## *Brief Overview of the IR Emailer*

The Interactive Reporting Emailer allows a user to schedule their favorites to be emailed to them on a regular basis. It accomplishes this by running once per day and sending any relevant reports to the specified email addresses.

Once the Emailer has been set up, the user can easily schedule a report to be emailed to them each day, week, or on a specified date each month.

Setting up the Emailer

1. Download the latest version of emailer33.zip from
   http://www.interactivereporting.com/v33/

2. Copy the contents of the emailer33 folder to the IR installation directory.

3. Run the batch file emailer_setup.bat in order to register all the dynamic-link libraries (DLLs) that are needed by the Emailer. Note: this file needs to be run with administrative privileges.

   - This will also launch the configuration interface where you can test the connection to your mail server. For more information on this, see the section below about the configuration interface.

4. The Emailer will need to be configured with the settings to communicate with the mail server. Most options can be set using the web interface by going to the System Settings tab in the Interactive Reporting Administration section. If additional options are needed, they can be added at the command line, see the section 'Command Line Parameters'.
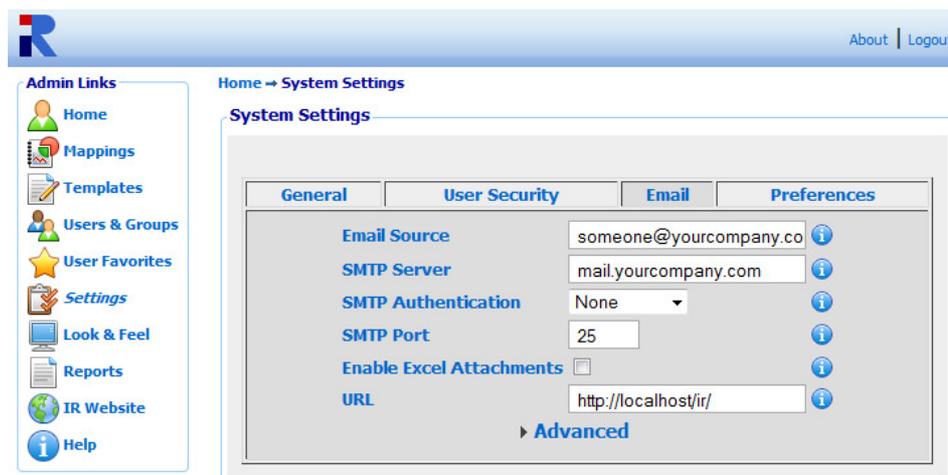
5. Next you need to set up a Windows scheduled task to run the Emailer once a day. Choose a time for when you would like the reports to be sent out.

6. You can test the Emailer by saving a favorite in IR to be emailed, and manually running the scheduled task.

Command Line Parameters

-excel

This enables the ability to send reports as excel attachments to the email. By default, this option is disabled because Microsoft Excel 2000/2002/2003/2007 must be installed on the server for this to work.

-fromname YOUR_NAME

This option allows you to specify the sender's name as it will appear in the email. The default is "Interactive Reporting". If YOUR_NAME is more than one word, then it must be encapsulated by double quotes, for example "Your Company Name".

-emailsource example@example.com

This option allows you to speicify the sender's email address as it will appear in the email. This allows you to override the sender's address setting that was specified in the Emailer Settings tab in the IR Administration.

-dsn DSN_NAME

This allows you to override the connection name used to connect to the IR system database. The default is ir_system33. Use -dsn relativemdb to use the relative system33.mdb database.

-url http://my_server/ir/

This allows you to specify the location to the IR web interface. If specified, this will override the setting from the Emailer Settings tab in the IR Administration.

-server mail.example.com

This allows you to specify the address of the mail server that you would like to send the emails through. If specified, this will override the setting from the Emailer Settings tab in the IR Administration.

-port 25

This allows you to specify the port on which to connect to the mail server. The default value for most SMTP mail servers is 25. If specified, this will override the setting from the Emailer Settings tab in the IR Administration.

-auth N

If the SMTP server requires that you authenticate before sending an email, then use this parameter to specify the authentication protocol to be used. N should be one of the following depending on the authentication method required by the mail server:

0. No authentication. (This is the default value)

1. Plain text authentication. Note: the username and password is sent in plain text.

2. Login authentication. This is a similar, insecure method to plain text authentication and is supported by most SMTP servers.

