Westlaw AU
Alert Centre User Guide

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Westlaw AU

Alert Centre

Alert Centre provides organisations with enhanced alerting and organisational alert management. It provides the ability to create, manage and customise alerts from Westlaw AU.

This guide covers the enhanced Alert Centre functionality. For information on creating Search Based and Table of Contents Alerts view the WLAU - My Alerts Guide also available via the Help link on Westlaw AU.

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Alert Centre Levels

There are three access levels in the Alert Centre – Individual Users, Organisational Administrators and Delegated Administrators. Below is a table outlining the different available based on the access level.

Feature	Individual User	Organisational Administrator	Delegated Administrator
Create RSS Feed	X	X	X
Create Individual Alert	X	X	X
Share Individual Alert	X	X	X
Self Subscribe to Organisational Alert	X	X	X
Create & Manage Organisational Alert (add/modify members & subscribers)		X	X
Convert Individual Alerts to Organisational Alerts		X	X
Alert Integration (HTML/XML/RSS)		X	X
Modify Alerts		X	X
Modify User Permissions (Delegate Administration Rights)		X	

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.
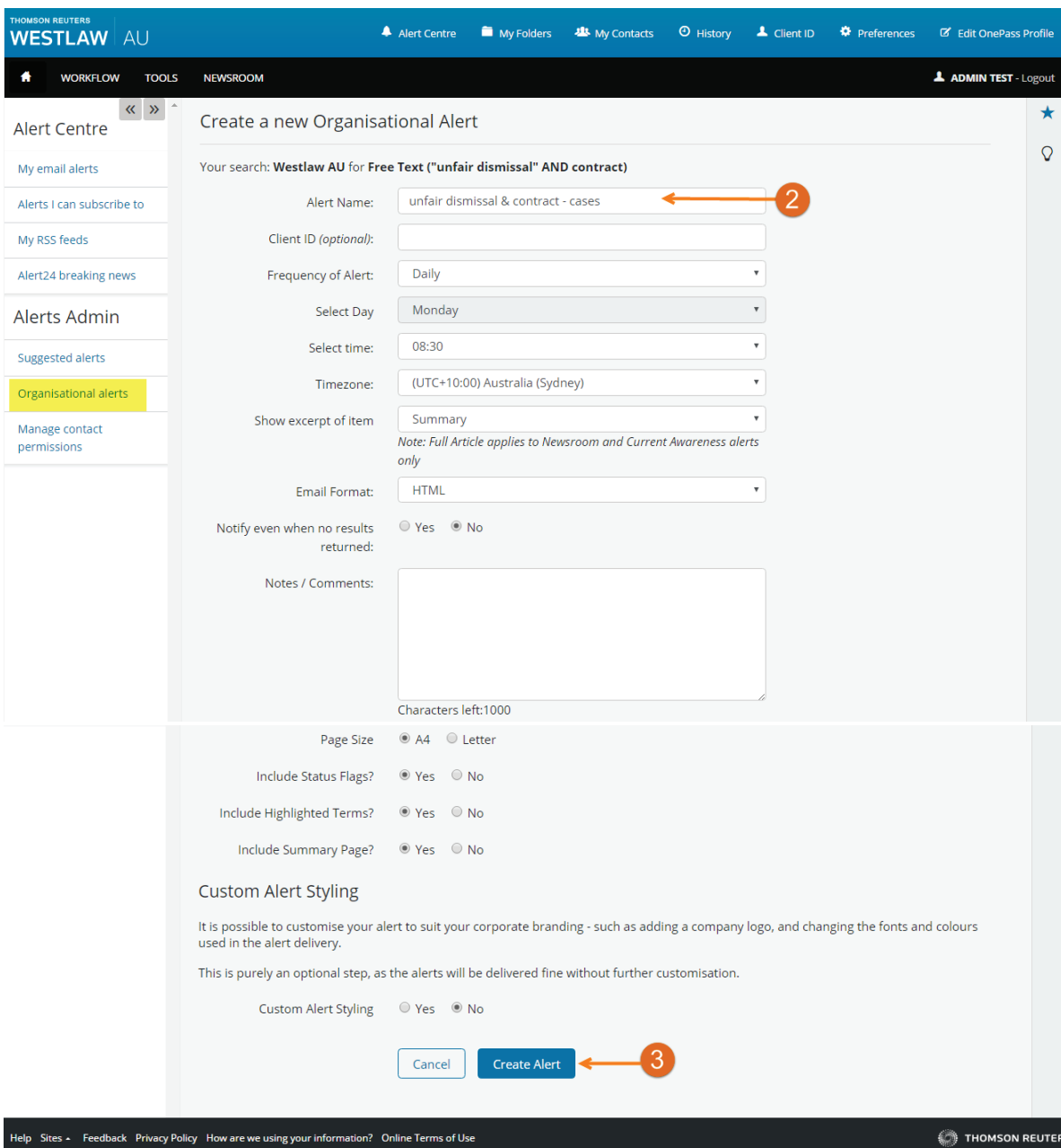
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Administrator Features

