

# CREATING/MANAGING ALERTS

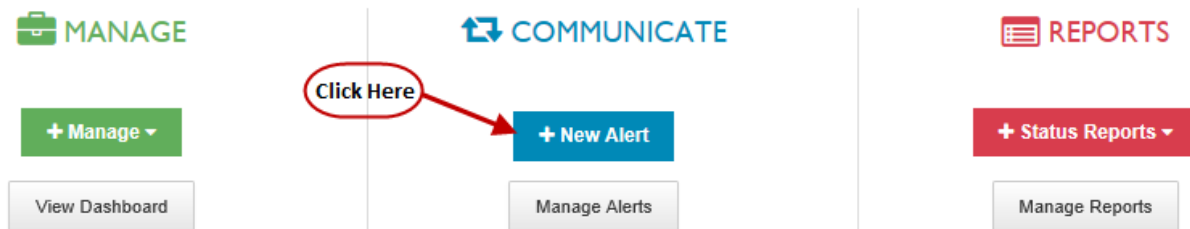
(Updated 8/5/15)

There may be occasions when you need to send a message regarding WSO to selected users (teachers, admins) within your program or school. A convenient tool for this purpose is the WSO 'Alert' function. Examples of typical use of alerts are: to solicit status from teachers regarding their progress in completing checklists and/or narrative summaries, and to pass messages to your users to draw awareness to specific WSO related information. These alerts are displayed to the targeted users the next time they log into WSO. Also please note that since you also have an option to manage your alerts after the fact, these instructions have two sections: 'CREATING ALERTS' and 'MANAGING ALERTS'.

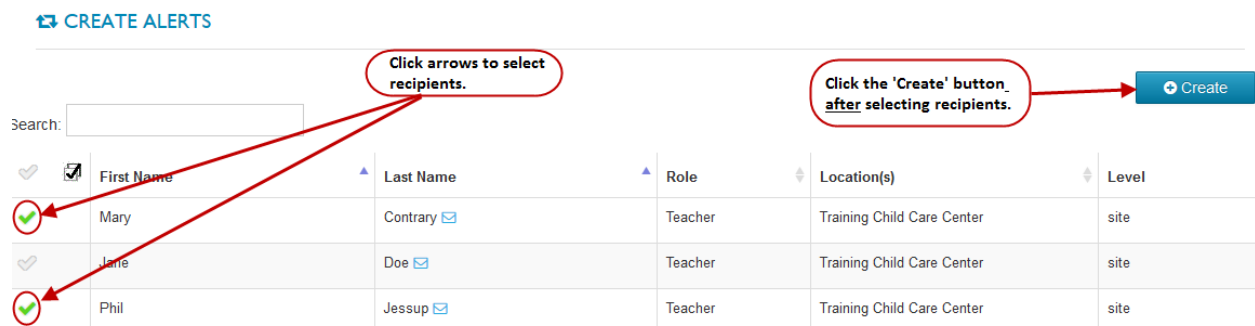
## Section 1: Creating Alerts

**To create the alerts do the following:**

1. On the WSO Home screen, under the COMMUNICATE section, click the 'New Alert' button.



2. The below CREATE ALERTS screen will be displayed. On this screen you will choose the users to whom you wish to direct an "alert" by clicking the arrows next to their name(s). Arrow(s) will become green once clicked to indicate a selected alert recipient. Then click the blue 'Create' button.



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3. Populate the below required fields on the resulting screen:

- **Alert Notification** – You have two options in the dropdown box:
  - Show as Pop-up after login (RECOMMENDED) - Results in a pop up screen displaying when a targeted teacher logs into WSO. Using this option increases the likelihood of the teacher seeing your message expeditiously.
  - Show in Alert Toolbar – Results in an ‘Alert’ message dropping down from the WSO toolbar when the teacher logs into WSO but ONLY IF the teacher clicks the ‘Alerts’ icon (red bell) on the WSO toolbar. Also the ‘Alert’ message counter increments by one to indicate the number of active alerts the teacher has in her/his alert queue.
- **Start Date/Expiration Date** - Click the calendar icon next to the “Start Date” and “Expiration Date” fields to select the dates on which you want the alert to begin and end for the chosen teacher(s). Since the teacher will only see the alert when he/she next logs into WSO, be sure to select a start and expiration date that allows a sufficient number of days within which the teacher would reasonably have logged into WSO again. Otherwise, he/she will never see the alert.
- **Title** - Choose an appropriate subject for the title field.
- **Message** - Create your message to the teacher(s) in this field. When the teacher(s) receive your message, they will also see your name added at the end.
- **Save Button** - Click the ‘Save’ button to create the alert.

