

# Product Tutorial

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KnowledgeSync is a Business Activity Monitoring (BAM) application that enables organizations to monitor one or more application databases (and incoming e-mail messages) for critical, time-sensitive conditions of data.

When these conditions occur, KnowledgeSync can send out alert messages (via e-mail, fax, pager, PDA, cell phone, and the web), it can generate Forms, Documents, and Crystal Reports, and it take can appropriate “response actions” such as updating one or more underlying applications with pertinent details, such as the details of what happened and what *has to happen* to address the situation.

This tutorial is meant to provide you with a brief tour of the KnowledgeSync application; those options and functions that are not discussed in this chapter will be completely detailed in the chapters that follow.

For the purpose of this tutorial, you will be using a sample sales application database that was created in Microsoft Access and is shipped as part of the KnowledgeSync solution.

This tutorial will guide you through the creation of two alert events:

- An event that notifies you if there are any orders that have been shipped later than their “required by” date
- An event that notifies you about a specific product that has sold less than ‘x’ dollars last week

## Before You Begin

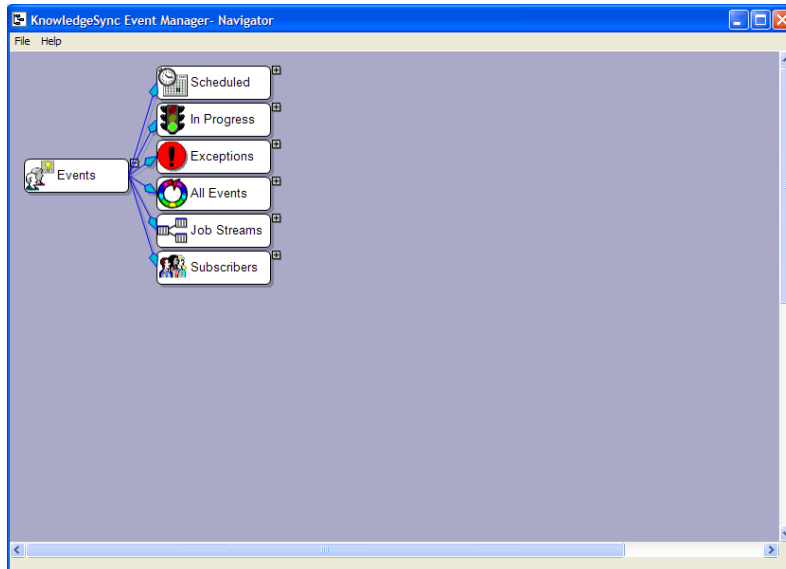
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Before you can proceed with this tutorial, you must have successfully completed all of the installation and configuration steps outlined in chapter one.

## The Event Manager: Overview

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Log into the KnowledgeSync Event Manager Navigator module (default user name is “Admin” and there is no password); you will see the following window:



### KNOWLEDGESYNC EVENT MANAGER NAVIGATOR

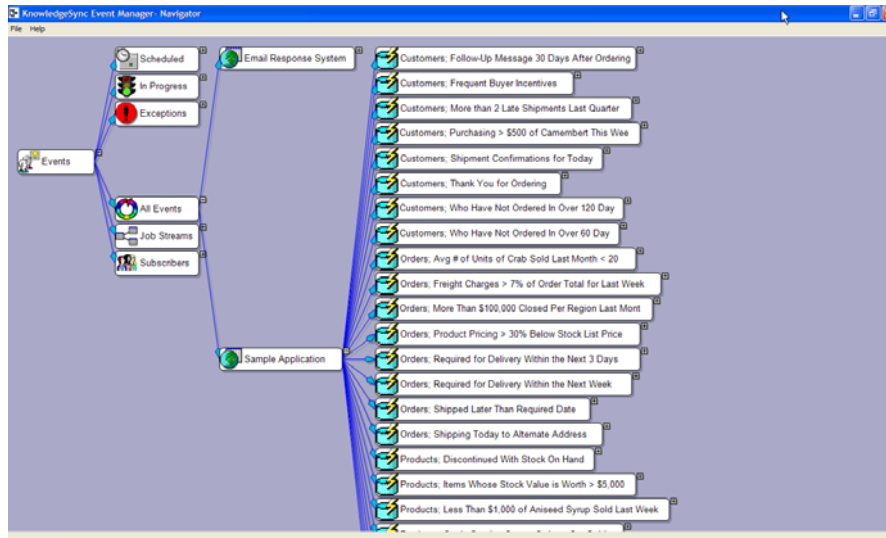
The Navigator module presents you with following options:

- **Scheduled:** View events that are currently scheduled to be submitted to run
- **In Progress:** View events that are currently in the process of being executed
- **Exceptions:** View & correct any errors that have occurred in the execution of KnowledgeSync events
- **All Events:** Add, view, & modify events (or event components)
- **Job Streams:** Add, view, and modify Event Job Streams. (Job Streams are linked events that run in a sequential manner.
- **Subscribers:** Add, view, and modify subscriber (alert recipient) records.

Within the “All Events” branch, there are sub-branches that list the applications whose data KnowledgeSync is eligible to monitor and respond to. Within each of these sub-branches is a list of the events that KnowledgeSync is configured to run.

- Expand the “All Events” branch and then the “Sample Application” sub-branch. (If the “Sample Application” does not exist in your version of the software, please skip to the following sections for details on adding the “Sample Application” to your KnowledgeSync database.)

You will see a window such as the following:



### THE SAMPLE APPLICATION'S EVENTS

Each event consists of multiple components; the first of which is the “triggering condition” that the event is based on. In KnowledgeSync, a triggering condition is known as a “query” and an event can have one or more queries associated with it.

An event not only specifies what query it will use, it also specifies such items as whom you wish to notify if the event is triggered, what message you wish to send to the event’s “subscribers”, how often you wish to check for the event’s conditions, and what kind of workflow response (if any) the event should execute.

## If the “Sample Application” Does Not Exist

This tutorial uses a small Microsoft Access application called “Sample Application”. Depending on your KnowledgeSync installation, this application may or may not be pre-loaded into your Event Manager.

If it is not pre-loaded in your Event Manager, follow “Step 1” in the preceding chapter to create an ODBC Data Source for this application and to add that application to the Event Manager module.

