

SYSTEMGROUP



# Enhanced Alerts System

Version 1

12/15/2006  
TSI SYSTEMGROUP INC  
TriForce Team

Email: [triforce@systemgroup.com](mailto:triforce@systemgroup.com)

[www.systemgroup.com](http://www.systemgroup.com)

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## INTRODUCTION

The Enhanced Alerts System (EAS) has been developed in order to facilitate communication between departments within your organization. The subsystem provides an easy-to-use interface with which any user can quickly apply a colour-coded alert to any field within TriForce. The system also integrates these alerts into the existing Reminders System so that you can remind users of important alerts. It is important to note that the EAS system is also a self-maintaining system; alerts with a specified expiry date will automatically be removed from the system on the defined date.

For enhanced usability and flexibility, two alert types exist;

- General Alerts;
- Categorized Alerts, which inherit Administrator-defined category properties.

### Key Features

- Fields are colour-coded for easy identification
- Tooltips are used as an informative tool displaying the alert message
- Pop-up Alerts: visible for high level, important alerts
- Alert Categories: Administrator-defined and colour-coded for quick application
- Listing of all Active/Inactive alerts via menu path Tools/ Alerts
- Alerts Details Screen for quickly managing all company alerts across an enterprise
- Self-Maintaining System: Alerts with limited duration automatically clear on their expiry date
- Displays the total number of Alerts per form (in form's upper right hand corner)
- Integrated Reminder System: generates a reminder of the applied Alert
- Extensibility: upon request, EAS may be included in forms that currently do not support EAS

## OVERVIEW

An alert can be quickly applied to any field by selecting an alert type from the right click Alerts sub menu. Fields containing an alert are highlighted with a specific color, thereby visually catching a user's attention. Alert messages are easily viewed in a tooltip when the mouse pointer is placed over the corresponding field. Depending on alert settings, the alert message may be a Pop-up and/or be made Read Only. Alerts can be created, modified and cleared by any TriForce XP user.

A form holding a record containing more than one alert displays the number of active alerts in its upper right hand corner. Hovering over this area invokes a tooltip, displaying each record's alerts with their tab and field location.

The Reminder, Enhanced Alerts system, and user groups work in collaboration to notify selected users of an existing alert.

The Enhanced Alert System introduces three new maintenance interfaces.

These include:

- **Alert Categories Form**

The Alert Categories form distributes nine (9) alert categories per company *or* system. These pre-defined categories are intended for users to quickly associate alerts to fields with little or no modification.

- **Groups**

The Groups interface handles the definition of user groups which can be assigned to TriForce XP users. User groups are currently intended for use by the Enhanced Alerts System.

- **Alert Maintenance Form**

The Alert Maintenance form lists all system-wide alerts along with their location and expiry date. The Alerts Details Screen provides useful and time-efficient tools for quick alert navigation, modification and deactivation.

Some important clarifications follow:

- The term “Alert” encompasses General and Categorized Alerts.
- Terms **Create**, **Associate**, and **Apply** are used interchangeably.
- Terms **Expire**, **Clear**, and **Inactive** are used interchangeably.
- Active alerts are alerts that have not expired.
- Inherited alerts are alerts that appear in fields, created elsewhere in the company’s system.
- Empty forms do not contain any data. These forms appear before selecting a record.

## HOW TO GUIDE

Setting up the EAS is fairly simple. Please ensure you follow these steps, in order:

1. Configure [Setup 0554](#) for Alert Categories;
2. Add and Define [User Groups](#);
3. Define [Alert Categories](#);
4. [Create](#)/ [Modify](#)/ [Clear](#) field Alerts;
5. [Manage](#) Alerts.

## EAS SYSTEM ADMINISTRATION

As mentioned in the introduction, the Enhanced Alert System introduces three new maintenance interfaces.

These include:

- **Groups**
- **Alert Categories Form**
- **Alert Maintenance Form**

After installing the Enhanced Alert System, the **Alert Categories** and **Alerts** menu points will only be available to user profiles having access to the Tools and/or Global System sub menu options. The TriForce Administrator is responsible for setting the appropriate status to the Alert Categories and Alerts menu points in user profiles. The Groups maintenance interface is available to users who have access to the **Security** menu.



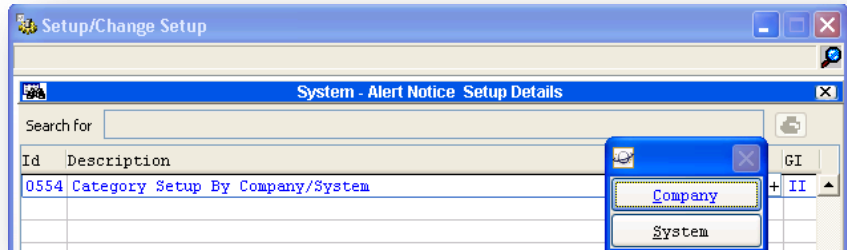
For more information about the TriForce XP User Profiles and the Security System, please refer to the [TriForce Security System Manual](#).

### Alert Categories

TriForce XP distributes nine (9) alert categories. Alert categories are intended for users to quickly associate alerts from the right click menu to fields with little or no modification. The alert categories are setup, activated, and managed from the Alert Categories form. Each alert category is editable and can be activated / deactivated at any time.

Before defining the categories, the TriForce Administrator must decide on whether to configure the alert categories per company or per enterprise.

Menu Location: **Setup/ Change Setup/ page: System – Alert Notice**



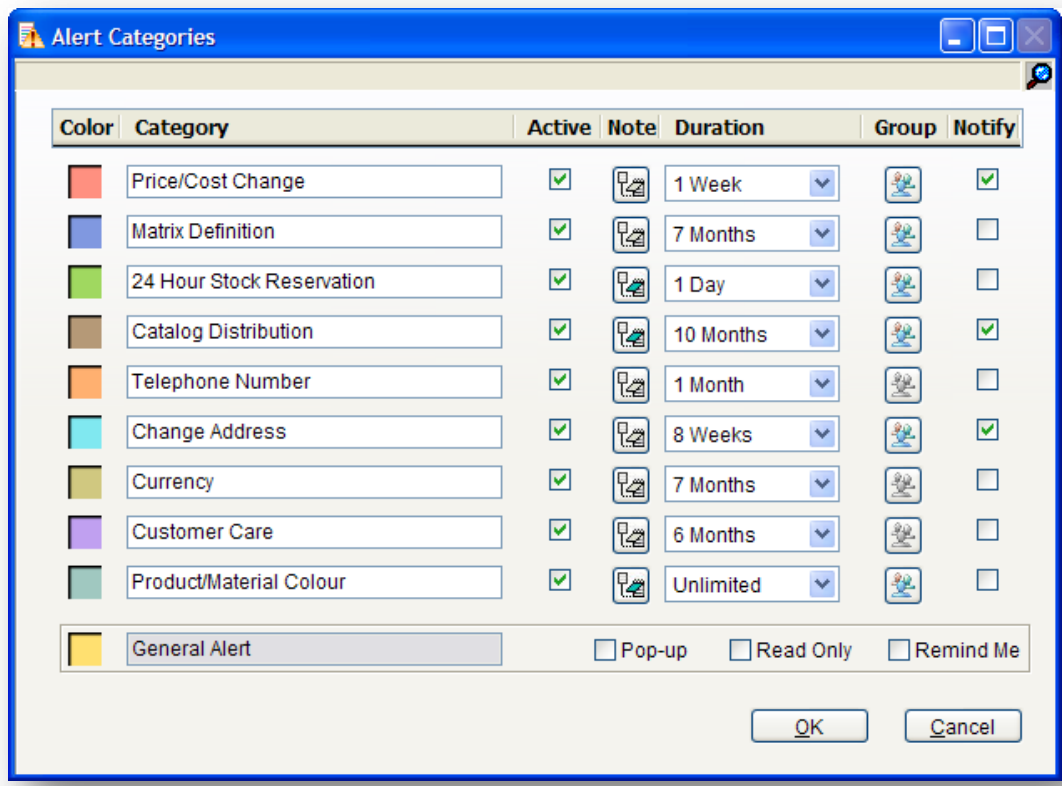
**Figure 2.1 – Alert Categories Setup**

**SETUP ID 0554** allows the Alert Categories to be configured per company (C) or per system/enterprise (S).

The TriForce Administrator may now begin defining the Alert Categories.

**ALERT CATEGORIES FORM**

Menu Location: **Setup/ System Global/ Alert Categories.**








**Figure 2.2 – Alert Categories form**




The TriForce Administrator can easily define each alert category by following the steps described in Table 2.1

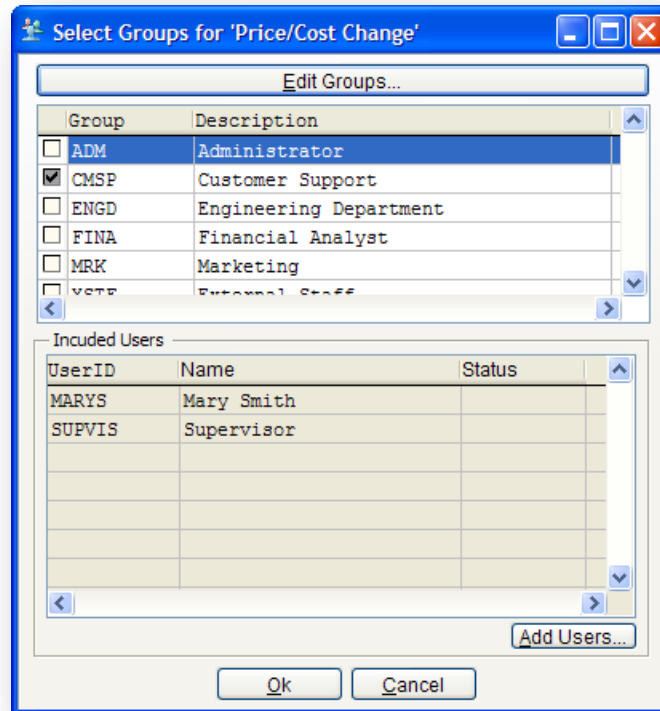
**Table 2.1 – Alert Category Setup**

Column	Category Setup
<b>Color</b>	1. Select one of the nine available colors.
<b>Category</b>	2. Enter a Category Name
<b>Active</b>	3. <input checked="" type="checkbox"/> activates the alert category for selection from the right-click menu  <input type="checkbox"/> deactivates the alert category: removes option from right-click menu
<b>Note (Optional)</b>	<p>4. By clicking the <b>Note</b> button , a screen similar to that in Figure 2.3 appears. Set the alert options* (Pop-up &amp; Read Only) and type an alert message in the Note box. Return to the <b>Alert Categories</b> form by clicking the <b>Page</b> button .</p> <div data-bbox="483 1136 1308 1566" data-label="Image"> </div> <p><b>Figure 2.3 – Alert Screen for an Alert Category</b></p> <p><b>Note:</b> The <b>Note</b> button's color changes to  for categories containing messages.</p>


