

caCORE Training Workbook

Course 2020: Using the caDSR Sentinel Tool



caCORE Training Website
Help & Support
subject)

http://ncicb.nci.nih.gov/NCICB/training/cadsr_training
ncicb@pop.nci.nih.gov (please include "caCORE Training" in the

Revision History

Authors/Responsible Party	Revision Number	Page(s) Effected	Date
Becky Angeles	Original	All	September 21, 2006
Becky Angeles	1	2-27	September 27, 2006
Jennifer Brush	2	All - review	December 11, 2006
Becky Angeles	3	All - review	May 8, 2007

Table of Contents

1	INTRODUCTION	4
2	COURSE DETAILS	4
3	LESSON 1: PURPOSE AND FUNCTION OF THE CADSR SENTINEL TOOL	4
3.1	OBJECTIVES FOR THE LEARNER	4
3.2	SENTINEL TOOL OVERVIEW	4
3.3	ACCESSING THE SENTINEL TOOL	5
3.3.1	Login	6
3.4	USER INTERFACE – HELPFUL HINTS	6
4	LESSON 2: SENTINEL TOOL FUNCTIONALITY	7
4.1	OBJECTIVES FOR THE LEARNER	7
4.2	GETTING STARTED	7
4.3	CREATE A NEW ALERT DEFINITION	8
4.4	EDIT AN EXISTING ALERT DEFINITION	9
4.4.1	Configure When to Watch: Properties Tab	10
4.4.2	Configure What to Report: Report Details Tab	11
4.4.3	Configure What to Watch: Criteria Tab	13
4.4.4	Configure What to Watch For: Monitors Tab	14
4.4.5	Helpful Hints	15
5	LESSON 3: VIEWING, DELETING, AND CREATE FROM EXISTING ALERTS	15
5.1	OBJECTIVES FOR THE LEARNER	15
5.2	VIEWING ALERT DEFINITIONS	16
5.3	CREATE USING EXISTING	17
5.4	DELETING ALERTS	17
6	LESSON 4: RUNNING ALERTS	17
6.1	OBJECTIVES FOR THE LEARNER	17
6.2	AUTOMATED RUN	17
6.3	MANUAL RUN	18
7	LESSON 5: VIEWING ALERT NOTIFICATIONS	20
7.1	OBJECTIVES FOR THE LEARNER	20
7.2	INTERPRETING ALERT REPORT OUTPUT	20
8	REFERENCES AND RESOURCES	22
9	CONTACT INFORMATION	23

1 Introduction

Welcome to caCORE Training. The session is designed for caDSR Users and Metadata Consumers, including caBIG Developers and other participants.

In order to receive credit for mastery of this content, you will need to register for this course and complete the accompanying quiz in the caBIG Learning Management System.

To register, go here: <http://ncicbtraining.nci.nih.gov/TP2005/tp2000web.dll/NCICBTraining>

We want these sessions to be as effective as possible in meeting your needs so we ask that you complete the short training evaluation form (available when you register for a course) to share your feedback on the overall quality of the training process and materials.

2 Course Details

Course Category: caCORE
Course Number: 2020
Course Title: Using the caDSR Sentinel Tool
Course Level: Intermediate
Audience: caDSR Users and Metadata Consumers

This course is divided into 5 Lessons:

- Lesson 1: Purpose and Function of the Sentinel Tool
- Lesson 2: Overview of Sentinel tool Functionality
- Lesson 3: Viewing, Deleting and Creating New Alerts from Existing Alerts
- Lesson 4: Running Alerts
- Lesson 5: Viewing Alert Notifications

3 Lesson 1: Purpose and Function of the caDSR Sentinel Tool

3.1 Objectives for the Learner

On completion of this lesson, you will be able to:

- Discuss the purpose of the Sentinel Tool
- Discuss the primary function of the Sentinel Tool
- Identify how to access the caDSR Sentinel Tool

3.2 Sentinel Tool Overview

The caDSR was designed with an emphasis on reusing metadata both within and across contexts. In the past, caDSR users were responsible for manually tracking changes to content they had designated for reuse, or notifying other caDSR users when changes occurred to their own content. As the number of caDSR users increased, a more efficient and reliable system of notification was needed. The Sentinel Tool was created to give caDSR users the ability to track changes to caDSR metadata.

The caDSR Sentinel Tool is a web-based tool (<http://cadsrsentinel.nci.nih.gov>) that allows users to monitor activity in the caDSR database. The Sentinel allows users to create and manage Alert Definitions for the caDSR database. Alert Definitions are a set of rules that are periodically evaluated against the caDSR. If the conditions in those rules are met, notification is sent to the user (via email) in the form of a hyperlink to an Alert Report. Alert Reports detail the changes (activities) that have taken place within the database.

The caDSR Sentinel Tool provides users with the ability to monitor all changes to the following: Data Elements, Data Element Concepts, Value Domains, Object Classes, Properties, Permissible Values and EVS Concepts. The Administered Components of interest are specified through the selection of one or more of the following criteria:

- Context
- Protocols
- Forms / Templates
- Classification Scheme / Classification Scheme Item
- Administered Component Type
- Created By
- Modified By

Users can also specify Administered Component attributes to monitor, including:

- Workflow Status
- Registration Status
- Version

The Sentinel Tool provides benefits to all caDSR users. Specific examples of roles and benefits include:

- Context Administrator – needs to know when Administered Component (AC) changes are made to a selected Context. Context Administrators may want to know who is using various metadata.
- Form Builder – needs to know when Administered Components used by a particular form/template directly or indirectly change.
- Application Developer – needs to know when Administered Components used within an application are undergoing content or format changes.
- Metadata Curator – needs to monitor the creation of new Administered Components, status changes, and use of particular Administered Components.
- Metadata Mentor – needs to monitor changes made by a particular user and changes made to a particular collection of metadata.
- Preceptors – needs to monitor changes by project.

