WestlawNext®

Using the Alert Management Center on WestlawNext

Contents

WestlawNext is available on the Web at **next.westlaw.com**.

For assistance using WestlawNext, call (1-800-020-548).

For free reference materials, visit **legalsolutions. thomsonreuters.com/ guides.**

Overview

The Alert Management Center on WestlawNext® makes it easy to manage your entire organization's alerts on WestlawNext. Alert Management Center is fully integrated with Alerts on WestlawNext and offers enhanced alert and newsletter functionality.

Accessing the Alert Management Center

To access the Alert Management Center, click **Alerts** in the upper-right corner of the WestlawNext home page (Figure 1). The Alert Management Center is displayed (Figure 2 on next page).

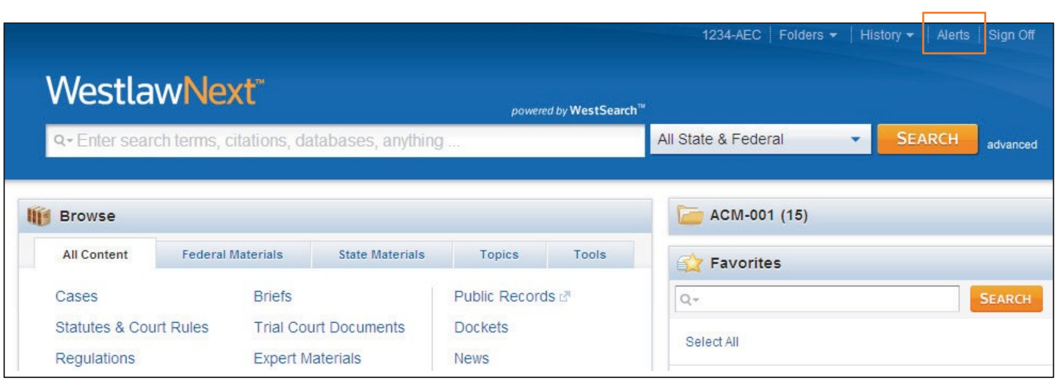


Figure 1. Accessing the Alert Management Center

Browsing the Alert Management Center

The Alert Management Center provides a single interface for creating and managing all of your organization's alerts (Figure 2).

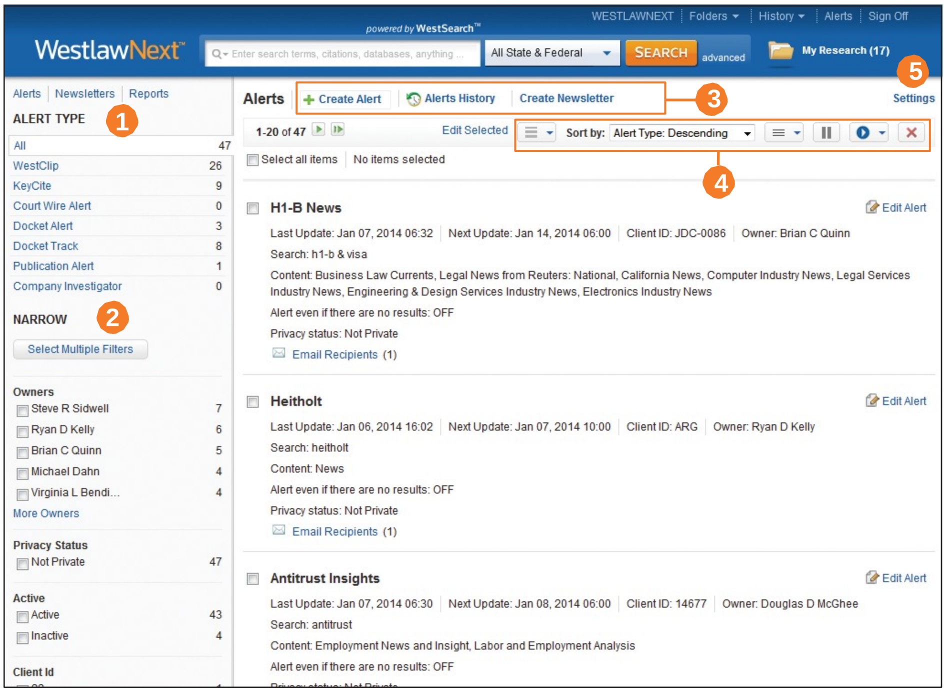


Figure 2. Alert Management Center

From this page, you can do any of the following:

1. To view organization alerts by type, click a category under *Alert Type* in the left column. Each alert type shows the number of alerts it contains.
2. Narrow your alerts by selecting one or more filters under *Narrow* in the left column. Available filters include owners, privacy status, active or inactive status, client ID, recipients, and categories.
3. Use the links at the top of the page to create a organization-wide alert or an alert on behalf of an individual, view alert history, or create a organization-wide newsletter.
4. Customize your display using the buttons on the toolbar. You can change the display from list view to grid view, sort the list, choose the level of detail, pause an alert and then resume running it, manually run an alert to see its results immediately, and delete an alert.
5. Use Settings to add custom logos for alerts and newsletters; allow individual users to create private alerts; activate seamless authentication so users can view alerts without signing on to WestlawNext; set a default reply email address for alerts; and receive a dynamically created list of your active administrative RSS feeds.

