

C-Series and DDM

Configuring emails

C-Series Email Notifications

These emails are triggered based upon the Data Role functions assigned to users i.e. accounts allocated as approve will receive 'ready to approve' emails and accounts allocated as submit will receive 'ready to submit' emails. Files which are rejected generate emails to the approver.

The Web system Notification configuration table contains the email standards for distribution as shown below:

CO.	DATATYPE	PRIORSTATUS	STATUS	E	MESSAGEID	MESSAGEIDONE	AUDIT	DESCRIPTION	ACTIONMODE	NEWNAME	APPLY	NOTIFICATION	
1	1	NI094CS	IP	EN	N	is ready for Approval	has been Loaded/Inp...	U IP EN	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
2	2	NI094CS	IP	RJ	N	has failed being Loaded/Inp...	has failed being Load...	U IP RJ	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
3	3	NI094CS	EN	IA	N	is ready for Approval	has been Approved	U EN IA	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
4	4	NI094CS	IA	AP	N	is ready for Submission	has been Approved	U IA AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
5	5	NI094CS	EN	AP	N	is ready for Approval	has been Approved	U EN AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
6	6	UI094CS	IP	EN	N	is ready for Approval	has been Loaded/Inp...	U IP EN	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
7	7	UI094CS	IP	RJ	N	has failed being Loaded/Inp...	has failed being Load...	U IP RJ	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
8	8	UI094CS	EN	IA	N	is ready for Approval	has been Approved	U EN IA	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
9	9	UI094CS	EN	AP	N	is ready for Submission	has been Approved	U EN AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
10	10	UI094CS	EN	AP	N	is ready for Submission	has been Approved	U EN AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
11	11	BE094CS	IP	EN	N	is ready for Approval	has been Loaded/Inp...	U IP EN	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
12	12	BE094CS	IP	RJ	N	has failed being Loaded/Inp...	has failed being Load...	U IP RJ	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
13	13	BE094CS	EN	IA	N	is ready for Approval	has been Approved	U EN IA	Send e-mail to Input/Approval Group for status change	APPROVE	USADH_PSRM	1	1
14	14	BE094CS	EN	AP	N	is ready for Submission	has been Approved	U EN AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
15	15	BE094CS	EN	AP	N	is ready for Submission	has been Approved	U EN AP	Send e-mail to Submission Group for status change	SUBMIT	USADH_PSRM	1	1
16	16	NI094CS	AP	SB	N	is being Submitted	is being Submitted	U IP EN	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1
17	17	NI094CS	SB	RL	N	has been Successfully Subm...	has been Successfully ...	U SB RL	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
18	18	NI094CS	SB	RB	N	has been Rejected by Race	has been Rejected by ...	U SB RB	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
19	19	NI094CS	AP	RL	N	has been Successfully Subm...	has been Successfully ...	U AP RL	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1
20	20	UI094CS	AP	SB	N	is being Submitted	is being Submitted	U IP EN	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1
21	21	UI094CS	SB	RL	N	has been Successfully Subm...	has been Successfully ...	U SB RL	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
22	22	UI094CS	SB	RB	N	has been Rejected by Race	has been Rejected by ...	U SB RB	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
23	23	UI094CS	AP	RL	N	has been Successfully Subm...	has been Successfully ...	U AP RL	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1
24	24	BE094CS	AP	SB	N	is being Submitted	is being Submitted	U IP EN	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1
25	25	BE094CS	SB	RL	N	has been Successfully Subm...	has been Successfully ...	U SB RL	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
26	26	BE094CS	SB	RB	N	has been Rejected by Race	has been Rejected by ...	U SB RB	Send e-mail to Submission Group for status change S	SUBMIT	USADH_PSRM	1	1
27	27	BE094CS	AP	RL	N	has been Successfully Subm...	has been Successfully ...	U AP RL	Send e-mail to Submission Group for status change A	SUBMIT	USADH_PSRM	1	1

There are three groups relating to application setup and emails are controlled accordingly:

- Non-Bureau
- Bureau
- User Bureau

Non required emails can be switched off by changing the apply field to '0'.

NOTE: For a Non-Bureau installation without HSM only lines 1-5 need to be activated (ie set apply to '1'); this will generate emails to the approver group (for imported and rejected files) and to the submitter group (for approved files).