The Sentinel Tool Help Documentation provides a complete description of the functionality and use of the tool. You can view the documentation by navigating to the Sentinel Tool and clicking the Help button.

3.3 Accessing the Sentinel Tool

The caDSR Sentinel Tool requires user authentication. For your convenience, a set of training usernames and passwords have been created for use on the staging server. Feel free to use any of these for training purposes:

- Trainee01 / Trainee01

- ...
- Trainee09 / Trainee09
- Trainee10 / Trainee10

Once you have completed all the training courses required for your role, you can request an individually curator's account from:

http://ncicb.nci.nih.gov/NCICB/training/cadsr_training/Enrollment/caDSRAcctRequest/

3.3.1 Login

The Sentinel Tool can be accessed at: <http://cadsrsentinel-stage.nci.nih.gov>. To gain access to the Sentinel Tool, enter a username and password and click the Login button. Figure 1 below shows the login window.

Figure 1. Login Window

3.4 User Interface – Helpful Hints

A few helpful hints while using the Sentinel Tool include:

- Do Not Use the Browser (Back and Forward) Buttons for Navigation – only use Sentinel Tool buttons
- Using the Sentinel Tool's Back button is the same as Undo –selections made on the edit screen/tabs are not saved
- A user can run Alerts on any caDSR context
- When specifying criteria, try to be specific - a broad criteria generates a long report
- Make sure the Alert Report Distribution is correct, especially if using a training or shared caDSR account
- Save frequently

4 Lesson 2: Sentinel Tool Functionality

4.1 Objectives for the Learner

On completion of this Lesson, you will be able to:

- Create a New Alert Definition
- View your list of current Alert Definitions
- Edit existing Alert Definitions
- Configure Alert Definition Distribution
- Interpret Sentinel Alert Reports

4.2 Getting Started

A new Sentinel Tool user will not have any Alerts defined. The initial Alert window is shown in Figure 2.

National Cancer Institute U.S. National Institutes of Health | www.cancer.gov

caDSR Sentinel Tool

caDSR Alerts

Create Edit Create Using Delete Run Show All Logout Help

<input type="checkbox"/>	Name	Summary	Frequency	Last Auto Run	Active	Creator
<p>Welcome to the caDSR Sentinel Tool. This tool allows the creation and maintenance of Alert Definitions for monitoring activity within a caDSR database. To begin, please use one of the following procedures.</p> <ol style="list-style-type: none"> 1. Select the Create button to create a new Alert Definition. 2. Select the Show All button for a list of existing Alert Definitions. Select the one which appears to most closely match the desired criteria. Select the Create Using button to customize and save the new definition. <p>Additionally, you may Edit, Delete and Run any Alert Definition which you create.</p>						

Create Edit Create Using Delete Run Show All Logout Help

v 3.2.0.1.20070102 (jboss-4.0.4.GA/1.5.0_06)

Figure 2. Main Window

The primary screen within the Sentinel Tool is the Alert List. All features are accessible from this screen. Upon completion of a task, the interface will often return to this screen. The screen consists of command buttons and the Alert List.

Buttons are located at both the top and bottom of the screen for your convenience. These buttons perform actions on one or more Alerts and are enabled or disabled to reflect valid actions given by the Alerts selected. The Edit, Run and Delete actions are restricted to the Alert creator only.

A brief summary of each button's functionality:

- **Create:** Opens a new screen with simplified selections to create a new Alert Definition.
- **Edit:** Requires the selection of one Alert from the current list then opens the edit window to allow changes to the selected Alert.
- **Create Using:** Requires the selection of one Alert from the current list then opens the edit window using the information from the selected Alert with some properties modified to reflect the new state.
- **Delete:** Requires the selection of one or more Alerts from the current list then opens a confirmation message box to avoid accidental deletion. Once confirmed, the selected Alerts are permanently removed from the database. To stop the inclusion of an Alert in the Auto Run Process it is not necessary to delete it.
- **Run:** Requires the selection of one Alert from the current list then opens the run submission window to allow the selection of run options.
- **Show All / Show Private:** This button switches between "Show All" and "Show Private". Pressing "Show All" displays all Alerts defined in the database. Pressing "Show Private" displays Alerts that were created by the current user.
- **Logout:** Appears on every screen and terminates the current Sentinel Tool session and returns the user to the Login screen.
- **Help:** Appears on every screen and displays the help file in a separate browser window.

4.3 Create a New Alert Definition

To Create a new Alert, click the Create button on the Login screen. The caDSR Alert Definition is the first window for a new Alert Definition (see Figure 3).

NATIONAL CANCER INSTITUTE **caDSR** **caDSR Sentinel Tool**

Create caDSR Alert Definition

Save Edit Back Logout Help

Please enter the name for this new Alert Definition.

Alert Name:
New Alert

Please select the initial settings for this Alert.

Monitor all changes to my Context(s) with the exception of TEST and TRAINING.
 Monitor everything created by Jenny Brush.
 Start with a blank Alert and allow me to customize it.

Summary:
Criteria:
Context must be caBIG
Monitors:
All Change Activities

Save Edit Back Logout Help

Figure 3. caDSR Alert Definition

Button functionality:

- Save button will save the Alert Definition and return the user to the Alert list.
- Edit button will open the Alert Definition for creation or modification.
- Back button will return the user to the previous window without saving any recent changes (since the last Save).

To Create an Alert, perform the following steps:

1. Enter a name for the Alert in the Alert Name field
2. Select the initial settings for the Alert. You can:
 - a). Monitor all changes to a context
 - b). Monitor everything created by caDSR Login ID.
 - c). Start with a blank Alert Definition and create a customized Alert by selecting the 3rd radio button and then click the Edit button.

