

Ticklers

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Ticklers:

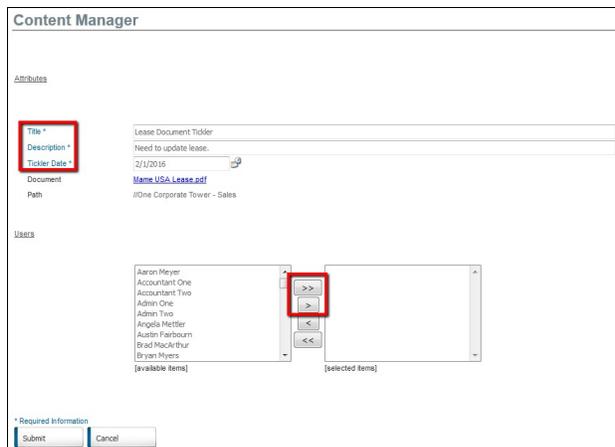
Ticklers send an email notification to the desired user(s) when the tickler date hits. This is helpful in the event where a document needs to be updated or removed on a certain defined date.

Note:

- Ticklers can only be added to a file and cannot be added to a folder.
- Ticklers must be added *after* the file has been uploaded. They cannot be added upon initial upload.

Adding a Tickler:

1. Go to **Control Panel > Document Library**.
2. Locate and click on **Edit** for the desired file.
3. Click on the **Ticklers** tab.
4. Click **Add** on the top right.
5. Fill in the **Title**, **Description**, and **Tickler Date**.
6. Under **Users**, add the desired users who need to receive these email notifications using the right arrow.



The screenshot shows the 'Content Manager' interface. Under the 'Attributes' section, there are three input fields: 'Title *' (containing 'Lease Document Tickler'), 'Description *' (containing 'Need to update lease.'), and 'Tickler Date *' (containing '2/1/2016'). Below these is the 'Document' field with the value 'Main USA Lease.pdf' and the 'Path' field with the value '//One Corporate Tower - Sales'. Under the 'Users' section, there is a list of users: Aaron Meyer, Accountant One, Accountant Two, Admin One, Admin Two, Angela Mettler, Austin Faribourm, Brad MacArthur, and Bryan Myers. A right arrow button is highlighted with a red box, indicating the action to add users to the tickler.

7. Click on **Submit**.

Editing a Tickler:

1. Go to **Control Panel > Document Library**.
2. Locate and click on **Edit** for the desired file.
3. Click on the **Ticklers** tab.
4. Click **Edit** for the desired tickler.



The screenshot shows the 'Document Library' interface. The 'Ticklers' tab is selected. A table lists the ticklers with columns for 'Title', 'Description', and 'Tickler Date'. The 'Edit' button for the first tickler is highlighted with a red arrow.

5. Make the desired changes and click on **Submit**.

Deleting a Tickler:

1. Go to **Control Panel > Document Library**.
2. Locate and click on **Edit** for the desired file.
3. Click on the **Ticklers** tab.
4. Select the desired ticklers using the checkboxes.
5. Click **Remove** on the top right.



Note:

- The **Delete** button on the bottom of the screen will delete the entire document from the Document Library. Do not use this button to delete a tickler and use the **Remove** link instead.