

Report Alerts

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Learning Outcomes

- What are Report Alerts
- Creating a Report Alerts
- Basing Report Formulas or Conditional Formatting on Report Alerts
- Creative Usage for Report Alerts

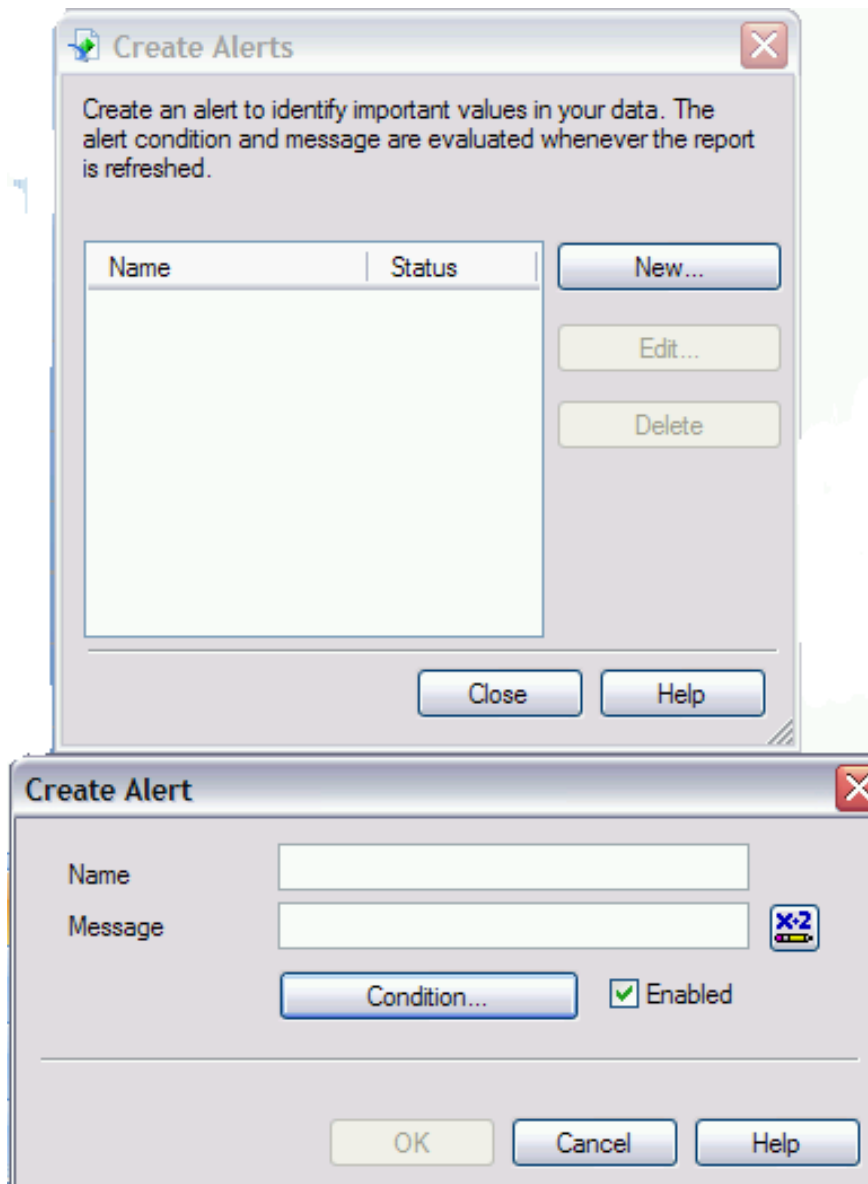
Report Alerts

- Report Alerts are custom messages that appear when certain conditions are met by data in the report.
- You can set a Report Alert to merely inform the reader of the condition, or specify a course of action to take.

Report Alerts

- As an example, we will use report 9a.rpt which displays last year sales from USA customers only. An alert will be displayed whenever orders over \$5,000 are placed.
- A Report Alert added to the Customer Orders by Country (USA) report will do the job.
- First, create the text of the alert. Then, set the condition that will trigger the alert.
 1. With the target report active, choose Report ➔ Alerts from the main menu.
 2. From the sub menu that appears, click Create or Modify Alerts. The Create Alerts dialog box appears, as shown on the next slide.

Report Alerts



Report Alerts

3. Click the New button to display the Create Alert dialog box.

- *Note:* This is not the same as the Create Alerts dialog box in Step 2.

4. In the Name field of the Create Alert dialog box, enter BonusTime.

5. Click the Formula Editor button to the right of the Message Field to display the alert Message Formula Editor version of Formula Workshop.

Report Alerts

6. From the Report Fields pane, drag Customer.Company Name, and drop it in the upper-left corner of the formula area that fills the lower half of the Workshop.

7. Type a space, a plus sign, and then another space to the right of the Customer.CompanyName field in the formula area.

8. To the right of the plus sign and space, type the text string, “ has made a BIG order!”

Note the blank space between the opening quote and the first word. Be sure to include the opening and closing double quotes in the string that you type. The formula should appear as shown in the next slide.

Report Alerts

9. Click the Save and Close button to return to the Create Alert dialog box.

10. In the Create Alert dialog box, click the Condition button.

The Alert Condition Formula Editor version of the Formula Workshop appears.

Now specify what condition must occur that will trigger the display of this Report Alert:

1. From the Report Fields pane, drag the LastYearSales Amount field into the formula area and drop it in the upper-left corner.

Report Alerts

2. In the Operators pane, expand the Comparisons node and drag the Greater Than operator down. Drop it just to the right of the LastYearSales Amount field.

3. To the right of the Greater Than symbol, type 5000. This produces the formula shown below.

4. Click Save and Close to once again return to the Create Alert dialog box.

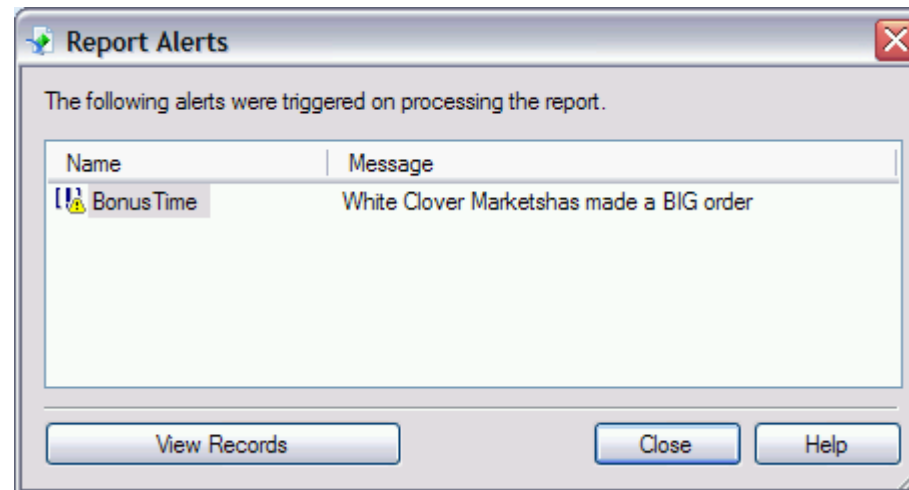
5. Ensure that the Enabled condition is selected (checked), and then click OK.

This puts your new Report Alert into the Create Alerts dialog box, as shown.

6. Click the Close button to return to your report

Report Alerts

Now Click Refresh on the Toolbar. You should get an alert popup as below:



Clicking on View Records shows you all the LastYearSales that exceeded \$5,000.