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TA Instruments Configuring & Testing Platinum Mail & Messaging

Introduction

Email and Windows Messaging are built-in components of the Advantage software Platinum features. This feature provides a mechanism for the controller software to communicate with the operator based on subscribed events. Proper installation and setup are required for this function to work properly. This document provides the following instructions needed to configure and test the Platinum mail and messaging features. Perform these steps in the order shown:



- (1) Establishing a Database Connection for Mail Messaging
- (2) Configuring Windows® for Mail and Messaging
- (3) Configuring Platinum Mail and Messaging Functions
- (4) Testing Platinum Mail and Messaging Functions

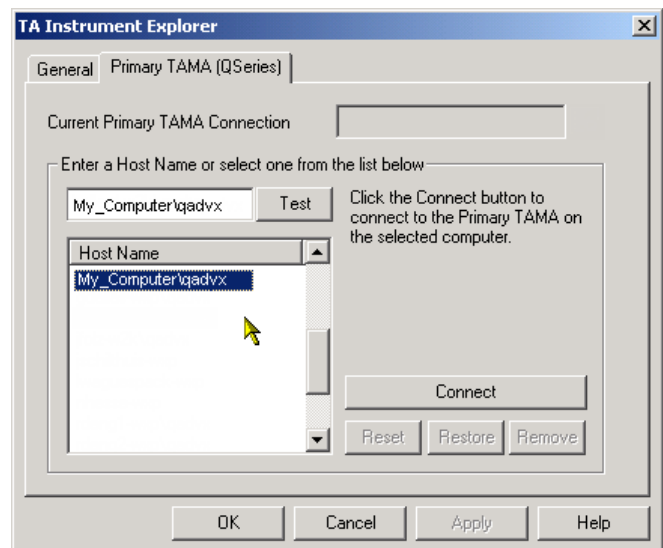
Once the Platinum Messaging has been properly installed and set up, you can begin to use this feature to send emails and notification messages directly from the instrument control program. Messaging is available for the following tasks: individual runs, sequences (experimental and calibration), auto diagnostics, auto weight calibration.

(1) Establishing a Database Connection for Mail Messaging

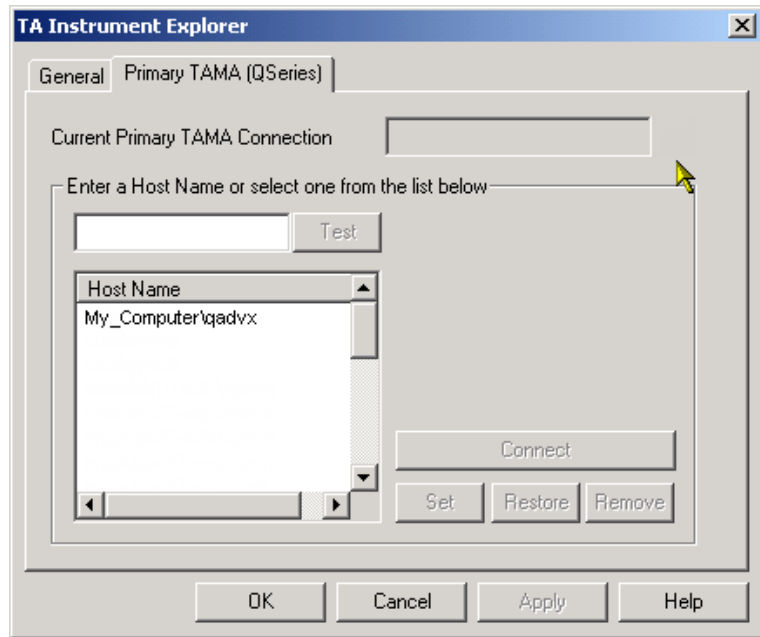
Follow the instructions below to establish a primary TAMA (TA Message Agent) database connection with the software and/or install the necessary components.

NOTE: If you have multiple, networked computers with Thermal Advantage software installed, you only need to establish one TAMA database for messaging.

