History Reporting: Knowing When a Document is Added to an Event
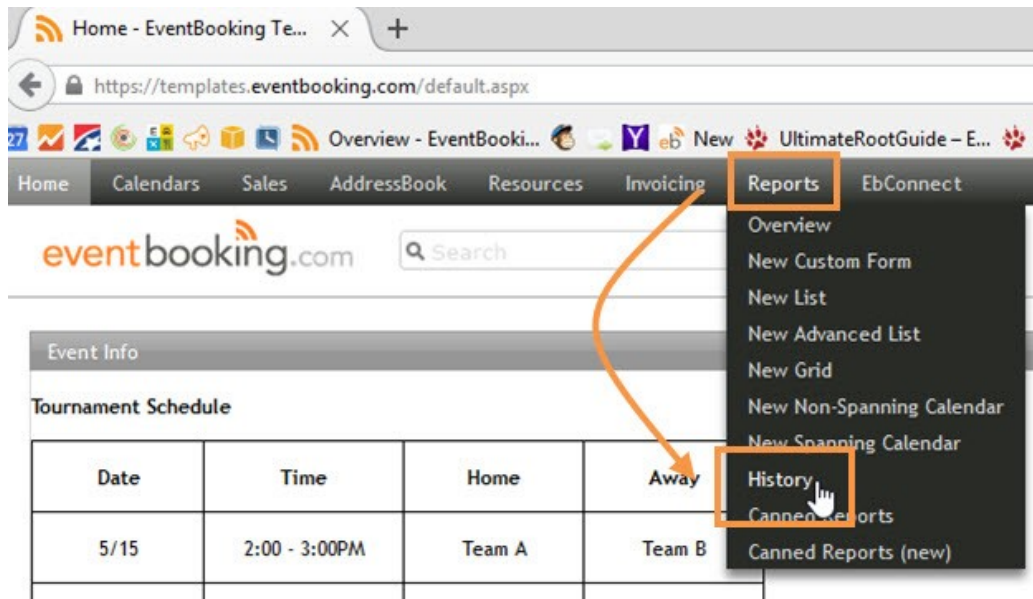
Updated: October 22, 2015

You are able to create a history preset which searches for events which have had documents attached within a certain time frame, for example, within the past week or month.

This preset can also be used to receive an email alert whenever a document is attached to an event.
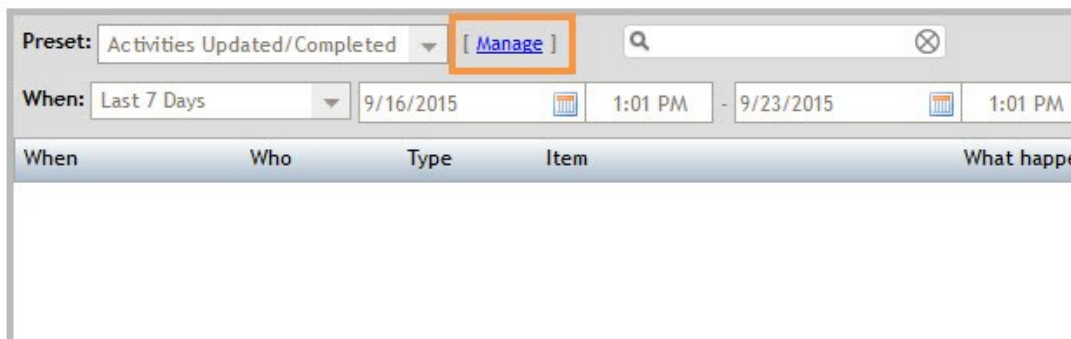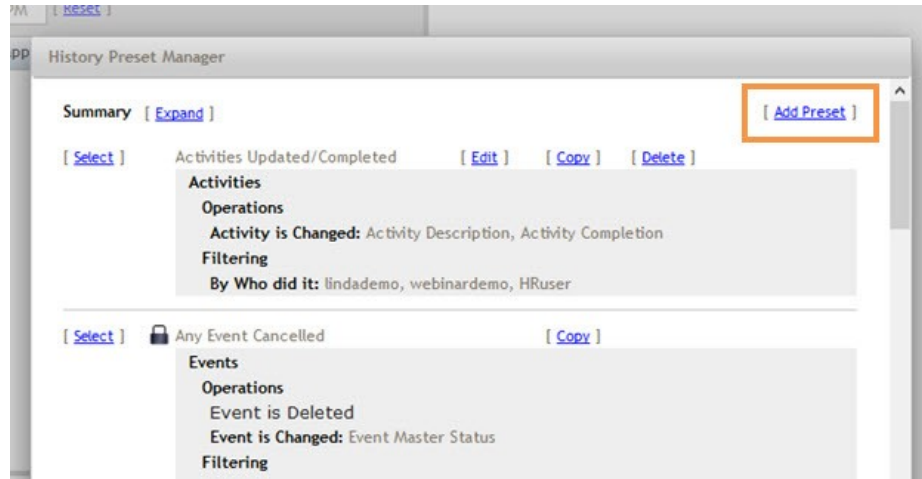
CREATING THE HISTORY PRESET

