SAGE KNOWLEDGESYNC
(Professional Edition)

USER'S GUIDE

Welcome to Sage KnowledgeSync!

Thank you for using the **Sage KnowledgeSync Professional Edition** solution. Please note that there are two versions of Sage KnowledgeSync – the Professional Edition and the Enterprise Edition. This guide is designed to be used with the Professional Edition.

If you are looking for documentation on the Enterprise Edition, please download the following document:

http://knowledgesync.com/lit/ks_impl_guide.doc

http://www.vineyardsoft.com/lit/ks_manual.zip

System Requirements

Sage KnowledgeSync must be installed on a server that has ODBC (Open Database Connectivity) access to the Sage Software application you wish to integrate with. Sage KnowledgeSync is installed on only one machine (a server) with the following minimum hardware requirements:

Platform:	MS Windows NT, 2000, 2003, XP, or Vista
Memory::	256 MB (or greater)
Processor:	1.0 GHZ (or greater)
Disk Space:	(For installation) 64 MB
Disk Space:	(For the application) 32 MB

Download the Professional Edition

Go to www.sageknowledgesync.com and click on the Link to download the Professional Edition application to the server on which it will be installed. Note that this Download will install the live Sage KnowledgeSync application; it comes with a 30-day evaluation license code so that you can try out the software before you purchase it.

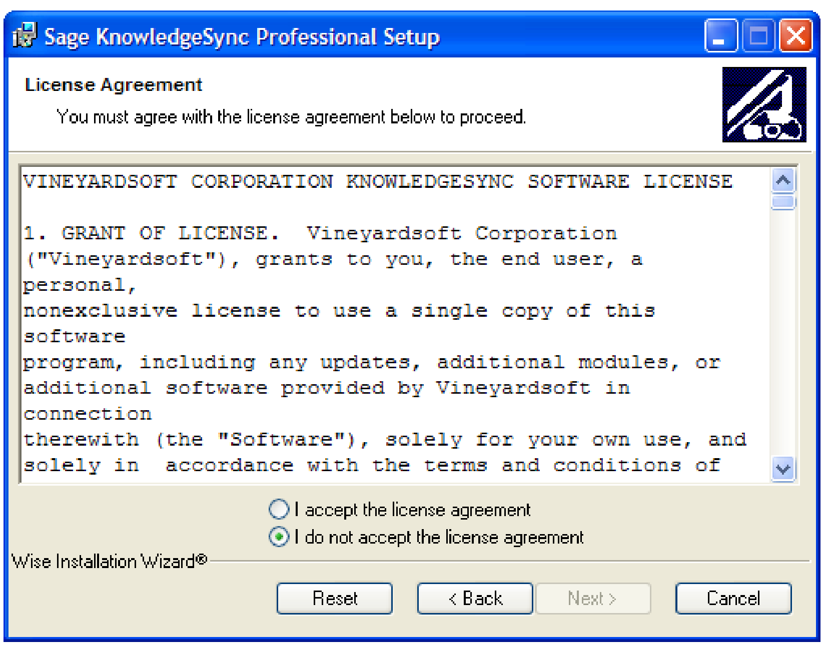
If you choose to purchase the Professional Edition, you will be provided with a license code that will enable you to keep using the application beyond the initial 30-day evaluation period.

Installation

Once you have downloaded the Professional Edition installation file ("SAGE_KS_Setup_V72") execute this file to begin the installation. You will be shown the following window:

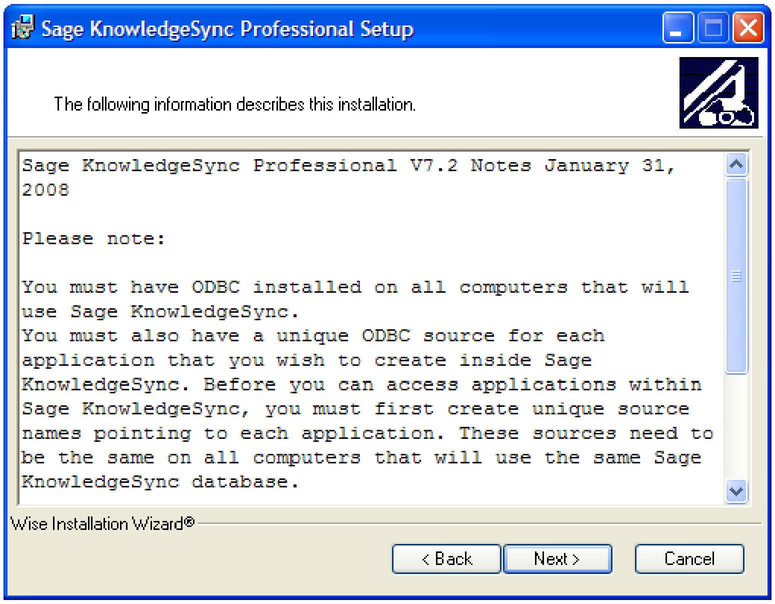
INITIAL INSTALLATION WINDOW

Click on "Next" to continue and you will see the following window:



LICENSE AGREEMENT WINDOW

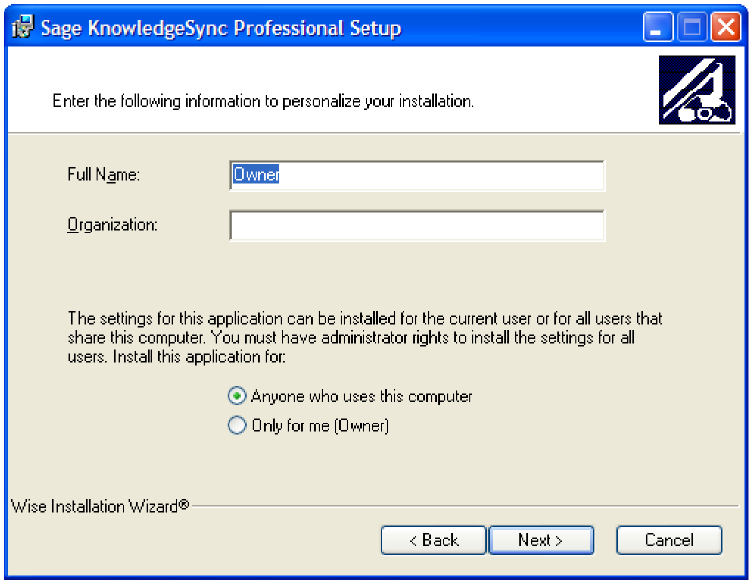
This window presents you with the Sage KnowledgeSync License Agreement. Review the terms of the agreement, click on “**I accept the license agreement**” and then click on the “Next” button to display the following window:



OPEN DATABASE CONNECTIVITY (ODBC) INFORMATION

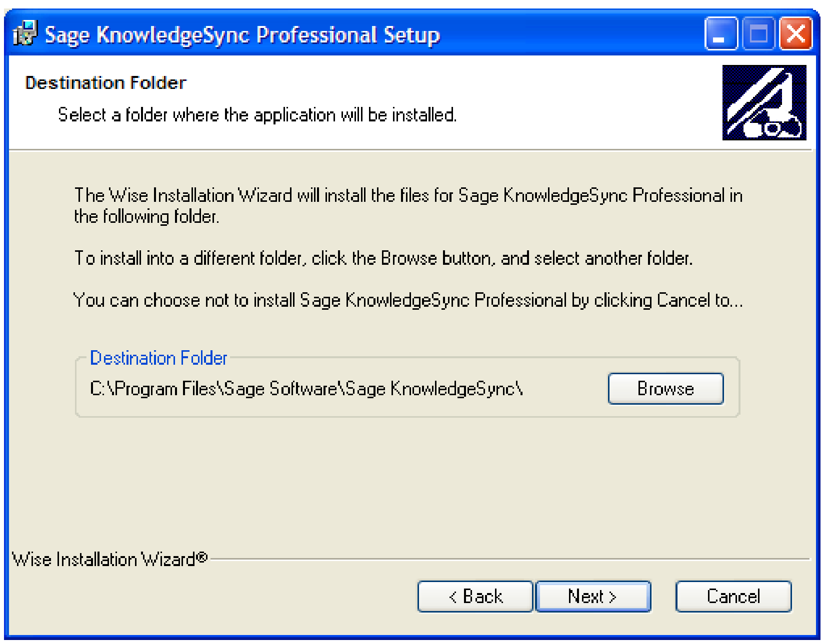
The information in this window lets you know that Sage KnowledgeSync uses ODBC (a standard application integration technology) for integrating with your Sage application. Sage KnowledgeSync requires a system (not user) ODBC source defined to the location of your Sage application database. If one does not already exist, you will have the opportunity to create it at the end of the installation.

The next window allows you to specify your name and organization name, along with specifying who has access to the Sage KnowledgeSync application. (Note that additional user access settings are configured within the KnowledgeSync application.)



INSTALLATION PERSONALIZATION SETTINGS

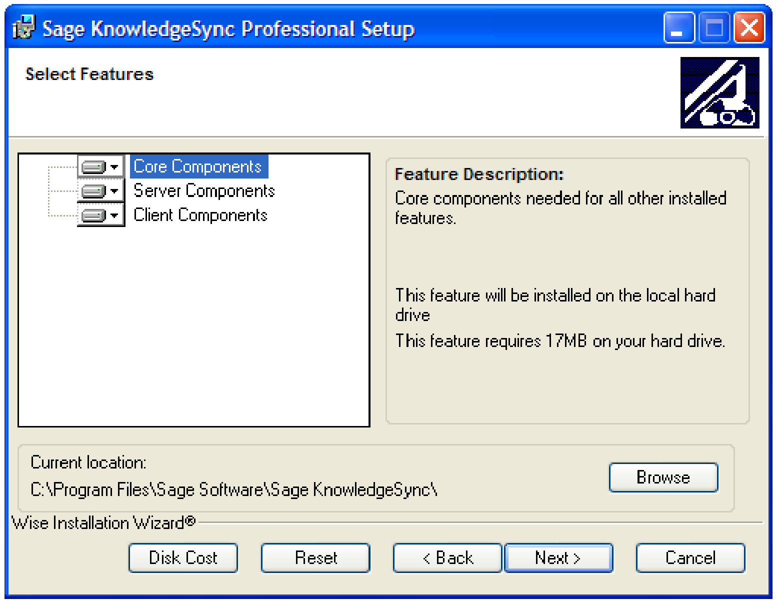
Fill in this information and click on "Next".



INSTALLATION LOCATION

Specify where you would like KnowledgeSync to be installed. Use the "Browse" button if you would like to install KnowledgeSync in a location other than the default.

Click "Next" to move on to the following window:

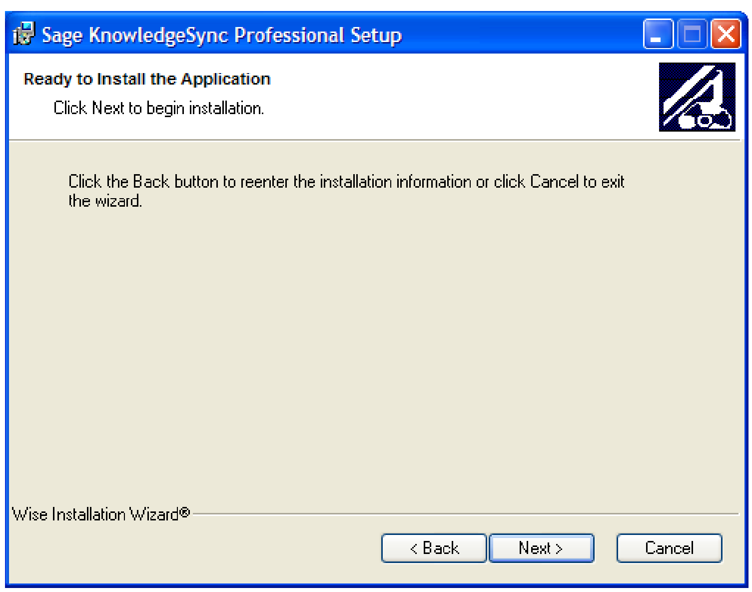


INSTALLATION COMPONENTS

By default, the Professional Edition installs all three components of Sage KnowledgeSync and this is the recommended configuration.

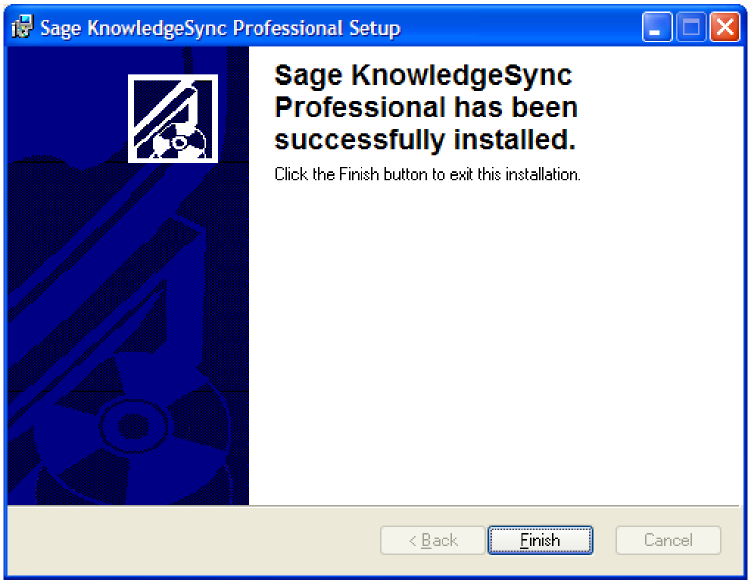
(The only time you should consider not installing all three components is if you wish to install the KnowledgeSync "core" and "server" components on one machine, and the "client" components on one or more other machines.)

Click on "Next" to begin the installation:



BEGIN INSTALLATION

Click on the "Next" button and the remainder of the KnowledgeSync installation will proceed until finished. The installation will take approximately one minute to complete, at which time you will be shown the following window:

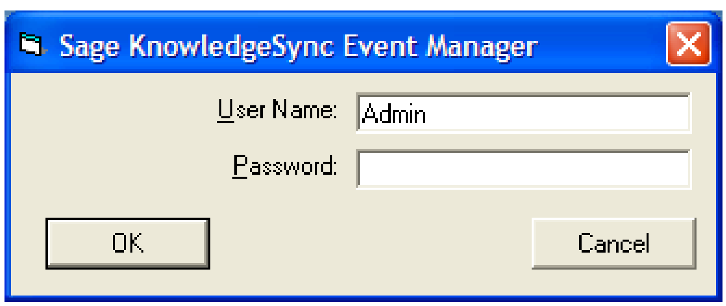


INSTALLATION COMPLETION MESSAGE

Click on "Finish" and you can now proceed with connecting Sage KnowledgeSync to your specific Sage application.

Initial Configuration

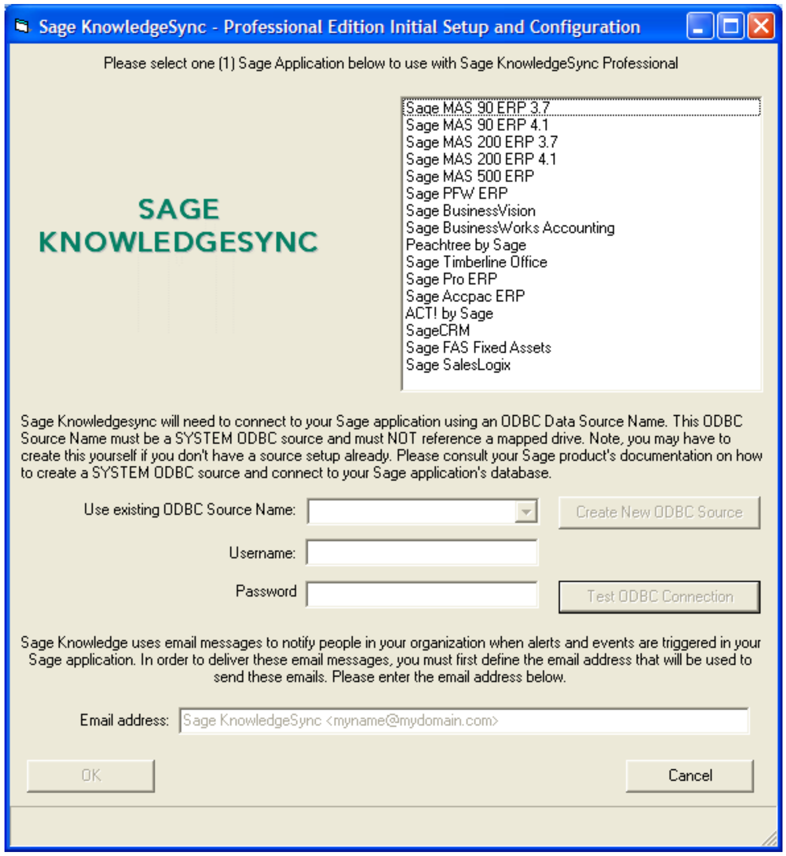
Go to your "Sage Software - Sage KnowledgeSync" Programs Group and select the "Navigator" option. The following log-on window will appear:



KNOWLEDGESYNC LOG-ON WINDOW

By default, KnowledgeSync is shipped with a username of "Admin" and no password. (You can add to or change user authorizations in the "Administrator" module.)

Click on the "OK" button and you will be brought to the following window:



Sage KnowledgeSync First-Time Log-On Window

Please refer to the following sections for details on filling out the information in this window.

