

# **EMail Notification Quick Start Guide**

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# **E-Mail Notification Quick Start Guide**

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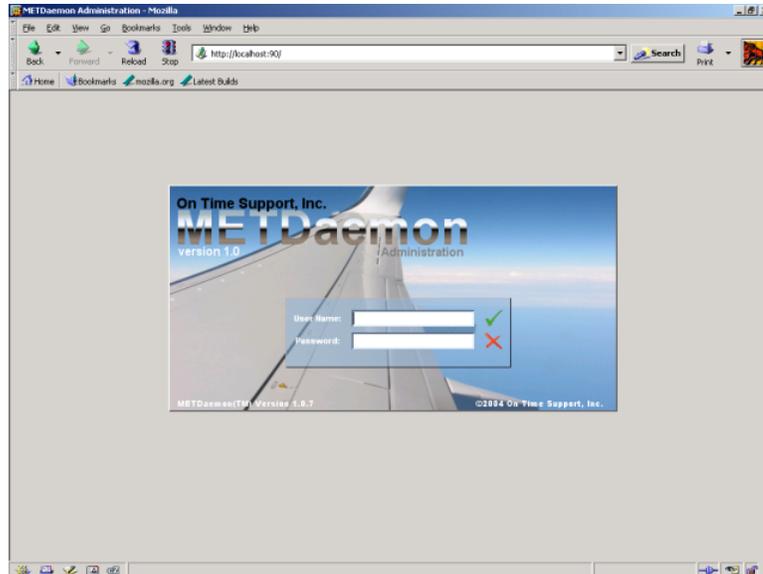
# Table of Contents

Introduction .....	v
1. Basic Administration .....	1
Starting/Stopping the Application .....	1
Adding an Email Recipient .....	1
Adding an Email Recipient Group .....	2
Adding a Scheduled Task .....	3
Checking for Task Execution Warnings/Errors .....	4

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# Introduction

Email Notification is an add-on package for METDaemon and is administered through the METDaemon Administration web-based interface.



If you do not yet know how to log in to the METDaemon Administration web-based interface, please refer to METDaemon Documentation.

Before starting this tutorial:

Email Notification relies on features provided by METDaemon. Please be sure METDaemon is configured correctly with all the required information for sending an automated email report. This includes:

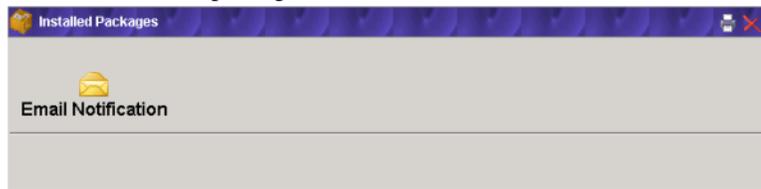
- Network Configuration
- Datasources
- SQL Reports
- Report Formats
- All Required Licenses

Please refer to METDaemon Documentation to configure the previous options correctly.

To administer Email Notification, you must first open a browser and log in to METDaemon Administration.



This will show a list of all installed packages.



Select the "Email Notification"  button. You will now see a page consisting of all available actions for Email Notification.

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# Chapter 1. Basic Administration

## Starting/Stopping the Application

To activate Email Notification, a valid EMN license must be installed.

To install an Email Notification license, please refer to the "Installing Licenses" section of METDaemon Documentation.

Select the "Start/Stop"  button to access the Start/Stop options.

The first item, "Current Email Notification Status:" indicates whether or not the Email Notification service is currently active.

The next item, "Turn Email Notification:" has 2 options: "On" or "Off". To turn the service on, select the "On"  button. Or select the "Off"  button to turn the service off.

To return to the Email Notification options menu, close the "Start/Stop" form by either selecting the "Close"  button at the top right of the form, OR select the "Back to EMN Menu"  button at the

top right of the form.

## Adding an Email Recipient

Select the "Add Email Recipient"  button on the Email Notification options menu. The "Add Recipient to Distribution List" form will be displayed.



"First Name" is a required field.

"Last Name" is a required field.

