ZyALERT Manual

Contact Us

For full contact details, visit the ZyLAB website - https://www.zylab.com

For support, submit a ticket on - https://help.zylab.com

Contents

About ZyALERT: Automatic searches

ZyALERT is an SDI (Selective Dissemination of Information) module that may be used to automatically detect relevant information in huge archives. ZyALERT acts as an information agent which searches the data at set times based on user-defined profiles. The information found is then distributed by fax, e-mail, disk, or may be directed to a printer.

Principally, ZyALERT automates the searching and the distribution of information via e-mail. Users can get information automatically delivered by subscribing to an index. Such a subscription is based on a subscription profile or alert and a time schedule specifying what information should be delivered and how frequently it should be delivered. The subscription profile is in fact a ZyLAB query that is repeatedly executed against all new and modified documents in an index.

We can imagine that you are not entirely familiar with the concepts of SDI (Selective Dissemination of Information) or other subjects concerning information retrieval. Therefore, we have added this section on information retrieval and filtering.

Filtering information

With the increasing availability of information in electronic form, it becomes more important and feasible to have automatic methods to filter information. Most organizations generate large amounts of information, which can include incoming faxes and letters, departmental and technical memoranda, announcements of meetings and conferences, and minutes of meetings. This volume of information makes it difficult to keep employees apprised of all relevant documents.

If you are part of an organization that has a lot of different interests, only a small fraction of the available information will actually be relevant to you and this information probably differs from information that your colleagues are interested in. The supervisor will have to address the problem and determine what information is of interest to any employee, while minimizing the amount of searching through irrelevant information.

People need to decide what information is important to them and, hence, they are constantly filtering the information they are exposed to. Most people read a paper by scanning the headlines to see which articles are of interest. In this way you filter out some of the large amount of information to which you have access. With more and more documents presented to us in digital form, part of the filtering can be handled by a system that presents the information. ZyALERT is such a system. It can filter all digital information and show you only those documents that are of interest to you.

Information filtering can work on behalf of the users as well as on behalf of the sources. For both of these cases you can use ZyALERT. In the first case, a filtering program assists users in finding relevant information. Users specify their information needs and define their profiles.

In the second case, filters can be used by sources to "target" information to potentially interested users. The source presents some descriptions of the information to the filter, and the filter forwards to the

individual users a subset of the items it selected based on advance knowledge stored as users' profiles or queries.

In both cases users can have the option of providing the filter with feedback indicating the extent to which the selection met their current information needs. The feedback may be provided explicitly, through a feedback possibility towards the system administrator, or implicitly, by skipping over unwanted items. Especially after the installation of ZyALERT it is important that users provide the system administrator with feedback about the accuracy of the user profiles.

Features of filtering

The term filtering is used for a variety of processes involving the delivery of information to people who need it.

An information filtering system is an information system designed for unstructured or semi-structured data. This means that you can use ZyALERT to filter most incoming information, not restricted by questions regarding format or style.

Information filtering deals primarily with textual information. ZyALERT searches the incoming text documents to see if they match with particular queries. However, it can also handle other types of data such as images and video that are part of multimedia information systems.

Filtering systems can easily deal with large amounts of data. ZyALERT is only limited by the storage capacity of your system. Filtering applications typically involve flows of incoming data, either being broadcast by remote sources like newswire services, or sent directly by local sources like mail.

Filtering is based on descriptions of individual or group information preferences called profiles. Usually the system administrator will define the profiles and distribute them among users. As a result a user will only receive information that is of interest to him or that he should be aware of.

Filtering is meant to imply the removal of data from an incoming flow, rather than finding data in that flow. Users therefore see what is left after obsolete data is removed, whereas in text retrieval systems they see the data that is extracted. The system administrator can e.g. specify the removal of incoming "junk" electronic mail or faxes. Note that this means that profiles may not only express what people want, but also what they do not want.

Notes concerning Profiles

Information filtering begins with users, who have relatively stable, long-term goals. Additionally, you can define profiles that display short-term goals. The description of what information is of interest and needs to be retrieved is called the user profile.

Groups as well as individuals have to be kept informed about certain topics. Such information interests lead users to engage in relatively passive forms of information-seeking behavior, such as having texts brought to their attention. In ZyALERT this is accomplished by representation of the information interests as profiles, in other words queries, which can be put to the filtering system.

To ensure delivery of proper information to the users, it is important that the system administrator has a good overview of what information is needed, and which users have to be kept informed about what topics. Profiles must reflect the current information interests and needs. Acquiring accurate descriptions of information needs is essential in a retrieval system, and also in a filtering system.

The system administrator who is responsible for defining profiles should discuss information needs with the users before defining the profiles. It is important to realize that some words can have more than one meaning (e.g., the word bank) and that the same concept can be described by various words. The goal is to develop a query that filters the information that a user wants, represents his interests without a lot of overhead, and does not leave important information out.

As you are becoming more acquainted with all aspects of ZyALERT, you will get insight in what can be seen as a good query and what query will deliver unimportant or even wrong feedback. The only way this can be accomplished is by setting up an extensive discussion with end users, thus ensuring that the system administrator is kept informed about the value of the retrieved and distributed information and can change profiles and flows if necessary.

Questions regarding Security

The ability to personalize the delivery of information depends on the availability of personal information about the users and their needs and wants. Since a significant portion of the users may be concerned with privacy questions, protection of privacy was an important consideration during the development of ZyALERT.
We can distinguish three levels of privacy concerns: protection of user profiles and queries, protection of usage history and protection of the actual information if the delivery takes place over networks. The third concern may be shared by the information sources as well, since it is in the best interest of information providers that the information is delivered exclusively to users who are legal subscribers. These privacy concerns may also be addressed by the introduction of various levels of encryption on the communication lines.

