

# SETTING UP THE ALERT SERVER



Original Software



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## SYNOPSIS

The Alert Server is run as a service, this will make a connection to the database and run a pre-defined rule.

The rule can run against multiple Instances, the Alert will run a filter at predetermined times and either sent an email with the record counts or details about a single record.

Typical usage would be to alert a manager or team when the number of defects in a certain status was reached, or an allocated piece of work had not been started.

The Alert Server is beneficial to alert staff with push notifications.

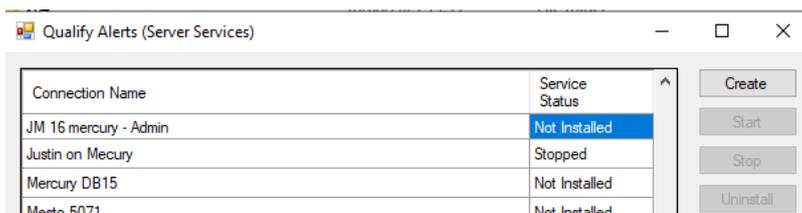
## QUALIFY ALERT SERVER

The Alert Server will need configuring on a PC or Server that would normally be available 24/7. For this reason, the SQL database server is ideal but not a prerequisite.

The PC or Server that is to be used as the Alert Server would need to have Qualify installed and configured to access the desired database.

### Configuring the Alert Server

1. Log into Windows as a user with relevant permissions to create and manage services
2. Browse to the Qualify Install path, by default this will be similar to 'C:\Program Files (x86)\Original Software\Build XXXX' (where XXXX is the built number).
3. Locate and run the 'QualifyAlertsServer.exe', right Mouse and select 'Run as Administrator' if applicable.
4. This will launch the 'Qualify Alerts (Server Services)', which will list all of the separate connections you have configured in Qualify. You will need to create a separate service for each separate installation.



5. Select the relevant connection and select 'Create', this will create the service in a stopped state. You can start the service here or manage this via the Services applet.
  - a. Open Service and locate the new service, this will be names QualifyAlerts followed by the connection name.
  - b. Editing the Service will allow you to change to a Startup type of automatic and changing Log On if required.

## Qualify Configuration

Setting up a Qualify connection to the database, you can either connect using a SQL username and password or connect with Windows Authentication. When setting up the service, you will want to log on with a user that has permission to connect to the database.

### Connection Details

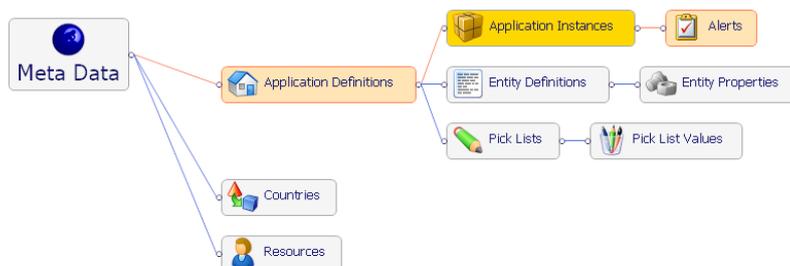
Connection Details

Server:	<input type="text" value="LDAP-TEST\SQLEXPRESS"/>	(Name or IP Address)
Database Type:	<input type="text" value="Microsoft SQL Server"/>	
Friendly Name:	<input type="text" value="Production"/>	
Library/Schema:	<input type="text" value="TB_7PO"/>	Storage Pool: <input type="text"/>
Connect Using:	<input type="radio"/> Windows Authentication <input checked="" type="radio"/> Username/Password	Username: <input type="text" value="Qualify"/> Password: <input type="password" value="••••••••"/>
License Type:	<input type="radio"/> Runtime <input checked="" type="radio"/> Standard	(Runtime licensing only applies to TestDrive)
Slow Connection:	<input type="radio"/> Yes <input checked="" type="radio"/> No	(If set to Yes then Qualify will reduce the textual data displayed in the grids to improve data transfer times)
Default Connection:	<input type="radio"/> Yes <input checked="" type="radio"/> No	

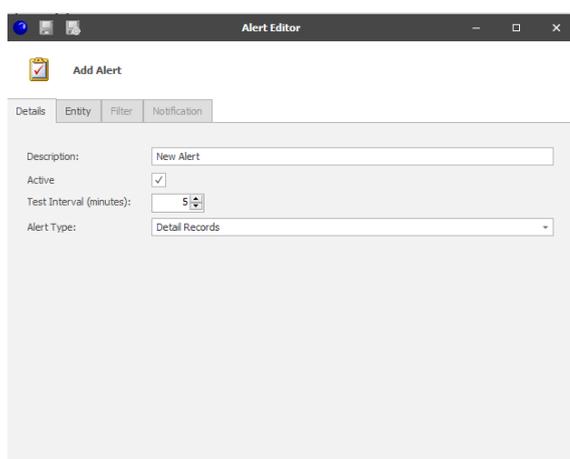
Using an SQL Username and password will be simpler, all connections will utilise the single SQL user

## Creating Alerts

1. Log onto Qualify as the Administrator or a user with relevant permissions.
2. From the left-hand menu select 'Management' followed by 'Administration View', from the following view, select 'Alerts'



3. From the Alert pane, right mouse click and select 'Add'
4. This will open the 'Alert Editor'



- a. **Description:** This is the description for the Alert
- b. **Active:** This allows you to turn the Alert on and off
- c. **Test Interval:** This is the period in minutes that the Alert will run, as this will create a connection and query the database this should be set to match how often you would like the alert to run.
- d. **Alert Type:** You can create a 'Detail Records' or a 'Records Count' type Alert.
  - i. **Detail Records:** This will create an alert when a record matches the criteria. For example when a defect has the status changed to 'Completed', you may wish to alert the owner.

