



Westlaw AU

Alert Centre User Guide

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.

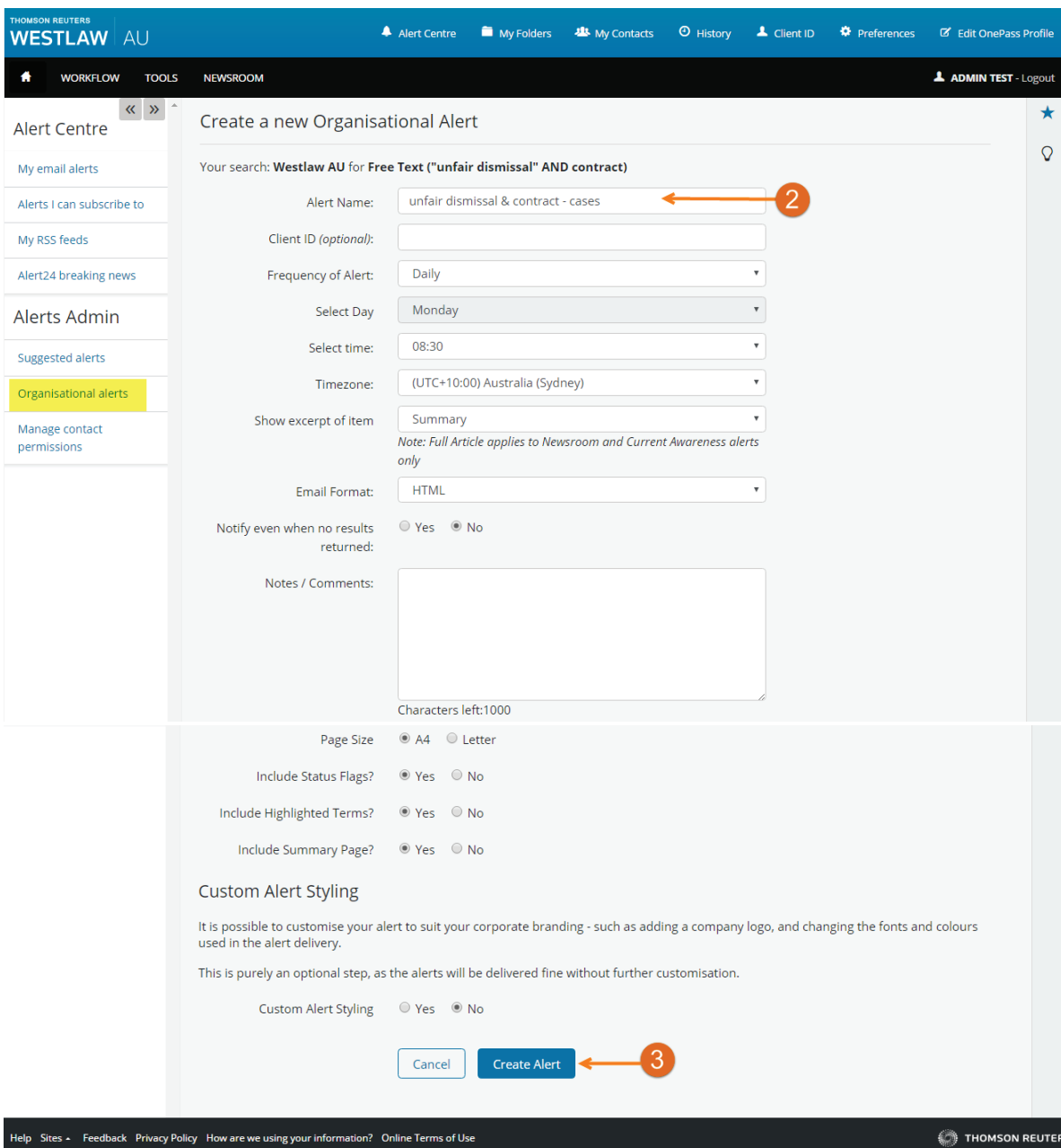
Administrator Features

Create an Organisational Alert

The  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 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**.



