VERSION 2.0

FEBRUARY 19, 2019

Apps for Greentree

ALERT RULE UTILITY

APP NUMBER: 010070

Powered by:

MYOB Greentree

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FEATURES

The **Alert Rule Utility** App lets you easily manage all Alert rules by providing an enquiry function on all Alert rules. The enquiry shows what tabs of the rule maintenance are used, whether the rule is active, and if it runs on a schedule.

You can drill from any form within Greentree and find out if there are active rules for the class of object. This will include rules that are against classes updated within the main one e.g. The AP Invoice form will also display rules against an INAPLineItem.

Rules can also be grouped using a tree. Often implementing a solution requires more than one rule and can include rules on multiple classes. The rule tree maintenance lets you see all rules that belong to particular branch or project.

Rule history has been added. Any time a rule is edited you are prompted to enter notes on what was changed. Even if you don't enter details a record is still kept noting that the rule was changed with the user name, date and time.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: Alerts and Approvals

Associated Apps: 010022 – Object Drill Down

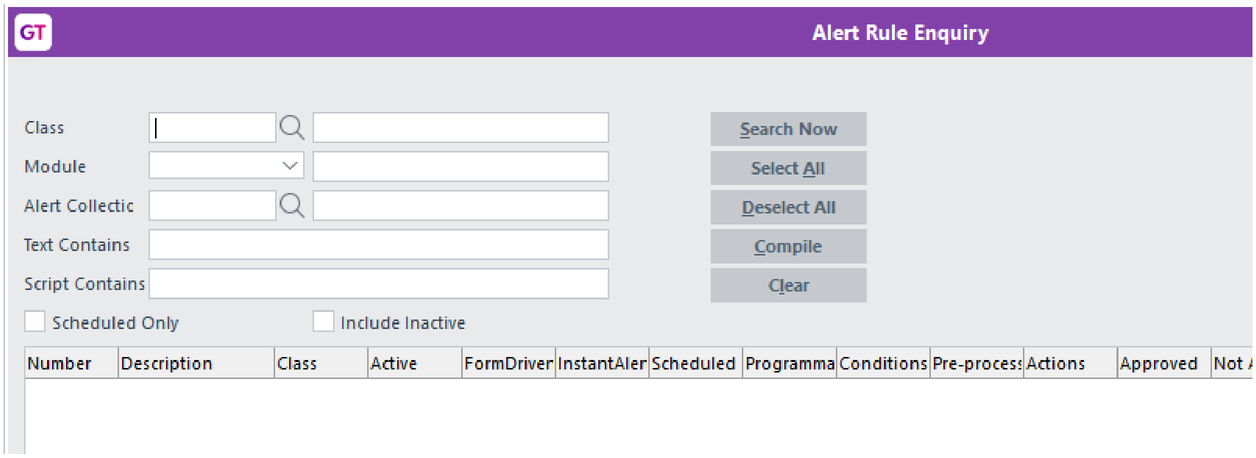
USER INSTRUCTIONS

ALERT RULE ENQUIRY

Provides an enquiry function on all Alert rules setup within a system. The enquiry shows what tabs of the rule maintenance are used, whether the rule is active, and if it runs on a schedule.

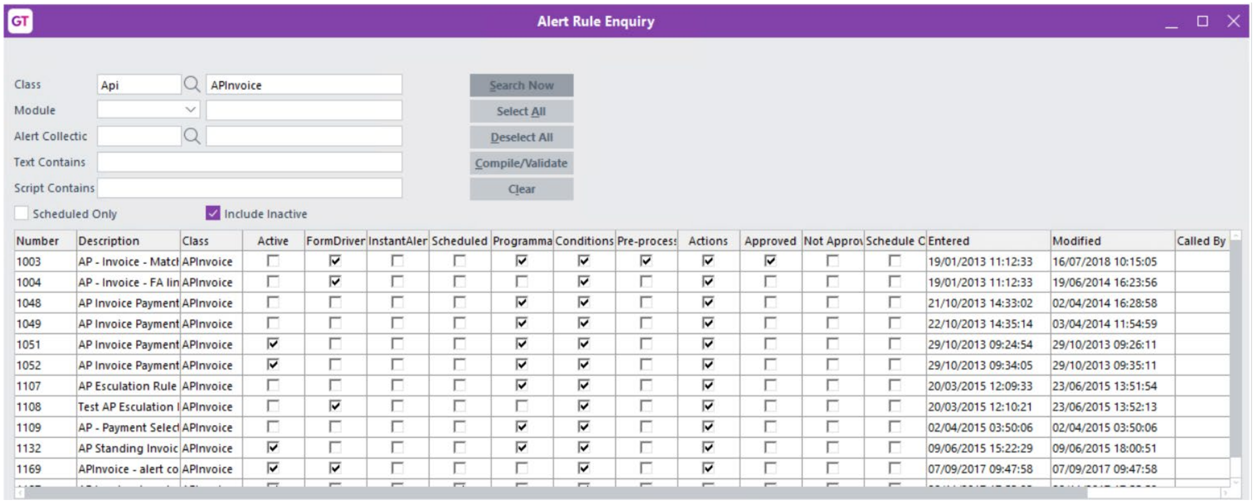
Select the menu option Workflow | Approvals and Alerts | Rule Enquiry.

1. Enter the selection criteria for displaying Alert rules. If all criteria are left blank then all rules will be displayed.

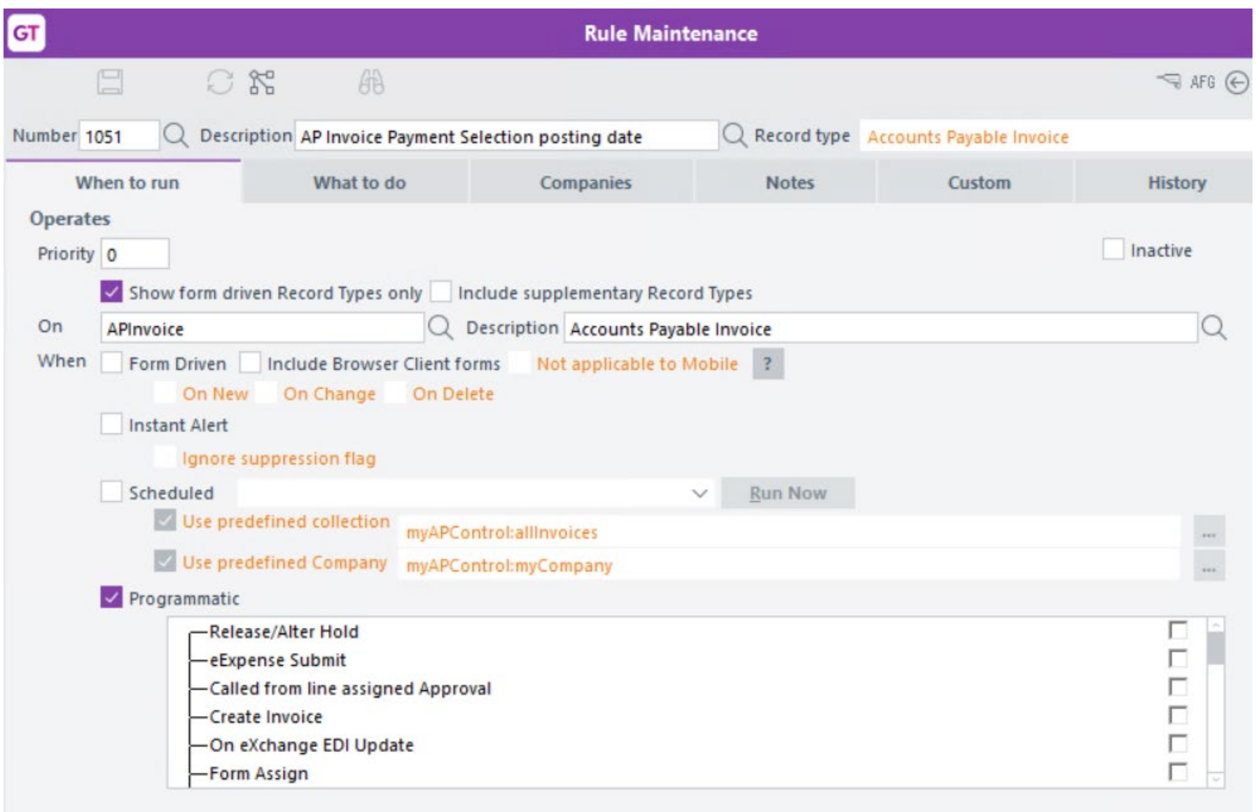


Class	Select the class the rule is entered against. You can type a few characters and then drop down to find the correct class.
Module	Select the module the rule is based on from the drop down list.
Alert Collection	To find out what rules are updating a desktop collection, select the collection from the search field.
Text Contains	Type in some text you would expect to be in the name of the rule.
Scheduled Only	Tick to only include rules that have been scheduled
Include Inactive	Tick to include inactive rules.
Search Now	Click this button to display the rules that meet the criteria
Select All	This will select all rules displayed in the table, they can then be Compiled.
Deselect All	Will unselect all rules and allow you to manually select the ones you want to Compile.
Compile	Click this button to compile selected rules. A message will be displayed if any rules have errors.
Clear	Will clear previously entered criteria.

2. Once the rules that match the criteria are displayed, you can double click to drill into them.

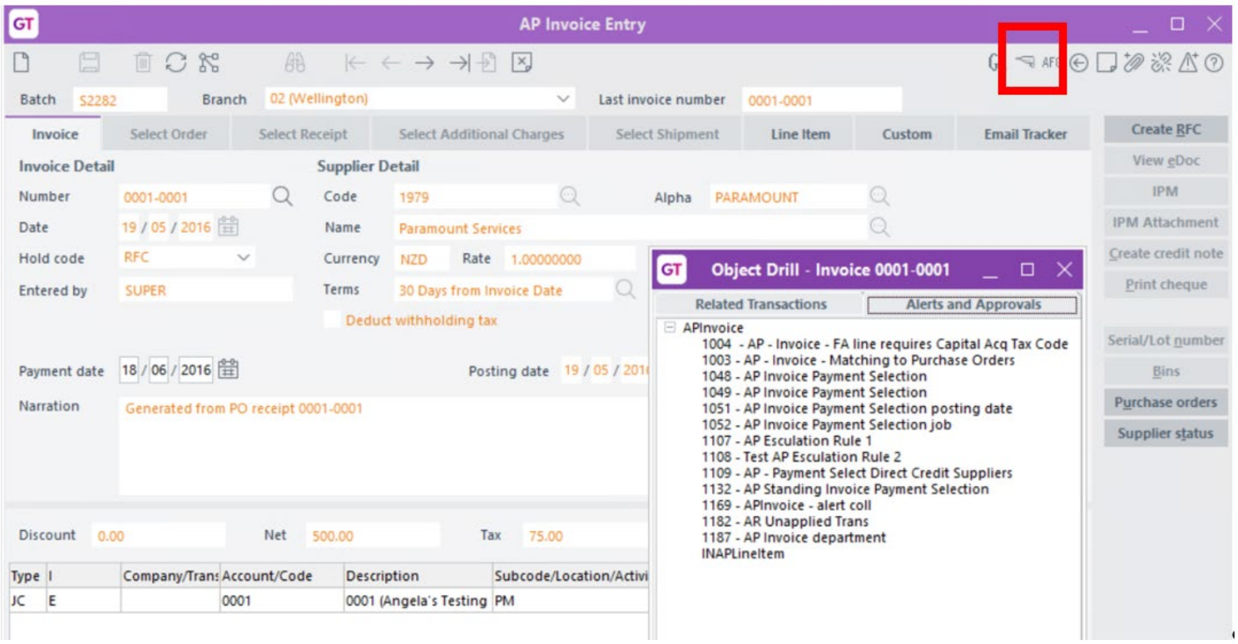


3. If you then click onto a different rule in the original enquiry table, the rule displayed will update. If you double click onto a new rule a second rule maintenance window will open.



ALERT RULE DRILL

From any form within Greentree you can click on the App Drill icon to find out if there are any alert rules running for that class or any related class.



The drill is also used to drill down to related transactions so if you have that App turned on you get two tabs, if you only have the Alert Rule Utility there will be only be one tab.

The tab also shows related classes – INAPLineItem in the above screen shot. If that class had any rules against it there would be a plus sign displayed so that you can also click the plus and see those rules.

You can double click to drill into a rule.

ALERT RULE TREE

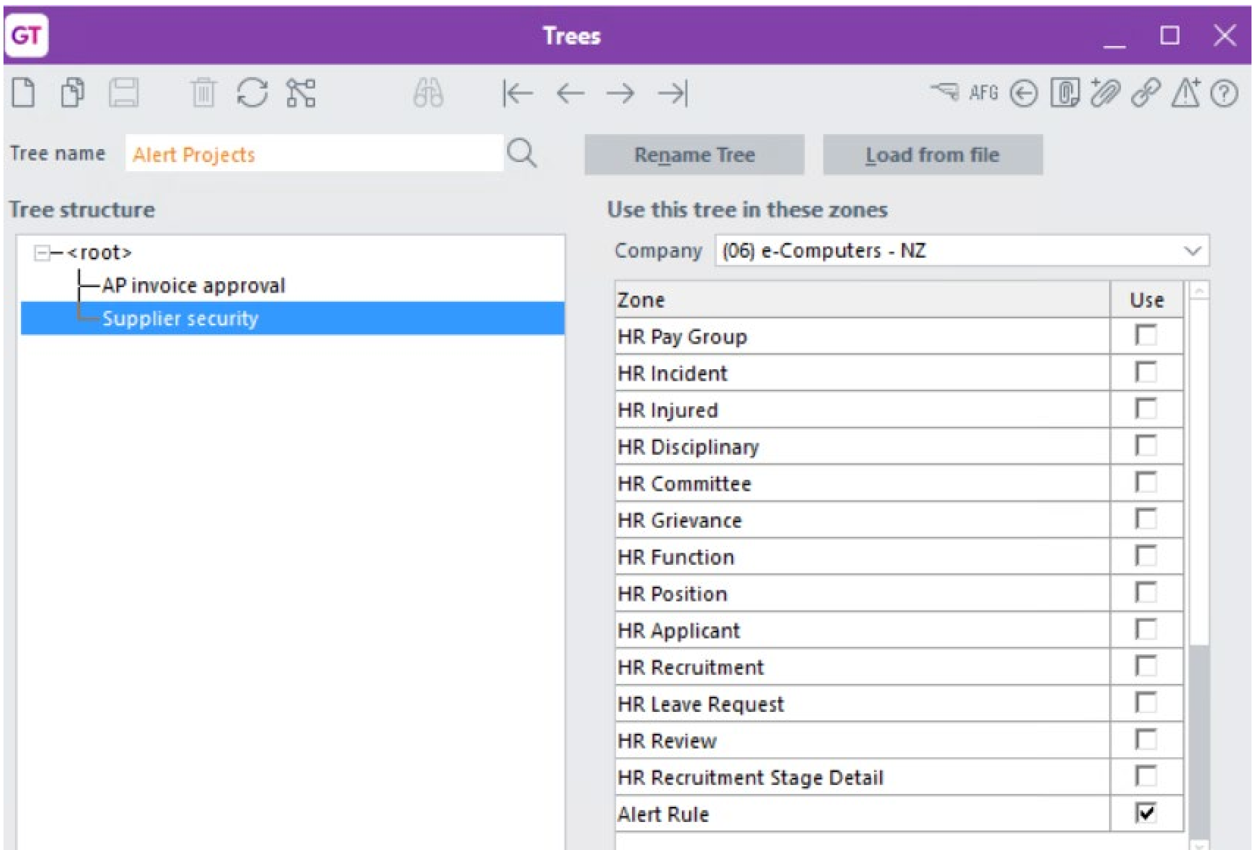
From any form within Greentree you can click on the App Drill icon to find out if there are any alert rules running for that class or any related class.

Often when you are implementing a solution using Alert rules, more than one rule is required. When you enquire on a rule it is hard to tell whether it works alone or runs in conjunction with something else. We have enabled the ability to group rules using trees.

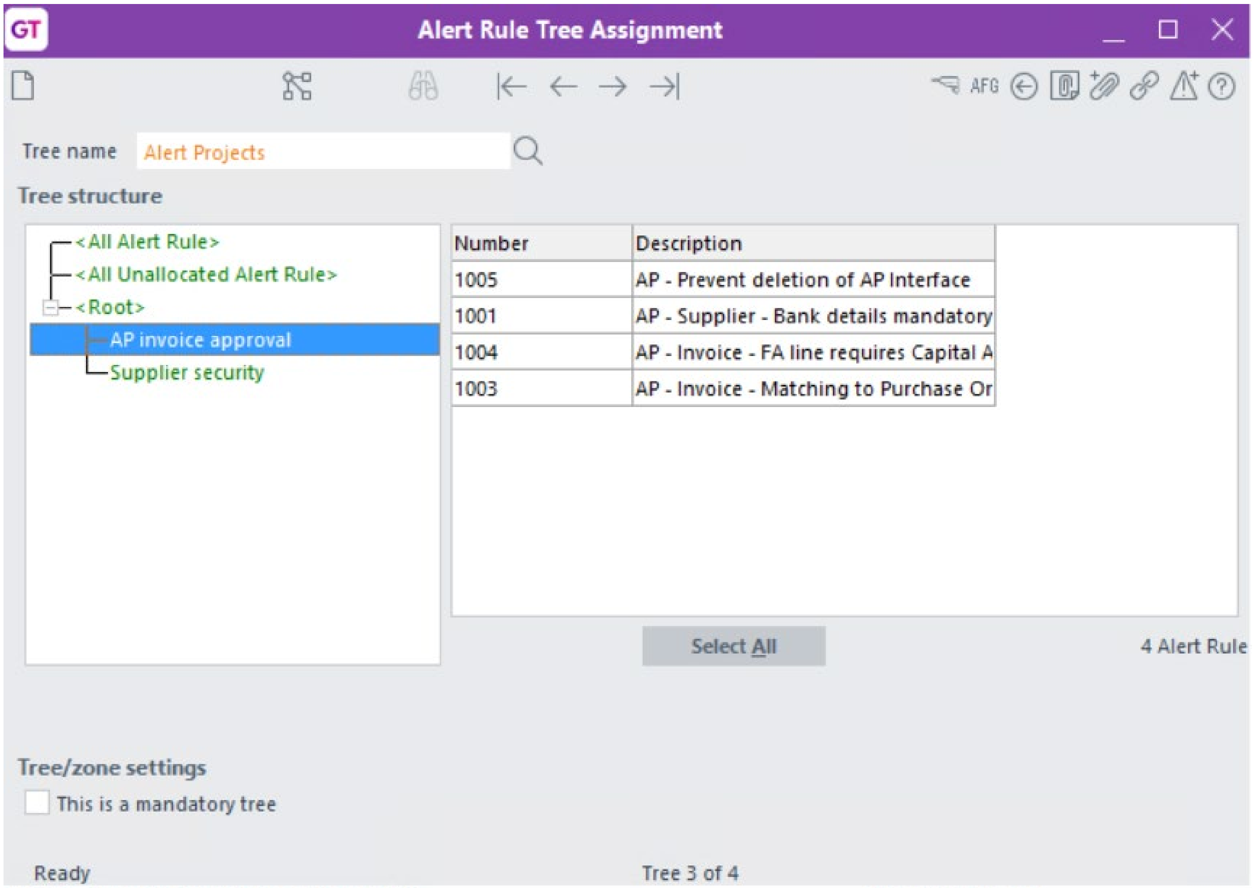
1. Select the menu item | System | Trees | Tree Maintenance |

   We recommend having a single tree with a branch for different projects however if a rule is used by more than one project this won't work and you will have to have multiple trees.

   On the right hand side tick to say the tree is used for Alert Rule zone.



2. Select the menu item | Workflow | Approvals and Alerts | Rule Tree Maintenance |



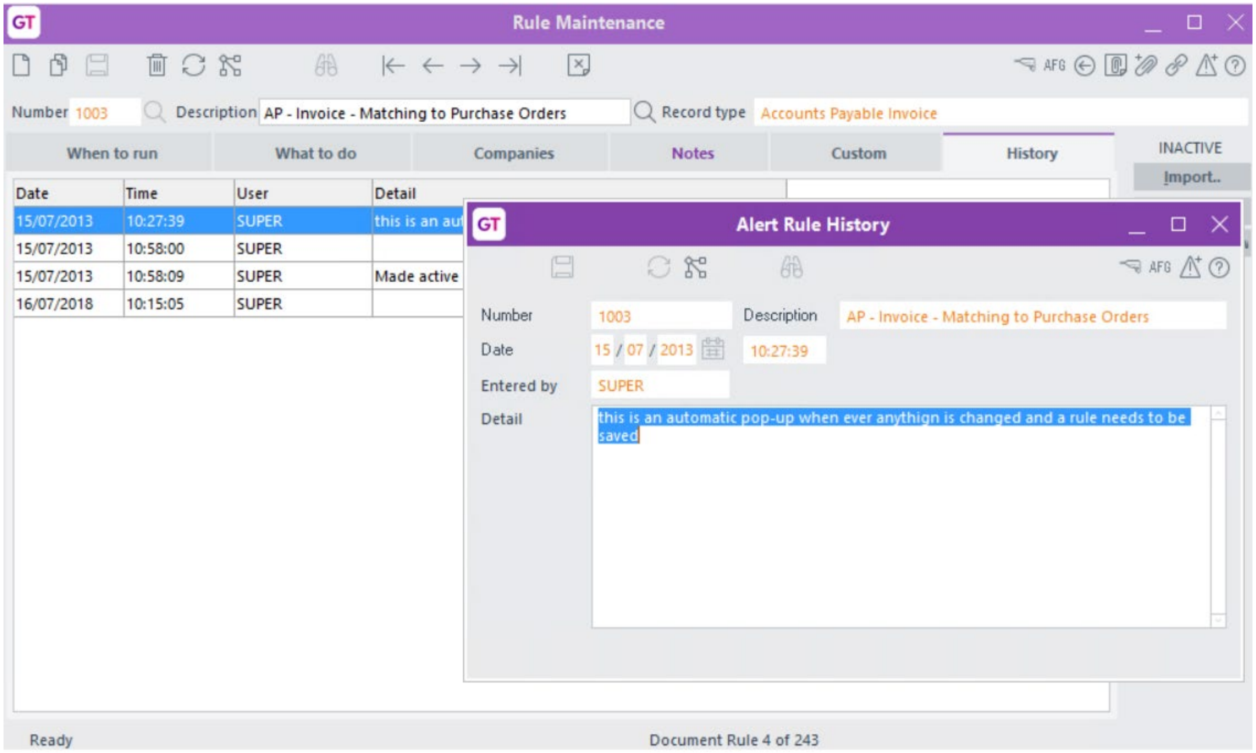
The Alert Rule Tree Assignment works as per all other modules. Unassigned rules can be dragged from the unallocated branch to the appropriate project branch.

When you are maintaining your rule you can click on the Custom tab then drill into the appropriate project tree and assign the rule to a branch.

ALERT RULE HISTORY

When you have multiple consultants working on a site, or a site is re-assigned to a new consultant, or if the client themselves are editing rules, it can be difficult to know what has changed and why. We have now introduced a prompt to fill out some rule history notes whenever a change is made.

1. Select the menu item | Workflow | Approvals and Alerts | Rule Maintenance |



If a rule is changed and the Save button is activated, when you click save an Alert Rule History window is displayed.

We recommend that details of what the change was are typed into the detail area. You can close the box without typing but we still record that a change was made.

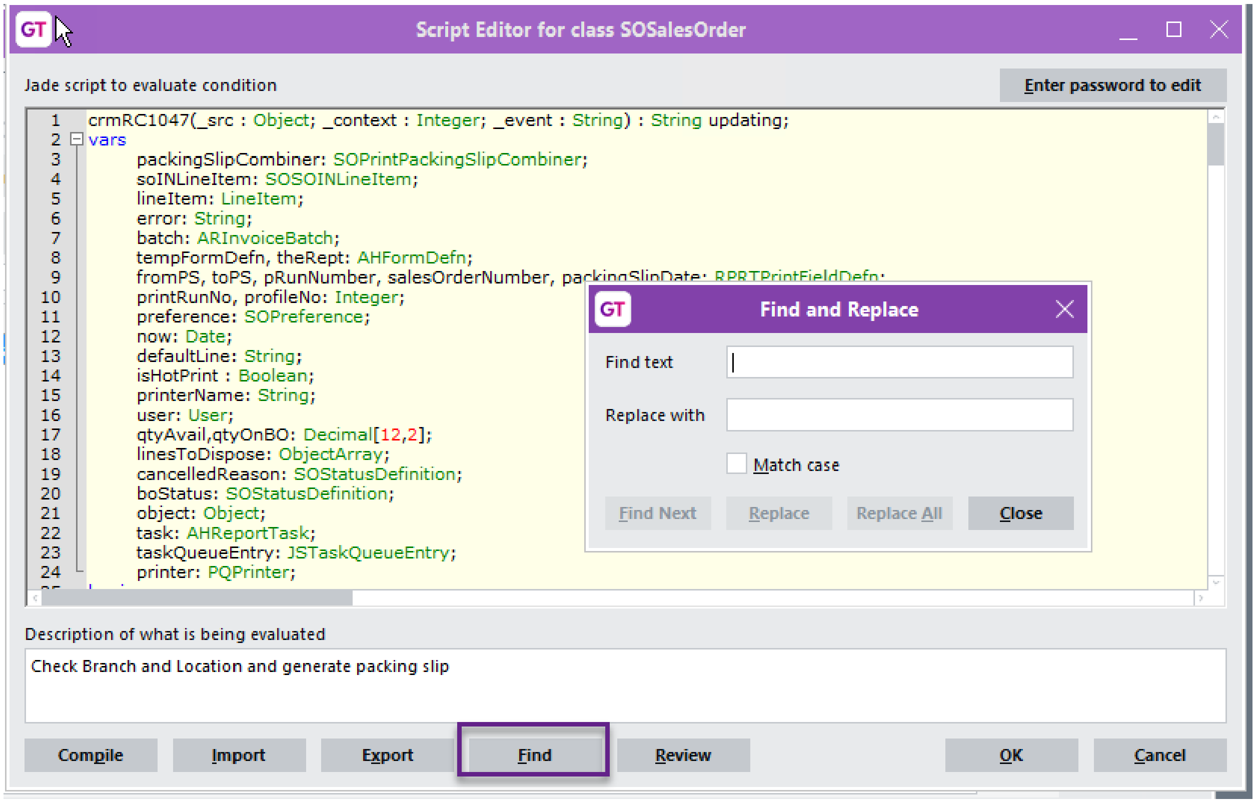
On the History tab you can view the date, time and users who have made changes to the rule. Where they save without typing any detail we still have the data time and user per line 2 above.

ALERT RULE ENHANCEMENTS

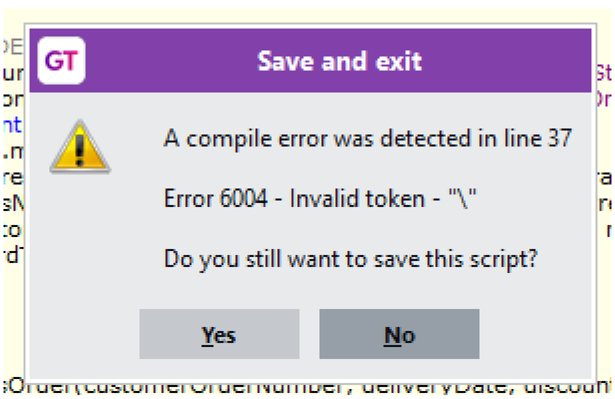
This app provides a selection of tools for when maintaining alert rules.

These are primarily designed to aid development.

- The "Script Editor" window for Custom Scripts on CRMDocumentRule classes can optionally be displayed non-modally. See App Configuration for how this is used. With non-modal enabled, extra buttons for Save and Save & Exist are available, instead of just OK to save and close.
- The Find button allows searching for and optional replacement of text in the script editor panel.
- The Ctrl+F key combination in the script editor panel will display the "Find and Replace" dialogue. This is equivalent to using the Find button.

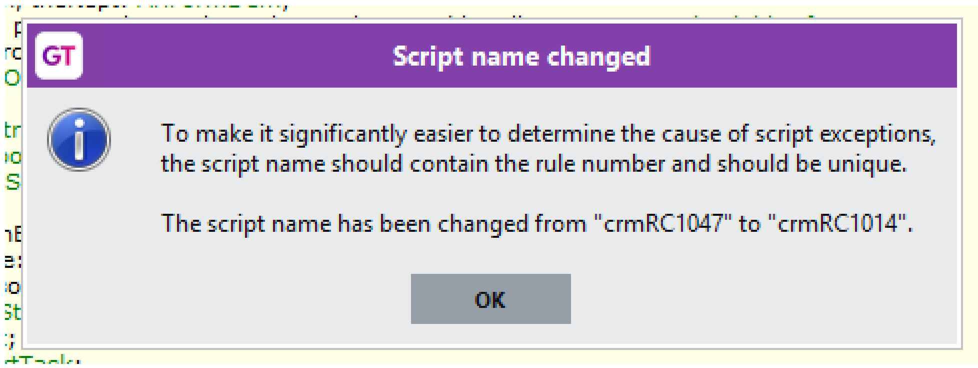


- The Review button will perform a code check in the script editor panel – the results are displayed in a Jade Interpreter window.
- When the "Save", "Save & Exit" or "OK" buttons are clicked, a test compile is performed before the script is saved. If a compile error is detected, a dialogue will ask the user if they still want to save the script despite the compile error.



Warning - If you say No, the script window is closed and the change is not saved.

- The Ctrl+T key combination in the script editor panel will insert a formatted mod marker where the cursor is.
- The app will rename scripts (signature) so that the name reflects the number of the rule the script is for. That is to make it easier to track down the cause of exceptions. The rename is also performed when script code is imported into the Script Editor.

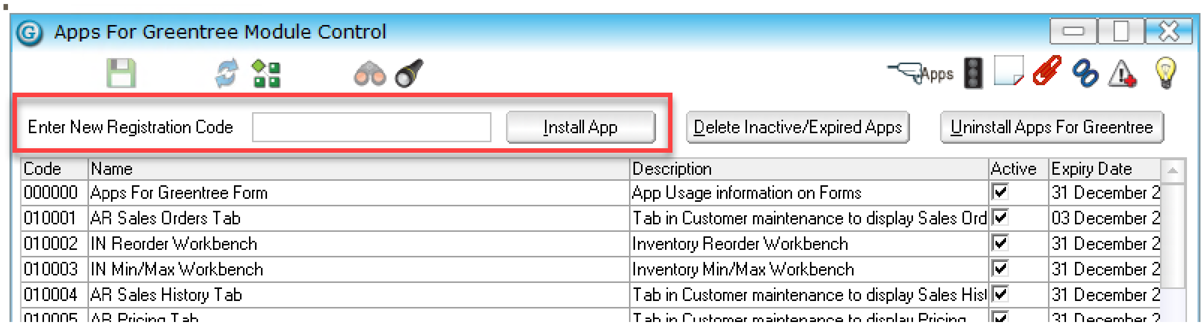

GT
Script name changed
To make it significantly easier to determine the cause of script exceptions, the script name should contain the rule number and should be unique.
The script name has been changed from "crmRC1047" to "crmRC1014".
OK

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Alert Rule Utility App.
5. Click on the Edit Users button and select the users who will be configured to use Alert Rule Utility, for which companies.
6. Save and Close the form.
7. Log out and in again to activate the associated menu options.

APP CONFIGURATION

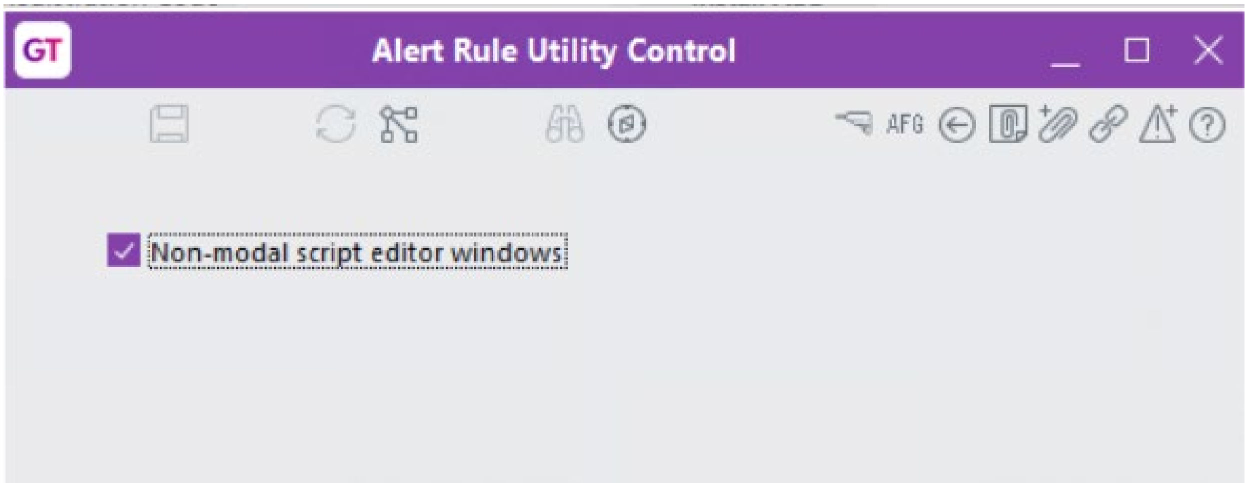
1. Select/Highlight the Alert Rule Utility App.
2. Click on the Change button

Ticking this checkbox allows the script editor window to be non-modal.

This feature allows the user to leave the Script Editor displayed, set focus back to the "Rule Maintenance" window, and to work with that window.

An example would be to test the script being edited via the "Run Now" button. Upon returning to the Rule Maintenance window, the user can display the Script Editor for a different script if desired. If the Rule Maintenance window is closed while Script Editor windows launched from it are still visible, those Script Editor windows will be closed (the user prompted if there are unsaved changes).

If the Script Editor window is displayed non-modally, "Save" and "Save & exit" buttons will be displayed instead of the usual "OK" button.


Alert Rule Utility Control
AFG
Non-modal script editor windows