Virto SharePoint Alerts Web Part
v.5.1.15

User and Installation Guide

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System/Developer Requirements

Server
Software: Microsoft Office SharePoint Server 2013, Microsoft .NET Framework 4.5
Hardware and software requirements for SharePoint 2013: https://technet.microsoft.com/en-us/library/mt493254(v=office.16).aspx

Note: This product is not compatible with SPS 2010 and WSS v2.

Client
Browser: Microsoft Internet Explorer (9+), Mozilla Firefox, Opera, Google Chrome.

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Virto SharePoint Alerts Web Part Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto SharePoint Alerts web part.

Installing Virto SharePoint Alerts

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

To access Virto SharePoint Alerts Setup program download **Virto.SharePoint.20XX.AlertsAndReminders.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.

Virto SharePoint Alerts wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click “Next”.

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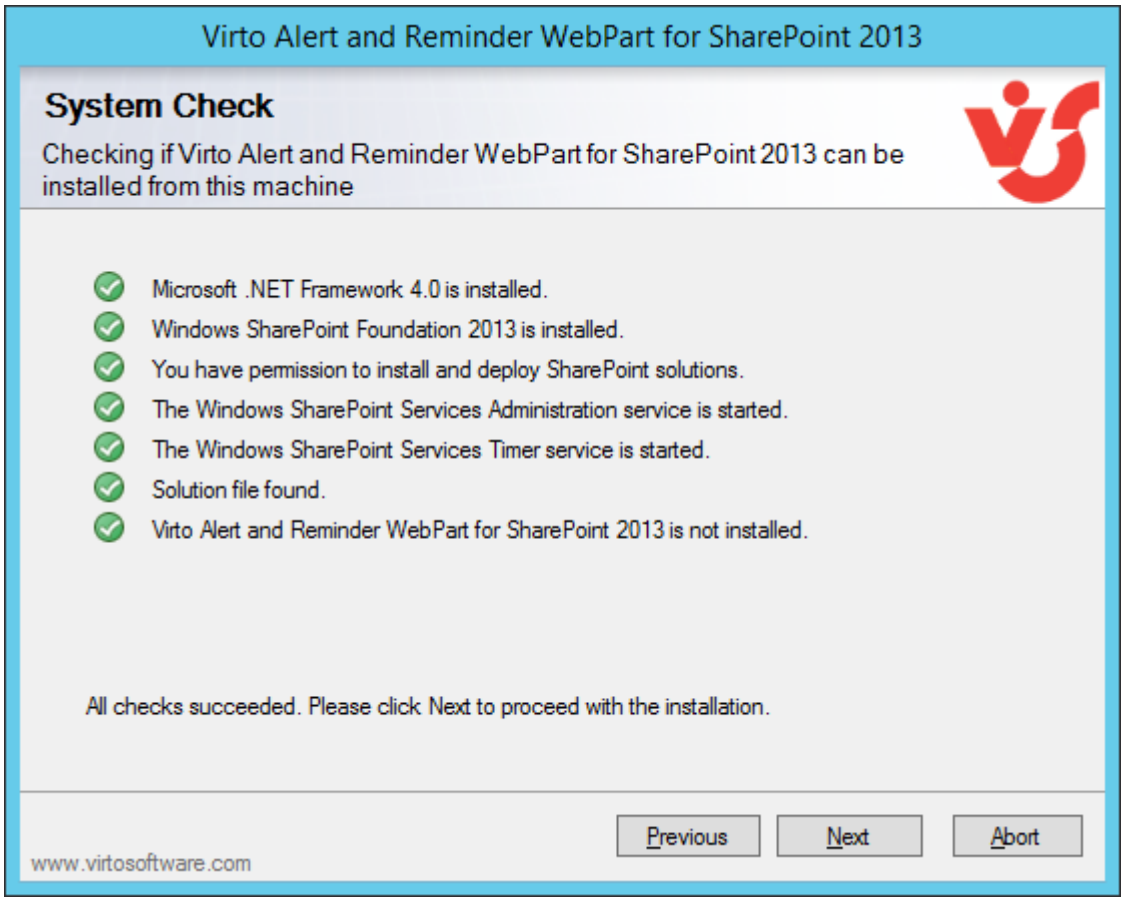

Check “I accept the terms in the License Agreement” and click “Next”.

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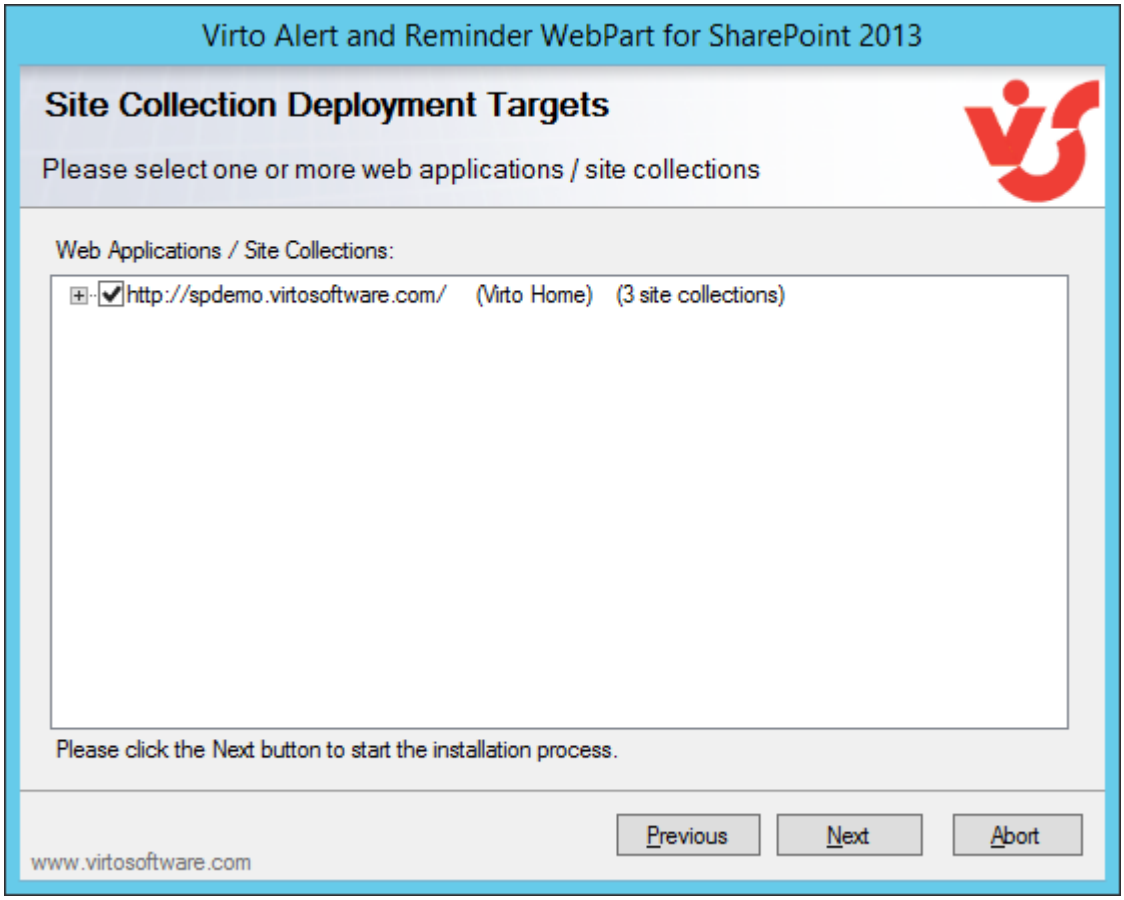
Select the web application(s) where you want to install the product.
Warning: *You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature*.



Then click “Next”.

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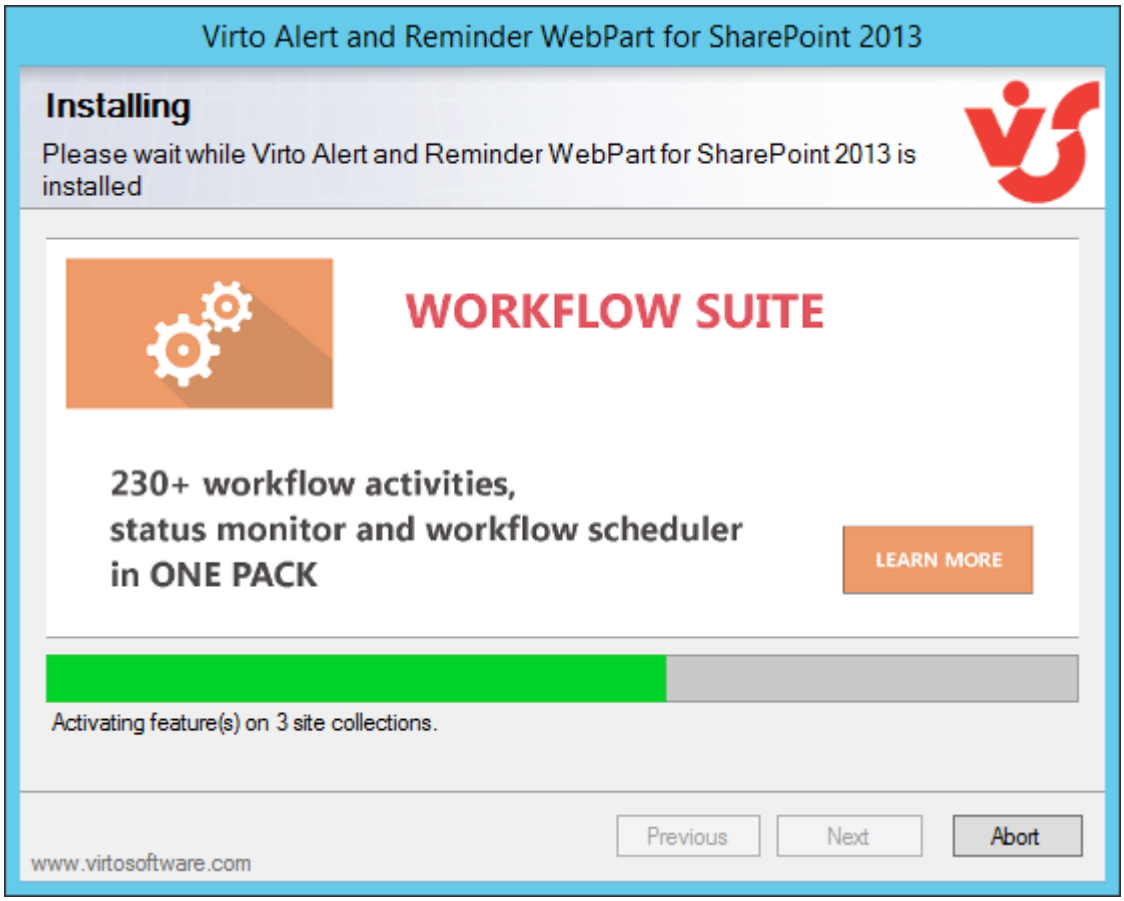
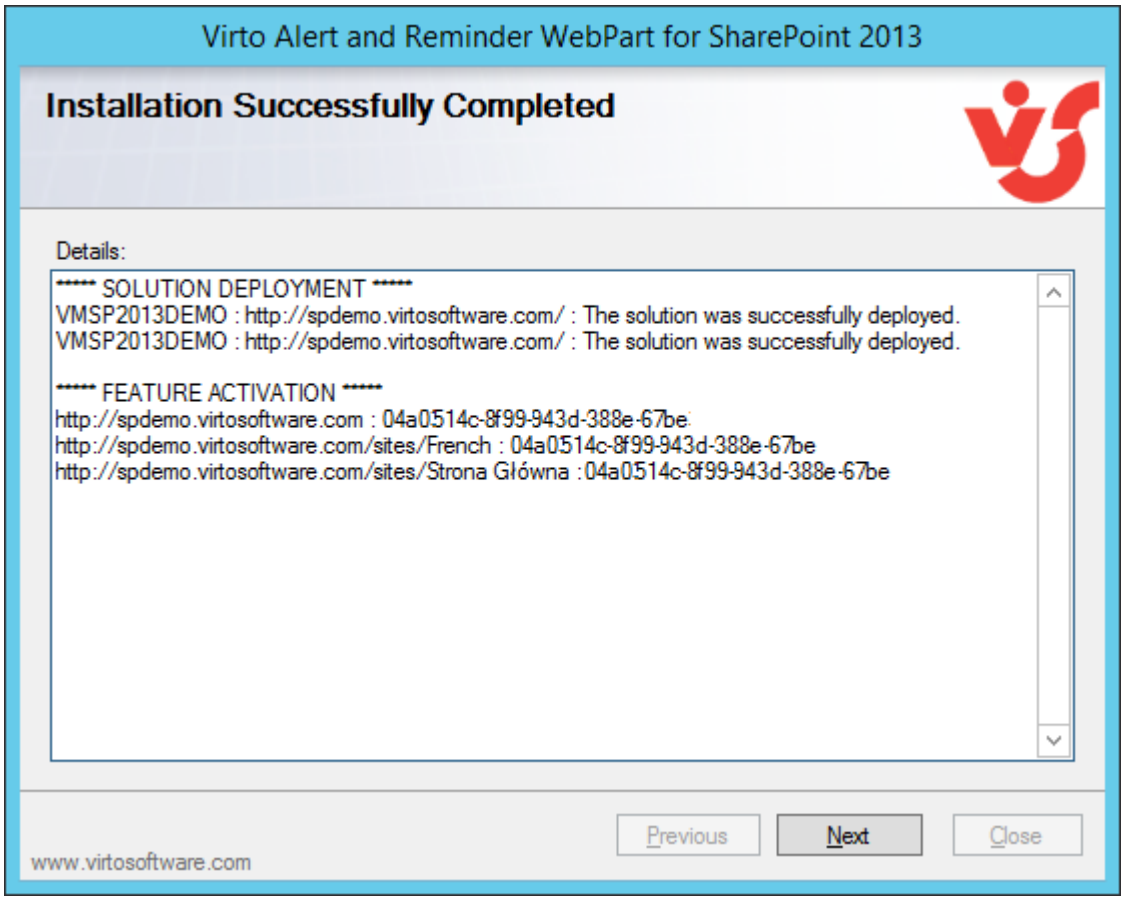


Click “Close” to complete the installation.