1. Open the TA Instrument Explorer program by double clicking on the  icon on your desktop.
2. Press the **Settings**, , button on the TA Instrument Explorer tool bar.
3. Click on the **Primary TAMA** tab. The figure shown to the right is displayed.



4. Check to see if a TAMA database is already established by looking in the **Current Primary TAMA Connection** field. If the database is not currently connected, look in the **Host Name** list for an available TAMA database station. Listed are all the visible computers that have a SQL database installed. The computers having a TAMA database available will have the format "hostname\qadvx."
5. Select the name from the list then click **Test** to verify TAMA database installation and operation. A message will be posted, if test is successful. Select **Yes** to connect to computer, if desired. (Alternatively, you can connect using the **Connect** button.)
6. Proceed with the next section, "Configuring Windows® for Mail and Messaging."



(2) Configuring Windows® for Mail and Messaging

You can use Platinum Mail and Messaging for Q Series™ to send two different types of communications—event-based pop-up messages to other computers using the Windows® Messenger service or event-based email messages using Outlook (or Outlook Express). Installation of SQL 2005 Express SP2 and establishment of a Q Series TAMA database is required *before* configuring the mail and messaging options as described in this section. (See the instructions beginning on page 1, if needed.)

Setting Up the Windows® Messenger Service

To send pop-up messages to other computers you can use the Windows® Messenger Service provided with Windows 2000 and XP.

1. Open a Command Prompt (**Start/Programs/Accessories/Command Prompt**).
2. Type **Services.msc** and press Enter.
3. Locate the "Messenger" service in the list.
4. Double click on "Messenger" to open the **Services** window.
5. Click the **Start** button, if the **Service status** is stopped.
6. Verify/choose the "Automatic" **Startup Type**.
7. Click **OK** to accept the choices then close the **Services** window and Command Prompt window. The Messenger Service is now enabled.

Setting Up Outlook Express for Email Messaging

Introduction

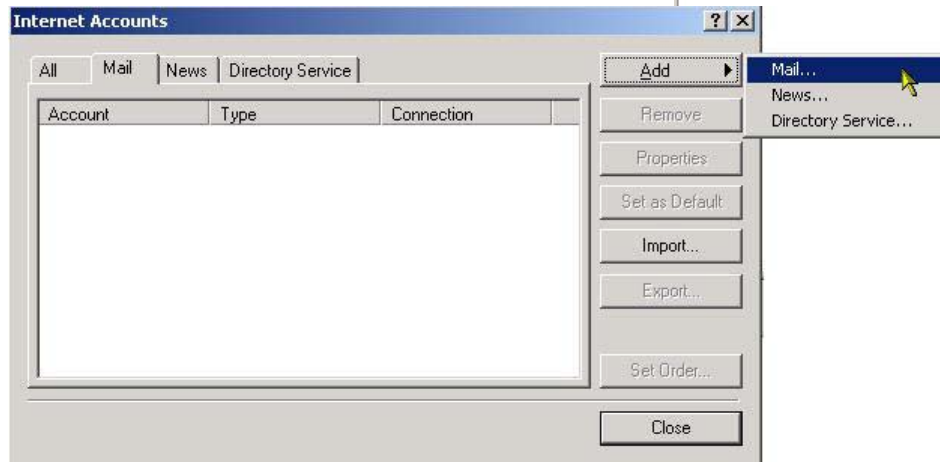
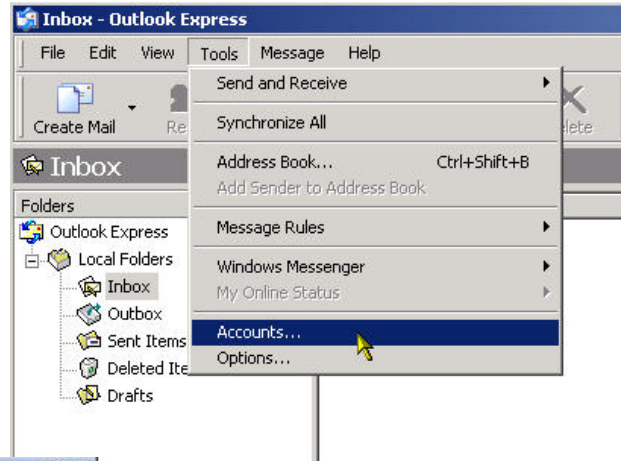
To use these Platinum features, you will need to properly configure Microsoft® Outlook or Outlook Express (provided with Internet Explorer) email client on the Q Series instrument controller workstation.