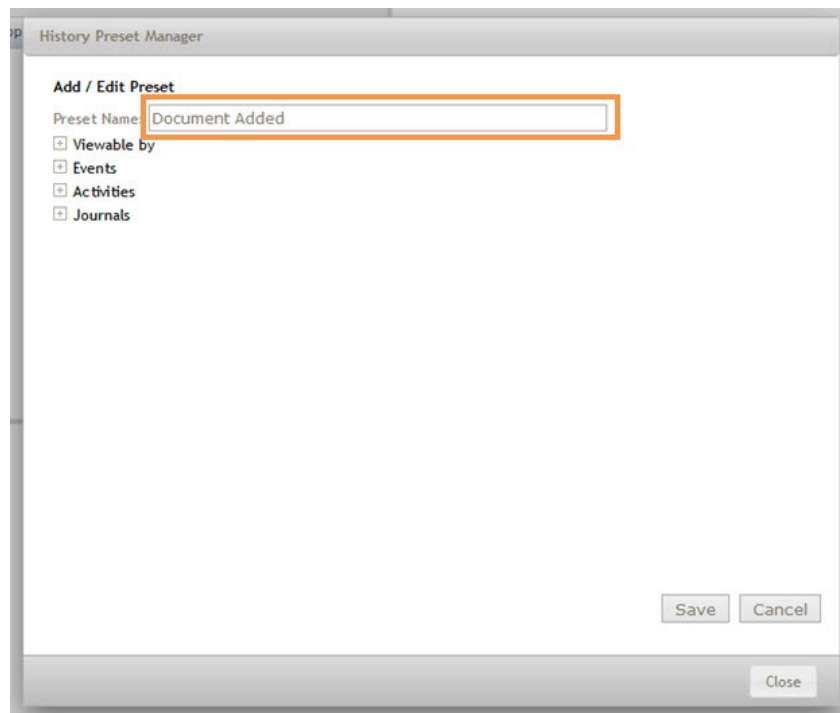1. Hover over *Reports* and click on *History*.

