



Got it — I'll write this in the **help file style** you've been using for Costbars, so it reads like an in-app guide and matches the tone of your other documentation. I'll structure it in **four sections**: overview, entering threshold rules, testing & validating, and detailed settings reference.

Configuring Notification Thresholds and Alerts

Overview

The **Notification & Escalation Settings** in Costbars allow you to define exactly when a project's status will trigger an alert. This gives portfolio managers the ability to send timely, relevant notifications to executives and other stakeholders when projects begin to show risk indicators.

By combining **threshold rules**, **delivery preferences**, and **escalation paths**, you can make sure the right people are alerted at the right time, without overwhelming them with noise.

1. Entering Threshold Rules

1. **Open the Notifications Page** Go to **Admin** → **Notifications** from the main menu.
 2. **Add or Edit a Notification Profile**
 - Click **Add Notification** to create a new profile for a stakeholder.
 - Or, click **Edit** on an existing profile to adjust rules.
 3. **Set Core Contact Details** Enter the manager's name, phone number, and email address. This ensures alerts can be delivered across multiple channels.
 4. **Select the Primary Channel** Choose **SMS**, **Push Notification**, or **Email** as the main delivery method. Optionally, set a secondary channel as a backup.
 5. **Set Your Threshold Values** Under the **Thresholds** tab, enter numeric or selection-based values for each monitoring category (detailed in the table below).
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2. What the Rules Are

Threshold rules tell Costbars **when to trigger a notification** based on live project data. You can set limits for:

Rule	What It Monitors	Example Use Case
Days Overdue Threshold	Compares actual dates to planned baseline dates	Alert if a project slips more than 5 days
Budget Overrun %	Compares forecast cost to budget	Notify if costs exceed budget by 15%
Overall Health	Uses Green/Yellow/Red status from project data	Flag any project marked Red
Executive Commitment	Based on recorded executive support level	Alert if Comittment drops below "Strong"
Risk/Size/Complexity	Uses risk scoring from the project's detail form	Ignore small/simple projects; flag high-risk
Strategic Value %	Uses strategic scoring from portfolio analysis	Flag if value > 70% and project is at risk
Likelihood of Success %	Uses risk scoring from Costbars client	Flag if likelihood < 40%

3. Testing Your Configuration

Before enabling automatic delivery, always **test your rules**:

1. On the Notifications page, locate the **Notification Testing & Message Generation** section.
2. Click **Run Manual Test**. Costbars will:
 - Evaluate all active projects against your configured thresholds.
 - Show a summary of flagged projects and which managers would be notified.
 - Generate the exact notification message for each recipient.
3. Review results:
 - Check **Flagged Projects** to confirm they match your expectations.
 - Preview messages to ensure clarity and relevance.
4. If results are too noisy or too quiet, return to the thresholds tab and adjust values.
5. Once satisfied, leave the profile **Active** to allow automated alerts.

4. Detailed Settings Reference

Basic Info Tab

- **Manager Name / Email / Phone** – Required contact details for delivery.
- **Timezone** – Aligns delivery windows to recipient's local time.

Preferences Tab

- **Primary Channel** – Main delivery method (SMS, Push, Email).
- **Secondary Channel** – Backup channel if the first is unavailable.
- **Quiet Hours Start / End** – No notifications sent during this time (except executive escalations).
- **Business Hours Only** – Restrict non-critical alerts to working hours.
- **Weekend Notifications** – Allow or block weekend sends.
- **Cooldown Hours** – Minimum time between alerts for the same recipient.
- **Max Notifications Per Day** – Limit the number of alerts in 24 hours.

Thresholds Tab

See the rules table above for each metric's meaning and how it's used.

Escalation Tab

- **Enable Escalation** – Turns on SMS to executives for critical projects.
- **Escalation Delay Hours** – How long to wait before escalation after primary alert.
- **Max Escalation Attempts** – How many times to retry escalation.
- **Escalation Phone** – Destination number for executive escalation.

Best Practices

- Start with **looser thresholds** and tighten them once you've observed real-world behavior.
- Use **Manual Test Mode** frequently when changing thresholds.
- Keep **executive escalation** reserved for high-impact projects to maintain credibility of alerts.
- Document your chosen settings so your team understands the logic behind alerts.

If you want, I can now **merge this into your existing Costbars help file** from the other chat so the style, formatting, and navigation links match perfectly. That way it's a seamless addition. Would you like me to do that next?