

Creating Alerts

Learn how to create and manage alerts in Compass.

In Compass, alerts are associated with binders, so to create an alert, we have to start with a binder.

Suggested viewing: Binders 101

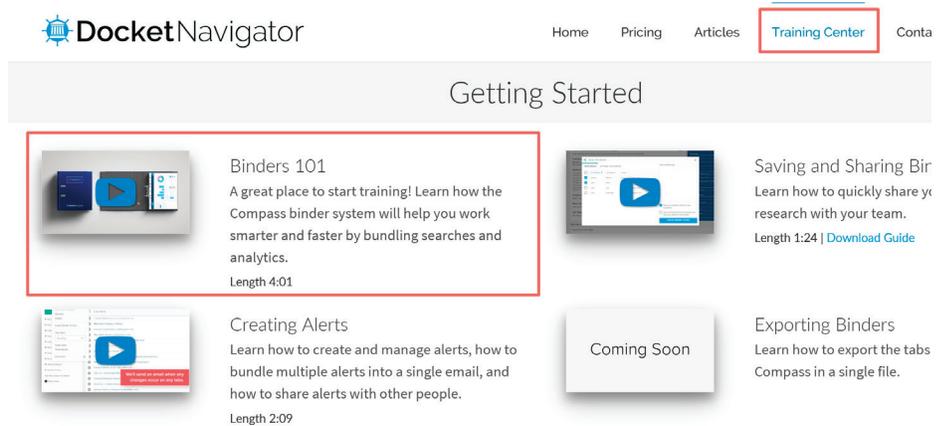
Once you've created a binder, make sure to save it. A yellow icon next to the binder name means there are unsaved changes.

To Save:

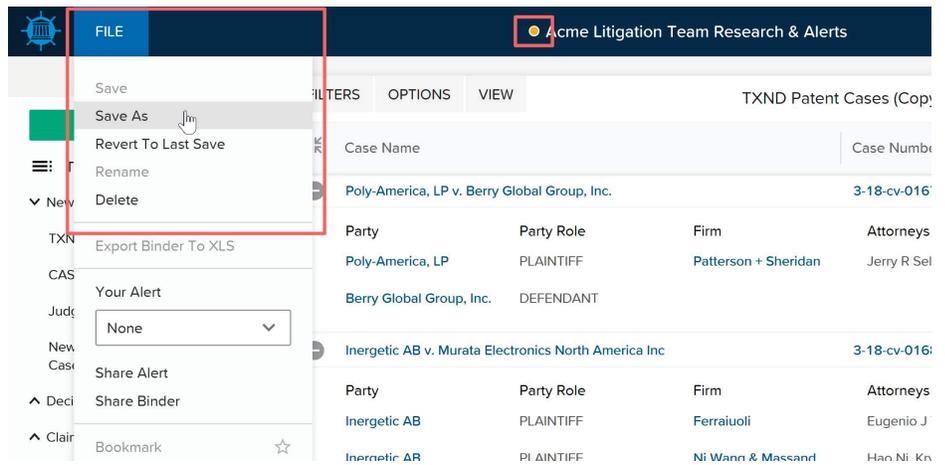
- Click **FILE**.
- Click **Save** for a custom built binder.
- Click **Save As** for a pre-built binder, (e.g. a "Quick Profile", Report, or shared).

To set up your alert:

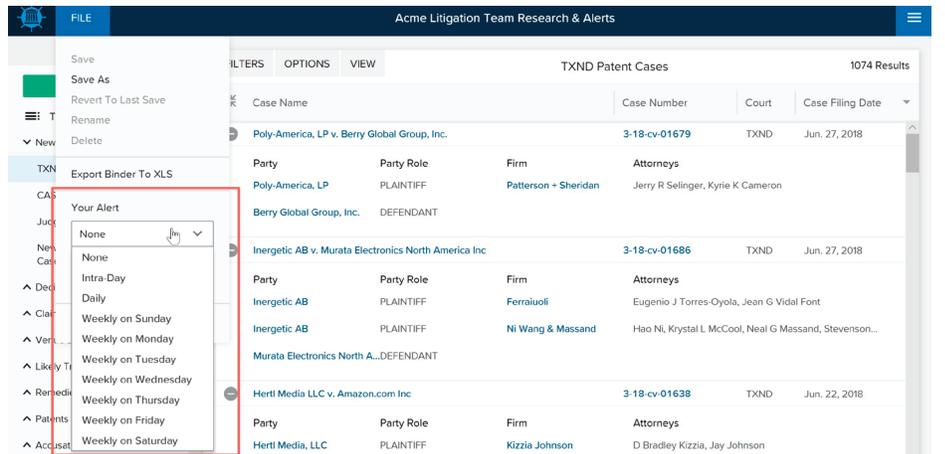
- Click **FILE**.
- Under **Your Alert**, choose a notification frequency.
- That's it! You'll be notified when there are changes to ANY of the tabs in your binder. One alert covers the entire binder.
- To turn the alert off, under **Your Alert** set the frequency back to **None**.