- If you are using Microsoft Outlook, your mail administrator should set up your account for you. Continue with section (3) "Configuring Platinum Mail and Messaging Functions."
- If you are using Outlook Express, you need to know the following information for setup:
 - Names of your incoming email servers (POP3, IMAP, or HTTP)
 - Names of your outgoing email servers (SMTP)
 - Your email address
 - Your account login and password. (This information is also obtained from your mail administrator or ISP.)
- It is recommended that you set up an email account that is separate from your personal or corporate account for use by Q Series Mail.
- Any email service (even free ones such as Yahoo mail, Google Gmail, AIM mail, Juno, Lycos, etc.) that can be accessed from Outlook or Outlook Express can also be used with Q Series Mail.

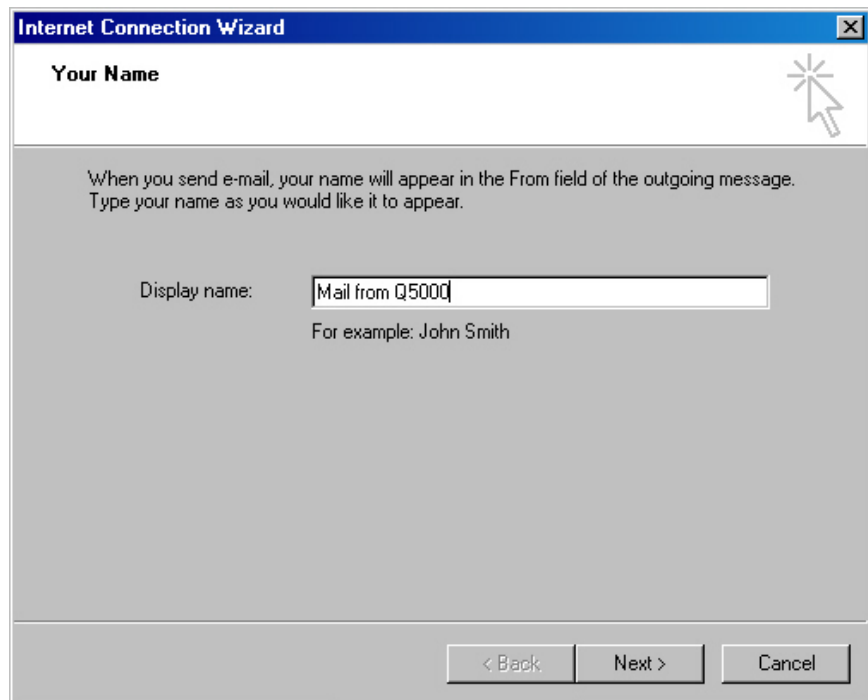
Instructions to Set Up Outlook Express

Follow the steps below to configure Outlook Express for messaging and email (Examples shown are for Outlook Express 6.00):

