

Using Email Notification

Email Notification is a feature that allows you to send reports at a regularly scheduled time as an attachment in an email to recipients. Reports are in Adobe® PDF format and can be sent to one or more PCS Axis users as well as to non-PCS Axis users. You can set up email notifications with email reports that only include data for pipeline segments assigned to a recipient as well as pipeline segments assigned to an email report.

IMPORTANT: Because some email servers are set up to process emails no larger than 10 MB (megabytes) in size, it may be necessary to contact your IT department for this information to ensure email recipients receive email notifications.

Topics in this section include those in the following list and are intended for users with *SysAdmin* permissions:

- *Adding Email Recipients* (page 573)
- *Adding an Email Report* (page 579)
- *Assigning Reports by Recipient or Email Report* (page 584)
- *Viewing the Log* (page 587)
- *Re-sending Reports* (page 588)
- *Stopping Delivery of Email Notifications* (page 589)

NOTE: Using *Email Notification* requires property settings in *Options (Tools > Options)*. For more information refer to *Setting Email Notification Options* (page 44).

Adding Email Recipients

Information in this section explains how to add email recipients of reports. Email recipients are both users and non-users of PCS Axis and can be set up with more than one email address. Topics in this section include:

- *Adding a PCS Axis User*

- *Adding an External User* (page 577)

NOTE: Do not assign all pipeline segments in the hierarchy to recipients of email reports. Doing so may cause server problems when sending email notifications.

Likewise, use a limited hierarchy selection for users with *SysAdmin* privileges. Email reports are generated based on the hierarchy view in *Email Notifications* for *SysAdmin* users, which is ALL pipeline segments in PCS Axis.

Adding a PCS Axis User

The following procedure explains how to add a PCS Axis user in *Email Notification*. The process includes assigning one or more pipeline segments to the PCS Axis user. This allows PCS Axis to send email reports that include data *only* for those pipeline segments assigned to the PCS Axis user.

Complete the following steps:

- 1 Click **Tools** > **Email Notification** to open the *Email Notification* window.
- 2 Click **+ Add Pcs Axis User** to display a list of PCS Axis users. All PCS Axis users added in *User Management* (*Tools* > *User Management*) display in the center panel of the *Email Notification* window.
- 3 Select a user name in the center panel (Figure 12-1).

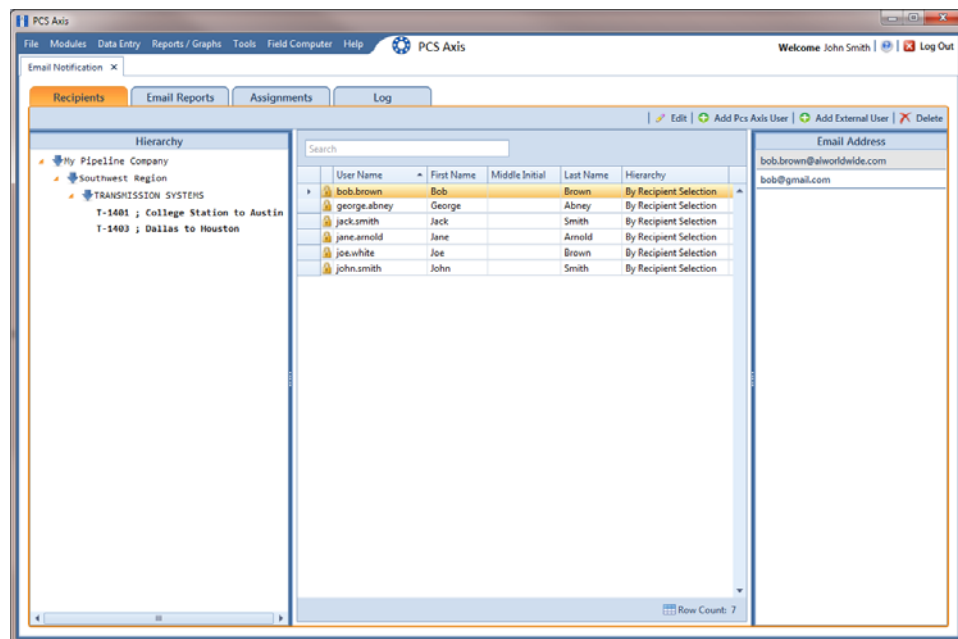





Figure 12-1. Recipients / Add PCS Axis User


- 4 If PCS Axis is set up with *Hierarchical Security* in system *Options (Tools > Options)*, click the down arrow in the **Hierarchy** field and select one of the following options. Your selection determines which pipeline segments are assigned to the user.
 - Select **By Hierarchy Security** if you want to use the same pipeline segments assigned to the user in *Hierarchy Rights* of *User Management (Tools > User Management)*.
 - Select **By Recipient Selection** if you want to assign one or more pipeline segments to the PCS Axis user in the *Hierarchy* panel of the *Recipients* tab.

NOTE: For information about *Hierarchical Security*, refer to *Setting Security Options* (page 52) and *Setting Up User Management* (page 187).

- 5 If **By Recipient Selection** is selected in the *Hierarchy* field, click the  toggle arrow in the *Hierarchy* panel to view a list of pipeline segments in the hierarchy. Click the check box for each pipeline segment you want to assign to the user.

A check mark inside the check box indicates a selection. To clear a selection, click the check box to remove the check mark.

NOTE: Clicking the  toggle button in the  information bar displays information related to required property settings.

- 6 If you want to add an additional email address for the PCS Axis user, complete the following steps:
 - a Click  **Add Email** to open the *Add Email Address* dialog box (Figure 12-2).

