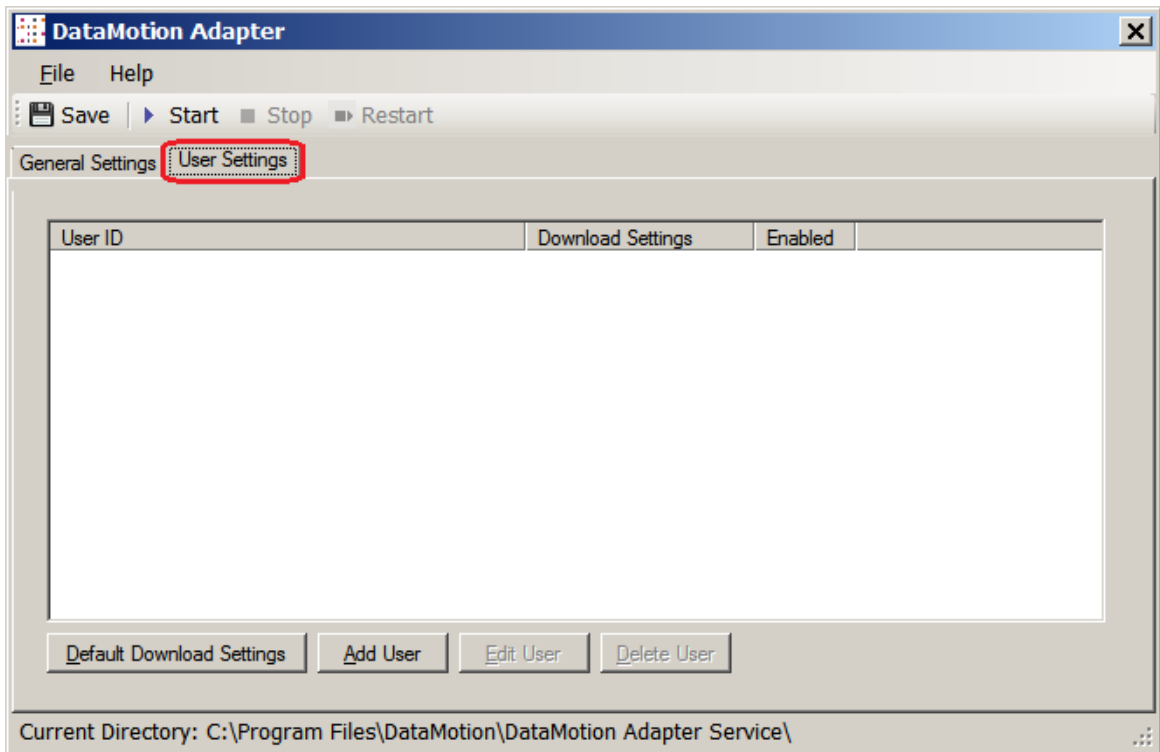
### USER SETTINGS

Before you use the DMA Service, you must configure User Settings.

These settings include providing the DataMotion account credentials for the user accounts to be polled and controlling message downloading through message filtering, file format and save options, using a local message cache, deleting server messages after download, and handing off the saved messages to an application program. From the User Settings, you can also perform a Download Now for a configured user.

The following instructions describe how to configure User Settings.

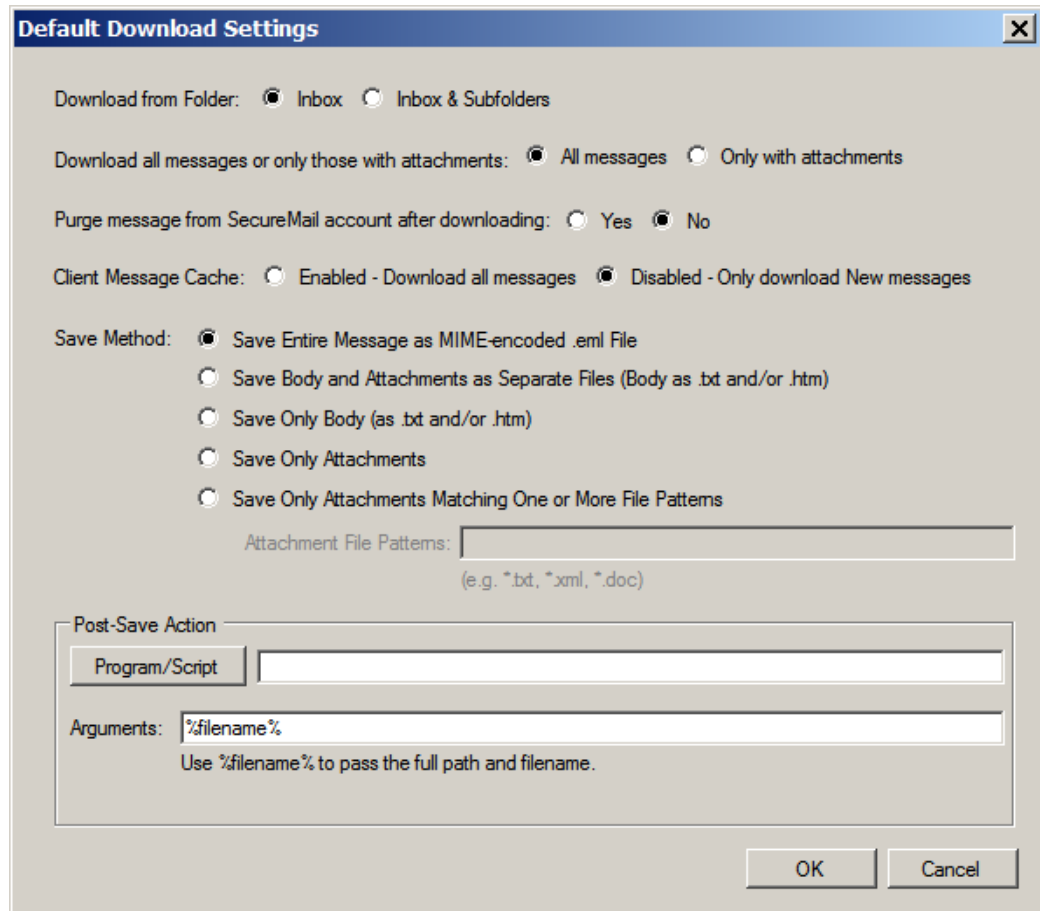
1. If the DataMotion Adapter Utility program is already running, skip this step. Otherwise, run the DMA Utility program as follows: Click the Windows Start menu, click DataMotion, and then click **DownloadManager**.
2. Click the User Settings tab to display a screen similar to the following:



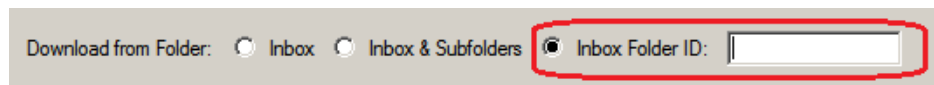
### Default Download Settings

Default Download Settings apply to all users. You can override these settings for individual users through Custom Download Settings (see [Add User and Customize Download Settings](#) on page 21).

1. Click the **Default Download Settings** button, and the program opens the Default Download Settings dialog, similar to the following, which allows you to configure default settings for all users.



2. Fill in the applicable fields according to the information that follows:
  - **Download from Folder:** Specifies whether to download messages from the Inbox folder only or the Inbox folder and its subfolders (or a specific folder ID when using Custom Download Settings), as follows:
    - » *Inbox* – Only the Inbox folder will be polled. (Default.)
    - » *Inbox & Subfolders* – The Inbox folder and its subfolders will be polled.
    - » *Inbox Folder ID – (Custom Settings Only)*. Only the specified folder will be polled. The Inbox Folder ID option applies (and is shown) only when you are configuring Custom Download Settings for a specific user. (See [Add User and Customize Download Settings](#) on page 21.)



