



# HarePoint Custom Alerts for SharePoint

For SharePoint Server 2010/2013 and SharePoint Foundation 2010/2013.



Product version 1.0

March 7, 2013

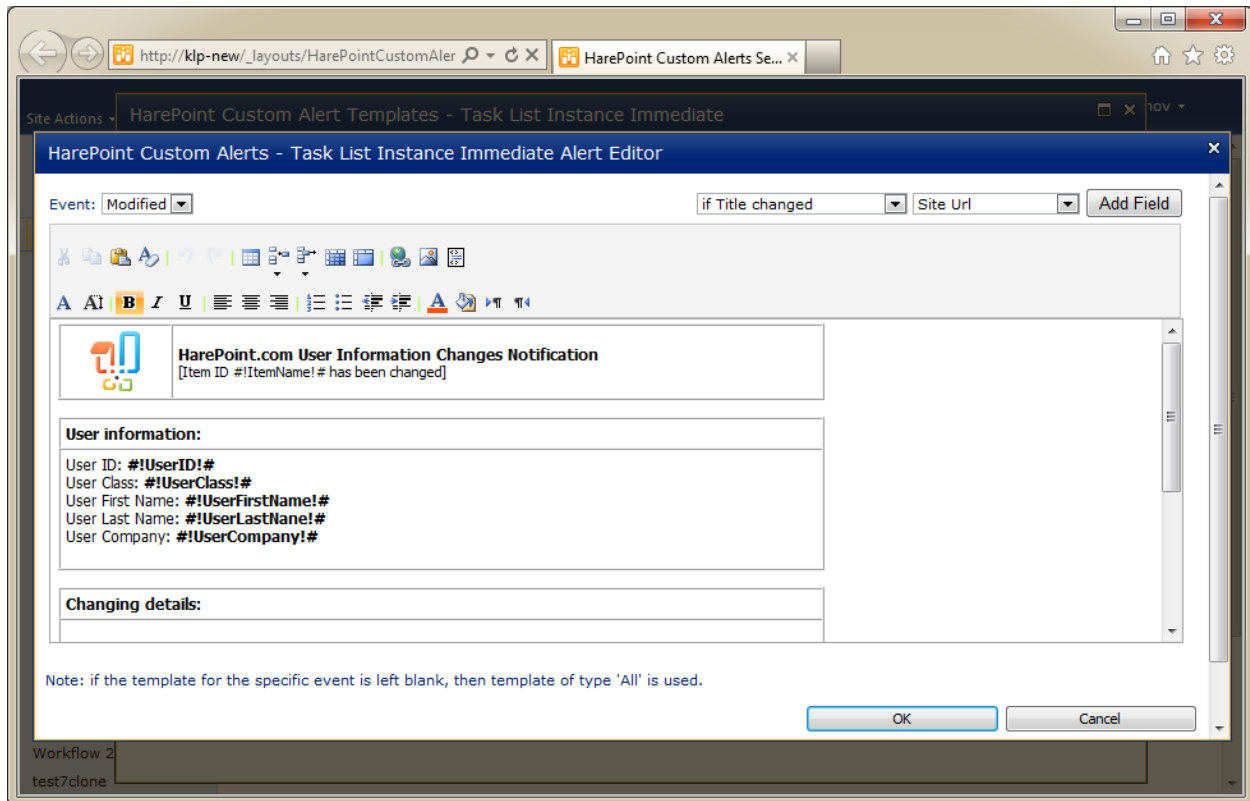
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## I. Introduction

**HarePoint Custom Alerts for SharePoint** allows you to create a custom template for each specified SharePoint list, document library or content type. The appearance of email notifications can be fully customized: you can select fields to display in the notification, customize links, change the field order and layout, brand email with company graphics, and most importantly - track list item changes by including old and new values of the modified item.



The Product allows:

- Any site-owner can create any required alerts for his site; farm-admin permissions are not required.
- Changes tracking feature: you can display old and new values of items in the email notification.
- Separate template for each type of event (adding, changing, and deletion)
- An individual template for any list or document library or content type can be created.
- The notification template can be easily designed in an advanced HTML-editor and any required data can be displayed.
- The product is fully compatible with Microsoft SharePoint 2010 and 2013.