Creating an Organization-Owned Alert

To create an alert, complete these steps:

1. Click **Create Alert** and select an alert type from the drop-down list, e.g., **Publication Alert** (Figure 3).

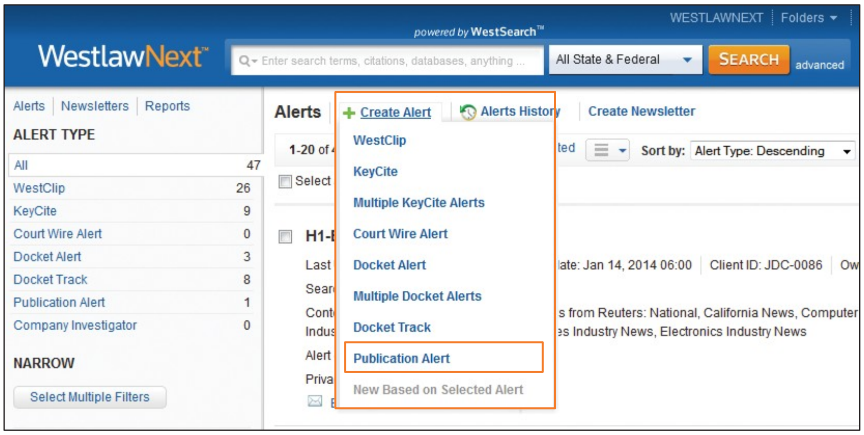


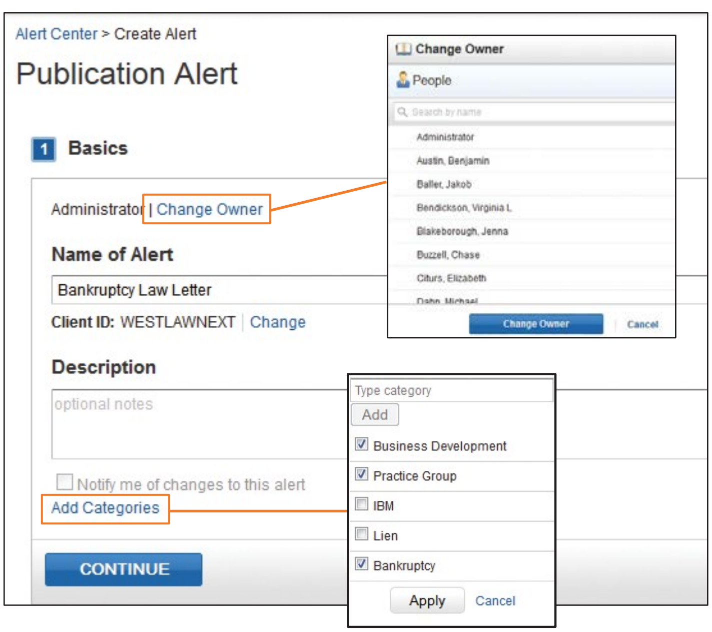
Figure 3. Selecting an alert type

2. The Publication Alert page, which is divided into four steps, is displayed. In *Step 1 Basics* (Figure 4), enter a name for the alert. If desired, change the default client ID and add a description.

   Notes In addition to creating a organization-wide alert, you have the option to create an alert on behalf of another individual. Click **Change Owner**, select a name in the displayed list of people, and click **Change Owner** again.

   Add category tags to your alert to help you precisely organize your alerts. Click **Add Categories** to display a list of existing categories. Select the check box for one or more categories and click **Apply**. To add a new category, type its name in the box and click **Add**.

   When you have finished making your selections, click **Continue**. Note that the process for creating an alert is similar for each type of alert.



Click **Change Owner** to create an alert on behalf of an individual in your organization.

Click **Add Categories** to add a category tag to your alert.

Figure 4. Step 1 Basics

3. In *Step 2* (Figure 5), you select the content you want to search in. Click a tab, e.g., **Federal Materials**, to display a specific type of content. When you've identified the content you want, click **Add**. Your selections are displayed in the right column under *Your Selections*. Click **Continue**.

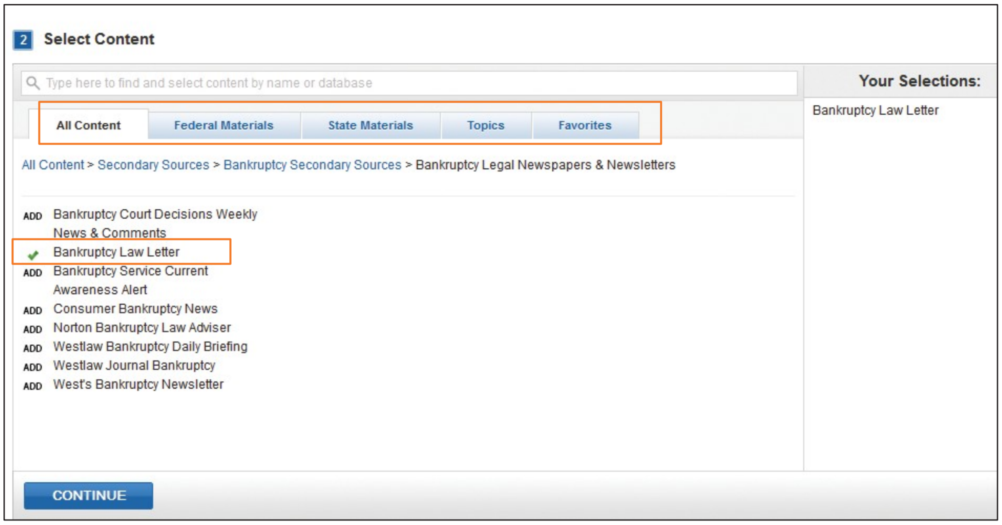
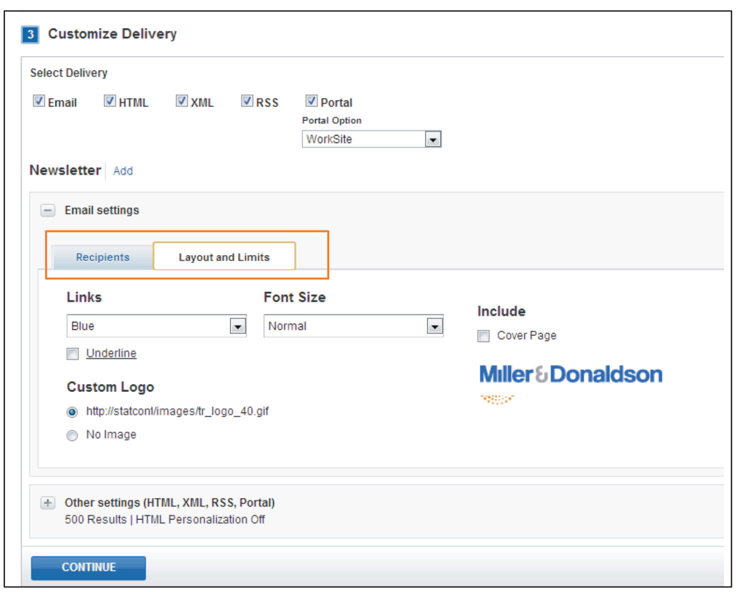


Figure 5. Step 2 Select Content

4. In *Step 3* (Figure 6), select a delivery method, e.g., **Email**, **HTML**, **XML**, **RSS**, or **Portal**, and select the settings for that method. To add this alert to one or more existing newsletters, click **Add** and select the newsletter. On the Layouts and Limits tab, select your desired settings. If you previously designated a custom logo under *Settings* on the Alert Management Center page, you can choose whether to display it on the alert result.



