

Getting started with SharePoint Alerts

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<http://www.ciaops.com>



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Introduction

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Format

Words that are displayed with an underline can be found at the glossary at the end of the document.

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Advertisement

The Windows SharePoint Operations Guide (<http://www.wssops.com>) will help the IT Professional install, configure and maintain Windows SharePoint in a variety of environments. Since the product is subscription based you always get access to the latest SharePoint information in a clear and concise manner. For the price of a few hours of work you can have access to an ever growing library of SharePoint knowledge. It will not only save you time and money but help you generate more revenue by teaching you about the fastest growing Microsoft technology. Sign up today and start reaping the benefits.

Summary

SharePoint provides the ability to notify you automatically via email when changes are made to most areas within a SharePoint site. You are able to configure the types and frequency of these notifications to suite your requirements.

This document will cover the following topics:

1. How to configure an alert.
2. How to configure the frequency and details of alerts.
3. How to manage alerts.

A video presentation of this documentation can be found at

<http://www.youtube.com/watch?v=jNiDlfqAE9s>

which is part of the YouTube channel

<http://www.youtube.com/user/directorciaops>

that contains many more SharePoint how videos.

Setting alerts in Document Libraries

The screenshot shows a SharePoint 'Shared Documents' library. The 'Actions' menu is open, highlighting the 'Alert Me' option. Two callout boxes provide instructions: '1. Click Actions' points to the menu, and '2. Then click Alert Me' points to the highlighted option. The library contains several folders and files, with columns for Name, Modified, Modified By, and Approval Status.

Type	Name	Modified	Modified By	Approval Status
Folder	Blank	6/2009 2:02 PM	Robert Crane	Approved
Folder	Clients	6/2009 2:03 PM	Robert Crane	Approved
Folder	GIS - PDF Maps	6/2009 8:11 AM	CIAOPS Testing	Pending
Folder	Group Project	6/2009 2:14 PM	Robert Crane	Approved
Folder	Personal	6/2009 2:06 PM	Robert Crane	Approved
Folder	Professional Services	6/2009 2:08 PM	Robert Crane	Approved
Folder	Project management	6/2009 2:33 PM	Robert Crane	Approved
Folder	Reference Materials	11/06/2009 2:17 PM	Robert Crane	Approved
Folder	Research	11/06/2009 2:11 PM	Robert Crane	Approved
Folder	Student Semester	11/06/2009 2:25 PM	Robert Crane	Approved
File	AcidJazz - Computer Information Agency	24/06/2009 1:59 PM	Robert Crane	Approved

Navigate to the Document Library in which you wish to create a notification. From the menu across the top of the library select **Actions** and then **Alert Me** from the drop menu that appears.

Note, that the menu items displayed here maybe different depending on your level of access.


Demonstration > Shared Documents > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

<p>Alert Title</p> <p>Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.</p>	<input type="text" value="Shared Documents"/>
<p>Send Alerts To</p> <p>You can enter user names or e-mail addresses. Separate them with semicolons.</p>	<p>Users:</p> <input type="text" value="Robert Crane"/> 
<p>Change Type</p> <p>Specify the type of changes that you want to be alerted to.</p>	<p>Only send me alerts when:</p> <p><input checked="" type="radio"/> All changes</p> <p><input type="radio"/> New items are added</p> <p><input type="radio"/> Existing items are modified</p> <p><input type="radio"/> Items are deleted</p> <p><input type="radio"/> Web discussion updates</p>

The screen should now display a window that allows you to configure the settings for a *New Alert* like shown above.

You can give this *New Alert* any description you want in the *Alert Title* area at the top of the page. It is recommended that you use a title that is descriptive enough to let you know the location of the alert in case changes need to be made in the future.



In the *Send Alerts To* area you should see your name. If you have the security rights you are able to add any additional site users to this alert so that they will also receive automatic email notifications.