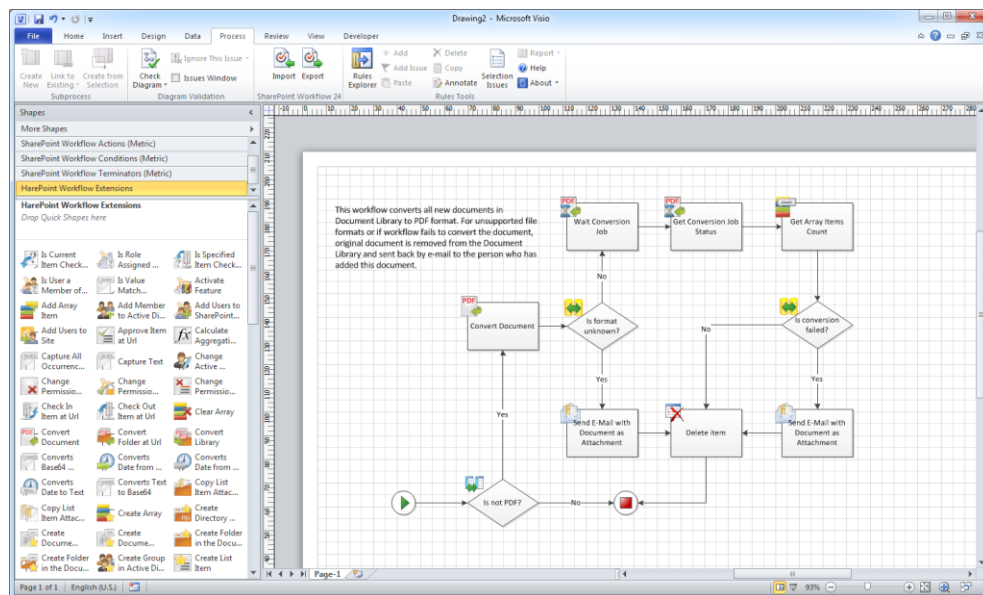
We also recommend you to pay attention to the following products of our company:

- **HarePoint Workflow Scheduler for SharePoint 2010** is a free software product that allows automatic execution of SharePoint workflows by schedule. With its help, you can automate recurring business processes, debug your workflows with various sets of parameters, test server's performance by starting workflows with specified frequency.

The product supports declarative workflows (created in Microsoft SharePoint Designer) and Visual Studio workflows. It supports both site and list workflows and allows launching workflow for every document or list item, for manually selected item or for items selected by CAML query. HarePoint Workflow Scheduler is fully compatible with InfoPath, and has the option to pass pre-defined parameters.

Task Name	Enabled	Workflow Name	List Name	Triggers
Generate Invoices	Yes	GenerateInvoice	Orders	At 45 minute every hour
Update Profiles	Yes	UpdateProfile		At 3:30 AM every day
Run now	No	ConvertDocs	Docs	At 30 minute every 3 hours
Disable	Yes	Report	Orders	At Mon in 12:10 AM every week
View Item	Yes	Report	Orders	At 1st day 5:46 PM every month
Edit Item	No	ConvertImages	Photos	At 10/19/2011 12:30 AM
Alert Me	Yes	Reminder		At 8:30 AM every day
Manage Permissions	Yes	Report	Orders	At 10/10/2011 5:50 PM
Delete Item				
Add new item				

- **HarePoint Workflow Extensions for SharePoint 2010** provides over 180 new 'ready-to-use' activities for SharePoint workflow development. The product is fully supported by all Microsoft workflow development tools and there is no need to migrate and adapt current workflows to a new development environment, or to master and deploy new development tools. You can benefit from the power of the product in SharePoint Designer 2010, Microsoft Visual Studio \2010, and in Microsoft Visio 2010.



You will find the information on these products, as well as trial versions at [www.harepoint.com](http://www.harepoint.com).