The screenshot shows a 'CREATE ALERT' form with the following fields and annotations:

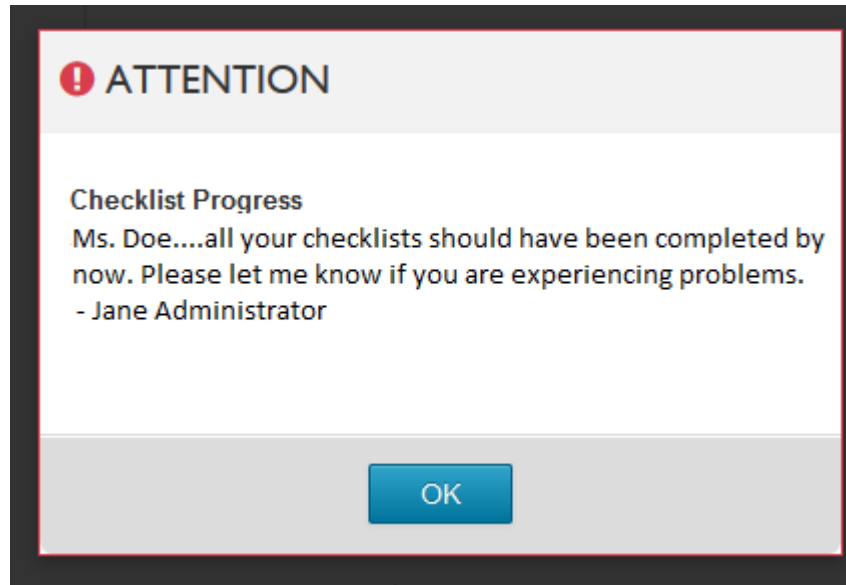
- Alert Notification:** A dropdown menu with 'Show in Alert Toolbar' selected. An arrow points from a 'Populate all fields.' callout to this dropdown.
- Start Date:** A date field showing '1/22/2015' with a calendar icon. An arrow points from the 'Populate all fields.' callout to this field.
- Expiration Date:** A date field showing '1/28/2015' with a calendar icon. An arrow points from the 'Populate all fields.' callout to this field.
- Title:** A text field containing 'Checklist Progress'. An arrow points from the 'Populate all fields.' callout to this field.
- Message:** A text area containing 'Ms. Doe....all your checklists should have been completed by now. Please let me know if you are experiencing problems.' An arrow points from the 'Populate all fields.' callout to this field.
- Character Count:** '847 characters remaining (1000 maximum)' is displayed below the message field.
- Buttons:** 'Save' and 'Cancel' buttons are at the bottom. A callout bubble says 'Don't forget to click "Save".' with an arrow pointing to the 'Save' button.