Choose to display a custom logo on the alert result.

Figure 6. Step 3 Customize Delivery – Layout and Limits

5. Enter the recipients for the alert on the Recipients tab (Figure 6a). You can also enter a Sponsor ID which allows the alert recipients to view alert results without signing into WestlawNext. Click **Continue**.

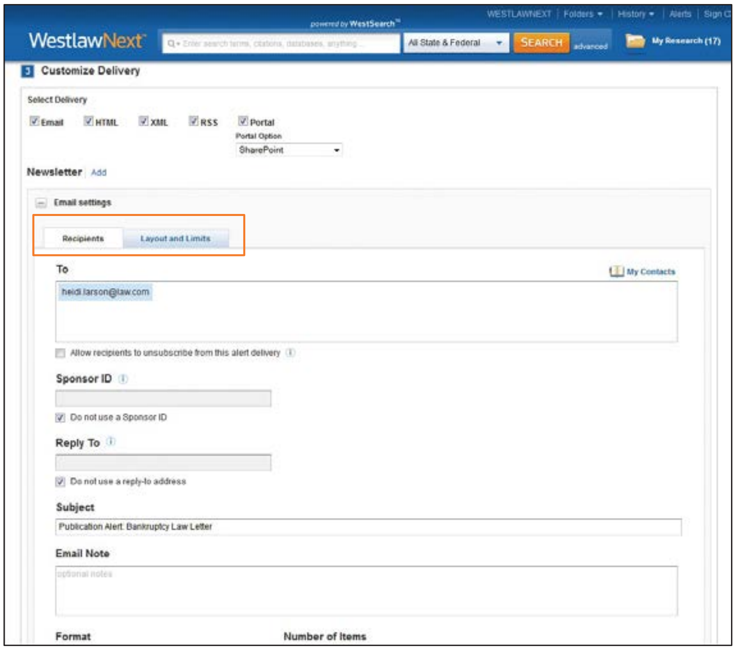


Figure 6a. Step 3 Customize Delivery – Recipients Tab

6. In *Step 4* (Figure 7), you can set the frequency for the alert and select the time zone and time of day the alert will run. You can also select whether you want to be notified when there are no results.

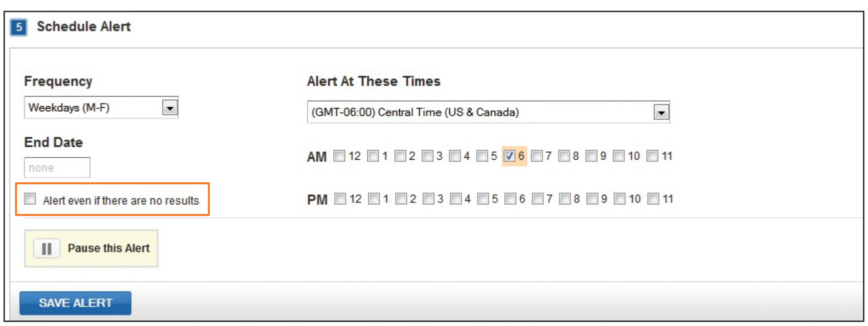


Figure 7. Step 4 Schedule Alert

7. Click **Save Alert**. A confirmation message will appear. The alert details will appear on the alerts home page.

Creating Multiple Alerts

Creating Multiple Docket Alerts

As an administrator, you can create multiple docket alerts by uploading a .csv file. Follow these steps:

1. Click **Create Alert** and select **Multiple Docket Alerts** from the drop-down list (Figure 3 on page 3).
2. The Create Multiple Docket Alerts page is divided into five steps. In *Step 1 Upload File* (Figure 8), click **Choose File** to upload an existing .csv file or choose to download a .csv template.

   When you have finished making your selections, click **Continue**.

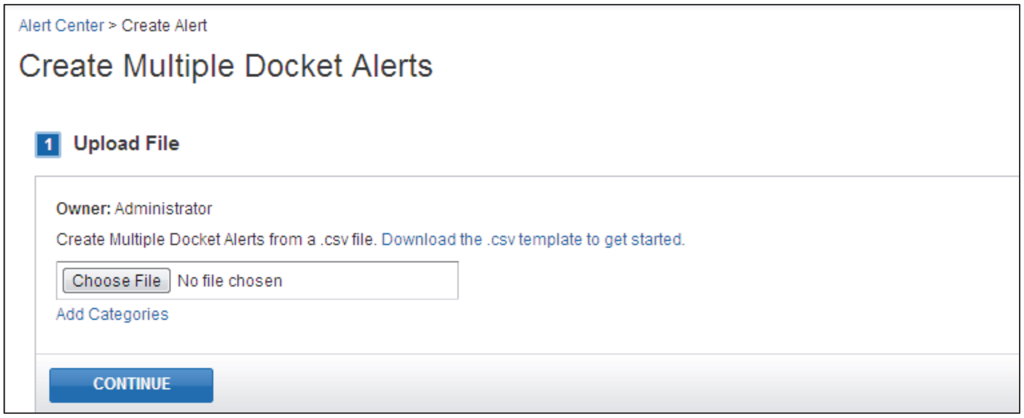


Figure 8. Step 1 Upload File

3. Follow steps 1 through 5 to finish your Docket Alert. Click **Continue** to move from step to step. When you have finished making your selections, click **Save Alert**.