<b>Duration</b>	5. Click the drop down box arrow  and select the desired duration for the Alert once applied.
<b>Group (Optional)</b>	6. Clicking the Groups button  , the Select Groups for 'Category' Selection form appears, as in Figure 2.4. Select users / groups* for alert notification via the Reminder system. Clicking the Edit Groups button opens the Groups Maintenance screen. See section <a href="#">Groups</a> for more information.  <b>Note:</b> Selecting user groups automatically enables the Remind Others option in the Alert Screen.
<b>Notify (Optional)</b>	7. <input checked="" type="checkbox"/> sends a desktop alert to the <b>selected</b> groups/users in step 6.  <input type="checkbox"/> Deactivates the option.  <b>Note:</b> The Notify option cannot be enabled without the selection of user groups in step 6 nor can it be disabled by the user once set by the Administrator

Settings are saved by clicking the **OK** button when exiting the Alert Categories form.


	<p>* When a user applies a <i>categorized</i> alert, they can change the default options as well as select different users and user groups for alert notification, regardless of the setup in the Alert Categories form.</p>
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**Figure 2.4 – Select Groups for ‘Category’ form**

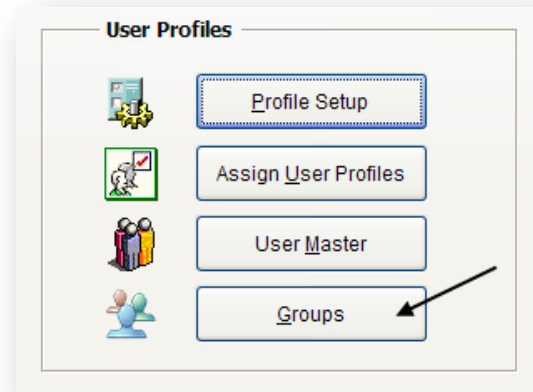
	<p>Alert categories can be modified at any given time. Once an active category is modified, the modification only applies to new alerts; all previously associated alerts retain their original settings and notes.</p>
---	---

The last alert type to appear in the form of Figure 2.2 is the **General Alert** type. Pop-up, Read Only, Remind Others and Remind Me options are established directly on the form. The Remind Me option cannot be disabled from the Alert Screen if the TriForce Administrator enabled the option from the Alert Categories form.

	<p><b>Note:</b> Please see the <a href="#">Creating Alerts</a> section for more information on the Read Only, Pop-up and Remind Me options.</p>
---	---

## Groups

Menu Location: **Setup/ Security/ option - Groups**



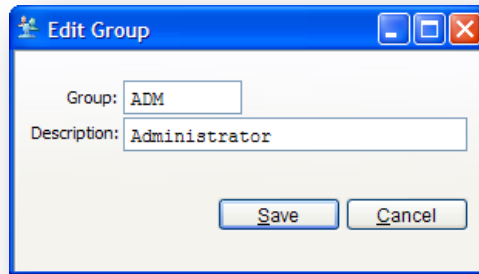
**Figure 2.5 – Groups option from Security Setup screen**

The Groups Maintenance interface is used to manage group / user associations, see Figure 2.6. The Groups Maintenance screen is used to add, edit and delete user groups. User groups, defined by the TriForce Administrator, are simply a collection of users with common functions – job roles, intended for by the Enhanced Alerts System. Essentially, user groups are created to select specific users for alert notification via the Reminder System. Groups can also be edited from the Select Groups for 'Category' and Groups for Selection forms, available from the Alert Categories form (see Figures 2.4 and 3.7 respectively).



To **edit** a User Group from the List:

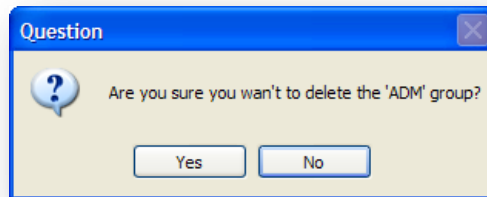
- Select the group to edit from the list
- Click the **Edit** button; the Edit Group form appears, as in Figure 2.8
- Edit the Group ID and/or description
- Click the **Save** button; changes are immediately applied.



**Figure 2.8 – Edit Group form**

To **delete** a User Group from the List:

- Select the group to delete from the list
- Click the **Delete** button; a dialog box appears, as in Figure 2.9
- Confirm deletion by clicking **YES**; the group is immediately removed from the list.

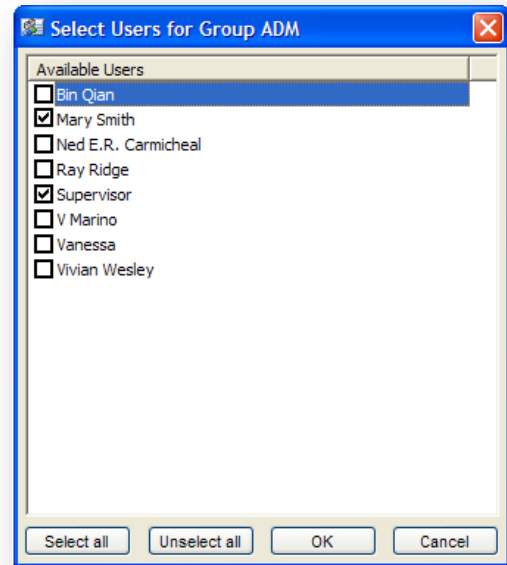


**Figure 2.9 – Dialog Box**

Define / Update a User Group from the List:

- Select the group to define/update from the list
- Click the **Users** button; the Select Users for Group form appears containing the list of all TriForce XP users, as in Figure 2.10
- Select the users you wish to add to add/remove from the user group
- Click the **OK** button.

**NOTE:** Users selected from the form in Figure 2.10 are the users defined in the user group and displayed once the group is selected from the Select Group for 'Category' and the Groups for Selection forms in Figures 2.4 and 3.7.



**Figure 2.10 – Select Users form**

## **USER MASTER**

A new Tab, Member Of, has been added to the User Master, see Figure 2.11. When selected, a list of associated user groups is displayed. Alternatively, clicking the **Add** button opens the Select Groups for User form, as in Figure 2.12, listing all user groups defined in the Groups Maintenance screen. The user may be added to or removed from any of the user groups. The user can quickly be removed from a user group by selected the group from the list and clicking the **Remove** button.

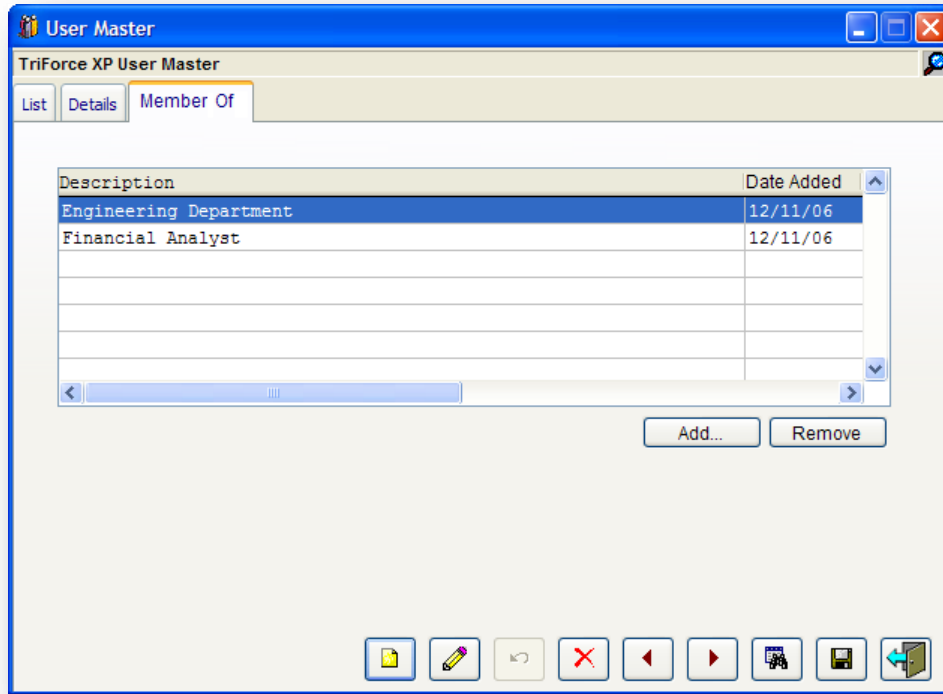


Figure 2.11– User Master Tab ‘Member Of’

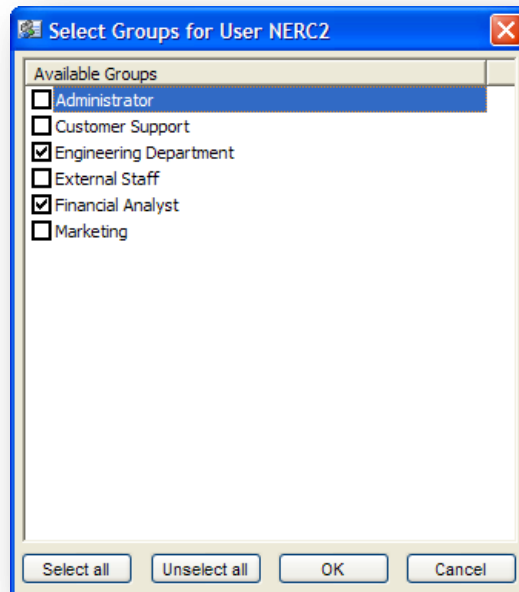



Figure 2.12 – Select Groups for User form



## Reminder System

The Reminder system works in collaboration with the Enhanced Alert System to deliver alert notifications to selected users from the Groups for Selection form. Once an alert is saved with the **Remind Others** option enabled, the alert is automatically added to the list of Reminders. The Reminders icon  on the options toolbar blinks as it notifies users associated to the alert. Clicking the Reminder icon opens the reminder screen as in Figure 2.13 below. Alerts are listed until dismissed, deactivated, or if users are removed from the Groups for Selection form, shown in Figure 3.7, or until the Remind Others option is disabled within the Alert Screen.

