

MDS Alerts – Setup and Overview

DJF 4/1/2009

Overview:

The MDS Alerts Server and Subsystem is a powerful tool to allow you to monitor many of the important Business issues in your Company. Many users of the MDS system feel it's useful to get email alerts on specific actionable items. –

MDS already incorporates simple items like emailing the credit manager when an order fails a credit check or emailing a report from the End of day closing process. However when you want to customize your systems to meet your business needs the MDS Alert system is the easiest and most convenient method. Additionally you can extend the MDS alert system to your customers and advise them of a backorder situation on product and or advise them when the backorders ship.

To Begin you can either choose from our existing library of alerts or setup a new one. In our example we will setup an alert and follow it thru the system.

Example:

Business Issue – The Accounting Dept is not following up on orders on credit hold in a timely fashion – causing orders not to ship on time and a loss in possible sales.

To remedy the situation you establish a business rule that states no more then 20 orders should be on credit hold at any time during the day.

Step 1. Create our new Alert using the MDS Alert Maintenance Screen

We will create a new alert called CRCHECK (the name is up to you)

Note: The first time you enter a new one you will need a case from your TSH Representative. –This allows TSH to track all changes and build a library of Alert indicators to share with all customers –

If you don't wish to share your alert indicators you don't need to – however when new ones become available you can take them as part of your upgrade as long as the case system is in place. – In addition if you make changes to existing alerts we recommend copying them so that your changes will not be overlaid in an upgrade. Again because we use a case system we can track the changes and roll back if need be.

djf - [mail.tshinc.com-BASE.12-MDS.ALERT.MAINT012S1]

File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help

MDS Email Alert Maintenance

Name of Alert Last Date Run

Last Time Run

1.Description

2.Recall Statement (<Verb> <File Name> <Selection_Sort Criteria>)

3.Basic Program (<File> <Pgm>)

4.Text of Message to Email

CRCHECK not on file, Create it (Y/N)

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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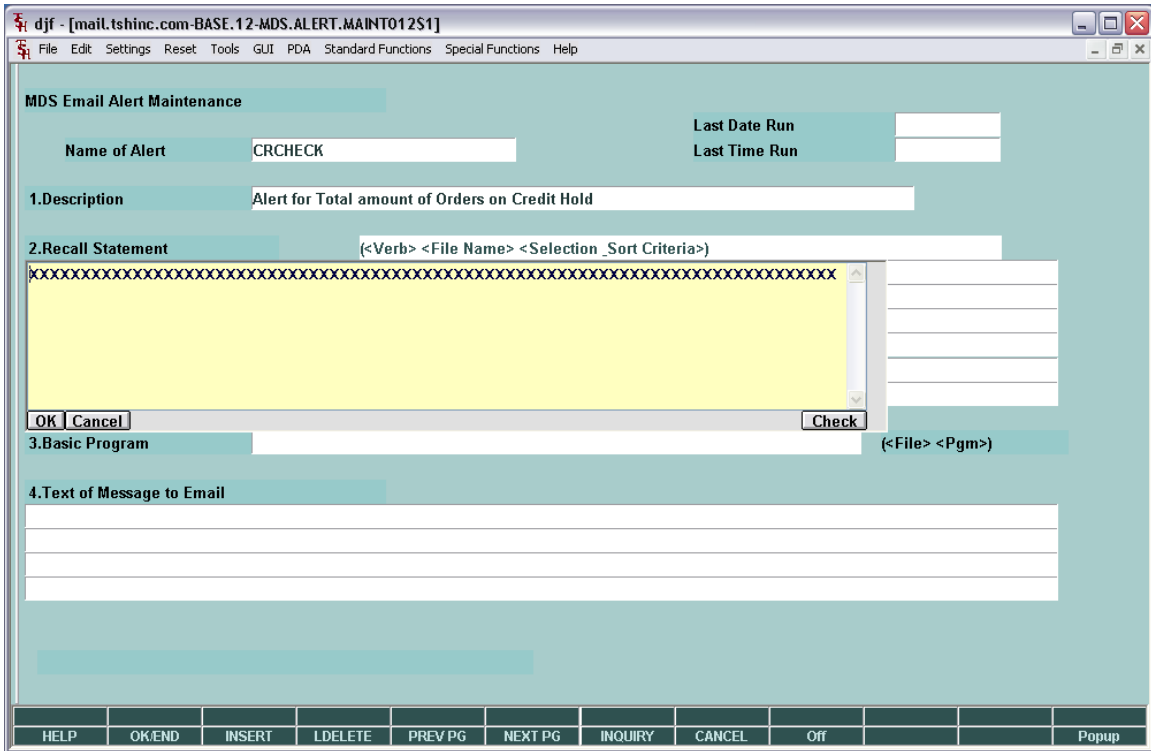
OK Cancel

MDS.ALERT CRCHECK is not checked out

Would you like to check this program out (Y/N) ?