Creating Multiple KeyCite Alerts

As an administrator, you can create multiple KeyCite® alerts by uploading a .csv file. Follow these steps:

1. Click **Create Alert** and select **Multiple KeyCite Alerts** from the drop-down list (Figure 3 on page 3).
2. You can create a Multiple KeyCite Alerts page in five easy steps. In *Step 1* (Figure 9), click **Choose File** to upload an existing .csv file or choose to download a .csv template.

   When you have finished making your selections, click **Continue**.

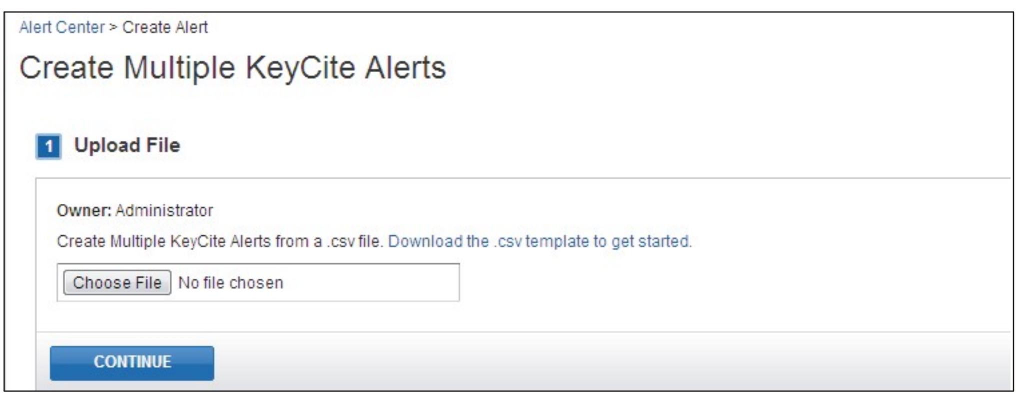


Figure 9. Step 1 Upload File

3. Follow steps 1 through 5 to finish your Docket Alert. Click **Continue** to move from step to step. When you have finished making your selections, click **Save Alert**.

Editing Multiple Alerts

The Alert Management Center streamlines management of your organization's alerts by allowing you to edit multiple alerts at once. To edit multiple alerts, complete these steps:

1. First select the alerts you want to edit using the filters under *Narrow* in the left column. For example, to view just the alerts for a particular alert owner, select the check box for that owner. Then click **Apply Filters**. The list of filtered alerts is displayed (Figure 10).

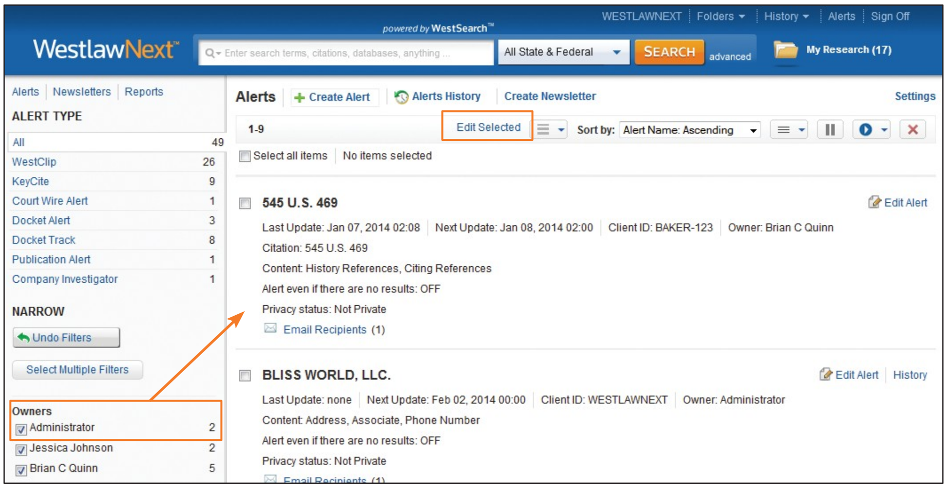


Figure 10. List of filtered alerts

2. Select the check boxes for the alerts you wish to edit. To edit all alerts in the list, check the **Select all items** box at the top of the page.
3. Click **Edit Selected** on the toolbar. The Edit Selected Alerts dialog box is displayed (Figure 11). Edit your alerts as desired and click **Save**.

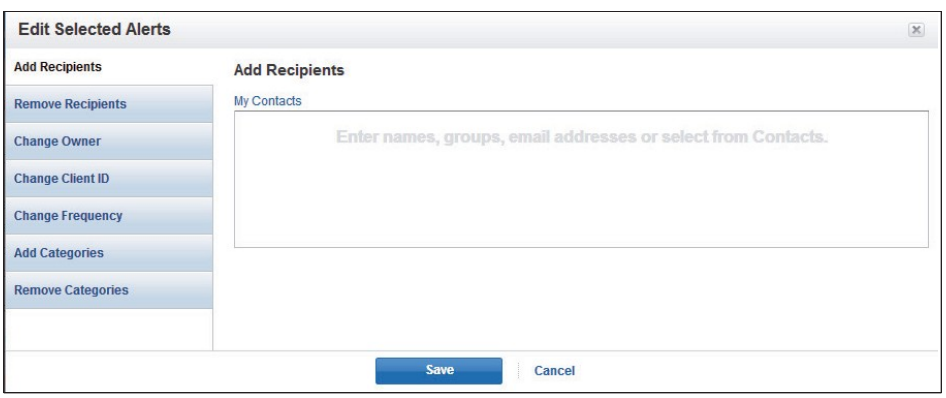


Figure 11. Edit Selected Alerts dialog box

Managing Alerts

You can view and edit your organization's alerts. This feature ensures that your users are getting the information they need, as efficiently as possible.

> **Note** Any private alerts will not be able to be edited by the administrator.

