

# WestlawNext®

## Using the Alert Management Center on WestlawNext

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WestlawNext is available on the Web at [next.westlaw.com](http://next.westlaw.com).

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

For free reference materials, visit [legalsolutions.thomsonreuters.com/guides](http://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).

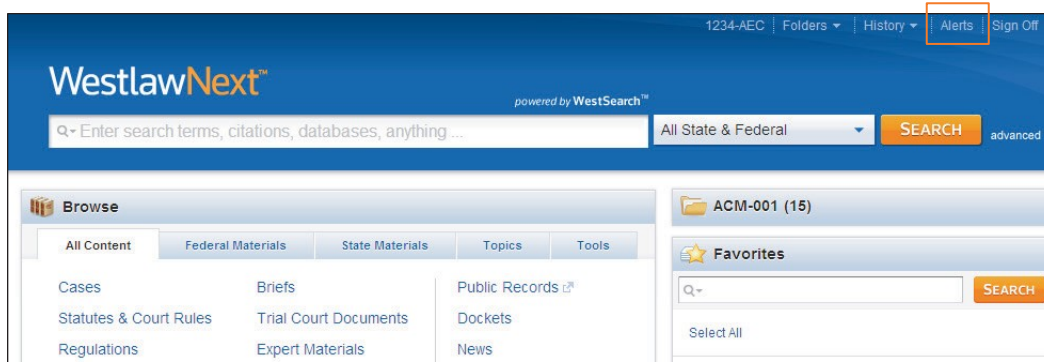


Figure 1. Accessing the Alert Management Center



## 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).

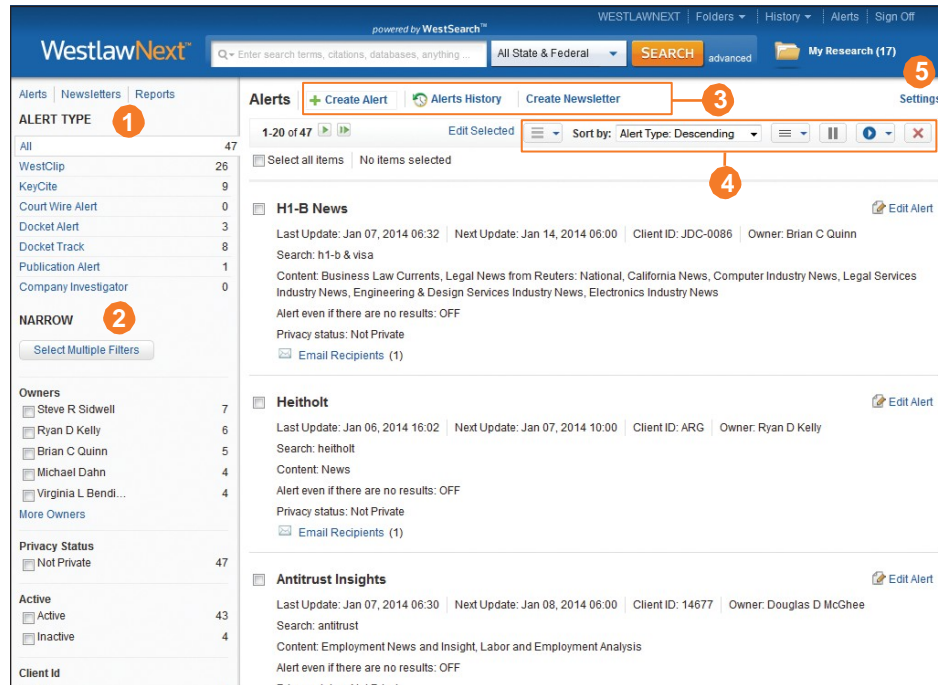


Figure 2. Alert Management Center

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).