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***Note**: installation procedure is similar for SharePoint 2013 and 2016 versions.*

License Activation

To see full instruction for successful activation of your component, please read our blog.

Upgrading Virto SharePoint Alerts

If you already use Virto SharePoint Alerts web part and need to upgrade it to the latest version, download the.zip file from http://www.virtosoftware.com. Unzip the file and run setup.exe.

On the step 3 check the box "Upgrade" and click "Next".

***Note**: if you had activated the license while installing the previous Virto SharePoint Alerts version, you do not need to activate it again.*

Uninstalling Virto SharePoint Alerts

To uninstall the component:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.20XX.AlertsAndReminders.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click "Next".

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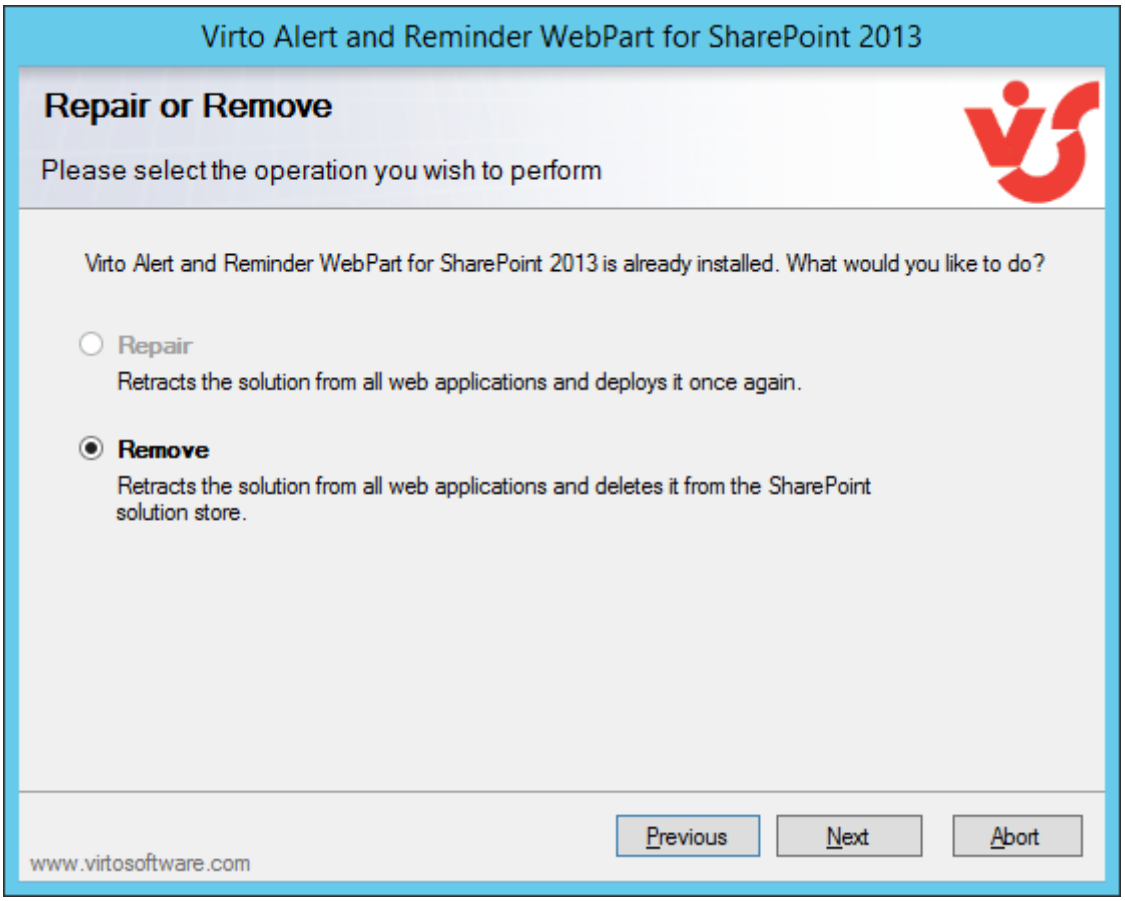
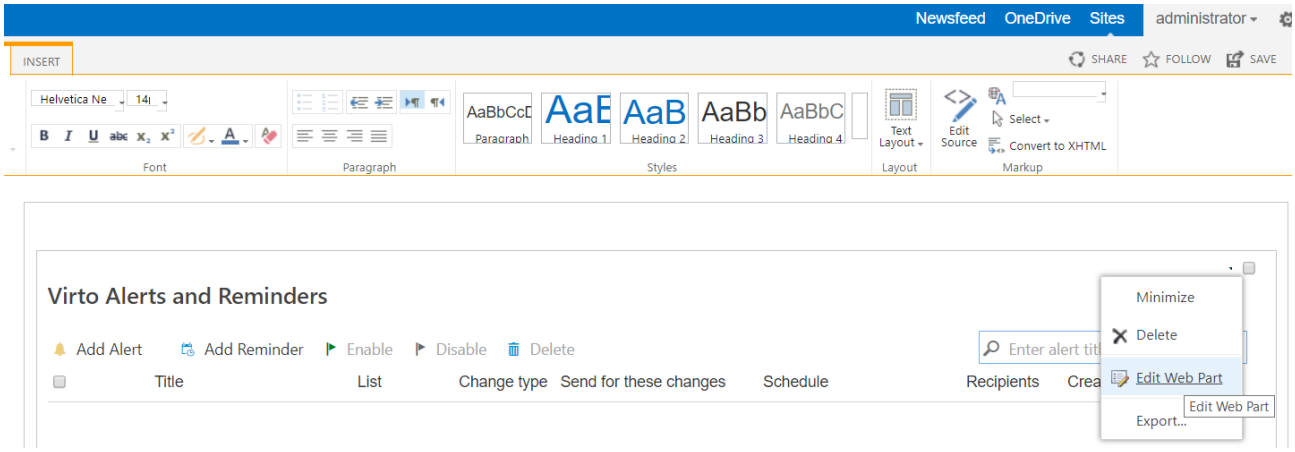


Administration and Usage

SharePoint Alerts Web Part Administration

Once you have added Virto SharePoint Alerts to the site page, you have to adjust the web part.



There you have to create a new communication type (smtp or sms), select user groups allowed to create alerts, and you can also define an External host path.

External host path allows users to replace the host part of the site link, item link, and item URL, that can be inserted in e-mail alert messages. This feature is usually used to provide SharePoint users logged in

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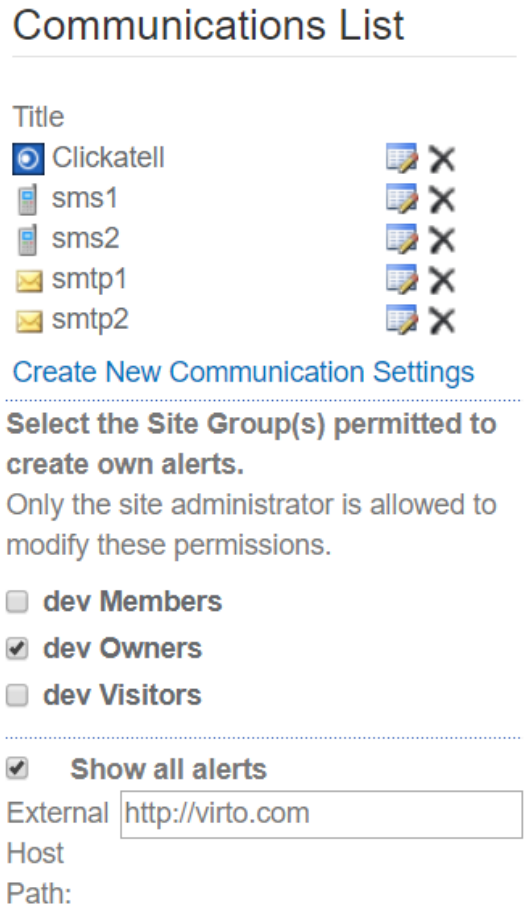
from external local domain with a public host path to the SharePoint web server. For example, if you enter http://wssportal.yourcompany.com/, outside users will receive alerts with links on item but site links in their e-mail alerts will be changed from http://YourInternalServerName/ to http://wssportal.yourcompany.com/... and will be available for those outside of the network.



Click ”Create new communication settings” to add a new communication type. In case the global server is not adjusted, the e-mail messages can’t be sent. Please ensure the smtp server is properly adjusted and doesn't have security restrictions, which are interrupting alert email delivery.

SMTP

You can adjust SMTP server which will be used to send alerts and notifications. In order to do this, uncheck the box “Use standard SharePoint outgoing settings”.

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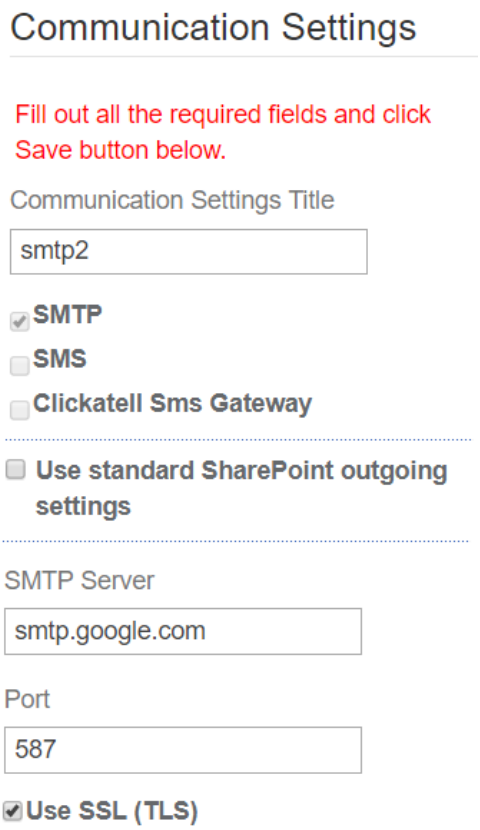

Then fill in the following fields:

SMTP server - enter SMTP server (for example, *smtp.google.com*);

Port – enter SMTP server port. 25 is default (for Google, for example, *587*);

Use SSL checkbox – check it if you need to use SSL (required for Google);

From Email – enter address on behalf of which SMTP server will send email messages. Most servers check this address, and it is required to create an account on the mail server and send messages on behalf of it.

Use specific user credentials checkbox. If it is unchecked, email sending is organized without authentication. In case SMTP server requires authentication (for example, Google) check this box and fill out fields **User Name** and **Password**.

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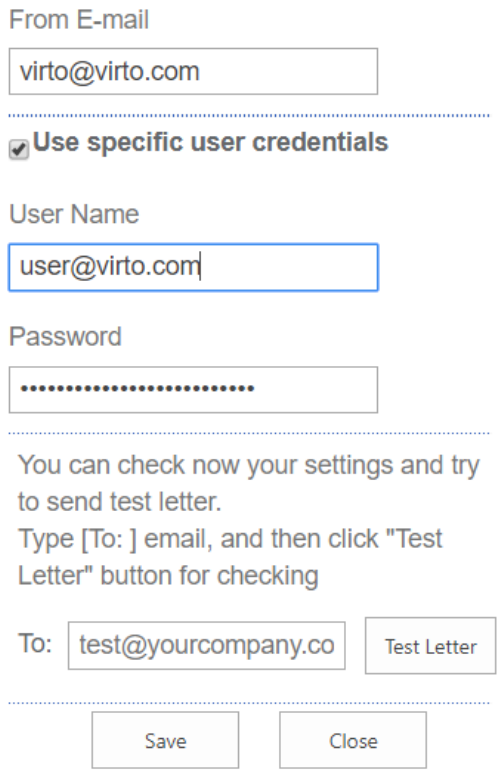

Once you have entered all the required fields, type your email address in the “To” field and use “Test Letter” to check if the settings are correct and SMTP server works. The message about correct or incorrect settings will appear.