The screenshot shows the DocketNavigator 'Getting Started' page. A red box highlights the 'Binders 101' video thumbnail, which includes a play button icon and a description: 'Binders 101 A great place to start training! Learn how the Compass binder system will help you work smarter and faster by bundling searches and analytics. Length 4:01'. Other visible elements include the 'Training Center' link in the top navigation, a 'Coming Soon' button, and a 'Saving and Sharing Binders' video thumbnail.



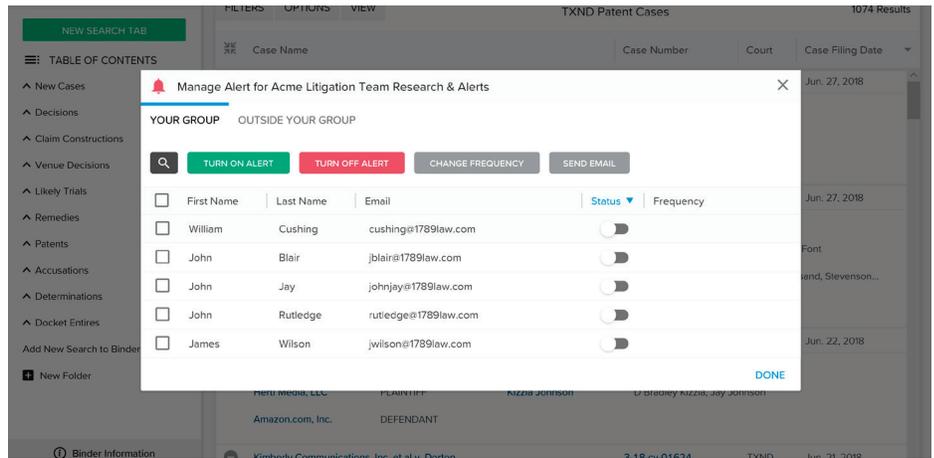
The screenshot shows the 'FILE' menu in DocketNavigator. A red box highlights the 'Save As' option. The menu also includes 'Save', 'Revert To Last Save', 'Rename', 'Delete', 'Export Binder To XLS', 'Your Alert' (with a dropdown menu currently set to 'None'), 'Share Alert', 'Share Binder', and 'Bookmark'. The background shows a table of 'TXND Patent Cases' with columns for Case Name, Case Number, Party, Party Role, Firm, and Attorneys.



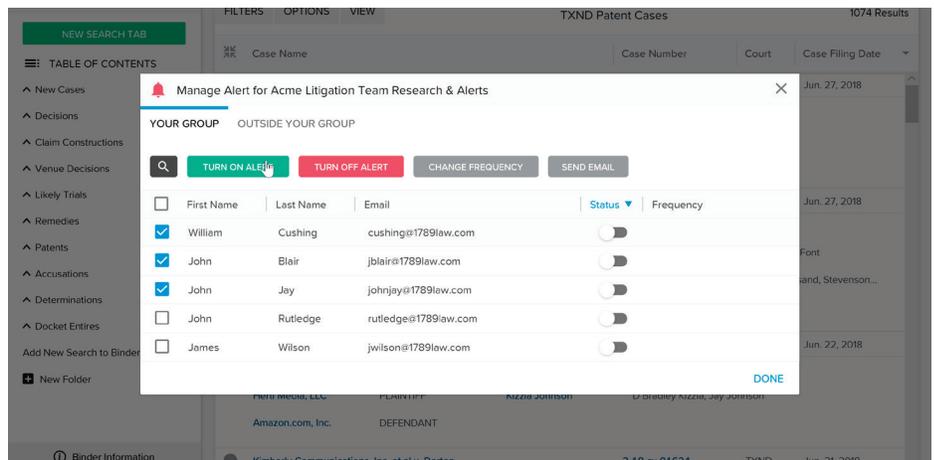
The screenshot shows the 'FILE' menu with the 'Your Alert' dropdown menu open. A red box highlights the dropdown options: 'None', 'Intra-Day', 'Daily', 'Weekly on Sunday', 'Weekly on Monday', 'Weekly on Tuesday', 'Weekly on Wednesday', 'Weekly on Thursday', 'Weekly on Friday', and 'Weekly on Saturday'. The background shows the same 'TXND Patent Cases' table as the previous screenshot.

To set up an alert for someone else:

- Make sure your binder is saved.
- Click **FILE**.
- Select **Share Alert**.
- This will give you a pop-up window.



- Select the names of the new recipients.
- Click the green **TURN ON ALERT** button at the top.
- Select a frequency.
- Click **DONE** or close the box. The binder will automatically be shared and alerts will begin.
- To remove the alert, repeat the steps above and select the red **TURN OFF ALERT** button.



- You can also share alerts from your **Binder Wall**. Watch the Navigating the Binder Wall video for more information.
- To manage your list of existing alerts, select **Alerts** in the main menu. Watch the Manage Your Alerts video for more information.



Please send an email to contact@docketnavigator.com if you have any questions. We're always happy to help.