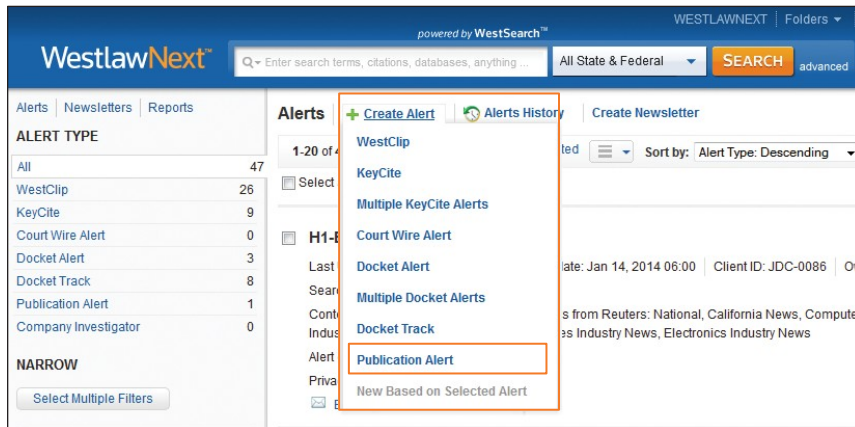


Figure 3. Selecting an alert type

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.

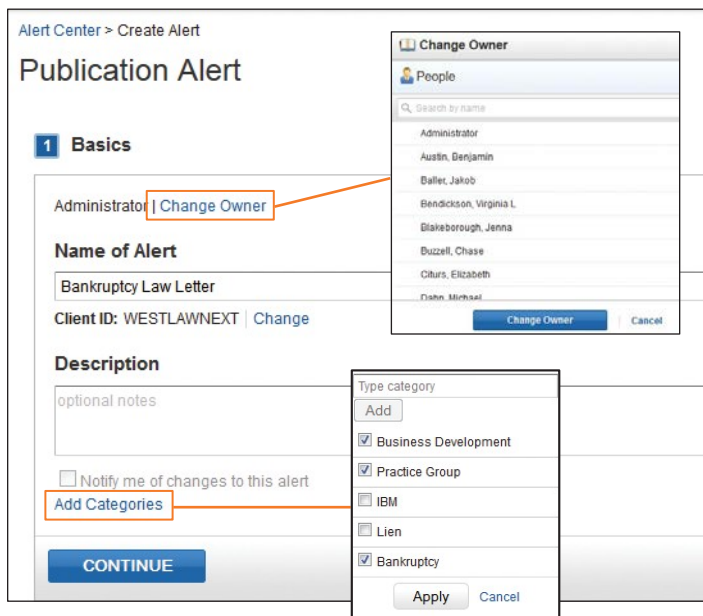


Figure 4. Step 1 Basics

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.

- 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**.