Access rights are controlled by the constraints of the network that you are using. If you are a network administrator and you are installing ZyALERT on a network, keep in mind that all users who have read and write access to this directory can use ZyALERT to make changes to profiles and flows. We recommend that you install ZyALERT in a directory where all users rights are limited to read-only, to avoid users making changes.
If privacy concerns have a high priority you can also decide to install ZyALERT Index Server and Set-up in a directory where only the system administrator has access. This means that no one will be able to change or even view the contents of the Set-up and the Index Server except the system administrator.

The Process of Filtering

Incoming data, such as faxes, news lines, mail, etc. must be brought to the users' attention. To accomplish this, texts are filtered and then distributed among users (being retrieved). These texts are read (or not) and are evaluated in terms of how well they respond to the information needs and interests. The evaluation may lead to modification of the profiles and information interests. The modified profiles are used in subsequent comparison processes.
Information filters must examine information items or some description of them before it can be decided whether they are relevant for any given user. The success of a filtering program such as ZyALERT is very strongly affected by the types of descriptions of the information that is available. Since, in general, administrators are not and cannot be familiar with all incoming information items that are being filtered;

you will have to develop queries that are "broad" enough to handle all types of incoming information and "narrow" enough to give users exactly the information that they search for.

In ZyALERT each profile is a query. As soon as you connect a profile to a flow, all incoming data is compared with the query that is specified in the profile. After comparison, ZyALERT will decide whether or not this information is relevant and distribute it to users. At this point the program uses the retrieval techniques of ZyINDEX.
You can find extensive information regarding text retrieval and the definition of queries in the Standard User Manual.

Automatic notification of search query results with ZyALERT

ZyALERT and ZyWEBSERVER are integrated closely. You can now send out an Alert message, which is linked to files in the ZyLAB Webserver.

When applied in the business environment, ZyALERT offers many advantages for applications such as personnel recruiting, business intelligence, media clipping services, and many other applications where timely and automatic notification of important documents results in higher productivity.

ZyALERT is easy to set up and administer.   Any number of "ALERTS" can be set up to apply predefined queries that monitor selected indexes (document collections) at specified intervals. The system can be set to automatically deliver a notification (ZyRESULTS) or it can be set to e-mail the entire document to the user. It can even be set to output results from various ALERTs to different disk directories from where other external processes may be applied.

ZyALERT uses e-mail for routing and delivery and doesn't require the recipient to have any special viewing software. It is an excellent tool for filtering unstructured correspondence in order to generate input for a structured ERP or Workflow system. Since it can sort documents based on content, the most appropriate form of output can be applied for the specific document type, leveraging the value of your corporate intranet, e-mail or a ZyLAB Web Server.
A common application is for filtering customer correspondence and sorting it by categories like "complaints", "product information requests", "credit applications", or any other category that can be identified by content analysis. Once sorted, a variety of dissemination tools can be used to deliver timely information by the most effective method.

By automating the delivery of relevant information (Push technology), ZyALERT significantly increases the use of electronic information beyond what is typically possible with Pull technology. Users don't have to remember to routinely search the system every day in order to find important information. Instead, they simply check their e-mail.

Since version 5.0 it is possible to change your alerts via the ZyLAB webserver. So in case your interests are changing you have the possibility to change the search query online. A link on the bottom of the result list that is sent to you directs you to the subscription pages.

Scenarios with ZyALERT

There are many methods of using ZyALERT, depending on your company and what, where, when and how you want the information to be filtered. Some example scenarios are listed below:

- Mr. Blob is an insurance consultant, you are interested in everything he is reporting; the incoming data is filtered, and the Alert is for all files relating to Mr. Blob. The found data is distributed and the data is left in the same condition.

  The data can also be sent to more than one directory if for example you wish to share Mr. Blob's information with your accounting department.
- Mr. Stork owns a hotel. He wants a list of all the guests in his hotel filtered to him daily, but guest list that are 24 hours old he would like deleted so as not to confuse himself or his staff. He will use the function Clean-up so that these files will automatically be deleted after 24 hours.
- Data is coming into small data repository, Alerts on data, if a file is found, data is moved to archive depository. Catch Alerts is used to distribute data that is not distributed based on Full Text Retrieval. After distribute, all data is moved to an archive. Data can be distributed from the first repository only once. Alerts running on Archive can be sent to more then one user.
- Mr. Roy and Mr. Krazt are owners of a shoe business. They want all information filtered which is related to Mr. Dunn, who is there wholesaler. Mr. Right wants to receive information only related to 'New Orders' and Mr. Left wants to receive information about 'delivery dates'. This is possible by using the Catch-alerts function again and this time have the files distributed to different directories.

The data is arriving into a small repository, Alerts on data, if the files are found; data is moved to different directories. This is known as a topic analyzer.

Preparations

Before you start working with ZyALERT, it is advised to create a ZyALERT Web Client, add the Logged On user to the Administrator group and define some options. Once these steps are completed, you can start creating Alerts.

ZyINDEX/Web Client: Create a ZyALERT Web Client

Conditions

ZyINDEX is open.

Instructions

1. Select the Web Client icon: .
2. Go to File > New.
3. Enter a Long client name.
4. Enter a HTTP alias.
   This alias will be used to access the Web Client via a web browser.
5. Enter an existing Client Email Address, to be used as senders account for the email distribution.
6. Click OK.
7. Select Indexes.
8. Click Select.
9. Select an index.
10. Click OK.

Result

You created a Web Client that is ready to be used in combination with ZyALERT.

ZyINDEX/Security: Add Logged On User to Administrator group

Conditions

ZyINDEX is open.