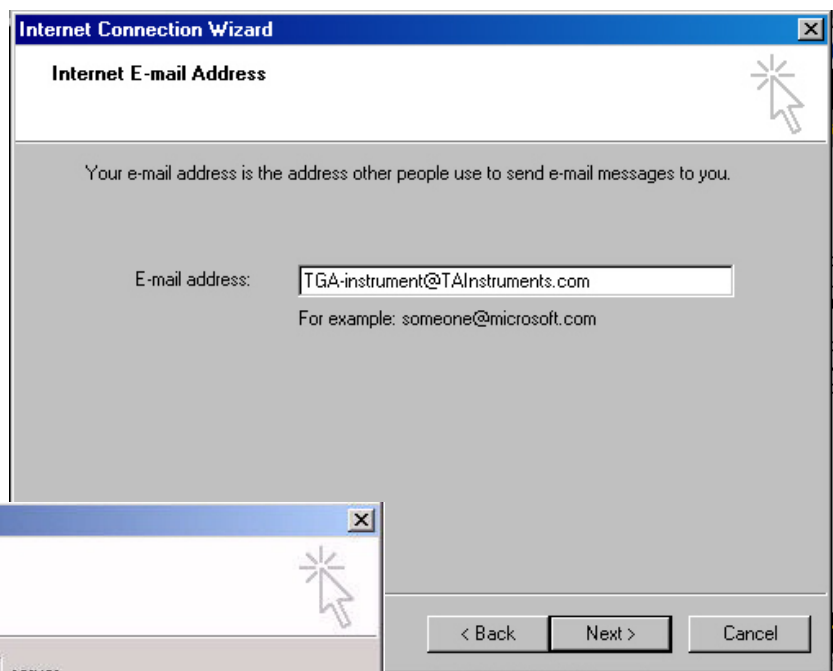
1. Open Outlook Express. Select **Tools/Accounts** from the main menu as shown in the figure to the right.
2. Set up a mail account by pressing the **Add** button then select **Mail** from the options shown. See the figure below.



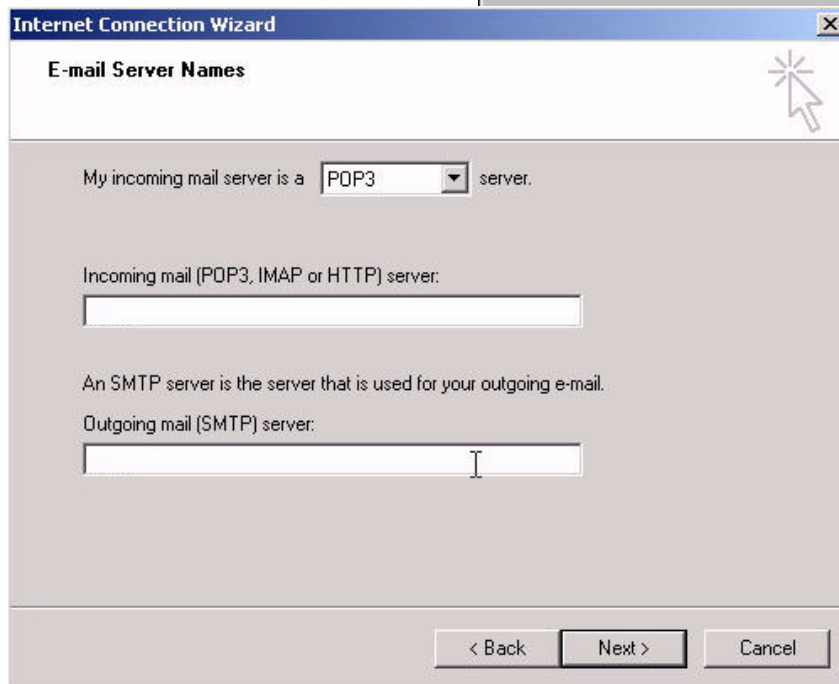
3. Enter the **Display name** that you would like shown to the recipients when mail is received from Q Series Advantage Mail as shown in the figure to the right. Click **Next**.



4. Enter the Email address your ISP or mail administrator has assigned to you. This must be in the form Someone@MyCompany.com as seen in the figure to the right. Click **Next**.
5. Select the **Incoming Mail Server** protocol type (incoming mail servers are usually POP3) then enter the name of the **Incoming Mail Server** (host name). Your ISP or mail administrator will provide you with this.



