

# Table of Contents

- Configuration** ..... 2
- Customer management* ..... 2
- Birthday greetings* ..... 4

[Manuals, Quick Tour](#)

# Configuration

The first step is to enter into **AwareIM** the instructions on how our application should work, in other words to configure the application. To do this we start the Configuration Tool. You can start the Configuration Tool by clicking on the “Start Configurator” button at the top of AwareIM Control Panel. When the Configuration Tool prompts you to enter credentials, enter the name of the application you specified when running AwareIM Control Panel for the first time. Enter admin as the default user name and enter the word password as the initial password.

The left-side panel of the Configuration Tool shows the configuration elements tree (see the “[Configuration Tool Overview](#)” section). The tree shows the default business space with the name you specified and the two business space versions (1.0 and 1.1). Version 1.1 one is ready to be modified. We will be doing our configuration in this version – this will include configuration of the application details, testing the application and making it operational (see the “[Business Space Versions and Version Control](#)” section for details on working with business space versions).

## Customer management

We will begin our configuration work by specifying the elements allowing staff members to register, find and maintain customers. First we need to define a Customer business object that is going to represent a company customer in the system. There are several facts that need to be registered for a customer. Each of these facts is stored in a separate attribute with the type that best suits the nature of the fact (see the “[Business Objects as Carriers of Data](#)” section for more details on business objects and their attributes). For the purpose of our exercise the Customer object will have the following attributes (the attribute name is followed by the attribute type):

- Name: Plain Text
- DateOfBirth: Date
- EmailAddress: Plain Text
- Gender: Plain Text (Male or Female)
- Address: Plain Text

To create a new business object click on the little plus sign to the left of the business space version 1.1 to see the items it contains, select the “Business Objects” item and choose the “New” command from the toolbar (or select “File/New” in the menu or right click and select “New” from the popup menu). The business object editor appears in the working panel. There is also a list of properties of the object and a list of properties of a selected attribute underneath. Click on the “Name” property in the list of properties of the object and enter 'Customer'. Then click on the icon to enter the attributes of the object. Specify the name of the attribute and choose the type of the attribute. The first three attributes are essential for the purpose of our exercise, as we will see shortly, so when entering the attributes tick the 'Required' checkbox in the list of attribute properties for each of them. This will instruct **AwareIM** to validate the data entered by staff members and disallow empty entries.

Since our system is going to send e-mails to customers, we need to nominate Customer as an intelligent business object. In **AwareIM** intelligent objects are those that can receive and process information (see the “[Intelligent Business Objects](#)” section for more information on intelligent

objects). Communication with such objects is performed via communication channels. In this case we need to define the e-mail channel. Click on the “Communication” property in the list of properties of the object and tick the checkbox next to the “E-mail” communication channel. We then enter the parameters required to connect to the mail server. These are the same parameters you use to set up your e-mail program. When the definition of the Customer object is finished, we click on the “Save” button in the application toolbar to save the object configuration (or select File/Save command from the menu).

All information processing in **AwareIM** is controlled by rules. Most rules are attached to business objects. A single object may have many rules attached to it. Such rules are independent of each other. For example, we may add a validation rule to the Customer object that instructs **AwareIM** to disallow registration of customers under 16 years old:

```
IF AGE(Customer.DateOfBirth) < 16 THEN
  REPORT ERROR 'Customer cannot be under 16 years old'
```

To we click on the “Update Rules” tab at the bottom of the screen. The rule editor appears in the working area. Click on the  icon - the dialog comes up where we enter 'Age validation' as the rule name. Click OK on the dialog and the entry for the rule is displayed in the list of rules. The rule editor is shown underneath. We will enter the first line of the rule text shown above as the rule condition (without the IF part) and the second line of the rule text shown above as the rule action (without the THEN part). Click on the  icon to save the rule. Click on the “Save” button in the application toolbar to save all rules of the Customer object.

Similarly we could add as many rules as necessary to the Customer object to instruct **Aware IM** on what our system should do when a customer is registered or updated. See the [Rule Evaluation](#) section for details on how rules work.

Next we will define a query, also called “Customer”, to allow staff members to find a particular customer. Queries are used in **AwareIM** to find information of interest in the system (see the “[Data Retrieval](#)” section for more on queries). This simple query will find and display all Customer objects with names containing text entered by the user and sorted by customer's name. To add the query select the “Queries” item in the tree under version 1.1 and choose the “New” command from the application toolbar. The query editor appears in the working area. Enter 'Customer' as the name of the query (using the Name property), select Customer business object from the drop down of business objects in the “What to look for” section of the editor and enter a condition in the Where section as follows:

- Attribute: Customer.Name
- Criterion: Contains
- Value: (Ask at run-time)

In the 'Sorting of results' section select the “Name” attribute and “Ascending” order.

Click on the 'Display as' property in the list of query properties to display the “Display Query Results” dialog. In the 'Attributes to Display' table tick Name, DateOfBi rth and Address. We now want to add a button next to each record of the customer to allow users to navigate to the form of this record. To do this, click on the Add button next to the “Operations with Items” table. In the operation dialog specify Edit as the name of the operation and then select “Edit Object” as operation type. Click OK to close the operation dialog.

Click on the OK button to close the “Display Query Results” dialog and then click on the “Save” button to save the query.

