ActiveMail

Version 80000

Quick Installation
And
User's Guide

What's New for 80000

Tempest 8 Upgrade. Changes to support Tempest 8.

Documentation changes indicated with teal arrow. Now you can see what has changed in this document by looking for the teal arrows. This saves existing users time having to read the entire document looking for changes!

Upgrading from a previous version? See the Upgrade Notes at the end of this document for helpful advice.

1. Installing ActiveMail

System Requirements

Internet Server:
- Requires an IIS server, running ColdFusion MX 8, with a Data Source connection to the Tempest database

Tempest Licences:
- Calls
- Web Customer

Mail Server:
- ColdFusion MX on the Internet Server above must be able to route mail to an email server

Run the Install package

Go to the www.mpowered.biz and click on Downloads. Run the appropriate setup package with highest patch number corresponding to your Tempest version. The Setup Wizard will guide you through set up. When done, you will have a new program group: Start > Programs > Mpowered > ActiveMail. Under this entry is a shortcut to this document, the Quick Installation and User's Guide.

Copy the cfm to a virtual directory on the Web server

There will be one cfm file installed to the C:\Program Files\Mpowered\ActiveMail\ColdFusion directory:
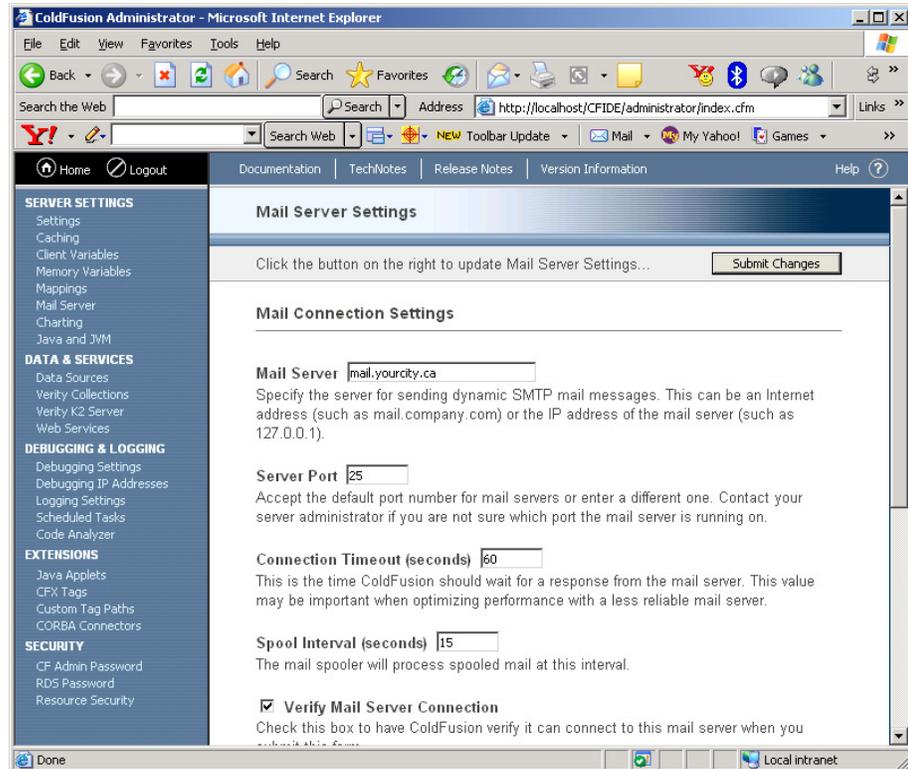
activemail.cfm

This .cfm file needs to be copied into a virtual directory on the Web Server. The recommended location for this directory is:

C:\Inetpub\wwwroot\Mpowered\ActiveMail

Ensure that ColdFusion is connected to a mail server

On your Web Server, go into the ColdFusion Administrator, click on Mail Server, and ensure that a valid (i.e. verified) Mail Connection exists:

MpoweredWeb database user and permissions

The Tempest Live and Test databases will both require a new database user - MpoweredWeb. With your database Enterprise Manager, give the following table permissions to MpoweredWeb:

GRANT INSERT,UPDATE ON wc_customer_notes TO MPOWEREDWEB;
GRANT SELECT ON calls_calls TO MPOWEREDWEB;
GRANT SELECT ON calls_problems TO MPOWEREDWEB;
GRANT SELECT ON calls_problem_classes TO MPOWEREDWEB;
GRANT SELECT ON calls_workflow TO MPOWEREDWEB;
GRANT SELECT ON land_relation TO MPOWEREDWEB;
GRANT SELECT ON land_legal TO MPOWEREDWEB;
GRANT SELECT ON tempest_client TO MPOWEREDWEB;
GRANT SELECT ON tempest_release_header TO MPOWEREDWEB;
GRANT SELECT ON tempest_resource_contact_dtls TO MPOWEREDWEB;
GRANT SELECT ON tempest_resources TO MPOWEREDWEB;
GRANT SELECT ON tempestv_security_all TO MPOWEREDWEB;
GRANT SELECT ON wc_customers TO MPOWEREDWEB;
GRANT SELECT ON wc_customer_notes TO MPOWEREDWEB;