SMS Adjustment

If you select SMS, you have to fill out the following fields:

SMS Server Host - enter SMS server host (for example, smsserver.com);
SMS Server Port – enter SMS server port (2000 on the sample picture);
From Contact Number – enter the phone number which will be displayed as a number from which the SMS was sent.
Address Range is defined by SMS provider.
System ID and System Password – information of user registered by provider.

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Sms Server Host

smsserver.com

Sms Server Port

25

From Contact Number

2000

Address Range

777

System ID

15

System Password

••••••••••••••

Save Close

Click “OK” to save the settings of SMS communication.

Note: SharePoint Server needs Internet connection for sending SMS Alerts. Local connection is not enough for successful operation.

Clickatell SMS Gateway

Tick the “Clickatell SMS Gateway” box in the settings. Enter the API ID, name on behalf of which the alerts will be sent, and enter user credentials (user on behalf of which the alert will be sent).

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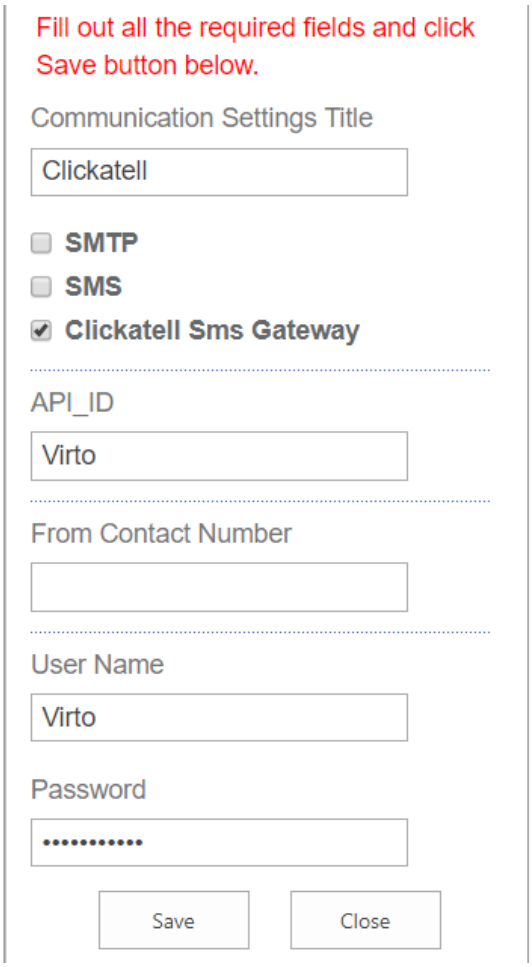

You have to register on www.clickatell.com and register the HTTP product. Go to the HTTP API page and click on the grey button 'Register for Free' in the upper right corner of the page. Fill in your registration credentials on the registration form and click "submit". The 3 parts of information that you need to send in SMS are your "username", your "password", and your API_ID. Your API_ID gets issued immediately upon confirmation of registration.

Note: after registration you will automatically receive 10 FREE SMS credits which you can use for testing.
Now, use the following information for creating Clickatell communication and fill out the displayed fields: user: xxxxx password: xxxxx api_id: xxxxx

Learn more how to create a Clickatell connection
https://www.clickatell.com/developers/api-documentation/http-api-send-message/
https://archive.clickatell.com/developers/api-docs/http-using-the-http-api/

Click “Save” and continue adjustment.

Note: SharePoint Service needs Internet connection for sending SMS Alert using Clickatell service. Local connection is not enough for successful operation.

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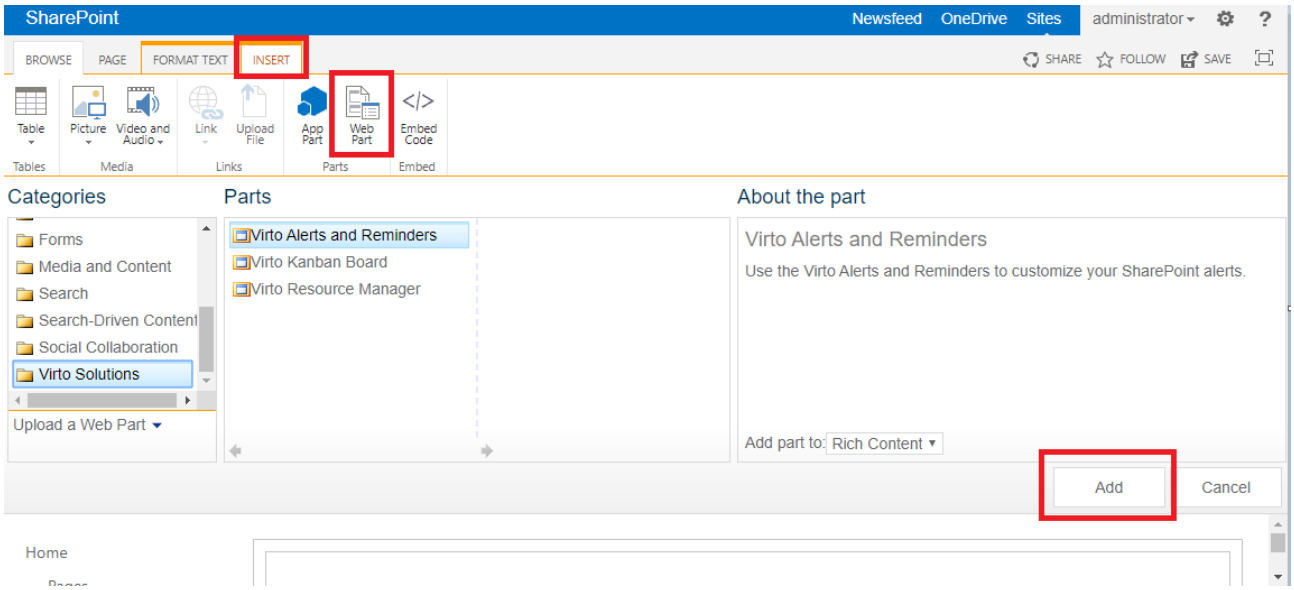
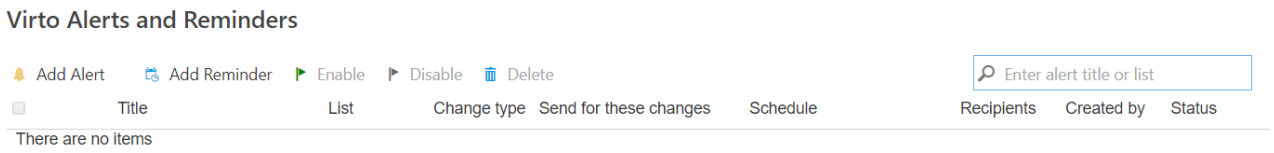
SharePoint Alerts Usage

You have to add Virto SharePoint Alerts web part to a SharePoint Site page.



Click “Add Alert” to create a new alert.

Information form with four tabs will be displayed: “General”, “Recipients”, “Message View”, and “Options”.



In the “General” tab you have to enter a title for new alert. Then select a web and a SharePoint list, which changes you will follow with this alert.

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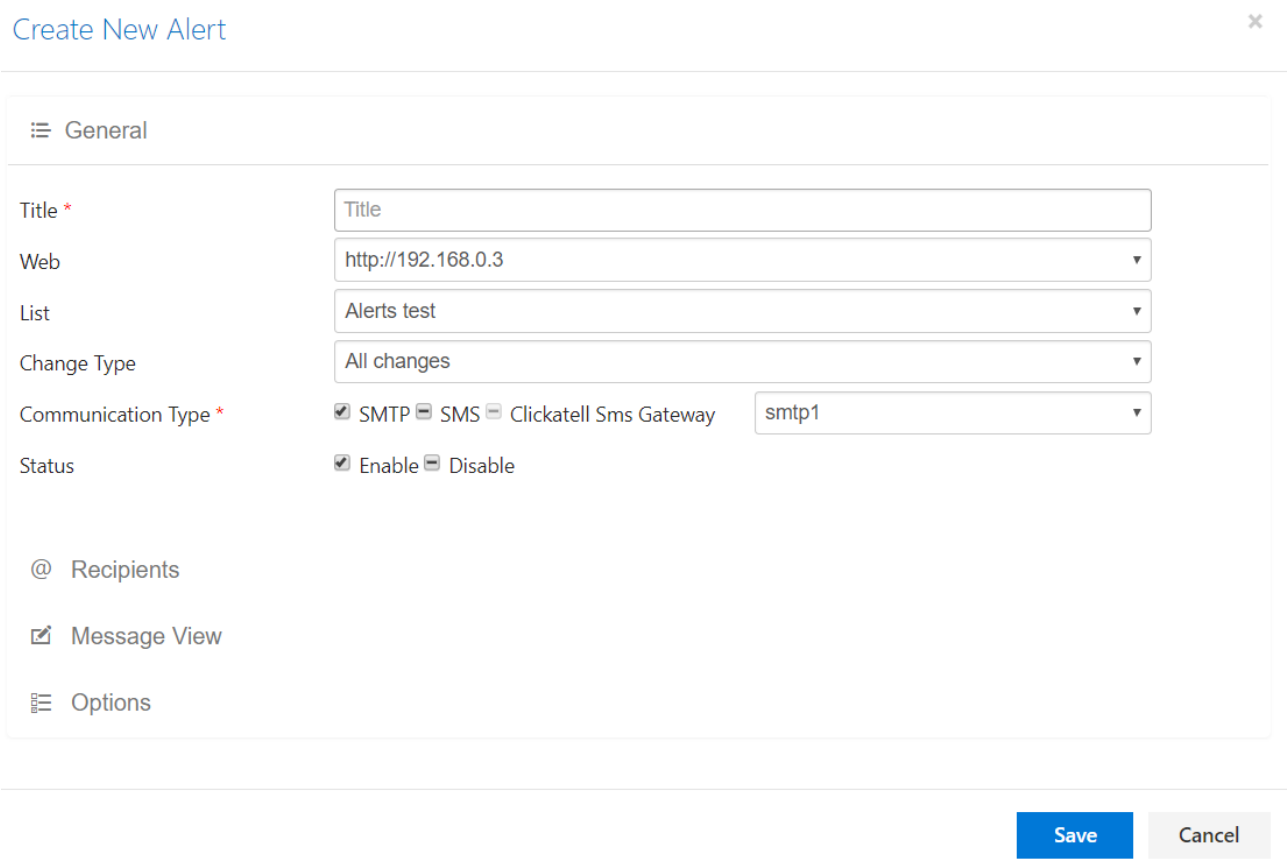
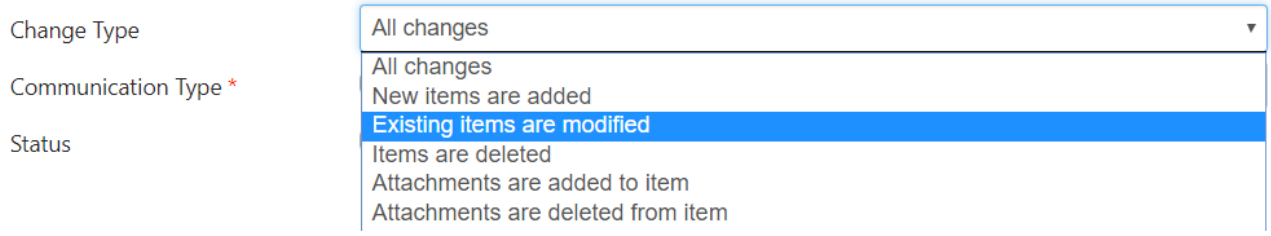


Select action about which the alert will notify. Six actions are available in the current version:

- All changes (combines all cases together);
- New items are added;
- Existing items are modified;
- Items are deleted;
- Attachments are added to item;
- Attachments are deleted from item.



You need to select communication type. These settings can be adjusted in “Edit web part”.

In case you have several communication types adjusted, you can choose a required one from dropdown menu.

If a communication type is not adjusted, this value is displayed as unavailable (grayed out “Clickatell Sms Gateway” on the picture below).

