

Info-Alert Administrator's Guide

This guide describes the screens and optional settings you will find in the IA Manager and IA Tool Kit after a successful install and basic setup of the product using the 'IA Installation Guide'. Additional details for Actions, Events, Scheduling, Custom Alerts, etc. can be found in the various IA Support and Training Bulletins and are available for download from www.Info-Alert.com.

Info-Alert Components

Alert Manager (also known as the IA client), is installed on the server by default during a typical installation. This is the primary user interface that allows for full administration of your alert system. The Alert Manager can additionally be installed on another computer to allow for remote management of alerts if desired.

Alert Server is installed on the server by default during a typical installation and is represented by two files: InfoAlertSvrLib.adp and InfoAlertSvr3.adp. The Alert Server is the engine that is scheduled to run daily to identify, sort, report and take any appropriate actions you may have configured. The Alert Server is scheduled to run at a time you specify using your operating systems task scheduler. **See the [IA Server Scheduling](#) section of this guide for steps to manually create this task using the 'Windows Scheduled Tasks' utility.**

Tool Kit is a versatile tool allowing for the creation of custom alerts and data maps. Custom data maps allow you to use Info-Alert with many common databases. These custom alerts, data maps, actions, and stored procedures can then be packaged as a WFI file and imported into any fully activated Info-Alert environment for use with many databases.

Printed in the USA. JAN 2010.

2000-2010 Independent Computer Services, Inc. No part of this document may be reproduced without expressed written permission of Independent Computer Services, Inc. Info-alert is a trademark of Independent Computer Services, Inc. Microsoft Access, Microsoft Excel, Microsoft SQL Server, MSDE, SQL Express, Windows NT, Windows 2000, Windows 2003, Windows 2008, Vista, and Windows XP are registered trademarks of Microsoft Corporation.

Table of Contents

INFO-ALERT MANAGER

1.0	Main Menu: Config - Configuration Options	4
1.1	Report Setup, Alert Category	4
1.2	Alert Field Selection	6
1.3	Data Source Creation	7
1.4	Admin Information (General Setup)	8
1.4.1	Admin Information (Email Setup)	9
1.4.2	Admin Information (Fax and PDF Setup)	12
1.4.3	Admin Information (Misc Setup)	13
1.4.4	Template Import Tool (Developers)	16
1.5	Alert Suggestions	17
1.6	Activation	18
2.0	Main Menu: Config - Action and Events	19
2.1	Configure Actions	19
2.1.1	Create File Output Action	20
2.1.2	Create Email/Fax Output Action	21
2.1.2.a	Using Simple Text Editor	24
2.1.2.b	Using Advanced HTML Editor (Detail Table Builder)	26
2.1.2.c	Using Action Templates	29
2.1.2.d	Sample Action Output Formats	30
2.2	Action Exceptions	31
2.3	Action Alternates	32
2.4	Action Addresses	33
2.5	Notification Events	34
3.0	Main Menu: Alerts – Select Alerts	38
3.1	Select Alerts List	38
3.1.1	Preview Alerts	39
3.1.2	Configure Alerts for 'Live' Run	40
3.1.3	Alert Scheduling	44
3.1.4	Snapshot Setup	46
3.1.5	IA Server Scheduling	47
3.2	Alert Description (Alert Deletion)	48
3.3	Manage Notifications	49
4.0	Main Menu: Alerts – Processing	50
4.1	Submit Actions	50
4.2	Manage Faxes	51
4.3	Import WFI File	52

Table of Contents continued on next page...

Table of Contents

(Continued)

INFO-ALERT TOOL KIT (Optional)

5.0	Tool Kit Menu: Utilities – Utilities	54
5.1	Build Alerts (Create Custom Alerts)	55
5.1.1	Using SQL Tokens	59
5.1.2	Manage Templates	61
5.1.3	Test and Publish New & Adjusted Alerts	62
5.1.4	Snapshot Creation	64
5.2	Alert Fields	68
5.3	Alert Categories	68
5.4	Change IA Database location	68
5.5	Create WFI File	69
6.0	Tool Kit Menu: Data Dictionary	71
6.1	Build Data Map (Create New Data Map)	71
6.2	Map ID's (Copy/Delete New Maps, Splash Scrn)	75
6.3	Build Data Dictionary (Adj. Data Maps)	76
6.4	Data Source	77
6.5	Data Groups	78
6.6	Data Fields	79
7.0	Tool Kit Menu: Reports - Reports	79
7.1	Report Lists: Data Source, Groups, Fields and Map Id's	79
A-1	Using Stored Procedures	80
A-2	Issues and Exceptions	81

 Look for the *IA* icons throughout this guide to alert you to any special notes or suggested tips.

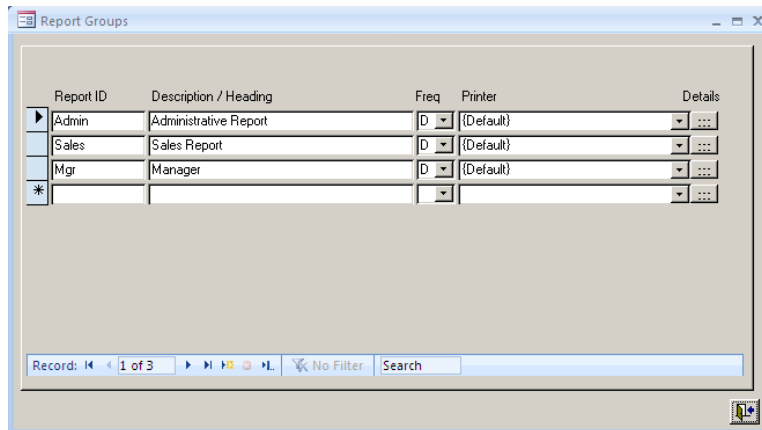
Find the “**Best Practice:**” tags throughout this document showing recommended practice.

Info-Alert Manager

1.0 Main Menu: Config - Configuration Options

1.1 Report Setup:

Info-Alert has the ability to print Alert and Action outputs to configured printers within the Windows Printer folder. Assign these printers to Info-Alert using the *Report Groups* screen within the *Configuration Options Menu*. There are three pre-defined *IA Report ID's* assigned to the Windows default printer which will handle any report output needs in a typical Info-Alert environment. However, you can easily add additional *Report ID* records as required by your specific environment.



Use the **pull-down** on the *Printer* column to choose a printer from the list for any of the pre-defined Report ID's. If a printer you wish to use does not show on this list, you must use the Windows Printers folder to add the required printer to Windows which in turn will make it available to Info-Alert.

Important: Verify there is at least one valid 'Report' type printer (typical LaserJet) installed and set as the Windows Default printer on this IA machine.

Use the **pull-down** in the *Freq* column to choose how often you want IA to output configured alert results to this printer. You may have an alert that outputs email notifications every day but you only want the printed output to occur once a week. Choose *always*, *hourly*, *daily*, *weekly* or *monthly* as desired for each *Report ID*.

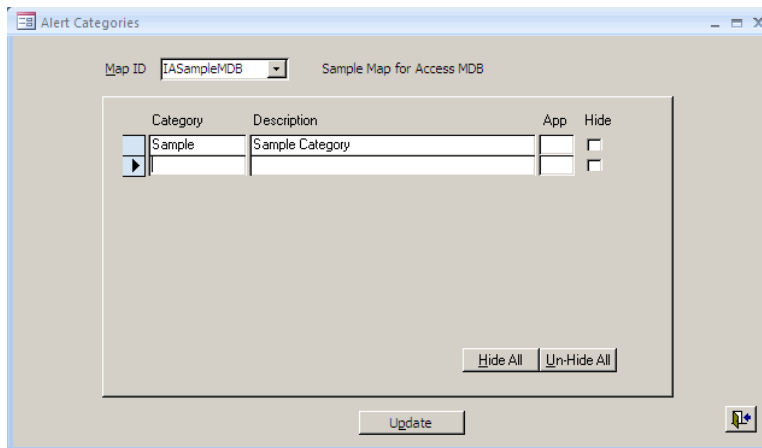
Choose the *Details ...button* at the end of each record to show the date and time stamp for the last print activity.

Note: *Report Groups* can only be configured from the initial 'Full' install of Info-Alert, any remote clients (*IA Manager Only* installs) will not have access to this information for maintenance.

Alert Categories:

Use the *Alert Categories* function to add or change categories used to 'group' alerts. Categories allow you to display your alerts by logical groups when selecting or configuring. You can hide alerts within a given category if you are not using those alerts in your business.

Check the *Hide* checkbox for the groups you wish to hide then press the *Update* button.



Reverse the process to un-hide alert groups.

Add additional alert category records or change existing descriptions at any time.

1.2 Alert Field Selections:

Use this function to change the fields and/or field headings used to set alert criteria. For example in the screen that follows alert S00001 was created to provide an 'Account Id' selection when you configure this alert.

This function can easily be used by a typical end user to adjust an alerts' output based on specific company needs as opposed to using the Tool Kit to modify and republish.

The image shows two screenshots from the Info-Alert Business Alert Software. The top screenshot is the 'Alert Field Selections' dialog box. It displays the following information:

- Map ID: IASampleMDB (Sample Map for Access MDB)
- Alert ID: S00001 (Alert for invoices past due by x days)
- Field ID Selections:

Field ID	Heading
Primary: AccountId	AccountId
Secondary:	
Individual:	
- Logic Heading 1: Number of days past invoice date
- Logic Heading 2:
- Buttons: Add Fields

The bottom screenshot is the 'Alert: S00001' configuration screen. It shows the following criteria:

- Select All:
- From: AccountId
- Thru: ALL
- Individual ID's: [Empty]
- Number of days past invoice date: 30
- Group Heading: Group past 30 days
- Buttons: Delete, Seq: 1, Data Source: SAM, Action ID, Disable, Notification
- Record: 1 of 1


A blue box highlights the 'Number of days past invoice date' field in the configuration screen, with a blue arrow pointing from the 'Logic Heading 1' field in the dialog box above. Another blue arrow points from the 'AccountId' field in the dialog box to the 'From' field in the configuration screen.

NOTE: These *User defined fields* allow you to configure alerts to meet your unique business needs.

If you do not use 'Account Id' in your business you may change the selection criteria to another field from your database, for example 'Distribution Code'. The *Headings* entered here will show on the *Criteria* screen of your alert as shown above.

1.3 Data Sources:

Data sources are used to provide Info-Alert information on the source data it will alert on. Since Info-Alert can point to many types of data, it needs to know where it's located and how to make the connection.

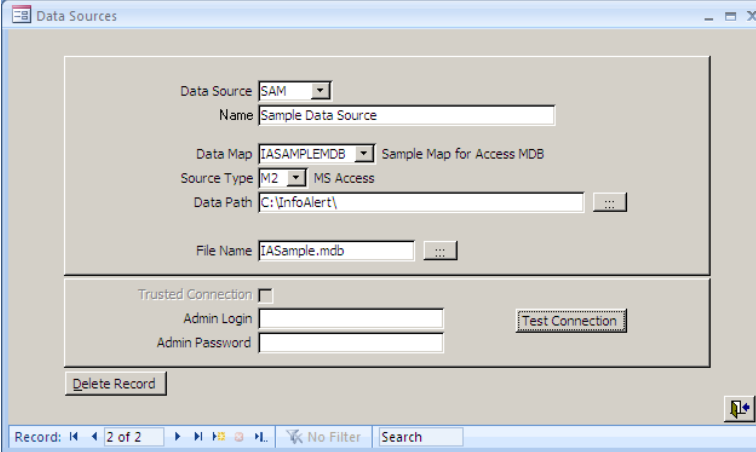
Use the *Record Selector* at the bottom of the screen to choose an existing *Data Source* record or choose the  button to configure a *New Data Source*.

Data Source ID:

Enter a 1 to 3 character *ID* that will uniquely identify this source to Info-Alert users.

Name:

Enter a *Name* or description for this source of data.




Data Map Id:

Select a *Data Map* from the pull-down that is to be used with this source of data.

A *Data Map* is created for each type of database that will be used with Info-Alert. It defines the structure of the data, i.e. tables and fields that are available for alerts. The Info-Alert installation will create a *Data Map* for the IA and SAM data sources to use, otherwise a custom data map can be created with the Info-Alert *Tool Kit*. **A *Data Map* is included with any WFI file (alert package) and will be created automatically during the WFI import.**

Source Type:

Select the *Type of Data* you will be connecting to with this data source, "MS SQL Server", "MS Access", "MS Excel", etc. If you don't see the type of data displayed in the pull down box you can select *DS* to point to any DSN that was previously configured on this workstation with Microsoft's administrative tools.

 **NOTE:** Because different types of data require unique information, the fields and headings that follow the *Source Type* will change based on the type entered. The above graphic shows entries based on a 'MS Access data base' which is the source for IA's *Sample data* map.

Data Path:

Enter the File Path of the MS Access database (in this example).

File Name:

Enter the Database or File Name that holds the source data.

Trusted Connection:

Check the Trusted Connection box if your security model is set and configured to trust your operating system logins. You will not be required to enter an admin login or password.

Admin Login:

If not using a trusted connection:

Enter appropriate Admin User and Password.

Test connection:

Use the Test Connection button to verify a successful connection to the data source.

NOTE: You must be able to create a successful connection to your data source prior to using it in any other Info-Alert function.

1.4 Administrative Information:

The Administrative Information screen allows you to configure various options used during alert processing. Please review the following configuration options prior to making any changes to the default settings.

General Tab:

The screenshot shows the 'Administrative Information' window with the 'General' tab selected. The window contains the following fields and settings:

- Default Data Map: [IASampleMDB] Sample Map for Access MDB
- Suggestions Email: [Empty text box]
- Admin Email ID: [sample@sampleco.com]
- Admin Printer: [\\Svrbs8ics\hp2015]
- Admin Fax Number: [5551234]
- Remove Error Log for records older than: [20] Days
- Remove Activity Log for records older than: [20] Days
- Remove Alert History for records older than: [90] Days
- Remove fax log files older than: [10] Days

At the bottom of the window, it displays 'IA Database DIME310C\InfoAlert - InfoAlert'.

Default Data Map:

The default data map tells Info-Alert what set of alerts to display as a default when scheduling and configuring. This also dictates what Map ID splash screen to show when launching IA.

Suggestions Email:

Enter an email address that suggestions will be emailed to if any are created. Suggestions may be entered using the *Alert Suggestions* option under the *Configure Options* menu. New suggestions for product enhancements or additional alerts you would like to see will be sent to the *Suggestions Email Address* during the next automated server process. The default is info@infoalert.com.

Admin Email:

Enter an email address which Info-Alert will use to send administrative alerts pertaining to Info-Alert processing.

Admin Printer & Admin Fax:

Enter a valid 'report type' printer which IA 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.

Automatic Purge Functions:

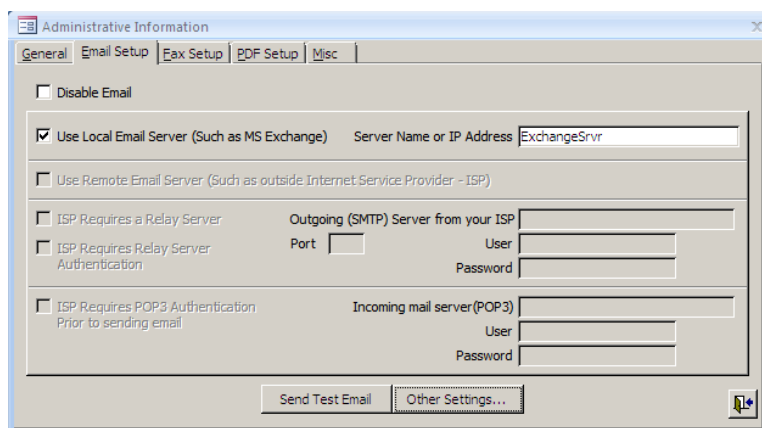
Info-Alert uses the automatic purge settings to keep its logs and history files clean.

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 Tutorial later in this document.

TIP: Instead of adjusting the amount days *Alert History* is held and requiring the *DNR* (Do Not Re-notify) setting to filter through large history tables, **Best Practice** is to use the *IA Tool Kit* to adjust the alert code and provide the needed 'time span' filtering at the results level.

1.4.1 Email Setup Tab:


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



The screenshot shows the 'Administrative Information' dialog box with the 'Email Setup' tab selected. The 'Disable Email' checkbox is unchecked. The 'Use Local Email Server (Such as MS Exchange)' checkbox is checked, and the 'Server Name or IP Address' field contains 'ExchangeSrvr'. The 'Use Remote Email Server (Such as outside Internet Service Provider - ISP)' checkbox is unchecked. The 'ISP Requires a Relay Server' checkbox is unchecked. The 'ISP Requires Relay Server Authentication' checkbox is unchecked. The 'ISP Requires POP3 Authentication Prior to sending email' checkbox is unchecked. The 'Outgoing (SMTP) Server from your ISP' section has fields for 'Port', 'User', and 'Password'. The 'Incoming mail server (POP3)' section has fields for 'User' and 'Password'. At the bottom, there are buttons for 'Send Test Email' and 'Other Settings...'. A help icon is visible in the bottom right corner.

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. This checkbox is checked by default.

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

Local Email Server:

Enter an SMTP server name or IP address for a *Local* email server.

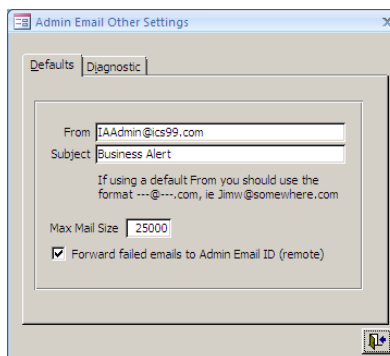
Remote Email Server:


Use the other options to configure a *Remote* email server using required authentication per your ISP. When setting 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 *Test Email* utility using both internal and external email recipients. If this is successful, run the IA server to verify operation. 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 and ultimately email using the IA server.

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.

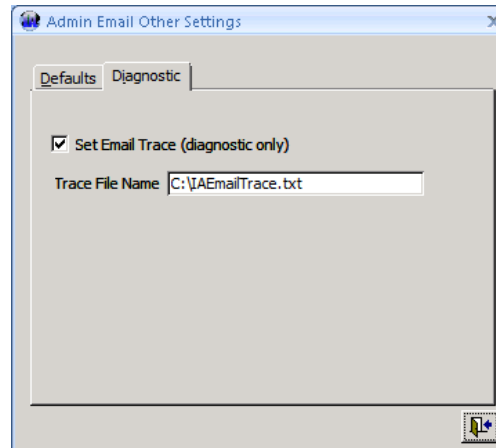
Enter a *Subject* line. Both of these entries will be used for email notifications. Action email 'From' and 'Subject lines' can be entered within the Action *Design Email Form*.



 **NOTE:** A valid 'From' address is required by many mail servers to help protect against Spam. Also include a 'Spam Friendly' subject line that will help your IA email reach its 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.

Other Settings – Diagnostic Tab:

Use the *Diagnostic tab* to configure and create an *Email Trace file*. This file can be very helpful when tracing emails that do not successfully send from *Info-Alert*. But this utility is not available if *IA Email setup* is using the *Local Email Server* setting.



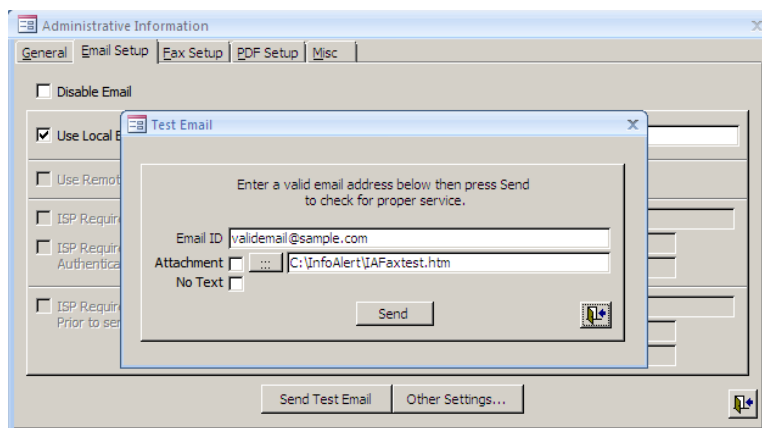
Enable the *Email Trace* utility by checking the *Set Email Trace* box.

Enter a valid path and file name, such as: **C:\IAEmailTrace.txt**. This Text file will be appended to each time the diagnostic is ran, **Best Practice** is to 'rename' the trace file prior to subsequent runs for ease of file comparisons.

NOTE: The *Set Email Trace* check box will be reset after IA sends email either using the *Test Email* function or by running the *IA Server*.