Ensure that valid ColdFusion Data Sources exist

The installation requires two Data Sources (DSNs in ColdFusion Admin), one to the Live and Test Tempest databases logging in as the database user MpoweredWeb.   Appropriate names for these Data Sources would be "MpoweredLive" and "MpoweredTest".   (Note: be sure to use **JDBC** drivers in ColdFusion for Oracle by using the "other" Driver type. The Adobe ColdFusion web site has information on setting up JDBC data sources if this is your first time. SQL Server users should use the built-in Microsoft SQL Server driver.)

On your Web Server, go into the Cold Fusion Administrator, and ensure that valid (i.e. verified) Data Sources to the Tempest Live (MpoweredLive) and Test (MpoweredTest) databases exist. The UserName (under Advanced Settings for the Data Source) should be **MpoweredWeb** – do not use TempestWeb.

Create the FieldWorksUsers customer in Web Customer

In Tempest create a FIELDWORKSUSERS customer if you do not
already have one. Make the user an INTERNAL type:

Run activemail.cfm in a browser

Open up a browser and run activemail.cfm with a URL variable named v04 set to the ColdFusion datasource from above. In the example below, the datasource is fieldworkssql, but you will most likely have a datasource named TempestTest, or something similar:
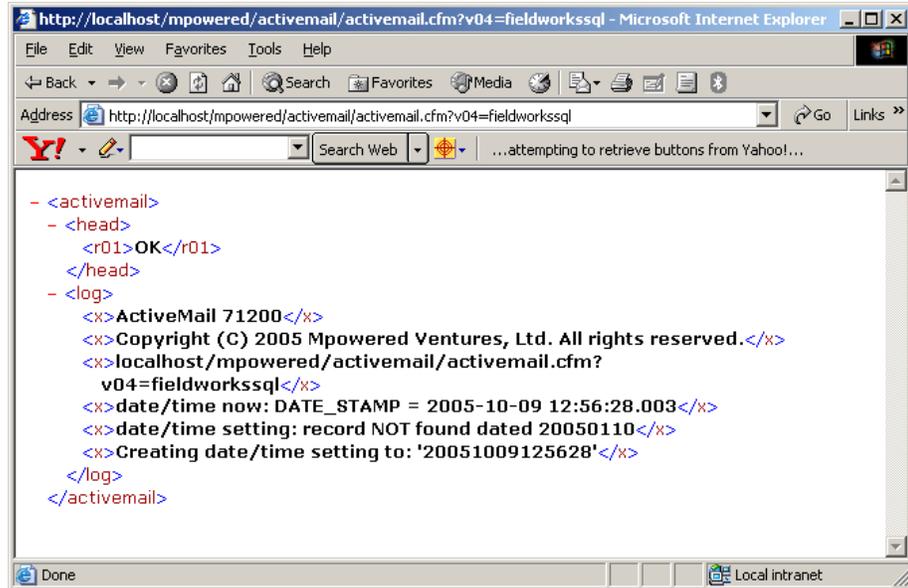

```
- <activemail>
  - <head>
      <r01>OK</r01>
    </head>
  - <log>
      <x>ActiveMail 71200</x>
      <x>Copyright (C) 2005 Mpowered Ventures, Ltd. All rights reserved.</x>
      <x>localhost/mpowered/activemail/activemail.cfm?
        v04=fieldworkssql</x>
      <x>date/time now: DATE_STAMP = 2005-10-09 12:56:28.003</x>
      <x>date/time setting: record NOT found dated 20050110</x>
      <x>Creating date/time setting to: '20051009125628'</x>
    </log>
</activemail>
```