Choose Your Sage Application

Your first step is to select the Sage Software application that you will be using the Professional Edition with. Note that you can select only one (1) application. (If you wish to use KnowledgeSync with multiple Sage applications, you will need to install the Enterprise Edition of Sage KnowledgeSync).

- Single-click on the Sage Software application you will be using with the Professional Edition.

Select Your ODBC Source

Your next step is to choose the ODBC source that points at the location of your Sage Software application. Click on the List button to display currently-defined ODBC sources. If the source you require does not currently exist, click on the “Create New ODBC Source” button to go into the option to create ODBC sources.

Note: Your ODBC source must **not** reference mapped drives. Please be sure to use UNC formatting when specifying the location of your Sage application.

If your ODBC source requires a username and/or password, enter that information here and then click on the "Test ODBC Connection" button to confirm that your ODBC source can successfully access your Sage application database. (The test's results will be displayed in the lower left-hand corner of this window.)

Specify Your Email Alert Account

The last step in this window is to specify the email address of the account that Sage KnowledgeSync will send alerts from.

By default, the Professional Edition includes an embedded SMTP (Internet) email engine; all you need to do is to specify a valid email address within your organization's domain that you'd like to have the alerts sent from.

Note that you can also change the name of the email alerts account from "Sage KnowledgeSync" to anything that you prefer.

Click on the "OK" button.

Note for MAS 90 / MAS 200 Providex Clients

If you are using Sage KnowledgeSync with the Providex database versions of either MAS 90 or MAS 200, Sage KnowledgeSync will run an extra "Optimization Module" to facilitate the processing of the MAS application data.

You will notice some messages that appear at the bottom-left of the preceding window as KnowledgeSync goes through this optimization process. This process may take a couple of minutes, but – when finished – will present you with the main Navigator window as detailed in the following sections.

License Code Entry (If Purchased)

If you have purchased the Sage KnowledgeSync Professional Edition, your license code will have been sent to you via email. If you are evaluating the Professional Edition, you may skip this section, as the application comes with a 30-day evaluation license code.

If you have received a perpetual license code, follow these steps to enter it into the Professional Edition:

- With the Navigator module open, click on the "Help" menu and choose "About Sage KnowledgeSync".
- Click on the "License" button. Cut-and-paste the license values from your email message into the License Code Entry window and click on "OK".

Note that in the Professional Edition, your license code expires annually; you will receive a new license code upon renewing your annual Maintenance and Support contract for the Professional Edition.

If You Are Evaluating . . .

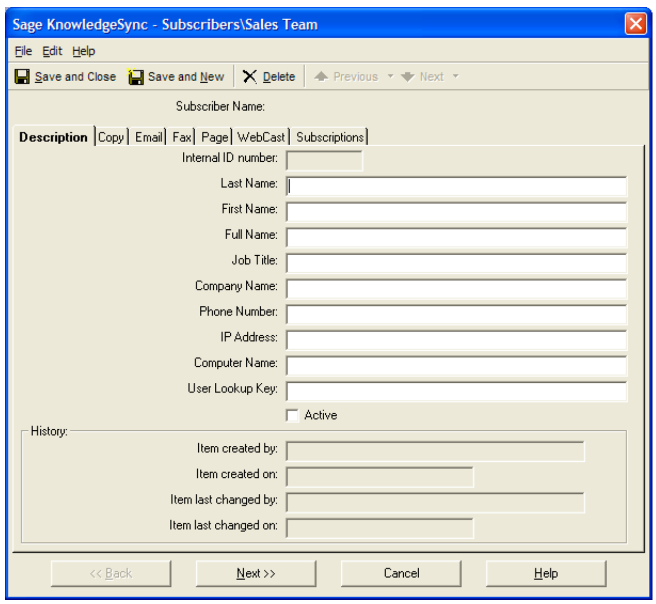
If you are evaluating Sage KnowledgeSync, follow these initial steps to show how KnowledgeSync can deliver an email alert message about a critical condition within your Sage application database.

Define Yourself as an Alert Recipient

The first step is to add yourself to KnowledgeSync as a potential alert recipient (called a “subscriber” in KnowledgeSync).

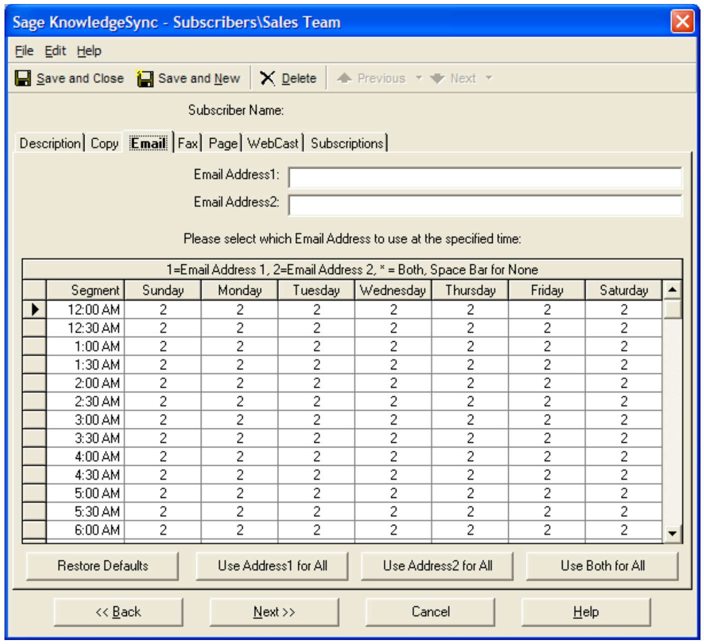
In the Navigator, expand the “Subscribers” branch, locate the “Sales Team”, right-click on that group and select “New User”.

You will see the following window:



SUBSCRIBER DEFINITION

- Fill in the your last, first, and full name, company, and title. Click on the “Active” checkbox.
- Click on the “Email” tab. You will see the following window:



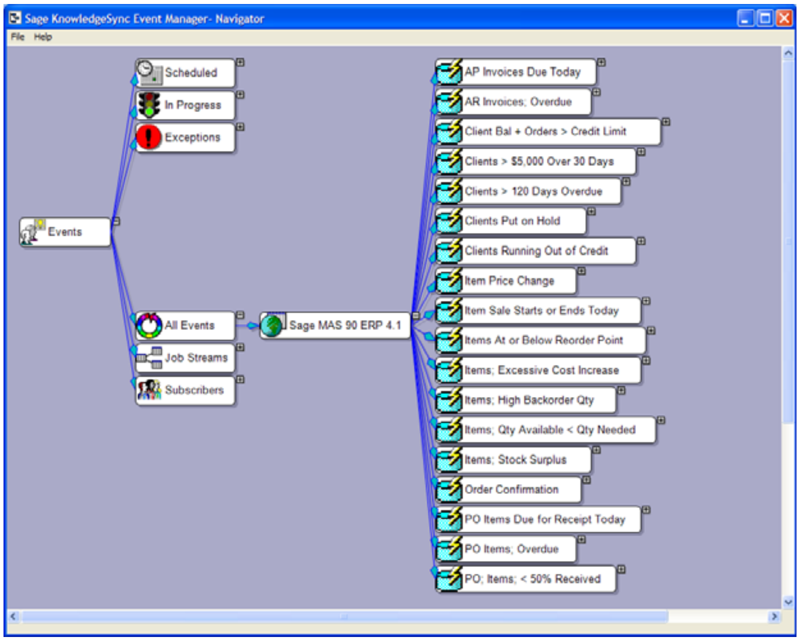
SUBSCRIBER "E-MAIL" TAB

- Enter your email address in both the "Address 1" and "Address 2" fields.
- Click on "Save and Close" at the top-left of this window.

Select an Event to be Notified About

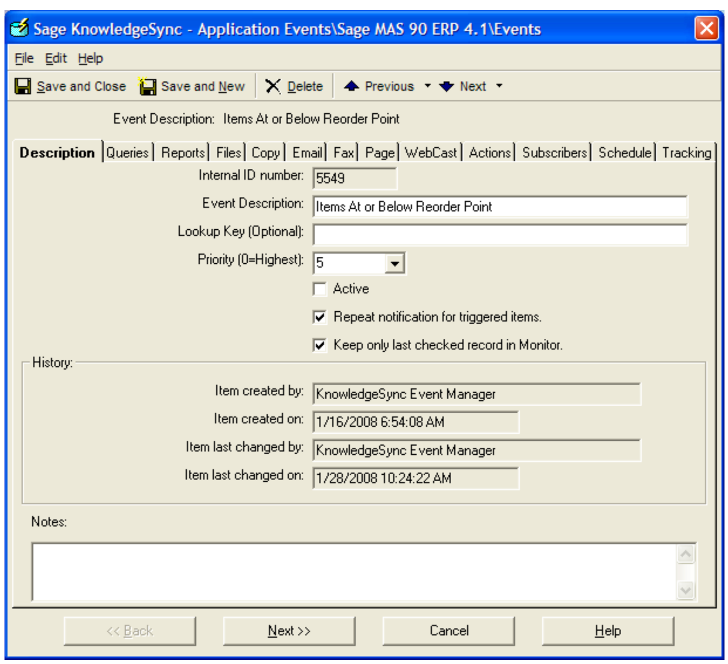
The next step is to choose an event that you wish to be notified about. Follow these steps:

- Close the "Subscribers" branch of the Navigator so you no longer see the subscriber group names.
- Expand the "All Events" branch so you can see the name of the Sage application you are monitoring with KnowledgeSync.
- Expand the Sage application branch. Your window should look like the following:



SAGE MAS 90 EVENT LISTING

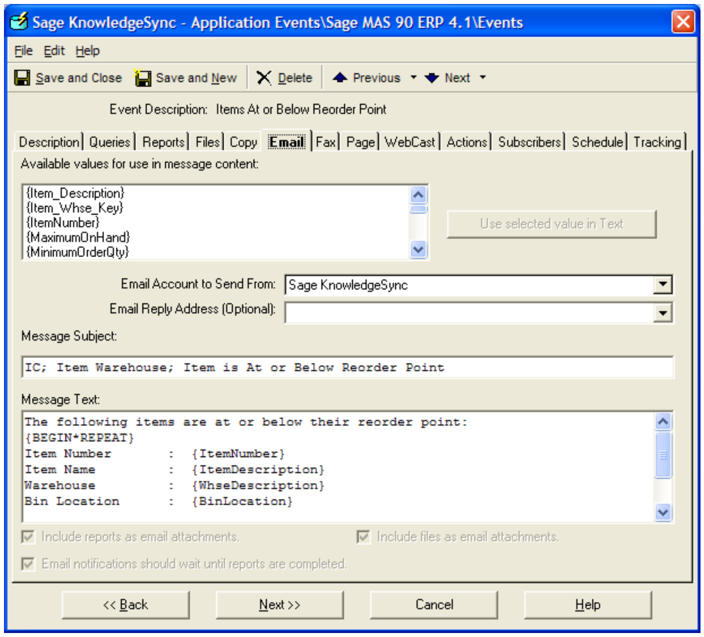
- Select an event that – based upon the data in your Sage application – you think there will be matching records. (E.g., if you know that you have items that are below their re-order level, choose the event called "Items at or Below Reorder Point".)
- Right-click on your selected event and choose "Edit Event". The following window will appear:



EVENT CONFIGURATION DETAILS

Review the Event's Alert Configuration

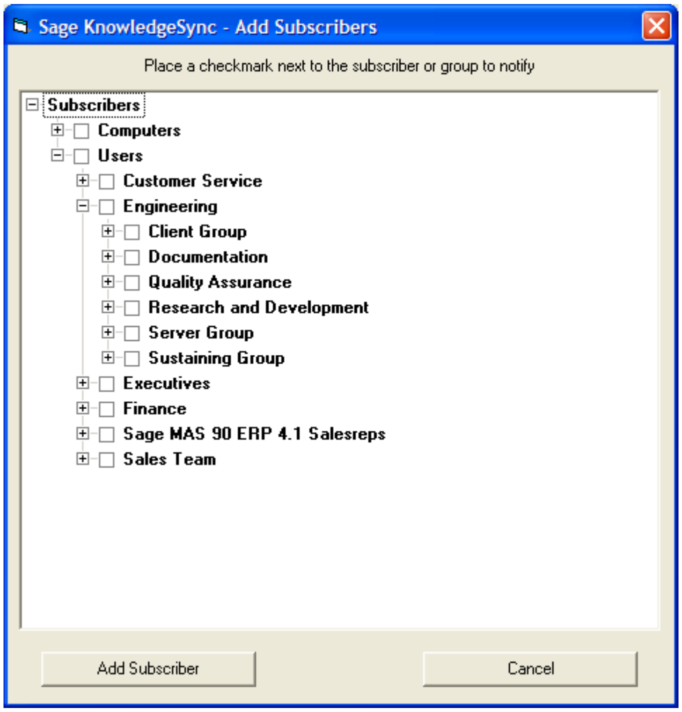
Click on the "Email" tab to see what the alert message will look like:



EVENT ALERT MESSAGE CONFIGURATION

Subscribe to the Event

Click on the "Subscribers" tab and click on the "Add Subscriber" button. The following window will appear:



EVENT SUBSCRIBER CONFIGURATION

- Expand the "Sales Team" group and put a checkmark next to your name.
- Click on the "Add Subscriber" button and then click on "Save and Close" at the top-left of your window.

You are now ready to run this event and send yourself an alert.

Run the Event

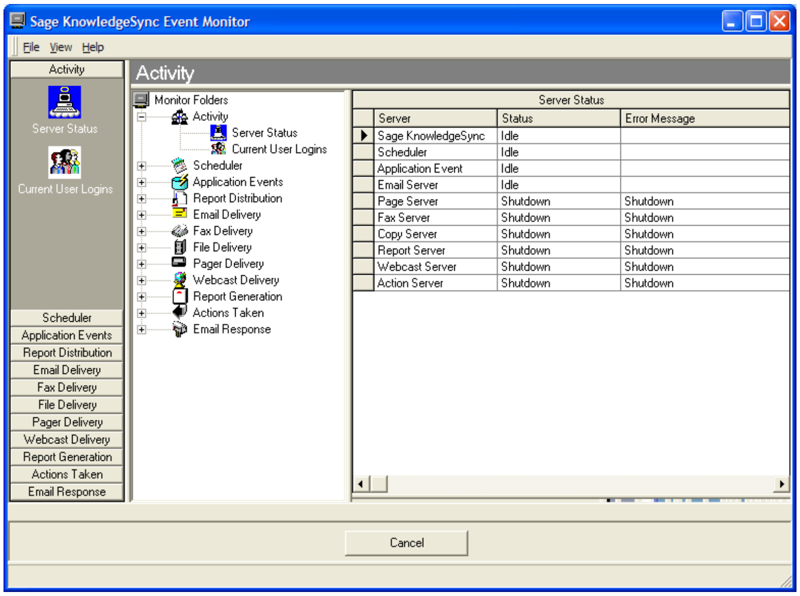
In a normal KnowledgeSync environment, each event is scheduled to check for its conditions on a periodic basis, such as every 30 minutes, hourly, every Monday at 9 AM, and so on.

But since we want the event to run right now, follow these steps:

- Right-click on the event you just subscribed to and choose "Schedule This Event Now". This option will run this event once – right away.
- Click on "Yes" to confirm that you wish to run the event right now.