Send Test Email:

Always test your email settings after making any changes or adjustments. Enter a known good email address that can be easily verified for both internal and external recipients. If there are problems, use the troubleshooting check boxes to allow for an attachment to be sent with the test mail or for there to be no text sent in the email body.

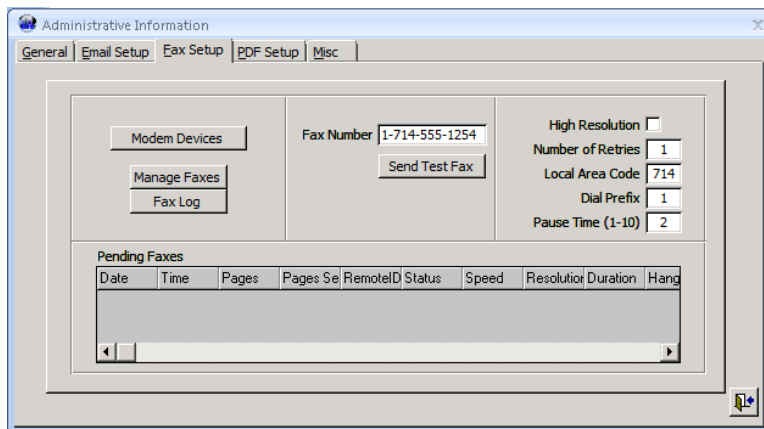


Enter a known good email address that can be easily verified. If IA was unable to connect and send this test email, you will need to recheck your email server settings or verify that other third party firewalls or spam filters are not inhibiting IA from sending email.

TIP: If you have configured Email Setup using the third checkbox, use the *Diagnostic Tab* described in the *Other Settings* section to help troubleshoot and trace any email test failures.

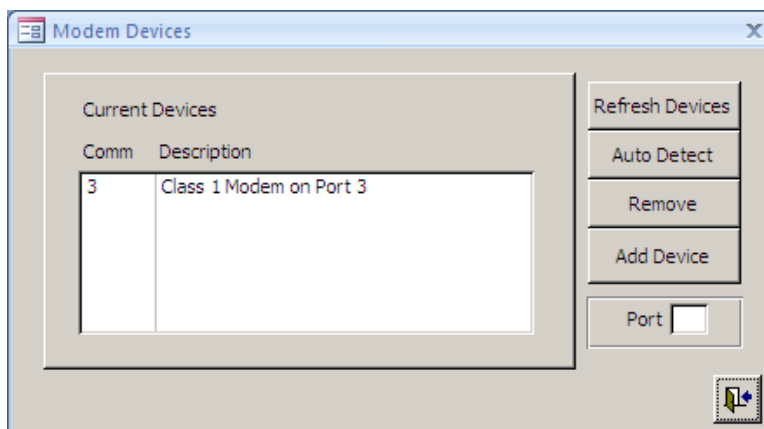
1.4.2 Fax Setup Tab:

The *Fax Setup tab* allows for the setup and testing of the Info-Alert *Fax Utility*, which is installed by default with IA. This *Fax Utility* is NOT installed with the *IA Manager Only* option and must be administered from the *IA Server*.



Modem Devices:

Choose the *Modem Devices* button to find a compatible fax/modem installed locally on the Info-Alert machine. Multiple modems can be detected and used by IA Faxing.



Select the *Auto Detect* button to have IA automatically detect your fax modem.

To Manually add a fax modem: Enter a *Port* value to indicate which port the fax modem is using. Choose *Add Device* to manually add the fax modem to the list. You may have more than one modem installed on your computer but only the ones shown here in the list will be available for Info-Alert faxing.

NOTE: If you cannot auto detect or manually add a fax modem here you may not have a compatible fax modem and will be unable to utilize faxing within Info-Alert. Please review the *IA Support Bulletin* for compatible Fax Modems.

Fax Server Parameters:

Fill-in the needed parameters, Area Code, Retries, Resolution, etc. as needed. These parameters are used by IA when sending automatic fax action outputs.

Test Fax Ability:

Use the Test Fax section to input a fax number and choose the Send Text Fax button to send a sample fax page.

NOTE: the *Fax Server Parameter* settings do NOT apply when sending a test fax, so **enter a valid fax number with any prefixes and area codes needed.**

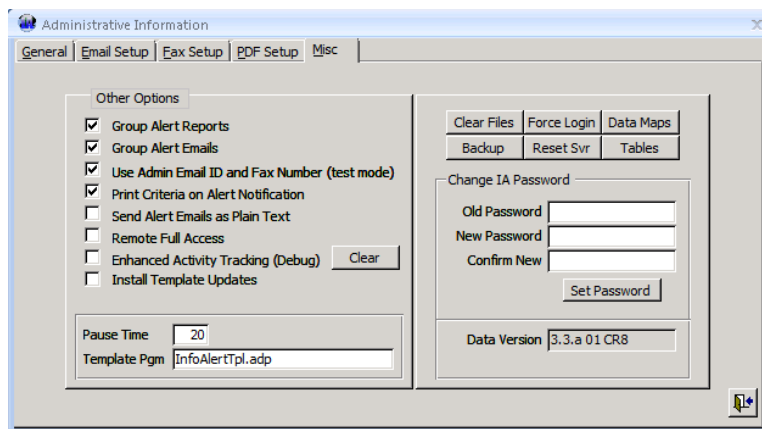
PDF Setup Tab:

Use the *PDF Setup tab* and *Test PDF* button within to create a test PDF file. Verify the success of this test by viewing the test file created in the *InfoAlert\IAActionFiles* folder. IA routinely uses the *InfoAlertPtr* (PDF) printer created during installation and this printer should not be removed or adjusted.

1.4.3 Misc Tab:

The *Misc tab* allows for other miscellaneous administrative options for Info-Alert.

Example: If you are testing a new alert and need to run it multiple times you will want to clear the activity logs between running alerts with the “Clear Flags” button. This is very handy during your initial alert setup testing. Use with caution in a live environment.



Group Alert Reports:

Check here to group multiple alerts for an individual notification onto one report. If this box is unchecked an individual report will be printed for each alert. This box is checked by default.

Group Alert Emails:

Check here to group multiple alerts to the same recipient onto one email. If this box is unchecked an individual email will be sent for each alert. This box is checked by default.

Use admin email and fax:

Use 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 entered on the General Tab while testing your action outputs. **Always** uncheck this option when you are ready to run 'live'.

Print Criteria on Alert Notification:

Choose this option to allow for the printing of alert criteria on alert notifications. This may or may not be used, based on your personal preferences.

Send Alert Emails as Plain Text:

Check here to allow sending the alert emails in a 'plain text' format if you have recipients that are unable to open the files in other output formats.

Remote Full Access:


Use this option when you have one or more 'IA Remote Clients' installed on other PCs. This, along with sharing the FaxFiles and IAActionFiles folders, on the machine running the IA full installation, will allow the remote user to access and administer the Manage Fax and Submit Actions Queues with some limitations as you would if running the IA Manager from the IA server.

Enhanced Activity Tracking:

Use this option to add additional tracking entries to the Activity Report when troubleshooting an Alert using the IA Server. Use the Clear button to remove all previous enhanced tracking entries. **Always** remove this selection after troubleshooting to keep the log concise.

Install Template Updates:


Use this option to force the IA Server to synchronize the Access Reports or IA Templates in the InfoAlertTpl.adp file with the InfoAlertSvr3.adp file. This synchronization will occur during the next run of the IA Server and will then be reset, so this process will not run when unneeded.


 **NOTE:** This option is selected by default after installation so the first run of the IA Server will synchronize with the Template file (InfoAlertTpl.adp) prior to running the selected and configured alerts. **Best Practice:** Import any custom Access Reports into the default 33b01 InfoAlertTpl.adp file using its built-in import utility frmImportTemplates prior to the first IA Server run to ensure all needed IA Templates are in place. See Template Import Tool discussed later in this section.

Clear Flags:

Use the Clear Flags button to clear alert history, pending emails, reset error and activity logs, etc. This function should only be use for testing purposes and extreme caution should be used when clearing flags 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 Flags utility.

 **NOTE:** If in a 'testing mode', run this Clear Flags 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.

 **TIP:** Individual Alert History can be reset using the Reset Alert History feature discussed later in the Alert Descriptions section of this guide.

Force Login:

Use this button to force a login screen when opening the IA Manager after choosing to Save a login authentication during the logon process.

Data Maps:

Use this button to quickly open the Data Maps screen allowing for review or adjustments. This is the same screen accessed through the IA Tool Kit and is discussed further in the Tool Kit section of this Guide. This screen shows specific map description, version and date info.

Backup:

Use this button to launch a simple manual backup of the IA database. This utility will create a IADData.bak file in the IABackup folder of the InfoAlert root. **Best Practice:** The IA Server will automatically backup the IA database once a day to the IABackup folder in the InfoAlert root. This .bak file should be part of your existing nightly backup solution.

Reset Svr:

Use this button to clear the 'IAServer Running' flag that can occur when the IA Server engine is launched while a previous instance of this engine is currently running. Under normal circumstances IA will clear this flag automatically after about a 60 minute delay and the IA Server will be allowed to run unobstructed once again when launched.

Tables:

Use this button to quickly and easily view the various tables within the IA database. **Best Practice:** Use this tool during alert troubleshooting to determine status of data in any IA tables and fields. **Always** use caution when dealing with any live data source.

Change IA Password:

Use this section to change the Info-Alert entry password. Info-Alert must have a password set for proper operation. **DO NOT** change the password using other SQL utilities.

Enter the existing password, a new password, and confirm the new password.

Press the Set Password button to make the change permanent.

Template Pgm:

Enter the name of the database that IA will use when looking for your templates. Typically, and by default, this will be the 'InfoAlertTpl.adp' file installed with Info-Alert.

Data Version:

Use this entry to view the current version level of the IA Database along with any hot fix or additional build numbers. The IA Manager version level can be found in the lower right corner of the Main Menu.

1.4.4 Template Import Tool for Developers:

(Needed if previous custom Templates exist in another infoalertTpl.adp file)

Use this tool to easily import any custom IA Templates (Access Reports) from a previous IA Template file (InfoAlertTpl.adp). **IMPORTANT:** A full version of MS Access 2003 or 2007 is required to launch and run this import utility.

Best Practice: Copy your previous IA Template file into the root directory of InfoAlert, renaming it with a filename that helps identify it, like: InfoAlertTpl_OldVer.adp.

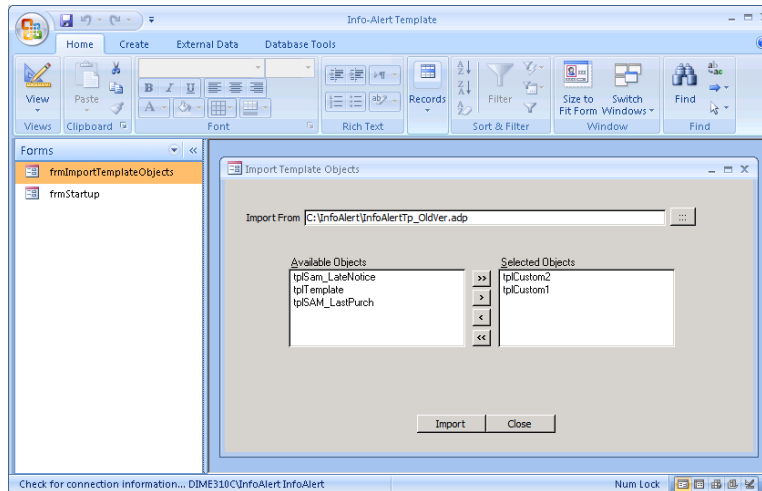
Find the default InfoAlertTpl.adp file located in the InfoAlert root directory during installation.

Double-Click, or otherwise launch this file using MS Access to view the database container.

View the Reports category to see the current IA Templates resident to the IA Template file. The tblTemplate and tblSAM reports should not normally be adjusted or overwritten.

View the Forms category to find the Template Import Tool (frmImportTemplateObjects).

Double-Click to launch the import tool as shown here.



Use the *Import From* line and browse button to point this tool to the desired *IA Template file* which will expose all the available *Reports* for import in the *Available Objects* section.

Highlight one or more of the *Available Objects* and use the > to move the report to the *Selected Objects* section. **IMPORTANT:** Do not select the *tblTemplate* and *tblSAM* reports for import, as there will already be updated ones in the new Template file.

Choose the *Import* button to begin the report import function after verifying correct selections. You will receive a message upon successful import.

TIP: *Alert Actions* using *Templates* ran within the *IA Manager Preview* mode will use *Template IDs* directly from the *InfoAlertTpl.adp* file and a *Template Update* or synchronization is not needed.

1.5 Alert Suggestions:

Select the *Alert Suggestions* function to make recommendations for new pre-defined alerts that you would like to see included with Info-Alert.

Enter a description of your suggestion in *the Suggestion for a new alert box*. Include your name, phone or email if you like

Use the *Print Suggestion* button for a print out or check the automatic email box.

If you check the *Automatically email this suggestion* box this suggestion will be emailed during your next automatic server function.

NOTE: *Suggestions* will use the email address set up in the *General Tab* of *Administrative Info*. The default email address is info@infoalert.com.

1.6 Activation:

Upon completion of the Info-Alert installation, you will have unrestricted use of IA Manager in an 'Evaluation Edition' mode for a period of 60 days, after which you will be locked out until properly activated. Info-Alert can be activated at any time during this evaluation for uninterrupted use. Tool Kit is also available but can **ONLY** be used with the IA Sample data map, installed by default with Info-Alert. Once the programs are installed you will have the ability to run the Activation Screen shown here.

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. This must be completed prior to continuing with the activation process.

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

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.

Once activated, you can verify proper activation by pressing the Status button.

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.

2.0 Main Menu: Config - Actions and Events

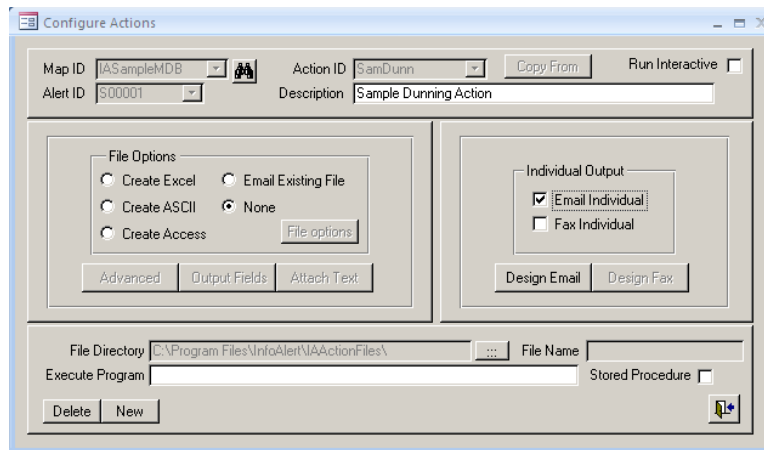
2.1 Configure Actions:

IA Actions are directly associated with a specific *Alert* and can be used to apply additional formatting and output to the returned *Alert Data*. **Example:** Data returned from an alert can be re-formatted then faxed or emailed to customers, vendors or employees. ASCII or Excel files can also be created and emailed, or existing files can be attached to Email/Fax output.

Create an Action: by selecting a current *Map ID* and *Alert ID* from the pull-downs.

Enter an *Action ID* and *Description* that will help identify the type of action for future use and reporting.

View an existing Action: by using the binoculars to show a list of existing Actions.



Info-Alert Actions provide many different options for Action Output:

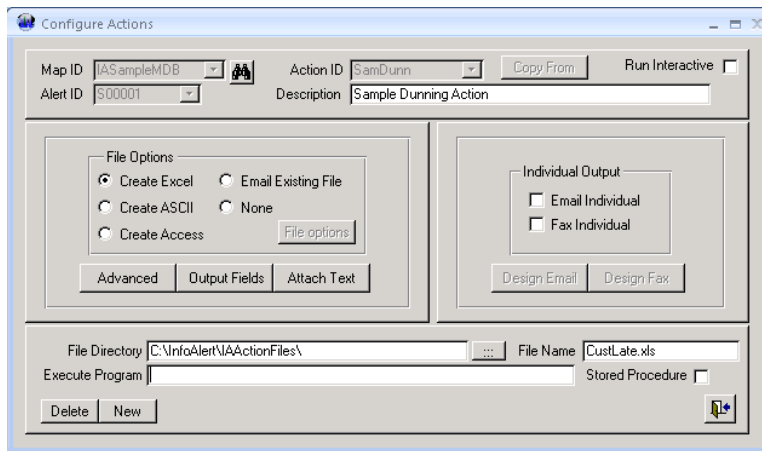
- **File Options:** Ability to direct alert results to various file formats. Also ability to use an *Action* to simply email an *Existing File* to one or more of the *Alert Notification* recipients.
- **Individual Output:** Provides multiple designer tools and methods to create simple or complex formatted email and fax output, all based on a specific *Alert* results.
- **Execute Program:** Allows an *Alert Action* to execute a program or stored procedure, again based on the parameters and results of a specific *Alert*.

TIP: Use the *binoculars* at the top of the *Configure Actions* screen to easily search for all the actions that are currently configured in any *Map Id and Alert*.

NOTE: The various configuration options and uses of IA Actions will be covered in the following sections of this guide. Additional 'Action Examples' can be found in various *IA Support and Training Bulletins* found on the website.

2.1.1 Action File Options:

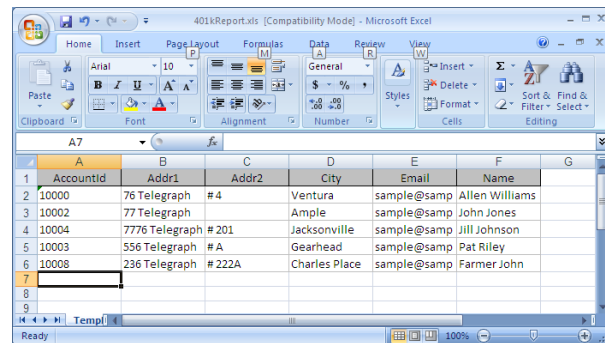
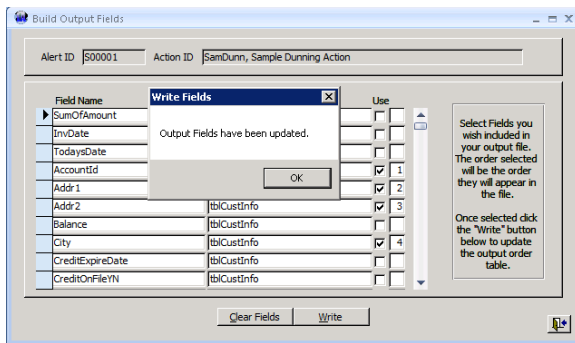
Example: Excel file creation. Steps are similar for ASCII and Access files.



Create a new Action record as shown previously.

Select the desired file format option from the list, like Create Excel.

Choose the Advanced and Output Fields buttons to configure output as desired.



Use the File Directory area on the Configure Actions screen to enter the directory path and filename for the destination location of the created output file. Variables can be used in the filename to help identify the file.

Example: C:\InfoAlert\IAActionfiles\CustLate_**mmddyy**.xls would include today's date.

Or

Select Email Existing File to configure this Action to send an existing document to one or more Alert Notification recipients configured for this alert. This option is configured in conjunction with selecting the Attach check box next to the desired Email Notification address found in the Alert Criteria Notification screen.

2.1.2 Individual Output: (Email and Fax Actions)

The **Email and Fax Design** buttons allow for the use of a couple different *Format Design Editors* to help create many different output types from simple to complex:

- **Basic Text Editor:** Allows for basic formatting of output documents or forms in simple text form.
 - **Advanced HTML Editor:** Provides an additional graphical interface editor, including simple tool bars and wizards to easily create great looking HTML based output, even for those having little or no experience with HTML code. Also includes a 'code' viewer allowing additional creativity for those comfortable with HTML code and a *Table Builder* tool to easily format the *Detail* section of an Action with a table.
 - **Template (Access Report):** IA also provides the option to use a *Template* or Access Report within an email or fax action. This *Template* could allow for an Alert Developer to emulate an existing report(form normally used with the source software.
- NOTE:** Both Action *Output Editors* have the ability to incorporate host company information, logos (only HTML Editor), and any *Field Variables* available to the *Action* through the *Alert Code* result set - for either Email or Fax output.

Examples: This Guide will continue with *Sample Email Actions* from Alert S00001: *SamDunn*, *SamDunn2*, and *SamDunnTpl*.

Design Email Setup:

Email formats for *Alert Actions* can be individually designed using either the *Text Editor* (Basic Text Editor), or the *HTML Editor* (Advanced HTML Editor) which includes the *IA Detail Table Builder*. Both will be shown in the following graphics and descriptions. Action emails may be sent to customers, vendors, employees, prospects, etc., who have email addresses held in the source database.