To edit an alert, complete these steps:

1. Click **Edit Alert** next to the alert in the alerts list (Figure 12).

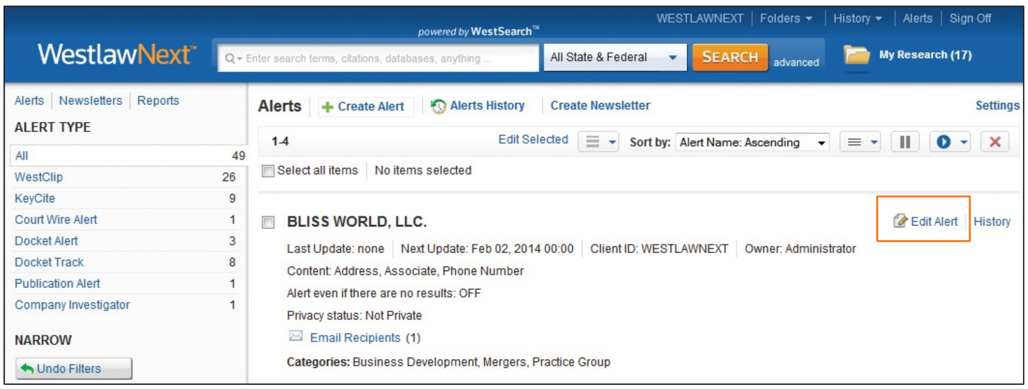


Figure 12. Edit Alert

2. The Edit Alert page for the alert is displayed (Figure 13). Click **Edit** to edit each section of the alert. When you have finished editing the alert, click **Save Alert**.

Figure 13. Edit Alert

Creating an Organization-Owned Newsletter

The Alert Management Center lets you create newsletters that compile results from multiple alerts. Use alerts newsletters to notify colleagues in your practice group of important new case law, quickly circulate the latest legislative or regulatory developments to in-house counsel, follow specific industry news as part of client development efforts, or stay current with trends in a particular practice area.

To create a newsletter, complete these steps:

1. Click **Create Newsletter** (Figure 14).

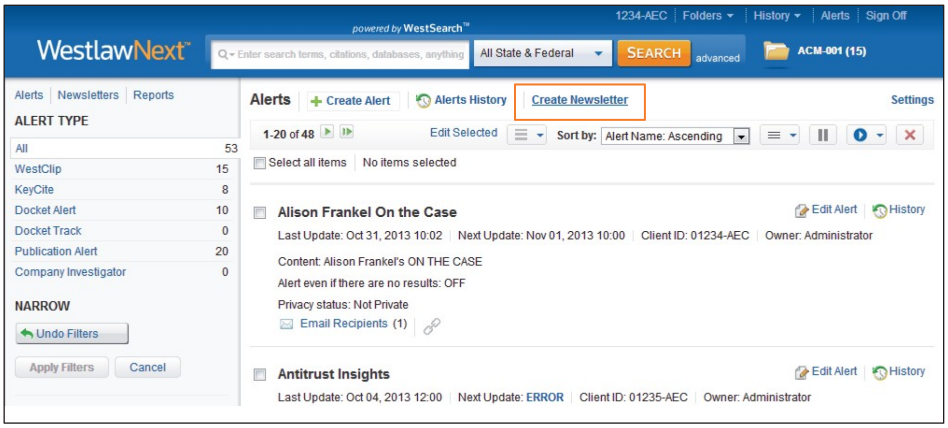


Figure 14. Creating a newsletter

2. The Alert Newsletter page, which is divided into four steps, is displayed. In the *Basics* step (Figure 15), enter a name for the newsletter and an optional description. Click **Continue**.

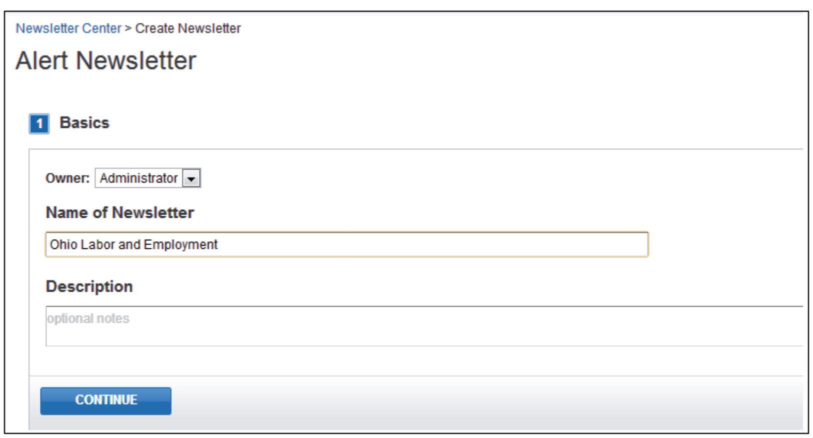


Figure 15. Step 1 Basics

3. In *Step 2* (Figure 16), click **Add** next to each alert you want to include in the newsletter. Your selections are displayed in the right column under *Your Selections*. Click **Continue**.