Create an Organisational Alert

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

Creating an 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] icon to create an organisational alert.
2. From the **Create a new Organisational Alert** page, enter an Alert Name and select the preferred delivery options.
3. Click **Create Alert**.

This will display the **Organisational Alerts Admin – Subscribe Users** page with a list of contacts from your organisation.

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Manage Subscribers

Once an organisational alert is created, the Organisational Administrator has the ability to subscribe members/users to receive email alerts. 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 Admin** from the Alerts Admin options.
3. From the **Organisational Alerts Admin** list click the **Manage Subscribers** icon

4. From the **Organisational Alerts Admin – 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**.

Your alert is now complete. If your alert will also be integrated into your intranet or business systems go to Integrating Alerts.

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Adding Notes to an Alert

Alert Centre provides the ability to add a note to an alert. This allows the organisational administrator to share with Users important information about the alert for reference at a later date.

Notes can be viewed by subscribers when viewing the **My Email Alerts** page. If Notes is not displayed you will need to click on the **Show/hide columns** button on the My Email Alerts page to view.

To Add a Note

The best time to add a note is when creating a search based or table of contents alert. Enter a note into the Notes/Comments box and click Save Alert.

1. Select **Alert Centre**.
2. Click **Organisational Alerts** from the **Alerts Admin** options.
3. Click the **Edit Alert Settings** ⚙ icon.
4. Enter text into the Notes/Comments box - maximum characters 1000.
5. Click **Modify Alert** to save the note.
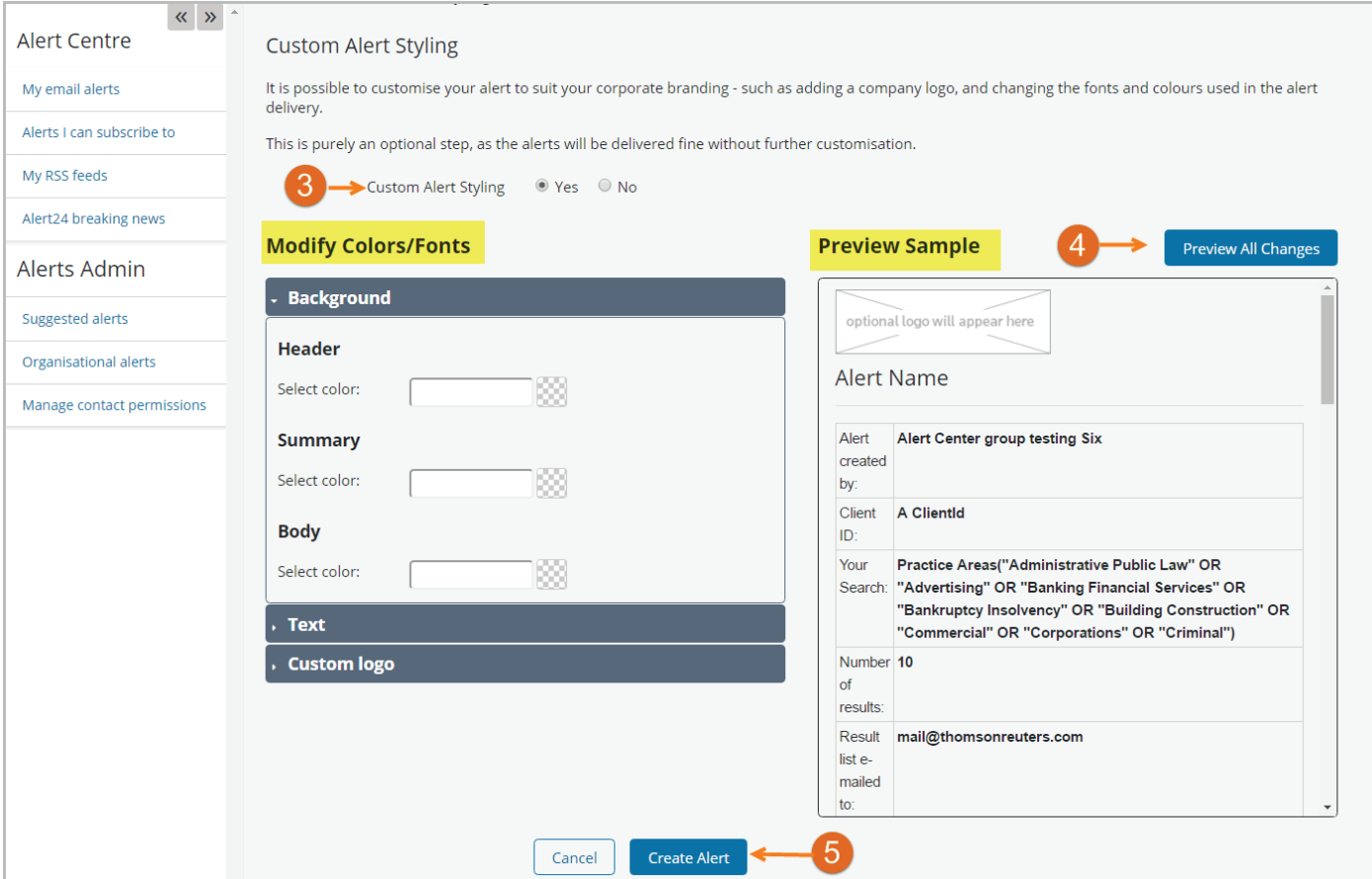
> *Tip: Notes are displayed internally only they are not published with the email alert.*

Customising Organisational Alerts

It is possible to customise organisational alerts to suit your corporate branding. This includes the ability to customise the font (style, size and colour), background colour and logo.

To Customise Alerts

1. Begin by creating a Search or Table of Contents Organisational Alert.
2. Click the Organisational Alert 📇 Icon and select the required delivery options from the **Create a new Organisational Alert** page.
3. Select **Yes** for **Customer Alerting Styling**. This will display Background, Text and Custom Logo options:
    a. Set the background colours and fonts;
    b. Set the text colour and fonts;
    c. Set a customer logo.
4. Click **preview all changes**.
5. Click **Create Alert**.

Tips:
1. *Customisation must be completed when an alert is first created and cannot be set as the default style.*
2. *Once an alert has been created changes to customisation will require a new alert to be recreated.*

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Convert Individual 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 Admin 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 Admin options on the left.
3. Review the suggested alerts then select **Accept** or **Reject**.