The screenshot shows the 'Design Email' window for Alert S00001, SamDunn. The window is titled 'Design Email - Alert: S00001, SamDunn'. It contains several fields and options:

- Email To:** A dropdown menu set to 'Email'. There is a checkbox for 'Do not email' and a dropdown for 'Addr ID' set to 'MAIN'. A 'Logo' checkbox is also present.
- Group By:** A dropdown menu set to 'Name'. There is an 'Add Field' dropdown and a 'Format' button.
- Subject:** A text field containing 'Outstanding Invoices'. There is an 'Email From' button.
- Editor Type:** Radio buttons for 'Text Editor' (selected) and 'HTML Editor'.
- Preview Area:** A table with three columns: 'Header', 'Detail', and 'Footer'.

Header	Detail	Footer
Date: [From SQL.TodaysDate]	Invoice [tblDetail.InvoiceNum] dated [From SQL.InvDate] has a balance of \$[From SQL.SumOfAmount.2]	Please reply to this email with the status of payment for the invoice(s) shown above or call our office at (714) 555-1234 with any questions
To: [tblCustInfo.Name] - Attn: Accounts Payable From: IA Sample Company		
- Buttons:** 'Edit' buttons are located below each column in the preview area. At the bottom of the window, there are buttons for 'Build', 'Edit', 'Delete', 'Preview', 'Template', 'Print', 'Attachment', 'Format', and 'Rename'.

Email To:

The *Email To* field is pulled from the source database associated with the alert being generated. **Example:** An *A/R Late Notice* message will be emailed to the email address held in the customer record of those customers with past due invoices.

Group By:

Use the Group By pull down to enter a valid field name with which to group the email output. This allows Info-Alert to keep all records together for a given customer, order, vendor, etc.

Example: A single email output will show all outstanding invoices for the specific customer.

Subject:

Enter the Subject line to be shown on the email sent by this action.

Add Field:

Use the Add Field pull-down to insert any field variable available from the alert code to the Subject Line of an email Action. **Example:** “[CustName], Please review the attached documents” would include the customer’s name on the subject line of the final email output.

Addr ID:

Include a company name, address and logo on your IA Action HTML output by **Selecting** an existing Address ID from the pull-down or *double-clicking* the field to add a *new* address record on the fly. This function can also be accessed from the Main Menu and the steps are detailed in the Action Address section later in this guide.

Create multiple address records to use different company names on separate Action Outputs.

Addr ID Format:

Use the Addr ID Format button to make typical adjustments to the alignment and font settings of the address info. These adjustments are only available when using the Address ID feature.

Logo:

Select this check box to include the logo, if previously defined, from the selected Addr ID.

Logo Format:

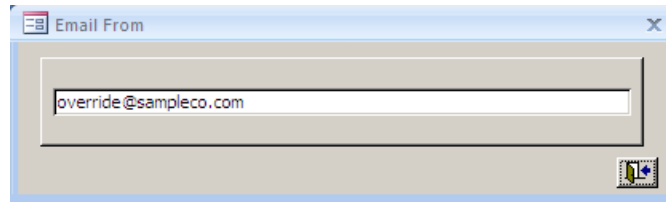
Use the Logo Format button to make typical adjustments to the alignment and size of the logo. These adjustments are only available when using the Address ID feature.

Do Not Email To:

Use this check box to keep an action from being sent to an email address within your current data source. This is normally used in conjunction with the Action Check box in Alert Notification directing IA to email this Action only to the specified notification recipient, not a recipient from the source data.

Email From:

Use the Email From button to assign a ‘From’ line to the specific emails sent with this Action ID. The default ‘From’ line specified in the Other Settings button of the Email Setup tab found in the Admin Info screen will be used if this field is left blank.



TIP: This feature is useful to help ensure email replies funnel to the appropriate person.

Print Action:

Select this check box and the adjacent entry box to print the *Action output* directly to a specified printer available to the local machine. **Example:** This feature can allow for a specially formatted *Action output* to be printed for mailing rather than faxed or emailed.

Attachment:

Use the *Attachment* box to enter the path to a valid file that will be attached to the Action fax or email output. Use the *'browse' button* to easily search for this path and file. **NOTE:** If this path is not valid or the indicated file is not available when this Action runs the email or fax *output will still be sent*.

Attachment Format (Option):

Use the *Attachment Format* button to view your attachment path/file and to add a *Group By Field Format Token* if desired. This option allows for different filenames to be attached to a specific *Action Output* based on *the Group By* field assigned to that Action. To include the *Action Group By* field: add the {GroupBy} token to the filename; to identify files by dates use any combination of the typical {mmddyyyy} format. **Example:** The filename **H:\IAAttachments\por{groupby}.pdf** configured in an *Action* with a *Group By* of 'TransID' would attach the filename matching the specific TransID to the email or fax output when the *Action* is processed.

Attachment Rename (Option):

Use the *Attachment Rename* button to rename the attachment file, appending the file with the word *Sent*. **Example:** H:\IAAttachments\por12546sent.pdf

Delete:

Use the *Delete* button to remove current Email or Fax configuration from the design screen of this *Action*. The parent Action will *not* be deleted.

Preview:

Use the *Preview* button to open the current design screen in *Preview mode*. Useful to quickly view the intended look and feel of your *Action output*.

TIP: Use the *Fax Design* button in much the same way as described above, to create nicely formatted fax output also.

2.1.2.a Using the Simple Text Editor:

Enter the required Action info in the top section of this screen as detailed in the previous section n: 'Action Individual Output', then continue with the Simple Text Action setup steps.

The screenshot shows a window titled "Design Email - Alert: 500001, SamDunn". At the top, there are several controls: "Email To" (dropdown), "Do not email" (checkbox), "Addr ID" (dropdown set to "MAIN"), "Logo" (checkbox), "Group By" (dropdown set to "Name"), "Add Field" (dropdown), and "Format" buttons. The "Subject" field contains "Outstanding Invoices". Below this are radio buttons for "Text Editor" (selected) and "Html Editor", along with an "Email From" button. The main area is divided into three columns: "Header", "Detail", and "Footer".
 - Header: Date: [From SQL.TodaysDate]; To: [tblCustInfo.Name] - Attn: Accounts Payable; From: IA Sample Company. An "Edit" button is at the bottom.
 - Detail: Invoice [tblDetail.InvoiceNum] dated [From SQL.InvDate] has a balance of \$[From SQL.SumOfAmount.2]. "Build" and "Edit" buttons are at the bottom.
 - Footer: Please reply to this email with the status of payment for the invoice(s) shown above or call our office at (714) 555-1234 with any questions. An "Edit" button is at the bottom.
 At the bottom of the window, there are fields for "Template", "Print", "Attachment", and buttons for "Delete", "Preview", "Format", and "Rename".

Select the Text Editor button to continue with the Simple Text Designer. This selection will produce Action output in TEXT format only.

Header:

Choose the Edit button at the bottom of the Header view to see the header edit screen.

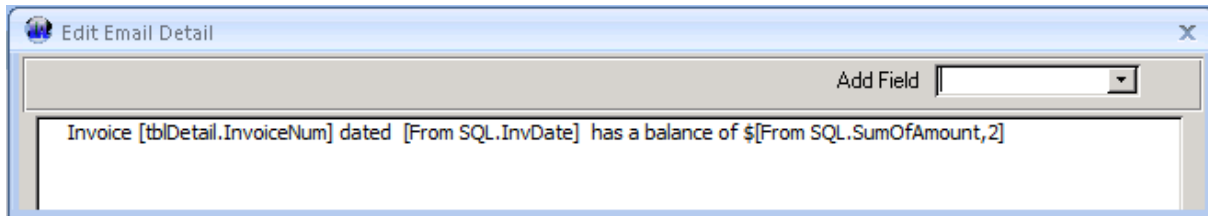
The screenshot shows a window titled "Edit Email Header". At the top, there is a "Suppress Extra HTML formatting" checkbox and a "Format" button. Below this is an "Add Field" dropdown menu. The main area contains the following text:
 Date: [From SQL.TodaysDate]
 To: [tblCustInfo.Name] - Attn: Accounts Payable
 From: IA Sample Company
 Re: Status of unpaid invoices.
 The invoices shown below are still unpaid beyond our agreed upon terms. Please indicate the status of payment for these invoices in an email reply as soon as possible.
 Thank you for your prompt attention.

Enter the text you would like to see in the Header section of the output. This text will print just under the company information (if an Addr ID was used as detailed earlier).

Use the Add Field pull down to add field variables available to this alert through its code.

Detail:

Choose the Edit button at the bottom of the Detail view to see the header edit screen.



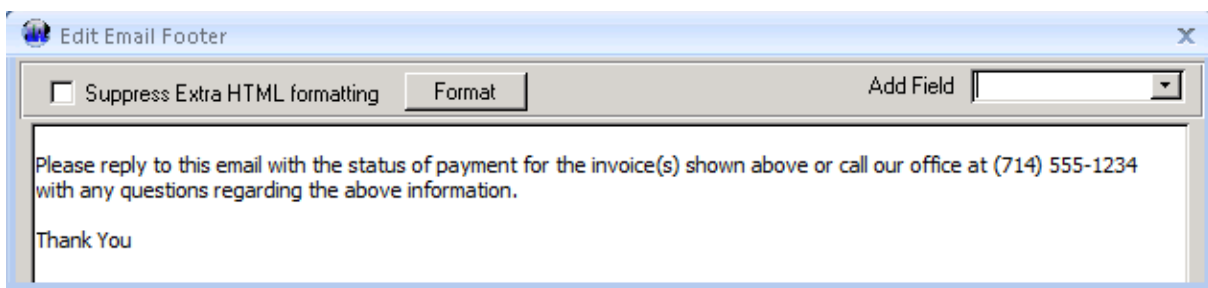
Enter a combination of text and *Field Variables* in the Detail section to show the wording and data fields you would like the *body* of your email or fax to use. **NOTE:** When this Action is processed, the lines entered into this Detail section will be duplicated as needed, depending on the resultant records returned by the Alert.

Example: *Invoice [tblDetail.InvoiceNum] dated [From SQL.InvDate] has a balance of [From SBL.SumOfAmount] , where all of the '[]' variables are provided in the Add Field drop downs and will be filled in with actual data from your data source upon the running of this action: Invoice **12564** dated **3/17/2005** has a balance of **\$500.39***

Use the Add Field pull down to add field variables available to this alert through its code.

Footer:

Choose the Edit button at the bottom of the Footer view to see the header edit screen.



Use the Footer in much the same way as the Header section. This area allows for a wrap up of your email or fax.

Example: *'Thank you for your quick response to this issue and please respond to this email with a status of your payment.'*

NOTE: The text inside the brackets shown in these examples will be replaced by actual data from your database.

TIP: Use the Preview button often throughout your Action design to easily see a sample of your Action output.

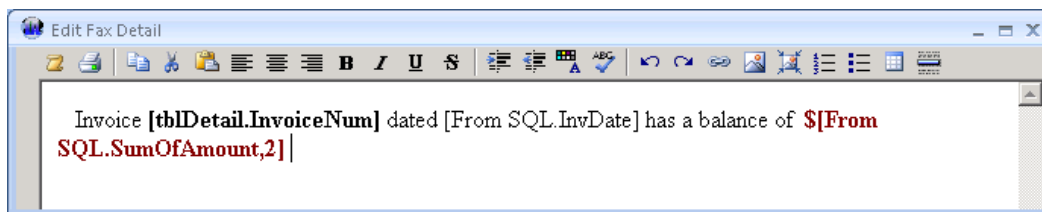
- NOTE: If a logo and company address is included in this *Header* section, as in the example, the *Addr ID* check box detailed earlier in this section is not needed and should be left unchecked.

Use the *Add Field* pull down to add field variables available to this alert through its code.

Detail (Edit or Build):

Edit Button: (HTML editing or custom coding)

Choose the *Detail* sections *Edit* button to see the *Advanced Detail Edit* screen which allows you to use the *HTML designer* tool to create simple or complex content for your detail output, or you can use the *View Script* icon from the toolbar to adjust or add HTML code directly.

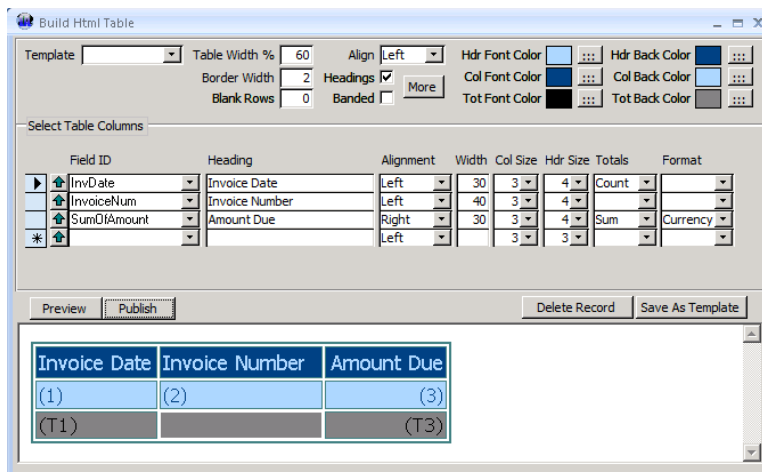


Example Output:

Invoice **23561** dated 04/24/09 has a balance of **\$210.52**
 Invoice **23755** dated 06/15/09 has a balance of **\$210.52**

Build Button: (Table Builder tool)

Choose the *Build* button to use the *Detail Table Builder* tool which allows you to add simple to complex 'row and column' tables to the detail section of your Action output.



Use the *top section* of the Build Tables screen to setup multiple formatting selections like, column and font color, table width, font style, etc.

Use the *middle section* of the Build Tables screen to indicate which field data will be represented in each column of the table and additional formatting for alignment, column width percentages of 100, etc. A Totals line can also be added for either a column count or sum.

Use the *bottom section* of this screen to view a sample of the table formatting selections by choosing the *Preview* button

Select the *Publish* button when satisfied with the table formatting which will copy this table to the *Detail* section of the current Action.



Select the *Delete Record* button to clear the formatting selections of the currently displayed table allowing you to begin a new table build. This will NOT delete the table previously published to the current Action.

Use the *Save Template* button to create a saved template of the current table design. This template will include all the formatting configured in the *top section* of the *Table Builder* tool and will not contain any field selections in the *middle section*.

Use the *Template* pull-down at the top left of the screen to view and select any previously saved *Table Builder Templates*.

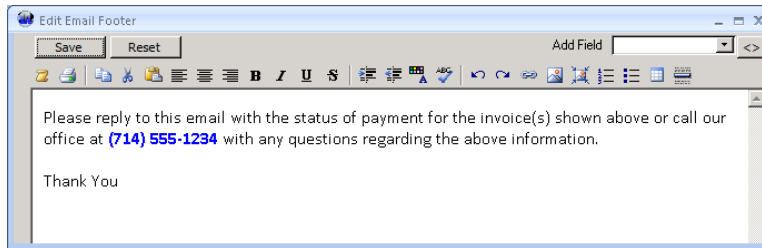
Example Output:

Invoice Date	Invoice Number	Amount Due
2/15/2003	123	\$40.00
3/15/2003	333	\$60.00
(T) 2		(T) \$100.00

-  **NOTE:** When this Action is processed, the lines or table records entered into this *Detail* section will be duplicated as needed, depending on the resultant records returned by the Alert.
-  **TIP:** You can use the Edit button of an Action Detail section after a Table has been published to further adjust the HTML code, but any changes done while in the HTML Editor mode will not be reflected back to the Table Builder tool.

Footer:

Choose the Edit button at the bottom of the Footer view to see the header edit screen.

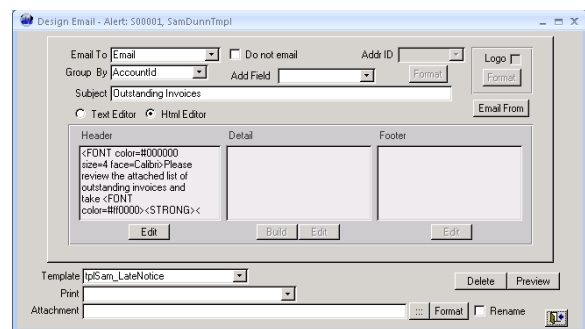


Use the Footer in much the same way as the Header section. This area allows for a wrap up of your email or fax.

2.1.2.c Using Action Templates:

Use this option to allow for a very versatile and creative way to send an action using an IA Template (Access Report) you have created within MS Access. This Template could be a virtual copy of an actual Invoice, Order Acknowledgement, etc, from your accounting software, that when used with an action could allow for the automation of sending such documents to your customers.

Example: A replica Template of your accounting software's 'Order Acknowledgments' could be created and then used by the appropriate alert and action to email your customer an order acknowledgment every time an order was entered into the accounting software.



NOTE: Entering an IA Template in this field will automatically block the ability to use the Detail and Footer sections of the Email Designer, as these sections would be represented within the Template layout; however the Subject and Header sections are still active. **Further Note:** These same sections can be used in the Fax Designer and be seen when Previewed but will not show on the actual fax output.

IMPORTANT: Any adjustments to IA Templates in the InfoAlertTpl.adp file must be synchronized with the IA Server. See the Admin Info - MISC section earlier in this guide.

NOTE: Using IA Templates can provide an 'Alert Administrator' with a great way to create an Action output with more formatting, graphics and code logic than is available using the built-in IA HTML Editors. However, the Advanced HTML Designer found on the Action screen can allow for a great looking action output without needing to know Access or HTML coding. **Learn more** about this advanced editor earlier in this section.

TIP: Use the IA Tool Kit Build Alerts utility to manage templates. Here you will be able to Edit existing, Copy existing or Create your own template using Microsoft Access. See the Tool Kit section of this manual for more details on managing IA Templates.

2.1.2.d Action Output Samples:

The following screen shots are samples of email output formats based on the example Text, HTML, and Template Actions from the previous section:

Action HTML Editor Output:

IA Sample Company, Inc.
255 E. Sample Road
Somewhere, Ca 92555

Phn: 714-555-5985
Fax: 714-555-2222

Date: 8/30/2010
To: Allen Williams - Attn: Accounts Payable
From: IA Sample Company

Re: Status of unpaid invoices.

The invoices shown below are still unpaid beyond our agreed upon terms. Please indicate the status of payment for these invoices in an email reply as soon as possible.

Thank you for your prompt attention.

Invoice Date	Invoice Number	Amount Due
2/15/2003	123	\$40.00
3/15/2003	333	\$60.00
(T) 2		(T) \$100.00

Please reply to this email with the status of payment for the invoice(s) shown above by clicking here custsrv@sampleco.com, or call our office at (714) 555-1234 with any questions regarding the above information. You can also review your account on our website: www.sampleco.com

Thank You

Action Template Output:

Info-Alert
Intelligent Alerts for Business

Page 1

EMAIL TO:
123 Somewhere St.
Anytown, CA 92555

To: Allen Williams
ACCOUNTS PAYABLE

Date: Monday, August 30, 2010

Re: OVERDUE INVOICES

The invoices shown below reflect payments marked through today. Please send your payments at the time of your invoice's due date or call to discuss your terms later. Please call Betty at (714) 555-2222.

Invoice Number	Invoice Date	Balance
123	2/15/2003	\$40.00
333	3/15/2003	\$60.00
Total Due		\$100.00

Please check the status of payment for the above invoices.

Thank You

Generated With Info-Alert Business Activity Monitoring Program

Action Text Editor Output:

Sample Company, Inc.
123 Somewhere St
Anaheim, CA 92807
Phone: (555) 555-5555
Email: jimw@sampleco.com
Date: 8/30/2010

To: Allen williams - Attn: Accounts Payable
From: IA Sample Company

Re: status of unpaid invoices.

The invoices shown below are still unpaid beyond our agreed upon terms. Please indicate the status of payment for these invoices in an email reply as soon as possible.

Thank you for your prompt attention.
Invoice 123 dated 2/15/2003 has a balance of \$40.00
Invoice 333 dated 3/15/2003 has a balance of \$60.00

Please reply to this email with the status of payment for the invoice(s) shown above or call our office at (714) 555-1234 with any questions regarding the above information.

Thank You

TIP: Additional samples of Action configuration and uses can be found in other Alerts within the IASample Map ID listed in the Select Alerts screen of the IA Manager.

2.2 Action Exceptions:

Action Exceptions are used to suppress the sending of emails or faxes to certain ID's. You can identify customers, vendors or others that you do not wish included when automatically sending emails or faxes.