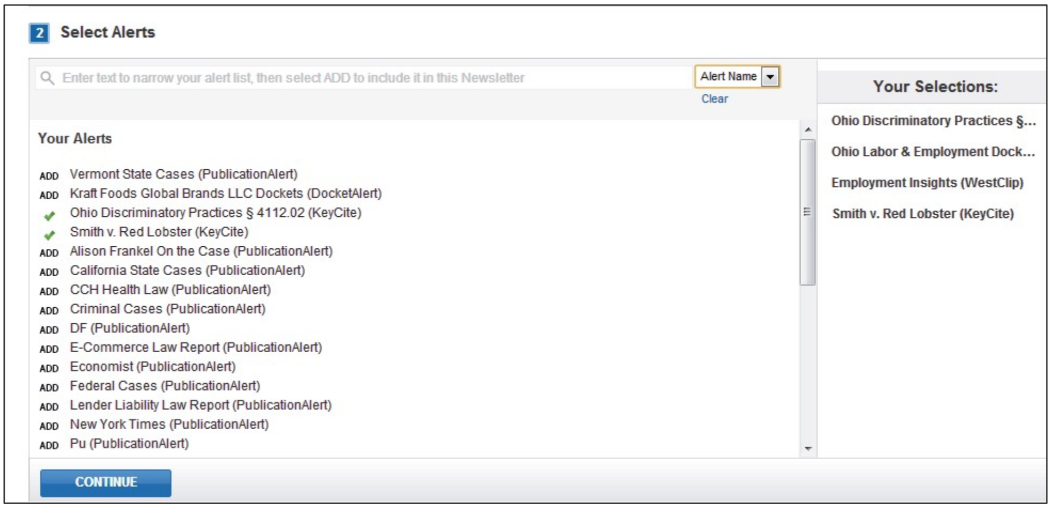
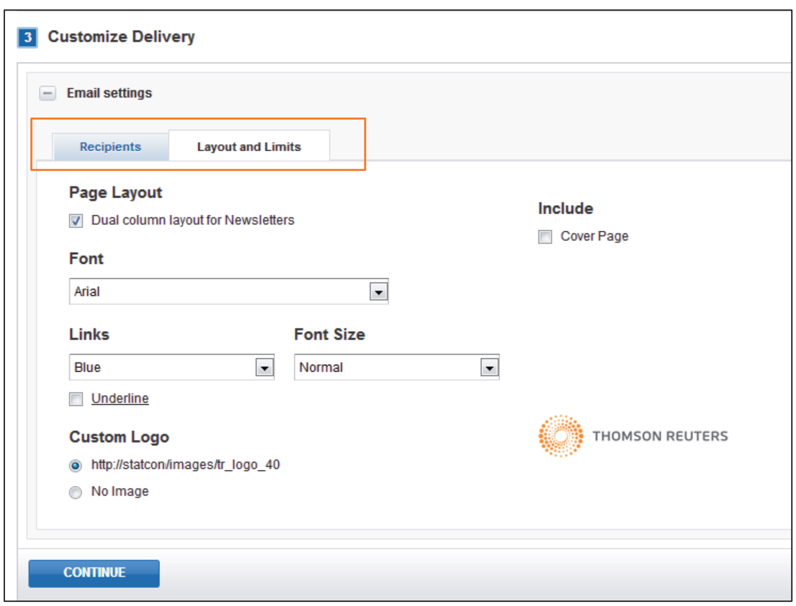


Figure 16. Step 2 Select Alerts

4. In *Step 3* (Figure 17), enter the recipients for the newsletter on the Recipients tab. On the Layouts and Limits tab, select your desired settings, including dual-column format, if desired. If you previously designated a custom logo under *Settings* on the Alert Management Center page, you can choose whether to display it on the newsletter. Click **Continue**.



Choose to display a custom logo on the newsletter.

Figure 17. Step 3 Customize Delivery

5. In *Step 4* (Figure 18), set the frequency for the newsletter and select the time zone and time of day the newsletter will run and whether you want to be notified when there are no results.

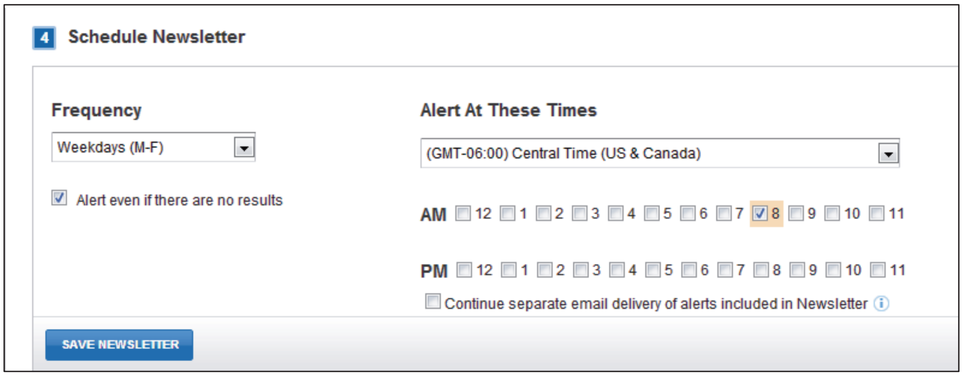


Figure 18. Step 4 Schedule Newsletter

6. Click **Save Newsletter**. A confirmation message and the new newsletter are displayed on the Newsletters page.

Creating an Alert Summary Report

Alert summary reports provide a custom snapshot that helps you efficiently monitor your organization's alerts. Usage statistics let you determine who is creating what type of alert and what content they are alerting. You can also verify that individual alerts are set up properly to deliver the desired result and check for alert redundancies across the organization.

To create a report, complete these steps:

1. Click **Reports** in the left column of the Alert Management Center.
2. The Reports page is displayed (Figure 19). Click **Create Report**.

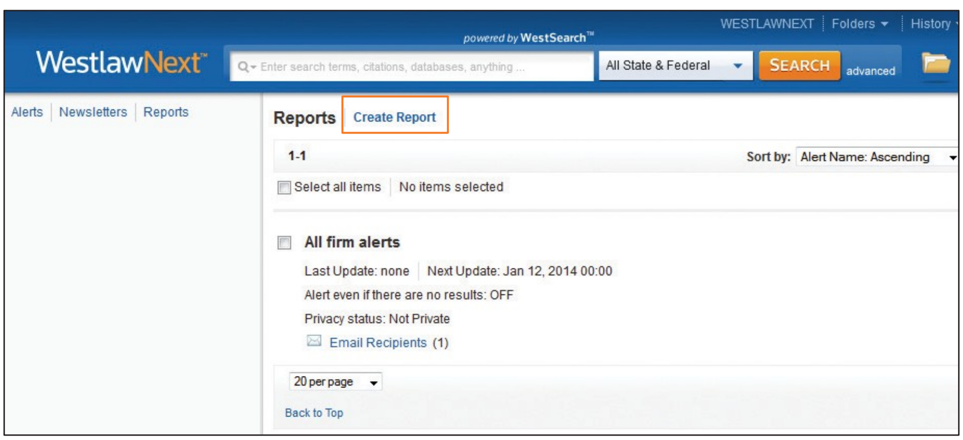


Figure 19. Creating a report

3. The Alert Summary Report page, which is divided into four steps, is displayed. In the *Basics* step (Figure 20), enter a name for the report and an optional description. Click **Continue**.

