

# QualityWindow

The continuous improvement software



## Quality Window Email Notifications

**Administration Guide**

May 6, 2024

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## Overview

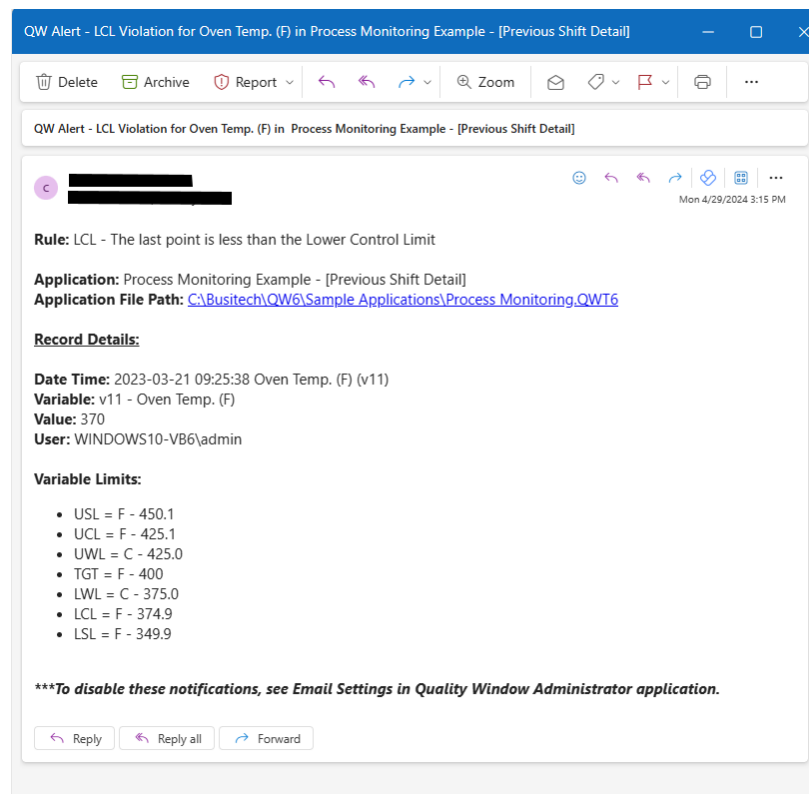
In Quality Window 6.1, Busitech has introduced a new notification feature for its users. This feature enables Quality Window to send out email notifications to a specified audience when data entered in a QW Application violates a defined rule. This is intended to serve as an early warning tool, alerting stakeholders when their processes may have issues that need addressing. A common use case would be to send out a notification when a product is being manufactured and a specific aspect falls out of specification. This allows organizations to react quickly and minimize losses due to improperly manufactured products or misaligned processes.

## How it works?

The email notification feature requires a configuration of Quality Window to send emails through an organization's email servers when pre-configured variable rule is violated. Rules are violated when a record is added in a QW Application that has a variable (column) value that triggers an attached rule that indicates the value is of concern and is outside of expected value.

Administrators can control what rules trigger emails. Administrators can also control which variables in QW Applications have rules applied to them that will send email notifications.

### Example Email:



## Configuring Email Notifications

Follow these steps to properly configure your organizations email notifications.

### Requirements

Before trying to enable Email notifications, you must first ensure you can meet the requirements for this feature.

#### Quality Window 6.1 or greater

The Email notification feature was introduced in Quality Window version 6.1 and is not available in previous versions.

#### Mail Server Settings and Credentials

Quality Window requires customers to provide their own mail server settings to send emails. This requires you to inquire with your IT organization and acquire the following information:

<b>Email Server address</b>	Sometimes called an SMTP server address these addresses are like web addresses but are for mail servers. <b>Example:</b> smtp.domain.com
<b>Port</b>	Mail servers have specific ports they listen. This a number between 0-9999. <b>Example:</b> 5555
<b>Username</b>	This is the mail server username
<b>Password</b>	This is the mail server password associated with the username

If your IT team is unwilling to allow you to configure Quality Window to send emails through your organizations email server, this will be a blocker for you to use this feature. Busitech can offer no solution to circumvent your IT policies.