Enter Case # :

1. Enter a Description for your alert – this will be an informative description of your alert.
 In my example I am calling it. Alert for Total amount of Orders on Credit Hold



2. You can enter any valid SQL or Universe Recall Statement to get the result's you are looking for.
 In this instance I am selecting the total number of orders with a credit hold indicator of a "Y"

SELECT COUNT (A.CUST.NO) FROM ORDERS WHERE CR.HOLD = 'Y' LPTR;

NOTE: - because all output is to email you have to actually print some output to a virtual printer which is the email – in this case the LPTR at the end of my statement tells the output to redirect to the printer.

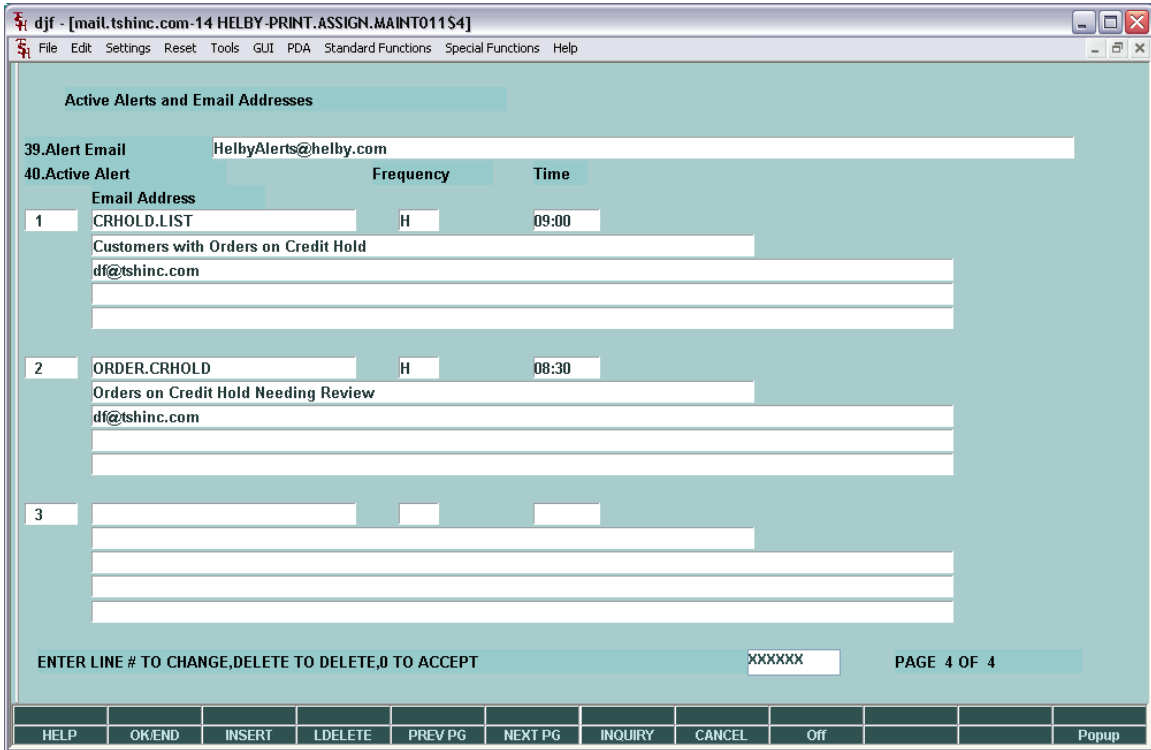
3. Basic Program – You can enter the name of any basic program or if you are familiar with basic you can write your own subroutines – this allows us to leverage the thousands of already built subroutine's already in MDS – so if you wanted to run a specific report you could have that run here and output into an email

4. Text of message for the Email – This is what will be in the body all output will be sent as an attachment to the emails

Example: Attached is the report of items on credit hold. – please review and release or cancel the orders ASAP...