Note that the “Sample Application” uses a Microsoft Access database called “KS\_Sample.mdb” and this data file is located in the KnowledgeSync Data folder. Note also that the “KS\_Sample.mdb” database does **not** allocate a KnowledgeSync database connection license.

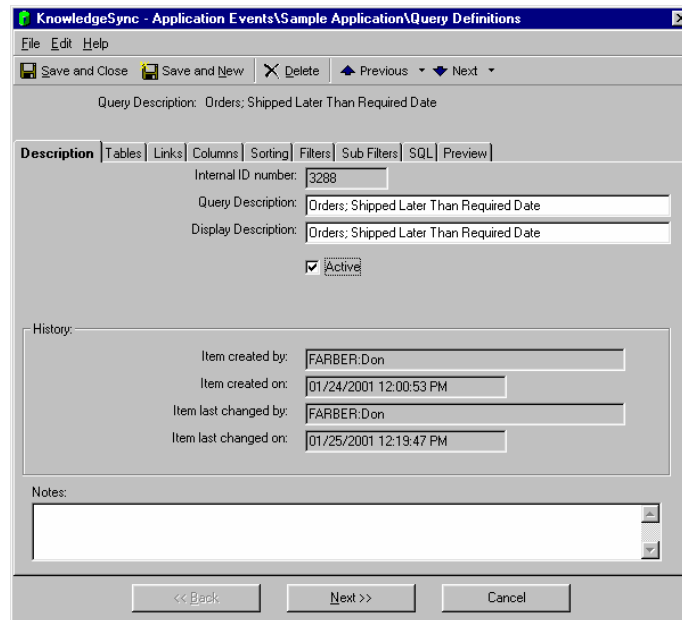
## Create a “Record-Level” Event

The first event that you are going to create is referred to as a “record-level” event because it is triggered by the existence of individual data records that meet certain conditions.

In this exercise, we will create an event that is triggered if there are orders that were shipped later than their “required” date.

Since the first component of an event is its query, follow these steps to create this new query:

- Beneath the “All Events” branch, right-click on the “Sample Application” branch and choose **New Query**.
- Key in a query description of:  
  
*“Orders; Shipped Later Than Required Date”*
- Press your Tab key so that the query description will be copied into the display description field
- Click the “Active” checkbox.



#### QUERY DESCRIPTION

## Specify the Query's Tables

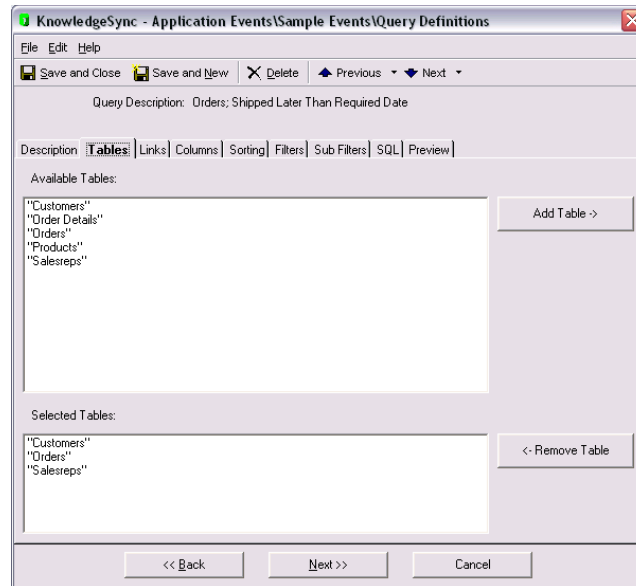
- Click on the “Tables” tab

All of the tables (and views) in the associated application's database are displayed for you under “Available Tables”. You select which tables contain the data that this particular query needs to access. For this event, you will choose the tables that contain the data you might wish to include in an outgoing alert message.

- Double-click (select) the “Customers”, “Orders”, and “Salesreps” tables.

For this query, you are choosing the “customers” table (because you might wish to include the client's name in your alert message), the “orders” table (because this table contains order details such as the required date and ship date), and the “salesreps” table (because you might wish to include the name of the salesrep associated with each order).

If you wish to include application data in an alert message, you must select the table(s) in which that data resides.

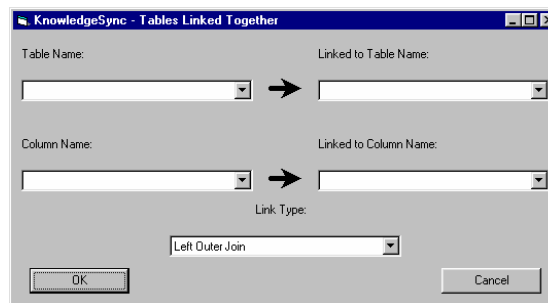


## QUERY TABLES

## Link the Tables

Since we have selected more than one database table, we must tell KnowledgeSync how the tables are linked (or joined) together. If you do not know how tables are linked in a specific database, you'll need to get a copy of the "database schema" of the application you're working with.

- Click on the "Links" tab
- Click on "Add Table Link" button.



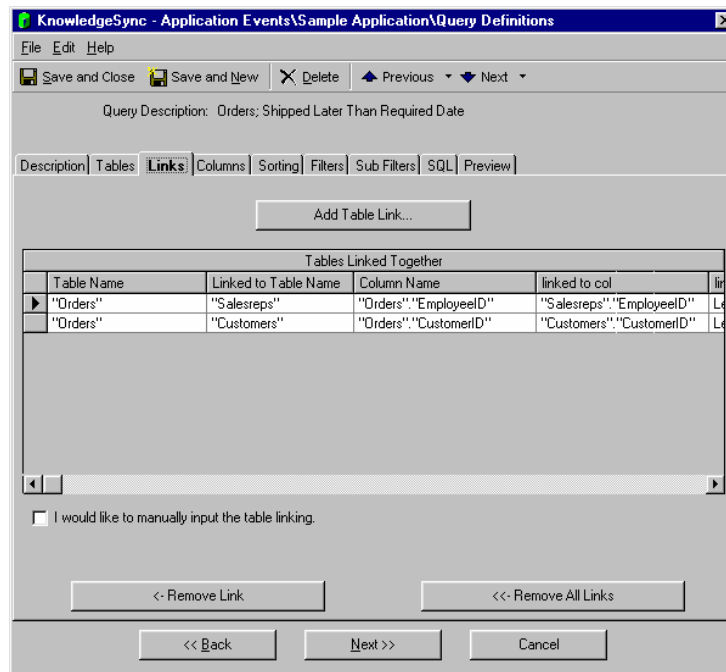
### THE "ADD TABLE LINK" WIZARD

- Under "Table Name", select "Orders."
- For the "Linked to Table Name", select "Salesreps."
- In the "Column Name" field, select "Orders.EmployeeID." The "Linked To Column Name" will automatically retrieve "Salesreps.EmployeeID" and the link type may be left as "left outer join". ("Left Outer Join" is the standard method for linking the vast majority of database tables.)
- Click on "OK".

