

# **INSTALLATION GUIDE**

Perspective by PPM™

Perspective Workflow™ Version 2.0

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## Overview\*

Perspective Workflow<sup>™</sup> is a business activity monitoring application that works behind the scenes to help you stay on top of Perspective's reported incidents, ongoing investigations and current assignments. It monitors and auto-responds to critical, time-sensitive data, automatically notifying the necessary personnel and guiding team members through the proper processes and protocols.

To get Perspective Workflow up and running, please follow the instructions provided throughout this guide, in order of appearance.

### Minimum System Requirements

#### Web Services Server

#### Available Disk Space<sup>†</sup>

• 1 GB

#### Processor Speed

- Minimum: 2 GHz
- Recommended: 3 GHz+

#### Memory

- Minimum: 1 GB
- Recommended: 2.5 GB+

#### **Operating System**

- Minimum: Windows Server® 2003 with SP 1
- Recommended: Windows Server 2003 with SP 2

#### .NET Framework

• Version 3.5 SP 1

IIS (Internet Information Services)

• IIS 6.0, WSE 3.0

<sup>\*</sup> This document is only applicable to organizations that have purchased Perspective Workflow, an optional module for Perspective by PPM. If you are not certain that your Perspective system includes Workflow, please contact Customer Service for verification.

<sup>&</sup>lt;sup>†</sup> Depending on the size of your Perspective database, more disk space may be required.

## Database Setup

The Perspective Workflow database setup procedure depends on what version of Perspective your organization is using and whether the Workflow setup is new or existing. Refer to the procedure below to correctly setup your database.

### New Workflow Setup - Perspective 4.0 and Greater

Follow this procedure if setting up Workflow for the first time and using Perspective 4.0 and greater.

- 1. Open Microsoft<sup>®</sup> SQL Server<sup>®</sup> Management Studio.
- 2. Run the database views script **PWFDataViews\_v2.0.sql** against the Perspective database being used with Perspective Workflow.

## **ODBC Connection Setup**

#### 1. Select Start > Administrative Tools > Data Sources (ODBC).

Note: Perspective Workflow uses the 32 bit ODBC manager regardless of whether you are running Workflow on a 32 bit or 64 bit machine. On 64 bit machines, the 32 bit ODBC device manager is typically located in the %winDrive/Windows/syswow64 directory and can be run by executing **ODBCAD32.exe**.

2. Select the **System DSN** tab and click **Add**.

<b>9</b> (	DDBC D	ata Source	Administrato	JF			? 🗙
Us	er DSN	System DSN	File DSN Dr	ivers   Tracing	Connectio	on Pooling	About
s	iystem Da	ata Sources:					
	Name		Driver			Δ	.dd
						Re	emove
						Con	figure
Γ		An ODBC St	ustem data sourc	se stores inform	ation about	how to cor	nect to
An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.							
		Г			1		
			OK	Cancel	App	y	Help

3. Select SQL Server and click Finish.

Create New Data Source	Select a driver for which you want to set up a dat Name Microsoft ODBC for Oracle Microsoft Paradox-Treiber (*.db.) Microsoft Paradox-Treiber (*.db.) Microsoft Text-Treiber (*.txt; *.csv) Microsoft Text-Treiber (*.txt; *.csv) Microsoft Visual FoxPro Driver Microsoft Visual FoxPro Driver SQL Native Client SQL Server	a source.
	< Back Finish	Cancel

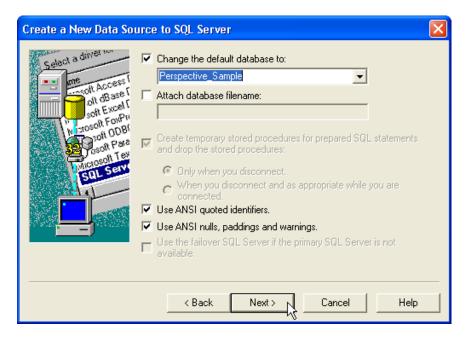
4. Enter a **Name** and **Description** for the ODBC connection; select the name of the SQL server that hosts your Perspective database; and click **Next**.

Create a New Data So	urce to SQL Server 🛛 🔀
Selact a drived to me soft Access f b Soft Access f b Soft Excel f	This wizard will help you create an ODBC data source that you can use to connect to SQL Server.         What name do you want to use to refer to the data source?         Name:       Workflow ODBC Connection         How do you want to describe the data source?         Description:         Which SQL Server do you want to connect to?         Server:       BETA\SQLExpress         Finish       Next > N         Cancel       Help

5. Choose the authentication mode you want to use for the ODBC connection (Windows authentication or SQL authentication), and click **Next**.

Create a New Data So	urce to SQL Server	×		
Select a drivel in me old dBase I old dBase I soft Exception Pason Paso Microsoft For Microsoft For Soft Server	How should SQL Server verify the authenticity of the login ID?			
< Back Next > Cancel Help				

6. Select the **Change the default database to** box and choose the name of your Perspective database from the list below.



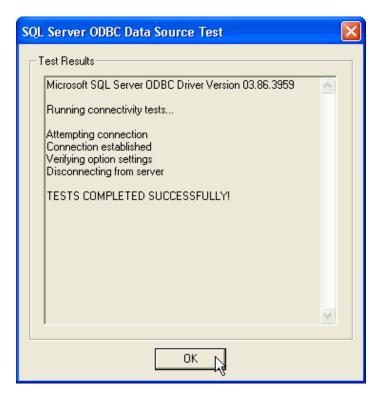
- 7. Ensure the Use ANSI quoted identifiers and Use ANSI nulls, paddings and warnings boxes are selected, and click Next.
- 8. Click Finish.

Create a New Data Sou	urce to SQL Server 🛛 🛛 🗙
Selact a diviet with me olt dB ase I olt dB ase I olt dB ase I hare to the olt dB ase I hare to the olt dB ase I hare to the olt dB ase I hare to the hare to t	<ul> <li>Change the language of SQL Server system messages to:</li> <li>English</li> <li>Use strong encryption for data</li> <li>Perform translation for character data</li> <li>Use regional settings when outputting currency, numbers, dates and times.</li> <li>Save long running queries to the log file:</li> <li>C:\DOCUME~1\RYAN~1.THI\LOCALS~1\Temp\ Browse</li> <li>Log ODBC driver statistics to the log file:</li> <li>C:\DOCUME~1\RYAN~1.THI\LOCALS~1\Temp\ Browse</li> </ul>
	K Back Finish Cancel Help

9. Click Test Data Source.

ODBC Microsoft SQL Server Setup	×
A new ODBC data source will be created with the following configuration:	
Microsoft SQL Server ODBC Driver Version 03.86.3959	~
Data Source Name: Workflow ODBC Connection Data Source Description: Server: BETA\SQLExpress Database: Perspective_Sample Language: (Default) Translate Character Data: Yes Log Long Running Queries: No Log Driver Statistics: No Use Integrated Security: Yes Use Regional Settings: No Prepared Statements Option: Drop temporary procedures on disconnect Use Failover Server: No Use ANSI Quoted Identifiers: Yes Use ANSI Quoted Identifiers: Yes Use ANSI Null, Paddings and Warnings: Yes Data Encryption: No	2
Test Data Source OK Canc	el

10. When the data source connectivity test is complete, click **OK**.



### **Perspective Workflow Installation**

1. Double-click the **PW\_Setup\_V82d.msi** file located inside the **Installation Files v1.0** folder; then click **Run**.