#### Distribution Group

The QW Email Notification feature does allow email to be sent to a multiple email addresses, though Busitech recommends to customers to set up a email distribution group in your email organization's system to make it easier to edit email audiences across many rules.

**Example:** [OutOfSpec@mydomain.com](mailto:OutOfSpec@mydomain.com)

#### From Email address

Provide an email address that the email notifications should come from.

## Configuring Quality Window Email Notifications

Configuring email notification is easy and requires the following steps:

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1. Validate Shared Configuration
2. Configure email settings in QW Admin
3. Test email settings in QW Admin
4. Configure Rules
5. Apply rules to application variables that notifications are required.
6. Test

### Validate Shared Configuration

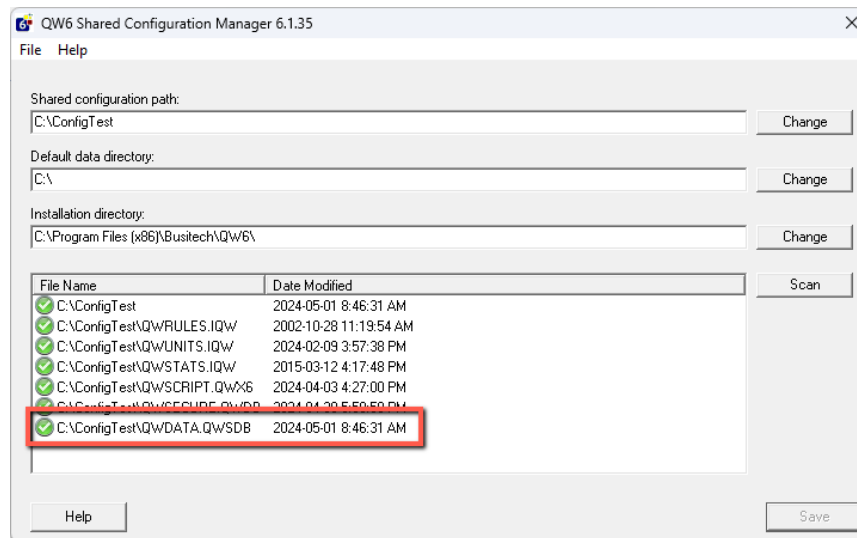
The first step is to configure Quality Window Email Notifications (QW Email Notifications) is to provide your organizations Mail server details. This will ensure that these settings will be shared by all Quality Window Client devices.

#### Steps:

1. Open QW Admin
2. Open Shared Configuration



- a.
3. Validate that the shared configuration is setup properly and the QWData.QWSDB is showing a green checkmark.



- a.
4. If the green checkmark is not showing for the QWData.QWSDB, just open the email settings console and close it to automatically create this file.



- a.
5. To learn more about configuring your Shared Configuration please see the following resources:
  - a. Video Tutorial - [Shared Resources](#) Manager

- b. PDF Guide - [Distributing Shared Resource Files to all Workstations on a network](#)

## Configure email settings in QW Admin

Configuring your email settings in QW Admin requires the following details from your email server, available through your IT Department.

<b>Email Server address</b>	Sometimes called an SMTP server address these addresses are like web addresses but are for mail servers.  <b>Example:</b> smtp.domain.com
<b>Port</b>	Mail servers have specific ports they listen. This a number between 0-9999. <b>Example:</b> 5555
<b>Username</b>	This is the mail server username
<b>Password</b>	This is the mail server password associated with the username

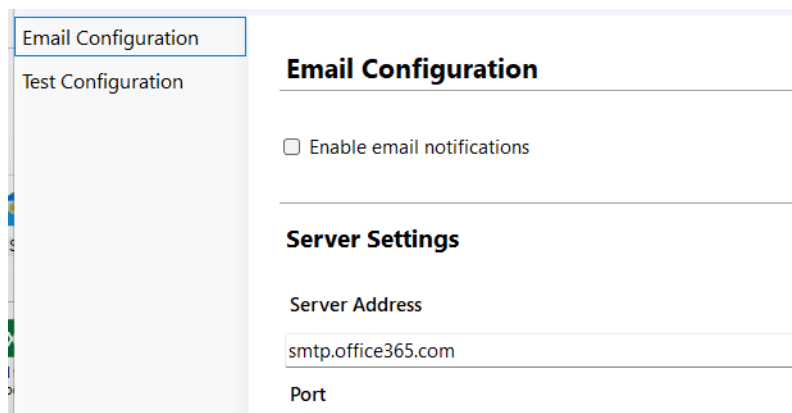
*NOTE: For this initial version of Quality Window, Simple SMTP Authentication is the only supported method. OAuth and other Authentication methods are not supported currently. If you require these settings, please contact [Busitech Support](#).*

