



Installation and Initial Setup Guide

This guide will walk through an Info-Alert installation and give basic setup and implementation steps.

Use the *Info-Alert Administrator's Guide* for additional details and features.

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Info-Alert Installation (Basic Requirements)

- **Server Installation:** Windows 2003, 2008 with latest service packs. Info-Alert is an automatic data monitoring system that should be installed on a machine that is always running. **RECOMMENDED:** 'Full' IA installation on a compatible server.
- **Workstation Installation:** IA can be installed on Windows XP Pro, Vista Pro/Business, Windows 7 with latest service packs. **RECOMMENDED:** 'Full' IA installation on a workstation for Demo and Alert Development.
- **SQL 2008 instance:** IA uses Microsoft SQL as its database platform. **RECOMMENDED:** Install the SQL Express 'InfoAlert' instance from IA CD found using the 'Pre-Requisites' section of the Installation Menu. (An existing SQL 2005 or 2008 instance may also be used, but not recommended).
- **Microsoft Access 2007:** Is required for Info-Alert to operate and a runtime version of Access 2007 can be installed from IA CD found using the 'Pre-Requisites' section of the Installation Menu. **RECOMMENDED:** Runtime version is adequate for typical pre-defined alert use. If custom alerts or Action Templates are being used, a Full version of Access 2007 with SP1 should be installed. **ACCESS 2003 also compatible.**
- **Office 2003 Service Pack 3:** (If Access 2003 is being used) This service pack adversely affected some objects in Access that IA utilizes, such as check boxes and pull downs. If this SP is installed, the Microsoft hot fix KB945674 must also be installed. **RECOMMENDED:** Apply Office 2003 SP3 and KB945674 if Access 2003 is installed.
- **Administrative Permissions:** Installation of IA on a Server or Workstation OS requires FULL admin permissions.

Installation

Install IA Server and Alert Manager (Full):

Verify that the installation requirements from the previous page have been met otherwise the IA installation wizard may be unable to complete the installation.

Insert the Info-Alert Installation CD which will automatically start the initial Info-Alert 'Main Installation Menu'.



View Website to get additional product information and support bulletins

Browse CD to view additional files available on the IA CD in the CDEExtras and CDService directories.

IA Installation Guide can easily get you back to this guide for future reference.

Adobe Reader provides a quick link to the Adobe Reader download site. A PDF reader will be needed on the Info-Alert machine to view any documents created by IA with this format.

Hover over any of the menu buttons to view a brief description and important install tips.

SQL Express and Access Pre-Requisites:

Info-Alert requires both Microsoft SQL Server 2008 and Access 2007 to be installed and properly running with the latest service packs. This installation CD provides for an InfoAlert SQL 2008 Express instance and an Access 2007 runtime edition installation to fulfill these pre-requisites. You may use an existing SQL 2008 (or 2005) instance and Access 2007 (or 2003) application if already available, although installing a separate SQL instance from the IA install menu is recommended. See NOTE below.




Choose SQL 2008 Express from the install menu to launch a non-interactive SQL Express instance installation using the following authentication:

IA SQL Server Instance Name: *machinename\INFOALERT*

SQL User: SA

Password: InfoAlert200% (Case Sensitive)

If a manual installation of SQL Express is required, please use the SQL Express Install Guide included at the end of this document.

-  **NOTE:** Even if you have a full instance of SQL Server 2005/2008 running, we **highly** recommend using the separate SQL 2008 Express instance to allow for product isolation and ease of installation, removal and support. Microsoft SQL Studio Management Tools will NOT be installed by default, but can be added if desired at a later time.
-  **TIP:** Microsoft SQL 2008 may require multiple pre-requisites of its own. Many of these are included in the 'Service' folder found on the IA installation CD and all can be downloaded from the Microsoft Downloads website.
-  **NOTE:** SQL 2008 Express installed from the IA CD will always be installed to 'C:\Program Files\Microsoft SQL Server\MSSQL10.InfoAlert' and an 'InfoAlert' instance will be created. If the Info-Alert application is removed for any reason, you will need to manually remove this instance using 'Add/Remove Programs'. If you will be **re-installing** an IA 33a0x version that can utilize the existing SQL 2008 Express InfoAlert instance, any existing IA database and subsequent files will be removed during the *First Time Attachment (FTA)* process.

If you have determined that MS Access runtime will need to be installed on this machine:

Choose the MS Access 2007 Runtime button. When installation is successful you may be asked to reboot the machine. If so, you can re-start the IA Installation Menu to continue.

Now that the Microsoft SQL and Access prerequisites have been met, please continue with the installation of Info-Alert.

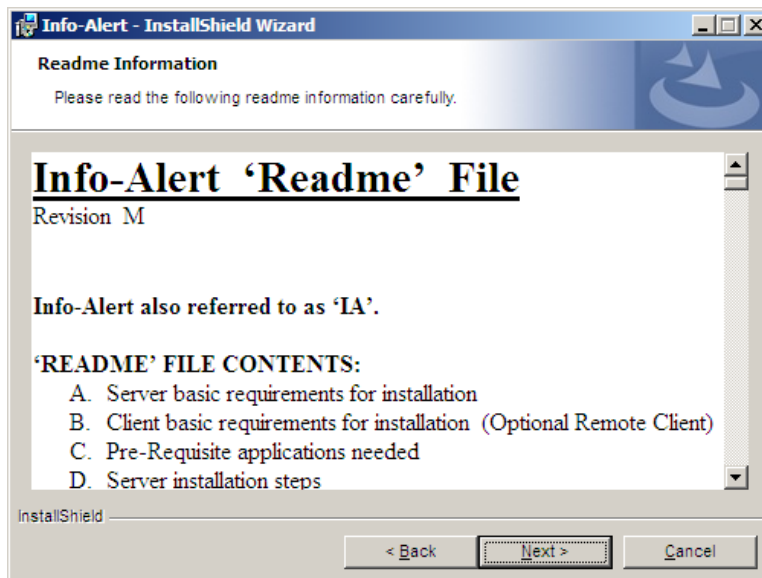
Install Info-Alert:

IA Version 3.3.x.x is compatible with Windows 2003/XP, Windows 2008/Vista, and Windows 2008 R2/Windows 7 platforms.

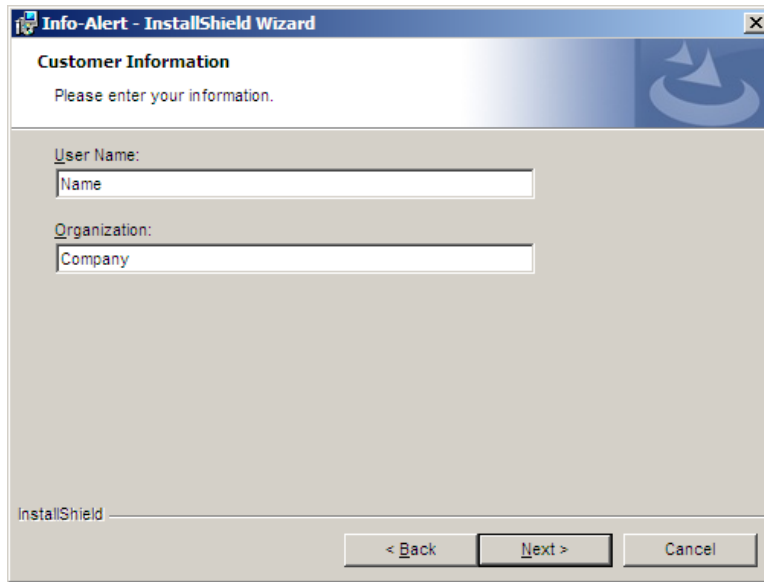
Choose **Install Info-Alert (Full)** to begin your Info-Alert full installation. Click **Next**, after viewing the initial welcome screen.



Click **Next**, after reading and accepting the licensing agreement.

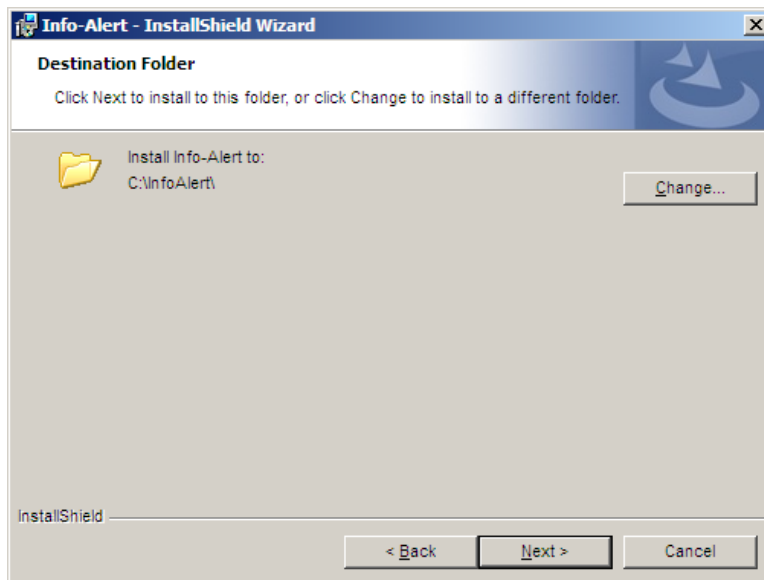


Click **Next**, after viewing the 'Readme' File.