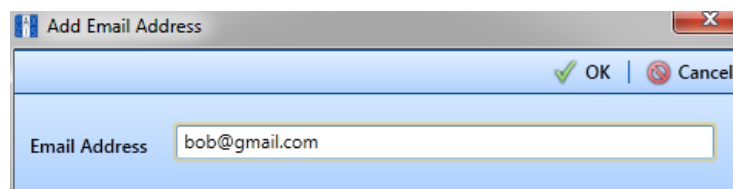


Figure 12-2. Add Email Address

- b** Type an email address in the **Email Address** field and then click **OK**. Repeat this step as needed to add another email address.
- 7** Click **Save** to save changes.

The *Email Address* panel displays all email addresses set up for a user selected in the center panel (Figure 12-3).

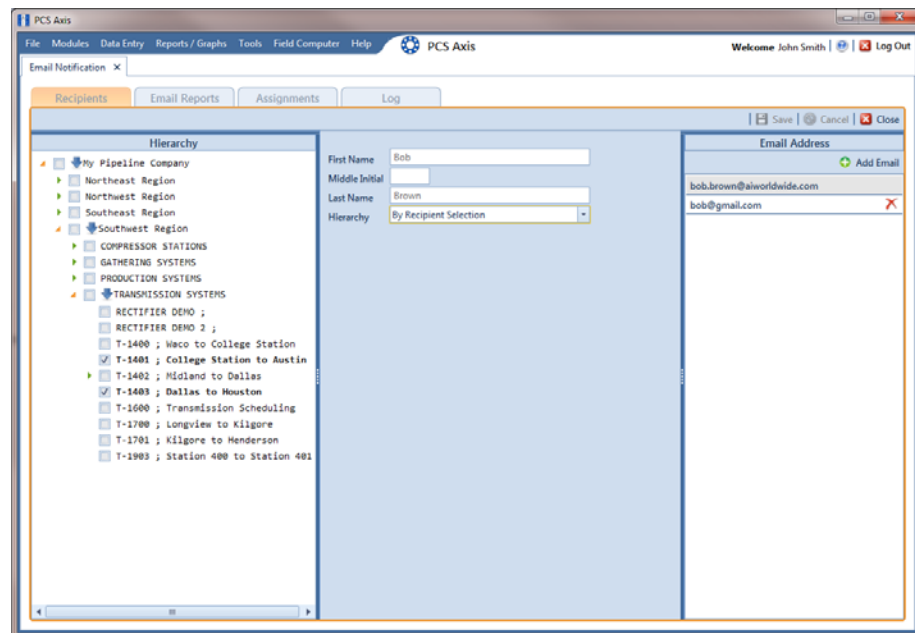




Figure 12-3. Recipients / Email Address

Adding an External User

An external user is a person who is not set up with login credentials for PCS Axis in *User Management (Tools > User Management)*. The following procedure explains how to add an external user as a recipient of one or more email reports.

Complete the following steps:

- 1 Click **Tools > Email Notification** to open the *Email Notification* window.
- 2 Click **+ Add External User**. Type the user's **First Name**, **Middle Initial** (optional), and **Last Name** in the respective fields located in the center panel of the window (Figure 12-4).

NOTE: Clicking the  toggle button in the  information bar displays information related to required property settings.

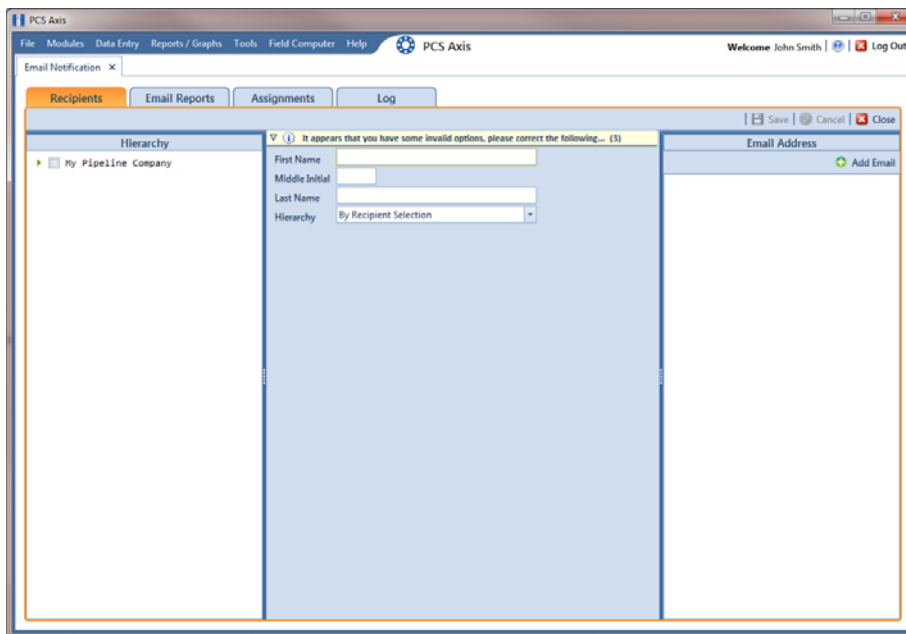


Figure 12-4. Recipients / Add External User

- 3 Click **+** **Add Email** to open the *Add Email Address* dialog box (Figure 12-5). Type the user's email address in the **Email Address** field and then click **✓ OK**. Repeat this step as needed to add another email address.

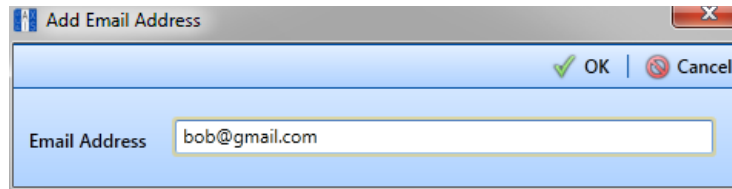


Figure 12-5. Add Email Address

- 4 Click the toggle arrow **▶** in the *Hierarchy* panel to view a list of pipeline segments in the hierarchy. Click the check box for each pipeline segment you want to assign to the user (Figure 12-6).