The folder IDs for users are assigned sequentially on the DataMotion Server. For example, if a user creates a folder named Images, it is assigned the next sequential folder ID on the DataMotion Server, such as 45994. You can find out the folder IDs assigned to users either programmatically or manually. To



discover folder IDs programmatically, use the Messaging API GetMailboxXML method (see the *DataMotion SecureMail Software Development Kit Technical Reference Manual* for details). To do it manually, log in to the DataMotion web portal, go to Member Center, and select Folders. On the Manage Folders page, point to the name of a user-defined folder, and the status bar will show the folder ID at the end of the URL, e.g., “?f=45994”. (Alternatively, you can click on the folder name to see the URL in the address bar.)

Standard Folder IDs include:

- » -1: Inbox and subfolders (same as the standard setting “Inbox & Subfolders”).
  - » 0: Inbox only (same as the standard setting “Inbox”).
  - » 1: Inbox only (same as 0 but retains the Inbox Folder ID).
  - » 2: Inbox Trash folder.
  - » 3: Outbox (Track Sent) folder.
  - » 4: Outbox Drafts folder.
  - » 5: Outbox (Track Sent) Trash folder.
  - » 6: Outbox (Track Sent) Archive folder.
  - » 7: Inbox Deleted Trash folder.
  - » 8: Outbox (Track Sent) Archive folder.
- **Download all messages or only those with attachments:** Filters what is to be downloaded, as follows:
    - » *All messages* – Download messages regardless of whether they contain attachments. (Default.)
    - » *Only with attachments* – Download only messages containing attachments.
  - **Purge message from SecureMail account after downloading:** Specifies whether to delete the message from the user’s account on the DataMotion Server after it has been downloaded to the client, as follows:
    - » *Yes* – Messages are permanently deleted from the Inbox after they are downloaded to the local host. The message is deleted completely. It is not moved to the user’s Trash folder or Deleted Trash folder, and it cannot be recovered after deletion.
    - » *No* – Messages are **not** deleted from the account after they are downloaded to the local host. (Default.)
  - **Client Message Cache:** Specifies whether to cache user messages on the local host, as follows:
    - » *Enabled – Download all messages* – When the cache is enabled, the DMA downloads all messages (both Read and Unread) that are not listed in the cache control file and then adds their IDs to file. Thus, messages are downloaded:



- A) Regardless of the message status on the DataMotion Server; that is, it downloads both Read and Unread messages (“Old” and “New” messages), and
- B) When the message ID is not already listed in the cache control file.

This option allows you to keep a cache on the local host of those messages that have been opened or Read (“Old” messages). The client download cache control file is named DownloadCache.txt, and it is stored under the Downloads folder in a folder named with the recipient’s User ID. (See *User ID* on page 21.) If the DownloadCache.txt file is renamed, moved, or removed, in effect it will clear the cache record, and at the next polling, all existing messages can be downloaded (depending upon the specific settings) and their message IDs will be listed in the new cache control file.

- » *Disabled – Only download New messages* – When the local message cache is disabled, only Unread messages (“New” messages) on the DataMotion Server will be downloaded. The cache control file is not used. (Default.)
- **Save Method:** Specifies and filters the file types and format used for saving downloaded messages, as follows:

**NOTE:** For additional information on file names, see *Downloaded Message File Names* on page 31.

**NOTE:** For all Save methods, Tracking of the sent message will report that both the message and all its attachments (if any) have been opened. For more information, see *Filtering, Downloading, Saving, Deleting, and Track Sent* on page 35.

- » *Save Entire Message as MIME-encoded .eml file* – (Default.) Saves message including attachments as a single file in standard SMTP format. The EML file format contains both the body and all file attachments. This format allows the message to be opened in email clients or to be parsed by third-party software packages. The filename will be <MID>.eml where <MID> represents the Message ID that is unique on the DataMotion Server. Example: 21274916.eml. (The MID is displayed in the DataMotion secure messaging web portal as one of the columns in the user’s Inbox.)

Note: If you save the message as an EML file and the General Settings **Download Path Type** is set to use a directory tree structure, DMA creates a Message ID folder containing an EML file also named with the Message ID.

- » *Save Body and Attachments as Separate Files (Body as .txt and/or .htm)* – Saves message body and attachments as separate files. The message body is saved as <MID>\_Body.txt and/or <MID>\_Body.htm (if HTML body exists), where <MID> represents the unique Message ID. (The MID is displayed in the DataMotion secure messaging web portal as one of the columns in the user’s Inbox.) The attachments are saved as decoded files using their original

filename and in their original format; that is, in the format they existed before they were sent. Example: 21274916\_Body.txt, 21274916\_Body.htm, Report.pdf.

- » **Save Only Body (as .txt and/or .htm)** – Saves only the message body as <MID>\_Body.txt and/or <MID>\_Body.htm (if HTML body exists), where <MID> represents the unique Message ID. The attachments are **not** saved. Example: 21274916\_Body.txt, 21274916\_Body.htm.
- » **Save Only Attachments** – Extracts and saves only the message attachments as decoded files using their original filename and in their original format. The message body is **not** saved. Tracking of the sent message will report that both the message and its attachments have been opened. If you use this Save Method, typically you would also select the filter **Only with Attachments** to avoid the possibly unwanted consequences of not saving messages that do not have attachments. Example: Report.pdf.
- » **Save Only Attachments Matching One or More File Patterns** – Extracts and saves only the message attachments as decoded files using their original filename and in their original format when the attachment filename matches a specified pattern. The message body is **not** saved. Tracking of the sent message will report that both the message and all its attachments have been opened. If you use this Save Method, typically you would also select the filter **Only with Attachments** to avoid the possibly unwanted consequences of not saving messages that do not have attachments.

Attachment File Patterns: Specifies a comma separated list of filename patterns to select attachments for saving. You can use the standard **wildcard** characters of an asterisk (\*) to match zero or more preceding or following characters, as well as the question mark (?) to match any single character in that position. Alphabetic characters are treated as case-insensitive. If you specify multiple patterns, you must separate them with commas. (You can also use a comma-space to separate them, because the space is ignored.) Examples: \*.txt, \*.xml, \*.tiff, \*form.pdf, Report\*.\*, July??2014.log, \*.doc\*

- **Post-Save Action**: Specifies the name and location of an application program or script to run after the message files have been saved, plus the optional %filename% argument, which is used to pass to the program the full path and filename for the file(s) that have been saved. The Post-Save Action executes the specified application program and passes the filenames to that program, so that their content can be integrated into a custom workflow by the program.
  - » Click the **Program/Script** button to browse for and select the program, or enter a fully qualified path and program name in the text box.
  - » Enter any parameters for your program in the **Arguments** text box. Use %filename% to pass a list of the saved files. If multiple files are saved for a message, then the filenames will be separated by commas (i.e., the string value will contain a Comma Separated Value list of fully qualified filenames with the entire string enclosed in quotes). For example, if a message is saved with separate files for body and attachments, and it contains an attachment named

Report.pdf, the string passed to the Post-Save program in the %filename% argument will be similar to the following:

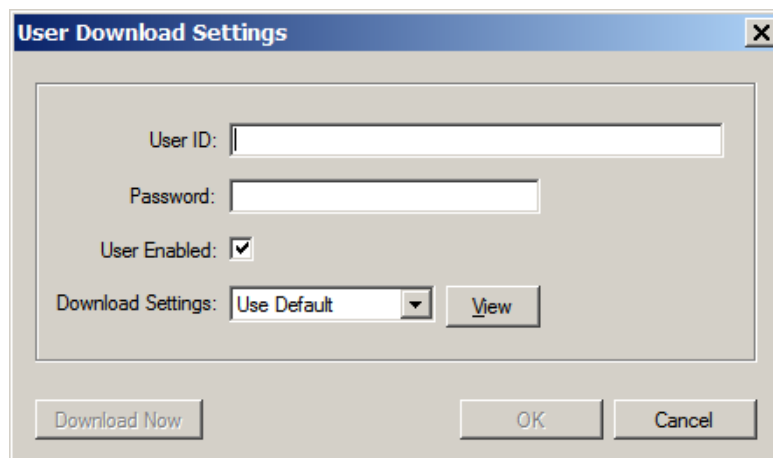
```
“C:\Program Files\DataMotion\DataMotion Adapter
Service\21274916_Body.txt,C:\Program Files\DataMotion\DataMotion
Adapter Service\Report.pdf”
```

**NOTE: For more details on how filtering works, especially in relation to how the filters are applied to select messages for action (downloading, purging, saving), as well as how the actions affect the message status on the DataMotion Server, see [Filtering, Downloading, Saving, Deleting, and Track Sent](#) on page 35.**

### Add User and Customize Download Settings

At least one user must be configured to use the DMA Service.

1. On the [User Settings](#) tab, click the **Add User** button to add a user. The program opens the User Download Settings dialog.



2. Fill in the applicable fields according to the information that follows:
  - **User ID:** (Required.) Specifies the DataMotion User ID or Email Address for the user account that is to be polled by the DMA Service. This value is used to identify and authenticate the account on the DataMotion Server so messages can be downloaded.

This value will also be used as a folder name in the download directory structure on the local host when:

- A) [General Settings](#) specify a **Download Path Type** = “Save downloads to directory tree” or
- B) [User Settings](#) specify Download Setting of **Client Message Cache** = Enabled.

While it is unusual, email addresses may include symbols and characters such as

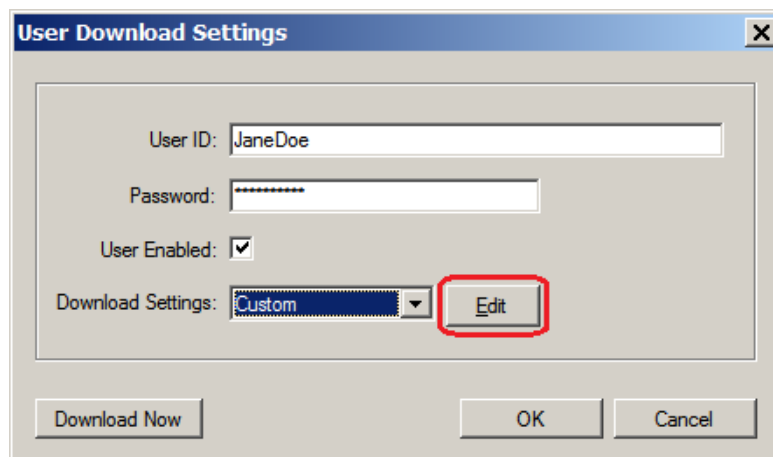
\ / : \* ? " < > |. The Windows operating system does not allow these characters to be used in file/folder names. If the user's email address contains any non-standard file system characters for the client's OS, the OS will not be able to create the folder and will generate an error. To avoid this issue, you can assign the user a friendly User ID that does not contain any of these non-standard characters, and specify this User ID instead of the email address. (An administrator can assign the User ID through Member Center> Administrative Tools> Manage Users> Update User.)

**NOTE: The User ID specified here is stored in *UserList.xml* (User List Configuration File) on page 33.**

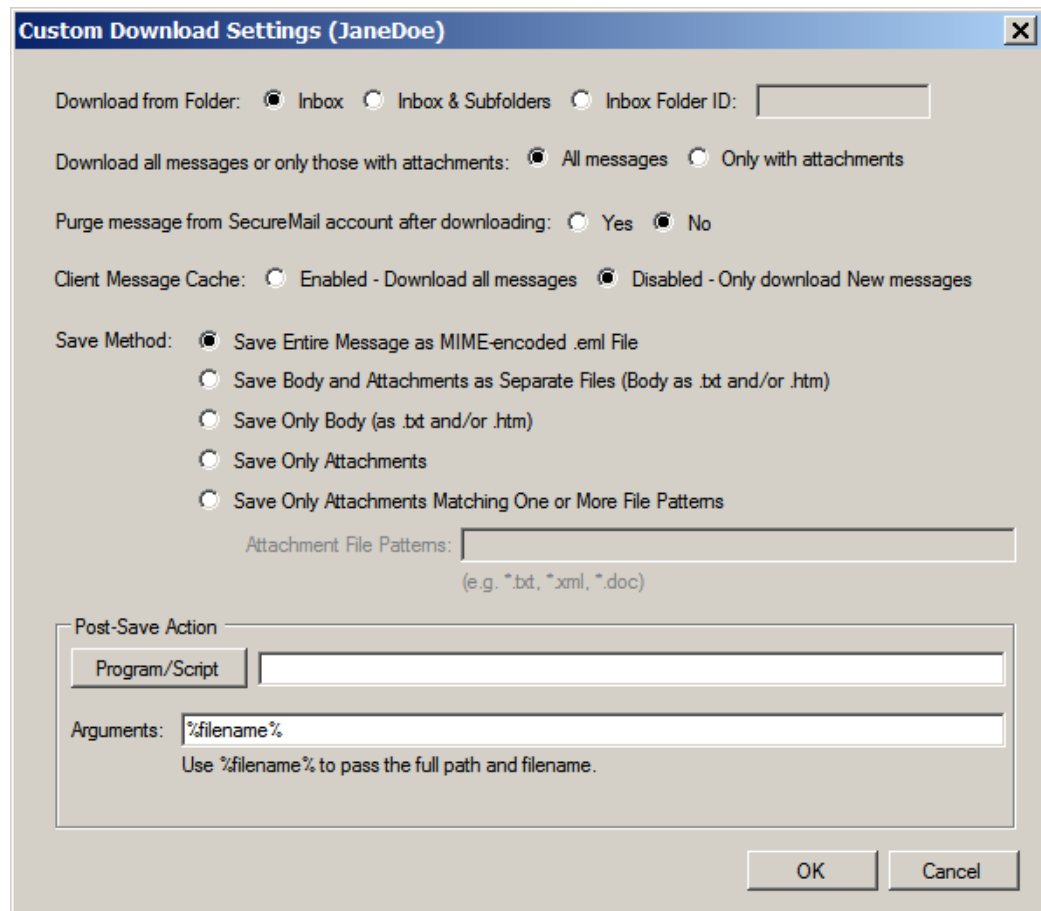
- **Password:** (Required.) Specifies the password associated with the DataMotion user account. The password is case-sensitive and will be used to authorize the download of the user's messages by the DMA Service.

**NOTE: To protect the user account against unauthorized access, the Password specified here is stored as an encrypted token in *UserList.xml* (User List Configuration File) on page 33.**

- **User Enabled:** Click the checkbox to enable or disable this user in the DMA Service. When enabled, the user account will be polled by the service.
- **Download Settings:** Click on the drop-down list and select either Default or Custom **Download Settings** for the user, as follows:
  - » **Use Default** – Selects the Default Download Settings that apply to all users. Click the **View** button to view the default settings. (Note: The default settings can be modified through the **Default Download Settings** button on the *User Settings* tab.)
  - » **Custom** – Selects Custom Download Settings that override the default settings. When you select Custom, the View button changes to an Edit button. Click the **Edit** button to specify Custom Download Settings for this user account.



- When you click the **Edit** button, the Custom Download Settings dialog is displayed, similar to the following, which allows you to specify settings for this user.