3. Cram MD5 authentication. A more secure method than plain text authentication.

4. NTLM Authentication (also known as Secure Password Authentication). This protocol is widely used with Microsoft products and services such as IIS SMTP and Microsoft Exchange. If you are connecting to a Microsoft Exchange server, this is most likely the authentication method you should use.

5. MSN Authentication. This is an authentication protocol used with MSN Services.

-user name@example.com

If the SMTP server requires you to authenticate before sending an email, then use this parameter to specify the username used.

-pass PASSWORD

If the SMTP server requires you to authenticate before sending an email, then use this parameter to specify the password used.

-ssl

The Emailer will use SSL when connecting to the SMTP server.

-starttls

If the SMTP server supports it, this parameter will allow the use of the STARTTLS protocol when communicating with the SMTP server. This allows a plain text connection to be upgraded to an encrypted connection if supported.

-smtptimeout N

This allows you to specify the connection timeout when connecting to the SMTP mail server, in N seconds.

-nolog

This turns off all logging. By default, the Emailer creates a log of its progress in a file named emailer.log.

-cdo

Convert SMTP authentication mode to equivalent in CDO

-configure

This will launch the configuration interface, which allows you to test the settings needed to communicate with the mail server. See the section titled 'Configuration Interface' for additional help with this.

-c CHARSET

This allows you to override the character set used when sending the emails. The default value is ISO-8859-1.

-fsend

This will force the Emailer to send emails regardless of whether it encountered and error. By default, the Emailer will not send reports that have generated errors or that have returned no results. The use of this option is only recommended as a debugging tool.

-oemail user@example.com

This allows you to override the email address that all the reports would be sent to. Any reports scheduled to be sent will be sent to this address instead when the Emailer is run with this option. This should only be used for testing.

-bcc user@example.com

This allows you to specify a blind carbon copy email address that each report will be sent to. The email will be sent to this address as well as the email address specified in the original scheduled email.

-debug

This will print the raw HTML for the report that was generated to the log file. This option is useful for debugging problems.

-alerts

This will run the mass alerts emailing feature of the Emailer. If favorites have been set up for mass emailing, then this will send out those emails. For details on configuring this, see the User Favorites page in the IR administration interface.

-reportid

Use only in conjunction with -alerts to email a specific report. See 'How to setup Mass Emailing.pdf' manual.

-id 22

This parameter will restrict the Emailer to only run for a specific favorite. This command should be followed by the ID of the favourite for which you want it to run. In the example above, the favorite with the ID 22 will be emailed out.

You can specify a list of IDs. For example *-id "1, 2, 3, 4"* would send out favorites with the IDs 1, 2, 3 and 4. Note that if you are specifying a list of IDs, they must be enclosed in double quotes.

You can email a range of report ids by entering the starting and finishing report ids e.g. emailer.exe -id 1:10

This feature also works for the alerts feature of the Emailer. In that case, the ID number should be the ID number (or ID list) of the alert you want to send out.

-mappingid 123

Allows the user to send all reports for a specific mapping id. E.g. -mappingid 123

-dashboardid 123

Allows the user to run the emailer for a specific dashboard using the dashboard id. In the example above, the dashboard with the ID 123 will be emailed out.

-enablemultitime

This paramater enables users to save new favorites with this extended scheduling ability. It allows the user to choose the time during the day which they would like their favorite emailed to them.

You only need to call this parameter once to enable the extended scheduling ability in the web interface of Interactive Reporting.

-convertschedules 08:00

If you are enabling the extended scheduling feature of the Emailer, this will convert any existing favourites that users have set up so that they work with this new scheduling ability. This parameter takes one extra argument which should be the time at which these reports should be sent out.

You only need to call this parameter once to convert the previous schedule to be compatable with the extended scheduling ability.

-multitime

This command line parameter should be added anytime you are running the Emailer as part of the extended schedulting ability.

-ignoremultitime

In a multitime system, this command allows reports to be sent regardless of the time, ignoring the scheduled 'Times Of Day' saved for the report. Please note, only the scheduled times are ignored, the week days or day of month are not ignored.