Instructions

1. Select the Security icon: ![Security] .
2. Click Users.
3. Click Import Users.
4. Select a Source (Windows NT) from the dropdown listbox.
5. Select a Domain from the dropdown listbox.
6. Select the Logged On user.
7. Click Import.
8. Click Groups > Available Groups.
9. Select the ZyLAB_Administrators group.
10. Click Select users to be members of this group.
11. Select the Logged On user.
12. Click OK.
13. Click Users > Available Users.
14. Select the Logged On user.
15. Click Edit user fields.
16. Enter the Logged On users email address (to sent the Alert to), and other relevant information.
17. Click OK.

Result

You added the Logged On user to the Administrator group, and defined the User fields (especially the email address). ZyINDEX/Security is ready to be used in combination with ZyALERT.

ZyALERT: Important Options

Conditions

A ZyALERT Web Client is created, and the Logged On user is added to the Administrator group in ZyINDEX. Now, before you can add Alerts, some options have to be defined in ZyALERT.

Instructions

1. Open ZyALERT.
2. Click the Options button, at the bottom of the dialog.
3. Make sure the Indexing Options tab is selected.
4. Deselect the option 'Enable index-synchronization'.

> **Important**: If selected, this option will trigger a Build action at the moment the Alert is executed based on the schedule. When ZyTIMER/ZyTIMERService is maintaining the indexes, enabling this option will cause conflicts!

5. Select the Webserver Integration tab.
6. Enter your computer name in the field Default Hostname.

> This computer is running the Internet Service Manager containing the web client, you created in ZyINDEX > Web Client.

7. Click OK.

Result

Some important options, necessary for the proper functioning of Alerts, are defined. For more information about the other options, see **Options** (page **33**).

Add, Edit or Delete a New Alert

(profile)

ZyALERT will guide you through an Alert Wizard. For each participating user a profile (Alert) is created.

Conditions

- One or more indexes are created with ZyINDEX.
  These indexes are maintained with ZyTIMERService.
- You are logged on as a Domain user, and you are a member of the Local Administrator group.
- In ZyINDEX/Security/User Identities, the email address of all participating users must be filled in (the Alert will be sent to that address). Also, all other relevant (user) information is defined here.
- If you want to generate HTML email messages, you have created a Web Client.
  SMPT Mail protocol is active.

Instructions

1. Open ZyALERT.
2. Click New Alert.
3. Click Users.
   The User dialog appears.
4. Select a user.
   If no users are available, click Add. For more information, see **Add, Edit and Delete Users** (page **13**).
5. Click Select.
6. Click Next.
   The Index dialog appears.
7. Click Indexes.
8. Select an index.
   If no indexes are available, click Add. For more information, see **Add or Delete Indexes** (page **15**).
9. Click Select.
10. Click Next.
    The Query dialog appears.
11. Define the query you want to execute at specific intervals.
    You can use all ZyFIND advanced search methods, like Fields or Concepts.
    Click Test (replaces the Search button), to test if the query has any results.

> If you want to execute a (full-text or field value) search query, looking for files with the current date (or a few days more or less), use the macro *@@today*. For more information, see **ZyALERT macro: @@today** (page **24**)

12. Click Next.
    The Distribution dialog appears.

13. If you want to sent an email to the user, select the option E-mail.
    Alternatively, you can choose Disk, Printer, or Database as the Distribution method.

14. Select E-mail Distribution Settings.
    (Or, if you choose another Distribution method, **Disk** (page **18**) or **Print Distribution Settings** (page **19**))

15. If you want to sent a result list (resulting from the query defined earlier) to the user, select that option.
    For the other options, see **E-mail Distribution Settings** (page **17**).

16. Select a format from the dropdown listbox.
    For more information, see **E-mail Distribution Settings** (page **17**).

17. Click OK.

18. Click Advanced.

19. If you are using a Field query, do not sort on Hit density!
    For more information on the Advanced Distribution Settings, see **Advanced** (page **21**).

20. Click OK.

21. Click Next.
    The Options dialog appears.

22. If you want this user to be able to change his Alert settings via the Web Interface, select the option Private.

> With this option enabled, the user gets a reference at the bottom of his HMTL email that states that he can edit his subscriptions. If the Alert contains a user group, it is not wise to select this option: Everybody from that group will be able to change the subscription.

23. Click Next.
    The Schedule dialog appears.

24. Define the Alert frequency in minute(s), hour(s), day(s), or week(s).
    In most cases a daily alert will be most appropriate.

25. Define the Alert Period Boundaries. By default the start and end time are set on a daily interval. The start and end time limit your search query as a time frame. When you want to search all available documents in the index without any time frame, you have to put the end time in front of the start time.

26. Click Finish.

Result

You added a new Alert.

Note

- **Delete Alert**: With the delete button you can remove a profile, when a user is no longer interested in receiving information. Note this action only deletes the profile from the ZyALERT main window.

- **Edit Alert**: In the Edit Alert dialog the user has the option to Edit Current User; Add and Select a New User; or list all Users in the ZyALERT program.

  - *Edit Current User*: From the main window of ZyALERT, highlight the profile you would like to edit. Select the Edit Alert button. If this is the profile you wish to change, then select the tab where you want to change something (user, index, query, distribution, options and schedule). If you edit an alert ZyALERT has to be stopped. After editing ZyALERT can be started again.

  - Add and Select: This button is used to add new profiles to the ZyALERT program and follows the same procedure as New Alert in the main window.

  - Users: List all of the Users in the ZyALERT database. In this screen the User can choose from five buttons and update the database where appropriate.

  - To reinstate a deleted profile: If the Delete Alert button is accidentally used on the main screen, then highlight any profile and use the New Alert button. On this screen select Users button, highlight the User that was deleted. Use the Select button to reinstate the profile again.

Add, Edit or Delete Users

Conditions

ZyALERT is open.