### Steps to configure Email Settings:

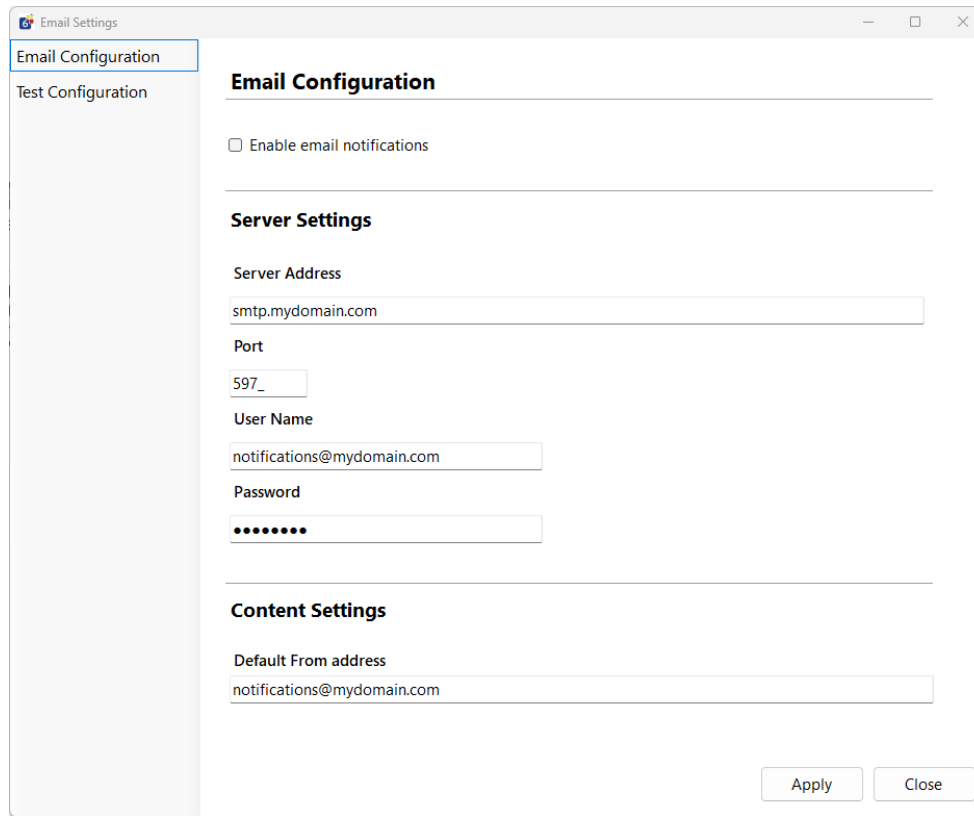
1. Open QW Admin then open Email Settings console



2. Click Email Configuration on the left menu bar.



3. Enter Server Settings and Content Settings fields.



The screenshot shows the 'Email Settings' window with the following sections:

- Email Configuration:**
  - Enable email notifications
- Server Settings:**
  - Server Address: smtp.mydomain.com
  - Port: 597\_
  - User Name: notifications@mydomain.com
  - Password: [Redacted]
- Content Settings:**
  - Default From address: notifications@mydomain.com

