



# GeniusMethods

**Alert and Document Control  
Screen Shots and Examples of Report**

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# Input of Criteria for later alert

**Document Status and Importance**

Active  High   
Complete  Medium High   
In Progress  Medium   
Medium Low   
Low

**Document Hierarchy**

Section   
Category   
Document Type   
Access Level (1-5)  ?  
Location of Original Document

**Owner**

Owner Name   
Owner Email Address   
Email Address for review   
*Separate multiple email addresses with semi-colon e.g 'username1@domain1.com;username2@domain2.com' et cetera*  
Please provide a default email address   
*Please provide an email address to which notifications will default to* ?

**Document**

Document Name   
Document Reference   
Activity   
Identity   
Relationship   
Date document loaded   
Start date of validity of document  ...  
End date of validity of document  ...  
Review Date 1  ...  
Review Date 2  ...  
Document Notes   
*Add most recent comment at the top system will add Date, Time and User information*  
Upload File  Browse...



# Reporting and Alerts

- Documents ▼
- Filing Cabinet ▼ Manage Section ▼
- Users ▼ Manage Category ▼
- Manage Document Type ▼

From: CS Generic  
 To: Sharon Constancon; Nerene Vorster  
 Cc:  
 Subject: FW: ComplySoft Kite - Review document named Chad Morgan

From: [kite@complysoft.com](mailto:kite@complysoft.com) [SMTP:KITE@COMPLYSOFT.COM]  
 Sent: Monday, May 31, 2010 12:00:13 AM  
 To: [crbrenwal@sanctuarypersonnel.com](mailto:crbrenwal@sanctuarypersonnel.com)  
 Subject: ComplySoft Kite - Review document named Chad Morgan  
 Auto forwarded by a Rule

Dear

This document requires your attention.

**Document Reference**

**Activity**

The expiry date of this document      2010-09-17  
 Review date 1                                    2010-05-17  
 Review date 2                                    2010-05-31  
 Document Importance                        Medium Low  
 Document Owner                                Fiona Pratt

Please login to Kite and attend to this document reminder.

Regards

Kite Reminder Service  
 Delivered by ComplySoft Ltd

**Refine Results**  
 hold down Shift key to choose more than one within a drop down list

Document Name  Section  Document Name

Status  Category  Document Reference

Importance  Document Type  Activity

Owner  Access  Identity

No of Files  Location  Relationship

Validity Start Date Start Date End Date  
 Validity End Date Start Date End Date  
 Review Date 1 Start Date End Date  
 Review Date 2 Start Date End Date  
 Deleted

S	I	Section	Category	Type	End Date	Rev Date 1	Rev Date 2	Name	Reference	Activity	Identity	Relationship	Files	View	Edit	Del
A	H	Client Risk Assessments	First Review	Client AML Risk Assessment Review	30-06-2010	01-03-2010	01-06-2010	Client ABC	AML 6 mth Review				1			
P	M	Client Risk Assessments	First Review	Client AML Risk Assessment Review	28-02-2010	28-02-2010	05-03-2010	Murray Mac		Test			0			
A	M	Business Docs	Fin Statements	Y 2007		12-11-2009	13-11-2009	tet					0			