-fileformat csv

This allows you to specifiy an alternative file format for the email to be sent as. Currently the only available option is as a comma separated file (CSV). The Emailer uses Excel to generate the CSV file, so Excel is required for this to work. This parameter also requires that you have specified to send your email as an excel attachement and that -excel is specified.

-suppress XXX

This command line parameter allows you to remove certain strings from the generated report before sending. For example if you would like to see your report which does not contain any dollar signs, then you would specify -suppress $

This value you specify for XXX is very senstive. It requires that you specify the value exactly as it is generated in the HTML of the report. So, for example if you are trying to replace the Euro symbol; you would not just specify -suppress €. The Euro symbol is actually stored as '€' in the HTML, so you would need to specify -surpress "€" Note the double quotes around the €, this is because '&' has a special meaning to Windows as a command line paramter, so you need to escape it by surrounding it in double quotes. For help determining the correct value to specify, you may find -debug usefull, see -debug above.

You can specify as many -suppress XXX values as you would like, but you must specify -suppress for each one. For example -suppress XA -suppress XB -suppress XC. You may also specify longer string for -suppress, so long as they are surrounded in double quotes. For example, -suppress "string to remove"

-clearxlformatting

Clears all formatting from the generated excel file.

-sleep 10

Allows the user to set a time delay to pause between sending emails. In the example above, there will be a 10 second delay between each email being sent.

-ignoreschedule

Can force the emailer to send reports regardless of the time/day/month it is set to send on. Can be used to send all emails or can be used in conjunction with -id to send a specific email.

e.g. emailer.exe -ignoreschedule

-interval

In multitime systems, you can overwrite the time a report is sent by using this command. The 24 hour clock is divided into 0-47 x 30-min intervals.
e.g.
12:00am = 0;
12:30am = 1;
……
12:00pm = 24;
12:30pm = 25;
……
4:00pm = 32;
..etc..

To use this command, match the interval, with the time the report is set to be sent. If a report is set to run at 10:00am, then include *-interval 20* (the 30-min interval for 10:00am) in the command line arguments.
e.g.
emailer.exe -multitime -interval 20

-nounicode

Skip Unicode Formatting.

-location

Allows the user to export the report to a specific folder location. Reports will not be emailed when using this function.

e.g. emailer -location C:\myfolder\myfolder

-filename

Allows the user to email or export the report to a specific file name. There is no need to enter a file extension, the file extension will be determined by the format selected in the report.

e.g. emailer -filename myfile

-reportname

Each report will be emailed or exported as the favorite name.

e.g. emailer -reportname

-format

Allows the user to overwrite the format the report is emailed in or exported to. If a report is saved in the application as HTML format, it can be emailed in .csv format using the command *-format csv*. List of formats supported:

> *-format csv*
>
> *-format excel*
>
> *-format pdfp - PDF Portrait*
>
> *-format pdfl- PDF Landscape*
>
> *-format html*

-includedate

Will include the current date as part of the filename in YYMMDD format.

e.g. emailer -includedate

will result in file '[filename]_YYMMDD.xxx'

-includetime

Will include the current time as part of the filename in HHMMSS format.

e.g. emailer -includetime

will result in file '[filename]_HHMMSS.xxx'

-imageincluded

Prevents blank lines being deleted from the start of an Excel Report. To be used when embedding an image in a report using the Report Header field.

 e.g. emailer -imageincluded

Note: To embed an image in the report header use the following:

<tr ><td colspan=3 height="30"><img src = "http://www.interactivereporting.com/testimage.jpg"></td></tr>

-excludeid

Allows the user to omit a report or reports from being sent, using the report's id. If multiple reports are to be omitted then comma separate the ids.

e.g. emailer -excludeid 280 OR *e.g. emailer -excludeid 280,281,283*

-deletefile

The report will be deleted from the harddrive after it has been emailed.

e.g. emailer -deletefile

-archive

A soft copy of the report will be saved to the ..\Emailer33\Reports folder

e.g. emailer -archive

-date

Allows the emailer to be run for a specific date

e.g. emailer -date

-wkhtmltopdf

If IIS is configured to windows authentication (when Active Directory is being used), then the wkhtmltopdf application, used to generate the PDF file, needs HTTP authentication. Use a valid windows username and password.

e.g. emailer -wkhtmltopdf --username=[username] --password=[password]

-laststatus

Stores the last email status to the userreports table

e.g. emailer.exe -laststatus

-emailcount

Records the number of times a report has been successfully emailed.

e.g. emailer.exe -emailcount

-attachfile

Allows the user to include attach an external file to the outgoing reports.

e.g. emailer.exe -attachfile [filename]

Note, include the directory path of the file.