THOMSON REUTERS
WESTLAW AU

Alert Centre My Folders My Contacts History Client ID Preferences Edit OnePass Profile

WORKFLOW TOOLS NEWSROOM ADMIN TEST - Logout

Create a new Organisational Alert

Your search: **Westlaw AU for Free Text ("unfair dismissal" AND contract)**

Alert Name: unfair dismissal & contract - cases

Client ID (optional):

Frequency of Alert: Daily

Select Day: Monday

Selected time: 08:30

Timezone: (UTC+10:00) Australia (Sydney)

Show excerpt of Item: Summary

Note: Full Article applies to Newsroom and Current Awareness alerts only

Email Format: HTML

Notify even when no results returned: Yes No

Notes / Comments:

Characters left:1000

Page Size: A4 Letter

Include Status Flags? Yes No

Include Highlighted Terms? Yes No

Include Summary Page? Yes No

Custom Alert Styling

It is possible to customise your alert to suit your corporate branding - such as adding a company logo, and changing the fonts and colours used in the alert delivery.

This is purely an optional step, as the alerts will be delivered fine without further customisation.

Custom Alert Styling: Yes No

Cancel Create Alert

Help Sites Feedback Privacy Policy How are we using your information? Online Terms of Use THOMSON REUTERS

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


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.

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.

The screenshot shows the Westlaw AU Alert Centre interface. The main content area is titled 'My Email Alerts' and contains a table of alerts. The table has columns for Alert Type, Alert Name, Clientid, Frequency, Actions, and Date Created. Two alerts are listed, both with the name '"human rights" news & current awareness' and a frequency of 'Daily'. The 'Notes' checkbox in the 'Show / Hide' menu is highlighted with a red box. An orange arrow points from the 'Show / Hide' button to the menu.

Alert Type	Alert Name	Clientid	Frequency	Actions	Date Created
Individual	"human rights" news & current awareness		Daily	[Icons]	27/11/2015
Organisational	"human rights" news & current awareness		Daily	[Icons]	27/11/2015

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.

Notify even when no results returned: Yes No

Notes / Comments:

Enter the text of the note here.

The note will appear in the Notes column when you click Alert Centre and display My Email Alerts.


Characters left:867

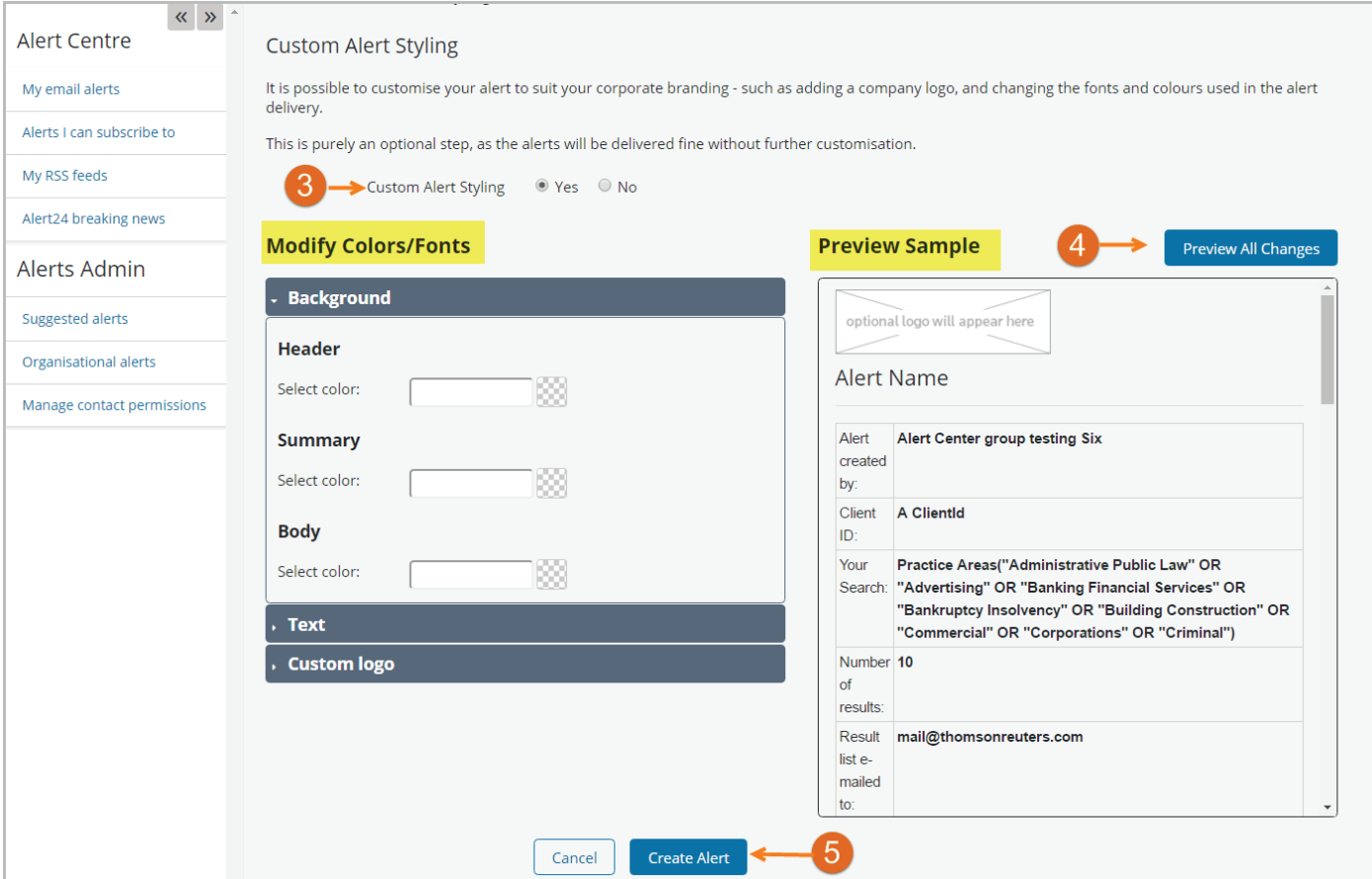
Tip: Notes are displayed internally only they are not published with the email alert.