By running the activemail.cfm for this Data Source, it has created the record in the FIELDWORKSUSER that tracks the last time ActiveMail ran. This is used the next time ActiveMail runs to determine the timeframe to check for newly-assigned Calls in. The control record is always dated Jan 10, 2005:
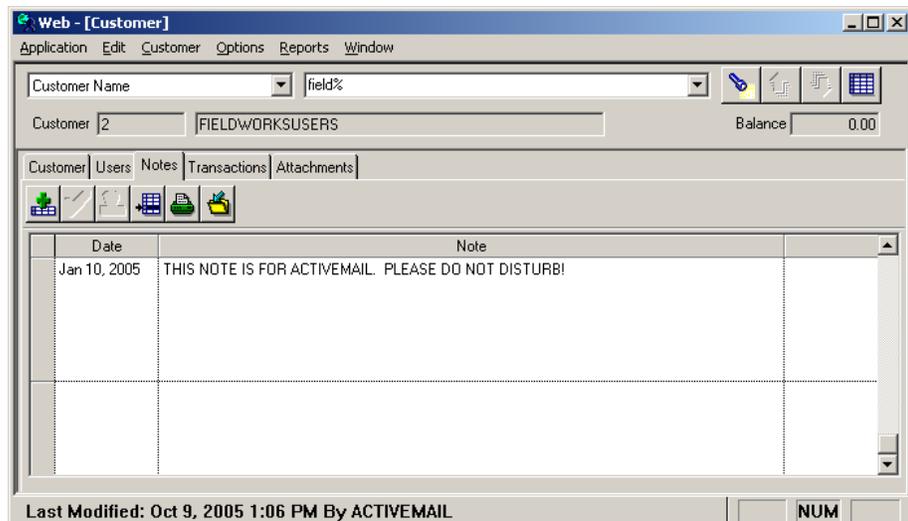
As the Note in this record states, you should not disturb (i.e. delete or change) this note using Web Customer. ActiveMail uses it for processing. Note that if the note is deleted, ActiveMail will simply build itself a new one the next time it is run.)

Create the AM_SYSADMIN resource and email address

In Tempest, create an AM_SYSADMIN resource as shown below:

Note that the login will usually be disabled for this resource, and no database login is required. ActiveMail will use this account's email address, which is set up on the Contact Details tab in the next step:

The email address you set up for AM_SYSADMIN should be the person who will receive system administration messages related to ActiveMail (system upgrade messages, system error messages, etc.)

2. ActiveMail/Calls setup

ActiveMail/Calls will require an additional control record (or a control file – discussed later) to indicate which users should have Calls emails sent to them. This control record must be dated Jan 11, 2005, and a sample showing the userid GEORGE with an email address of george@mpowered.biz and an email style of full (more about that later) is shown below:
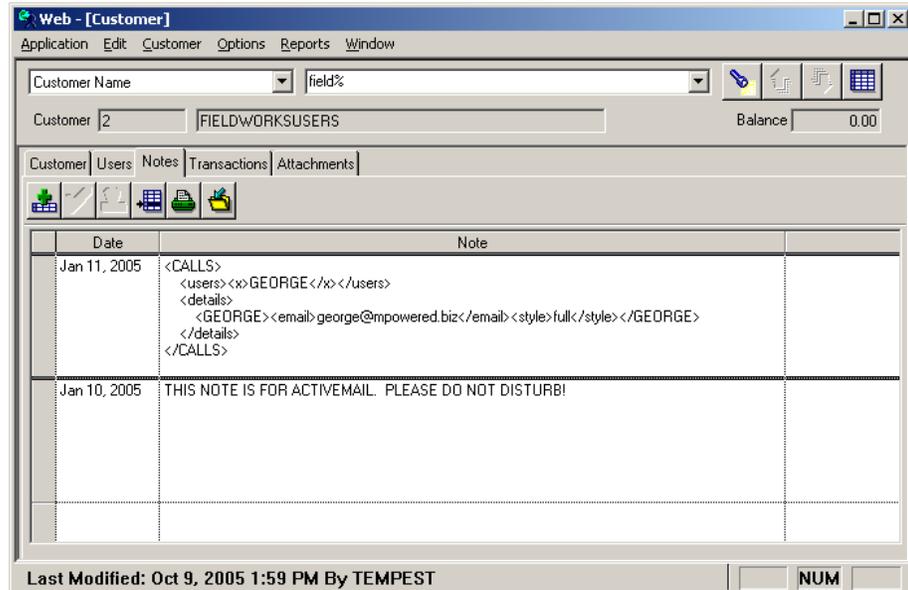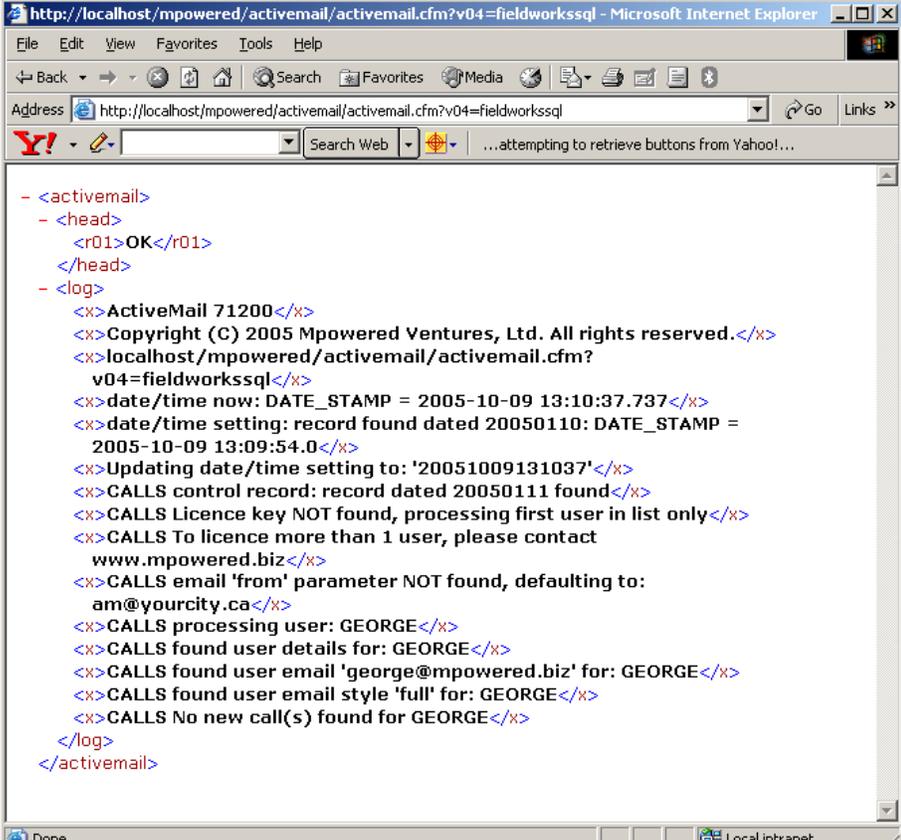