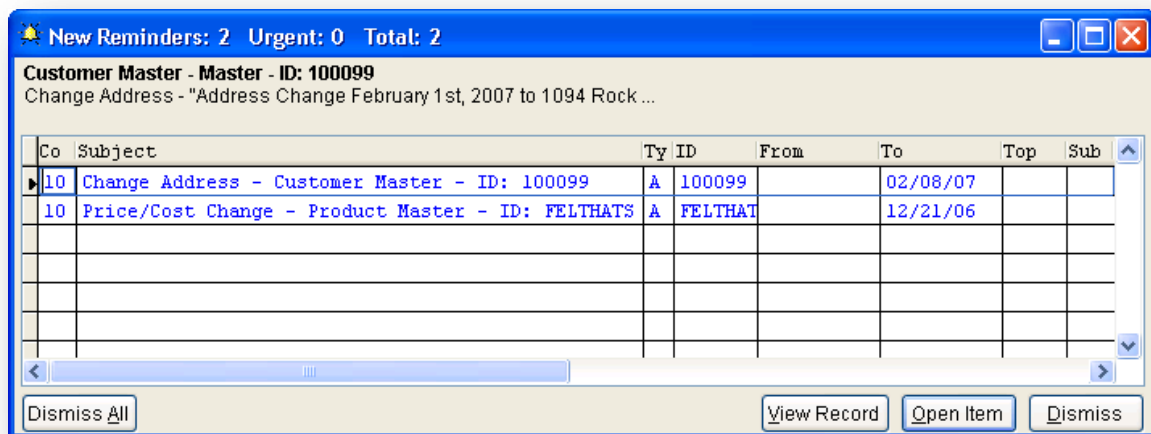


Figure 2.13 – Reminder screen

The **View Record** button is used to *open the record containing the alert*, this provides the user with a quick way to access records with important alerts. **Open Item** button opens the Alert Screen thereby allowing the user to view the alert message in detail.

## Alerts Maintenance

All company alerts, along with their location and expiry date, are grouped and listed in the Alert Notices screens. Upon selection of an alert, the Alerts Details Screen appears and displays the alert's related information. The Alerts Details screen provides navigation buttons in order to easily navigate though each alert. The screen also includes buttons offering editing and deactivation capabilities for active alerts.

Menu Location: **Tools/ Alerts**

All active alerts, excluding inherited alerts, are listed in the **Active Alert Notices** Grid View, as in Figure 2.14. Both active and inactive alerts appear in the **All Alert Notices** Grid View as in Figure 2.15.

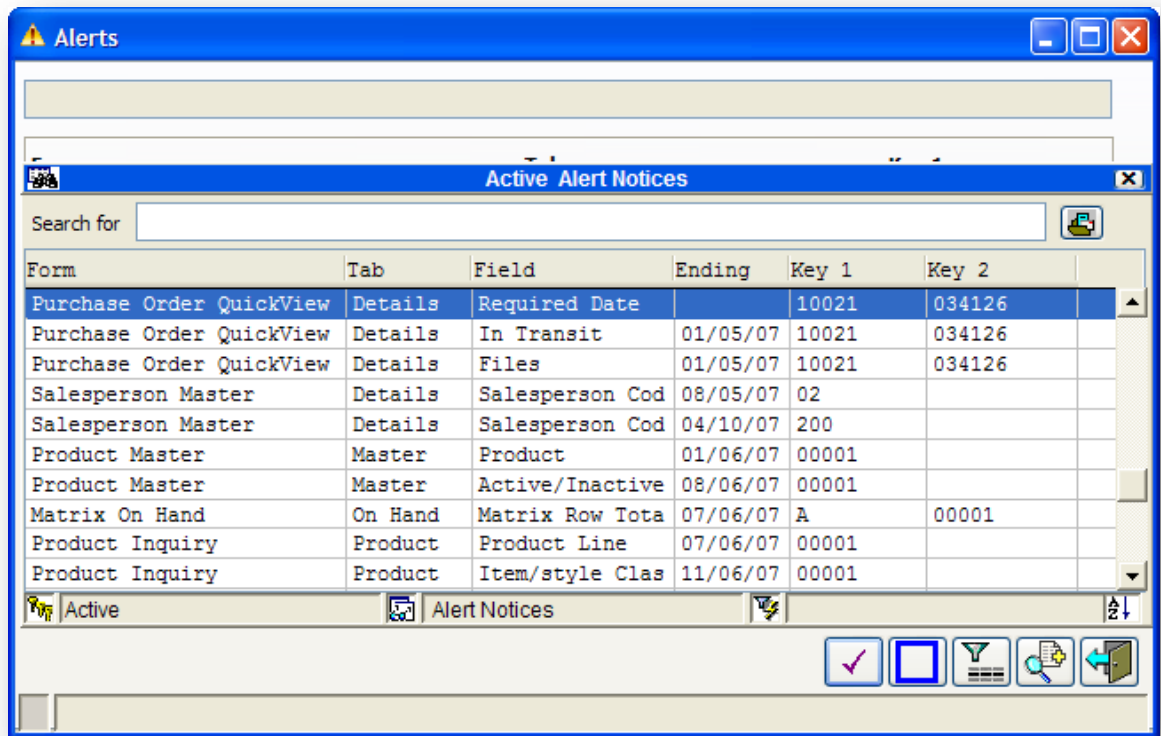


Figure 2.14 – Active Alert Notices Grid View

The **Show Inactive**  / **Hide Inactive**  button is used to alternate between Grid Views.

The **Range Filter**  and the **Go to Record**  buttons are described in Table 2.3.

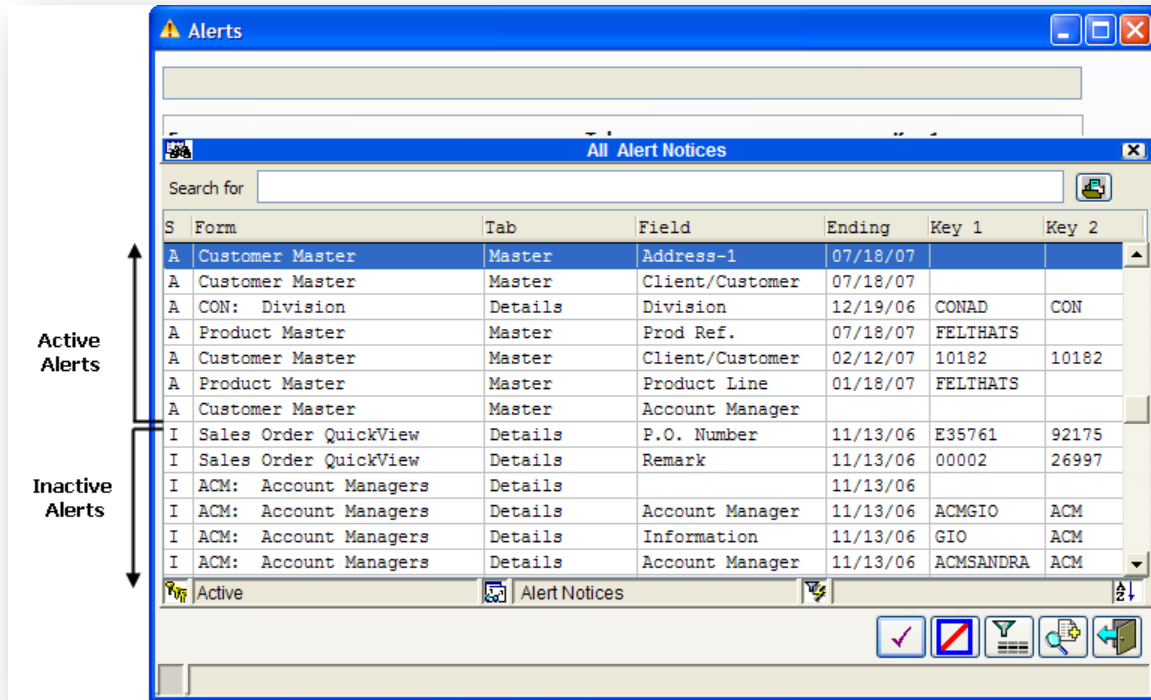


Figure 2.15 – All Alert Notices Grid View

Table 2.2 partitions alert information from the Grid Views into 7 columns.

Table 2.2– Column Description for Alert Notices Grid Views

Column Name	Description
S*	I for Inactive alerts / A for Active alerts
Form	Relevant application screen
Tab	Page Location on above screen
Field	Field specification

Ending	Alert Expiry Date Note: Empty fields imply unlimited duration.
Key 1	Used to identify specific record key
Key 2	Used to identify specific record sub-key

\*Column S is only available on the **All Alert Notices** Grid View.