In the *Change Type* area you can now select when you will receive alerts. The available options are:

- *All changes*: When any change in the Document Library occurs you will you receive a notification. This includes when files are added to the library, changed or deleted. Selecting this option will ensure that you receive the maximum possible number of notifications about changes to this Document Library.

- *New items added:* Selecting this option will mean that you will only receive notification when a file is uploaded to this Document Library.
- *Existing items are modified:* Selecting this option will result in you only receiving notification when something in the Document Library is changed. This may mean a new version of the document, a change to the existing document or even a change in the description of the document.
- *Items are deleted:* Selecting this option will result in you only receiving notification when something in the Document Library removed. Thus when a document in the library is removed you will receive an email notification informing you of that fact.

When you have selected the options you desire scroll down the screen to view the remaining options.

<p>Send Alerts To</p> <p>You can enter user names or e-mail addresses. Separate them with semicolons.</p>	<p>Users:</p> <p><input type="text" value="Robert Crane"/></p> <p> </p>
<p>Change Type</p> <p>Specify the type of changes that you want to be alerted to.</p>	<p>Only send me alerts when:</p> <p><input checked="" type="radio"/> All changes</p> <p><input type="radio"/> New items are added</p> <p><input type="radio"/> Existing items are modified</p> <p><input type="radio"/> Items are deleted</p> <p><input type="radio"/> Web discussion updates</p>
<p>Send Alerts for These Changes</p> <p>Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</p>	<p>Send me an alert when:</p> <p><input checked="" type="radio"/> Anything changes</p> <p><input type="radio"/> Someone else changes a document</p> <p><input type="radio"/> Someone else changes a document created by me</p> <p><input type="radio"/> Someone else changes a document last modified by me</p>
<p>When to Send Alerts</p> <p>Specify how frequently you want to be alerted.</p>	<p><input checked="" type="radio"/> Send e-mail immediately</p> <p><input type="radio"/> Send a daily summary</p> <p><input type="radio"/> Send a weekly summary</p> <p>Time:</p> <p><input type="text" value="Monday"/> <input type="text" value="12:00 PM"/></p>
<p style="text-align: right;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	

In the *Send Alerts for These Changes* you can provide a filter for which changes you wish to receive notifications for. The available options are:

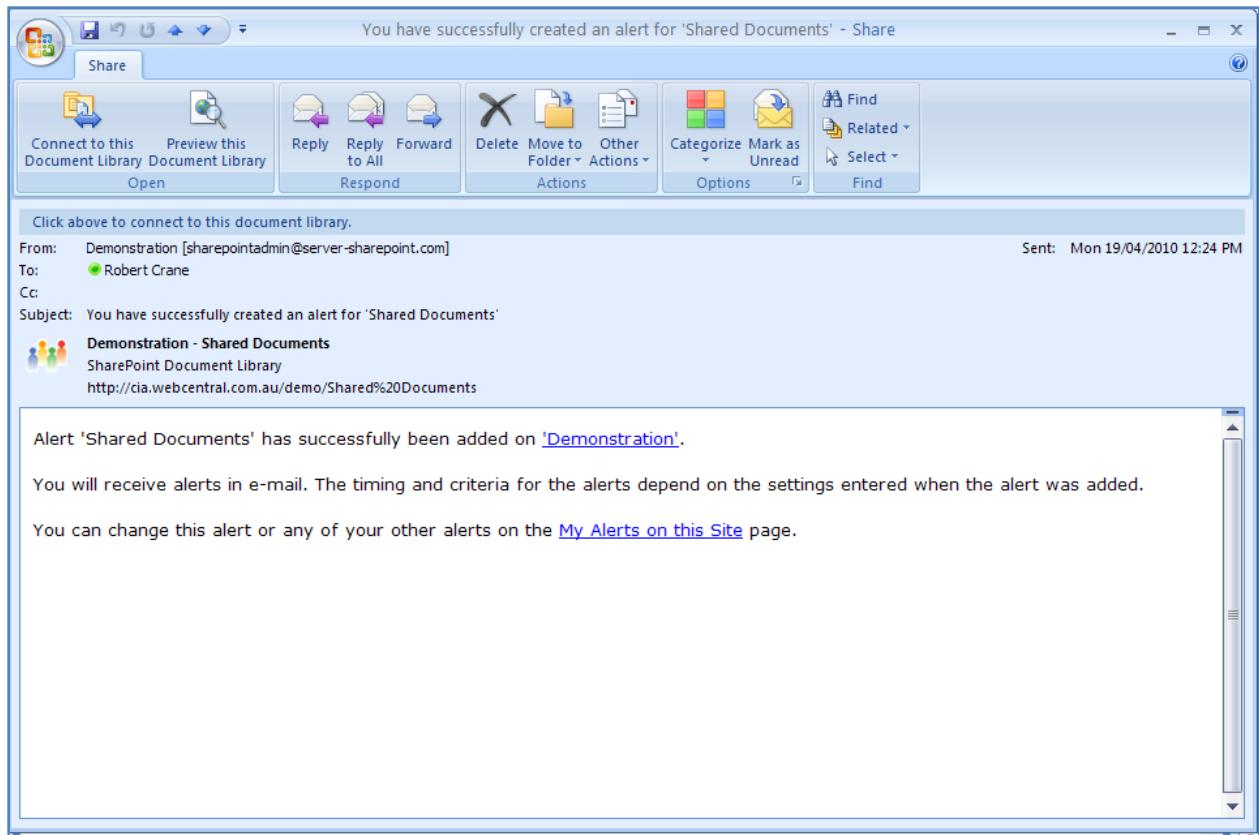
- *Anything changes*: This basically does not filter the results. It means that you will receive notifications for all the changes you selected in the *Change Type* area above.
- *Someone else changes a document*: In most cases you do not wish to receive notification that you have changed a document. Unless you select this option you will receive notification when any changes occur to a document in the Document Library, including those made by yourself.

- *Someone else changes a document created by me:* This allows you to only receive notifications for only changes on documents you created. Changes made to any other documents not created by you in the Document Library will not provide notification.
- *Someone else changes a document last modified by me:* In this case you receive notification when someone changes a document of which you were the last to modify. When you change a document and save it back to the Document Library you automatically become the last person to modify that document. This filter allows you to track only those documents that someone has changed after you have been recently working on.

The final configuration option *When to Send Alerts* allows you to determine the frequency of receiving alerts. The options available are:

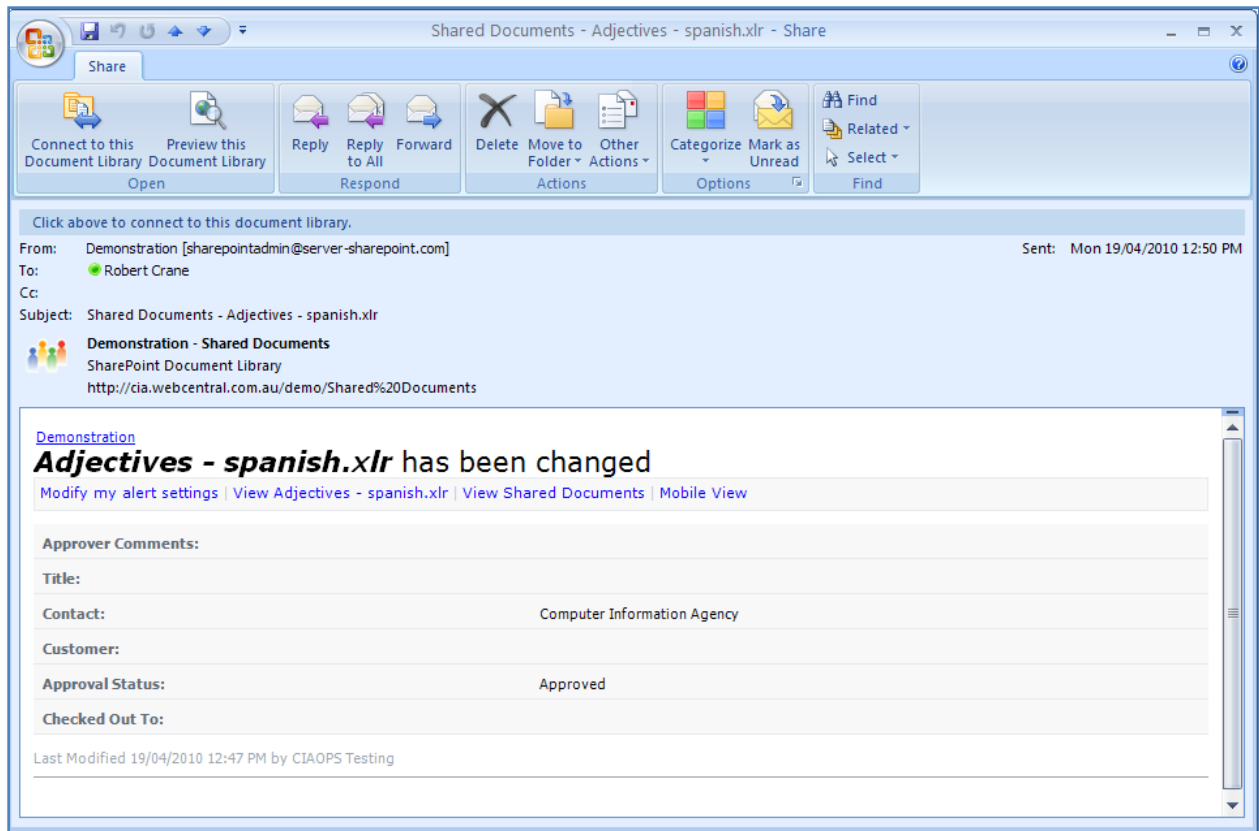
- *Send email immediately:* As soon as a change matching the options you have set above occurs an email notification will be triggered. If you are working with a Document Library that experiences a lot of change you should be careful about using this option as it will potentially generate a lot of emails.
- *Send a daily summary:* At the time that you nominate you will receive a single email with the details of the notifications you have requested to see. When you select this option the time setting at the bottom of the list will become available for you to set as required.
- *Send a weekly summary:* On the day and the time you specify you will be sent a single email with the details of the notifications you have requested to see. When you select this option the day and time settings at the bottom of the list will become available for you to set as required.

When you have completed configuring the desired option press the **OK** button to save.



Immediately upon saving your settings you should receive an email like that show above. It will confirm the configuration of the alert you have just created. You will also notice a number of hyperlinked words which can be clicked to take you that area within the SharePoint site.

If you do not receive an email like that shown above firstly check that it has not been caught in any spam filters. If you still have not received it then you will need to check you email configurations to ensure that you receive future alerts.



Now when a change is made to the Document Library that matches the criteria and the frequency you configured in your alert you should receive an email like shown above.

The email will identify the items that have changed as well as provide you with a number of links inside the email that allow you to go the location within the SharePoint site.

Managing Alerts

The screenshot shows a SharePoint interface with a dropdown menu open for the user 'Robert Crane'. The menu options are:

- My Settings**: Update your user information, regional settings, and alerts.
- Sign in as Different User**: Login with a different account.
- Sign Out**: Logout of this site.
- Personalize this Page**: Add, remove, or update Web Parts on this page.

