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Knowledge Base Article

Product Group: Software
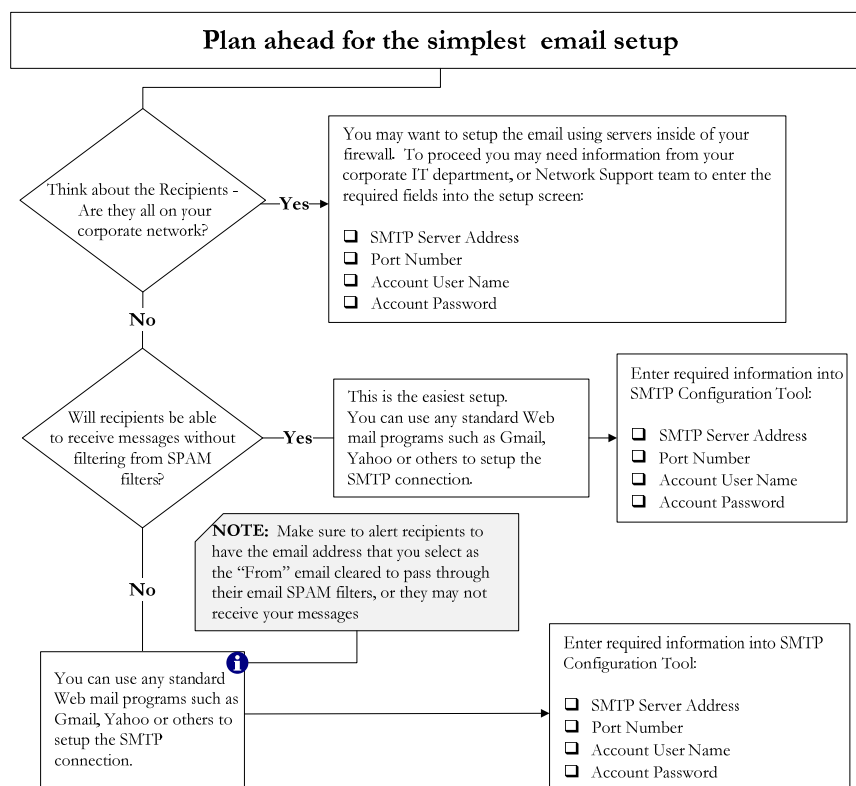**Product:** CMSW7400 – @ptitude Analyst
Version: 7.0 (2012 Edition)

Abstract

To utilize SKF @ptitude Analyst capabilities to send e-mail and SMS text message notifications, the software must first be configured to enable access to a working server that can forward and deliver these notifications through standard internet protocols. This configuration is done through use of the SKF @ptitude Analyst Configuration Tool as well as the SKF @ptitude Analyst application.

Overview

➢ Before starting this procedure, plan on how to set up the email so that you can be sure that your recipients can receive the messages that are sent. See planning diagram in Figure 1.1:

Plan ahead for the simplest email setup

Think about the Recipients - Are they all on your corporate network?

Yes → You may want to setup the email using servers inside of your firewall. To proceed you may need information from your corporate IT department, or Network Support team to enter the required fields into the setup screen:

❑ SMTP Server Address
❑ Port Number
❑ Account User Name
❑ Account Password

No

Will recipients be able to receive messages without filtering from SPAM filters?

Yes → This is the easiest setup.
You can use any standard Web mail programs such as Gmail, Yahoo or others to setup the SMTP connection.

→ Enter required information into SMTP Configuration Tool:

❑ SMTP Server Address
❑ Port Number
❑ Account User Name
❑ Account Password

NOTE: Make sure to alert recipients to have the email address that you select as the "From" email cleared to pass through their email SPAM filters, or they may not receive your messages

No

ⓘ

You can use any standard Web mail programs such as Gmail, Yahoo or others to setup the SMTP connection.

Enter required information into SMTP Configuration Tool:

❑ SMTP Server Address
❑ Port Number
❑ Account User Name
❑ Account Password

Figure 1.1. Planning diagram

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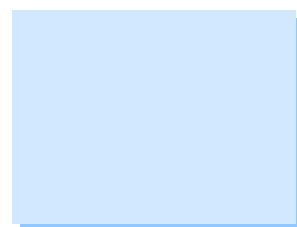
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Prerequisites