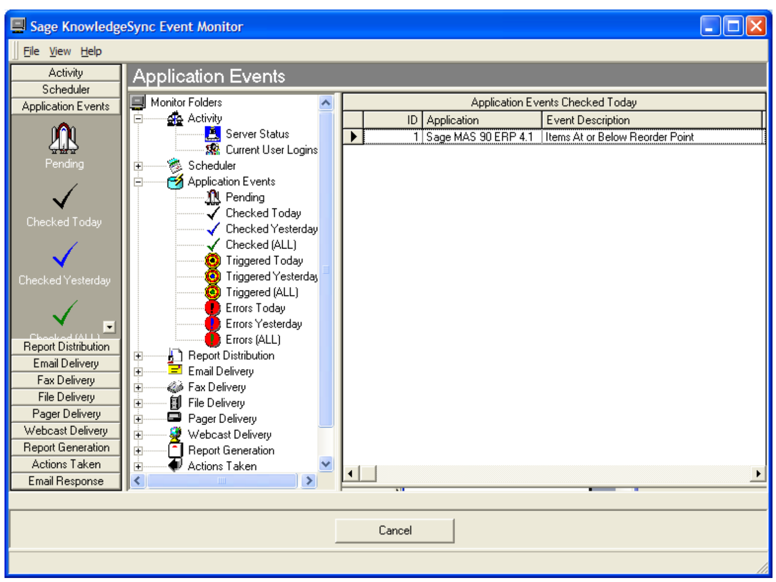
Monitor the Event's Execution

Go to your "Sage Software - Sage KnowledgeSync" Programs Group and select the "Monitor" option. The following window will appear:



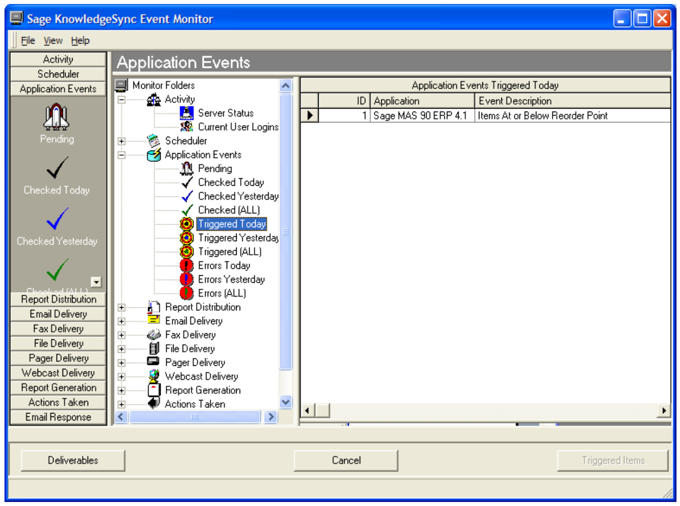
KNOWLEDGESYNC MONITOR WINDOW

- Expand the branch called “Application Events”.
- Click in the “Checked Today” branch. You should see that the event was successfully checked, as shown in the following illustration:



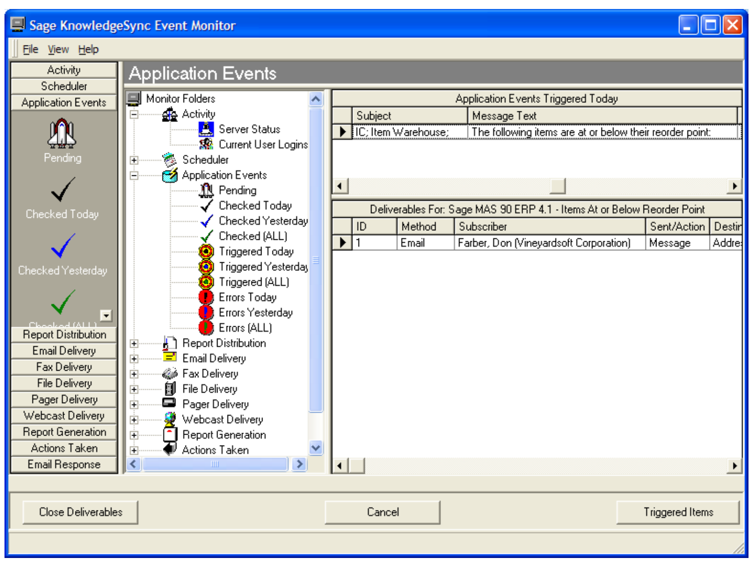
KNOWLEDGESYNC “CHECKED” EVENT

- Next, click in the “Triggered Today” branch. If the event found matching conditions in your Sage application database, you should see that the event was triggered, as shown in the following illustration:



KNOWLEDGESYNC "TRIGGERED" EVENT

- From here, you can scroll the right-hand window to the right to display the text of the alert message (scroll until you see a column called "Message Text" and then point your cursor at that field to pop up the alert message details) and you can click on the "Deliverables" button (at the bottom-left) to see who the alert was sent to, when it was delivered, and so on:



KNOWLEDGESYNC EVENT "DELIVERABLES"

And you should now check your own email account, as there should be an alert message waiting for you, delivered by KnowledgeSync.

KnowledgeSync Users Guide

The remainder of this guide details all the components of the Sage KnowledgeSync solution. If you have any questions or require any assistance, please contact Vineyardsoft Corporation or look through the on-line KnowledgeSync knowledgebase.

Note that the remainder of this guide addresses all of the KnowledgeSync options that are available in the Professional Edition. Those options that are not available in the Professional Edition (but are available in the Enterprise Edition) will appear within the Professional Edition software, but will not be able to be activated

Those options that are available in only the Enterprise Edition will not be detailed within this guide.

Alert Recipients (Subscribers)

Before you begin adding or configuring events, you should begin by defining your alert recipients – also called “subscribers”.

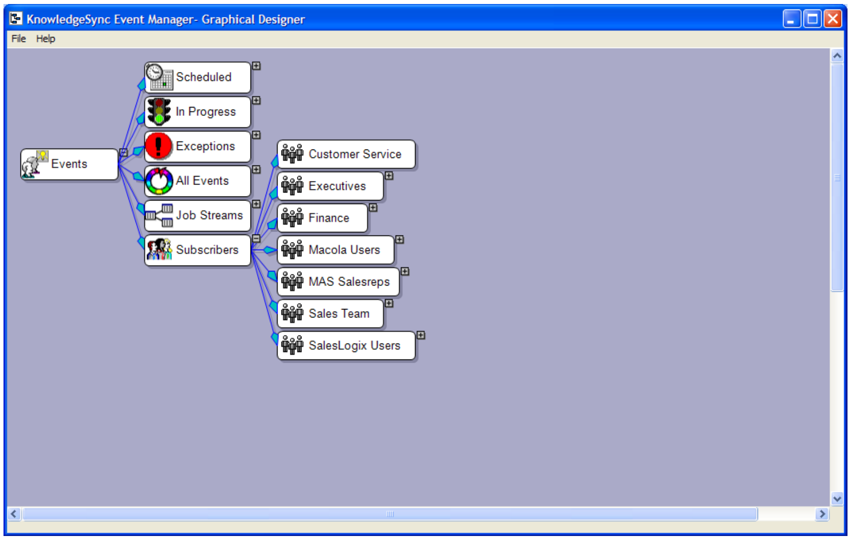
Events can be configured to send an alert to:

- A pre-determined set of people (e.g., an event that identifies overdue receivables might always sends its alert to your CFO).
- People related to the condition that occurred (e.g., an event that identifies new orders might send its message to the customer for whom the order was placed).

No set-up is required for the second type of recipient; but you do need to configure “subscriber profiles” for the first type of recipient; this should be done before you start working with your events.

Event Subscribers

Event subscribers are stored in “groups”. To see a list of all currently-defined Subscriber Groups, expand the Subscribers branch as follows:



SUBSCRIBER GROUPS

Each event can be configured to notify individual subscribers or everyone within certain subscriber groups. Although you can add subscribers to the pre-configured groups that come with KnowledgeSync, you can also create additional groups of your own.

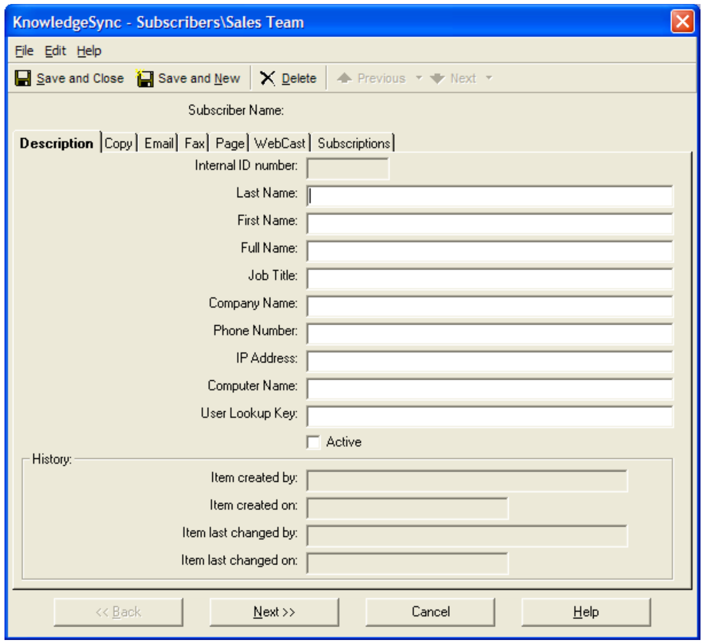
To add a subscriber group, right-click on the "Subscribers" branch, select "New User Subscriber Group", key in the name of the new group and click on "OK".

To change the name of a subscriber group, display the group whose name you wish to change, right-click and select "Properties", change the group's name and click on "OK".

Adding a Subscriber

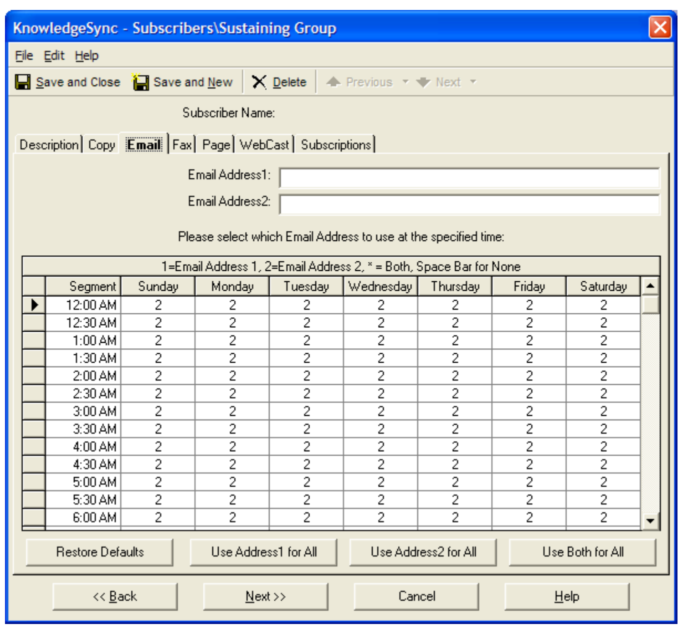
To add a subscriber, expand the "Subscribers" branch, locate the group to which you wish to add the subscriber, and right-click on that group and select "New User".

You will see the following window:



SUBSCRIBER DEFINITION

- Fill in the user’s name, company, title, and related information. If this person can receive alerts, click on the “Active” checkbox. Make sure the “Full Name” field has a value, as this is used when subscribers are listed in the application.
- Click on the “Email” tab. You will see the following window:



SUBSCRIBER “E-MAIL” TAB

- Key in the subscriber’s email addresses.

  Note that if you enter a primary delivery address and press your tab key, the primary address will automatically be copied into the secondary address field.

The grid in this tab is where you can specify which address (primary, secondary, both, or none) will be used based upon the time of day and day of the week when an alert occurs. Notice that the grid scrolls down to display times after 6 AM.

The number ‘1’ indicates the primary address, ‘2’ is the secondary address, an asterisk will alert both addresses, and a blank will cause no alert to be sent.

- Click on “Save and Close” at the top-left of this window.

(Please note that Email is the only alert delivery method in the Professional Edition; other alert delivery methods are allowed in Sage KnowledgeSync Enterprise Edition.)

The “Subscriptions” Tab

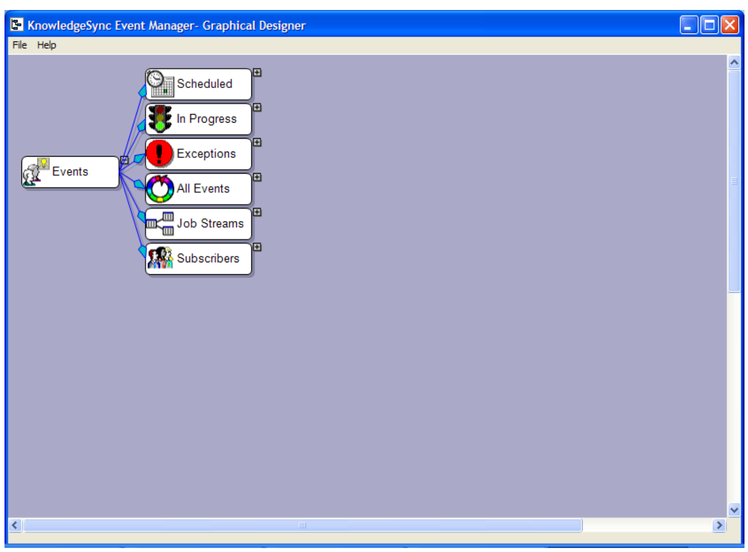
The “Subscriptions” tab is an informational listing of all the events that this subscriber is currently signed-up to receive alerts about.

Deleting Subscribers

To delete a subscriber, go to the subscriber you wish to delete and click on the “Delete” button at the top of your window.

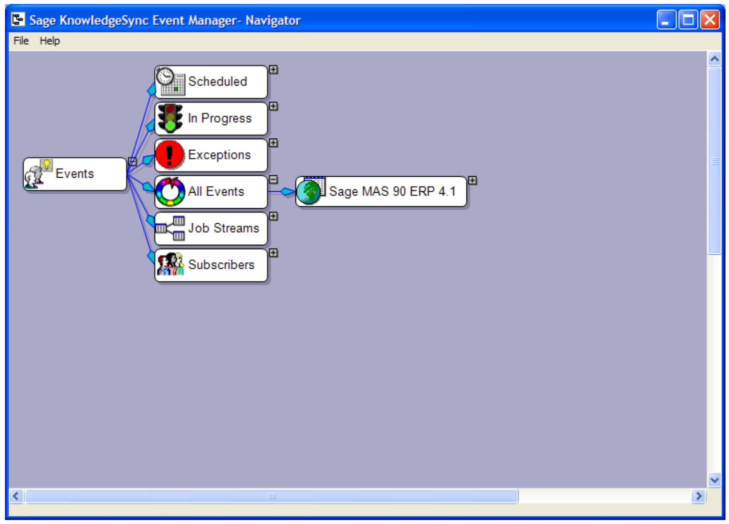
Adding & Editing Events

To add or edit an event, open the KnowledgeSync Navigator module. You will see the following window:



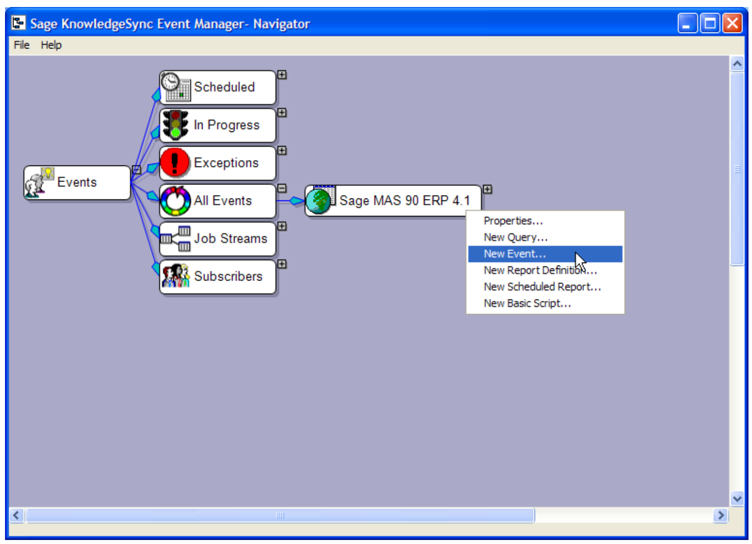
KNOWLEDGESYNC NAVIGATOR

Expand the “All Events” branch and the Navigator will show you the application that KnowledgeSync is currently configured to monitor, as follows:



INTEGRATED APPLICATION

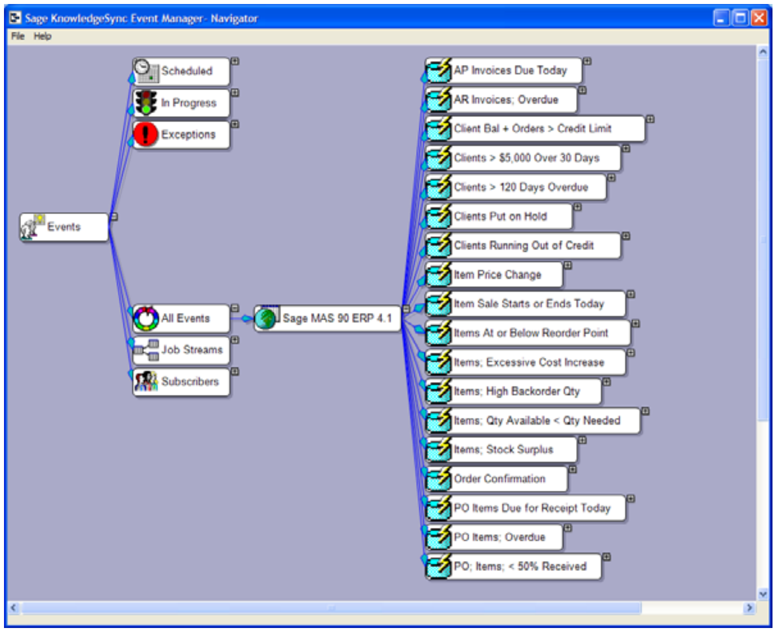
To add a new event, right-click on the Application name and choose "New Event" as shown below:



TO ADD A NEW EVENT

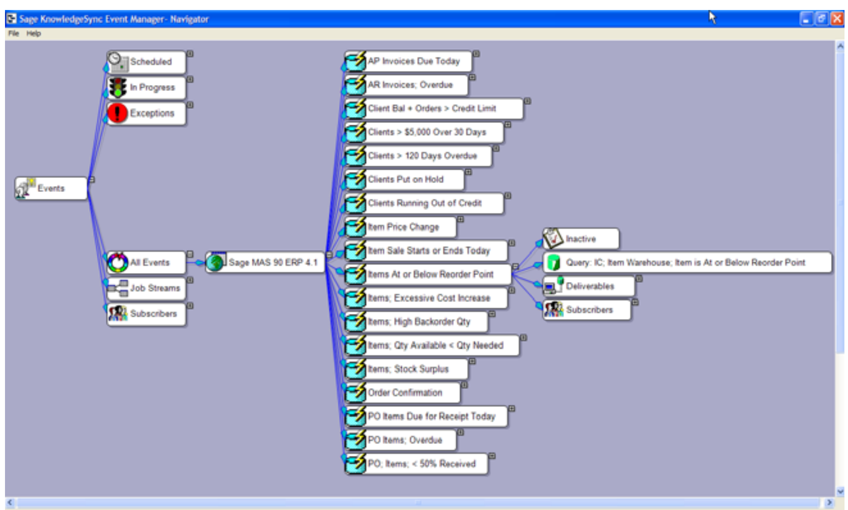
This will bring you to the **Description** tab of the Event Design Wizard. Fill out this tab, followed by the **Queries**, **Files**, **Email**, **Subscribers**, and **Schedule** tabs. (Each of which is detailed in the following sections.)