Below the menu is a table of alerts:

Contact	Modified	Status
Robert Crane	11/06/2009 2:02 PM	Approved
Robert Crane	11/06/2009 2:03 PM	Approved
CIAOPS Testing	11/08/2009 8:11 AM	Pending
Robert Crane	11/06/2009 2:14 PM	Approved
Robert Crane	11/06/2009 2:06 PM	Approved
Robert Crane	11/06/2009 2:08 PM	Approved
Robert Crane	11/06/2009 2:33 PM	Approved
Robert Crane	11/06/2009 2:17 PM	Approved

Callout boxes indicate the steps: '1. Select Name' points to the user name in the top right, and '2. Select My Settings' points to the 'My Settings' option in the dropdown menu.

It is possible to configure notifications in just about every location in SharePoint which can make them hard to manage if changes need to be made once they have been configured.

You can view and change your alerts site wide by clicking on your name in the top right of the site. When you do this a drop down menu will appear. Select the option **My Settings** to manage your alerts.


Note that the items displayed here many vary depending on your access.

Demonstration > People and Groups > User Information

User information: Robert Crane - HOSTING\cia-admin


Close

Edit Item | Change Password | My Regional Settings | My Alerts

Account	HOSTING\cia-admin
Name	Robert Crane
E-Mail	director@ciaops.com
About Me	
Picture	
Department	
Job Title	
SIP Address	

Created at 19/11/2008 10:30 PM by HOSTING\vs305621
Last modified at 8/02/2010 3:12 PM by Robert Crane

Close



You should now see information about your login to the [SharePoint](#) site. From the menu across the top select the option **My Alerts** to manage your notification settings across the site.

Demonstration > People and Groups > User Information > My Alerts on this Site

My Alerts on this Site

Use this page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system generated task alerts, do not appear on this page. Click the name of an alert to edit its settings.

Add Alert | Delete Selected Alerts

Alert Title

Frequency: Immediate

Shared Documents

You should see a complete list of the alerts you have configured on the site.

To remove any alert simply click in the box to the left of the alert and then select *Delete Selected Alerts* from the menu.

You will also notice that the menu provides the option to create new notifications. To do this simply select the *Add Alert* option from the menu.













Demonstration > People and Groups > User Information > My Alerts on this Site > New Alert

New Alert

Use this page to select a list or library to be alerted about. Alerts are a great way to stay updated as items are added, changed, or removed. [View my existing alerts on this site.](#)

Choose a List or Document Library

Select a list or document library that you want to keep track of. You may also view the contents of a list and then track one of the individual items. After creating an alert, you'll receive e-mail notifying you of changes.

-  Knowledge Base
[View this list...](#)
-  Shared Documents
Share a document with the team by adding it to this document library. [View this list...](#)
-  Images
[View this list...](#)
-  Announcements
Use the Announcements list to post messages on the home page of your site. [View this list...](#)
-  Calendar
Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events. [View this list...](#)
-  Contacts
[View this list...](#)
-  Links
Use the Links list for links to Web pages that your team members will find interesting or useful. [View this list...](#)
-  Projects
[View this list...](#)
-  Tasks
Use the Tasks list to keep track of work that you or your team needs to complete. [View this list...](#)
-  Team Discussion
Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team. [View this list...](#)
-  Web Links
Links to web site URLs [View this list...](#)
-  Issues
[View this list...](#)

You should now see a list of the all the areas in the site in which you can configure notifications. Simply select the location you desire and press the **Next** button to continue.


Demonstration > Knowledge Base > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

<p>Alert Title</p> <p>Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.</p>	<input type="text" value="Knowledge Base"/>
<p>Send Alerts To</p> <p>You can enter user names or e-mail addresses. Separate them with semicolons.</p>	<p>Users:</p> <input type="text" value="Robert Crane"/> 
<p>Change Type</p> <p>Specify the type of changes that you want to be alerted to.</p>	<p>Only send me alerts when:</p> <p><input checked="" type="radio"/> All changes</p> <p><input type="radio"/> New items are added</p> <p><input type="radio"/> Existing items are modified</p> <p><input type="radio"/> Items are deleted</p> <p><input type="radio"/> Web discussion updates</p>

Send Alerts for These Changes



Now a screen that is very similar to the configuration listed in the previous section is displayed.