Once we have completed setting up our alert we need to now tell it how often to run and who to send the emails to...

To update this we enter the MDS Printer and Inquiry Configuration Screen.



First we will setup the From Address – in my example HelbyAlerts@helby.com

You can use an address –you will want to make sure your spam blocker allows it.

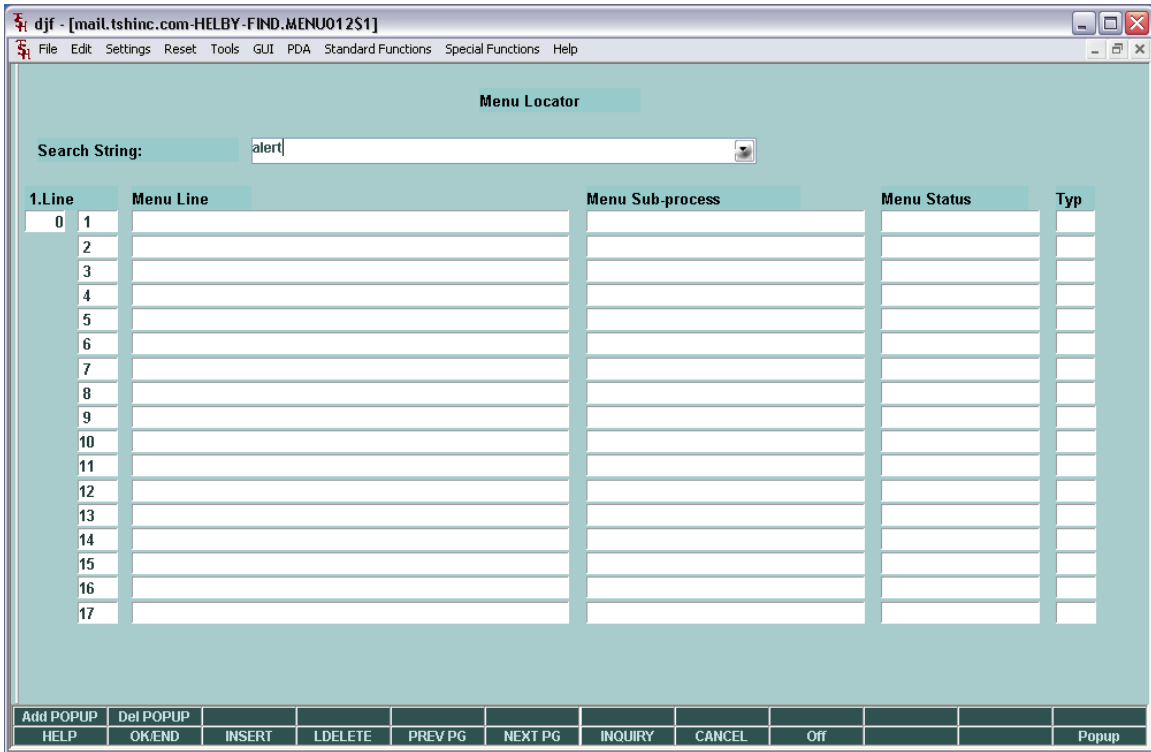
Then for Each Alert:

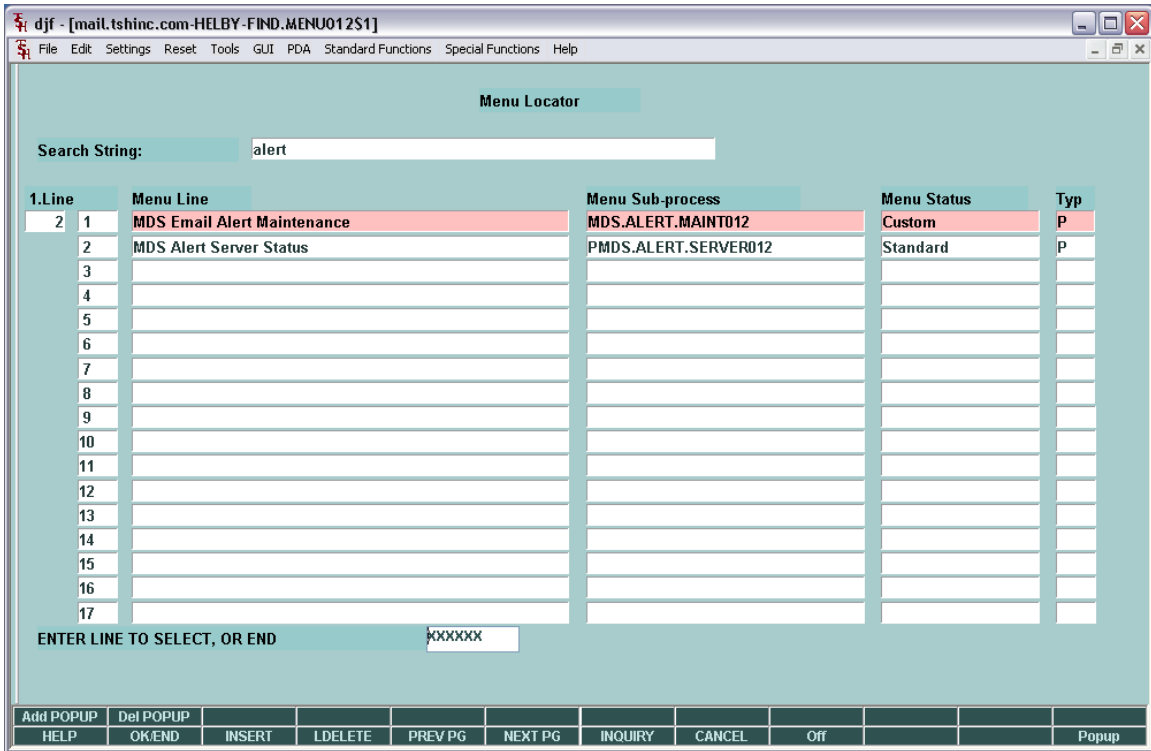
ACTIVE.ALERT ACTIVE ALERT - NAME OF THE ALERT
 ALERT.EMAIL EMAIL ADDRESSES FOR This alert
 ALERT.FREQ FREQUENCY FOR ACTIVE ALERTS -
 HOW OFTEN THE ALERT WILL BE CHECKED.
 "D" - DAILY, "H" - HOURLY, "W" - WEEKLY, "M" -
 MONTHLY
 ALERT.TIME FOR ACTIVE ALERTS TIME DURING DAY TO BEGIN
 ALERT.EMAIL SENDING EMAIL ADDRESS FOR ACTIVE ALERTS

You can specify the time of day for it to run in 24hr format i.e. 2pm is 14:00

The last step is then starting the background server that will send out your alerts – this server will need to be started after a system reboot.

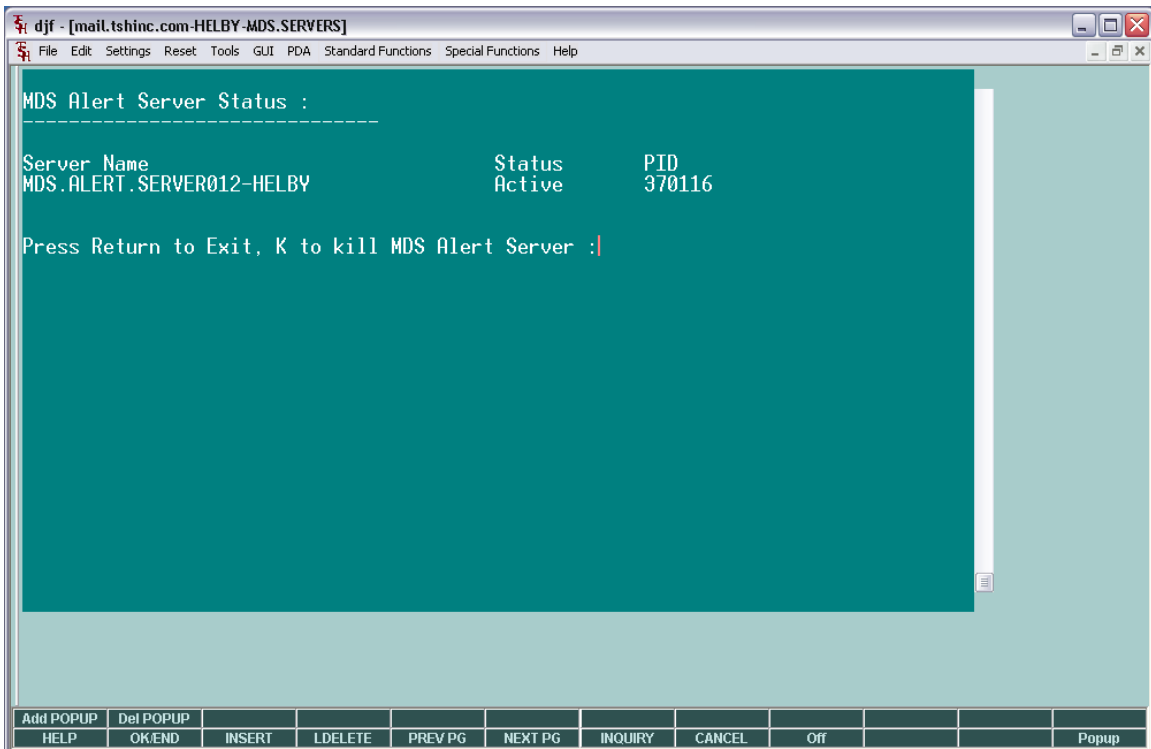
Form the menu locator/search function –
Enter “alert”