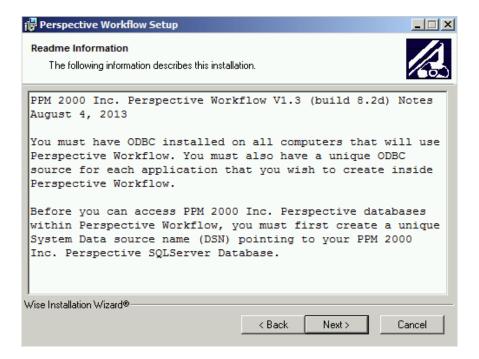
2. Click Next.



3. Select the **I accept the license agreement** radio button, and click **Next**.

🙀 Perspective Workflow Se	:tup		
License Agreement You must agree with the lic	ense agreement below to proceed.		
Please see PPM 2000 Terms & Conditions		Agreement	for
Wise Installation Wizard®	I <u>accept the license agreement</u> I <u>d</u> o not accept the license agreen <u>R</u> eset < <u>B</u> ack	nent <u>N</u> ext >	Cancel

4. Read the installation information, and click **Next** to begin the install.



5. Enter your user information, and click **Next**.

🙀 Perspective Workflow	Setup				
User Information Enter the following inform					
Full N <u>a</u> me:	Testing				
Organization:	PPM 2000 Inc.				
The settings for this application can be installed for the current user or for all users that share this computer. You must have administrator rights to install the settings for all users. Install this application for:					
Wise Installation Wizard®	< <u>B</u> ack <u>N</u> ext >	Cancel			

6. The default install destination will be displayed. (If a different location is preferred, use the **Browse** button to navigate to the chosen location.) Click **Next**.

🚏 Perspective Workflow Setup	- 🗆 🗵			
<b>Destination Folder</b> Select a folder where the application will be installed.				
The Wise Installation Wizard will install the files for Perspective Workflow in the followir folder.	ng			
To install into a different folder, click the Browse button, and select another folder.				
You can choose not to install Perspective Workflow by clicking Cancel to exit the Wis				
Destination Folder	-			
C:\Program Files\PPM 2000 Inc\Perspective Workflow\ Browse				
Wise Installation Wizard®				
	ncel			

7. Accept the default settings for all components by clicking Next.

Note: Remote Perspective Workflow clients must be individually licensed in order to run the Workflow application. If you install one or more remote Perspective Workflow clients, you must only install the core and client components on each remote client. You will not need to specify the location of the Workflow database during the installation process; the first time that a remote client is executed, the user will receive a browse button allowing them to locate the Workflow database.

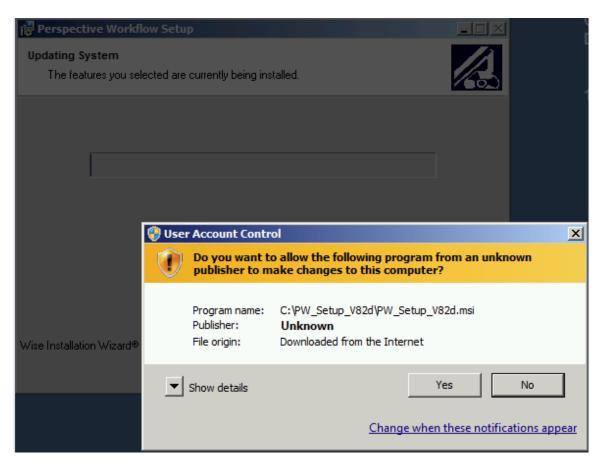
🚏 Perspective Workflow Setup		
Select Features Please select which features you would like	to install.	
Core Components Server Components Client Components	Feature Description: Select this feature if the servers and database will be installed on this computer. Do not select this feature if the database and servers are located on another computer on the network. This feature will be installed on the local hard drive This feature requires 175MB on your hard drive.	
Wise Installation Wizard® Disk Cost Beset	Brgwse	

8. Click **Next** to begin the installation.

🖶 Perspective Workflow Setup		<u> </u>
Ready to Install the Application Click Next to begin installation.		
Click the Back button to reenter the installation the wizard.	on information or click Cancel to exit	
Wise Installation Wizard®	< Back Next > 0	Cancel

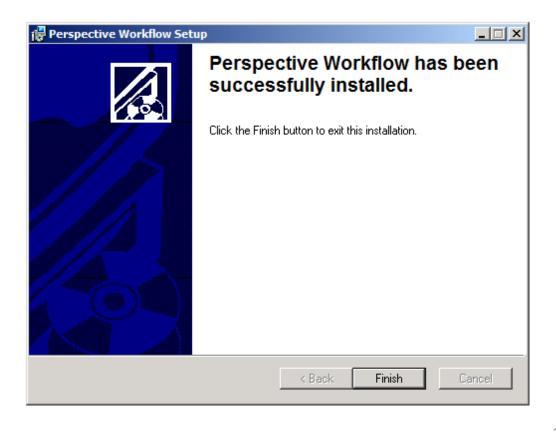
Note: The service needs to run using an account that has local admin rights to the server where workflow is installed.

9. If prompted to confirm the installation, click **Yes**.



🚰 Perspective Workflow Setup	
Updating System The features you selected are currently being installed.	
Updating component registration	
Wise Installation Wizard®	Cancel

10. Click **Finish** once the installation is complete.



- 11. Open Windows Explorer.
- 12. Navigate to the destination folder.

Note: The default location is C:\Program Files\PPM 2000 Inc\PerspectiveWorkflow\

- 13. Select the bin folder.
- 14. For each of the following executables (ks\_admin.exe, ks\_event.exe, ks\_mon.exe, ks\_serv.exe), right-click, select Properties, the Compatibility tab, Change settings for all users button, and finally, select Run this program as an administrator. Click OK. Click OK.

## **IM Installation**

There are two IM installations: IM32 (for 32 bit machines), and IM64 (for 64 bit machines). As IM is optional, only install it if you will use it.

The IM Accounts option enables you to configure and maintain the Instant Message accounts from which you will send notifications. Note that you can configure multiple IM accounts using multiple IM methods, such as Windows Live Messenger, Google Talk, and ICQ, so that you can receive IM alerts via one method while at work and via a different method while at home.

It is suggested that prior to setting up this account that you send IM "invitations" to all the recipients. Note that some IM providers (e.g., Windows Live Messenger) requires an IM recipient to "accept" invitations from an account before the messages can be successfully delivered, whereas other IM providers (e.g., ICQ) require "invitations" but do not require recipient acceptance.

1. Double-click the **IM.msi** or **IM64.msi** (32 bit or 64 bit) file located inside the **Installation Files v1.0** folder; then click **Run**.

Windows Insta	ller Ig to install		
			Cancel
IM SDK			
	hile Windows con	figures IM SDK	
Gathering required inf	omation		Cancel
1			
Extracting Files			×
Extracting File: To Directory:		f0d310c0fba6	8597021de359

## Licensing & Server Login Information

- 1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.
- 2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

<b>B</b> ,	Perspective Workflow Administrator	
	User Name: Admin Password: *****	
	ОК	Cancel

3. Under the Help menu, select About Perspective Workflow Administrator.

<b>7</b>		
<u>File View</u>	<u>l</u> elp	
🛛 🖨 Print 🛛 🕻	<u>C</u> ontents	
Activity	PPM 2000 Inc. on the <u>W</u> eb	
	About Perspective Workflow Administrator	
Server Status	Activity	F.