Buttons: Apply, Close

4. Click Apply to save.

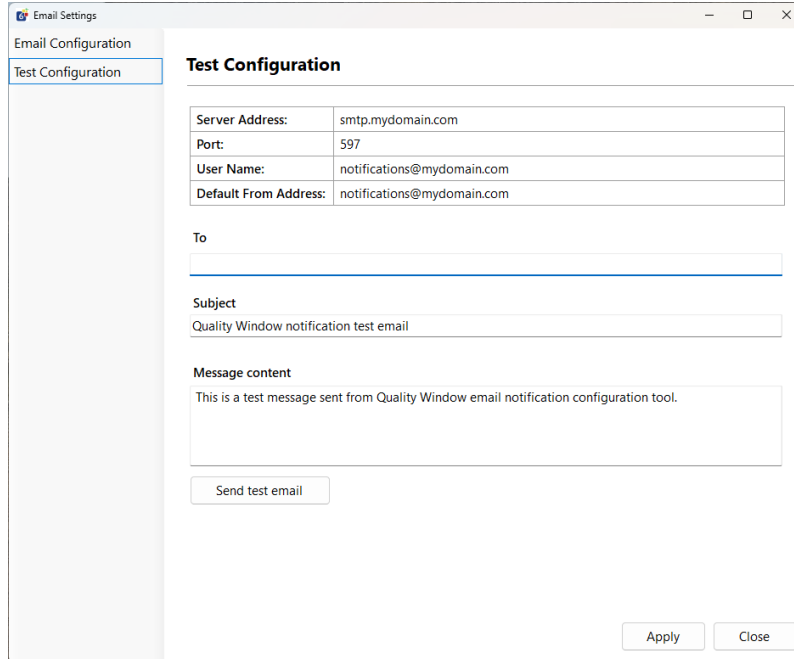
## Test Email Settings

After configuring your Email server settings, Busitech recommends that you test your settings before configuring rule.

To Test your current settings, click the “Test Configuration” on the left menu bar and fill in the ‘To’ field and edit the ‘Subject’ and/or ‘Message Content’ as needed.

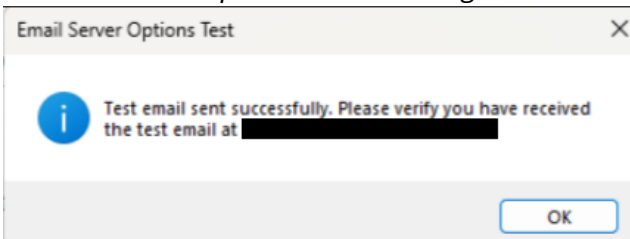
1. Click “Send Test Email” button to initiate the test of the current settings.

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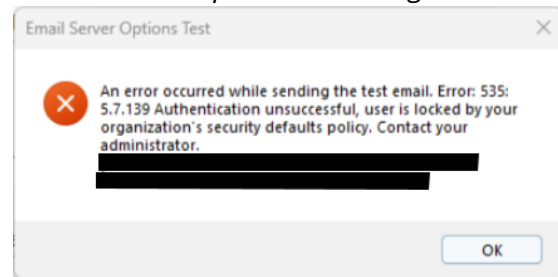


2. A message box will display after the test is completed with the results from the Quality Window perspective.

### *Example Success Message*



### *Example Error Message*



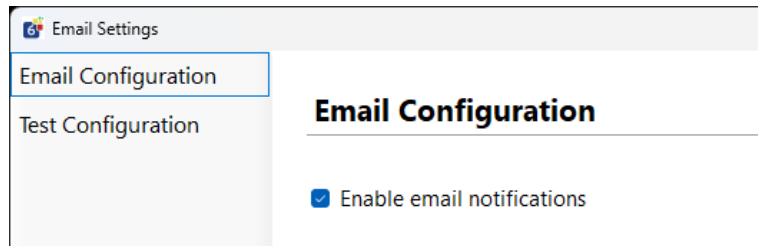
3. After receiving a success message, verify that email is received. Once you confirm receipt of the email move onto the next step.

\*NOTE: You may receive a success message but still have the test email not delivered. In these cases, talk to you Email Administrator or IT team to diagnose issues with your configuration as Quality Window succeeded in passing the message to the email server.

## Enable Email Notifications

The last configuration step for email settings is to enable the email notifications, this is simply done by ensuring the checkbox for “Enable Email notifications” is checked on the Email Configuration tab. Enabling will not immediately start sending email notifications, notifications still need to be applied to specific rules which will be covered below in the next section.