4. From the **Organisation Alerts** 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 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.*
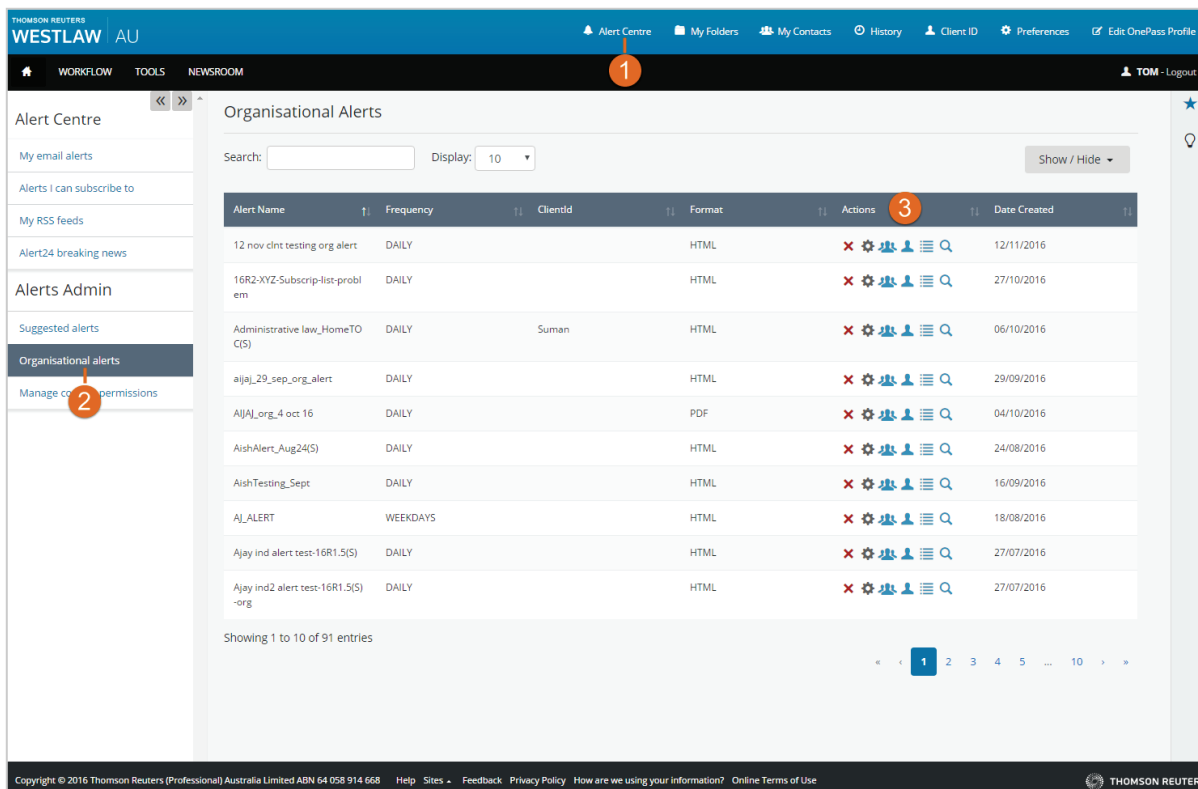
Edit Alert Settings

The Alert Centre provides the ability to edit an alert. This includes modifying the settings of an alert as well as the search criteria.

Edit Alert Settings

Follow the steps below to edit an alert.

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

3. Click the **Edit Alert Settings** ⚙ icon or the **Edit Search** 🔍 icon from the Organisational Alerts Administration page.
4. Edit Alert Settings
   a. Update delivery options
   b. Click Modify Alert.
5. Edit Search
   a. Search based alert
      i. Edit the search terms
      ii. Click on update your selection link
      iii. Click Modify Alert
   b. Table of contents alert
      i. Select the required content from the TOC
      ii. Click on update your selection link
      iii. Click Modify Alert.

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Manage Contact Permissions (Not available for Delegated Administrators)

Organisational Administrators have the ability to delegate administrator rights to other users within the organisation.

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 Admin menu options.
2. Locate the User Name and click "Assign" from the Actions column.
3. Click Yes then Ok.

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 **Modify contact permissions** from the **Alerts Admin** options.
2. See **Aggregated Alert?** column for list of Users who have aggregated their alerts.