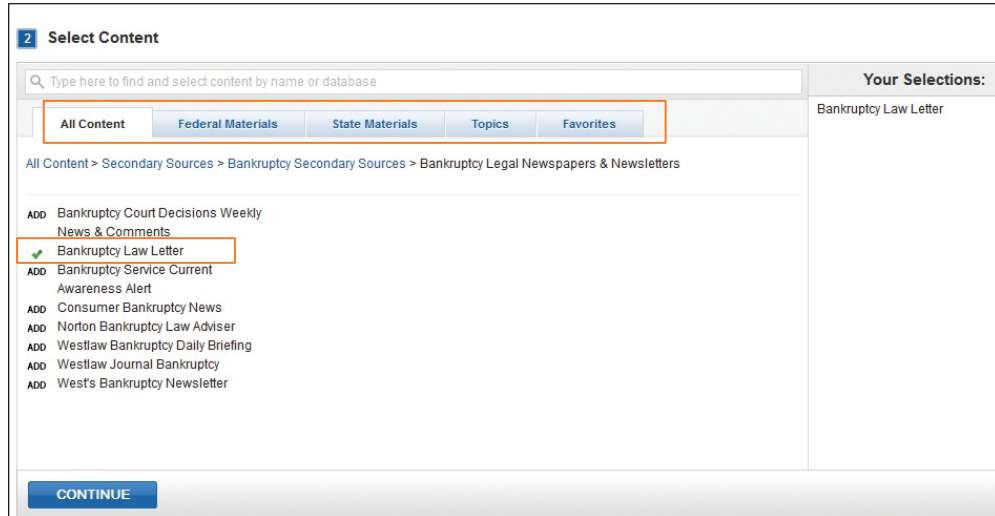
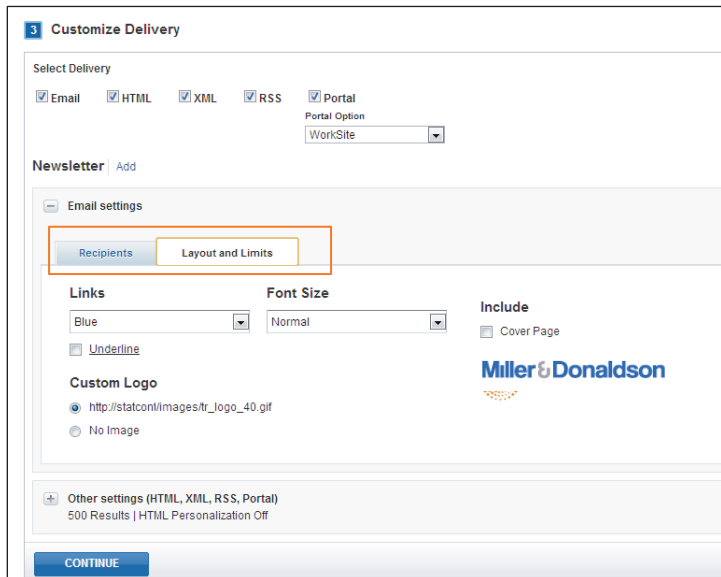


Figure 5. Step 2 Select Content

- 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**.

The screenshot shows the 'Customize Delivery' interface in WestlawNext. Under the 'Email settings' section, the 'Recipients' tab is highlighted with a red box. Below this, there is a text input field for the recipient's email address, currently containing 'heid.larson@law.com'. Below the recipient field, there are two checkboxes: 'Allow recipients to unsubscribe from this alert delivery' (unchecked) and 'Do not use a Sponsor ID' (checked). There are also fields for 'Sponsor ID' and 'Reply To', both with checkboxes for 'Do not use a Sponsor ID' and 'Do not use a reply-to address' (both checked). The 'Subject' field contains 'Publication Alert: Bankruptcy Law Letter'. At the bottom, there are 'Format' and 'Number of Items' options.

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.

The screenshot shows the 'Schedule Alert' interface. Under the 'Frequency' section, 'Weekdays (M-F)' is selected. Under 'Alert At These Times', '(GMT-06:00) Central Time (US & Canada)' is selected. The 'End Date' is set to 'none'. There are two rows of checkboxes for AM and PM hours (12-11). The 'Alert even if there are no results' checkbox is checked and highlighted with a red box. There is a 'Pause this Alert' button with a pause icon. At the bottom, there is a blue 'SAVE ALERT' button.

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.