Enter User and Company information.

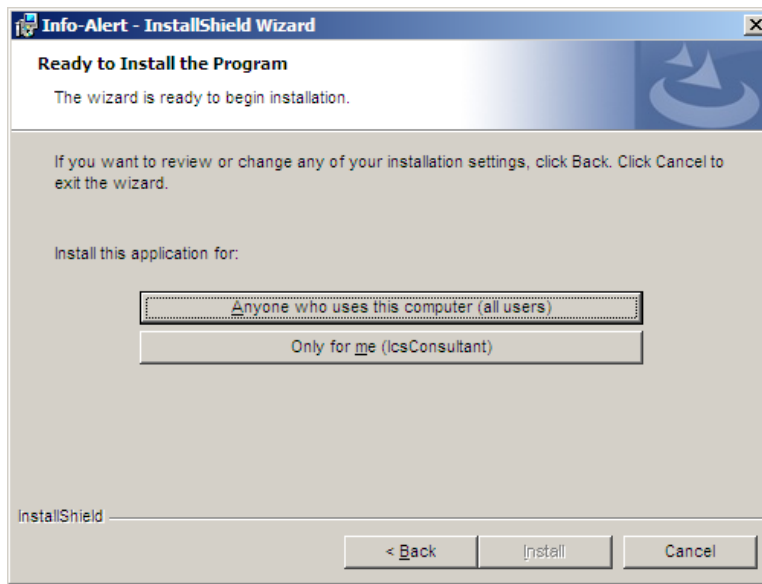
Click Next.



You may want to install IA on a drive other than the default C: drive to use any free space that may be available. Click the Change button to browse available drives.


OR

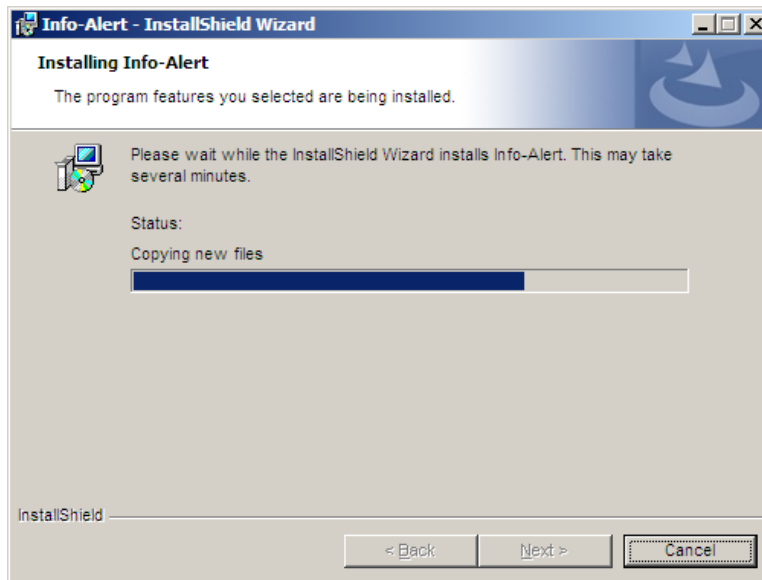
Click Next to accept the default location: '**C:\InfoAlert**'. IA must have full admin rights to the installation directory selected.



Review the installation settings, using the Back button to make any changes.

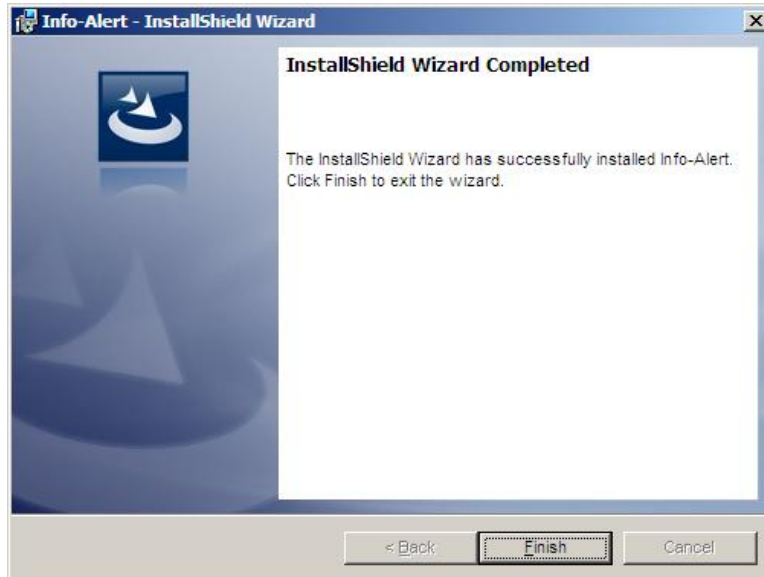
Choose the preferred Profile Selection or Click Install to continue.

 **NOTE:** Typically, IA would be installed for ‘All’ users or ‘Anyone’.



Please be patient during the ‘Installation Progress’ screen as Info-Alert may take several minutes to install depending on your machine’s resources.

Click Next, when progress complete.



Click ***Finish*** at the ‘Completion Screen’.

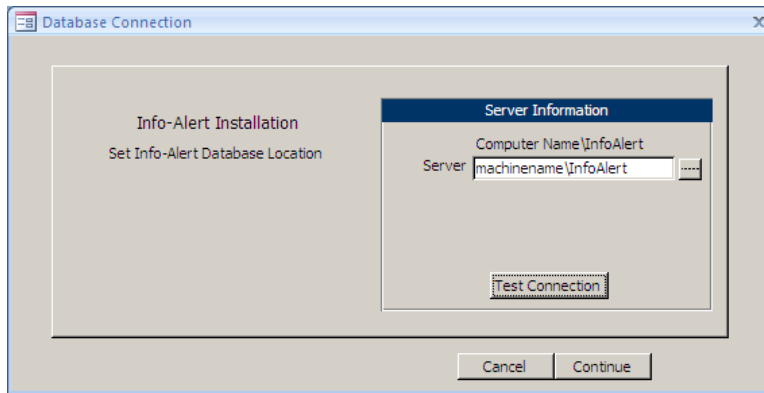
- NOTE: The installation of some IA components may require a reboot after completion. If this is the case, a message will appear prompting you for this reboot. You can close the IA Installation Menus and select ‘Yes’ to reboot.

IMPORTANT NOTE:

After a successful installation you will find the Info-Alert icon on your desktop. LAUNCH THIS SHORTCUT TO CONTINUE THE INSTALLATION AND THE ‘FIRST TIME ATTACHMENT’ (FTA) WIZARD.

'First Time' Attachment Wizard (FTA):

Click the new 'Info-Alert' icon on your desktop to initiate the FTA (*First Time Attachment wizard*).



Server Information will default to the Server name of the SQL 2008 Express IA instance installed as a pre-requisite during installation, or fill-in the name of an existing SQL server 2008/2005 instance.

EXAMPLE: *machinename\InfoAlert*

Select **Test Connection** to receive a successful connection message to the 'Master' database in this SQL instance.

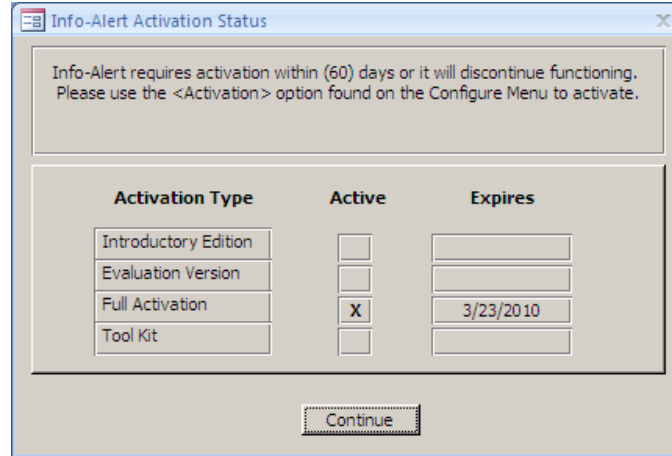
Select **Continue** to move forward with the Info-Alert data base attachment.

At this point the **FTA (First Time Attachment)** wizard will create and attach the IA database, deleting any existing Info-Alert databases that might exist from a previous install.

The **IA** and **Sample** data maps (WFI files) will be automatically imported along with any *custom* maps configured to import during installation by your *IA Alert Developer* using the custom.WFI file. See the *IA Administrator's Guide* for more details.