Instructions

1. Click the Users button.

2. Click Add.

3. In the field Name, enter the user name.

4. Depending on whether the logged on user is Domain user and member of the Local Administrator group (for more information, see **Add Logged on User to Administrator Group** (page **8**)), you have the following options:

    ◆ If you are the logged on Domain user, the Account field and other defining fields like Company, Department, etc. are disabled. Since ZyALERT and ZyINDEX/Security are linked with each other, you only need to click Select, and select the correct (imported) user. Click OK. The ZyLAB User Id field is filled automatically, as are the other fields which are defined in ZyINDEX > Security > User Identities.

    ◆ If you are **not** the logged on Domain user, and want to keep track of the number of matches and sent files per user, specify in the field Account an identifying number for every user. Define the other available fields. If the user wants to receive the results via email, fill out the E-mail address. This feature only works in combination with MAPI related programs, and the ZyALERT Distribution Server with e-mail. If the user wants to receive the results via fax, fill out the fax number. If the user wants to receive the results on his hard disk, fill out the Distribution Directory.

5. If the new user, does not have Administrator Rights, deselect that option.

> The first user always has to be an administrator to be able to get access to the ZyALERT tables.

6. You may want to adjust the E-mail maximum size.

7. Browse for the Default Distribution Directory.

8. Enter the correct Web Client name in the field Default Web Client. For more information about the proper Web Client settings, see **Create a ZyALERT Web Client** (page **7**).

9. Click OK.
   The user is saved.

10. Click Close.
    The ZyALERT User database is saved.

Result

You added a user to the ZyALERT User database.

Note

- To edit a user, select one, and click Edit. Make the necessary adjustments, and click OK. To save the user in the ZyALERT User database, click Close.
- To delete a user, select one, and click Delete. Click Close.

Add or Delete Indexes

Conditions

ZyALERT is open.

Instructions

1. Select the Indexes button.
   The Indexes dialog appears.

2. Select Add.

3. Select an index.

4. Click OK.
   The index is added to the ZyALERT Indexes database.

5. Click Close.
   The index is saved in the ZyALERT Indexes database.

Result

You added an index to the ZyALERT Indexes database.

Note

- To delete an index, select it, and click Delete.

Distribution

In the Distribution dialog of the ZyALERT Wizard, you can select a method for data distribution. You can choose from:

- E-mail
- Disk
- Printer
- Database

Select the appropriate option, and define the settings.

Click the Advanced button, to define the Advanced Distributions Options (Distribution, Distributed Files, and Quality Control).

Email Distribution Settings

Conditions

You selected E-mail as the distribution method.

Instructions

1. Select the E-mail Distribution Settings button.

2. If you want to sent a result list to the user, select the option Result list. Select one of the following formats:

    *   ZyLAB format

    *   ASCII (unformatted)

    *   HTML with links to ZyLAB Webserver

    *   HTML attachments with links to ZyLAB Webserver

    *   HTML - no links

    *   HTML attachment - no links

    The choice will depend on the information being filtered, and the users security structure. The HTML options mean that you will be using SMTP as your mail protocol. The host name and web client name are automatically entered, based on the previously defined variables.

    Note: If you selected HTML (attachments) with links, and do not want users to adjust their subscriptions, select the option "Suppress links to subscription pages".

3. Select the format in which the contents should be delivered, via the Contents dropdown listbox.

    If you selected "HTML with links to ZyLAB Webserver", or "HTML - no links", Contents cannot be defined (since only links are sent to the user, and no contents).

4. If you want users to receive one message for each retrieved item, select that option.

5. Click OK.

Result

You defined the Email Distribution Settings.

Disk Distribution Settings

The distribution to disk can be done in separate folders for tiff and text files. In the earlier versions the documents will be exported into the same folder. Now an index can be immediately made over the different data folders without first copying the documents over to a text and tiff folder.

Disk distribution to a specific index

This feature allows you to move results from one index to another and at the same time send an email to the users with a link to the new results from the new index.

Conditions

You selected Disk as the distribution method.

Instructions

1. Select the Disk Distribution Settings button.
   The Export Settings dialog appears.

2. If you want to sent a result list to the user, select the option Result list. Select one of the following formats:
   - ZyLAB format
   - ASCII (unformatted)
   - HTML with links to ZyLAB Webserver
   - HTML - no links

3. Select Contents to select the Contents Export Settings.

4. Select the format in which the contents should be delivered, via
   - Standard > select a format from the dropdown listbox.
   - Advanced > Settings.
     A second Export Settings dialog appears. For more information about this dialog, see ZyFIND > Working with documents > Share > Export document(s).

5. If you selected a Standard format, click OK.

6. If you defined the Advanced settings, depending on those settings, you can:
   - Change the export destination every day/week/month/quarter or year.
   - Sent the resultlist as html with links to export index
   - Include an HTML page as attachment

Result

You defined the Disk Distribution Settings.

Print Distribution Settings

Conditions

You selected Print as the distribution method.

Instructions

1. Select the Print Distribution Settings button.
   The Print Job Configuration dialog appears.
2. Define the Printer, Job Settings, and Document Settings.
   For more information, see   ZyFIND > Working with documents > Share > Print > Print Document(s).
3. Click OK.

Result

You defined the Print Distribution Settings.

Database

All information about the alerts (ID, user, schedule, selected indexes, QC, etc.) and their distribution can be stored in a database. This can be very handy because you can report who received what kind of information and maybe more important how much information (think of the advantages for, for example, clipping agencies). This Fox Pro database can also be opened in another database format like Microsoft Excel.

The tables can be found in Program files > ZyLAB > Information Management Platform > ZyALERT > DistributionDatabase, here you see the QC, the indexes, the Alerts, the AlertID.

Advanced

The Advanced Distribution Options allow you to specify the distribution in more detail.