Individual User Features

For information on creating individual Search and Table of Contents Alerts view the WLAU - My Alerts Guide also available via the Help link on Westlaw AU.

My Contacts

Use the My Contacts menu 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 **My Contacts** from the system toolbar.
2. To create and add a new group click **Add Group**.
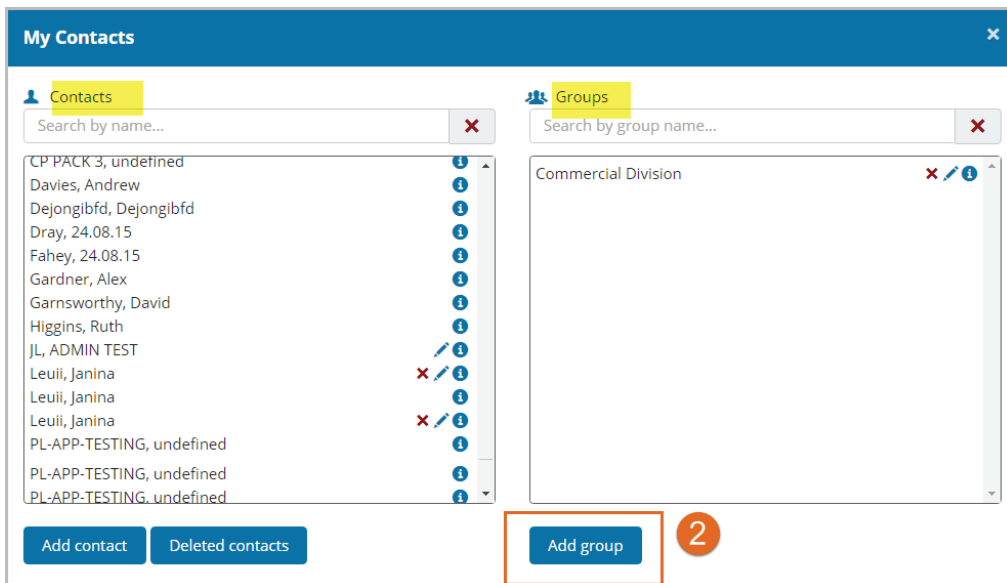
3. Enter a new group name into the **Create Group** box e.g. Commercial Division.
4. Select **Contacts** from the contacts list on the left.
5. Click **Save Group**. The newly created Group will now be added to the My Contacts list.
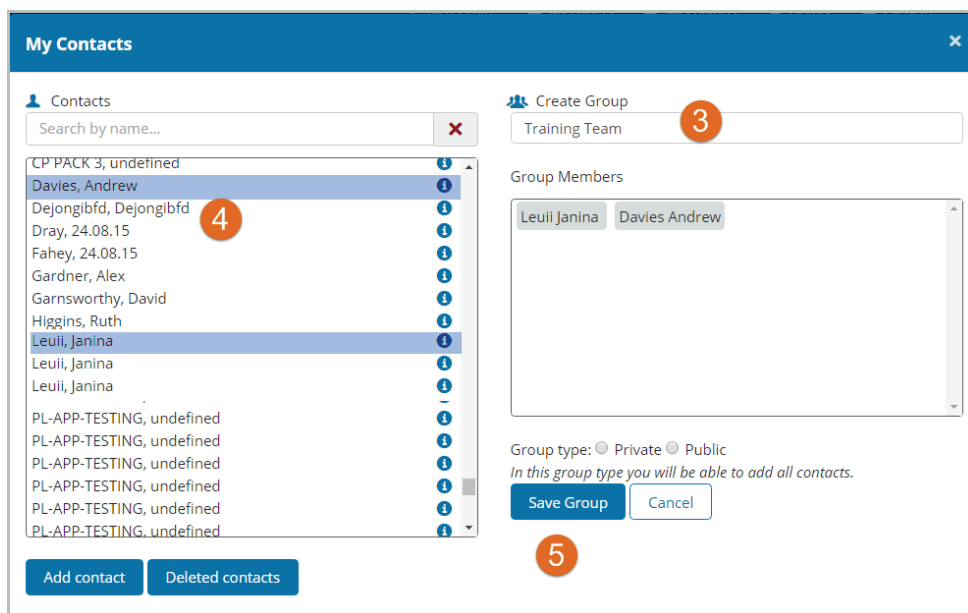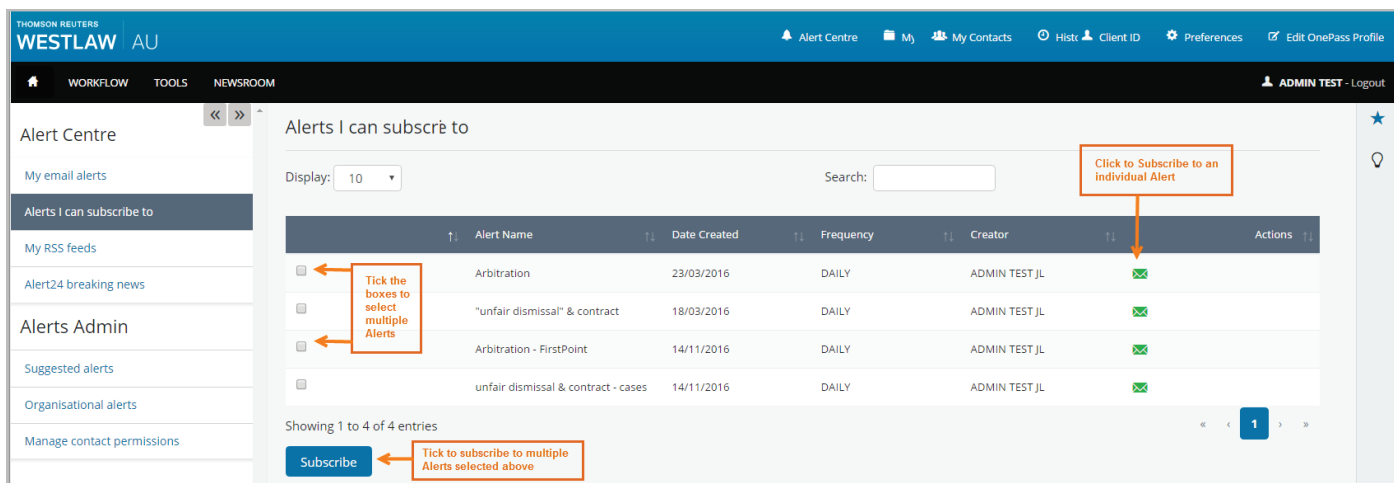
Tip: *Private is only viewable to the user who created it. Public is available to everyone in your organisation.*

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Self Subscribe to an Organisational Alert

Individual users can Self Subscribe to alerts that they have been assigned to as Members.

To Self Subscribe to an Organisation Alert

1. Click **Alert Centre**.
2. Click **Alerts I can subscribe to** from the left column.
3. From the list of alerts click on the **Subscribe** ✉ icon in the actions column or place a tick next to the alert name and click **Subscribe**. The alert or alerts selected will then appear in the My Email Alerts page.

Share an Alert with Others

As an Individual User you can create your own alerts. In addition you can share them with others in your organisation by suggesting that they become an organisational Alert.

1. Click **Alert Centre**.
2. Locate an alert from the My Email Alerts page and click the **Share Alert with Others** 💬 icon from the Actions column. The alert will appear in the **Suggested Alerts** page for the organisational administrator to accept or reject.

Aggregate Organisational Alerts

Alert Centre provides the ability to aggregate organisational alerts into one daily email.

1. Click **Alert Centre**.
2. Click **Consolidate Org. Alerts** from the My Email Alerts page.

3. Choose a **Frequency**, enter an email address, and select a file format and whether you want to be notified of no results.
4. Click **Save Alert**.

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