

## Setting up WinPQ automated email reports

3/2/2010

Two main steps are required for WinPQ (server) to be able to generate automatic email/printouts

1. Set up email address and details on network mail server (PQMail)
2. Set up PQRvReport (program that scans WinPQ MySQL database for new PQ data, generating PDF reports for printing and for email via PQMail)

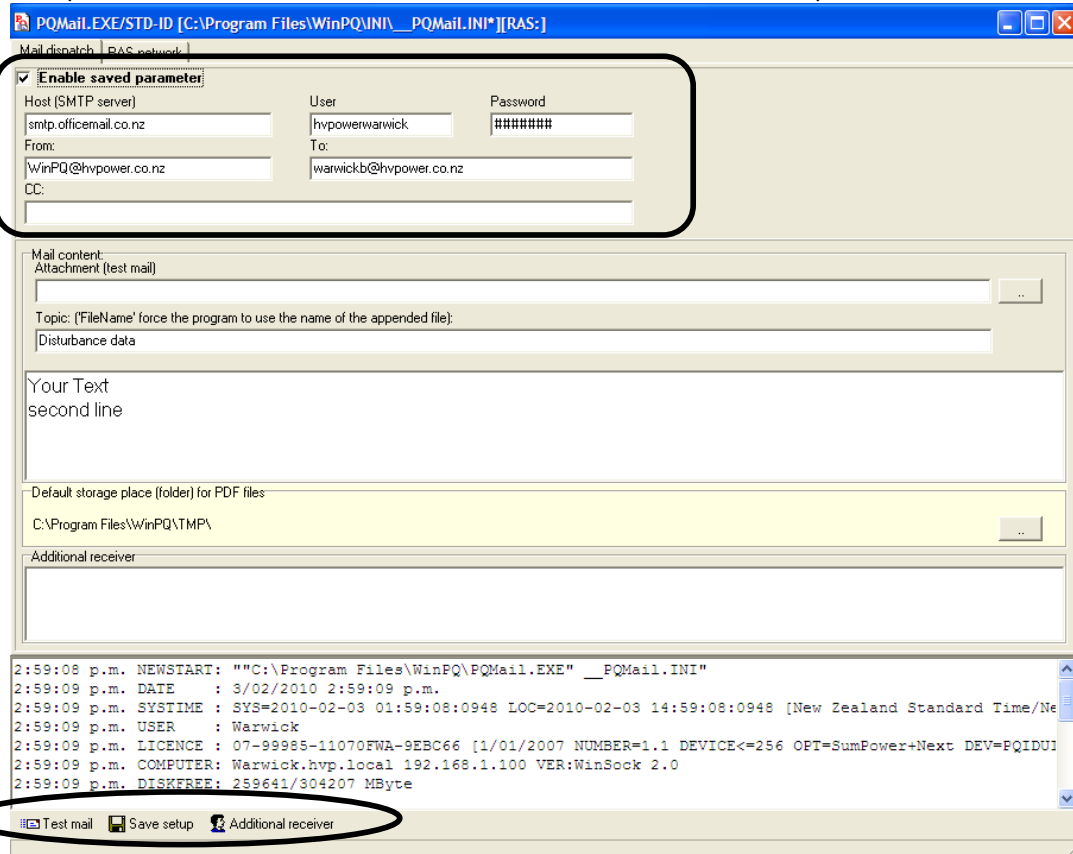
*Note that current versions of WinPQ have an inbuilt PDF writer. Unlike earlier versions of WinPQ, an external PDF writer (such as PDFCreator) does not need to be installed.*

Note that similar setup can also be completed on Client copies of WinPQ, but alert emails need to be set up for each station icon. However, setup of such functions on Client is not generally recommended as Clients do not normally operate 24/7.

### Setup PQMail

The following describes the method of setting up parameters using the GUI. However, it is simpler in some respects to set some of the parameters via editing the PQMail.ini file (discussed later).

- 1 Set up PQMail to use a mail server connectable from WinPQ server computer.



Set up SMTP details and save.

Selecting "Enabled Saved Parameters" permits access to User and Password fields, these being the Username and Password if required for the network mail server.

