



# Alerts

## Planon Software Suite

Version: L105

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# About this Document

## Intended Audience

This document is intended for *Planon Software Suite* users.

## Contacting us

If you have any comments or questions regarding this document, please send them to: [support@planonsoftware.com](mailto:support@planonsoftware.com).

## Document Conventions

### **Bold**

Names of menus, options, tabs, fields and buttons are displayed in bold type.



### *Italic text*

Application names are displayed in italics.

### CAPITALS

Names of keys are displayed in upper case.

## Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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# About Alerts

The Alerts TSI allows you to specify alarms and notifications for an action that is to be completed at a set time. Alerts uses data added in other TSIs. This is dependent on the business object for which the notification is selected.

For Alerts to operate as intended, careful configuration is required. Refer to [Checklist](#) for correct configuration steps.

Although Alerts is available as standard in Planon ProCenter , some configuration is required to set up the scheduling mechanism before using this functionality.



For more information on configuration, refer to Planon ProCenter - Suite Installer > The Scheduler.

# Alerts - Concepts

This section describes the concepts available in Alerts and how they interact with each other.

See the links below for more information:

- [Notification](#)
- [Notification definition](#)
- [Notify once definition](#)
- [Run account](#)
- [Task](#)
- [Event based notification definition](#)
- [Alarm](#)
- [Alarm definition](#)
- [Action definitions](#)
- [My alarms](#)
- [Schedule](#)
- [Scheduler](#)

## Notification

A communication that is sent to (a group of) users informing them of a specified event in Planon ProCenter that requires their attention.

Notifications are messages, reminders that are sent to recipients' email addresses or cell phones even when not logged on to Planon ProCenter .

For example:

A Facility Management (FM) department monitors details on reservation schedules. To improve efficiency and to cut costs, the FM department notifies meeting organizers of pending reservations via email/text messaging a day before, and requests them to cancel the reservation if the meeting will not be held or is postponed.

The meeting organizers check their email or SMS and respond appropriately.

Notifications are handy in informing:

- The service desk staff about late orders.
- The meeting hosts about pending reservations.
- The employees about returning borrowed assets that are overdue.
- The service desk staff whenever an emergency occurs.

- The contract managers about a specific contract.
- The visitors about parking spaces reserved for them, parking lot access codes and other details required for their visit.

The notification recipients should check for alerts regularly in order to take appropriate action.

For example, a service engineer could receive a text message about a high-priority malfunction to be fixed within two hours.

A notification recipient can be a user group (all members), an account, a person, a team, an email address or a phone number. Messages, including SMS, are sent to an email address specified for a user or an account.

Notifications have two statuses: **Active** and **Inactive**. A notification is triggered when the status is changed to **Active**.

Notifications are based on mail merge reports configured in the TSI of the business object for which the alert is to be created.

If you want to create an alert on contracts ending this month, the mail merge report must be created on the **Contracts** business object.

## Notification definition

The general properties of a notification comprising a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

The notification definitions are added and maintained at Alerts > Notification definitions.

## Notify once definition

The general properties of the **Notify once definition** comprise a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked. The notification will only be sent once. To avoid unwanted email traffic, notification of subsequent matches of the condition will be skipped.

- If you delete and recreate the **Notify once definition**, the items for which a notification was already sent will be notified again.
- If you change the condition filter or choose another condition for the same business object definition, the items for which a notification is sent will not be notified again.
- If you change the condition to another business object definition, (Reservations first and then Persons) you will get all new matching items.

The **Notify once definitions** are added and maintained at Alerts > Notify once definitions.




## Run account

The user account that is used to run alert definitions. It is a good practice to have a separate account that runs the notifications/alarm.

By using a special account:

- You can place it in its own user group and apply authorization.
- You will not need to reconfigure definitions once the "owner" of an alert definition leaves your company or organization.

You can specify this account in the **User running the alert** field that is available on all alert definitions.

 For existing alert definitions, we recommend to only make this field available if you are changing the run account of existing alerts. When you are finished changing, remove it from the layouts and/or function profiles.


We also recommend to authorize alert definitions and to make this field editable only by a select number of accounts.

## Task

A task can be created either for inserting or updating a business object instance.

Tasks are performed when they are picked up by an event based notification definition and are run by the notification engine in combination with the scheduler.


For information, refer to [Event-based notification definition](#) and [Adding an event-based notification definition](#).

 For more information on scheduling tasks, see [Scheduled tasks](#) (System settings).

## Event-based notification definition

A notification that is generated when an event or an action has occurred on a business object.

An event-based notification definition is useful when the user would like to notify other users about the status change of a business object such as Order, Contract, Person etc. The notifications are created as tasks at the **Tasks** level.

 In order to be able to create an event-based notification definition, the selected user-defined business object must have status transitions.

An event-based notification definition scans tasks and creates jobs which are then performed by the scheduler. The notification definition also defines a schedule that determines how often and when the condition is checked.

For more information on how tasks are created, refer to [Task](#).

There are two ways for creating tasks:

- By using a solution extension - must be created and deployed on the business object on which the event-based notification is set. For more information, see [Adding Extensions](#) (Field definer).
- By linking your business object's status transition to your notification definition. For more information, see [Creating notifications on status transitions](#).

[Creating notifications on status transitions](#)

[Adding a notification definition](#)

## A quick view of the various notification types

Notification type	When to use?	Advantages	Limitations
Notification	Notify about all the items that satisfy the conditions of the filter at every scheduler run.  Example: Service Desk manager wants to be notified about all the reservations and their current statuses.	Simple way to send notifications based on a generic filter.	- Search is run on the entire business object every time.  - Time related macros cannot be used in filters.  - User cannot send notifications based on events within a scheduled time.
Notify only once	Notify about a condition only once and never again. Example: User needs to be notified on a particular	Runs only once and avoids unwanted email traffic.	- This is not implemented at the order level but at the notification definition level. Consequently, if an exception occurs, the


A quick view of the various notification types


Notification type	When to use?	Advantages	Limitations
Event based notification	<p>contract when it reaches 'X' days before its end date.</p> <p>Notify when an event or action has occurred.</p> <p>Example: User wants to send emails with respect to a status change or field change in the application depending upon the solution extension created.</p> <p>Example: Service Desk manager wants to be notified about all reservations which are administratively completed. The solution extension is triggered during the status change of the BO.</p> <p>See also: <a href="#">Creating</a></p>	<p>successful notifications are also sent again.</p> <p>- When the scheduler engine is disrupted during its run or fails to work, there is no queue maintained for the notifications that were to be sent at that point of time.</p> <p>-</p> <p>- No scan is required on the entire BO but only on those instances which are present as Tasks.</p> <p>- Works also when the system is down for a while. Example: contracts that need to be notified 10 days before the completion. Even if the system is not running at that moment, the task based notifications will be sent.</p> <p>- Any disruption</p>	

Notification type	When use?	to	Advantages	Limitations
	<a href="#">notifications on status transitions</a>		of the scheduler engine does not lose the tasks that still have to be performed.	

## Alarm

A signal that alerts the user about events such as due dates, appointments, reservations, orders that need to be closed, emergencies, and so on.

The **Alarm**  button appears on the Planon ProCenter toolbar whenever an alarm is triggered. On clicking this button, the user is redirected to the [My alarms](#) selection step configured in System Settings > Alerts .

 When no alarms are ringing or when they are in snooze, the **Alarm** button on the Planon toolbar is unavailable.

On the **My alarms** selection step, you can select an alarm and navigate to the TSI that triggered it.

Alarms may be added either for:

- Individual users, for example: all new orders for 'Rick Roberts' or 'Adam Phillips'.
- A group of users: new catering requests for all catering staff.

Alarms may be added to particular elements, such as orders or contracts. You can add, prioritize, enable, modify, delete, forward, and also snooze alarms.

[My alarms](#)

## Alarm definition

The general properties of an alarm comprising a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

In [Alerts](#) , alarm definitions are added and maintained at Alerts > Alarm definitions.

[My alarms](#)

## Action definitions

The general properties of an action comprising a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

In Planon ProCenter users can automatically perform actions based on a schedule.

In Alerts action definitions are added and maintained at Alerts > Action definitions.

## My alarms

A location in Planon ProCenter where users can view pending items requiring their attention.

Users can assess their pending alarm items by viewing them on the My alarms selection **My alerts** step. On this step, they can directly navigate to the element requiring attention via the **Show results** action, snooze the alarm, or forward the item to someone else.

[Alarm](#)

[Alarm definition](#)

## Schedule

A time schedule that defines how often the filter specified in a **notification** or **alarm definition** is checked and over what period of time.

A schedule allows you to specify the frequency with which the conditions are scanned for notifications to be sent. You must assign a **Start date-time** to a notification, which will ensure that it runs from that date onwards. You can set a notification or alarm status to **Inactive** when you do not want it to run.