You have successfully linked the “Orders” and “Salesreps” tables. Next, you need to bring in the “Customers” table, so you’ll create a link between the “Orders” and “Customers” tables.

- Click on “Add Table Link” again.
- Under “Table Name”, select “Orders.”
- For the “Linked to Table Name”, select “Customers.”
- In the “Column Name” field, select “Orders.CustomerID.” The “Linked To Column Name” will automatically retrieve “Customers.CustomerID” and the link type may be left as “left outer join”.
- Click on “OK”.

Note that when you link tables together, the first table you select **must** be the query’s primary table, (i.e., the table whose records the query reads first).



**THE RESULTING LINKED TABLES**

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## Select the Query’s Columns (Fields)

Part of designing a query is to select those fields of data that you might wish to include in your alert messages.

Select (double-click on) the following fields from the window titled “Available Columns to Query:”

**[From the “customers” table]**

- Company Name

**[From the “orders” table]**

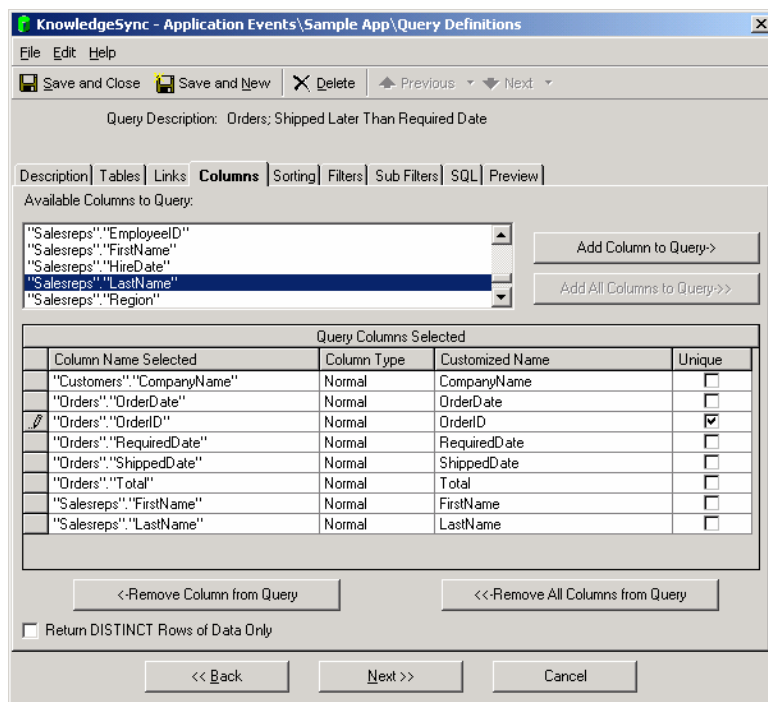
- Order Date
- Order ID
- Required Date
- Shipped Date
- Total

**[From the “salesreps” table]**

- First Name
- Last Name

Note the “Unique” column. If you do ***not*** identify a unique column, a single record will trigger (i.e., send an alert) repeatedly each time the record meets the query’s criteria. If you ***do*** identify a unique column, you will have the ***choice*** as to whether you would like the same record to trigger alerts over and over, or whether you would like the record to trigger an alert only the first time the record meets the query’s criteria.

- Place a checkmark in the “Unique” column of the Order ID field.



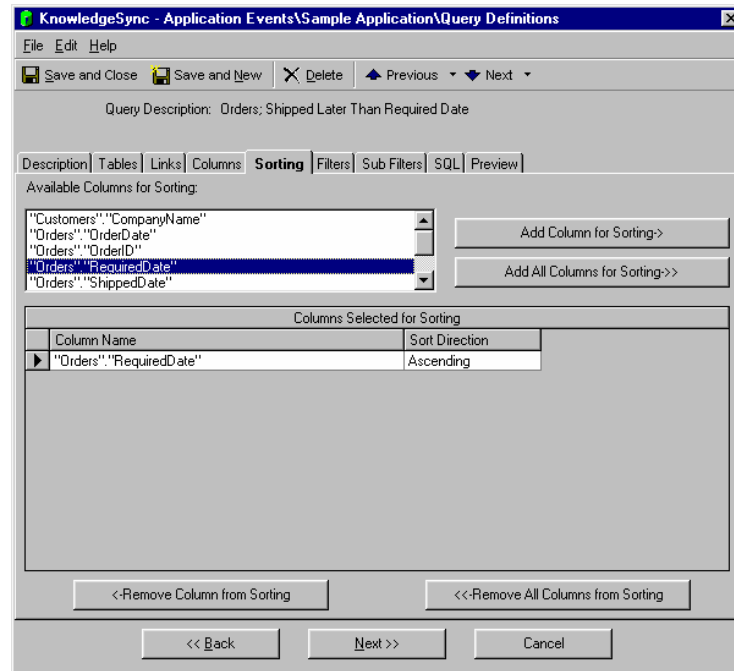
**COLUMNS SELECTED FOR THE QUERY**

## Select the Query’s Sorting Order

When KnowledgeSync checks for this query’s conditions (orders shipped late), KnowledgeSync may find just a single matching order, or it may find two, five, ten, or more orders. If multiple matching records (i.e., orders) are found, KnowledgeSync will use the “Sorting” tab to determine the order in which retrieved records will be organized.

- From the list of “Available Columns for Sorting”, double-click on the “Required Date” field.

- Choose a sorting order of “ascending” so that the orders will be listed in chronological sequence, starting from the orders that have the earliest required dates.



