

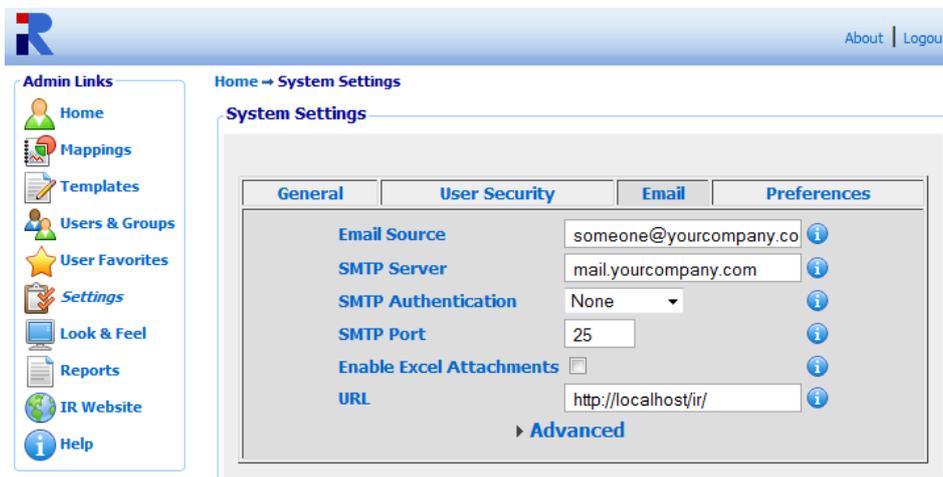
Brief Overview of the IR Emailer

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 emailer32.zip from <http://www.interactivereporting.com/v32/>
2. Copy the contents of the emailer32 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".

-dsn DSN_NAME

This allows you to override the connection name used to connect to the IR system database. The default is ir_system32.

-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 Mailer 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 Mailer creates a log of its progress in a file named `emailer.log`.

-nomailerlog

This reduces the level of logging and leads to a less verbose log file. By default, the Mailer will log its progress as it communicates with the mail server. The Mailer will not write this information to the log if this option is specified.

-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 Mailer to send emails regardless of whether it encountered an error. By default, the Mailer 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 Mailer 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 Mailer. 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.

-id 22

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

You can also 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.

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

-enablemultitime

This parameter 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 0800

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 compatible with the extended scheduling ability.

-multitime

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

-fileformat csv

This allows you to specify 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 attachment 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 sensitive. 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 parameter, so you need to escape it by surrounding it in double quotes. For help determining the correct value to specify, you may find `-debug` useful, 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"`

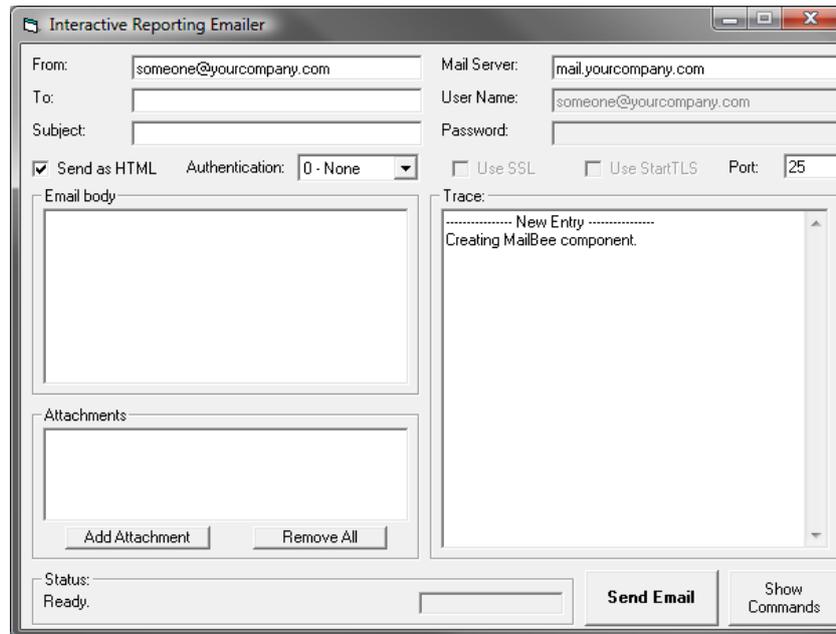
-clearxlformatting

Clears all formatting from the generated excel file.