## II. Deployment

### 1. System requirements

HarePoint Custom Alerts for SharePoint is designed to operate in:

- Microsoft SharePoint Server 2013,
- SharePoint Foundation 2013,
- Microsoft SharePoint Server 2010,
- SharePoint Foundation 2010

(hereinafter referred to as SharePoint) environments.

The Product has no special requirements to the operating system and its components, RAM memory space and CPU type. The Product may operate at any configuration where SharePoint is deployed; it requires 10 Mb of disk space on each SharePoint server.

### 2. Licensing and trial limitations

HarePoint Custom Alerts for SharePoint is licensed for a number of SharePoint Web Front-End Servers or servers where “Microsoft SharePoint Web Application” service is running. The number of licenses should correspond to a number of servers. The list of services installed on the server can be viewed by opening System Settings tab and clicking the link “Manage servers in this farm” on Central Administration site.

You may use the Product on the basis of one of two licenses:

1. **Trial License.** Provided automatically for a 30-day period to use the Product in organization’s environment without any limitation of Product functionality.
2. **Commercial License.** This license is purchased for a number of SharePoint Servers and allows using the Product in the organization’s environment without any limitation by usage time and functionality.

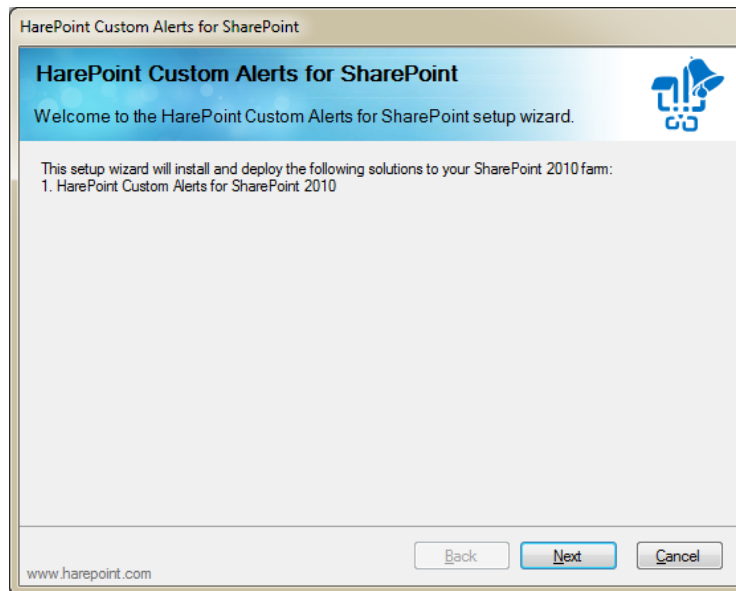
Note that after purchasing Commercial License and entering registration keys into the Product settings, the Product becomes fully functional.

See product page at <http://www.harepoint.com/> for more details about Product licensing and pricing.

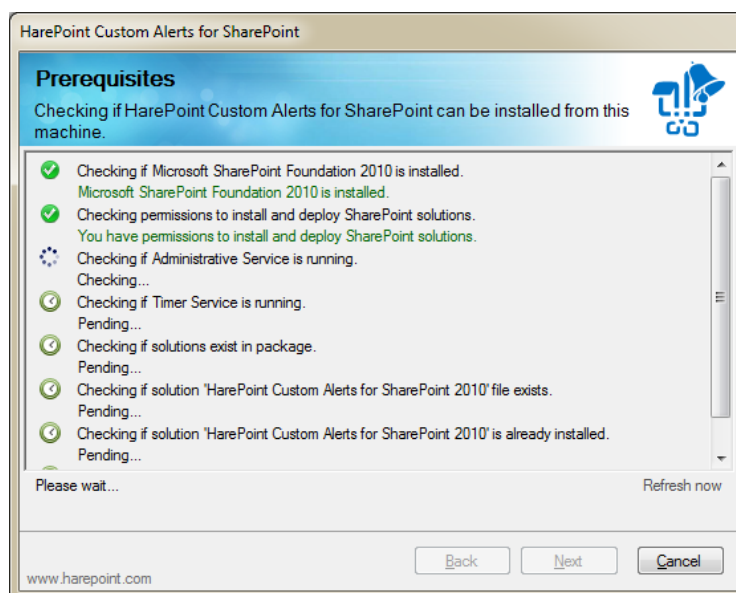
### 3. Installing HarePoint Custom Alerts for SharePoint

To install the product you'll need Farm Administrator rights.