Assigning pipeline segments to the external user allows PCS Axis to send email reports with data *only* for those pipeline segments assigned to the external user.

A check mark inside the check box indicates a selection. To clear a selection, click the check box to remove the check mark.

- 5 Click **Save** to save changes.

The *Email Address* panel displays all email addresses set up for a user selected in the center panel (Figure 12-6).

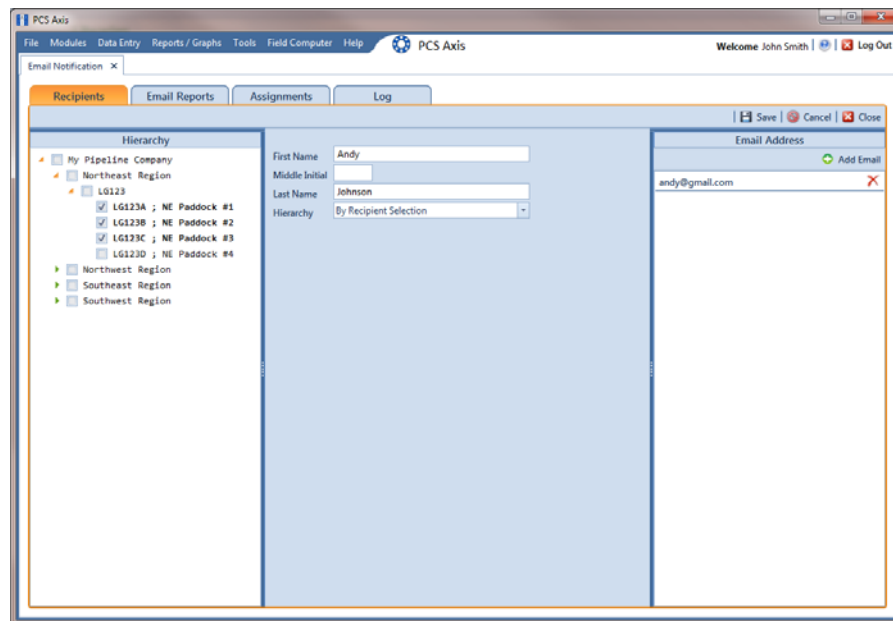


Figure 12-6. Recipients / External User

Adding an Email Report

An email report is a named set of property settings that define the content and transmission schedule of emails sent to recipients. It is the definition file that identifies the PCS Axis report, pipeline segment selection(s), and transmission schedule. Email reports are set up independently of email recipients. This allows you to assign the same email report to more than one recipient.

An email report can include any columnar report available in the *Reports/Graph* menu. Custom columnar reports must also be set up with the *public* property setting. Graph reports are not currently supported in *Email Notification*.

NOTE: For information about custom columnar reports and the *public* property setting, see *Adding a Custom Report* (page 742).

To add an email report, follow these steps:

- 1 Click **Tools** > **Email Notification** to open the *Email Notification* window.
- 2 Click **Email Reports** Email Reports, then click + **Add** (Figure 12-7).

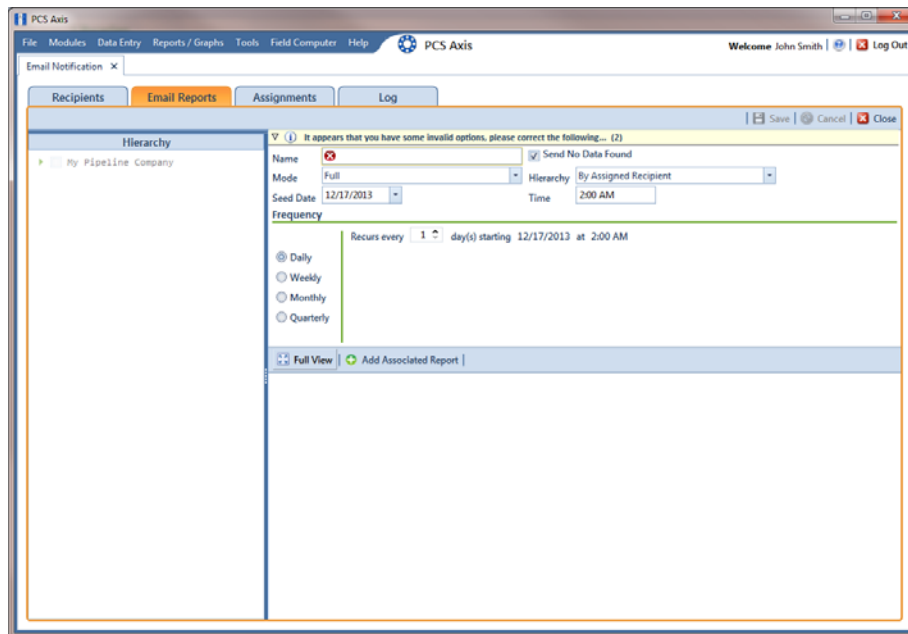






Figure 12-7. Email Reports

- 3 Type a name for the email report in the **Name** field. Fields requiring information include a  icon, such as *Name* shown in the previous example (Figure 12-7, page 579).

The filename of the PDF report sent as an attachment in an email to recipients includes the *Name* of the email report and transmission date. This same information is used as the *Subject* of the email, such as *My_Email_Report_03_10_2013.pdf*.

NOTE: Clicking the  toggle button in the  information bar displays information related to required property settings.