Create a similar control record for a userid and email address that you can assign a call to. Follow the above example exactly, substituting in the userid and email address where appropriate in the xml. If you do not form the xml correctly, ActiveMail will complain in the next step. For example, if your userid is PSMITH and the email address is **psmith@city.ca**, then you would enter the following into the Jan 11, 2005 note:

```
<CALLS>
  <users><x>PSMITH</x></users>
  <details>
   <PSMITH><email>psmith@city.ca</email><style>full</style></PSMITH>
  </details>
</CALLS>
```

Run activemail.cfm again

Run activemail.cfm again:

```
http://localhost/mpowered/activemail/activemail.cfm?v04=fieldworkssql - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back        Search   Favorites   Media

Address   http://localhost/mpowered/activemail/activemail.cfm?v04=fieldworkssql        Go   Links

Y!           Search Web        ...attempting to retrieve buttons from Yahoo!...

- <activemail>
  - <head>
      <r01>OK</r01>
    </head>
  - <log>
      <x>ActiveMail 71200</x>
      <x>Copyright (C) 2005 Mpowered Ventures, Ltd. All rights reserved.</x>
      <x>localhost/mpowered/activemail/activemail.cfm?
        v04=fieldworkssql</x>
      <x>date/time now: DATE_STAMP = 2005-10-09 13:10:37.737</x>
      <x>date/time setting: record found dated 20050110: DATE_STAMP =
        2005-10-09 13:09:54.0</x>
      <x>Updating date/time setting to: '20051009131037'</x>
      <x>CALLS control record: record dated 20050111 found</x>
      <x>CALLS Licence key NOT found, processing first user in list only</x>
      <x>CALLS To licence more than 1 user, please contact
        www.mpowered.biz</x>
      <x>CALLS email 'from' parameter NOT found, defaulting to:
        am@yourcity.ca</x>
      <x>CALLS processing user: GEORGE</x>
      <x>CALLS found user details for: GEORGE</x>
      <x>CALLS found user email 'george@mpowered.biz' for: GEORGE</x>
      <x>CALLS found user email style 'full' for: GEORGE</x>
      <x>CALLS No new call(s) found for GEORGE</x>
    </log>
</activemail>

Done                                                           Local intranet
```

ActiveMail is now scanning through Calls to find newly assigned Calls, and send them via email. In the next step, we will assign (or re-assign) a Call, and watch it pop up in our email inbox.

Some things to note:

1. The message "**CALLS Licence key NOT found, processing first user in list only**" is to let you know that ActiveMail is not licenced, and it will only process one user as a trial. You can continue to use ActiveMail with one user for as long as you like. When you want to activate ActiveMail for more than one user, contact **www.mpowered.biz** for licence pricing and to purchase a licence. You only need one licence for ActiveMail, and you can set up as many users as you like!

2. The message "**CALLS email 'from' parameter NOT found, defaulting to: am@yourcity.ca**" is to let you know that a 'from' email address has not been set in the ActiveMail Calls control record. Emails will be tagged as being from 'am@yourcity.ca' until you create the 'from' email address, a process that is described later. It will not hurt anything to leave this as is for now.