*Example*


A catering department typically uses a schedule with a frequency of 30 minutes to alert its staff of catering requests. However, during the month of July when business is slow, they switch to another schedule at a frequency of 4 hours.

## Scheduler

A built-in tool that runs system tasks that are scheduled by the user. A system task is a task that is scheduled and performed by Planon ProCenter at the set time.

The scheduler processes notification and alarm tasks scheduled by the user at regular intervals. It is available in **System Settings**. In the scheduler (**System Settings > Scheduled tasks**) you can view the system tasks that exist in Planon ProCenter , and you can set the time interval at which they are run.

The time interval of the scheduler is specified in System Settings > Scheduled tasks.

 • The scheduler uses the system date as reference date.

• If you are working in a multi-time zone situation and the server and clients run in different time zones, the notifications will be offset once you switch from winter time to summer time. If, for example the server runs in a UTC time zone (not taking into account daylight savings), the first time an alert is run, the start date time is translated to the UTC time for the scheduler. After that the scheduler runs server side in the server's time zone.


In addition to the time interval specified here, there is also a time interval specified at the notifications/alarm definition level. The following table outlines which interval setting becomes effective in which situation:


	Time interval	
	Notification-/ Alarm definitions level	Scheduled tasks level
Every 5 minutes	Once per day	Once per day
Every other day	Once per day	Every other day


Tasks are handled according to their type:

**Notifications**

For notifications, an email is sent to each user who must be informed. The email content is based on the selected mail merge template.

 It is possible to use expressions in the **Email subject** field of the mail merge report that is linked to the notification. With an expression you can specify a *dynamic* email subject. Example: a notification's mail merge settings on orders could include an expression that adjusts the number of days an order is overdue in the email's subject, per notification. See [Creating a dynamic email subject using expressions](#) for an example.

 If the **Email subject** field is not populated, the name of the notification definition is used. If this is not populated either, the code of the notification definition is used.





 For more information on working with mail merge templates, see [Creating a mail merge definition and a template file](#) (Reports). .

**Alarms**

For alarms, when the task returns an active alarm (ringing), an alarm status is created for each user linked to the alarm definition. When an alarm is no longer ringing it is removed from the **My alarms** selection step

### Actions

For actions, a task is performed in a scheduled interval of time. A task could be anything such as the execution of the CAD Import and the renewal of Contracts. These actions are automatically performed by the system at a specified time.

 If the <b>Email subject</b> field is not populated, the name of the notification definition is used. If this is not populated either, the code of the notification definition is used.
 For more information, see <a href="#">Creating a mail merge definition and a template file</a> (Reports).
 Alerts are run based on the user who created the definition. If you have an overloaded scheduler, you can do one of the following: <ul style="list-style-type: none"><li>• Decrease the number of notifications.</li><li>• Increase the interval of the notifications.</li><li>• Increase the MaxConcurrentJobs in scheduler settings.</li></ul>
 For more information on MaxConcurrentJobs or Scheduler settings, see <a href="#">Additional scheduler settings</a> (Administrator's Guide).

# Working with Alerts

This section describes the processes and tasks that can be performed using the Alerts TSI.

See the links below for more information:

- [Adding a notification definition](#)
- [Emailing notifications via a recipients report](#)
- [Creating a task solution extension](#)
- [Adding an event-based notification definition](#)
- [Adding a notify once definition](#)
- [Adding an alarm definition](#)
- [Sending alarms via a recipients report](#)
- [Forwarding alarms](#)
- [Adding an action definition](#)
- [Specifying a response mail](#)
- [Copying a notification or alarm definition](#)
- [Deleting a notification or alarm definition](#)
- [Linking users or user groups](#)
- [Working with My alarms](#)

## Adding a notification definition

Allows you to specify the conditions for sending notifications via email or SMS.

### Prerequisite

- Ensure you create a mail merge report for the business object for which you want to create a notification.
- The mail merge report must exist in a location available to the scheduler.  
This excludes mapped drives, because the scheduler is run by the application server service which cannot access mapped drives.
- When specifying the location of the template, specify a relative path instead of an absolute path.
- Currently, only HTML mail merge templates are supported.



- Mail merge reports can also be sent as an attachment in .doc/.docx format or as a PDF along with the e-mail.
- To display images in your notification mail, include an image reference in your HTML template pointing to the location of the image.
- If the image is located in the same folder as the template, do not precede the image name with a forward slash.

#### Example

```

```



For details on creating mail merge reports, refer to *Report Manager > Creating mail merge report definitions*.

### Procedure

1. Go to Notification definitions. On the action panel, click Add.
2. In the data section, complete the relevant fields.
3. For a description of these fields, refer to Notification definition fields.
4. Click Save. Your notification definition is now added.

In order to use the notification definition, you must set its status to **Active**.

A notification report is generated in the language set for the user who created the notification.

For example, if the user account language is set as English, the report will be generated in English.

Notifications are sent from this account to the users linked to the notification definition. All notifications are sent via email.



For more information on linking users or user groups, refer to [Linking users or user groups](#).

When the notification definition is processed by the scheduler (**System Settings > System jobs**), and the condition is met, the scheduler sends an email to the users linked to this definition.

[Creating notifications on status transitions](#)

[Event-based notification definition](#)

## Creating a recipient's report

A recipient report can be used for a notification definition (to send emails) and for alarm definitions (alarm in Planon). By creating a recipients report, you can directly notify a user related to the issue.

The procedure to create a recipients report is explained through the following example. Here, **internal coordinators** are to be notified of high-priority orders.

## Procedure

1. Go to the Orders TSI.
2. Create a report on the Orders business object. The report must contain the System code field.
3. In the System code field, select the Alternative column text check box and in the Column text field, enter the value as ID.

**ID - Specify the SysCode of the business object on which you want to be notified (the business object for which you specified a condition earlier).**

 Note that you cannot use an expression for the **ID** field as this will not work.

4. For *notification definition*, to send an email, select the Internal coordinator's email address field, select the Alternative column text check box and in the Column text field, enter the value as To. The To field picks up the recipients' email addresses.

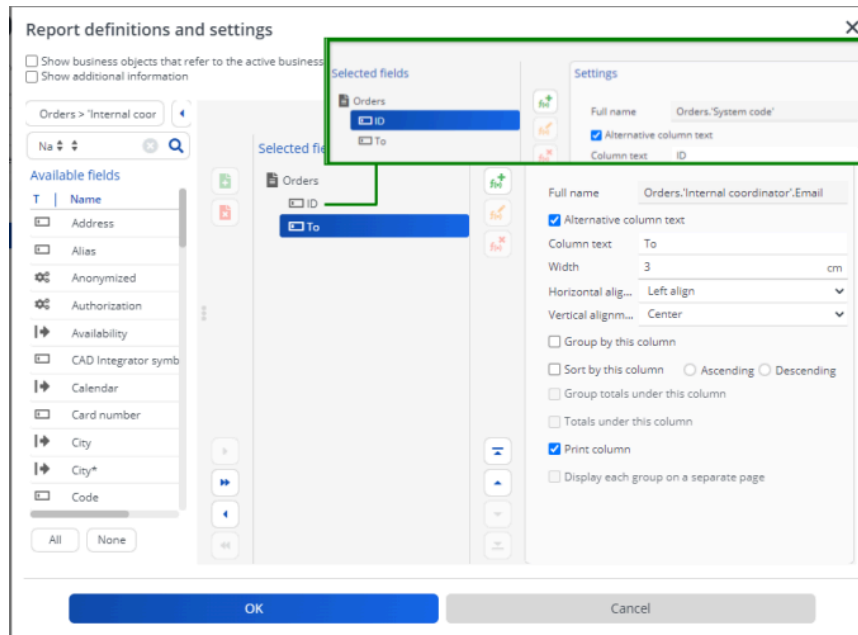
**For *alarms definition*, select the User field (Account), select the Alternative column text check box and in the Column text field, enter the value as To.**

**To** is the user's SysCode (Account.SysCode). For example, the report must contain the person reference linked to the user account (Orders > 'Internal coordinator' > 'Persons linked to user accounts'|Person > User > System code).

To select the person reference, select the check box **Show business objects that refer to the active business object**.

 The **ID** and **To** column names are case sensitive.

The following image shows the report definition to send email notification.



5. Specify a name for the new report.
6. Click OK.

You have now created a recipients report which can be used for sending alarms and email notifications to the appropriate recipients.

## Creating a recipients report for different recipients

In Outlook, if a person is set up as a delegate for another person's calendar, they can create a reservation on behalf of that individual.

Within Planon, the **BookedBy** is the individual who created the reservation and the **Requestor** is the individual who delegated access.

If you want to make sure that both the **Requestor** and the **BookedBy** person receive communication about the reservation, you can do this by adding both fields to the **To** field in the recipient report.