Distribution

- Results may be sorted on
    - Hit density (descending)
    - Number of Hits (descending)
    - Date/Time (ascending)
    - Filename (ascending)
    - Pathname (ascending)
    - Comment (ascending)
- Define the Minimum Hit Density (Hit Density is the relative density of hits in a file).
- Define the Maximum Number of Documents you want to sent.
- If you do not want to distribute if no hits are found, select that option.

Distributed files

- Define what you want to do with the distributed files:
    - Keep files after distribution;
    - Delete files after distribution; or
      It is advised to keep the option "Update index automatically after file move or delete" selected.
    - Move files after distribution.
      Browse for a location.
      Define the Maximum number of files per directory.
      It is advised to keep the option "Update index automatically after file move or delete" selected.

Quality Control

- If you want to check the standard of the filtered information being distributed, select Quality Control before Distribution.
- Browse for a directory where you want to store the result lists that have to wait for the QC. The folders that you specify here, will be listed in the QC activity on the main ZyALERT screen. It is possible to store

this on the network so this list is editable by different users on different workstations (in case they have ZyALERT installed).

- If you start the Alerts, you will see that they will be monitored, updated and queried. The Alerts will not be distributed but a new Alert will be made. This Alert will be of the Quality Control-type. It will be distributed **after** acceptation of the result list.
- If you are working with only one ZyALERT station. the QC can only be done after you stopped the ZyALERT process. This is also necessary for everything you edit in an Alert.

To review the results of an Alert, before distribution, select Quality Control in the ZyALERT Main Window. For more information, see **Quality Control** (page).

Schedule

You can determine how often information needs to be checked for changes (varying from once per minute to once in over a year). The first time a data flow is compared with a user profile, the whole flow is checked. After that only the files that changed since the last comparison are filtered and distributed.

ZyALERT macro: @@today

If you want to execute a (full-text or field value) search query, looking for files with the current date (or a few days more or less), use the macro *@@today*.

UTC is used to determine the current date. The macro is case-insensitive, and the same for all languages.

Macro used in search query	Explanation
@@today	Search is executed for the current date (yyyymmdd). For example: 20050920.
@@today(+5)	Search is executed for the current date, plus 5 more days. For example, 20050920 to 20050925.
@@today(-5)	Search is executed for the current date, plus 5 days less. For example, 20050920 to 20050915.

Process Alerts...

...Manually

Conditions

Alerts are added to the list.

Instructions

1. Select an Alert.
2. Click Start.
3. Read the warning carefully:

   You have selected not to automatically synchronize the index contents.
   Please be aware that in this case, you should not start the ZyALERT process before you have copied the new data and have rebuilt the index.
4. If you do not want to see this warning again, select the option 'Don't show this warning again'.
5. Click Continue.
6. If you want to execute ZyALERT, click 'Continue, don't reschedule'.
   - To stop processing, click Cancel.
   - To reschedule all unprocessed Alerts, click Reschedule only.
   - To reschedule all unprocessed Alerts and continue processing after that, click Reschedule and continue.

Result

ZyALERT has monitored your index.

…As a Service

Conditions

Alerts are added to the list.

Instructions

1. Select the Service button, at the bottom of the dialog.
2. Enter the Account name: domain name\user name.
3. Enter the Account password.
4. Browse for the Temporary directory.
5. Define the Process priority.
6. Click OK.

Result

You installed the ZyALERT Service. Alerts will be processed automatically.

Note

- Start/Stop the Service, via Start > Settings > Control Panel > (Administrative Tools >) Services.
- To remove the service, click the Service button again, and select Remove Service.

Subscriptions to Alerts (create / edit / delete)

To determine what kind of information will be sent to you, use the register pages from ZyALERT. These pages allow people who receive alerts to edit their alerts. The search queries can be adapted so the information sent to the users will be the information they long for at the moment. It is also possible to subscribe to new alerts and configure them via the web client.

Conditions

A Web Client is created. You are logged in as a user with an account in ZyALERT. **Attention**: Without an account in ZyALERT you cannot create new subscriptions! For more information on creating an account in ZyALERT, see the ZyALERT Manual > **Add, Edit or Delete Users** (page **13**).

Instructions

1. Open the correct Web Client.

2. Select Subscriptions from the menu.

3. To delete a subscription, click .

4. To edit a subscription, click .

5. To create a new subscription (for a specific index), select the index and click New Subscription.

6. Define the Search and Schedule options.

7. Click Update.

Result

You have created a new subscription (or edited/deleted one).

Note

The email below is based on the template "mailing" and contains not only links to the information you subscribed to, but it also contains links to the web pages "subscriptions" and "subscriptionedit". The web page "subscriptions" gives the user the possibility to maintain all subscriptions in his or her name.

From:	marc@zylab.nl			Sent: Thu 6/20/2002 2:31 PM
To:	marc@zylab.nl			
Cc:				
Subject:	ZyALERT profile: Test; user: marc; at 06/20/02 14:30:35, 1 of 1 messages			

ARCHIVE, SEARCH, FIND, ORGANISE, SHARE and REPRODUCE all your information

POWERED by ZyLAB®

The query **g*** in Index **Test** resulted in **1** hits in **1** files.
The search results page contains the files ranked **1** to **1**, sorted on **Hit density (descending)**.

Rank	Info
1	C:\PROGRAM FILES\ZYLAB\TEST\TXT\New Text Document.txt : **30000** relevance, **39** bytes, **39** hit(s), in index **ZyDOCDATABASE**.

1 - 1

Click here to edit this alert.

Click here to manage all your alerts.

Copyright © 1995-2002 ZyLAB Technologies B.V.

ZyALERT Main Window

The ZyALERT Index Server only works as long as the program is open. This means that for ZyALERT to work properly, you need to make specifications in this window and then minimize it on the desktop. As soon as you use Exit to terminate the program, no more indexing and updating of information flows and matching of profiles will take place.