The RAS tab is for setup of dialup email accounts via modem.

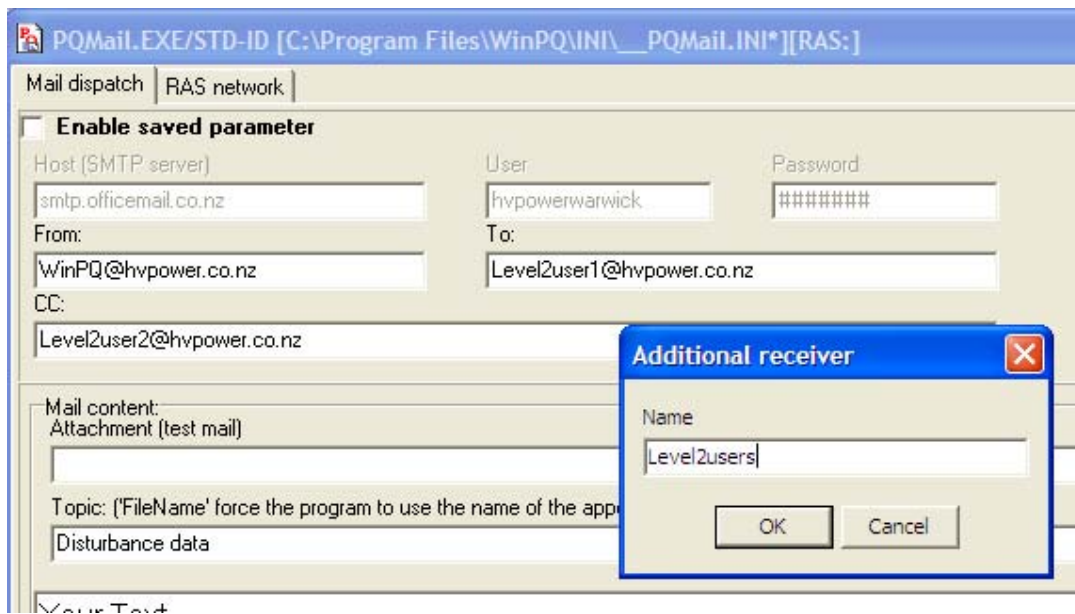
The Test mail button can be used to send test email to the "To" and "CC" users. The "File attached" can be used to attach test data to the test email. Note that with testing, if the same email address is used twice or more (i.e. for To and CC, only one email will be sent).

The folder for PDF files must be the same folder as will be setup with PQRvReports.

**2 Explanation of the "Additional Receiver" Button:**

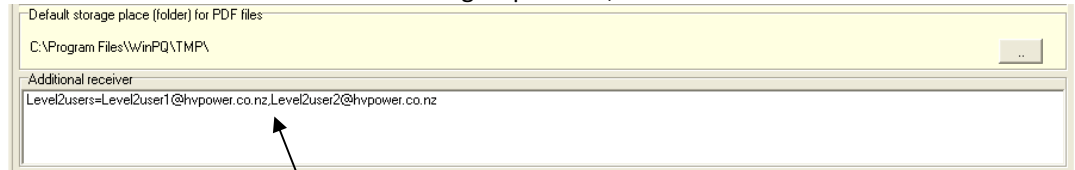
*Firstly note that it is possible to set up multiple emails within the "To" and "CC" fields. Simply separate the different email addresses with a comma (","). E.g. looking at PQMail.ini, the "To" line would be To=User1@hvpower.co.nz,User2@hvpower.co.nz*

PQMail is initially setup to email the main indicated report user (in Item 1 above [warwickb@hvpower.co.nz](mailto:warwickb@hvpower.co.nz) is given as example, with no CC names. The Additional Receiver button allows multiple GROUPS of additional users to be setup, to send selected reports/alerts (via PQRvReports).



First overwrite the To and CC names with new names of users for the second group. Then press the "Additional Receiver" button. A dialogue box opens where "additional receiver name" is requested. The "Group name" should then be entered (such as "Secondary users", "Level2\_reports", etc). Selecting OK then copies the current shown To and CC names into the new Additional receiver user group.