Configuration Interface

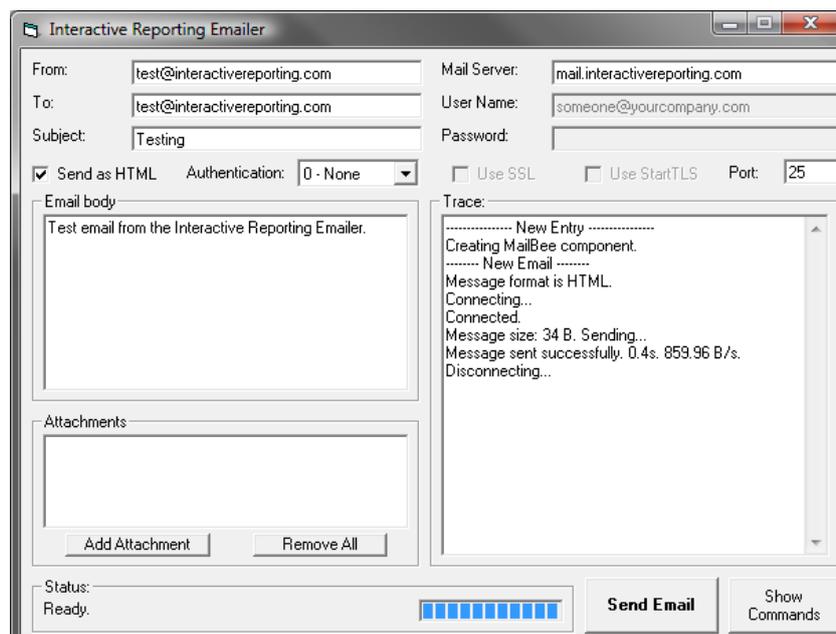
This is a graphical interface that allows you to test your connection to the mail server and send a test email. It can be used to test what settings are needed so that the Mailer can communicate with your mail server.

The interface can be launched by running the Mailer 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:

The screenshot shows the 'Modify Mass Emailing' configuration page. On the left is a navigation menu with 'Admin Links' (Home, Mappings, Templates, Users & Groups, User Favorites, Settings, Look & Feel, Import/Export, Reports, IR Website, Help) and 'Favorites Tasks' (Categories, Import). The main content area has a breadcrumb trail: 'Home → User Favorites → Modify Mass Emailing'. Below this are three sections: 1. 'Mass Emailing' with a 'Value to replace:' text box. 2. 'Data Source:' with a note: 'Please ensure your SQL results return two fields (ID, Email). ID should be the value that will be parameterized into the report. Email should be the email address to send the resulting report to.' It includes a 'Connection String:' text box and a larger 'SQL:' text area. 3. 'Optional Header & Footer:' with 'Header:' and 'Footer:' text boxes.

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.

Data Source:

Please ensure your SQL results return two fields (*ID*, *Email*). *ID* should be the value that will be parameterized into the report. *Email* should be the email address to send the resulting report to.

Connection String:

SQL:

```
SELECT
    EmployeeID AS ID,
    EmployeeEmail AS Email
FROM Employees
```

How do I configure the Mailer to send my alerts?

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

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

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.

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.

If you are looking for the ID corresponding to an alert email you have set up, then you will have to open your system32.mdb. Open up the mass_reports_to_email table and look for the value under the ID column.

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 Mailer 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).

My users would like the ability to customize the time that they get their emailed reports. Is this possible?

Yes. FIXME