### ALERT DETAILS SCREEN

Upon selection of an alert from the Grid View listing, the Alert Details Screen, as in Figure 2.16, appears and displays the alert's details. This screen provides useful and time-efficient tools for quick alert navigation, modification, and deactivation.

The description for each button in the Alerts Details Screen is presented in Table 2.3.

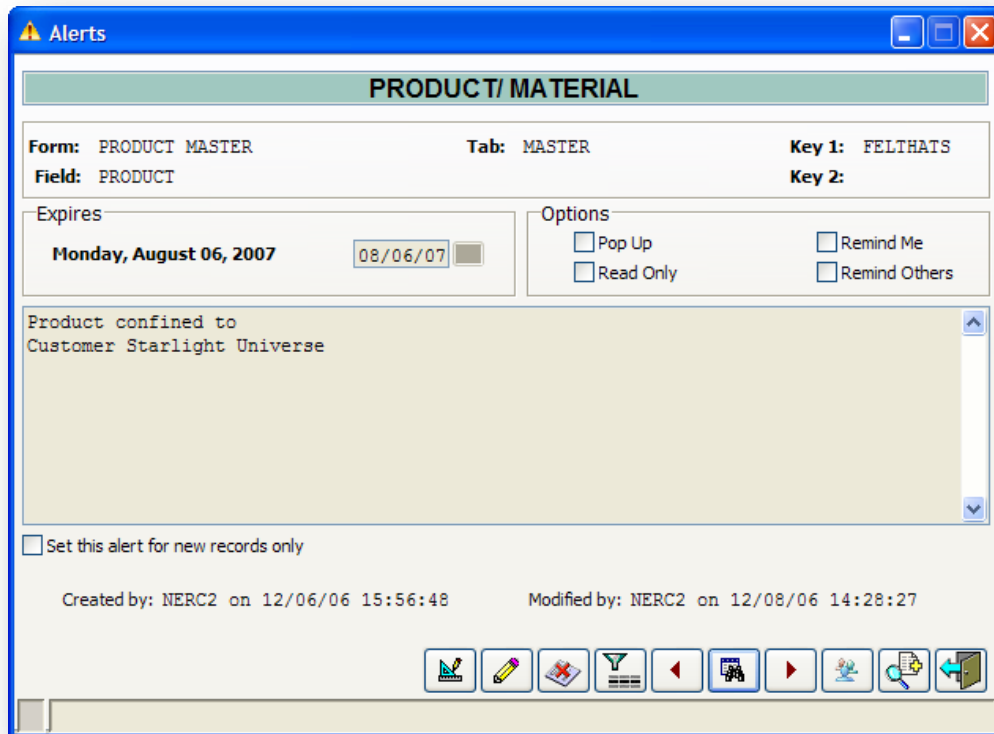


Figure 2.16 – Alerts Details Screen

**Table 2.3 Screen button descriptions of Figure 4.5**

Button Name	Description	Alert Status	Icon
Screen Setup	Used for flexible screens.	Active/Inactive	
Edit	Allows the user to edit the alert message and options.	Active	
Deactivate Alert Notice	Deactivates active alerts; alert becomes Inactive.	Active	
Range Filter	Directs user to Range Filter Screen.	Active /Inactive	
Previous	Display the previous record in the Grid View listing.	Active /Inactive	
List	Re-directs the user to the Grid View.	Active/Inactive	
Next	Displays the next record in the Grid View listing.	Active/Inactive	
Groups For Selection	Opens Groups For Selection form as in Figure 3.7, displaying all groups / users associated to the presented alert.	Active/ Inactive	
Go To Record	Opens the form containing the alert.	Active/ Inactive	
Quit	Closes the form.	Active/Inactive	

## ALERT DEACTIVATION

The **Range Filter** quickly groups alerts for deactivation. By clicking the Range Filter button, the Range Filter Screen is displayed as illustrated in Figure 2.17. Leave all fields blank in order to select all active alerts; narrow your selection by entering data into the fields, then Confirm. The **Deactivate Selected Alert Notices** Grid View appears, as in Figure 2.18, displaying all filtered alerts. To exclude alerts from the list, use the **Exclude** and **Exc.all** buttons (this concurrently removes the '\*' from the I/E column). Click the **Proceed** button to confirm your selection and deactivate the alerts.

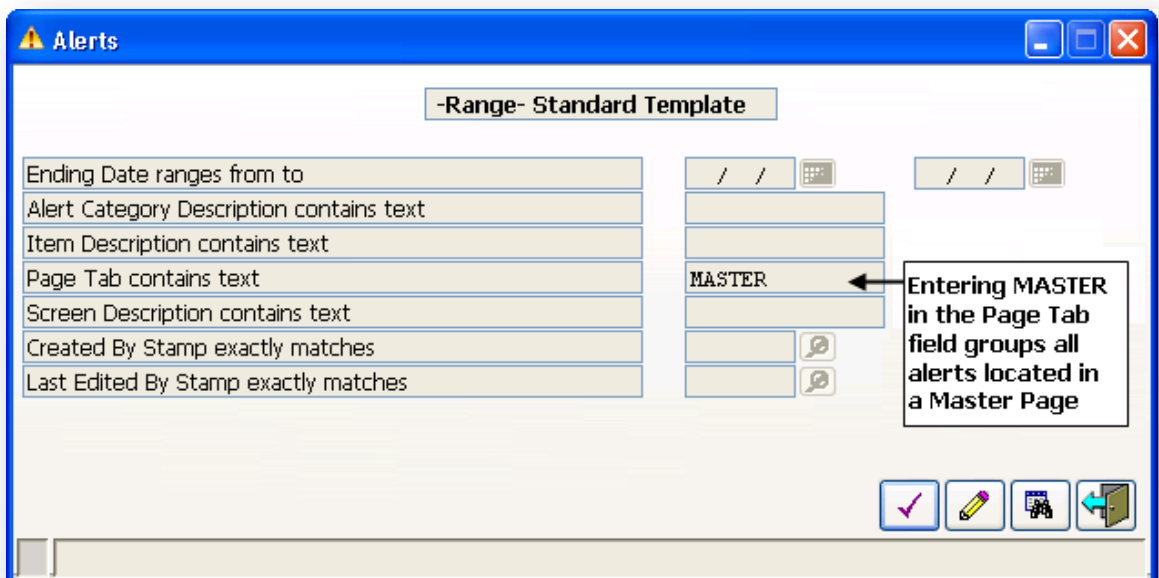
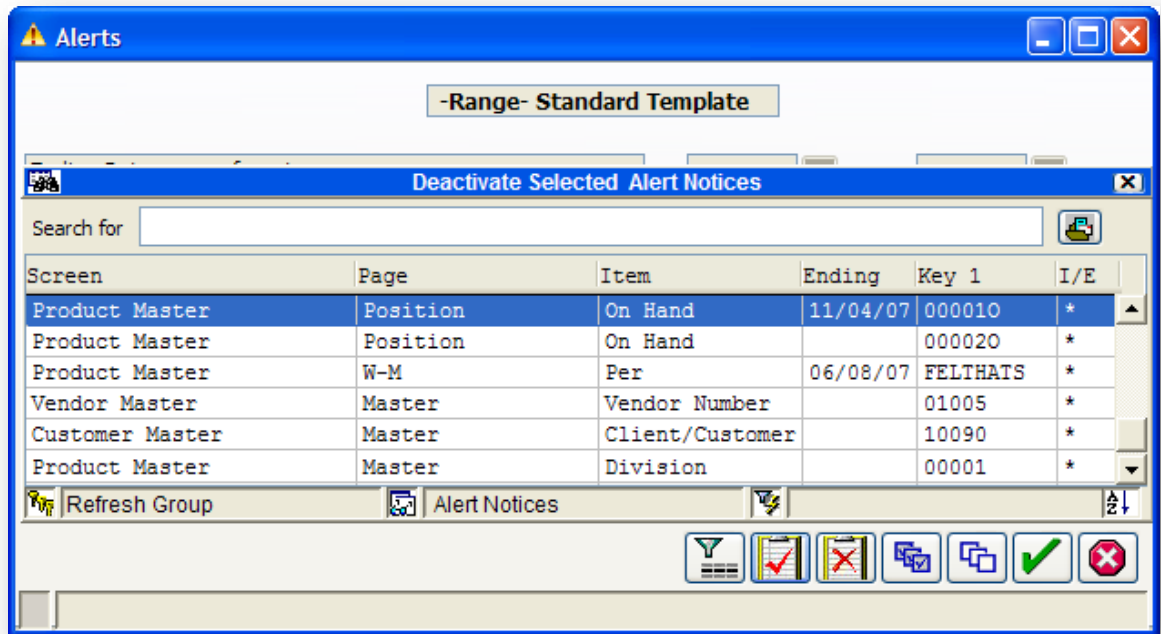


Figure 2.17 – Range Filter



**Figure 2.18 – Deactivate Selected Alert Notices Grid View**

The inactive alerts will appear in the **All Alert Notices** Grid View.

### Creating Alerts

Users can associate an alert to any field and matrix row on forms supporting EAS. To create a field alert:

1. Place the mouse pointer over the field that is to contain the alert
2. **Right click** the mouse on that field
3. Place the mouse pointer over the **Alerts** menu point from the pop-up menu
4. The **Alerts** sub menu appears
5. From the **Alerts** sub menu, select one of the alert types
6. The **Alert** Screen is now displayed
7. Setup the alert (see Table 3.1)
8. Click the **Save** button.

The Alerts sub menu, as shown in Figures 3.1 and 3.2, offers two types of alerts for selection:

- **General** alert type: Always available for selection;
- **Categorized** alert type: Administrator defined, available upon activation.

Figure 3.1 demonstrates the Alerts sub menu containing all active Alert Categories whereas Figure 3.2 demonstrates the Alerts sub menu containing only four active Alert Categories of the available nine.