**THE QUERY'S SORTING ORDER**

## Specify the Filter

The “Filters” tab lets you specify the condition(s) that records must meet in order for them to be retrieved by the query. KnowledgeSync filters can test for such conditions as:

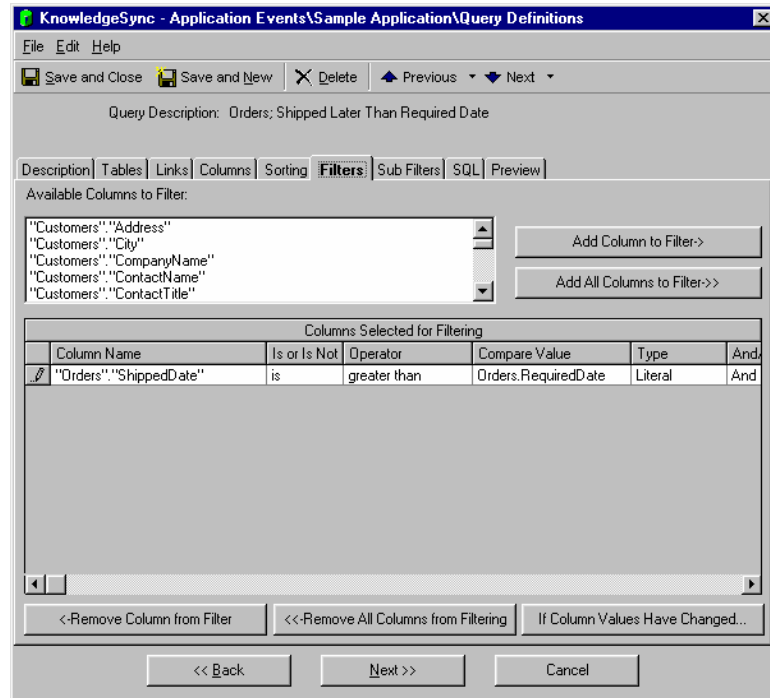
- Sale amount greater than ‘x’
- Customers in industry ‘y’
- Opportunities forecast to close today, tomorrow, next week, or next month
- Sale amount, multiplied by its probability, greater than ‘z’
- Date “shipped” is later than the “required” date

For this query, you’ll be using the last of these examples as your filter. Follow these steps:

- In the “Available Columns to Filter” list, select (double-click on) the “Orders.ShippedDate” field.
- Leave the value of “is or is not” as “is”.
- Click in the “Operator” field, click on the drop-down arrow that appears, and change “equal to” to “greater than.”
- Click in the “Compare Value” field, remove the ‘?’ and type in “Orders.RequiredDate” (without the quotation marks).

- Since you are comparing one field against another, you need to tell KnowledgeSync that the value in the “compare field” is to be translated into its actual (or “literal”) value. Click in the “Type” field, click on the drop-down arrow that appears, and change “Date” to “Literal.”
- Leave the rest of the columns with their default values.

Your resulting filter window should look like the following:



**THE QUERY'S FILTER**

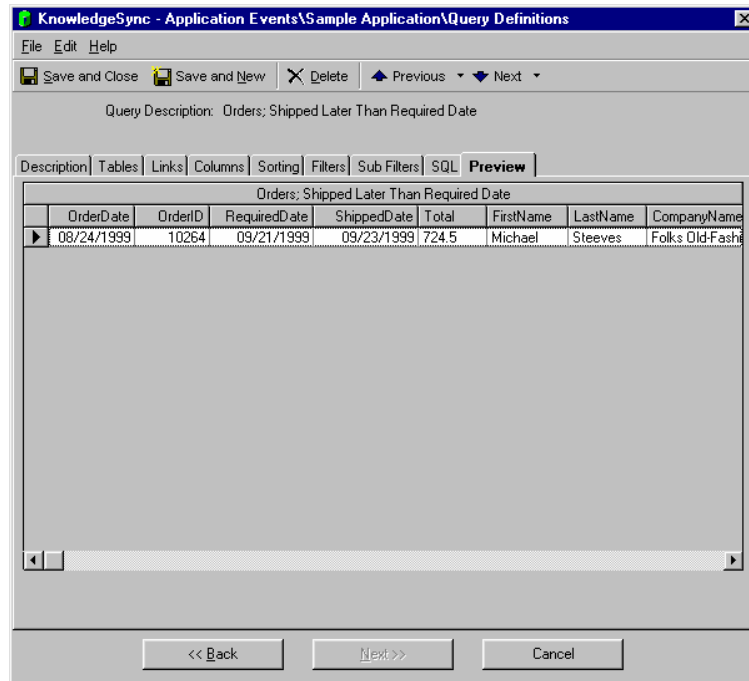
## Skip the Sub-Filter Tab

The “Sub Filters” tab is not used in the design of record-level queries; it is used only with an aggregate query which we will design a little later.

- Leave the “Sub Filters” tab blank.

## Preview the Results of the Query

The “Preview” tab lets you review the results of your query. When you click on this tab, you should see a single record such as in the following illustration:



### PREVIEW THE RESULTS OF YOUR QUERY

- Click on “Save and Close” at the top left of your window to save your query.

If you need to go back and make changes to any of the query design information, simply click on the appropriate tab.

## Add the Event

Now that you have created a query, the next step is to configure the event that uses this query.

KnowledgeSync separates queries and events so that a single query can be used in multiple events. For example, a single query that identifies “sales of greater than ‘x’ dollars” could be used in the following three events:

- Sales of Greater than \$10,000
- Sales of Greater than \$25,000
- Sales of Greater than \$50,000

Follow these steps to continue with the creation of your event:

- Beneath the “All Events” branch, right-click on the “Sample Application” branch and choose **New Event**.
- Key in a description of “Orders; Shipped Late.”
- Leave the “Lookup Key” field blank
- The “Priority” field is used only if you have multiple events that are due to be executed at the same time; higher priority events are executed first. Select a priority of “5”

- Check the “Active” box.
- Do not check the “Repeat” box. (You want to be notified only once for each order that was shipped late.)
- Check the “Keep only last checked record in Monitor” box. (This keeps the amount of history that KnowledgeSync retains to a minimum.)