Please access any WFE server of the SharePoint farm, unpack the product archive into a folder on the local disk. Run SETUP.EXE in the selected folder. Installation Wizard will start:

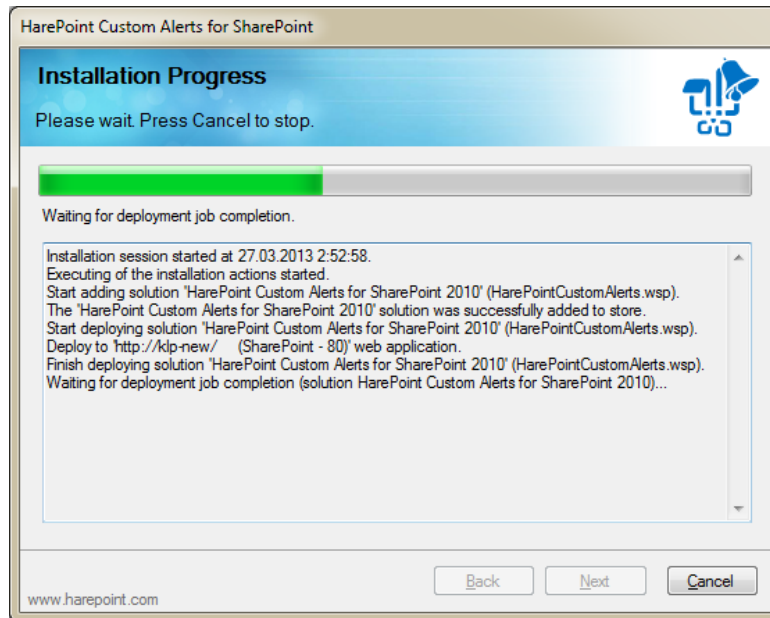


Press Next button on the wizard's welcome screen and the wizard will check if the product can be installed:



Should any problems be detected, please rectify them and restart the installation wizard.

At the next step of the Wizard, you'll choose site collections where the Product should be deployed. Select required site collections and follow the instructions of the Wizard to complete installation:

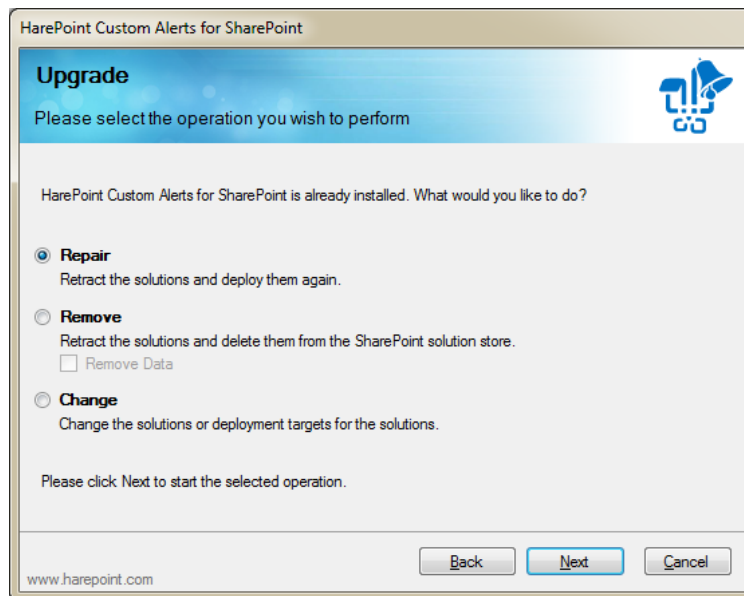


The Product does not require any post-install configuration and ready to work now. But we recommend reading of article “Task triggering mechanism” in Section III before you start.