Assign (or re-assign) a Call to the user

In Calls, create a new Call for the user that you created above:

Now, run ActiveMail again:

Check the Inbox you set up

Did you get the "you have mail" ding? ActiveMail found the newly assigned Call, and since GEORGE is on the list to be emailed, it sent off the notification!

```
Yahoo! Mail - george@mpowered.biz - Microsoft Internet Explorer    _ □ ×

File   Edit   View   Favorites   Tools   Help

Back ▼        ▼  ×  ⟳  🏠   Search  ⭐ Favorites        ⊘ ▼        »  »  Links  »

Date:     Sun, 16 Oct 2005 14:27:44 -0700 (PDT)

From:     am@yourcity.ca

To:       george@mpowered.biz

Subject:  Call 105689 assigned


Description: The grass field in front of that address has not been cut
all summer, and small to medium sized cats have started to play savanna
with pedestrians walking by.

UNSIGHTLY PROPERTY / GRASS EXCEEDING 20CM Priority: NORMAL - Followup!
Reference: REF123

BELLTELUS, ROGER
124 MAIN ST
ANYTOWN BC V1Z 3EZ
Phone1: 604-555-1234 cell
Phone2: 604-555-1235 home

Call Location: 123 MAIN ST

ASSIGNED to: GEORGE RAYMOND on: Oct 16, 2005 at: 1:59PM There's an
orange Tabby that is armed and dangerous in that field somewhere.  Lookout!

ENTERED by: CALLCENTRE on: Oct 16, 2005 at: 1:56PM

Sent to you by an unlicenced version of ActiveMail. To licence
ActiveMail see www.mpowered.biz


🔲 Done                                          🖳 My Computer
```

Alternatively use a control <u>file</u>

If you find that the control record needs to be larger than what can be stored in the WebCust note (2000 bytes), you can use a file stored in the same web directory as the ActiveMail ColdFusion files. The name of this file must be 'callscontrolfile.txt'. If found, this file completely overrides any information in the WebCust control record:
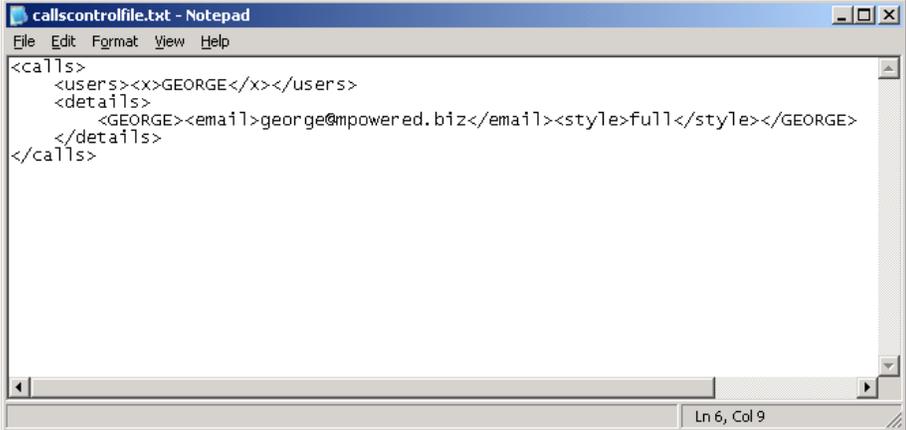
```
callscontrolfile.txt - Notepad
File  Edit  Format  View  Help
<calls>
    <users><x>GEORGE</x></users>
    <details>
        <GEORGE><email>george@mpowered.biz</email><style>full</style></GEORGE>
    </details>
</calls>
                                                                    Ln 6, Col 9
```

The downside to using a control file (as opposed to the WebCust note) is that the configuration data is not backed up along with your database, so you should ensure that appropriate backup steps are in place for the callscontrolfile.txt file.

Adding more users to the user list

To add more users (once you have a registered licence), go into the FIELDWORKSUSERS customer, and add the userid to the <users> list, and then add the email details for the user to the <details> list. For example, we have added userid FRANK below:
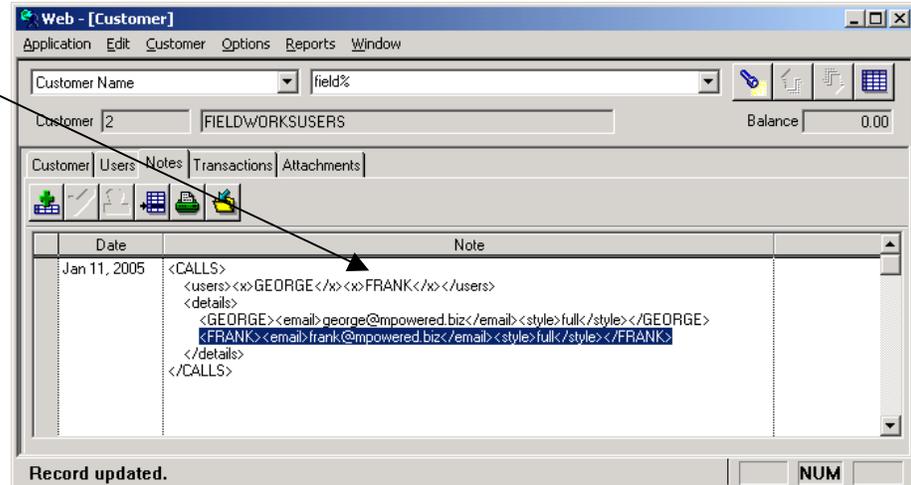

ActiveMail currently supports up to approximately 20 users when using the WebCust method. If you are using the callscontrolfile.txt method, you have an unlimited number of users.

