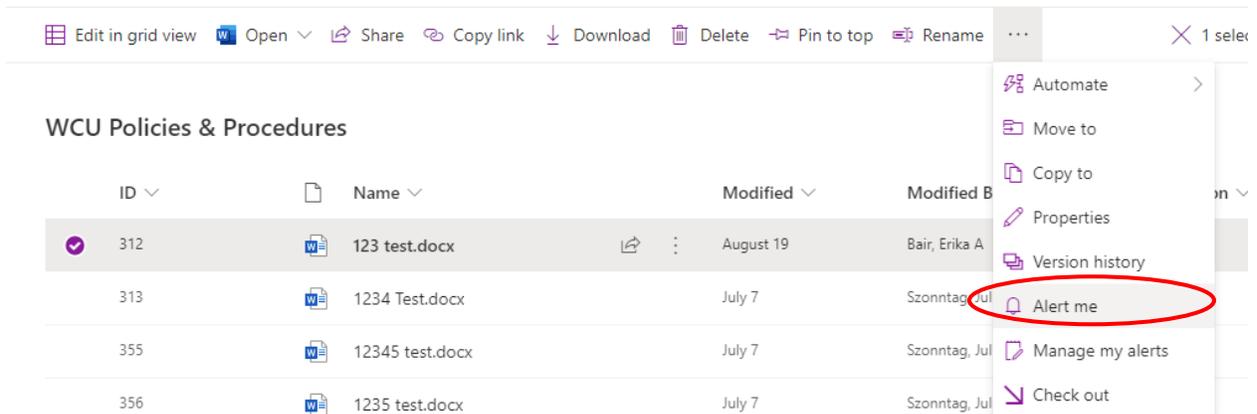


Setting up Policy Library Alerts (as part of the Security Framework)

Creating alerts for when policies are added to the SharePoint Library, edited (major and minor revisions), deleted, etc. from the Policy Library (Intranet/SharePoint)

Alerts for Individual Documents

1. Select the document you would like to create an alert for. Click on the 3 dots located on the library ribbon and select Alert me from the drop down menu.



The screenshot shows a SharePoint document library interface. At the top, there is a ribbon with various actions: Edit in grid view, Open, Share, Copy link, Download, Delete, Pin to top, Rename, and a three-dot menu. Below the ribbon is a table titled "WCU Policies & Procedures". The table has columns for ID, Name, Modified, and Modified By. The first row is selected, and a context menu is open over it, with the "Alert me" option circled in red.

ID	Name	Modified	Modified By
312	123 test.docx	August 19	Bair, Erika A
313	1234 Test.docx	July 7	Szonntag, Jul
355	12345 test.docx	July 7	Szonntag, Jul
356	1235 test.docx	July 7	Szonntag, Jul

The context menu options are: Automate, Move to, Copy to, Properties, Version history, Alert me (circled), Manage my alerts, and Check out.

2. In the 'Alert me when items change' dialog window change or fill in the options you want.
 - a. Send me alerts by: E-mail is the default. Text Message (SMS) is not supported.
 - b. Send me an alert when: you can specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.
 - c. When to Send Alerts: specify how frequently you want to be alerted.
3. Click Ok to save and close the window.

Alert me when items change



OK Cancel

Alert Title

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

WCU Policies & Procedures: 123 test.doc

Send Alerts To

You can enter user names or e-mail addresses. Separate them with semicolons.

Users:

[Redacted] X

Delivery Method

Specify how you want the alerts delivered.

Send me alerts by:

- E-mail [Redacted]@wcupa.edu
- Text Message (SMS) [Redacted]
- Send URL in text message (SMS)

Send Alerts for These Changes

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

- Anything changes
- Someone else changes a document
- Someone else changes a document created by me
- Someone else changes a document last modified by me
- Someone changes an item that appears in the following view:
Rescinded

When to Send Alerts

Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

- Send notification immediately
- Send a daily summary
- Send a weekly summary

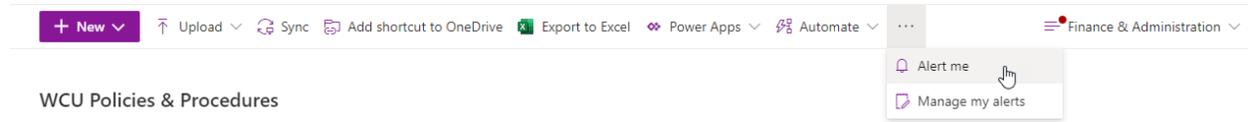
Time:

Tuesday 6:00 AM

OK Cancel

Alerts for a Division

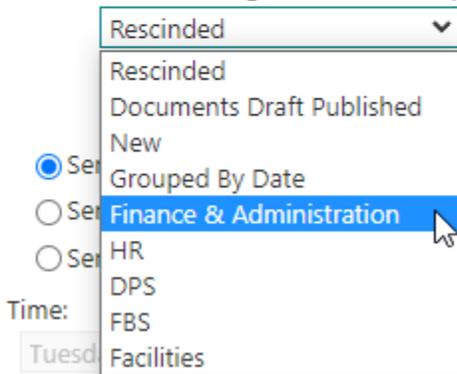
1. Click on the 3 dots on the library ribbon and select Alert me



2. In the 'Send me an alert when' section select 'Someone changes an item that appears in the following view' and click in the box to select the division view.

Send me an alert when:

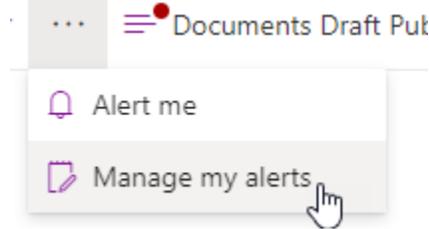
- Anything changes
- Someone else changes a document
- Someone else changes a document created by me
- Someone else changes a document last modified by me
- Someone changes an item that appears in the following view:



3. Click Ok to save and close the window.

Edit or Delete an Alert

1. Click on the 3 dots located on the library ribbon and select 'Manage my alerts'



2. If you setup an alert for a particular document, you will see the document name in the list.
3. If you setup an alert for a division the alert will be listed as 'WCU Policies & Procedures'
4. Click on the alert to open the 'Edit Alert' window
5. After you made your changes click Ok to save and close the window.
6. Select the alert you wish to delete and click on Delete Selected Alerts

 Add Alert |  Delete Selected Alerts

Alert Title

Frequency: Immediate

- WCU Policies & Procedures
- WCU Policies & Procedures: 123 test.docx

Frequency: Daily

- WCU Policies & Procedures

Delivery Method(s)

E-mail
E-mail

Delivery Method(s)

E-mail