## 4. How to repair, upgrade or remove the Product

To repair, upgrade or remove the product you'll need Farm Administrator rights.

Please enter any WFE server of the SharePoint farm, unpack the product archive into a folder on the local disk. Run SETUP.EXE in the selected folder. Installation Wizard will be launched. Following instructions of the Wizard, pass system check step similar to those ones during the product installation (see Chapter 4). Upon completing these steps the Wizard will ask you to repair, upgrade, or remove Product components.



Select the required type of operation and follow further instructions of the Wizard.

If you select the "Change" option, then you can manage the set of web sites where HarePoint Custom Alerts feature is activated.

When you removing the Product using Wizard, the custom alert templates you have created are kept unless you check "Remove Data" option.

## III. Product Overview

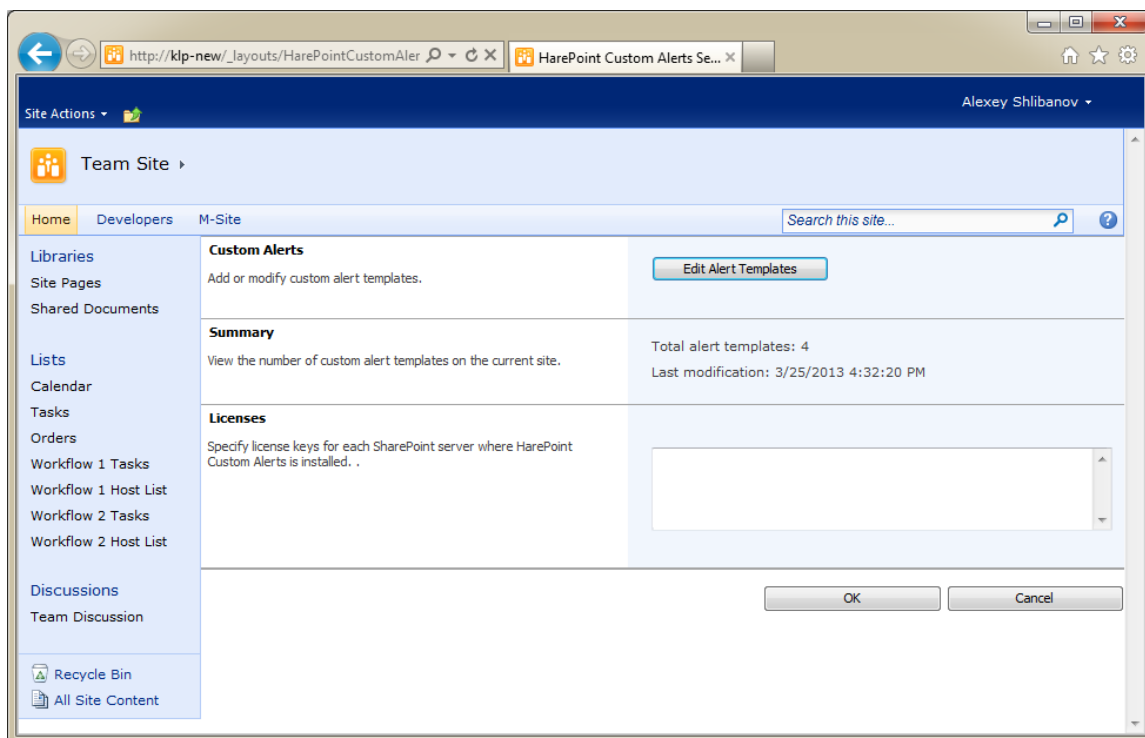
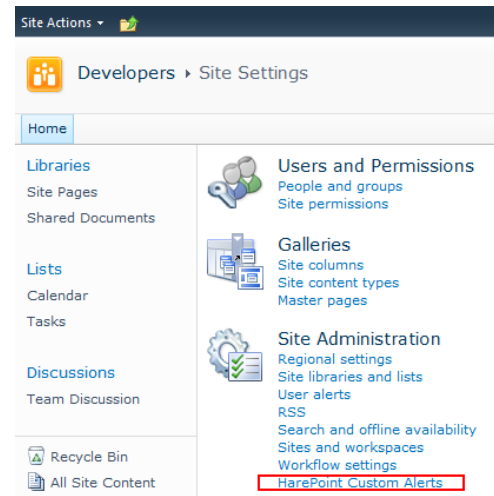
### 1. Getting Started