*Enable email notifications checkbox.*

## Configure Rules

Quality Window Rules have been upgraded to permit optional email configurations. As a reminder, rules are defined in a central location and can be applied to any QW application. Rules are warning mechanisms to notify users that a value entered is of concern and an alarm will be triggered. This is called a Rule Violation and now can initiate an email notification to pre-defined stakeholders.

The email notification can be enabled on a per rule basis. Each rule can have a different notification configuration.

For more information on rule definitions see these resources:

- Video Tutorial: [Rules Administration](#)
- Video Tutorial: [Alarm Screen](#)
- PDF Guide: [Need a little help getting started – Page 15](#)

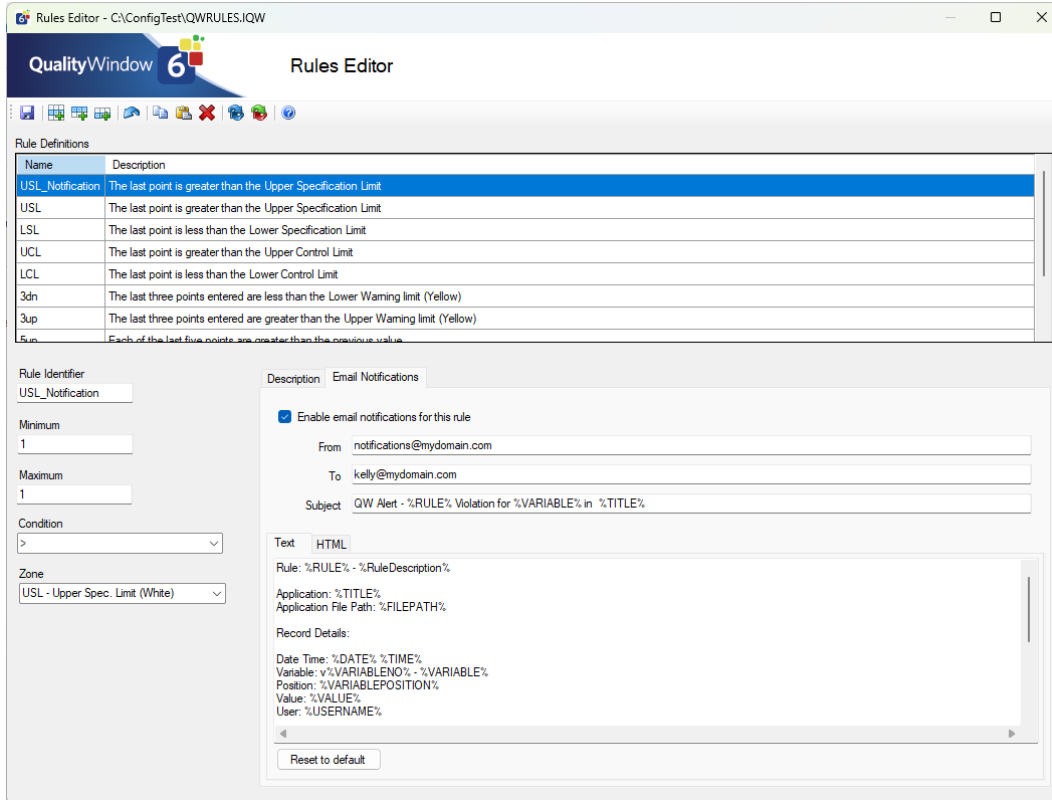
## Configuring a Rule Email Notification