Setting up Email

- 1. Ensure SMTP mail server is configured to allow unauthenticated emails from the CSeries server on Port 25 over SMTP
- 2. Enter the SMTP server IP address during the CSeries installation process when prompted. Alternatively manually update this in the table 'WEBSYSTEM.PARAMETERS'
- 3. Via the CSeries admin site, schedule Email notification functionality as follows

Select System Maintenance
Hub Administration
Events
Modify
Select 'Email Alerts Extract' > Tick Scheduled >

Set as follows

Events

Information	
Event ID:	1
Name:	Email alerts extract
Type:	WinJDMP
Schedule	
Schedule:	<input checked="" type="checkbox"/>
Parameters:	JCODE=EMAIL ECODE=EMAIL
Time Begin:	00 : 01
Time End:	23 : 59
Last Time Ran:	2011-07-29 16:14:58.0
Last Time Ran Successful:	2011-07-29 16:15:02.0
Last Return Code:	0
Sun:	<input type="checkbox"/>
Mon:	<input checked="" type="checkbox"/>
Tue:	<input checked="" type="checkbox"/>
Wed:	<input checked="" type="checkbox"/>
Thu:	<input checked="" type="checkbox"/>
Fri:	<input checked="" type="checkbox"/>
Sat:	<input type="checkbox"/>
Processing Mode	
Execute Once:	<input type="radio"/>
Event Manager Interval:	<input checked="" type="radio"/> Interval Time: 5
Event Interval:	<input type="radio"/>
File Polling:	<input type="radio"/> Input/Output Code: ...
Notification	
Server:	WSHUB
Email Recipient:	...
Email Subject:	
Send Email on Failure:	<input type="checkbox"/>
Send Email on Success:	<input type="checkbox"/>
Holiday Code:	...

Update **Reset** **Back**

5 Minute interval might be too long – reduce if needed
UPDATE

4. Via the Paybase admin , schedule the Notify event as follows

Select System Maintenance
Hub Administration
Events
Modify
Select 'Notify' > Tick Scheduled >

Events

Information	
Event ID:	119
Name:	NOTIFY
Type:	WinJDMP
Schedule	
Schedule:	<input checked="" type="checkbox"/>
Parameters:	JCODE=NOTIFY HOSTAP=NOTIFY ECODE=NOTIFY
Time Begin:	00:01
Time End:	23:59
Last Time Ran:	2011-07-29 16:22:04.0
Last Time Ran Successful:	2011-07-29 16:22:08.0
Last Return Code:	0
Sun:	<input type="checkbox"/>
Mon:	<input checked="" type="checkbox"/>
Tue:	<input checked="" type="checkbox"/>
Wed:	<input checked="" type="checkbox"/>
Thu:	<input checked="" type="checkbox"/>
Fri:	<input checked="" type="checkbox"/>
Sat:	<input type="checkbox"/>
Processing Mode	
Execute Once:	<input type="radio"/>
Event Manager Interval:	<input checked="" type="radio"/> Interval Time: 1
Event Interval:	<input type="radio"/>
File Polling:	<input type="radio"/> Input/Output Code: NOTIFY_IN
Notification	
Server:	WSHUB
Email Recipient:	
Email Subject:	
Send Email on Failure:	<input type="checkbox"/>
Send Email on Success:	<input type="checkbox"/>
Holiday Code:	
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Back"/>	

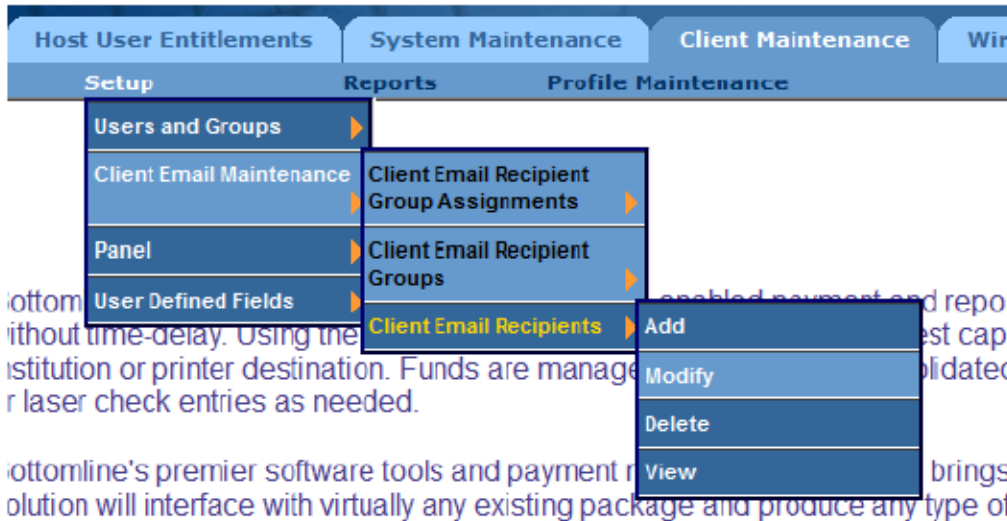
Update

5. Set Email addresses for each user created

Client Maint >Setup> Users and Groups > Client User -

NOTE: Make sure you approve changes

6. Set the Email from address as follows



Amend the 'from' address for the _DEFAULT group - Note the "name" cannot be changed.