If you wish to work with an existing event, expand the application that contains the event, as follows:



LISTING OF APPLICATION EVENTS

And, to view the configuration of an event (such as its alert message or alert recipients), you would expand that event as follows:



EVENT COMPONENTS

Event Designing

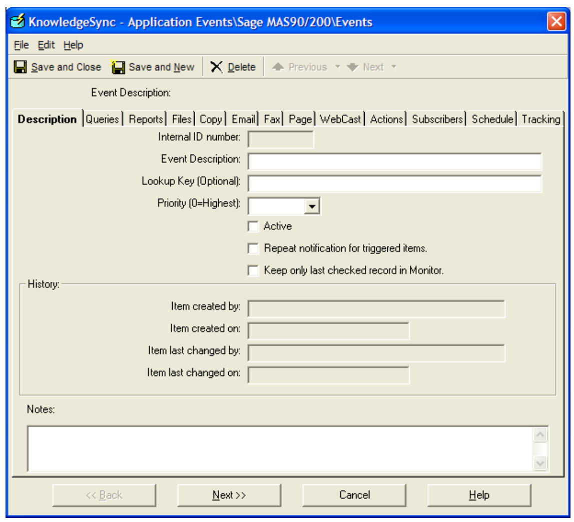
The following pages detail the 6 main event components; each component corresponds to a tab in the Event Design module.

If you are designing a new event, go through the following pages in sequential order; they start with the **Description** tab and end with the **Schedule** tab.

If you are working with an existing event, look through the following pages for the event component or function that you wish to work with. Although the following sections are arranged primarily according to the name of the tab in the Event Designer, within each of those "tab" sections are sub-sections that are named according to the event function that you wish to work with.

Also – you will see the words "***View / Edit***" and "***Add***" at the start of each sub-section. This tells you how – using the Navigator module – you can view, edit, or add the corresponding event component within an existing event.

Description Tab



EVENT "DESCRIPTION" TAB

Event Name & Priority

View / Edit / Add : *Double-click on the Event Name*

Event Description : Key in an informative description of the purpose of the event.
Lookup Key : Leave blank (not used in the Professional Edition)
Priority : Suggested setting is '5'

The "Priority" field controls the order of event execution if you have multiple events scheduled to run at the same time of day. '0' is highest; '9' is lowest.

Enable/Disable an Event

View / Edit / Add : *Double-click on the Event Name*

Active : Controls whether the event is eligible to run

If checked, event is eligible to run; if not checked, event will not run unless submitted manually.

Repeat Vs. One-Time Alerts

View / Edit / Add : *Double-click on the Event Name*

Repeat Notifications : Controls whether the event triggers once or repeatedly

Consider an event that checks for an inventory item that has dropped below its reorder level; the event runs every day at 9 AM.

Monday at 9 AM the event runs, finds item #123 is below is reorder level, and an alert is sent. When the event next runs – on Tuesday at 9 AM – do you want the event to trigger another alert message?

If your answer is "yes" – check the "Repeat Notifications" box; if you want to receive only a single alert when a record meets certain criteria, leave this box unchecked. (A typical event that would not "repeat notifications" is an order confirmation – once you send a confirmation about an order, you do not need to send it again.

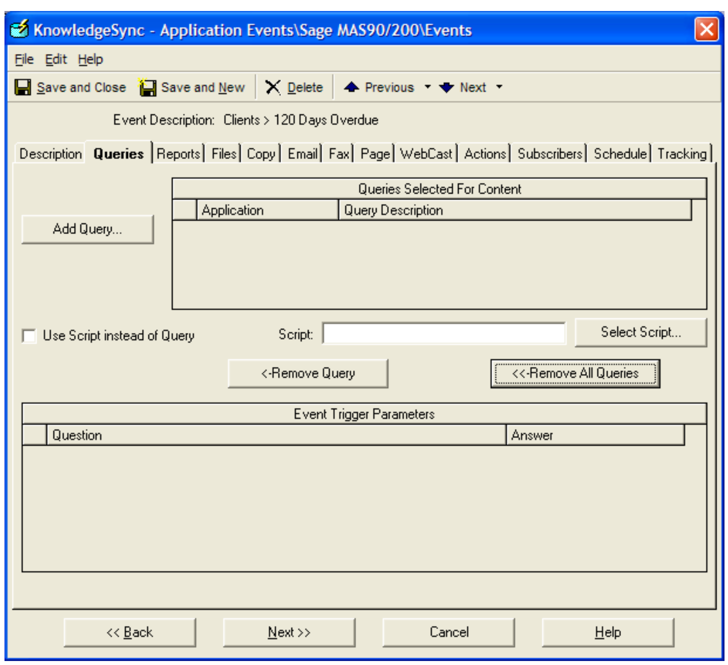
Tracking When an Event Has Run

View / Edit / Add : *Double-click on the Event Name*

Keep Last Checked : Controls auditing of past event runs

By default, "Keep only last checked record" field is checked on. This tells KnowledgeSync to store the date and time of only the last time the event was run. KnowledgeSync will also default to storing 30 days of history of triggered events.

Queries Tab



EVENT "QUERIES" TAB

In order for an event to determine if its conditions are met, it executes a query. The “Queries” tab is where you specify which query an event will use:

The EventPak that you installed with KnowledgeSync contains an extensive list of pre-configured queries; to view this list, click on the “Add Query” button. Note that you cannot create or modify queries in the Professional Edition.

There are two types of queries that can be used in KnowledgeSync events:

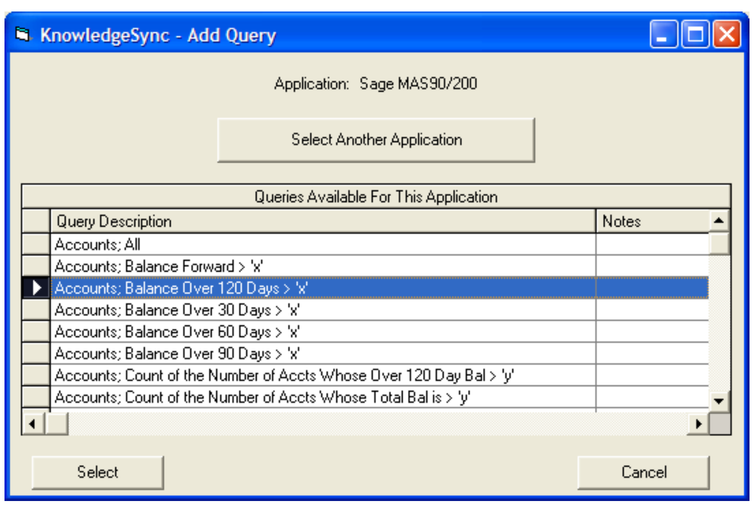
- Hard-Coded Query. A “hard-coded” query is one whose conditions have been pre-defined and cannot be modified. A query that retrieves “today’s orders” or “items below reorder level” are hard-coded query examples. These queries will have no “Event Trigger Parameters” at the bottom of this tab.
- Parameter-Driven Query. A “parameter-driven” query is one that may have some pre-defined conditions but also allows you to further define or restrict its criteria. A query that retrieves “90 day receivables > ‘x’ dollars” or “invoices due within ‘x’ days” are examples of this.

  Parameter-driven queries will display their parameters – and allow you to specify your particular criteria or thresholds – at the bottom of this tab.

Identifying an Event’s “Triggering Conditions”

View / Edit : *Expand event; double-click on the ‘Query’ branch*
Add : *Double-click on event name; go to ‘Queries’ tab*

To choose a query for an event, click on the “Add Query” button:



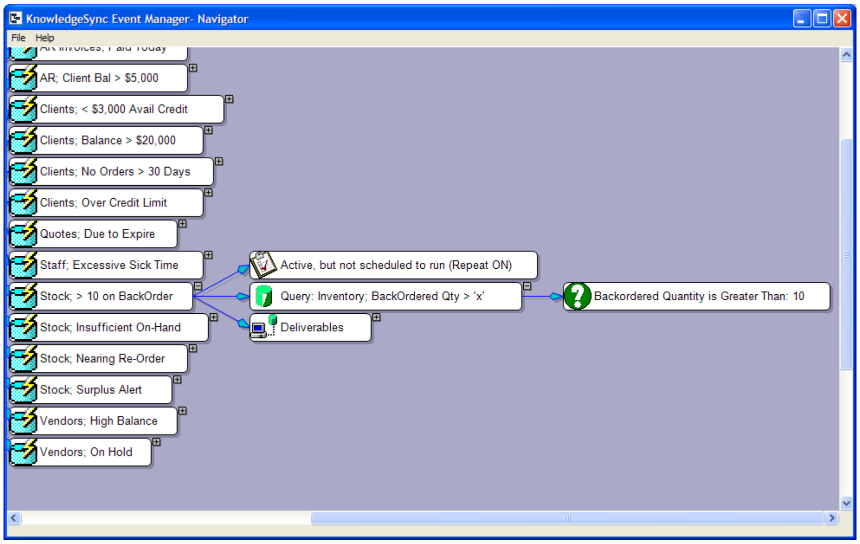
LIST OF AVAILABLE QUERIES

Choose the query to use with the event. If the selected query has no “trigger parameters”, you are done with the Queries tab; if the query does have trigger parameters, you will see them at the bottom of the Queries tab and may proceed by filling in the parameters with the specific values you want the event to check for. (See following section.)

(You may ignore the checkbox titled “Use Script instead of Query” as KnowledgeSync Professional Edition does not allow the use of VB Scripts.)

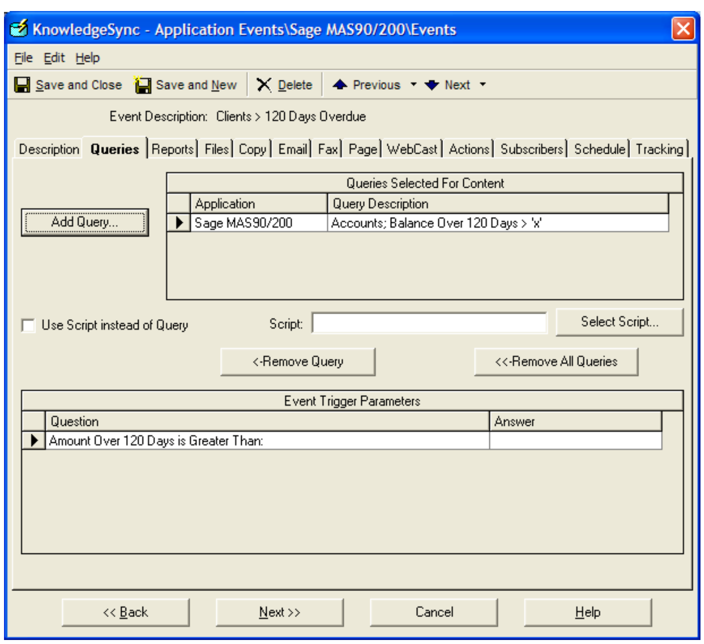
Event Trigger Parameters

If a query has trigger parameters, the Navigator will indicate this by showing a plus sign next to the ‘Query’ branch as shown below:



EVENT TRIGGER PARAMETER AS SHOWN IN NAVIGATOR

Parameters are also shown at the bottom of the Queries tab as follows:

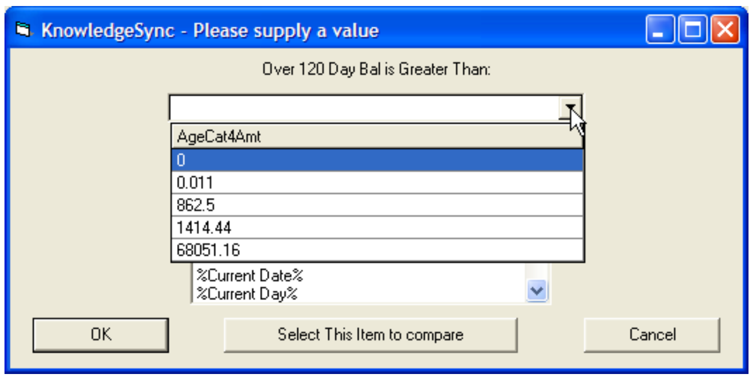


EVENT TRIGGER PARAMETERS IN QUERIES TAB

An event will not run successfully if any of its parameters are left blank.

Trigger parameters are answered by supplying the specific value or threshold that you want the event to check for. In the preceding illustration, you could answer the parameter with '1000' if you wanted the event to identify any clients who had more than $1,000 in invoices that were more than 120 days old.

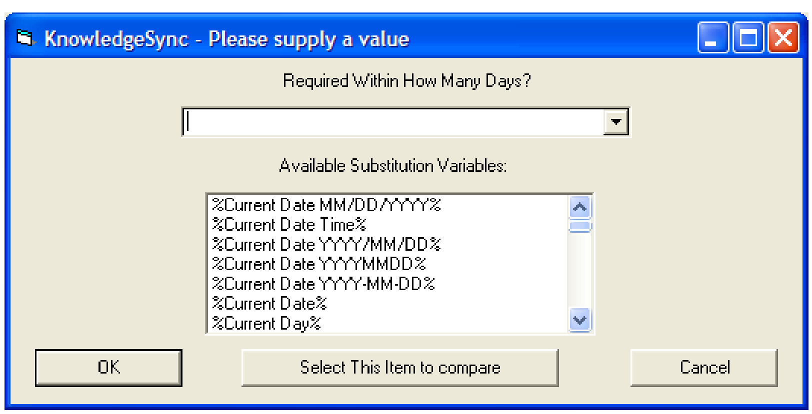
If you don't know how to answer a parameter, you can click in the "Answer" field (at which point a list button will appear), and then click on that button to get a list of values that have been used in that field, as shown below:



PARAMETER FIELD – VALUE LISTING

If a parameter field is asking for a date value, you can either enter a specific value (such as '5/15/2008') or you can use a "date substitution variable". A date substitution variable refers to a specific date – by <u>name</u> – such as "current date", "last Monday date", "next Friday date", and "current month end date". This enables you to configure an event once, and always have the appropriate date values used within the event.

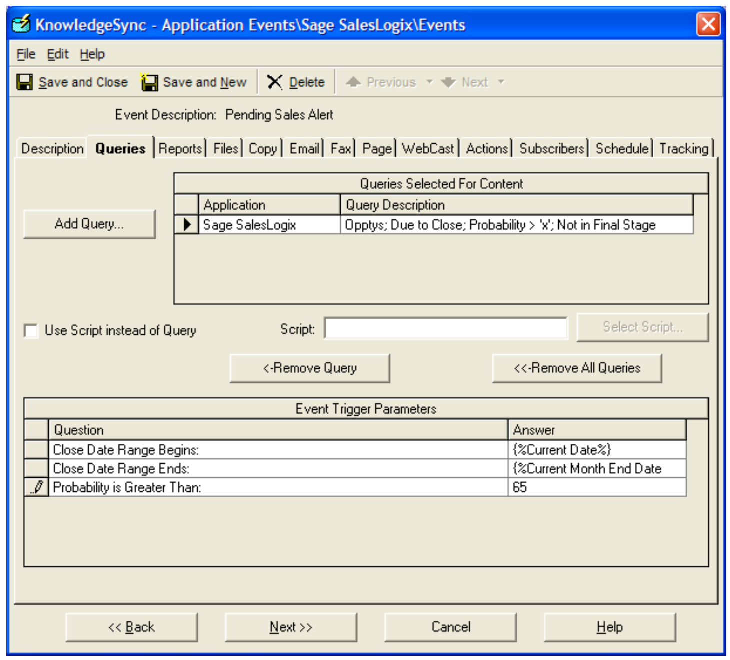
To use a date substitution variable, click on the list button in the "Answer" field and you'll see the following list:



DATE SUBSTITUTION VARIABLES

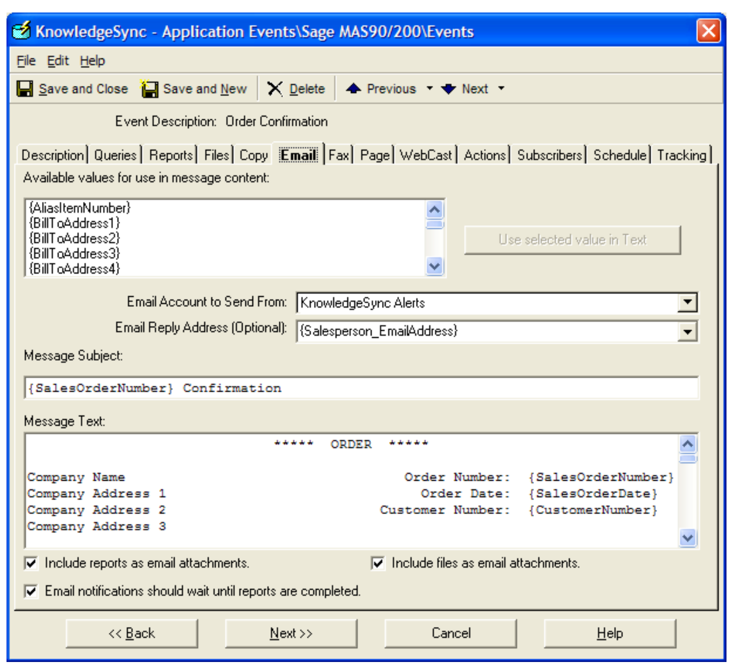
Note that these variables come in different formats – yyyy/mm/dd, yyyy-mm-dd, and so on. The variable with no format next to it ('%Current Date%') uses the KnowledgeSync server's regional date format (e.g., mm/dd/yyyy for the U.S.).

