

SharePoint Alert Reminder Boost 2.0 Tutorial for SharePoint 2010

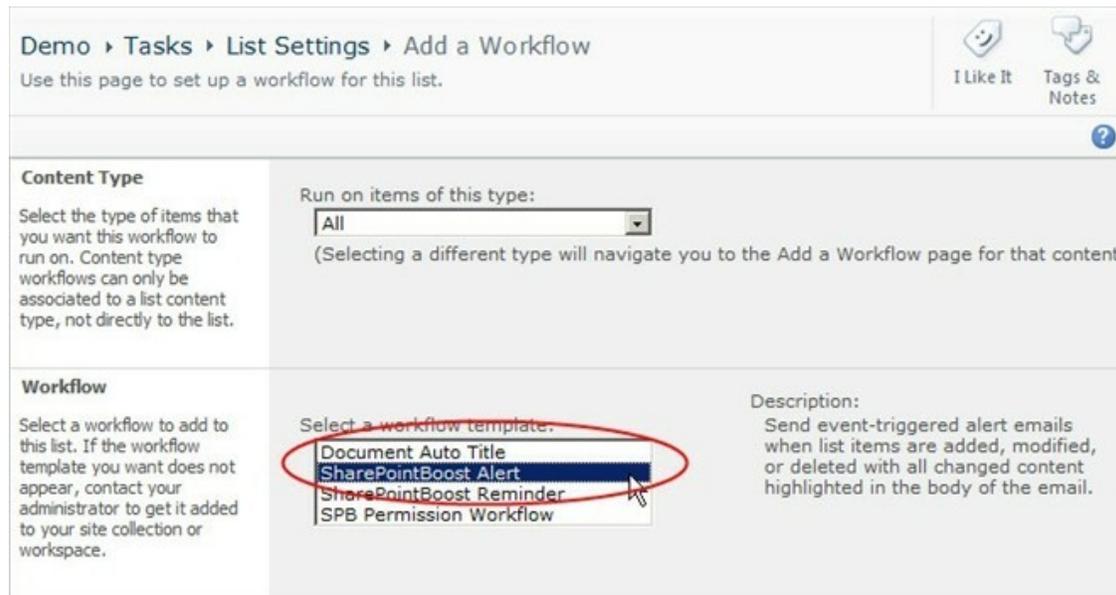
1. Introduction to SharePoint Alert Reminder Boost

SharePoint Alert Reminder Boost is a combination of two SharePoint alert workflows that send detailed, fully-customizable e-mail and SMS event-triggered notifications to users whenever an item is created, modified, or deleted. Changes made are highlighted and time-triggered reminders can be sent automatically at customizable intervals.

2. The SharePointBoost Alert Workflow

2.1. Adding the SharePointBoost Alert Workflow to a List

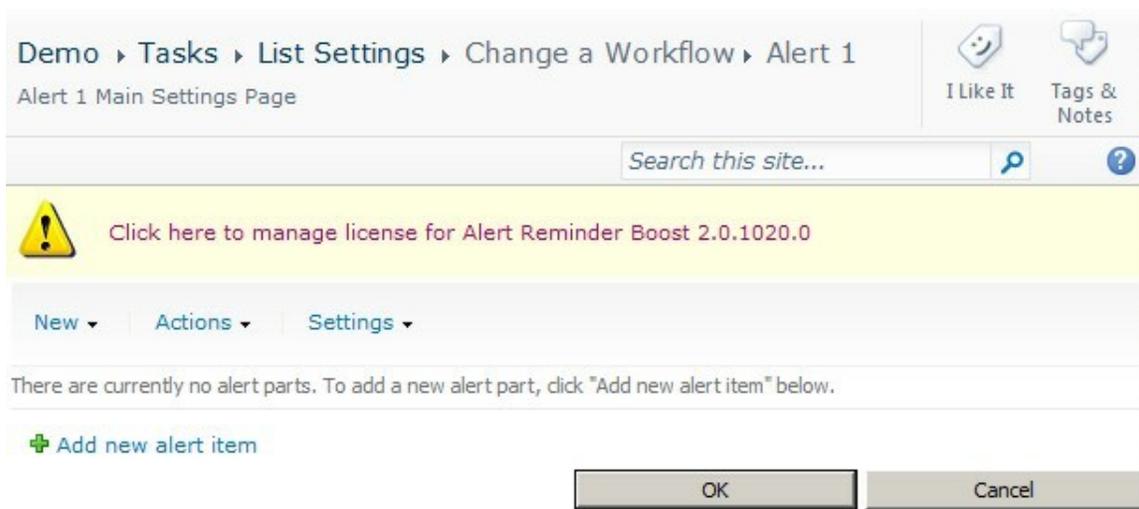
i. Enter the Workflow Settings page for a SharePoint list (we shall use the "Tasks" list as an example), click "Add a workflow", and then select the SharePointBoost Alert workflow from the workflow template list.



