RESOLVER PERSPECTIVE WORKFLOW INSTALLATION GUIDE

Version 2.0

June 2015

Perspective by Resolver™

Perspective Workflow[™] Version 2.0

Distributed June 2015

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Resolver Inc	

Overview

Perspective Workflow[™] 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^{\dagger}

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 •

[†] 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® SQL Server® Management Studio.
- Run the database views script PWFDataViews_v2.0.sql against the Perspective database 2. 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.

Ø	ODBC D	ata Source	Administrate)r			? 🗙
Ū	ser DSN	System DSN	File DSN D	ivers Tracin	g Connectio	n Pooling Abo	ut
	System Da	ata Sources:					
	Name		Driver			Add	
						Remove	Ĩ
						Configure	
							_
	3	the indicate		A System da		now to connect sible to all users	to
_		[ОК	Cancel	Apply	Hel	р

3. Select SQL Server and click Finish.

Create New Data Source		
	Select a driver for which you want to set up a data Name Microsoft ODBC for Oracle Microsoft Paradox-Treiber (*.db.) Microsoft Paradox-Treiber (*.db.) Microsoft Text-Treiber (*.txt; *.csv) Microsoft Visual FoxPro-Driver Microsoft Visual FoxPro-Treiber 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**.

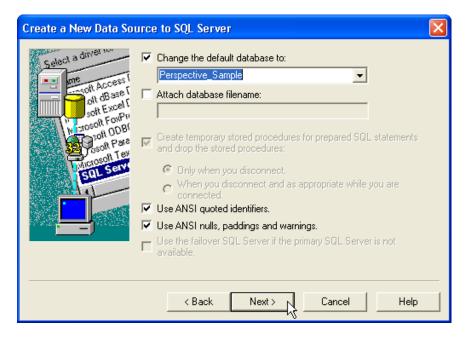
Create a New Data So	urce to SQL Server 🛛 🔀
Selact a dirivel tur me off Access f Soft Excel f Horosoft For Cont ODB Cont Tex Soft Excel Soft Ex	This wizard will help you create an ODBC data source that you can use to connect to SQL Server. What name do you want to use to refer to the data source? Name: 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 > 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 off dBase I off dBa	How should SQL Server verify the authenticity of the login ID?	
	< Back Next > Next > Cancel Help	

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



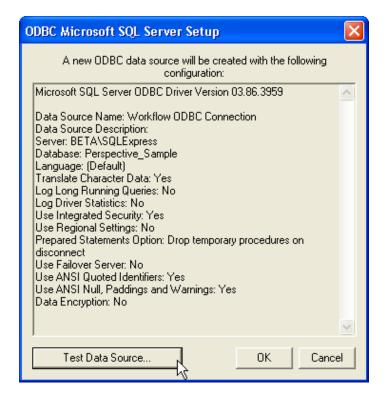
7. Ensure the **Use ANSI quoted identifiers** and **Use ANSI nulls, paddings and warnings** boxes are selected, and click **Next**.

8. Click Finish.

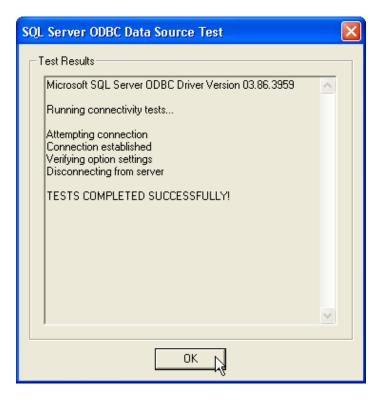
Create a New Data So	urce to SQL Server	K
Select a driver run off daser off daser in soft Access off daser in soft Foodrin Dasoft Foodrin Dasoft Foodrin Stat. Scrut	 Change the language of SQL Server system messages to English Use strong encryption for data Perform translation for character data Use regional settings when outputting currency, numbers, dates and times. Save long running queries to the log file: C:\DOCUME~1\RYAN~1.THI\LOCALS~1\Temp\ Browse Log ODBC driver statistics to the log file: C:\DOCUME~1\RYAN~1.THI\LOCALS~1\Temp\ Browse 	
	< Back Finish Cancel Help	



9. Click Test Data Source.



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





Workflow Installation

Double-click the PW_Setup_V82d.msi file located inside the Installation Files v1.0 folder; 1. then click **Run**.



2. Click Next.

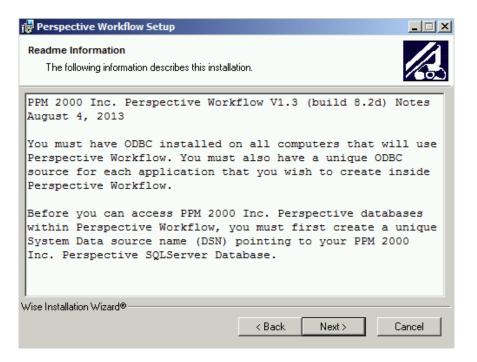




Select the I accept the license agreement radio button, and click Next. 3.

🙀 Perspective Workflow Se	tup		_ 🗆 🗙
License Agreement You must agree with the lic	ense agreement below to proceed.		
Please see PPM 2000 Terms & Conditions) Inc. Software Licence of use.	Ågreement	for
Wise Installation Wizard®	I accept the license agreement I do not accept the license agreement <u>R</u> eset < <u>B</u> ack	nent Next >	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	nation to personalize your installation.	
Full N <u>a</u> me:	Testing	
Organization:	PPM 2000 Inc.	
	oplication can be installed for the current user or for all u fou must have administrator rights to install the settings for cation for: Anyone who uses this computer	
	C Only for me (Testing)	
Wise Installation Wizard®	< <u>Back</u> <u>N</u> ext>	Cancel

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

🔂 Perspective Workflow Setup	<u>- </u>
Destination Folder Select a folder where the application will be installed.	
The Wise Installation Wizard will install the files for Perspective Workflow in the followin folder.	ıg
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® < Back Next> Car	ncel
< <u>Back</u>	

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®	Br <u>o</u> wse
<u>D</u> isk Cost <u>R</u> eset	< <u>B</u> ack <u>N</u> ext > Cancel

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

🙀 Perspective Workflow Setup		_ 🗆 🗡
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 >	Cancel

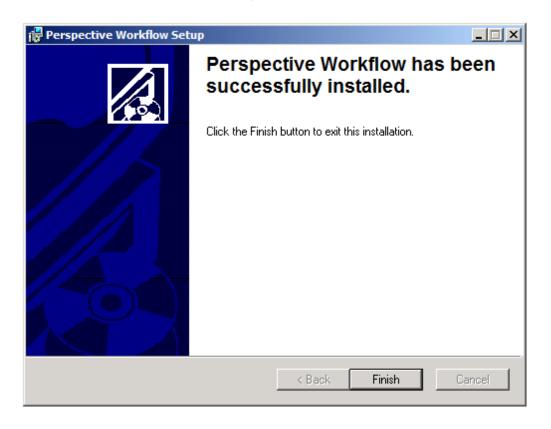
Note: The service needs to run using an account that has local admin rights to the server where workflow is installed.

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

Perspective Workfl	ow Setu	p			
Updating System					
The features you sel	ected are	currently being ins	talled.		
L					
	🌍 Usei	Account Contro	ol		×
	\bigcirc	Do you want to publisher to m	allow the following pro ake changes to this cor	ogram from an unk mputer?	nown
Wise Installation Wizard®		Program name: Publisher: File origin:	C:\PW_Setup_V82d\PW_S Unknown Downloaded from the Inte		
	-	Show details		Yes	No
			Chang	ge when these notific	ations appear

🚰 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.

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12. Navigate to the destination folder.

Note: The default location is C:\Program Files\Resolver 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.

 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 Installer	all	
		Cancel
IM SDK		
Please wait w	vhile Windows configures IN	I SDK
Gathering required in	formation	
		Cancel
Extracting Files		
Extracting riles		<u></u>
Extracting File:		
To Directory:	c:\d75937a1f0d310d	c0fba68597021de359



Licensing & Server Login Information

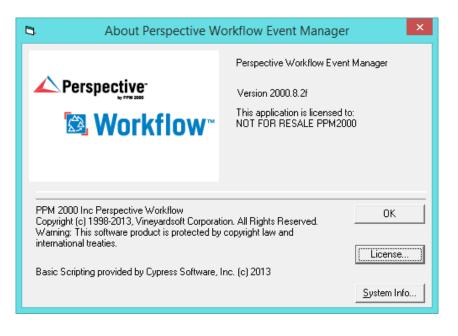
- 1. Open the Perspective Workflow Administrator. The application can generally be accessed through **Start > Programs > Perspective Workflow > Administrator**.
- 2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and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

В,	Perspective Workflow Administrator	×
	User Name: Admin Password:	
	OK Cancel	

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

7		
<u>F</u> ile <u>V</u> iew	Help	
🛛 🚭 Print 🛛 (<u>C</u> ontents	
Activity	PPM 2000 Inc. on the <u>W</u> eb	
	About Perspective Workflow Administrator	
Server Status	Activity	

4. Click the **License** button.





5. Enter the license information provided to you by Resolver and click **OK**, then **OK** again.

В,	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:		
	ОК		Cancel

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

-	
Eile <u>V</u> iew <u>H</u> el	p
🛛 🚑 Print 🛛 🛱 S	erver Login Information
Activity	User Access
Corrective Action	
Hardware Setup	Administration Folders
Software Setup	Activity ID Server

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**.)

B ,	Perspective Workflow Administrator	×
	User Name: Admin Password: *****	
	OK Cance	

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

7						
Eile Edit View	<u>H</u> elp					
New Email Ace	count 🛛 🚑 Print 🗙 Delete 🛛 🌆 Perform Ema	il Test				
Activity Corrective Action	Software Setup					
Hardware Setup	🕞 Administration Folders					_
Software Setup	Activity	ID	Description	Email Type	Download Email	
	Server Status					
<u>_</u>	Corrective Action					
Email Accounts	🗄 ቭ Hardware Setup					
100	Software Setup					
	Email Accounts					
Fax Accounts	Fax Cover Pages					
	🖗 Holiday Schedule					
	IM Accounts					
Fax Cover Pages	Twitter Accounts					
A)	🖉 Webcast Locations					
	🗄 🛁 User Access					
Holiday Schedule						

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 accounts, you must create a Perspective Workflow email account for each department. (Keep in mind that each event can only use one email account to send notifications from.)

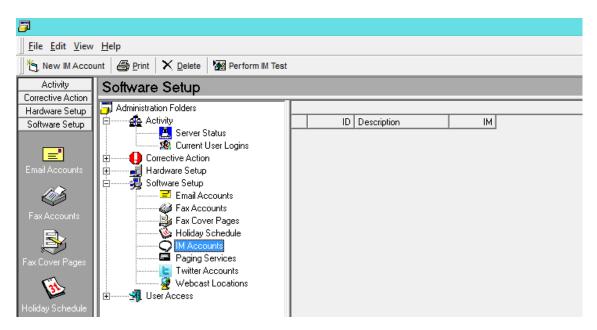
Perspective Workflow - Email Accounts
<u>File Edit H</u> elp
🔄 Save and Close 🍹 Save and New 🗙 Delete 🔺 Previous 🔹 🕈 Next 🔹
Email Account Description: Workflow Email
General Dial-Up Networking Email Response System Options (Incoming) History
Internal ID number: 2
Email Type: INTERNET 💌 Character Set: ascii 💌
Email Account Description: Workflow Email
Login Name, Mailbox or Profile Name:
Password:
Postoffice (Exchange, Notes or VIM only):
SMTP/POP Internet Email Information:
Outgoing mail (SMTP) server name: mail.company.com
SMTP From Name (required for INTERNET): Perspective Workflow <workflow@ppm2000.com></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

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



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

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.



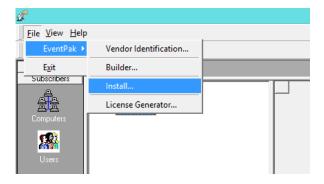
Q Perspecti	ve Workflow - IM Accounts
<u>F</u> ile <u>E</u> dit <u>H</u> elp	
🛃 Save and Close 🎽 Save and New 🛛 🗙	Delete 🔶 Previous 🔹 🕈 Next 📼
Instant Message Service Provide	r.
General History	
Internal ID number:	
Instant Message Service Provider:	Windows Live Messenger 🗸
Instant Message Account Description:	Windows Live
Username:	acmecorp@live.com
Password:	жжжж
	I Active
Notes:	
	^
	\sim

Workflow Event Pak Installation

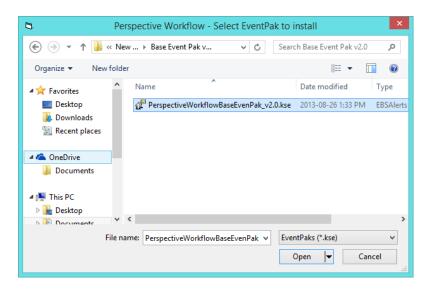
- 1. Open the Perspective Workflow Event Manager. The application can generally be accessed through **Start > Programs > Perspective Workflow > Event Manager**.
- 2. In the logon window, enter your administrator **User Name** and **Password**, then click **OK**. (The default User Name is **Admin** and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

₿,	Perspective Workflow Event Manager
	User Name: Admin
	Password: *****
	0K 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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5. Click Install.

Perspective V	Norkflow - 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				
		\sim		
The following App	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			
	Install as new application into folder-> Application Events			
Standard Event Pak - eIncidents	Install as new application into folder-> Application Events			
Install	Cance	əl		

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



- Select one of the Standard Event Paks under Application Events. 7.
- 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.

₫ [₽]							
<u> </u>	<u>File View H</u> elp						
New Applica	🎽 New Application 🛛 🏝 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 - Admin Standard Event Pak - Cases Standard Event Pak - Incidents Standard Event Pak - Incidents Standard Event Pak - Items Standard Event Pak - Organizations Standard Event Pak - Persons Standard Event Pak - Vehicles Standard Event Pak - Vehicles 						

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	ection 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.

Perspective	Workflow - Edit Connection
<u>F</u> ile <u>E</u> dit <u>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.
Cariat ADI Name	Remove parentheses from Link/Joins
Script API Name:	l
Script API Username:	l
Script API Password:	I

Subscriber Configuration

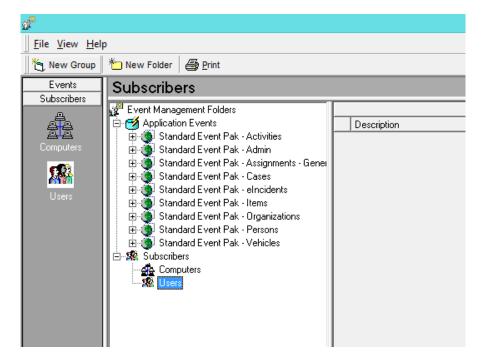
In Perspective Workflow, individuals who receive email notifications when events are triggered are known as "subscribers." Each event must have one or more subscribers associated with it, but before you can choose subscribers for each of your events, you must either manually create subscriber records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

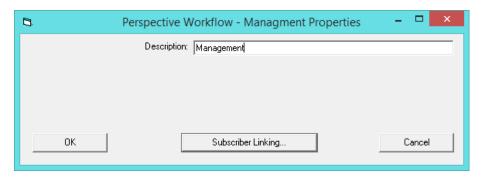
1. In Perspective Workflow Event Manager, expand the **Subscribers** node and select **Users**.



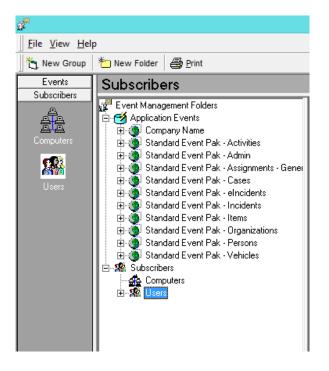
2. Click the **New Group** button in the top-left corner of the window.



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



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





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

18 F	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 👻 Wext 👻						
	Subscriber Name:						
Description Copy E	mail 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						
18.5	☐ Active						
History:	Item created by:						
	Item created on:						
	Item last changed by:						
	Item last changed on:						
<< <u>B</u> ack	<u>N</u> ext >> Cancel <u>H</u> elp						

- Select the Email tab, specify the subscriber's primary email address in Email Address 1 and, 6. 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.

Rerspective Workflow - Subscribers\Users\Managment								
<u>F</u> ile <u>E</u> dit <u>H</u> elp								
🔄 Save and Close Save and New 🗙 Delete 🔺 Previous 🔹 🔷 Next 🔹								
Subscriber Name:								
Description Copy Email Fax Page WebCast Instant Message Subscriptions								
Email Address1: sarajane.smith@acme.com								
			,	nith@acme.com				-
		mai naarosse.	iparajane.sn	ന്നയacme.con	II			
	Ple	ase select whi	ch Email Addr	ess to use at th	ne specified tim	ie:		
	1=Ema	ail Address 1, 2	2=Email Addre	ss 2, * = Both, \$	Space Bar for I	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	
2:00 AM	2	2	2	2	2	2	2	
2:30 AM	2	2	2	2	2	2	2	
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	
5:00 AM	2	2	2	2	2	2	2	
5:30 AM	2	2	2	2	2	2	2	
6:00 AM	2	2	2	2	2	2	2	-
Restore Def	aults	Use Addre:	ss1 for All	Use Add	ress2 for All	Use	Both for All	
<< Back Next >> Cancel Help								

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

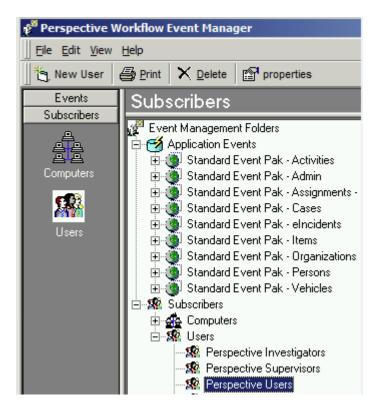
18	Perspective Workflow - Subscribers\Users\Managment								
<u>F</u> ile	<u>File E</u> dit <u>H</u> elp								
	Save and Close 🔛 Save and New 🗙 Delete 🔺 Previous 🔻 🕈 Next 🔻								
	Subscriber Name:								
	Subscriber Name:								
Des	Description Copy Email Fax Page WebCast Instant Message Subscriptions								
	Instant Message Service Provider 1:								.
									-1
				Tografano.on	nith				_
	Instant	Message Serv	vice Provider 2	: [-
	li I	nstant Messag	je Username 2	sarajane.sn	hith				
			_						
		ŀ	Please select v	which Name to	use at the spe	cified time:			
			1=Name1, 2	2=Name2, * =	Both, Space B	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	7 11
	1:30 AM	2	2	2	2	2	2	2	7 11
	2:00 AM	2	2	2	2	2	2	2	- 11
	2:30 AM	2	2	2	2	2	2	2	- 11
	3:00 AM	2	2	2	2	2	2	2	1 11
	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	-
	Restore Defa	ults	Use Name	1 for All	Use Nan	ne2 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

1. 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.



Click the Subscriber Linking button. 2.

B ,	Perspective Workflow - Perspective Users Properties – 🗖 🗙
	Description: Perspective Users
ОК	Subscriber Linking Cancel



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

В,	Perspective Users Sub	scr	riber Linking 🛛 🗕 🗖 🗙						
the whic proc	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.								
	Select Query								
	Subscriber Linking Fie	eld [Definition	٦					
	Subscriber Field		Linked to Database Field	-					
	Subscriber Name	=							
ŕ	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 2	=							
	Copy Location 1	=							
	Copy Location 2	=							
		_							
	OK Remove Subscribe	er Li	nk 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	cel	
		Can		

Resolver Inc. Confidential. Do not distribute.

5. Select Admin – All Users with Primary Email.

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

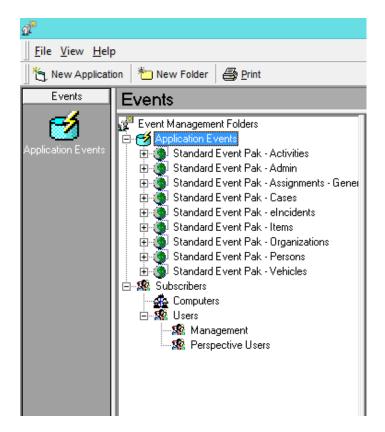
Note: This will link only to each subscriber's primary email address in Perspective (the email address that appears in the subscriber's **Person** record with the **Primary** box checked.)

۵,	Perspective Users Sub	scr	iber 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.					
Ad	min - All Users			Select Query	
	Subscriber Linking Fie	ld D)efinition		
	Subscriber Field		Linked to Database Field		
	Subscriber Name	=			
	Last Name	=	LastName		
	First Name	=	FirstName		
	Title	=			
	Company Name	=			
	Phone Number	=			
	Computer Name	=			
	IP Address	=			
	Email Address 1	=	EmailAddress		
	Email Address 2	=	EmailAddress		
	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 2	=			
	Copy Location 1	=			
	Copy Location 2 =				
	OK Remove Subscribe	r Li	nk	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 Workflow - New Application	- 🗆 ×
	New Application Company Name	
Connection to Use For D	Patabase Access:	
PerspectiveConnection	•	Edit Connection
		New Connection
ОК		Cancel

4. Click **OK**.

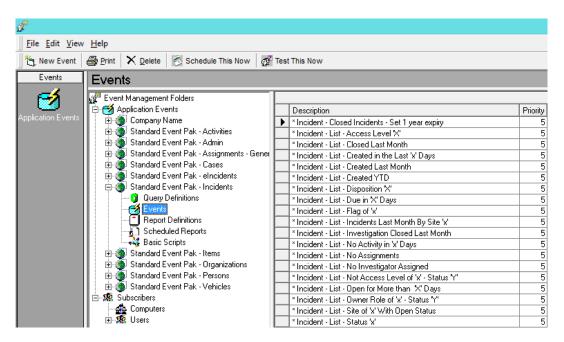
Event Configuration

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'**.

Perspective Workflow - Application Events∖Standard Event Pak - Incidents∖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 Internal ID number: 3213
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 last changed on: 2014-06-30 11:20:48 AM
Notes:
A
<< Back Next >> Cancel Help

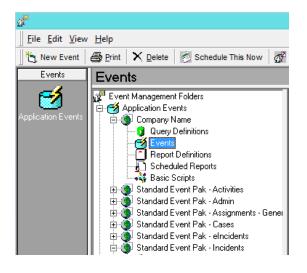
- 3. Double-click the Event to open it.
- 4. Click the Queries tab.

Perspective Workflow	- Application Events\Standard Eve	ent Pak - Incidents\Events	
<u>File 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 Fi	les Copy Email Fax Page WebCast IM	Actions Subscribers Schedule Track	
	Queries Selected For Co	ontent	
	lication Query Description		
Add Query 🕨 Star	ndard Event Pak - Incident - Class 'x'		
Use Script instead of Query Script: Select Script			
	<-Remove Query	<<-Remove All Queries	
	Event Trigger Parameters		
Question		Answer	
What Class value would you like			
How far back would you like to search?			
<< <u>B</u> ack	Next >> Cancel	Help	

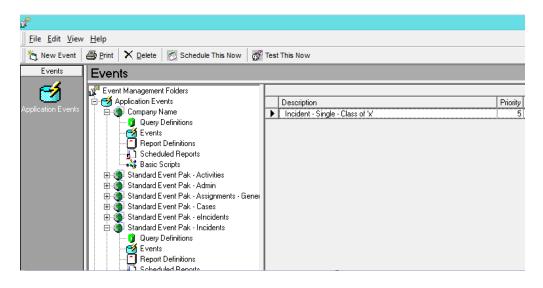
- 5. Make a note of the query it is using.
- 6. Close the window.
- Highlight the Event and CTRL + C. 7.

🗄 📲 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'.

g e			
Eile Edit View H	elp		
🏷 New Query Defini	ition 🖨 Print 🗙 Delete		
Events E	Events		
	Event Management Folders Application Events Company Name Query Definitions Report Definitions Scheduled Reports Scheduled Reports Scheduled Scripts Standard Event Pak - Activities Standard Event Pak - Admin	Description * Incident - Access Level X' Incident - Blank Dutcome with Status Closed Incident - Blasiness Unit Level 1 of X', Level 2 Y' Incident - Business Unit Level 1 of X', Level 2 Y', Level 3 Z' Incident - Business Unit Level 1 of X', Level 2 Y', Level 3 Z', Level Incident - Class X' Incident - Class X', Category Y'	Unique IncidentID IncidentID IncidentID IncidentID IncidentID IncidentID IncidentID
	Standard Event Pak - Assignments - Gener Standard Event Pak - Cases Standard Event Pak - Cases Standard Event Pak - Incidents Standard Event Pak - Standard Events Standard Events Standard Event Pak - Items	* Incident - Class W, Category Y', Subcategory Z' * Incident - Closed Incidents * Incident - Closed Incidents - No Expiry * Incident - Closed Last Month * Incident - Created in the Last X' Days * Incident - Created Last Month * Incident - Created YTD * Incident - Disposition X' * Incident - Due in X' Days * Incident - Elan of V	IncidentID IncidentID IncidentID IncidentID IncidentID IncidentID IncidentID 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.

₫ [₽]			
<u>File Edit V</u> iew	<u>H</u> elp		
New Query D	Definition 🛛 🚑 Print 🛛 🗙 Delete		
Events	Events		
1	Event Management Folders		
	🖻 🥳 🎒 Application Events	Description	Unique
Application Events	Company Rame	Incident - Class 'x'	IncidentID
	📃 🖳 🗊 Query Definitions		
	Events		
	Report Definitions		
	Scheduled Reports		
	🚽 📲 Basic Scripts		
	🗄 🕘 Standard Event Pak - Activities		
	🗄 🛞 Standard Event Pak - Admin		
	🗄 👜 Standard Event Pak - Assignments - Gener		
	🕀 🗿 Standard Event Pak - Cases		
	🗄 🝈 Standard Event Pak - elncidents		
	📗 🗄 🛣 erandard Erran Dati - taatidania		

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

Perspective Workflow - Application Events\Company Name\Events
Eile Edit Help
🛃 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
Cive 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 Workflow - Application Events\Compa	ny 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 A	ctions Subscribers Schedule Track	
Queries Selected For Con	tent	
Application Query Description		
Add Query Standard Event Pak - Incident - Class 'x'		
Use Script instead of Query Script: Select Script		
Event Trigger Parameters		
Question	Answer	
What Class value would you like to filter by?		
How far back would you like to search?		
<< <u>B</u> ack <u>N</u> ext >> Cancel	Help	

- 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
•		•
Select	New Query	Cancel

- 25. Select Incident New Incident Query.
- 26. Click Select. Note: The application changes.



Application Events\Compa	any 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 Queries Reports Files Copy Email Fax Page WebCast IM A	Actions Subscribers Schedule Track	
Queries Selected For Cor	ntent	
Application Query Description		
Add Query Company Name Incident - Class 'X'		
Use Script instead of Query Script. Select Script		
<-Remove Query	<<-Remove All Queries	
Event Trigger Parameters		
Question	Answer	
What Class value would you like to filter by?		
How far back would you like to search?		
<< <u>B</u> ack <u>N</u> ext>> Cancel	Help	

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.

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

Perspective We	orkflow - Application Events\Con	npany Name\Events
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
📕 Save and Close 🛛 📔 Save and	New 🗙 Delete 🔺 Previous 🔹 🕈 Ne	ext 👻
Event Description:	Incident - Single - Class of 'x'	
Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track		
	Queries Selected For	Content
	lication Query Description	
Add Query 🕨 Star	ndard Event Pak - Incident - Class 'x'	
Use Script instead of Query	Script:	Select Script
	<-Remove Query	<<-Remove All Queries
	Event Trigger Parameters	
Question		Answer
What Class value would you like to filter by? Criminal		
How far back would you like to	search?	
<< <u>B</u> ack	Next >> Cancel	Help

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>File 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 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} {BEGIN+HTML} </pre> <pre> <pre> <pre> <pre> <pre> <pre> <pre> <pre> <pre> <pre> <pre> <!--</td--></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></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>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
Standard Advanced
Add Subscriber
Users Targeted For Delivery
Subscriber Type Email Fax Copy Page WebCast IM
Computers Targeted For Delivery
Subscriber Type Copy IM
4 ↓
<-Remove Subscriber
<< Back

31. Click Add Subscriber.

B ,	Perspective Workflow - Add Subscribers
	Place a checkmark next to the subscriber or group to notify
	ers mputers ers Management Perspective Users
A	Subscriber Cancel

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



33. Click Add Subscriber.

Perspective Work	flow - Applicatio	on Events\Company Name\Events	×
<u>F</u> ile <u>E</u> dit <u>H</u> elp			
📕 Save and Close 🛛 📔 Save and New	v 🗙 Delete 🔺 P	Previous 🔹 🕈 Next 🔹	
Event Description: Inc	ident - Single - Class of '	f 'X'	
Description Queries Reports Files C	opy Email Fax Page	ge WebCast IM Actions Subscribers Schedule	Track
Standard Advanced			
	Add Subscri	xiber	
	Users Targeted F	I For Delivery	ו ור
Subscriber		mail Fax Copy Page WebCast IM	
Yushchyshyn, Dale	User 🔽		
	Computers Targete		
Subscriber		Туре Сору ІМ	-11 1
	iber	<remove all="" subscribers<="" td=""><td></td></remove>	
<< <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>File</u> <u>E</u> dit <u>H</u> elp		
Save and Close Save and New X Delete A 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:		
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		
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		
Eile Edit Help		
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		

OR

- b. Click the Create New Schedule button.
 - In the **Schedule** field, enter a description for your new schedule. i.
 - 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.



Per	spective Workflow -
<u>F</u> ile <u>E</u> dit <u>H</u> elp	
Save and Close X Delete A Previou	is 🔻 🛡 Next 👻
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:	
Notes.	
	^
	~

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.)

	Perspective Workfl	ow -
<u>F</u> ile <u>E</u> dit <u>H</u> elp		
Save and Close X Delete	🔺 Previous 🔹 🕈 Next 🔹	
	Schedule: The 1st of Every Mo	nth at 00:01
Description Allowed Range	History	
Schedule will run on the following	g months:	
🔽 January	🔽 May	🔽 September
🔽 February	🔽 June	Cotober
🔽 March	🔽 July	Vovember
🔽 April	🔽 August	✓ December
Schedule will run on the following	g 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.
- 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

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