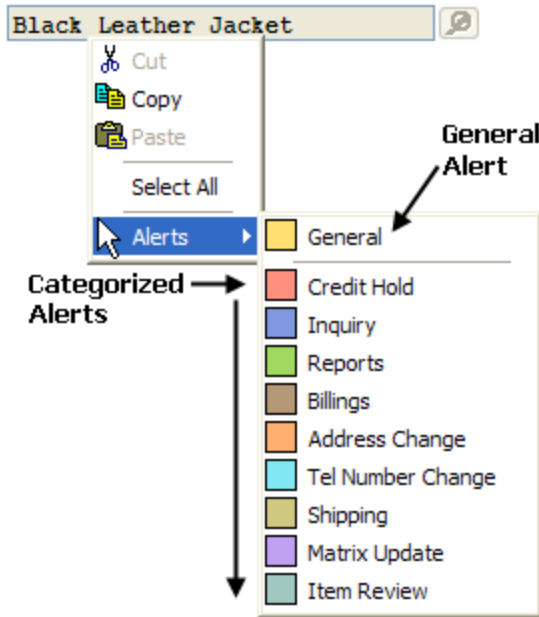


Figure 3.1 – Full Alerts Sub Menu

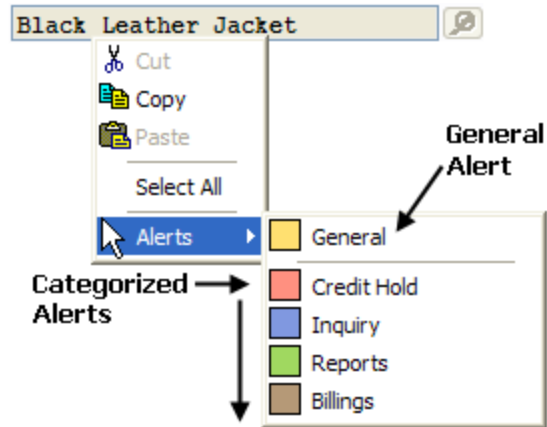



Figure 3.2 – Partial Alerts Sub Menu

	<p>* Alerts may be applied to enabled or disabled, empty, or populated fields.</p>
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Selecting **General Alert** from the Alerts sub menu opens the Alert Screen as in Figure 3.3;

Selecting a **Categorized** alert opens the Alert Screen as in Figure 3.4.

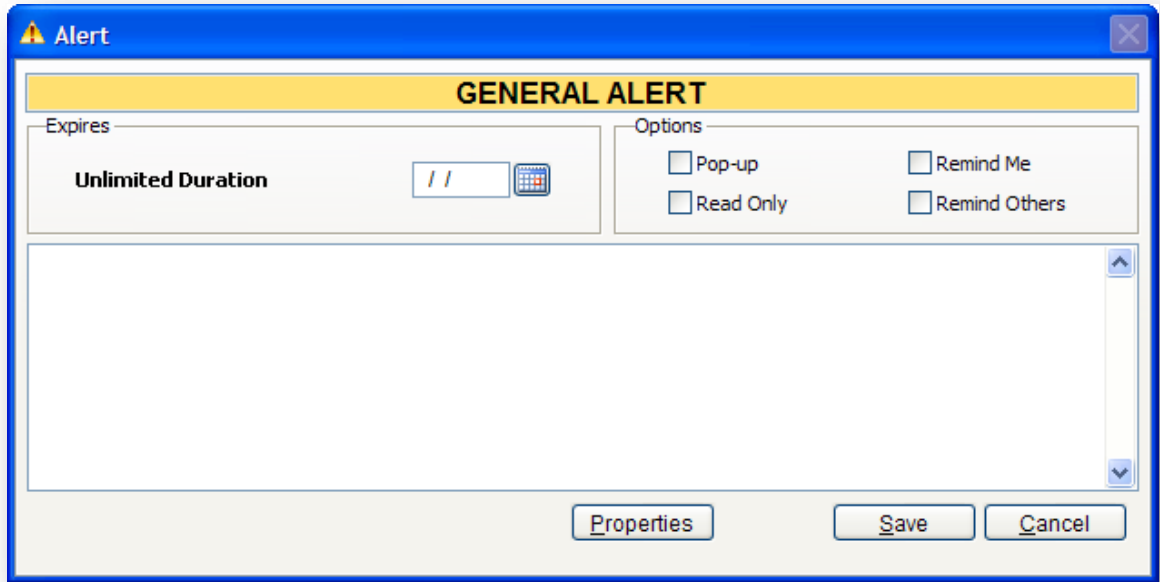


Figure 3.3 – General Alert Screen

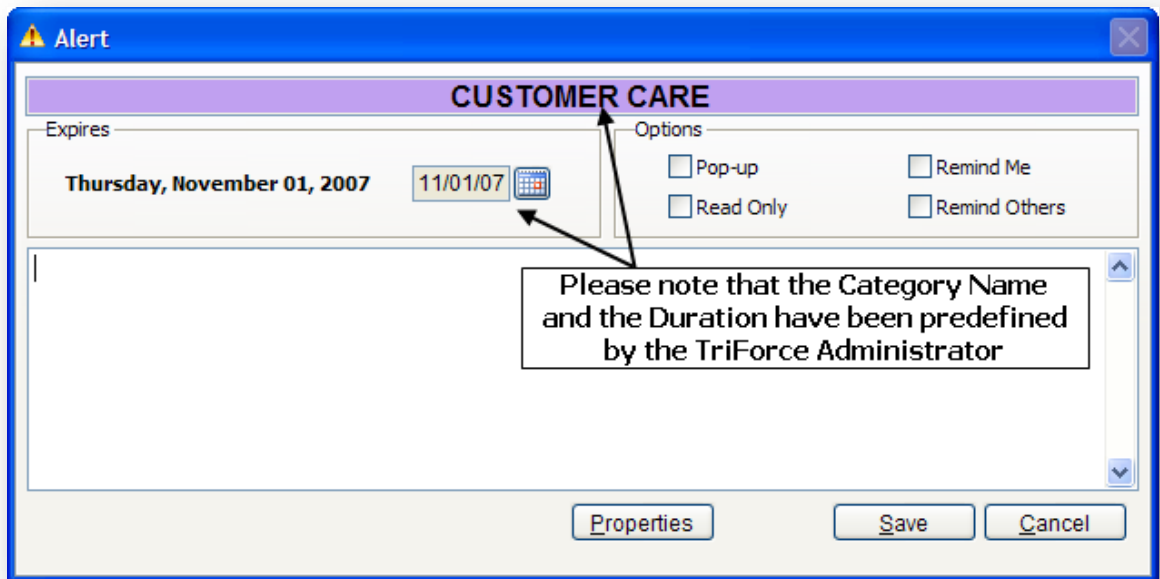
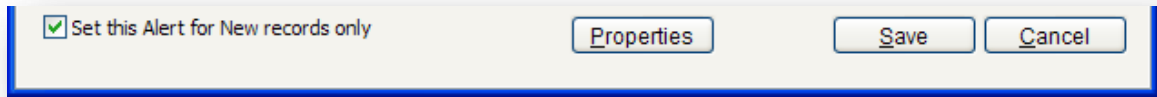


Figure 3.4 – Categorized Alert Screen

If you are associating an alert to a field in an empty form, an additional option Set this alert for New Records Only will appear in the lower left hand side of the Alert screen, see Figure 3.5.



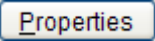
**Figure 3.5 –Alert Screen with Additional Option**


Table 3.1 lists and describes the available settings in Figures 2.3, 2.4, and 2.5.

**Table 3.1 – Alert Screen Setting Descriptions**


Setting	Description
Category Color	Highlight colour used for that specific alert.
Category Name	Category Name; non-editable from this interface.
Expires	<ul style="list-style-type: none"> <li>For General Alerts, use the date picker to choose an expiry date.  Alerts saved without an expiry date ( <input type="text"/> ) have unlimited duration. An expiry date may be chosen at a later time.</li> <li>For Categorized Alerts, the expiry date is automatically calculated (using the alert category duration definition) and is displayed to the user. Although the expiration date cannot be modified from the Alert Screen, it can be modified from the Alerts Details Screen by the TriForce Administrator. Keep in mind that it is possible for the duration of a categorized alert to be unlimited.</li> </ul> <p><b>NOTE:</b> Alerts expire at midnight on the date of their expiry.</p>
Pop-up*	<input checked="" type="checkbox"/> The alert message pops-up on screen. This occurs when a form/record containing pop-up alerts is accessed by a user.  <input type="checkbox"/> Pop-up functionality is disabled.

Read Only	<p><input checked="" type="checkbox"/> The alert message and options cannot be modified except by the user who enabled the option. If the option is disabled by the authorized user, the alert will be available for editing by any user.</p> <p><input type="checkbox"/> Read Only functionality is disabled, alert is editable by all users.</p>
Remind Me	<p><input checked="" type="checkbox"/> The Reminder screen lists the alert for notification until dismissed or deactivated.</p> <p><input type="checkbox"/> Remind Me functionality is disabled. Previously applied alerts with the Remind Me option enabled will have their associated reminders removed when this checkbox is disabled.</p>
Remind Others	<p><input checked="" type="checkbox"/> The Groups for Selection form appears as in Figure 3.7.</p> <p>When creating a General Alert, no user/user groups are selected from the Groups for Selection form; you may add your own.</p> <p>When creating a Categorized Alert, individual users and user groups may have been established, by default, by the TriForce Administrator. You may add/remove users and user groups from the form.</p> <p>Once the alert is applied, the Reminders screen will list, for <b>selected</b> users, the alert for notification until dismissed or the alert is deactivated.</p> <p>During the alert's activation, users/user groups may be added or removed from the Groups for Selection form. Added users are notified of the alert's existence via the Reminder system. By removing users, the alert notification in the Reminder list will automatically be removed.</p> <p><input type="checkbox"/> Remind Others functionality is disabled. Alerts appearing in the Reminder screen before disabling the option are removed from the Reminder list.</p> <p><b>NOTE:</b> The option may be enabled any time after the alert's creation where users/user groups may be added to or removed from the Groups for Selection form for alert notification.</p>

<p>Note Box</p>	<p>The Note box is used to insert alert messages. If a message has already been placed in the Note box, by the Administrator or by another user, it may be modified or extended. Right clicking in the Note box pops-up a menu with text editing features such as cut, copy, paste, select all, zoom, and spell checker.</p> <p><b>NOTE:</b> Tooltips and enabled pop-ups display the Category Name if the Note box is left empty.</p>
<p>Set for New Records Only</p> <p>(Option available from Empty Forms Only)</p>	<p><input checked="" type="checkbox"/> The alert is applied to the field of the empty form. The alert also appears in the same field when a new record is being created.</p> <p><input type="checkbox"/> The alert is applied to the field for all records including the empty form.</p> <p><b>NOTE:</b> Records containing alerts that have been created <b>from</b> an empty base record are called Inherited Alerts.</p>
<p></p>	<p>The Properties Sheet displays the name of the creator/modifier and time of the alert's creation/modification.</p>



**\*SELECTING  FOR POP-UPS**



Pop-ups appear when accessing records containing pop-up alerts. Clicking the pop-up's **OK** button only acknowledges the pop-up. Choose the option carefully as it may become a nuisance to users. An example of a pop-up is shown in Figure 3.6. Pop-ups can be removed by disabling the Pop-Up option from the Alert Details screen.