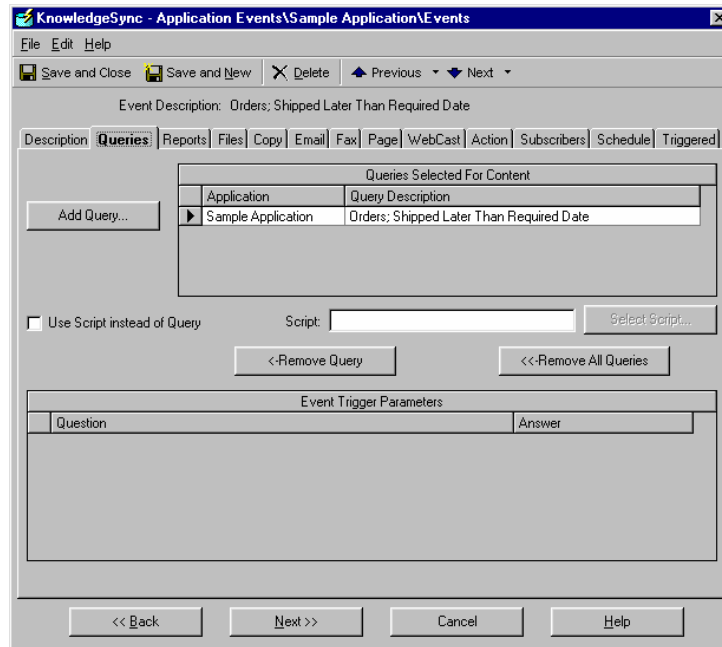
**THE EVENT'S DESCRIPTION**

## Link the Query to the Event

The next step is to link the query that you just designed to this event.

- Click on the “Queries” tab
- Click on the “Add Query” button.
- Select the query you were just working with.

The grid at the bottom of this window will remain empty since the query included only a single filter and its “compare values” were identified on the query level. (You can design queries whose filter values can be identified on the event level as well.)



THE EVENT'S QUERY

## Specify the E-Mail Alert Message Text

One of the ways that KnowledgeSync can respond to a “triggered” event is to send out alert messages. (Other responses include generating Forms, Documents, and Crystal Reports, and updating one or more applications based on the triggered event.)

KnowledgeSync can send out alert messages to any number of people (employees, clients, prospects, and business partners) via the following methods:

- E-Mail
- Fax
- Pager / PDA / Cellular Phone
- Screen Pop
- Copy / FTP
- Webcast

For the purpose of this event, you will be skipping over the “Reports”, “Files”, and “Copy” tabs, and will be configuring the event to send out e-mail alerts only.

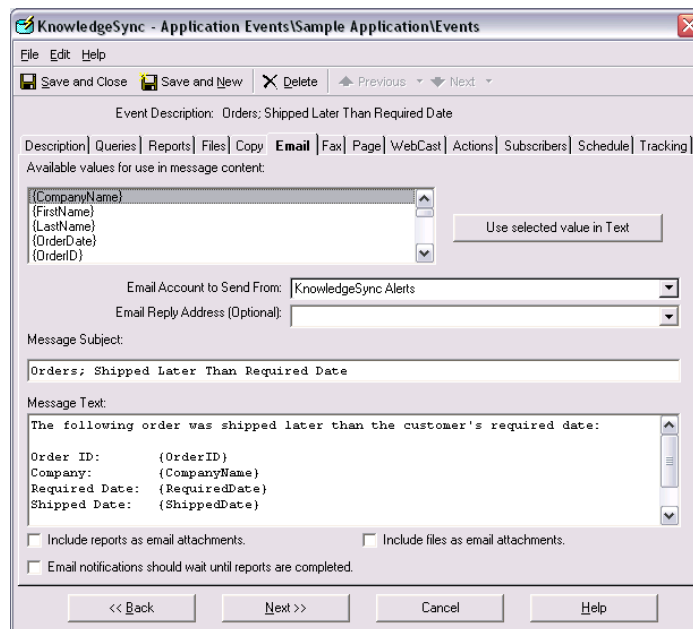
- Click on the “E-mail” tab.
- Enter (or verify) the value in the “E-mail Account to Send From” field. (KnowledgeSync’s e-mail sending account was defined in chapter one.)
- Leave the Email Reply Address field blank.
- Key in a message subject of:
 

***Order Shipped Later Than Required Date***
- In the top line of the e-mail “Message Text,” key in:

***The following order was shipped later than the customer's required date:***

- Press your Enter key to leave a blank line in the message text.
- In lines three through seven of the message text, type in:  
**Order ID:**  
**Company:**  
**Required Date:**  
**Shipped Date:**  
**Salesperson:**
- Position the cursor to the right of the words “Order ID:” in your message text. Use your spacebar to leave some room after “ID:”
- Go up to the list of “Available values for use in message content” and select (double-click on) the field called “{OrderID}”. Notice how this field now appears next to “Order ID:” in your alert message.
- Position the cursor to the right of the words “Company:” in your message text. Use your spacebar to leave some room after this label.
- Go up to the list of “Available values for use in message content” and select (double-click on) the field called “{CompanyName}”. Notice how this field now appears next to “Company:” in your alert message.
- Repeat these steps for the remaining three fields in your alert message. When you get to the “Salesperson” field, put in the “{FirstName}” field, enter a space or two, and then put in the “{LastName}” field. You might also want to use your spacebar to make all the fields line up.

When finished, your E-Mail tab should look like the following window:



#### **THE EVENT'S E-MAIL ALERT MESSAGE**

For this event, you can skip the process of specifying the alert message text for the other notification methods (fax, page, and webcast).

## Event “Response Actions”

As mentioned previously, KnowledgeSync can do much more than just send out alert messages when an event is triggered. KnowledgeSync can:

- Generate one or more Forms, Documents, or Crystal Reports and send those items along with the outgoing alert message
- Send product brochures, Order Confirmations, invoices, or other documents to specific recipients
- FTP specific files to pre-determined locations
- Write “triggered event data” to a file and deliver that file to a specific computer or recipient
- Create records in any front-office or back office application (such as creating a support ticket in an underlying help desk application)
- Update records in any front-office or back-office application (such as updating a contact’s record, or scheduling an activity for a salesrep)
- Pass triggered event data to external technologies, such as a digital display board, or to a synthesized voice response unit.

For the purpose of this event, you will not be configuring any automated response actions, and so may move on to identifying the event’s “subscribers.”