Setting up e-mail and SMS text message notifications to work in SKF @ptitude Analyst requires that several prerequisite capabilities be provided outside the SKF application. Figure 1.2 helps illustrate the relationship of these complementary capabilities. The bullet list below also provides information about these prerequisites.
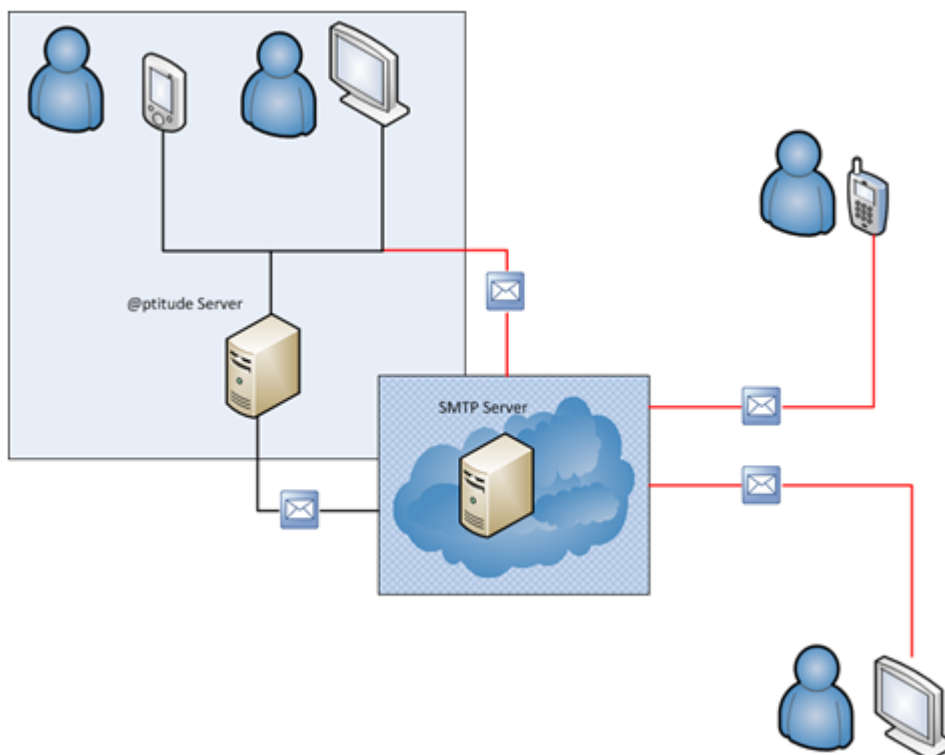
Figure 1.2. Prerequisite capabilities for SMTP setup

- **A working network (wired or wireless) that has been installed and correctly configured to support standard TCP/IP protocols.** Analyst sends e-mail requests over a network using standard protocols such as TCP/IP and SMTP. Microsoft Windows machines running Analyst must have a working wired or wireless network connection set up and enabled before attempting to configure e-mail support in Analyst.

- **Network connectivity between Analyst clients or services and SMTP server is available and not being blocked.** An authorized server that supports SMTP e-mail requests and is reachable through a network connection by the Analyst software must be identified before SMTP configuration can be completed. An accessible Internet connection may be required to reach a public external SMTP server located outside a private corporate network.

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- **Network connectivity between SMTP delivery servers and intended recipients of e-mail notifications is available and not being blocked.** Delivery of e-mail notifications from Analyst also depends on messages being able to reach recipients. Possible barriers to messages getting through include corporate firewalls and spam filters.

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SMTP Settings in SKF @ptitude Analyst Configuration Tool

SMTP stands for **S**imple **M**ail **T**ransport **P**rotocol. It is a standard protocol adopted by many organizations to allow e-mail messages to be delivered seamlessly across different networks with a minimum of potential complications due to application incompatibilities.

SMTP settings for @ptitude Analyst e-mail and text messaging are first configured in the **SKF @ptitude Analyst Configuration Tool**.

To access the configuration settings, follow the instructions below:

1. Go to **Start > Programs > SKF @ptitude Monitoring Suite > Admin Tools > SKF @ptitude Analyst Configuration Tool**.

2. Click on the **SMTP Settings** link in the left panel. [Figure 1.3]
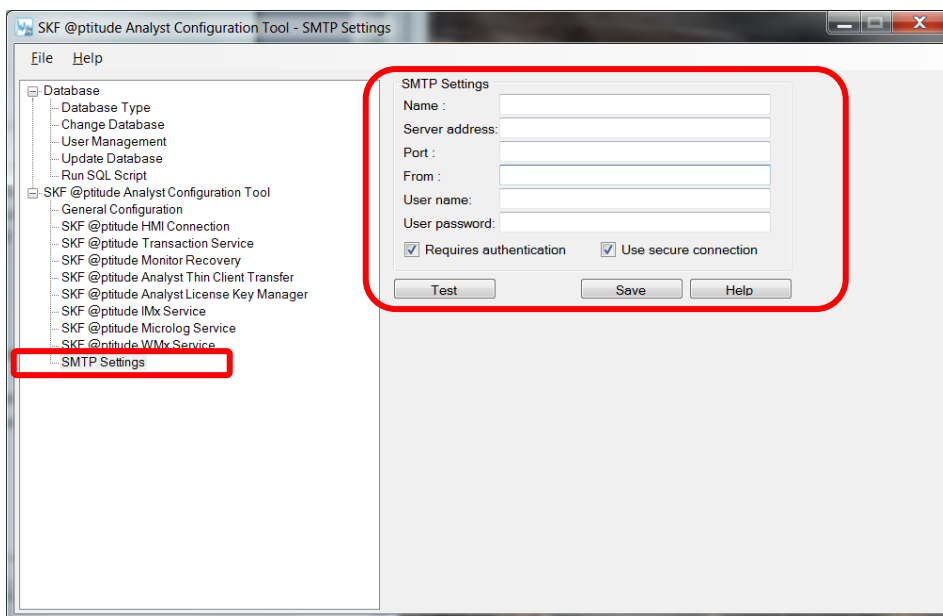
Figure 1.3. Configure SMTP Settings in the Configuration Tool

These fields must be completed according to the specific requirements of the server software that will be used to pass notifications to the intended recipients. These requirements are set by the operator of each particular server, and may vary from one service provider to another. It is important before configuring the @ptitude Analyst SMTP settings that the user obtains all recommended settings, likely provided by the desired service provider, for connecting to an SMTP service operated by that provider.

