

SharePoint Alerts

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New York City SharePoint User Group

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Presentation Overview

- Introduction
- SharePoint Alerts
 - Comparing WSS2/SPS2003 to WSS3/MOSS2007
 - How Alerts Work
 - Customizing Alerts
 - Limitations
- Questions

Bamboo Solutions – In the Beginning...

- Started in 1996
- Early focus on collaborative document management solutions
- Flagship product, WD3, still in use
- WD3 Features
 - Flexible meta-data creation
 - Document storage and full versioning
 - Customizable workflow tool
 - Security down to data item level

Bamboo Meets SharePoint

- New WD3 competitor
- Adopted for use as a platform for building custom applications
- Experiences launch Web Part and SharePoint based products business
- Online Storefront goes live on 11/15/2005
- Currently the largest provider of individual Web Parts in the world
 - 40+ Products for SharePoint, 3,000+ unique customers
 - All products downloadable for free 15-day trials
 - Licensed and priced per physical server

Comparing WSS2/SPS2003 to WSS3/MOSS2007

- WSS 2.0
 - Lists and List Items, Document Libraries and Documents
 - Timer Based
- SPS 2003
 - Added alerts on people, areas, searches, and news
 - Search Based
- WSS 3.0 & MOSS 2007
 - Alerts specified on all levels
 - Timer Based

Enhancements in WSS 3.0 & MOSS 2007

- Ability to alert on specific criteria changes
- Ability to subscribe others to an alert
- Message formatting improvements
- Better alert management

Immediate Alert: Message Format

Create Rule...

Tasks - Review Design Document

Wes Test Site [administrator@bamboosolutions.com]

To: Wes Bryan

[Wes Test Site](#)

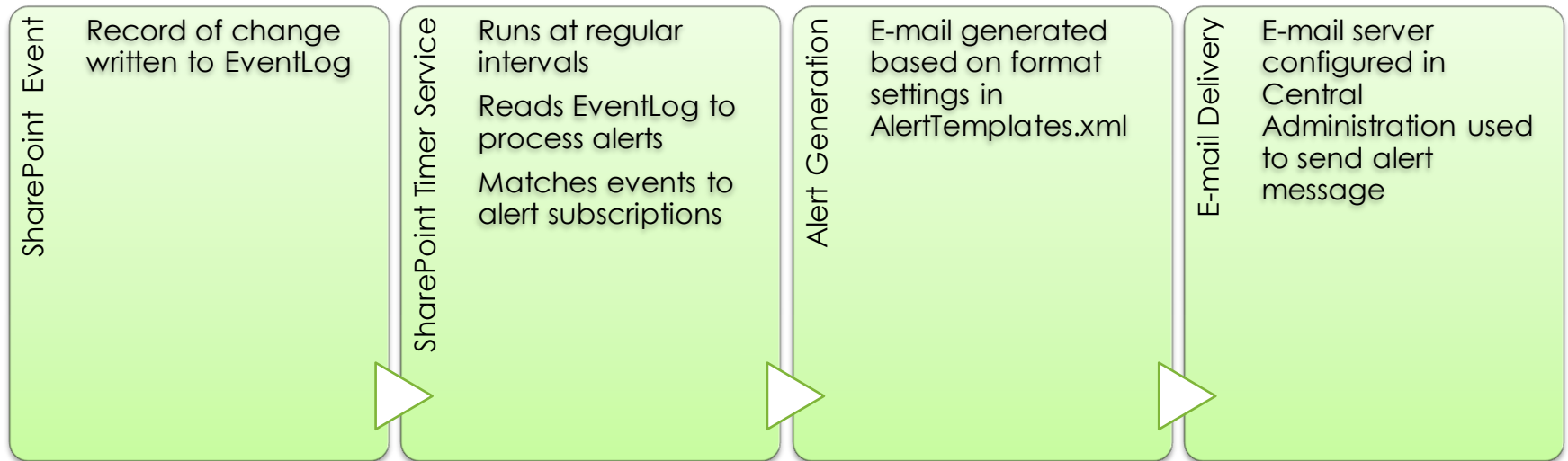
Review Design Document has been changed

[Modify my alert settings](#) | [View Review Design Document](#) | [View Tasks](#) | [Mobile View](#)

Title:	Review Design Document	
Priority:	(2) Normal (1) High	Edited
Status:	Not Started	
% Complete:	10%	Edited
Assigned To:	Wes Bryan	
Description:	Review and edit the design document for product x.	
Start Date:	5/1/2007	
Due Date:	5/31/2007 9/7/2007	Edited