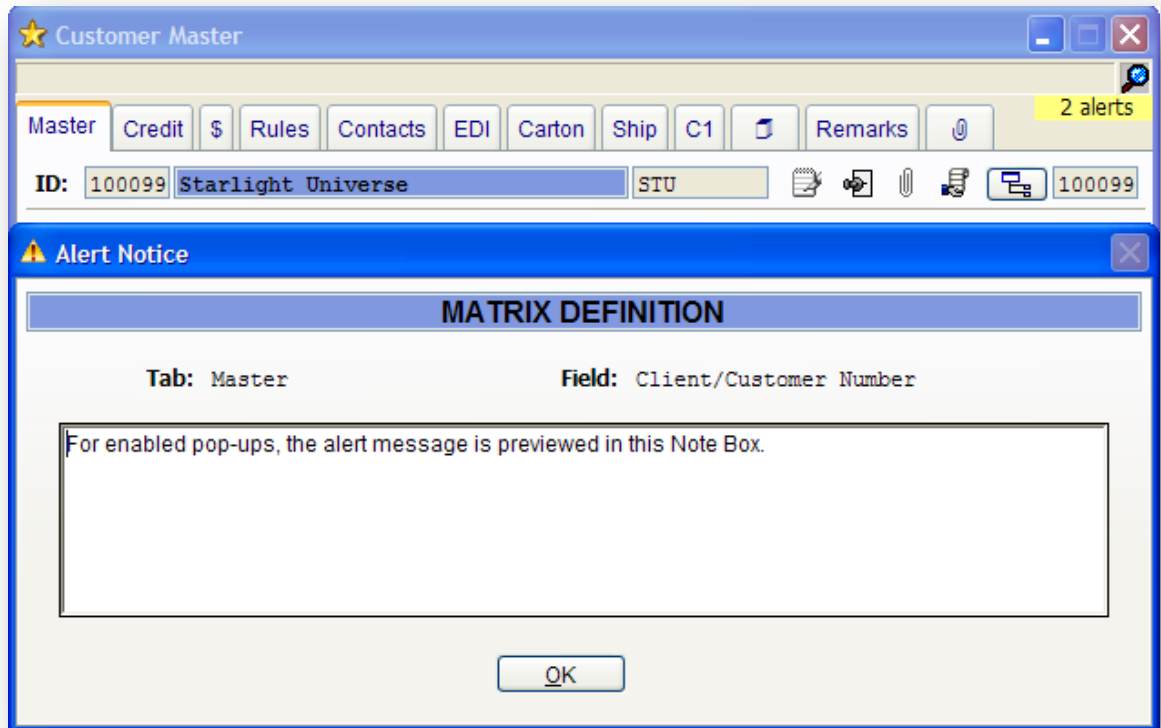


Figure 3.6 – Example of a Pop-up on the Customer Master Screen

## GROUPS FOR SELECTION FORM

The Groups for Selection form is used to add a group of users and/or individual users to an alert in order to create an associated reminder for that alert. Alerts created by using the Administrator defined Categorized Alerts may already contain a list of groups/users for notification. The user is always presented with the option to modify the list of included groups/users by selecting the Remind Others option from the Alert Detail screen.

Group	Description
<input type="checkbox"/> ADM	Administrator
<input type="checkbox"/> CMSP	Customer Support
<input checked="" type="checkbox"/> ENGD	Engineering Department
<input type="checkbox"/> FINA	Financial Analyst
<input checked="" type="checkbox"/> MRK	Marketing
<input type="checkbox"/> VETP	External Staff

UserID	Name	Status
BQIAN	Bin Qian	
SUPVIS	Supervisor	
VANESSA	Vanessa	

Figure 3.7 – Groups for Selection Form



**Note:** The *Included Users* listing displays a list of users who will be notified of the Alert via the Reminder system. If a user is present in more than one group, the list will only display unique instances of the UserID and the user will only receive the Reminder once.

After completing the six (6) steps for creating an alert, the alert's colour will fill the corresponding field and the alert message will be displayed in the field's tooltip. An example is shown in Figure 3.8.



**Figure 3.8 – Example of an associated Alert**

Once a field contains an alert (excluding inherited alerts), the options available in the field's **Alerts** sub menu change (see sub sections on Modifying and Clearing Alerts).



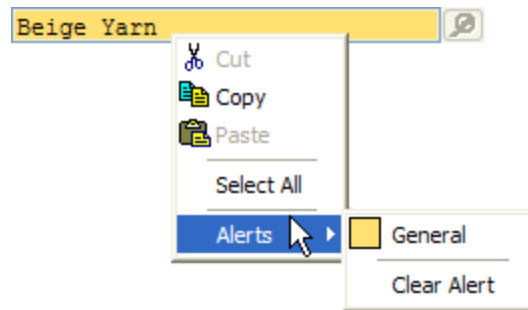
**Note:** You cannot **apply** more than one alert to a field. To apply another alert type, the current type must be cleared. See sub section Clearing Alerts.



## Modifying Alerts

To modify an active alert:

1. Place the mouse pointer over the field containing the alert to be modified;
2. **Right click** the mouse on that field;
3. Place the mouse pointer over the **Alerts** menu point from the pop-up menu;  
The **Alerts** sub menu as shown in Figure 3.9 appears:

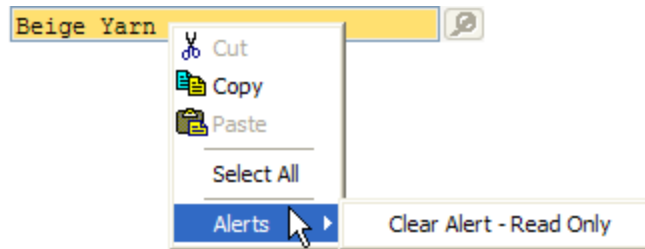


**Figure 3.9 – Case 1. Alerts Sub Menu**

4. Select the alert type from the **Alerts** sub menu;  
This opens the alert's detail screen, containing its current settings;
5. Modify the alert;
6. Click the **Save** button.



**Note:** If the **Alerts** sub menu as in Figure 3.10 appears and the Read Only option for that alert is enabled; you cannot modify the alert.



**Figure 3.10 – Case 2. Alerts Sub Menu**

	<p><b>Note:</b> When selecting a field with an applied alert, if the full Alerts menu is shown, then the field inherited the alert from another location. From the Alerts menu, your only option is to create a new alert overriding the inherited alert. This is not a recommended practice as the inherited alert may be used as guidance for the user base.</p>
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Active alerts can be re-visited and modified as many times as needed *until* they are cleared, deactivated, or if they expire.

### Clearing Alerts

To clear an active alert:

1. Place the mouse pointer over the field containing the alert to be cleared
2. **Right click** the mouse on that field
3. Place the mouse pointer over the **Alerts** menu point. The **Alerts** sub menu in either Figures 3.9 or 3.10 appears\*
4. Select **Clear Alert** for Figure 3.9 or select **Clear Alert – Read Only** for Figure 3.10 depending on the presented situation.

\* When selecting a field with an applied alert, if the full Alert menu is shown, then the field inherited the alert from another location. The alert cannot be cleared from the current field location; the alert may be accessed from the blank form (i.e. no selected record).

- Clearing an alert deactivates the alert, changing its status from active to inactive. Inactive alerts do not appear in fields and cannot be reapplied.
- Clearing alerts which also appear in other field locations as inherited alerts concurrently removes/deactivates these inherited alerts.
- Clearing an alert removes its listing on the Reminders screen.

Once an alert is cleared from a field, a new alert may be immediately applied to the same field.

## Matrix Alerts

With respect to the Enhanced Alert System, each matrix **row** is treated as a field. In other words, an alert associated to a matrix cell is associated to its entire row.

To create, modify or clear matrix alerts, please follow the previously suggested steps within this document. In order to apply a new alert, place the mouse pointer anywhere on the desired matrix row.

Once an alert is associated to a row, the category colour will highlight the field containing the row name. To view the alert message in a tooltip, place the mouse pointer over the field containing the row name. By design, the user cannot associate an alert to a specific matrix cell. It is recommended that the alert note field contain a detailed message in this or any other case. An example of a matrix alert is shown in Figure 3.11.