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Configuring the SMTP Settings with the SKF @ptitude Analyst Configuration Tool requires filling in several text input boxes and selecting appropriate choices concerning whether authentication and encryption support are needed. The purpose of each input setting is briefly described below. Public information sources or the local IT department may be consulted to determine the correct settings to apply in each particular environment being configured:

- **Name:** This text value will appear in some e-mail clients receiving messages from Analyst as the <u>name of the message sender</u>. The Configuration Tool requires that this field be filled in with a non-empty string value.

- **Server address:** This text value contains the network address of the SMTP server that Analyst should use to send e-mail messages. Depending on the environment where Analyst is being installed, this server may be either an internal location within an organization's private network, or a publicized public location for an external provider of e-mail service such as Google Gmail or Yahoo Mail. The address may be specified as either a domain name such as smtp.gmail.com, or as a valid IP address such as 74.125.137.109. The Configuration Tool requires that this field be filled in with a non-empty string value.

- **Port:** This numeric value contains the port number associated with enabling clients to access the SMTP server described above. The right port number to use depends on how an SMTP server has been set up by its owner, and will often be publicized for the benefit of authorized users. The Configuration Tool requires that this field be filled in with a non-empty numeric integer value.

- **From:** This text value contains an e-mail address that may appear in some e-mail clients as the <u>originating address</u> for messages that are sent from @ptitude Analyst. The Configuration Tool requires that this field be filled in with a non-empty string value.

- **User name:** This text value contains the user or login name part of the authentication credentials used by many SMTP service providers to ensure that their services are only being used by authorized users. This field is required to be filled in by the Configuration Tool only if the "Requires authentication" checkbox is enabled.

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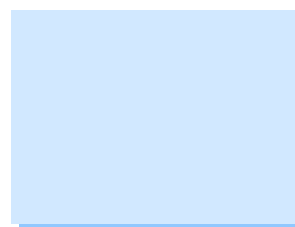
- **User password:** This text value contains the password part of the authentication credentials used by many SMTP service providers to ensure that their services are only being used by authorized users. This field is required to be filled in by the Configuration Tool only if the "Requires authentication" checkbox is enabled.

- **Requires authentication:** This box must be checked if the SMTP server requires that users provide credentials showing they are authorized to use the provided service. This authentication usually consists of a login name and password combination. When this box is checked, Analyst will provide the user name and password described above as credentials to the SMTP server for authentication purposes.

- **Use secure connection:** This box must be checked if the SMTP server uses standard encryption protocols to protect the security of sensitive information being passed over the network.

3. Click the **Test** button once complete. A dialog box will display asking for an e-mail address. Input the email address where the test notification will be sent to. Clicking this button will invoke a test routine that helps verify whether configuration values that have been entered into the form are actually valid and working. If the test fails, additional information about why the test failed will often be made available. Configuration settings should not be relied on to be correct and functional until after they have been successfully proven with the provided Test function.

4. A confirmation dialog will appear. Press **OK**. [Figure 1.4]
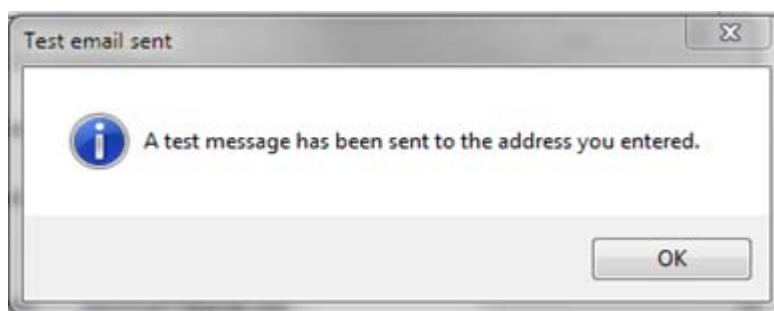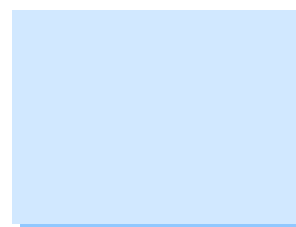
Figure 1.4. Test email sent

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5. Verify the test email was received at the email address provided in Step 3. [Figure 1.5]
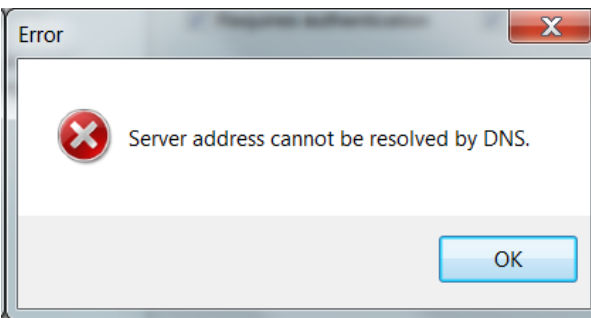

Figure 1.5. Test email received

6. Once it is confirmed that a test email has been received, proceed to the second section below which demonstrates how to configure @ptitude Analyst for email and text message notifications. Otherwise, see the section labeled **Troubleshooting** for more information on what may have gone wrong.
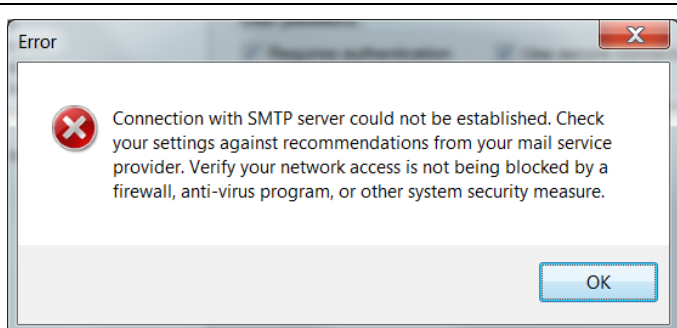
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Troubleshooting

Because there are a number of external factors and conditions that could have an influence on the success of setting up the SMTP configuration for @ptitude Analyst, a few potential problems are listed here along with some guidance on how to troubleshoot possible issues.