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**.



Alert Centre

My email alerts
Alerts I can subscribe to
My RSS feeds
Alert24 breaking news
Alerts Admin
Suggested alerts
Organisational alerts
Manage contact permissions

Custom Alert Styling


It is possible to customise your alert to suit your corporate branding - such as adding a company logo, and changing the fonts and colours used in the alert delivery.


This is purely an optional step, as the alerts will be delivered fine without further customisation.


3 → Custom Alert Styling Yes No

Modify Colors/Fonts

Background

Header
Select color: 

Summary
Select color: 

Body
Select color: 

Text

Custom logo

Preview Sample 4 → **Preview All Changes**

optional logo will appear here

Alert Name

Alert created by:	Alert Center group testing Six
Client ID:	A ClientId
Your Search:	Practice Areas("Administrative Public Law" OR "Advertising" OR "Banking Financial Services" OR "Bankruptcy Insolvency" OR "Building Construction" OR "Commercial" OR "Corporations" OR "Criminal")
Number of results:	10
Result list e-mailed to:	mail@thomsonreuters.com

Cancel **Create Alert** 5

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.

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**.

The screenshot shows the Alert Centre interface. The top navigation bar includes 'Alert Centre', 'My Folders', 'My Contacts', 'History', 'Client ID', 'Preferences', and 'Edit OnePass Profile'. The left sidebar has 'Alerts Admin' with 'Suggested alerts' selected. The main area displays a table of suggested alerts:

Alert Name	Create Org Alert?	Frequency	Date Created
"human rights" news & current awareness	Accept Reject	DAILY	27/11/2015
stop bullying	Accept Reject	DAILY	14/11/2016

Numbered callouts: 1 points to the 'Alert Centre' link in the top navigation; 2 points to the 'Suggested alerts' link in the left sidebar; 3 points to the 'Accept' button in the table.

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**

Organisational Alerts - Edit Members

"human rights" news & current awareness(S)