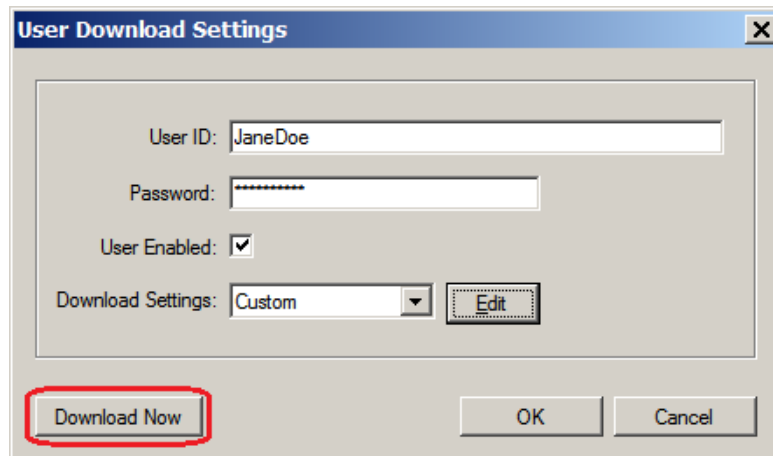
- Set the fields to the desired values for this user. This will override the default settings for this user. The fields have the same meaning as those in the Default Download Settings. For a description of the fields, refer to [Default Download Settings](#) on page 16.

**NOTE: The option to Download from Folder using a Folder ID applies (and is shown) only when you are configuring Custom Download Settings for a specific user (see the screen above). It does not apply to, and is not shown in, the Default Download Settings.**

- After selecting the Custom Download Settings for this user, click **OK** to return to the User Download Settings dialog. From there, you can perform a **Download Now** to try the settings if you want (see the [Download Now button](#) on page 24). (Afterwards, make sure to click **OK** to finish adding the user.)

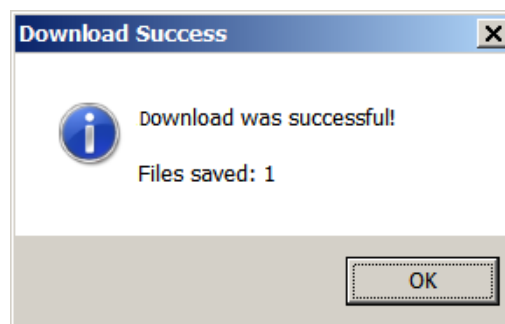
## Download Now button

You can perform a single Download from the User Download Settings dialog. (This dialog is accessed from the *User Settings* tab when you Add User or Edit User.)



**NOTE:** If you want to perform a clean download on the local host, you may want to clear out the Downloads folder before running the download, but make sure not to delete any saved messages that you want to keep!

1. When you click the **Download Now** button, the DMA Utility performs an *actual download* for this user only and regardless of whether the DMA Service is running. Rather than using the last saved settings, the download will be based on the current User Download Settings (including whether to Purge or Delete the messages) and the current *General Settings*. This allows you to make changes to the settings and try them before saving the settings.
2. After you click the **Download Now** button, the utility reports the results.
  - » For a successful download, a message similar to the following is displayed:



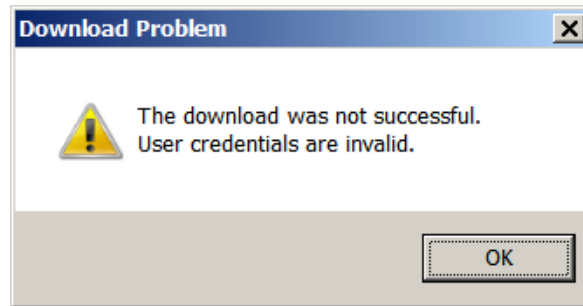
If the utility is able to access the user account, it reports a successful download. If the utility saves any files, it reports the number of files saved.

Messages will be downloaded and saved depending on the settings in the



DMA configuration; that is, the download will depend on settings like Download All Messages or Download Only New Messages. You can verify what was saved by checking for the file(s) in the Downloads folder.

- » If the utility cannot access the user account, it reports the problem with a message similar to the following:

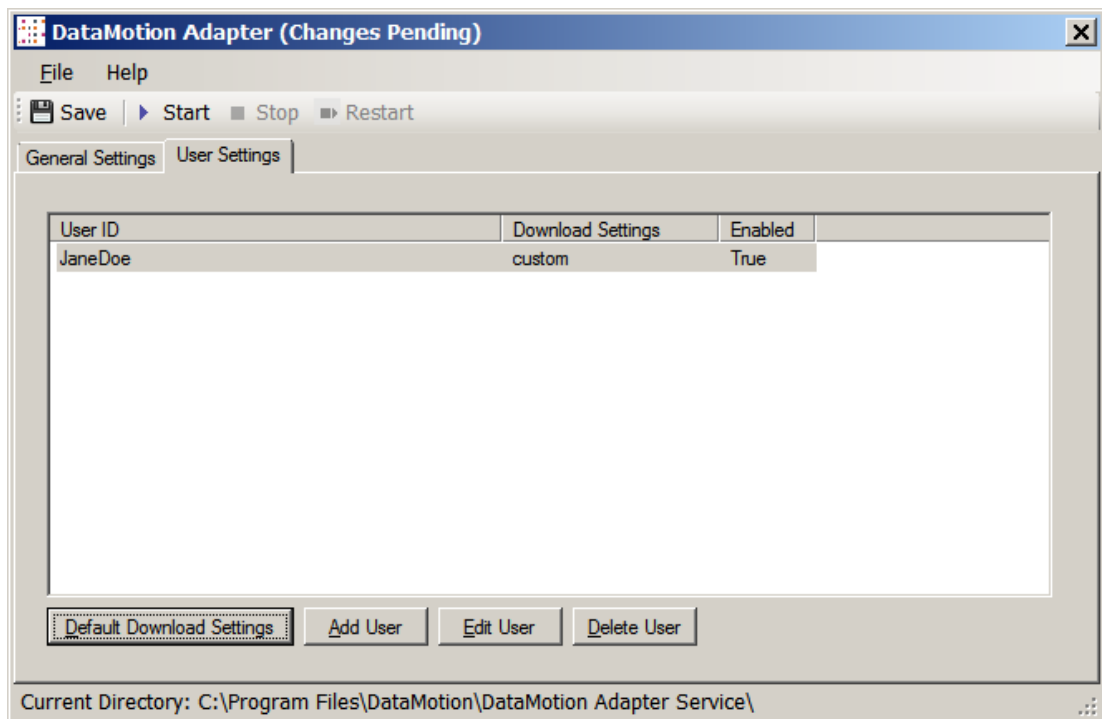


If you receive an error, first check the settings, and if you can't resolve it, see [Troubleshooting](#) on page 29.

### Finish Adding the User and Save the Configuration

When you are done with the user configuration (whether you tried the **Download Now** button or not), finish adding the user as follows:

1. Click **OK** to finish adding the user. This will exit the User Download Settings dialog and return to the main DMA screen, similar to the following:



2. Save your configuration by clicking the **Save** button on the toolbar:  **Save**.

This completes the instructions on adding a user.

If you have completed the User Settings, you can Start the DMA Service according to the instructions in [Operating the DataMotion Adapter Service](#) on page 28.