ii. Give your workflow a name (we shall call it "Alert 1") and then select a task list and history list for it.

iii. Tick the "Start this workflow when a new item is created" and "Start this workflow when an item is changed" checkboxes if you wish to start this workflow automatically.

iv. Click "Next" to bring up the Main Settings page for "Alert 1"



v. The Main Settings page for your workflow allows you to:

Add a new alert item

Import or export workflow settings

Specify SMTP server settings for sending e-mail notifications

Specify SMS server settings for sending SMS notifications

Specify the exit workflow condition (see Sections 2.2.2.1. and 2.2.2.2. for more details on setting up conditions)

As no alert items have been added, the list will initially be empty, click the "Add new alert item" button to bring up the "Add or Change Alert Item" page where you can add and configure a new alert item for this workflow.

2.2. Configuring the SharePointBoost Alert Workflow

In the "Add or Change Alert Item" page for your workflow, give your alert item a title and specify whether you wish to be alerted by e-mail or SMS messaging.

The page also displays 5 tabs for configuring the alert part ("Event", "Condition", "Message View", "External Path", and "Note Settings").

Demo ▶ Tasks ▶ List Settings ▶ Change a Workflow ▶ Alert 1

Add or Change Alert Item

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Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

Communication Type
Specify the type of communication you want to use. E-Mail SMS Message

Event Condition Message View External Path Note Settings

Change Type
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

- All changes
- New items are added
- Existing items are modified
- Items are deleted

When to Send Alerts
Specify how frequently you want to be alerted.

- Send notification immediately
- Send a daily summary
- Send a weekly summary

Time:

The maximum of items in summary

2.2.1. Specifying the Changes I Want to be Alerted to and How Often

In the "Event" tab of the "Add or Change Alert Item" page for your workflow, you can configure what item changes you wish to be alerted to and how often you wish to be alerted.

2.2.2. Specifying Which Items in the List Generate an Alert

In the "Condition" tab of the "Add or Change Alert Item" page for your workflow, you can configure what items and under what conditions alerts will be generated.

All Items – Any change made to any item in the list will generate an alert.

Item from List View – Any change made to any item in the specified list view will

generate an alert.

Items from Condition – Alert will be generated if certain conditions are met (see below).

2.2.2.1. Basic Conditions Explained

The "And" operator – All conditions linked by the "And" operator must be met before an alert is generated.

The "Or" operator – An alert will be generated if any of the conditions linked by the "Or" operator is met.

The "Add Condition" operator – Click this operator if you wish to add an additional condition.

The "Add Group" operator – Click this operator if you wish to add a condition group.

Take the following set of conditions as an example:

The screenshot shows a configuration interface with several tabs: "Event", "Condition", "Message View", "External Path", and "Note Settings". The "Condition" tab is active. Below the tabs, the heading "Which Items in the List Generate an Alert?" is followed by three radio button options: "All Items", "Item from List View", and "Items from Condition" (which is selected). Below this, the "Condition Category:" section has two radio button options: "Basic" (selected) and "Advanced". A red "And" label is positioned above the first two conditions: "Due Date is less than or equal to [Today]" and "Status is not equal to Completed". A red "Or" label is positioned above the next two conditions: "% Complete is less than 80%" and "Priority is equal to (1) High". Each condition has a small "X" icon to its right for removal.

In this case an alert will be generated if:

[The "Due Date" column is less than or equal to "Today"]

AND

[The "Status" column is not equal to "Completed"]

AND

[The "% Complete" column is less than "80%" OR that the "Priority" column is equal to "(1) High"]

To delete any of the conditions, click the red cross next to a particular condition.

2.2.2.2. Advanced Conditions Explained

Select the "Advanced" condition category and you will be prompted to convert the conditions specified in the basic condition section (if any) to advanced conditions. For our above example, the following is displayed after the conversion:

The screenshot shows a configuration interface with several tabs: "Event", "Condition" (selected), "Message View", "External Path", and "Note Settings".

Which Items in the List Generate an Alert?

- All Items
- Item from List View
- Items from Condition

Condition Category:

- Basic
- Advanced

Condition Help

```
[Due Date] <= [Today] && [Status] != "Completed" && ([% Complete] < 0.8 || [Priority] == "(1) High" )
```

[Insert column...] [Insert operator...] [Insert function...]

Column Help Operator Help Function Help

Function Help Tip

Test Test Successful!

You can check to see if the conditions entered are valid by clicking the "Test" button.