4.4 Edit an Existing Alert Definition

Clicking the Edit button from the Alert Definition window will take you to the Edit caDSR Alert Definition (Custom Report) window. Figure 4 below provides an overview of the Alert Definition window.

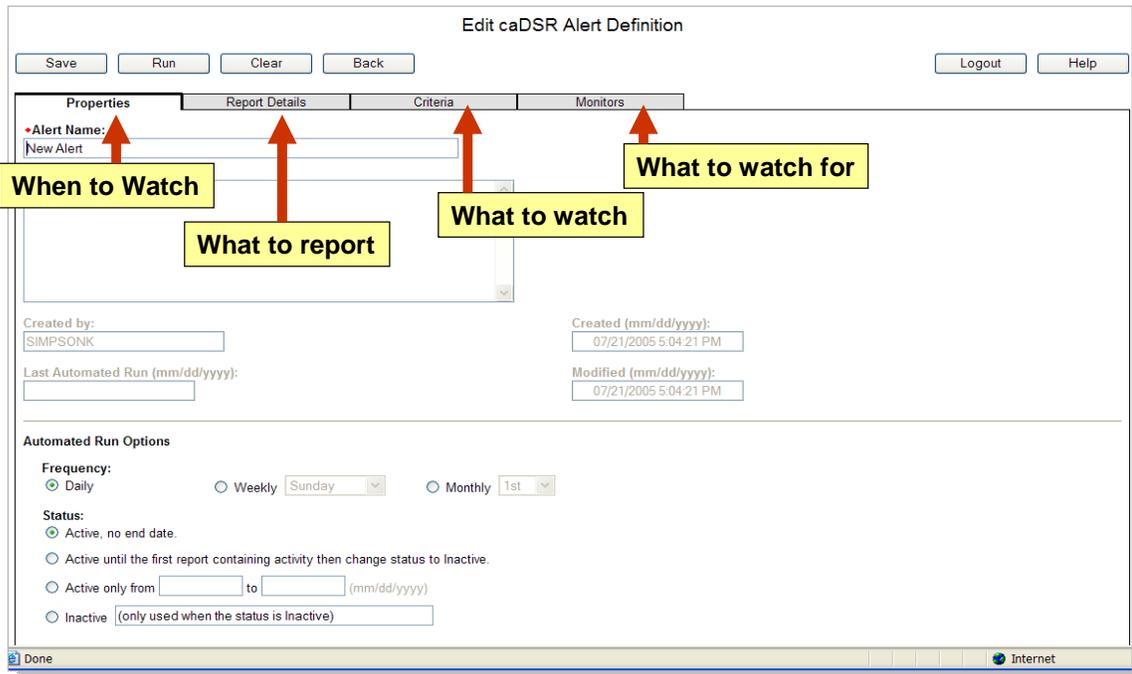


Figure 4. Create a New Alert – Alert Definition Overview

The Custom Report window for Alert Definitions has four tabs: Properties, Report Details, Criteria, and Monitors.

- Properties – where to specify when you want to look for (and report) changes and the status of the Alert. This tab includes the Alert Name, Created By, Created Date, Modified Date and Frequency settings.
- Report Details - where to specify what information (content and recipient(s)) you want included in the report.

- Criteria - where to specify what you want to watch (the scope of the data) to include in the output).
- Monitors - where to specify what you want to watch for (activities that will trigger a report creation).

Buttons:

- Save – saves and closes the Alert – returns the user to the Alert list
- Run – submits the Alert Definition for immediate execution
- Clear – resets all the fields on the Alert (all tabs) to the previously saved settings
- Back – behaves like a Cancel button; returns to the Alert list without saving the Alert Definition. There will not be a “Forward” button to bring you back (no way to get back to the edit screens without starting over)

4.4.1 Configure When to Watch: Properties Tab

To Create a New Alert, the first tab is the Properties Tab. This is where you specify when you want to look for and report changes and also to specify the status of the Alert. The Properties tab includes the Alert Name, Alert Summary, Created by, and relevant dates and is shown in Figure 5 below.

The screenshot shows the 'Edit caDSR Alert Definition' interface with the 'Properties' tab selected. At the top, there are buttons for 'Save', 'Run', 'Clear', 'Back', 'Logout', and 'Help'. Below the tabs, the 'Alert Name' field contains 'New Alert'. The 'Summary' field contains 'When to Watch'. The 'Created by' field contains 'SIMPSONK'. The 'Created (mm/dd/yyyy)' and 'Modified (mm/dd/yyyy)' fields both show '07/21/2005 5:04:21 PM'. The 'Automated Run Options' section includes 'Frequency' (Daily selected), 'Status' (Active, no end date selected), and 'Inactive' options.

Figure 5. Create New Alert - Properties

The Alert Name is used for easy identification of the output, both in the email and the body of the report. Use names to briefly describe the function or purpose of the Alert, for example, “Changes to caBIG” and “Watch for Retired Records”.

The Summary field reflects what is currently saved for the Alert Definition, essentially an overview of the Criteria and Monitors. The Summary field does not reflect changes until the Save button is pressed. Any Reports generated, based on the current report definition, will only include information that meets the description shown.

The user also specifies the Automated Run Options (Frequency and Status) on the Properties tab.

The Automated Run Options control the eligibility of the Alert Definition in the Auto Run Process. The Frequency is the cycle for the Alert execution via the Automated Run process. The process runs daily at a time determined by the System Administrator.

Alerts marked “Daily” are evaluated with each run. Those marked “Weekly” are evaluated only on the specific day of the week selected. Alerts marked “Monthly” are evaluated only on the specific day of the month selected. To indicate the first day of the month, select “1”. To indicate the last day of the month, select “31”.

The Alert may be run manually at anytime via the Run button located on most screens. However, the Automated Run Process requires the Alert to have an Active Status through one of the following methods:

- Set the status to active with no end date - This only limits the execution of the Alert to the Frequency.
- Set the status to run once - After the first report is distributed from this Alert the status is automatically changed to Inactive.
- Set the status to active with begin and end dates.