- 4 Complete one of the following steps to set the check box *Send No Data Found*:
 - a To always have an email sent to recipients, including when no report data is found, click the check box **Send No Data Found** to place a check mark inside the check box. When no report data is found, the recipient receives a report with the message *No Data Found*.
 - b To only send a report to an email recipient when report data is found, clear the check mark by clicking the check box **Send No Data Found**.
- 5 Choose which data to include in the report. Click the down arrow in the **Mode** field and select one of the following options:
 - *Full*: Report includes current and historical data.
 - *Incremental*: Report only includes new data that has occurred since the last time the report was sent to email recipients.
- 6 Click the down arrow in the **Hierarchy** field and select one of the following options that determine which pipeline segments to include in the report:
 - *By Assigned Recipient*: Report includes data *only* for those pipeline segments assigned to a recipient in the *Recipients* tab of *Email Notification*.
 - *By Email Report Selection*: Report includes data *only* for those pipeline segments assigned to the email report in the *Hierarchy* panel of the *Email Reports* tab in *Email Notification*.

- 7 If you selected *By Email Report Selection* in step 6, complete the following steps to select which pipeline segments to include in the email report:
 - a Click the toggle arrow  in the *Hierarchy* panel to view a list of pipeline segments in the hierarchy (Figure 12-8).

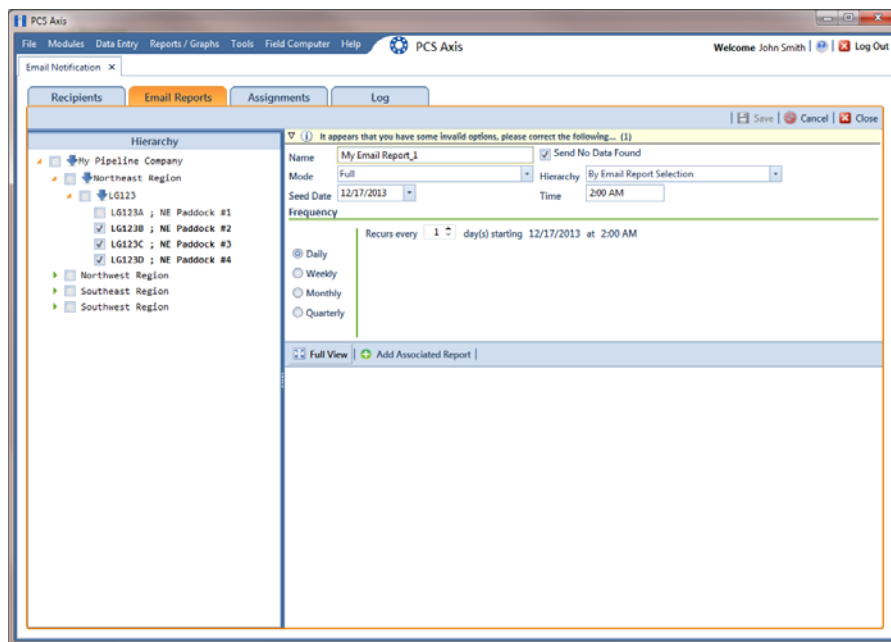


Figure 12-8. Email Reports


- b Click the check box for each pipeline segment you want to include in the report. A check mark inside the check box indicates a selection. To clear a selection, click the check box to remove the check mark. In the following figure, pipeline segments *LG123-D* and *LG123-E* have been selected in the *Hierarchy* panel.
- 8 Complete the following steps to set up a transmission schedule for sending email reports to recipients.

IMPORTANT: When setting up a transmission schedule, consider a time and frequency interval that does not impact other network services or computer resources.

- a Choose a date to begin sending the report. Click the down arrow in the **Seed Date** field to select a start date using a calendar.

- b** If you want to override the default time set up in *Options* for sending reports, enter a time in the **Time** field. Use 12-hour time format to indicate the hour, minute, and AM/PM setting (HH:MM AM/PM).

NOTE: For more information about *Options*, see *Setting Email Notification Options* (page 44).

- c** Choose how often to send reports to email recipients. Select one of the following options to set a *Frequency* schedule:
 - *Daily*: Sends first report on the *Seed Date* and recurring reports at regular intervals based on the *Rekurs every* setting.
 - *Weekly*: Sends first report on the *Seed Date* and recurring reports at regular intervals based on settings for *Rekurs every* and a day of the week selection.
 - *Monthly*: Sends first report on the *Seed Date* and recurring reports at regular intervals based on day and month settings.
 - *Quarterly*: Sends first report on the *Seed Date* and recurring reports at regular intervals based on the first day of each quarter.
- 9** To select a PCS Axis report to send to email recipients, follow these steps:
- a** Click  **Add Associated Report** to open the *Add Associated Report* window (Figure 12-9).

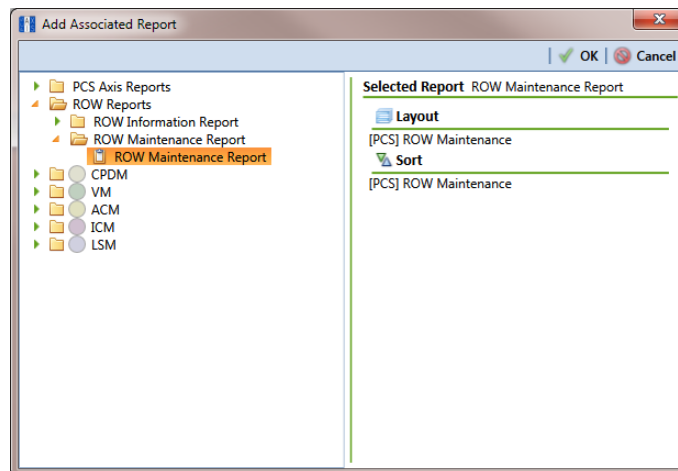




Figure 12-9. Add Associated Report

- b** Double-click a  folder to view a list of reports available for selection. Clicking the  toggle arrow for a report category also displays available reports.

For example, double-clicking **ROW Reports** > **ROW Maintenance Report** displays a list of reports available for selection.

- c Select a report in the list to move it to the *Selected Report* panel and then click **OK**.

- 10 Click **Full View** to only display fields for setting report options. Clicking *Full View* again displays all fields (Figure 12-10).