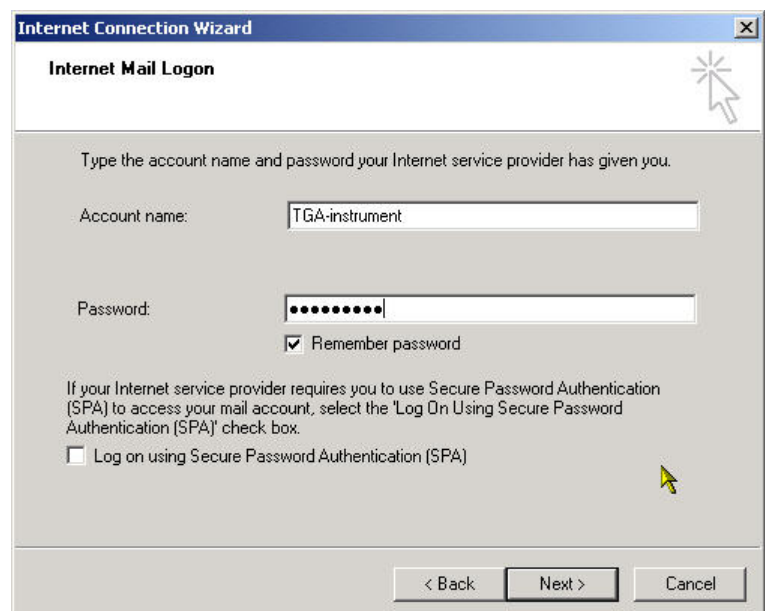
The screenshot shows the 'Internet E-mail Address' step of the Internet Connection Wizard. The title bar reads 'Internet Connection Wizard'. The main heading is 'Internet E-mail Address'. Below the heading, a text box explains: 'Your e-mail address is the address other people use to send e-mail messages to you.' There is a text input field labeled 'E-mail address:' containing 'TGA-instrument@TAlstruments.com'. Below this, an example is provided: 'For example: someone@microsoft.com'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.



The screenshot shows the 'E-mail Server Names' step of the Internet Connection Wizard. The title bar reads 'Internet Connection Wizard'. The main heading is 'E-mail Server Names'. Below the heading, there is a text box that says 'My incoming mail server is a' followed by a dropdown menu showing 'POP3' and the word 'server.'. Below this, there is a text input field labeled 'Incoming mail (POP3, IMAP or HTTP) server:'. Further down, there is a text box that says 'An SMTP server is the server that is used for your outgoing e-mail.' followed by a text input field labeled 'Outgoing mail (SMTP) server:'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

6. Enter the name of the **Outgoing Mail (SMTP) Server**. Usually the same as the incoming mail server name (your ISP or mail administrator will provide you with this). Click **Next**.

7. Enter the **Account name** and **Password** that you use to log into your mail service. The account name is usually the same as the first part of your email address. Check the **Remember password** box, if you do not want to enter your password every time you access your mail system. Click **Next** then click **Finish**.

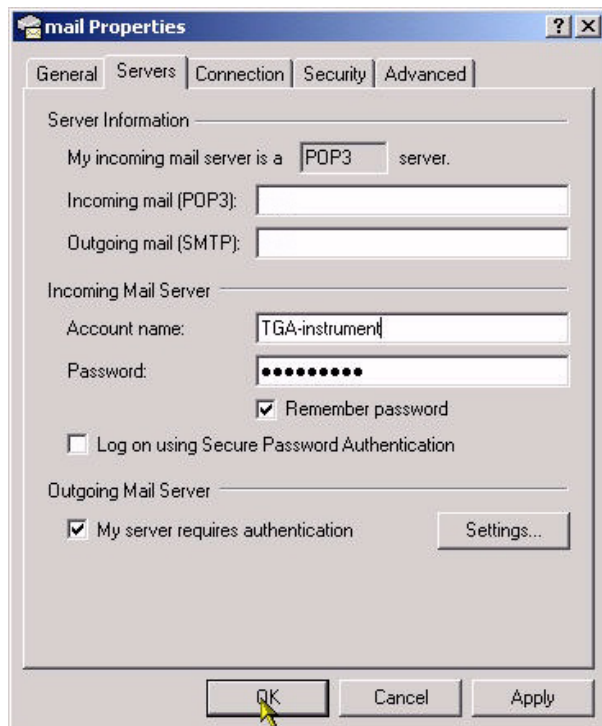
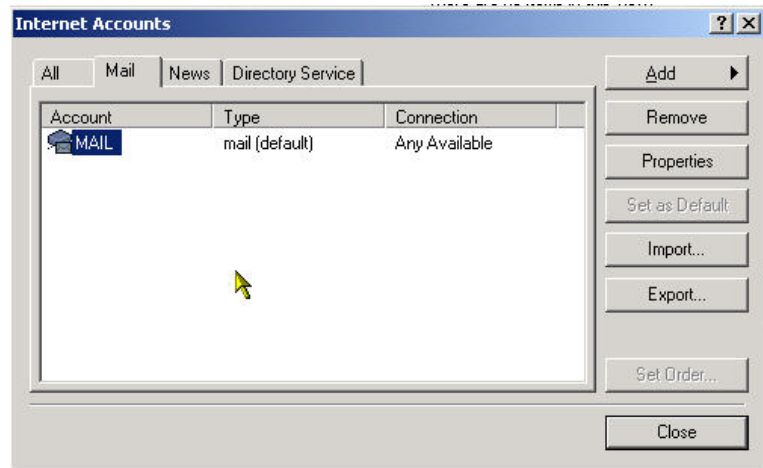