Allow All Users to Subscribe

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.*

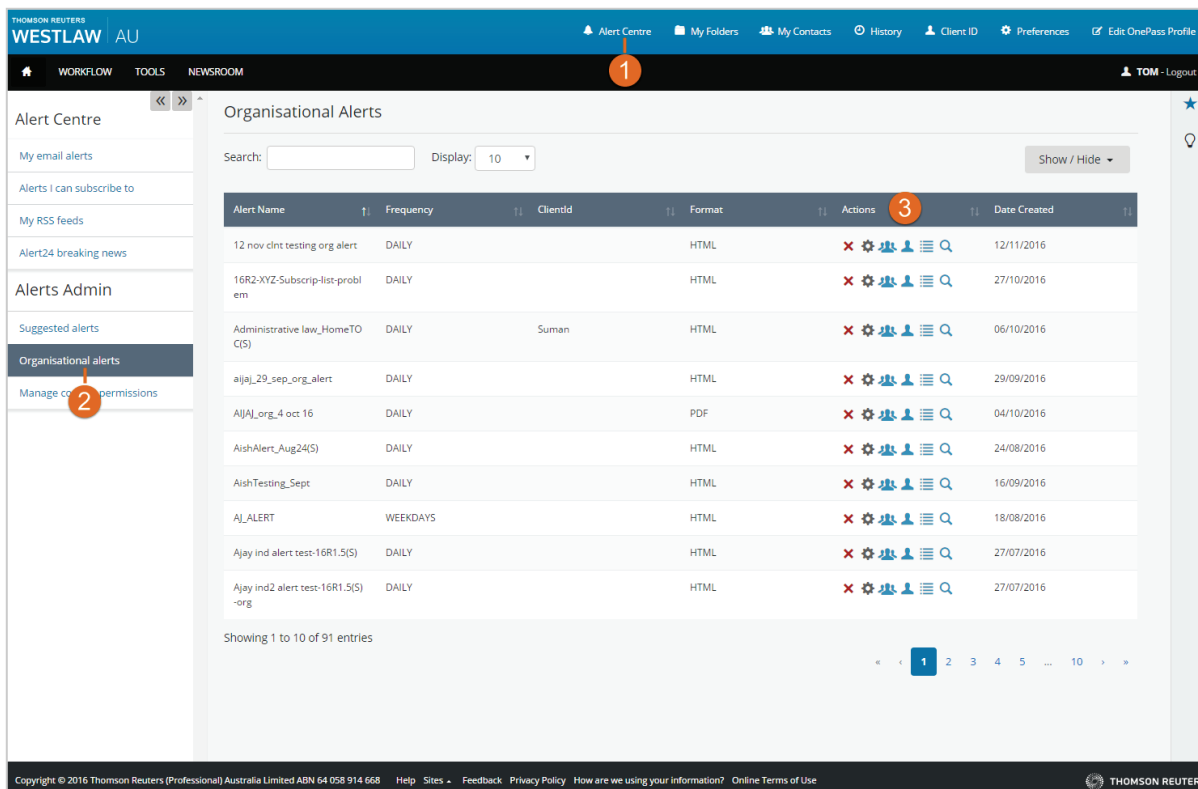
Edit Alert Settings

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.



The screenshot shows the Thomson Reuters Alert Centre interface. The top navigation bar includes 'Alert Centre', 'My Folders', 'My Contacts', 'History', 'Client ID', 'Preferences', and 'Edit OnePass Profile'. The left sidebar has 'Alert Centre' and 'Alerts Admin' sections. Under 'Alerts Admin', 'Organisational alerts' is selected, and 'Manage permissions' is highlighted with a red circle and the number 2. The main content area is titled 'Organisational Alerts' and features a search bar and a table of alerts. The table has columns for 'Alert Name', 'Frequency', 'Clientid', 'Format', 'Actions', and 'Date Created'. The 'Actions' column header is highlighted with a red circle and the number 3. The table lists several alerts, including '12 nov clnt testing org alert', '16R2-XYZ-Subscrip-list-probl em', 'Administrative law_HomeTO C(S)', 'aijai_29_sep_org_alert', 'AIJAI_org_4 oct.16', 'AishAlert_Aug24(S)', 'AishTesting_Sept', 'AJ_ALERT', 'Ajay ind alert test-16R1.5(S)', and 'Ajay ind2 alert test-16R1.5(S) -org'. The footer contains copyright information and links for Help, Sites, Feedback, Privacy Policy, and Online Terms of Use.

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.

User name	Is Admin?	Is Delegate?	Aggregated Alert?	Breaking News?	Delegate Actions	Breaking News Actions
[ADMIN] Ben Norman	✓	✓	⊗	⊗	n/a	Subscribe
A ANSUMON INTERNAL	⊗	⊗	⊗	⊗	Assign	Subscribe
A/C ADMIN Helen Woodman	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Marion Randall	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Mary Dossis	✓	⊗	⊗	⊗	n/a	Subscribe
A/C ADMIN Mercedes Bertus	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Rachael Albert	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Helen Woodman	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Marion Randall	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Mary Dossis	✓	✓	⊗	⊗	n/a	Subscribe

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.