NOTE: Clicking the *Hierarchy* bar hides the *Hierarchy* panel. Clicking the bar again opens the panel.

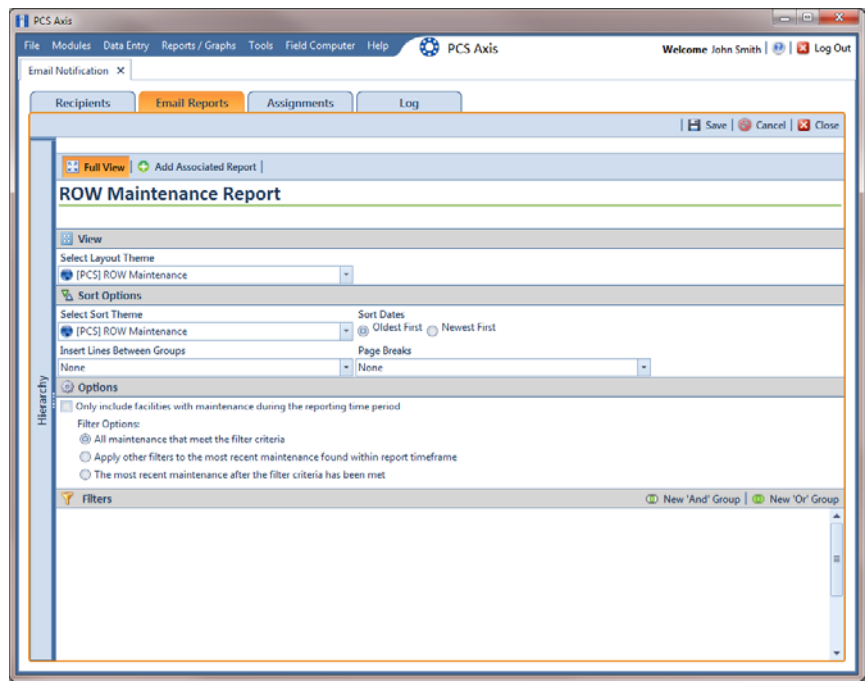


Figure 12-10. Email Reports

- 11 Set report options as required, such as a layout and sorting theme. For more information about report options, see *Working with a Report Based on the Columnar Report Style* (page 732).

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

- 12 Click **Save**.

Email reports currently set up in the system display in the *Email Reports* window as shown in Figure 12-11.

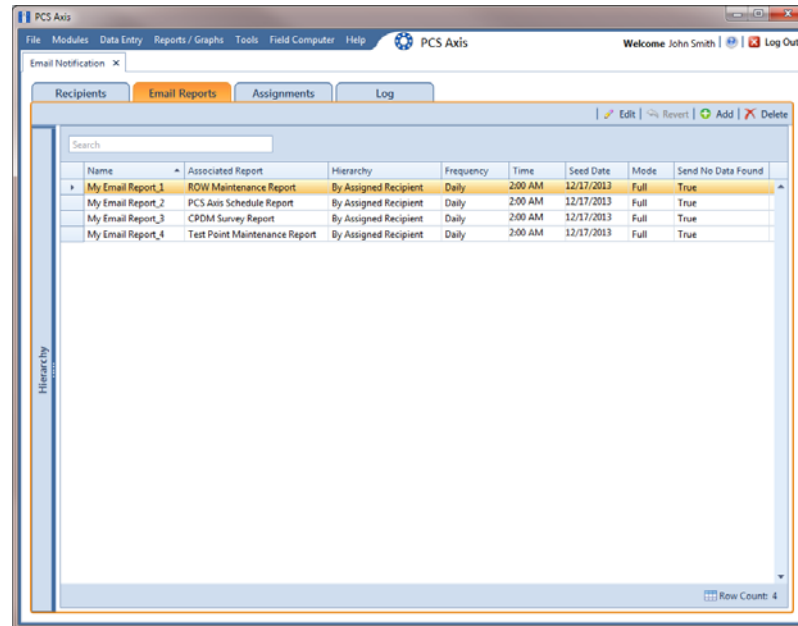


Figure 12-11. Email Reports

Assigning Reports by Recipient or Email Report

Assigning email reports *By Recipient* allows PCS Axis to only include data for pipeline segments assigned to the recipient in the *Recipients* tab of *Email Notification*. When assigning email reports *By Email Report*, the report only includes data for pipeline segments assigned to the email report in the *Email Reports* tab of *Email Notification*.

To assign an email report either *By Recipient* or *By Email Report*, follow these steps:

- 1 If the *Email Notification* window is not open, click **Tools > Email Notification**.
- 2 Click **Assignments** **Assignments** and then click **Add/Remove Assignments**.
- 3 To include data in an email report *only* for those pipeline segments assigned to a selected recipient, complete the following steps:
 - a Click **By Recipient** **By Recipient** if it is not selected (Figure 12-12).