Do not use "DEFAULT" or "STATION" for group names, as these are reserved.



Additional receiver groups and names

3 Note that from this point it is actually easier to use Notepad or similar (or PQAdmin tab INU setup) and edit the PQMail.ini file and add the details required for Groups.

```
[MAIL]
SMTP=smtp.officemail.co.nz
From=WinPQ@hvpower.co.nz
To=Mainuser@hvpower.co.nz
CC=
SUBJECT=WinPQ Automated Report
CONTENT=Please do not reply to this automated message
USER=mailserverusername
PASS=mailserverpassword
```

Recipient email addresses, separated by ,

Group Name

```
[MAILTO]
Level2users=Level2user1@hvpower.co.nz,Level2user2@hvpower.co.nz
Level3users=Level3user1@hvpower.co.nz,Level3user2@hvpower.co.nz
```

**Main PQMail.ini settings:**

[PROGRAM]	
LOGFILE=1	1 = create log file of operation 0 = do not create log file
AUTOCLOSE=0	1 = autoclose program after sending email 0 = do not close program after operation
WINDOWSTATE=1	Window state when running 0 = task bar 1 = normal 2 = maximised
TRAYICON=1	Does program have icon in system tray?
IGNOREERR=1	

[MAIL]	
SMTP=smtp.officemail.co.nz	SMTP address of email account being used
From=WinPQ@hvpower.co.nz	Email address of sender (email provider may need valid email address for authentication)
To=1stuser@hvpower.co.nz	First recipient email . Additional users separated by "," (Referred to in PQRvreport as "DEFAULT" user)
CC=2nduser@hvpower.co.nz	CC' email recipient if required (Referred to in PQRvreport as "STATION" user)
SUBJECT=WinPQ Disturbance data - Automated data, please do not reply	Email subject text
CONTENT=Attached is automated data from Win PQ;; This is data is sent from automated source, please do not reply	Email body text. ";" is used as linefeed
USER=WinPQ@hvpower.co.nz	Valid for email server. Needed if email provider requires authentication
PASS=xyz123	Password for authentication

[MAILTO]	
Level2users=Level2User1@hvpower.co.nz,Level2User2	Additional email Group "Level2users" if

@hvpower.co.nz	needed
Level3users=Level3User1@hvpower.co.nz,Level3User2@hvpower.co.nz	Additional email Group "Level3users" if needed
Many groups can be created, with multiple email addresses (separated by ,)	

## Setting up PQRvReport

**Overview:** PQRvReport program continuously scans the SQL database for new records. If setup, upon a new disturbance event being stored to the database, a new PDF report will be emailed and/or printed. Additionally, PQRvReport can also be used to generate timed statistical reports (weekly, daily, monthly, yearly).

On the server, PQRvReport should run permanently to scan the database for new data to generate a disturbance event report, or to send a timed report. It is recommended to include the PQRvReport program in the Start-up folder of the server (it is not a service). Additionally, schedule this as a task to start a few minutes after midnight (CLOSEENDOFDAY=2 setting should be used to automatically close program each day 2 minutes prior to midnight).

If an event should occur while PQRvReport is not running, PQRvReport will action this when next started.

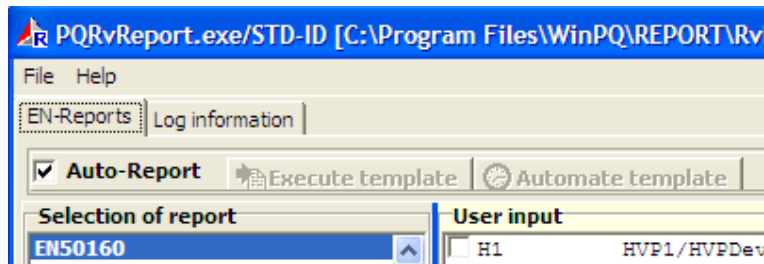
### Client Reports

PQRvReport is also supplied with Client installs, and can be used to generate reports as required (on demand), or automatically. For Automated Reports, PQRvReport should be run continuously. Access to "EN Report" via the station icon can be hidden if desired.