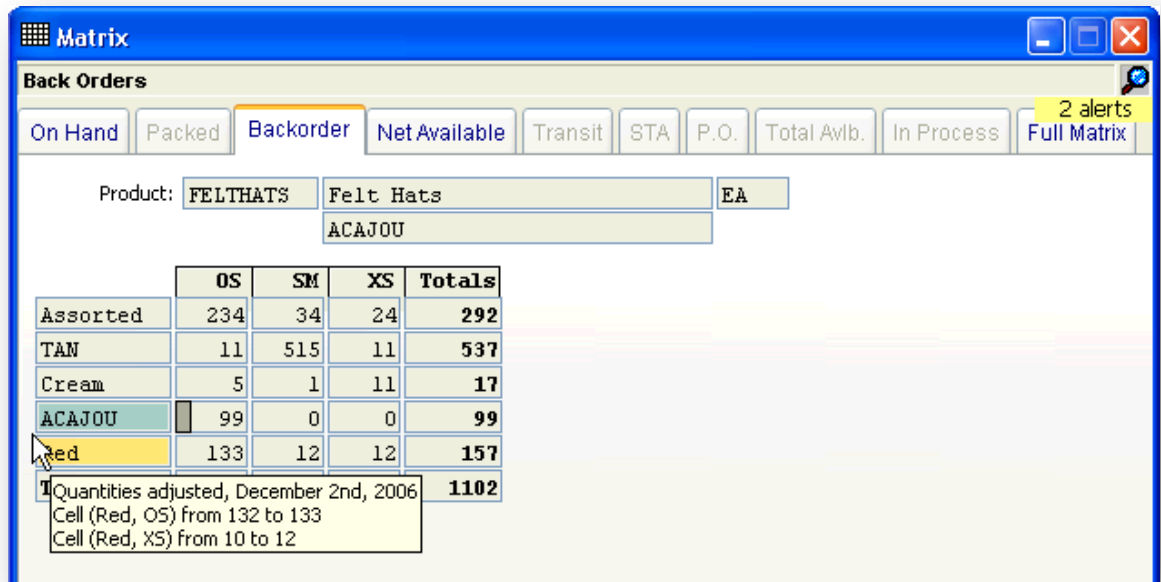


Figure 3.11 – Example of a Matrix Alert

## FORMS SUPPORTING EAS

### Forms and Record Alerts

#### ALERTS LISTING

Any form containing alerts will display the total number of active alerts in its upper right hand corner. By hovering over this area, a tooltip appears listing the location of the alerts by displaying the tab\* and specific field for each alert, see Figure 4.1. For matrix alerts, the tooltip lists the tab location followed by the matrix row name, see Figure 4.2.

\*'Anywhere' replaces the tab location for alerts appearing in more than one location, see sections Inherited Alerts and Cross Tab/Screen Alerts for more details.

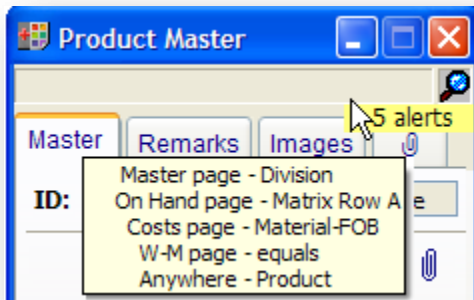


Figure 4.1 - Standard Form

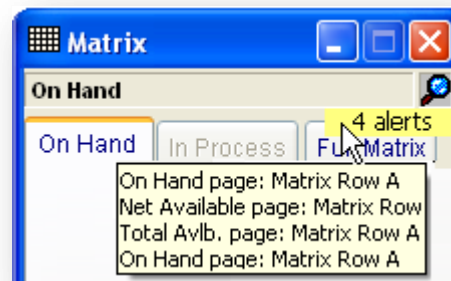


Figure 4.2 - Matrix Form

#### BLANK FIELDS

Alerts applied on empty forms are not visible at the record level. This feature may be used as interactive field level guidance to TriForce XP users, see Figure 4.3.

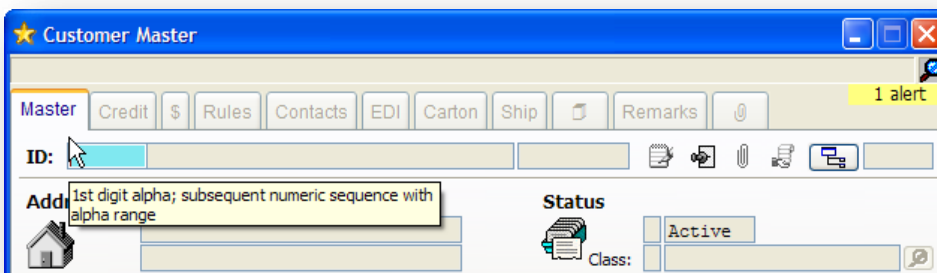


Figure 4.3 – Alert associated to a field on an blank form

## CUSTOM FIELDS

For custom fields, it is recommended that the setup for all fields is complete before associating alerts. If a change in setup is required, remove all existing alerts, make the necessary changes, and then reapply the alerts. By changing the settings related to a custom field, the user runs the risk of altering the location of the applied alerts.

## Inherited Alerts

Inherited alerts are alerts appearing in fields as a result of an active alert elsewhere in the system. Fields containing inherited alerts are usually those associated to lookups. Examples are shown in Figures 4.4 and 4.5.

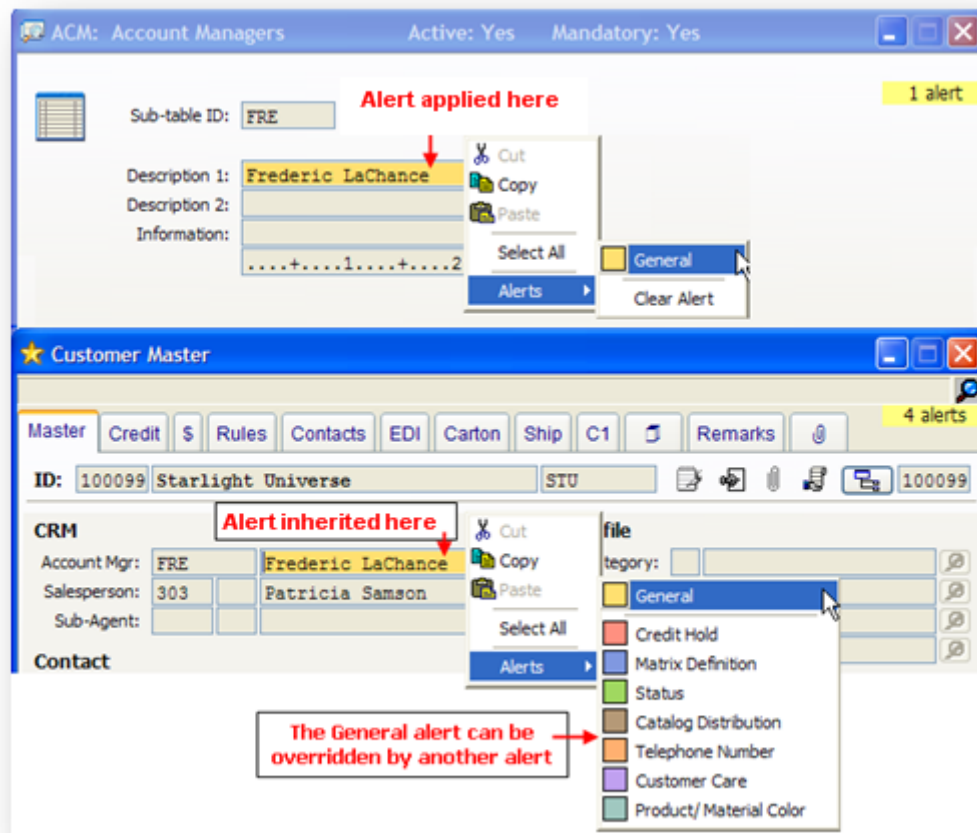
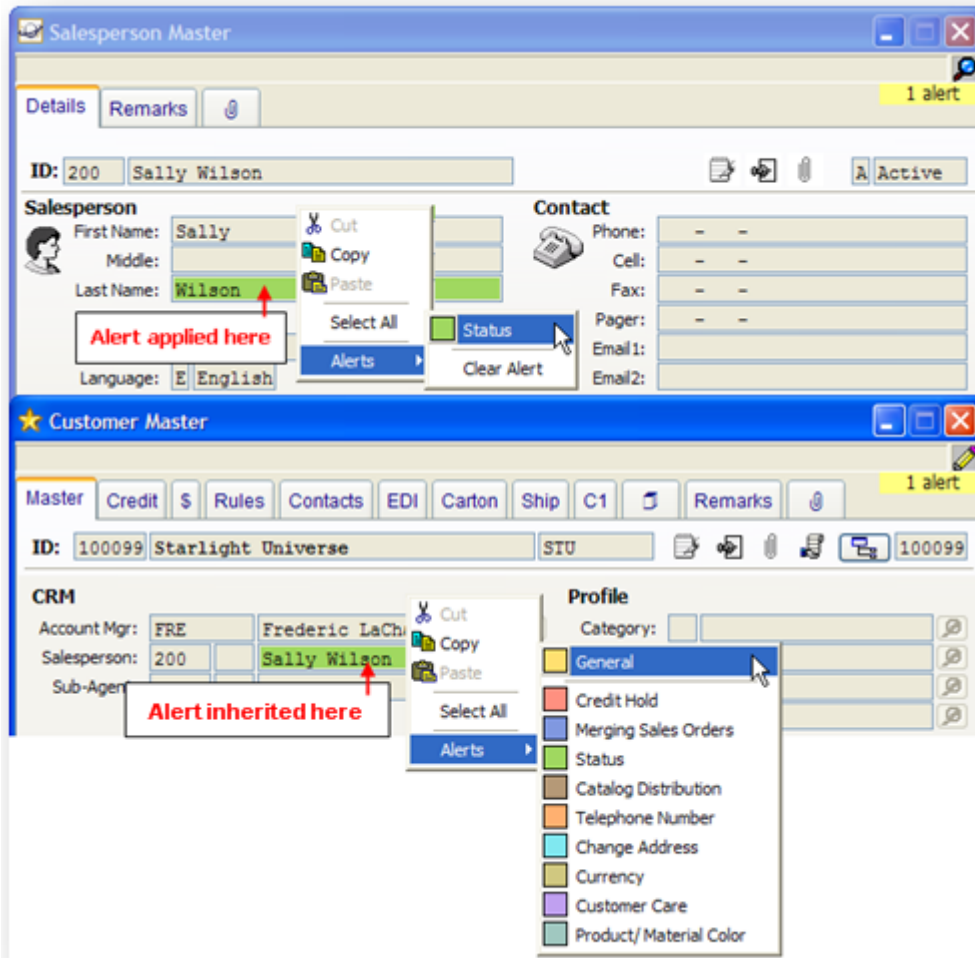


Figure 4.4 – Inherited Alert (1)



**Figure 4.5 – Inherited Alert (2)**

In Figures 4.4 and 4.5, alerts may be created in fields containing inherited alerts. These new alerts would override the inherited alerts. Figure 4.6 demonstrates the result of creating an alert for field Salesperson in Customer Master of Figure 4.5.