### Procedure

1. Create a recipient report as described in Creating a recipient's report.



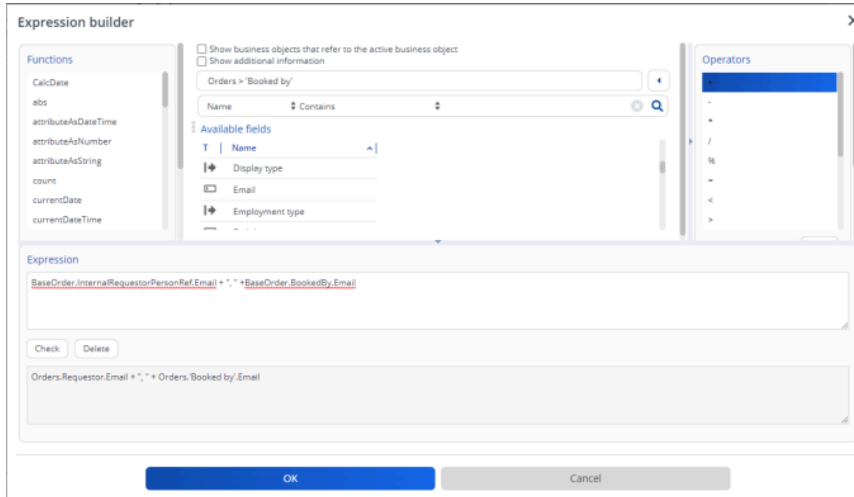
Note that you cannot use an expression for the **ID** field as this will not work.

2. For the **To** field, instead of selecting a field and adding it from Available to Selected fields, click Add expression

**Expression builder is displayed.**

3. Add the expression: *BaseOrder.InternalRequestorPersonRef.Email + ", " + BaseOrder.BookingBy.Email -* as shown in the following image:

You can add fields and operators by clicking them, or you can type the expression in the Expression box.



4. Click OK and select the Alternative column text check box and in the Column text field, enter the value as To.
5. Specify a name for the new report.
6. Click OK.

You have created a recipients report which can be used for sending alarms and email notifications to the appropriate recipients.

## Emailing notifications via a recipients report

By linking users to a notification definition, you limit emailing notifications to accounts in Planon ProCenter . By specifying a recipients report, you can extend this functionality to people that do not have a Planon ProCenter account.

### Prerequisites

### Procedure

1. Create a recipients report as described earlier in Creating a recipient's report.
2. Go to Personnel , specify valid email address(es) of your internal coordinators, so that notifications will be sent to these email address(es).

**If your phone provider supports the service, the email can be routed to the recipient's phone number at the provider. Your expression must look like the example below:**

```
Orders.'User code'.Telephone + "@provider.com" +  
Orders.'Contact person issuer'.Telephone number' +  
"@provider.com"
```

Instead of “@provider.com” type in your actual provider’s email address, to route this email as a text message to the recipient’s phone. By using the above expression, you can also route the message to multiple recipients. For multiple recipients, the expression must look like the example given below:

```
Orders.'Internal coordinator'.Email' + "," +  
Orders.'Internal tradesperson'.Email'. You can also  
add direct emails addresses of personnel in the following  
manner: "Adam.weasly" + "@" + "planonsoftware.com".
```



For more information on constructing expressions, refer to *Reports*.

3. In the notification definition, select the report in the Recipients > report field.

When the scheduled task is run and the condition results in a list of items, the recipients report is run against this list. The scheduler sends a notification email to the person corresponding to the item in the list.

An email is sent per matching item.



When using DTAP as described in the [Administrator's Guide](#), and when using a non-production environment, mails will be routed to Log viewer.

## Sending alarms via a recipients report

By specifying a recipients report, you can directly notify a user related to the issue of a specific alarm.

1. Create a recipients report as described earlier in *Creating a recipient's report*.
2. In the alarm definition, select this report in the Recipients report field.

If the scheduled task is run and the condition results in a list of items, the recipients report is run against this list. The scheduler then creates an alarm for each user corresponding to the item in the list.

When the user affected logs in, the **Alert** button will be displayed on the Planon toolbar, so that the user can go to **My alarms** to view the ringing alarms.

## Use recipient related filtering

In the application, an alarm status is created when a filter condition and the recipient report condition is met.

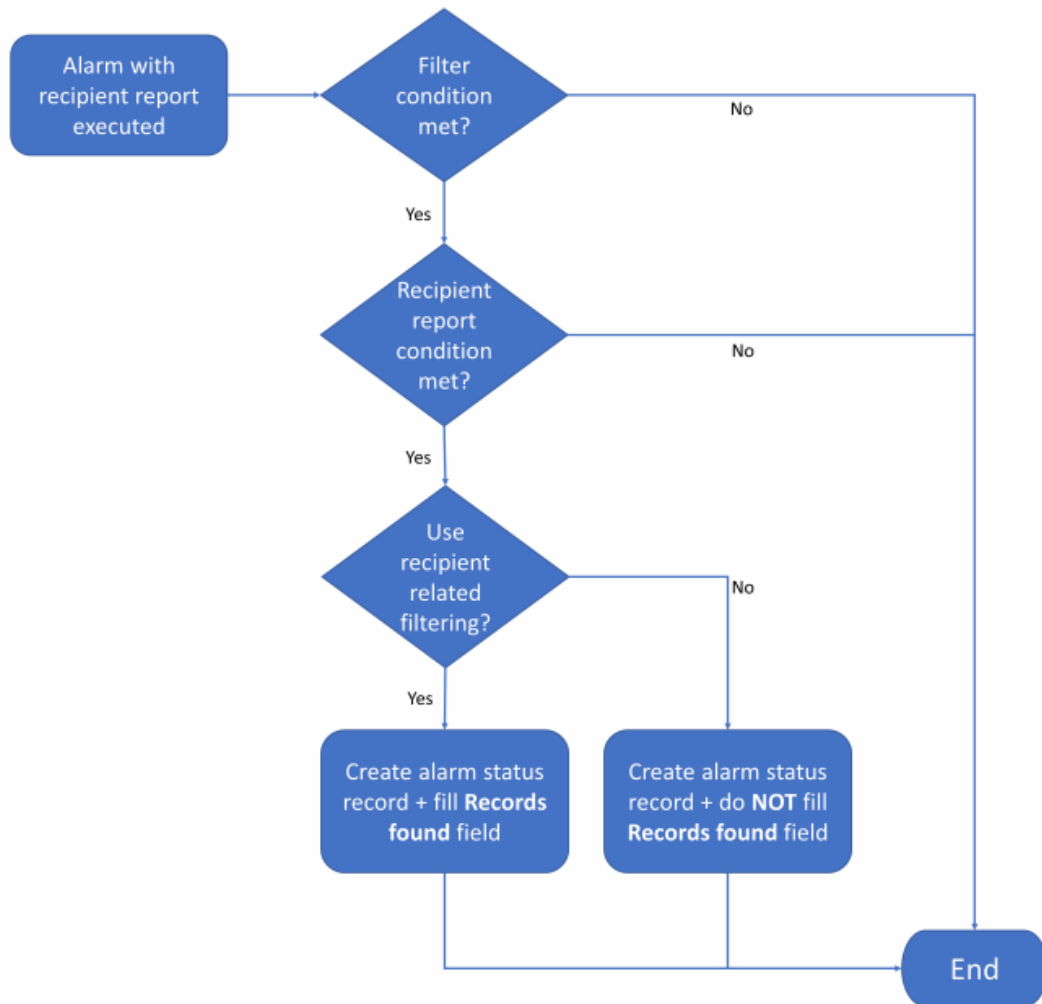
In the **Records found** field the primary keys of the records that meet the recipient report condition are stored.

When jumping to the configured TSI, only those records are displayed that meet the filter condition **and** the recipient report condition.

Consequently, there can be a difference in the number of alarms shown in the application and the number of records displayed in the TSI.

To overcome this discrepancy, you can enable **Use recipient related filtering**. When this field is set to **Yes**, this discrepancy is lifted.

The following image illustrates how the process works.



- When **Use recipient related filtering** is enabled, you can no longer link a user or a user group to the alert (because it would be unclear which records are to be shown).
- The **Use recipient related filtering** field can only be used if the **Recipients report** field is filled in.

## Creating a dynamic email subject using expressions

### Procedure

In order to make an email's subject dynamic, you can use an expression in the **Email subject** field of the mail merge template that is linked to a notification definition. In the following example procedure, the internal tradespeople are to be notified of overdue orders. If the number of days an order is overdue is 10 at the moment of sending the notification, the email subject will reflect that, thanks to the expression. If, at another time or for a different tradesperson, the number of days the order is overdue is 5, the email subject will reflect that number.