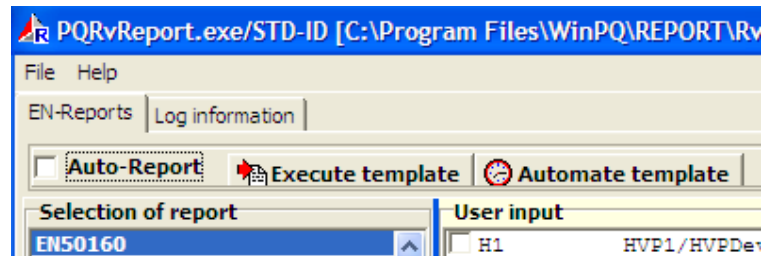
PQRvReport.exe is accessible via:

- Windows start menu
- Navigating to WinPQ installation directory
- Station icon as "EN Reports" function

When starting PQRvReport, the program may briefly show its main window, then minimise to the lower task bar (right-click taskbar item and select "show program"). To close, you may need to right-click on the task bar item.



*Auto report enabled, stops access to manual execution of templates and setups*



*Stopping Auto reports, enables access to manual execution or setup of automated templates*

- Auto Report** Uncheck “Auto-Report” to stop automated monitoring. Automated monitoring must be stopped to allow setup changes to be made and to allow manual reports to be run. After a period of time, Automated Reports will automatically be reselected and started.
- Execute Template** Permits reports to be run on demand
- Automate Template** For setting up of automated reports (check "Auto report" box)

When operating PQRvReport for the first time, use the File command and ensure:

- “Load Report” has RvDeafult\_eng.rav selected (selects default English reports)
- “SQL Standard Connection” has selected the appropriate database to be monitored (normally PQVISU) (Sichern = Select, Abbruch = Abort)
- PDF folder is WinPQ\TMP

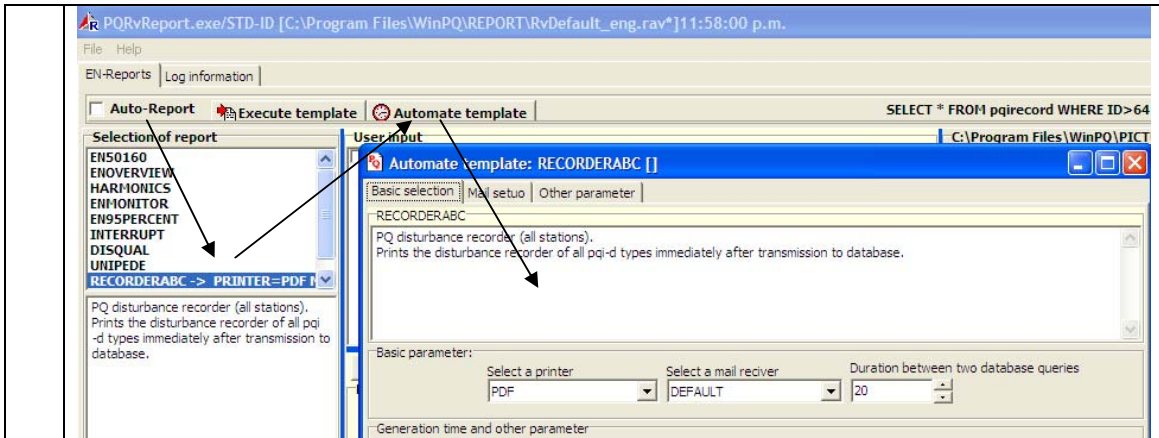
Note the program PQRvReport does add a record of the most current report generated to each report type [xxxx] in PQRvReport.ini. Thus when the program is restarted, it knows what was last printed, so as not to reprint/resend old reports. If you alter the .INI directly and delete this information, you may generate reports/emails for all old events. This is useful when testing, as you can shut down PQRvReport, and change one of the indexes back to cause a report to be reprinted when restarting PQRvReport. (Note that normally PQRvReport is set with Timer=60 (seconds), for checking if new reports need to be issued – if there are several reports to be printed, they will occur, but only one per minute.)