The screenshot shows the 'Internet Mail Logon' step of the Internet Connection Wizard. The title bar reads 'Internet Connection Wizard'. The main heading is 'Internet Mail Logon'. Below the heading, a text box explains: 'Type the account name and password your Internet service provider has given you.' There is a text input field labeled 'Account name:' containing 'TGA-instrument'. Below this, there is a text input field labeled 'Password:' containing a series of dots. Below the password field, there is a checked checkbox labeled 'Remember password'. Further down, there is a text box that says 'If your Internet service provider requires you to use Secure Password Authentication (SPA) to access your mail account, select the 'Log On Using Secure Password Authentication (SPA)' check box.' Below this, there is an unchecked checkbox labeled 'Log on using Secure Password Authentication (SPA)'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

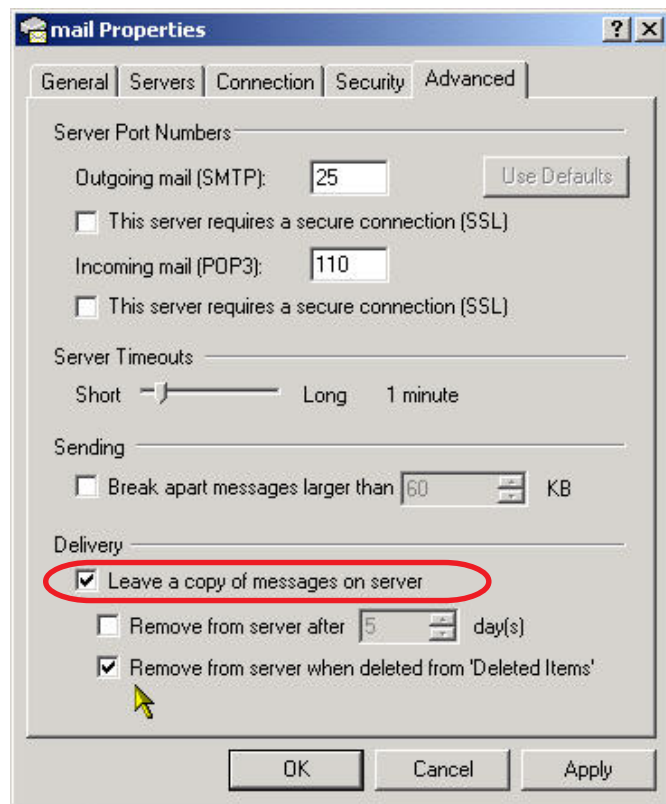
Setting Up Account Parameters

To set up your account parameters, follow these steps:

1. Open Outlook Express.
2. Select **Tools/Accounts** from the main menu as before.
3. Select the account to be modified and press the **Properties** button shown in the figure to the right.
4. Select the **Servers** tab as seen in the figure below. Since most outgoing mail servers require a valid account and password in order to send mail, ensure this access to the email account by checking the **My server requires authentication** box.



5. Select the **Advanced** tab. It is especially important, when using Outlook Express to access a Microsoft Exchange server. To do this, check the **Leave a copy of messages on server** box. See the figure below.