Type Fax or Email ID	All	Alert ID	Action ID	Reactivate
E sample1@sampleco.com	<input checked="" type="checkbox"/>			
*	<input type="checkbox"/>			

Record: 1 of 1 | No Filter | Search | Purge Inactive Records

Type:

Enter an 'E' for email or 'F' for fax to identify the type of ID you want to suppress.

Fax or Email ID:

Enter the *Fax* number or *Email* address to suppress

All:

Use this checkbox to tell Info-Alert to suppress this ID for All alerts.

Alert ID:

Enter an *Alert ID* to suppress the email or fax output based on a *Specific* alert.

Action ID:

Enter an *Action ID* to suppress this ID only for a given Action.

NOTE: Be sure to uncheck the All check box if this exception will be used with a specific *Alert* or *Action*. The All setting will override any additional settings for this exception.

Re-Activate:

Use the *Re-Activate* entry to suppress sending to a specific *Email* or *Fax* ID for a certain amount of time. Enter a date in the *Re-Activate* field telling Info-Alert when to continue sending alerts to this ID. **Example:** This can be used if you want to suppress sending A/R Late Notices to a customer while you work with them.

Purge Inactive Records:

Select the *Purge InActive Records* button to delete records that have past their reactivate date.

2.3 Action Alternates:

Use the *Action Alternates* screen to indicate an alternate action email or fax address from the one that is listed within your data.

Example: The email address in your customer database is not the address desired for use with a specific Alert Action. **Enter** the original email address then the desired *alternate* address, along with the specific *Alert* and *Action* ID. Info-Alert will now substitute the *alternate* email address when *Action output* is called for while running this alert.

Type	Fax Number or Email ID	Alternate	All	Alert ID	Action ID
E	sales@sampleco.com	salesMgr@sampleco.com	<input checked="" type="checkbox"/>		
E	sample@sampleco.com	AR@sampleco.com	<input type="checkbox"/>	S00001	SamDunn

Record: 1 of 3

Type:

Enter an 'E' for email or 'F' for fax to identify the type of ID you want to use.

Fax or Email ID:

Enter the *fax number* or *email address* to replace.

Alternate ID:

Enter the *fax number* or *email address* to be used instead.

All:

Select this checkbox to have Info-Alert replace this ID for all alerts.

Alert ID:

Enter an *Alert ID* if you want to replace this ID only for a given alert.

Action ID:

Enter an *Action ID* if you want to replace this ID only for a given action.

NOTE: Be sure to uncheck the All check box if this exception will be used with a specific *Alert* or *Action*. The All setting will override any additional settings for this exception.

TIP: The *Action Alternates* can also be used to send copies of Action emails to more than one recipient. **Example:** A Sales Order acknowledgement can be sent to your customers and a copy sent to your sales rep by configuring the *Action Alternates* in the following way: *Email ID:* *sampleco@samco.com* and *Alternate ID:* *SO@samco.com*, plus a second record: *Email ID:* *sampleco@samco.com* and *Alternate ID:* *salesrep@mycomp.com*. Using *Alternates* in this way, an action email using *sampleco@samco.com* will now be sent instead to both *SO@samco.com* and *salesrep@mycomp.com*.

2.4 Action Address:

The *Action Address* screen provides for alternate layouts of company and address information. **Example:** You might create an *Address ID* of 'Adrs_Fax' that would show the full logo, company name and full address. Another *Address ID* might be 'Adrs_Email' that would just show the logo and the company name.

If a logo is to be used, enter the file path where the fax transport can find your logo bitmap file. This file must be in BMP format. If you wish to use the logo with an email, you will need to enter the path to the logo file available to the internet, as this file if left local, will not be found remotely. **Example:** <http://sampleco.com/images/logofile.bmp>

NOTE: The MAIN and TEMPLATE Address ID's are created by default during installation. The MAIN ID is initially used for the Sample Actions included with the Sample Alerts and the TEMPLATE ID is required for any Action Templates used.

Further examples of the *Action Address* use can be found earlier in this section under *Configure Actions*.

2.5 Notification Events:

The *Notification Events* screen allows for output configuration of alert results to many different destinations, local or remote. For instance, an *Event* could be set up to update the customer comments table of your accounting data when Info-Alert has automatically sent a 'Late Notice' letter.

Enter a *Map ID* and associated *Alert ID* or use the *binoculars* to view all existing *Events*.

To Create a New Event:

Enter an appropriate name or ID for this Event and give it a description.

General Tab: Information:

Enter any additional information about this event that will help identify it from other events.

TIP: To use a previously created stored procedure that will run as an event, configure one using the *Run Stored Procedure* tab. If you are unfamiliar with stored procedure, you can manually create the event code by using the *Adjust Table* tab.

Run Procedure Tab:

Use this tab to assign an existing stored procedure to this event,
OR use the *Adjust Table* tab (outlined later in this section) to build a manual *Event* command.

Procedure Name:

Indicate the name of the stored procedure to be used.

Pass Data Source To Procedure:

Check here if you want Info-Alert to pass a data source to your stored procedure.

Data Source:

Choose whether this event will use the data source indicated in the associated alert or use another data source that can be chosen in the Data Source pull down box.

Adjust Table Tab:

Use this tab to manually create Event code that can be executed based on any alert code results.

Notification Events

Map ID: [IASampleMDB] Event ID: [CredY/N]
 Alert ID: [S00003] Description: [Set Credit Y/N]

General | **Run Procedure** | **Adjust Table** | SQL Cmd

Edit Records Use Data Source From Alert Remote Source: [SAM] Adjust Table: [tblCustInfo] Refresh
 Append Records Use Remote Data Source

W/hr	Remote Field	Op	IA Field	Value	Len
<input checked="" type="checkbox"/>	[AccountId]	[=]	[AccountId]	[0]	[0]
<input type="checkbox"/>	[CreditOnFileYN]	[]	[]	[0]	[0]
<input type="checkbox"/>	[*]	[]	[]	[]	[]

Delete

Edit Records:

Select this option if this event will be adjusting an already existing record in your remote data.

Append Records:

Choose this option if this event will be adding a record to your remote data.

Use Data Source From Alert / Use Remote Data Source:

Choose whether this event will use the data source indicated in the associated alert or use another data source that can be chosen in the Remote Source pull down box.

Remote Source:

Enter the data source that is configured for your remote data. This may be different from the data source that the alert is using.

Adjust Table:

Enter the table name in your remote data source that you wish to adjust or publish data to. Use the Refresh button as needed.

Whr:

Select this check box to designate this line as a *'Where'* clause in the Event code. If this box is left blank, IA will assume that the line will be for *'update'*. **Example shown here:** The Whr box is checked indicating that the first line is a *'Where'* clause that will use the second line to update the 'tblCustInfo' table 'CreditOnFileYN' field to '1' where the 'AccountId' in 'tblCustInfo' matches the 'AccountId' returned in the alert result.

Remote Field:

Enter a field name from the remote data that will be used in each line.

IA Field:

Select the appropriate field in the pull down that comes from the results of the associated alert. No entry needed for an *'update'* line.

Value:

Enter a data Value. This entry will tell IA what to enter into the indicated data field of the remote data source using an *'update'*. In the example, we are updating the 'CreditOnFileYN' field with a '1'.

Len:

If the size of the field in your remote table is less than the amount of data from IA that will be published you should enter the maximum size in the *Len* field, or an error will occur.

Adjust SQL CMD Tab:

Use this tab if you are going to use your own SQL code instead of the IA SQL wizard in the Adjust Table tab.

The screenshot shows the 'Notification Events' dialog box with the 'SQL Cmd' tab selected. The 'Map ID' is 'IASampleMDB', 'Alert ID' is 'S00003', and 'Event ID' is 'CreditYN'. The 'Description' is 'Set Credit Y/N'. Under the 'SQL Cmd' tab, there are two radio buttons: 'Use Data Source from alert' (which is selected) and 'Use remote Data Source'. To the right, there are fields for 'Remote Source' and 'Append Alert Field'. Below these is a large text area for entering the SQL command. At the bottom, there are 'Delete' and 'Check Fields' buttons.

Use Data Source From Alert / Use Remote Data Source:

Choose whether this event will use the data source indicated in the associated alert or use another data source that can be chosen in the Remote Source pull down box.

Remote Source:

Enter the *Data Source* that is configured for your remote data. This may be different from the data source that the alert is using.

Append Alert Field:

Choose the *field* within the alert record that you would like to append.

Run on first record only:

Check this box if you would only like to run this event on the *first record only*. This can be handy during testing of the event as it will only effect the first record in the returned alert results.

SQL Code Entry:

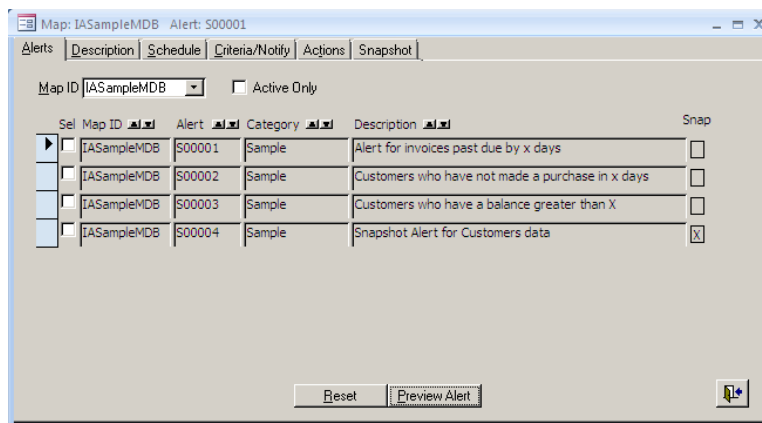
Select this space to enter your SQL code. This space can also be populated by cutting and pasting SQL code from another SQL code generator.

3.0 Main Menu: Alerts – Select Alerts

3.1 Select Alerts List

Use the *Select Alerts* screen to view and configure any pre-defined and published custom Alerts. From this screen you have the ability to *Preview* any alert without effecting history or alert output. This is also the screen that allows for the final configuration, scheduling, and selection of which alerts are looked at when the *Info-Alert Server* runs.

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



The alert list shows us all the alerts available for each *Map ID* or Alert package. The following examples will use the list of 'sample' alerts included with the *IASampleMDB Map ID* which was installed during the initial *IA* installation.

Use the *Map ID* pull-down to select a desired map which will show only those alerts that are associated with that *Map ID*.

Check the *Active Only* box to quickly show only those alerts that have been selected to be processed when the IA Server runs. (Those Alerts with a 'check' in the *SEL* column).

TIP: After selecting the *Active Only* box, you can use the scroll bar to the right of the alerts list to easily see how many alerts are flagged to be processed. Once you click on the scroll bar a pop-up message will show the record count.

Use the ▲ ▼ buttons to sort each column within the alert list as desired.

Double Click on the *SEL* column to quickly bring to the top all the 'flagged' (checked) alerts selected to be processed by the *IA Server*.

Choose the *Reset button* to return the alert list to its default display.

3.1.1 Preview Alerts: (Manually Run and Test Alerts)

Select an alert from the *Select Alerts* screen 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* at the bottom of the *Alerts tab* to launch the 'Alert Test Wizard'.

Fill-in the filters and/or parameters as needed to test this alert for connectivity and access to your selected data. The filters and parameters shown on any individual alert will vary based on the logic provided by the 'Alert Developer' when creating the alert.

NOTE: These *From/Thru* filters and *Logic* parameters allow great flexibility to the user during the alert setup process, as various alert results can be derived by using the same alert. These various 'filtered' results shown during this preview process can be used during final alert setup to configure multiple alert sequences. Alert Sequences are discussed later in this section.

Choose and *Action ID* from the pull-down, if one or more have been created for this alert. The creation of IA Actions are detailed later in this guide.

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.

Choose the *Reset button* to quickly clear the existing criteria settings and test another filter.

Select the *Queue button* to view any Action outputs if an *Action ID* was selected

NOTE: If errors are generated during this preview process there may be issues with the alert code, action or data source you have selected. These errors will need to be resolved

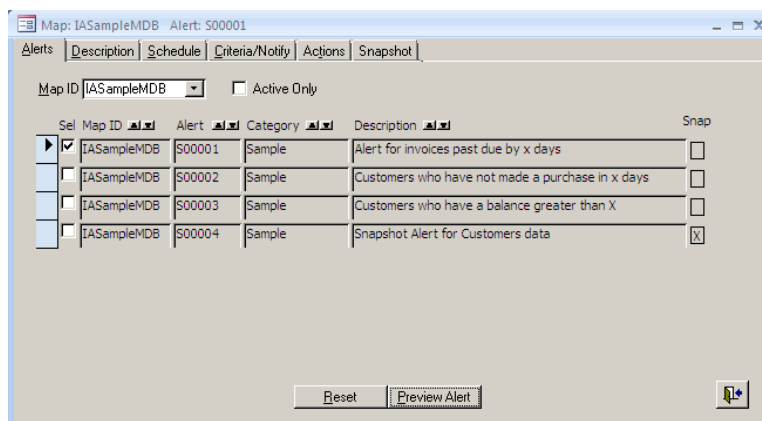
before running this alert in a 'live' setting. Use the *Display SQL Command* box to view the runtime code which includes any *From/Thru* filters or *Logic* parameters of the alert.

- 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. Use the *Submit Queue* button to view any Action output available

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

3.1.2 Configure and Select Alerts for LIVE Processing: (Examples of multiple Alert Sequences)

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.

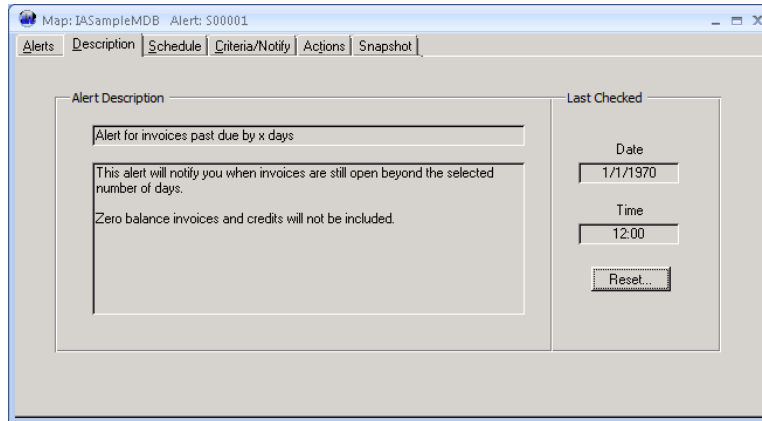
Place a *Check* in the box to the left of the Alert. This will set the alert for processing by the Info-Alert Server during its next scheduled run. (See *IA Server scheduling* later in this document). Un-checking this *SEL* column will place this alert in a 'Preview only' state but will retain any setup filters/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.

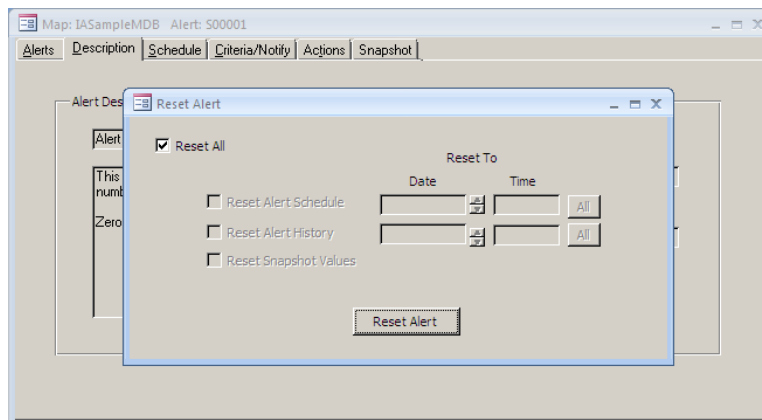
- TIP:** A single Alert can be configured with multiple sequences or records. This allows the ability to configure the same alert with different Criteria, Actions, and Notifications and even Data Sources.

Description Tab:

Select the **Description** tab to view a detailed description of every alert. You can also see what date and time this alert last ran.



Choose the **Reset button** to view the reset options for this specific alert.



Check Reset All to clear all alert schedule, history and snapshot values for this alert.

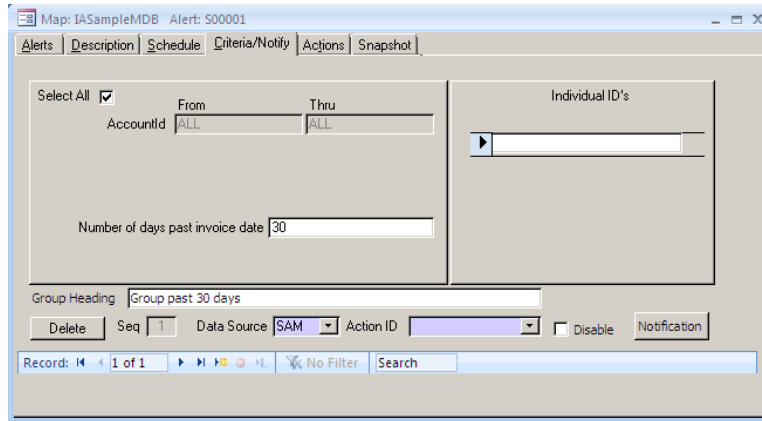
Check Reset Alert Schedule and enter a target date and time to reset the alert's last run time to the indicated date.

Check Reset Alert History and enter a target date and time to clear the alert history records for this alert to the indicated date. This setting can be used in conjunction with the **Reset Alert Schedule** to allow an alert to notify on records that it has already processed.

Check Reset Snapshot Values to reset any snapshot values that may be stored for a specific snapshot 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 configure an alert with multiple sets of *criteria*, *data sources* and *notifications*. (This example uses the Sample alert S00001).

Check the *Select All* box to request no *From/Thru* filtering. Or enter the appropriate value in the *From/Thru* or *Individual* sections to filter the output results of this alert sequence.

Enter number of days ‘Invoices Past x Days’ to further limit your criteria. (This parameter is available to the alert in this example based on the logic provided during the alert development). See the *Tool Kit* section later in this document for a discussion on how this logic relates to the alert code).

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

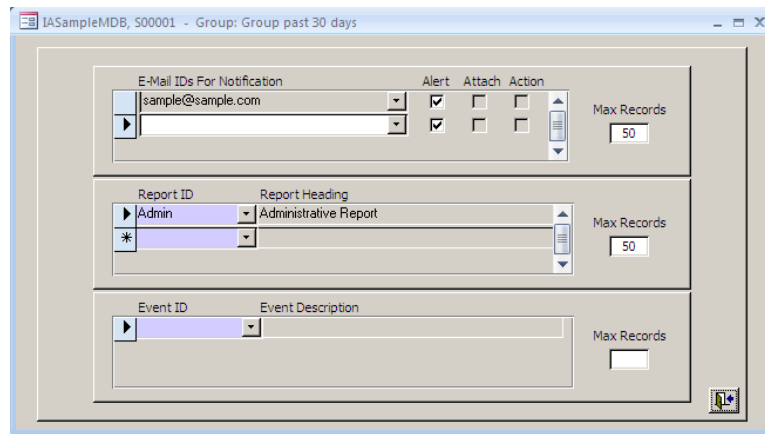
Select an associated *Action ID*, if Actions have been previously created for this alert, to provide additional result output to files or external email and fax output. (See the *Actions and Events* section later in this manual).

TIP: You can change the fields used for criteria by using the *Alert Field Selections* option on the *Configure Options* in the *Main Menu*. (You may also choose specific criteria as allowed by each alert using the *Individual* 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 in this example 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 basic alert text.



Enter an *Email ID*, or multiple addresses of those you want notified of this alert by email. (Info-Alert Email Setup must be properly configured to allow for email output. See the *Admin Configuration* section of this manual for *IA email setup*).

Enter a *Report ID* from the drop down list that was previously setup in the *Configuration Options-Define Reports* to point to a particular printer for a printed output of the alert. (There must be at least one valid printer defined in the Windows print applet of this machine to allow for successful IA Report output).

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.

Alert box is checked by default and will provide the specified recipient with the basic Alert Text output defined within each specific alert.

Attach box is un-checked by default and works in conjunction with an Action that may be configured for this alert. The *Attach* feature allows for a properly configured Action to send a specific file to the *Notification email recipient* indicated.

Action box is un-checked by default and works in conjunction with an Action that may be configured for this alert. The *Action* feature allows for a properly configured Action to send the configured Action email or fax output to the *Notification email recipient* indicated.

Event ID is for advanced users and is explained in the *Notification Events* section of this manual.

Close the *Notification* form to return to the *Criteria* screen for this alert.