With the HarePoint Custom Alerts for SharePoint, you can override the default templates used by SharePoint server to send e-mail alerts. Then you can use standard SharePoint “Alert Me” feature to send out customized e-mail notifications.

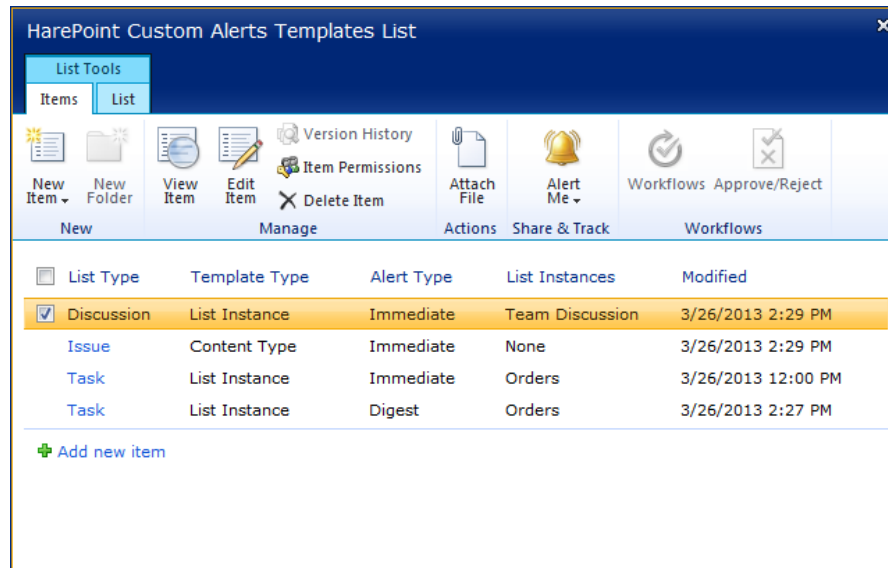
To operate the Product you need Site Owner privilege. Please note that all product Settings have Site scope.

To start working with the Product go to Site Administration section and select HarePoint Custom Alerts to open the Product’s main page.

The main settings page of the product is pretty simple. It contains three sections: *Custom Alerts* is a main section where you can create and manage custom alert templates; *Summary* section gives you a brief overview of custom alert templates created on the current site; *Licenses* section is a place where you can submit you license keys and view current licensing status.



When you click on the “Edit Alert Templates” button, the HarePoint Custom Alerts Templates List will pop up. This list contains custom templates created on the current web site.



The custom alert template can be associated with either specified List/Document Library or with specified Content Type. There are two alert types: *Immediate* (sends out immediately after an event has been occurred) and *Digest* (send out periodically). Alerts of different types have different sets of options.

## 2. Adding Custom Alert Template

When you add a new custom alert template, you must specify *Template Type* (whether template is associated with List or Content Type), select particular *List* or *Content Type* (depending on previous selection), specify *Alert Type* (Immediate or Digest) and define a *Template*.

The screenshot shows a window titled "HarePoint Custom Alert Templates - New Item". It features a toolbar with icons for Save, Cancel, Paste, Copy, Delete Item, Edit Series, Claim Release, Attach File, and Distribution Approval. Below the toolbar, there are several input fields: "Template Type \*" with a dropdown menu set to "List Instance", "List Instances" with a dropdown menu set to "Tasks", "Alert Type \*" with a dropdown menu set to "Immediate", and "Template \*" with an "Edit" button. A "Preview" section below these fields shows a dashed rectangular box with the text "Template has not been created." at the top. At the bottom right of the window are "Save" and "Cancel" buttons.