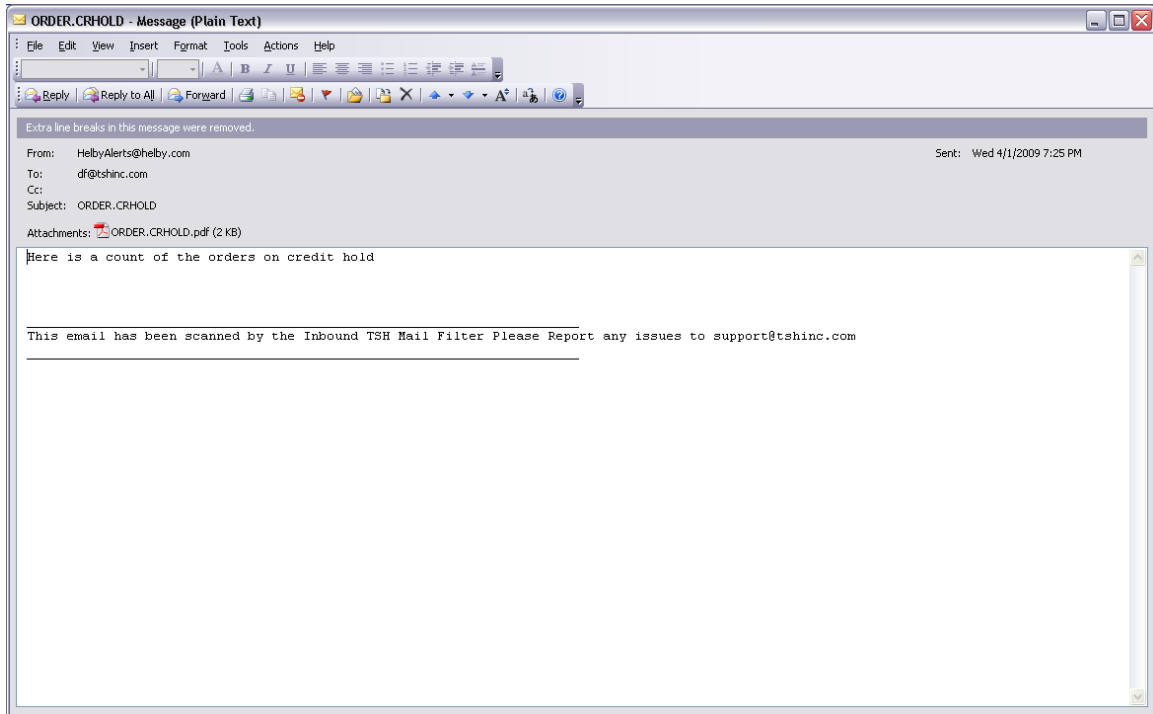
The got the MDS Alert Server Status

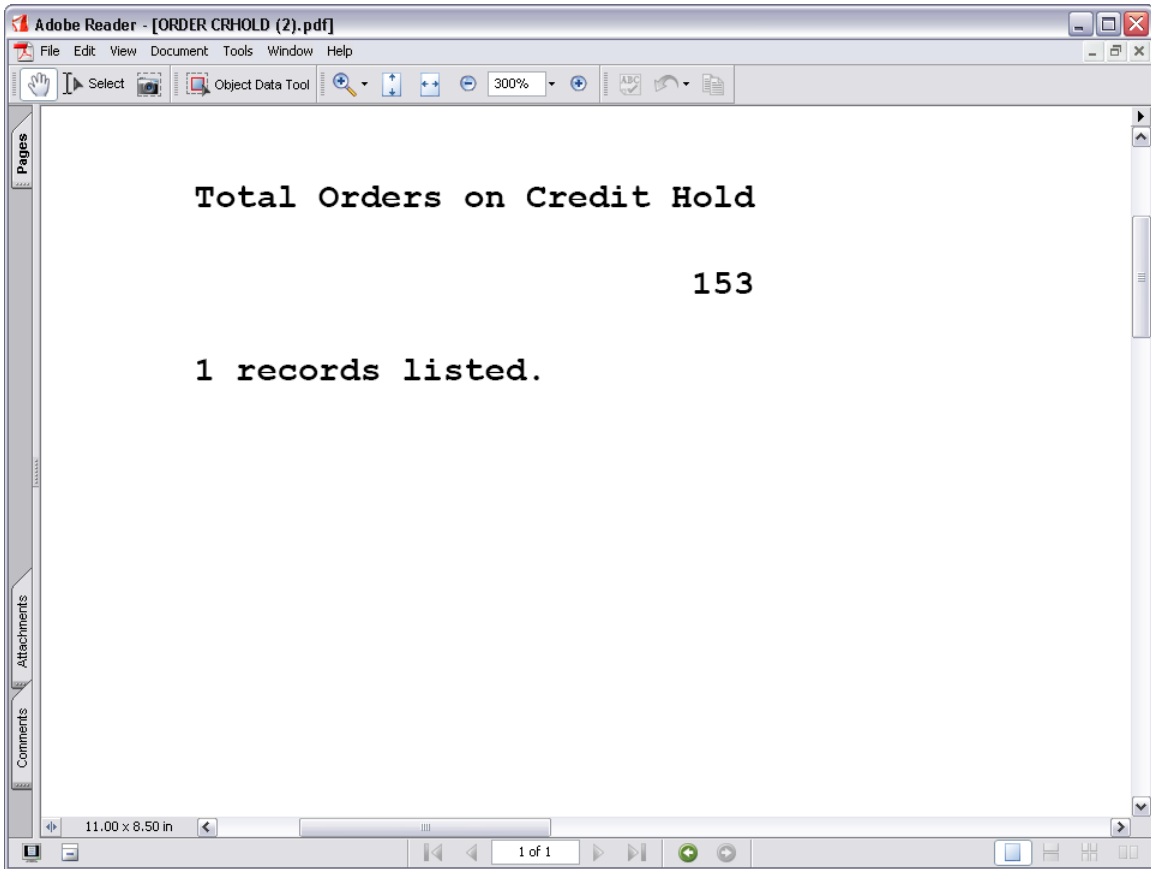
It will switch to terminal mode and show you the alert server and the database it's running against- in this case I am using the HELBY database



If you wish to start or kill the server you must be logged on with super user permissions.

Once the server is running just check your email at the setup times and you will see your messages...





Adobe Reader - [CRHOLD LIST.pdf]

File Edit View Document Tools Window Help

Select Object Data Tool 150%

Pages

07:21:30pm 01 Apr 2009 PAGE 1

ORDER..... A.CUST.NO..... TOT.AMT..... CUST.NAME.....

	A.CUST.NO.	TOT.AMT.	CUST.NAME
		0.00	
1028		122.64	SANTA FE JEWELER SUPPLY 1
1055		2,005.18	SHIPWRECK BEADS 1
10956		321.83	GAZEBO PLUS 1
11175		104.27	ARTISAN CRAFTS 1
12058		496.72	BEAD CO. OF SIOUX FALLS 1
12293		107.45	KAREN OVINGTON GLASS (RES)
12476		2,750.99	BEAD SHOP-CHORLTON
12513		152.90	DRY GULCH 1
12749		294.50	PLACE TO BEAD-WILMINGTON
134		36.00	BEAD IT-SUN WEST 1
13401		1,461.46	BEADS AND CHARMS-ELLISON
13455		247.55	ISABELLA'S TREASURE 1
13595		961.53	BEAD ISLAND 1

11.00 x 8.50 in 1 of 6