For a detailed explanation on how to use the Advanced Conditions, click on one of the corresponding help links.

2.2.3. Setting Up the Notification Message

Click the "Message View" tab where you can specify your notification message.

Event Condition **Message View** External Path Note Settings

E-Mail Header

From...	
To...	
CC...	
BCC...	
Exclusion...	
Subject..	

E-Mail Body

Format HTML Plain Text

- Send item attachments as attachments in notification e-mail
- Include item information in notification e-mail
 - Include mobile hyperlink
 - Customize displayed fields and order
- Include custom content in notification e-mail

The section under "E-Mail Header" allows you to specify the notification sender, the recipient, CC and BCC fields, the subject, as well as anybody you wish to exclude from receiving this notification.

Click on one of the e-mail header buttons to set detailed user information for each field. You can even pull users from the current list or external lists.

To [X]

Select Users
You can enter user names, group names. Separate them with semicolons.

Users/Groups

[Empty text box]

Select Person/Group Column
You can select user column.

Person or Group Columns

Current list columns (contains Lookup columns)

- Predecessors.Assigned To
- Predecessors.Task Group
- Predecessors.Created By
- Predecessors.Modified By

External list columns

Get users from external list columns

Site (click to edit)	List	Columns
There are currently no external list columns. To add a new external list column, click "Add external list column" below.		
<input type="button" value="Add external list column"/>		

E-Mail Address
Specify e-mail addresses or columns containing e-mail address information, separating multiple addresses with a comma (,) or semicolon (;).

E-mail addresses or columns containing e-mail addresses

[Empty text box]

[Insert column...]

OK Cancel

The section under "E-Mail Body" allows you to set up the e-mail itself.

2.2.4. Specifying the External Path to My Web Application

The "External Path" section allows you to set different external paths to your web application. You can choose to use the default host path, select from one of the custom alternative access mappings links or use a link you specify.

The screenshot shows a configuration interface with five tabs: "Event", "Condition", "Message View", "External Path", and "Note Settings". The "External Path" tab is selected and highlighted. Below the tabs, the "External Path" section contains three radio button options: "Using default host path" (which is selected), "Select alternate access mappings", and "Enter a new site collection's URL". A dropdown menu is positioned between the second and third options, and a text input field is located below the third option.

2.2.5. Sending Reminder Prior to Being Notified

Users can also be reminded via e-mail prior to being notified every time. To set this up, click the "Note Settings" tab.

3. The SharePointBoost Reminder Workflow

3.1. Adding the SharePointBoost Reminder Workflow to a List

- i. Enter the Workflow Settings page for a SharePoint list (we shall use the "Tasks" list as an example), click "Add a workflow", and then select the SharePointBoost Reminder workflow from the workflow template list.
- ii. Follow the rest of the steps in Section 2.1.

3.2. Configuring the SharePointBoost Reminder Workflow

In the "Add or Change Reminder Item" page for your workflow, give your alert item a title and specify whether you wish to be alerted by e-mail or SMS messaging.

The page also displays 5 tabs for configuring the reminder part ("Recurrence", "Condition", "Message View", "External Path", and "Note Settings").

Demo ▸ Tasks ▸ List Settings ▸ Change a Workflow ▸ Reminder 1

Add or Change Reminder Item

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Search this site...

OK Cancel

Reminder Title
Enter the title for this reminder. This is included in the subject of the e-mail notification sent for this reminder.

Communication Type
Specify the type of communication you want to use. E-Mail SMS Message

Recurrence Condition Message View External Path Note Settings

Minutely **Pattern**
Every minutes

Hourly
 Daily
 Weekly
 Monthly
 Yearly

Date Range
Start Date

No end date
 End after: occurrence(s)
 End by:

Time Range
Starting every day between
and no later than

3.2.1. Specifying When and How Often I Want to be Reminded

Click the "Recurrence" tab where you can specify when and how often you wish to be reminded. Take the following screenshot as an example:

Recurrence	Condition	Message View	External Path	Note Settings
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Minutely
 Hourly
 Daily
 Weekly
 Monthly
 Yearly

Pattern
 Every minutes

Date Range

No end date
 End after: occurrence(s)
 End by:

Start Date

Time Range
 Starting every day between

 and no later than

In this example, a reminder will be sent every 5 minutes from 9am on 10/26/2010 and will end after 10 reminders have been sent if the conditions for sending reminders are met.

3.2.2. Specifying Which Items in the List Generate a Reminder

See Section 2.2.2.

3.2.3. Setting Up the Reminder Notification Message

See Section 2.2.3.

3.2.4. Specifying the External Path to My Web Application

See Section 2.2.4.

3.2.5. Sending Reminder Prior to Being Notified

See Section 2.2.5.