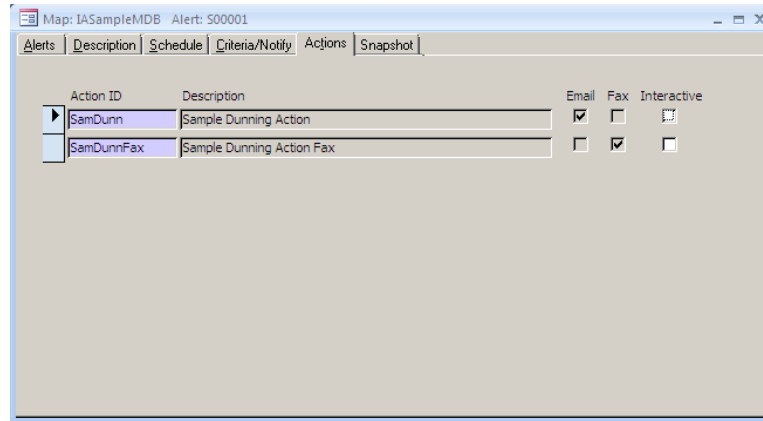
Alert Sequences:

Setup any additional 'criteria groups' and notifications for this same alert using another *Alert Sequence*. These additional groups will show as multiple records or *Alert Sequences* for the

same alert on the *Alert Setup* screen. **Manage** these sequences using the record selector at the bottom of the *Alert Criteria* 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.

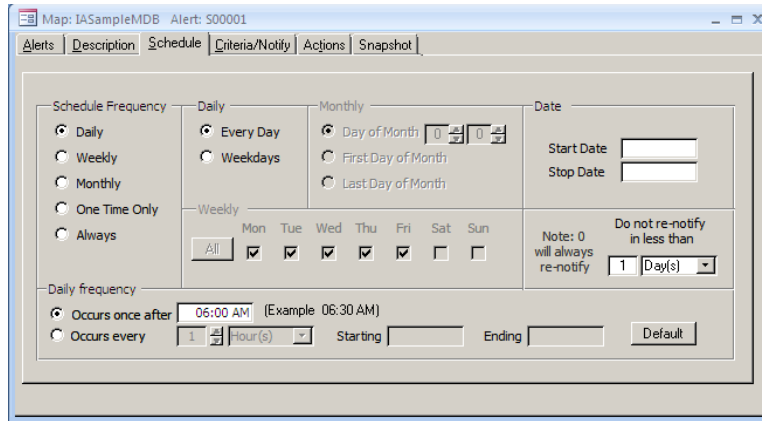


- **NOTE:** As always with IA, you can **‘drill down’** to the indicated form when you see the blue background within a field, as seen here with the *Action Id*. The grayed check boxes are shown for a quick status of the email or fax settings in a particular action.
- **TIP:** Use the *Interactive* check box to toggle the ‘interactive’ switch of the indicated *Action ID* just as you would if viewing this action from the *Configure Actions* form.
- **NOTE:** Alert Actions are discussed in the *Configure Actions* section of this guide and various IA bulletins.

3.1.3 Alert Scheduling:

Schedule Tab:

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



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 actual *days of the week* and *frequency* you would like to be alerted on a particular alert. EXAMPLE: You have an alert that would meet your needs but only wanted it to run every Friday.

Set a *Start* and *Stop Date* if you want to further limit the timeframe this alert will be valid for an IA Server run. **Typically**, this setting is not used as the *IA Server* timeframe is globally controlled by the 'Windows Task Scheduler'. (See *IA Server Scheduling* later in this guide).

Set the *Daily Frequency* as desired. Typically set for 'once a day' but can also be set for multiple times a day. **Remember** this setting dictates how often you need to schedule the *IA Server* run using the 'Windows Task Scheduler'. (See *IA Server Scheduling* later in this guide).

Select the amount of time you want to pass before being alerted on the same record using the *Do not re-notify* dialog box. **EXAMPLE:** If this setting is set to 1 week, and we had an alert 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, as in this case, would IA re-notify

NOTE: The ability of the *Do Not Re-notify (DNR)* 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. If desired *DNR* times are over 90 days, **Best Practice** is to adjust the alert code to limit the time frame of alert results instead of increasing the DNR time and amount of alert history saved.

NOTE: The same *Alert Schedule* applies to ALL *Alert Sequences* within an individual Alert.

TIP: Set the *Schedule Frequency* to 'Always' and the *DNR* to '0 days' to allow this alert to output all results whenever the *IA Server* is ran. This is a great setting to use when testing alerts multiple times a day, but is rarely used in a 'live' environment.

3.1.4 Snapshot Setup:

Snapshot Alerts can be used to monitor fields in your database for changes. These special alerts can be created using the optional IA Tool Kit and is detailed later in the *Tool Kit* section of this manual. For example customer credit limits might be monitored to see when someone changed terms or an alert can be generated when an inventory items product line has been changed, etc.

Snapshot alerts differ from other alerts in the sense that once an alert is generate the base criteria resets itself (another snapshot of the data is taken). Once a *Snapshot alert* has been created and published you can configure it much like any other alert and use the *Snapshot tab* to further adjust.

Snapshot Tab

Use this tab to view the limits available for this Snapshot based the creation of this alert by the alert developer. This Example based on Sample Alert S00004.

Field Name	Any	Change Type	Change Amt
AccountId	<input checked="" type="checkbox"/>		0
CreditOnFileYN	<input checked="" type="checkbox"/>		0
Fax	<input checked="" type="checkbox"/>		0
Balance	<input type="checkbox"/>	Percent	+ or - 5
Email	<input checked="" type="checkbox"/>		0
	<input type="checkbox"/>		

Change the limit settings to match your specific Snapshot needs as allowed.

Notification Output similar to the screen shown here will be available during a *Preview* of this alert or during the actual running of this alert using the IA Server.

```

Thursday, August 27, 2009          Info-Alert          Page 1 of 1
10:41 AM                          Alert On Demand

Evaluation Copy - Not for Resale
-----
Alert ID  Alert Text                                     Source: SAM  Action:
Alert: S00004  Customer data monitor
           All Records Selected
S00004  Customer 15003, Joe Cartwite has a monitored field change
           Field: Fax
           Old Value: 555-555-1239
           New Value: 555-555-1255
-----
End of Sample Alerts

```


The fields that meet your alert criteria will show up in your alert output with the alert text that was used in the alert design. This example shows a change to a customer's fax number.

3.1.5 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.

The *IA Server* is the main 'engine' of Info-Alert and will launch various processes including:

- **Process** any alerts with a check in the *SEL* column of the *Alert Manager Select Alerts* screen based on their individual *Alert Schedules*.
- **Process** any *Email* or *Fax* output manually checked for submittal within the *Fax Manager* and Action *Submit Ques*.
- **Launch** a simple script to create a *backup* of the *IA database* and locate this .bak file in the IABackup folder within the InfoAlert root directory. This process will occur at the first running of *IA Server* each day.
- **Synchronize** the *IA Templates* (Access Reports) within the *InfoAlertTpl.adp* file with the *IA Server* (*InfoAlertSvr3.adp*). This synchronization will only occur if the *Update Templates* option is checked in the *MISC* tab of the *Admin Information* screen and will automatically be un-checked after the successful *IA Server* run.


 **NOTE:** The 'Windows Schedule Tasks Utility' can be found in Control Panel on Windows XP/2003 machines and in Admin Tools on Windows Vista/2008/Win7 machines.


Open '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 how often you want *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**.

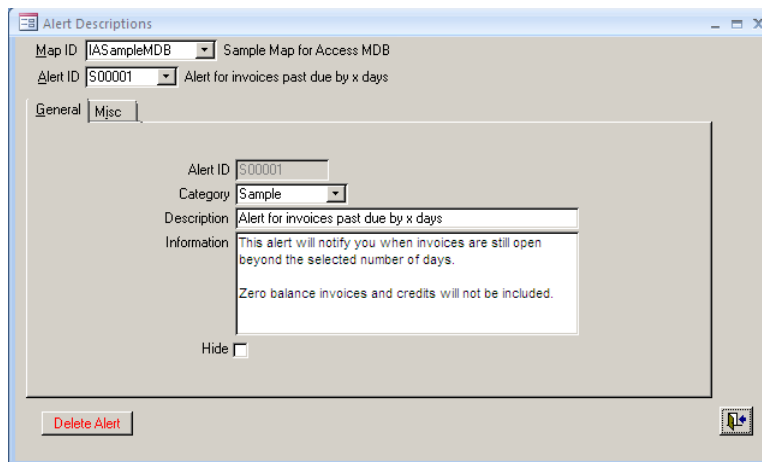
 **IMPORTANT:** Verify the setting option for '*run task if user is logged on or off*' is selected, as the *IA Server* will need to run even when the indicated user is not logged in.

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

3.2 Alert Descriptions:

Change an alert's assigned category or adjust the summary description by using the *Alert Descriptions* function found under the *Alerts* menu. The *Description* and *Information Detail* is used to identify an alert throughout the application.



A **detailed description** can be assigned to each alert to better describe how it should be used. Enter or change this information at any time to provide additional information to the user.

Hide individual alerts you may check the *Hide* checkbox on this screen. Note: To hide groups of alerts use the *Alert Categories* function shown above.

Delete an alert use the *Delete Alert* button on this screen. Note: All configuration information attached to this alert will be deleted. Deleting an alert can come in handy when importing a WFI file with the same alert name using the 'Do Not Overwrite' option in the WFI Import.

Use the *MISC* tab to 'Reset' the last 'autorun' date and time of an individual alert without having to clear the flags. Very useful during the testing and initial setup of an alert, or more specifically when many alerts are running and you want to clear the history of only one.

Check *Reset All* to clear all alert schedule, history and snapshot values for this alert.

Check *Reset Alert Schedule* and enter a target date and time to reset the alert's last run time to the indicated date.

Check *Reset Alert History* and enter a target date and time to clear the alert history records for this alert to the indicated date. This setting can be used in conjunction with the *Reset Alert Schedule* to allow an alert to notify on records that it has already processed.

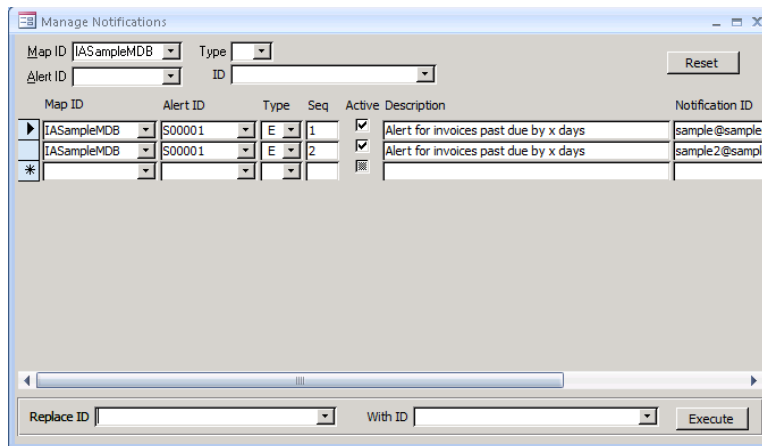
Check *Reset Snapshot Values* to reset any snapshot values that may be stored for a specific snapshot alert.

3.3 Manage Notifications:

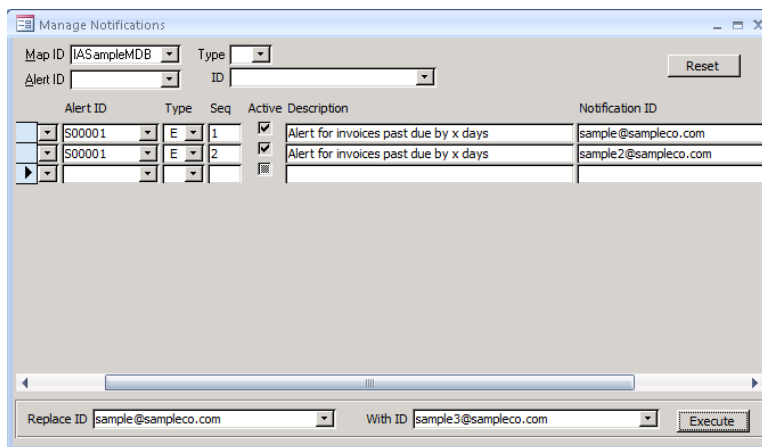
Easily view and manage all *Alerts* currently setup within the *Select Alert List*.

Use the pull-down filters at the top of the screen to show specific *Map ID* , *Alert ID*, and *Notification ID* selections, or leave filters blank to show all configured alerts.

View various attributes of Alert configurations, such as: Alert Sequences, Active Alerts, Notification ID's, and Notification Action Status.



Use the *Replace ID* and *With ID* locations to easily make global changes to the *Notification ID* value.



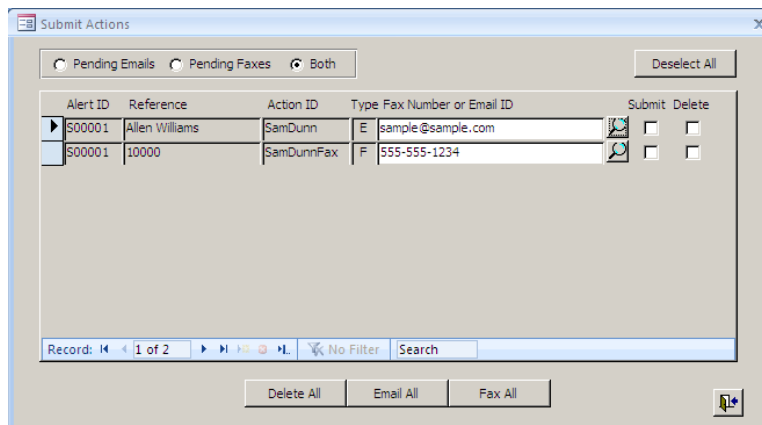
In this Example: Change all notification email addresses currently designated sample@sampleco.com to the new email address of sample3@sampleco.com.

4.0 Main Menu: Alerts - Processing

4.1 Submit Actions:

The Submit Actions screen works in conjunction with the Interactive check box at the top right of the Actions Setup screen and provides for the 'queuing' of email and/or fax output prior to sending. This allows you to view the list of outgoing actions and control which ones will be set for output, adjusted, or deleted and not sent. Checking the Submit column will flag those action outputs to be processed at the next Info-Alert Server run.

NOTE: This Submit Queue is also very useful when 'previewing' alerts. If an alert is previewed with an Action, the intended Action output is held in this Submit queue for viewing. This allows the end user to see the output that would be sent without actually sending it. (See the Preview Alert section in this guide for further details).



Pending Email / Faxes or Both:

Choose what type of output actions you want to view and submit, fax, email or both.

Alert ID, Alert Description, Type, ID:

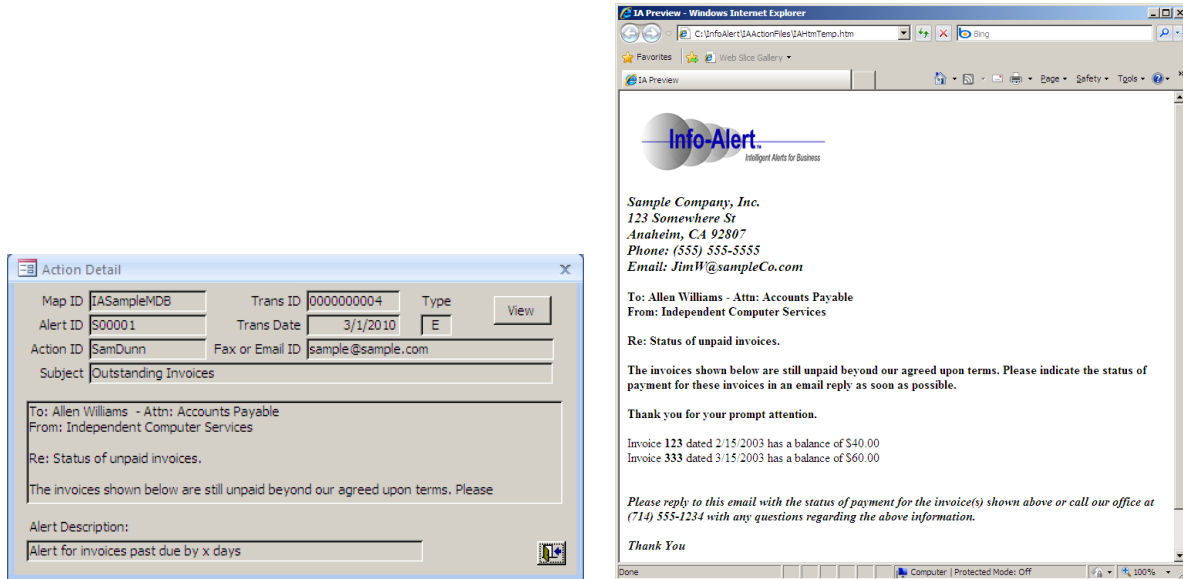
Each record queued for output will be listed here and available for review.

Submit or Delete:

Choose the Delete All, Submit Emails or Submit Faxes buttons to globally select the required records or manually check each record using the Submit column.

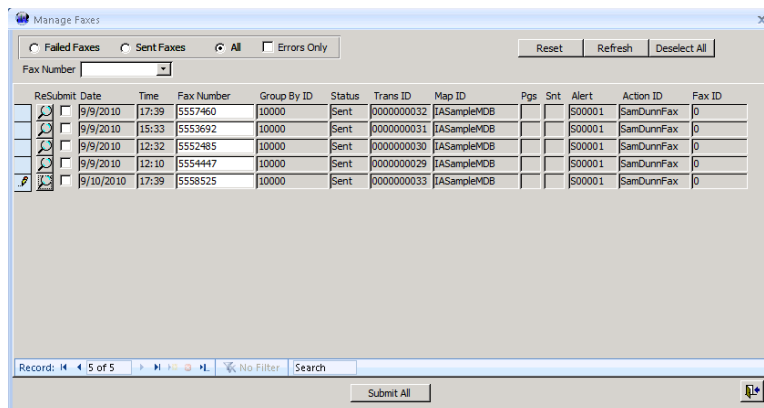
Spyglass:

Select the Spyglass button to view the details of each action ready for output. This is a quick way of insuring that the final output is what you want, otherwise you can delete it. The following screen is a sample Action Email Output viewed through the Submit Queue Detail button.



4.2 Manage Faxes:

Use this screen to manage the fax log interactively, much like the Submit Actions screen does for Actions. This screen can also accessed from the Fax Setup tab of the Admin Configuration menu.



Filter View

Choose the desired Filter to show faxes in the Re-Submit Queue for Failed, Sent, All or Errors Only.

Status


The status column is updated on every *IA Server* run and will show the status of each fax record as it was prior to the last IA Server run. (Use the Refresh button to show the current status).

Delete

Fax records can be deleted from any of the logs by selecting the left most column of the record and pressing the 'Delete' key on your keyboard. You can select one or many for this process by using the 'Shift' or 'Ctrl' keys as with any Microsoft application.

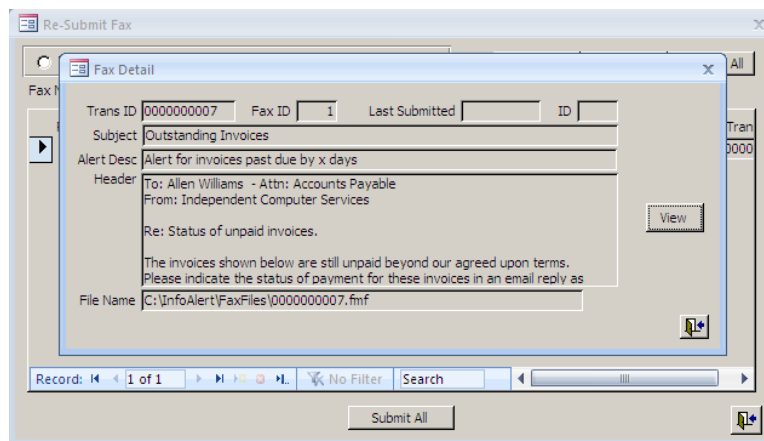
Reset / Refresh / Deselect All

Select the Reset button to reset the view after using any of the Filter buttons. Use the Refresh to update the log view. Use the Deselect all to remove all of the selected faxes.

 **NOTE:** Click on the column headings to sort by each as desired.

Show Detail

Select the magnifying glass to bring up summary information on an individual fax that can help determine if the fax should be resent, viewed and printed, etc. The Last Submitted / ID fields will show the original date and Fax ID given to this fax record if a previous 'resubmittal' of this fax was attempted.