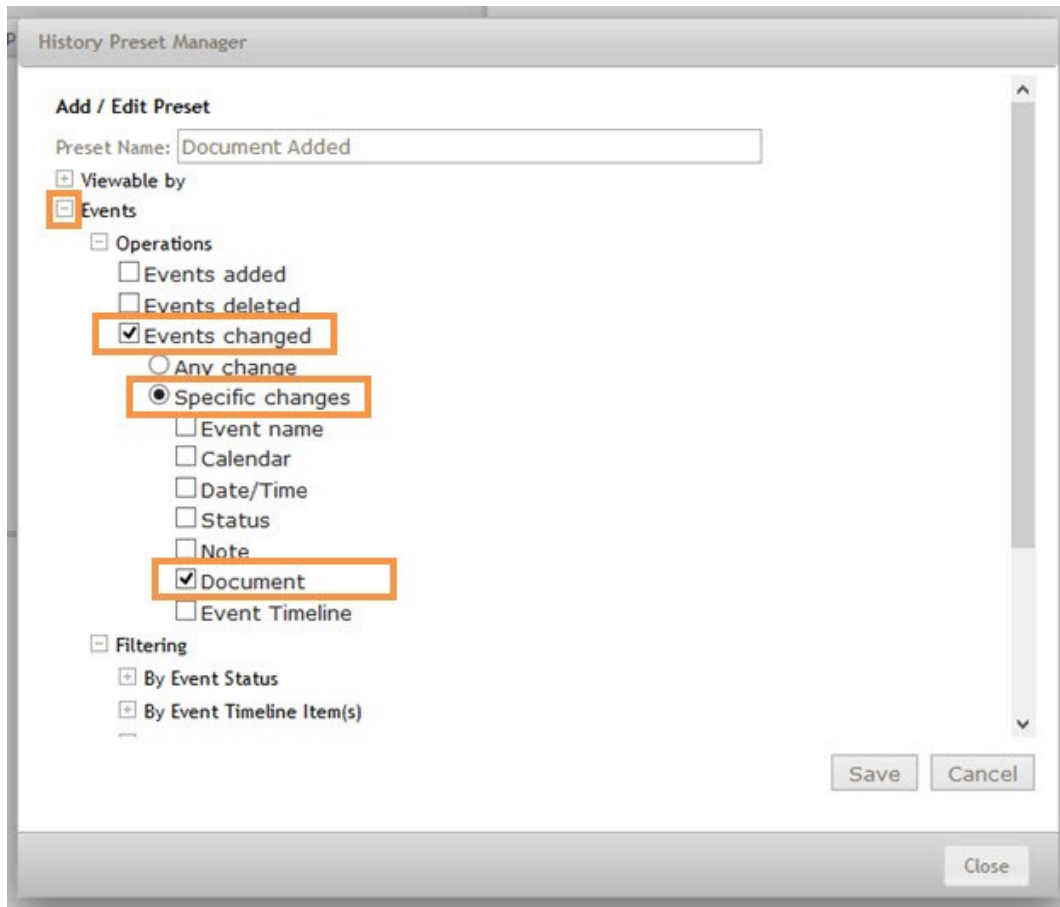2. Click the blue *Manage* link to open your history preset manager.

