

Oil and Gas Information Systems, Inc.
OGSQL 1.30 Enhancement Documentation
OGSQL E-Mail Module

Introduction

Beginning with OGSQL version 1.30, the E-Mail component has undergone significant improvement with an eye towards fault tolerance. The concept of an "E-Mail Output Manager", not unlike the standard Output Manager" has been introduced in order to allow users to track, edit and re-send e-mails for various reasons such as delivery failure, incorrect e-mail address, invalid server configuration, etc. It also allows the user to run the e-mail generating process (i.e. JIB, RSS, etc) and defer the actual transmission of e-mails until a later time. This document details the most recent enhancements to the E-Mail system. Please consult other documentation regarding the basics of the OGSQL E-Mail module.

Impact

This enhancement applies to all "E-Mail Aware" modules in OGSQL:

- JIB - Joint Interest Billing
- RSS - Revenue Summary Statements
- ARS - Accounts Receivable Statements
- 425 - Net Distribution Reports
- PCK - Accounts Payable Check Print
- RCK - Revenue Check Print

Changes in E-Mail Aware Modules

In each of the aforementioned modules, an option "Send Email Now" has been added:

Summarize identical detail lines.	<input type="checkbox"/>
Send Emails Now	<input checked="" type="checkbox"/>
Print Email Invoices Now	<input type="checkbox"/>

When checked, OGSQL will attempt to process e-mails as output is generated. This is identical to the behavior of the E-Mail system before the enhancement. When unchecked, E-Mail output will still be generated, but it will not be transmitted until later initiated by the user in "Email Output Maintenance" (EOM). In either case, all E-Mails generated by the process will be logged and preserved in case a need to re-send arises. Whenever the user elects to actually transmit the e-mails, they will receive a report indicating the status of each transmit attempt. This is report EOM-03.

Changes to System Parameter Maintenance (SPM)

As mentioned above, OGSQL will maintain a record of individual E-Mails and their associated attachments for reporting and or re-send. The System Parameter Maintenance program (SPM) controls how long these E-Mails are retained. The setting "Email Retain Days" in SPM (Master Screen 2 tab) limits how many days

an E-Mail is kept. Any E-Mail existing beyond this cutoff period will be purged by the next General Ledger Close operation.

Email Output Maintenance (EOM)

Select an Email, then click the Retrieve button to view or edit its data.

Email Message Selection

Email #: ... Session #: Last Email:

Company: Date Sent:

Entity: Purpose:

General | Email Message

Subject:

Recipient URL: Send Attempted

Server URL:

Auth. Required: User ID: Password:

Return URL: Blind Copy

Buttons: Close, Run Report, Help, Retrieve, Lock, Next, Previous, Save, Discard

The EOM program found under Master Maintenance / Miscellaneous Maintenance is where the user can manage individual E-Mails. Users can edit properties, re-send, as well as generate reports. The main screen (shown above) allows the user to select an individual E-Mail and either Inquire or Edit properties such as Subject, Recipient Address and so on. Changes to these properties relate only to the specific e-mail selected. For example, if you change the Recipient Address of an e-mail for a Vendor, saving this change *does not* update the E-Mail address on file for the Vendor.

Specific Fields:

- Subject – This is the subject line for the E-Mail
- Recipient URL: This is the destination E-Mail address
- Send Attempted: Controls whether OGSOL believes a successful attempt has already been made to send this E-Mail
- Server URL: See EML documentation
- Auth Required: See EML documentation
- User ID: See EML documentation
- Return URL: This is the return address for the E-Mail
- Blind Copy: Controls whether a BCC is generated to the return address

In order to run reports or re-send e-mails, click the Run Report button in the upper right corner of the EOM screen.

E-Mail Maintenance Report

Generate an Email Report or Re-Send Emails using the following selections. Populate the Selection entries as needed.

Report Type: EOM-01 EMail Reference Report

Session # From: [] ... Thru: [] ...

Email # From: [] ... Thru: [] ...

Company Selection: ... All Companies

Owner Selection: ... All Owners

Vendor Selection: ... All Vendors

Send Date From: [] Thru: []

Purpose: All Purposes

Use Current URLs and Rules instead of Email's Original Parameters

Send Only if Marked "Not Sent"

OK
Cancel
Help

The screen above allows the user to run reports or re-send e-mails. The various options on the screen allow the user the ability to filter exactly what the report will contain, or what E-Mails will be re-sent.

Specific Fields:

- Report Type: Controls what clicking the OK button will generate:
 - EOM-01 – Email Reference Report
 - EOM-02 – Addressed Image Report
 - EOM-03 – Send E-Mails
- Session # (From – Thru): Allows the user to specify which E-Mail session(s) will be processed.
- Email # (From – Thru): Allows the user to specify which individual E-Mails will be processed.
- Company Selection: Allows the user to filter by Company (All, Single, User Specified)
- Owner Selection: Allows the user to filter by Owner (All, Single, User Specified, Owner Batchname)
- Vendor Selection: Allows the user to filter by Vendor (All, Single, User Specified, Vendor Batchname)
- Send Date (From – Thru): Allows filtering by the E-Mail date

- Purpose: Allows filtering by originating module (see Impact section above for members)
- Use Current URLs and Rules instead of Email's Original Parameters. When checked, the individual E-Mail's properties will be overridden (where applicable) by the current company level selections defined in the EML module. Otherwise, the individual E-Mail's original properties will be used.
- Send Only if Marked "Not Sent": Sends or reports only on those e-mails not yet sent, or not yet successfully transmitted

WARNING: Running EOM-03 with no filtering and Send Only if Marked "Not Sent" will cause OGSOL to send every E-Mail within the retention period as defined by SPM and the most recent General Ledger Close. Use with extreme caution. A good precaution would be to run EOM-01 with the desired filtering, examine the output and *then* send with EOM-03.