

Targeted Alerts

supportcenter.nc4.com/hc/en-us/articles/218653297-Targeted-Alerts

E Team uses Targeted Alerts to let users know when they have been assigned responsibility for a report or when another user wants to notify them that a report contains information they should be aware of, or requires their attention.

- To enable Targeted Alerts, each individual user must check the Targeted Alerts option under the Preferred Method of Notification on your Personal Profile document. This is checked for you by default when your profile is first created.
- The interval between when a document is submitted and a user is notified of the Alert is determined by a setting made by your E Team System Administrator within the E Team General Configuration document.
- Targeted Alerts follow all the same rules as E Team report access and access control standards. If a user has not been provided with the proper report permissions or access control rights, the user will not gain access to a report through a Targeted Alert. Users who receive a Targeted Alert and are then denied access to the report should contact their supervisor or E Team System Administrator.
- If your organization has enabled the [Default Event References](#) option, the Targeted Alerts frame is replaced with a Default Event Reference frame that contains a listing of Planned Activities and Links related to the default event. Your targeted alerts will continue to be generated, however you will not have access to them until the Default Event References option is disabled.
- If you do not see a Targeted Alerts frame and your organization has not enabled Default Event References you can:
 - Click on the View Area Expansion Button on the right middle section of the view frame, or
 - Click on the Alert icon at the top right on the Toolbar.

Generating a Targeted Alert

Targeted Alerts can be generated in two ways:

1. Using the E Team [Responsible Entity](#) set of fields, you can assign responsibility to an individual user or to a group of users whose Personal Profile document settings match the Organization/Location and Position selected.

RESPONSIBLE ENTITY:

[Clear Responsibility](#)

☒ Uncheck to send Targeted Alert ONLY to the individual selected. When checked a Targeted Alert is sent to all users whose Personal Profile matches the Org/Location and Position selected.

Individual: [Select](#)

Organization/Location: [Select](#)

Position: [Select](#)

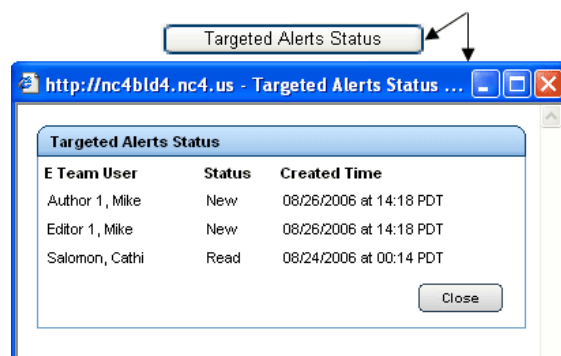
Agency: [Select](#)

- By default, a Targeted Alert is sent to all users whose Personal Profile matches the Organization/Location and Position selected. To send a targeted alert to an individual ONLY, you must uncheck this box.
This default option can be changed by your System Administrator, in which case this box will be unchecked and you must check it to send to multiple users.
 - Individual - Click Select to make a selection from options provided. The system will fill in the remaining fields for you.
If this list is long and you know the Organization/Location and Position of the individual, you can first make selections in those 2 fields. This will cause the Individual selection window to filter display to only those users matching your criteria.
 - Organization/Location - Click Select to make a selection from the options provided.
 - Position - Click Select to make a selection from the options available within the Organization/Location selected.
 - Agency - This field will be populated for you when selecting an Individual. This field can be left blank or you may select from the options provided.
2. Using the E Team [Notification](#) set of fields, you can generate a targeted alert to any E Team notification recipient that has checked Targeted Alerts as a preferred method of notification on their Personal Profile document.

Checking Targeted Alert Status

To view the status of a Targeted Alert:

- Select the report instance from the appropriate view.
- While in read-only mode, select the Notification tab.
- Click on the Targeted Alerts Status button to open the status window.



- Alert Status detail includes the user name, a status of New or Read and the date/time of the Alert.

Receiving Targeted Alerts / Accessing Your Targeted Alert Window

- Each E Team user has his/her own Targeted Alert window.
- The Alert icon at the top right on Toolbar blinks whenever unread alerts are present in your Targeted alert window.
- Alert details include date/time of alert, report type, message or responsibility notification text, and report name with document link.
- Unread Alerts display with a red document link.
- Read Alerts display with a blue document link.
- Clicking on a document link opens that document read-only mode, and causes the system to change the Alert status to read.
- To delete Targeted Alerts from your Targeted Alert window, click on the check box next to each and then click on the Remove button. The system will warn you if you attempt to delete an unread alert, but will not prevent you from doing so.