It is possible to determine the actual times for updating and data comparison in such a way that the program will make optimal use of system resources. You can set ZyALERT as a **service** (page **40**).

ZyALERT keeps an *extended log file*. This file keeps track of all activities of the program (indexed data flows, number of hits per profile, etc.).

Note: ZyALERT uses the system's date and time to decide when it should start updating indexes. If for some reason, e.g., a power break, ZyALERT cannot start the update of an index at the specified time, it will automatically update the Next Indexing column with the time specified in the Interval column as soon as you restart your system. For example:

> An index on your system is scheduled to be updated at 1:00 p.m. on 02/05/99 with an interval of 24 hours. On this day you have a power break from 12:45 p.m. until 1:15 p.m. When you reboot your system ZyALERT knows that the update time has passed and will use the time set in the Interval column to set the time in the Next Indexing column to 1:00 p.m. on 03/05/99. In the Last Indexing column you will see the correct setting: 01/05/99 1:00 p.m., the time of the last update.

With ZyALERT activated the User can still use ZyINDEX > BUILD manually to update your indexes. ZyALERT only recognizes the instances where it gave the index command itself.

The functionalities New Alert, Delete Alert, Edit Alert, Users and Indexes, which can be found in the upper right corner of the main window, are explained in the following topics:
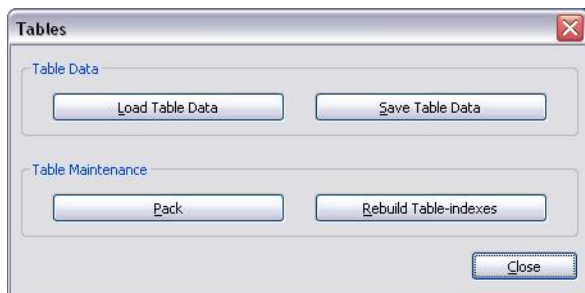
- **Add, Edit or Delete a New Alert (profile)** (page **10**)
- **Add, Edit or Delete Users** (page **13**)
- **Add or Delete Indexes** (page **15**)

All other functionalities are explained in this section.

Tables

With tables we mean the different tables from the Fox Pro databases. In these tables the following information is stored: The alerts, the selected indexes, the Quality Control, UserID and Users. When you make a lot of changes or distribute a lot of alerts, we advice to pack and rebuild the indexes on a regular bases. If you have a lot of alerts and change the tables often pack and rebuild them every two weeks.

- Load Table Data: Will load the Table with information about the Alerts, the selected indexes, the Quality Control, UserID and Users.
- Save Table Data: Will save the data.
- Pack: Will delete the deleted files in the different database. Make sure a back up is provided if using this function. The records for the database that are deleted, are the records that are already deleted in ZyALERT. By deleting users, alerts etc. from the ZyALERT window the records in the Fox Pro database are not deleted yet, but marked as 'to be deleted'. With 'Pack' the records are really deleted from the database.
- Rebuild Table-indexes: Rebuild index(es). Searching in the database becomes faster. (working with information that comes from the databases becomes faster)
- Close: The Tables dialog will be closed.

Note

- The tables of your system can be found underneath Program files > ZyLAB > Information Management Platform > ZyALERT > Tables. The tables can be opened in Fox Pro. In case you don't have Fox Pro installed, you can use Microsoft Excel to open the different tables.
  When packing your tables the warning "It is strongly recommended to make a back up of the tables before packing or reindexing. Do you wish to continue?" will pop up. The above-mentioned 'Tables' folder contains all tables, so this folder has to be backed up.
- If you are upgrading from ZyIMAGE 4.0, your old tables are detected. Click Yes to automatically upgrade. A MODE and a GUID is added to the Users.dbf tables. In the Alerts.dbf tables a MODE, HOSTNAME, Web Client and EXPORTCFG are added. All Users will be Administrators.

31

View Logfile

As soon as ZyALERT updates an index, the program creates a file to hold the names of the indexes and the date and time they were updated. If you choose this option, you will receive an overview of the updates that occurred during e.g. a month. ZyALERT will add the name of the index to the Log file whenever an index is updated.

If for some reason an index was not updated at the specified time, there will be no entry in the Log file for that index.   By checking Catch Alerts a list will be given of indexes that were not caught. By viewing the Log file you can make sure that ZyALERT works correctly.

If the log file gets too large, a scroll bar appears on the right side so you can view all contents. Of course you can always save the contents of the log file in a different place.

To delete the entire contents of the file, highlight the text and use the Delete key on the keyboard.

Options

Indexing Options

Enable index-synchronization

By checking the box to allow index-synchronization, the user will have the choice to select Update and
Optimize. This is necessary if changes are made to the indexes in ZyINDEX > BUILD. Quick build can be used
as well.

Result List Options

Result Lists

- *Delete after distribution*: After the filtered information has been sent to the relevant distribution file, there is an option to Delete after distribution. The user can filter the incoming information and delete what is irrelevant.

- *Rename to .BAK after distribution*: A search can be performed on all .BAK files for the user, making working and reviewing filtered information quicker and more efficient.

Statistics

In the Statistics tab you can enable Statistics-logging.

Database Options

In the Database Options tab the user can add customized fields to the filtered information. New *database fields* can be added. Existing fields can be removed or rearranged.

This means that one can add field values that are used as meta information on the scanned documents. These fields will be added to the distribution **Database** (page [20](#)) and can be picked up when you are making a report.

Webserver Integration

In the Webserver Integration tab the host name of the website where ZyALERT has been integrated can be displayed.

This is the ability to distribute ZyALERT messages in HTML format. The template determines the format in which ZyALERT is distributed in HTML format. The ZyALERT administrator to customize ZyALERT may edit the template.