When the begin date is blank, the Alert is active from its creation to the end date. When the end date is blank, the Alert is active from the begin date forward. All dates use midnight as the time stamp for comparisons.

4.4.2 Configure What to Report: Report Details Tab

The next step in creating a new Alert is to specify what content you want to include in the report and who you would like to send the report to. The Report Details tab is shown in Figure 6 below.

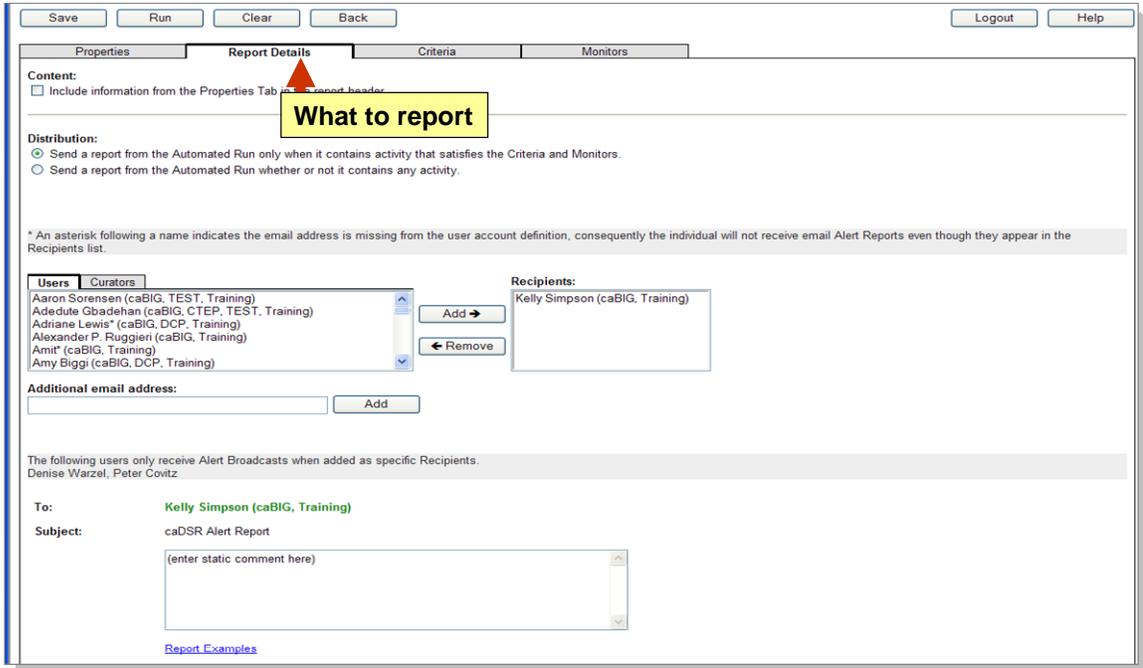


Figure 6. Create New Alert - Report Details

The Content settings control the amount of information in the report. The option to include Properties indicates whether the report starts with abbreviated or expanded information. The report will always contain the Sentinel Name, Summary, Created By, Reporting Date Range, Report Creation Date and Source Database.

The Maximum Associated To Levels selection governs the number of "Associated To" blocks appearing in the report. The level value is literally the number of decimal points that will appear for "Associated To" blocks under the Group column on the report:

- A level of zero (0) indicates the report will contain only the change details.
- A level of one (1) indicates only records directly associated to the changed record will appear following the change block.
- A level of nine (9) shows all associated records.
- The default level on new reports is zero (0).
- All Alert Definitions created prior to the Sentinel Tool 3.1 release have a default of nine (9).

The main focus of the Report Details tab is the Report Distribution. The distribution settings control delivery of reports. First time users may want reports to always be sent to verify that the Alert is executing and the email distribution is working as expected. To reduce the amount of email received, set this option to only send when there is activity to report.

The Recipients may be any combination of any number of the following:

- (1) a User Name as selected from the User list
- (2) a Context Curator Group as selected from the Context Curators list
- (3) a well formed email address as added via the Email Address entry field – if entry is not in a valid e-mail format, a warning message will pop-up.

The user list is alphabetically sorted in ascending order. Each name is suffixed with an asterisk when the account information is missing the email address. In this case the name can be added to the Recipient list and distribution to that user will occur once the account is corrected. Additionally a parenthetical list of Context names shows the Context Curator Groups from which the user will receive Alert distributions. The absence of this list following the name indicates no update privileges are granted.

The Sentinel Tool automatically removes duplicate names from the recipient list prior to sending the report.

There is a list of excluded email addresses - these can be manually added to the recipients list by selecting the specified recipient from the Users list and clicking the Add button.

The user may enter a comment that will be included in the report as shown by the text box at the bottom of the page - "enter static comment here".

4.4.3 Configure What to Watch: Criteria Tab

The Criteria tab allows you to select the things you want to watch – this defines the scope of the Alert (query criteria). This tab is represented in Figure 7 below.