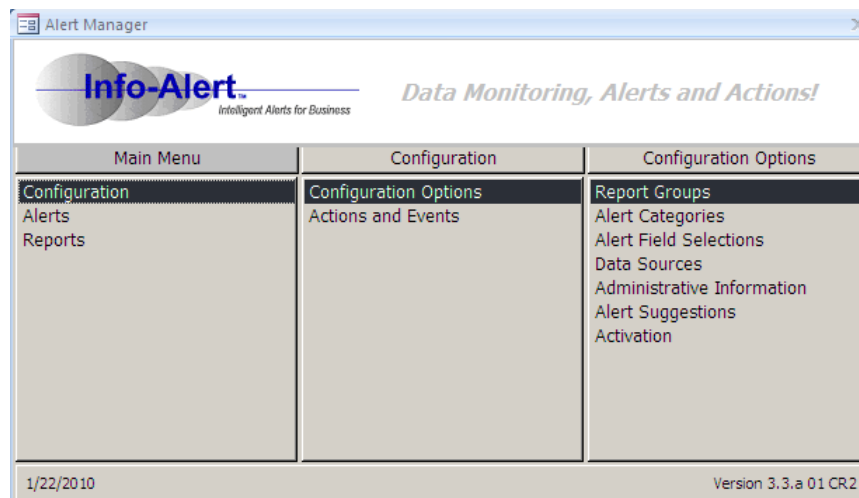
NOTE: If IA was unable to attach the IA database to the specified SQL 2008 instance you should verify the following: Does the IA user have 'full' rights to the InfoAlert directory? If IA was previously installed on this machine, was the previous InfoAlert database properly deleted from the SQL InfoAlert instance?

NOTE: Subsequent Alert Manager logons will default to 'Trusted', but you can also logon with User Id: *sa* and the password that was set at installation (By default: InfoAlert200%). You can change the password using the 'Misc' tab on the 'Admin Info' screen.



The ***Activation Status*** form now appears. By default Info-Alert is installed in an 'Evaluation mode' that allows for a 60 day grace period to activate IA. You have full access to IA Manager in this mode. The Info-Alert tool Kit will also be available in Eval mode but is limited to access of the 'Sample' data map only.

Click ***Continue*** to show the Info-alert 'Main Menu'.



Info-Alert is now installed and ready to be configured!

Initial Setup

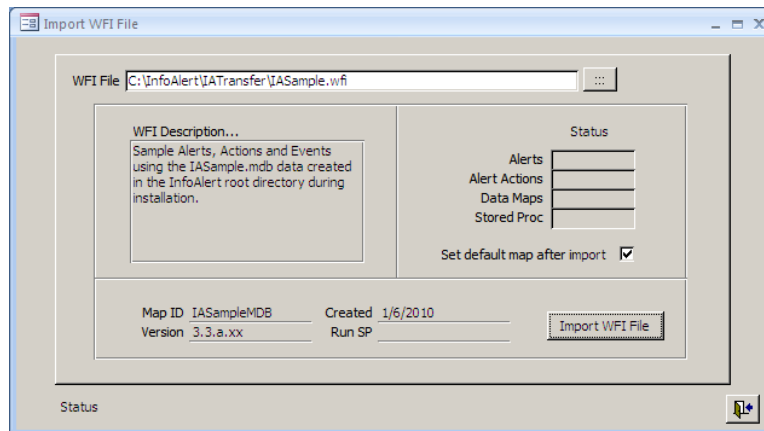
Initial Setup of Info-Alert:

Welcome to Info-Alert. The remaining steps shown here will walk you through the basic configuration needed to successfully setup and receive an alert notification from your pre-defined alert package (if available). **These examples use the 'Sample' data and Alert set included with Info-Alert.**

Import WFI File:

One of the first setup tasks is to import the appropriate WFI or Work Flow Intelligence file that is applicable for our intended source database. This WFI file is normally provided by your Info-Alert reseller and should be available on the IA install CD, or provided to you on a separate CD. In some cases the **Custom WFI** install feature is used during initial IA installation and the indicated pre-defined alerts may already be available in the **Select Alerts** screen. The WFI file is what makes this installation of Info-Alert specific to your source database and will install all the pre-defined alerts that have been created for use with a specific data source. Check the **Select Alerts** screen to if the appropriate alerts are installed.

We can easily install a supplied *pre-defined alert package*, or update an existing one, by using the **'Import WFI'** screen located in the **Main Menu** under **'Alerts – Processing'**



Browse to the location of the supplied WFI file, in most cases located in the **CDEExtras** folder of the **IA installation CD**. Use the **Description**, **Map ID** and **Version** entries to verify the WFI file being imported.

Click **Import WFI File** button when ready to continue.

The import progress will be presented and a 'successful' message will appear when complete.

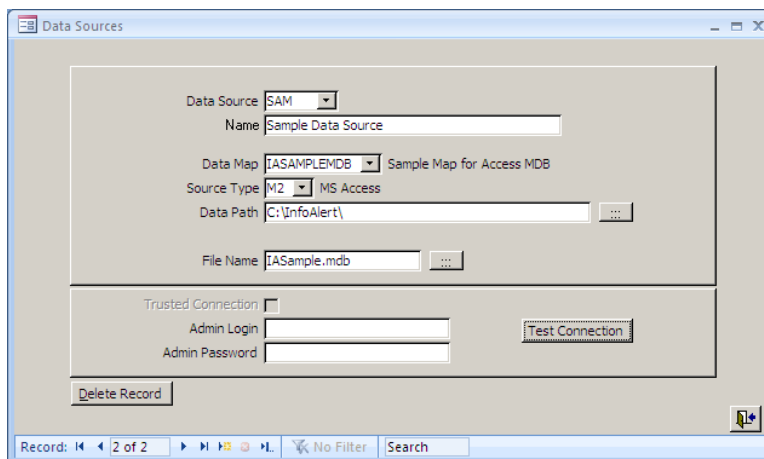
Verify the import of your pre-defined alert package by viewing the alert list again, the newly installed **Map ID** and alerts should now show on this screen.

Data Source Configuration:

A Data Source must be set up to tell Info-Alert where your data is located. This is normally the server name or directory where your accounting data is located, but could also be other data sources you wish to be alerted on.

NOTE: Although there are multiple data source types available in IA, this example will be connecting to an Access database. If you have multiple companies in your accounting software that you wish to be alerted on you will need to set up a separate data source record for each company. (Normally each company would have its own directory or database name).

Choose 'Configuration - Configuration Options - Data Sources' from the Main Menu, to configure the data you want IA to alert on.



Fill in the **Data Source ID** and 'Name' or description for this source. (Note: you may want to use a company Id as the data source Id).

Choose a **Data Map ID** using the pull down to select the appropriate Map ID based on your product.

Choose a **Source Type** based on your data platform using the pull-down provided. This will change the remaining data source headings as required for this data type.

When connecting to a Microsoft Access database or Excel data, enter the UNC path to your data file in **Data Path** (Sample: \\servername\database\data) and the database name in the **File Name**. Provide **Admin Logon**, and **Admin Password** as needed for your source database.

IA has the ability to connect to virtually any ODBC compliant data source like SQL, MS Access, DSN, etc. and you will be asked to provide different sets of information in this screen based on the type chosen.

NOTE: If using a source type of **SI**, then fill in **Server Name** with the SQL server that hosts your data and the database name. IA will need full access to the data so the use of the SQL 'sa' account is typical for a SQL database. You may also use the Trusted Connection if applicable.

Use the **Test Connection** button to test the ability for IA to connect to your data. **YOU MUST GET A SUCCESSFUL CONNECTION FOR INFO-ALERT TO WORK PROPERLY.**

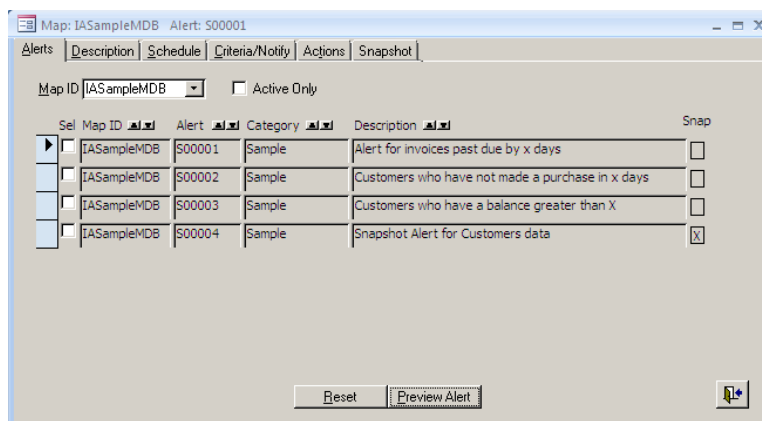
TIP: If this connection test was not successful, revisit your server credential settings or look for any security settings on this machine, or on your network, that may be blocking the connection to your source data.

NOTE: Create a **Data Source** record for every database that IA will use.

Alert Preview: (Manually Run and Test Alerts)

Info-alert is now ready to preview and run a pre-defined alert.

Navigate to the '**Alerts – Alerts - Select Alerts**' screen using the **Main Menu**.