3. Click *Add Preset* in the upper right corner of the pop up.
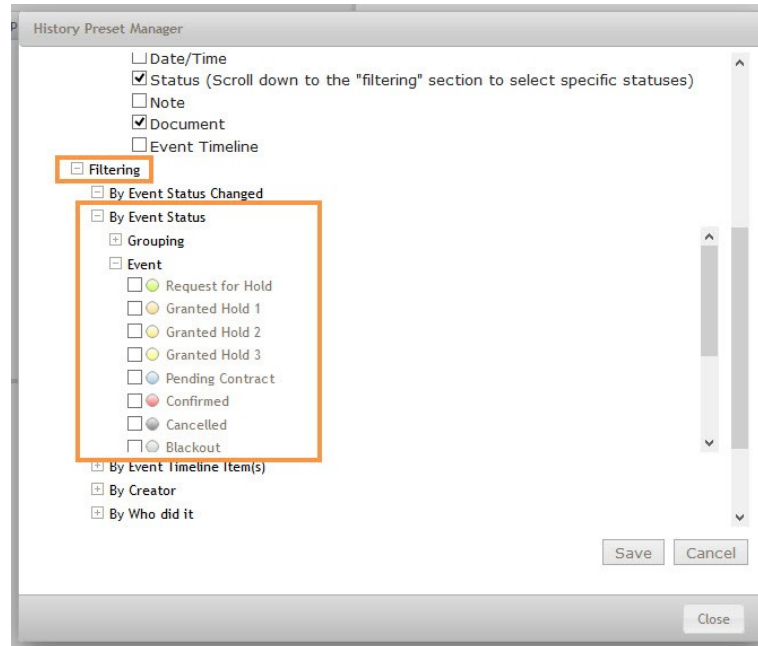

4. Name your preset.

5. Click on the plus by *Events* to expand the menu and choose *Events changed*, then choose *Specific changes*, then choose *Document*.
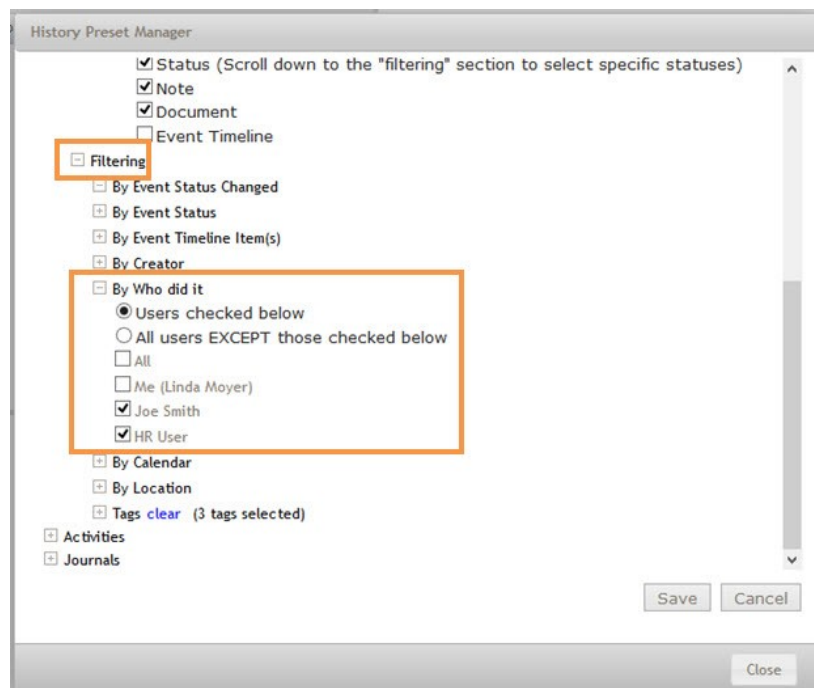

6. If you would like to receive an alert when a document is uploaded to any event, click *Save*. You can then run your history report or create an alert.

7. You are also able to select only certain events to receive alerts about. To see the options, click on the plus by *Filtering*. For example, you can:

- Filter by the status of the event:

- Filter by who added the document:

- Filter by the Event Type, or other tag group:

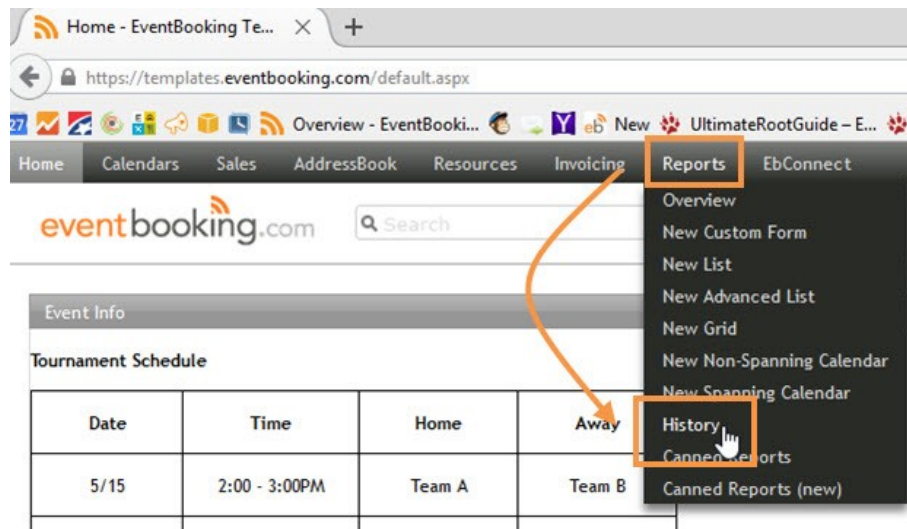8. Once you have selected your filtering options, click *Save*. Your preset has been created.
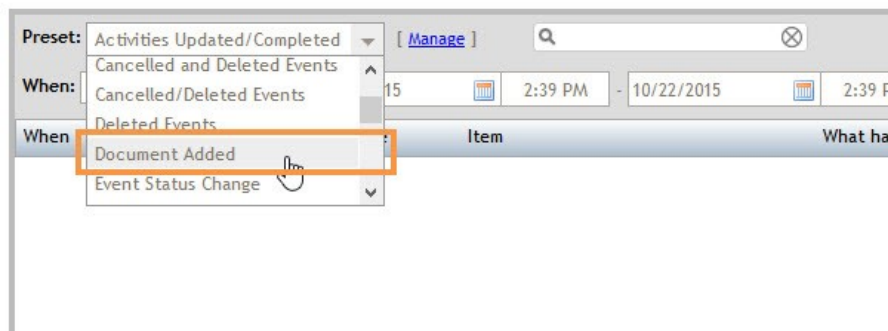
RUNNING A HISTORY REPORT