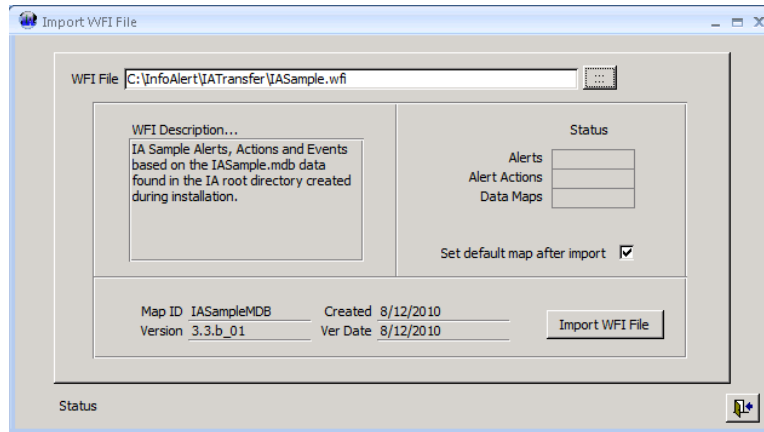


View

Select the View button within this Detail View to see the fax as it would look after it had been sent. This also can be handy to use in identifying what the actual contents of the fax is. Again, you can print from this view to make a hard copy.

4.3 Import WFI File:

A 'Work Flow Intelligence' file can be imported at any time using this menu selection. Please see the *WFI Creation and Import* in the *Tool Kit* section of this manual for details on the creation of a *WFI file*. A *WFI file* holds alert logic, actions and events that are particular to a given database or application.



Browse to the location of your *WFI File*. If provided by your software vendor the *WFI file* could be on a separate CD or floppy. After selecting, verify its description before continuing.

The *Set Default Map after Import* check box is selected by default and will set this *Map ID* as the default map within the *General* tab of the *Admin Information* screen.

Select the *Import WFI File* button to start the import process.

View the *Import process* status in the lower left of the form and press *OK* to the "Successful" message when complete.

Your alert package or *Work Flow Intelligence* (WFI) package should now be ready for setup and use within the local *Alert Manager*. **Configure and use** these newly installed alerts as you would any other alerts.

Create WFI File:

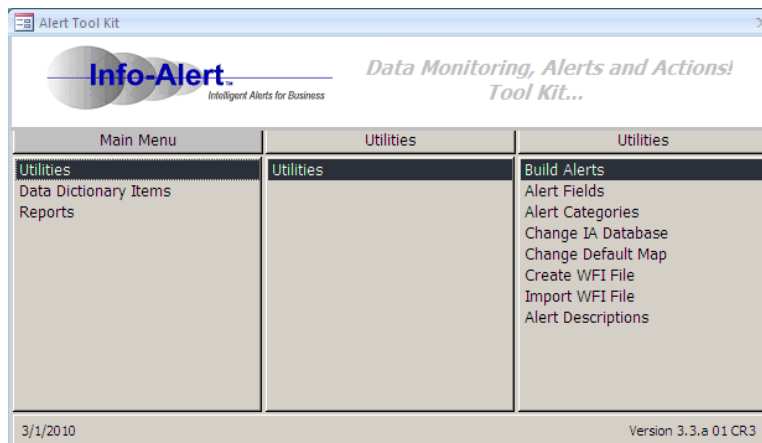
Use this function to create WFI files for archive or distribution to other compatible *IA Manager* environments. Steps to create and distribute *Work Flow Intelligence (WFI)* files are discussed in the *Tool Kit Section* of this manual.

Info-Alert Tool Kit (Optional)

Info-Alert's *Tool Kit* allows you to add custom alerts to pre-defined *Data Maps* and configure Info-Alert to work with additional sources of data in the creation of new data maps.

This section outlines the steps necessary to create a sample 'MS Access' *Data Map* and an alert using the *Data Map Wizard* and *Build Alerts* functions. The Tool Kit is installed by default in an 'Evaluation' mode and can be activated to 'Full' upon purchase.

Please contact your Info-Alert reseller with any questions regarding the use of the Tool Kit or to obtain a full activation.



Info-Alert can connect to various data sources including MS SQL Server, MS Access, MS Excel, and other sources where an ODBC driver has been provided for connection to Microsoft products – *(Please see “Issues and Exceptions” at the end of this document for further connection information).*

5.0 Tool Kit Menu: Utilities – Utilities (Create Custom Alert)

Once data maps are completed you can use the Info-Alert *Utilities-Build Alerts* from the *Tool Kit Menu* to create a new alert.

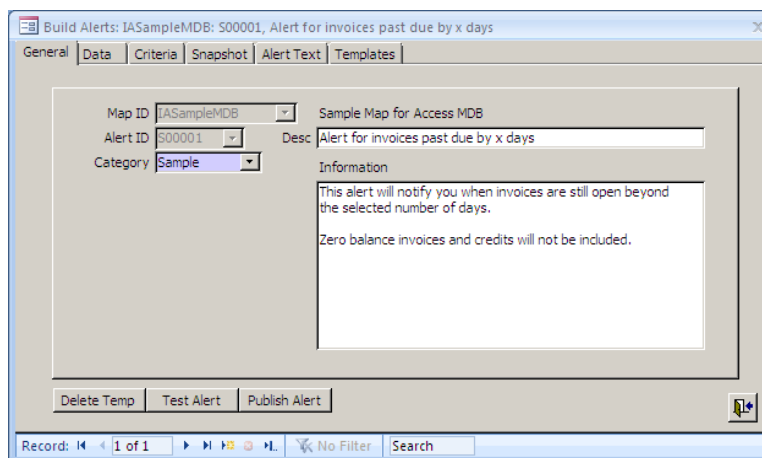
The following alert creation sample will use the pre-defined 'Sample' *Data Map* (IASAMPLEMDB). These same steps can be used to CREATE or COPY alerts, for or from, any existing *Data Maps*.

- 🌐 **NOTE:** Use the *Build Data Map* section of this manual for detailed steps to create a new *Data Map*, if desired.
- 🌐 **TIP:** Please run through the example as shown to make sure everything is working correctly, then feel free to create additional alerts to better familiarize yourself with the capabilities of the Tool Kit.

5.1 Build Alerts:

General Tab:

Choose the *Data Map ID* pull down to select 'IASampleMDB', the IA sample data map.



Enter a new *Alert Id* such as 'Test01' and give it a brief description.

OR

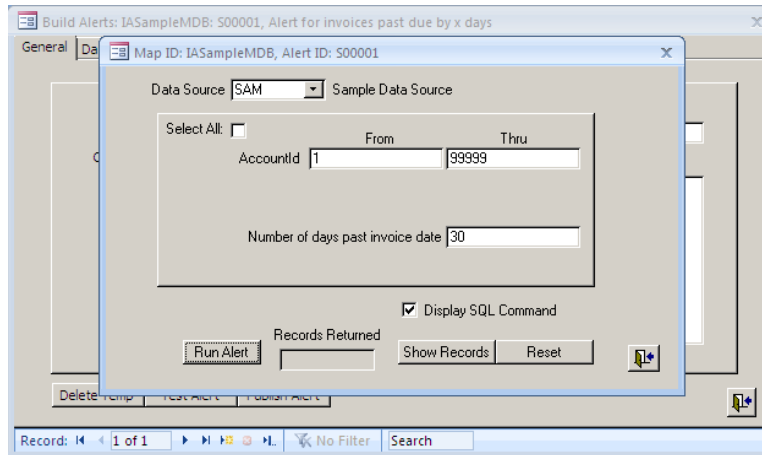
Enter a new *Alert Id* such as 'Test01' and hit the TAB key to bring up the *Copy From* box at the top right of the screen allowing you to choose and copy one of the existing alerts, such as 'S00001'.

Enter a *Category* of 'Sample'.

Enter a summary description and a detailed description of the alert you are creating in the *Desc and Information* box.

Selecting the *Delete Temp Record* button allows you to clear any custom alert configuration prior to publishing. You can have multiple records of custom alerts you are working on and are able to switch between them at any time. *These Pre-Published alerts will be saved here until deleted and have no interaction with alerts in IA Manager until Published.*

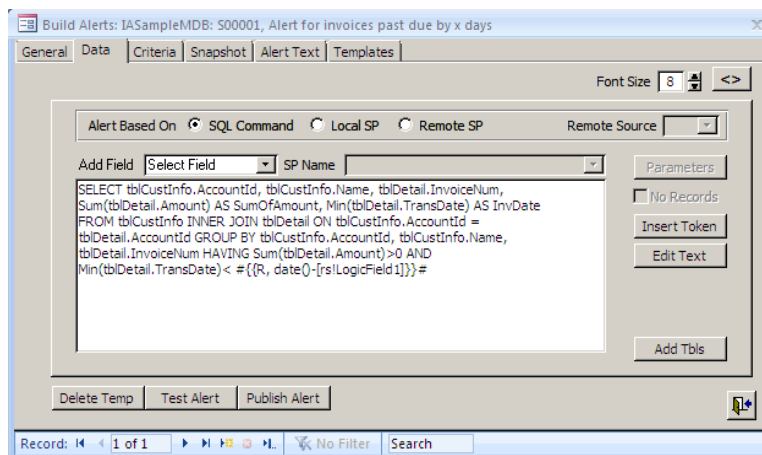
Selecting the *Test Alert* button allows for 'on the fly' testing. Any custom alert will need to have a successful test in order to be published. See the *Test and Publish Alerts section* later in this manual.



Selecting the *Publish Alert* button publishes a successfully tested custom alert to the local *Info-Alert Manager* and will be available there for configuration and scheduled use. **Once published**, the WFI creation process can be used to distribute this new alert to other IA environments.

Data Tab:

The SQL Command is what drives the alert. Use this *Data Tab* to generate the command by typing it directly into the box as shown here or by using a query builder tool such as a view in SQL Server or a query in MS Access, then cut and paste the SQL code.



Use the *Font Size* and *<> button* to adjust the code view as desired.

Use the *Insert Token button* to provide runtime variables. See the *Using SQL Tokens section* later in this manual.

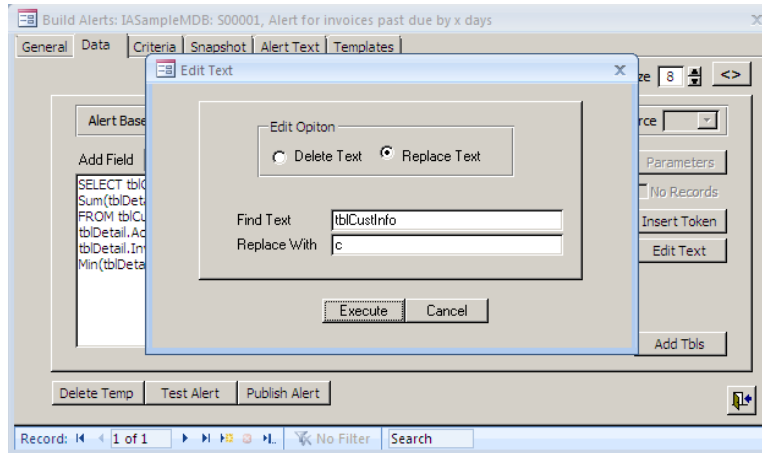
Use the *Add Tbls button* to allow Info-Alert to see and use any new tables included in the SQL code that is not already included in the specific Data Map.

Select the *Edit Text* function to globally change text inside your Data SQL command.

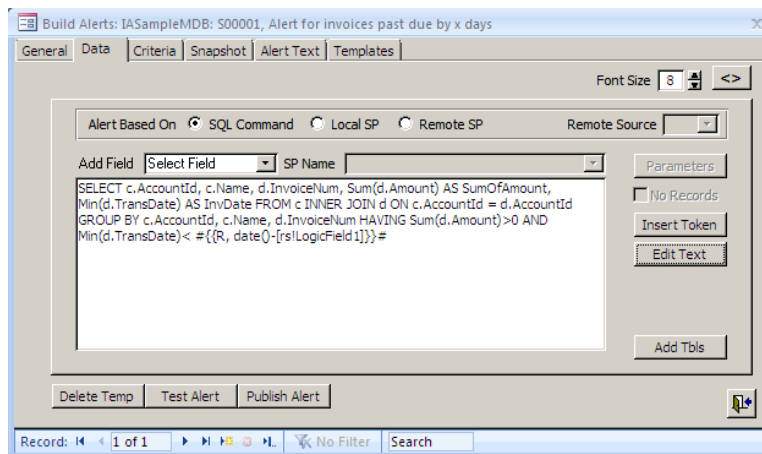
The following example changes absolute table names to aliases:

Press the *Edit Text* button then select the *Replace Text* option.

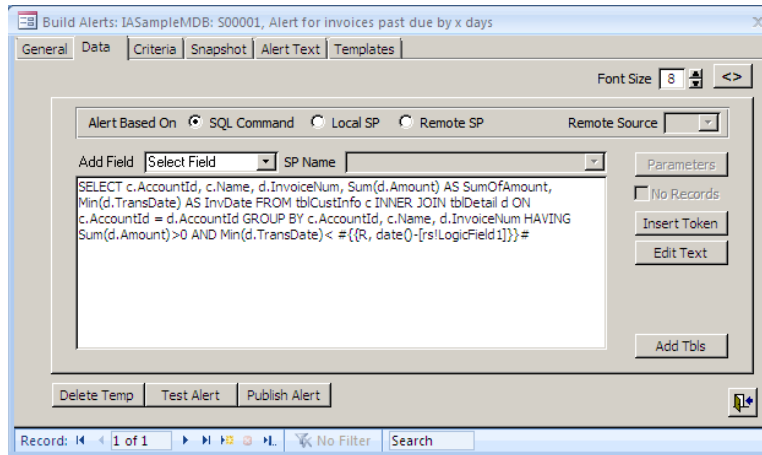
To change the reference to tblCustInfo to a single character, or alias, insert the text as shown below.



Press the *Execute* button to make the changes to your SQL text. Run the same function again to change the reference of *tblDetail* to the letter *D*. You will end up with the text as shown in the screen below.



Here the table names in the FROM clause were also replaced with our alias. We need to undo the alias replacement within the FROM clause to again show the table.



Notice that we have inserted the table names that we are going to alias just after the FROM clause and INNER JOIN. Using an alias for long table names can help substantially reduce the size of your SQL command.

Use the *Edit Text* command to delete text that you do not want or need in your SQL command. This is especially useful if you have a leading reference to your table names because you have copied your text from MS Access, Excel or another query generator. For example CPU.dbo.tblCustInfo can be changed to tblCustInfo by deleting all CPU.dbo.xxxxx references.

NOTE: The syntax of the above SQL command may be different based on what Data Source Type you are connecting to; the above sample is connecting to a Source Type of M2, *Microsoft Access*.

For example: If connecting to a Source Type of E1, **Microsoft Excel spreadsheet**, a select statement based on the data within the IASample.xls spreadsheet that would alert us to any customers whose credit date will expire within x days would look like this:

SELECT accountid, name, creditexpiredate FROM [sheet1\$] WHERE creditexpiredate < #{{R,date()+[rs!LogicField1]}}#

In this command *accountid*, *name*, and *creditexpiredate* are all fields from the IA sample spreadsheet known as *sheet1\$* and *#{{R,date()+[rs!LogicField1]}}#* represents a calculated date based on the current date + the number of days a user entered in the logic field. Notice the syntax differences between the Excel command at the table name and the logic field entries.

TIP: Also note that the text shown above inside the double curly brackets *{{...}}* can be automatically inserted using the *Insert Token* button. Please see “How to use the SQL Token” section later in this manual for more information.

5.1.1 Using SQL Tokens:

In the previous sample code there was a *Token* added. All data inside the double curly brackets {{ and }} is a token that Info-Alert processes by inserting or computing user defined data into the SQL statement during alert generation. In the example shown above the “S” after the opening brackets indicates that we will insert the data found in *LogicField1* into the command. If the user indicates that they want all balances greater than 500 to be alerted the command above will put the amount 500 after the > sign.

If you want to return a result to the SQL command you would use the letter “R” in place of an “S”. An example would be `SELECT * FROM tblARHist WHERE InvDate < #{{R, date() – [rs!LogicField1]}}#` would actually return `SELECT * FROM tblARHist WHERE InvDate < #2/15/05#` (or similar).

Criteria Tab:

Enter the desired runtime *Criteria* (Primary, Secondary, Individual) as desired. These settings allow you to customize what criteria will be available to the end user in the form of *From/Thru* and *Individual* entries on the *Alert Setup screens* in IA Manager.

Enter a *Logic Field Description* to prompt the user for information used to generate the alert. The *Logic Field* entry is based on the optional use of *SQL Tokens* within the SQL alert code.

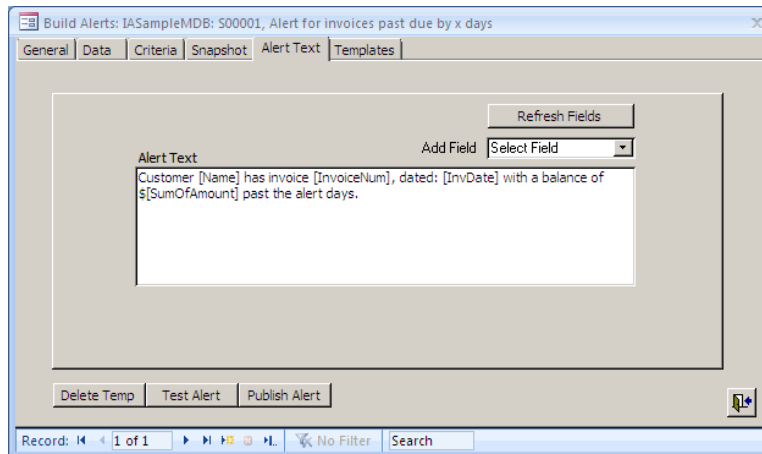
In this example: ‘Number of days past invoice date’ will be the phrase that the alert administrator will see when setting up this alert after it is published to the IA Manager.

Enter a *Unique Key field*. Info-Alert allows for the ability to not only schedule how often to check for an alert but also how often to re-notify you of the same alert results. This ability is handled by assigning a unique “record key” in history. This example uses *AccountId* and *InvoiceNum* for the *Unique Key* field ID.

- 🌐 **NOTE:** This *Unique Key* is used by the 'Do Not Re-Notify', or *DNR*, setting within each alerts *Schedule tab* found in the IA Manager. See the *Alert Scheduling* section of this manual for more details on how the *DNR* relates to the alert result output.

Alert Text Tab:

Enter a brief amount of *Alert Text*. The text entered inside the brackets will be replaced by actual data from the database representing the field name. This text will be used by Info-Alert to notify recipients designated in the *Notification screen* of the *Alert Setup*.



Use the *Refresh Fields button* and *the Add Field pull-down* to add desired data variables.

- 🌐 **TIP:** It's important when building an alert to make sure that the field names you put inside the brackets are exactly as they are found in your database. You can use the *Add Field* option to pull fields directly from the data dictionary.
- 🌐 **TIP:** Inside any numeric field, such as [Balance], insert a comma and number to format the output decimal places. (i.e. [Balance,2] which would be shown as xxxx.xx)

5.1.2 Manage Templates:

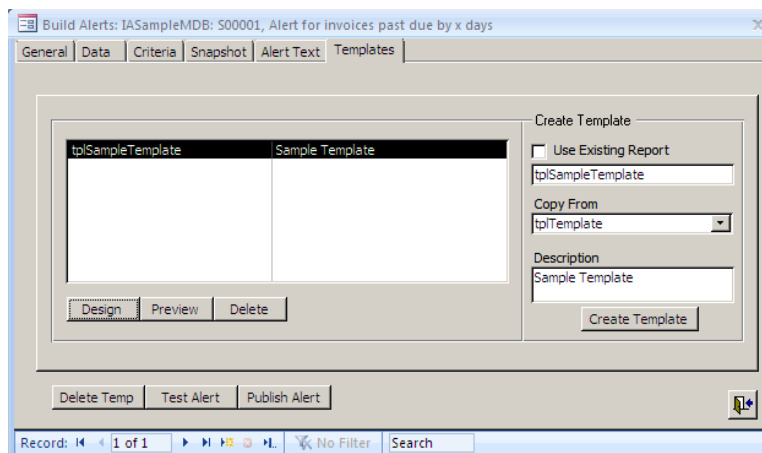
Templates are MS Access reports that may be formatted and used with your alert output to provide a more elaborate, richer display of your data. Boxes, lines, logos and sub-forms may be used in your template design.

Individual templates are associated with unique alerts. The data returned from alert logic is directed through the selected template for output. When designing a new template, data fields defined in your alert will be available for use.

- NOTE: Templates, (or Access Reports), are saved in the InfoAlertTPL.adp file found in the InfoAlert root directory. This file will need to be transferred along with any exported WFI file that contains alerts using any custom Templates.

Template Tab:

Select the Create Template button after entering the needed information to Create new, Copy from, or Edit an existing IA Template.



