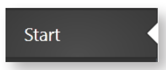
Quick Start Card

# BI Office Alerts

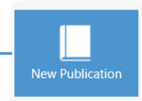
BI Office **Alerts** allow users to design data driven, automated notifications based on analytics and reports. These can be published to either feeds in the Backstage, or to an inbox in an email and can also be dynamically distrubted to suit organizational needs.

## New Alert

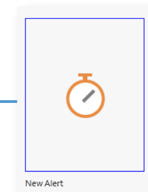
**Click Start** From the backstage in the main client.




Choose **New Publication**.

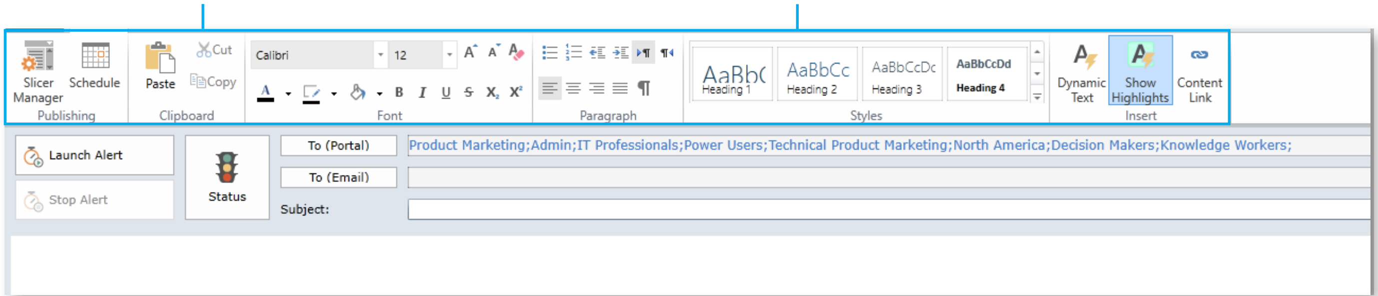



Select **New Alert** to get started.



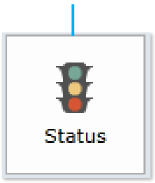

Notice the new alert **template** open up. This is where the alert message will be composed.

The ribbon contains **publishing** options, **text formatting** functions, **Dynamic Text,** and **Content Link** options.



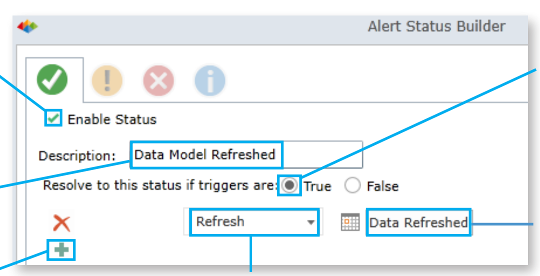

## Create a Basic Alert

From the ribbon, select the **Status** button. This is where the condition will be set to activate the alert to send the message.




Enable the Status for the **Green** Check Mark.

Add a **Description**.

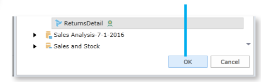



Click the plus sign to add a new **trigger**.

Select the **Refresh** trigger from the dropdown list.

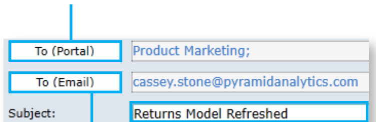
Select **True** to enable the trigger to send out a message when the model is refreshed.

Click on **Data Refreshed** and browse to the desired model. Click **OK**.




## Setup the Distrubtion

Click on **To (Portal)**. Select which roles the alert will distrubute to.

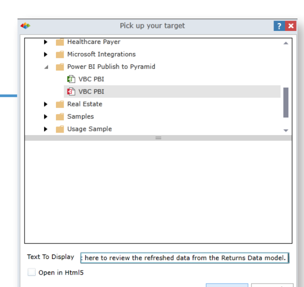



Optionally send to email address(es) Click on the **To (Email)** button.

Give the alert a **Subject**.


From the ribbon, click **Content Link**. This will add a link to the content built from the model. Users can click on it to review the newly refreshed data from the model.

Browse to a **dashboard** built from the specific model. Then enter text to give **direction** to users. Click **OK** to attach the dashboard.

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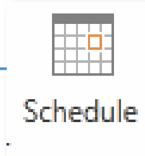
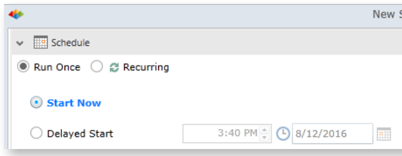
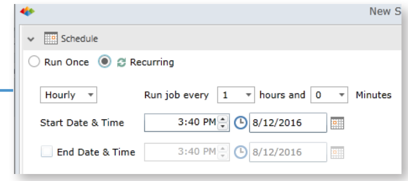
# Schedule the Alert

From the ribbon, click on the **Schedule** button to schedule the alert.