4. Click the **License** button.



5. Enter the license information provided to you by PPM 2000 and click <b>OK</b> , then <b>OK</b> ag	again.
--	--------

۵,	Perspective Wo	orkflow - License Code Man	agement ×
	License Owner:	NOT FOR RESALE PPM2000	
	License Expiration Date:	2015-07-17	
	License Code:	40C243D2-9142A2856	
	License Type:	ENTERPRISE-WEBCASTER	•
	Licensed Server Name:		
	Licensed DB Connections:		
	OK		Cancel

6. Click the Server Login Information button on the toolbar.

<b>7</b>				
<u>F</u> ile <u>V</u> iew <u>H</u> elp				
🛛 🚑 <u>P</u> rint 🛛 🛱 S	erver Login Information			
Activity	User Access			
	User Access			
Corrective Action Hardware Setup	Administration Folders			

7. Enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

Note: If the fields are pre-populated, delete the values and re-enter your login information.

B Perspective Workflow Admini	strator - Server Login Infor 🛛 🗙
<u>U</u> ser Name: <u>P</u> assword:	Admin
ОК	Cancel

8. Close the Perspective Workflow Administrator; then, start the Perspective Workflow service in Computer Management.

### **Email Setup**

- 1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.
- 2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

₿,	Perspective Workflow Administrator	
	User Name: Admin Password: *****	
	OK Cancel	]

3. Expand the **Software Setup** node, click **Email Accounts** and click the **New Email Account** button in the top-left corner of the window.

<b>2</b>						Pe
Eile Edit	<u>V</u> iew <u>H</u> elp					
🛛 🍋 New B	imail Account 🛛 🚑 Print 🛛 🗙 Delete 🛛 🏧 Perform Emai	ail Test				
Activit						
Corrective / Hardware						
Software S	etun	ID	Description	Email Type	Download Email	
	Server Status Server Status Server User Logins					
Email Acco						
100	Software Setup					
	Fax Accounts					
Fax Acco	Ints Fax Cover Pages					
	🐝 Holiday Schedule					
	Paging Services					
Fax Cover F	ages					
1	🚽 🖉 Webcast Locations					
	🗄 🕀 🏭 User Access					
Holiday Sch	edule					
IM Assoc	who are a second s					

4. Select INTERNET for the Email Type field; populate the Email Account Description, Outgoing Mail (SMTP) Server Name and SMTP From Name fields (the SMTP From Name field must be populated with a valid email address); ensure that the Active box is checked; and click Save and Close.

Note: You must create a separate Perspective Workflow email account for each email address that you want email notifications to be delivered from. For instance, if you would like employees in different departments to receive email notifications from different email

(Keep in mind that each event can only use one email account to se	•
Perspective Workflow - Email Accounts	×
<u>F</u> ile <u>E</u> dit <u>H</u> elp	
🔚 Save and Close 🕌 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹	

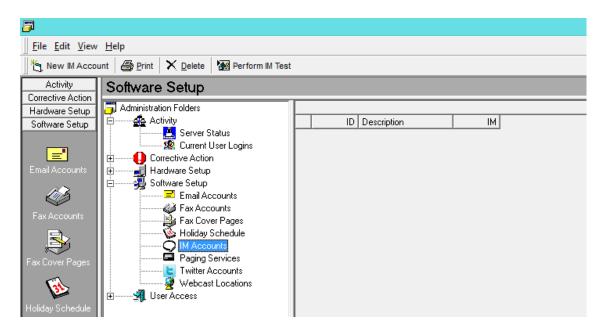
accounts you must create a Perspective Workflow email account for each department

- Email Account Description: Workflow Email General Y Dial-Up Networking Y Email Response System Options (Incoming) Y History Internal ID number: 2 Email Type: INTERNET Character Set: ascii Ŧ Ŧ Email Account Description: Workflow Email Login Name, Mailbox or Profile Name: Password: Postoffice (Exchange, Notes or VIM only): Active SMTP/POP Internet Email Information: Outgoing mail (SMTP) server name: mail.company.com SMTP From Name (required for INTERNET): Perspective Workflow <workflow@ppm2000.com> SMTP Port (optional): Incoming mail (POP) server name: mail.yourISP.net POP Port (optional): Notes:
- 5. Close the Perspective Workflow Administrator.

### **IM Setup**

- Open the Perspective Workflow Administrator. The application can generally be accessed 1. through Start > Programs > Perspective Workflow > Administrator.
- 2. In the logon window, enter your administrator User Name and Password, then click OK. (The default User Name is Admin and the default Password is master.)

3. Expand the **Software Setup** node, click **IM Accounts**.



4. **Service Provider**: Select from Windows Live Messenger, Google Talk, Yahoo! Messenger, and ICQ.

**Account Description**: A description of the account that will be used for sending IM notifications.

**Username**: The user name for this IM account. Note that different IM methods (such as Windows Live Messenger and ICQ) require different types of login information. Typically, Windows Live Messenger uses an email address whereas ICQ uses a unique numeric identifier. Please refer to the documentation/help text for your preferred IM provider for details.

Password: The password of this IM account.

Active: Whether this account is currently available for sending IM alerts (you can configure an account without enabling it for immediate use)

Note: Each IM alert message may not exceed 1,500 characters (including spaces) in length.

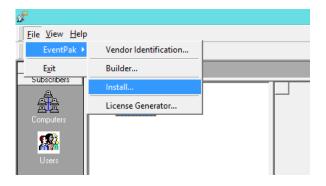
O   Perspective	e Workflow - IM Accounts
<u>F</u> ile <u>E</u> dit <u>H</u> elp	
$\blacksquare$ Save and Close $\blacksquare$ Save and New $ imes$	Delete 🔺 Previous 🔹 🕈 Next 🔹
Instant Message Service Provider:	
General History	
Internal ID number:	
Instant Message Service Provider:	Windows Live Messenger 🗸
Instant Message Account Description:	Windows Live
Username:	acmecorp@live.com
Password:	якки
· · · · · · · · · · · · · · · · · · ·	<ul> <li>Active</li> </ul>
Notes:	
	^
	~

### Perspective Workflow Event Pak Installation

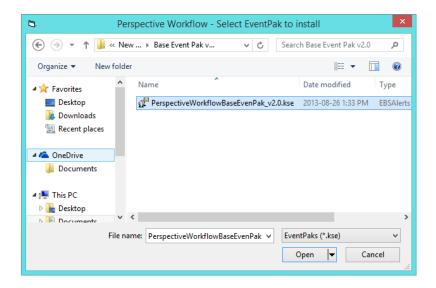
- 1. Open the Perspective Workflow Event Manager. The application can generally be accessed through **Start > Programs > Perspective Workflow > Event Manager**.
- 2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and the default Password is **master**.)

5	Perspective Workflow Event Manager						
	User Name: Admin						
	Password: *****						
	OK Cancel						

3. Under the **File** menu, select **Event Pak** then click **Install**.



4. Browse to the location of the **PerspectiveWorkflowEventPak\_v2.0.kse** file (included in the **Event Pak** folder); then, click **Open**.



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Perspective V	Workflow - EventPak Installation 🛛 – 🗖 🗙					
EventPak Description	StandardEventPak					
Company	ExpandableAlerts Company Name					
Sales Contact Name: Sales Contact Name						
Sales Phone Number						
Sales Email Address						
Sales Website Address	, http://www.yoursite.com					
EventPak Version	1.0					
EventPak Release Date	2013-08-26					
Installation Notes: Installation notes are here	~					
The following Ap	plication(s) will be installed into the Database					
Application	Destination Folder/Application (Click for dropdown list)					
Standard Event Pak - Activities	Install as new application into folder-> Application Events					
Standard Event Pak - Admin	Install as new application into folder-> Application Events					
Standard Event Pak - Assignments -	Install as new application into folder-> Application Events					
Standard Event Pak - Cases	Install as new application into folder-> Application Events					
Standard Event Pak - eIncidents	Install as new application into folder-> Application Events					
Install	Cancel					

#### 5. Click Install.

6. When the **Finished** message appears at the bottom of the window, click **Close**.



- 7. Select one of the **Standard Event Paks** under **Application Events**.
- 8. Click the **Properties** button to bring up the database connection window.

9. Delete all connections that currently exist by selecting them, clicking **Edit Connection**, and **Delete**.

₫ <sup>®</sup>		
<u>F</u> ile <u>V</u> iew <u>H</u> el	p	
New Applicat	tion 🎽 New Folder 🛛 🚑 Print	
Events	Events	
Application Events	Event Management Folders     Application Events     Company Name     Standard Event Pak - Activities     Standard Event Pak - Admin     Standard Event Pak - Assignments - General     Standard Event Pak - Cases     Standard Event Pak - Incidents     Standard Event Pak - Incidents     Standard Event Pak - Organizations     Standard Event Pak - Organizations     Standard Event Pak - Persons     Standard Event Pak - Persons     Standard Event Pak - Vehicles     Subscribers	

10. With **Perspective Connection** selected in the **Connection to Use For Database Access** field, click the **Edit Connection** button.

۵,	Perspective Workflow - Standard Event Pak - Activities Prop	perties – 🗆 🗙						
	Description: Standard Event Pak - Activities							
Conn	Connection to Use For Database Access:							
Pers	pectiveConnection	Edit Connection						
		New Connection						
	OK	Cancel						

11. In the **ODBC Data Source Name (DSN)** field, select the ODBC connection that you created in the *ODBC Connection Setup* phase of this installation process; click **Save and Close**; and then click **OK**.

Note: If SQL authentication was used for the ODBC connection, you must also enter your SQL credentials in the **Username** and **Password** fields. These will be the same credentials that Perspective uses to connect to the database, not the username and password used to get into Perspective.

<u>File Edit H</u> elp
Save and Close X Delete
Connection Description:
General History
Internal ID number: 74
Connection Description: Standard Event Pak - Activities
ODBC Data Source Name (DSN):
Username:
Password:
Date Separation Character: Use Coordinated Universal Time (UTC) for Date/Times
Long Tablename LEFT Character: Link/Join prefix (Optional):
Long Tablename RIGHT Character: Link/Join suffix (Optional):
Column Alias Character:
Retrieve Database Owner with objects if available.
Remove parentheses from Link/Joins
Script API Name:
Script API Username:
Script API Password:

### Subscriber Configuration

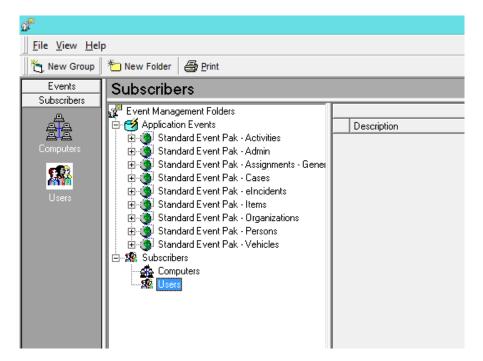
In Perspective Workflow, individuals who receive email notifications when events are triggered are known as "subscribers." Each event must have one or more subscribers associated with it, but before you can choose subscribers for each of your events, you must either manually create subscriber records within Perspective Workflow or link user records in your Perspective database to Perspective Workflow's subscriber list.

Note: Subscriber linking is dynamic; in other words, updates to your Perspective user records will automatically be reflected in your Perspective Workflow subscriber list.

For more information on subscriber configuration, please refer to the *Subscriber Maintenance* section of the *Perspective Workflow User's Guide*.

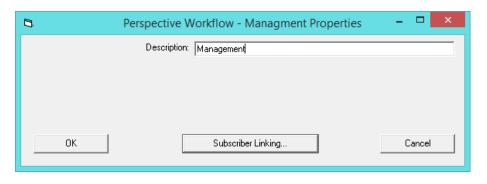
### Manually Creating a Subscriber

1. In Perspective Workflow Event Manager, expand the **Subscribers** node and select **Users**.

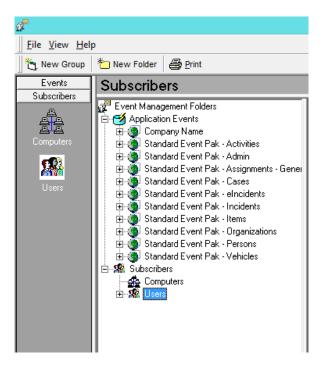


2. Click the **New Group** button in the top-left corner of the window.

3. Enter a **Description** for your group; then click **OK**.



4. Select your new group under the **Users** node, and click the **New User** button.



5. Complete the Last Name and First Name fields, and check the Active box. (The Full Name field will automatically populate.)

Perspective Workflow - Subscribers\Users\Managment						
<u>F</u> ile <u>E</u> dit <u>H</u> elp						
Save and Close Save and New X Delete A Previous V Vext V						
Subscriber Name:						
Description Copy Email Fax Page WebCast Instant Message Subscriptions Internal ID number:						
Last Name: Smith						
First Name: Sara Jane						
Full Name: Smith, Sara Jane						
Job Title:						
Company Name:						
Phone Number:						
IP Address:						
Computer Name:						
User Lookup Key: SMITHS						
T Active						
History:						
Item created on:						
Item last changed by:						
Item last changed on:						
Kext >>     Cancel						

- 6. Select the **Email** tab, specify the subscriber's primary email address in **Email Address 1** and, if applicable, enter their secondary email address in **Email Address 2**.
- 7. Indicate which email address (1 or 2) should be used on various days of the week and times of day to notify the subscriber of an event's occurrence. To indicate that both addresses should be used in a given time slot, enter an asterisk (\*), or you may leave the slot blank to indicate that neither email address should be used. Alternatively, you can click the Use Address 1 for All, Use Address 2 for All, or Use Both for All buttons to quickly apply settings to all time slots.

1	Perspective Workflow - Subscribers\Users\Managment									
<u>F</u> il	<u>File</u> <u>E</u> dit <u>H</u> elp									
	Save and Close 🍹 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹									
	Subscriber Name:									
D	Description Copy Email Fax Page WebCast Instant Message Subscriptions									
		+ ····· [ - · · · ·								
			C	mail Audress I.	sarajane.sn	nith@acme.com	n			- 1
			E	mail Address2	sarajane.sn	nith@acme.cor	n			
			Ple	ase select whi	ch Email Addr	ess to use at th	ne specified tin	ne:		
Г			1=Em	ail Address 1, 2	=Email Addre:	ss 2, * = Both, !	Space Bar for	None		
	Т	Segment	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
	ÞŤ	12:00 AM	2	2	2	2	2	2	2	
		12:30 AM	2	2	2	2	2	2	2	
		1:00 AM	2	2	2	2	2	2	2	1 11
	1:30 AM 2		2	2	2	2	2	2	1 11	
		2:00 AM	2	2	2	2	2	2	2	1 11
		2:30 AM	2	2	2	2	2	2	2	1
		3:00 AM	2	2	2	2	2	2	2	1
		3:30 AM	2	2	2	2	2	2	2	1
		4:00 AM	2	2	2	2	2	2	2	1
		4:30 AM	2	2	2	2	2	2	2	
		5:00 AM	2	2	2	2	2	2	2	1
		5:30 AM	2	2	2	2	2	2	2	
		6:00 AM	2	2	2	2	2	2	2	-
	Restore Defaults     Use Address1 for All     Use Address2 for All     Use Both for All									
	<< <u>B</u> ack <u>N</u> ext >> Cancel <u>H</u> elp									

8. **IM Setup for Subscriber**: Select the Instant Message tab, select the Instant Message Service Provider, and finally, select the IM Username of the subscriber (the person who will be receiving the IM notifications).

Rerspective Workflow - Subscribers\Users\Managment								×		
<u>F</u> ile	<u>F</u> ile <u>E</u> dit <u>H</u> elp									
Save and Close 🙀 Save and New 🗙 Delete 🔺 Previous 🔹 🐨 Next 🔹										
	Subscriber Name:									
Des	Description Copy Email Fax Page WebCast Instant Message Subscriptions									
	Instant	Message Serv	vice Provider 1	:					╶	
	Ir	nstant Messag	je Username 1	: sarajane.si	nith				-1	
	Instant I	Message Serv	/ice Provider 2	:					<b>–</b>	
		-	je Username 2	1	nith				-1	
			,	. Isaralarie:si	man					
		F	Please select v	vhich Name to	o use at the spe	cified time:				
			1=Name1,2	2=Name2, * =	Both, Space Ba	ar for None				
	Segment	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
	12:00 AM	2	2	2	2	2	2	2		
	12:30 AM	2	2	2	2	2	2	2		
	1:00 AM	2	2	2	2	2	2	2		
	1:30 AM	2	2	2	2	2	2	2	7 11	
	2:00 AM	2	2	2	2	2	2	2	7	
	2:30 AM	2	2	2	2	2	2	2	7 11	
	3:00 AM	2	2	2	2	2	2	2		
	3:30 AM	2	2	2	2	2	2	2		
	4:00 AM	2	2	2	2	2	2	2		
	4:30 AM	2	2	2	2	2	2	2	•	
	Restore Defaults Use Name1 for All Use Name2 for All Use Both for All									
<< Back Next >> Cancel Help										

- 9. Click Save and Close.
- 10. Continue to apply these steps to manually create additional subscribers as needed.

### Linking a Subscriber Group

 In the Perspective Workflow Event Manager, select one of the default groups under Subscribers > Users (i.e., Perspective Users, Perspective Supervisors or Perspective Users). Then, click the Properties button at the top of the window.



2. Click the **Subscriber Linking** button.

₿,	Perspective Workflow - Perspective Users Properties	-	
	Description: Perspective Users		
	OK Subscriber Linking	0	Cancel

#### 3. Click the **Select Query** button.

۵,	🗈 Perspective Users Subscriber Linking 🛛 – 🗖 🗙								
Subscribers of content are stored in the database. Optionally, you may create a link to subscribers that exist outside of the database. You must first define a query that retrieves the subscriber information. You must then must specify which fields from the query equate to fields inside the subscriber database. Once the subscribers are linked, the product will use the linked information in order to perform content delivery. Query to use as subscriber content:									
Select Query									
	Subscriber Linking Fie	eld (	Definition						
	Subscriber Field		Linked to Database Field						
▶	Subscriber Name	=							
	Last Name	=							
	First Name	=							
	Title	=							
	Company Name	=							
	Phone Number	=							
	Computer Name	=							
	IP Address	=							
	Email Address 1	=							
	Email Address 2	=							
	Pager Terminal Number 1	=							
	Pager Terminal Number 2	=							
	Pager PIN Number 1	=							
	Pager PIN Number 2	=							
	Fax Number 1	=							
	Fax Number 2 Webcast Name 1	=							
	Webcast Name 1 Webcast Name 2	=							
		=							
	Copy Location 1 = Copy Location 2 =								
	Copy Education 2	-							
	OK Remove Subscriber Link Cancel								

4. Select the **Standard Event Pak - Admin** application from the list by clicking on the arrow to the left of the name; then click the **Select** button.

₿,	Perspective Workflow - Select Another Application	-		×
	Select Another Application			
	Application			
	Standard Event Pak - Activities			
	Standard Event Pak - Admin			
	Standard Event Pak - Assignments - General			
	Standard Event Pak - Cases			
	Standard Event Pak - eIncidents			
	Standard Event Pak - Items			
	Standard Event Pak - Organizations			
	Standard Event Pak - Persons			
	Standard Event Pak - Vehicles			
	Select	Can		
	Select	Lan	Cei	

### 5. Select Admin – All Users with Primary Email.

6. Then, click the **Select** button.

6	Perspective Workflow - Add Query	- 🗆 🗙		
	Application: Standard Event Pak - Admin			
	Select Another Application			
	Queries Available For This Application			
Query Description		Notes		
Admin - All Current Log	ged On Users			
Admin - All Users				
Admin - All Users Role X				
Admin - All Users with Primary Email				
Admin - All Users Workgroup X'				
Admin - System Adminis	strator Login			
•		Þ		
Select	New Query	Cancel		

7. In the **Linked to Database Field** column on the right, select only the values shown in the following screenshot and click **OK**; then, click **OK** again.

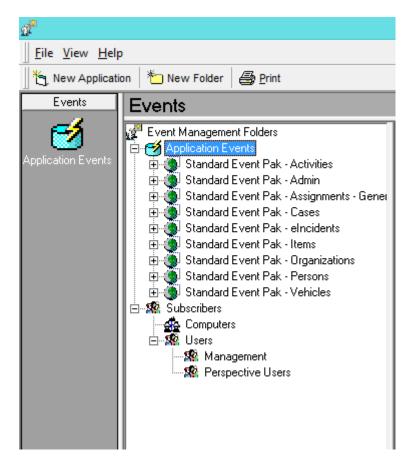
Note: This will link only to each subscriber's primary email address in Perspective (the email address that appears in the subscriber's **Person** record with the **Primary** box checked.)

₿,	Perspectiv	e Users Subsc	ri	ber Linking	- 🗆 🗙	
the ( whic prod	Subscribers of content are stored in the database. Optionally, you may create a link to subscribers that exist outside of the database. You must first define a query that retrieves the subscriber information. You must then must specify which fields from the query equate to fields inside the subscriber database. Once the subscribers are linked, the product will use the linked information in order to perform content delivery.					
Adr	min - All Users				Select Query	
	Subs	criber Linking Field	ID	efinition		
	Subscriber Field		Ť	Linked to Database Field		
	Subscriber Name	=	Ţ			
	Last Name	=	:	LastName		
	First Name	=	•	FirstName		
	Title	=	•			
	Company Name	=	•			
	Phone Number	=	•			
	Computer Name	=	•			
IP Address		=	-			
Email Address 1		=	$\rightarrow$	EmailAddress		
	Email Address 2		$\rightarrow$	EmailAddress		
	Pager Terminal Number 1	=	+			
	Pager Terminal Number 2	=	+			
	Pager PIN Number 1 Pager PIN Number 2	=	+			
	Fager PIN Number 2	=	+			
-	Fax Number 2	=	+	1		
Webcast Name 1			+			
Webcast Name 2		=	+			
	Copy Location 1		:			
	Copy Location 2					
	OK Re	emove Subscriber L	Lin	k	Cancel	

# Application Creation

Before using any of the events in your Perspective Workflow Event Pak, you must complete the following steps:

1. Select Application Events.



- 2. Click New Application.
- 3. A pop-up will appear telling you to name the application. Select the ODCB connection that was created earlier.

8	Perspective	e Workflow -	New Application	- 🗆 🗙
	New Application	Company Name		
Connection to Use For Data	abase Access:			
PerspectiveConnection			•	Edit Connection
				New Connection
ОК				Cancel

#### 4. Click OK.

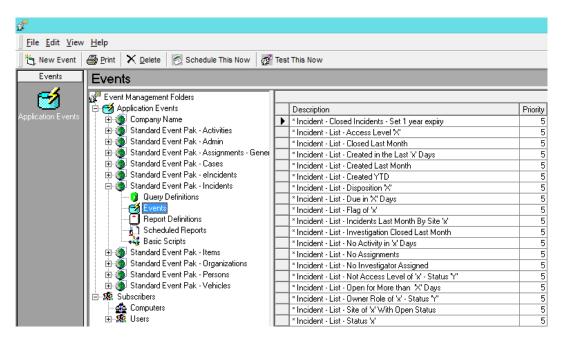
## **Event Configuration**

Before using any of the events in your Perspective Workflow Event Pak, you must complete the following steps:

- Specify the filter values that each event's queries will use (if applicable).
- Run each event once using the Schedule This Now option.
- Set each event to "Active" status.
- Select the email account that each event's alert messages will be sent from.
- Ensure that each event has at least one subscriber with the Email box checked.
- Enter a schedule for each event.

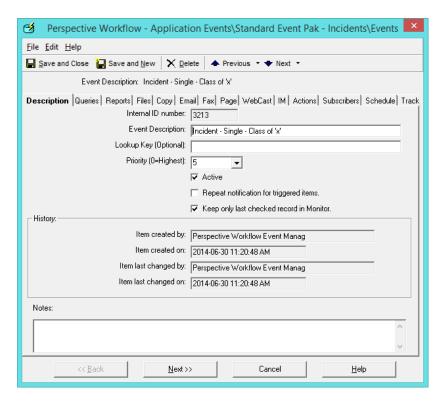
For more information on configuring events, including designing events of your own, please refer to the *Event Designing* section of the *Perspective Workflow User's Guide*.

1. In the Perspective Workflow Event Manager, expand the **Standard Event Pak - Incidents** node and select **Events**.



2. Double-click an event in the list on the right that meets your requirements (consult the *Workflow Event Paks* document).

• For this example, we are going to use Incident - Single - Incident Class 'x'.



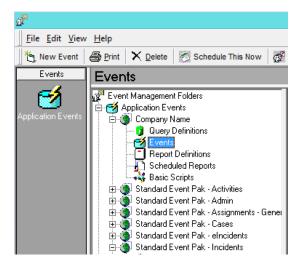
- 3. Double-click the Event to open it.
- 4. Click the Queries tab.

Perspective Workflow	- Application	Events\St	andard Ever	nt Pak - Incid	lents\Events 🛛 🗙
<u>File Edit H</u> elp					
📕 Save and Close 🏾 📔 Save and S	lew 🗙 Delete	A Previou	is 🔹 🜩 Next	•	
Event Description:	Incident - Single - C	lass of 'x'			
Description <b>Queries</b> Reports File	es] Copy  Email  F	ax  Page  V	/ebCast   IM   A	ctions Subscrib	ers  Schedule  Track
		Queries 9	elected For Con	itent	
	ication	Query Desc			
Add Query 🕨 Stan	dard Event Pak -	Incident - Cl	ass 'x'		
Use Script instead of Query	Use Script instead of Query Script.				
	Event T	rigger Param	eters		]
Question		-		Answer	
What Class value would you like					
How far back would you like to	search?				
<< <u>B</u> ack	<u>N</u> ext>>		Cancel		Help

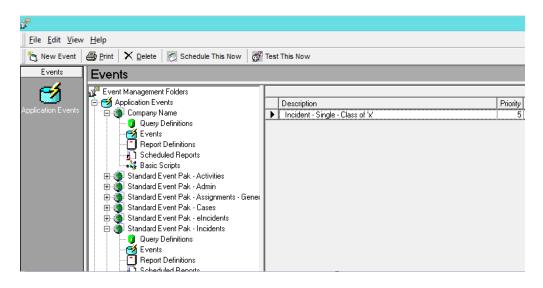
- 5. Make a note of the query it is using.
- 6. Close the window.
- 7. Highlight the Event and CTRL + C.

🗄 📲 Users	* Incident - List - Status 'x'	5
	* Incident - List - Workgroup 'x' - Status 'Y'	5
	* Incident - Normalize Access Level to 1	5
	* Incident - Single - Access Level X	5
	* Incident - Single - Blank Outcome with Status Closed	5
	* Incident - Single - Business Unit Level 1 of 'x'	5
	* Incident - Single - Business Unit Level 1 of 'x', Level 2 'Y'	5
	* Incident - Single - Business Unit Level 1 of 'x', Level 2 'Y', Level 3	5
	* Incident - Single - Business Unit Level 1 of 'x', Level 2 'Y', Level 3	5
	Incident - Single - Class of 'x'	5
	* Incident - Single - Class of 'x', Category 'Y'	5
	* Incident - Single - Class of 'x', Category 'Y', Subcategory 'Z'	5
	* Incident - Single - Due in X' Days	5
	* Incident - Single - Flag of 'x'	5
	* Incident - Single - Follow-up Required in 'X' Days	5
	* Incident - Single - Involved Person with Flag of 'x'	5
	* Incident - Single - New Incident	5
	* Incident - Single - New Investigation by site 'x'	5
	* Incident - Single - No Activity in 'x' Days	5

- 8. Go to the application that you created earlier.
- 9. Expand it and click Events.



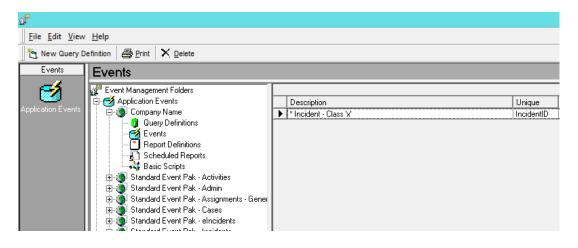
- 10. Make the Description window active by clicking inside of it.
- 11. Type CTRL + V to move the Event.



- 12. Go back to Standard Event Pak Incidents.
- 13. Click Query Definitions.
- 14. Find the name of the query noted above. In this example, it is Incident Incident Class 'X'.

<u>File E</u> dit <u>V</u> iew			
🍾 New Query D	efinition 🔮 Print 🗙 Delete		
Events	Events		
es 🔁 🗌	😰 Event Management Folders		
• <u>•••</u> •	🖻 🥳 Application Events	Description	Unique
Application Events	🖻 🍓 Company Name	* Incident - Access Level X'	IncidentID
	🖳 🥦 Query Definitions	* Incident - Blank Outcome with Status Closed	IncidentID
	Events	* Incident - Business Unit Level 1 of 'x'	IncidentID
	Report Definitions	* Incident - Business Unit Level 1 of 'x', Level 2 'Y'	IncidentID
	Scheduled Reports	* Incident - Business Unit Level 1 of 'x', Level 2 'Y', Level 3 'Z'	IncidentID
	Basic Scripts	* Incident - Business Unit Level 1 of 'x', Level 2 'Y', Level 3 'Z', Level	IncidentID
	🕀 🍥 Standard Event Pak - Activities	* Incident - Class 'x'	IncidentID
	🗈 🌘 Standard Event Pak - Admin	* Incident - Class 'x', Category 'Y'	IncidentID
	🗄 🍥 Standard Event Pak - Assignments - Gener	* Incident - Class 'x', Category 'Y', Subcategory 'Z'	IncidentID
	🕀 🌉 Standard Event Pak - Cases	* Incident - Closed Incidents	IncidentID
	🗈 🍓 Standard Event Pak - eIncidents	* Incident - Closed Incidents - No Expiry	IncidentID
	🖻 🍓 Standard Event Pak - Incidents	* Incident - Closed Last Month	IncidentNu
	Query Definitions	* Incident - Created in the Last 'x' Days	IncidentID
	Events	* Incident - Created Last Month	IncidentID
	Report Definitions	* Incident - Created YTD	IncidentID
	Scheduled Reports	* Incident - Disposition 'X'	IncidentID
	Basic Scripts	* Incident - Due in 'X' Days	IncidentID
	📄 🕀 🦓 Standard Event Pak - Items	* Incident - Flag of 'v'	IncidentID

- 15. Highlight the Incident New Incident and type CTRL + C.
- 16. Go to the new application and click Query Definitions.
- 17. Make the Description window active by clicking inside of it.
- 18. Type CTRL + V to move the Query.



- 19. Go back to the new application events.
- 20. Double-click the Incident Single Incident Class 'X'.

🥶 Perspective Workflow - Application Events\Company Name\Events
<u>F</u> ile <u>E</u> dit <u>H</u> elp
🔄 Save and Close 🙀 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹
Event Description: Incident - Single - Class of 'X'
Description Queries   Reports   Files   Copy   Email   Fax   Page   WebCast   IM   Actions   Subscribers   Schedule   Track Internal ID number: 3254
Event Description: Incident - Single - Class of 'X'
Lookup Key (Optional):
Priority (0=Highest): 5
Active
Repeat notification for triggered items.
Keep only last checked record in Monitor.
History:
Item created on: 2014-06-30 11:24:31 AM
Item last changed by: GKBT5L1:Heidi.Suteau
Item last changed on: 2014-06-30 11:24:31 AM
Notes:
^
×
<< Back Next >> Cancel Help

- 21. In the Description tab, check the Active box.
- 22. Click the Query's tab. Note: Where Application still has Standard Event Pak.

Perspective Wo	orkflow - Application Even	ts\Company Name\Events		
<u>F</u> ile <u>E</u> dit <u>H</u> elp				
📕 Save and Close 🛛 📔 Save and	New X Delete + Previous	• 🗣 Next 👻		
Event Description:	Incident - Single - Class of 'x'			
Description <b>Queries</b> Reports Fil	es] Copy  Email  Fax  Page  Web	Cast   IM   Actions   Subscribers   Schedule   Track		
	Queries Sele	ected For Content		
	lication Query Descripti			
Add Query 🕨 Star	idard Event Pak - Incident - Class	· ¥		
Use Script instead of Query	Script:	Select Script		
	<-Remove Query	<<-Remove All Queries		
	Event Trigger Parameter	8		
Question		Answer		
What Class value would you lik				
How far back would you like to search?				
<< <u>B</u> ack	<u>N</u> ext>>	Cancel <u>H</u> elp		

- 23. Click the Remove All Queries button.
- 24. Click New Query.

8	Perspective Workflow - Add Query	- 🗆 🗙
	Application: Company Name	
	Select Another Application	
	Queries Available For This Application	
Query Description  Incident - Class 'x'		Notes
•		Þ
Select	New Query	Cancel

25. Select Incident – New Incident Query.

Perspective Workflow - Appli	ication Events\Company Name\Events			
<u>F</u> ile <u>E</u> dit <u>H</u> elp				
Save and Close Save and New X Delete	◆ Previous ▼ ◆ Next ▼			
Event Description: Incident - Single - C	Jass of 'x'			
Description Queries Reports Files Copy Email F	ax] Page  WebCast   IM   Actions   Subscribers   Schedule   Track			
	Queries Selected For Content			
Application	Query Description			
Add Query	Incident - Class 'x'			
Use Script instead of Query Script:	Select Script			
<-Remove Qu	uery <<-Remove All Queries			
Event 7	Trigger Parameters			
Question	Answer			
What Class value would you like to filter by?				
How far back would you like to search?				
<< Back Next >>	Cancel <u>H</u> elp			

#### 26. Click Select. Note: The application changes.

27. If there is an 'X' in the name, you can enter a parameter in the Event Trigger Parameters field by clicking the ellipsis and selecting a value, or entering it directly in the text field.

Note: Only values that have been saved in at least one record in your database will be available for selection using the **Browse (...)** button. If you wish to specify a filter value that is not available, you must type it in the **Answer** field.

8	Perspective Workflow - Please supply a value 🛛 – 🗖 🗙
	What Class value would you like to filter by?
	· ·
	Available Substitution Variables:
	%Current Date MM/DD/YYYY%     A       %Current Date Time%     A       %Current Date YYYY/MM/DD%     A
ОК	Select This Item to compare Cancel

Perspective W	orkflow - Application Events\Co	ompany Name\Events	
<u>F</u> ile <u>E</u> dit <u>H</u> elp			
🔚 Save and Close 🛛 📔 Save and	<u>N</u> ew 🗙 <u>D</u> elete 🔺 Previous 🔹 🕈	Next -	
Event Description:	Incident - Single - Class of 'x'		
Description <b>Queries</b> Reports Fi	les Copy Email Fax Page WebCast	IM Actions Subscribers Schedule Track	
	Queries Selected I	For Content	
	olication Query Description		
Add Query 🕨 Sta	ndard Event Pak - Incident - Class 'x'		
Use Script instead of Query	Script:	Select Script	
	Event Trigger Parameters		
Question	Event higger radineters	Answer	
What Class value would you lik	e to filter by?	Criminal	
🖉 How far back would you like to	search?	2	
<< <u>B</u> ack	Next >> Can	cel <u>H</u> elp	

28. Select the **Email** tab, and choose an option for the **Email Account to Send From** field. (This indicates the account that all email alert messages for this event will be sent from.)

Perspective Workflow - Application Events\Company Name\Events		
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
🛃 Save and Close 🎇 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 📼		
Event Description: Incident - Single - Class of 'x'		
Description   Queries   Reports   Files   Copy <b>Email</b>   Fax   Page   WebCast   IM   Actions   Subscribers   Schedule   Track   Available values for use in message content:		
{Building} {Category} {Class} {CreatedByUser} {CreatedDate}		
Email Account to Send From: Workflow Email		
Email Reply Address (Optional):		
Message Subject:		
{IncidentNumber} with Class {Class}		
Message Text:		
<pre>{BEGIN*HTML} { table&gt;</pre>		
✓       Include reports as email attachments.         ✓       Email notifications should wait until reports are completed.		
<< <u>B</u> ack <u>N</u> ext >> Cancel <u>H</u> elp		

29. Feel free to edit the message subject, but do not edit text enclosed in curly brackets, such as **{AccessLevel}**. This text will be automatically replaced by data drawn from the specific record(s) triggering the event.

Note: If you have someone who knows HTML, have someone edit the Message Text but do not alter the curly brackets.

30. Select the **Subscribers** tab, and then select the **Standard** sub-tab.

Perspective Workflow - Application Events\Company Name\Events
<u>E</u> ile <u>E</u> dit <u>H</u> elp
🚽 Save and Close 🍟 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹
Event Description: Incident - Single - Class of 'X'
Description   Queries   Reports   Files   Copy   Email   Fax   Page   WebCast   IM   Actions   Subscribers   Schedule   Track
Standard Advanced
Add Subscriber
Users Targeted For Delivery
Subscriber Type Email Fax Copy Page WebCast IM
Computers Targeted For Delivery
Subscriber Type Copy IM
•
Control Con
Kext >>     Cancel     Help

31. Click Add Subscriber.

5	Perspective Workflow - Add	Subscribers	×
Place a checkmark next to the subscriber or group to notify			
	uters		
Add Su	ibscriber	Cancel	]

32. Select the users who will be receiving this e-mail.

#### 33. Click Add Subscriber.

Perspective Work	flow - Applic	cation Events\Company Name\Events
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
📕 Save and Close 🛛 📔 Save and New	v 🗙 <u>D</u> elete	◆ Previous ▼ ◆ Next ▼
Event Description: Inc	ident - Single - Cla	lass of 'x'
Description Queries Reports Files C	iopy   Email   Fax	Page WebCast IM Actions Subscribers Schedule Track
Standard Advanced		
	Add Su	Subscriber
	Users Targe	geted For Delivery
Subscriber	Туре	Email Fax Copy Page WebCast IM
Yushchyshyn, Dale	User	
	Computers Ta	argeted For Delivery
Subscriber		Type Copy IM
C-Remove Subscr	iber	<-Remove All Subscribers
<< <u>B</u> ack	<u>N</u> ext>>	Cancel <u>H</u> elp

34. Select the **Schedule** tab.

Perspective Workflow - Application Events\Company Name\Events
<u>Eile Edit H</u> elp
🔜 Save and Close 🕌 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹
Event Description: Incident - Single - Class of 'x'
Description   Queries   Reports   Files   Copy   Email   Fax   Page   WebCast   IM   Actions   Subscribers   Schedule   Track
Choose a schedule to use: Every Hour
Edit This Schedule Create New Schedule
- Scheduling Information:
Frequency:Every n Minutes, Minutes 60 Allowed Days:Monday Tuesday Wednesday Thursday Friday Allowed Months:January February March April May June July August September October November December
I Should this run on a holiday Add Dependency
The current event will be triggered if the following event(s) are triggered:
Application Event Description
<-Remove Dependency <<-Remove All Dependencies
<< <u>B</u> ack <u>N</u> ext >> Cancel <u>H</u> elp

a. Select an option for the **Choose a schedule to use** field (e.g., Every Hour, Every Monday at 9:00 AM, etc.).

Perspective Workflow - Application Events\Standard Event Pak - Cases\Events
<u>File E</u> dit <u>H</u> elp
🔚 Save and Close 📔 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹
Event Description: Case - Access Level of 'x'
Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track
Choose a schedule to use: Every 5 Minutes
Edit This Schedule Create New Schedule
Scheduling Information:
Frequency:Every n Minutes, Minutes 5 Allowed Days:Sunday Monday Tuesday Wednesday Thursday Friday Saturday Allowed Months:January February March April May June July August September October November December
Should this run on a holiday
Add Dependency
The current event will be triggered if the following event(s) are triggered:
Application Event Description
<-Remove Dependency <<-Remove All Dependencies
Kext >>     Cancel     Help

#### OR

- b. Click the Create New Schedule button.
  - i. In the **Schedule** field, enter a description for your new schedule.
  - ii. In the **Should not run until after date/time** field, enter a future date when events using this schedule will begin to run, or leave the field blank if you want the schedule to be activated immediately.
  - iii. In the **Frequency** field, choose an option for the schedule's rate of recurrence (e.g., Every n Minutes, Daily, Weekly, etc.); then, in the new field that appears below,

specify additional details for the frequency, such as the time of day for the event to run or the day of the week.

Perspective Workflow -		
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
Save and Close X Delete A Previous - Vext -		
Schedule: The 1st of Every Month at 00:01		
Description Allowed Range History		
Internal ID number: 40		
Schedule: The 1st of Every Month at 00:01		
Should not run until after date/time:		
Frequency Information:		
Frequency: Monthly		
Day Of The Month 1		
Daily time to run 00:01		
Notes:		
^		
v .		

iv. Under the **Allowed Range** tab, specify the months of the year, days of the week and hours of the day that the event is eligible to run. (Times are inclusive.)

<u>File</u> <u>E</u> dit <u>H</u> elp		
Save and Close X Delete	🔺 Previous 🔻 🌩 Next 💌	
Se	chedule: The 1st of Every Month at 00:01	
Description Allowed Range History		
Schedule will run on the following mon	ths:	
🔽 January	🔽 May	🔽 September
🔽 February	🔽 June	<ul> <li>October</li> </ul>
🔽 March	🔽 July	Vovember
🔽 April	🔽 August	🔽 December
Schedule will run on the following days	×	
🔽 Sunday	🔽 Wednesday	✓ Saturday
🔽 Monday	🔽 Thursday	
🔽 Tuesday	🔽 Friday	
Daily range begin time: 12:00:00 AM Daily range end time: 11:59:00 PM		

v. Click Save and Close.

35. Click **Save and Close**. The event is now activated and will run according to the specified schedule alerting the subscribers indicated.

Perspective Workflow - Application Events\Company Name\Events		
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
🔚 Save and Close 🍹 Save and New 🗙 Delete 🔺 Previous 👻 🕈 Next 👻		
Event Description: Incident - Single - Class of 'x'		
Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track		
Choose a schedule to use: The 1st of Every Month at 00:01		
Edit This Schedule Create New Schedule		
- Scheduling Information:		
Frequency:Monthly, Day Of The Month 1 Daily time to run 00:01 Allowed Days:Sunday Monday Tuesday Wednesday Thursday Friday Saturday Allowed Months:January February March April May June July August September October November December		
Should this run on a holiday		
Add Dependency		
The current event will be triggered if the following event(s) are triggered:		
Application Event Description		
<-Remove Dependency <remove all="" dependencies<="" td=""></remove>		
<< <u>B</u> ack <u>N</u> ext >> Cancel <u>H</u> elp		

36. Continue to apply these steps to all events you would like to activate.

Note: Please make sure you close any Workflow modules at the end of the day so that Workflow can do its nightly scheduled maintenance.

## **Contact Information**

### **Technical Support**

Toll Free:	1-877-776-2995
Phone:	(780) 448-0616
Email:	support@ppm2000.com

### PPM 2000

Toll Free:	1-888-PPM-9PPM (1-888-776-9776)
Phone:	(780) 448-0616
Fax:	(780) 448-0618
Email:	information@ppm2000.com
Website:	www.ppm2000.com