Here is an example of an event that uses date substitution variables:



AN EVENT WITH DATE SUBSTITUTION VARIABLES

Email Tab



Email Alert Message

View / Edit : *Expand event; expand Deliverables; double-click on the 'Email' branch*
Add : *Double-click on event name; go to 'Email' tab*

The "Email" tab is where you configure the content and design of the email alert message that is sent when the event is triggered (i.e., has its conditions met):

The top of the tab lists "Available Values for Use in Message Content" which are data fields that you can use in your alert message. (You can also use date substitution values.)

Account to Send From : This field must be filled in with the name of the KnowledgeSync email account from which these alerts will be sent. (This account is auto-configured when you install the KnowledgeSync application.)

Reply Address : This field is used only if you think that a recipient of this alert might wish to reply to it. If so, you can either specify a value (e.g., support@acme.com) or you can click on the list button and see if a "dynamic reply address" is available.

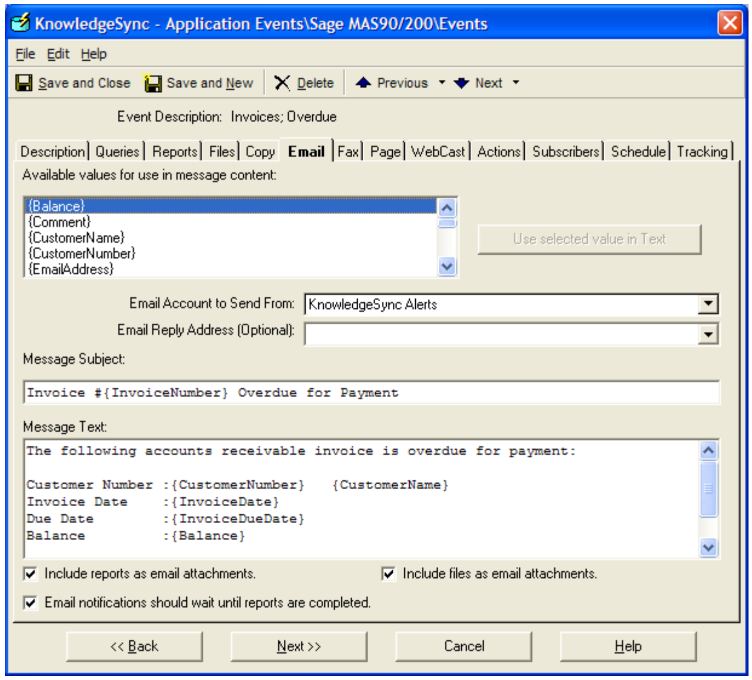
(A dynamic reply address is an address such as "salesrep_email" – and if an alert gets delivered to a client and they reply, the reply would go back to their salesperson.)

Message Subject : This field can contain any combination of hard-coded text and data field values.

Email Message Text

The email alert message may be formatted in either plain text or HTML; the total size of the message cannot be larger than 32k.

When creating a message in plain text, position your cursor in the Message Text field; you can type hard-coded text as well as go up to the list of "Available Values" and select data fields for your alert message. A typical alert message about overdue invoices would look like the following:



ALERT MESSAGE ABOUT OVERDUE INVOICES

Field Formatting Options

KnowledgeSync includes a number of special field formatting functions that you can use when designing your alert messages.

Text Length: Append a colon, the desired length of the field, and the plus sign. (Note that the '+' sign will "pad" the field so that 25 characters is always allocated to this field.)
Example: **{Item_Description:25+}**

Number Length: Append a colon and the desired length of the field.
Example: **{Units_Ordered:7}**

Numbers; Right-Justified; two decimal places: Append a colon, the desired length of the field, and the pound sign.
Example: **{Units_Ordered:10#}**

Numbers; Left-Justified; two decimal places: Append a colon, the desired length of the field, and the percent sign.
Example: **{Units_Ordered:10%}**

Numbers; Right-Justified; no decimal places: Append a colon, the desired length of the field, and the exclamation mark.
Example: **{Units_Ordered:10!}**

Numbers; Right-Justified; no decimal places: Append a colon, the desired length of the field, and the asterisk symbol.
Example: **{Units_Ordered:10*}**

Currency; Right-Justified: Append a colon, the desired length of the field, and the dollar sign.
Example: **{sales_amount:10$}**

Currency; Left-Justified: Append a colon, the desired length of the field, and the ampersand sign.
Example: **{sales_amount:10&}**

Skip Field if Value is Null: Append a tilde.
Example: **{Comment_Code:30~}**

Embedding URL Links

You can send an email with a URL link in it (such as a link to a shipper's website). For example:

http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers={fedexnumber}

Note that the value '{fedexnumber}' comes from the associated query.

HTML Message Design

To create your email alert in HTML format, you need to use a standard HTML editing tool, such as FrontPage™ or Microsoft Word™.

Using such a tool, design your message as you wish it to appear; when finished in your HTML editor, copy your HTML source code from your editor into the email 'Message Text' field.

Once you have done so, scroll the list of "Available values" to the end of the list. Place the {BEGIN*HTML} command at the beginning of your HTML syntax, and place the {END*HTML} label at the end of your HTML syntax.

Multiple Records Per Alert Message

The previous illustration shows an event that sends out one alert message per overdue invoice. But what if you wanted one alert message that contained all overdue invoices? Or one alert message per salesrep who has clients with overdue invoices?

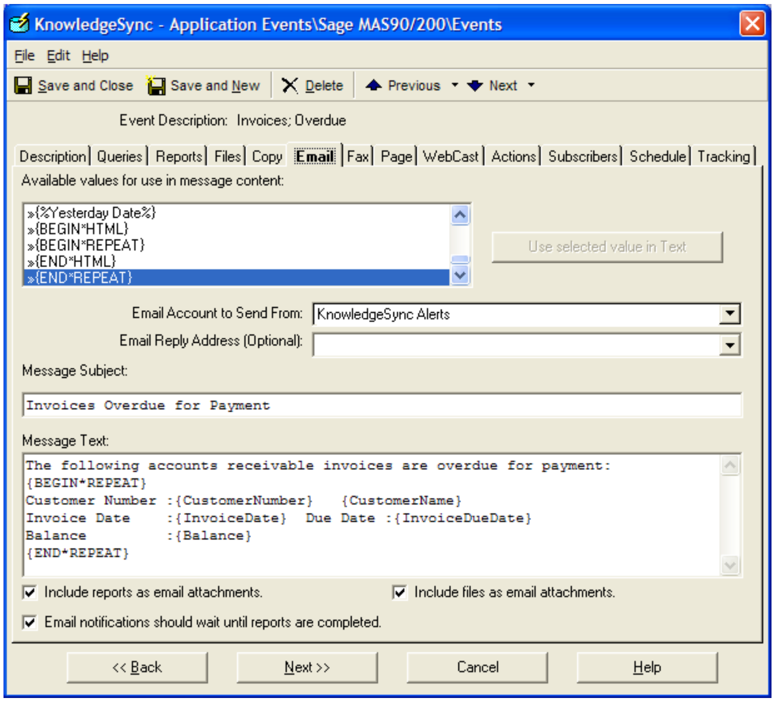
You can configure an event to include the details of multiple records in a single alert message; this uses a function called "Begin Repeat".

Putting All Records in a Single Alert Message

To change the alert message for the "overdue invoice" event so that it sends just a single alert message, you would edit the message text, identify the part of the message that you wish to have "repeated" for each overdue invoice, and surround that section of the message with the commands {BEGIN*REPEAT} and {END*REPEAT}.

{BEGIN*REPEAT} and {END*REPEAT} are located at the bottom of the list of "Available Values".

When used in the 'Overdue Invoices' event, the alert message would look like the following:



A SINGLE ALERT MESSAGE FOR ALL INVOICES

Grouping Records in a Alert Messages

An event can send one alert per triggered record; an event can send one alert for all triggered records. An event can also send out one alert that contains a group of similar records. For example, a KnowledgeSync event could retrieve overdue invoices and send a CFO one message per customer -- each message would list all of the overdue invoices for that customer.

Alert messages can "group" records based either on a common field of data (such as customer, region, product, etc.), or based on the recipient of the message. The following sections will detail how to group records based on a common field of data; the section on "Alert Recipients" details how to group records based on the alert recipient.

How KnowledgeSync "Groups" Records

Consider an event that retrieves overdue invoices and sends a CFO individual messages listing each customer's overdue invoices. To configure such a scenario, you need a query that not only retrieves overdue invoices, but also groups them together by customer.

This "grouping" (also referred to as "sorting") is specified on the query level; thus the query that retrieves overdue invoices would also group these invoices by customer. Once a query is designed in this manner, any event that uses such a query can be configured to "break" to a new message whenever the grouping value changes.

Thus in order for an event to successfully group records together in an alert message, first make sure that the event's query is configured to "sort" its records by the same field that you wish to group by in your alert messages.

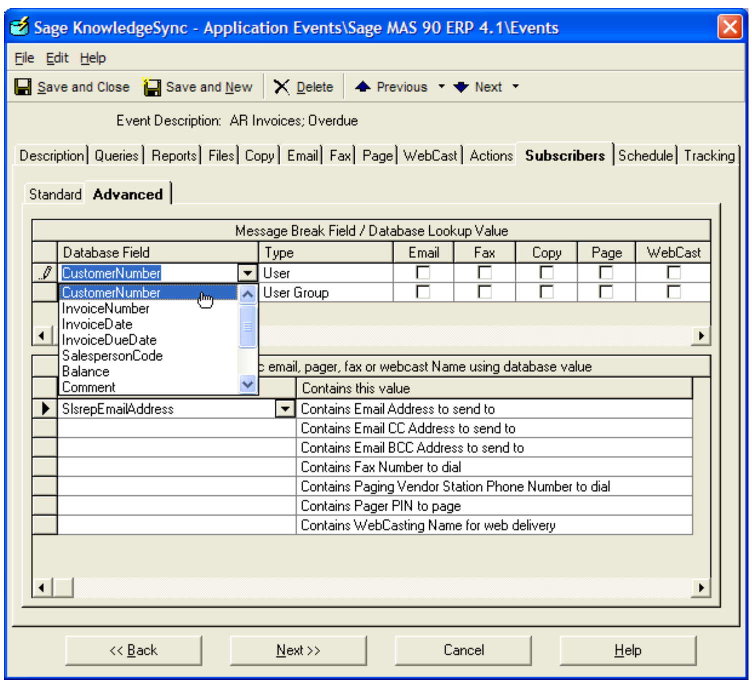
Grouping Records by a Common Field

Let's again consider the event that retrieves overdue invoices and sends a CFO one message per customer, each message listing a customer's overdue invoices. We will assume that the query for this event sorts its results by customer name or number.

After choosing the event's query, you would design the alert message using {BEGIN*REPEAT} and {END*REPEAT} around the detail lines that you wish to be repeated for each matching invoice.

Since "break" fields are often – but not always – associated with an alert recipient, you would go to the "Subscribers" tab to specify your break field.

Go to the "Subscribers" tab and click on the "Advanced" sub-tab. Go to the first field in the top grid, click on the list button and choose your "grouping" field (in the above example, this would be the "customer number" field). That's all there is to it:



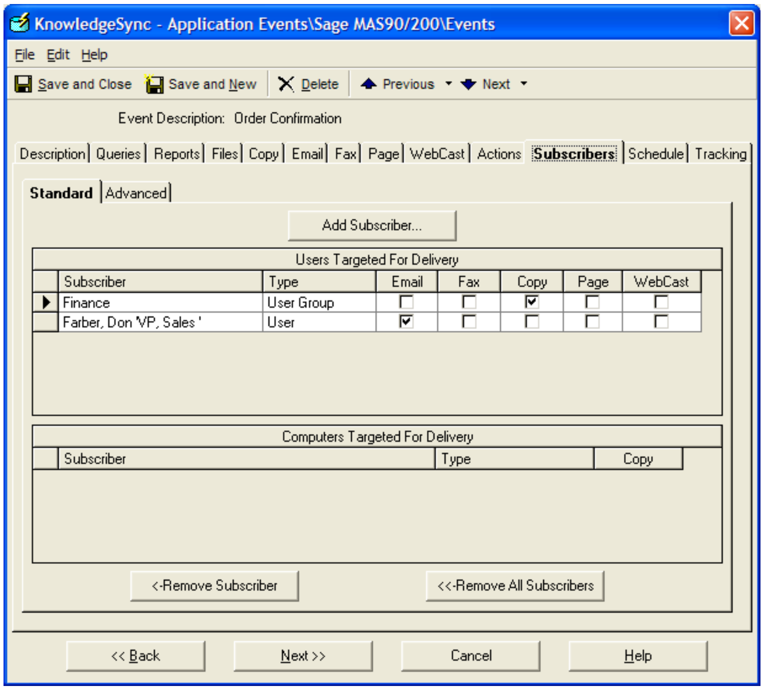
AN EVENT THAT GROUPS INVOICES BY CUSTOMER

When the "overdue invoice" event runs, KnowledgeSync will create one alert message for each customer who has overdue invoices (each message listing all of that client's overdue invoices), and then will deliver each of those messages to the selected recipients.

E-Mail Message Handling Options

At the bottom of the E-Mail tab there are three checkboxes which do not pertain to the Professional Edition. You may ignore them.

Subscribers Tab



EVENT "SUBSCRIBERS" TAB

Alert Recipients (Subscribers)

View / Edit	*: Expand event; expand Subscribers; double-click on the Subscriber you wish to view/edit*
Add	*: Double-click on event name; go to 'Subscribers' tab*
View Profile	*: Right-click on subscriber name & select "Edit"*

The "Subscribers" tab is where you specify whom will receive the email alert when this event's conditions are met. There are three items you need to consider when choosing subscribers for an event:

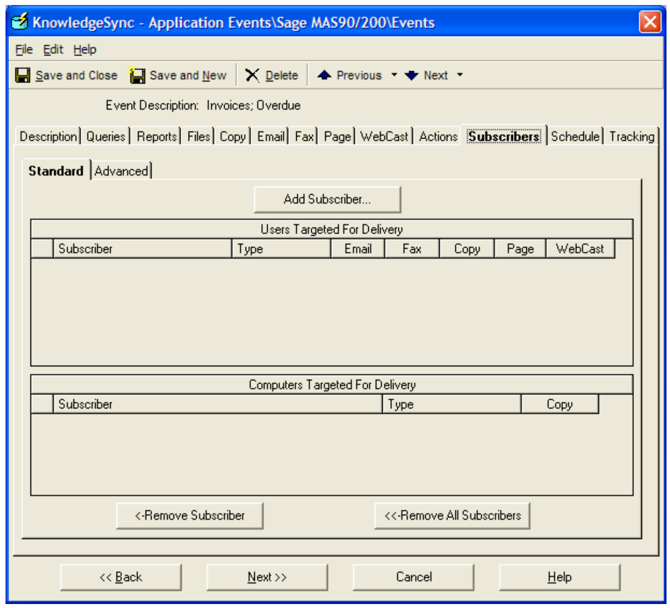
1. Should the event notify one or more specific people or groups? If an event should, for example, notify the CEO, the Sales Manager, or everyone in the Finance group, you will need to select these recipients as "standard subscribers".

2. Should the event notify one or more people who are ***associated with*** the records that meet the event's conditions? An 'Order Confirmation' event, for example, usually notifies the customer for whom the order was placed, and their salesrep.

3. Should the event “group” records together according to the recipient of the message? For example, you might have an event that sends each salesrep a list of ***their customers*** who have overdue invoices.