1. In Alerts Management, at Alerts Notification definitions, create a notification definition with a code (01) and description (Overdue orders).
2. Make sure that the linked Alert condition includes a filter in which the Requested end date-time of the order is `<&startofday`.



See the *Alerts* user documentation for information on creating and activating notification definitions.

3. Go to Service Manager.
4. Go to the Work orders selection level.
5. On the action panel select Report.
6. Create a mail-merge definition that includes the order fields Number and Requested end date-time.
7. In the mail-merge Settings pane, add an expression in the Email subject field.



See the *Report Manager* user documentation for information on creating mail merge report definitions and mail merge templates.

**This expression could be like the following example:**

```
"Order " + Orders.Number + " is " + numToString(abs(extractDay(currentDate() ) -  
extractDay(Orders.'Requested completion date') )) + " days late."
```

The emails that are sent based on the above notification definition and report definition, will have a dynamic email subject: 'Order [OrderNumber] is [x] days late'. If no expression is used the email subject will consist of the **Code** and **Description** of the notification definition.


# Creating a task solution extension

Tasks are created using a solution extension on any business object.

## Prerequisites

- Register a solution extension in Business processes > SX Configuration.
- Add the solution extension to the business object for which you want to create the notification definition in Field Definer. For example, business object **Orders**.
- An example solution extension:  
`nl.planon.hades.userextension.examples.TaskBOCreator`  
For more information, refer to [Creating a task solution extension](#).

The solution extension is triggered during the status change when a business object creates a [Task](#).

 A sample solution extension (source code) is supplied in the install set (..\manual installation resources\planon software development kit\UserExtension\examples).

For example, create a task on the **Orders** business object, to notify the user about all the orders that change to 'Administratively completed' status. To create this task, add the following solution extension along with the parameter mentioned below in **Field Definer > Orders > Details > Extensions**.


For more information on the concept of an event-based notification definition, refer to *Event-based notification definition*.


### Solution extension:

`nl.planon.hades.userextension.examples.TaskBOCreator`

Parameter: `UsrAdministrativelyCompleted`.

The **Parameter** field contains the system name of the business object status.

 Note that the solution extension must be first registered in Business processes > SX Configuration. The solution extension must then be added to the business object on which the task must be scheduled.

 For information on registering and using solution extensions, refer to *Field Definer*.

### Information displayed when a task is created:

- A task has a reference to the action it must execute along with the reference to the notification definition.

For a description of these fields, refer to [Task fields](#).

### Each task undergoes the following five statuses:



- **To do** - default status.
- **In progress** – task is picked up.
- **Notified** – if the notification definition for the task returns a business object instance.
- **Executed** - if the notification definition for the task does not return a business object instance and no user is notified.
- **Executed with errors** - task was executed, but an exception occurred in the application that stopped the notification to be sent.

## Deleting (cleaning up) tasks

You can delete only those tasks that are either in the **Notified** or **Executed** status and are more than one month old by setting the scheduler settings.

- You can delete a task manually.
- You can also activate a system task that will delete all the tasks that are in the *Executed* or *Notified* status.
- The system task to clear the tasks is scheduled to run daily.

See: [SYSTASK\\_CLEANER](#)(System Settings > Scheduled tasks).



The default schedule setting for deleting a task is 7 days from the date and time the task was completed.

## Adding an event-based notification definition

An event-based notification definition is almost similar to a general notification definition, except that it is based on an event or task and is triggered by a solution extension.

### Procedure

1. Go to Event-based notification definitions.
2. On the action panel, click Add.

The procedure to add an Event-based notification definition is the same as adding a regular notification definition.

Perform the steps as described in [Adding a notification definition](#).



In order to be able to create an event-based notification definition, the selected user-defined business object must have status transitions.

On the **Tasks** step, a task is created by the solution extension which triggers the email/sms to be sent to the user.

For more information, refer to *Task*.

The task thus created, is picked by the Scheduler via the event-based notification and the emails/sms is sent whenever the event defined in the notification definition occurs.

## Creating notifications on status transitions

In organizations/companies dealing with a great number of orders there is a need to be notified when the status of an order is changed. This helps keeping track of progress and can be used to trigger actions.

It is now possible to create such notifications directly on the status transitions by using event-based notifications.

### Procedure

1. Create an event-based notification.

**Complete the required fields. For more information, see [Adding a notification definition](#).**

2. Create a filter to specify an event.
3. Link a mail template and attach a recipients report (or link a user group or user).
4. Specify a schedule and a start date-time and save the definition.

 Do not yet activate the definition.

5. Go to **Field definer** and select the business object for which you want to create a notification on a status transition.

 Select the user-defined business object, not the main business object.

6. Go to Details > Status transitions select a status transition for which you want to create a notification.
7. On the action panel, click Link notifications, select your event-based notification (Step 1) move it to In use and click OK.

**It will now appear under Linked notifications.**

- You can link up to 10 event-based definitions to a status transition.
  - You can link up to 20 status transitions to an event-based definition.
  - You can only configure this link in **Field definer** and not in **Alerts** because the application's cache needs to be updated after completing configuration.
8. Go back to **Alerts** and select your event-based notification and activate it.

**A task is created on Tasks level.**

Now, if the type of order for which the event-based notification has been created changes status in accordance with the status transition you have defined and the filter

condition is met, the notification will be sent to the persons linked to the event-based notification or its recipient report.

The task created in Alerts will automatically be removed once the notification has been generated.

[Notifications on status transition - Video example](#)

[Adding a notification definition](#)

[Event-based notification definition](#)

## Notifications on status transition - Video example

The following video shows how to create notifications on status transitions.



The video is available online on our Planon Software channel, it is called: [Event-based notifications](#).

[Creating notifications on status transitions](#)

## Adding a notify once definition

Allows you to specify the conditions for sending notifications only once via email or SMS.

However, contrary to the regular notification definitions, when the condition continues to be met, Planon ProCenter checks whether a notification on this specific item has already been sent. If **Yes**, the subsequent notifications will be skipped.

### Procedure

1. Go to Notify once definitions.
2. On the action panel, click Add.

The procedure to add the **Notify once definition** is the same as adding a regular notification definition.

Perform the steps as described in Adding a notification definition.

3. The recipient linked to the definition will receive a notification per matching item. If multiple items are found, this will result in an equal number of emails.
4. If you discard a Notify once definition, the corresponding list of notifications will also be purged (and these can subsequently be re-notified).

## Adding an alarm definition

Allows you to specify the alarm conditions for alerting the Planon ProCenter users.

### Procedure

1. Go to Alarm definitions.
2. Click Add on the action panel.
3. In the data panel, complete the relevant fields.

For a description of these fields, refer to *Alarm definition fields*.

4. Click Save, your alarm definition is added.

To use the alarm definition, set its status to **Active**.

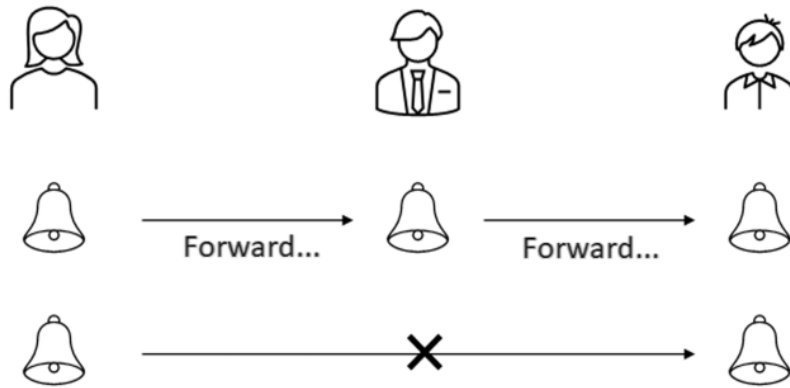
## Forwarding alarms

Users linked to an alarm definition can specify a forwarding account so that, for example, during their absence, alarms are redirected to another user.

### Procedure

1. On the action panel, click Forward. The Forward alarm to dialog box appears.
2. Specify a forwarding account and click OK.  
The user specified will then also receive and be able to take action on an alarm in the absence of the alarm definition owner.  
You can change/undo forwarding and also forward the alarm to another user.

If the user to whom the alarm is forwarded, forwards the item to yet another user, the item will disappear from his or her **My alarms** step, as shown in the following picture:



Only the alarm definition owner and the person to whom the alarm is forwarded will be able to view the actual alarms.

## Adding an action definition

An action definition is used to perform an action when a specified condition is met, such as importing CAD data.

For more information, see:

- [Adding an action definition](#)
- [Action definition - business objects](#)
- [Recommended configuration](#)

## Adding an action definition

Take the following steps to add an action definition.