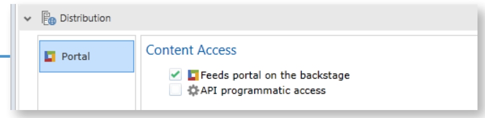



Under **Schedule** choose either **Start Now** to run the alert right away, or to run on a schedule select **Recurring**.

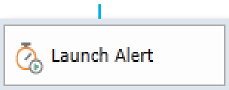



Under **Distribution** select **Feeds portal on the backstage** as the distrubtion meathod. Click **OK.**

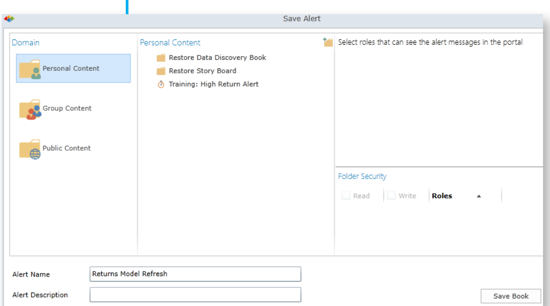



# Launch the Alert

From the ribbon, click on the **Launch Alert** button**.**

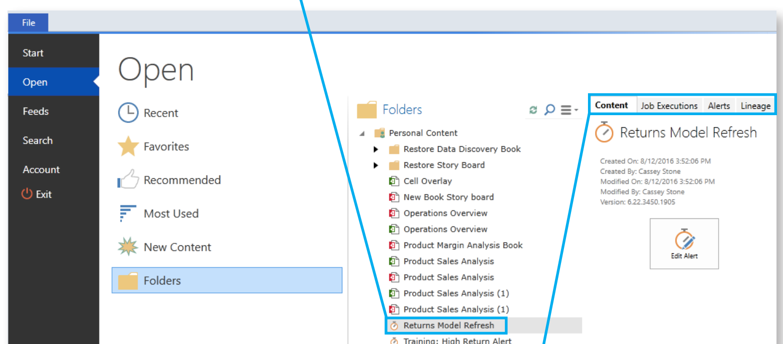



**Save** the alert to the **Personal Content folder**. **Name** the alert and click **Save Book**.




# Confirm the Alert

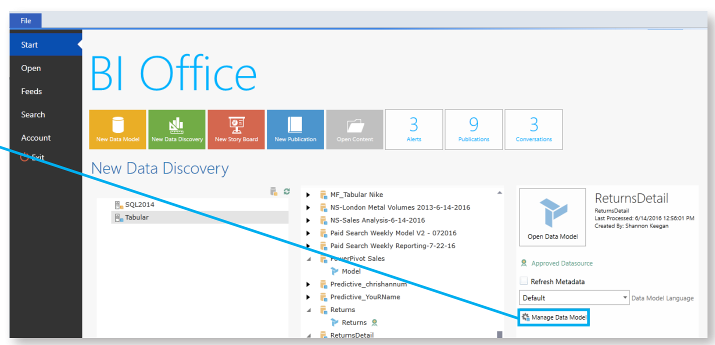
Navigate to the Backstage. From the **Open** tab, click on **Folders**. Open the **Personal Content** folder and notice that the alert now appears.



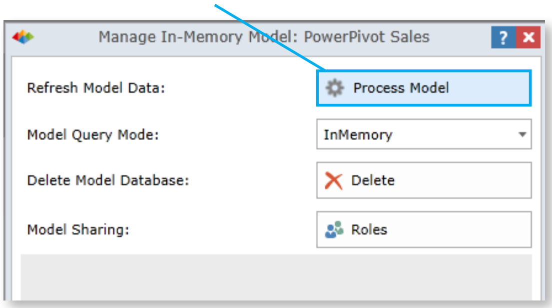

From this view, **verify** the alert, view the **Job Executions**, view the **output** of the alert, and check the **lineage** to verify the content and users.

# Process the Alert

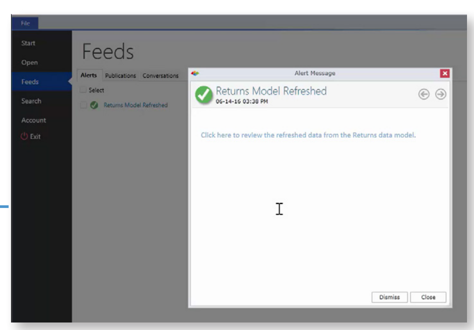
From the **Start** tab, select **New Data Discovery**. Nagivate to the slected data model, then choose **Manage Data Model**.




Click the **P**rocess **Model** button.




Navigate to the **Feeds** tab to view verify the alert was successfully created with the preferred status icon. Click on the **alert** to view the message.

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