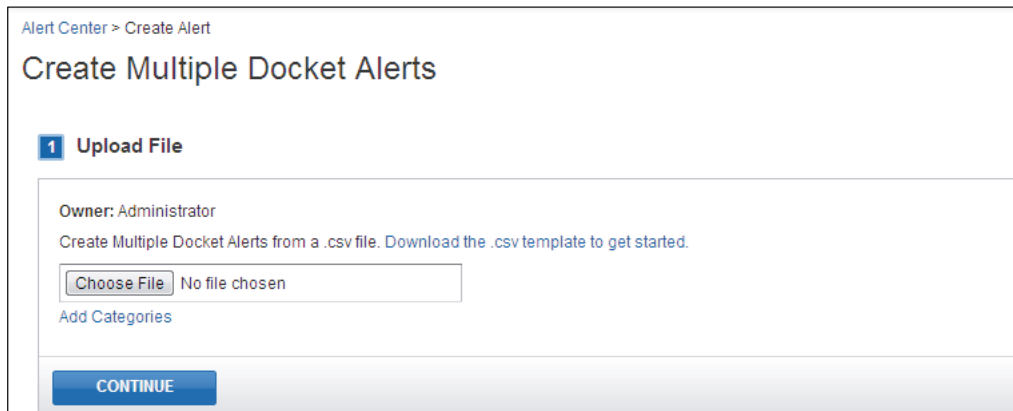
## Creating Multiple Alerts

### 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**.



The screenshot shows a web interface for creating alerts. At the top, it says 'Alert Center > Create Alert'. The main heading is 'Create Multiple Docket Alerts'. Below this, a step indicator shows '1 Upload File'. The content area includes 'Owner: Administrator', a sub-heading 'Create Multiple Docket Alerts from a .csv file. Download the .csv template to get started.', a 'Choose File' button next to a text box containing 'No file chosen', and a link 'Add Categories'. At the bottom is a blue 'CONTINUE' button.

Figure 8. Step 1 Upload File

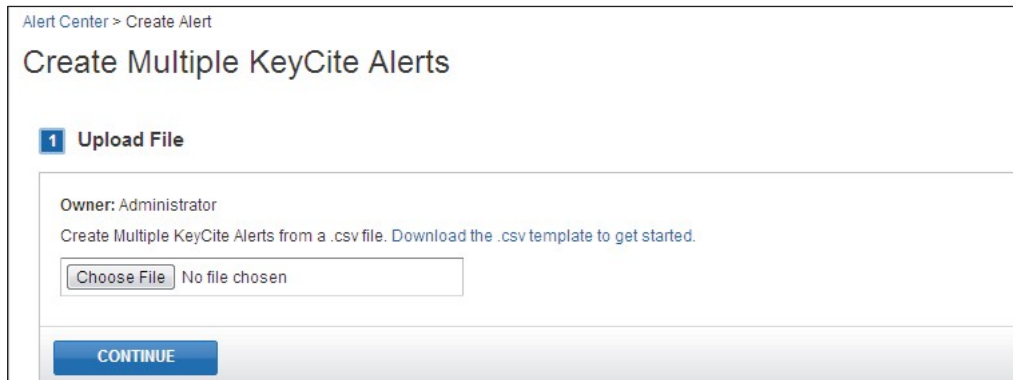
3. Follow steps 1 through 5 to finish your Docket Alert. Click **Continue** to move from step to step. When you have finished making your selections, click **Save Alert**.

### 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**.



The screenshot shows a web interface for creating alerts. At the top, it says 'Alert Center > Create Alert'. The main heading is 'Create Multiple KeyCite Alerts'. Below this, a step indicator shows '1 Upload File'. The content area includes 'Owner: Administrator', a sub-heading 'Create Multiple KeyCite Alerts from a .csv file. Download the .csv template to get started.', a 'Choose File' button next to a text box containing 'No file chosen', and a link 'Add Categories'. At the bottom is a blue 'CONTINUE' button.

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).

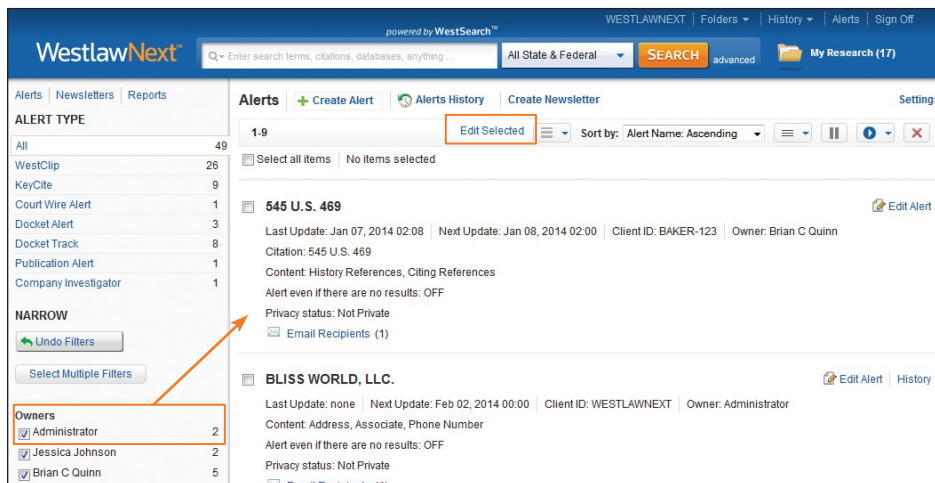


Figure 10. List of filtered alerts

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**.