Last Modified 9/6/2007 10:14 AM by Wes Bryan

How SharePoint Alerts Work



Customizing Alerts

- Modifying Message Templates
 - Layout and appearance
 - Fields included in the notifications
- Adding Custom Alert Triggers
 - Modify existing events
 - Create new event definitions

Customizing Alerts

- AlertTemplates.xml
 - Located in “\Program Files\Common Files\Microsoft Shared\Web Server Extension\12\Template\XML”
 - Specifies alert behavior for object types within a Web Application.
 - Message format
 - Immediate Alerts
 - Digest Alerts
 - Options for Alert Triggers

Customizing Alerts

- AlertTemplates.xml sample

```
<?xml version="1.0" encoding="utf-8" ?>
- <AlertTemplates>
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.GenericList">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.DocumentLibrary">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.WebPageLibrary">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Survey">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Links">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Announcements">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Contacts">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Events">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.Tasks">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.DiscussionBoard">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.PictureLibrary">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.XMLForm">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.DataConnectionLibrary">
+ <AlertTemplate Type="List" Name="SPAlertTemplateType.AssignedToNotification">
</AlertTemplates>
```

Immediate Alert: Message Layout

Create Rule...

Tasks - Review Design Document <Subject>

Wes Test Site [administrator@bamboosolutions.com]

To: Wes Bryan

[Wes Test Site](#)

Review Design Document has been changed <Header>

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Customizing Alerts

- Resource Strings: Core.resx
 - Located in “\Program Files\Common Files\Microsoft Shared\Web Server Extension\12\Resources”
 - Language specific versions present (core.en-us.resx)
 - Provides string resources for the various constants used in SharePoint
 - Customize existing alert format and trigger text
 - Create new entries as needed

Customizing Alerts

- Core.resx sample

core.resx																																	
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metadata	<table border="1"> <thead> <tr> <th colspan="2">Data for data</th> </tr> <tr> <th>name</th> <th>value</th> </tr> </thead> <tbody> <tr> <td>Alerts_1_filter_shortcode</td> <td>Created by me</td> </tr> <tr> <td>Alerts_2_filter_begin</td> <td>Someone else changes</td> </tr> <tr> <td>Alerts_2_filter_end</td> <td>last modified by me</td> </tr> <tr> <td>Alerts_2_filter_shortcode</td> <td>Modified by me</td> </tr> <tr> <td>Alerts_3_filter</td> <td>An announcement with an expiration date is added or changed</td> </tr> <tr> <td>Alerts_3_filter_shortcode</td> <td>Expiration date</td> </tr> <tr> <td>Alerts_4_filter</td> <td>The time or location of an event changes</td> </tr> <tr> <td>Alerts_4_filter_shortcode</td> <td>Time or Location</td> </tr> <tr> <td>Alerts_5_filter</td> <td>A task is assigned to me</td> </tr> <tr> <td>Alerts_5_filter_shortcode</td> <td>New Assignment</td> </tr> <tr> <td>Alerts_6_filter</td> <td>A task becomes complete</td> </tr> <tr> <td>Alerts_6_filter_shortcode</td> <td>Task Complete</td> </tr> <tr> <td>Alerts_7_filter</td> <td>A high priority task changes</td> </tr> <tr> <td>Alerts_7_filter_shortcode</td> <td>High priority</td> </tr> </tbody> </table>	Data for data		name	value	Alerts_1_filter_shortcode	Created by me	Alerts_2_filter_begin	Someone else changes	Alerts_2_filter_end	last modified by me	Alerts_2_filter_shortcode	Modified by me	Alerts_3_filter	An announcement with an expiration date is added or changed	Alerts_3_filter_shortcode	Expiration date	Alerts_4_filter	The time or location of an event changes	Alerts_4_filter_shortcode	Time or Location	Alerts_5_filter	A task is assigned to me	Alerts_5_filter_shortcode	New Assignment	Alerts_6_filter	A task becomes complete	Alerts_6_filter_shortcode	Task Complete	Alerts_7_filter	A high priority task changes	Alerts_7_filter_shortcode	High priority
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assembly																																	
data																																	
resheader																																	

Committing Changes

- AlertTemplates.xml file changes
 - Run stsadm.exe -o updatealerttemplates -url <http://sharepointurl> -filename [path to new/updated AlertTemplates.xml] -LCID [LocaleCultureID (1033)]
 - Run for each Web Application
 - Requires an IIS reset
 - *Restart SharePoint Services Timer Service?, maybe*
- Core resource file changes (core.resx or core.en-us.resx)
 - Requires an IIS reset

Current Alert Limitations

- Unable to set proactive date notifications
- Alert messages only configurable at the object level
- Administrators cannot check the accuracy of existing alerts without logging in as that user
- Recipient options limited

Thanks for listening...

Questions?

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