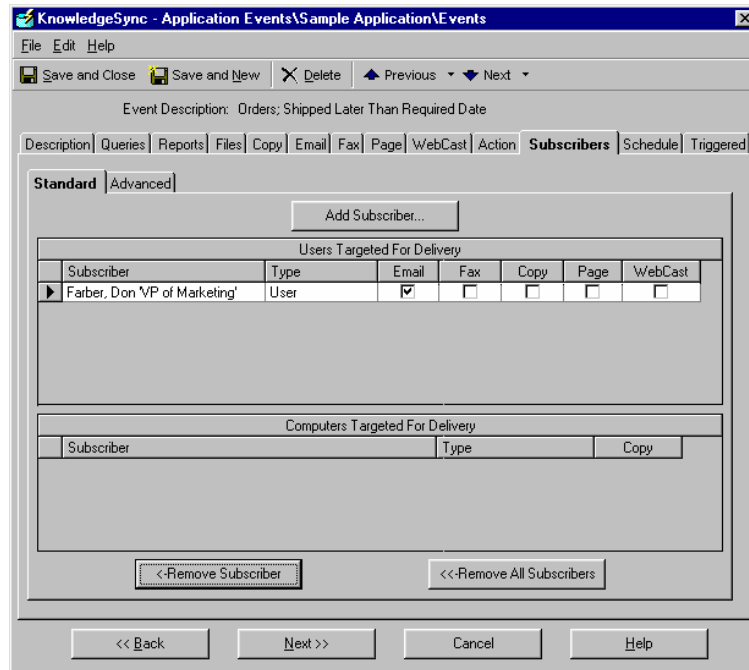
## Specify the Event’s Subscribers

The people who receive KnowledgeSync alerts are referred to as “subscribers.” For any single event, KnowledgeSync can send alerts to an unlimited number of subscribers. These subscribers may be configured within the KnowledgeSync database (as you set yourself up as a subscriber in chapter one), and subscribers may be retrieved from any number of external application databases.

For the current event, you will configure it to send alerts to yourself.

- Click on the “Subscribers” tab.
- Click on the “Add Subscriber” button.
- Click on the plus sign next to the “Sales Team” group.
- Click on (place a checkmark within) the box that appears to the left of your name.
- Click on the “Add Subscriber” button again.

Choose (or verify) “Email” as the method by which you wish to receive notifications about this event (when it is triggered). The completed subscribers window will thus look like the following:



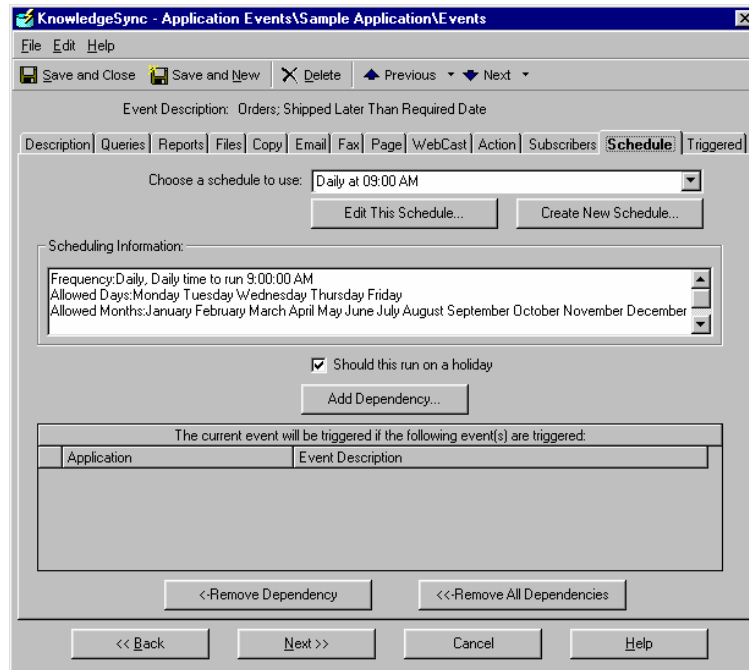
**THE EVENT'S SUBSCRIBERS**

## Specify the Event's Schedule

The final step in the configuration of a KnowledgeSync event is to specify how often you wish KnowledgeSync to check to see if that event has been “triggered.” For this event, you will set KnowledgeSync to check for it everyday at 9:00 in the morning.

Follow these steps:

- Click on the “Schedule” tab.
- Click in the “Choose a schedule to use” field and select the schedule called “Daily at 9:00 AM.” (KnowledgeSync is pre-configured with approximately a dozen schedules, and you can create additional schedules of your own.)
- Leave the rest of the fields on this tab with their default values.



**THE EVENT'S SCHEDULE**

## Save & Close the Event

Note that you do not need to access the “Triggered” tab; this tab will show you the details of when this event was last run and whether any records were triggered. This option also lets you “un-trigger” (or clear) records that had previously been triggered. Since your event has not run yet, this tab will appear empty.

Click on the “Save and Close” button at the top-left of your window to save the event you have just created.

## Create an “Aggregate” Event

The first event you created used a query with a single filter (condition) whose “compare value” was specified on the query level.

The next event will use a query with three conditions and will allow the answers to two of these conditions to be specified on the event level.

In addition, this query will use a KnowledgeSync “aggregate” function. Aggregate functions allow KnowledgeSync to trigger an event based on the condition of a “group” of records. The following are all examples of aggregate events:

- More than 10 orders in the “evaluation” stage of the sales pipeline
- Fewer than 12 activities scheduled for any sales rep this week
- Support reps whose average call length last week is greater than 30 minutes
- More than \$25,000 dollars lost to a specific competitor this month

## Create the Aggregate Query

- Beneath the “All Events” branch in the Navigator, right-click on the “Sample Application” branch and choose **New Query**.
- Key in a query description of:  
  
*Orders; More Than 'x' Dollars from Any Region*
- Press “Tab” to copy the query description to the Display Description and then click on the “Active” checkbox.

## Specify the Query’s Tables

- Click on the “Tables” tab.
- Select (double-click on) the “Customers” and “Orders” tables.

## Link the Query’s Tables

Since this query uses two tables, you need to link them together.

- Click on the “Add Table Link” button.
- In the “Table Name” field, select “Orders.”
- In the “Linked to Table Name” field select “Customers.”
- In the “Column Name” field, select “Orders.CustomerID.” (“Customers.CustomerID” will automatically appear in the “Linked to Column Name” field.)
- Leave the “Link Type” as “Left Outer Join”.
- Click on “OK” to save your link.

## Select the Query’s Columns (Fields)

Aggregate queries are different from record-level queries in that aggregate queries perform one of five arithmetic functions (summarize, count, average, minimum, or maximum) on a specific database field.