### Procedure

1. Go to Action definitions. On the action panel, click Add.
2. In the data panel, complete the relevant fields.

**For a description of these fields, refer to [Action definition fields](#).**

3. Click Save.

**i** In order to use the action definition, set the status to **Active**. If action definitions have the status **Scheduled**, it can be configured in the **Scheduled tasks** TSI on **SYSACTIONS** by setting the schedule occurrences time.

**You have now created an action definition.**

## Action definition - business objects

List of business objects for which action definitions can be defined:

<b>Business Object</b>	<b>Action - System name</b>	<b>Action - translated name</b>
Aggregation definition	All available status transitions	
Aggregation definition	All available status transitions	
CAD import definitions	BomExecuteCADImport	Run CAD import
Contracts	BomAutomaticRenew	Automatic renew
	BomRecalculateFinCommitment	Recalculate fin. commitments
	BomUpdateTerminationDate	Update termination date
	BomCloseAmount	Close fin. data
	BomTestCloseAmount	Fin. trial close
	BomTestCloseAmountFrozen	Fin. trial close & freeze
Distribution Points	BomReplenishStock	Replenish stock
Exchange appointments	BomSynchronizeAppointment	Synchronize appointment
Exchange mailboxes	BomSynchronizeFromExchange	Synchronize Exchange --> Planon
	BomSynchronize	Synchronize Planon --> Exchange
Gauge reading per day	BomCalculate	Calculate
Import-export definitions	BOMExecute	Run

<b>Business Object</b>	<b>Action - System name</b>	<b>Action - translated name</b>
Import-export documents	BomDeleteExpiredLogs	Delete expired logs
Journal entry	BomDeepArchive	Deep archive
Measurement points	BomSummarizeReadings	Summarize readings
Reservations	BomBookingUtilizedNoShow	No show
<div style="border: 1px solid blue; padding: 5px; display: inline-block;"> <p>For this action definition to work, the filter should be filled in with a condition that is always true, e.g. <b>Code contains a value</b>).</p> </div>		
All applicable business objects	BomDelete	Delete
All applicable business objects	BomArchive	Transfer to archive

## Recommended configuration

### Prerequisites for action definitions

Executing an action definition is like performing an action on a (list) of business objects. Actions can sometimes only be executed when some conditions are met. In the **Alert condition** filter linked to an action definition, business objects that do not meet these conditions should be excluded.

Despite that if you do not exclude business objects on which the action cannot be executed because of specific ruling, the action definition will still work properly. However, for each business object that does not fulfill the rule, an error message will be logged, informing that the action could not be carried out.

### Example

When archiving orders, orders that are already archived should be excluded. In addition, the order status of the order should be **Cancelled** or **Administratively completed**. To exclude the archived orders, add the following filter to the alert condition:

<b>Field name</b>	<b>Filter operator</b>	<b>Value</b>
Transferred to archive	=	No

Field name	Filter operator	Value
Status	In	Cancelled or Administratively completed

Now, orders is in the **Cancelled** or **Administratively completed** status and that are not archived yet will now be moved to the archive.

## Specifying a response mail

To define a response mail to be sent to users or to user groups after performing a specific action such as importing CAD drawing data.



The action definition does not work for archiving visitors. Therefore, it is not possible to send a mail when archiving visitors.

### Procedure

1. Go to Action definitions.
2. In the data section, fill out all the fields. For a description of these fields, refer to Action definition fields.
3. On the action panel, click Linking users or user groups.  
For more information on linking users or user groups, refer to Linking users or user groups.
4. Based on the selected mail template, mails are sent to the users linked to an action definition to inform them about an action.

For example, the following mail is sent to the users linked to importing CAD import definition that has been executed by the scheduled task:

CAD Import Scheduler	
Dear user,	
CAD import definition Imp12853 is executed successfully by the scheduled task.	
Code	: Imp12853
Log message	: Start date-time of import: Tuesday, August 10, 2021, 15:57 End date-time of import: Tuesday, August 10, 2021, 15:57 No. of drawings to be imported: 1
Executed	: Tuesday, August 10, 2021, 15:57
Import log date	: Tuesday, August 10, 2021, 15:57
Sincerely,	
CAD Import Scheduler	



5. You have now completed specifying a response mail.

## Copying a notification or alarm definition

To save time by reusing existing notification or alarm definitions. After copying a notification definition, you can amend the conditions or schedule.

### Procedure

1. Go to Notification definitions or Alarm definitions.
2. Select the notification definition or alarm definition you want to copy.
3. On the action panel, click Copy. A duplicate of the selected notification or alarm is created. You can now amend the definition as required.



When copying a definition, Planon ProCenter will prompt an error message about the start date-time. Click **Cancel** to ignore this error and complete the definition.

## Deleting a notification or alarm definition

To maintain a list of up-to-date definitions by deleting unwanted or obsolete notification or alarm definitions.

### Procedure

1. Go to Alarm definitions or Notification definitions.
2. Select the notification definition or alarm definition you want to delete.
3. On the action panel, click Delete. The selected notification definition or alarm definition is now deleted.

## Linking users or user groups

To link users or user groups to a notification definition or an alarm definition, in order to send email (via a mail-merge report) to these linked users (or to the users of the selected user groups).

### Prerequisite

User groups must be configured in **Authorization**.



For notify-once definitions, to be able to send email to the linked users (or to the users of the selected user groups), the field **Sender's email address** on the *user settings* (*Authorization*) must be filled. If no email addresses are specified for these users / user groups, the email addresses of the *persons* ( *Personnel* ) linked to the user accounts are considered to send the email.



For information on user groups and users, refer to *Authorization*.

### Procedure

1. Go to Alarm definitions or Notification definitions.
2. Select the notification definition or alarm definition that you want to link to a user/user group.
3. On the action panel, click Link users/user groups.

**The selected notification definition or alarm definition is now linked. For more information on the notification definition's fields, see [Notification definition fields](#).**

## Stopping accounts receiving notifications

To prevent sending notifications to ghost accounts, future or terminated accounts are excluded from being notified.

If an account is linked to a notification, a message is sent when the condition is met. To ensure that the log is not unnecessarily burdened, messages that cannot be delivered because an account is terminated or not yet active, are filtered out.

This is also true for users linked to a user group that should receive a notification.

This feature applies to:

- Notification definitions
- Notify once definitions
- Event based notifications
- Alarm definitions
- Action definitions



This feature does not apply to accounts receiving notifications through recipient reports; the application cannot determine whether an account is terminated or not active yet based on the email address.

## Working with My alarms

To enable users to view and take action on their pending or forwarded alarms. An alarm appears in the list when an alarm condition is met.

### Procedure

1. Go to My alarms. Displays the alarms relevant to the logged in user.
2. View the alarm details in the data section.

The **User details** list displays all individuals linked to the selected alarm.

3. On the action panel, click Show results or press CTRL+J to directly navigate to the TSI requiring action.

The linked TSI is specified at the alarm definition level. For details, refer to *Adding an alarm definition*.

- It is possible to set user-defined filters to limit the alarms presented.
  - It is possible to sort the alarms by clicking on any of the column headers.
4. The alarm continues to ring until appropriate action is taken and the condition no longer applies. The item is then removed from the list next time the condition is checked.



The number of items displayed in the selected TSI selection step can differ from the initial number of items, due to:

- TSI Selection step filters, which can affect the elements list.
- Authorization, which can affect the elements list.
- Step filters defined by Planon (such as: only reservations linked to WBS items in Projects ).
- Fixed drill-down behavior.
- Items that are already addressed and no longer meet the condition.

## Forwarding alarms

It is possible to forward the alarms in **My alarms** to another user.

### Procedure

1. Select the alarm that you want to forward.
2. Click Yes, in the Forward field. If you click No, the alarm will not be forwarded.
3. In the Forward to field specify a user.
4. Click Save.

In the alarms list, an icon (  ) appears under the Forward column, indicating that the item is forwarded.

The alarm now appears under My alarms for both the alarm definition owner and for the forwarding account.


If the forwarding account forwards the alarm to yet another user, the alarm will no longer appear in his or her list.

## Snoozing alarms

The alarms in **My alarms** can be snoozed, if you need to focus on something else.

### Procedure

1. Select the alarm that you want to snooze from the list.
2. In the Snooze field, click Yes. If you click No, snooze action cannot be set.
3. In the Snooze until field, specify a snooze until date-time.
4. Click Save.

In the alarms list, an icon (  ) appears under the Snooze column, indicating that the item is snoozed.

If the snooze time window has passed and the condition still applies, the scheduler will reactivate the alarm and the Alert button on the Planon toolbar will be activated.

- If an alarm is snoozed, the **Alert** button will ignore the alarm and will remain dimmed.
- If all alarms are snoozed, the **Alert** button will not be activated.