Basic Network Problems	
	Error Server address cannot be resolved by DNS. OK

If @ptitude Analyst is installed on a machine that has not been previously set up with a functional network connection, clicking on the **Test** button will usually show an error message indicating that the basic network function such as DNS lookup has failed. The figure here illustrates the error message this kind of problem brings up during a test trial.

If this error occurs, check to see if Windows networking has been enabled. If it is a wired network, check that a network cable is plugged into the machine. If it is a wireless network, check that an authorized wireless connection can be seen by the machine, that the wireless signal strength is sufficient to make a connection, and that the appropriate password has been entered if one is required to make a connection. Open a command window and type in the "ipconfig" command to verify that the machine has been assigned a valid IP address. If there are continuing problems in this area, contact local IT support for assistance.

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Problems accessing SMTP server	

If there is a problem with the SMTP **Server address** or **Port** number that was entered, the error message illustrated here will be displayed during a test trial.

If this error occurs, check that the correct SMTP server address and port number has been entered. If the server address and port number appear to be correct but the error persists, check to see if there is something blocking network access to the SMTP server. Some possible causes of blockage to look for include Windows firewall settings on the local machine, third-party anti-virus or security software running on the local machine, and corporate network or firewall policies that might block certain kinds of SMTP traffic.

Problems with authentication or establishing a secure connection	
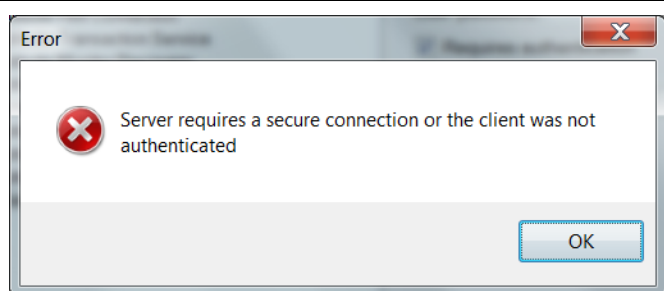
If there is a problem with the selected method of authentication or establishing a secure connection, the error message shown in Figure 1.6 will be displayed during a test trial.

If this error occurs, check whether the selected SMTP server requires that authentication credentials be presented and whether it supports using a securely encrypted method of connection. Select the appropriate supported method by checking the appropriate checkboxes.

If authentication is required to access the SMTP server, check that the user name and password that have been entered are correct for this server. If the service provider operating the server provides a website as a means for

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accessing e-mail, try logging into the website with the same user name and password. If a successful test connection cannot be established with the secure connection option set one way, try the other choice.

Problems with receiving test e-mail	

If the test function progresses without generating an explicit error message but fails to deliver the expected test e-mail message to the destination specified during the test, then there may be a problem preventing e-mail from being received. Check to see if a spam filter operated by an e-mail service provider or corporation may have blocked reception of the expected message. Preventing this blockage in the future may require that the source of the @ptitude Analyst-generated e-mail be added to a white-list that allows designated e-mail to pass through a spam filter.

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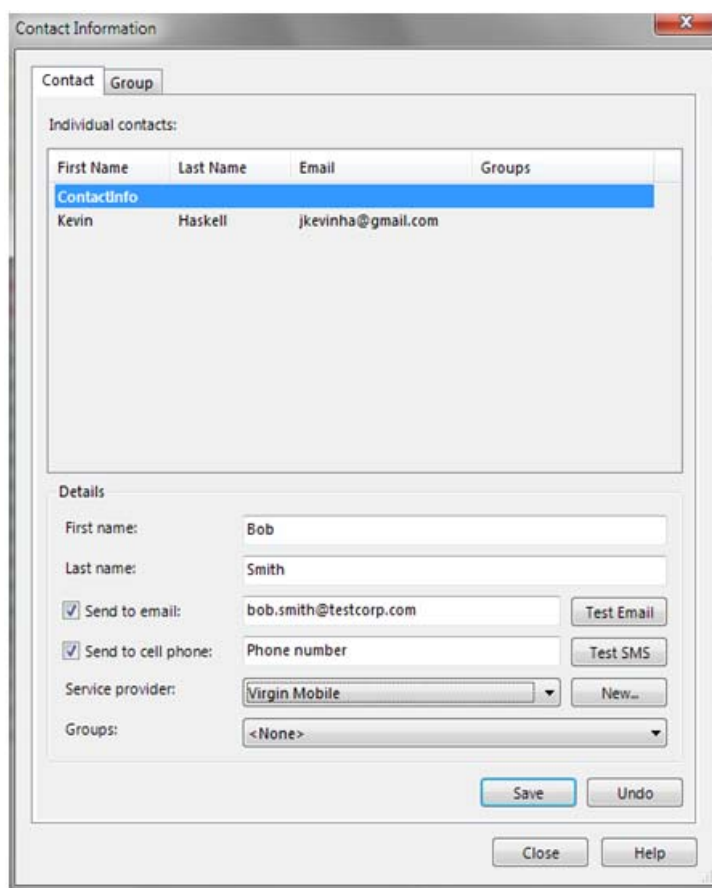
This section provides instructions pertaining to setting up recipients and assigned events which are configured from within SKF @ptitude Analyst.