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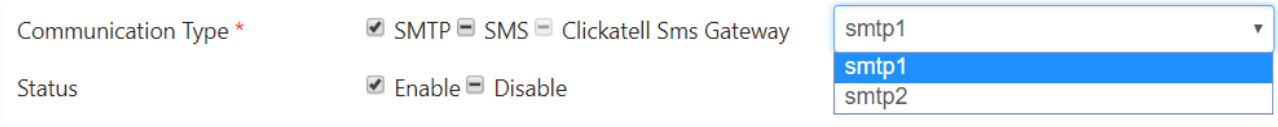
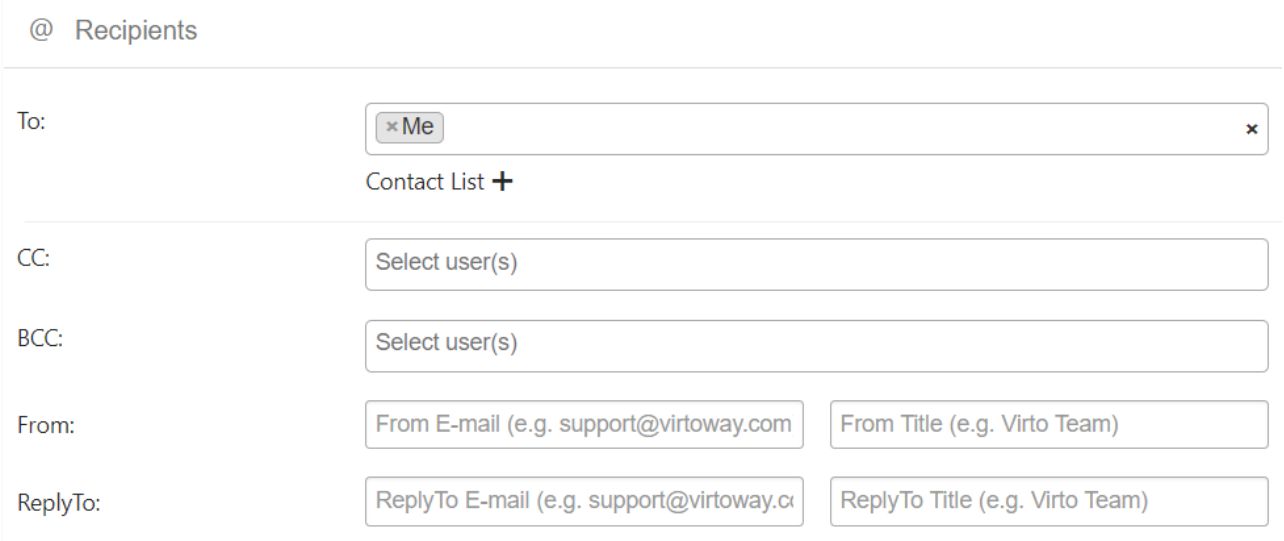


Now, choose “Enable” or “Disable” status. “Disable” means the created alert will not be sent.

Recipients Settings

Switch to **Recipients** tab. Here you can add a list of recipients who will receive this alert.

By default, a user can send alerts to himself only (to “Me”).
Your must have an administrator permission or be a member of a group listed in web part’s settings to send alerts to other users.



If you have the administrator’s permission, there are several options of recipients’ selection.

The first option is a **Set of users or e-mail addresses**. You can start typing at least 3 letters of a username or user group and get suggestions with an autocomplete option.
Also, you can select any current list’s fields, that contain users (Assigned to, Created by, Modified by, etc.). For example, you can select “Assigned to” option to send alerts to users assigned to work with a task. This option enables to set any amount of names or addresses.

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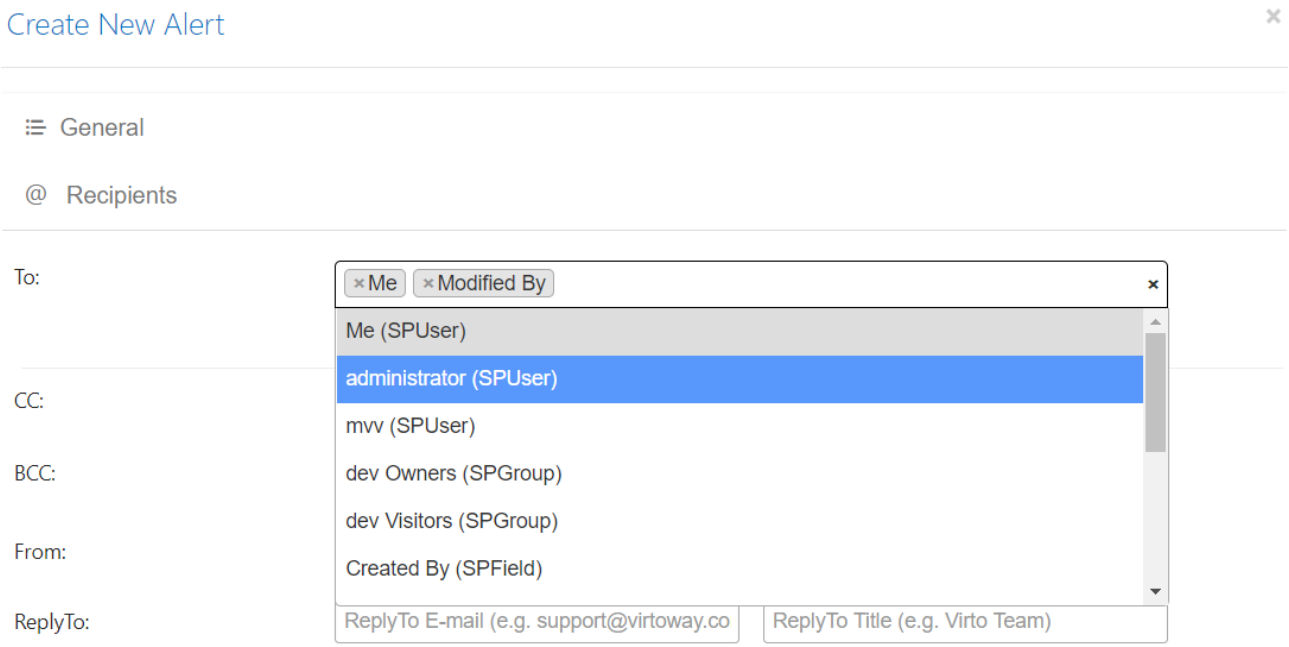
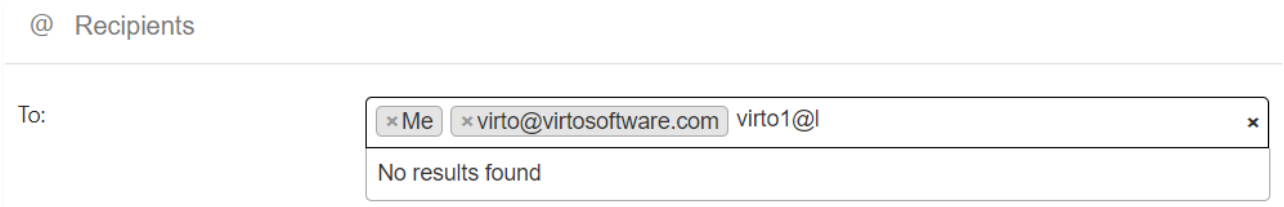


The second option is **Me**. An alert email message will be sent to the user who has created this alert.

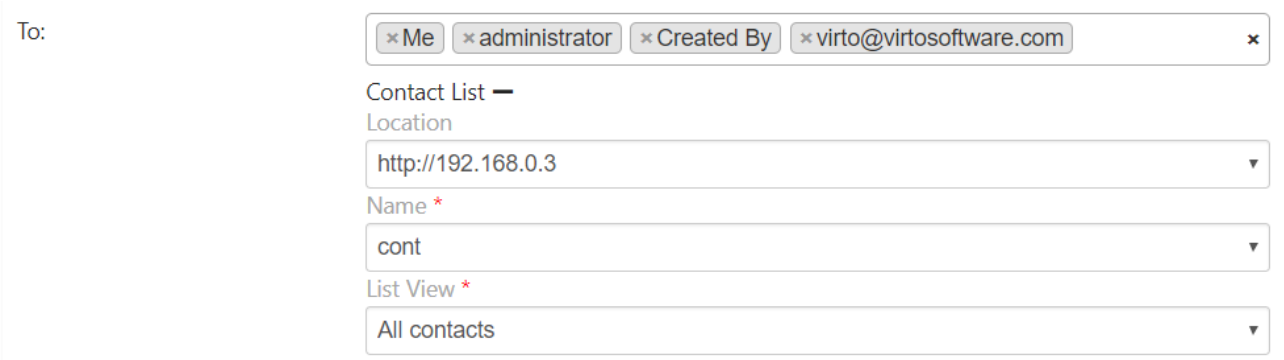
The third option is **External email addresses**. You can type an address in the field and press Enter to save it in recipients list.



You can assign multiple recipients in this field and select both recipients from a field in current list and recipients with emails. In this case, you will send them all this alert.

You can also send alerts to users from a SharePoint Contact list.

Click on “+” next to Contact List and fill out fields to select location, name, and view of list.



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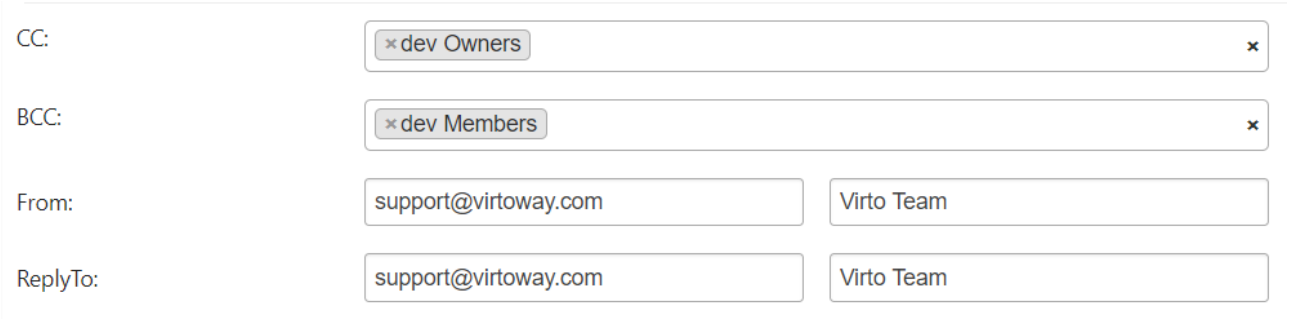
Next, you can add optionally field values for carbon copy and blind carbon copy. These fields have the same rules to add addresses as the field “To”.

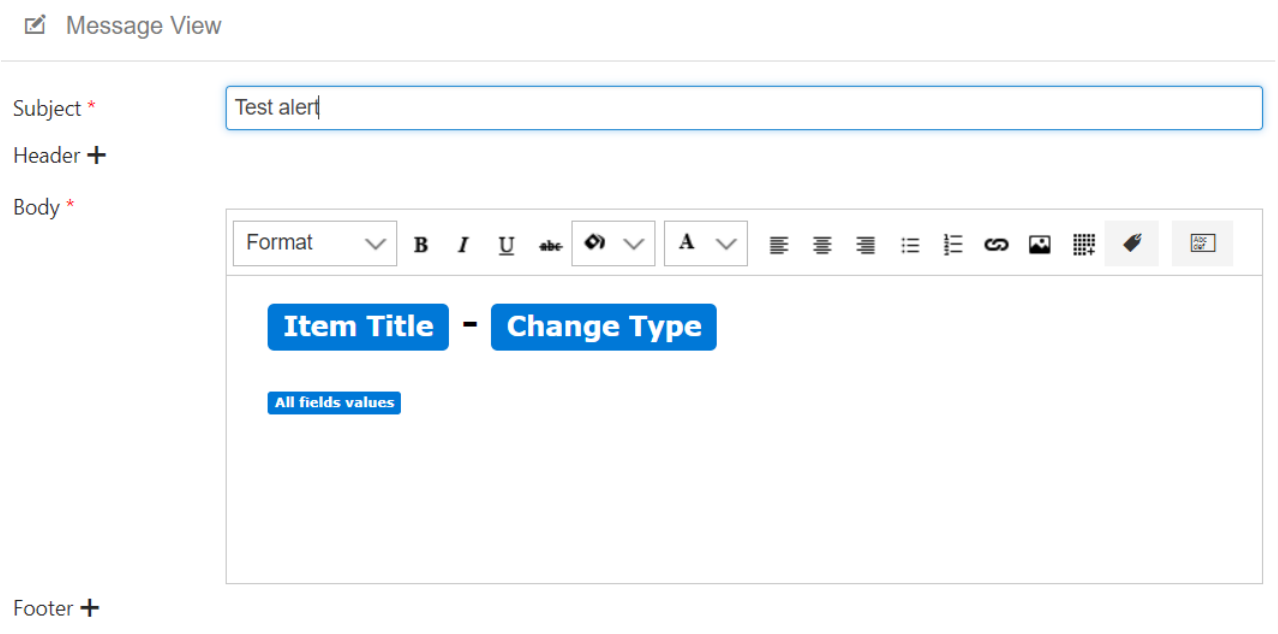


You can also add “From” and “ReplyTo” values to your email alert.

