

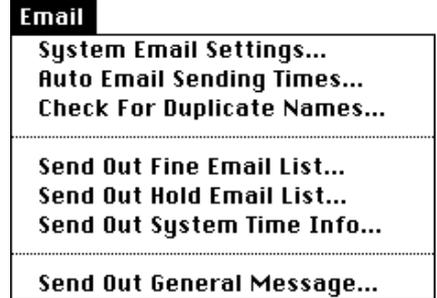
Email

The following section describes all the functions that are contained in the 'Email' menu.

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Email Menu

The 'Email' menu is available in the 'Unlaunched' mode. This menu allows you to decide how and if the email system will function in MacCheckout. 'System Email Settings...' must be configured before you can use any email functions, as they are off by default.



You can also set up some functions to automate the sending of emails during 'Shutdown' and also to actual send out batches of emails.

System Email Settings

Warning:

Your network must be setup to be able to handle email. If you are currently able to send email throughout your institution, then you will have the infrastructure to handle email. The main thing that you require is a 'SMTP' mail server. This allows MacCheckout to send out emails. (*Note:* This is true of any email client.) MacCheckout is currently NOT SOCKS compliant, this means that the machine running MacCheckout MUST be on the same side of any firewall you use as the 'SMTP' mail server machine. If this is not the case, then MacCheckout will hang when you try and send an email and you will have to do a forced 'Quit' (Command-Alt-Shift-Esc) to exit the routines. This will be fixed in a future version.

'System Email Settings' is used to control if and how email will work in MacCheckout.

'Enable' is off by default. In this state email is not available in MacCheckout. The email field in the 'People' card is disabled and the 'Email' button that appears in the system is not shown.

If 'Enable' is on, then email is available in MacCheckout. This allows you to assign email addresses to users and will display an 'Email' button on the 'People ID card', '? Res card', 'Fine card' and 'Agreement Form'.

'Return Email Address' is the email address that a person would use to reply to any email sent out from MacCheckout. This is required by the SMTP RFC 821

The image shows a dialog box titled 'System Email settings' with an 'Enable:

Return Email Address:

Email Signature:

(Include) Organization Name Building Name
 Organization Initials Address
 Phone #

SMTP Server Info:

Name/IP Address:

Auto Email Address Maker

First - Last -

Reverse F. & L. Name Separator: Other Separator:

Extension:

Include ID#: Off Start End All Num. Chars#:

Sample Result:

(Use the example name to illustrate how your location assigns email addresses to people. Everyone entered into the system will have their name altered to form their email address, e.g. M.Robertson)

Use the extension field to add the locations email address and any additions to the name, e.g. @AAA.edu or .Fac@AAA.edu)

protocol specification but can currently be left blank by email senders. However, if actions are taken against spam emailers by ISP's, then you might find your emails blocked if this information is not supplied.

'Email Signature' is the name that will appear at the end of the email text, as the person that the email has come from. Each of the 'include' options can be turned on or off. If 'On', then they are added after the persons name as part of the signature.

'SMTP Server Info' is the name of your SMTP server. This can be a name or an IP address for the actual machine. This is the machine that your facility would use to actually send out any emails. This **MUST** be filled in for the emails to be sent. **Important:** MacCheckout is NOT currently socks compliant. This means that your SMTP server **MUST** be on the same side of any firewall that your institution uses. (**Note:** If this is NOT the case, then if you try and use the email functions, the program will hang. You will have to do a force quit 'Command-Alt-Shift-Esc' to make MacCheckout quit.)

'Name/IP address' is not currently used by MacCheckout. Storage for this item has been included to enable future developments.

Auto Email Address Maker

This has been provided by MacCheckout to ease the creation of email addresses and ensure a consistent application of them throughout the system.

If your institution supplies email address to students, then there is probably a set of rules that are used to create the names. If you set up these rules in MacCheckout, then they can be used to duplicate the email addresses for you.

'First Name' allows you to tell MacCheckout how many letters of the first name your institution uses. Using 'Maxwell' as the example, enter the appropriate part of the name in the field provided. If you only use the initial, then enter a 'M', if the whole name is used then enter the whole name.

'Separator' allows you to choose either a '.' or a '_' as the character that separates the first and last name.

'Other Separator' allows you to enter any character that you want to separate the first and last name. (**Note:** Characters like '@' cannot be used because they are used for other functions.)

'Last Name' allows you to tell MacCheckout how many letters of the last name

your institution uses. Using 'Robertson' as the example, enter the appropriate part of the name in the field provided. If you only use the initial, then enter a 'R', if the whole name is used then enter the whole name.

'Extension' allows you to enter the email information of your institution including the '@' symbol. This will be added to the email name stored on the 'People ID card's, to create a valid email address. It also saves on storage space, as it is only stored once and applied as needed.

'Include ID #:' allows you to use the users ID # as part of the email address. 'Off' turns this setting off. 'Start' and 'End' will place the ID # at either the beginning or end of email address. Since it would not be a good idea to use the whole of a persons ID # from a security standpoint. 'Num. Chars:' allows you to decide how many characters of the ID # you will use. The 'All' option is there, if you require it.

'Reverse L. & F. Name' allows you to reverse the order of the person first and last name.

The field labelled 'Sample Result' shows you what an the email address will look like using the options you have entered.