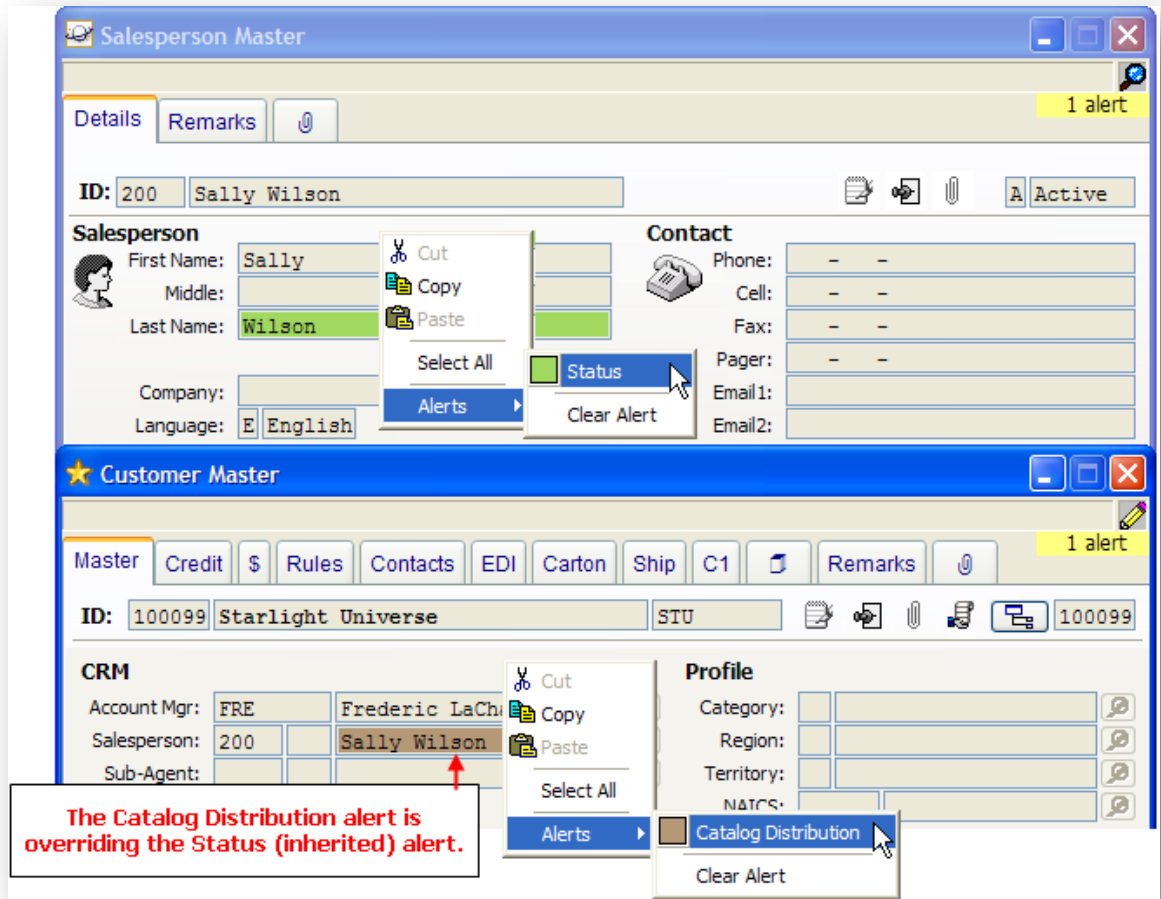


Figure 4.6 – Applying an alert to a field containing an inherited alert

## CROSS TAB / SCREEN ALERTS

Fields having the same field names and sharing the same data across different tabs and different screens also **share** alerts, see Figure 4.7.



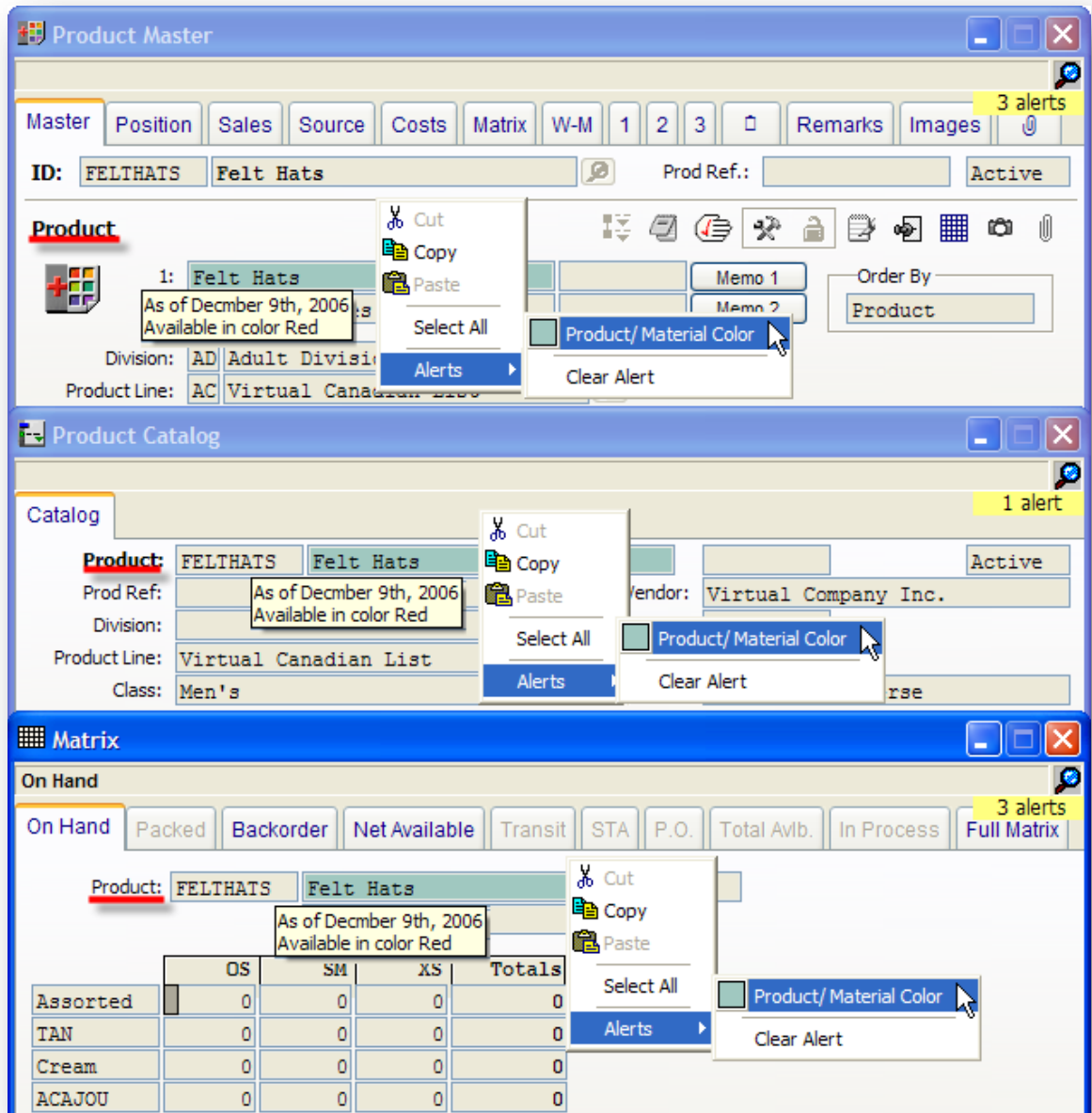


Figure 4.7 – Fields sharing the same alert

The alert can be accessed and modified from any of the three locations. Notice that all three alerts share the same field name, i.e. Product.



Fields in tabs containing Grid Views do not share alerts.

## List of Forms Supporting EAS

The following table lists the forms currently supporting EAS functionality. Initial emphasis was placed on important Master files and transactions where the data is in a recallable form.

**Table 4.1 - List of Forms supporting EAS**

Menu Title	Sub Menu Points
<b>Actions</b>	Sales Order/ New-Change
	Shipping/ Ship
	Shipping/ Ship Maintenance
	Billing/ New-Change
	Procurement (Purchase Order)/ New-Change
	Manufacturing/ Materials Allocation
	Manufacturing/ Scanned Allocation
	Manufacturing/ Change
	Manufacturing/ Materials Consumption
<b>View</b>	Billing/ QuickView
	Billing/ PowerView
	Sales Order/ QuickView
	Sales Order/ PowerView
	Sales Order/ Order Fulfillment
	Purchase Order/ QuickView
	Purchase Order/ PowerView
<b>Master</b>	Customer
	Parent
	Shipping Address
	Salesperson
	Vendor
	Product/Item
	Product/Item Inquiry
	Product/Item Catalog
	Material
	Material Inquiry
	Material Catalog
	Matrix Definitions
	General Accounting/ GL Accounts
	System Remarks

Upon request, the Enhanced Alert System may be expanded to Forms/Screens that do not currently support EAS.