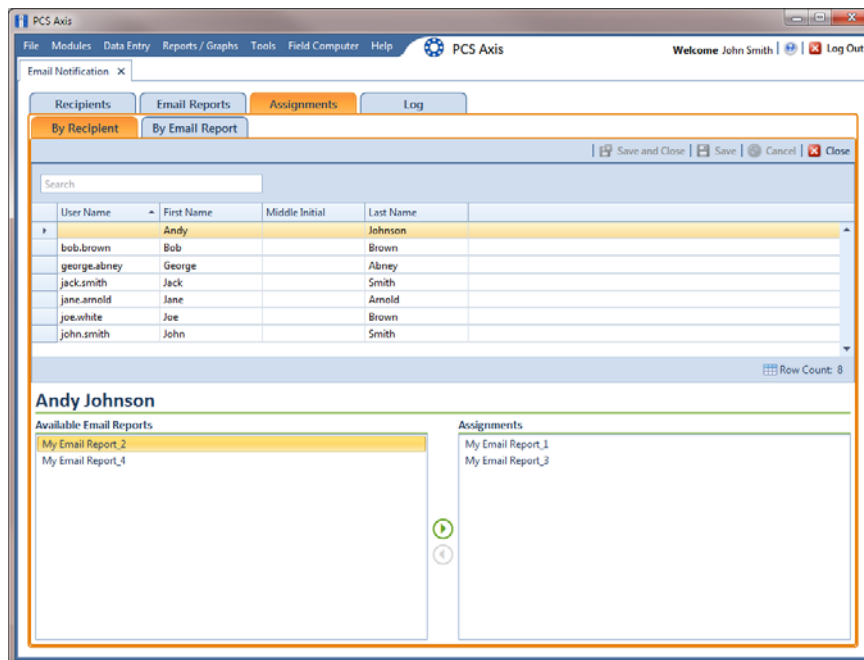




Figure 12-12. Assignments By Recipient

- b** Select an email recipient in the grid and then double-click a report in the *Available Email Reports* panel to move the report to the *Assignments* panel. Repeat this step as needed for another email recipient listed in the grid.

Clicking the  top arrow button also moves a selected report to the *Assignments* panel.

- c** Click  **Save**.
- 4** To include data in an email report *only* for those pipeline segments assigned to the email report, complete the following steps:
- a** Click **By Email Report** **By Email Report** (Figure 12-13).

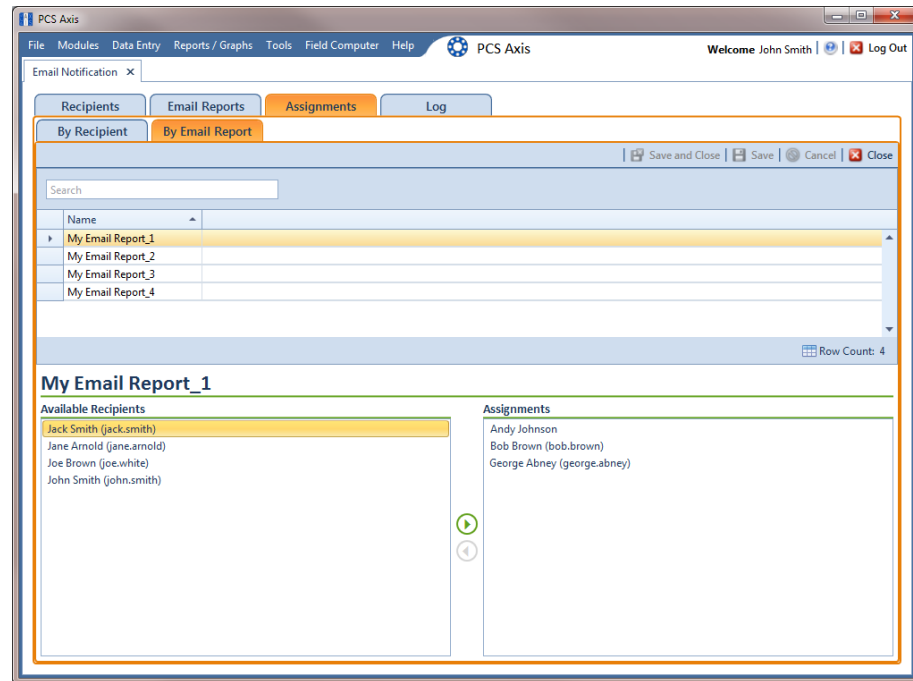



Figure 12-13. Assignments by Email Report

- b** Select an email report in the grid and then double-click a recipient user name in the *Available Recipients* panel to move the user name to the *Assignments* panel. Repeat this step as needed for another email report listed in the grid.

Clicking the  top arrow button also moves a selected user name to the *Assignments* panel.

- c** Click  **Save**.

Viewing the Log

The *Email Notification* log is an activity log that identifies PCS Axis reports sent to email recipients. It includes a transmission date; whether or not email reports transmitted successfully; and set up information such as *Frequency* and *Mode* settings in the *Email Reports* tab of *Email Notification*.

If your computer is installed with Adobe® Reader, you can also view a copy of a report sent to an email recipient by clicking the *Preview* button in the *Details For* group box (Figure 12-14). Clicking *ReSend* for a selected email recipient in the *Recipients For* group box allows PCS Axis to re-send reports assigned to the user.

NOTE: PCS Axis retains log information and associated email reports in PDF format for the length of time specified in system *Options*. See *Setting Email Notification Options* (page 44) for more information.

To open the *Email Notification* log, follow these steps:

- 1 If the *Email Notification* window is not open, click **Tools > Email Notification**.
- 2 Click Log **Log** to open the *Email Notification* log (Figure 12-14).

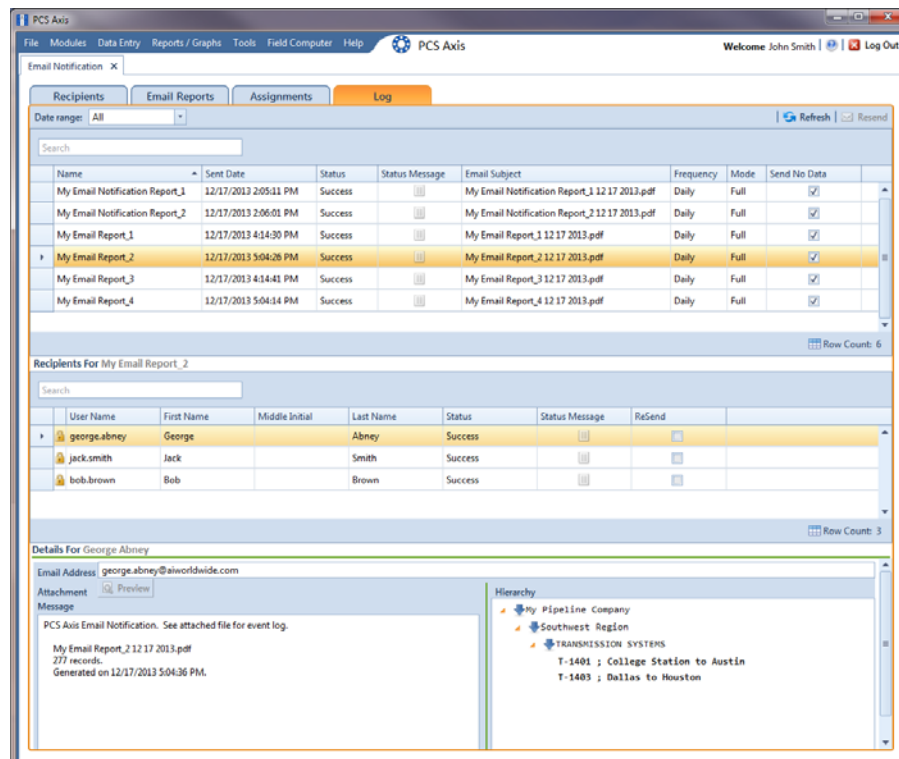
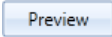


