

## Manage Custom Alerts

Custom alerts, previously known as private alerts, are customized alerts to meet the specific needs of your school and/or district. Custom alerts are used to notify relevant personnel that a potentially unwanted person is signing in to a building. They are commonly used for:

- Custody issues
- Restraining orders
- Banned visitors

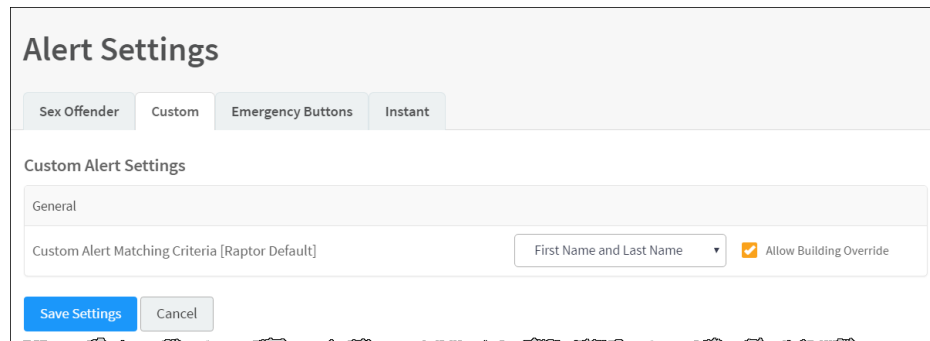
Custom alerts perform similar to offender alerts except that the matching criteria, such as Last Name, First Name and Last Name, or First Name, Last Name and Date of Birth is defined by your school and/or district. When a visitor or contractor is signed in, Raptor compares that person's first name and last name (depending on the selected matching criteria) to each of the custom alerts defined.

During the sign in process, if one or more matches are detected, a Possible Custom Alert displays on the screen. The user must carefully compare the information displayed in the Possible Custom Alert to determine if it is an actual match. It is recommended that the details in the alert, such as the photo, middle name, and notes be reviewed to confirm an accurate match.

If a match is confirmed, a silent alert is immediately sent via email, text message, and/or voice message to a customized recipient list. For positive matches, users are instructed to follow the proper procedures set up by your school or district.

## Specify Custom Alert Matching Criteria

When creating custom alerts, Administrators with the *Can Manage Alerts* permission can set the criteria that must be matched before a possible custom alert is generated. They can also specify whether this setting can be overridden at the building level.



**Alert Settings**

Sex Offender Custom Emergency Buttons Instant

Custom Alert Settings

General

Custom Alert Matching Criteria [Raptor Default] First Name and Last Name  Allow Building Override

Save Settings Cancel

Perform the following steps to specify the matching criteria for custom alerts:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **General** area under **Custom Alert Settings**, select the criteria that must be matched from the **Custom Alert Matching Criteria** drop-down list. Matching criteria can be based on the following:
  - Last Name
  - First Name and Last Name
  - First Name, Last Name, and Date of Birth
4. If you are at the client level (All Buildings), the **Allow Building Override** check box is visible. If you want to allow this setting to be changed at the building level, select the check box.
5. Click **Save Settings**.

### Add Custom Alert

Perform the following steps to create a custom alert.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click **Add Custom Alert**.


Custom Alerts						<a href="#">+ Add Custom Alert</a>	<a href="#">Import Custom Alerts</a>
Details	First Name	Last Name	Building Scope	Expiration Date	Options		
	Tina	Jones	All Buildings	07/31/2016			

4. On the **Custom Alert Detail** workspace, use one of the following methods to specify the information about the person for whom you are creating a custom alert:

### Alert Settings

Sex Offender Custom Emergency Buttons Instant

[Custom Alerts](#) > Custom Alert Detail



First Name \*

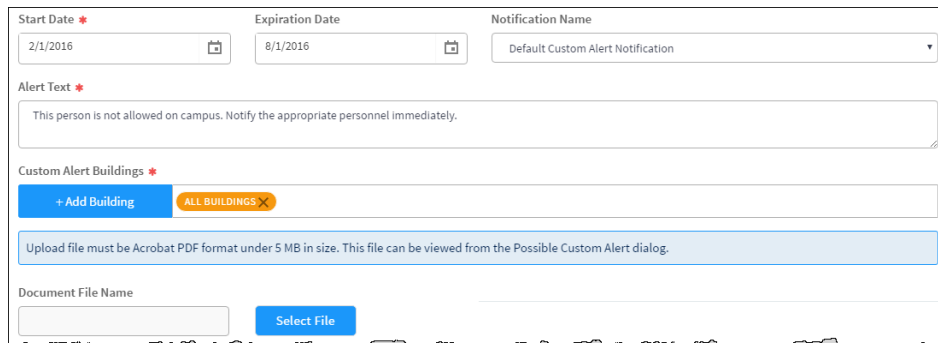
Middle Name

Last Name \*

Date of Birth

First Name Alias

- **Find** – If the person has previously signed in to the building, enter their name (or a portion of their name) in the text box and click **Find**. If more than one record is returned, click the **Select** icon to display their information in a Detail view.
  - **Manual Entry** – If the person has not previously signed in to the building, manually enter the person's information in the following fields:
    - ◆ **First Name** – Enter the first name of the person in the alert.
    - ◆ **Middle Name** – Enter the middle name of the person in the alert.
    - ◆ **Last Name** – Enter the last name of the person in the alert.
    - ◆ **Date of Birth** – Select the date of birth from the calendar.
    - ◆ **First Name Alias** – If the person in the alert is known by another first name, enter it in this field.
5. Enter the alert information:



- **Start Date** – Select the date from the calendar to indicate the date the alert should become active.
- **Expiration Date** – Select the date from the calendar to indicate the date the alert should become inactive. If left blank, the alert will not be expired until you enter an expiration date or delete the alert.
- **Notification Name** – Select the notification that contains the default notification message and who to notify.

**Note** If you want notifications to be sent when the alert is issued, you must complete the information in the Custom Alert Notification prior to adding the custom alert.

- **Alert Text** – Enter the information that displays in the **Notes** field on the Possible Custom Alert. This is the information that is visible to the Entry Admin when signing in the person.
  - **Custom Alert Buildings** – Click **Add Building** and select the buildings where the alert is active.
6. If you want to upload and associate a document with the custom alert so that document is available to the Front Desk operator when there is a positive match, click **Select File**, navigate to the PDF document, and click **Open**. The file is uploaded and the document name displays in the **Document File Name** field.

If the document is no longer relevant and you want to remove it, click **Delete File** (the **Delete File** button only displays if there is a document uploaded).

7. In the **Courtesy Notification** area, enter the following information for external notification when the alert is triggered:



The screenshot shows a form titled "Courtesy Notification" with four input fields: "Name", "Email", "Text Messaging Phone", and "Relationship". Below the fields are two buttons: "Save" (in blue) and "Cancel" (in grey).

- **Name** – First and last name of the person to be notified.
  - **Email** – If preferred method of contact is email, enter their email address.
  - **Text Messaging Phone** – If preferred method of contact is text message, enter their mobile phone number.
  - **Relationship** – Enter their relationship.
8. Click **Save**.

A confirmation message displays in the lower right corner of the screen indicating the alert was successfully added.

## Import Custom Alerts

Administrators with the *Can Manage Alerts* permission can also import custom alerts, which provides the flexibility to configure multiple custom alerts in one process. The import utility also includes the ability for unattended import of custom alerts by creating a manifest file that includes information about the field mapping and file to be imported.

**Note** To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

The file can contain the following custom alert information to be imported:

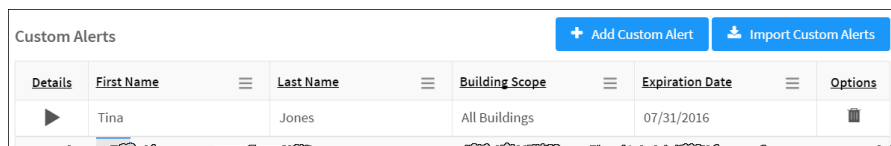
- First Name\*
- Middle Name
- Last Name\*
- Date of Birth
- First Name Alias
- Start Date
- Expiration Date
- Alert Text\*

- Building Name (If you are importing at the All Buildings level.)
- Courtesy Notification – Name
- Courtesy Notification – Email
- Courtesy Notification – Text Messaging Phone
- Courtesy Notification – Relationship

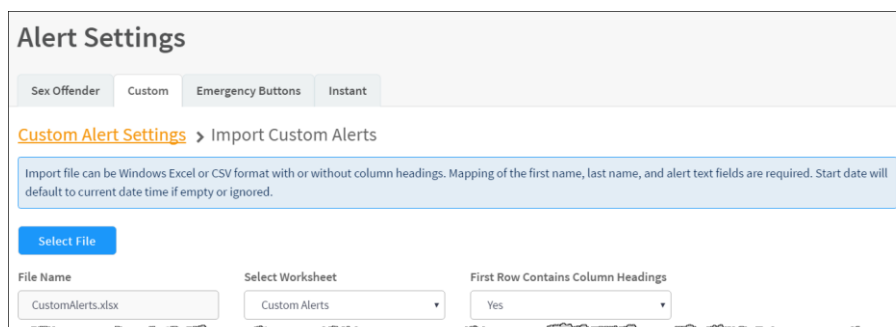
\*Indicates required information.

Perform the following steps to import custom alerts.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click **Import Custom Alerts**.



4. On the **Import Custom Alerts** workspace, click **Select File** and navigate to the location where the file is saved on your computer.



5. Select the **Excel** or **CSV** file and click **Open**.
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the custom alert information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.

- Map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

**Note** First Name, Last Name, and Alert Text are required columns. The columns with **Ignore** selected will not be imported.

Map Fields For Import (Not all data to import is shown)

Last Name	First Name	Date Of Birth	Alert Text	Building Name
ABSHIRE	JOHN	29-Oct-1982	This person is not allowed in the school.	All Buildings
ACKERMAN	WILLIAM	19-Jan-1957	This person is not allowed in the school.	All Buildings
ACTION	ROBERT	20-Sep-1965	This person is not allowed in the school.	All Buildings

Queue Import Cancel Import

- If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility.
- Click **Queue Import**.