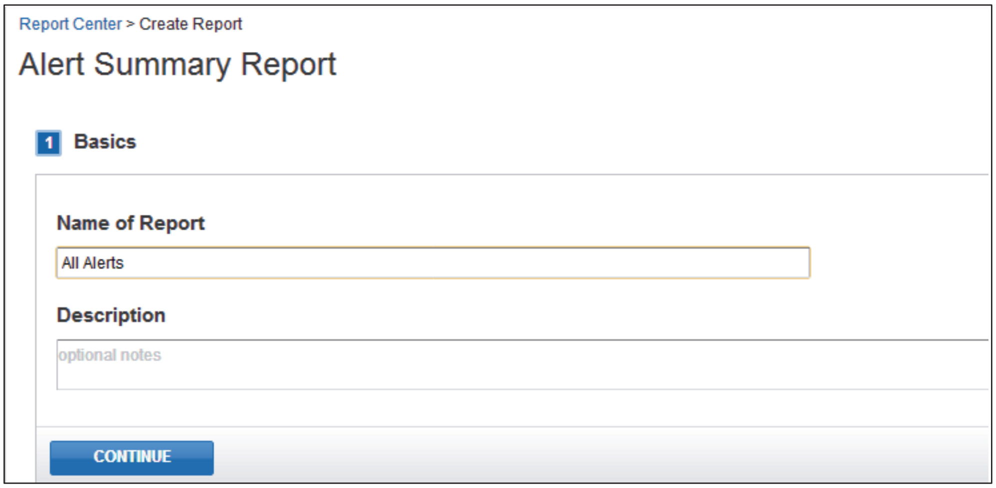


Figure 20. Step 1 Basics

4. In *Step 2* (Figure 21), select the check boxes for the alert types you want to include in the report. Choose whether you want to include only active alerts or all alerts. Click **Continue**.

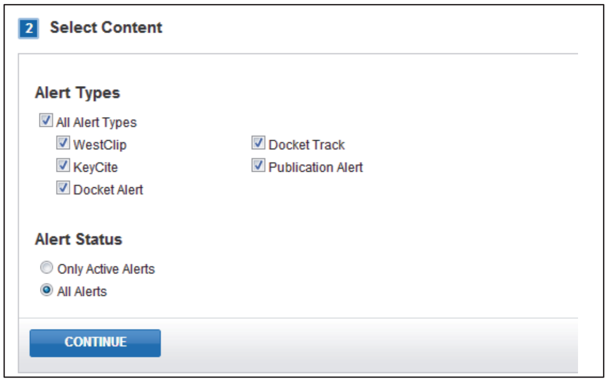


Figure 21. Step 2 Select Content

5. In *Step 3* (Figure 22), enter the recipients for the report on the Recipients tab. Edit the default *Subject* line, if desired, and add an optional email note. Click **Continue**.

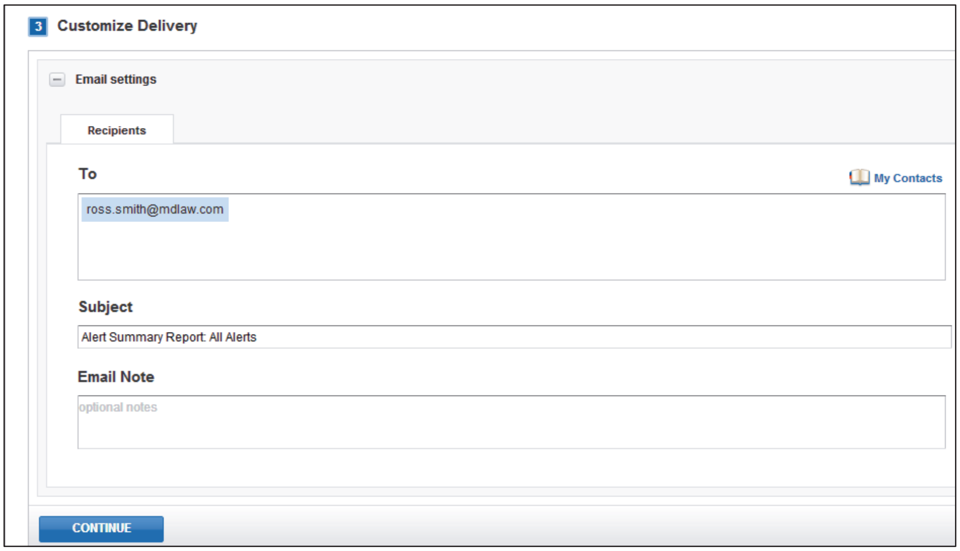


Figure 22. Step 3 Customize Delivery

6. In *Step 4* (Figure 23), set the frequency for the report, and an end date, if desired. Select the time zone and time of day the report will run and whether you want to be notified when there are no results. Click Save Alert. A confirmation message is displayed and your report is added to the Reports page.

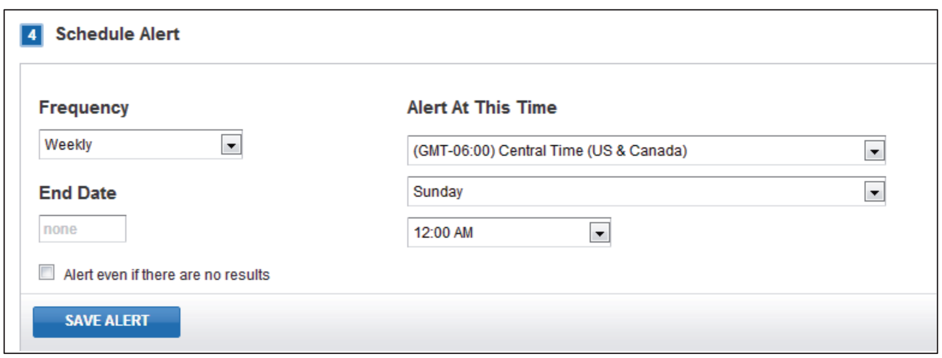


Figure 23. Step 4 Schedule Alert

Settings

The Settings page is where the alert administrator can add a customer logo, adjust alert privacy settings, manage seamless authentication, enter a reply-to address, and use OPML.