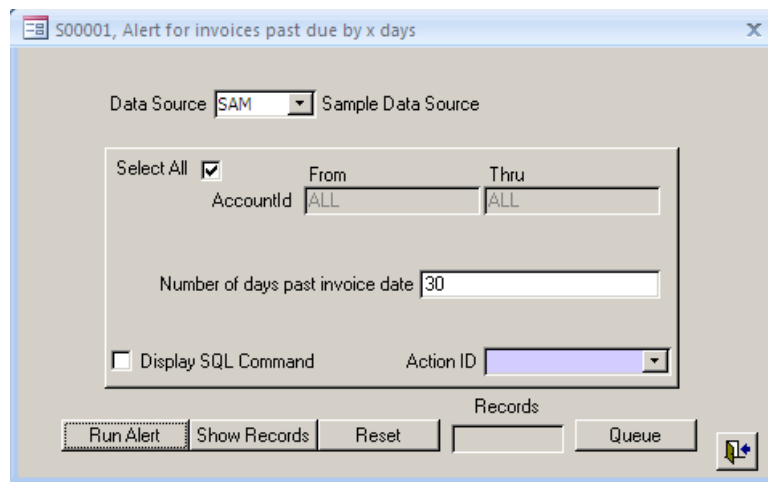
The alert list displays all the alerts available for each **Map ID** or **Alert package**. Use the **Map ID** pull-down here to help filter on alerts for specific maps. The following examples will use

the list of ‘sample’ alerts from the **IASampleMDB Map ID** which were installed during the initial IA installation.

Select Alert S00001 by using the cursor to click on this record. (indicated by the black triangle in the left most column of the list). Once selected, you can use the **Description Tab** to view a brief description of this alert and how it might be used.

Click the **Preview Alert** button from the **Alerts tab** to launch the ‘Alert Test Wizard’ which will allow you to run this alert in a ‘Test’ mode without affecting **Alert History** or actual result output.

Fill-in the needed parameters to test this alert for connectivity and access to your selected data.



Select the **Run Alert** button and wait for the ‘Data Generated’ message.

Choose the **Show Records** button to preview the alert results and print if desired.

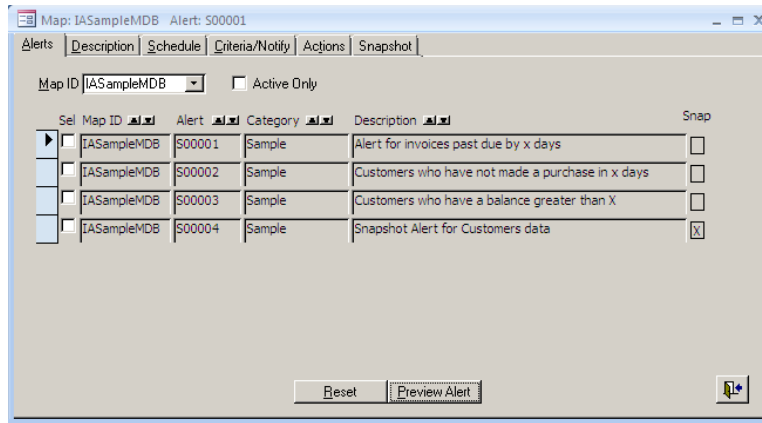
NOTE: If errors are generated during this preview process there may be issues with the alert code or data source you have selected that need to be resolved before running this alert in a ‘live’ setting.

TIP: When running an alert in **Preview mode**, no notifications or history is affected, only the alert results are returned as you might see them in a live IA server output run.

Once you have previewed and tested this alert with different criteria options, continue with the following steps to set this alert with the same criteria, using multiple sequences if desired, to run automatically based on your ‘Live’ Alert Server schedule.

Configure and Select Alerts for LIVE Processing:

Choose 'Alerts - Alerts - **Select Alerts**' from the Main Menu to view a current list of available alerts.



Alerts Tab:

Select the appropriate Map Id and review the list to select an alert as shown in the previous Alert Preview section.

Place a Check in the box to the left of the Alert, the Sel column. This will 'select' the alert for processing by the Info-Alert Server during its next scheduled run. (See IA Server Scheduling later in this document). Un-checking this Sel column will place this alert in a 'Preview only' state but will retain any setup parameters you might have set.

TIP: Click the Sel heading to sort by 'Checked' alerts. Sort the other columns as desired by using the 'Up/Down' arrows at the top of the needed column.

TIP: A single Alert can be configured with multiple sequences or records. This allows the ability to configure the same alert with different Criteria, Actions, and Notifications and even Data Sources.

Description Tab:

Select the Description tab to view a detailed description of every alert. You can also review the last date and time a specific alert ran. The Reset button provides the ability to clear various levels of history saved for each alert.

Criteria/Notify Tab:

Select the **Criteria/Notify** tab to set one or more specific parameter Groups that this alert will use to provide notification to those persons you choose.

The **Alert Criteria screen** is much like the **Preview screen** and gives us the ability to configure our alert in the same way we tested it.

Use **this screen** to provide multiple sets of criteria to alert on. This example ‘Selects All’ customers using alert S00001, just as we did in the previous **Preview Alert** section.

Enter number of days ‘Invoices Past x Days’ to further limit your criteria.

Select a Data Source from the drop down based on the ‘Data Sources’ we tested previously in this guide, to be used as the source of data for this Alert.

- 🌐 **TIP:** Change the fields used for criteria by using the **Alert Field Selections** option from the **Configure Options** in the **Main Menu**. (You may also choose specific criteria as allowed by each alert using the **Individual ID's** area here within the **Criteria Tab**)
- 🌐 **NOTE:** You must make entries in both the **Invoices past x days** and **Data Source** to complete a valid alert setup and continue to the **Notification** screen.

Notification Screen:

Choose the **Notification** button on the **Criteria/Notify** tab to setup how, and who will be notified of this specific alert by internal email, or printout, using predefined alert text.

Enter an **Email ID**, or multiple addresses of those you want notified of this alert by email. (If your environment provides an available email server).

Enter a **Report ID** from the drop down list that was previously setup in the 'Configuration Options - Define Reports' screen to point to a particular printer for a printed output of the alert results.

Choose a **Max Records** amount to limit the number of records that show up on your output. This entry will prevent the potential for a 'run-away' notification in the event of non-specific alert criteria.

NOTE: **Event ID** section of this screen is for advanced users and is explained further in the **IA Administrator's Guide** and various IA bulletins, as is the **Attach** and **Action** boxes.

Close the **Notification** form and setup any additional criteria Groups for this same alert. These additional groups will show as multiple records or sequences for the same alert on the 'Alert Setup' screen.

Actions Tab:

Use the **Actions Tab** as a quick way to view and manage any actions that may be associated with a particular alert.

Action ID	Description	Email	Fax	Interactive
SamDunn	Sample Dunning Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SamDunnFax	Sample Dunning Action Fax	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

As always with IA, you can ‘drill down’ when you see the blue background within a field just as you see here with the **Action Id**. The grayed check boxes are shown for a quick status of the email or fax settings in a particular action and the **Interactive** check box can be used to actually update the action directly from this screen. This tab will come in handy during initial testing and setup of your alert actions.

NOTE: Alert Actions are discussed in detail within the *IA Administrator’s Guide* and various *IA bulletins*.

Snapshot Tab:

The **Snapshot** feature provides the ability to alert on changes in data based upon a snapshot of that data taken on previous alert runs. Please see the **IA Administrator’s Guide** for additional details.

Alert Scheduling:

Schedule Tab:


Use the **Schedule** tab to set individual alert schedules which the IA server will use to determine how often a ‘selected alert’ should run. This schedule screen is similar to many other schedule screens, allowing us to set which days to run the alert and to additionally set the frequency within those days.

Select the setting from the **Schedule Frequency** section to indicate the frequency of this alert.

Select the actual days of the week or month, depending on the **Schedule Frequency** selection, to further customize the schedule for this alert.

Select the setting from the **Daily Frequency** section to indicate the frequency of this alert within the time frame of a day. This allows for an alert to run multiple times a day if needed.


Select the amount of time you want to pass before being alerted on the same record using the **Do not re-notify** (DNR) dialog box. EXAMPLE: If this setting is set to 1 week, and an alert was set to run once every day and that alert had the same results as it did yesterday, IA would not re-notify us on those results. Only after 7 days, in this case, would IA re-notify.

 **NOTE:** The ability of the 'Do Not Re-notify' feature is based on the amount of Alert History saved in Info-Alert. The amount of History saved can be set on the **General** tab of **Admin Info** screen and is 90 days by default. Setting of Always and 0 days will always re-notify on previous results.

 **NOTE:** The same **Alert Schedule** applies to all sequences within an individual Alert.

IA Server Scheduling:

In addition to the individual alert scheduling completed above, you will need to set up a 'Scheduled Task' to run the Info-Alert Server using your operating systems task scheduler.

 **NOTE:** The **Schedule Tasks Utility** can be found in **Control Panel** on Windows XP/2003 machines and in **Admin Tools** on Windows Vista/2008/Windows 7 machines.


The following steps will vary depending on the Windows Operating System:


Open the 'Add Schedule Task' wizard and follow the prompts.


Browse to locate the '**InfoAlertSvr3.adp**' file from your Info-Alert install directory, (Typically C:\InfoAlert).