1. To configure a Rule Email Notification, open the Manage Rules Console in QW Admin.

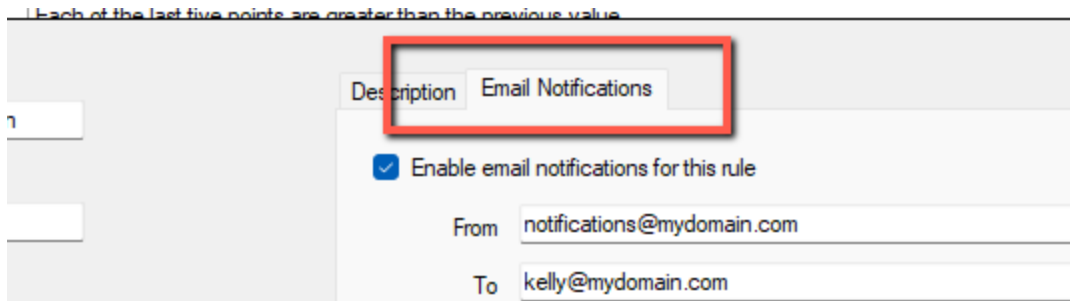


2. Select, a Rule to configure an Email Notification (You can also create new rules, copy existing rules)

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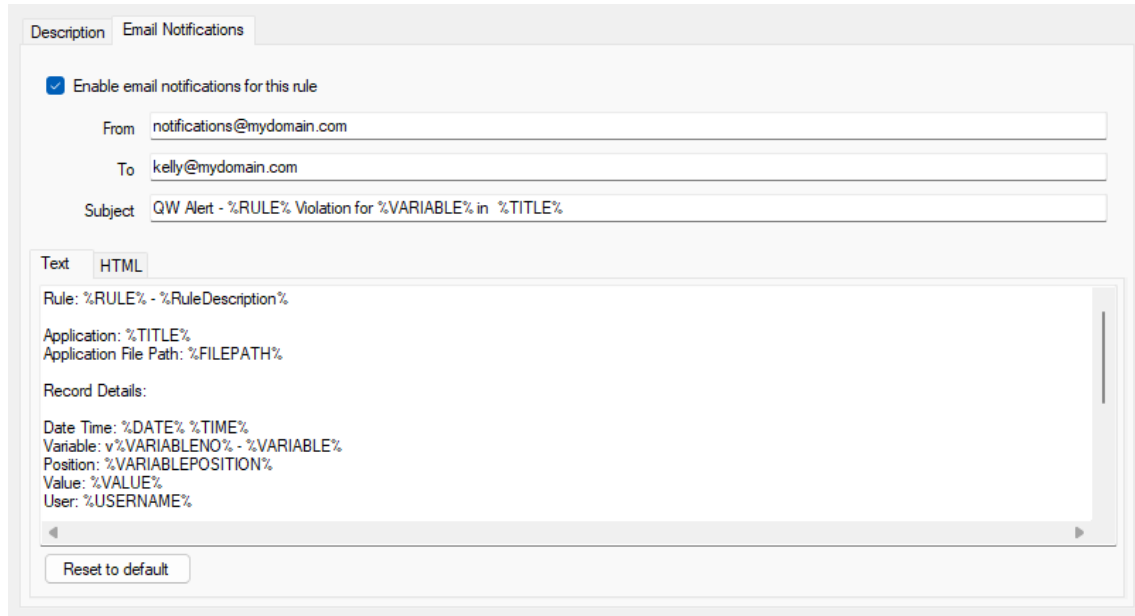


### 3. Click the 'Email Notifications' Tab



### 4. Edit fields as required. See below for details on each field and supported replacement codes.

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**Table of Email Notification Properties**

<b>Enable email notifications for this rule</b>	When checked, will send an email when this rule throws an alarm.
<b>From</b>	From email address, defaults to the default from address configured in Email Settings – Content Settings.
<b>To</b>	To email address separate addresses with semi colons. Maximum 5 emails addresses are supported. If you need more, create a distribution email group.
<b>Subject</b>	Email subject value. Supports replacements codes. See replacement codes section below for reference.
<b>Email Content Text/HTML</b>	The body of the email. Can define two distinct messages based on if you want HTML or Text. It is recommended to fill in both. Supports replacements codes. See replacement codes section below for reference. Default Text demonstrates replacement codes.
<b>Reset to Default button</b>	Resets all values in this grid to default values.