Custom Logo

Choose a PNG, JPEG, or GIF to appear at the top of delivered Alert results. The logo should be no more than 512KB. Work with your organization's IT department to host your logo. Then you can simply enter the URL where the logo is saved.

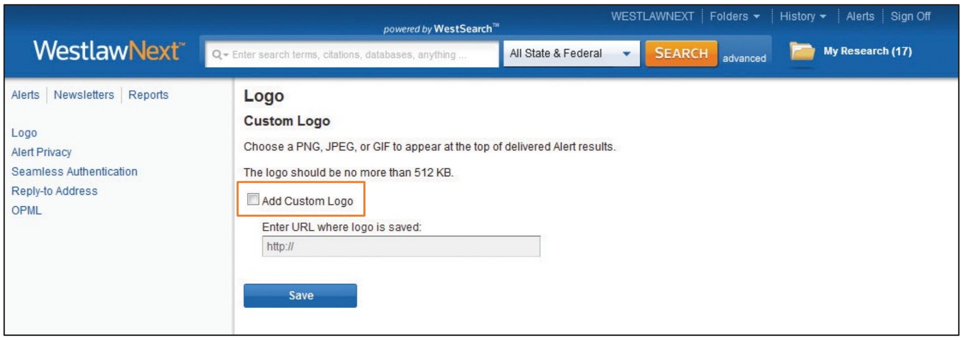


Figure 24. Custom Logo

Alert Privacy

You can allow all of your users to create private alerts, or you can select one or more users who can create private alerts. If you do not select any individuals, no users are allowed to create private alerts.

Note If you allow users to create private alerts you will not be able to view or edit those private alerts.

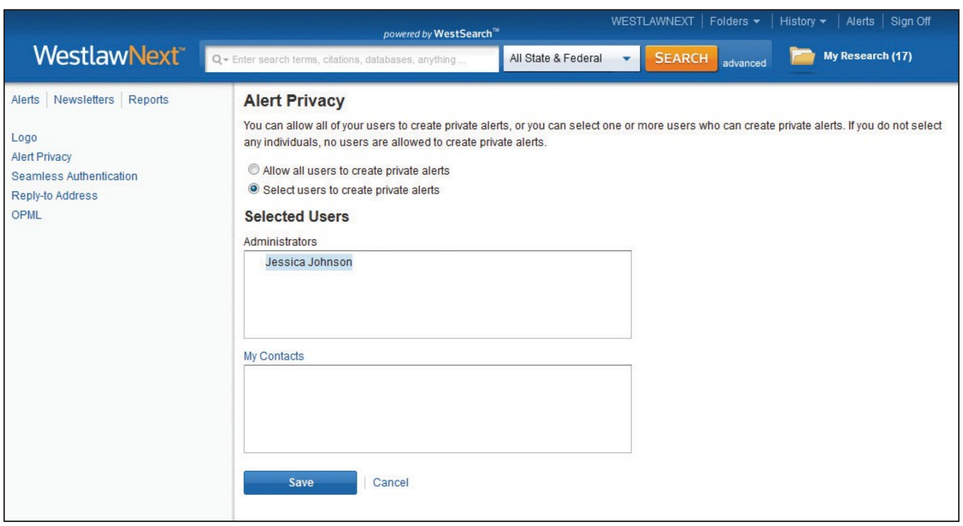


Figure 25. Alert Privacy

Seamless Authentication

You can set a sponsor ID to allow recipients to seamlessly access full-text documents from your alert results without signing into WestlawNext.

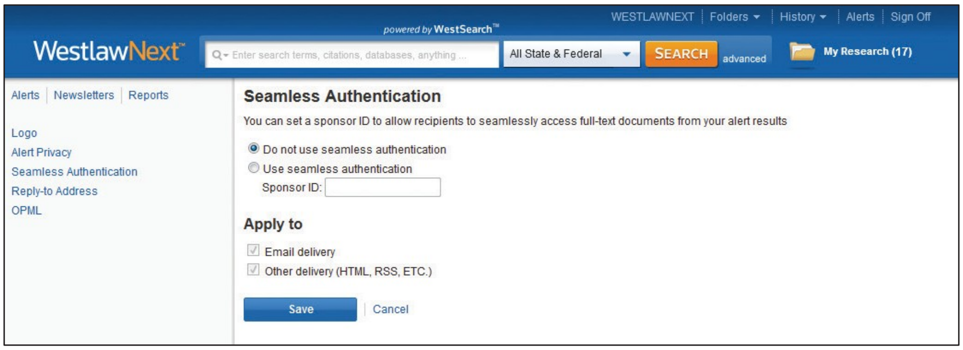


Figure 26. Seamless Authentication

Reply-to Address

You can set a default reply-to address for alerts so if a recipient replies to the alert you can ensure that the reply will go to the desired email address.

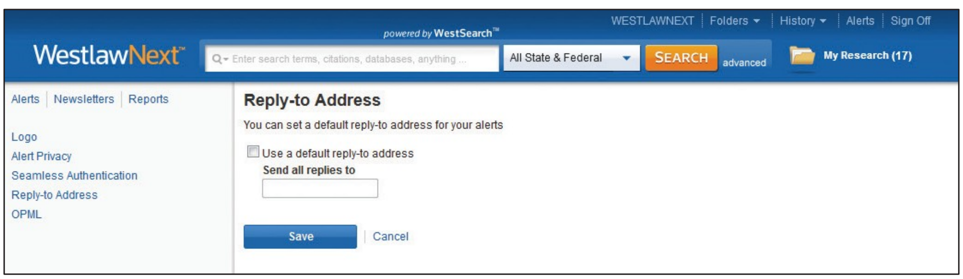


Figure 27. Reply-to Address

OPML

Paste the desired URL. Contact your IT department for assistance with OPML.

Published 1/14. L-389322.

THOMSON REUTERS™