Administration
Creating Scheduled Alerts

IMPORTANT NOTES

In the case of the death of a person (child, student or adult), One automatically generates a system warning that displays on the person's record. For more information, refer to *RG_Administration_System_Alerts*.

A number of predefined alerts are included in the One installation. Predefined alerts are always active and cannot be edited or deleted. For more information, refer to *RG_Administration_System_Alerts*.

Scheduled Alerts

Alerts are created to advise or warn users of changes in field values within a record. Alerts are displayed as an email, a popup message or a workflow message on the system administrator's **My Home Page**, or as a portal message for portal users. Scheduled alerts set a date, time and frequency when an alert is to be executed.

Alerts can be stored against individual records. This functionality is available by clicking the **Alerts** button at the top of the page in many areas of One.

The scheduled alert functionality is linked to the configuration tool which determines the frequency of checking for background tasks, e.g. the job schedular. The **Frequency of Checking Background Tasks** field is set in the CCS Enterprise Server Configuration Utility; this should be set lower than the scheduled alert frequency. For more information, refer to the *v4 Scheduled Tasks* technical guide, available on the One Publications website (www.onepublications.com).

A saved alert will not work until it is activated. For more information, see the *Activating an Alert* section.

Creating a Scheduled Alert

To create a new scheduled alert:

1. Select **Tools | Administration | Alert Definition** to display the **Maintain Alert** page.

2. Click the **New** button to display the **Alert Definition [New Alert Definition]** page.
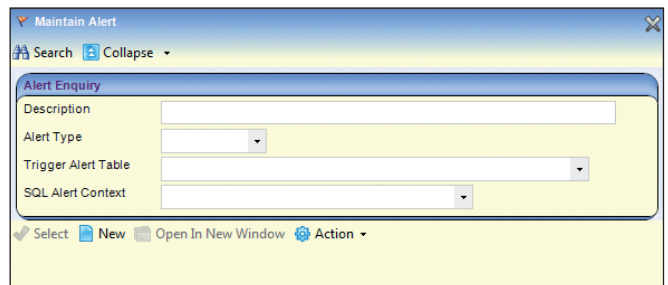
> **NOTE:** The **Alert Definition ID** is a system generated number and cannot be changed.

3. From the **Alert Type** drop-down, select **Scheduled**.

4. Enter a **Reason for Alert**.

5. Enter a **Description**.

   An alert cannot be made active until it has been saved.

   You cannot create a predefined alert; they are included in the One installation.
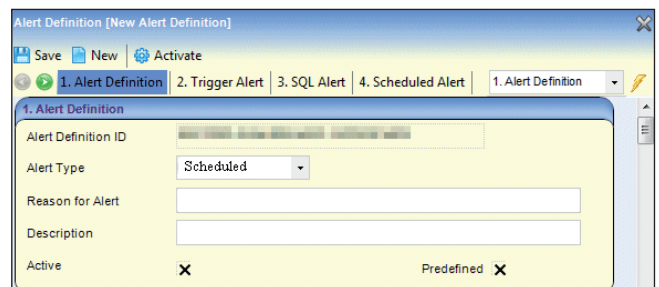
6. On the **Scheduled Alert** panel enter the SQL **Query**. You can only use *Select* statements.

   You cannot include parameters in the SQL **Query** field.

7. If required, select the **Include SQL Result** check box to enable repetition of the SQL message in the output.

8. If you want to fire a message regardless of the values returned, select the **Fire Alert if Row Returned** check box.

9. Enter the date and time for **Alert next scheduled**.

10. Enter a number to **Repeat every** Minute(s), Hour(s), Day(s), Week(s) or Month(s).

11. Click the **Save** button.
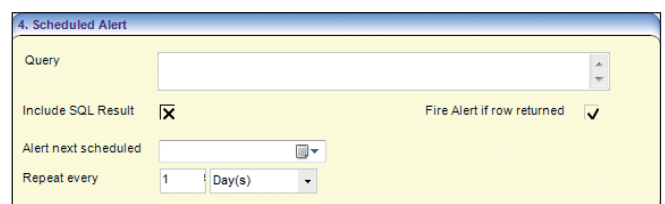
    The alert cannot be activated until a recipient has been added and an action has been defined.

Adding a Recipient

All alerts require at least one recipient. The recipients and the actions (the way the alert is delivered) are selected in the **Recipient List** panel. The recipient **Type** determines the actions available for selection.

NOTE: You cannot set up popup messages for scheduled alerts.

To add a recipient:

1. Click the required **Add** button to display the relevant browser or enquiry dialog.

   Clicking the **Add Email** button displays an **Add email address** dialog for you to manually enter email addresses.

2. If required, use the search fields to narrow your search criteria.

3. Highlight a record and click the **Select** button to return to the **Recipient List** panel.

4. On the **Recipient List** panel, select the check boxes to send the alert by **Email, Popup** or **Workflow** message.