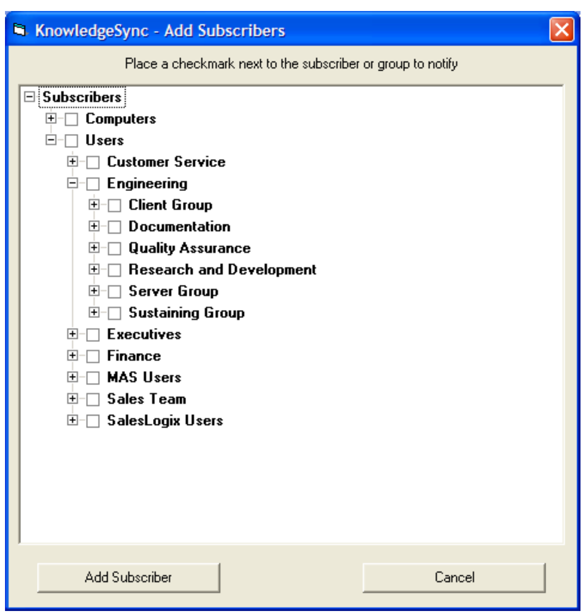
Choosing a “Standard” Subscriber

To choose a “standard” subscriber for an event, click on the “Subscribers” tab:



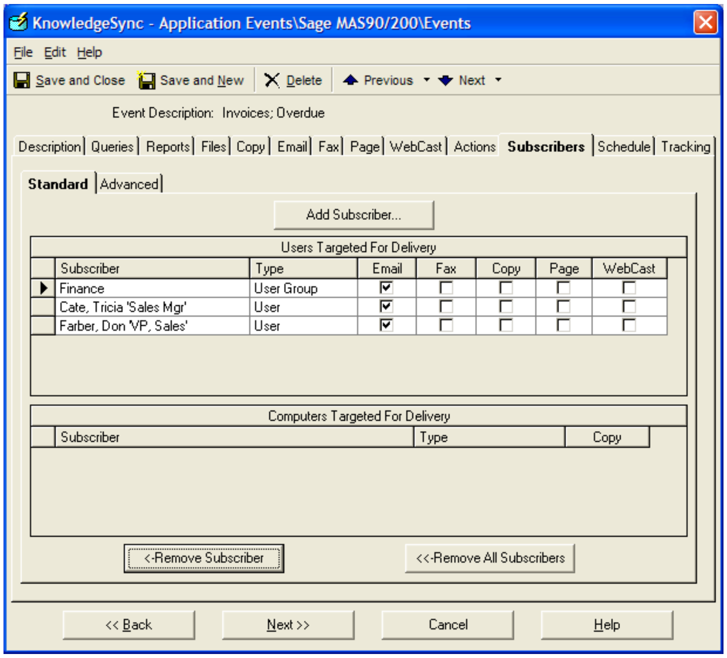
STANDARD “SUBSCRIBERS” TAB

Click on the “Add Subscriber” button and you’ll see a window like the following:



STANDARD “SUBSCRIBERS” TAB

Place a checkmark next to the names of the subscribers – or subscriber groups – you wish this event to notify. When done checking subscribers/groups, click on “Add Subscriber”:



SELECTED SUBSCRIBERS

(Email is the only available alert delivery method in the Professional Edition; the other alert methods are available in the Enterprise Edition.)

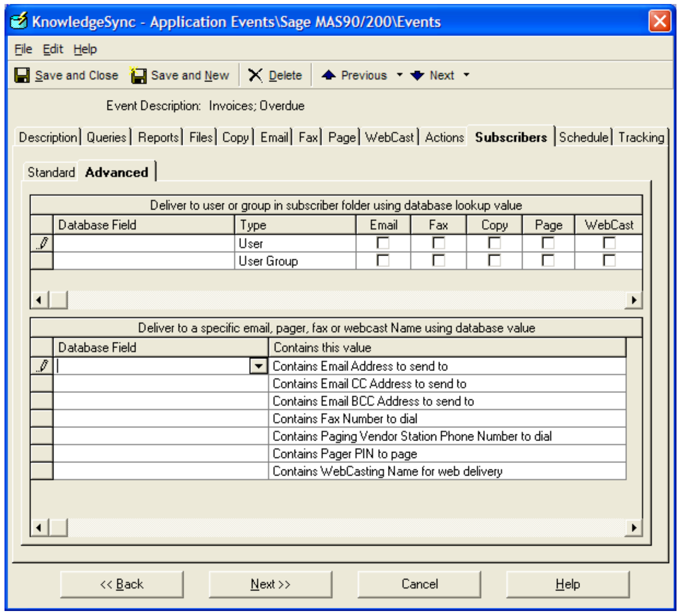
Choosing an “Advanced” Subscriber

An “advanced” subscriber is a person who is associated with a record that meets an event’s criteria. If an event is checking sales orders, an advanced subscriber might be the salesperson associated with the order as well as the customer associated with the order. If the event is checking purchase orders, an advanced subscriber might be the vendor associated with the PO.

Before you choose an “advanced” subscriber for an event, you should check to see that the query selected for this event provides you access to the field(s) that contain the email address for the advanced subscriber(s) you wish to select.

For example, if you are working with an ‘Order Confirmation’ event and wish to configure the event to alert the customer and the customer’s salesperson, you should make sure that the query retrieves the email address for both of these recipients. To select an Advanced Subscriber, follow these steps:

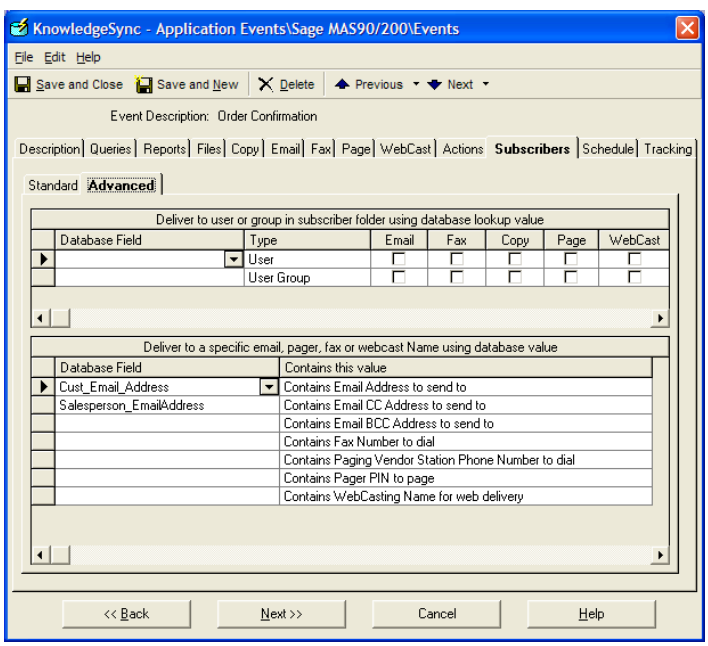
1. Within the ‘Subscribers’ tab, click on the ‘Advanced’ tab. You will see the following window



ADVANCED "SUBSCRIBERS" TAB

2. Refer to the first three fields in the lower grid – this is where you will specify the name of the database field that contains the email address that you want the event to deliver its alert to. Click in any of these 3 fields, click on the list button, and select the field that contains the email address you want the alert delivered to.

   For example, the following illustration shows an 'Order Confirmation' event that notifies both the customer and the customer's salesperson:



ORDER CONFIRMATION – NOTIFYING BOTH CLIENT & SALESREP

Sending a Person All of Their Records

In “Grouping Records by a Common Field” it was explained how you can use {BEGIN*REPEAT} along with a “break field” to create an event that sends individual alert messages that contain multiple, similar records.

You can take this a step further – by creating an event that sends individual alert messages that contain multiple records that are all associated with a specific individual, and then deliver the alert to that individual.

For example, we’ve detailed an event that sends a CFO one alert for each client who has overdue invoices. (Each alert lists a client’s overdue invoices.) Consider an event that sends each customer a list of their overdue invoices. This can be done in a single event.

This event’s query would sort its records by customer. You would design your alert message and use {BEGIN*REPEAT} within it. And, you would use an Advanced Subscriber whose value is the email address of the customer.

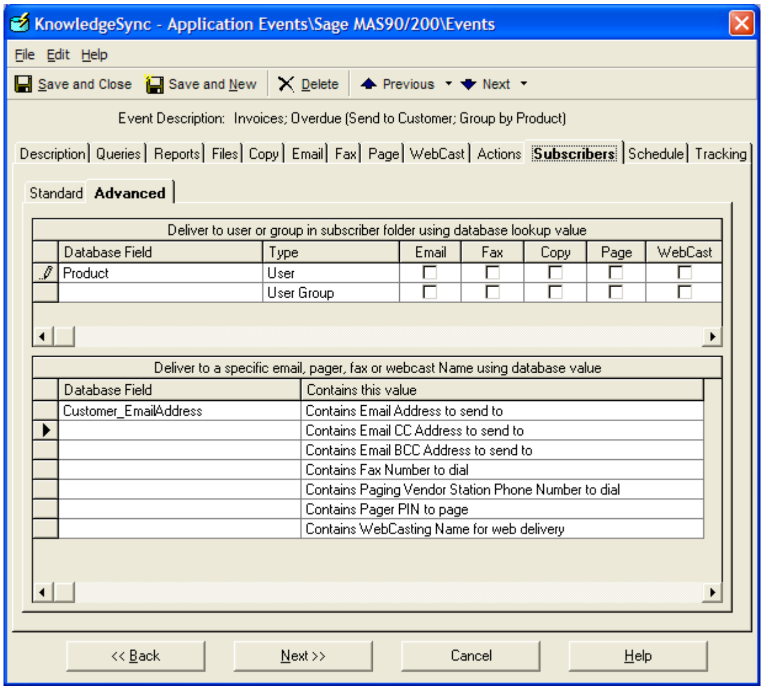
This configuration would cause the event to repeat the details of each overdue invoice for a specific customer within a single alert message – and then each message would be delivered to the corresponding customer.

Sending a Person a Subset of Their Records

The preceding scenario can be expanded on. What if you don’t want to send each customer one email for all their invoices, but rather one email for their invoices for product ‘a’, a second email for their invoices for product ‘b’, and so on.

This is referred to as “sending a person a subset of their records” – and is done using the same process as above – but with one additional step: the designation of a secondary break field.

In the preceding section, the primary break field is “customer”; if a secondary break field is needed, you would specify this value in the first field in the upper grid on the “Advanced” Subscribers tab as follows:

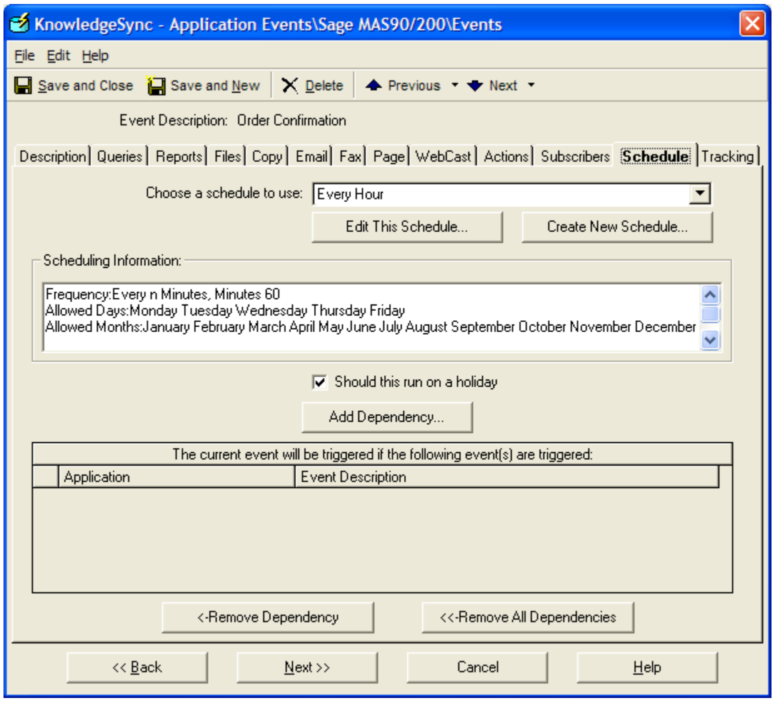


OVERDUE INVOICES – SEND TO CLIENT; GROUP BY PRODUCT

Viewing a Subscriber's Profile

To view a subscriber's profile (such as their email address & their work hours versus non-work hours), use the Navigator to locate the subscriber whose profile you wish to view. Then, right-click on that profile and choose "Edit".

Schedule Tab



EVENT "SCHEDULE" TAB

Event Frequency of Checking (Schedule)

View / Edit : *Expand event; go to "Active/Inactive" branch; if 'Active', right-click & select "Edit" to modify*
Add : *(If 'Inactive') double-click on event name; go to 'Schedule' tab*
Add New Schedule : *Right-click on 'Scheduled' branch & select "Create New"*

The last step in configuring an event is specifying how often you wish the event to check for its conditions; this is referred to as the event's "schedule":

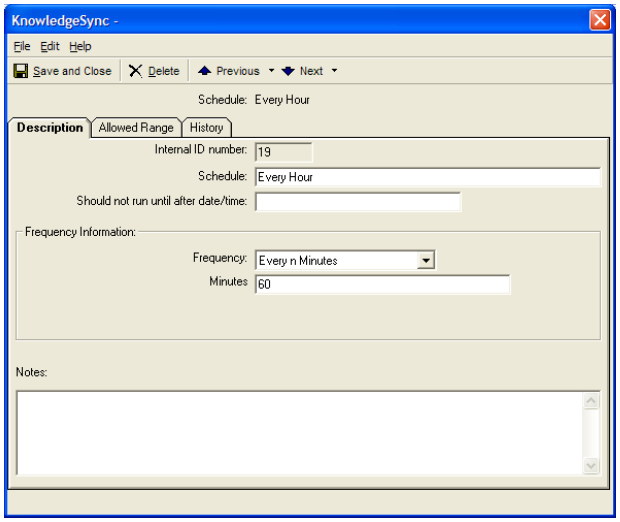
KnowledgeSync comes pre-configured with approximately a dozen schedules; you can use these schedules, modify them, and also create additional schedules of your own.

To choose a schedule for an event, click on the list button at the top of this window. You may also specify whether this event will run if its submission date falls on a holiday (holidays are defined in the Administrator module).

(Event dependencies are not enabled in the Professional Edition.)

Adding/Editing a Schedule

To add or edit a schedule in KnowledgeSync, click on either the "Edit This Schedule" or "Create New Schedule" button. A window such as the following will appear:



ADDING / EDITING A SCHEDULE

- You can specify the following information for a schedule:
- Schedule : The schedule description ("Daily at 3 PM")
- Should Not Run Until : The date on which this schedule will become active (enter in the format xx/xx/yyyy) Leave blank to activate the schedule immediately
- Frequency : Choose from:
    - Every 'n' minutes
    - Hourly
    - Daily
    - Weekly
    - Monthly
    - Annually
    - None (used only for events that have no schedule)
- Interval :The time of day or day of week to run.
- Allowed Range : The months of the year, days of the week, and beginning and ending hours during a day when the schedule can run

Saving Your Event

Once you have completed filling out the Description, Queries, Files, Email, Subscribers, and Schedule tabs, your event configuration is complete. Click on "Save and Close" at the top-left of your window.

Test An Event

To test the execution of an event, follow these steps:

1. Expand the "All Events" branch and navigate to the event you wish to test.

2. Right-click on the event and choose “Test This Event Now”.

3. You will be prompted to confirm that you wish to test the event right now, and then will be presented with a web browser window in which the details of the tested event will appear.

Note that “testing” an event does NOT actually run the event; it just displays a web browser that shows you the details of what would have happened if the event had actually been run.

Schedule An Event to Run Now

To schedule an event to run (one time) right now, follow these steps:

1. Expand the “All Events” branch and navigate to the event you wish to run right now.

2. Right-click on the event and choose “Schedule This Event Now”.

3. You will be prompted to confirm that you wish to run the event right now, and then will receive a confirmation that the event has been submitted.

Please refer to the Sage KnowledgeSync Monitor to review the status of this event once it has been submitted to run.

Tracking Triggered Records

If “repeat notifications” is not checked for an event, KnowledgeSync will store a list of the records that meet an event’s criteria and have already been triggered. (This list may be viewed in the “Tracking” tab of an event.)

And if “repeat notifications” is not checked and you re-run an event, the event will NOT re-trigger for those records that have already been triggered. So, you need the ability to “un-trigger” a record – to remove it from the list of triggered records for an event. To clear a triggered record from the history of an event, do the following:

- Click on the “Tracking” tab of an event
- Highlight the record you wish to “un-trigger” and click on “Remove Tracked Items” or click on “Remove All Tracked Items”.

Note that removing tracked items from an event will cause those items to re-trigger the next time the event is run.

E-Mail Alert Requirements

To send e-mail alert messages from KnowledgeSync, **all** of the following need to be true:

- ➢ The event must have an e-mail subject and message text.
- ➢ The event must have a valid e-mail sending account

- The event must have at least one subscriber who is to receive alerts via e-mail
- The subscriber(s) who are selected to receive alerts via e-mail must be "active", they must have a valid e-mail address specified in their profile, and their "delivery times" must be configured to allow message receipt on the day/time the event is triggered.
- The KnowledgeSync Service and email server must be running
- The event's associated query must retrieve matching records
- The matching records must not be in a triggered state.

  (If the event has already been triggered, you must: a) remove the triggered items, or, b) the event must be configured to "repeat notifications for triggered items".)
- The "Hermes EMail Server" Windows Service must be running (this is the email service that is embedded within Sage KnowledgeSync)

Vineyardsoft suggests that you run an "e-mail test" (from the Administrator module) to ensure that KnowledgeSync can send a generic email message before attempting to send mail as a result of a triggered event.

Monitoring the Status of Events

When an event triggers the sending of an e-mail alert, you can use the KnowledgeSync Monitor to track the status of the delivery of those alerts.

Monitoring the Status of E-Mail Alerts

In the Monitor, you can click on the "Email Delivery" branch, and within that you can track:

Mail messages that are "Pending" delivery.

Mail messages that have been "Sent" successfully.

Mail messages with "Errors" that have failed to be delivered successfully.

If any of your e-mail alerts have failed to complete successfully because of an error condition, you may attempt to correct the message delivery, mark the delivery as "complete", or you may manually delete the erroring delivery.

(Go to the KnowledgeSync Administration module, click on the "Corrective Actions" branch, and then click on the "Email Delivery Errors" sub-branch.)