1. Go to **Customize > Contact Information...** [Figure 2.1]
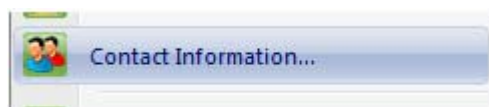
Figure 2.1. Customize > Contact Information...

2. The **Contact Information** dialog will display. Click **Add** and enter the recipient information. [Figure 2.2]

Figure 2.2. Contact Information

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➢ Check the box **Send to email** and enter the recipient email address to set up email notifications for this recipient.

➢ Check the box **Send to cell phone** and enter the recipient mobile phone number to set up text message notifications for this recipient. The phone service provider information may need to be entered if it does not appear in the **Service provider** drop down list. Press **New** to configure a new cell phone service provider:

   a. A **Cell Phone Service Provider** dialog will display. [Figure 2.3]

   b. Enter a **Provider Name**. This is a friendly name and may be any name desired.

   c. The **Gateway prefix** and **Gateway address** must be known. The following external link is helpful in finding most cell phone providers:

   http://en.wikipedia.org/wiki/List_of_SMS_gateways#cite_note-17

   d. After inputting the provider settings, press **OK**.
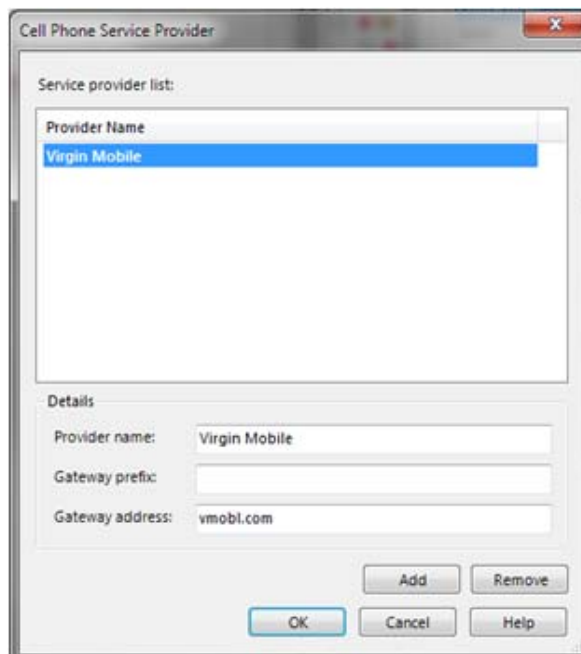
Figure 2.3. Cell Phone Service Provider

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3. The recipient is now ready to be assigned to an event. [Figure 2.4]
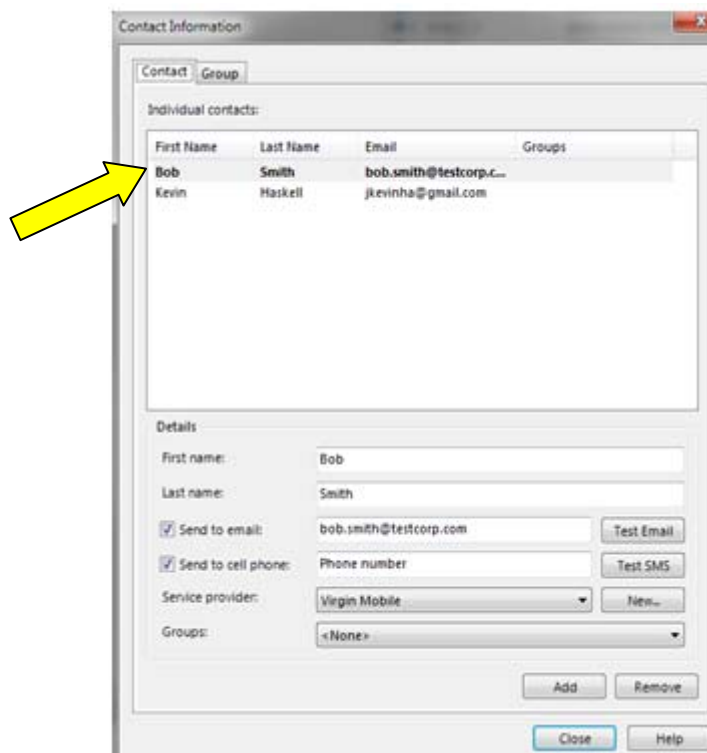
Figure 2.4. Individual contacts list

4. To set up an event now, go to **Customize > Scheduler...** [Figure 2.5]
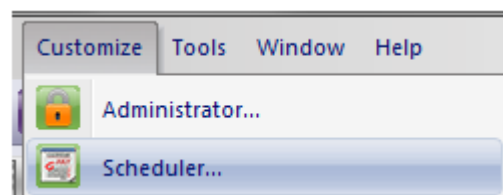
Figure 2.5. Customize > Scheduler...