**Example PQRvReport.ini contents:**

```
[RECORDERABC]
.....
PQVISU=10      [Counter showS that the first 10 event records have been printed]

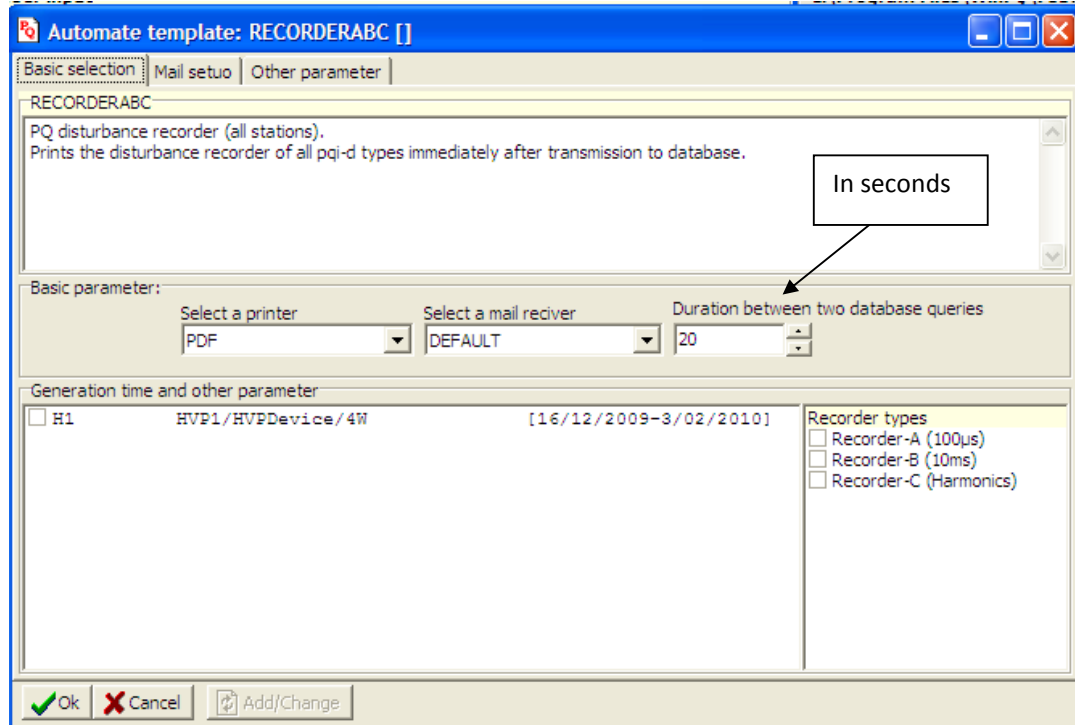
HVP=12/12/2008 4:15:12 p.m.    [Showing date/time of last printout for statistical report]
```

1	Example setup of RECORDERABC report so report is issued each time a new disturbance record is captured by PQ device and downloaded to SQL database.
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Deselect "Auto report", select "RECORDERABC", then click on "Automate template" to open template window.

- 2 To send report to the printer only, choose printer in "Select printer" selection box.



However, if reports are to be emailed, then the Printer selection must be "PDF" (this prints reports to PDF files so they can be emailed). See later instructions, where the "Other" tab can be used to also send a copy of the report to the local default printer.