Note: Please ensure the smtp server is properly adjusted and doesn't have security restrictions, which are interrupting alert email delivery.

Message Template Settings

Switch to the **Message View** tab.
There you can see default alert tags in message body, which you can change as well as any other information in a message.



Default tags are already displayed on message body. You can delete them and add your tags by clicking on tag icon.

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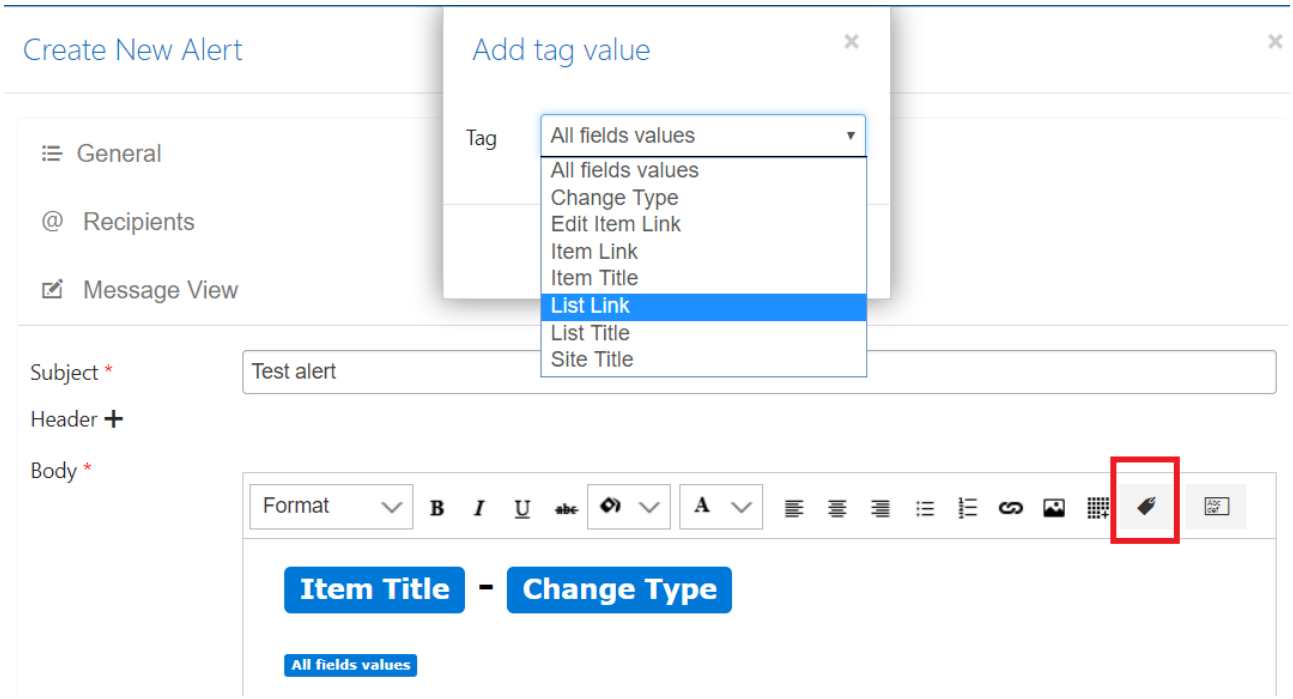
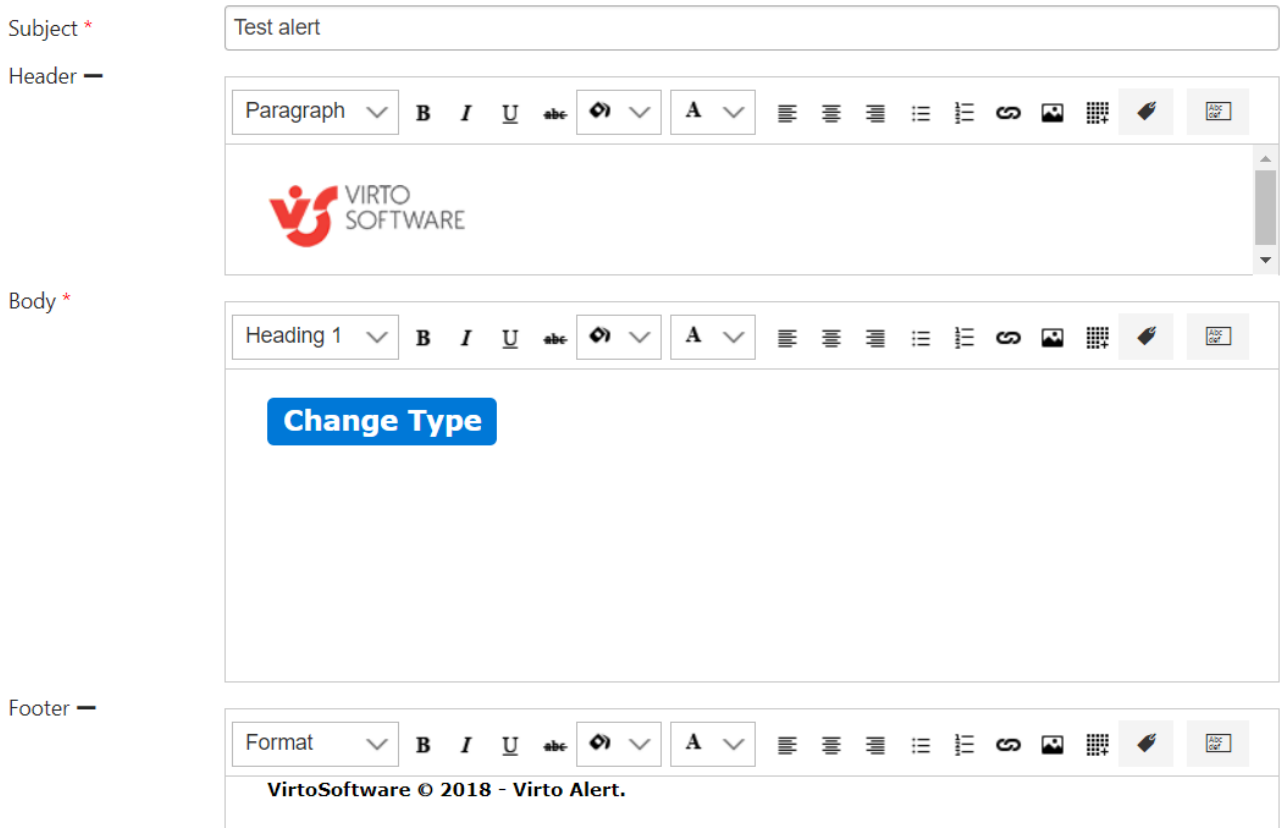


Click "+" next to Header or Footer to open and customize these sections.



The "Body" section allows you to define a message view for recipients.

The result of template adjustment may look this way:

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Subject *

Test alert

Header

Paragraph

VIRTO SOFTWARE

The "Test alert" list has the following changes this week

Body *

Format

Old: Due Date	Old: Title
New: Due Date	New: Title

Item Link Learn more on our site

Footer

Format

VirtoSoftware © 2018 - Virto Alert.

Alert recipients receive email messages as follows:

Test alert

VIRTO SOFTWARE

The "Test alert" list has the following changes this week

2/14/2018	Event 1
2/24/2018	Event 1

Event 1 Learn more on our site

VirtoSoftware © 2018 - Virto Alert.

Message options

You may include links, pictures, or tables into the alert e-mail.

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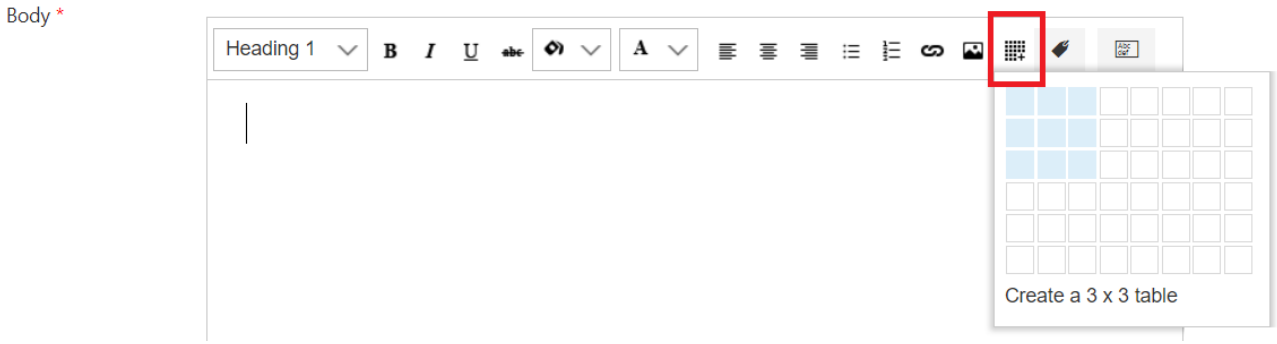
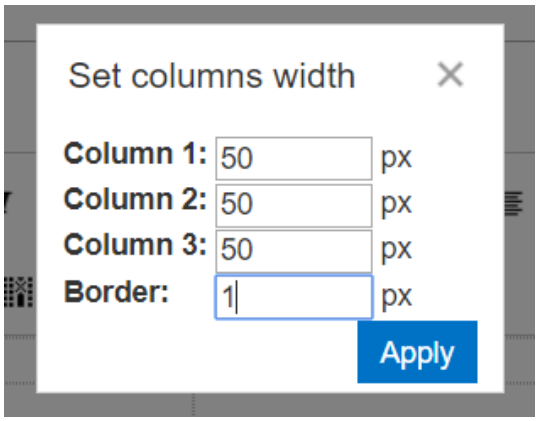
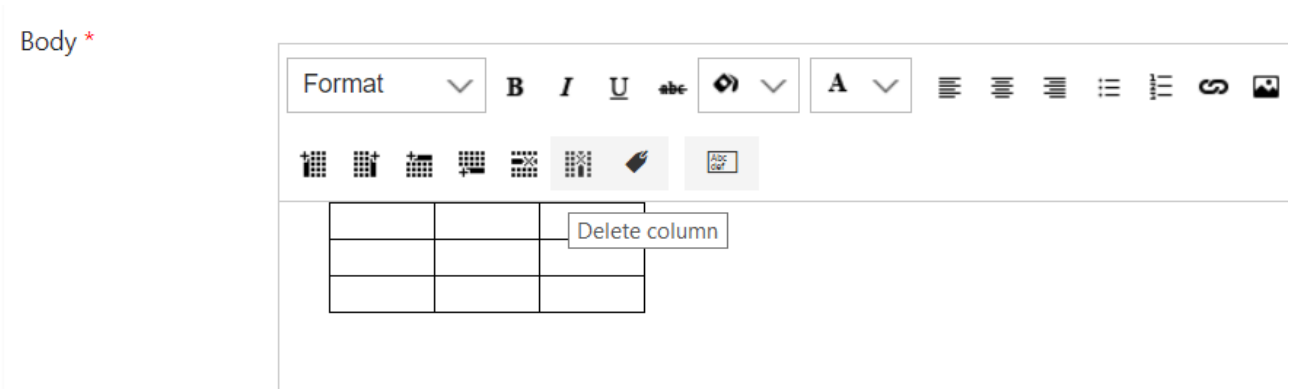
You can create tables in your alert and define the value of table border and columns width. Choose the count of columns and rows in your table.



Then define values for columns width and border in pixels.



Now, you have a table in your alert message. You can add or delete columns and rows with additional buttons.



Note: if your alert has an item from lookup, the item will contain link to view form of this item. For example, if your alert has a “client” lookup field, you receive in alert this field with link to client`s card view form from lookup.

Field values change tracking

You can add to message some list field, which values will be sent in the created alert.