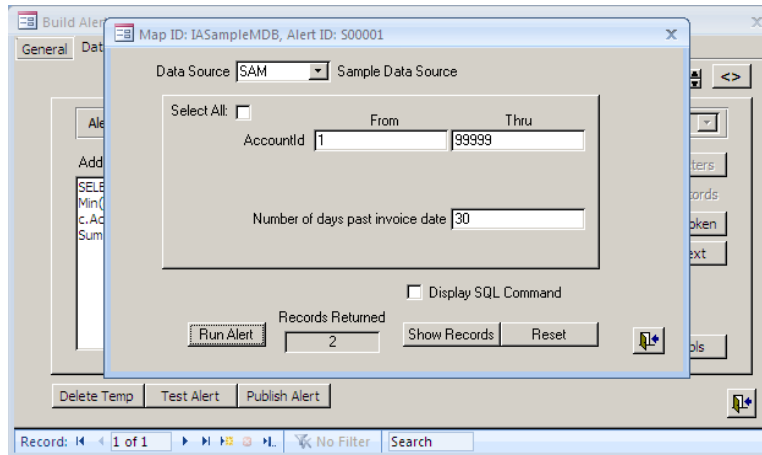
Use the area to the left to manage one or more templates available for Design, Preview, or Deletion.

- NOTE: You must have FULL version of Microsoft Access installed on the machine that you are running the IA Tool Kit on if you want to 'View' or 'Edit' a template as this screen will automatically run MS Access to allow for you to perform these processes.

5.1.3 Test and Publish New or Adjusted Alerts:

Once you have entered your SQL code, Criteria and Alert Text you will need to test it for accuracy prior to publishing it to the Alert Manager for actual use.

Press the Test Alert button to see the following screen.



Check the Select All box or **Enter** valid criteria to return results from your data source, also **Enter** values for any logic fields required for this alert.


Check the Show SQL Code box to display the actual code with any criteria selected that will provide the result set.


Press the Run Alert button to test this alert using the indicated data source.

After showing the alert code, Info-Alert will provide the message box: “Generated (x) Sample Records – press Show Detail to review”.

Select the Show Detail button to view the Alert Text Notification for this alert test. If you want to make any changes in your alert wording just select the Alert Text Tab and make adjustments.


Sunday, December 11, 2005		Info-Alert	Page 1 of 1
1:54:13 PM		Build Alert Sample Records	
Start Alert: S00001			
Alert	Alert Text	Retest Key	
S00001	Customer Allen Williams has invoice 123, Dated: 2/15/2003 with a balance of \$40 past the alert days.	10000123	
S00001	Customer Allen Williams has invoice 333, Dated: 3/15/2003 with a balance of \$60 past the alert days.	10000333	
End of sample alerts...			


 **NOTE:** You must successfully return alert records, using Criteria and Logic, to finish and save your alert.

 **TIP:** If you see any errors be sure to check your *SQL command*. Many times the error will give you an indication as to what was wrong with the command. Also it's important to check the *Alert Text* screen to verify that the field names in brackets are valid field names in your database and that they would have been included in the record set returned by your SQL command.

If everything looks ok then press the *Publish* button to write your alert to the *local* Alert Manager making it available for setup and scheduling just as any of the pre-packaged alerts.

Once your alert is completed you can run the *Alert Manager*, select the appropriate *Data Map* and test your new alert as discussed earlier in this guide.

 **DEVELOPERS TIP:** Use the *Create WFI File* from the *Tool Kit* or the *Alert Manager*, described earlier in this document, to transfer your new alert(s) and its components to other IA Managers. This allows for the distribution of 'Product Specific' or custom data maps and alerts to be easily imported to any applicable Info-alert environment through the installation of a single WFI file!

 **TIP:** Use the *Create New Data Map* and *Create New Alert* sections of this guide to see how easy it can be to attach and alert on data within a MS Excel spreadsheet.

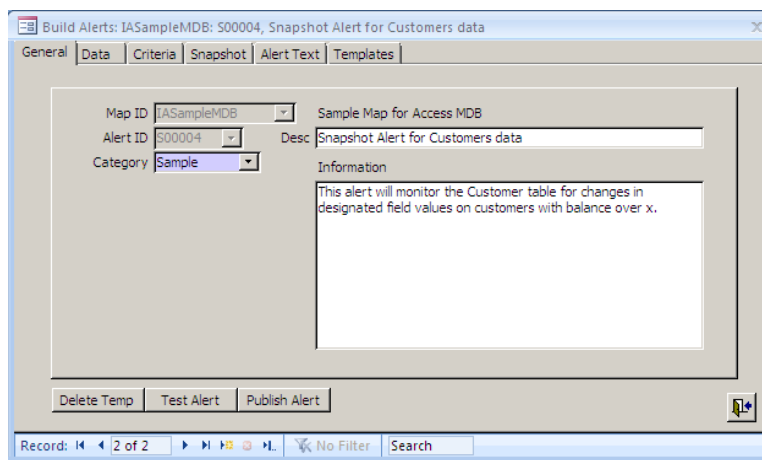
5.1.4 Snapshot Creation:

A *Snapshot Alert* is another type of alert that can be designed to monitor fields in your database for changes.

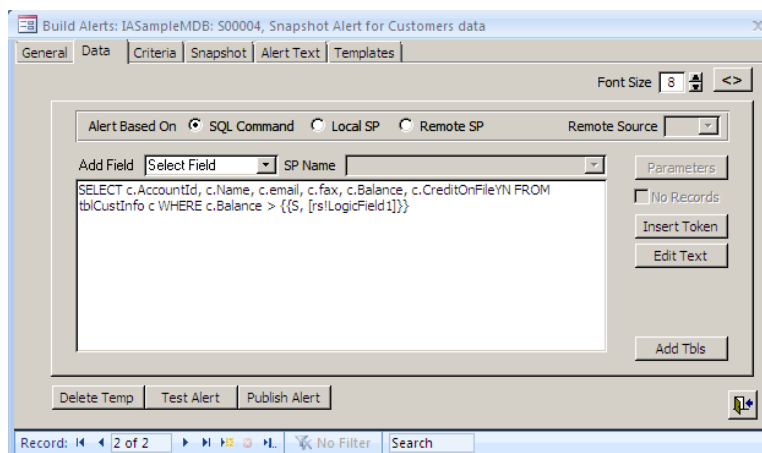
For example: Customer credit limits might be monitored to see when someone changed terms or an alert can be generated when an inventory items product line has been changed, etc.

Snapshot alerts differ from other alerts in the sense that once an alert is generated the base criteria resets itself, (another snapshot of the data is taken). This snapshot data will be used for comparison against the results every time the Snapshot Alert is scheduled to run. Create a Snapshot Alert in much the same way as you would a regular alert.

Choose a *Map ID*, *Alert ID* and *Descriptions*.



Add logic to drive your alert based on the *Snapshot* results desired.



In the simple alert above we are monitoring customer data in the *MS Access sample database*, installed with Info-Alert, for the specific fields shown. The results generated from this code will be available to the Snapshot criteria that will be setup next in the *Snapshot tab*.

NOTE: You can also assign alias fields in your SQL command to monitor the change of multiple fields, for example ... Balance1 + Balance2 + Balance3 as BalTotal would allow you to take a snapshot of the total of those fields and report on the net change.

Assign any *Criteria* or runtime *Logic* that might apply to your *Snapshot results*, just as you would with a regular alert.

The screenshot shows the 'Build Alerts' window with the 'Snapshot' tab selected. The window title is 'Build Alerts: IASampleMDB: S00004, Snapshot Alert for Customers data'. The interface includes several sections:

- Data Field / Heading:** A table with three rows:

	Data Field	Heading
Primary	AccountId	Account Id
Secondary	Name	Name
Individual	AccountId	Account Id
- Assign Unique Key:** A section with a 'Field ID' dropdown menu set to 'AccountId' and two empty dropdown menus below it.
- User Defined Logic Prompts:** Two text input fields. 'Logic Prompt 1' contains 'Balance Greater Than' and 'Logic Prompt 2' is empty.
- Buttons:** 'Delete Temp', 'Test Alert', and 'Publish Alert' are located at the bottom of the main form area.
- Status Bar:** Shows 'Record: 1 of 2 of 2', navigation icons, 'No Filter', and a 'Search' field.

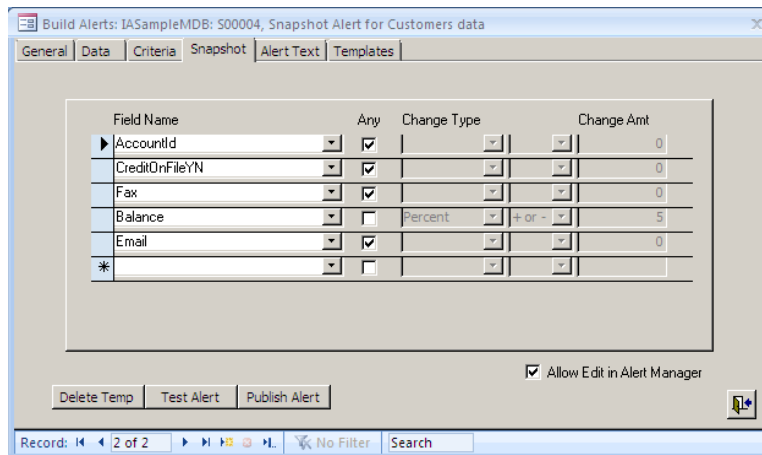
Provide a *Unique Key* as you would with any other alert to allow for the alert results to be compared to alert history based on the *Do Not Re-Notify* (DNR) setting when scheduling this alert for live run.

Snapshot Tab:

The *Snapshot tab* is used to assign fields from the data that you wish to monitor.

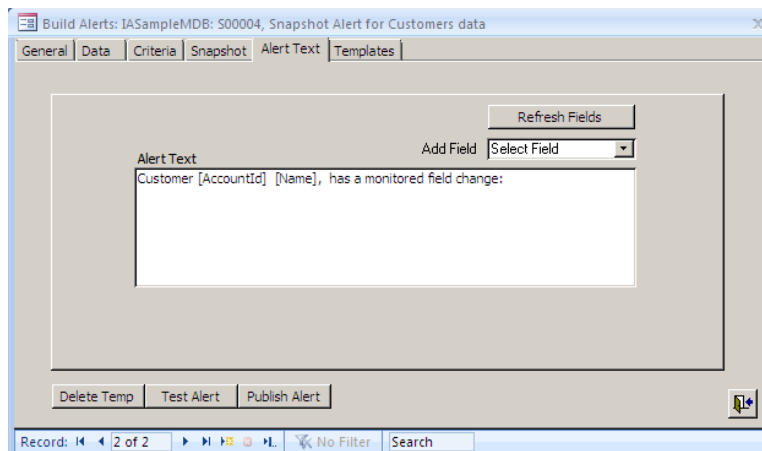
Enter a *Record* and *Change Parameter* for any of the fields provided for by your alert code. In the example shown, use Info-Alert to alert us when any customers who match the logic in the data tab have a change in their Balance (plus or minus) 20%. We can also be notified when the customers Email, Fax or Credit status changes.

Check the *Allow Edit in Alert Manager* box to allow the end users ability to change the *Snapshot parameters* during setup of this alert in the *IA Manager*. Depending on the end users environment and knowledge, this may something to disallow.



NOTE: When alerting on a numeric field you can monitor a change plus, minus or (plus or minus) a certain amount or percent.

Enter the *Alert Text* information in the same way you would a non snapshot alert, with the exception that Info-Alert will automatically add each of the monitored fields indicated on the *Snapshot tab* when an alert condition exists.



Use the *Test Alert button* as you would any other alert to verify your code and *Snapshot parameter* selection.

View the output results, as shown here. Notice that Info-Alert has added the selected *Snapshot fields* to your *Alert Text output*, showing the field values as xxxxx.

Wednesday, August 26, 2009		Info-Alert	Page 1 of 3
1:40 PM	Build Alert Sample Records		
S00004	Customer 10001, John Mint has a monitored field change:	10001	
	Field: Email		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: Fax		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: CreditExpireDate		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: Balance		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
S00004	Customer 12111, Kerry Smithe has a monitored field change:	12111	
	Field: Email		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: Fax		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: CreditExpireDate		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		
	Field: Balance		
	Old Value: [xxxxxxxx]		
	New Value: [xxxxxxxx]		

Publish the alert as you normally would using the *Publish Alert button* to move this new Snapshot alert to the *IA Manager* for final testing and setup.

This alert should now show in the *Select Alerts* screen of your *IA Manager* with an 'X' in the *Snapshot column*. See the Alert Manager *Snapshot Setup section* earlier in this manual.

5.2 Alert Fields:

Use the *Alert Fields* screen to adjust or add criteria fields to an existing alert.

Map ID: IASampleMDB Sample Map for Access MDB
Alert ID: S00001 Alert for invoices past due by x days

Group ID	Field ID	Field Name
2	AccountId	AccountId
2	InvoiceNum	InvoiceNum

5.3 Alert Categories:

Use the *Alert Categories* screen to adjust or add grouping designations for your existing or custom alerts.

Map ID: IASampleMDB Sample Map for Access MDB

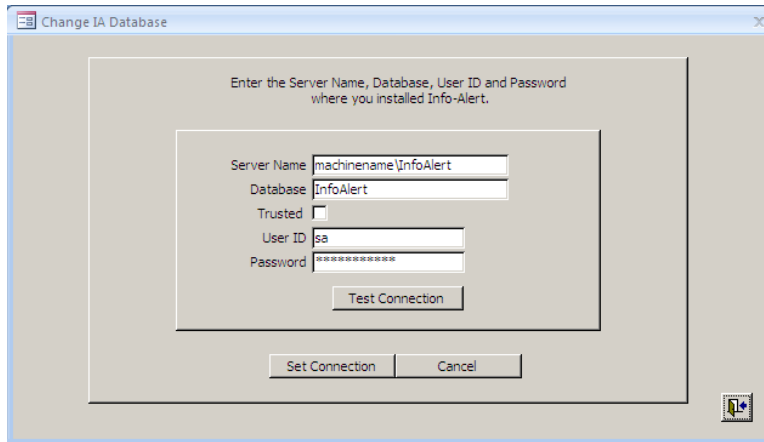
Category	Description	App	Hide
Sample	Sample Category	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Hide All Unhide All

Update

5.4 Change IA Database:

Use the *Change IA Database* utility if you find the need to move your existing IA database to another SQL Server. Use the *Test Connection* button to verify successful access.



NOTE: Having the IA database file on a machine other than the local IA machine is not recommended.

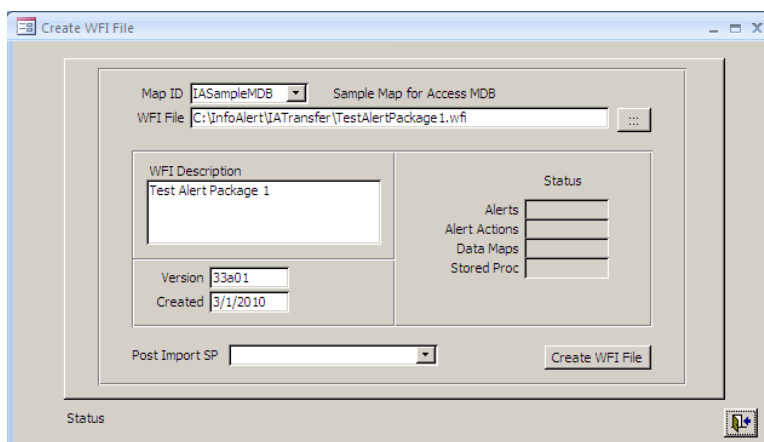
5.5 WFI File Creation and Import (Work Flow Intelligence File):

Once you have created your new custom alert(s) and data map(s), you may want to make them available to other Info-Alert environments. This process is easily achieved using the *Create WFI File* along with the *Import WFI* file utility found both in *Alert Tool Kit* and in the *Alert Manager*. **Complete the following steps to create your custom “Work Flow Intelligence” package and then distribute to any IA Manager.**

NOTE: This process is *not* needed to add new alerts to the local environment. Tool Kit will add any new alerts to its local *IA Manager* upon successful finish of the *Alert Publish* process.

Create a WFI file:

Select *Utilities* from the *Alert Tool Kit* menu and choose *Create WFI File* to show the *Create WFI form*.



Enter the *Map Id* that relates to your custom alerts.


The default path points to a WFI template that will be used to build your custom WFI file and this file name should be changed to help identify the new custom WFI file.


Enter a short *Description* of this map, version and creation date in the corresponding areas.

Alerts, Actions, Events and Data Dictionary data are included in a WFI file. The *Status* column will provide a status view during the file generation

(Optional) Enter an existing stored procedure in the *Post Import SP* area, if required, using the pull-down which will run a custom procedure after the creation of the WFI file

Press the *Generate File* button when ready and view the download status in the lower left of this form.

 **TIP:** Using the default path provided in this form is a good way to keep all your IA transfer files in one logical place. The *IATransfer* directory is created in the install IA root directory during the *Info-Alert* installation.

 **NOTE:** Once the WFI file has been created successfully, it can be copied from the *InstallDir\IATransfer* directory to any media of your choice for distribution to other *Info-Alert Manager* environments. **See the Import WFI section earlier in this guide.**

6.0 Tool Kit Menu: Data Dictionary Items

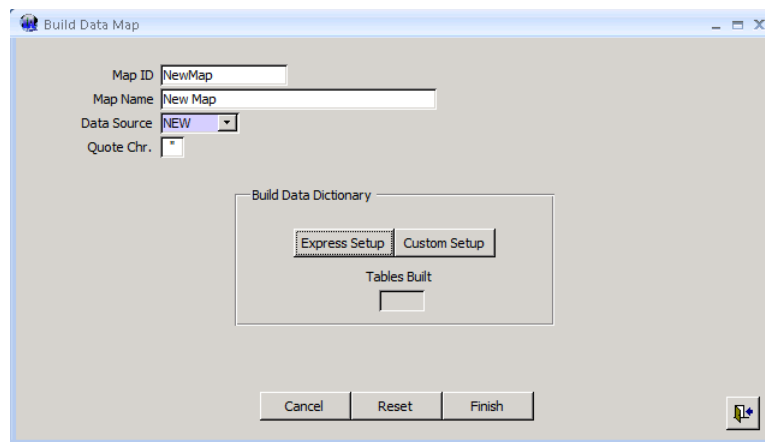
6.1 Build Data Map: (Create New Data Map)

One of the unique benefits of using Info-Alert is that it can be attached to many different databases to provide automated alerts based on certain information within those databases.

The following Example will show steps to create a new *Data Map* using the *IASample.mdb* (Microsoft Access database). This sample database is created in the *InfoAlert root* directory during installation and is used by the default *SAM* map id to provide a selection of sample Alerts, Actions and Events.

TIP: Use the *Map Id's* screen, detailed later in this guide, to easily copy an existing map to a new map or clean up old maps by deleting them.

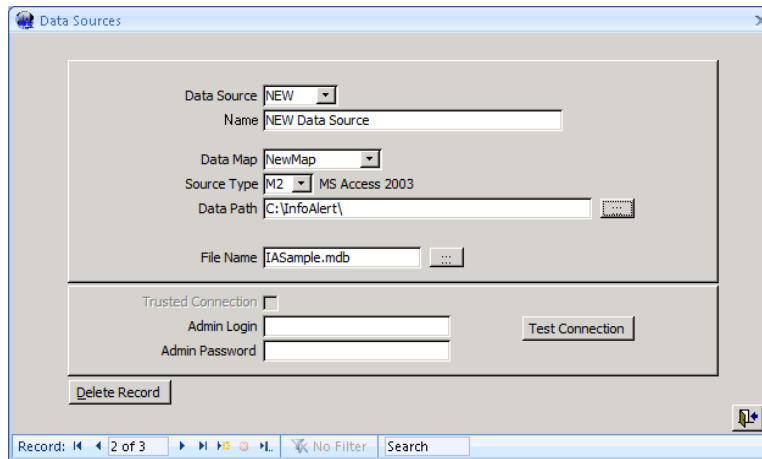
Select *Build Data Map* from the *Data Dictionary* menu.



Enter a *Map ID* and a *Description* of the data you will be attaching Info-Alert to.

Example: uses New Map. ('IASAMPLEXLS' can be used when running the XLS sample database).

Double Click the *Data Source* field to set up a new source. A data source is required to tell Info-Alert where your data is located and what type of data it is. If a data source has already been created, use the pull-down to select a valid ID and skip the following graphic.



