Alert Centre - Checkpoint

Administrator User Guide

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This guide covers the Alert Centre functionality for administrators to manage alerts for their contacts.

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Overview

Alert Centre provides organisations with enhanced organisational alert management. It provides the ability to create and manage alert notifications for groups within Checkpoint.

For information on how to create different types of alerts such as Search Based and Table of Contents Alerts, this is found in the Alerts Guide via the Help link on Checkpoint AU.

Alert features by access levels

The features accessible to each person are controlled by the access level assigned. A person can have 2 types of Alert access levels; Individual and Administrator. Administrators must be assigned a role of Organisational (default) or Delegated. Below is a table outlining the different available based on the access level.

	Individual	Administrator	
Feature	**User**	**Organisational**	**Delegated**
Create and manage My Alerts	X	X	X
Share My Alerts (to Administrators)	X	X	X
Self subscribe to Organisational Alert	X	X	X
Create and manage My RSS Feed	X	X	X
Create and manage Organisational Alerts		X	X
Add and modify subscribers of Organisational Alerts		X	X
Convert Individual Alerts to Organisational Alerts		X	X
Modify Alerts		X	X
Manage contact permissions (Delegate Administration Rights)		X	

Requesting access permissions

Individual User access to Alert Centre is available for all Username and Password or IP Personalised Users in the organisation. IP Anonymous Users are not able to access the Alert Centre.

Organisational Administrator access must be requested by contacting Customer Care on **1800 020 548** or by emailing LTA.TechCare@thomsonreuters.com

Delegated Administrator access can be authorised by an Organisational Administrator within Alert Centre.

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Organisational Alerts

The icon indicates an Organisational Alert can be set on the current search or selected items from the Table of Contents.

Create a new Organisational Alert

1. Begin by running a search or selecting items from the table of contents. From the search results page or the selected table of contents click the **Organisational Alert** **icon** to create an organisational alert.
2. From the **Create a new Organisational Alert** page, enter details for this Alert.

Label	Description
Alert Name	Enter a name for the alert
Client ID	Optional, enter a client ID for your reference
Frequency of Alert	Select a frequency for when your alert will be sent
Select Day	Select the day of when your alert will be sent (applicable for Weekly frequency)
Select time	Select a time of day the alert is to be sent
Time zone	Select a time zone (the default will the time zone set under Preferences)
Show Excerpt of item	Select the detail level of the alert. Note: Full only applies to News alerts.
Email Format	Select the format
Notify even when no results returned	Select if you want to be notified when no results
Notes/Comments	This allows the organisational administrator to share with Users important information about the alert for reference at a later date. Maximum characters 1000
Page size	Optional, only applicable for non email formats
Include Status Flags	Optional, only applicable for non email formats
Include Highlighted Terms	Optional, only applicable for non email formats
Include Summary Page	Optional, only applicable for non email formats

3. Click **Create Alert**.

Tip: Notes are displayed internally only they are not published with the email alert.

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4. Select the contacts who should receive this email alert on the **Organisational alerts – Subscribe Users**.

Once an individual has been subscribed to an alert the subscriber will commence receiving alerts whenever the alert is next scheduled to deliver.

Tips:

If you do not add contacts as a subscriber, the Organisational created alert will appear as an alert your contacts can under My Alerts> Alerts I can subscribe to. To edit who can opt in to this alert, go to Manage Members.

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Manage Organisational Alerts

The alert centre provides the ability to manage alert settings.

1. Click **Alert Centre.**
2. Click **Organisational alerts** from the Alerts Centre options.

Checkpoint features a number of different icons to assist you with managing Organisational Alerts. For help and to view a full list of tools click, **What do all these icons represent?**

Organisational Alerts

💡 What do these icons represent?

Show / hide columns

Show 10 ▼ entries   Search: [   ]

Alert Name ▲	Frequency ⇕	Client ID ⇕	Actions	Date Created ⇕

What do these icons represent?   ✕

Icon	Name	What it does
⚙	Edit Alert Settings	Change the settings of the alert
📁	Manage Members	Only Members can subscribe / be subscribed to an alert
👤	Manage Subscribers	Subscribers recieve the email alert
📝	Modify List	Modify the current list of documents associated with this alert
🔍	Edit Search	Edits the search criteria of this alert
✕	Delete Alert	Delete this alert permanently

Edit Alert Settings
1. Click the **Edit Alert Settings** ⚙ icon from the Organisational Alerts page.
2. **Edit Alert Settings**
    a. Update delivery options
    b. Update Notes/Comments - Enter text into the Notes/Comments box - maximum characters 1000.
3. Click Modify Alert.