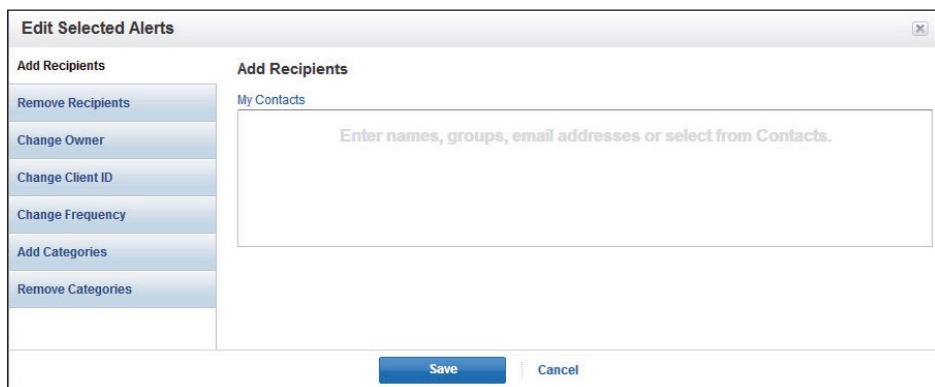


Figure 11. Edit Selected Alerts dialog box

## 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).

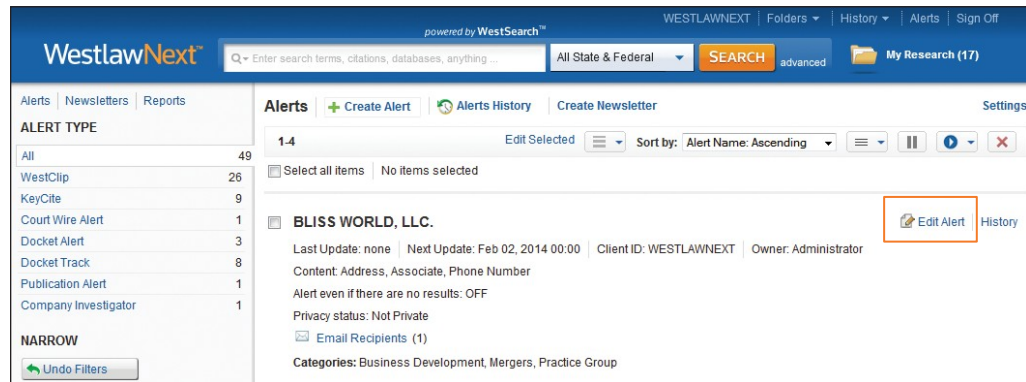


Figure 12. Edit Alert

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).

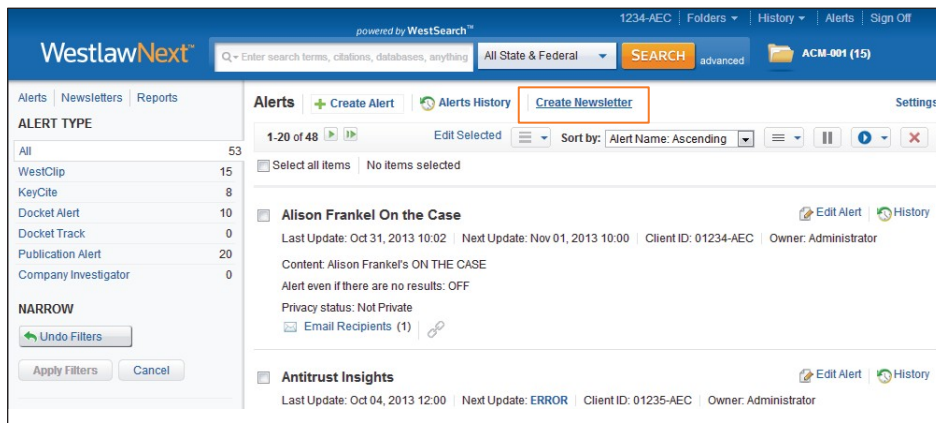


Figure 14. Creating a newsletter

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**.

