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User Manual

# Alerts

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# 1 Introduction

With this manual, you will gain a basic understanding of the Alerts work in Legisway Essentials

## 1.1 Legisway Essentials Alerts

Legisway Essentials supports sending out reminders through the alert function in the system. These reminders are set up based on specific dates on dossiers. To get more information on which dates are used by default please check [this webpage](#).

Alerts are set up based on a specific report. This report can already be viewable in the system, it can also be created dedicated to the alert.

An example of this can be a report regarding contracts. Every contract dossier in Legisway Essentials has an editor linked to it. Imagine the situation in which the editor of a contract wants to get a reminder about the fact that the contract of which he is the editor, expires within the coming 3 months. The alert function in Legisway Essentials can be used for sending out this reminder.

In Legisway Essentials, an alert has a predefined frequency of sending. If this alert frequency is set to 30 days, the above mentioned alert will be sent out every 30 days. The alert will then display the Contracts related to the editor that are set to expire within 90 days from the date the alert was sent out.

The alert will be sent out every 30 days until the condition of expiration is no longer met. This can be the case through multiple ways; either because the contract was manually set to inactive, was put inactive because the expiration date passed or because the contract was prolonged, making the expiration date further away than 90 days from now.

## 1.2 Alert configurability

Like most things in Legisway Essentials, alerts are largely configurable. We could say the alert consists of two parts; the content of the e-mail and the settings regarding frequency and recipients.

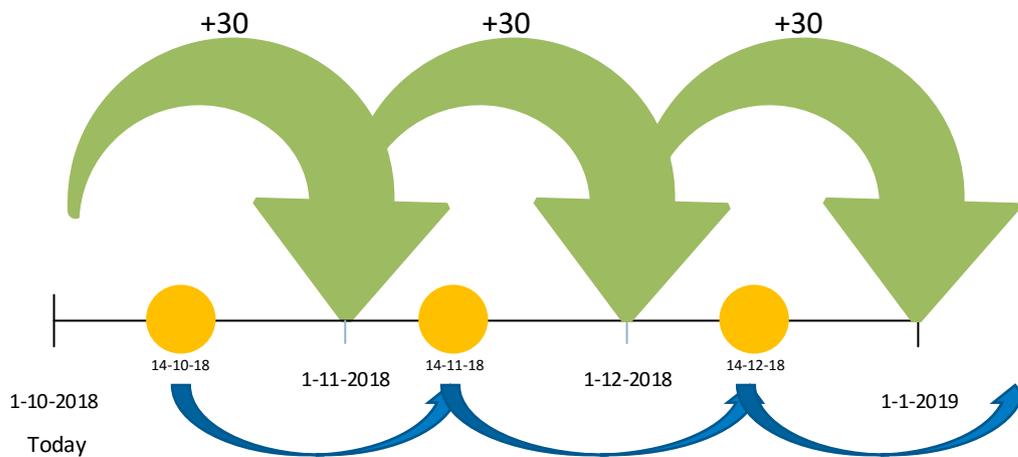
First, the content; All columns of the report being sent out can be changed, renamed or set to display different information related to the subject. If a column with information is not relevant or there is information on the dossiers that you want to add to the alert, this might also be possible. Next to the report content of the alert mailing, the text that is sent out with the report can also be configured.

Besides alert content, the specifics regarding the frequency, recipients and reporting filters can also be configured. Imagine the desire to change the above example to a two-weekly alert run that displays all contracts expiring within the next 60 days. These settings can all be configured in the alert settings. The same goes for who will receive the report, based on login roles in your system (e.g. all editors) or specific users. This is also the case for the information in the report, one can configure whether the information displayed is linked to that specific person (for instance when that person is a contract editor) or the recipient can see all information in the system that meets the requirements of the filter.

In case of any configuration requests during a project; discuss the options with your consultant. When you have questions regarding an alert and have no project running; contact our support desk or your account manager.

### 1.3 Alert visualization

A visualization of the alert process can be seen below;



In this figure you can see that the Alert will be sent out every 30 days, as indicated by the blue arrows. The yellow dots represent the moment the alert will be sent out; as you can see, the alert will not by definition be sent out on the first of the month. However, the interval between the alert run will always be 30 days (as defined by the alert frequency). In this example this will be every 14<sup>th</sup> of the month. In this case the first alert run will start on 14-10-18, which will be T=0 in the coming example.

### 1.4 Alert example

A short example of the ongoing alert runs could look like this:

*Run 1 (14-10-18):*

All contracts set to expire within 90 days from T=0.

*Run 2 (14-11-18):*

All contracts set to expire within 90 days from T+30 days;

- Contracts that were in the first run that have not yet expired will also be in this run
- Contracts that were not in the first run because the expiration date was further away than 90 days (e.g. 95 days), but at T+30 is no longer further away than 90 days will be in this run
- Contracts that were in the first run but now have expired will not be in this run

*Run 3 (14-12-18):*

All contracts set to expire within 90 days from T+60 days;

- Contracts that were in the previous runs that have not yet expired will also be in this run
- Contracts that were not in the previous runs because the expiration date was further away than 90 days, but at T+60 is no longer further away than 90 days will be in this run
- Contracts that were in the previous runs but now have expired will not be in this run

*Run 4 will be a continuation of run 3 but then from T+90 days. Run 5 will be a continuation of run 4 but then from T+120 days etc.*

## 1.5 In short

- Alerts can be used to notify users that have a login role in the system
- Alerts are set up around a report
- Depending on preference, the content as well as the frequency and recipients of the alert can be configured
- The date the alert will be sent out depends on the first run of the alert
- If you have questions about the alert, please ask your consultant or head to our support desk