Figure 12-14. Email Notification Log

- 3 Click the down arrow in the **Date range** field and select an option, such as *Last 24 hours*.
- 4 To sort information alphanumerically in ascending or descending order, click a column heading in the reports grid or in the *Recipients For* group box.

NOTE: When navigating the reports grid, pressing *Home* on the computer keyboard moves the cursor to the top of the grid. Clicking *Full View* opens and closes the panels *Recipients For* and *Details For* allowing you to view only the reports grid.

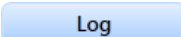


- 5 To view a copy of a report sent to an email recipient:
 - a Select a report in the list and then select an email recipient in the **Recipients For** group box. Information related to your selections display in the *Details For* group box.
 - b Click  **Preview** to open a copy of the selected report in Adobe Reader.

Re-sending Reports

The following procedure explains how to re-send a report to an email recipient.

NOTE: You can also re-send a report to an email recipient using the *Job History Detail Log* in *Job Service Viewer*. For more information refer to Table 11-2 in *About Job Service Viewer* (page 562).

Complete the following steps:

- 1 If the *Email Notification* window is not open, click **Tools > Email Notification**.
- 2 Click  **Log** to open the *Email Notification* log (Figure 12-14, page 587).
- 3 Select a report in the list and then select an email recipient in the **Recipients For** panel. Click the **ReSend** check box for the selected recipient to place a check mark inside the check box. Then click  **Resend**.
- 4 Click  **Refresh** to update information displaying in the window.

The report is sent as a PDF attachment in an email to the recipient. The following figure shows an example of a typical email notification in Microsoft® Outlook® (Figure 12-15).

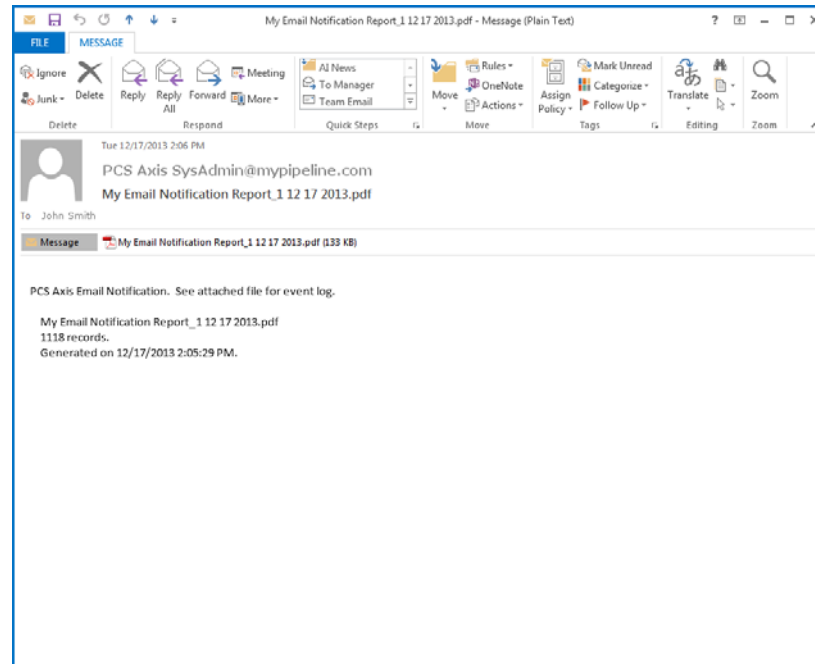


Figure 12-15. Example of Email Notification

Stopping Delivery of Email Notifications

Complete step 1 to stop sending scheduled email notifications to *all* recipients, or step c for one or more recipients:

- 1** To stop sending scheduled email notifications *to all recipients*, follow these steps:
 - a** Click **Tools > Options** to open the *Options* window.
 - b** Click the **Email Notifications** tab to view property settings for *Email Notification* (Figure 12-16).