-lastemailed

Records the date the report was last emailed. Only logged when the command -lastemailed is used.

e.g. Emailer.exe -lastemailed

-connectionstring

Allows the user to send all reports for a specific connection string or for a partial connection string

e.g. Emailer.exe -connectionstring dsn=myDSN;uid=user;pwd=passwd;

-reporttimeout

If a report timesout, then the application pool is stopped and restarted, then the emailer tries again

e.g. Emailer.exe -reporttimeout

** Must have restartapppool.bat in the emailer folder

-apppoolname

Used in conjunction with -reporttimeout, where if a report times out, and the application pool differs from the default i.e. IR_APP_POOL_v33, the user can specify the application pool name

e.g. Emailer.exe -reporttimeout -apppoolname IR_APP_POOL_name

-reportsonly

Will only send reports (favorites) that are scheduled to be sent, i.e. ignores dashboards.

e.g. Emailer.exe -reportsonly

-dashboardsonly

Will only send dashboards that are scheduled to be sent, i.e. ignores reports (favorites).

e.g. Emailer.exe -dashboardsonly

-easyxls

This allows excel files be generated without the need for Excel

e.g. Emailer.exe -easyxls

-excelformat

Allows the user to specify .xls or .xlsx format. Default it .xlsx. This is used in conjunction with -easyxls

e.g. Emailer -easyxls -excelformat .xls

-emaillog

Sorts a record of emails sent and the status returned by the emailer. Needs the Email_Log table in the system33 database

e.g. Emailer -emaillog

-savemessage

Saves a copy of all out going emails as .eml files. Emails successfully sent are saved to a folder called 'Sent' in the emailer application path. Emails not sent are saved to a folder called 'Failed' in the emailer application path

e.g. Emailer.exe -savemessage

-sendmessage

Allows the user to send a previously saved email. One or multiple emails can be selected from a folder. If they are sent successfully, a copy will be saved to the 'Sent' folder and the original deleted. Those not sent are saved to the 'Failed' folder.

e.g. Emailer.exe -sendmessage

-sendfailed

Attempts to resend all email files (*.eml) stored in the ..*Emailer33\\Failed*\\ folder. If the email is sent sucessfully, the email file will be moved to the ..*Emailer33\\Sent* folder. If it fails again, it will remain in the *Failed* folder.

e.g. Emailer.exe -sendfailed

-delta

Puts yesterday's date in the subject line of the email.

e.g. Emailer.exe -delta

Configuration Interface

This is a graphical interface that allows you to test your connection to the mail server and send a test email. It can be used to test what settings are needed so that the Emailer can communicate with your mail server.

The interface can be launched by running the Emailer from the command line with the -configure option. You should see something similar to the following screenshot.
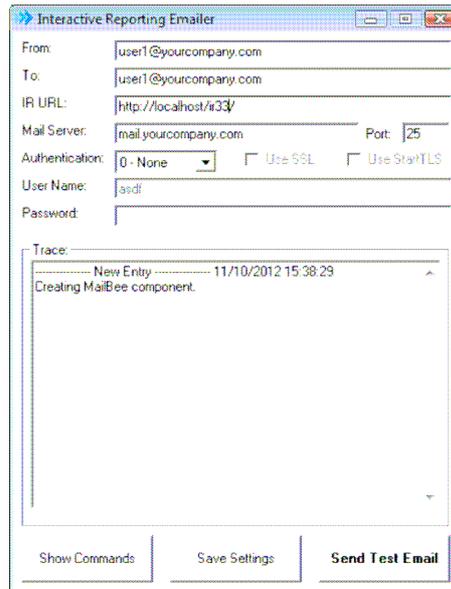
Fill in your mail server details and the 'from' & 'to' addresses. If your mail server requires authentication, use the dropdown box and the username & password boxes to set this. Click 'Send Email' to test your settings.