### Supported Replace codes for Email Notifications

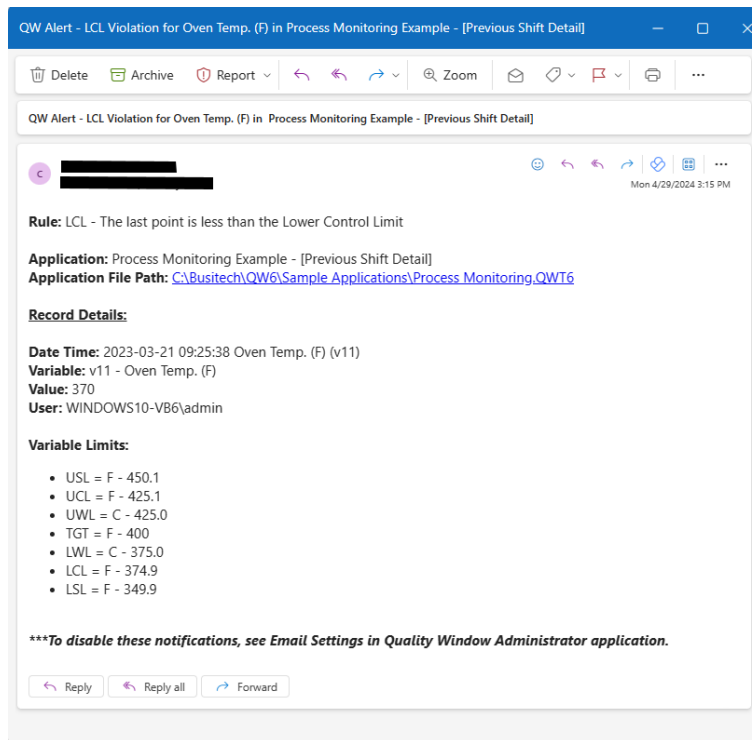
The list below is a list of all supported replacement codes. These codes will be replaced with values based on the rule that was violated and the record that violated the rule.

<b>%RULE%</b>	The Identifier property of the Rule that triggered the notification.
<b>%RULEDESCRIPTION%</b>	The description property of the Rule that triggered the notification.
<b>%FILEPATH%</b>	The file path and name of the application that triggered the notification.
<b>%TITLE%</b>	The title of the application that triggered the notification Includes [View Name] if applicable.
<b>%VARIABLE%</b>	The name of the variable that triggered the notification.

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<b>%VARIABLENO%</b>	The variable index or position in the application that triggered the alarm regardless of selected view.
<b>%VARIABLEPOSITION%</b>	The index or numeric position of the variable in the Logsheet or current view.
<b>%VALUE%</b>	The value that triggered the notification.
<b>%DATE%</b>	The date portion of the Logsheet record that triggered the notification.
<b>%TIME%</b>	The time portion of the Logsheet record that triggered the notification.
<b>%USERNAME%</b>	The user that entered the data that triggered the notification.
<b>%UCL%</b>	The Upper Control Limit of the variable that triggered the notification.
<b>%LCL%</b>	The Lower Control Limit of the variable that triggered the notification.
<b>%USL%</b>	The Upper Specification Limit of the variable that triggered the notification.
<b>%LSL%</b>	The Lower Specification Limit of the variable that triggered the notification.
<b>%UWL%</b>	The Upper Warning Limit of the variable that triggered the notification.
<b>%LWL%</b>	The Lower Warning Limit of the variable that triggered the notification.
<b>%TGT%</b>	The Target limit value of the variable that triggered the notification.