The screenshot shows the 'Alert Newsletter' page in the 'Basics' step. The 'Owner' dropdown is set to 'Administrator'. The 'Name of Newsletter' text box contains 'Ohio Labor and Employment'. The 'Description' text box contains 'optional notes'. A blue 'CONTINUE' button is located at the bottom of the form.

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**.

The screenshot shows a web interface titled "2 Select Alerts". At the top, there is a search bar with the placeholder text "Enter text to narrow your alert list, then select ADD to include it in this Newsletter" and a "Clear" button. To the right of the search bar is a dropdown menu labeled "Alert Name". Below the search bar is a list of alerts under the heading "Your Alerts". Each alert has an "ADD" button next to it. Two alerts, "Ohio Discriminatory Practices § 4112.02 (KeyCite)" and "Smith v. Red Lobster (KeyCite)", have green checkmarks next to their "ADD" buttons. To the right of the list is a vertical scrollable area titled "Your Selections:" which contains the two selected alerts. At the bottom of the interface is a blue "CONTINUE" button.

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**.

The screenshot shows a web interface titled "3 Customize Delivery". At the top, there is a "Email settings" section with two tabs: "Recipients" and "Layout and Limits". The "Layout and Limits" tab is selected and highlighted with an orange box. Below the tabs are several settings sections: "Page Layout" with a checked checkbox for "Dual column layout for Newsletters"; "Font" with a dropdown menu set to "Arial"; "Links" with a dropdown menu set to "Blue" and a "Font Size" dropdown menu set to "Normal"; "Include" with a checkbox for "Cover Page"; and "Custom Logo" with a radio button selected for "http://statcon/images/tr\_logo\_40" and another for "No Image". To the right of the "Custom Logo" section is a preview of the Thomson Reuters logo. At the bottom of the interface is a blue "CONTINUE" button.

Choose to display a custom logo on the newsletter.

Figure 17. Step 3 Customize Delivery

- 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

- 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:

- Click **Reports** in the left column of the Alert Management Center.
- 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**.

Report Center > Create Report

## Alert Summary Report

**1 Basics**

**Name of Report**

All Alerts

**Description**

optional notes

**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**.

**2 Select Content**

**Alert Types**

All Alert Types

WestClip

KeyCite

Docket Alert

Docket Track

Publication Alert

**Alert Status**

Only Active Alerts

All Alerts

**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**.

The screenshot shows a web interface titled "3 Customize Delivery". It features a "Recipients" section with a "To" field containing the email address "ross.smith@mdlaw.com" and a "My Contacts" link. Below this is a "Subject" field with the text "Alert Summary Report: All Alerts" and an "Email Note" field with the text "optional notes". A blue "CONTINUE" button is located at the bottom of the form.

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.

The screenshot shows a web interface titled "4 Schedule Alert". It contains two columns of settings. The left column has a "Frequency" dropdown set to "Weekly", an "End Date" field set to "none", and a checkbox labeled "Alert even if there are no results". The right column, titled "Alert At This Time", has a time zone dropdown set to "(GMT-06:00) Central Time (US & Canada)", a day dropdown set to "Sunday", and a time dropdown set to "12:00 AM". A blue "SAVE ALERT" button is at the bottom.

