

## FAQ – How do I create an alert based on a date field?

If you wish to create an alert based on a date field, you can do this by creating a 'rolling' date statistic and then linking an alert to this. For example, you might want to create an alert if a Staff member's DBS expiry date falls within the next 3 months, or if a Participant's appointment date falls within the next 7 days.

There are two stages to follow to create an alert of this type:

### Stage 1 – Create a rolling statistic based on a date field

- Hover over *Intelligence* and select *Statistics*
- Click on the + icon to add a new statistic 
- Select the type of statistic that you wish to create by clicking on the **eye** icon to the right of the relevant section. For example, if you wish to create a statistic based on a 'Staff' date field, you would select the icon next to 'Staff' 
- Click *Next*
- Click on the + icon to add a statistic filter 
- Under *Type*, choose the area of the system that the field exists in. Under *Field*, choose the name of the field that you wish to base the alert on (e.g. 'DBS Expiry Date'). Under *Operator*, choose 'is rolling'

Filter ^

Type \*

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Field \*

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Operator \*

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- Under **Value**, choose either **Today** (for alerts based on dates that fall on today's date), **Previous** (for dates that fall in a past period) or **Next** (for dates that fall in a future period). For example, if you wish to be alerted when a date field falls within the next 3 months, you would choose '*Next – 3 months*'

Value \*

Today  
 Previous  
 Next

- Click **Save**
- Click on **Details** from the tabs on the left and then click on the *pencil* icon on the right-hand side 
- Enter a useful name for the statistic (e.g. “*DBS Expiry Date falls in the next 3 months*”) and then click **Save**

## Stage 2 – Create an alert based on the statistic

- Hover over **My Account** and select **Alerts\***
- Click on the **+** icon to add a new alert 
- Enter a useful name for the alert (e.g. “*DBS Expiry Date falls in the next 3 months*”)
- Under **Notification Method** choose either **Views Notification** (to receive an in-system alert) and/or **Email Notification** (to receive an email alert)
- Under **Frequency** choose how frequently you wish the system to check if the statistic has been triggered
- Under **Method** choose **Statistic** and then click **Add**
- Under **Statistic** choose the saved statistic created in Stage 1 and then click **Save**

You will now receive an alert whenever this statistic is triggered.

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\* If **Alerts** does not appear in this list, your account Administrator needs to enable this tool by selecting ‘*My Account – Administration – Alerts – Enabled – SUBMIT*’