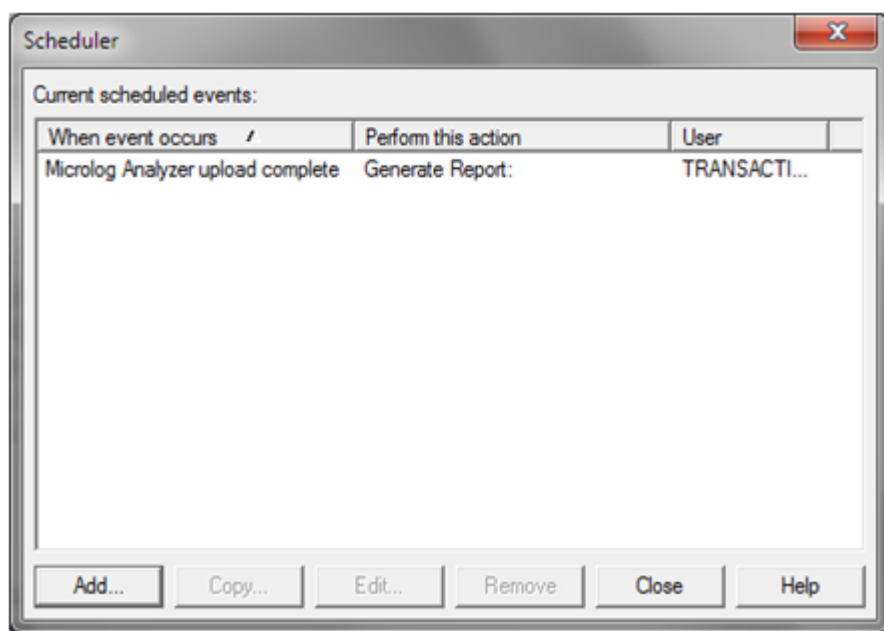5. The **Scheduler** wizard will display. [Figure 2.6]

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Figure 2.6. Scheduler wizard

6. Click **Add**. An informational screen will display. Click **Next**.

7. The **Event Scheduler** window will open. Select an event to configure notifications for. [Figure 2.7]
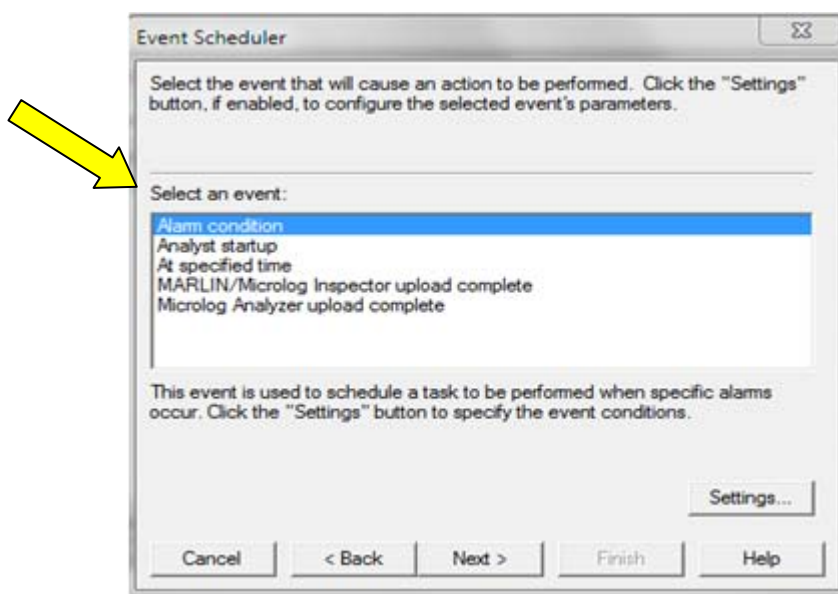
Figure 2.7. Select an event

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There are several events to choose from. The steps below will cover setting up an **Alarm condition** notification.

8. Select **Alarm condition**, and then click **Settings...**

9. The **Alarm Condition Settings** dialog will display. [Figure 2.8] Configure the alarm condition settings as desired.
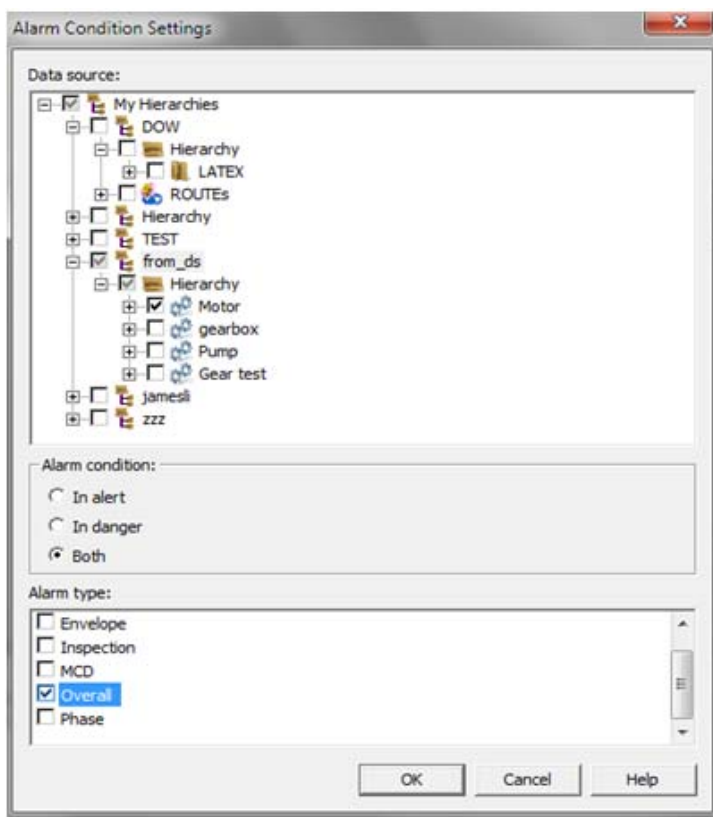
Figure 2.8. Alarm Condition Settings

Data source: Select the entire Hierarchy, Routes, Areas, Machines, and even individual POINTs.