## Edit User

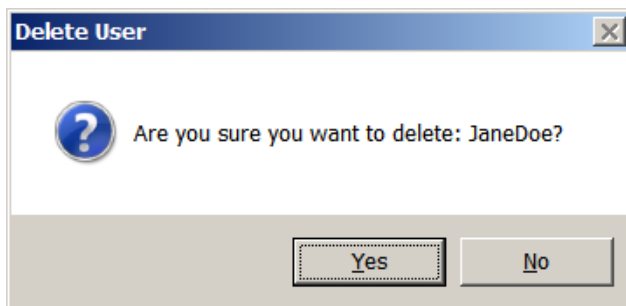
To edit a user, from the [User Settings](#) tab, click on the user in the User List, and click the **Edit User** button. (Alternatively, you can double-click on a user displayed in the User List.) This opens the User Download Settings dialog.

The settings are the same for editing as when adding a user. For a description of these settings, refer to [Add User and Customize Download Settings](#) on page 21.

## Delete User

It is not necessary to delete a user if you only want to remove the user from the DMA Service. To leave the user's settings in the configuration while suspending the user from the DMA Service, you can disable the user. You may do this by editing the user and clicking on the **User Enabled** checkbox to remove the check mark. (See [Add User and Customize Download Settings](#) on page 21 for more information.)

To delete a user, from the [User Settings](#) tab, click on the user in the User List, and click the **Delete User** button. A confirmation is displayed, similar to the following:



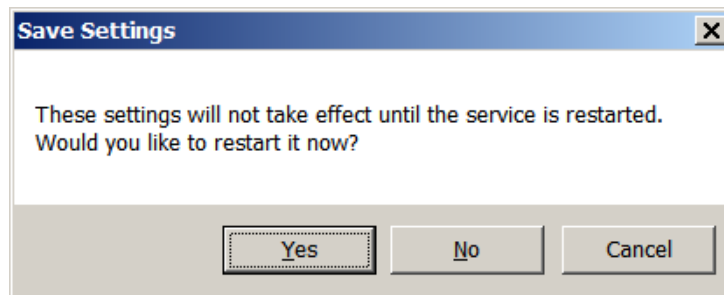
Click Yes to delete the user or No to cancel.



## SAVE SETTINGS

After making changes to *General Settings* or *User Settings*, make sure to save your configuration. To save your configuration, click the **Save** button on the toolbar:  **Save**. Or you can:

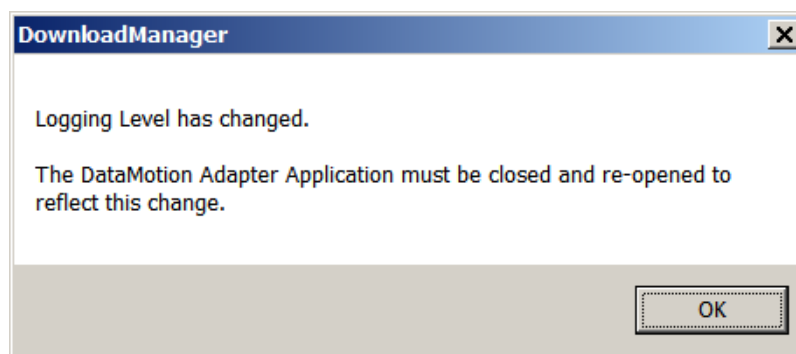
1. Click the **File** menu.
2. Click **Save Settings**.
  - A. If the DMA Service is running, you are asked whether you want to restart the service after saving the settings:



- » **Yes:** Saves the settings and restarts the DMA Service with the new settings.
- » **No:** Saves the settings but does not restart the DMA Service. The DMA will not use the new settings until it is restarted.
- » **Cancel:** Cancels and returns to the utility without saving or restarting.

Click on the desired option.

- B. If you changed the logging level in *General Settings*, you are notified that the logging level will not take effect for the UI.log until the DMA Utility is closed and re-opened.

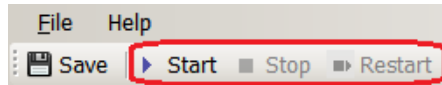


- » Click OK to continue.

If you have completed the User Settings, you can Start the DMA Service according to the instructions in *Operating the DataMotion Adapter Service* on page 28.

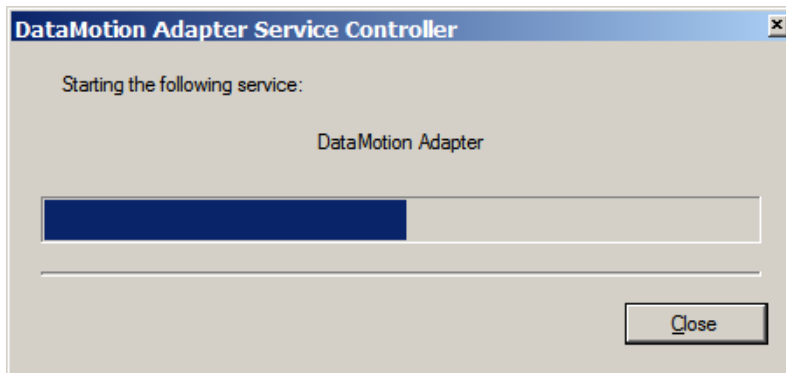
## OPERATING THE DATAMOTION ADAPTER SERVICE

The DataMotion Adapter is a native Windows Service. The DMA Utility program allows you to **Start**, **Stop**, and **Restart** the service. To do this, click the appropriate button on the program toolbar (located at the top left of the utility window).



Refer to the following for information about operating the service:

- **Restart** is equivalent to a **Stop** followed by a **Start**.
- When you start the DMA Service, it displays a progress message similar to the following:



- When you start the DMA Service, it creates a new log file with the filename based on the date when the service was started.

**NOTE: DMA Service Logging only occurs when the service is running. For more information, see [Logging Level under General Settings on page 12](#).**

- When the service is running, it polls the user accounts for messages to download, according to the configured settings.
- The DataMotion Adapter Service can also be managed using the Windows Service Control Manager (Control Panel > Administrative Tools). Within the Services window, you can Stop, Start, Pause, Resume and Restart the DataMotion Adapter Service. This is done by highlighting the DataMotion Adapter service in the list and clicking the appropriate button on the toolbar.

**NOTE: The name of the DMA process in the Windows Task Manager is `svcAdapter.exe`.**

## TROUBLESHOOTING

Refer to the following information for troubleshooting:

- To help diagnose an issue, you can review the log files. See [Log Files](#) on page 32.
- To diagnose an issue in depth, change the [General Settings](#) on page 12 **Logging Level** to **Verbose Logging – Test Mode**. This puts the DMA Service in Test logging mode, and should only be done when the system is being closely monitored, because the SVC.log file will grow rapidly. While in Test Mode, every action is logged in detail to provide help in diagnosing problems with the system and the DMA configuration.
- To perform a single Download for a user account, see [Download Now button](#) on page 24.
- To check for proper communication between the host computer and the DataMotion Server, use the Test button under [General Settings](#) on page 12.

To securely retrieve messages, the DMA uses an SSL connection to the DataMotion Server Web Service. For this reason, the host computer where the DMA Service is installed must have access to the DataMotion Web Service via an SSL connection on Port 443. The URL for the Web Service is specified in the [General Settings](#) on page 12. If the DMA Service is running and this connection is severed, it will write an error to the service log file.