NOTE: You can only have one email address per userid. The one-to-one relationship of Calls user to email address is enforced because having multiple emails per user may result in confusion as to which inbox should answer the Call.

Changing a user's email style

ActiveMail can send two types of message: a 'full' email style (which is the default), and 'sms' style. You can use 'sms' style for sending notifications to cell phones that accept sms messaging to an email address. For example, if your phone number is 6045551234, your carrier may allow you to send 'sms' messages to an email such as 6045551234@carrier.net (review your cell phone documentation or contact your carrier (e.g. Bell, Telus, Rogers) for more details).

Change the user's email style in FIELDWORKSUSERS:
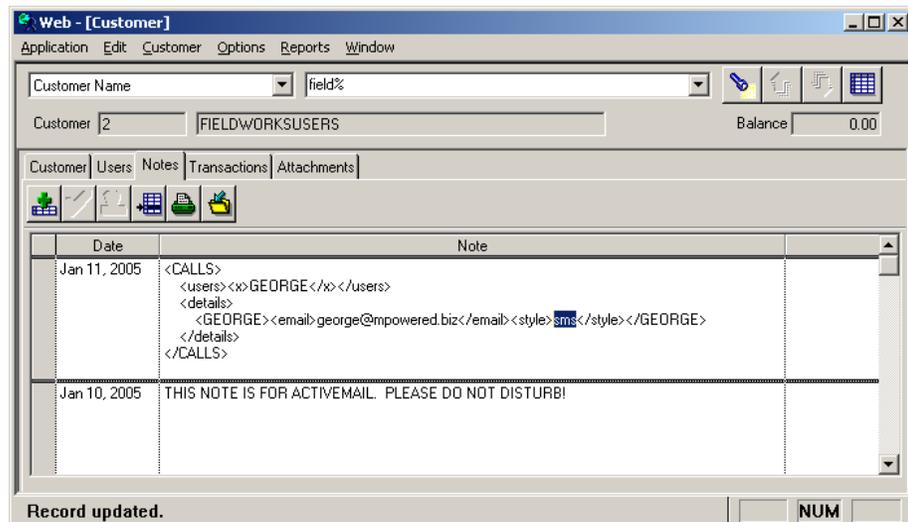
When you run ActiveMail, it will send a short message indicating a new Call has been assigned:
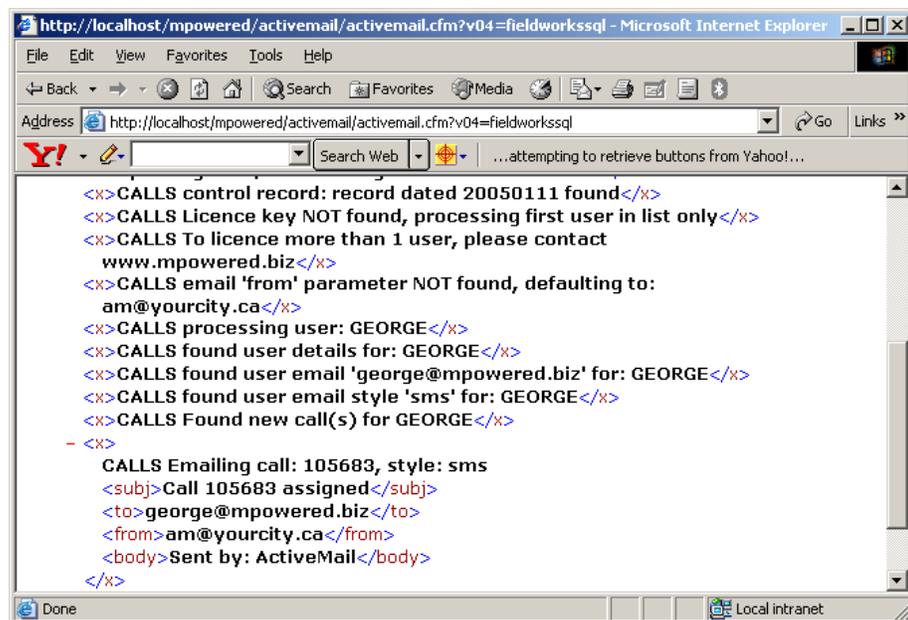
Adding the 'from' email address