Choose Daily and select a time of day, or multiple times a day, depending on when you would like the Info-Alert Server to process your selected alerts, (Typically set to **10:30 pm** or a time of day with minimal activity, but can also be set to run frequently throughout the day based on the scheduling needs of your selected alerts).

Provide a username and password with local administrative rights.

 **IMPORTANT:** Verify the setting option for '**run task if user is logged on or off**' is selected, as the **IA Server** will need to run even when the indicated user is not logged in.

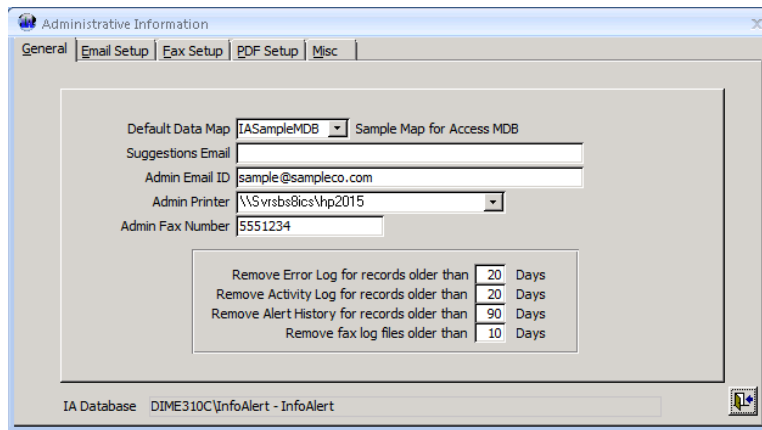
 **NOTE:** Any **changes to the username or password** used to authenticate the scheduled task will need to be reflected in this **IA server** task.

 **NOTE:** This **Widows Scheduled Task** step need only be completed on the machine that is running the Info-Alert server (InfoAlertsvr3.adp).

Initial Administrative Information Setup:

The ***Administrative Information*** screen allows you to configure various options used during alert processing. Here are the minimal settings you will need to get IA ‘up and running’.

Please review the *IA Administrator’s Guide* for additional details and settings.



GENERAL TAB:

Admin Email:

Enter an email address that Info-Alert will use to send administrative alerts pertaining to Info-Alert processing. This will also be used when configured for ‘Test Mode’ using the ***Misc tab*** (shown later in this section) which will redirect all email output to the address shown here.

Admin Printer:

Enter a valid printer that Info-Alert will use to print administrative alerts pertaining to alert processing. **This is a mandatory entry** and the ***IA Server*** will not be able to process alerts unless a valid printer has been selected. If there are no valid printers available in the ***Admin Printer*** pull-down, use the ‘Windows Printer Folder’ to add an appropriate printer.

Admin Fax Number:

Enter a valid fax number that Info-Alert will use when configured for ‘Test Mode’ using the ***Misc tab*** (shown later in this section) which will redirect all fax output to the number shown here.

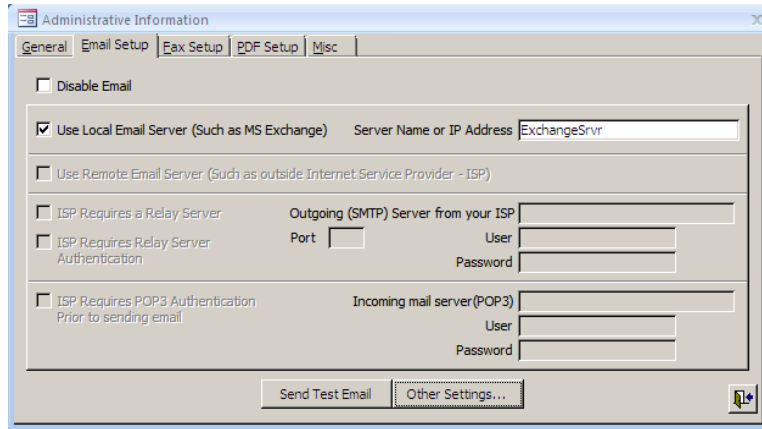
Automatic Purge Functions: (Shown at the bottom of the screen above)

Info-Alert uses the automatic purge settings to keep its logs and history files clean. The default settings are sufficient for most IA environments.

Use the default settings or adjust to keep additional history. Alert History must be held for at least 90 days to allow for alert re-notify functions. Do not adjust these default settings until reviewing the *IA Administrator’s Guide* for further details.

EMAIL SETUP TAB:

Use the **Email Setup** tab to provide Info-Alert with settings required to point to your email server.

**Disable Email:**

Check this box to disable the email generation of alerts. Use this checkbox if you do not have email capability or if your email server is not available for any length of time. **Email is disabled by default**

NOTE: IA internal alert notifications can still be sent using the **Report or Printer Notification** option if no email capability is present.

Local Email Server:

Enter the server name or IP address for your local email server.

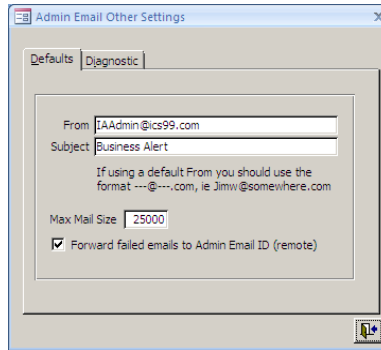
Remote Email Server:

Use the other options to configure a “Remote Email Server” using required authentication per your ISP. Using this transport, always start off by using the least amount of info as possible. Example: Put a check in the **Use Remote Email server..** area and run the **Send Test Email** utility. If this is successful, you are done. If not, you can then add in the name of your ‘outgoing mail’ server and test again. Keep adding the required info until you are able to successfully test.

Other Settings:

Enter a valid email address to be used by Info-Alert as a ‘From’ address on all email outputs, unless otherwise re-assigned within an Action.

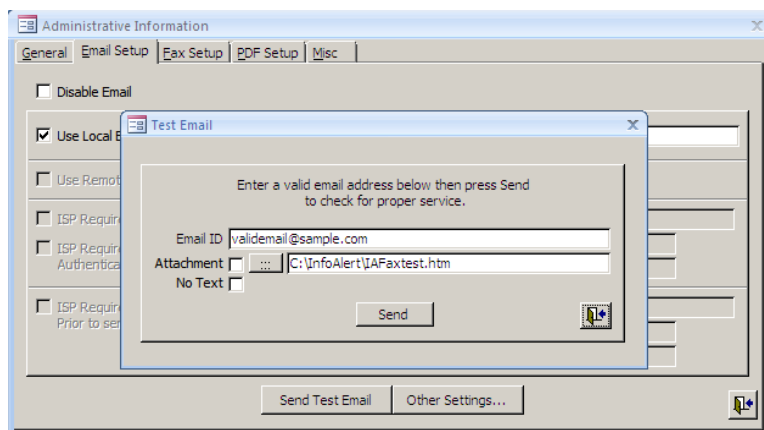
Enter a ‘Subject’ line. Both of these entries will be used for email notifications. Action email ‘From’ and ‘Subject lines’ will also be entered within the Action **Design Email Form**.



NOTE: A valid 'From' address is required now by many mail servers to help protect against Spam. Also include a 'Spam Friendly' subject line that will help your IA email to reach it's destination through the many spam filters. Although each email servers spam filtering in different, valid entries in these two locations will go a long way to helping your email server differentiate IA's email from spam mail.

Send Test Email:

Always test your email settings after making any changes or adjustments. A successful 'Email Sent' message confirms that IA was able to connect to your email server and 'hand off' the test mail.



Enter a known good email address that can be easily verified. If IA was unable to connect and send this test email, you will need to recheck your email server settings or verify that other third party firewalls or spam filters are not inhibiting IA from sending email.

FAX SETUP TAB:

This tab allows for the configuration of the IA Fax Server. Please see the ***IA Administrator's Guide*** for further details.

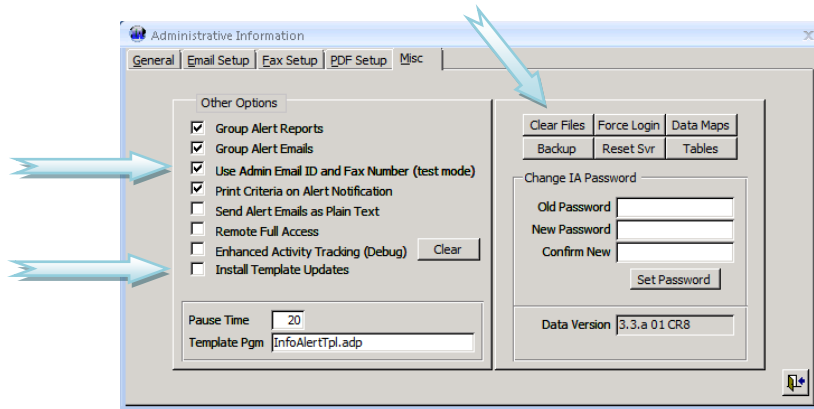
PDF SETUP TAB:

This tab allows you to TEST the PDF output ability built into Info-Alert. Please see the ***IA Administrator's Guide*** for further details.