We want operations that are commonly performed by staff members to be readily available on the screen. This can be achieved by placing such operations in the main menu of the system that will always be visible on the screen. We will add two operations to the menu:

- New Customer. This operation will allow registration of new customers. It will display a form where staff members can enter details of new customers.
- Find Customer. This operation will allow staff members to find registered customers.

The menu, as well as many other details related to screen layout and visual settings, can be configured in the visual perspective editor (see the “[Visual Perspective](#)” section for more information on visual perspectives). Expand the item 'Visual Perspectives' in the tree under version 1.1 and double click on the item named “Administrator”. This is the visual perspective provided by **AwareIM** for the system with default settings. Expand the 'Top Bar' entry in the table to show the menu of the system. Click on the 'Menu' entry in the tree and then click on the icon to add a new menu item. In the dialog that appears enter 'New Customer' as the name of the new item and click on the Details button next to the Command to execute entry. Select the 'Create Object' as the item type and tick the Customer object as the parameter of the command. Click OK twice to submit the dialogs. The new menu item appears in the table.

To configure the 'Find Customer' operation, select the 'Menu' entry and click on the icon to add another menu item. Enter 'Find Customer' as the item name and select 'Run Query' as the command type. Select the “Customer” query as the parameter of the “Run Query” command. Click on the “OK” button twice to save the changes to the menu and then click on the “Save” button in the application toolbar to save changes to the visual perspective.

This concludes the configuration work necessary to let the staff members register and maintain company customers. To save the work, right click on the business space version 1.1 in the tree section of the Configuration Tool and select the “Update” command from the popup menu.

## Birthday greetings

Let us now add a few configuration elements to prepare the system for sending birthday greeting e-mails.

The personalized greeting e-mail is configured as a notification that we will call BirthdayEmail. In **AwareIM** notifications are used to send messages to people or other software systems via different channels. The content of notifications is held in attributes, like those of business objects (see the “[Communication with Other Systems](#)” section for more details on notifications). Some channels expect certain attributes from notifications sent through the channels. Since we are going to send BirthdayEmail via the e-mail channel, it should have the following two attributes:

- Subject: Plain Text – used as the email subject line
- Message: Plain Text – used as the email body

Unlike business objects, users do not enter the contents of notifications on the screen. Instead, it can be either set upfront or added dynamically by rules. For the BirthdayEmail notification we are going to initialize the required attributes with some contents that **AwareIM** can personalize before the e-mail

is sent to a customer.

To configure the BirthdayEmail notification select the Notifications item in the tree under version 1.1, right-click on it and choose “Add Outgoing E-mail Notification” from the popup menu. The notification editor appears in the working area. Enter 'BirthdayEmail' as the notification name in the list of properties of the notification. In the attribute table select “Subject” and then click on the Initial Value property in the list of properties of the attribute. Enter the following as the initial value for the attribute:

```
Happy birthday!
```

Select Message attribute in the table of attributes and click on the Initial Value properties to enter the following:

```
Dear <<Customer.Name>>,  
Happy birthday to you!  
We wish you all the best for the future.  
Sincerely,  
The company
```

The tag enclosed in the angle brackets in the first line contains the name of an attribute that **AwareIM** will use to replace the tag when the notification is constructed, thereby personalizing the text (see the “[Document Generation](#)” section for details on working with tags). Click on the “Create” button to save the notification.

We will also need a query that finds all customers whose birthday is on the current date. The query is called Birthday customers and looks like this:

```
FIND Customer WHERE MONTH(Customer.DateOfBirth) = CURRENT_MONTH AND  
DAY_OF_MONTH(Customer.DateOfBirth) = CURRENT_DAY_OF_MONTH
```

We can enter the query in almost the same way as how we entered the Customer query, except that we click on the Textual view tab at the top of the query editor. We then enter the above text into the editor and click on the “Save” button to save the Birthday customers query.

Now we need to bring together the parts that find birthday customers and send greetings to them. In **AwareIM** this is done using processes, which are usually configured as a sequence of rules (more information on processes can be found in the “[Processes as Links between User Interface and Business Logic](#)” section). We will call the process CongratulateBirthdayCustomers, and it will contain the following two rules:

```
FIND 'Birthday customers'  
SEND BirthdayEmail TO Customer
```

To configure this process select the “Processes” item in the tree under version 1.1 and choose the “New” command from the application toolbar. The process editor appears in the working area. Enter

'CongratulateBirthdayCustomers' as the process name in the list of process properties and click on the icon to add a new rule. Enter the name of the new rule and then enter the two lines above into the light yellow-colored cells in column Action 1 on the right as actions for Rule 1 and Rule 2 respectively. Note that both rules have no conditions. Click on the "Save" button to save the process.

The last element we need to configure is a scheduling rule instructing **AwareIM** to start our process on a daily basis, say at 7 o'clock in the morning (see the "Scheduling" section for details on how the scheduling works). Click on the "Scheduling" item in the tree under version 1.1 and choose the "New" command from the application toolbar. The scheduling rule editor comes up. Click on the icon to enter a new rule and enter 'Greet customers' as the rule name. The entry for the rule will appear in the list. Select the 'Daily' radio button in the 'Recurrence pattern' section of the rule editor, select the CongratulateBirthdayCustomers process in the "Actions" section and enter 07:00 as the start time. Click on the "Save" button to save the scheduling rule.

The configuration work for our application is done.

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Last update: **2026/01/08 03:50**