When you click on the “Edit” button, the Alert Editor will pop up. In this editor you must specify the HTML template for the alert. The HTML code can contain macros that corresponds to the fields of selected SharePoint List or Content Type.

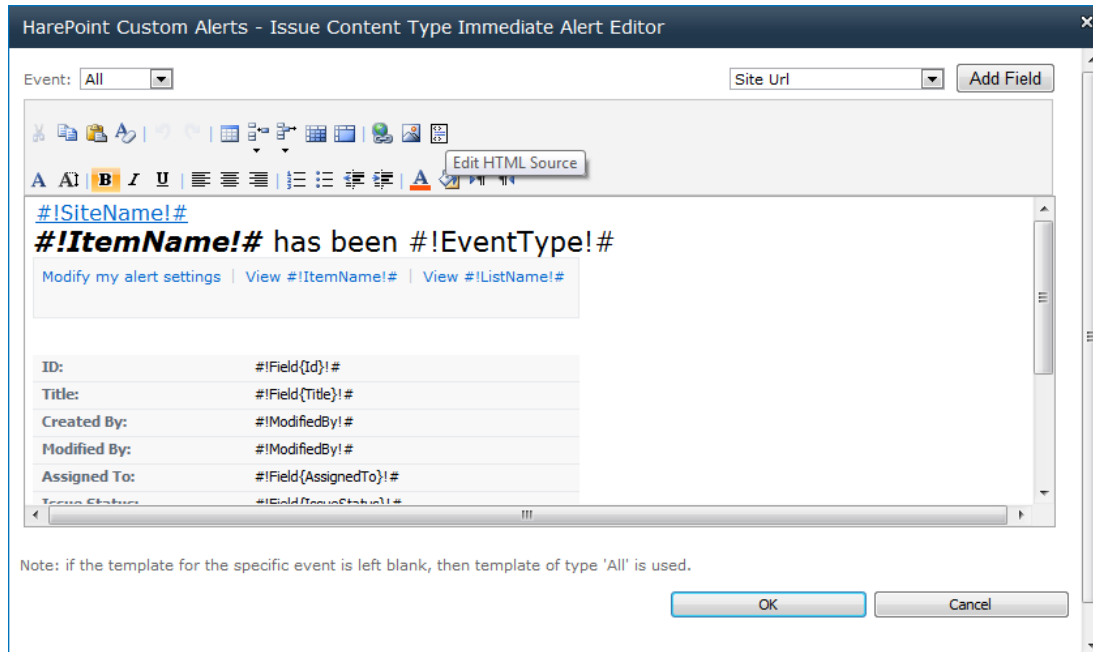
For the “Digest” alert type there is a special pair of macros (`#!Items!#` and `#!/Items!#`) that defines the area to be repeated for each added/modified item.

The program will generate a HTML template when you first time try to edit it. This generated HTML template is a good starting point to create your own custom alert.

### 3. Designing Custom Alert Template

You can edit the alert template in either visual html editor or by editing the html source code.

In the upper right corner is a dropdown list of available fields. Pressing the “Add Field” button adds the corresponding macro to the template.



For the alerts of “Immediate” type you can specify different template for each event: *Added*, *Modified* or *Deleted*. The template of type “All” is used when template for specific event is blank.

“Modified” event differs from other events. First, it allows you to insert macros with both old and new values of the item. For example: `#!OldField{EMail}!#` and `#!NewField{EMail}!#`.

Second, it allows the use of special condition of the form:

```
!#if#!Field{EMail}!#changed#!  
...  
!#endif#!
```

Which allows to display in the alert only those fields that have changed.

## Appendix A. Troubleshooting

### A.1 Product is not available at Site Administration

Open “Manage site features” at “Site Actions” section of site settings and check that following feature is activated:

- HarePoint Custom Alerts

### A.2 Custom alert template is created, but SharePoint still sends out standard alert notification

Open “Manage farm features” at “System Settings” section of SharePoint Central Administration and check that following feature is activated:

- HarePoint Custom Alerts Event Tracker