User name	Is Admin?	Is Delegate?	Aggregated Alert?	Breaking News?	Delegate Actions	Breaking News Actions
[ADMIN] Ben Norman	✓	✓	⊗	⊗	n/a	Subscribe
A ANSUMON INTERNAL	⊗	⊗	⊗	⊗	Assign	Subscribe
A/C ADMIN Helen Woodman	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Marion Randall	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Mary Dossis	✓	⊗	⊗	⊗	n/a	Subscribe
A/C ADMIN Mercedes Bertus	✓	✓	⊗	⊗	n/a	Subscribe
A/C ADMIN Rachael Albert	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Helen Woodman	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Marion Randall	✓	✓	⊗	⊗	n/a	Subscribe
A/C DELEGATE Mary Dossis	✓	✓	⊗	⊗	n/a	Subscribe

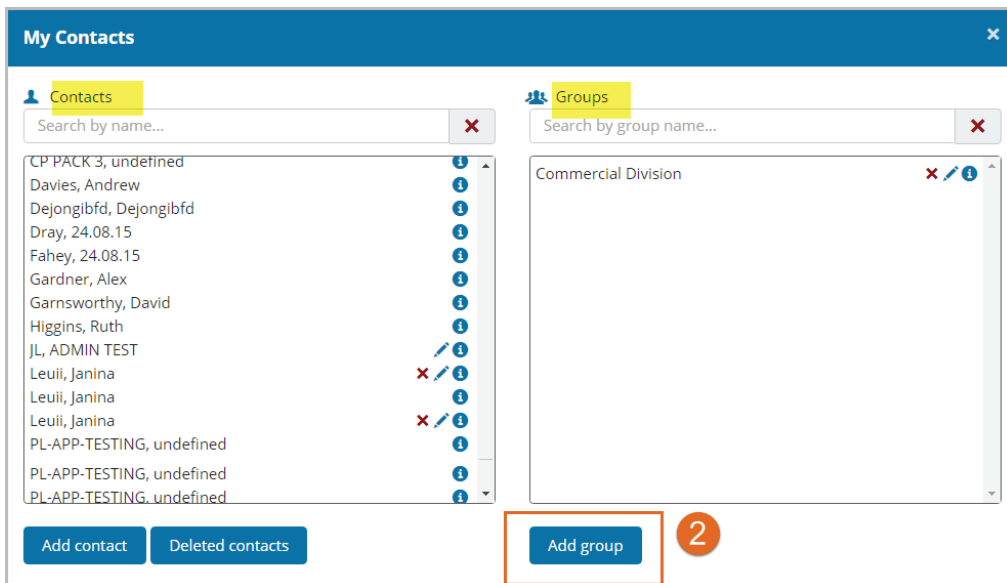
Individual User Features

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.

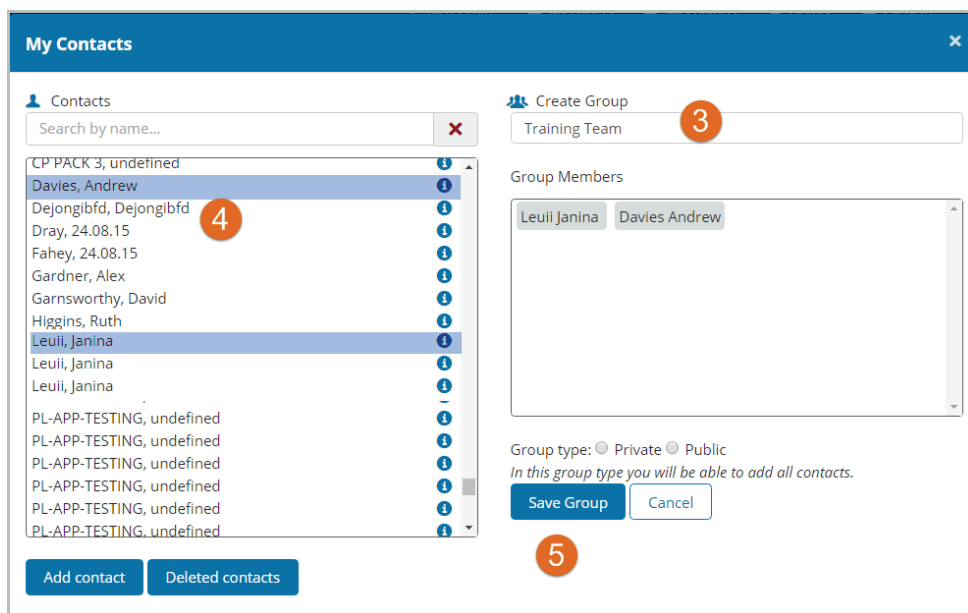
My Contacts

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.