Bannerpage Customization

The Bannerpage Customization tab allows you to customize your printed documentation with the following options:

- *Banner Bitmap*: An image can be displayed on the screen or on the printed documentation as a banner.
- *Banner Header*: Text can appear at the top of every page in the document, this can include page numbers, running heads or other information.
- *Banner Footer*: Text can appear at the bottom of every page in a document.

Distribution Options

The Distribution Options tab provides the possibility to

- Distribute directly to the user distribution directory (will only take effect after restart);
- Designation of distribution directories by interval and unit;
- Send mail by SMTP (if available, will only take effect after restart); or
  If not available, this option will not be visible.
- Remote SMTP. For remote SMTP you have to give in the name of the remote host(s) and the port number of your SMTP server (note that on the SMTP server the ZyLAB webserver has to be installed, or at least the correct registry entries and the templates you want to use in the mail messages have to present). When you use more then one SMTP host the different hosts can be given in using a comma- or semicolumn-separated list.
  In order to get this working you have to install ASP mail for ZyALERT that can be found in the add on directory underneath the program files folder. After installation you have to double click the AspEmail.reg file to register. Only after the installation the distribution options for the remote SMTP will be activated.

Service

ZyALERT can also be set as a service. If ZyALERT is set as a service the program can be ended without stopping the alert distribution.

Install / Remove

Conditions

Alerts are added to the list.

Instructions

1. Select the Service button, at the bottom of the dialog.
2. Enter the Account name: domain name\user name.
3. Enter the Account password.
4. Browse for the Temporary directory.
5. Define the Process priority.
6. Click OK.

Result

You installed the ZyALERT Service. Alerts will be processed automatically.

Note

- Start/Stop the Service, via Start > Settings > Control Panel > (Administrative Tools >) Services.
- To remove the service, click the Service button again, and select Remove Service.
- Accountname and password should correspond to a valid useraccount for the domain. The service uses "HKEY_CURRENT_USER" keys of this account.
- If the service is already installed, the "Remove" button is enabled.

Use

When ZyAlertService is running, users can add, modify or delete alerts using ZyALERT. New alerts will be taken into account every new cycle of the service. Errors are logged in the usual logfile. ZyALERT Service supports the distribution of   .zyr files via SMTP, so resultfiles can now be distributed by the ZyALERT Service.

Testing suggestions

Testing ZyAlertService is essentially the same as testing ZyAlert. Install and the service on a machine, and add alerts to the database using ZyAlert. This can be done on one and the same machine. If the service and the editing machine, the data (ZyAlert tables and indexes) should be shared through the network. Use

mapped drives for index locations. The shared data-path should be manually edited in the registry (for both machines):

HKEY_LOCAL_MACHINE

     Software

          ZyLAB

               ZyProfileServer

                    Preferences\DataDirectory

And

HKEY_LOCAL_MACHINE

     Software

          ZyLAB

               ZyProfileServer

                    Preferences\DataDirectory

> User feedback of the scheduling and rescheduling by the ZyAlertService should be visible in the editing application.

Quality Control

Quality Control allows you to monitor the information that you will be filtering through your e-mail and/or disk. It is possible that due to the search query there is some noise or a critical document in the result list that has to be removed, because it is not destined for the receiver of the alert.

Conditions

If you want to view the results of an Alert before distribution (and accept or edit the result list), the option 'Quality Control before Distribution' had to be selected during the creation of a new Alert. For more information, see **Advanced** (page **21**).

Instructions

1. Stop the ZyALERT process.
2. In the Main Window of ZyALERT, click Quality Control.
   The Quality Control Alerts dialog will appear.
3. Select a file.
4. Click Open File.
5. Check the result list.
6. Delete references to documents that shouldn't be distributed to that particular user.
7. Save the result list.
8. Close the result list.
9. Accept (or Reject) the result list.
10. Edit/accept or reject another result list.
11. Click Close.
12. Start ZyALERT again.

Result

You viewed result lists, and edited/accepted or rejected them. The results that are accepted, will be distributed.

Special Alerts

When you make a special alert for an index, this index will be removed from the Catch and Clean-up Alert list.

- Catch index: This function gives a list of all indexes that were uncaught. The indexes may be uncaught for various reasons. The indexes may be available in ZyALERT, but have not got a profile yet. (See **View Logfile** (page **32**) for description of what may have gone wrong)
  Such an alert can also be used to catch every document from the index that is not distributed yet and will put this by default on disk. (the location where to store the data on disk is in the profile of the user)
- Clean-up index: This allows you too clean-up the index, all data will be removed from the index. This function is useful for companies that are constantly changing the index, e.g. newspaper clippings, weekly magazines etc. With this Clean-up alert you have to give in a search query that will be used to remove all documents that match the search query. In the schedule tab the 'maximum document lifecycle time' can be given in. Meaning that for instance every week the alert is running and every document that matches the query will be deleted. The user will need to re-build, update and optimize the index using ZyINDEX after the clean-up is completed.
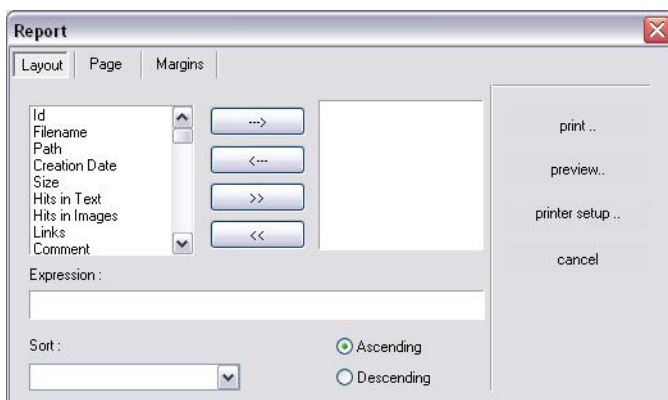
Reports

With the Reports option you can create a printed report for each client, so you can see which client id received what kind of information, how many alerts etc. The information is coming from the distribution database. This option has to be selected during the setup of an alert (last option in the distribution tab).