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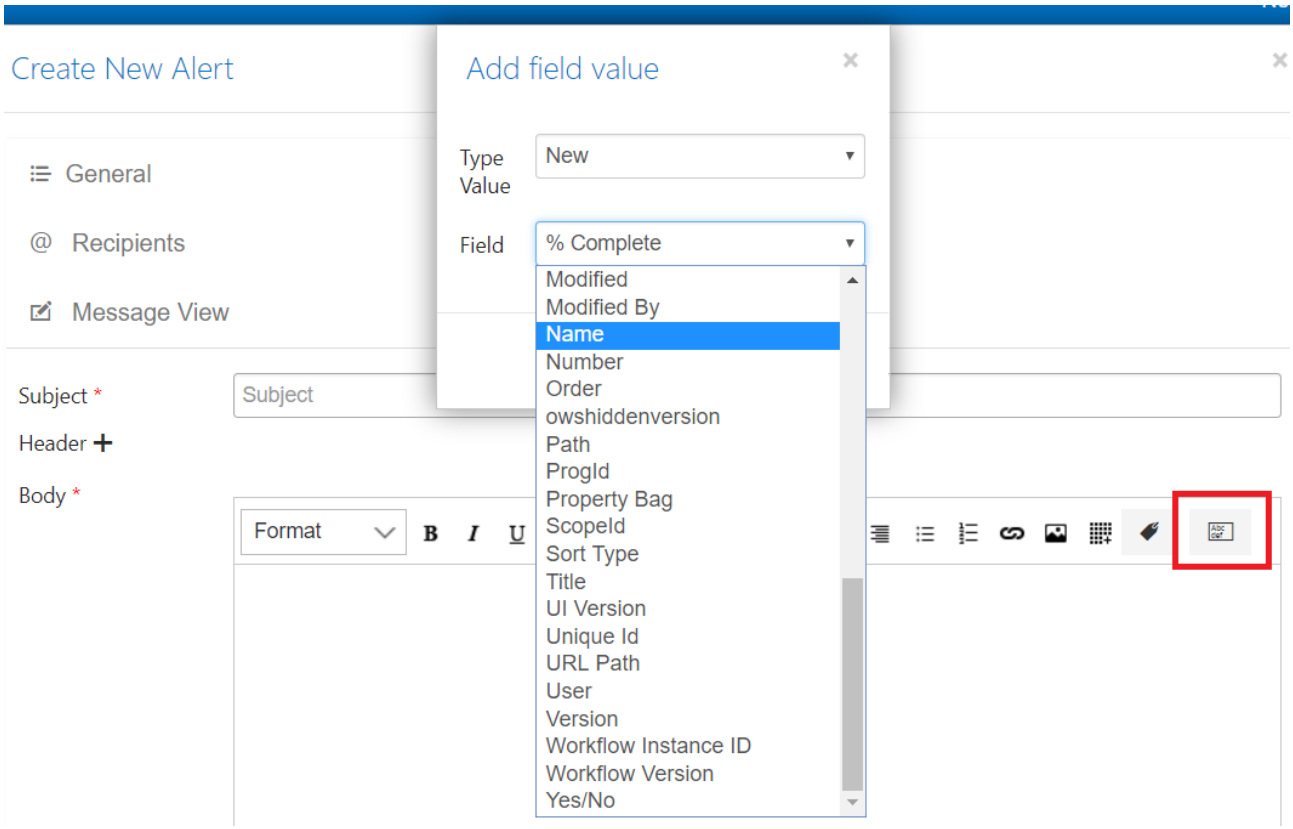
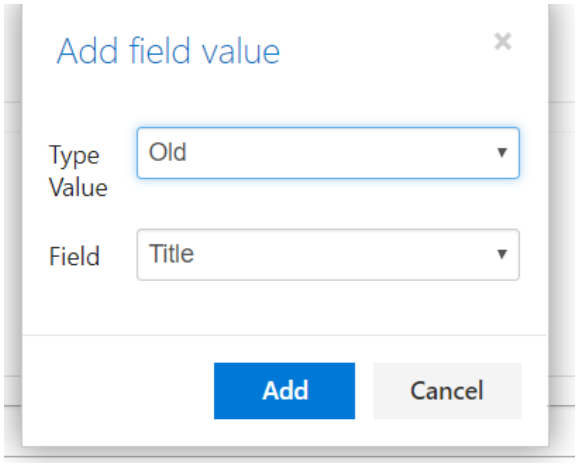
Click on the “Add field value” button in email body and choose required values for tracking in the created alert.



In the following example, we will track “Title” field changes.

Choose “Old” or “New” value type for tracking and select a list field for created alert.



Add some text, and the email body will look like follows:

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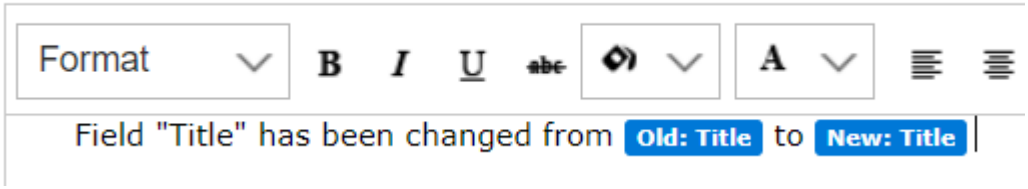
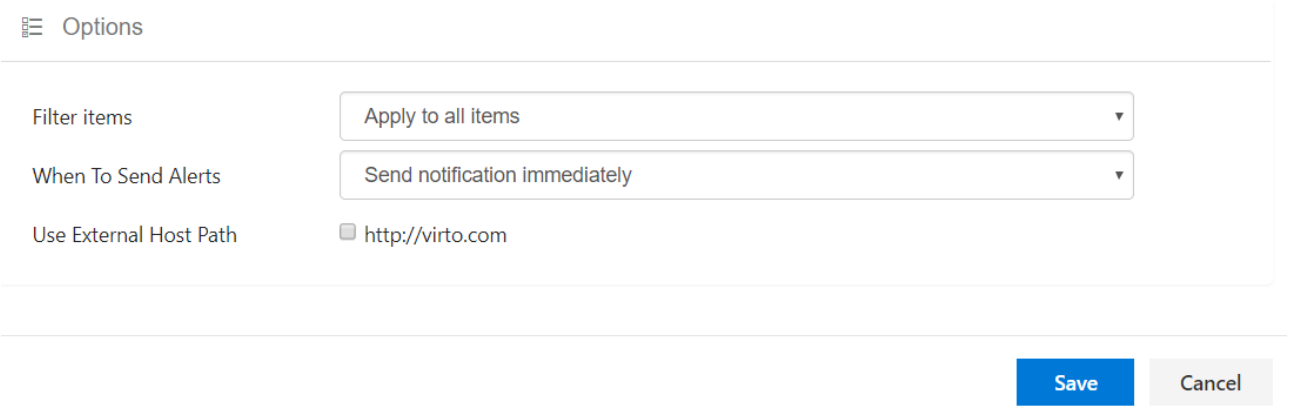


Options

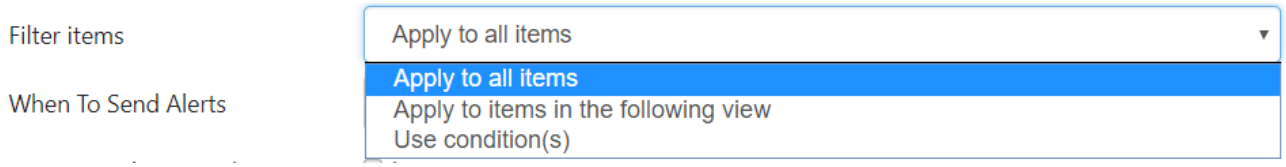
You can create your own custom schedule to send SharePoint Alerts, that means you can define conditions for sending and a period when alerts should be delivered. For instance, you can receive an alert if someone changes an item only within working hours (8 AM to 5 PM). You can also define days of week to send alerts.

There you can also define an External host path.
External host path allows users to replace the host part of the site link, item link, and item URL, that can be inserted in e-mail alert messages. This feature is usually used to provide SharePoint users logged in from external local domain with a public host path to the SharePoint web server. For example, if you enter http://wssportal.yourcompany.com/, outside users will receive alerts with links on item but site links in their e-mail alerts will be changed from http://YourInternalServerName/ to http://wssportal.yourcompany.com/... and will be available for those outside of the network.



Choose a changes type, according to which the alert will be sent.

- Apply to all items;
- Apply to items in the following view;
- Use condition (s).



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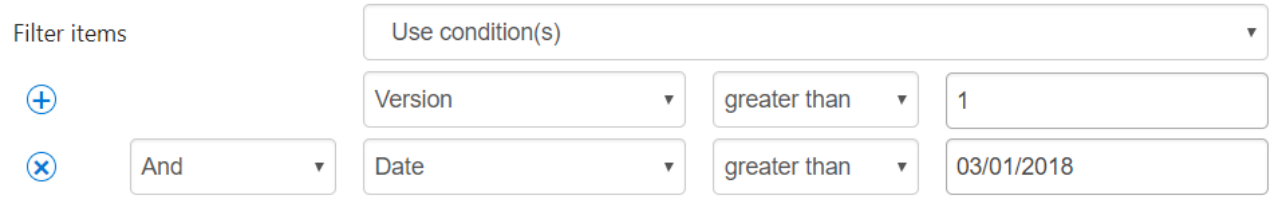
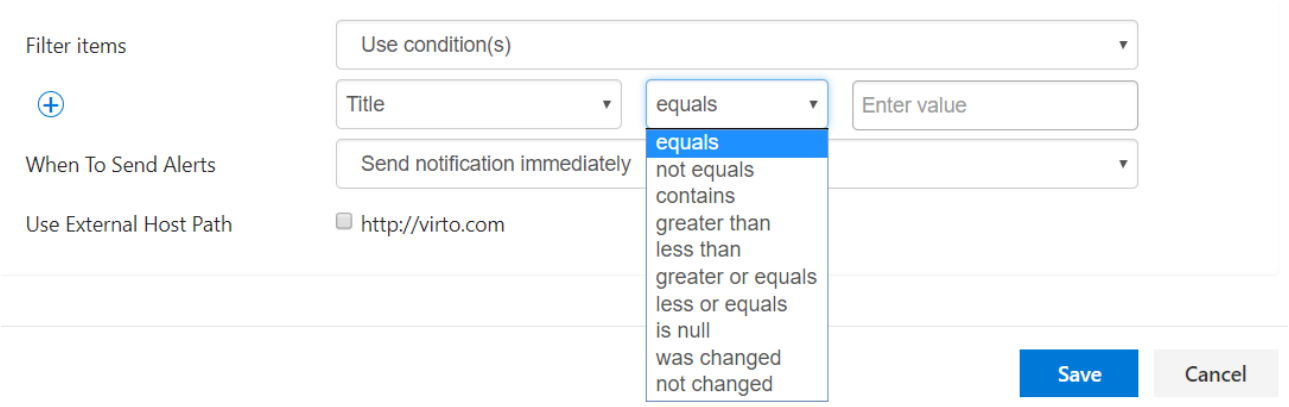
You can create a custom condition for more precise selection of items, that trigger the alert.

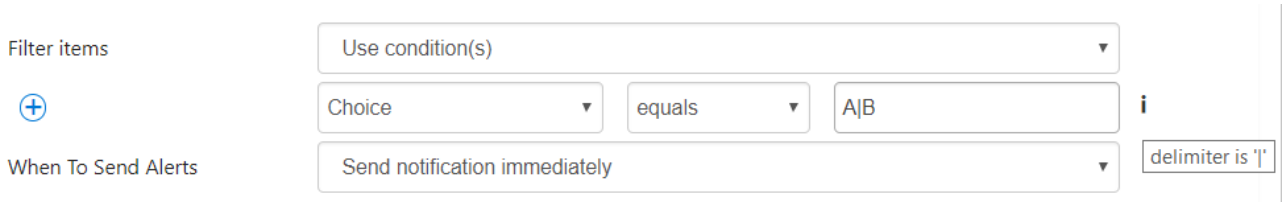
Click “Use condition” and define an item field, select a condition from list and type a value. You can add several conditions, using And and Or operators.



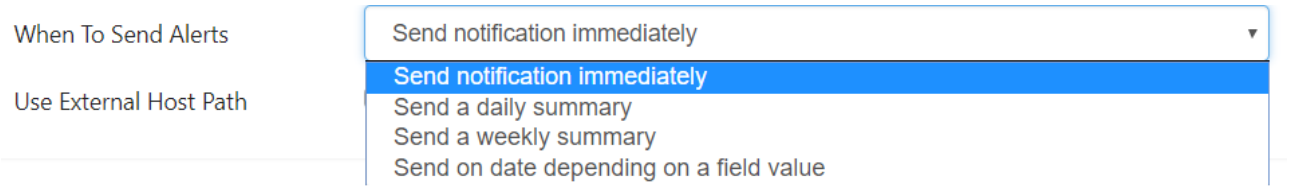
You can add new condition by clicking on “+” button or delete a condition using “X” button.
To track changes in a specified list field, select “Use condition”, choose the required field and use “was changed” or “not changed” condition.



If created condition includes values from multiple choice field, use delimiter “|”.



Then you have to define the alert schedule.



You can send it immediately after any changes occurred or create a daily or weekly summary schedule.

If alert condition was triggered a few times per day, all alert emails are merged in a single daily (or weekly) summary alert.