The screenshot shows the 'Client Email Recipients' configuration form with the following fields and buttons:

- User Group:
- Name:
- Email Address:
- Buttons: Update, Reset, Back

NOTE: Should you have problems amending the above, edit the Websystem.EMAILADDRESSES table within SQL.

7. Restart the event manager

Monitor the WEBSYSTEM.EMAILMESSAGE table

Where sent email status is RL.... Recipient should show all approvers to receive. If any recipients are missing data roles (app/sub).

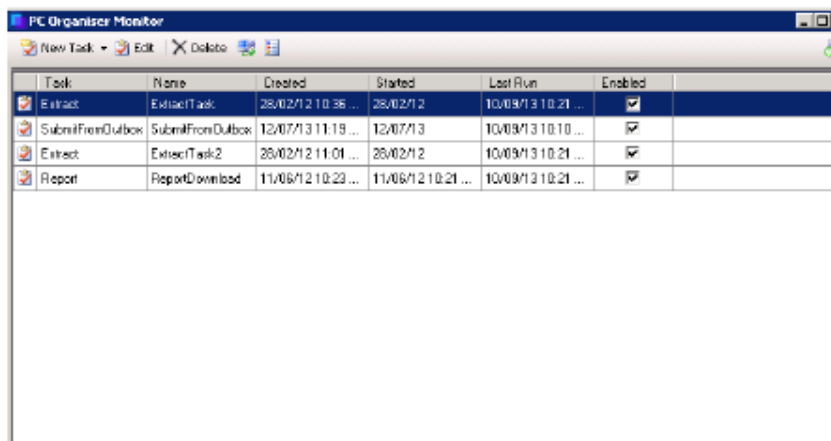
Notify Event - looks for files requiring action and sends email to approvers/submitters

DDM Email Notifications

Background

The PayCentre Organiser (PCO) runs automated tasks at user given intervals. They can be set up to run the following tasks:-

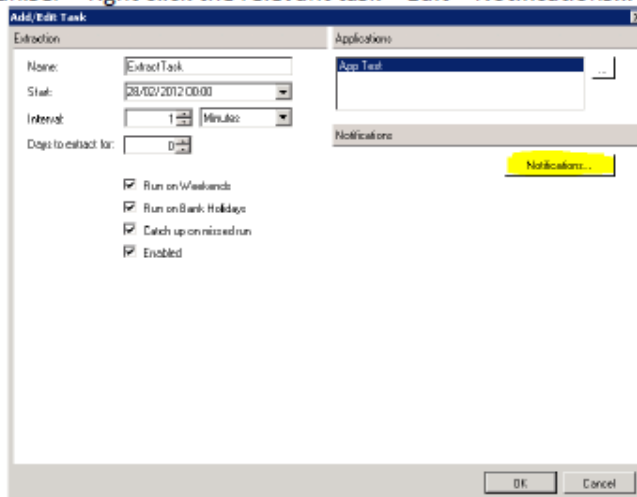
- Extract – Extracts any forthcoming payments from a user given time period in advance (days) and place them in the Bank Transactions: Outbox ready for authorising.
- Submit From Outbox – Pushes all authorised payments from the Bank Transactions: Outbox to the Payments tab, creating a tile to be submitted to BACS.
- Report – Automates BACS reports from a given path directory and applies them against the system to update payers and payment plans status.



Task	Name	Created	Started	Last Run	Enabled
Extract	ExtractTask	28/02/12 10:36 ...	28/02/12	10/09/13 10:21 ...	<input checked="" type="checkbox"/>
SubmitFromOutbox	SubmitFromOutbox	12/07/13 11:19 ...	12/07/13	10/09/13 10:10 ...	<input checked="" type="checkbox"/>
Extract	ExtractTask2	28/02/12 11:01 ...	28/02/12	10/09/13 10:21 ...	<input checked="" type="checkbox"/>
Report	ReportDownload	11/06/12 10:23 ...	11/06/12 10:21 ...	10/09/13 10:21 ...	<input checked="" type="checkbox"/>

Setting up Notifications

Start PayCentre Organiser > right click the relevant task > Edit > Notifications...