Simply configure all the settings as desired and press the **OK** button to save these. If you need assistance with the function of each option then see the previous section.

Demonstration > People and Groups > User Information > My Alerts on this Site

My Alerts on this Site

Use this page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system generated task alerts, do not appear on this page. Click the name of an alert to edit its settings.

 Add Alert |  Delete Selected Alerts

Alert Title

Frequency: Immediate

Knowledge Base

Shared Documents

When complete you should now see the newly configured alert appear in the list *My Alerts on this Site*.

Glossary

Document Library – A component of Microsoft SharePoint. This a location in which you can store a range of files much like a folder on a network server. A SharePoint Document Library however has a number of additional features such as version control and check in, check out to name just a few.

<http://sharepoint.microsoft.com>.

SharePoint – Is available from Microsoft in two versions Microsoft Office SharePoint Server (MOSS) and Windows SharePoint Services (WSS). SharePoint provides many collaboration capabilities including document versioning and approval, wikis, blogs, survey and project management via a graphical interface. SharePoint can be usually be installed on any Microsoft Windows Server. More information is available at <http://sharepoint.microsoft.com>.

Additional resources

From the CIAOPS

SharePoint Guide - <http://www.wssops.com>

- Windows SharePoint Operations Guide Linkedin Group - <http://www.linkedin.com/e/vgh/1922207/>
- Windows SharePoint Operations Guide on Facebook - <http://www.facebook.com/pages/Windows-SharePoint-Operations-Guide/167213188332>

Public SharePoint site - <http://supportweb.ciaops.net.au>

Presentations and Documents - <http://www.slideshare.net/directorcia>

Robert Crane's blog – <http://supportweb.ciaops.net.au/blog>

Videos

- <http://www.youtube.com/user/saturnalliance>
- <http://www.youtube.com/user/directorciaops>

Commercial internet SharePoint sites

www.ferrari.com

www.hawaiianair.com

<http://www.carlsberggroup.com>

SharePoint product information

Microsoft SharePoint - <http://www.microsoft.com/sharepoint/default.aspx>

SharePoint product comparisons - <http://office.microsoft.com/en-us/sharepointtechnology/FX101758691033.aspx>

Which SharePoint Technology is right for you? - <http://office.microsoft.com/en-us/sharepointtechnology/FX101758691033.aspx?ofcresset=1>

Microsoft Search Server Express - <http://www.microsoft.com/searchserver>

Microsoft SharePoint Services 3.0 Help and How to - <http://office.microsoft.com/en-gb/sharepointtechnology/FX101494691033.aspx>

Tour a Windows SharePoint Services 3.0 site - <http://office.microsoft.com/en-us/sharepointtechnology/HA102055631033.aspx>

Windows SharePoint Services 3.0 Overview - <http://technet.microsoft.com/en-us/windowsserver/sharepoint/bb684453.aspx>

Windows SharePoint Services v3.0 vs Microsoft Office SharePoint Server 2007 - http://dotnetaddict.dotnetdevelopersjournal.com/moss_vs_wss.htm

Case Studies

Ferrari Case Study -

http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?CaseStudyID=4000004987

Pfizer Boosts Efficiency by 15 Percent with Easy to Use, Shared Note-Taking Program -

http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?casestudyid=4000004505

Benefits

Five ways SharePoint can save you money -

<http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=6c9db923-139c-4d0c-8111-a6b8c9478c1b>

Top 10 Benefits of Windows SharePoint Services 3.0- <http://technet.microsoft.com/en-us/windowsserver/sharepoint/bb684456.aspx>

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. He was the co-founder of Saturn Alliance an IT systems integration business in Sydney, Australia. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars and write on a number of topics for the Computer Information Agency. Robert can be contacted via director@ciaops.com.

Company - Computer Information Agency (www.ciaops.com)

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