The default 'from' address is am@yourcity.ca and you may wish to change this, although it will not hurt anything to leave it as is. For example, you could change this to the email address of your dispatch centre if you wanted your users to reply to indicate receipt

Add a line as shown below to the Calls control record in FIELDWORKSUSERS, changing the actual email address as appropriate:
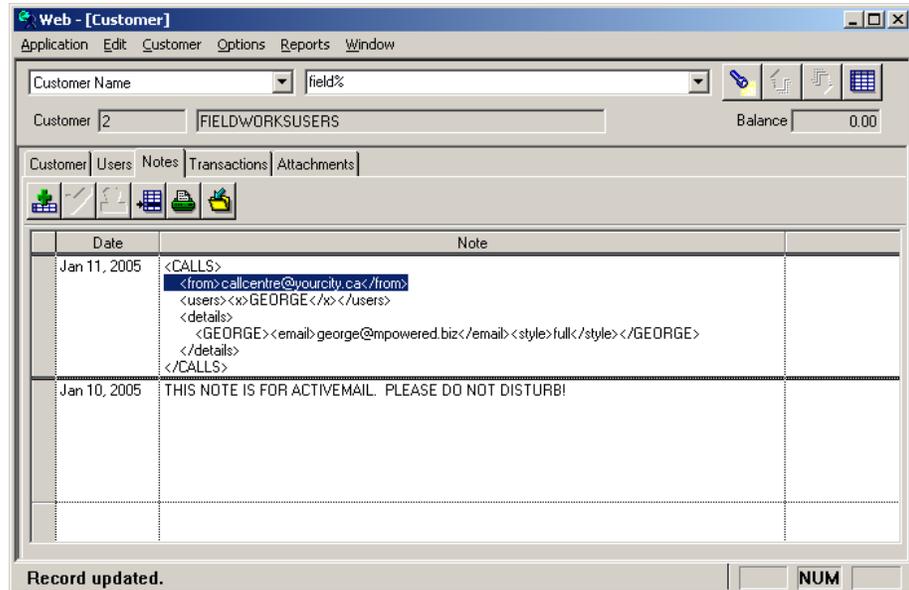

Running ActiveMail will produce a message similar to the following:
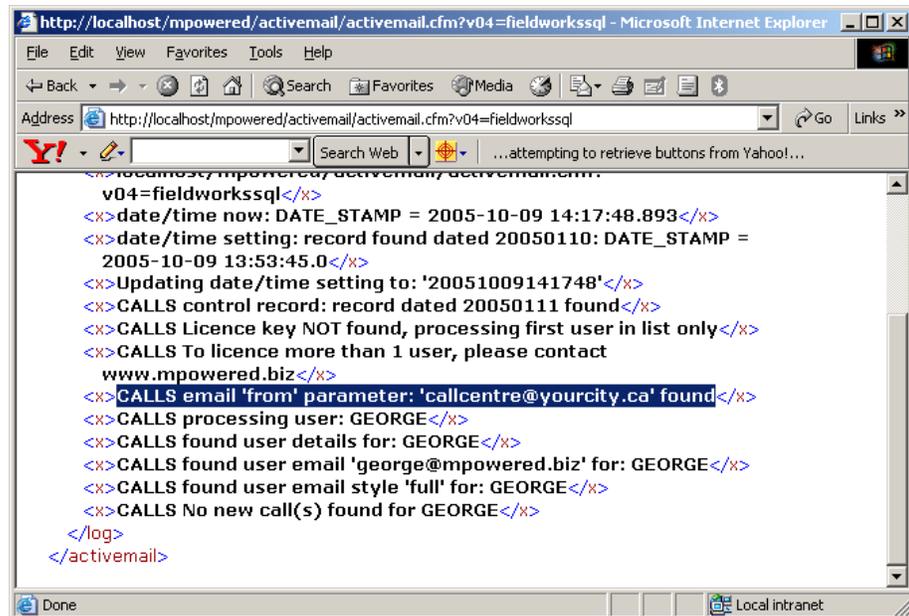
3. Setting up ActiveMail to run on a schedule