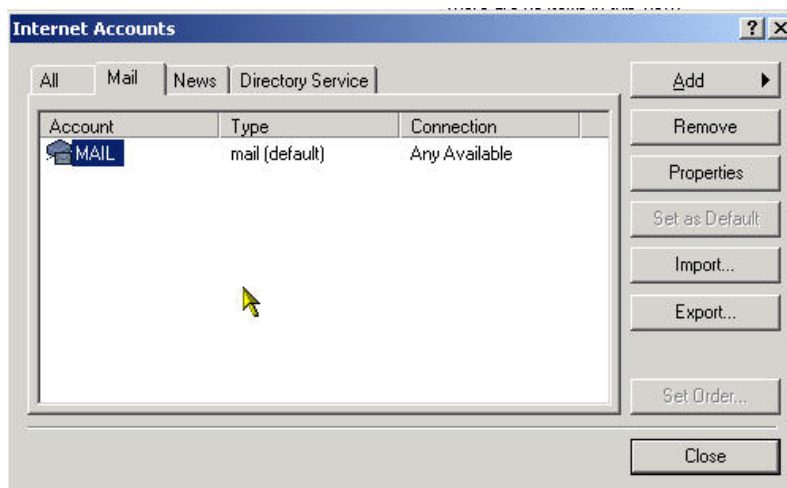
6. Test the newly configured account by sending a test message to another known good email account. If the message arrives successfully, your mail account is ready for use by Q Series Mail.
7. Proceed with "Configuring Platinum Mail and Messaging."

NOTE: If you want to edit your mail account parameters, the instructions are given on the next page.

Editing Account Parameters



If you wish to change any of your account parameters later, follow these steps:

1. Open Outlook Express.
2. Select **Tools/Accounts** from the main menu as before.
3. Select the account to be modified and press the **Properties** button.
4. Edit the information as desired.



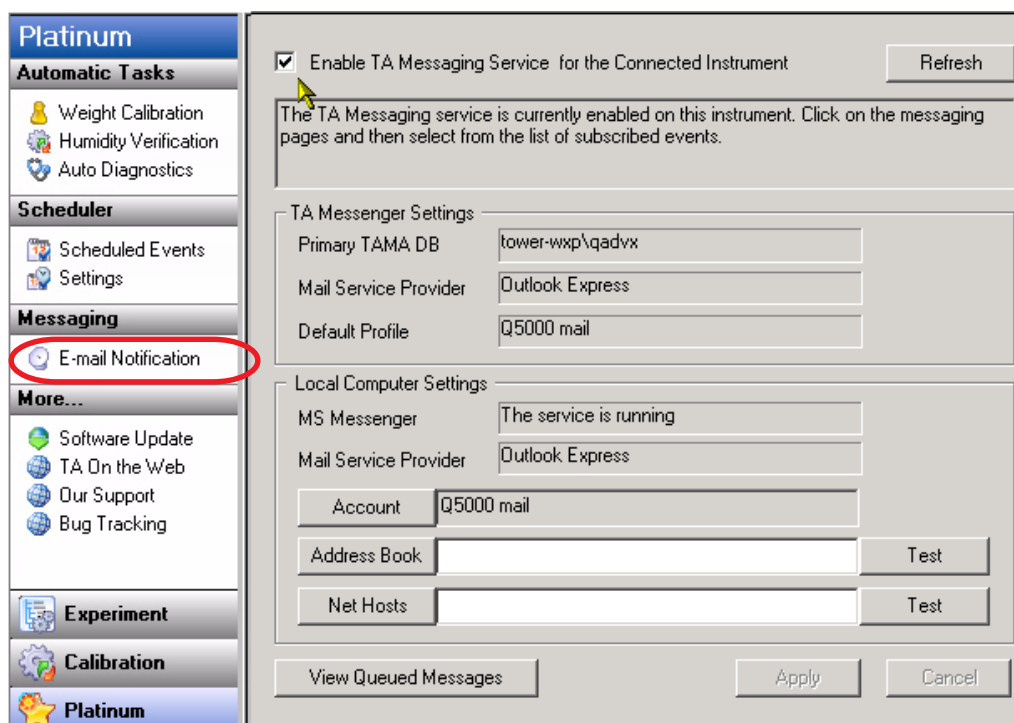
(3) Configuring Platinum Mail and Messaging Functions

After establishing the primary TAMA database connection and configuring Outlook for messaging, follow the instructions below to configure the Thermal Advantage Q Series Platinum mail and messaging functions.