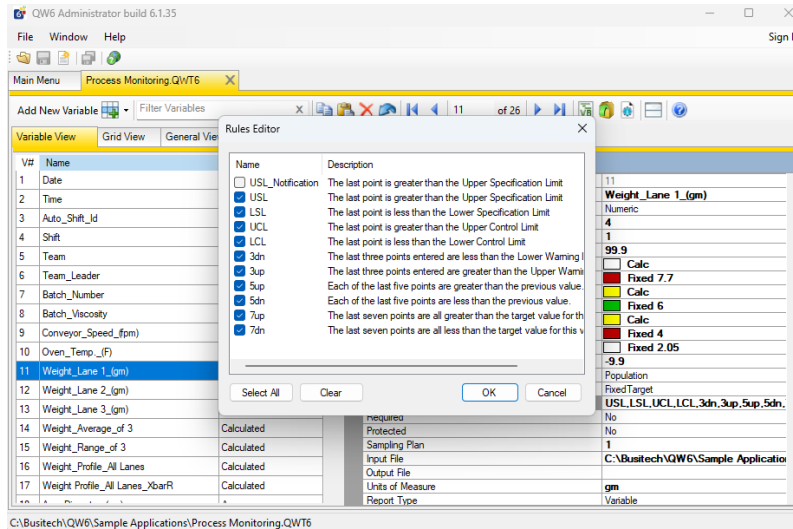
### Example Notification



## Apply Rules to QW Applications

The final configuration step is to ensure your rules are applied to the right QW Application and variables. This is done by opening QW Applications in QW Admin – Manage Applications that you want to enabled notifications on and ensure the variable(s) have appropriate rules configured.

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*Example Manage Applications*

See

My Rules are enabled on most of my variables, but I do not want notifications for all of them.

In Quality Window version 6, Rules are not enabled on variables by default, but in previous versions of Quality Window, Rules were automatically assigned to variables. This could create a scenario where too many QW applications have existing rules assigned to variables and an unwillingness to send notifications to a broad set of applications. In this case, Busitech recommends that administrators copy existing rules they want receive notifications from and apply the new rule to only the QW Applications they wish to receive notifications from.

Rule Definitions	
Name	Description
USL_Notification	The last point is greater than the Upper Specification Limit
USL	The last point is greater than the Upper Specification Limit

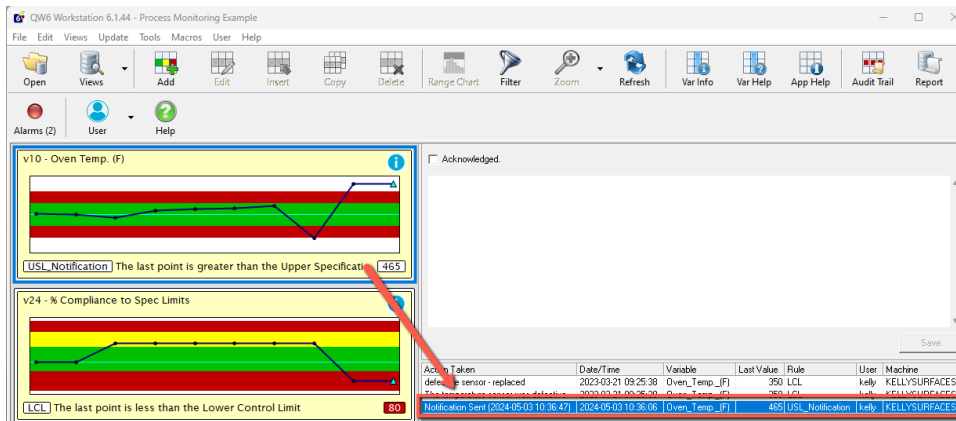
*Example of a distinct Upper Spec Limit Rule with Notifications*

## Validating Notifications

As with any change, testing is key to ensuring that the system works as expected. Below are the tests that Busitech recommends validating your notifications.

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1. Ensure that a QW Application has a Rule enabled on a variable that has email notifications defined and enabled.
2. Add a record to the QW Application that will trigger the Rule and create an alarm entry.
3. Once alarm screen is displayed confirm that a log entry has been added indicating the email notification is sent



Example Alarm Screen view with notification log entry

The temperature sensor was defective	2023-03-21 09:25:38	Oven_Temp_[F]	350	LCL	kelly	KELLYSURFACES
Notification Sent (2024-05-03 10:36:47)	2024-05-03 10:36:06	Oven_Temp_[F]	465	USL_Notification	kelly	KELLYSURFACES

Example notification log entry

4. If log entry doesn't exist, confirm that your variable(s) has the rule enabled then verify your rule configurations. Once you find your issue try again.
5. If the log entry does exist, ensure that an email was received.
  - a. If email wasn't received verify the following:
    - i. Check your Junk/Spam Folder for the email.
    - ii. Check Sent mail folder for the configured 'from' address of the notification email.
    - iii. Verify Rule Configuration
      1. To Address
      2. From Address

If all steps do not resolve your issue, contact [Busitech Support](#).