To make ActiveMail really useful, you will want to set it up so that runs on a regular basis. ColdFusion allows you to set up a scheduled task that will run at regular intervals. Go into your ColdFusion administrator, click on Scheduled Tasks, and click on the **Schedule New Task** button. Add a task similar to the following:
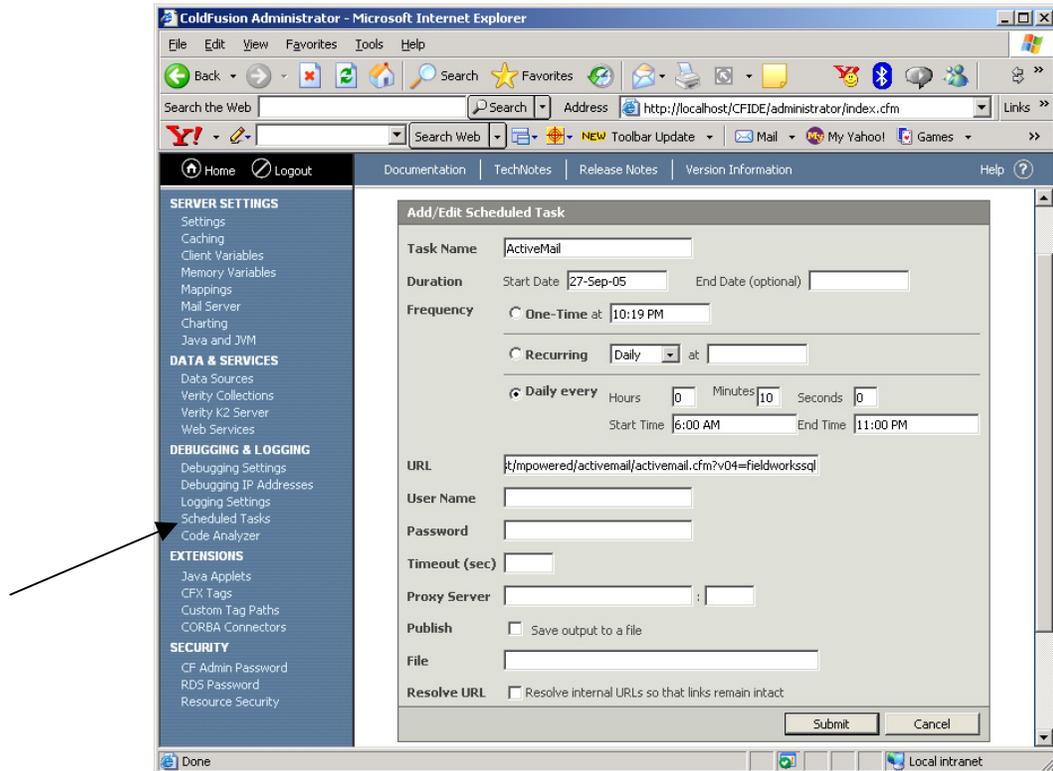
In this example, we're calling the task ActiveMail, and we're going to run it every 10 minutes, starting at 6AM until 11PM.

Upgrading from a previous version

1. Upgrade the Coldfusion server with the new 80000 cfm files.
2. Run the following SQL using a system DBA account:
    grant select on tempestv_security_all to mpoweredweb;
3. Update your licence key with the new licence key emailed to you by
    Mpowered for ActiveMail 80000. Your existing 72000 licence key will be
    stored in one of two places: 1) a note in Tempest WebCust under Customer
    FIELDWORKSUSERS dated Jan 11, 2005; or 2) using a text file on the
    web server in the same virtual directory as activemail.cfm. The text file
    will be named callscontrolfile.txt. Option 2, if used, will trump option 1.
    You will find the licence key stored as xml something like this:
    <licencekey>3200E6E7110459F4BCB95B8AAADF6D5B</licencekey>
    Replace the inner numbers with the new licence key.

General upgrade notes

All releases and patches are cumulative and include fixes from previous updates.
ActiveMail is integrated with Tempest, and may or may not require maintenance as
Tempest releases major versions and patches as described below.

Major releases
A major release of ActiveMail (AM) will coincide with a major Tempest release,
that is, when any of the first 3 digits of a release change, e.g. 72000 to 80000. You
must (and can only) upgrade AM when you have upgraded the underlying database
in order to continue using AM. (You will need new licence keys from Mpowered at
each major release, which will be automatically shipped to you.) All major releases
are full (i.e. cumulative), i.e. all Coldfusion programs/modules are released as a full
package, and will usually require upgrading the Coldfusion server with the new
version of code. After every major release, run the SQL in Step 2 above using a
system DBA account.

Patch releases
When any of the last 2 digits of a ActiveMail release change, e.g. 80000 to 80001,
this is known as a patch release. Mpowered *does not* synchronize these patches with
Tempest. Therefore, when Tempest releases a patch, there will not necessarily be a
corresponding patch release by Mpowered. Mpowered releases patches in order to
fix bugs and/or introduce new features. All patch releases are full (i.e. cumulative),
i.e. all Coldfusion programs/modules are released as a full package, and will usually
require upgrading the Coldfusion server with the new version of code. After every
patch release, run the SQL in Step 2 above using a system DBA account.

Testing releases/upgrades
Clients may wish to test releases before going into production. This can be
accomplished by setting up an …\mpowered\activemail\test subdirectory on the Web
server and loading patches/release CFMs to this directory. Test ActiveMail from this
new directory. Once testing is complete, the CFMs can be moved to the
…\mpowered\activemail subdirectory.