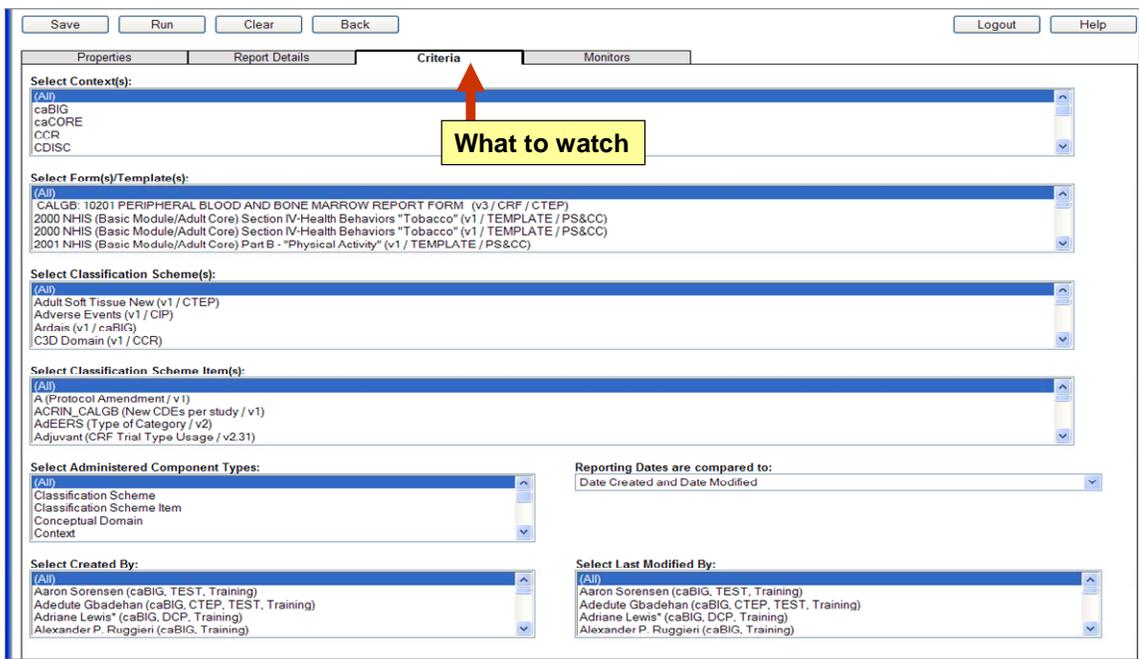


Figure 7. Create New Alert - Criteria

Currently, you can set an Alert to watch the following: Context, Protocol, Form/Template, Classification Scheme, Classification Scheme Item, Administered Component Type, Reporting Date comparisons, Workflow Status, Registration Status, Created By user and Modified By user. These selections are combined using logical "OR" conditions within a category and logical "AND" conditions for the criteria.

The Alert Report output will only contain changes related to the areas selected. Use the CTRL key click to select multiple list items. Be careful not to make the criteria too broad as this will result in massive reports.

These criteria selections encompass all caDSR records either directly or indirectly related to them. The Alert does not distinguish how the association may occur, only that after following all record associations it eventually falls within the scope defined. This approach has the potential to expand into a large number of associated records resulting in large report output.

Although Workflow Status and Registration Status appear on both the Criteria and Monitors tabs they are interpreted very differently. When either is specified on the Criteria tab, the Administered Components must contain the same value. For example, selecting a Workflow Status of RELEASED will only report on Administered Components currently set to RELEASED. If the Workflow Status is changed to RETIRED, the Administered Component is not included by this Alert Definition because its' current value is RETIRED. It may seem setting the Criteria to RELEASED and the Monitor to RETIRED would only report Administered Components changed from RELEASED to RETIRED, however, this will not happen during the report creation. No provision currently exists in the Sentinel Tool for this specific use case.

4.4.4 Configure What to Watch For: Monitors Tab

The Monitors tab is where you select what kind of changes you are watching for. The Monitors tab contains an explanation of how selections are interpreted by the Sentinel Tool (see Figure 8).

Save Run Clear Back Logout Help

Properties Report Details Criteria **Monitors**

Monitor Workflow Status(es):
 (Any Change)
 (Ignore)
 APPRVD FOR TRIAL USE
 CMTE APPROVED
 CMTE SUBMTD
 CMTE SUBMTD USED

Monitor Registration Status(es):
 (Any Change)
 (Ignore)
 Application
 Candidate
 Proposed
 Qualified

Monitor Version:
 Any Change
 Whole Number Change
 Ignore
 Specific:

These are the selections to specify the activities which will trigger an Alert Report.

- All selections combine into a logical "OR" condition. This is fully expanded in the Summary Description after the Alert is saved.
- Setting "Any Change" on all of the above will trigger a Report by any change activity within the caDSR. Making one or more selections will interrogate changes only to Data Elements, Data Element Concepts and Value Domains. Changes to other record types are not tracked with sufficient detail at this time to apply these specific property selections.
- The property selections apply uniformly. For example, if Workflow Status Released is selected it applies to a change made to a Data Element, Data Element Concept or Value Domain. Any one of these will trigger the report.
- The Version Whole Number Change triggers only when the digit on the left side of the decimal changes. The Version Any Change triggers with any modification to the Version.
- In all cases "Ignore" disables the trigger for the property. If all selections are set to "Ignore" a warning message appears however the Alert Definition may still be saved.

What to watch for

Figure 8. Create New Alert - Monitors

The user must specify what changes trigger an Alert.

- Independently watch for changes in:
 - Workflow Status
 - Registration Status
 - Version Number

The selections for the Monitors control the type of activity that triggers creation of an Alert Report. When all the selections on this tab are set for "Any Change" then any activity within the scope definition from the Criteria tab will create a report. Specific selection of values on this tab,

cause only those activities to be reported. Currently Workflow Status, Registration Status and Version are the only attributes presented for selection. This does not imply only changes to these attributes trigger an Alert report. It means these are the only attribute values that can be specified through the user interface.

In the following examples it is assumed the information falls within the scope selections from the Criteria tab. When all of these attributes are set to "Any Change", a report is created, for example, when a Value Domain is changed to be associated to a different Conceptual Domain. When Workflow Status is set to "Retired", only change groups containing a Workflow Status of "Retired" trigger and appear in a report.

Changes may occur individually or in groups as reflected by user actions in the CDE Curation and Admin tools. For example, a user may edit a Data Element and change its description, save it, then realize they wish to edit the same Data Element and change its Workflow Status. Because these actions happened at different times they are not part of the same change group. However, if both changes are made at the same time, the old and new Description appears with the old and new Workflow Status on an Alert Report.