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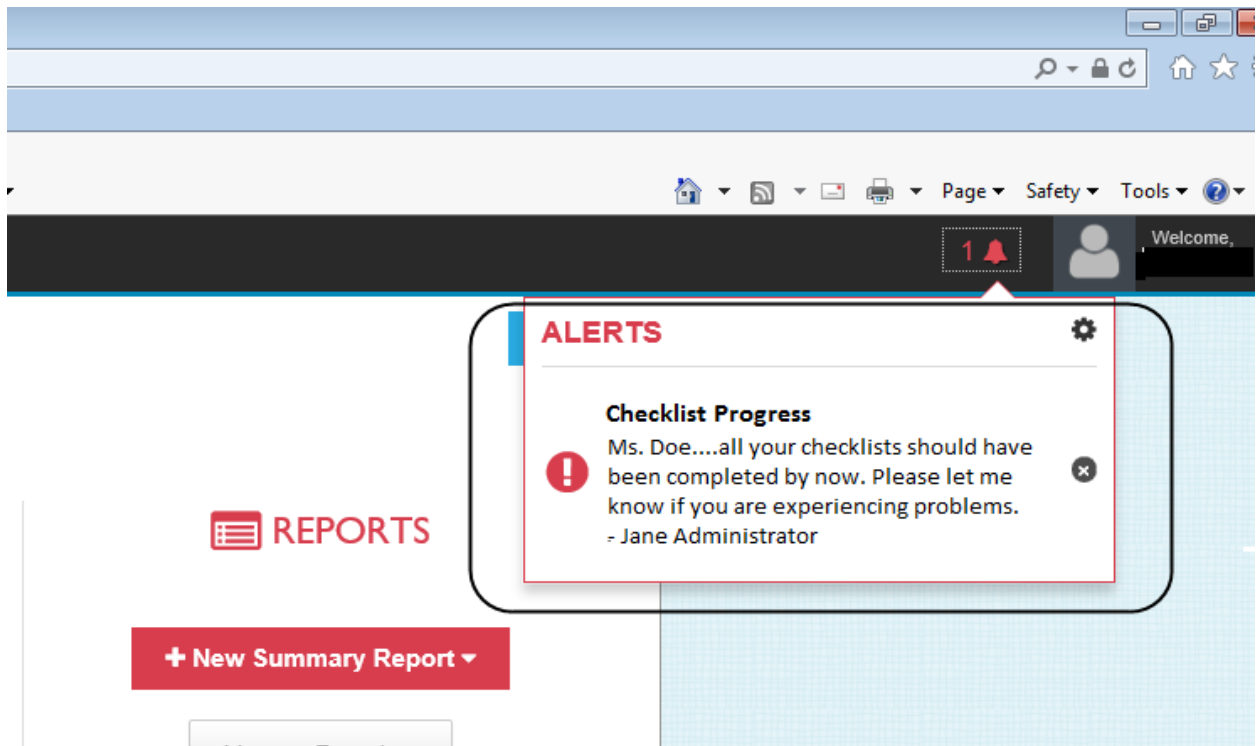
(Updated 8/5/15)

4. The next time the targeted teacher(s) log into WSO an alert will be displayed based upon the 'Alert Notification' option chosen in Step 2 above. Below are examples of the results from the two options.

## Show as Pop-up after Login Option



## Show in Alert Toolbar Option



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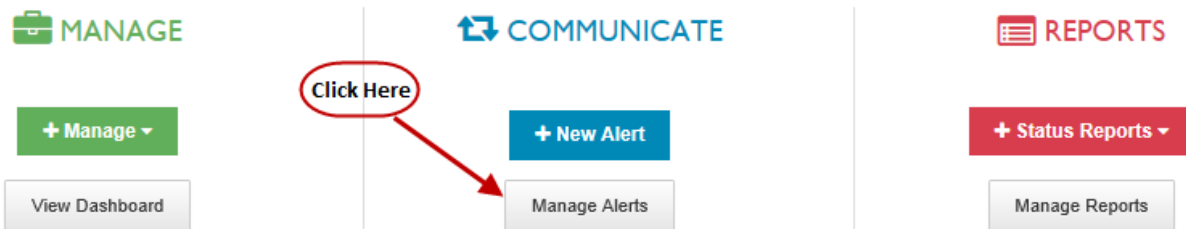
(Updated 8/5/15)

## Section 2: Managing Alerts

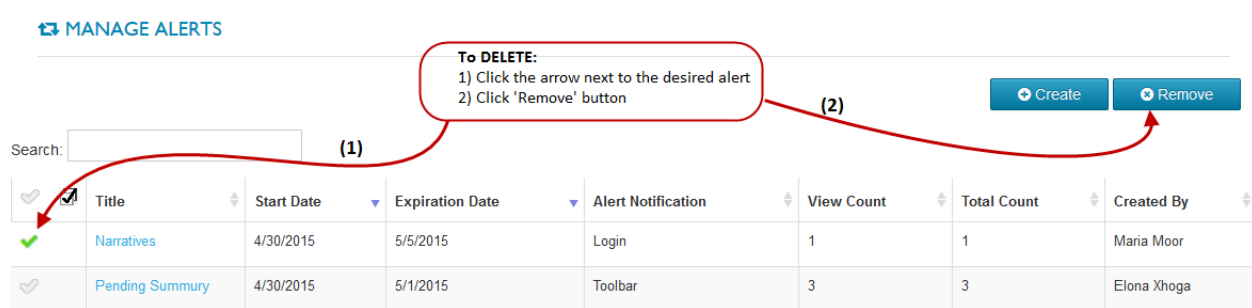
Once you have created an alert, the alert will remain in the WSO database until deleted. This allows you to do such things as review prior alerts, delete an alert, change the expiration date of an active alert, etc. Although you can see all alerts you have previously created on the 'MANAGE ALERTS' screen, they no longer display to the targeted users after their expiration date.