Bear in mind the scheduler's interval setting. If an alarm is snoozed for a day and the scheduler's job interval is set to weekly, the alarm will be reactivated after running the weekly scheduler job. For more information on the scheduler's interval setting, refer to [Notification definition](#) and [Alarm definition](#).

# Next run date calculation

For definitions, the next run date is calculated based on the schedule and the start date-time specified.

The following table outlines the behavior in calculating the next run date:

Schedule	Start date-time	Next Run Date
Every hour	Today 12:15	Today 12:15 > 13:15 > 14:15 > ...
Every 6 hours	Today 12:00	Today 12:00 > 18:00 > 24:00 ...
Daily	Today 12:15	Tomorrow 12:15, day after tomorrow 12:15 ...
Weekly, on Monday and Thursday	Today Wednesday 12:15	Tomorrow 12:15, next time next Monday 12:15, next time next Thursday 12:15 ...
Every 4 weeks, on Monday	Today Wednesday 12:15	Monday 12:15, next time in 4 weeks on Monday 12:15 ...
Every first day of the month	1-July-2021 12:15	1-July at 12:15 > 1-August 12:15 ...
	3-July-2021 9:00	1-August at 9:00 > 1-September 9:00 ...
Every first day of the month, every 3 months.	1-July-2021 8:00	1-July at 8:00 > 1-October 8:00 > 1-January 8:00 ...
	3-May-2021 9:00	1-June at 9:00 > 1-September 9:00 > 1-December 9:00 ...



- The scheduler uses the system date as reference date.
- If you are working in a multi-time zone situation and the server and clients run in different time zones, the notifications will be offset once you switch from winter time to summer time. If, for example the server runs in a UTC time zone (not taking into account

daylight savings), the first time an alert is run, the start date time is translated to the UTC time for the scheduler. After that the scheduler runs server side in the server's time zone.

# Checklist for creating alarms/notifications

---

## Technical configuration (Responsibility of the Planon Administrator).

- 1 Create a trusted service for the scheduler.  
Refer to Administrator's Guide for more information.
  - 2 Deploy planonschedulereengine.ear.
  - 3 Create a Planon account for SCHEDULERENGINEADMIN.
  - 4 Provide appropriate access rights to SCHEDULERENGINEADMIN.
  - 5 Refresh the application server cache.
  - 6 Specify email settings for the SMTP server.
  - 7 Specify email account settings of staff to be notified.
  - 8 In Supporting data , add Scheduler as a trusted service.
  - 9 In **System Settings > Scheduled tasks**, set the frequency for running the task and set the task's status to Active.
- 

This completes the technical configuration, you should now be able to create alarms and notifications. For more information on technical configuration, Refer to Planon ProCenter Suite Installer.

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## Functional configuration

1. When using a mail merge report, first create a mail merge report for the business object for which you want to create an alert.  
Refer to Reporting > Creating mail merge report definitions.
2. In the mail merge report definition, use a relative path when referencing the template.  
The mail merge report must be in a location that the scheduler can access.
3. Create a definition:  
An [Alarm definition](#) if you want to be alerted in Planon ProCenter .

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## Functional configuration

A [Notification definition](#) if you want to receive notification of when a certain condition has been met. The recipients will continue to receive notifications until the condition is no longer met.

A [Notify once definition](#) if you want to receive notification of when a certain condition has been met. The notification is only sent once.

An [Action definition](#) if you want to perform a specific action.

4. Per definition, specify a:  
Condition that you want to check. In the condition, specify the:
  - Business object
  - Filter (criteria you want to check)
  - Schedule

Note that the schedule used is determined by the values you select here and in **System Settings > Scheduled tasks**.
5. When using a recipients report, create and link this report as described in the section on [Alarm](#) and [Notification](#).  
Ensure that your alert condition and the recipient report are both created for the same business object.  
Set the definition to **Active**.

---

This completes the functional configuration, you should now be able to send/receive alerts.



# Alerts - Field Descriptions

## Task fields


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Field	Description
Task business object type	The business object type that created the task. For example, <b>Reservations</b> .
Task business object code	The syscode of the BO on which the task is stored.
Notification definition code	The code filled in by the solution extension.
Planned date-time	The date and time when the task is ready to be run.
System status of business object	Stores the code and description of the <b>Tasks</b> BO system status. For example, <b>2, Notified</b> .
System code	A unique identifier for the task record.
Property set code	Indicates the property set on which the tasks are created.
Status since	Indicates the last time the task was run.
Inserted by	Stores the name of the user who added the task.
Modified by	Stores the name of the user who modified the task.
Modification date-time	Stores the date and time of the last changed status transition of the task.
Insertion date-time	Stores the insertion date and time of the task.

---

## Notification definition fields

Field	Description
Code	Enter a code number for the notification definition.
Description	Specify a meaningful name for the notification definition.
Alert condition	<p>Click the <b>Select a value</b> button to open the <b>Alert condition</b> dialog box. In this dialog box, click <b>Add</b> to select the business object for which you are creating a definition.</p> <p>Specify a code and the filter, and provide a filter name.</p> <p>For details on creating filters, refer to <a href="#">Using filters</a> (Fundamentals).</p>
Use reference date	<p>When set to <b>Yes</b>, the reference date (= current date) is taken into account when using a mail merge report or recipient report.</p> <p>For life cycle aware business objects (contracts, rentable units etc.) the reference date should always be taken into account for mail merge reports and recipient reports.</p> <p>For life cycle aware business objects, the alert condition also takes the reference date into account.</p> <p>The value of this field is not used when executing an alert condition.</p> <p>For other reference data aware business objects, the reference date is never used when the alert condition is applied.</p> <p>This setting can be used in following situation:</p> <p>When creating a notification on a business object that is not life cycle aware (for example contract actions) and this notification has a mail merge report in which fields of a lifecycle aware business object are added (for example contract.name).</p>
Attachment mail template	Click the <b>Select a value</b> button to open the <b>Mail template</b> dialog box.

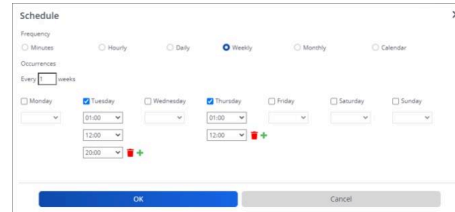
Field	Description
	<p>Select a mail merge template and click <b>OK</b>. This template is used for the attachment that is sent with an email.</p>
	<p> The mail merge templates in .doc/.docx format are only supported as an attachment.</p>
Send attachment as PDF	<p>Select <b>Yes</b> to send the mail merge report as a PDF attachment. This field is only enabled when the <b>Attachment mail template</b> field has a value. By default <b>No</b> is selected and the report is sent as .doc/.docx attachment.</p>
Mail template	<p>Click the <b>Select a value</b> button to open the <b>Mail template</b> dialog box. Select a mail merge template and click <b>OK</b>. This template will be the e-mail message's body.</p>
Sender's email address	<p>Click the <b>Select a value</b> button to open the <b>Sender's email address</b> dialog box. Specify the e-mail address to be used as sender and reply address when sending a notification mail.</p> <p>This will allow customers to have mail sent from a specific address.</p> <p>If the sender's email address is not specified, the <b>Sender's email address</b> from <a href="#">System Settings</a> is used.</p>
Reply email address	<p>Click the <b>Select a value</b> button to open the <b>Reply email address</b> dialog box. Specify the e-mail address to be used as reply address when sending a notification mail.</p> <p>If the <b>Reply email address</b> is not specified, the Reply email address from <a href="#">System Settings</a> is used.</p>
Recipients report	<p>Click the <b>Select a value</b> button to open the <b>Recipients report</b> dialog box. Select a report in order to run it against the condition. When processed by the scheduler, this will result in a list of recipients to be notified via email.</p>

Field	Description
Schedule	<div data-bbox="774 247 1344 369" style="border: 1px solid black; padding: 5px;"> <p> The alert condition and the recipient report should both be created on the same business object.</p> </div> <div data-bbox="774 373 1344 457" style="border: 1px solid black; padding: 5px;"> <p> For more information, refer to <a href="#">Emailing notifications via a recipients report</a>.</p> </div> <p>Click the <b>Select a value</b> button to open the <b>Schedule</b> dialog box. Enter the frequency and the pattern for sending notifications.</p> <p>You can select: <b>Minutes</b>, <b>Hourly</b>, <b>Weekly</b>, <b>Monthly</b> or <b>Calendar</b>.</p> <p>If you select <b>Weekly</b>, you can specify a the schedule time per day - select the day's check box and choose a time from the list.</p> <ul style="list-style-type: none"> <li>• The list only shows whole hours and you must use the list (cannot type in the field).</li> <li>• Click the plus icon to add additional schedule times.</li> <li>• The order of scheduled times is not important, the application will sort them in the correct order.</li> <li>• You can schedule a maximum of 5 times per day.</li> <li>• Click the bin icon to remove a schedule time. Only the last schedule time will have a bin icon.</li> <li>• If no time is specified, the</li> </ul>

---

**Field****Description**

schedule will be based on the start date-time of the alert/notification.