Alarm condition: Select alert, danger, or both.

Alarm type: Select any alarm types that are set up in the database.

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10. Click **OK** after the selections are made, then click **Next >**. [Figure 2.9]
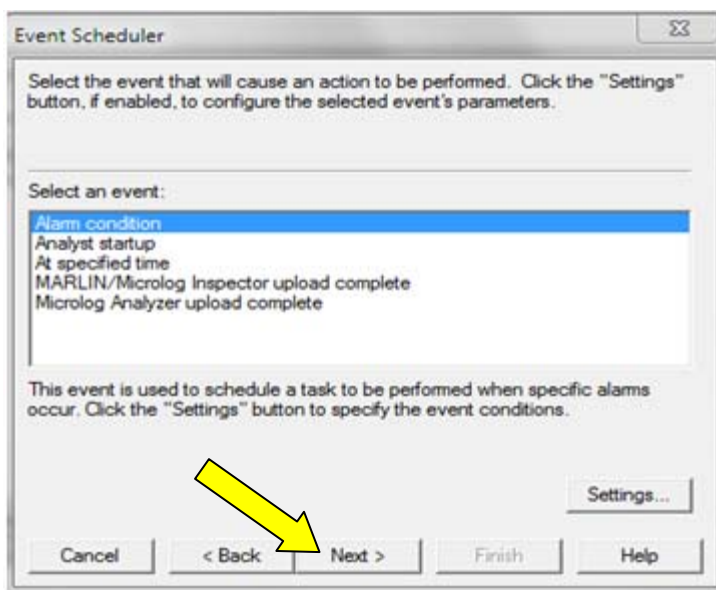
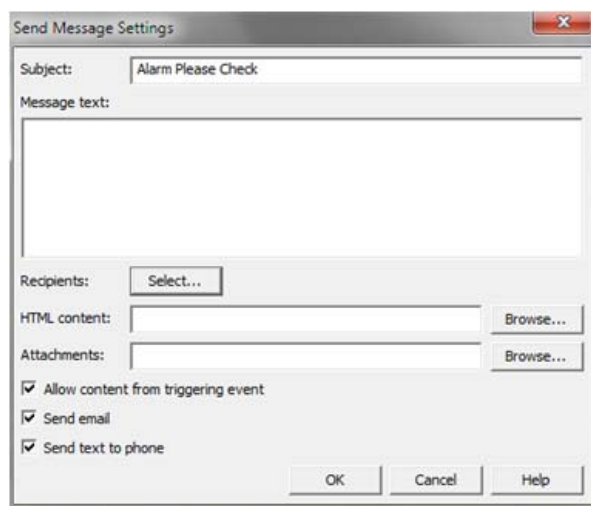**Figure 2.9**. Click Next > to proceed

11. Next, select an action. There are several actions to choose from. The steps below will cover the **Send message** action. [Figure 2.10]
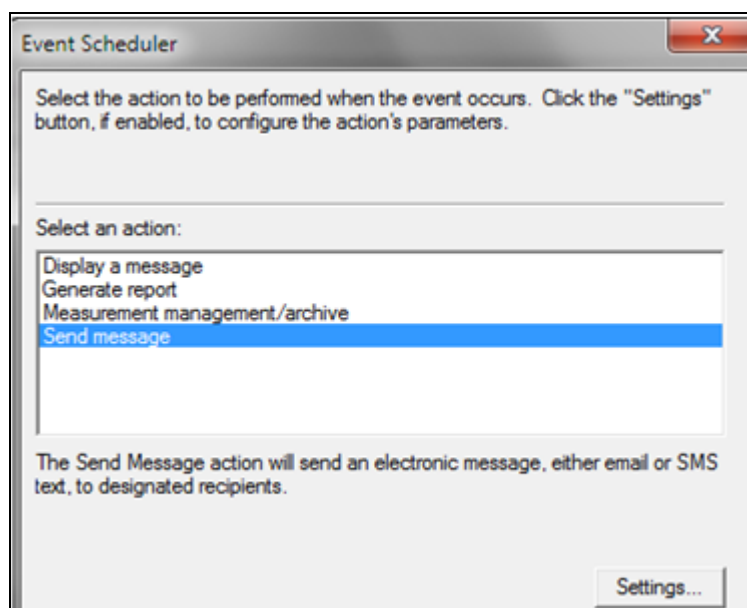
Figure 2.10. Select an action

12. Click **Settings...** and complete the fields in the **Send Message Settings** dialog. [Figure 2.11]
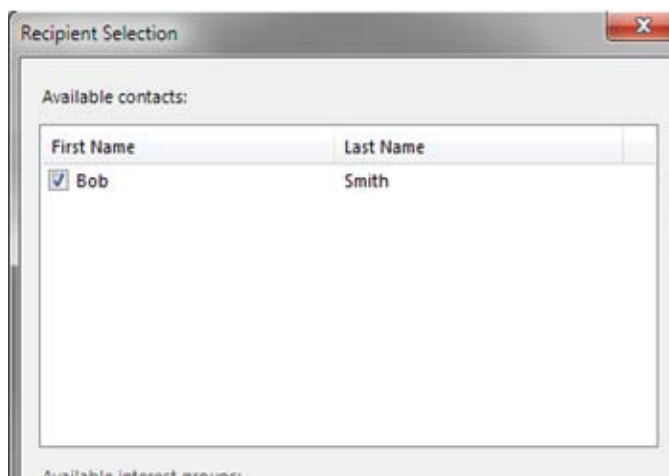

Figure 2.11. Send Message Settings

Subject: Enter a header for the email.