- To download messages from a user account, the **Web Services API Integration** feature must be enabled for the account. (See [Operating Requirements](#) on page 11). If this feature is not enabled for the user account, downloading messages from the account will be unsuccessful and an error will be logged (e.g., “**ERROR: Server was unable to process request. ---> User is not authorized to use the Web Service API.**”). Enablement must be done by a multi-company admin (“superadmin”) or a DataMotion admin (Integrator). It cannot be done by a company admin. To inquire about enabling this feature, contact your support representative.
- If a download is not successful and the log file shows “**ERROR: 13 The given path’s format is not supported**” (or a similar message is displayed in a message box when using Download Now), it could be caused by the use of a non-standard file system character in a recipient’s or sender’s email address (or the User ID). Windows does not allow file or folder names to contain symbols and characters such as \ / : \* ? " < > |. If downloading to a Directory Tree ([General Settings Download Path Type](#) = “Save downloads to directory tree”), DMA will attempt to use the **recipient’s and sender’s** email address to create a folder name, and if either contain a non-standard file system character, it will cause this error. If downloading using a Client Message Cache (when [User Settings](#) specify a Download Setting of **Client Message Cache** = Enabled), DMA will attempt to use the **recipient’s** email address to create a folder name, and if it contains a non-standard file system character, it will cause this error.
  - » To avoid this issue with the **recipient’s** email address, you can assign the user a “friendly” User ID that does not contain any of these non-standard characters, and specify this [User ID](#) instead of the email address. (An administrator can assign the User ID through Member Center> Administrative Tools> Manage Users> Update

User.) For more information on the Recipient-User-ID and non-standard file system characters, see [User ID](#) on page 21.

- » To avoid this issue with the **sender's** email address, set the download path to **Save downloads to one directory**.
- If a download appears to be successful but the files were not saved as expected, check the user's [Default Download Settings](#) and Custom Download Settings, and refer to the section on [Filtering, Downloading, Saving, Deleting, and Track Sent](#) on page 35.

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## 4

# DataMotion Adapter Files

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The following information identifies some pertinent DataMotion Adapter (DMA) files.

- **General Files** (below)
- **Downloaded Message File Names** (below)
- **Log Files** (on page 32)
- **Configuration Files** (on page 33)

### GENERAL FILES

These files are located in the DMA installation folder.

- **DownloadManager.exe:** The DMA Utility program, which is used to configure and run the DMA Service, among other things. See [Configuring the DataMotion Adapter](#) on page 12.
- **DownloadCache.txt:** The client download cache control file containing Message IDs of messages that have been downloaded. This file is stored on the local host under the Downloads folder in a folder named with the recipient's User ID. See [Add User and Customize Download Settings](#) on page 21.
- **svcAdapter.exe:** The DMA Service program which is run by the DMA Utility. See [Operating the DataMotion Adapter Service](#) on page 28.

### DOWNLOADED MESSAGE FILE NAMES

The location for saving downloaded message files is specified in the [General Settings](#) on page 12.

Files are saved in the folder specified by the **Download Path** parameter. The default location for saved files is the Downloads folder under the DMA installation folder. Also, depending upon the setting of the **Download Path Type** parameter, the files are saved directly in the download path folder or in a subordinate folder structure under the download path folder.

The DMA automatically creates filenames for all saved files as needed. The names for the saved files are determined by the **Save Method** (see [User Settings](#) on page 16 for details). In general, the filenames will be as follows:

- If the entire message is saved as a MIME-encoded EML file, the filename will be <MID>.eml, where <MID> is the unique Message ID identifying the message on the DataMotion Server. Example: 21274916.eml. (The EML file format contains both the message body and all file attachments.)
- If the message body and attachments are saved as separate files, or only the message body is saved, the message body is saved as <MID>\_Body.txt and/or <MID>\_Body.htm (if HTML body exists), where <MID> represents the unique Message ID on the DataMotion Server. Example: 21274916\_Body.txt.
- If attachments are saved separately from the body, they will be saved as decoded files using their original filename and in their original format.

## FILES USING THE SAME NAME

If the Downloads folder or subfolder contains any existing files that have the same name as a file being saved, the DMA handles it as follows. (This situation is more likely to occur when the [General Settings](#) **Download Path Type** is set to use *Save downloads to one directory*.)

- If it is an EML file (where the filename is the MID), DMA will overwrite the existing file. MIDs are unique on the DataMotion Server, so it knows this is an identical message.
- If it is a Body.txt or Body.htm file, DMA will save the file by appending “[1].txt” or “[1].htm” to the filename, and it will increment the number for each additional one. For example, if the message body for same message is downloaded and saved three times to the same folder, the folder will contain: “21274916\_Body.txt”, “21274916\_Body.txt [1].txt”, “21274916\_Body.txt [2].txt”.
- If it is an attachment file, DMA will save the file by appending “[1].EXTENSION” to the filename (where EXTENSION represents the attachment filename extension), and it will increment the number for each additional one. This is because there may be different content in the attachments, even though they have the same name. For example, if an attachment with the same name is saved three times and the attachment is named Report.pdf, the folder will contain: “Report.pdf”, “Report.pdf [1].pdf”, “Report.pdf [2].pdf”.

## LOG FILES

Log files are located in the folder specified by the **Log File Path** parameter, which is one of the [General Settings](#) on page 12. The default location for log files is the Logs folder under the DMA installation folder.

The DMA automatically generates a filename for each new log file. The filename is determined by the date when the log file is created. The following types of log files are used, where <date> represents the numeric creation date in month-day-year format (e.g., 09-30-2013):

- **<date>\_SVC.log:** The DMA Service log file, which contains logging information for the DMA Service. A new log file is created each time the DMA Service is started or restarted. Logging only occurs in this file while the DMA Service is running.
- **<date>\_UI.log:** The DMA User Interface log file, which contains logging information for the [Download Now button](#) on page 24. A new log file is created each time the Download Now button is used.

When multiple log files are created on the same date, DMA will save the files by appending “[1].log” to the filename, and it will increment the number for each additional one; for example: “09-30-2013\_SVC.log”, “09-30-2013\_SVC[1].log”, “09-30-2013\_SVC[2].log”.

## CONFIGURATION FILES

The DMA Utility program allows you to configure the operation of the DMA Service. The DMA settings are saved in configuration files, which are used to control the operation of the service on the host. When the DMA Service is started or restarted, it reads the DMA configuration files.

The General Configuration File and User List Configuration File are located in the DMA installation folder. It is not necessary to edit these files directly, because the utility program does this for you. However, these files are in XML format and can be parsed and edited by an application program, or they could be edited manually using Notepad.exe or any popular XML editor application.

**IMPORTANT: It is not necessary to edit these files directly, because the utility program does this for you. However, if you do edit the files, it is critical to retain their XML structure to ensure the settings can be loaded for proper operation of the DMA.**

### SVCADAPTER.EXE.CONFIG (GENERAL CONFIGURATION FILE)

The General Configuration File is named svcAdapter.exe.config, and it contains global settings for the DMA. It must be located in the installation folder.

The General Configuration File contains a parameter called UserListXMLFile, which specifies the complete path and filename for the User List Configuration File. (This parameter is not exposed in the DMA Utility.) This parameter must contain a filename, while the path name is optional. If no path information is present, the installation folder is used by default.

### USERLIST.XML (USER LIST CONFIGURATION FILE)

The User List Configuration File is named UserList.xml, and it contains user-specific settings and DataMotion account credentials for every account that you want polled by the DMA Service.

**NOTE: The User List file contains DataMotion account credentials (User IDs and Passwords). Although the passwords in this file are stored as encrypted tokens to protect the user accounts against unauthorized access, you may want to add appropriate security, such as Windows file system security.**



The User List File is located in the installation folder by default. (Its name and location is determined by the “UserListXMLFile” field in the General Configuration File.) The file name and location are not exposed in the DMA Utility (user interface).



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## Appendix A: Supplemental Information

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The following information describes supplemental information for the DataMotion Adapter (DMA). The topics include:

- *Filtering, Downloading, Saving, Deleting, and Track Sent* (below).
  - » *Filtering and Action Sequence* (on page 36).
  - » *Considerations* (on page 37).
  - » *Example 1: All, New, Purge, Only Attachments* (on page 38).
  - » *Example 2: All, New, Purge, Only Attachments File Pattern (No Match)* (on page 39).
  - » *Download Settings Flexibility* (on page 41).