Defining an Action

In the **Action** panel, define all actions selected in the **Recipient List** panel. All alerts require at least one action.

You can preview SQL alerts by selecting an action from the **Preview Action** drop down and clicking the **Preview Message** button.

Email

To define an **e-mail** action:

1. Enter a **Subject**.
2. Enter a **Message**.
3. Click the **Save** button.

Workflow Message

Before a workflow message alert can be received, a system administrator must enter the details in the **Workflow Server** tab of the Capita Children's Service Enterprise Server Configuration Utility. For more information, refer to the *Installing and Configuring One v4 Core Components* technical guide available on the One Publications website (www.onepublications.com).

To define a **Workflow Message** action:

1. Enter a **Workflow name**.
2. Enter a **Workflow message**.
3. Select a **Duration**.
4. Click the **Save** button.

Portal Message

To define a **Portal Message**:

1. Select a **Template** form the drop-down.
2. Click the **Save** button.

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Activating an Alert

A scheduled alert can be activated when it is created by entering all mandatory information, selecting the required recipients and defining at least one action. Saving the alert displays the following message: *Do you want to activate the alert?* Selecting **Yes** activates the alert immediately and the greyed out **Activate** button at the top of the page changes to **Deactivate**.

To activate an existing scheduled alert:

1. Select **Tools | Administration | Alert Definition**, then select a deactivated (Active=False) scheduled alert from the **Search** list to display the **Alert Definition** page.

2. Click the **Activate** button; the button status changes to **Deactivate**. The following message displays at the bottom of the page: *Alert activated successfully*.

   You do not need to save the alert again.
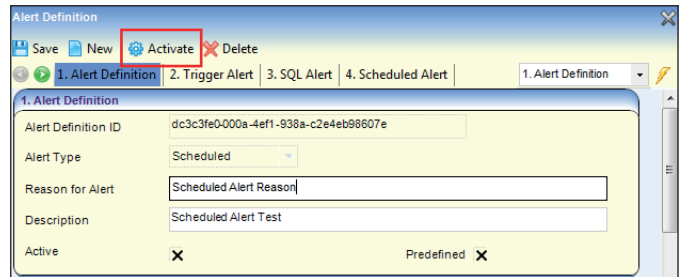
Deactivating an Alert

Predefined alerts <u>cannot</u> be deactivated. An existing scheduled alert can be deactivated using the **Deactivate** button at the top of the page. A scheduled alert <u>cannot</u> be changed or deleted until it has been deactivated.

To deactivate a scheduled alert:

1. Select **Tools | Administration | Alert Definition**, then select a scheduled alert from the browse list to display the **Alert Definition** page.

2. Click the **Deactivate** button; the button status changes to **Activate**. The following message displays at the bottom of the page: *Alert deactivated successfully*.
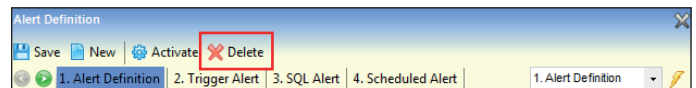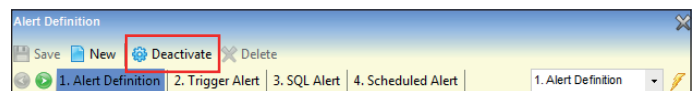
3. Click the **Save** button.
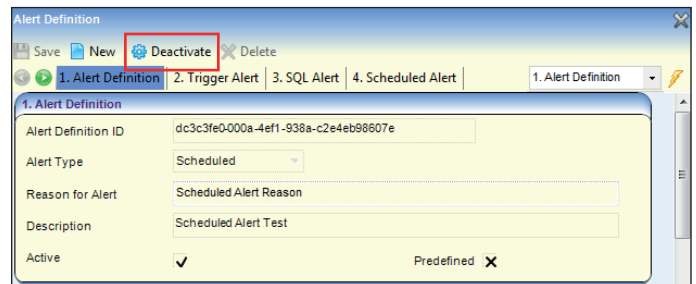
Deleting an Alert

Predefined alerts <u>cannot</u> be deleted. A scheduled alert <u>cannot</u> be deleted until it has been deactivated.

To delete a scheduled alert:

1. Select **Tools | Administration | Alert Definition**, then select a scheduled alert from the browse list to display the **Alert Definition** page.

2. If required, click the **Deactivate** button; the button status changes to **Activate**. The following message is displayed at the bottom of the page: *Alert deactivated successfully*.

3. Click the **Delete** button; the following message displays: *Are you sure you want to delete this <Alert> for the <Table>?*

4. Click the **Yes** button; the following message is displayed at the bottom of the page: *Alert <Name> for Table <Name> is deleted successfully*.

Related Reference Guides:
- RG_Administration_Creating SQL Alerts
- RG_Administration_Creating Trigger Alerts
- RG_Administration_System Alerts