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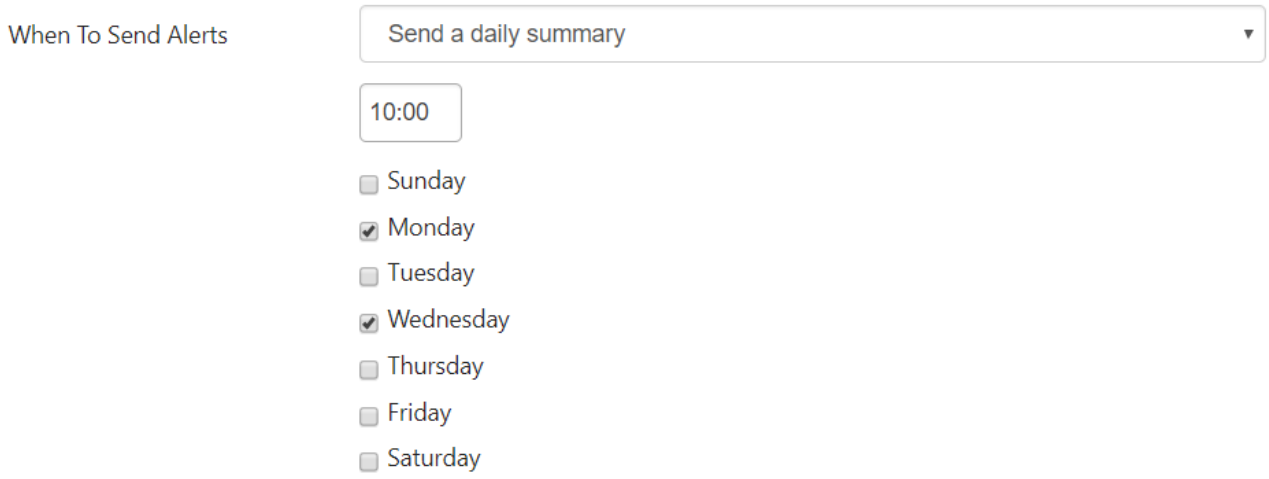
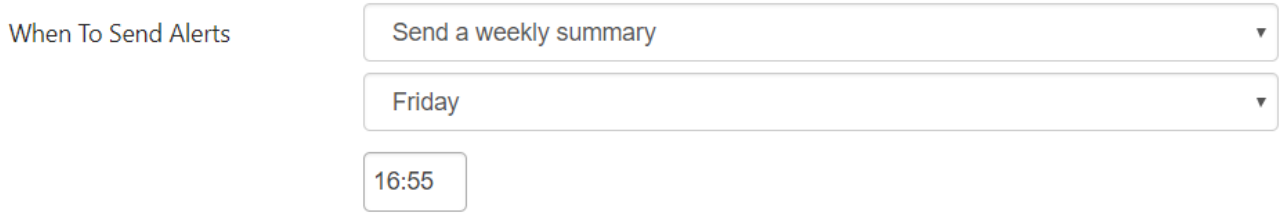
If you select “Send a daily summary”, select required time from dropdown and tick boxes with days when you will to receive a summary.

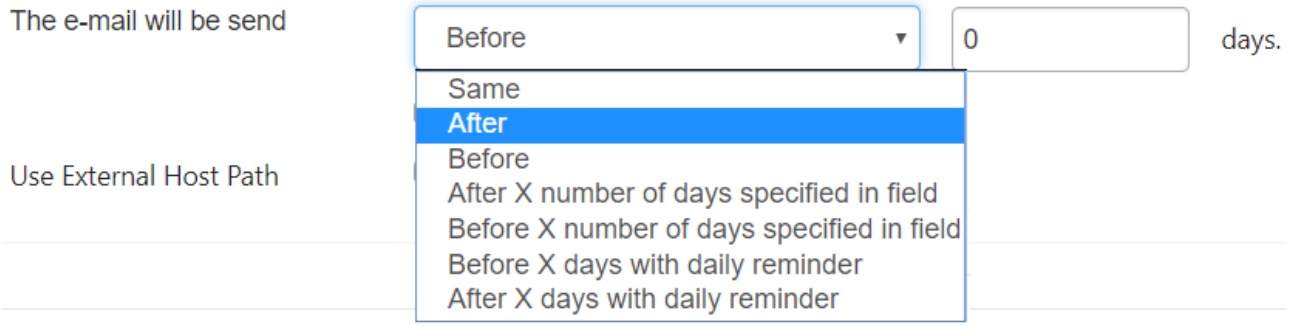


Alert will be sent according to settings at 10:00 only on Mondays and Wednesdays.

“Send a weekly summary” option allows you to send alert on a chosen day of week.



The next option allows you to send alert on the specific date based on the list’s date field value.



Same Date, After, and Before

You can send alert on the same date as the date from a chosen field value. In this case, you need to set the exact time when the alert will be sent.

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When To Send Alerts: Send on date depending on a field value

Due Date

The e-mail will be send: Before 2 days.

☑ Set Time

12:30

You can set time for “After” and “Before” options as well.

Note: If the format of a chosen field is not the Date and Time, but Date Only, you have to set time for alert sending. The same setting can be required if you send an alert for recurring events or for an all-day event.

When To Send Alerts: Send on date depending on a field value

Due Date

The e-mail will be send: Before 2 days.

☐ Set Time

If you do not define a time, in the example above it will be used time of field “Due Date”. If this field has a date only and doesn’t contain time, email will be sent in midnight, using server time.

The count of days from additional field

You can send an alert according to a day count from a value taken from a custom number type field. For example, you have in a list the Due Date field and a custom number type field.

✓	Title		Number of days	Due Date
	Event 1	•••	4	2/14/2018
	Task 2	•••	3	2/14/2018

Select the option “Send on date depending on a field value” and choose Due Date field. Then you can assign a count of days from a custom field to send the alert.

For example, the value in the custom “Number of days” field is 3. Select the “After X number of days specified in field”. Then choose the custom list field with a number. In this example, we have value “3” in this custom field.

This means, you will receive this alert on the third day after the date in the “Due date” field.

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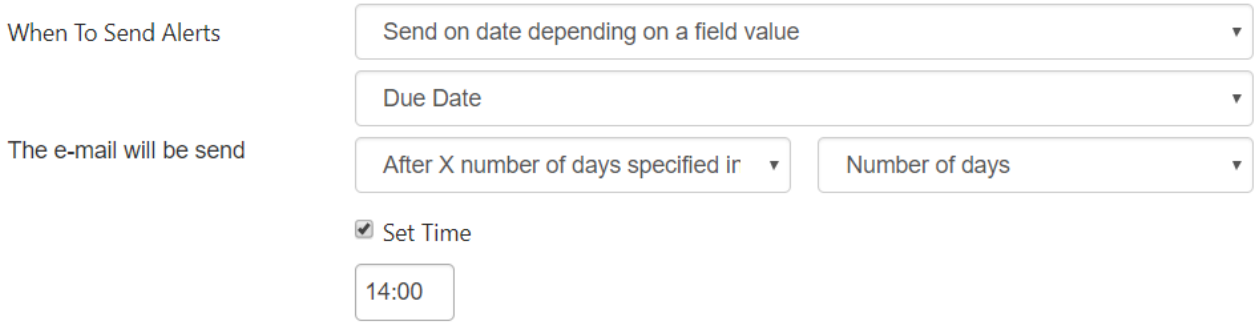
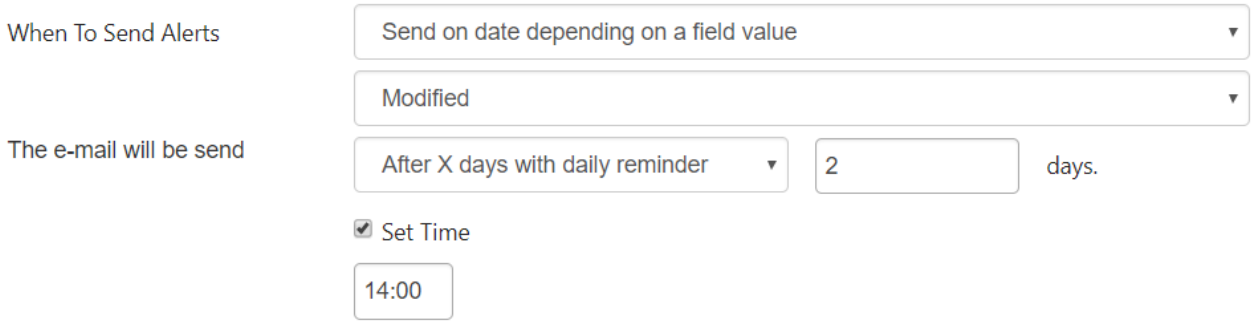


Daily reminder

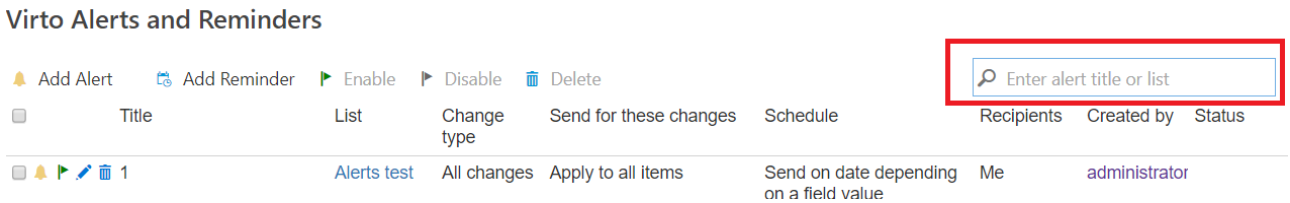
You can customize the schedule to send reminders.
It is possible to send daily reminder before or after the specified number of days.
In the example below, a user will receive reminders at 14:00 in 2 days after and 1 day after the event was modified.



Press "Save" to save the created alert.

Alerts managing

When the list of alerts subscriptions is too large to find a required item, you can use search filter by title or list name



You can enable/disable created alerts and reminders: tick the box opposite alert or reminder and click "Enable" or "Disable" button.

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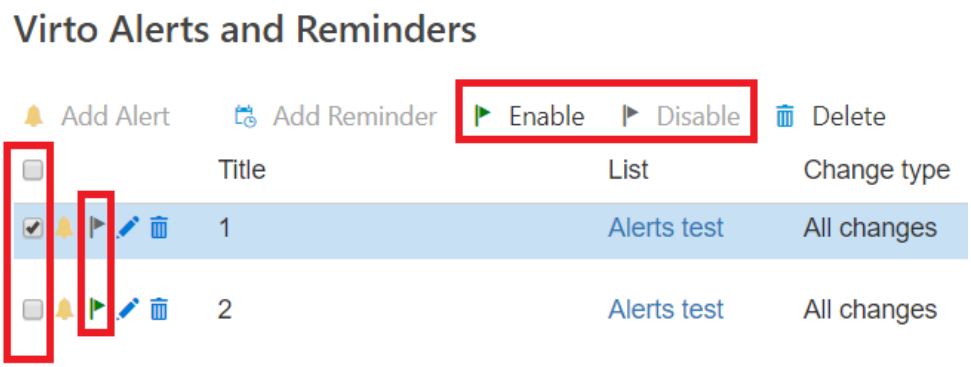
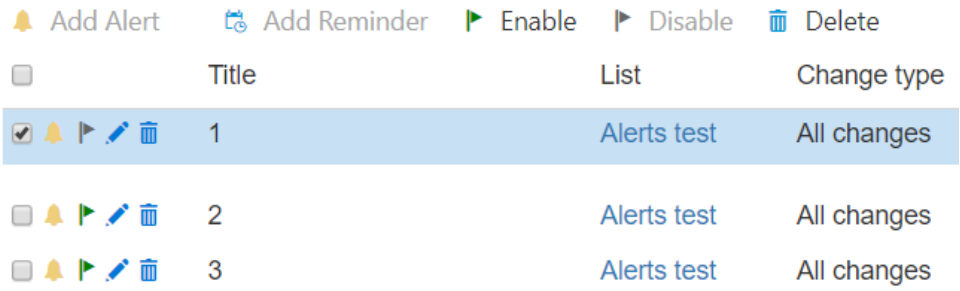


The current status of an alert or reminder is displayed on the left side. If the status mark is highlighted green, this alert/reminder is enabled.

Also, you are able to edit or delete created alerts by clicking on the corresponding symbol.