To search for events to which documents have been added:

1. Go to History > Reports.

2. Choose your history preset from the *Preset* drop down.

3. Choose your date range. You may search the last 7 days, last 30 days, or choose *Specific Date Range* to be able to select a specific date range using the date picker (you are limited to a 31-day span in each search). Once you have chosen your date range, click *Search*.

4. Events which had documents added within your time frame will be listed.

6. To export your search results to Excel, click the Excel icon by the *Search* button.

CREATING AN ALERT

If you would like to receive an email alerting you when a document has been added to an event, you can create an alert using your history preset. You may choose to receive the email when the document is added (you'll receive the alert within about 20 minutes) or a batch report daily, weekly, or monthly.

1. Hover over your name in the upper right corner of your account and click *My Settings*.
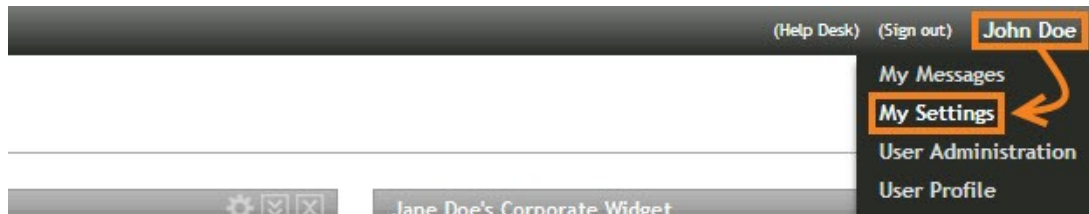
2. On the left side of your browser window, click *Alert Options*, then click *Create*.
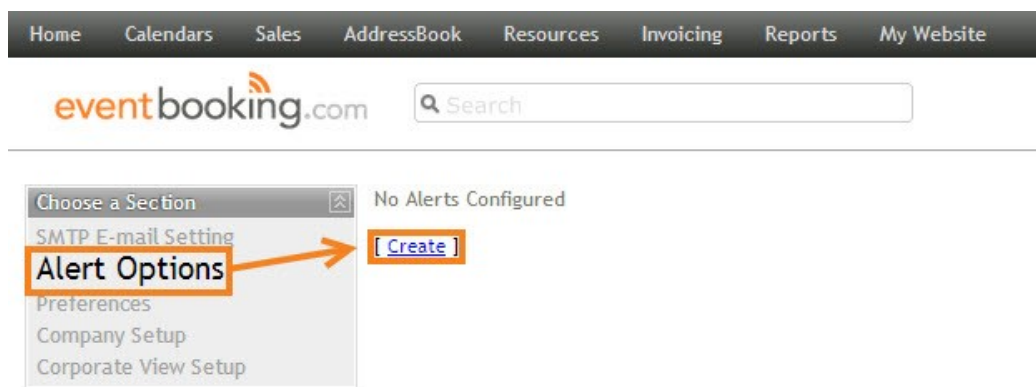
3. Name your alert, and then choose your history preset from the drop down menu.

4. Choose the email address where you would like to receive the alert. You are able to add additional email addresses to your account (for instance, a distribution list such as "sales@yourvenue.com") in your User Profile.

5. Choose how often you would like to receive the alert: *Immediately* (usually within 20 minutes of the event being deleted) or a digest email at a specified time. If you choose *Specified time*, set your start date, the time you would like to receive the alert, and your repeat interval. Click *OK*, then click *Save*.

6. Your alert has been created.