### FILTERING, DOWNLOADING, SAVING, DELETING, AND TRACK SENT

You control message downloading, saving, and deleting through filters and parameters specified in the User *Default Download Settings* or Custom Download Settings (as described in *User Settings* on page 16).

With most Download Settings that are used by customers, messages are downloaded from the DataMotion Server and saved on the local host. More complicated filter settings, however, provide additional control for downloading, saving, and deleting. The following information explains how this works in more detail, especially in relation to how the filters are applied to select messages for action as well as how the actions affect the message status on the DataMotion Server.

The Download Settings specify filters for downloading messages and saving them on the local host, and optionally for purging them from the DataMotion Server. These actions also affect the Tracking of Sent messages, because they mark the messages and their attachments as opened in Track Sent.

## FILTERING AND ACTION SEQUENCE

The Download Settings are applied in the following sequence of filtering and actions:

### 1. DMA Performs Pre-Download Filtering (on the DataMotion Server)

Pre-Download Filtering selects the messages to download. These filters take effect **before** downloading the messages and include the following settings:

- A. Download from Folder (Inbox, Inbox & Subfolders, Folder ID)
- B. Download all messages or only those with attachments
- C. Client Message Cache (Enabled – Download all messages; Disabled – Only download New messages)

### 2. DMA Downloads the Selected Messages

- A. The messages are downloaded to the client (but not yet saved as files in the Downloads folder).
- B. The messages are marked as opened on the DataMotion Server. This also triggers Track Sent Notification messages to the senders.

### 3. DMA Deletes the Selected Messages (if Purge is selected)

When the **Purge** option is selected, the messages and attachments are permanently and completely deleted from the user's secure messaging account on the DataMotion Server. The messages are not moved to the user's Trash folder or Deleted Trash folder, and they cannot be recovered after deletion.

### 4. DMA Performs Post-Download Filtering (on the Client)

Post-Download Filtering takes effect **after** downloading the messages to the local host. It selects the files that are saved, as well as their format. This filtering is specified in the **Save Method** settings, which include:

- A. Save Entire Message as MIME-encoded .eml file
- B. Save Body and Attachments as Separate Files
- C. Save Only Body
- D. Save Only Attachments
- E. Save Only Attachments Matching One or More File Patterns

The first two Save Methods (A & B) always save the message body and any attachments. The second (C) saves only the body and no attachments. The next two (D & E) save only attachments and not the body. The last one (E) filters the attachments to save.

### 5. DMA Saves the Files (on the Client)

## CONSIDERATIONS

The following considerations are worth noting about this sequence of applying the filters and executing the actions:

- Downloading messages from the DataMotion Server is not exactly the same thing as Saving the messages/attachments as files on the local host. Downloaded messages may not be saved on the local host, depending on the **Save Method** settings.
- Messages are opened for downloading before any Post-Download Filters are applied. Any New messages that are opened and downloaded will trigger Track Sent notifications. (So if messages are downloaded but not saved, they will still have been opened and will trigger Track Sent notifications.)
- **Pre-Download Filters** are applied before messages are downloaded. One implication of this is that messages that are **excluded** by these filters will **not** be downloaded and marked as opened, and so they will not trigger Track Sent Notification messages.
  - » If you select **Inbox** only, any messages in Inbox **subfolders** will be **excluded** from being opened, downloaded, purged, or saved to file. This includes any new messages in the subfolders.
  - » If you select a specific **Folder ID**, all messages will be excluded except for those in the specified folder.
  - » If you select **Only with attachments**, any messages that do not have attachments will be **excluded** from being opened, downloaded, purged, or saved to file. This includes any new messages that do not have attachments.
  - » If you select **Client Message Cache Disabled (Only download New messages)**, any previously opened messages will be **excluded** from being opened, downloaded, purged, or saved to file.
  - » If you select **Client Message Cache Enabled (Download all messages not in the cache list)**, any messages existing in the cache list will be **excluded** from being opened, downloaded, purged, or saved to file.
- If **Purge** is chosen, messages selected by the **Pre-Download Filters** are **permanently** deleted from the server after they are downloaded but before they are saved on the client through the Post-Download Filters (**Save Method**). If the Save Method does not select the downloaded messages for saving onto the local host, the messages do not exist on the client and cannot be recovered or restored on the DataMotion Server.
- **Post-Download Filters** (the **Save Method**) select which downloaded messages are saved as files on the local host. (Depending on the Save Method, these filters may not select any of the downloaded messages to save.)
  - » If you select **Save Only Body**, any attachments are not saved.
  - » If you select **Save Only Attachments**, the message body is not saved, **and** any messages downloaded that do not have attachments will not be saved.

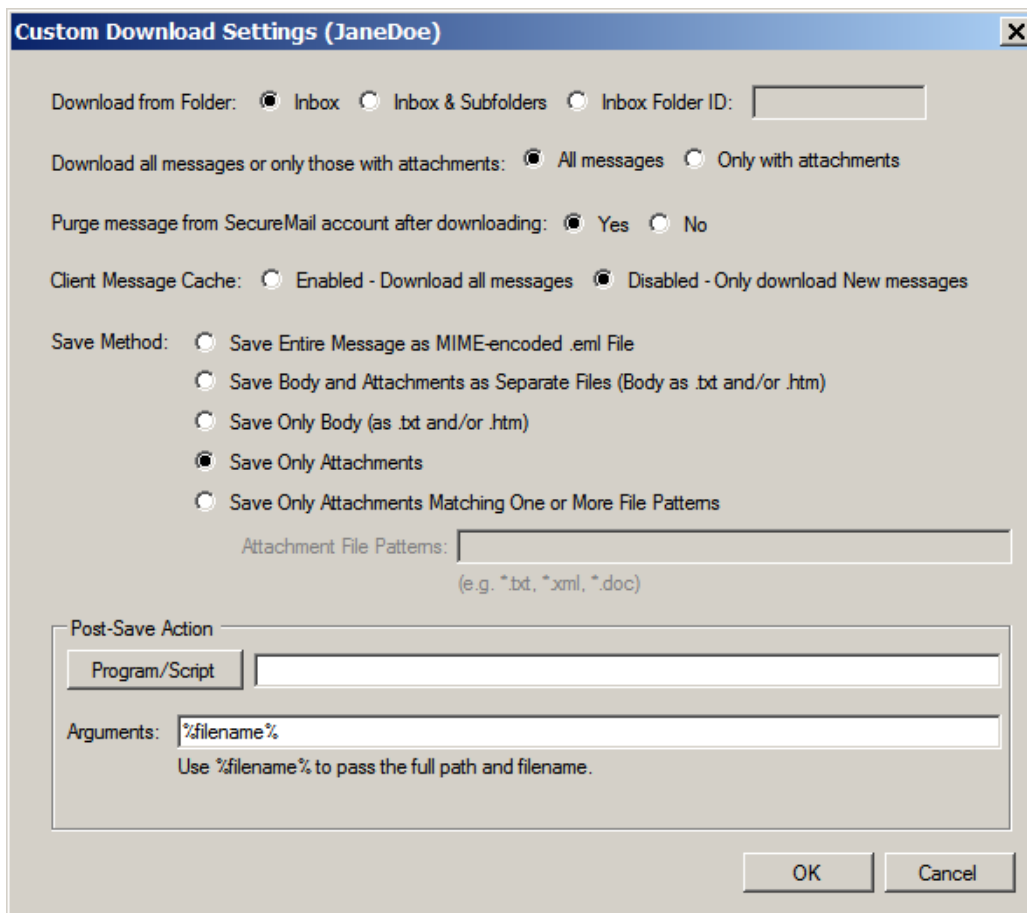
- » If you select *Save Only Attachments Matching One or More File Patterns*, the message body is not saved, **and** any messages downloaded that do not have attachments will not be saved, as well as any messages downloaded that do not have attachments matching the filename patterns you specify.