Message text: Enter any information that is to be included in the body of the email.

13. Click **Select...** to bring up the list of contacts that have been created. Place a check mark next to the desired recipient(s) [Figure 2.12], then click **OK**.

Figure 2.12. Recipient Selection

14. Now, select the user to whom this event will be assigned. The event may be assigned to a specific user or else delegated to the Transaction Server service. [Figure 2.13]
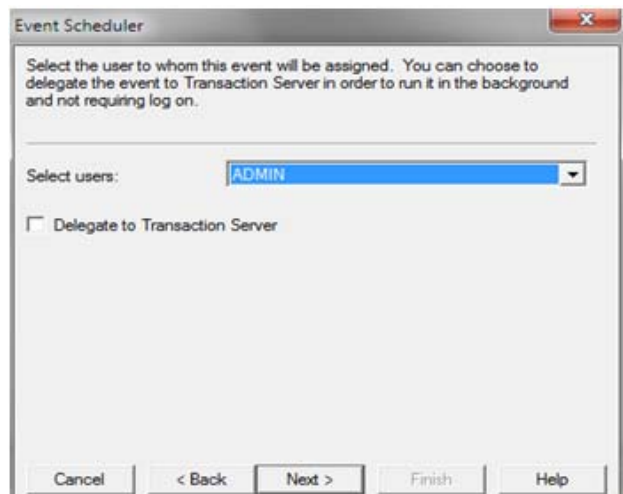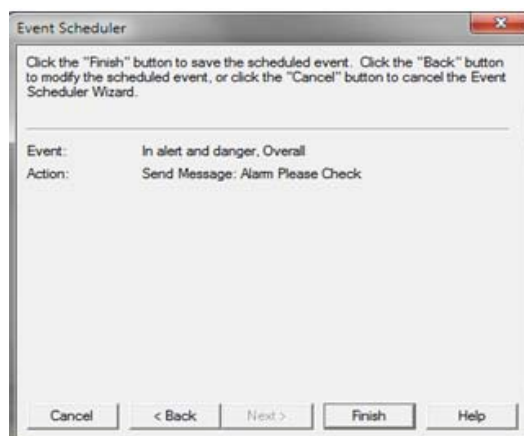

Figure 2.13. Select users

Note: If an event is assigned to a user, that particular user <u>must be logged in</u> to @ptitude Analyst in order for the event to trigger.
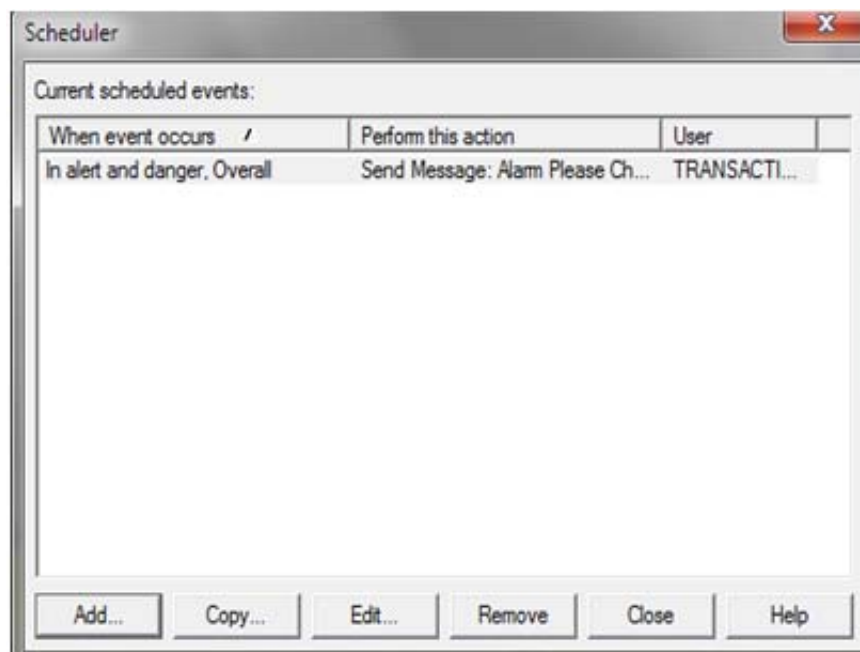
If the event is deleted to the Transaction Server, as long as the service is running, the event will be triggered.

15. Click **Next >** to review the details in the dialog, and then click **Finish**. [Figure 2.14]

Figure 2.14. Review screen

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16. The event is now scheduled. [Figure 2.15]

Figure 2.15. Current scheduled events

For further assistance, please contact the Technical Support Group by phone at 1-800-523-7514 option 8, or by email at TSG-CMC@skf.com.