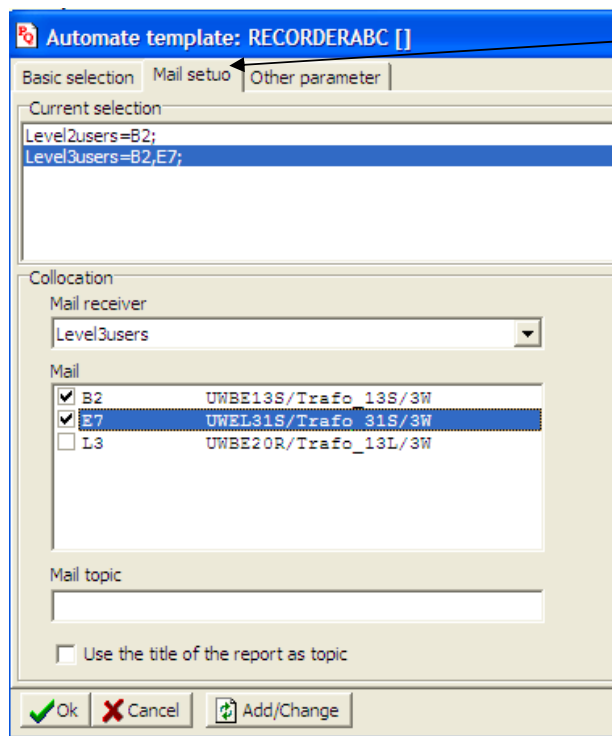
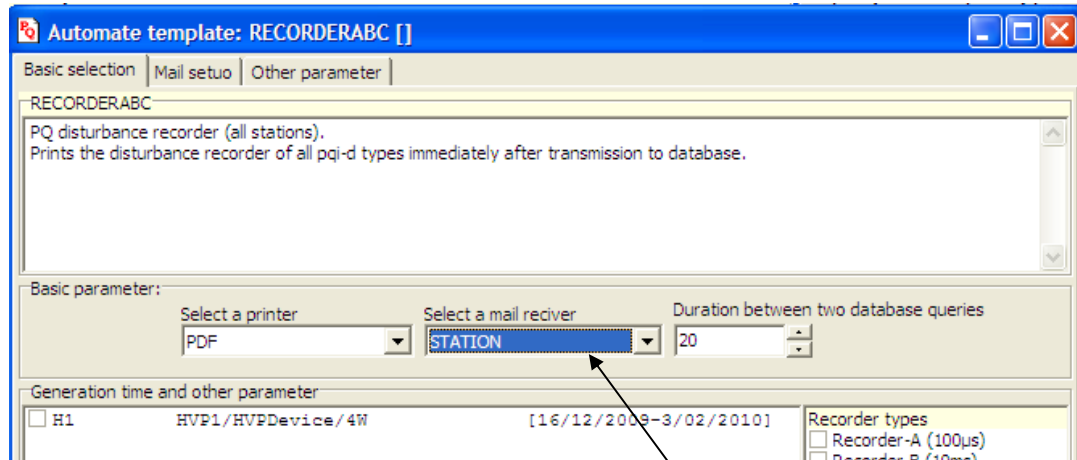
To email report, select mail recipients:

- DEFAULT = To and CC users set up in PQMail
- STATION = Enables the "Mail Setup" tab to be used to send specific station reports to specific groups - see later description
- XXXXXX = Other choices will appear if additional user defined groups have been set up in PQMail

Note, if no selection is made in the "Selection of station", or "Recorder" check boxes, this means all options are selected. If preferred, all boxes may be manually selected.

3 As described in Setup PQMail, additional email recipients can be setup in user defined groups. If the group name is selected in the "Report Setup", "Select mail recipient" menu, then reports from all stations will be sent to the users in the selected group.

If however, "STATION" is selected via the "Report Setup", "Select mail recipient" menu, then the "Mail setup" tab can be used to send report for specific stations to the user defined groups.