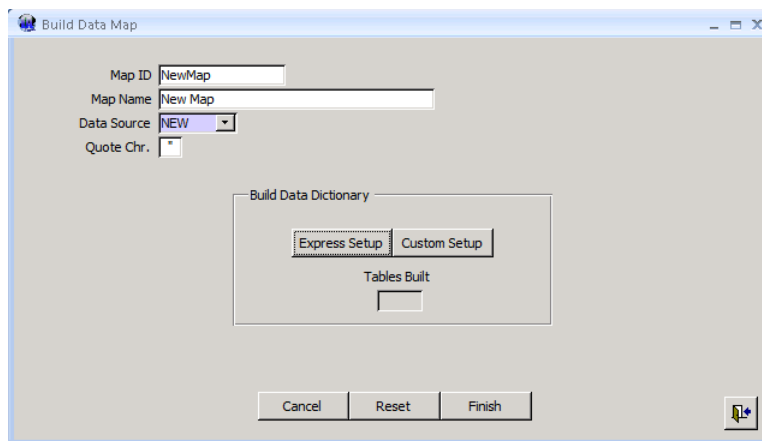
Setup a data source as detailed earlier in this guide if an appropriate one has not already been created. A valid *Test Connection* is required to move forward.

Example: Creates a new *Data Source* called NEW and uses the *IASample* Access database.

Select one of the following two methods of building your data dictionary. *Express Setup or Custom Setup*. In most cases the Express Setup option will provide all the appropriate *Data Map*.

Express Setup: (Typical)

Automatically maps ALL tables and fields in your data source to a new Map ID. Choose *Finish* when Map ID is complete.



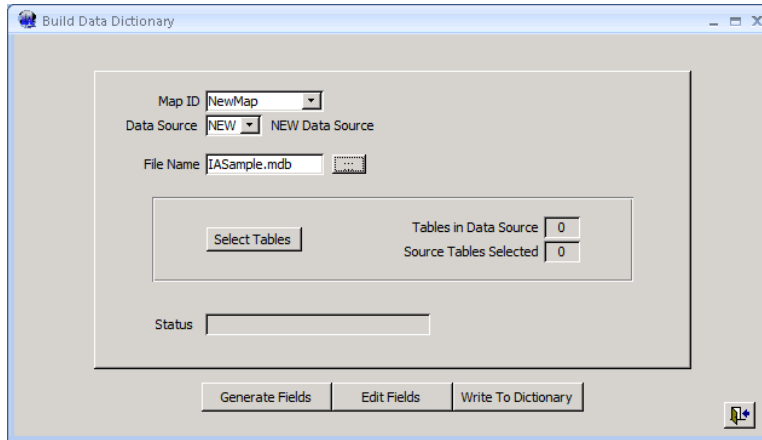
The *Tables Built* will indicate how many tables were created and available to your new *Data Map*.

Custom Setup: (Follow these steps if Express Setup was not used)

Allows you to control what tables and fields are mapped and further allows you to assign different headings to tables and fields as desired. Use the following steps to configure your Custom Map ID settings.

NOTE: These steps can also be used to add tables and fields to an existing Map ID by selecting the Data Map Wizard from the TK Data Dictionary Menu.

Point to the proper Data Source for the intended map, such as 'SAM'.

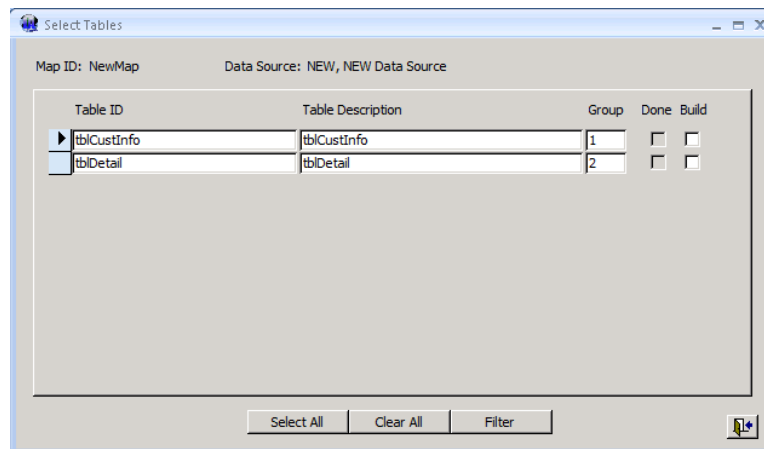


Click on the Select Tables button to see what tables are available in the IASAMPLE.MDB database.

Press the Select Tables button to view the next screen.

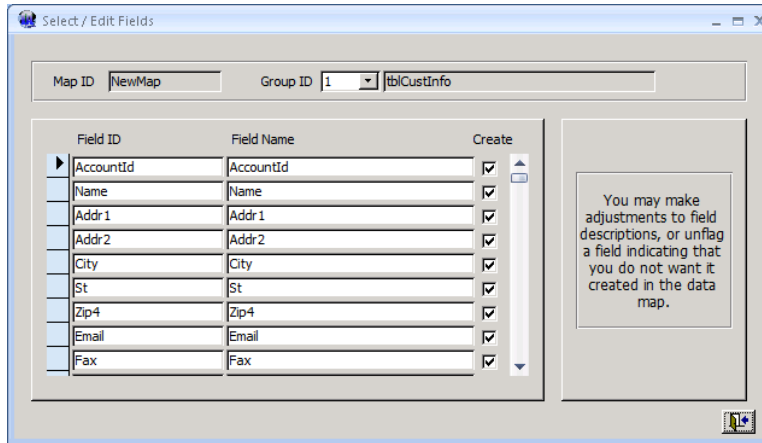
Select the tables to include in your map by checking the Build column and change the descriptions if desired. Use the Select All button to select all tables.

Close the screen when done to return to the Build Data Dictionary screen.



Press the *Generate Fields* button from the *Build Data Dictionary* screen to create a 'temp' table of fields associated with the tables you have selected.

Select the *Edit Fields* button to remove the *Create* flag on a field or change the name\ID as shown here. To do this, select a *Data Group* from the pull-down to indicate which table to use and then 'uncheck' any fields not needed in this map.

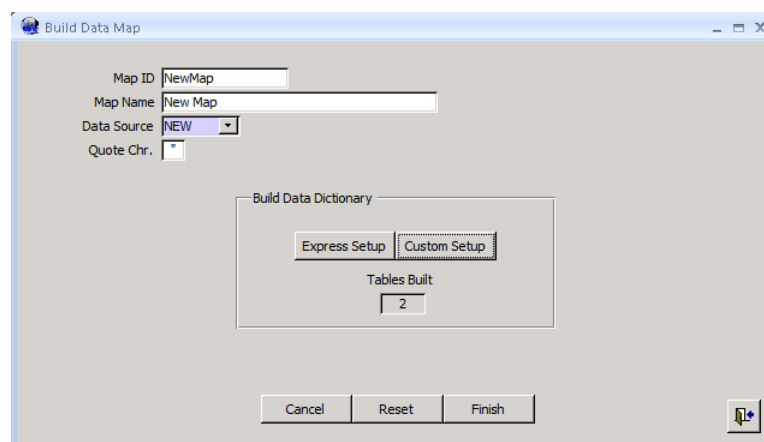


Edit any *Field Names* as desired and **Close** to return to the *Build Data Dictionary* screen.

Press the *Write To Dictionary* button from the *Build Data Dictionary* screen to complete the build process.

Close the *Build Data Dictionary* screen to continue.

This *Map ID* will provide the tables, groups, and fields required for *Info-Alert* to understand the data you want to be alerted on.

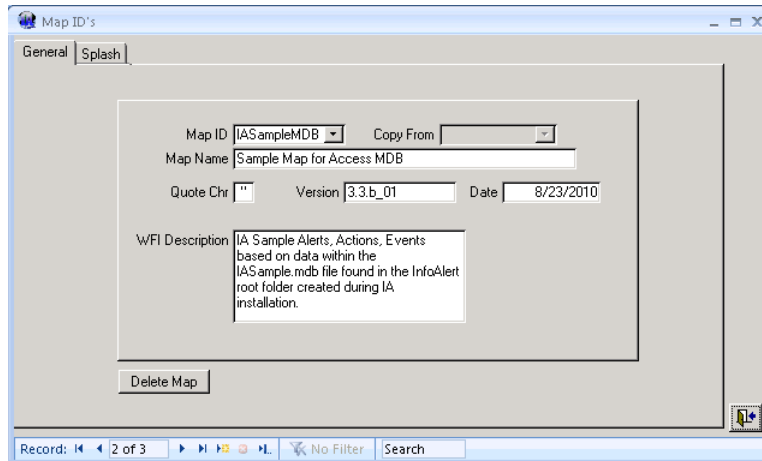


The number shown in *Tables Built* will represent the number of tables built.

Press the ***Finish*** button to complete the process. You are now ready to create an alert.

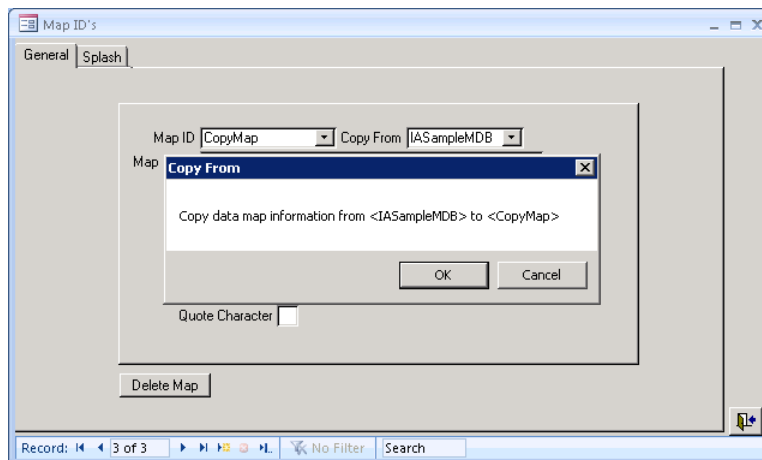
6.2 Map ID's: (Copy / Delete a Data Map)

Use this Map ID screen to view and manage your existing Map ID's.



A new data map can also be created by copying from an existing Map ID.

Select the Map ID's option from the Data Dictionary Items menu.



Select the new record button using the record selectors at the bottom of the Map ID's screen.

Enter a new ID in the Map ID field, "NewMap" is used in this example.

Select a Map ID to copy from. Once prompted, press OK to create your new map.

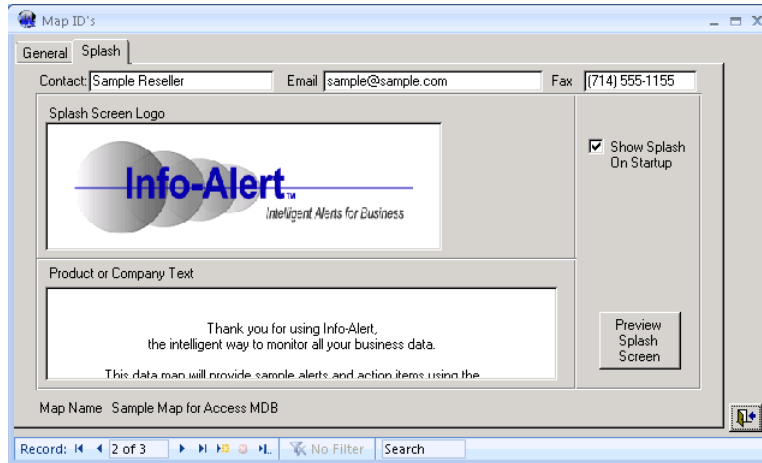
When the map Copy Utility is complete, enter a new Map Name and you are ready to use it for new alerts.

Delete Map

Select the Delete Map button for any existing Map ID to remove some, or all, of that map from the IA database.

Splash Tab

Select the Splash Tab to configure a splash screen for this map that will display when Info-Alert is started, based on which map is set as the Default Map ID.

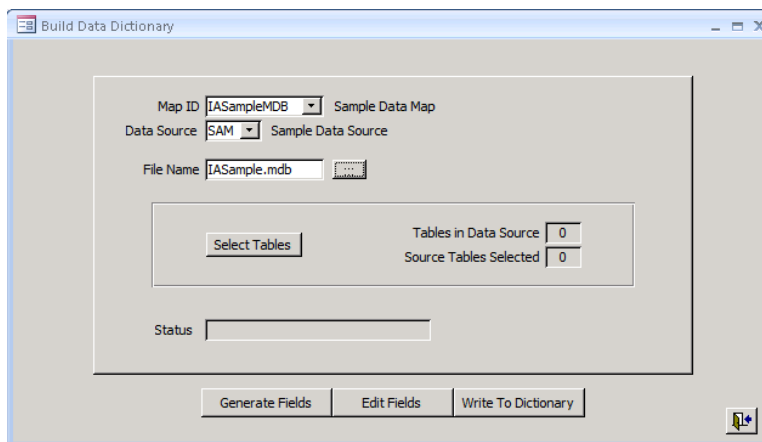


Enter Vender Contact and Vender Email information. These entries will show on the Activation Request Form generated from the Activation screen.

Include a Logo and Enter a Description, both of which will show on the Splash screen each time IA Manager is launched, if configured as the Default Map ID.

6.3 Build Data Dictionary: (Adjust Data Maps)

The Build Data Dictionary screen can also allow for easy adjustment to existing Data Maps. Use this screen to add additional tables and fields (custom fields added to the Data Source) in the Data Map. Settings and steps are much like those completed in the Build Data Map Custom Setup section shown previously in this guide.



6.4 Data Sources:

The *Data source* screen in *Tool Kit* is no different than shown in the *IA Manager* section of this guide, please refer to that section for additional details. Any changes or additional to this screen here in *Tool Kit* will also be available in the *Alert Manager Data Source* screen.

Data Source Id:

Enter a 1 to 3 character ID that will uniquely identify this source.

Name:

Enter a Description for this source of data.

Data Map Id:

Select a Data Map from the pull-down that is to be used with this source of data.

Source Type:

Select the Type of Data you will be connecting to with this data source, “MS SQL Server”, “MS Access”, “MS Excel”, etc. If you don’t see the type of data displayed in the pull down box you can select “DS” to point to a DSN that was previously configured on your workstation with Microsoft’s administrative tools.

NOTE: Since different types of data require unique information, the fields and headings that follow the Source Type will change based on the type entered. The above graphic shows entries based on a MS Access data source.

Data Path:

Enter the File Path of the MS Access database.

File Name:

Enter the Database or File Name that holds your source data.

Trusted Connection:

Check the *Trusted Connection* box if your SQL security model is set and configured to trust your operating system logins. You will not be required to enter an admin login or password.

Admin Login:

Enter appropriate *Admin User and Password*, if you are using SQL Server security.

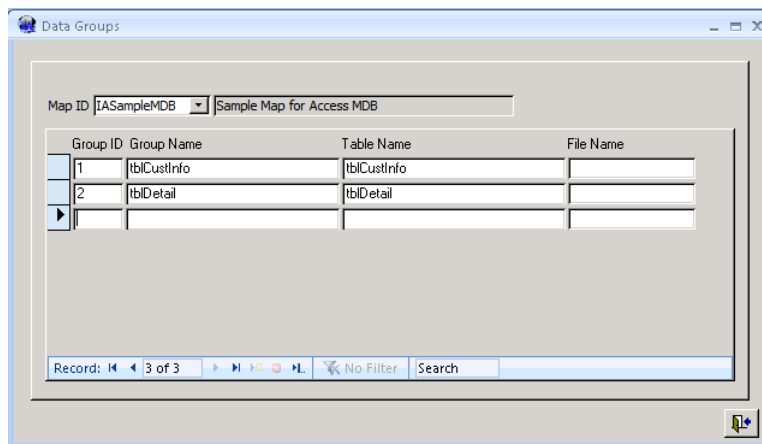
Test connection:

Use the *Test Connection* button to verify a successful connection to the data source.

NOTE: You must be able to create a successful connection to your data source prior to using it in any other Info-Alert function.

6.5 Data Groups:

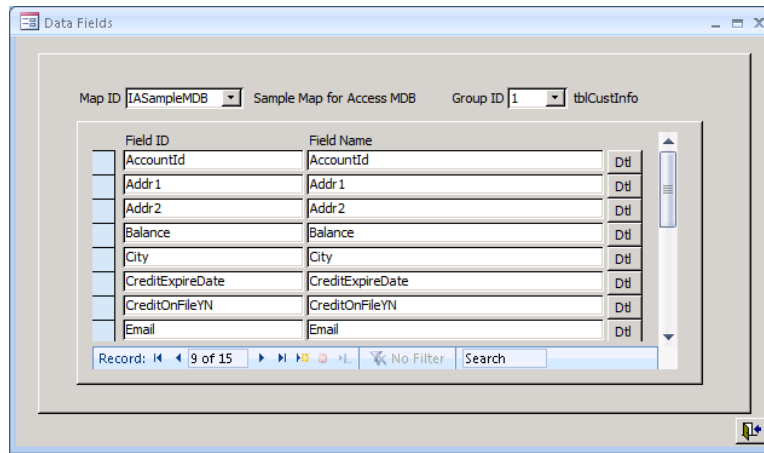
Info-Alert groups the tables within each *Data Map* with a specific *Group ID*. Use the *Data Groups* screen to view and adjust the *IA Data Groups* if needed.



This screen can also be used to add references to new tables that may have been added to the *Data Source* since the creation of this *Data Map*. Simply create a new record in this screen with the needed table information.

6.6 Data Fields:

Use the *Data Fields screen* to quickly view the tables in a specific map based on their *Data Group ID*.



This screen can also be used to add known custom fields to existing or newly added tables.

NOTE: New data tables and fields can also be added to the *Data Map* using the *Build Data Map* function detailed earlier in this guide.

7.0 Tool Kit Menu: Reports - Reports

7.1 Report Lists:

Create quick report lists for *Data Sources*, *Field Groups*, *Fields* and *Map Id's* that are currently configured within Info-Alert.

Open any of the *Menu* items and choose from the available output options to view the reports.

A – 1 Using Stored Procedures

Overview:

One of the unique benefits of *Info-Alerts Tool Kit* and *Alert Manager* is in its ability to use stored procedures to generate alerts.

As it applies to Info-Alert, a stored procedure can best be described as a custom program used to create alerts with complex logic. Most alerts are based on simple commands, ie Alert if balance less than 20 or Alert if SalesRep ID = 123 and sum of invoice amount > 100. This logic can easily be assigned using a single SQL command created by most report writers or query builders.

Using a stored procedure you can get considerably more complex in the logic you use to identify an alert condition. For example you could have an alert check your web based CRM database for any customers that have proposals outstanding for more than 20 days, then check your back office accounting system to verify there is not an outstanding balance for any of those customers more than 15% over their credit limit. For those who meet that criteria check a special promotions Excel sheet for each customer to determine if they should be suppressed from any new activity then generate an alert for those who meet those conditions.

Applying custom logic allows for considerable flexibility in alert generation but also requires technical knowledge to create stored procedures.

Creating a stored procedure:

Stored procedures may be locally created in the InfoAlert database or you can execute a remote stored procedure found in another database. You can open the local Info-Alert database by using MS SQL Enterprise Manager, (if you are licensed to run MS SQL Server tools), or by running the InfoAlertSP.ade program found in your installation directory.

 **NOTE:** You will need a full version of MS Access 2003 to create and modify stored procedures.

Info-Alert ships with a sample local stored procedure called 'IASampleSP'. It is recommended that you use this as a template to copy from when designing any new SP's. There are basically two requirements that need to be included in each local stored procedure. First are the eight parameters that are passed in from the "Alert Manager", and second is the table that gets populated with the alert records at the end of the procedure. Table "tmpIASp" must be populated with the result of the stored procedure.

If you would like to allow for the "Alert Manager" to have user defined selections that a user can easily control you should be sure to include the select logic found in the sample SP. A "where clause" is built based on the passed in parameters that can be appended to any of your select criteria in the procedure.

A – 2 Issues and Exceptions

Excel Sheets:

Info-Alert has been tested with simple row and column spreadsheets. It is unknown at this time what effect Pivots, Graphs, formulas, and other special functions will do to the processing.

SQL Commands:

Info-Alert passes SQL Commands that are created using the Build Alerts function directly to your data source. Please note that the command syntax may need to change based on the type of data you are reading from. For example,

- Excel tables should be enclosed in brackets, ie Select AccountId, Balance from [Sheet1\$] Where Balance > 20
- Dates in MS Access should be enclosed in pound signs, ie #12/15/02#
- Dates in MS SQL should be enclosed in single quotes, ie '12/15/02'
- Some ODBC drivers handle dates in a different way. Please check with the manufacturer's documentation.

There are many other differences between data sources, please refer to documentation provided by the data source manufacturer for additional information.

Stored Procedures:

When using the 'stored procedure template' for Info-alert you must use SQL authentication when attaching to the data source. NT or 'trusted' authentication is not supported at this time.