To manage your alerts do the following:

1. On the WSO Home screen, under the COMMUNICATE section, click the 'Manage Alerts' button.



2. A 'MANAGE ALERTS' screen (as seen in the examples) will be displayed and show all the alerts you have created. From this screen you can do a number of things including:
  - o **Delete** an alert by clicking the arrow next to the desired alert and then clicking the blue 'Remove' button. The 'Remove' button will not become active until an alert(s) is selected. **(NOTE: If you delete an alert prior to its expiration date, users having not seen the alert at the time you delete it will NEVER see it.)**



## CREATING/MANAGING ALERTS

(Updated 8/5/15)

- **Edit** an alert by clicking on the alert Title, making modifications on the 'EDIT ALERT' pop up screen, and clicking the 'Save' button.

**MANAGE ALERTS**

Search:

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Title	Start Date	Expiration
<input type="checkbox"/>		<a href="#">Checklist Progress</a>	4/30/2015	5/5/2015
<input type="checkbox"/>		<a href="#">Pending Summary</a>	4/30/2015	5/1/2015

**EDIT ALERT** ✕

**Make desired changes.**

▶ = Required

▶ Alert Notification:  
Show as Pop-up after login

▶ Start Date:  
04/30/2015

▶ Expiration Date:  
05/5/2015

▶ Title:  
Checklist Progress

▶ Message:  
Ms. Doe....all your checklists should have been completed by now. Please let me know if you are experiencing problems.

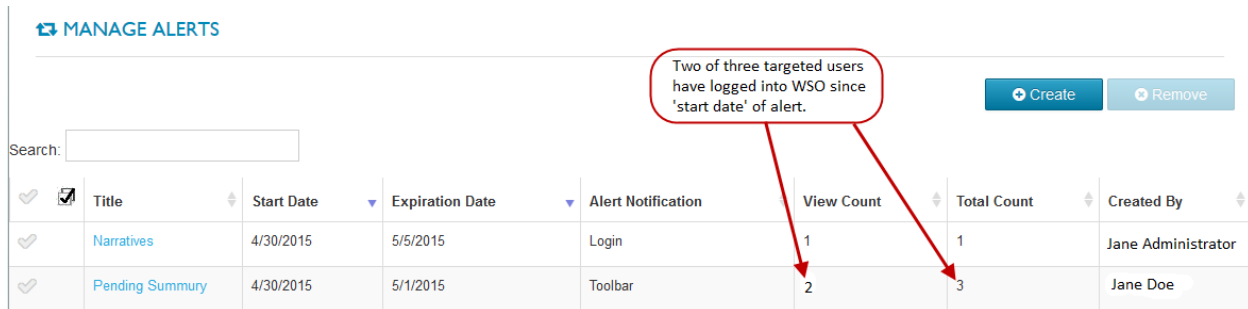
**Click 'Save'**

**Save** Cancel

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(Updated 8/5/15)

- **Determine the view status of an alert.** The MANAGE ALERTS screen shows various information regarding your alerts. A piece of information that you may find very useful is under the 'View Count' and 'Total Count' columns. The Total Count is the total number of users to whom the alert was sent. The View Count is the number of targeted users who have actually logged into WSO and should have viewed the alert. However the names of those who have not viewed the alert is not available.



MANAGE ALERTS

Search:

[+ Create](#) [+ Remove](#)

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Title	Start Date	Expiration Date	Alert Notification	View Count	Total Count	Created By
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Narratives	4/30/2015	5/5/2015	Login	1	1	Jane Administrator
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pending Summary	4/30/2015	5/1/2015	Toolbar	2	3	Jane Doe