MISC TAB:

This tab allows for other miscellaneous options for Info-Alert will. See the [IA Administrator's Guide](#) to see details on additional features.

For example: if you are testing a new alert and need to run it multiple times you may want to clear the activity logs between running alerts with the [Clear Files](#) button. This is very handy during your initial alert setup testing.

**Use Admin Email and Fax Number (test mode):**

Check this option to override any email or fax ID's generated in action output. All emails and/or faxes will be directed to the designated 'admin email' address or 'admin fax number' indicated in the [General](#) tab while testing your Action outputs.

NOTE: Always uncheck this option when you are ready to run 'live'.

Install Template Updates:

Use the [Install Templates Updates](#) button to force synchronization between the [InfoAlertTpl.ADP](#) and [InfoAlertSvr3.ADP](#) files, making any new/adjusted [Templates](#) (Access Reports) available to the [IA Server](#) when it next runs. The [InfoAlertTpl.adp](#) is not looked at directly by the [IA Server](#). Import any custom [Access Reports](#) into the [33a01 InfoAlertTpl.adp](#) file prior to the first [IA Server](#) run ensuring all needed [IA Templates](#) are in place. NOTE: Existing [IA Templates](#) from other [InfoAlertTpl.adp](#) files can also be manually imported to the [33a01 Template](#) file using the 'Import' utility within the default file.

Clear Flags:

Use the [Clear Files](#) button to clear alert history, pending emails, and reset error and activity logs. This function should only be use for testing purposes, use caution in a live environment.

Every [IA Server](#) run is recorded in an [IA History](#) table and IA uses this history to determine if, and what results should be processed for output. When testing IA initially you may want to clear this history to allow IA to run alerts as if they had never been run before. You can easily clear various history tables by using this [Clear Files](#) utility.

NOTE: If in a 'testing mode', run this [Clear Files](#) function prior to launching the [IA Server](#) to simulate a first time run, virtually 'resetting' IA back to its virgin state. View the [Activity Report](#) to verify it is empty of any [IA server](#) activity.

Review IA Error and Activity Reports:

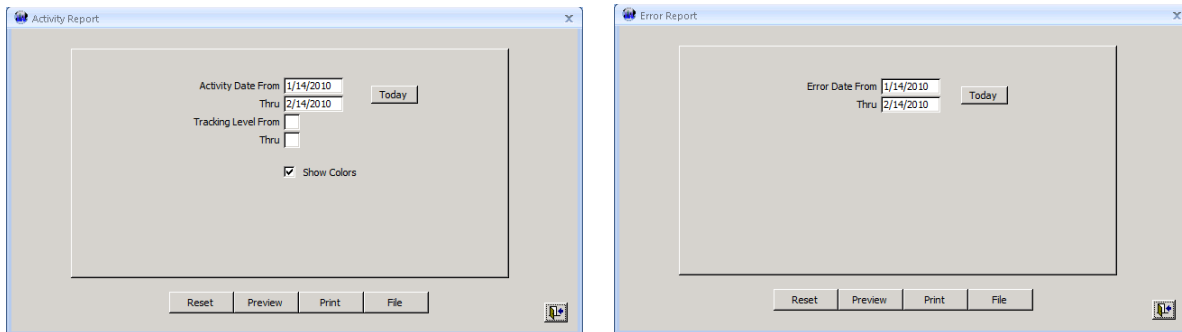
Because Info-Alert is designed to run automatically and unattended, IA ‘logs’ all the server runs in an **Activity Report** and ‘logs’ any error messages in the **Error Report**.

The **Error Report** can be filtered on a date range or just choose **Preview** to show the entire report.

The **Activity Report** can be viewed by date range or tracking level, or again, simply choose **Preview** to show the entire **Activity Log**. Use the page selector at the bottom of the screen to easily move through the pages.

This log will only record alert processing steps when the **IA Server** is ran. When an alert is ran in **Preview** mode, there are no activity or error log entries made nor is there any output of alerts other than **Action Outputs** to the **Submit Que**.

This **Activity Report** breaks down the IA server processes, allowing us to monitor many of the individual steps.



Both of these logs can be very helpful in troubleshooting the IA server and alert scheduling processes. For Example: We see here how many alerts were selected or flagged in our alert list, and how many records were processed for each alert ID.

TIP: Using the **Activity Report**: If we saw alerts flagged but 0 records reported, then we may have a problem with the **DNR (Do not re-notify)** setting in the **Alert Schedule** tab, or the actual alert code. If we saw no alerts flagged, even though we know there are alerts selected in the alert list, then the **Alert schedule** settings for this alert would be suspect.

You will find these two logs will be indispensable during the initial setup and testing of your alerts and alert schedules, especially when testing custom alerts.

Use the **File** and **Print** buttons at the bottom of the **Activity and Error Report** selection screens to easily output and view these logs for Troubleshooting purposes. File output will be saved to a **Report folder** located in the **InfoAlert** root directory.

Product Activation:

Info-Alert must be activated within 60 days of installation for uninterrupted use. The **Activation** screen can be found on the **Main Menu**.

NOTE: Upon completion of the Info-Alert installation, you will have unrestricted use of IA in an 'Evaluation Edition' mode for a period of 60 days, after which you will be locked out until properly activated.

An **Installation ID** based on the hardware and date will be automatically generated and shown on the left side of the Activation Screen. This ID is specific to this installation only.

Press the **Company Information** button to enter your company specific information.

Choose **Preview** to view the **Activation Request** form.

Choose **Print** to output this **Request form** to a printer and Fax to your reseller.

Choose **File** to output this **Request form** to the **Report folder** located in the **InfoAlert** root.

Choose **Email**, if IA has been successfully configured with an email server, to email this **Request Form** to your reseller.

You will receive a return email or fax with an **Activation ID**.

Once you have received your Activation ID:

Enter the **Activation ID** in the provided fields and Press the **Activate** button.

Choose the **Status** button to verify proper activation.

NOTE: If this activation sequence is not completed prior to the 60-day grace period, Info-Alert will no longer function. If this occurs, use the **Activate** button from within the **Activation** screen then follow the instructions to activate for any of the available options.

OPTIONAL

IA Manager (Only) Installation

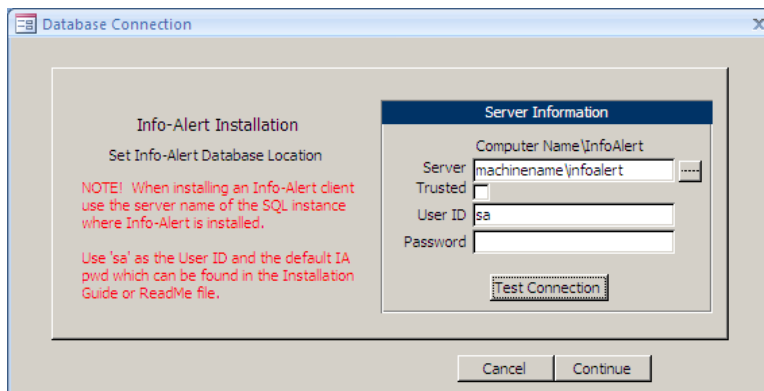
An Info-Alert Manager Only can be installed on another machine within the Info-Alert server domain for remote IA administration, if desired. Because Info-Alert is typically not an application that needs to be accessed often, there is normally little need to have installations of the ***IA Manger Only*** application. Typically there would be one or two 'Alert Administrators' within an organization to setup and maintain the IA environment, and all adjustments and changes would funnel through them.

However, if the need for remote administration is desired, an ***IA Manager Only*** application can be installed and activated on any compatible machine using the following steps and recommendations.

Insert the Info-Alert Installation CD which should automatically start the initial Info-Alert 'Main Installation Menu' and **Choose the *IA Manager (Only)*** button to begin installation.

Follow the installation steps and screen shots found earlier in this manual for the Full installation of ***Info-Alert Manager*** to receive a successful install message.

Double click the ***IA Manager Only*** icon created on the desktop to continue with the **First Time Attachment** wizard.



Fill-in the required ***Server name*** that is used in the ***Full IA Manager*** logon screen. This is the name of the ***InfoAlert SQL server instance*** and location of the InfoAlert database (and full installation of Info-Alert Server/Manager) installed on a different machine.


EXAMPLE: *machinename\InfoAlert*


Enter the SA username and password to access the IA database.
Default logon: Username = **SA** Password = **InfoAlert200%**

Select Test Connection to receive a successful connection message to the 'Master' database.
Select Continue to complete the remote InfoAlert server and data base attachment.

At this point the **FTA** (First Time Attachment) wizard will connect to the existing IA database to provide the ability to remotely administer the **main IA Manager**.

There are a few admin tasks that cannot be completed from a **remote IA Manager** and will be presented in a 'grayed-out' status. These tasks, which include *Report*, *Fax*, and *Email* setup will need to be completed from the machine running the **main IA Manager**.

 **NOTE:** If the **remote IA Manager** was unable to attach the remote IA database specified you should verify the following: Does the IA user have 'full' rights to the **InfoAlert** directory? Are there any firewalls or other security software that might block the network connection to the main IA machine? (See below for other possible settings needed).