Records for Data Elements, Data Element Concepts and Value Domains can appear in groups because changes to every attribute of these records are tracked. All other record changes, e.g. Conceptual Domain, Permissible Value, etc, are not tracked at this level of granularity. When a change occurs to these other records all that is known is the user id and time stamp of the change and the report will show the details as "Not Available".

4.4.5 Helpful Hints

Here is a summary of information covered in the Create New Alert section above.

- When creating new Alerts for training purposes, always use the Stage environment.
- When using a training account, add your personal email address to the Edit, Report Details, and Additional Email Address fields.
- Sample Scenarios to create Alerts for:
 - Show only newly created records – by selecting "Date Created" in the "Reporting Dates are compared to" field on the Criteria Tab.
 - Monitor only Data Element Changes – select "Data Elements" under the "Selected Administered Component Types" on the Criteria tab.
 - If you are a Context Administrator, you may wish to monitor all changes made to all Administered Components within your context – select "Context" on the Criteria tab.
 - If you are a Form Builder, you may wish to select a specific form or template to monitor form-related fields – select "Form/Template" from the Criteria tab.

5 Lesson 3: Viewing, Deleting, and Create from Existing Alerts

5.1 Objectives for the Learner

On completion of this lesson, you will be able to:

- View Alert Definitions
- Delete Alert Definitions

- Create a New Alert Definition based on an existing Alert Definition

5.2 Viewing Alert Definitions

Once you have defined an Alert (or clicked the Show All button) the Alert list window will look like Figure 9 below. The colored bars provide a visual separation between Alerts.

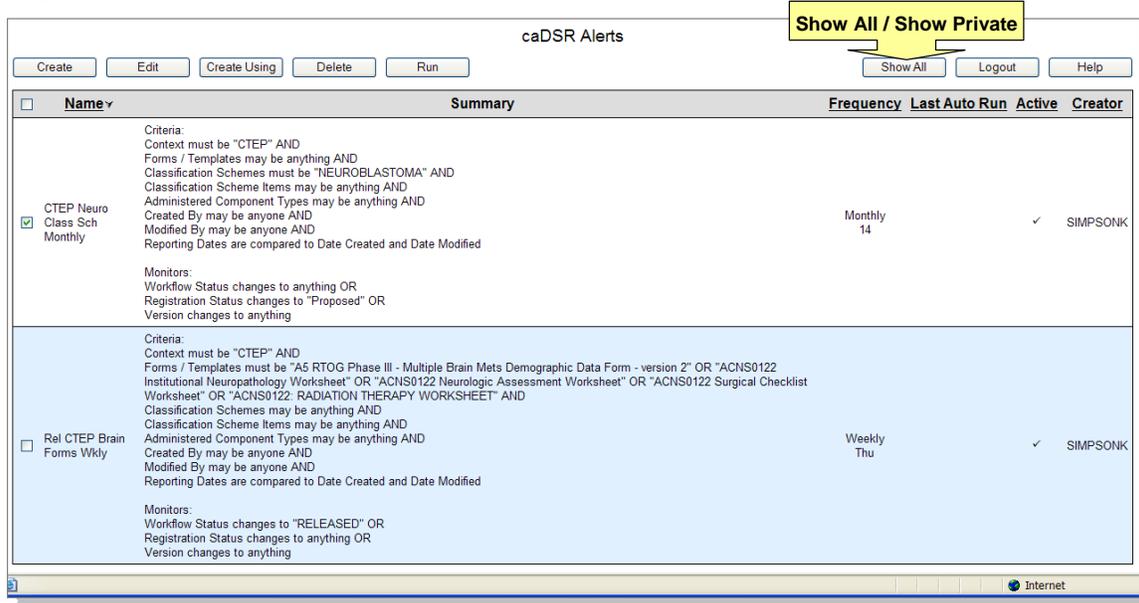


Figure 9. Alert List

The column headings may be selected to sort the list. Selecting a heading once sorts the list in ascending order, selecting the same heading again sorts in descending order. To perform a more complex sort, select the desired columns in reverse order. For example to sort the list by Name and Last Auto Run, first select the column heading for the Last Auto Run then select the column heading for Name. By default the Alert List is initially sorted by Name.

The information presented on the Alert List screen is:

- Name: The name as provided by the Creator on the Edit Properties screen. Names are not required to be unique. Alert Definitions are created with a hidden unique identifier to allow editing names at the creator's discretion.
- Summary: The summary is generated from the content of the Alert Definition when a Save is performed. This column can not be used for sorting.
- Frequency: The frequency is set by the Creator on the Properties screen. In the example above, the first Alert is set to run on the 14th day of every month. The 2nd Alert is set to run on Thursday of every week.
- Last Auto Run: The date/time is set by the Sentinel Auto Run Process when the Alert Definition is evaluated. This date is set whether or not a report is generated. For example, the frequency of an Alert Definition is set to daily but the date/time shows a date from more than a week ago. Upon inspection of the Alert Definition, note the Start and End dates are set and the Active period ended on the date of the Last Auto Run. A blank date/time and the string "(not yet run)" indicates a report has never been created for this Alert by the Auto Run Process.

- Active: The active state of an Alert Definition appears as a check mark when the Edit Properties shows a state other than Inactive. An 'x' will appear when the state is set to Inactive on the Edit Properties screen.
- Creator: The creator is shown using the login id.

Each Alert has a selection check box. To select or de-select an Alert, click the checkbox to the left of its name. The check box in the title bar selects all Alerts displayed in the list. The only operation that applies to multiple Alerts selected is the Delete, and it is only active if you are the creator for all the Alerts selected. You can only delete Alerts that you have created.

Selecting an Alert (clicking on the checkbox) will activate the context sensitive buttons at the top and bottom of the window.