Select the layout, page and margin style from the Report dialog. Change print set up if required, and preview the report before clicking on the print options. The report itself can't be exported into another database. This report functionality is only meant for printing.

If you want to store information from this distribution database into another database format (Microsoft Excel for instance) right click the .DBF file and 'open with' Excel. Make a selection which fields you want to print because all information won't fit on one page. After printing you will be asked if the distribution database has to be emptied. If you click 'ok' all printed information will be deleted from the database, so next time you print a report all the old information will not be there.

The custom fields that can be added in the Database options tab that can be found underneath the 'Options' button in the main screen of ZyALERT will show up in the above list and therefore can be added to the report. The values of these fields are the same as the ones given in during scanning.
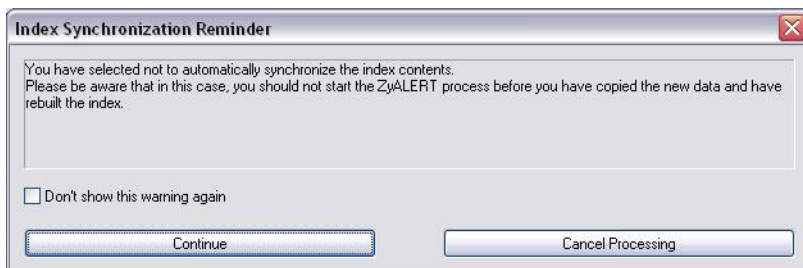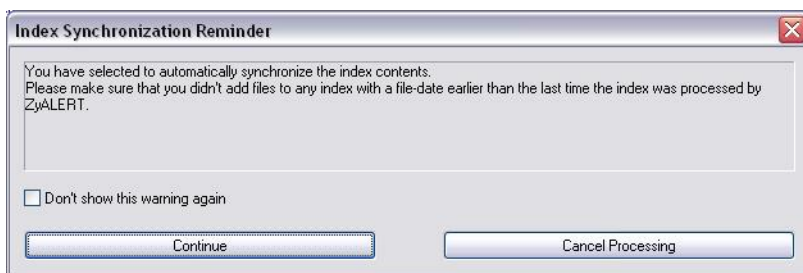
Start

When the program is executed, Start is on, meaning activities of ZyALERT Index Server continue as long as this button is activated and the program is not terminated. If you would like to halt the program's activities, but not exit it, press the Stop button and the Server will stop all activities. As soon as you press Start again, it will continue waiting for commands automatically fired by ZyALERT on the scheduled interval time.

Note the message at the bottom of the screen. This notifies you of the current state of ZyALERT. If you e.g. see the message *Waiting*, this means that ZyALERT is not adding documents or updating any indexes at the moment, but is awaiting the start of the next session.

When you select Start, the below message appears if Index Synchronization is **not** enabled. If Index Synchronization is enabled, then the next message box appears.

You have the opportunity to continue with the filtering or cancel the processing and make any changes required.

Prescheduled Alerts

Decide carefully the choices below.

- *Reschedule and continue:* The filtered registry will be updated and the process of filtering will begin.
- If you select the *Continue, don't reschedule* button then previous alerts will not be filtered.
- *Reschedule only* will update the filter registry but will not begin the process of filtering till you Select the Start button. Then the Index Synchronization message appears again, informing the User that the Index Synchronization is either enabled or disabled.

ZyALERT Main event list box and flow information

The large list box gives you an overview of ZyALERT activities. The size of the columns is adjustable. If you move the mouse to the title bar of the list box, you can move the separation lines and adjust the width of the columns. If you move the separation line of a column to the right, you enlarge the size of this column. All other columns are then automatically moved to the right. If you move the separation line of a column to the left, you will notice that this reduces the width of the column directly to the left of this column.

The list box in ZyALERT main window shows the following columns:

ID	Is an automatic number given by ZyALERT to the profile.
Alert Type	Maintenance: This is ZyALERT's maintenance profile. Retrieval is User's profile.
Status	Shows the status of ZyALERT's filtering, Pending is waiting for the Start button to be activated. Waiting is waiting for the interval to filter.
User	Displays the user name.
Schedule	Displays the time and date for next update.
Index	Shows the index that the user has chosen.
Query	The name of the flow against which the profile is being compared.
From	The last time a flow was updated.
To	Starting date & time selected in the Schedule Screen.
Interval	Frequency with which a flow is updated.
Distribution File	Distribution file and location.

Flow Information

The flow information shows you the progress where ZyALERT is busy with. Monitoring, Updating data, Querying data, Distributing data, Archiving data, Data clean up.

Exit ZyALERT

The ZyALERT Index Server only works as long as the program is open. This means that for ZyALERT to work properly, you need to make specifications in this window and then minimize it on the desktop. As soon as you use Exit to terminate the program, no more indexing and updating of information flows and matching of profiles will take place.

To end your session with ZyALERT, choose Exit from the ZyALERT menu or terminate by double clicking the system menu icon. Control returns to the Windows Program Manager. Exit is available at all times.

When you terminate a ZyALERT session, all current settings are automatically stored in the program files. The next time you start ZyALERT Index Server, the program loads your settings and will display the window the way it was when you exited the program last time.

Don't show again: Are you sure you want to quit?

Like within all other ZyLAB Applications, after closing the ZyALERT application a window will pop up, with the question: Are you sure you want to quit? It is now possible to check a mark to "Don't show again" this pop up. To re-enable the question, reset the string value for a specific user HKEY_CURRENT_USER\Software\ZyLAB\Global Settings\Suppress Exit Confirmation to 0.