"Email Address" is a required field. The email address entered here can be of almost any valid email address format such as "*username@domain.com*", or "*lastname.firstname@server.domain.com*", or "*FirstName LastName <username@domain.com>*".

Groups are optional. "Available Groups" will show a list of groups(if any exist) that this new recipient can be added to. Double-click the group name to transfer the group to the "Selected Groups" list. OR, you may select the group(single-click) and then select the "Move Selected Item Right"  button to

transfer the group to the "Selected Groups" list. If this recipient is to be apart of ALL available groups, select the "Move All Items Right"  button.

After all required fields are completed and all groups have been selected, select the "Save"  button in the top right of the form. When saving the new recipient is successful, you will get a confirmation stating "Recipient Successfully Added to System" and the form will reset(clear) and is now ready to add another recipient, if desired.

To return to the Email Notification options menu, close the "Add Recipient to Distribution List" form by either selecting the "Close"  button at the top right of the form, OR select the "Back to EMN Menu"  button at the top right of the form.

## Adding an Email Recipient Group

Select the "Add Email Group"  button on the Email Notification options menu. The "Add Group to Distribution List" form will be displayed.

"Group Name" is the only required field on this form, so you can create an empty group if desired.

"Description" is an optional field for describing this group.

"Notes" is an optional field for any additional notes for this group.

"Available Users" will show a list of recipients(if any exist) that can be added to this group. Double-click the recipients name to transfer the recipient to the "Selected Users" list. OR, you may select the recipients name(single-click) and then select the "Move Selected Item Right"  button to transfer the

recipient to the "Selected Users" list. If this group is to contain ALL available recipients, select the "Move All Items Right"  button.

After all required fields are completed and all recipients have been selected, select the "Save"  button in the top right of the form. If saving the new group is successful, you will get a confirmation stating "Group Successfully Added to System" and the form will reset(clear) and is now ready to add another group, if desired.

To return to the Email Notification options menu, close the "Add Group to Distribution List" form by either selecting the "Close"  button at the top right of the form, OR select the "Back to EMN Menu"  button at the top right of the form.



## Adding a Scheduled Task

select the "Add Scheduled Task"  button on the Email Notification options menu. The "Add Scheduled Email Notification Task" form will be displayed.

"Task Name" is a required field. Task names must be unique.

"Description" is an optional field for describing this task

"Notes" is an optional field for any additional notes for this task

"Report/Message" is a required field. Select the report to send from a list of configured reports.

"Report Username" is a required field. This is the username used to access the database.

"Report Password" is a required field. This is the password used to access the database.

"Email Subject" is a required field. This is the text that will be used for the 'Subject' line of the email.

"Allow Blank Report" can be checked if you want a report to be sent even if it contains no data.

At least one user or group must be selected from the "Available Groups" or "Available Users" lists.

"Start This Task On" is a required field and defines the start date for this task. Select the "Open Calendar"  button to use the built in calendar.

"At" is used to define the start hour and start minute for this task, in 24 hour format.

For this tutorial we will configure a "One Time Only" event, but there are many other options for setting a schedule.

After all required fields are completed, all recipients have been selected, and a schedule has been set, select the "Save"  button in the top right of the form. When saving the new task is successful, you will get a confirmation stating "Task: <taskname> Added Successfully", along with the next execution for the task, and the form will reset(clear) and is now ready to add another task, if desired.

To return to the Email Notification options menu, close the " Add Scheduled Email Notification Task" form by either selecting the "Close"  button at the top right of the form, OR select the "Back to EMN Menu"  button at the top right of the form.

You now have a task that will run the selected report against the selected database and send the results via email to the list of selected recipients/groups on the date/s and time/s selected.

## Checking for Task Execution Warnings/Errors

If your recipients did not receive an email report after the designated date and time has passed, check for task errors or warnings by logging in to METDaemon Administration. Using the top toolbar select the "Task Warnings"  button. OR, using the left navigation menu, select the "Daemon and System Administration"  button, then the "Logs"  button, then the "Task Warnings"  button This

will display a list of all configured tasks and will show any errors that have been generated by each task, if any.

*NOTE: Warning messages are usually very literal and problems can be resolved by paying attention to the messages.*