A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing. When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

## View All Custom Alerts

You can view all the custom alerts that have been set up for a specific building or all buildings from the **Alert Settings > Custom** tab.


- In the navigation menu, select **Admin > Alert Settings**.
- Click the **Custom** tab.
- View the alerts under **Custom Alerts**.

Custom Alerts + Add Custom Alert Import Custom Alerts


Details	First Name	Last Name	Building Scope	Expiration Date	Options
▶	Tina	Jones	All Buildings	07/31/2016	🗑️

- Click the ▶ icon to expand the **Custom Alert Detail**.

## Edit Custom Alert


**Note** If a custom alert has the  icon in the **Options** column, it was created at a district level and can only be modified when the Building Selector is set to All Buildings.

Perform the following steps to modify a custom alert:


1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click the  icon to expand the **Custom Alert Detail**.
4. Modify any of the fields and then click **Save**.

**Note** If you want to disable an alert but not delete it, change the **Expiration Date** to the current date or prior date.

## Delete Custom Alert

**Note** If a custom alert has the  icon in the Options column, it was created at a district level and can only be deleted when the Building Selector is set to All Buildings.

Perform the following steps to delete a custom alert:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, locate the alert in the list that displays and click the  icon in the **Options** column. The alert is deleted and will no longer be referenced during sign in.

## Specify Custom Alert Notifications

You can specify recipients of a custom alert notification and the message that is sent in the notification. This information can then be referenced in the alert detail so that the notification is sent when the custom alert is issue.

**Note** Contacts must be defined prior to setting up notifications.



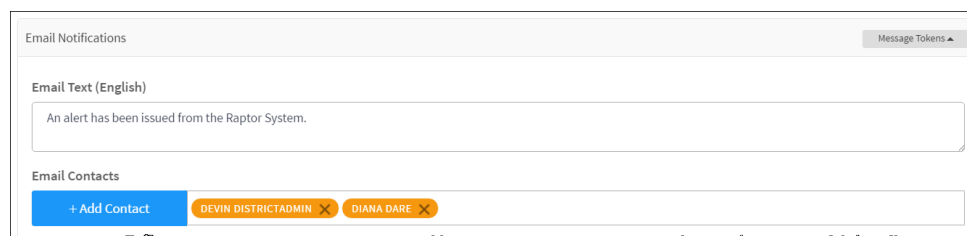
Perform the following steps to set up the custom alert notifications:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab and navigate to the **Custom Alert Notifications** area.

Custom Alert Notifications		
Details	Notification Name ↑	Building Scope
▶	Default Custom Alert Notification	All Buildings

3. Click the ▶ icon to expand the **Notification Detail**.
4. Specify the following information and then click **Save**.

## Email Notifications



The screenshot shows the 'Email Notifications' configuration page. It includes a 'Message Tokens' dropdown, a text area for 'Email Text (English)' containing the message 'An alert has been issued from the Raptor System.', and an 'Email Contacts' section with a '+ Add Contact' button and two existing contacts: 'DEVIN DISTRICTADMIN' and 'DIANA DARE', each with a close 'X' icon.

- **Email Text** – The email message is pre-populated with a default message using message tokens but you can change this message if desired.
- **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

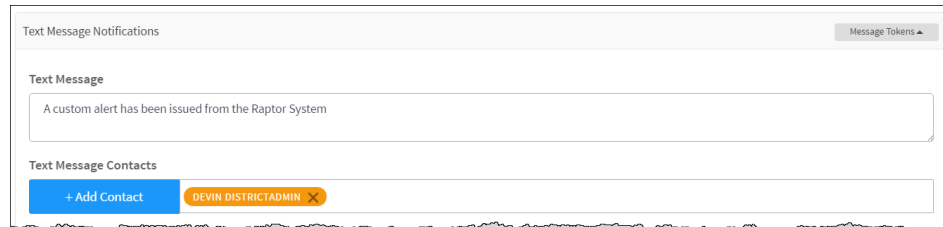
**Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

To remove an email contact, click the **X** in the contact label.

**Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

## Text Message Notifications



- **Text Message** – The text message is pre-populated with a default message using message tokens but you can change this message if desired.
- **Text Message Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the text message notification. Only those contacts that provided a text message phone can be selected.

**Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

To remove a text contact, click the **X** in the contact label.

**Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

## Message Tokens for Custom Alert Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be entered in the message.

<p>%CLIENTNAME% - District Name          %BUILDINGNAME% - Building Name          %USERFULLNAME% - User's First and Last Name          %CUSTOMALERTTEXT% - First 90 characters of the Custom Alert text          %ALERTFULLNAME% - Visitor's First and Last Name          %JUSTIME% - Time Logged - hh:mm:tt          %JUSTDATE% - Date Logged - MM/DD/YYYY</p>
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**Example:** An alert has been issued by %USERFULLNAME% at %CLIENTNAME% %BUILDINGNAME% on %JUSTDATE% at %JUSTTIME