The 'Add/Edit Task' dialog box is shown with the 'Notifications' tab selected. The 'Name' field contains 'ExtractTask'. The 'Start' field is set to '28/02/2012 00:00'. The 'Interval' is set to '1' minutes. The 'Days to extract for' is set to '0'. The 'Run on Weekends', 'Run on Bank Holidays', 'Catch up on missed run', and 'Enabled' checkboxes are all checked. The 'Applications' list is empty. A yellow 'Notifications...' button is visible in the bottom right corner of the dialog box.

In the Notifications settings the Interval is the rate at which the user will be emailed their notifications. It is advised that this is set up in conjunction with the interval that the PCO task the notification relates to is run.

To add a user's email address, click the envelope with the green + input the users email address and name in the given fields.

Notification Settings

Interval: 15 Minutes

Email	Name	Notify

Email: _____
Name: _____

Notification events:

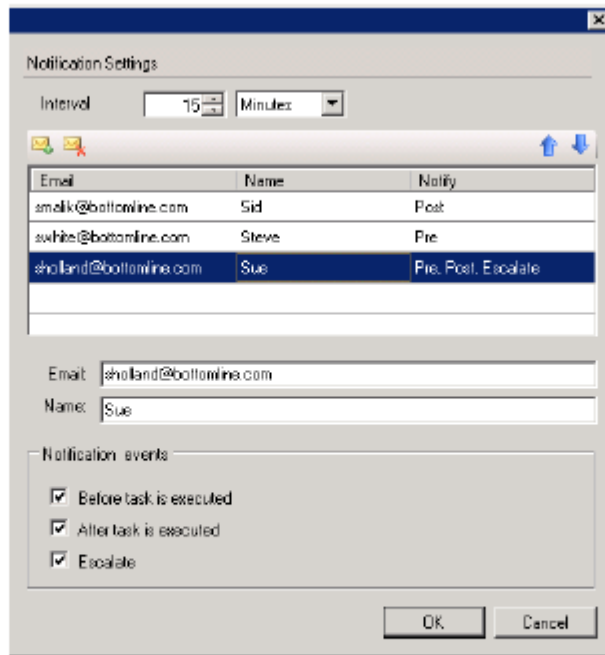
Before task is executed
 After task is executed
 Escalate

OK Cancel

Notifications events can be generated against each task to notify the customer at the following times:

- Prior to the task executing – Notifies the users when a task is about to run.
- After the task has executed – Notifies the user that a task has run and also gives a minimal breakdown of what the outcome was i.e. if there were successful/failed data when the task ran.
- On Escalation – Notifies the customer only if there is a failure within the task.

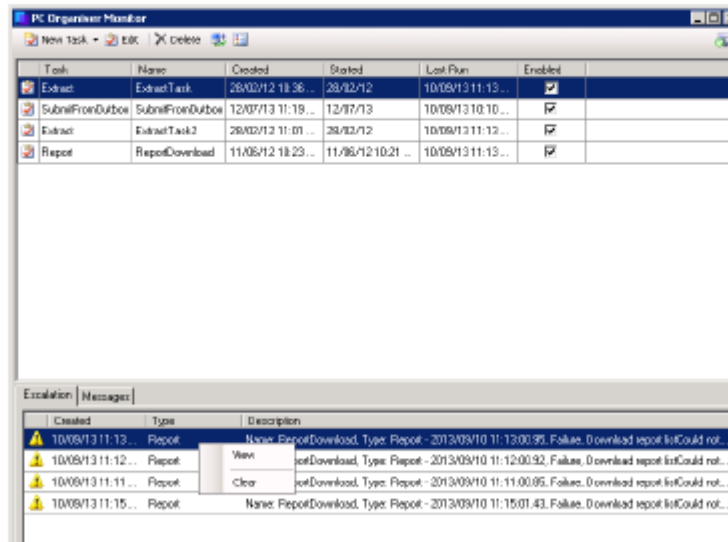
You can individually set which notification event each email address /user wish to be notified against. Once the email details have been input and the relevant notification events have been selected, click the envelope with a green + again and this will add the email address to the notification list.



Once the email details have been input and the relevant notification events have been selected, click the envelope with a green + again and this will add the email address to the notification list.

Once all changes have been made, restart the PayCentre Organiser service for the changes to take effect.

In the event that a user has 'Escalate' checked, they will receive a notification continuously at the interval selected until the Escalation for that notification is manually cleared within the PCO Monitor on the escalation tab. This can be cleared by right clicking the escalation and selecting 'clear'.



If any issues are seen when performing procedures described in this document, or to discuss other Technical issues with your software, please feel free to contact Bottomline Technologies Technical Support Department on 0870 081 8250 (2) or email emea-support@bottomline.com