Note that KnowledgeSync will attempt to re-deliver an erroring e-mail message every minute.

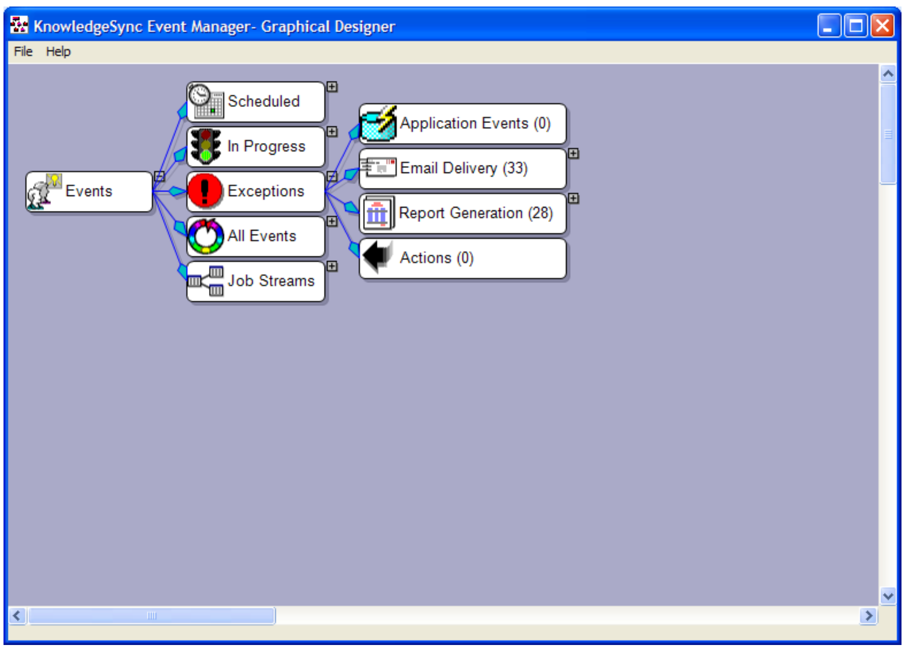
Event Exceptions

The branch called “Exceptions” shows you those events that are currently in an “Error” state in Sage KnowledgeSync. This option will show the same content as is available from the Sage KnowledgeSync Monitor, using any of the Monitor “Errors All” options.

Event “exceptions” occur because of an error in the processing of an event. Errors can be caused by such things as an email server being down.

Like the “In Progress” tab, the number of sub-branches that you will see under “Exceptions” will vary – depending on whether you have any event errors or email errors. Next to the title of each of these sub-branches will be a number that shows how many “exception” items there are in each of these categories.

For example:



EVENTS THAT ARE IN AN “EXCEPTION” (ERROR) STATE

(Note that since Sage KnowledgeSync automatically re-queue events that are in an erroring state, all items that are listed as “exceptions” will also automatically appear within the “In Progress” branch of the Navigator.)

When you expand any one of these sub-branches, you will be shown a list of the applications for which these exception items exist. If you then expand any one of these application branches, you will be shown a listing of the specific items that are in a pending state. You can drill-down into the details of the exception records and see the following information about them:

- The name of the event that is related to the exception item
- A box with a red exclamation mark in it which describes the error that is occurring* (see notes below)

- More details about the specific item that is in an error state. This information will vary, based upon the item; for example, email errors will show you such details as the content of the alert as well as the email address of the account that the alert is to be sent from.

Note the following:

1. The “Exceptions” branch will show you sub-branches only for those Sage KnowledgeSync servers that are currently enabled and active.
2. If an Exceptions sub-branch has no “Exceptions” items, the branch will show with a zero (‘0’) next to it.
3. The “Exceptions” branch will show no results if the Sage KnowledgeSync Service is not currently running.

Correcting Event Exceptions

When a Sage KnowledgeSync event encounters an error, Sage KnowledgeSync automatically re-queues the event and if the error is something that is self-correcting (such as an email server that is down), the error will eventually go away once the event successfully runs. However, there are other error conditions which are not self-correcting, and you have the ability to “correct” the error that is occurring or manually “flag” the error as complete and remove it from “pending” items.

To correct an error, you would begin by using the Navigator “Exceptions” branch to navigate to the particular error/exception that you wish to correct and then follow these steps:

- Go to the Exceptions box with the red exclamation mark in it – this is the box that contains the details of the error condition that is occurring
- Double-click on this box. A window titled “Edit/Complete Error Status” will appear. From here you will see full details of the error that is occurring as well as have the ability to correct or manually override the completion status of this event.

Once you are finished correcting or completing an exception record, simply click on the “OK” button at the bottom of this window to save your entry and return to the main Navigator window.

KnowledgeSync Administration

The KnowledgeSync Administration Module lets you perform seven functions:

View the status of application servers

View the names of all users logged onto KnowledgeSync modules

Configure software settings for e-mail alerts

Specify user authorizations for access to different KnowledgeSync modules

Maintain and optimize the KnowledgeSync database

Log into the KnowledgeSync Administrator (default user name is “Admin” and no password); you will see “Administration Folders” with a branch titled “Activity.”

Activity Folder

The KnowledgeSync Activity folder tells you about the current processing and user activity occurring within the application.

Server Status

This will display the current status of all the servers used by KnowledgeSync. Note that the first four servers must be running in order for KnowledgeSync to successfully check for events and trigger email alerts.

Enabling / Disabling a Server

You may either **enable** a server to run, or **disable** a server from running.

To enable a server, select (double-click on) the server record from the Server Status window and place a check in the field titled "Allow Server to Process."

To disable a server, select (double-click on) the server record from the Server Status window and make sure that there is no checkmark in the field titled "Allow Server to Process."

KnowledgeSync Server Login Information

The KnowledgeSync Service logs into KnowledgeSync using user “Admin” and a blank password. However, if you delete the ‘Admin’ name or change its password, you need to tell the KnowledgeSync Service what username and password it will use when accessing the KnowledgeSync database. Follow these steps:

- Highlight (single-click on) the “Server Status” branch.
- Click on the “Server Login Information” button.
- Fill in the username and password for the KnowledgeSync Service.
- Click on OK.

Current User Logins

The **Current User Logins** option tells you who is currently logged into the KnowledgeSync application.

Corrective Actions

See preceding section titled “Correcting Event Exceptions”.

Software Set-Up

In the Professional Edition, there is only one option that requires your review; holiday calendar definition

Holiday Schedule

When KnowledgeSync events are configured, you have the option to specify whether or not the event will be submitted if it's scheduled execution date falls on a holiday. The definition of these holidays is done within this option.

To define a new holiday, click on the "Holiday Schedule" branch and then click on the "New Holiday" button at the top-left of the Administrator window. Specify

The holiday name (e.g., "Christmas Day")

The holiday date (entered in the format "XX/XX/YYYY")

Whether the holiday falls on the same date every year (e.g., Christmas always falls on December 25th)

Whether the holiday is currently active, thus enabling an event to be configured to observe that holiday.

User Access: Logins

The last branch in the list of Administrative functions is titled "User Access" is where you control the user access privileges of people who have access to KnowledgeSync.

Expand the "User Access" folder and single click on the branch called "Logins." Click on the "New KnowledgeSync Username" button at the top-left. You will be taken into the option where you can define this user's access settings.

The "General" Tab

The "General" tab is where you can specify the following:

- Login Name: The name the user will log into KnowledgeSync with.
- Description: The user's full name.
- Active: Whether this user is granted access to the selected modules.
- Set/Change Password...: Click this button to password protect this username. Passwords may be 1-14 characters in length and are case sensitive.

If you accidentally change authorizations so that no one can access KnowledgeSync, contact Vineyardsoft's Technical Support department.

The "User Access" Tab

The "User Access" tab controls what KnowledgeSync modules and functions a specific user has access to. The options are divided by application module (the KnowledgeSync Administrator, Event Manager, and Monitor). Note the following:

If you give a user access to the “User Access” option within the Administrator, that user can modify the authorization settings for himself/herself and for any other users.

Database Tools

The final administrative functions in KnowledgeSync are located under the “File” menu. The options are:

Remove Completed Items

Remove Pending Items

Compact Database

Remove Completed Items

Depending on how many events you are checking, how often you check them, and how many alerts you send out, the amount of history in KnowledgeSync can grow quite large. The option to “Remove Completed Items” allows you to remove (delete) the history of completed events from the KnowledgeSync database.

This removal process may be done on either an ad-hoc manual basis, or you may schedule it to occur automatically within the KnowledgeSync database.

To manually remove completed items from the database, follow these steps:

- Shut down the KnowledgeSync Service.
- Make sure that no other users are logged onto the application.
- Click on the Administrator “File” menu.
- Select “Database Tools”.
- Select “Remove Completed Items”
- Type in the date prior to which you wish to remove all KnowledgeSync history of completed events.
- Click on the “Remove” button.
- You should always select the option to “Compact Database” after you have removed completed items.

Purging History & Database Backup

By default, KnowledgeSync will automatically remove completed items more than 30 days old every night at 1:03 AM. After doing so, KnowledgeSync will backup its database. To view or modify this setting, follow these steps:

- Click on the Administrator “File” menu.
- Select “Database Tools”.
- Select “Remove Completed Items”.
- Click on the “Automate This Task” button.
- Specify the time of day that this procedure should run.

- Indicate how many days worth of history KnowledgeSync should retain in its database. (The default is 30 days.)
- Click on “OK”.

KnowledgeSync’s back-up procedure makes copies of the following database files:

- “KS_Inbox” (a “KS_Inbox_Backup” is created)
- “KS_Triggered” (a “KS_Triggered_Backup” is created)
- “KS_Object” (a “KS_Object_Backup” is created)
- “KS_Changed” (a “KS_Changed_Backup” is created)

Vineyardsoft suggests that you create a nightly job (such as a batch job) that picks up these four files and either makes copies of them, writes them out to a tape back-up, or otherwise safeguards them for later use, if necessary.

- If you are running KnowledgeSync under a heavy load (e.g., 50 or more events running every few minutes, sending alerts to 100+ subscribers), you may wish to decrease the number of days to ‘14’ to or even ‘7’. This will optimize system performance.

Remove Pending Items

“Remove Pending Items” lets you to remove (delete) pending items (such as pending e-mail messages) from the KnowledgeSync database. This option is particularly useful if you have a large number of pending items that are pending because of an error state, and you simply wish to delete the erroring records.

To remove pending items from the database, follow these steps:

- Shut down all KnowledgeSync Service.
- Make sure that no other users are logged onto the application.
- Click on the Administrator “File” menu.
- Select “Database Tools”.
- Select “Remove Pending Items” and the following window will appear:
- Select the types of items you wish to remove. Choose from:
  Application events
  E-Mail messages
- Click on the “Remove” button.
- Click on “Yes” to confirm the removal.
- Run “Compact Database” after you have removed completed items.

Compact Database

Compacting the KnowledgeSync database is always advised after you delete records from the database. Note that you'll need 3 times the size of the database in free disk space to compact the database. To compact your database, follow these steps:

- Click on the Administrator “File” menu.
- Select “Database Tools”.
- Select “Compact Database”.
- Click on the “Compact” button.

Note that you can delete the KS_*_[previous_year].mdb databases from your system

Moving KnowledgeSync to a New Server

Moving KnowledgeSync from one server to another server is referred to as “Re-Licensing”. There is a $500 fee for each time you wish to re-license KnowledgeSync.

To move KnowledgeSync from one server to another, follow these steps:

- Install KnowledgeSync on the new server, using (if possible) the **same disk and directory** on the new server as you had chosen on the old server.
- Copy all the folders from old server to the new one. Make sure to get all of the files from the following folders located within your “KnowledgeSync” folder:

  \Attachments
  \Data
  \Reports
  \Scripts

Event Monitor

The KnowledgeSync Event Monitor is a real-time “dashboard” or “Operator’s Console” that you can use to keep track of the status of the events that you are checking for and the alerts that have been (or need to be) delivered.

Using the Monitor, you can keep track of:

The status of the application servers that KnowledgeSync uses to check for events and send alerts

The events that are scheduled to be checked and those that have been triggered

The alerts that have been sent out (or are about to be sent out), including whom they are sent to, via what means, and whether they were successfully delivered

The full text of the outgoing alert messages

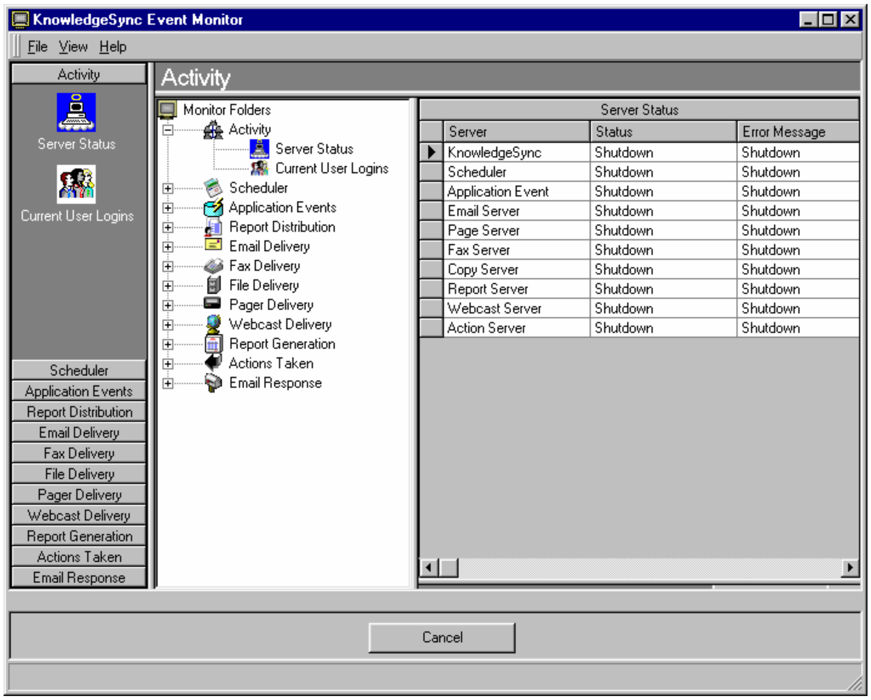
Whether any kind of errors have occurred that would prevent KnowledgeSync from either checking for events or responding to them

Please note that the Monitor is an informational display only; you cannot use the Monitor to modify any of the information that appears within it.

Logging In to the Event Monitor

The KnowledgeSync Event Monitor is a separate module within the KnowledgeSync application, and so the first step is to log into that module.

- Log into the Event Monitor (default user "Admin" and no password):



KNOWLEDGESYNC MONITOR INITIAL WINDOW

The first branch of information that is shown to you is the "Server Status" branch (within the "Activity" folder) and this is detailed in the following sections.

Resizing the Display Grid

In some cases, you will find the need to expand or contract the width of specific columns within the grid. To do so, follow these steps:

- In the heading line of the grid (the line with the column titles in it), position the cursor at the vertical dividing line between the columns whose width you wish to adjust.
- The cursor will change into a two-headed arrow.
- Click your left mouse button and hold.
- Drag your mouse to the right or to the left to enlarge or decrease the width of the corresponding columns.

Specifying a Column's Sort Order

You can control the order in which records are displayed anywhere in the Event Monitor.

Simply move your cursor to the heading above any column in the Monitor and click your mouse/cursor in that field. Each click of your mouse/cursor will reverse the order in which records are displayed.

Activity Folder

The KnowledgeSync Activity folder tells you about the current processing and user activity occurring within the application.

Server Status

This will display the current status of all the servers used by the KnowledgeSync application. The possible status states are as follows:

Shutdown: The server is not running at this time. Among the possible reasons for this are:

- The KnowledgeSync service could be shutdown.
- The server is flagged not to run.

Idle: The server is running and in memory but is not processing any data.

Processing: The server is processing event data.

Startup: The server is in initialization and startup mode.

KnowledgeSync Server Notes

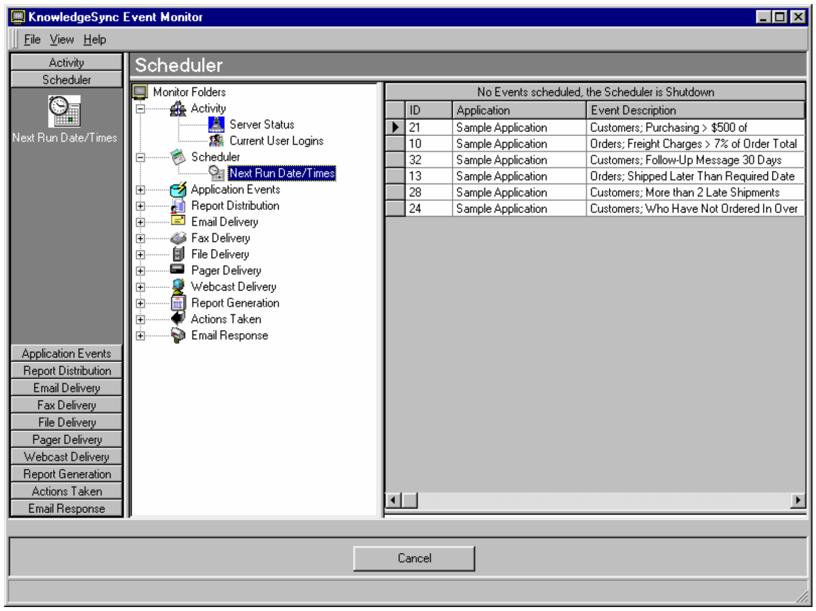
Please note the following about the KnowledgeSync servers:

If any of the first three servers are shutdown or paused, KnowledgeSync will not be able to check for events, send notifications about triggered events, or execute event response actions.