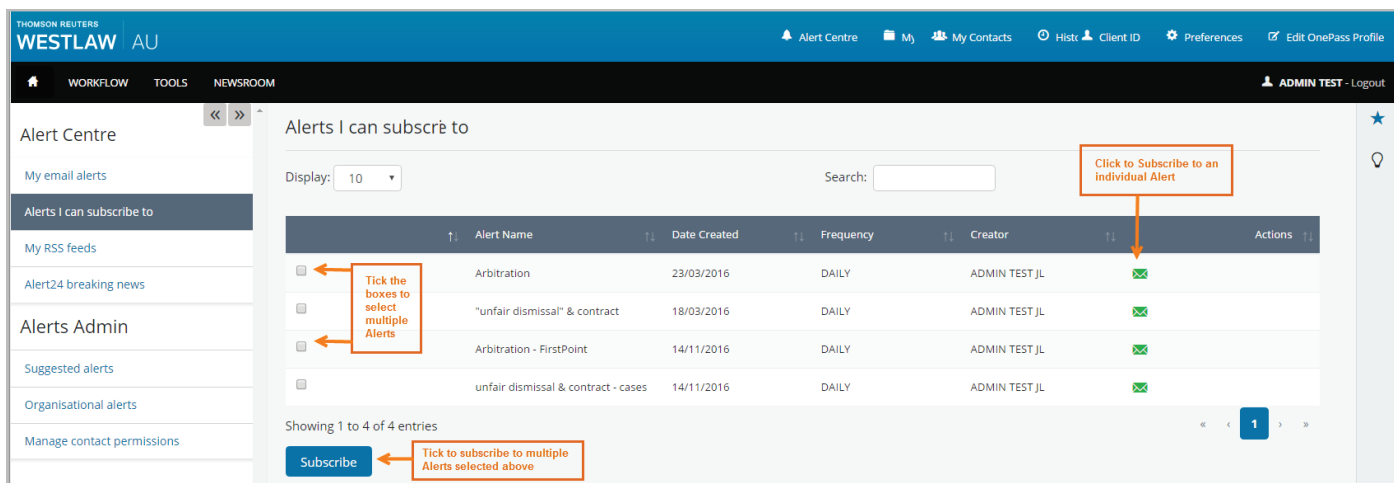
Tip: Private is only viewable to the user who created it. Public is available to everyone in your organisation.

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.