5.3 Create Using Existing

To Create a New Alert Using an Existing template, follow these steps:

- Select an existing Alert from the Alert List (Show All)
- Click the “Create Using” button
- Change the Alert Name
- Make Desired Changes to Fields on all Tabs (refer to Create a New Alert for additional instructions)
- Save the New Alert

5.4 Deleting Alerts

To Delete an Alert that you created, follow these steps:

- Select the Alert(s) in the List Window that you created that you wish to delete
- Click the Delete button

Remember, you can only delete Alerts that you have created.

6 Lesson 4: Running Alerts

6.1 Objectives for the Learner

On completion of this lesson, you will be able to:

- Discuss Automated Runs
- Initiate a manual run of an alert definition

Running Alerts can be done using the Automated Run option located on the Properties tab or Manually running the Alerts by clicking the Run button from the Alert List or Alert Definition tabbed windows.

6.2 Automated Run

The user specifies the Automated Run Options (Frequency and Status) on the Properties tab.

The Automated Run Options control the eligibility of the Alert Definition in the Auto Run Process. The Frequency is the cycle for the Alert execution via the Automated Run process. The process runs daily at a time determined by the System Administrator (currently 4AM EDT).

Alerts marked “Daily” are evaluated with each run. Those marked “Weekly” are evaluated only on the specific day of the week selected. Alerts marked “Monthly” are evaluated only on the specific day of the month selected. To indicate the first day of the month, select “1”. To indicate the last day of the month, select “31”.

The Alert may be run manually at anytime via the Run button. However, the Automated Run Process requires the Alert to be in Active Status using one of the following methods:

- Set the status to active with no end date - This only limits the execution of the Alert to the Frequency (see above).
- Set the status to run once - After the first report is distributed from this Alert the status is changed to Inactive automatically.
- Set the status to active with begin and end dates.

When the begin date is blank, the Alert is active from its creation to the end date. When the end date is blank, the Alert is active from the begin date forward. All dates use midnight as the time stamp for comparisons.

Sample Automated Runs:

- User wants to see new Administered Components created every day:
 - Select “Date Created”
 - Set Frequency (Properties tab) = Daily
 - Result: Report will only show what was newly created in the past day.
- User wants to see Administered Components that already existed but were modified in the past day:
 - Select “Date Modified”
 - Frequency (Properties tab) = Daily
 - Report will show changes to existing components.
Note: this will only show newly created components if they have also been edited within the specified period.

Selecting “Date Created and Date Modified” will show both newly created and newly modified items.

6.3 Manual Run

The Manual Run option can be initiated by selecting an Alert from the Alert List or any of the Alert Definition tabbed windows. Figure 10 below represents the caDSR Manual Alert Run window.

Figure 10. Manual Alert Runs

The Manual Run screen provides input for a report date range and a selection to use either the creator as the sole recipient or the defined recipient list. The request can then be submitted to the server for the single Alert Definition by selecting the Run button from the List and Edit screens. Manual Runs always send an email whether or not the report contains activity. The receipt depends on many factors including the number of manual runs being processed and the volume of output generated by the Alert execution.

To execute a Manual Run, follow these steps:

- Select an Alert from the Alert List (the Run button will only be active if the selected Alert was created by the current user)
- Click the Run button
- Set desired options (Default, Today, Yesterday)
- Submit
- View the Alert Report

A Manual Run executes the same logic and code as an Auto Run with minor exceptions. First, the Manual Run will only execute one Alert Definition where the Auto Run may execute many. Second, a report is always sent via email on a Manual Run, the Report Distribution settings are overridden. This approach also has the effect that an Alert Definition can be edited and run without the need to first save the changes. Consequently, examples and experimentation can be done easily to fine tune the Alert Definition.

For example, for a Manual Alert Run – selecting “Date Created” and specifying a Begin and End Date from the Manual Alert Run window will produce a report showing administered components that were created during the specified time. Note: some of these may have been created and also modified during the time period.

7 Lesson 5: Viewing Alert Notifications

7.1 Objectives for the Learner

On completion of this lesson, you will be able to:

- Interpret Alert Report Results

7.2 Interpreting Alert Report Output

The e-mails distributed from the server for both Manual and Automated Runs will contain a brief general introduction supplied by the system administrator and a link to each Alert Report output file. Here is a summary description of the Alert Report Output:

- ▶ User is notified of reports via email
- ▶ Email shows the alert definition name, the link to the report, and the number of rows in the report
- ▶ Report format
 - Organization
 - Content
- ▶ Reports will be kept for 1 month. User should save locally if necessary.
- ▶ Different record types have varying degrees of information available; future versions will have additional information.
- ▶ Report results are very dynamic

Figure 11 below shows a sample Alert Report e-mail containing the Alert Definition Name, Link to the Alert Report and the number of rows in the Report. All e-mails are sent with a default summary of what is contained in the link and how to view / save the report.

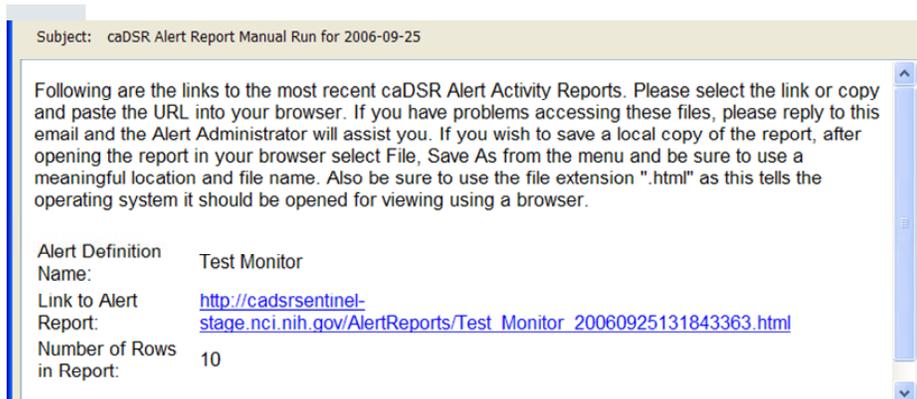


Figure 11. Sample Alert Report E-Mail

Reports contain two sections, a header and body. The header always contains the Sentinel Name, Created By user, Summary, Static Introduction (from the Edit, Report Details tab), Reporting Date Range and Reporting Creation Date. Additional information will appear as

selected from the Edit, Report Details options. A sample Alert Header can be found in Figure 12 below.