'Clear Current Example' is a button that can be used to clear all the fields used by the 'Auto Email Address Maker' function. If the fields are empty then MacCheckout will not try and create an email address for you.

(**Note:** When you create an email address for a person, you can always override the 'Auto' settings by entering any complete email address.)

Auto Email Sending Settings

'Auto Email Sending Settings' allows you to set up the rules of if and when MacCheckout will send out emails to the people in the database.

'Fines' and 'Holds' have the same options.

'Send when ****' is imposed' will send an email to a user when they have either a fine or hold applied to their record.

Auto Email Sending Settings:

Fines:

- Send when Fine is imposed
- Send weekly Fine report
- Send monthly Fine report

Holds:

- Send when Hold is imposed
- Send weekly Hold report
- Send monthly Hold report

Send out at: Start or End of time period. (Week or Month)

System Times:

Holiday Notice

- Send notice 1 week before holiday
- Send notice 2 weeks before holiday

End of Active Period

- Send notice 1 week before end
- Send notice 2 weeks before end

Fine and Hold notices get sent to those affected. System Time info will be sent to everyone. Only people with email addresses on file will be contacted.

Emails are sent during 'ShutDown'.

OK Cancel

'Send weekly **** report' will send an email once a week to every user who has a fine or hold on their record.

'Send monthly **** report' will send an email once a month to every user who has a fine or hold on their record.

'Send out at' allows you to decide whether an email sent using the above options will be sent out at the beginning or end of the week or month.

'System Times' allows you to send out the holiday and end of active period information to the people in the database. Each option allows you send out the information either one (1) or two (2) weeks in advance of the date. (**Note:** You can use both options if required.)

(**Note:** All these settings are used during the 'Shutdown' procedure to decide when to send out emails.)

Check For Duplicate Names

'Check For Duplicate Names' can be used after you use the 'Auto Email Address Maker' options. It will go through the data based and check for people with duplicate names. If they have the same names, they will have the same email addresses, which would not be could. (**Note:** This can be a very time consuming process, so use it at a quite time in your schedule.)

Are you sure you want to check for duplicate names and/or email addresses?
(Note: This is a time consuming operation since every name has to be compared to all the others. So use it during a quite period.)

Send Out Fine Email List

'Send Out Fine Email List' and

Are you sure you want to send out the current 'Fine' information?
(Note: Only people with valid email addresses can be sent the information.)

Send Out Hold Email List

'Send Out Hold Email List' can each be used to send emails to anyone in the database who either has a Fine or a Hold assigned to their records.

Are you sure you want to send out the current 'Hold' information?
(Note: Only people with valid email addresses can be sent the information.)

For this to work correctly, the people involved will need to have a valid email address. The commands, on completion, will report back, listing the people who could not be contacted.

Send Out System Time Info

'Send Out System Time Info' allows you to send out the operating times for your facility to the people in the database.

When selected, this dialog box will be displayed. It allows you to filter who the data will be emailed to. 'Add Group' will display a listing of the 'People Status Labels' so that you can target a specific group outside of Employees, Faculty and Student. 'Add ID#' allows you to target a specific person and 'Send to everyone in the database' does what it says. As noted above, people need a valid email address for this to function correctly.

The dialog box is titled "Who do you want to email the Time/Holiday info to?". It has two columns: "People to be sent email:" and "Groups to be sent email:". The "Groups" column contains three radio buttons: "Employee", "Faculty", and "Student". Below the "People" column is an "Add Group" button. Below the "Groups" column is a radio button labeled "Send to everyone in database". At the bottom are three buttons: "Add ID#", "Send Emails", and "Cancel".

Send Out General Message

'Send Out General Message' allows you to send out a text message to people in the database.

When you select this option you will have to supply a line of text that will be used in the 'Subject' field of the email.

When you select 'OK' the composition dialog will be displayed.

The composition dialog allows you to enter whatever message that you want to send out to your user or users. (**Note:** Emails have their lines of text limited to 74 characters. This will be done automatically for you.)

The dialog box is titled "What is the subject title of this general message?". It contains a single text input field. At the bottom right are two buttons: "OK" and "CANCEL".

The dialog box is titled "Please enter the text for the General Email Message below:". It contains a large text area for entering the message. Below the text area is a note: "Note: The 'Return' key allows you to move to the next line of text. However the 'Enter' key triggers the 'Continue' button." Below the note is another note: "All text entered will have lines wrapped at 74 chars automatically when 'Continue' is selected." At the bottom right are two buttons: "Continue" and "CANCEL".

When you select 'Continue', you will be shown this dialog. It allows you to filter who the data will be emailed to. 'Add Group' will display a listing of the 'People Status Labels' so that you can target a specific group outside of Employees, Faculty and Student. 'Add ID#' allows you to target a specific person and 'Send to everyone in the database' does what it says. As with all email functions, people need a valid email address for this to function correctly.

**Email in
'Launched' mode**

In the 'Launched' mode you will also have access to 'Email'. However, it is only when it is appropriate. In that circumstance you will see an 'Email' button at the bottom of the screen.



Areas where it is appropriate are: on the 'Persons ID' cards, on the '? Res' cards, on the 'Agreement Form' cards and on the 'Fine' cards. When you select the button you will be presented with this dialog. This allows you to access all the functions as noted previously on the 'Email' menus. However, the difference here is that you can only send an email to the person whose record you are accessing. This helps prevent abuse of the system.