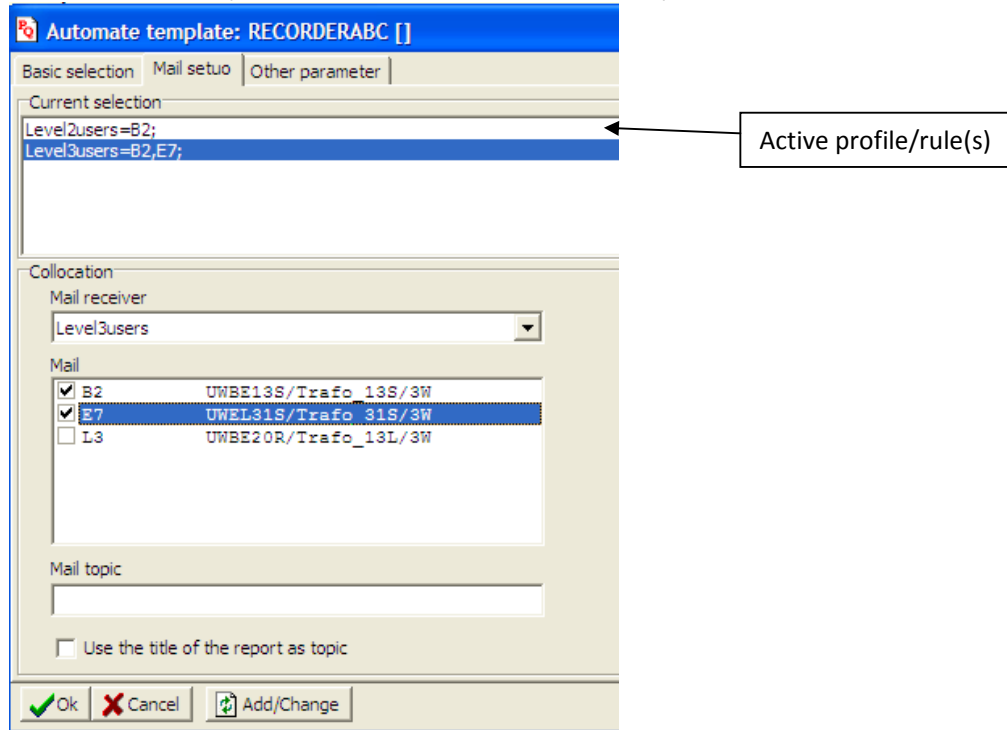
The settings within the "Mail setup" tab only take effect when "STATION" is selected as the mail recipient in the Report setup tab.

4 A profile/rule is only set up if it appears in the "Available items" list.

To add a profile/rule, use the controls in "Preselecting of parameter" area to select the group and stations. Click "Add/Change" to add to active profiles.

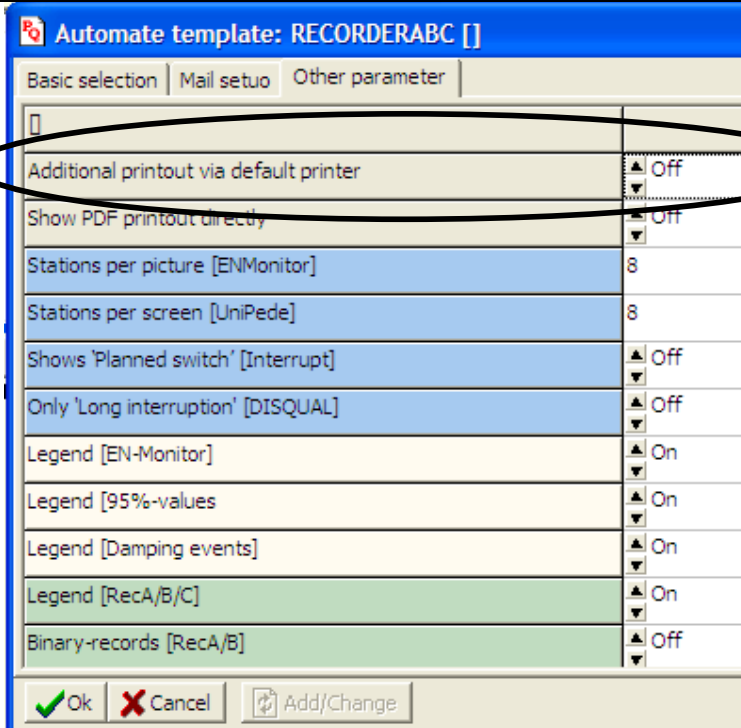
To change the profile for a recipient, reselect them in the " Preselecting of parameter" area, select the new station information and then click "Add/Change" to update the active profile.

To delete an active profile/rule, double click on it in the top area.



The "Topic-line-text" can be used to add custom text to the email subject (rather than the default report title). Not that if "Title of disturbance-report is checked, this will cause all email subject lines to revert back to default report subject titles, regardless of "Topic-line-text" settings.

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You may need to right click and select on/off to change these values, rather than using up/down spin knobs.

By selecting "Additional printout", a printout will also be sent to the default printer of the host (Server) computer.

Note the default printer is set via PQ-Start main menu (PQStart.ini).