If the email servers is shutdown or paused, KnowledgeSync will not be able to send notifications.

Scheduler Folder

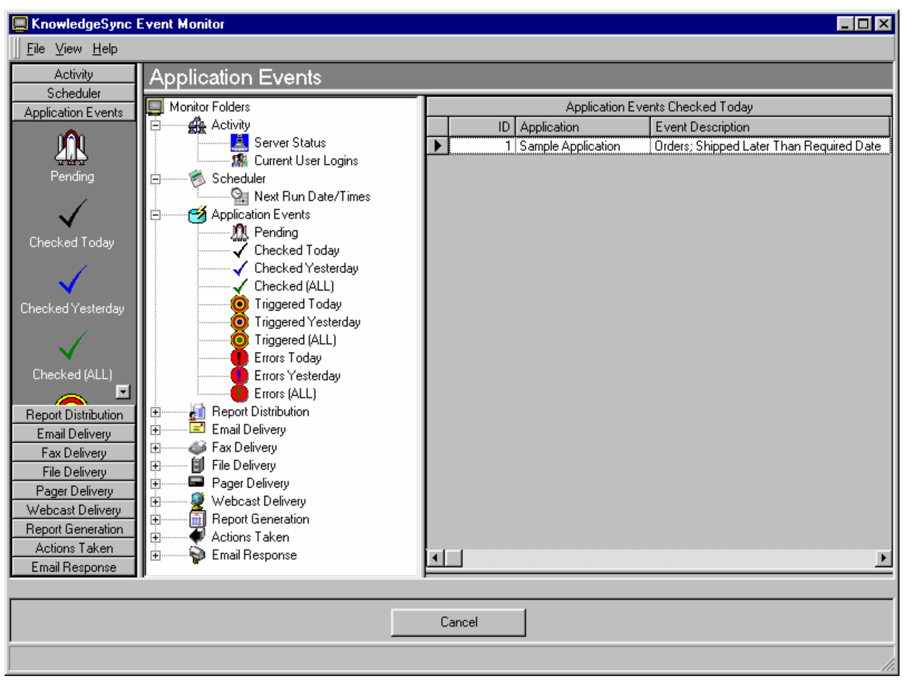
The “Scheduler” folder has one branch within it – “Next Run Date/Times” – and this allows you to see what events are due to be submitted next.



EVENTS "NEXT SCHEDULED RUN DATE / TIMES"

Application Events Folder

The "Application Events" folder enables you to track the status of application events that are due to run, have already run, or have failed to run successfully because of an error.



APPLICATION EVENTS: CHECKED TODAY

Application events are divided into four categories:

Pending. A pending event is one that has not been submitted either because its time has not yet arrived, or because the event failed to complete successfully.

It is important to understand that an event is placed into a pending state at the minute it is due to be submitted, and thus does not remain in a pending state for very long (unless the event errors).

Checked. A checked event was successfully executed. A checked event may or may not be "triggered", depending on whether its conditions were met.

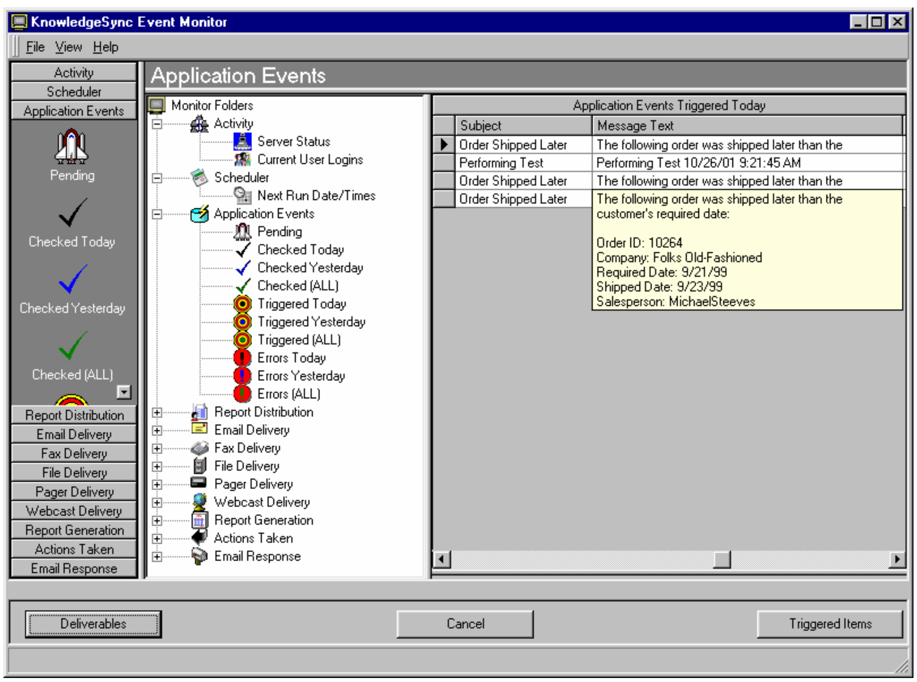
Triggered. A triggered event was successfully executed and whose conditions were met. Note that a single event can create multiple triggered records.

Errors. A record will show up under the "errors" branch if KnowledgeSync has been unable to successfully check the event. An event that fails to be checked successfully will automatically be placed back into the "Pending" branch.

Displaying Full Message Text

Any column of information within the display grid (such as the e-mail alert message text) may be expanded to display the full text that it contains.

To display the full text of a field within the grid, simply point your cursor at that field and the Monitor will automatically pop-up a window that shows you the full content you wish to view.



DISPLAYING ALERT MESSAGE DETAILS

Note that this is an excellent way to test your event alert messages. Instead of actually sending the messages via e-mail, you can simply trigger the corresponding event and view the alert message details in the Monitor.

(And you can use the Administrator function to "Delete Pending Items" to remove these pending alerts if you choose not to send them.)

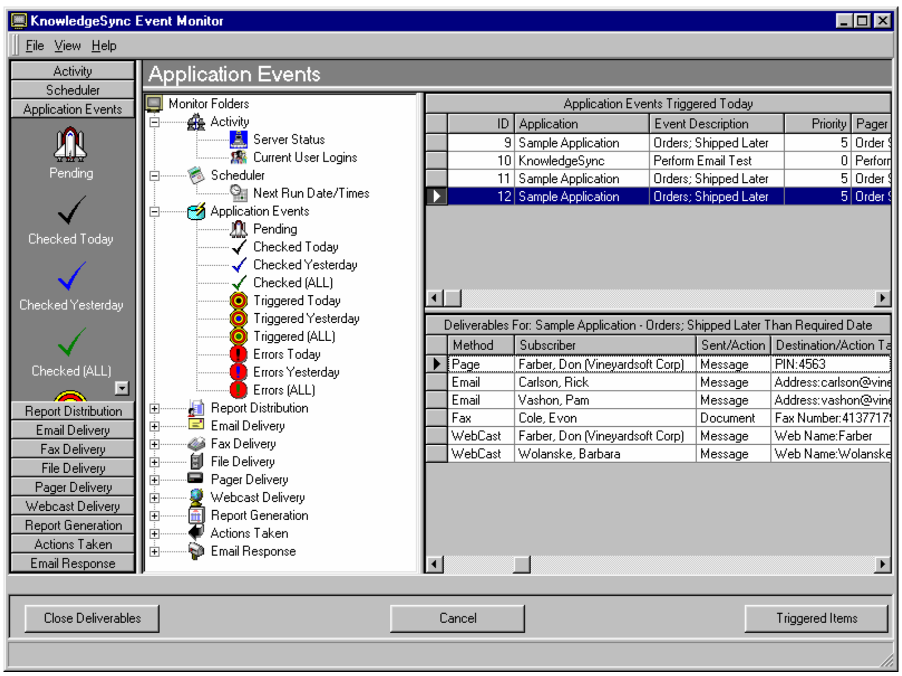
Deliverables Button

The "Deliverables" button is one of the most important (and useful) in the KnowledgeSync Monitor.

When an event is triggered, it often results in alerts being sent to one or more individuals. The "Deliverables" button lets you see who was notified, the address to which the alert was sent, and whether the alert was successfully delivered.

To use the "Deliverables" function, follow these steps:

- Go to any of the "Triggered" branches under the "Application Events" branch
- Highlight (single-click on) the event whose deliverables you would like to see.
- Click on the "Deliverables" button at the bottom-left of the Monitor window.



AN EVENT'S "DELIVERABLES"

Note that you may adjust the height of the deliverables window by clicking and dragging the horizontal dividing line that separates the deliverables window from the triggered event listing.

Triggered Items Button

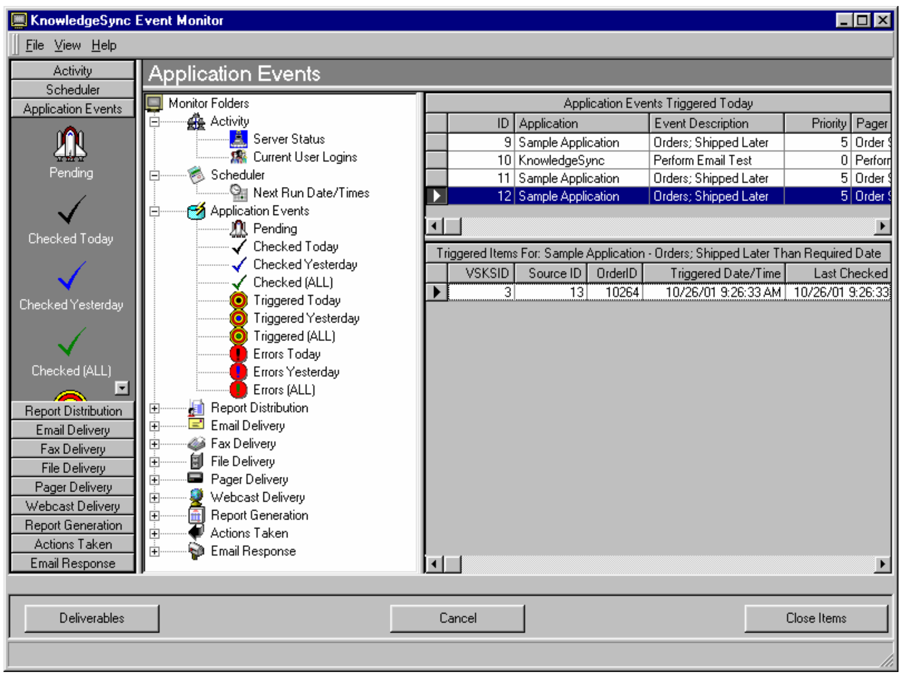
When an event is configured in KnowledgeSync, the event designer has the <u>option</u> to identify a single field of data within the event that will uniquely identify each triggered record.

For an event such as one that is triggered by orders meeting certain criteria, this might be a field such as the "order number." And for an event that is triggered by support calls meeting certain criteria, this might be a field such as the call's "ticket ID."

If an event is configured to store this unique identifying value, then it is also possible within the Monitor to see what these values are for a triggered event. In the Monitor, this unique identifying value is referred to as an event's "triggered items".

To use the "Triggered Items" function, follow these steps:

- Go to any of the "Triggered" branches under the "Application Events" branch
- Highlight (single-click on) the event whose triggered items you would like to see.
- Click on the "Triggered Items" button at the bottom-right of the Monitor window.



AN EVENT'S "TRIGGERED ITEMS"

Please note that you will not have access to an event's "triggered items" if either of the following is true:

- The event's query(ies) do not have a "unique" value identified
- The event is configured to "repeat notifications for triggered events" (specified on the event's "Description" tab)

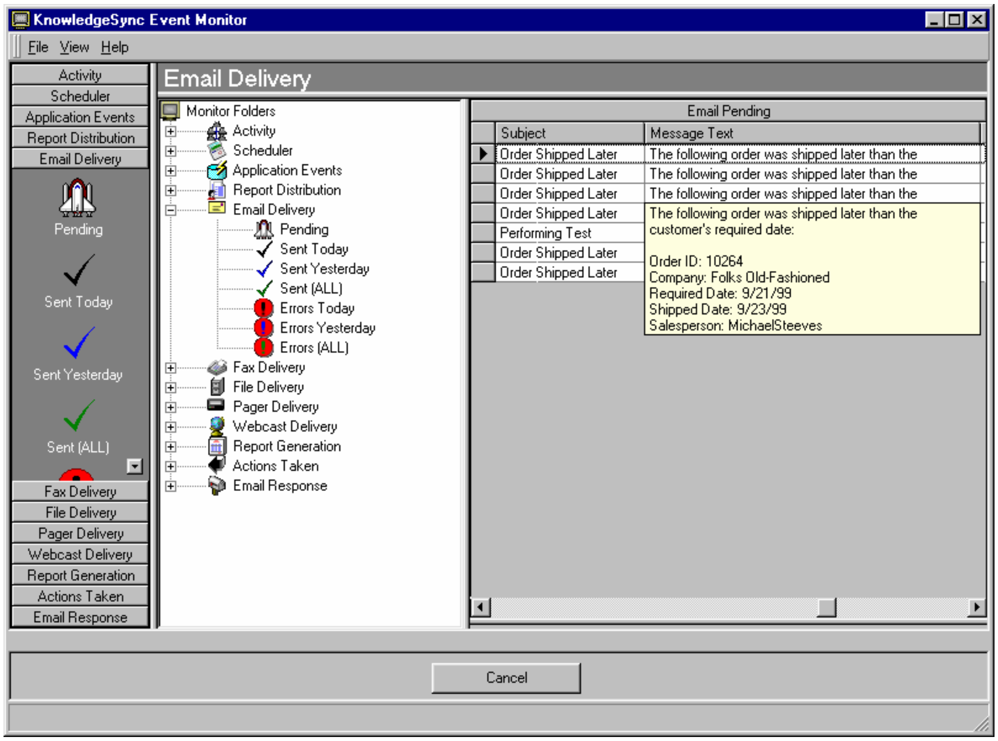
E-Mail Delivery Folder

The "Email Delivery" folder is divided into three branches:

Pending. A pending mail message is one that has not been sent either because KnowledgeSync is busy processing other messages, or because the mail message failed to be sent successfully. (See note about "How to Handle E-Mail Delivery Errors".)

Sent. A “sent” mail message is one that was successfully delivered to its recipient. Note that a mail message that results in an “undeliverable” reply message is still considered successful by KnowledgeSync because the delivery of the message did succeed (even though the recipient was invalid).

Errors. A mail message will show up under the “errors” branch if KnowledgeSync has been unable to successfully send the message. A message that fails to be sent successfully will automatically be placed back into the “Pending” branch.



E-MAIL DELIVERY FOLDER

Note that you may use the “Email Delivery” folder to view the contents of pending e-mail alert messages.

How to Handle E-Mail Delivery Errors

E-mail errors can occur for a number of different reasons, including an error in the recipient’s address, and KnowledgeSync’s inability to access a mail server on a machine that may be down.

Note: The most common reason why an e-mail message would fail to be delivered successfully is that the KnowledgeSync E-Mail Sending Account (as defined in the KnowledgeSync Administrator) is not correctly configured. Please go to the Administrator, review the setup of the KnowledgeSync e-mail account, and perform an “E-Mail Test” to confirm whether this account is correctly set up..

When an e-mail message fails to be delivered successfully because of an error, three things happen:

The message will appear in the “Errors” branch under “Email Delivery”.

The message will appear in the "Pending" branch under "Email Delivery".

KnowledgeSync will attempt to re-send the message every minute until:

- The message is successfully sent
- The mail address error is corrected
- The mail message is deleted

If the message is erroring and you wish to either correct an invalid address or delete the pending message, you need to go to the KnowledgeSync Administrator. From there, you have three choices:

You may go into the "Corrective Actions" branch for "Email Delivery Errors" and may correct the invalid address.

You may go into the "Corrective Actions" branch for "Email Delivery Errors" and may manually delete (or mark as "successfully delivered") this e-mail message.

You may go to the "File" menu, select "Database Tools," and select "Remove Pending Items." You may then select the option to remove all e-mail messages that are pending. Please note that this removes ALL pending e-mail messages.

KnowledgeSync Service Not Running

By default, the KnowledgeSync Windows Service will be auto-configured for you and this step will not be required unless your system shows that the KnowledgeSync Service is not running.

To check to see if the KnowledgeSync Service is running, follow these steps:

- Log in to the KnowledgeSync Monitor module (default user name is 'Admin" and there is no password)
- The first window that you are brought to in the Monitor is for "Server Status". Make sure that the first four servers show a status of "Idle". If they do, your KnowledgeSync Service is running successfully.

  If these servers do not show as "Idle", take the following steps to manually configure your KnowledgeSync Service.
- Go into the "Administrative Tools" option on the Sage KnowledgeSync server.
- Locate the "KnowledgeSync" Windows Service and if it is started, stop the Service.
- Right-click on that service and choose "Properties"
- Click on the "Log On" tab and make sure that this service logs on using an account that has "Domain User" rights
- Save your work and start the KnowledgeSync service and confirm that it stays running. Check status of the first four servers as detailed above.