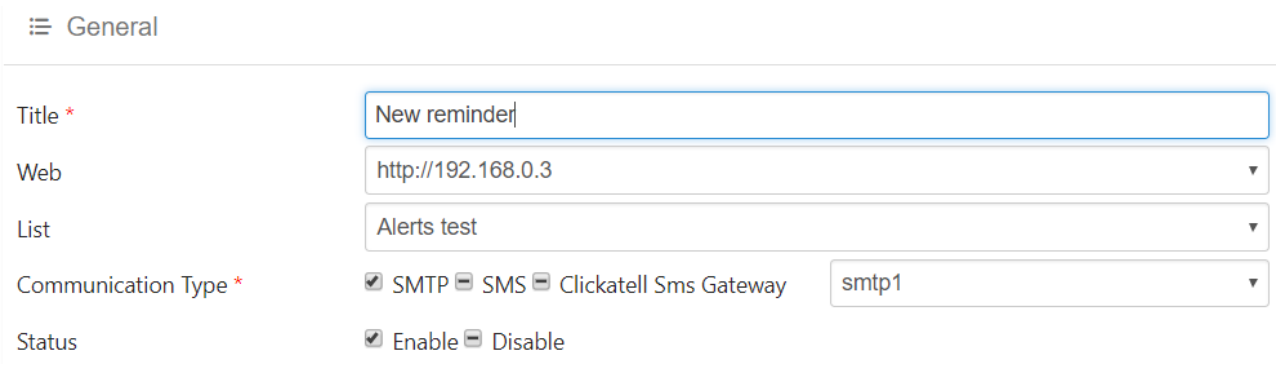


SharePoint Reminders Usage

Virto Alerts and Reminders web part allows you to use email and sms reminders that are sent to remind about upcoming events or approaching deadlines.
Whenever you schedule a reminder, each user assigned to this reminder will receive email or sms with notification, which can include the fields that need his attention.

Click “Add Reminder” to create a new reminder.

Select a list with event(s) that you will be notified about. Type the title of the new reminder.



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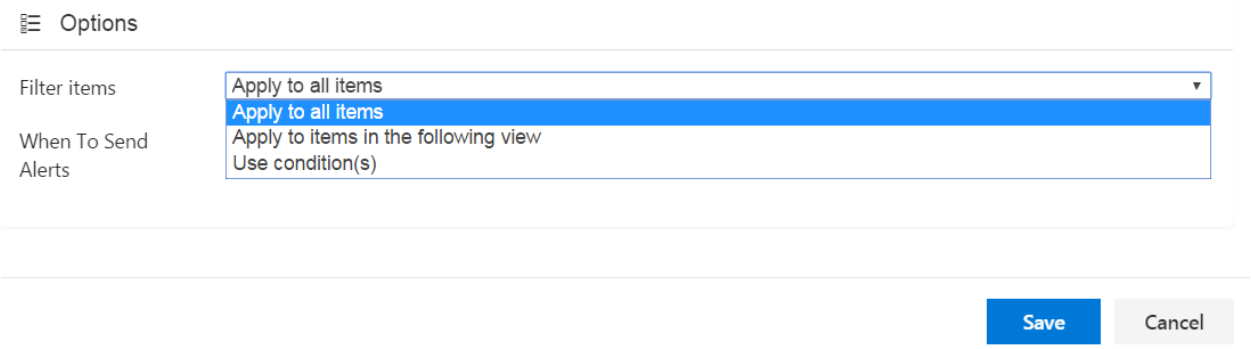
This section is similar to Alerts customization, the difference is in the lacking “Change type” field.

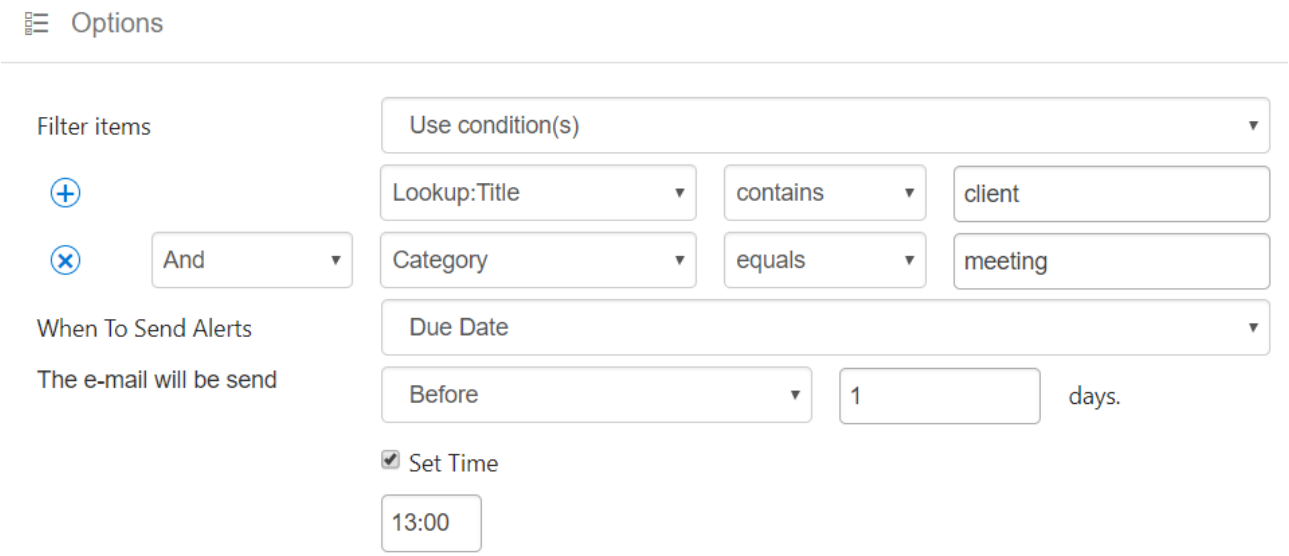
The next two sections “Recipients” and “Message view” can be adjusted similar to Alerts customization.

Then you need to define options to follow up an event.

You can apply the reminder to all items in the list, to all items in a list view or create a custom condition to receive a reminder.



In this example, we will use a custom condition to track any upcoming meetings with clients.



Then you need to set the schedule when you will to receive the notification.

You have to select a list field with time/date that will trigger the reminder sending and type the time when you need to receive the reminder.
In this example, the reminder will be sent one day before the event begins.

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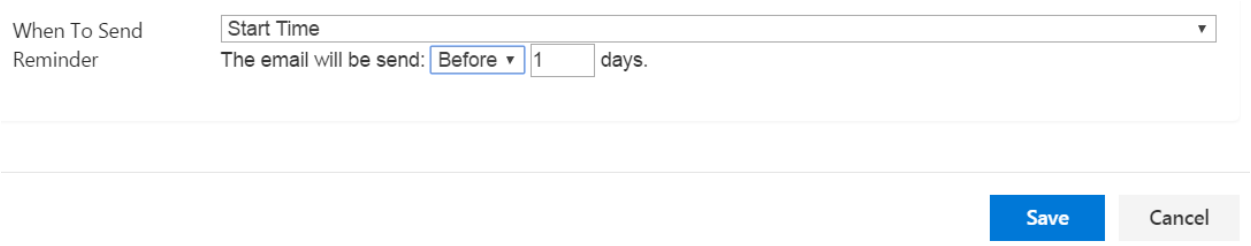
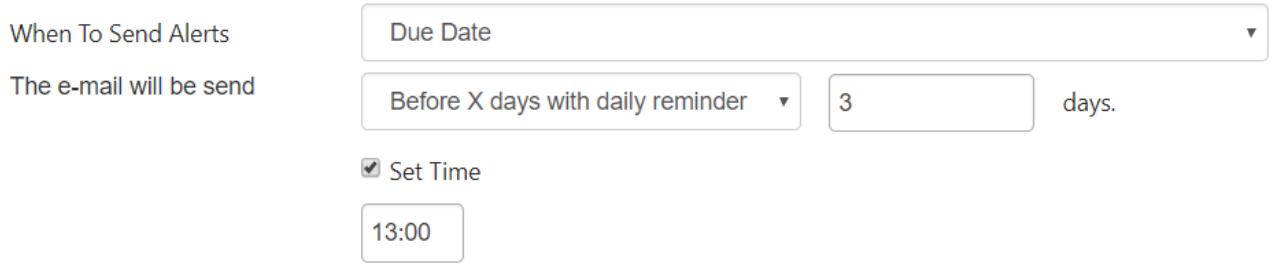
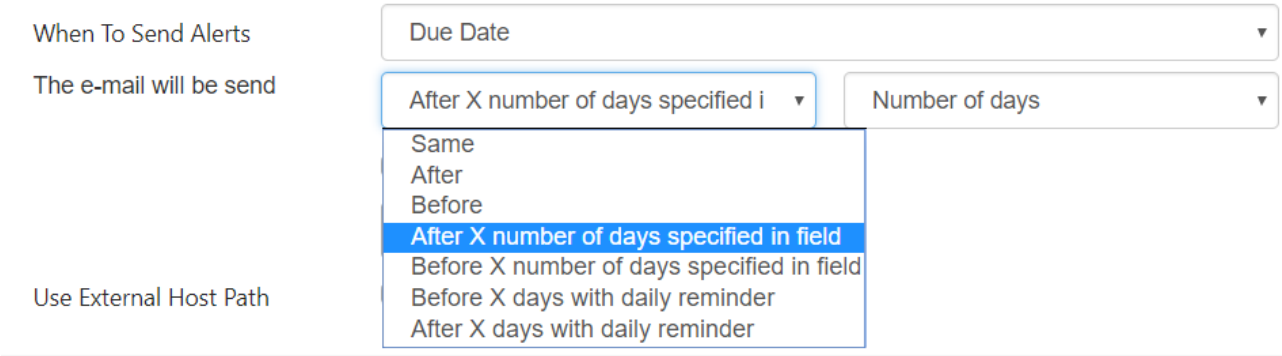


You can also send daily reminders before or after the event.

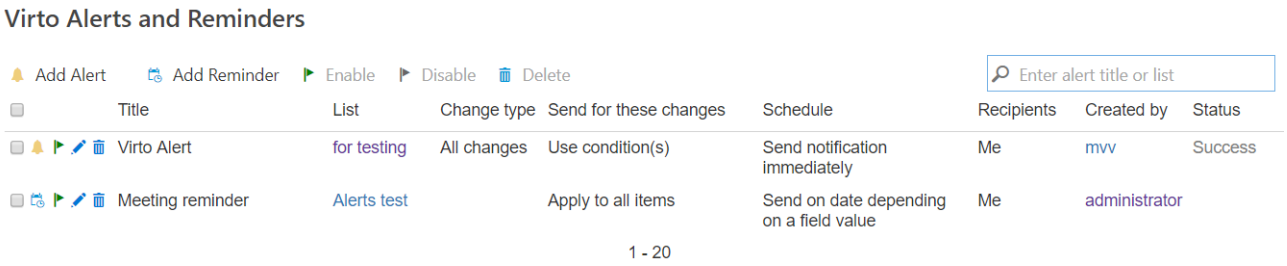


The next option is the specified number of days in a list field.
See **The count of days from additional field** section in Alert description of this documentation.



Note: reminders for recurrent events are supported as well.

Now, you can manage all your alerts and reminders in a single view.



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Version release history

2019-10-21	v. 5.1.15	[-] Separate errors between Reminder items [-] Internal bugs
2019-09-24	v. 5.1.14	[*] Notification "Same time"
2019-08-08	v. 5.1.13	[*] Refactoring [-] Internal bug fixing
2019-07-31	v. 5.1.12	[+] Tag 'Table view fields changes'
2019-03-19	v. 5.1.11	[-] Internal bug fixing
2019-01-15	v. 5.1.10	[*] Refactoring [-] Internal bug fixing
2018-12-11	v. 5.1.9	[*] Changed logging [*] Changed logic of notification
2018-11-27	v. 5.1.8	[-] Fixed Encoding problem of SPLIstItem values [-] Fixed Problem with empty header of Message View
2018-11-15	v. 5.1.7	[*] Fix license validation
2018-11-14	v. 5.1.6	[*] Internal optimization
2018-10-01	v. 5.1.5	[+] Add ability Send separate e-mail for each item [+] Add support MS SQL Server for pending data
2018-05-31	v. 5.1.4	[-] Fix some bugs [*] Improve UI [+] Add ability Include Item Attachments
2018-05-24	v. 5.1.3	[+] Fix License messages
2018-05-24	v. 5.1.2	[+] Paging request (GetRecipients) to asmx service
2018-05-23	v. 5.1.1	[+] Logging GetRecipients function in asmx service
2018-05-21	v. 5.1.0	[-] Fix css [-] Fix setting recipients (manual adding) [+] Ability to Customize email subject
2018-05-15	v. 5.0.5	[-] Bug with reminder multi user field has been fixed.
2018-05-10	v. 5.0.4	[*] Allow more users to update the alerts timer job.
2018-04-19	v. 5.0.3	[-] Bug with multi user field has been fixed.
2018-03-30	v. 5.0.2	[-] Bug with timer job has been fixed.
2018-03-20	v. 5.0.1	New release for SharePoint 2013 and 2016 [+] UI redesign [+] CC copy, BCC copy, ReplyTo options were added [+] Extended features for alert email customization: pictures, links, tags, a field value tracking [+] Extended alert sending schedule

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