- ii. **Record Count:** This will alert you when a counting condition has been matched. For example, you may wish to alert the developer manager if there are 5 or greater defects in the system that are at a 'New' status.

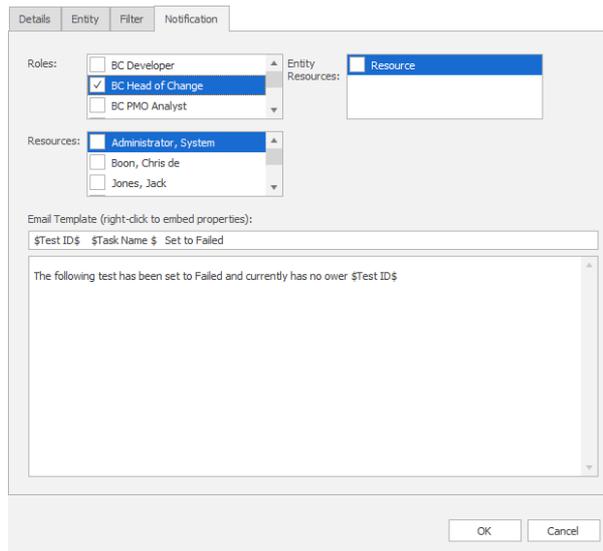
Alert Type:	Record Count
Operator:	>=
Value:	5

5. Select the 'Entity' Tab, populate the following:
  - a. **Application:** This is the Application Definition within Qualify.
  - b. **Entity:** This is the record type you wish to report on, for example, 'Test' or 'Defect'
  - c. **Instance Group:** If you have multiple instances grouped into an Instance Group, you can select it here. This would mean you would be running the alert on all instances in that group.
  - d. **Instances:** If you haven't selected an instance group, you will need to select one or more instances for this rule to apply.
  
6. Select the 'Filter' Tab, here you can build up a filter. When a record matches the filter the notifications setting will be followed. The record will then not be included in future alerts. In the below example, an alert will be raised when the Task Status is set to 'Test Failed' and the allocated resource is 'Blank'

The screenshot shows the 'Filter' tab in the Qualify software. The 'Test Sprint Task Status' entity is selected. The filter is configured with two conditions: 'Test failed' (checked) and '<Resource> = <Blank>' (checked). The notification settings are also visible, showing the alert type and operator.

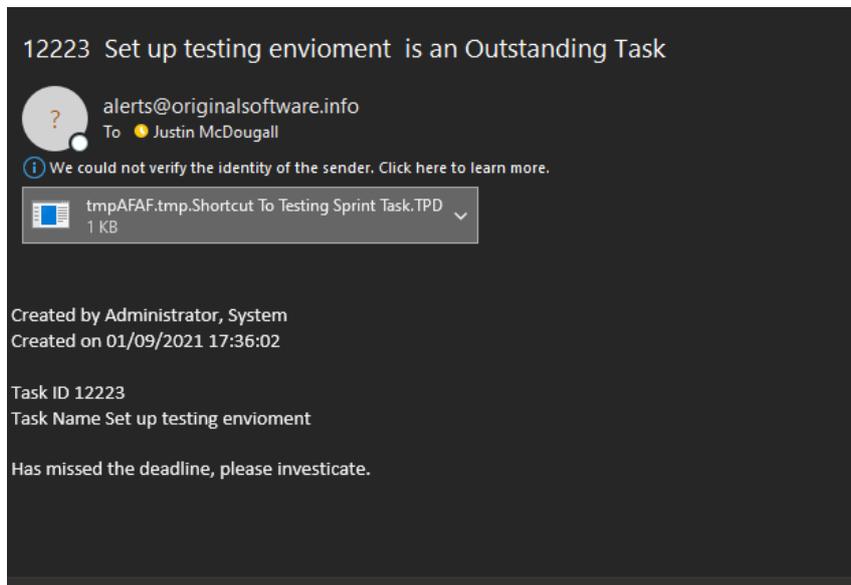
7. Select the 'Notification' Tab, here you can format the email alongside the alert email recipient(s).
  - a. **Roles:** Here you can email every resource within a Role, for example, all Team leads or developers.

- b. **Resource:** This is a list of resources on the system, you can select individual or multiple recipients.
- c. **Entity Resources:** This is a list of resources on the record, for example, you will be able to email the allocated tester or developer.
- d. **Email Template:** You can build up the email template that will be sent to the recipient. In both the subject header and the body you can right mouse click, and insert data from the record.



## Received Email

The received email will contain the parsed data that was set up in the Alert, this will also contain an attached file of type TPD.



If Qualify is configured on the PC, the associated record will be displayed when the attached file is selected.