1. Open the TA Instrument Explorer program by double clicking on the  icon on your desktop, if needed.
2. Double click on the instrument icon (e.g., ) on the Online Instrument view to connect to a selected instrument and automatically open the instrument control software for that instrument.

3. Click the **Platinum** button on the lower left side of the main window. Then click on E-mail Notification. See the figure to the right for an example.




4. Check **Enable TA Messaging Service for the Connected Instrument** to enable mail and messaging for this instrument.



5. Verify that the **TA Messenger Settings** displayed on the window are correct.
 - If there is no **Primary TAMA DB** shown, turn to page 1 and follow the instructions to set it up.
 - If the **Mail Service Provider** is not correct, right click on the Internet Explorer icon on your desktop then select **Properties** from the menu and select the **Programs** tab. Select the desired Email handler from the drop-down list and click **OK**. Click the **Refresh** button on upper right side of the **Platinum Email Notification** window and verify the changes.
 - If the **Default Profile** is not correct, open Outlook Express, select **Tools/Accounts** from the menu. Then select the **Mail** tab and set the desired profile to Default and click **OK** to exit the window. Click the **Refresh** button on the upper right side of the **Platinum Email Notification** window and verify the changes.
6. Verify that the **Local Computer Settings** displayed on the window are correct.
 - If the **MS Messenger** service is desired and the service is stopped or disabled, follow the instructions on page 3, "Setting Up the Windows® Messenger Service." Then click the **Refresh** button on the upper right side of the **Platinum Email Notification** window and verify the changes.
7. Use the **Address Book** and **Net Host** buttons to select the email recipients and computer names which will receive test messages. You can also type the email addresses and host names in the fields, if desired. Separate multiple entries with a semicolon (;). Press the associated **Test** button to send a test message to the selected email account or computer.
8. Press the **Apply** button to save the entries as the defaults, if desired.
9. Test the mail and messaging services as directed on the next page.

(4) Testing Platinum Mail and Messaging Functions

Follow the instructions below to test all of the functions that you have set up to make sure everything is properly installed.

1. Perform the following steps, if Thermal Advantage is not already running:
 - a. Open the TA Instrument Explorer program by double clicking on the  icon on your desktop, if needed.
 - b. Double click on the instrument icon (e.g., ) on the Online Instrument view to connect to a selected instrument and automatically open the instrument control software for that instrument.
2. Go to **Experiment View** by clicking on the  button, if needed.
3. Set up a short (one to two minutes), isothermal-only experiment.
4. Click on the **Messaging** tab.
5. Select the **Subscribed Events**: "Data file receiving complete." This event will send notification when the experiment has been completed.
6. Enter any **Additional Comments** to be included in the message.
7. Click on the **E-mail To** button to select the desired addresses for this option, if email notification is desired. Alternatively, you can enter these addresses (separate each address with a semi colon).
8. Click on the **Message To** button to select the desired computer for this option, if Windows Messaging notification is desired. Alternatively, you can enter a computer name(s).
9. Click the **Apply** button to save the settings already chosen.
9. Click on the **Attachments** button, select PDF to specify to include an Adobe PDF file with the message. **(NOTE: No spaces can be used in the directory or file names.)**
10. Check the **Apply settings to all checked events** box, if you wish to apply all of these settings for all the subscribed events selected.
11. Check the **Apply settings to all runs** box, if you wish to apply these messaging settings to all the runs in the sequence.
12. Click **Apply** again when finished.

Check to make sure that the message/mail arrives at the chosen destination. If it does not, double check that the procedures stated in this document have been carefully followed and repeat any instructions, if needed. For additional help, contact TA Instruments.