Edit Search
1. Click the **Edit Search** 🔍 icon from the Organisational Alerts page.
2. **Edit Search**
    a. Search based alert
        i.   Edit the search terms
        ii. Click on update your selection link
    b. Table of contents alert
        i.   Select the required content from the TOC
        ii. Click on update your selection link
3. Click Modify Alert.

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Manage Organisational Alert Subscribers

Once an organisational alert is created, the Organisational Administrator has the ability to subscribe members to receive email alerts. The administrator can;

1. Manage members – Add contacts so they can **self subscribe** to the Alert. This is ideal for suggesting alerts to people and all contacts are added by default.
2. Manage subscribers – This allows the administrator to **mandate the alert** for a person(s) and automatically subscribe an alert. The person must be added as a member first.

Once an individual has been subscribed to an alert the subscriber will commence receiving alerts whenever the alert is next scheduled to deliver.

To Manage Subscribers

If the alert has just been created the Organisation Alert Admin – Subscribe Users page will be displayed jump to step 4.

If you are updating an existing alert:

1. Select **Alert Centre** from the in the navigation toolbar.
2. Click **Organisational alerts** from the Alerts Centre options.

3. From the **Organisational alerts** list click the **Manage Subscribers** icon
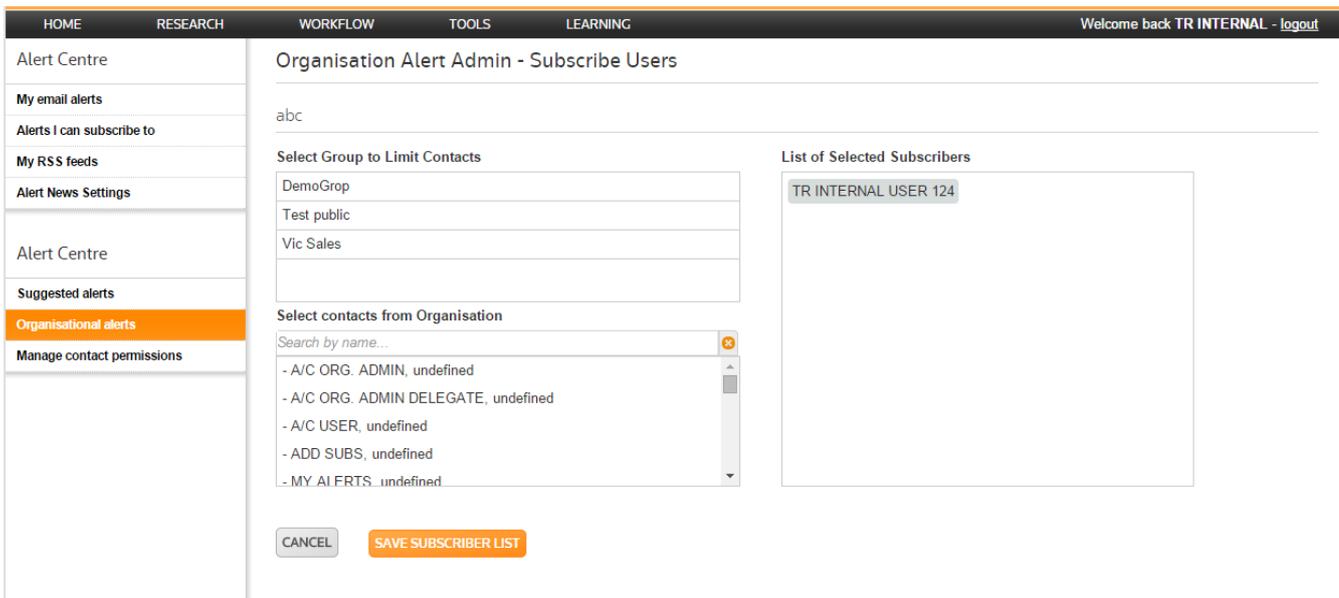
4. From the **Organisational alerts – Subscribe Users**
   a. Select **Contacts from Organisation** – all Users will be listed unless you have selected a group from the list. Search by name or scroll through the list and click to select individual members
   b. Select **Group to Limit Contacts** – select a group from the list e.g. Library Team to display group members. Select members from the contacts list to limit who will subscribe to this alert.
   c. List of **Selected Subscribers** – these are the subscribers from the organisation who will receive the alert.

5. Click **Save Subscriber List**.

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Modify List

1. Click the **Edit Alert Settings** icon from the Organisational Alerts page.
2. To remove any results tick the checkbox
3. Scroll to the end of the page and click Save and Update removed items' to save.

Preview Organisation Alert

ITAA 36 org alert

Place a check mark next to each item you would like to remove from your result, then click the Save and Update Removed Items button at the bottom of the page. Any items already checked below have already been removed from the results. You may add removed items back to the results by simply clearing the check from the box.