1 Select **Calendar** if you want to send the notification on specific dates. You can select the required dates by clicking them in the calendar while holding down the CTRL key.

**Start date-time**

Specify the start date and time for checking the notification condition. The date-time specified is time-zone-aware, which means that the start date-time is based on the time zone of the user who created the notification definition.

**Example**

The start date-time (Monday, July 27, 2009 12:00 PM) is based on the user's time zone (GMT +01). The schedule will start at 6:00 locally because the server is based in Boston, US (EST) and there is a 6 hour time zone offset.

The initial start date-time is used to calculate the next start date-time.

See also [Next run date calculation](#).

**Last result**

Displays the definition's current status, which is either **OK** or **Failed**. If the scheduler encounters an error when checking a notification / an alarm condition, the **Last result** field is updated accordingly.


Refer to Supporting data > Log Viewer for a list of all errors encountered by the scheduler.

Field	Description
Next run date	<p>Indicates the next date for the scheduler to check the notification condition. This field is automatically updated so that the user can see when the next check is scheduled.</p> <p>For more information, refer to <a href="#">Next run date calculation</a>.</p>
Log successful alerts	<p>Click <b>Yes</b> if you want to receive a detailed list of items that meet the condition. This list is published in Supporting data &gt; Log viewer.</p> <p>The <b>Source</b> column will display the definition's code.</p> <p>The <b>User</b> column will display "SCHEDULERENGINEADMIN".</p>
Log to communication log	<p>Click <b>Yes</b> if you want to log a communication log created for the item being notified on. When you enable this field, fill the <b>Communication log</b> field to identify which communication log must be created. This logging can be used only for business objects which are communication log aware.</p> <p>The following fields of the communication log will be populated by default:</p> <p><b>BeginDate:</b> Time of alerting.</p> <p><b>Code:</b> Alert definition code.</p> <p><b>Name:</b> Alert definition description.</p> <p><b>Comment:</b> Will be extended with a list (comma separated values) of the user codes or email addresses of the people that are alerted.</p>
Communication log	<p>Select the communication log type used for the notification logging.</p> <p>Click the <b>Select a value</b> button to open the <b>Communication log</b> dialog box. Select a business object and click <b>OK</b>.</p> <p>When the <b>Log to Communication log</b> is set to <b>Yes</b>, an instance of the communication log type is created.</p>



Field	Description
Store mail attachment?	<p>In <b>Field Definer</b> you can create user types for communication logs (for example: telephone call, email and so on).</p> <p>Select <b>Yes</b> if you want to store the attachment of an email in a communication log. This field is only available if <b>Yes</b> is selected in the <b>Log to communication log</b> field.</p> <p>After you have sent the email, a communication log record is created and the attachment is stored at the secure document location. The name of the attachment is displayed in the <b>Document (secure)</b> field at <b>Order details &gt; Communication logs - Order</b>.</p>
User running the alert	<p>Specify the user whose account will be used to run the alert definition. By default, this field will be populated with the name of the user who created the alert definition.</p> <p>We recommend that all alert definitions are run by a special user/account and not the personal account of a Planon administrator. See also <a href="#">Run account</a>.</p>
Report	<p>Select the report defined on the business object for which you are creating a notification definition.</p>

## Alarm definition fields

Field	Description
Code	Enter a code number for the alarm definition.
Description	Specify a meaningful name for the alarm definition.
Alert condition	Click the <b>Select a value</b> button to open the <b>Alert condition</b> dialog box. In this dialog box, click <b>Add</b> to select

Field	Description
	<p>the business object for which you are creating a definition.</p> <p>Specify a code and the filter, and provide a filter name.</p> <p>For details on creating filters, refer to <a href="#">Using filters</a> (Fundamentals).</p>
	<div style="border: 1px solid black; padding: 5px;"> <p> In the alert conditions used for alarms, do not use the &amp;Person or &amp;Account macros, because the <b>Show results</b> can give incorrect results. The &amp;person used in running the alarm may not match the person clicking <b>Show results</b>.</p> </div>
Icon	<p>Select an icon to represent the alarm status. For convenience, users can filter on icons to get a list of high priority items or a list of items of the same type (e.g. all hard-hat items representing orders).</p>
Use reference date	<p>When set to <b>Yes</b>, the reference date (= current date) is taken into account when using a mail merge report or recipient report.</p> <p>For lifecycle aware BOs (contracts, rentable units etc..) the reference date should always be taken into account for mail merge reports and recipient reports.</p> <p>For life cycle business object, the alert condition also takes the reference date into account.</p> <p>The value of this field is not used when executing an alert condition.</p> <p>For other reference data aware business objects, the reference date is never used when the alert condition is applied.</p> <p>This setting can be used in following situation:</p> <p>When creating a notification on a business object that is not life cycle aware (for example contract actions) and this notification has a mail merge report in which fields of a lifecycle</p>



Field	Description
Recipients report	<p>aware business object are added (for example contract.name).</p> <p>Specify the recipient report in order to run it against the condition. When processed by the scheduler, this will result in a list of recipients to be alerted via <b>My alarms</b>.</p> <p>The alert condition and the recipient report should both be created for the same business object.</p>
Use recipient related filtering	<div data-bbox="773 630 1328 726" style="border: 1px solid blue; padding: 5px;">  See also <a href="#">Sending alarms via a recipients report</a>.         </div> <p>When the recipient report condition is met, alarm status records are created in the application.</p> <p>When this field is set to <b>No</b>, the specified TSI selection step will only display records that meet the <i>filter condition</i>.</p> <p>When this field is set to <b>Yes</b>, the specified TSI selection step will display records that meet the <i>filter condition</i> AND the <i>recipient report condition</i>.</p>
TSI selection step	<div data-bbox="773 1176 1328 1272" style="border: 1px solid blue; padding: 5px;">  This field can only be used if the <b>Recipients report</b> field is filled in.         </div> <p>See also: <a href="#">Use recipient related filtering</a>.</p> <p>Specify the TSI step to which the user should be directed to view all instances that meet the alarm condition. The TSI step you specify here is linked to the <b>Show results</b> action on the <b>My alarms</b> step.</p> <p><b>Preconditions</b></p> <p>You must select a step that is available for the business object to which the alarm condition applies.</p> <p>To ensure the <b>Show results</b> action works as intended, you must link to a TSI that is available in the user's/ users' Navigation Panel .</p>

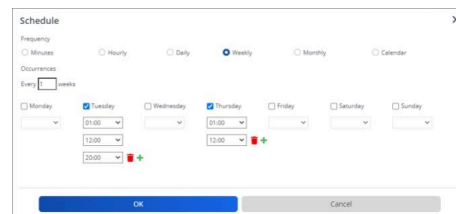
Field	Description
Priority	<p>You can only link to a TSI that is accessible via direct navigation and does not require descending via a specific drill-down path. As a workaround, you can configure a Solution Extension to support this navigation feature, but this only provides a read-only view of alarms.</p> <p>Indicate a priority for the alarm at hand; this enables users to filter on priority and decide which action should be taken first. The priority may be any number in the range of 1 to 1000.</p>
Check at login	<p>Indicate whether the alarm condition is to be checked when the user logs on to Planon ProCenter .</p> <p>If the alarm goes off, the user will be directed to the <b>My Alarms</b> selection step.</p>
Schedule	<p>Click the <b>Select a value</b> button to open the <b>Schedule</b> dialog box. Enter the frequency and the pattern for sending notifications.</p> <p>You can select: <b>Minutes, Hourly, Weekly, Monthly</b> or <b>Calendar</b>.</p> <p>If you select <b>Weekly</b>, you can specify a the schedule time per day - select the day's check box and choose a time from the list.</p> <ul style="list-style-type: none"> <li>• The list only shows whole hours and you must use the list (cannot type in the field).</li> <li>• Click the plus icon to add additional schedule times.</li> <li>• The order of scheduled times is not important, the application</li> </ul>

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**Field****Description**

will sort them in the correct order.

- You can schedule a maximum of 5 times per day.
- Click the bin icon to remove a schedule time. Only the last schedule time will have a bin icon.
- If no time is specified, the schedule will be based on the start date-time of the alert/ notification.



**1** Select **Calendar** if you want to send the notification on specific dates. You can select the required dates by clicking them in the calendar while holding down the CTRL key.

**Start date-time**


Specify the start date and time for checking the notification condition. The date-time specified is time-zone-aware, which means that the start date-time is based on the time zone of the user who created the alarm definition.