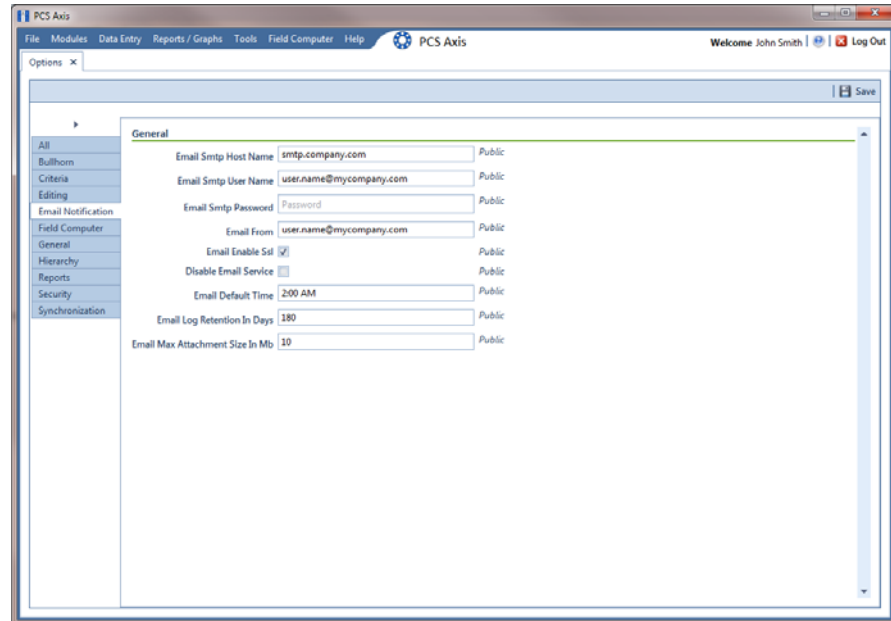



Figure 12-16. Options / Email Notification

- c Click the check box labeled **Disable Email Service** to place a check mark inside the check box. A check mark inside the check box indicates the service is disabled; scheduled email reports are no longer sent to recipients.

When you want to restart the service and begin sending scheduled email reports to recipients again, click the **Disable Email Service** check box to remove the check mark.

- 2 To stop sending scheduled email notifications to *one or more recipients*, follow these steps:
 - a Click **Tools > Email Notification > Assignments** tab. Then click  **Add/Remove Assignments** to open the *Email Notification Assignments* window (Figure 12-17).

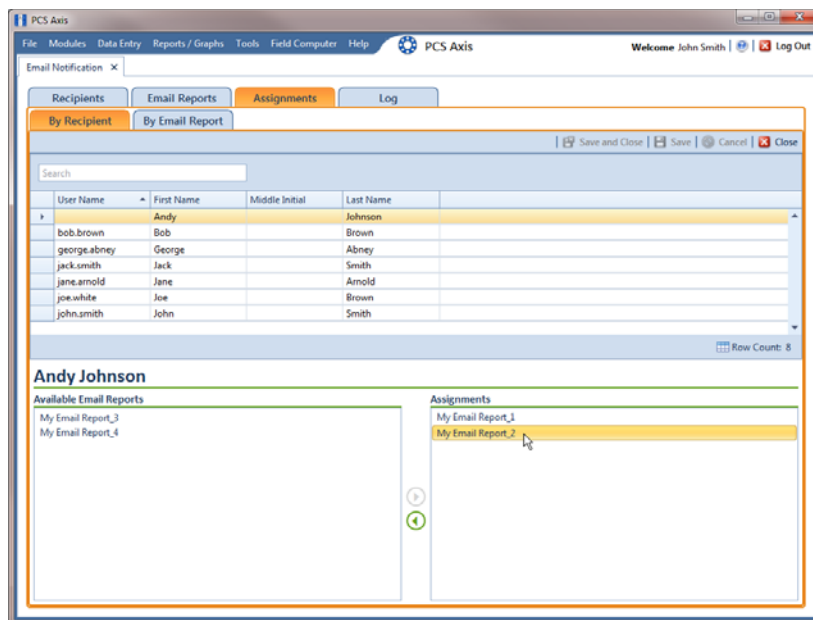




Figure 12-17. Email Notification Assignments By Recipient

- b Select how you want to view report assignments. Click **By Recipient** **By Recipient** to view report assignments by recipient or **By Email Report** **By Email Report** to view assignments by report.
- c If you are viewing report assignments *By Recipient*, complete the following steps:
 - 1) Select a recipient name in the grid.
 - 2) Double-click a report in the *Assignments* pane to move it to the *Available Email Reports* pane. Then click  **Save**. The recipient receives email notifications only for those reports listed in the *Assignments* pane (Figure 12-17).

- d If you are viewing report assignments *By Email Report*, complete the following steps:
 - 1) Select the name of an email report in the grid.
 - 2) Double-click a recipient name in the *Assignments* pane to move it to the *Available Recipients* pane. Then click  **Save**. The email report is sent only to those recipients listed in the *Assignments* pane (Figure 12-18).

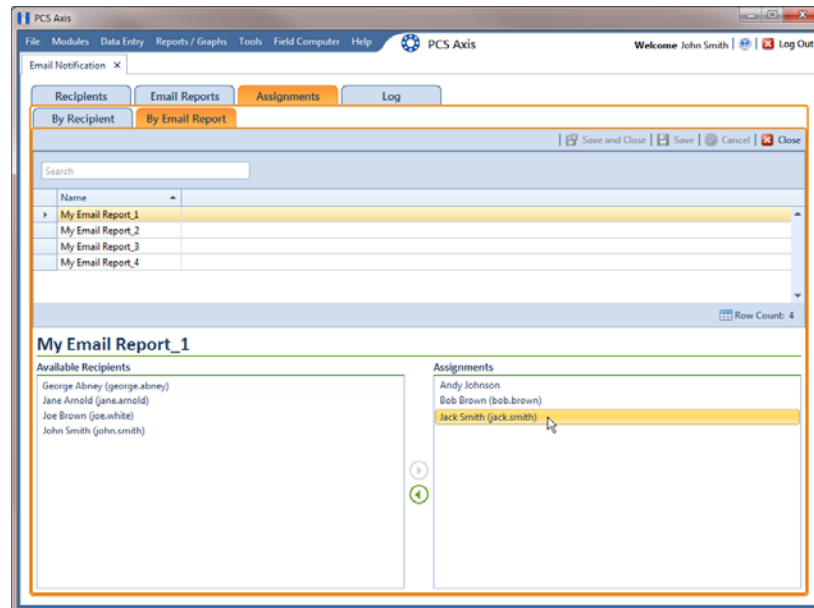


Figure 12-18. Email Notification Assignments By Email Report