Sentinel Name:	Retired Components	Alert Name
Introduction:	(enter static comment here)	
Created By:	Kelly Simpson	Alert Definition Author
Criteria:	Context must be "caBIG" AND Forms / Templates may be anything AND Classification Schemes may be anything AND Classification Scheme Items may be anything AND Administered Component Types may be anything AND Created By may be anyone AND Modified By may be anyone AND Reporting Dates are compared to Date Created and Date Modified	Criteria Tab Selections
Monitors:	Workflow Status changes to "RETIRED ARCHIVED" OR "RETIRED DELETED" OR "RETIRED PHASED OUT" OR "RETIRED WITHDRAWN" OR Registration Status changes to "Retired" OR Version changes to anything	
Summary:		Monitors Tab Selections
Last Auto Run Date:	07/15/2005 4:30:01 AM	Properties Tab Selections/Information
Frequency:	Daily	
Status:	Active, no end date.	
Reporting Dates:	07/15/2005 To 07/26/2005	
Report Created On:	07/26/2005 4:37:55 AM	
Source Database:	NCICB Stage caDSR	caDSR Database

Figure 12. Alert Report Header

The Alert Report Header contains the following information:

- Sentinel Name - the Alert Name specified by the user when creating the Alert.
- Introduction - contains any text entered by the user in the text box at the bottom of the Report Details window (under the email recipients and subject).
- Created By - the Sentinel user that ran the report.
- Summary - contains the same information that is shown on the Properties window (selections from the Criteria and Monitors tabs).
- The Last Auto Run Date - shows the date and time that the Alert was automatically run (i.e., not manually executed).
- The Status shows whether the Alert is active or inactive, based on the settings on the Properties tab.
- Reporting Dates - the dates that were specified on the Properties tab.
- Report Created On - the date the report was generated.
- Source Database - which caDSR database the Alert was monitoring (e.g., Stage, Production).

The remainder of the report contains the body - The body contains details relating to the records and changes that caused creation of the Alert Report. (See Figure 13).

Public ID	Version	Modified By	Modified Date	Created By	Created Date
106	4.1	SBR	07/11/2005 1:58:49 PM	Brian Campbell	12/07/2004 8:57:45 AM

Attribute Name	Old Value	New Value
Modified Date	02/16/2005	07/11/2005
Modified By	Brian Campbell	SBR

Figure 13. Change Blocks

The report body contains several major blocks of information. Each block starts with a Row Number, Group Number, Record Type prefix and Record Name.

The Row Number shows the number of logical rows of information in the report. As you will see in following examples this does not represent the number of physical lines. When the Record Type prefix begins with "Changes to the ..." the block indicates an actual change to the record being described. When the prefix begins with "Associated to ..." the block indicates the record is associated in some way to the most previous change block. These Associated records have not changed. They are provided for the user analysis of possible collateral impacts occurring from the actual change. The Group Number shows the proximity of the change.

Change blocks are indicated by a bright blue row. Changes are grouped by record type (e.g., Data Element, Data Element Concept, Value Domain, and Permissible Value). They contain general information about the Administered Component that changed along with the specific changes for each modified attribute. Each change block represents the changes made to an Administered Component on a specific day (i.e., there may be several modifications listed under a change block).

Associated blocks follow the light blue rows. These indicate Administered Components associated to the change through the data hierarchy/relationship. An owner or user of an associated component should review the changes and assess impact. Figure 14 below represents an associated block from a sample report output.

Row Number	Group Number	Record Name	Public ID	Version	Modified By	Modified Date	Created By	Created Date
436	54.1	Associated To Classification Scheme Item: DFMO/Sul Colon III	N/A	N/A			Dianne Reeves	06/24/2004 12:54:45 PM
437	54.1.1	Associated To Classification Scheme: Clinical Trial Management Systems	2183535	1	Denise Warzel	04/29/2004 12:00:00 AM	Denise Warzel	04/29/2004 12:00:00 AM
438	54.1.1.1	Associated To Context: caBIG	N/A	1	SBR	01/14/2005 5:38:37 PM	SBR	04/29/2004 7:46:31 AM

Figure 14. Associated Blocks

8 References and Resources

Below is a list of links to documentation used to create this session and of recommended reading materials.

caDSR Homepage:

- http://ncicb.nci.nih.gov/NCICB/infrastructure/cacore_overview/cadsr

caDSR Training Home Page

- http://ncicb.nci.nih.gov/NCICB/training/cadsr_training

caCORE Technical Guide:

- https://qforge.nci.nih.gov/docman/view.php/58/4034/caCORE_3.2_Technical_Guide.pdf

caDSR Business Rules

- http://ncicb.nci.nih.gov/NCICB/infrastructure/cacore_overview/cadsr/business_rules/

caDSR_Users ListServ Subscription:

- https://list.nih.gov/archives/cadsr_training-l.html
- <http://list.nih.gov>

Send Request for caDSR Account to:

- ncicb@pop.nci.nih.gov

9 Contact Information

NCICB Application Support:

Instructor:

NCICB Liaison:

Jennifer Brush

Dianne Reeves

ncicb@pop.nci.nih.gov

brushj@mail.nih.gov

reevesd@mail.nih.gov