As a result, aggregate queries do not require access to many of the detail fields that are commonly found in a record-level query. Since this query will be summarizing (totaling) the sales for specific regions over a specific time range, the first column you need to select is the one you want KnowledgeSync to perform the aggregate function on.

In this query, this field will be the one that contains the sales total for each order.

- Select **Orders.Total** as the first column in your query.

Since this query needs to total the sales for each region, we need to tell KnowledgeSync that it has to total (or “summarize”) the values in each matching order’s “total” field.

- Click in the “Column Type” field for the “Orders.Total” field.

- Click on the drop-down list and select **Summarize**.

And since the goal of this query is to total the orders per region, you need to tell KnowledgeSync that it will “group” (or total) the accumulated order totals **by region**.

- Select **Customers.Region** as the second column in your query. The “Column Type” for this field remains as “Normal”.

Note that when designing aggregate queries, the first column selected in a query should be the field that you are performing the aggregate on, and the second (and all ensuing) columns represent how that total is to be grouped.

## Sorting Order

You may either leave this tab blank, or (if you wish for the query to list matching regions in alphabetic order of region name), you may select the “Region” field and choose a sorting order of “ascending.”

## Specify the Filter

Similar to the first query, this query will use filters to restrict which records are eligible to be retrieved. The first filter you will configure will exclude any orders that are not associated with a specific region.

Follow these steps:

- Select **Customers.Region** from the list of “Available Columns to Filter.”
- Change the value of “is or is not” to “**is not**”.
- Choose an operator of “null”. (This will exclude any orders for customers that have a blank value in their “region” field.)
- Remove the “?” from the Compare Value field. Since this filter is checking for a “null” value, there is no other compare value.
- Leave the rest of the fields with their default values.

The next two filters will enable this query to retrieve order records that fall within a specific date range. However, these filters will be configured so that their compare values will be filled in on the **event** level (as opposed to on the query level).

This will enable this one query to be used in many different events, each event having its own unique date range that it is selecting records for. Follow these steps for the second filter:

- Select **Orders.OrderDate** from the list of “Available Columns to Filter.”
- Leave the value of “is or is not” as “is”.
- Choose an operator of “greater than or equal to”.
- Leave the Compare Value as a “?”. The question mark is what will allow the value of this filter to be specified on the event level.
- Use your “Tab” key to move beyond the “Type” and “And/Or” fields. You may leave them with their default values.

- In the “Optional Prompt” field (you may need to scroll the Filter window to the right), key in the words “**Order Date Range Begins:**”.

And then follow these steps for the third filter:

- Select **Orders.OrderDate** a *second time* from the list of “Available Columns to Filter.”
- Leave the value of “is or is not” as “is”.
- Choose an operator of “less than or equal to”.
- Leave the Compare Value as a “?”. The question mark is what will allow the value of this filter to be specified on the event level.
- Leave the “Type” and “And/Or” fields with their default values.
- Scroll the Filter listing window to the right, and in the Optional Prompt field, key in the words “**Order Date Range Ends:**”.

Notice how the “order date” field was chosen twice (as two filters) so that an event can retrieve only those orders that fall within a certain date range.

Note also that this query uses two filters on the “order date” field as opposed to using one filter and the “between” operator. This is because in most cases, the use of two filters has been proven to be more efficient (require less system resources) than a single filter using the “between” operator.

## Specify the Sub-Filter

Only aggregate events use sub-filters. A sub-filter is what allows you to perform a test against the aggregate value. Using the current query as an example, a sub-filter is what allows you to retrieve only those regions whose total sales are greater than ‘x’ dollars.

To configure the aggregate sub-filter for this query, follow these steps:

- Select **SUM(Orders.Total)** from the list of “Available Columns to Filter.”
- Leave the value of “is or is not” as “is”.
- Choose an operator of “greater than”.
- Leave the Compare Value as a “?”. The question mark is what will allow the value of this filter to be specified on the event level.
- Leave the “Type” and “And/Or” fields with their default values.
- Scroll the Filter listing window to the right, and in the Optional Prompt field, key in the words “**Regional Total is Greater Than:**”.

## Preview the Results of the Query

Click on the “Preview” tab to review the results of your query. Since this query includes filters whose “compare value” are not defined within the query, you will be prompted to specify the corresponding values.

For the date range prompts, specify a beginning date of “01/01/1990” (do not include the quotation marks), and an ending date of the current date (you can also use the date substitution variable “%Current Date%” from the list shown).

For the regional total threshold, specify “1000” (without the quotations). Your results should yield approximately 16 records.

## Save & Close the Query

Click on the “Save and Close” button at the top-left of your window to save the query you have just created.

## Add the Event

Back on the main Navigator window, go to the “All Events” branch, right-click on the “Sample Application” branch and choose **New Event**.

- Key in a description of:  
  
*Orders; More Than \$100,000 Closed Per Region Last Month*
- Leave the “Lookup Key” field blank.
- Select a priority of “5”.
- Place a checkmark in the “Active” box.
- Since you want to be notified only once when this event is triggered, do not place a check in the “Repeat” box.
- Do place a checkmark in the “Keep only last checked record in Monitor” option.

## Select the Event’s Query

- Click on the “Queries” tab.
- Click on the “Add Query” button.
- Select the query you were just working with.
- The grid at the bottom of this window will prompt you to specify a value for the query’s filters that have a ‘?’ in their compare values. Fill in the answers to these questions as follows:
  - **Order Date Range Begins:** Click in the “Answer” field, and from the list of “Available Substitution Variables” select **{%Last Month Start Date%}**.
  - **Order Date Range Ends:** Click in the “Answer” field, and from the list of “Available Substitution Variables” select **{%Last Month End Date%}**
  - **Regional Total is Greater Than:** Click in the “Answer” field and type in **100000**.

Note that an event must have valid values specified for any event trigger parameters. Since KnowledgeSync is not an interactive application (it runs as a service), it will not prompt a user to specify an event's parameters when the event is run. Any event with blank trigger parameters will fail to run successfully.