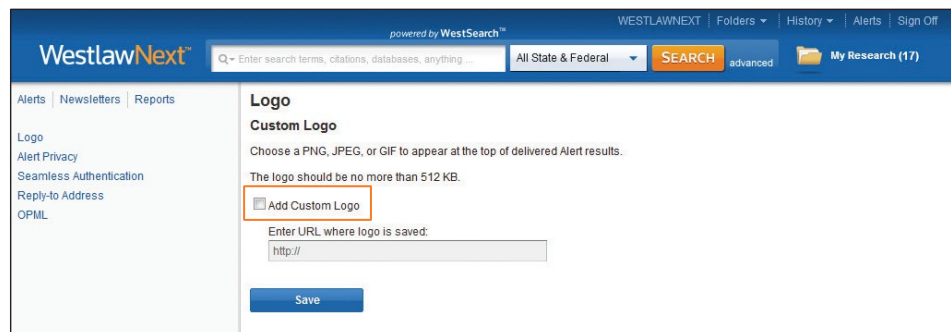
Figure 23. Step 4 Schedule Alert

## 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.



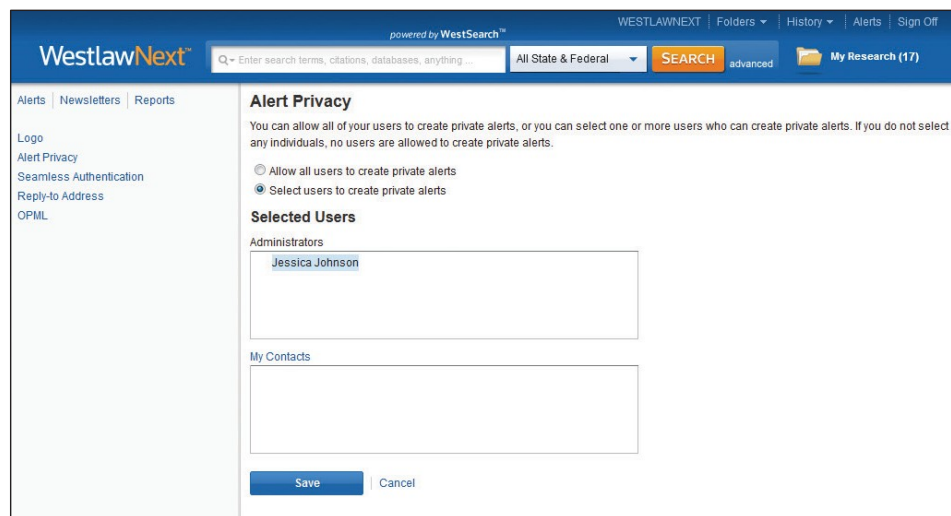
The screenshot shows the WestlawNext interface for the Custom Logo settings. The page title is "Logo" and the sub-section is "Custom Logo". The instructions state: "Choose a PNG, JPEG, or GIF to appear at the top of delivered Alert results. The logo should be no more than 512 KB." There is a checkbox labeled "Add Custom Logo" which is checked. Below it is a text input field labeled "Enter URL where logo is saved:" with the text "http://". A "Save" button is located at the bottom of the form.

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.



The screenshot shows the WestlawNext interface for the Alert Privacy settings. The page title is "Alert Privacy". The instructions state: "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." There are two radio button options: "Allow all users to create private alerts" and "Select users to create private alerts", with the second option selected. Below the options is a section titled "Selected Users" with two sub-sections: "Administrators" and "My Contacts". The "Administrators" section contains a text input field with the name "Jessica Johnson". The "My Contacts" section contains an empty text input field. "Save" and "Cancel" buttons are located at the bottom of the form.

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.

The screenshot shows the WestlawNext interface with the 'Seamless Authentication' settings page. The page title is 'Seamless Authentication' and the subtitle is 'You can set a sponsor ID to allow recipients to seamlessly access full-text documents from your alert results'. There are two radio button options: 'Do not use seamless authentication' (selected) and 'Use seamless authentication'. Below the second option is a text input field for 'Sponsor ID:'. Under the 'Apply to' section, there are two checked checkboxes: 'Email delivery' and 'Other delivery (HTML, RSS, ETC.)'. At the bottom, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the WestlawNext interface with the 'Reply-to Address' settings page. The page title is 'Reply-to Address' and the subtitle is 'You can set a default reply-to address for your alerts'. There is a checkbox option 'Use a default reply-to address' which is currently unchecked. Below it is a text input field labeled 'Send all replies to:'. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 27. Reply-to Address

## OPML

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