**Example**

The start date-time (Monday, July 27, 2009 12:00 PM) is based on the user's time zone (GMT +01). The schedule will start at 6:00 locally because the server is based in

Field	Description
	<p>Boston, US (EST) and there is a 6 hour time zone offset.</p> <p>The initial start date-time is used to calculate the next start date-time.</p> <p>For more information, refer to <a href="#">Next run date calculation</a>.</p>
Last result	<p>Displays the definition's current status, which is either <b>OK</b> or <b>Failed</b>. If the scheduler encounters an error when checking a notification / an alarm condition, the <b>Last result</b> field is updated accordingly.</p> <p>Refer to Supporting data &gt; Log Viewer for a list of all errors encountered by the scheduler.</p>
Next run date	<p>Indicates the next run date for the scheduler to check the alarm condition. This field is automatically updated so that the user can see when the next check is scheduled.</p> <p>For more information, refer to <a href="#">Next run date calculation</a>.</p>
Log successful alerts	<p>Click <b>Yes</b> if you want to receive a detailed list of items that meet the condition. This list is published in <i>Supporting Data &gt; Log viewer</i>.</p> <p>The <b>Source</b> column will display the definition's code.</p> <p>The <b>User</b> column will display "SCHEDULERENGINEADMIN".</p>
Log to communication log	<p>Click <b>Yes</b>, if you want log a communication log created for the item being notified on. When you enable this field, fill the <b>Communication log</b> field to identify which communication log must be created. This logging can be used only for business objects which are communication log aware.</p> <p>The following fields of the communication log will be populated by default:</p> <p><b>BeginDate</b>: Time of alerting.</p>

Field	Description
Communication log	<p><b>Code:</b> Alert definition code.</p> <p><b>Name:</b> Alert definition description.</p> <p><b>Comment:</b> Will be extended with a list (comma separated values) of the user codes or email addresses of the people that are alerted</p> <p>In this field, you need to select which communication log type must be created for alarm logging.</p> <p>Click the <b>Select a value</b> button to open the <b>Communication log</b> dialog box. In the <b>Communication log</b> dialog box, select a business object and click <b>OK</b>.</p> <p>When the <b>Log to Communication log</b> is set to <b>Yes</b>, an instance of the communication log type is created. In <b>Field Definer</b> you can create user types for communication logs (for example: telephone call, email and so on).</p>
User running the alert	<p>Specify the user whose account will be used to run the alert definition. By default, this field will be populated with the name of the user who created the alert definition. We recommend that all alert definitions are run by a special user/account and not the personal account of a Planon administrator. See also <a href="#">Run account</a>.</p>

 Note for Planon Cloud customers: the logs in the **Log viewer** show times in the UTC time zone.

[Use recipient related filtering](#)

## Action definition fields

Field	Description
Code	Enter a code number for the action definition.
Description	Specify a meaningful name for the action definition.
Alert condition	<p>Click the <b>Select a value</b> button to open the <b>Alert condition</b> dialog box. In this dialog box, click <b>Add</b> to select the business object for which you are creating a definition.</p> <p>Specify a code and the filter, and provide a filter name.</p> <p>For details on creating filters, refer to <a href="#">Using filters</a> (Fundamentals).</p> <p>Action definitions are currently only available for the following business objects:</p> <ul style="list-style-type: none"> <li>• Import-export definitions</li> <li>• CAD import definitions</li> </ul>
User running the alert	<p>Specify the user whose account will be used to run the alert definition. By default, this field will be populated with the name of the user who created the alert definition. We recommend that all alert definitions are run by a special user/account and not the personal account of a Planon administrator. See also <a href="#">Run account</a>.</p>
Log successful alerts	<p>Click <b>Yes</b> if you want to receive a detailed list of items that meet the condition. This list is published in Log viewer in Supporting data &gt; Log Viewer.</p> <p>The <b>Source</b> column will display the definition's code.</p> <p>The <b>User</b> column will display "SCHEDULERENGINEADMIN".</p>
Log to communication log	<p>Click <b>Yes</b> if you want log a communication log created for the item being notified on. When</p>

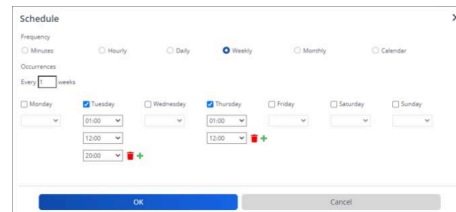
Field	Description
	<p>you enable this field, fill the <b>Communication log</b> field to identify which communication log must be created. This logging can be used only for business objects which are communication log aware.</p> <p>The following fields of the communication log will be populated by default:</p> <p><b>BeginDate:</b> Time of alerting.</p> <p><b>Code:</b> Alert definition code.</p> <p><b>Name:</b> Alert definition description.</p> <p><b>Comment:</b> Will be extended with a list (comma separated values) of the user codes or email addresses of the people that are alerted.</p>
Action	<p>Select the action to be performed. If this list is empty, no actions are available for the selected business object.</p>
Schedule	<p>Click the <b>Select a value</b> button to open the <b>Schedule</b> dialog box. Enter the frequency and the pattern for sending notifications.</p> <p>You can select: <b>Minutes, Hourly, Weekly, Monthly</b> or <b>Calendar</b>.</p> <p>If you select <b>Weekly</b>, you can specify a the schedule time per day - select the day's check box and choose a time from the list.</p> <ul style="list-style-type: none"> <li>• The list only shows whole hours and you must use the list (cannot type in the field).</li> <li>• Click the plus icon to add additional schedule times.</li> <li>• The order of scheduled times is not important, the application</li> </ul>

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**Field****Description**

will sort them in the correct order.

- You can schedule a maximum of 5 times per day.
- Click the bin icon to remove a schedule time. Only the last schedule time will have a bin icon.
- If no time is specified, the schedule will be based on the start date-time of the alert/notification.



**1** Select **Calendar** if you want to send the notification on specific dates. You can select the required dates by clicking them in the calendar while holding down the CTRL key.

**Start date-time**

Specify the start date and time for checking the notification condition. The date-time specified is time-zone-aware, which means that the start date-time is based on the time zone of the user who created the action definition.

**Example**

The start date-time (Monday, July 27, 2009 12:00 PM) is based on the user's time zone (GMT +01). The schedule will start at 6:00 locally because the server is based in



Field	Description
Communication log	<p data-bbox="902 247 1308 306">Boston, US (EST) and there is a 6 hour time zone offset.</p> <p data-bbox="902 327 1318 386">The initial start date-time is used to calculate the next start date-time.</p> <p data-bbox="902 407 1318 466">For more information, refer to <a href="#">Next run date calculation</a>.</p> <p data-bbox="902 506 1341 594">In this field, you need to select which communication log type must be created for notification logging.</p> <p data-bbox="902 615 1341 766">Click the <b>Select a value</b> button to open the <b>Communication log</b> dialog box. In the <b>Communication log</b> dialog box, select a business object and click <b>OK</b>.</p> <p data-bbox="902 787 1354 1003">When the <b>Log to Communication log</b> is set to <b>Yes</b>, an instance of the communication log type is created. You can create user types in the <b>FieldDefiner</b> for communication log. Examples of communication log types are: telephone call, email and so on.</p>
Mail template	<p data-bbox="902 1045 1328 1163">Specify a mail merge report created for a specific action on a TSI. This report will be used in the response mail of a scheduled action.</p> <p data-bbox="902 1184 1341 1310">When specifying the location of the template, to ensure that the template can be found, specify a relative path instead of an absolute path.</p>
Sender's email address	<p data-bbox="902 1352 1354 1440">Specify the e-mail address to be used as sender and reply address when sending a notification mail.</p> <p data-bbox="902 1461 1354 1520">This will allow customers to have mail sent from a specific address.</p> <p data-bbox="902 1541 1318 1654">If the sender's email address is not specified, the sender and reply address from System Settings are used.</p>
Use reference date	<p data-bbox="902 1696 1341 1814">When set to <b>Yes</b>, the reference date (= current date) is taken into account when using a mail merge report or recipient report.</p> <p data-bbox="902 1835 1354 1896">For lifecycle aware BOs (contracts, rentable units etc..) the reference date</p>

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Field	Description
	<p data-bbox="901 247 1333 338">should always be taken into account for mail merge reports and recipient reports.</p> <p data-bbox="901 359 1357 449">For life cycle business object, the alert condition also takes the reference date into account.</p> <p data-bbox="901 470 1305 531">The value of this field is not used when executing an alert condition.</p> <p data-bbox="901 552 1352 674">For other reference data aware business objects, the reference date is never used when the alert condition is applied.</p> <p data-bbox="901 695 1333 753">This setting can be used in following situation:</p> <p data-bbox="901 774 1344 993">When creating a notification on a business object that is not life cycle aware (for example contract actions) and this notification has a mail merge report in which fields of a lifecycle aware business object are added (for example contract.name).</p>

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