You should see something similar to the following screenshot if the test email was successful.
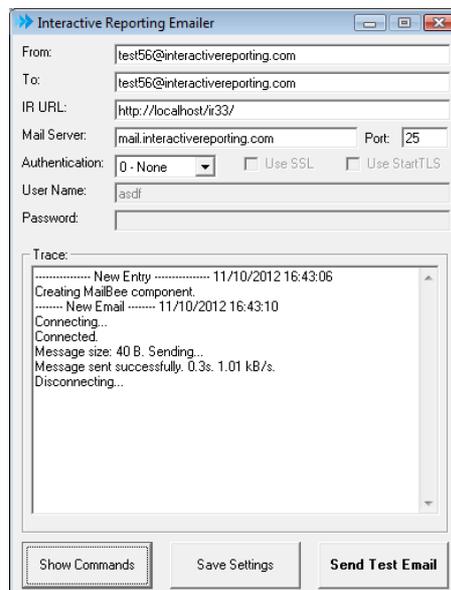
Alerts

What is the alerts feature of the Interactive Reporting Emailer?

The alerts feature gives you the ability to email a large number of similar reports to a list of users. Instead of scheduling an individual favorite for each user to be emailed out, you can create one favorite and provide a list of emails to send that report to.

This feature allows you to parameterize individual reports. For example, if I wanted to send each Sales Rep a report showing their sales broken down by customer, you would save a favorite which would generate such a report for an individual Sales Rep. Then with the alerts feature, you could give the Emailer a list of Sales Reps and their email address. The report will be generated for each individual Sales Rep and emailed to them individually.

How do I set up some alerts?

You must be logged into the administrator interface of Interactive Reporting to set up some alerts. Once you log into the administrator interface of Interactive Reporting, click on the User Favorites section. You will see a list of your user's favorite reports.

To configure the mass emailing of one of these reports, first click on the edit icon next to the report. Then click on the link 'Set up mass emailing'. You should be presented with a screen like this:
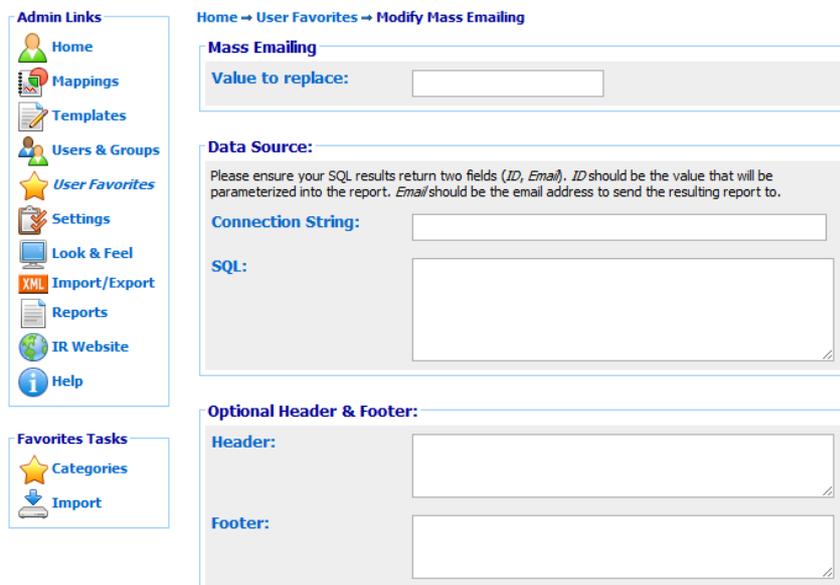
Once you have filled in the required values click save.

How do I parameterise each individual report?

If you wanted to parameterise a report by Sales Rep for example, you must first save the favorite with a Sales Rep filter applied. The 'Value to replace' field should be the value of the filter you applied in the favorite.

This filter will then be replaced with the individual 'id' parameters from your SQL and a report generated from that.

How do I provide the list of emails to send to?

When setting up an alert, you must specify a data source from where to retrieve the list of users to send each generated report to. The connection string field allows you to specify the connection to the database containing your list. Then specify the SQL in the area below.

The SQL must return two fields from the database. 'id' should be the value to be parameterized into the report. 'email' should be the address to send the report to. The example below shows an example configuration.

How do I configure the Emailer to send my alerts?

To tell the Emailer to send out the alerts you must run the Emailer.exe with the parameter *-alerts*

If you are currently using any other command line parameters when running the Emailer, then you must include those as well.