**EXAMPLE 1: ALL, NEW, PURGE, ONLY ATTACHMENTS**

Assuming the Inbox contains one New message with an attachment named **Report.pdf** and one New message without attachments, and the following Download Settings are used:

- Download from Folder: Inbox.
- Download **All messages**.
- Purge**: Yes.
- Cache: Disabled (**Only New Messages**).
- Save Method: **Save Only Attachments**.

Note that the Save Method of Only Attachments only saves the attachment and not the message body.



When this download occurs:

- Both New messages are selected for downloading (through the Pre-Download Filters: **Inbox**, **All Messages**, and **New Messages**).
- Both New messages are opened and downloaded, triggering a Track Sent notification to the sender of each one.
- Both New messages are deleted permanently from the DataMotion Server (**Purge**).
- The **Report.pdf** attachment from the first message is saved as a file on the local host. The body of the message is **not** saved. The second message also is **not** saved because it does not contain an attachment.

The result is that both messages are opened, triggering Track Sent notifications, and both messages are deleted permanently from the DataMotion Server, but only the attachment from one message is saved on the local host. The message bodies of both messages are not saved and are not recoverable.

If the Client Message Cache were enabled, the result would be the same, because the Message IDs for the New messages would not be in the cache control file list (DownloadCache.txt).

These Download Settings are very unusual, but they help to show how the filters function. In most cases, if you use a Post-Download Filter (Save Method) of *Save Only Attachments*, you would also use a Pre-Download Filter of *Only with Attachments* to avoid the possibly unwanted consequences of selecting messages that do not have attachments but not saving them.

## EXAMPLE 2: ALL, NEW, PURGE, ONLY ATTACHMENTS FILE PATTERN (NO MATCH)

This example is the same as Example 1, except for using a File Pattern, with important differences **highlighted in yellow**.

Assuming the Inbox contains one New message with an attachment named **Report.pdf** and one New message without attachments, and the following Download Settings are used:

Download from Folder: Inbox.

Download **All messages**.

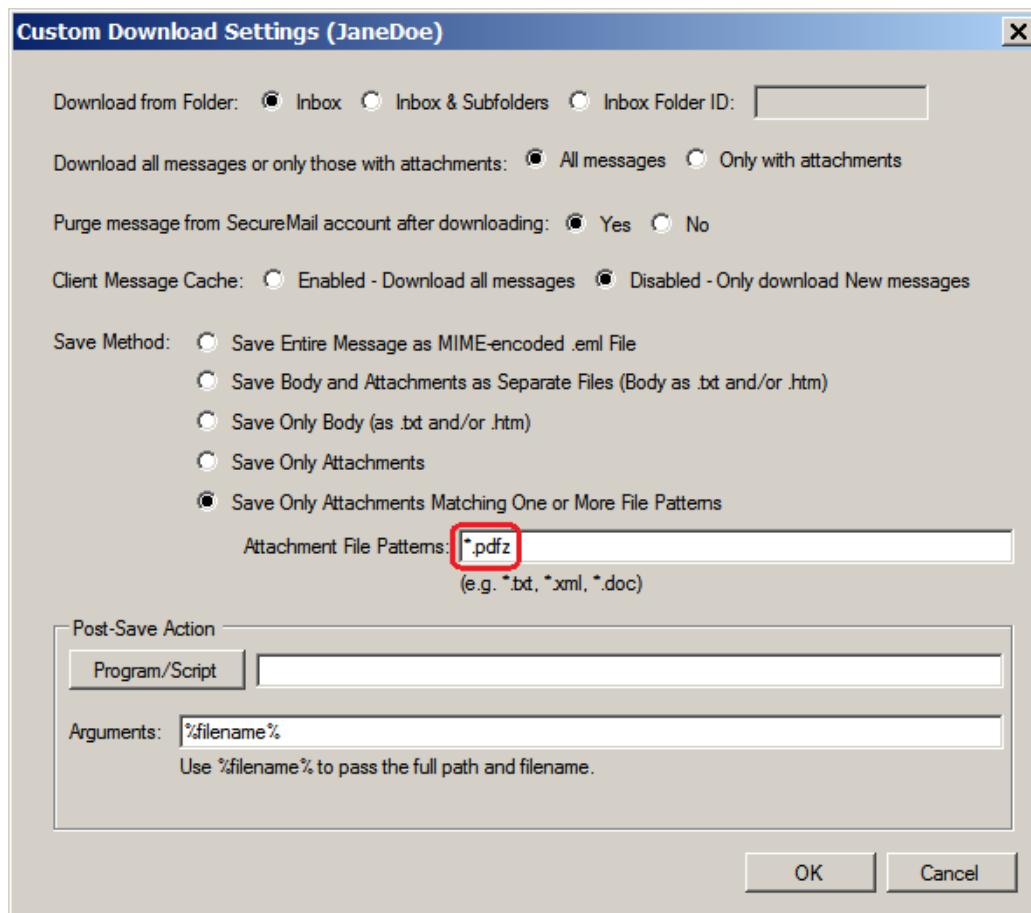
**Purge**: Yes.

Cache: Disabled (**Only New Messages**).

**Save Method: Save Only Attachments Matching One or More File Patterns: \*.pdfz.**

Note that the Save Method of File Pattern only saves the attachment and not the message body. However, in this example, **the File Pattern contains a typographical error (\*.pdfz), and so the attachment filename will not match the pattern and the attachment will not be saved.**

**NOTE: This example points out the importance of making sure your filename pattern is correct and will match the attachment filenames that you want downloaded.**



When this download occurs:

- Both New messages are selected for downloading (through the Pre-Download Filters: **Inbox, All Messages, and New Messages**).
- Both New messages are opened and downloaded, triggering a Track Sent notification to the sender of each one.
- Both New messages are deleted permanently from the DataMotion Server (**Purge**).
- **No messages or attachments are saved on the local host. The Report.pdf attachment is not saved because the File Pattern does not match. The body of the message is not saved. The second message, which does not contain an attachment also is not saved because it does not match the pattern.**

The result is that both messages are opened, triggering Track Sent notifications, and both messages are deleted permanently from the DataMotion Server, and **nothing is saved on the local host. Both messages, including the attachment in the first message, are not saved and are not recoverable.**

If the Client Message Cache were enabled, the result would be the same, because the Message IDs for the New messages would not be in the cache control file list (DownloadCache.txt).

These Download Settings are very unusual, but they help to show how the filters function. In most cases, if you use a Post-Download Filter (Save Method) of *Save Only Attachments*, you would also use a Pre-Download Filter of *Only with Attachments* to avoid the possibly unwanted consequences of selecting messages that do not have attachments but not saving them.

## DOWNLOAD SETTINGS FLEXIBILITY

The breadth and flexibility of the Download Settings allow you to accomplish a great variety of downloads to fit your purposes.

For example, you may use the DMA to retrieve DataMotion Secure eForms as PDF attachments in messages where the message body is empty. In this case, you would use the filters for Only Attachments and Save Only Attachments.

The Download Settings also allow you to delete all messages from a folder. You can do this as follows:

- Clear the local client message cache list by deleting or moving the DownloadCache.txt file or the entire Downloads folder.
- Select Filters: All Messages, Client Message Cache Enabled, Purge.
- If you do not want to save the downloaded messages and attachments as files on the local host, select Save Only Attachments Matching One or More File Patterns and enter a filename pattern that won't be matched, such as "\*.NoMatch."

\* \* \*

This represents the end of the *DataMotion Adapter Guide for SecureMail*.