☐ **1. Division 713 – Rules for particular kinds of entities**
Document: Annotated Legislation
Renditions: Australian Income Tax 1997 Legislation
Jurisdiction: Australia

☑ *2. Table of sections*
Document: Annotated Legislation
Renditions: Australian Income Tax 1997 Legislation
Jurisdiction: Australia

☐ **3. Table of sections**
Document: Annotated Legislation
Renditions: Australian Income Tax 1997 Legislation
Jurisdiction: Australia

☐ **4. Table of sections**
Document: Annotated Legislation
Renditions: Australian Income Tax 1997 Legislation
Jurisdiction: Australia

Tips:
If no results have been generated for the Alert, you will receive a message advising no results.

Convert Suggested Alerts to Organisational Alerts

As the Organisational Administrator you are required to approve or reject suggested alerts from individual users within the organisation. Once the administrator accepts a suggested alert it will appear in the Organisational alerts page alongside other Org Alerts where members and subscribers can be assigned.

To approve or reject a shared alert

1. Select **Alert Centre** from the in the navigation toolbar.
2. Click **Suggested alerts** from the Alerts Centre options on the left.
3. Review the suggested alerts then select **Accept** or **Reject**.

HOME	RESEARCH	WORKFLOW TOOLS LEARNING	Welcome back **TR INTERNAL** - logout

My Alerts

My email alerts
Alerts I can subscribe to
My RSS feeds
Alert News Settings

Alert Centre

Suggested alerts
Organisational alerts
Manage contact permissions

Suggested Alerts

Show / hide columns

Show 10 ▼ entries   Search:

Alert Name ▲	Create Org Alert?	Frequency ⇕	Date Created ⇕
Alert24-State Duties and Other Taxes	Accept Reject	DAILY	26/02/2015

Showing 1 to 1 of 1 entries   First   Previous   1   Next   Last

4. From the **Organisation Alerts Administration** page locate the Accepted alert and click the Manage Members 🖼 icon.
5. Tick the **Allow All Users to Subscribe** or if restricted access is required select individual members from the Contacts list.
6. Click **Save Members List**
7. From the **Organisation Alerts Administration page** locate the Accepted alert and click **Manage Subscribers**.
8. Select the Users you wish to receive the Alert.
9. Click **Save Subscriber List**.

Tips:
- Members are Users who can subscribe to Alerts via the Alerts I can subscribe to page.
- Subscribers are Users who will receive Alerts.
- Tick "allow all users to subscribe" unless you want to restrict access to specific Users.

Manage Contacts Permissions

Organisational Administrators have the ability to delegate administrator rights to other users within the organisation. This is restricted to Administrators only.

Delegate Administrators have all the capabilities of an Organisational Administrator except the ability to Manage contact permissions i.e. Delegate Authority.

Delegating Authority

1. Select **Alert Centre** then select **Manage contact permissions** from the Alerts Centre menu options.
2. Locate the **User Name** and click "Assign as a Delegate" from the Actions column.
3. Click **Yes** then **Ok.**

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Tip: When "Unassign" delegate permission is selected the change will take effect within 24 hours.

Identify Users with Aggregated Alerts

Alert Centre provides the ability to aggregate organisational alerts into one daily email. To view a list of users with aggregated alerts within your organisation.

1. Select **Alert Centre** then select **Manage contact permissions** from the Alerts Centre options.
2. See **Aggregated Alert** column for list of Users who have aggregated their alerts.

Identify Users with Breaking News Alerts

Alert Centre provides the ability for individuals to subscribe to Breaking News. To view and manage a list of users with breaking news within your organisation;

1. Select **Alert Centre** then select **Manage contact permissions** from the Alerts Centre options.
2. See **Breaking News** column for list of Users who have subscribed to Breaking News alerts.

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Manage My Contacts List

Use the My Contacts option to create and manage groups. These groups can be updated or deleted at any time as members change or leave an organisation.

1. Click **Preferences** from the system toolbar
2. Go to the Administration section and click link to view contacts in your account.
3. To create and add a new group click **Add Group**.

4. Enter a new group name into the **Create Group** box e.g. *R&D Research Group*.
5. Select **Contacts** from the contacts list on the left.
6. Click **Save Group.** The newly created Group will now be added to the My Contacts list.

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Tip: Private is only viewable to the user who created it. Public is available to everyone in your organisation.

My Email Alerts Interaction

As an administrator, you need to be aware of user initiated tasks that you may be required to act on. These include;

1. Approving and rejecting suggested alerts

Please refer to the My Alert Guide to learn more about those features.

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