 **NOTE:** Unlike the **full IA Manager** logon, you will not have the ability to logon to the **IA Manager Only** using the 'trusted' option, unless additional provisions have been made within the IA SQL instance. Continue to use the 'SA' username and password (By default: InfoAlert200%).

Possible configuration settings needed to allow **IA Manager Only** connectivity.

On the **main Info-Alert SQL instance machine**:

- Use *SQL Configuration Manager* to 'enable' the TCP/IP protocol for the InfoAlert instance.
- Use the *Windows Services utility* to verify the SQL Browser service is 'started' and configured for 'automatic' startup.
- If the *Windows Firewall* is present, add a 'program exception' for **both** the **SQL Server** and the **SQL Browser** files typically found in the following directories:
C:\Program Files\Microsoft SQL Server\Mssql.x\Mssql\Binn\sqlserver.exe and
C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe.
- Use *SQL Surface Area Configuration Manager* to verify the InfoAlert instance is set to allow remote connections. (SQL 2005 servers only).

On the **IA Manager Only machine**:

- Verify there is no additional software that could block the remote connection to the **IA SQL database machine**. Allow for exceptions if needed.

Remote **Fax Manager** and **Submit Queue** setup steps - On the main IA Server machine: (Must be completed to manage IA faxes and Submit Actions from a Manager Only install).

- Share the **IAFaxFiles** and **IAActionFiles** directories within the InfoAlert root directory providing at least 'read' permissions.
- Check the box for **Remote Full Access** on the **Misc Tab** of the **Admin Info Screen**.
- Schedule run of **InfoAlert\InfoAlertFaxUpd.ade** to provide automatic refresh of Fax Manager records when viewing through a **remote IA Manager**.

Manually Install SQL 2008 Express InfoAlert Instance

Use these steps **ONLY** if SQL 2008 Express is unable to be installed successfully from the Info-Alert CD Installation Menu.

This document will step through a MANUAL SQL Server 2008 Express installation using the installation files found on the Info-Alert 3.3.xx Installation CD.

NOTE: Please verify the machine you are installing this software on meets the minimum hardware and software requirements recommended by Microsoft.

Begin Installation :

From the IA CD, launch the setup.exe found in the \SQL2008_xprs directory. Please follow these steps to successfully complete the Info-Alert installation of SQL Xpress for your Info-Alert environment to use. Typical pre-requisites for SQL 2008 Express include:

.Net 3.5 SP1, Windows Installer 4.5, Windows Powershell 1.0

The **SQL Server Installation Center** is the first screen to appear.

After reviewing the available documentation in the Planning section,
Click **Installation** from the left menu panel.

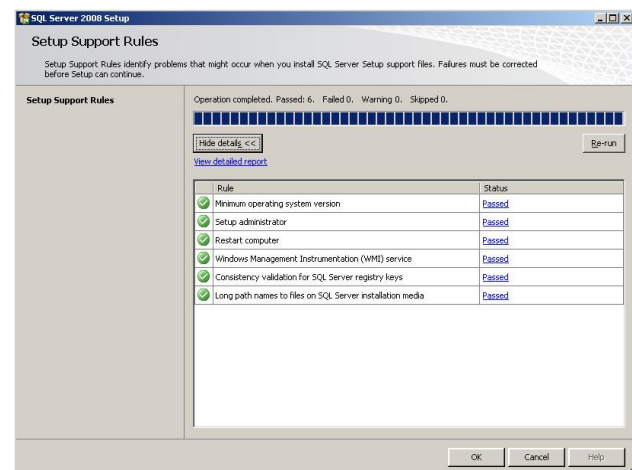


The **Setup Support Rules** screen should appear.
Click on **View Details** to verify that all tests passed.

Once all applicable tests have passed Click **OK** to continue.



Choose **New SQL Server stand-alone installation...** from the list to begin the installation.

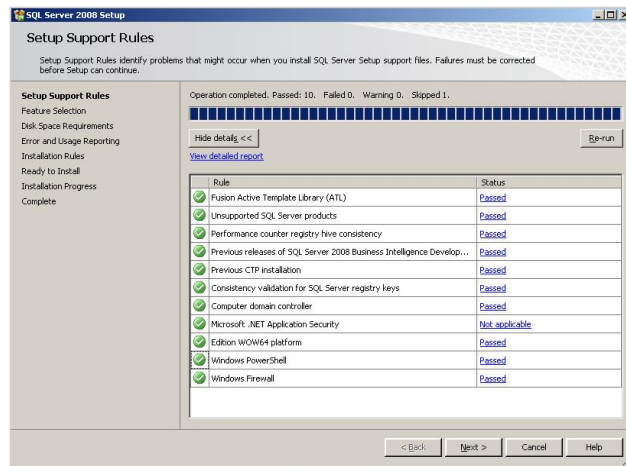
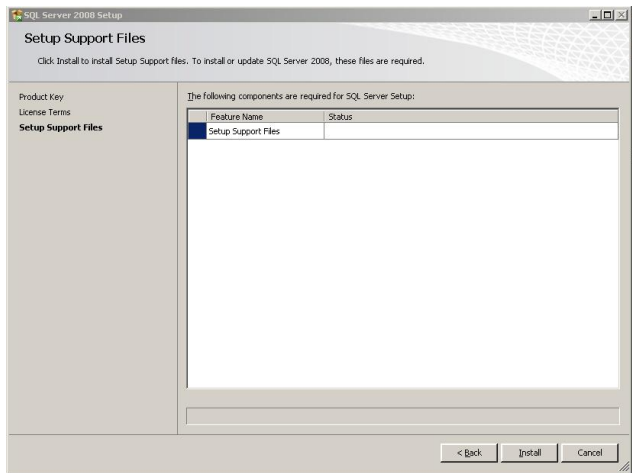




Click on **Install** to continue with the **Support Files** installation and then show the **Setup Support Rules** screen.

The **Product Key** screen should appear grayed out, indicating no **Product Key** is needed for this **SQL Express** edition install. Click **Next** to continue.

Review and **Accept** the Terms and click **Next** to continue.



Check the **Database Engine Services** and **Management Tools-Basic** options.

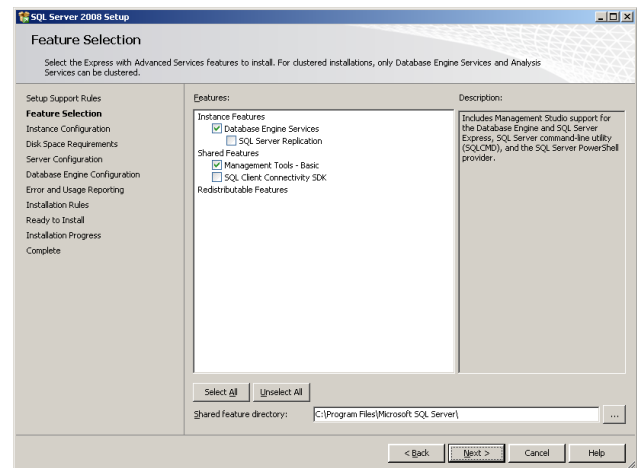
The **Database Engine** is the actual SQL install and is required to provide a new instance of SQL Express.

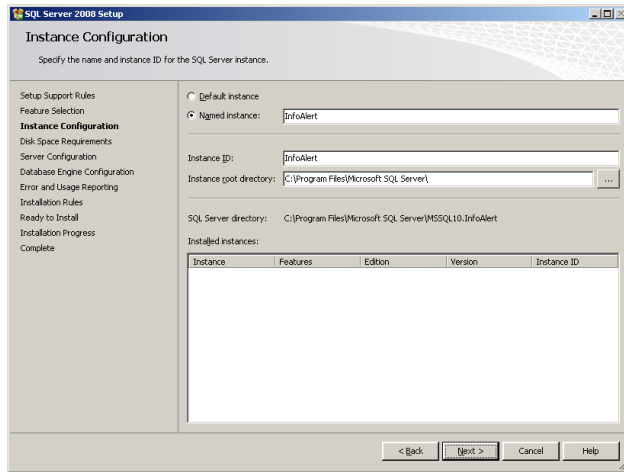
Installation of the **Management Tools-Basic** option may conflict with existing SQL tools. This is not required, but can be a useful tool to manage SQL Express data.

Click **Next** to continue.

Review the details and verify that all tests have passed. If any line items fail, then consult the Microsoft Knowledgebase to get more information on how to correct the failures.

Once all applicable tests have passed, Click **Next** to continue the installation.