## Specify the E-Mail Message Text

- Click on the “E-mail” tab.
- Enter (or verify) the value in the “E-mail Account to Send From” field.
- Leave the E-Mail Reply Address field blank.
- Key in a message subject of:  
  
***Orders; More Than \$100,000 Closed Per Region Last Month***
- For the first line of your e-mail message text, type in the following:  
  
***The following regions yielded more than \$100,000 in sales last month:***
- Press your Enter key to insert a blank line of text.
- In line three of your alert message, type in “Region:”
- In line four of your alert message, type in “Sales Total:”
- Position the cursor to the right of the word “Region:” in your message text. Press your spacebar twice to leave some room after it.
- Go up to the list of “Available values for use in message content” and select (double-click on) the field called “{Region}”.
- Position the cursor to the right of the words “Sales Total:” in your message text. Press your spacebar twice to leave some room after it.
- Go up to the list of “Available values for use in message content” and select (double-click on) the field called “{Total}”.
- Position your cursor after the word “{Total}” and press your Enter key to insert a final blank line at the end of your message.

When a KnowledgeSync event is triggered by multiple matching records (e.g., more than one region with closed sales over \$100,000), you have a choice as to how many alert messages KnowledgeSync will send:

Option #1: It will send one alert message for each matching record

Option #2: It will send one alert message for ALL matching records (i.e., the message will “repeat” the details of each matching record)

Option #3: It will send one alert message per “group” of matching records (e.g., if different regions are owned by different managers, you could have KnowledgeSync send one message per manager – each message containing the regions owned by that manager).

You will configure this event to send a single e-mail message that contains the details of all of the regions that exceeded \$100,000 in sales. (You do not want to receive one e-mail message for each region that exceeded \$100,000 in sales.)

This is referred to as “repeat-enabling” an event.

To repeat enable this event, you need to tell KnowledgeSync which part of the alert message should be “repeated” for each matching record. For this particular event, you wish to “repeat” the last two lines of your alert message (the lines that contain the region name and sales total) for each region that meets the event’s criteria.

- Click in the second line of your alert message text (the blank line).
- Go up to the list of “Available values for use in message content,” scroll to the very end of the list, and select (double-click on) the field called “{BEGIN\*REPEAT}”.
- Click in the last line of your message text (the blank line after the “Sales Total” line).
- Go up to the list of “Available values for use in message content,” scroll to the very end of the list, and select (double-click on) the field called “{END\*REPEAT}”.

You have thus told KnowledgeSync what part of the message to repeat, and so are finished designing the outgoing alert message.

## Specify the Event’s Subscribers

- Click on the “Subscribers” tab.
- Click on the “Add Subscriber” button.
- Click on the plus sign next to “Sales Team”.
- Click on the box that appears to the left of your name.
- Click on “Add Subscriber.”
- Click on the “Email” box to the right of your name to place a checkmark in it.

## Specify the Event’s Schedule

- Click on the “Schedule” tab.
- Choose the schedule called “The 1st of the Month; 9:00 AM.”

## Save & Close the Event

Click on the “Save and Close” button at the top-left of your window to save the event you have just created.

## Verify KnowledgeSync Server Status

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Now that you've got two fully configured KnowledgeSync events, you're ready to check those two events and see if they get triggered.

In order for KnowledgeSync to check events, the KnowledgeSync service (or Desktop Service) must be running.

If you're running KnowledgeSync under Windows NT, XP, 2000, 2003, or Vista, the application's servers will run as a service; if this service is not currently running, go to your system's "Services" option and start it.

You can check to make sure that the KnowledgeSync servers are running by logging into the KnowledgeSync Monitor (default user "Admin", no password), clicking on the "Activity" folder, and then on the "Server Status" folder.

(At minimum, the first four servers should be running.)

## Submit Your Two Events

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Since your two events are scheduled to run at different times (one at 9:00 AM daily, and one at 9:00 AM on the first day of a month), you might wish to submit these two events to run "right now" so that you can track their progress.

To submit your two events to run "right now", follow these steps:

- Beneath the "All Events" branch, expand the "Sample Application" branch so that you can view the events within it. Locate the first event you created.
- Right-click on this event and choose "Schedule This Event Now".
- You will be asked to confirm the submission of your selected event. Click on "Yes."
- The event will be scheduled for immediate execution, and may be tracked in the KnowledgeSync Monitor.
- Repeat these steps for your second event.

## Track Events in the KnowledgeSync Monitor

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The KnowledgeSync Monitor is an excellent place from which to track the status of your events.

Follow these steps to track the progress of your events:

- Double-click on the "Scheduler" folder and then single-click on the "Next Run Date/Times" branch. You will see the events that are due to be submitted.
- Once an event's submission time arrives, proceed to the "Application Events" folder.

- An event will go from a “pending” state to a “checked” state, and then (if the event’s conditions are met), to a “triggered” state. If there is an error in an event’s configuration, the event will appear in the “Errors Today” branch, and will also remain in the “Pending” branch.
- Depending on the number of records that trigger an event, you will see one or more “triggered event” records. To view the text of alert messages associated with the event, point your cursor at the columns that contain the e-mail, fax, pager, or webcast text.

KnowledgeSync will automatically expand the contents of these fields to display the full contents of the outgoing alert message.

- To see details about the delivery of alert messages for an event, highlight (click on) a specific triggered record and click on the “Deliverables” button.
- Note that the “Deliverables” button will show you whom was notified about the event, how they were notified, and when.
- When you are satisfied that your events have executed successfully, you may shutdown the KnowledgeSync service.

## A “Getting Started” Hint

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After you have triggered some events, you might wish to “clear” the KnowledgeSync monitor of its history and “start again.” To do so, follow these steps:

- Shut down the KnowledgeSync service.
- Go to the KnowledgeSync Administrator.
- Go to the “File” menu and select “Database Tools” and then “Remove Completed Items”.
- Specify that you wish to remove all items dated before a certain date. If you wish to remove all history, key in any date in the future.

## You’re On Your Way!

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Congratulations on completing the KnowledgeSync tutorial. There are lots of other functions that you can try in KnowledgeSync, including alternate alert methods (page, fax, file copy, and webcasting), triggering application updates and/or workflow, report distribution (via Crystal Reports), processing incoming e-mail messages, and cross-application alerts (events that are based on conditions that exist in multiple business applications).

If you have any questions while using KnowledgeSync, contact our technical support department via the web ([http://www.vineyardsoft.com/html/email\\_support.html](http://www.vineyardsoft.com/html/email_support.html)) or via phone at 800-850-8055 (within the US) 508-696-6495 (outside the US).

And thank you for using KnowledgeSync!