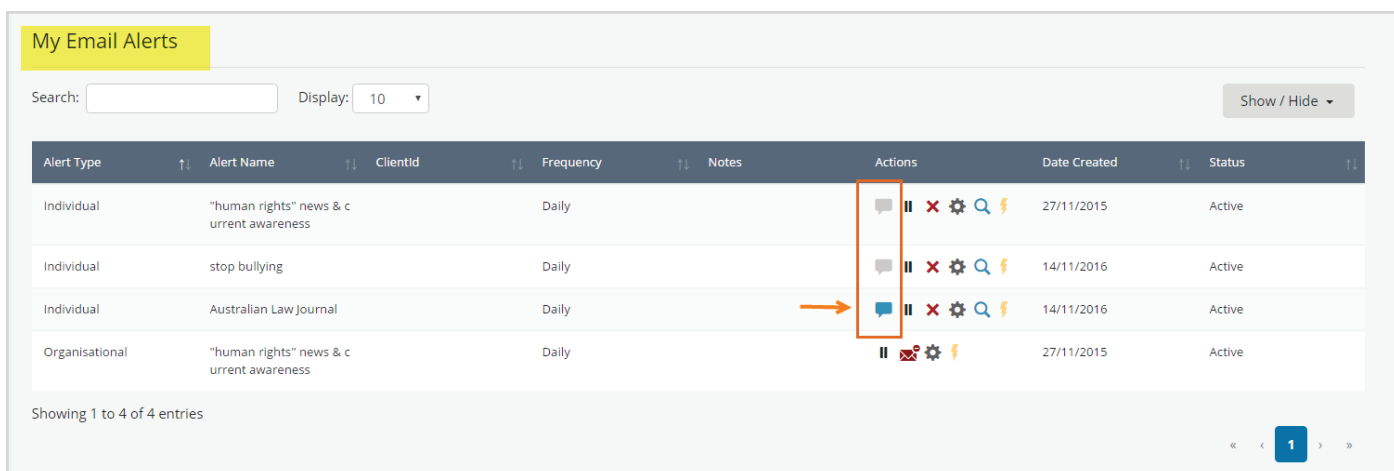
The screenshot shows the 'Alert Centre' interface. On the left, there is a navigation menu with 'Alerts I can subscribe to' selected. The main area displays a table of alerts with columns for Alert Name, Date Created, Frequency, Creator, and Actions. A 'Subscribe' button is located at the bottom left of the table. Annotations include: 'Click to Subscribe to an individual Alert' pointing to a green checkmark in the Actions column; 'Tick the boxes to select multiple Alerts' pointing to checkboxes in the first column; and 'Tick to subscribe to multiple Alerts selected above' pointing to the 'Subscribe' button.

Alert Name	Date Created	Frequency	Creator	Actions
Arbitration	23/03/2016	DAILY	ADMIN TEST JL	<input checked="" type="checkbox"/> 
"unfair dismissal" & contract	18/03/2016	DAILY	ADMIN TEST JL	<input checked="" type="checkbox"/> 
Arbitration - FirstPoint	14/11/2016	DAILY	ADMIN TEST JL	<input checked="" type="checkbox"/> 
unfair dismissal & contract - cases	14/11/2016	DAILY	ADMIN TEST JL	<input checked="" type="checkbox"/> 























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.



The screenshot shows the 'My Email Alerts' page. It features a search bar, a display count of 10, and a 'Show / Hide' dropdown. The main area displays a table of alerts with columns for Alert Type, Alert Name, Clientid, Frequency, Notes, Actions, Date Created, and Status. A 'Share Alert with Others' icon (a speech bubble) is highlighted in the Actions column of the third row.

Alert Type	Alert Name	Clientid	Frequency	Notes	Actions	Date Created	Status
Individual	"human rights" news & current awareness		Daily		     	27/11/2015	Active
Individual	stop bullying		Daily		     	14/11/2016	Active
Individual	Australian Law Journal		Daily		     	14/11/2016	Active
Organisational	"human rights" news & current awareness		Daily		   	27/11/2015	Active

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.

The screenshot shows the Thomson Reuters Alert Centre interface. The top navigation bar includes 'Alert Centre', 'My Folders', 'My Contacts', 'History', 'Client ID', 'Preferences', and 'Edit OnePass Profile'. The main content area is titled 'My Email Alerts' and contains a question: 'Would you like to receive all your organisational alerts in one email?' with a 'Consolidate Org. Alerts' button highlighted in yellow and a red circle with the number '2' next to it. Below this is a search bar and a 'Display: 10' dropdown. A table lists several alerts with columns for Alert Type, Alert Name, Frequency, Actions, Date Created, and Status. The table shows six entries, including individual and organisational alerts for topics like 'human rights' news, stop bullying, and Australian Law Journal. At the bottom of the table, it says 'Showing 1 to 6 of 6 entries'.

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**.

The screenshot shows the 'Consolidate your Alerts' form. It includes the following fields and options:

- E-mail Address:** A text input field containing 'janina.leuii@thomsonreuters.com' with a red asterisk to its right. Below the field is the text 'Separate multiple addresses with semicolons.'
- File Format:** A dropdown menu set to 'HTML'.
- Notify if no results returned?:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Choose a Frequency:** A dropdown menu set to 'Daily', with a red circle containing the number '3' next to it.
- Select time:** A dropdown menu set to '08:30'.
- Timezone:** A dropdown menu set to '(UTC+10:00) Australia (Sydney)'.
- Buttons:** 'Cancel' and 'Save Alert' buttons. The 'Save Alert' button has a red circle containing the number '4' next to it.