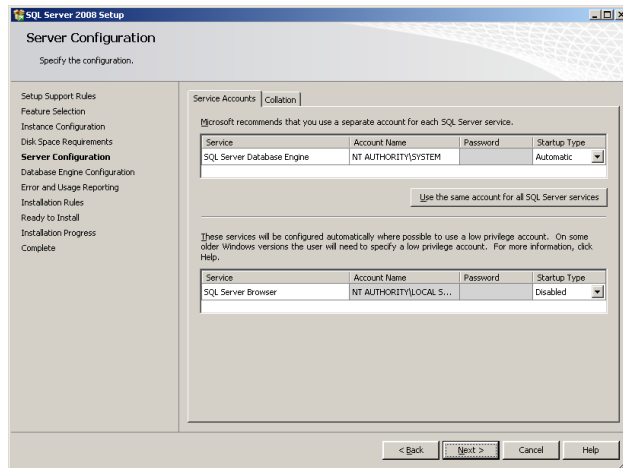
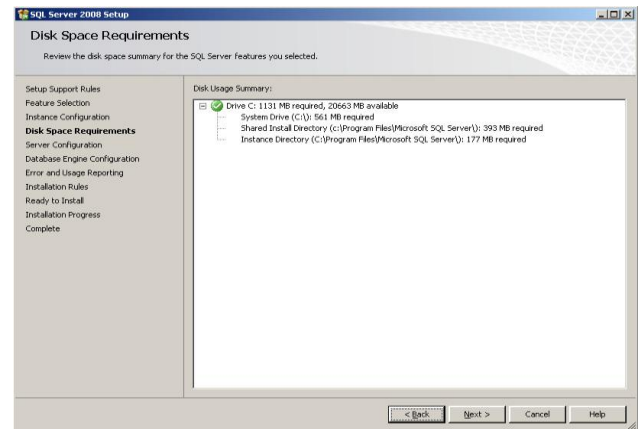




Choose **Named Instance** and **Enter** the name ‘InfoAlert’.

Except the remaining defaults and **Choose Next** to continue.

Verify there is enough disk space. Click **Next** to continue.

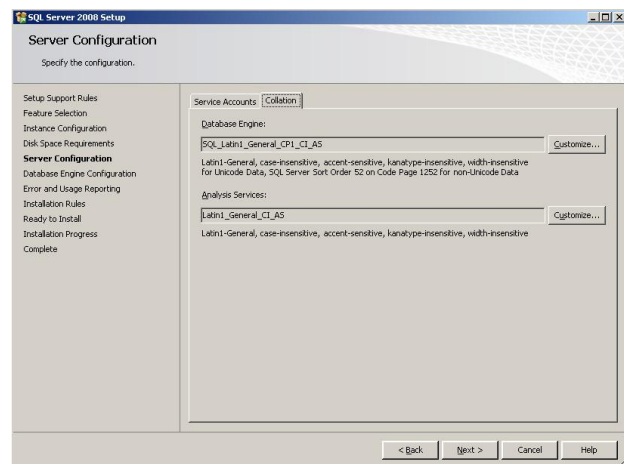


On the **Service Accounts Tab**, use the pull-down for the **SQL Server Database Engine Account Name** to select **NT AUTHORITY\SYSTEM**. All other default settings are normally adequate. The **SQL Server Browser** is set to **disable** by default and is not needed unless the **IA Remote Manager** will be installed and used.

NOTE: This setting can be adjusted at any time after the installation.

The default settings on the **Collation Tab** are normally adequate.

Verify ‘SQL_Latin1_General_CP1_CI_AS’ is chosen by default and **click Next** to continue.

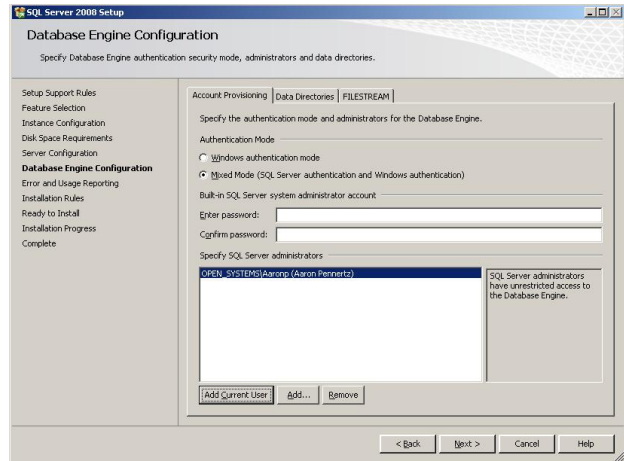


Choose **Mixed Mode** to use both Windows and SQL authentication when logging into IA.

Enter the SA password of **InfoAlert200%** .in the **password** and **Confirm password** areas.

NOTE: This is the default logon password for **IA Manager** and **Tool Kit**.

Choose **Add Current User** button to add the current Windows user as an administrator. Windows administrators are not considered SQL administrators by default on Windows Vista, Windows 7, Server 2003 or Server 2008.



Click **Next** to continue.



Check appropriate boxes if you choose to provide information to Microsoft about your SQL instance.

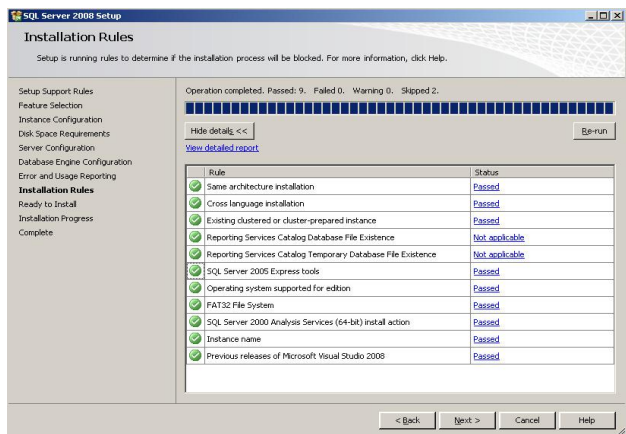
Click **Next** to continue.

Verify that all applicable rules passed their test. If a test failed, consult the Microsoft Knowledgebase for more information on how to fix.

Once all applicable tests have passed.

Click **Next** to continue.

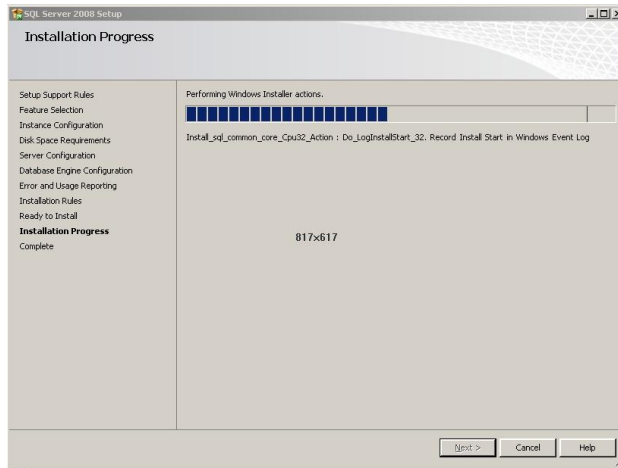
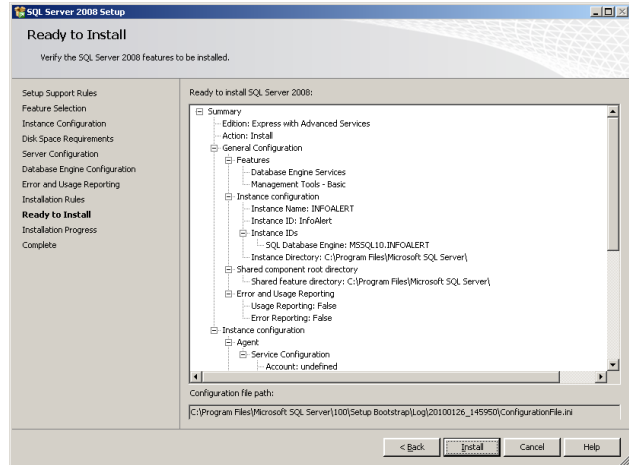
NOTE: If you are installing the 2008 Management Tools on a server that also has 2005 SQL Management Studio installed, you must remove 2005 Management Studio prior to continuing on in the installation.



Review the [Installation Summary](#).

Click [Back](#) to go back and make necessary changes.

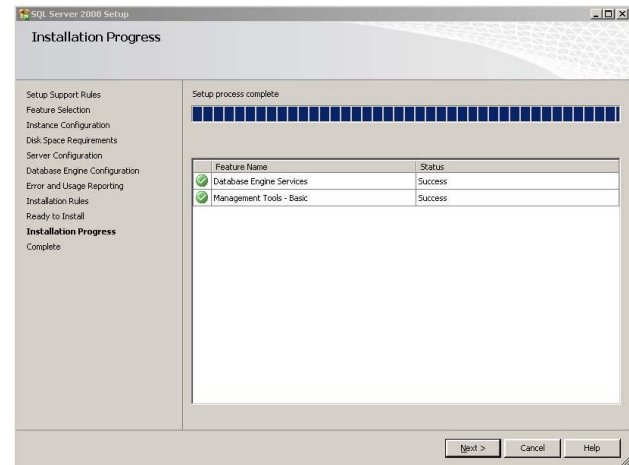
Click [Install](#) to continue.



The [Installation Progress](#) screen appears while the installation is in progress. This may take some time to complete based on the machine's resources.

When the progress is complete, **verify** that all features were successfully installed.

Click [Next](#) to continue.



Verify the installation was completed successfully and **review** the supplemental information.

Close to [finish](#) the installation

You can now continue with the Info-Alert installation.