For more information on using alerts please refer to the 'How to setup Mass Emailing' document.

Help & FAQ

What time should I schedule the Emailer to be run?

Choose the time when you would like the users to start receiving the emails. Usually a time in the early hours of the morning is best so that your users will receive the emails first thing when they arrive in that morning.

If you have a nightly import program that runs on the database, make sure it does not clash with that. Make sure you choose a time where you can be sure that the import will have finished.

My mail server supports authentication, but don't know which one to use.

You may test the authentication needed by using the configuration interface of the Emailer. Choose from the dropdown list of the available options. See the section titled 'Configuration Interface' for additional help with this.

I am receiving the email, but not as an excel attachment.

You need to ensure that the -excel command line option is being used when the Emailer is run. If this option is not included, then the email will be sent as HTML instead.

Some reports are coming through, but none with excel attachments.

This is most likely a problem with the version of Microsoft Office Excel that is installed on the server. Please see the -excel command line option above for the list of supported versions.

There are some issues with automating Microsoft Office Excel 2007+ on Windows Server 2008. Excel requires that one of the following directories exists before it can be automated to generate the Excel attachement:

1. If you are running Windows Server 2008 x64, please create this folder: C:\Windows\SysWOW64\config\systemprofile\Desktop

2. If you are running Windows Server 2008 x86, please create this folder: C:\Windows\System32\config\systemprofile\Desktop

I have followed all the steps but I am still not receiving my emails.

This may be for a couple of reasons. The Emailer generates a log file, emailer.log, this should give details if errors are occurring.

1. If your mail server is using authentication, make sure you have the correct login details and settings. If the Emailer is able to connect to the mail server, but the mail server is still refusing to allow it to send emails, then there will be more details on this in the log file, emailer.log.

2. The Emailer may not know where to find the Interactive Reporting webpage. It needs to be able to contact this to generate the reports. Go to the Email tab of the System Settings in the IR web administration section. Make sure you have the 'URL' field set to the correct location of IR.

3. Ensure that the scheduled task is being run. Windows might not have been able to run the Emailer at that particular time, because of a system restart for example. Check the scheduled task log for details.

How do I find the ID of my favorite to use in the -id parameter?

When you are logged in to the administration interface of Interactive Reporting, go to the User Favorites section. Then find the row corresponding to the favorite you are interested in. If you hover over the Edit button on the right hand side, in your status bar you should see a URL in the form …user_favorite.asp?report_id=123… This is the ID of that favorite.

I am having trouble authenticating against a Microsoft Exchange server.

Microsoft Exchange server supports three authentication methods: basic, NTLM, and basic through SSL. Each of these methods requires that you have an account with a username and password on the server. Make sure you have tried each of these authentication methods.

Depending on the configuration of your Exchange server, it may require you to specify your username without the domain. For example, if your email address is 'someone@example.com' then your username would just be 'someone'.

I am not receiving any emails and the log file says that the server 'does not permit relaying'.

This means that your mail server requires you to authenticate with a username and password before it will allow you to send emails to email addresses outside of your domain. Make sure you have configured the Emailer to authenticate with the mail server and that the account details are valid.

You may want to run with the -configure option to test this (see command line parameter -configure above).

I am not receiving any reports set to send in PDF format, however all other reports are coming through successfully.

For the PDF generation to work correctly, the emailer must be run against an anonymous web application, instead of one that is running with Windows Authentication. In IIS, create a new IR_emailer application, pointing to the IR_Source directory. Under Authentication, disable Windows Authentication and Enable Anonymous Authentication. Use this URL e.g. http://localhost/ir_emailer/ in emailer configuration as the IR URL. Alternatively see -wkhtmltopdf above.

To send emails with Office 365

Set the smtp server to smtp.office365.com
Port to 587
Auth method = 2
Check SSl
Check StartTLS

You also need a valid username & password.

Specific Operating System Requirements

If running Windows Server 2008 or higher the following folder needs to exist:
On a 64-bit machine - C:\Windows\SysWOW64\config\systemprofile\Desktop
On a 32-bit machine - C:\Windows\System32\config\systemprofile\Desktop

If running Windows Server 2012 or higher the following folder needs to exist:
On a 64-bit machine -
C:\Windows\SysWOW64\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache
On a 32-bit machine -
C:\Windows\System32\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache