VERSION 2.0 FEBRUARY 19, 2019

# Apps for Greentree

# ALERT RULE UTILITY

APP NUMBER: 010070

Powered by:

MYOB Greentree

#### **TABLE OF CONTENTS**

Features	2
Important Notes	2
Other Requirements	2
User Instructions	3
Alert Rule Enguiry	3
Alert Rule Drill	5
Alert Rule Tree	6
Alert Rule History	7
Alert Rule Enhancements	
Implementation Guide	11
	11
	11
	ΤT

# **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

#### 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.

GT				Alert Rule Enquiry							
Class					Search Now	1					
Module ~					Select <u>A</u> ll						
Alert Collectic					Deselect All						
Text Contains					Compile						
Script Contains					Clear						
Scheduled Only	Include Inactive	:									
Number Description Clas	s Active	FormDriver	InstantAler	Scheduled	Programma	Conditions	Pre-process	Actions	Approved	Not /	

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.

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Class	Арі	Q APIn	oice			1	Search Now									
Module		$\sim$					Select All									
Alert Colle	ctic	Q				1	Deselect All									
Text Conta	ins						<u>C</u> ompile/Valida	te								
Script Con	tains						Clear									
Schedu	led Only	🔽 Ind	lude Inacti	ve												
Number	Description	Class	Active	FormDrive	InstantAle	r Schedul	ed Programma	Condition	s Pre-process	Actions	Approved	Not Appro	Schedule	CEntered	Modified	Called By
1003	AP - Invoice - Matc	APInvoice		~		Г	₹	•	1	₹	1			19/01/2013 11:12:33	16/07/2018 10:15:05	
1004	AP - Invoice - FA lin	APInvoice	Г	<b>V</b>				~		•				19/01/2013 11:12:33	19/06/2014 16:23:56	
1048	AP Invoice Payment	APInvoice				Г	<b>v</b>	~		₹				21/10/2013 14:33:02	02/04/2014 16:28:58	
1049	AP Invoice Payment	APInvoice	Г				<b>V</b>	~	Г	1				22/10/2013 14:35:14	03/04/2014 11:54:59	
1051	AP Invoice Payment	APInvoice	~					~		•				29/10/2013 09:24:54	29/10/2013 09:26:11	
1052	AP Invoice Paymen	APInvoice	~				~	~		₹	Γ			29/10/2013 09:34:05	29/10/2013 09:35:11	
1107	AP Esculation Rule	APInvoice	Г	Г			<b>V</b>	~		•	Г	Г		20/03/2015 12:09:33	23/06/2015 13:51:54	
1108	Test AP Esculation	APInvoice	Г	•				•		•	Г			20/03/2015 12:10:21	23/06/2015 13:52:13	
1109	AP - Payment Selec	APInvoice				Г	<b>V</b>	•	Г	•		Г		02/04/2015 03:50:06	02/04/2015 03:50:06	
1132	AP Standing Invoid	APInvoice	~				•	~		•	Γ	Г		09/06/2015 15:22:29	09/06/2015 18:00:51	
1169	APInvoice - alert co	APInvoice	~	•			Г	<b>v</b>	Г	•		Г	П	07/09/2017 09:47:58	07/09/2017 09:47:58	
	1 · · ·				-	177	-		-	-	-		-			~

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.

GT			Rule Mainten	ance		
	8 0	<b>5%</b> 68				∽ AFG ⊕
Number 1	051 Q Descri	ption AP Invoice Payment	Selection posting date	Q Record type	Accounts Payable Invoice	
W	hen to run	What to do	Companies	Notes	Custom	History
Operate	es					
Priority	0					Inactive
	Show form driv	ven Record Types only	nclude supplementary Record T	vpes		
On	APInvoice	Q	Description Accounts Payable	nvoice		Q
When	Form Driven	Include Browser Client f	orms Not applicable to Mob	ile 2		
	On New	On Change On De	lete			
	Instant Alert					
	lanore s	uppression flag				
	Scheduled	oppression mag	~	Run Now		
	Use pred	defined collection mvAPC	ontrol:allinvoices	_		
	🔽 Use pred	defined Company myAPC	ontrol:myCompany			
	Programmatic					
	-Relea	ase/Alter Hold				
	-eExp	ense Submit				
	-Calle	d from line assigned Appro	oval			
	-Creat	te Invoice				
	-On e	Xchange EDI Update				
	-Form	Assign				

#### 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.

GT					AP Invoid	e Entry					_ 🗆 ×
0 🗆	1 C %	6Đ	← -	$\leftarrow \rightarrow \rightarrow \models$	×					G 🤜 AFC 🕞	02%60
Batch S2282	Bran	nch 02 (We	ellington)		~	Last invoice n	umber	0001-0001			
Invoice	Select Order	Select R	eceipt	Select Addition	al Charges	Select Ship	ment	Line Item	Custom	Email Tracker	Create <u>R</u> FC
Invoice Detail			Supplier [	Detail							View eDoc
Number	0001-0001	Q	Code	1979	Q	Alph	PAR	RAMOUNT	Q		IPM
Date	19 / 05 / 2016	\$ 1	Name	Paramount Serv	rices				Q		IPM Attachment
Hold code	RFC	~	Currency	NZD Rate	1.00000000		Ob	ant Daill Janua	0001 0001		Create credit note
Entered by	SUPER		Terms	30 Days from In	voice Date	Q	Ubj	ject Drill - Invo		_ <u> </u>	Print cheque
Payment date	18 / 06 / 2016 🗄	4	Dedu	t withholding tax	ing date 19 /	05 / 2010	APInvoic 1004 1003 1048	nd Approvals pital Acq Tax Code se Orders	Serial/Lot <u>n</u> umber <u>B</u> ins		
Narration	Generated from	PO receipt 00	01-0001				1049	ting date	Purchase orders		
							1052	- AP Invoice Paym - AP Esculation R	ent Selection job		Supplier status
Discount 0.00 Type I	Company/Trans A	Net	500.00 Descri	Ta	x 75.00 Subcode/Locat	ion/Activi	1108 1109 1132 1169 1182 1187 INAPL	- Test AP Esculatio - AP - Payment Se - AP Standing Inv - APInvoice - alert - AR Unapplied To - AP Invoice depa ineltem	on Rule 2 lect Direct Credit : oice Payment Sele coll rans rtment	Suppliers ection	
JC E	0	001	0001 (	Angela's Testing	PM						

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.

GT	Trees	_
		🤜 AFG 🕞 🕕 🖉 🕂 🕐
Tree name Alert Projects	Q Re <u>n</u> ame Tree	Load from file
Tree structure	Use this tree in th	ese zones
⊡- <root></root>	Company (06) e-C	Computers - NZ 🗸
—AP invoice approval	Zone	Use
Supplier security	HR Pay Group	
	HR Incident	
	HR Injured	
	HR Disciplinary	
	HR Committee	
	HR Grievance	
	HR Function	
	HR Position	
	HR Applicant	
	HR Recruitment	
	HR Leave Request	
	HR Review	
	HR Recruitment St	age Detail
	Alert Rule	<b>v</b>
		· · ·

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 |

GT		Ale	ert Rule Tree Ass	ignment		_
	88	67	$\mid \leftarrow \ \rightarrow$	$\rightarrow$	≺¶ AFG	$\odot \blacksquare \not ? ? \land \odot$
Tree name	Alert Projects		Q			
Tree struct	ure					
- <aii a<="" td=""><td>lert Rule&gt;</td><td></td><td>Number</td><td>Description</td><td></td><td></td></aii>	lert Rule>		Number	Description		
- <all td="" u<=""><td>Inallocated Alert Rule&gt;</td><td></td><td>1005</td><td>AP - Prevent deletion of AP Inte</td><td>erface</td><td></td></all>	Inallocated Alert Rule>		1005	AP - Prevent deletion of AP Inte	erface	
- <root< td=""><td>t&gt;</td><td>_</td><td>1001</td><td>AP - Supplier - Bank details ma</td><td>ndatory</td><td></td></root<>	t>	_	1001	AP - Supplier - Bank details ma	ndatory	
AF	P invoice approval		1004	AP - Invoice - FA line requires C	apital A	
-50	applier security		1003	AP - Invoice - Matching to Purc	hase Or	
				Select <u>A</u> ll		4 Alert Rule
Tree/zone : This is a	settings mandatory tree					
Ready				Tree 3 of 4		

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 |

GT				Rule Ma	intenance				_ □ >
308		<b>%</b> 6	$\mathbb{A}  \vdash \leftarrow \cdot$	$\rightarrow \rightarrow$ ×	<b>)</b>			∽¶ AFG ⊕	
Number 1003	Q Des	cription AP - Invo	ice - Matching to Pu	urchase Orders	Q Record ty	pe Accounts	Payable Invoice		
When	to run	What to	o do	Companies	Notes		Custom	History	INACTIVE
Date	Time	User	Detail						Import
15/07/2013	10:27:39	SUPER	this is an au	GT		Alert Rule	History		_ 🗆 🗙
15/07/2013	10:58:00	SUPER			<u> </u>	(44)			- AER At @
15/07/2013	10:58:09	SUPER	Made active	لصا	0 60				A AND ALLO
16/07/2018	10:15:05	SUPER		Number	1003	Description	AP - Invoice -	Matching to Purchase	Orders
				Date	15 / 07 / 2013 🚞	10:27:39			
				Entered by	SUPER				
				Detail	this is an automati	c non-un wh	en ever anvthion	is changed and a rule	needs to be
				Detail	saved				
Baady					Document	Jula 4 of 242			

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.

б	Script Editor for class SOSalesOrder	_ □ >	ĸ
Jade	script to evaluate condition	Enter password to edit	
1 2 3 4 5 6 6 7 7 8 9 10 111 133 14 14 15 16 17 18 16 17 18 12 20 21 223 24 24 Chee	<pre>crmRC1047(_src : Object; _context : Integer; _event : String) : String updating;     vars     packingSlipCombiner: SOPrintPackingSlipCombiner;     soINLineItem: SOSOINLineItem;     lineItem: LineItem;     error: String;     batch: ARInvoiceBatch;     tempFormDefn, theRept: AHFormDefn;     fromPS, toPS, pRunNumber, salesOrderNumber, parkingSlipDate: RPRTPrintFieldDefn:     printRunNo, profileNo: Integer;     preference: SOPreference;     now: Date;     defaultLine: String;     user: User;     qtyAvail,qtyOnB0: Decimal[12,2];     linesToDispose: ObjectArray;     cancelledReason: SOStatusDefinition;     boStatus: SOStatusDefinition;     object: Object;     task: AHReportTask;     taskQueueEntry: JSTaskQueueEntry;     printer: PQPrinter;  ription of what is being evaluated ck Branch and Location and generate packing slip</pre>	Close	
	Com <u>p</u> ile <u>I</u> mport <u>F</u> ind <u>R</u> eview	OK <u>C</u> ancel	

- 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.

)E ur	GT	Save	e and exit	St					
nt .π		A compile err	or was detected in line 37	or					
sN		Error 6004 - Invalid token - "\"							
o: d		Do you still w	ant to save this script?	ľ					
		Yes	No						

Orden customer orden vamber, denvery bate, discoult

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.



# **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

G App	os For Greentree	Module Co	ontrol						
	8 🗳	<b>*</b> =	n 🔊			- Ap	ps 🚦		ମ୍ 🖌 🚱
Enter New Registration Code Install App Delete Inactive/Expired Apps Uninstall Apps									For Greentree
Code	Name				Descr	ption		Active	Expiry Date 📃 🔺
000000	Apps For Greentree F	orm			App U	sage information on Forms		<b>v</b>	31 December 2
010001	AR Sales Orders Tab	)			Tab in	Customer maintenance to display Sal	les Ord	<b>v</b>	03 December 2
010002	IN Reorder Workben	ich			Invent	ory Reorder Workbench		<b>I</b>	31 December 2
010003	IN Min/Max Workber	nch			Invent	ory Min/Max Workbench		<b>V</b>	31 December 2
010004	AR Sales History Tab	)			Tab in	Customer maintenance to display Sal	les Hisl	<b>I</b>	31 December 2
010005	AB Pricipa Tab				Tah in	Customer maintenance to display Priv	nina		31 December 2

- 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.

