

Practice Activity Alert

Process Automation

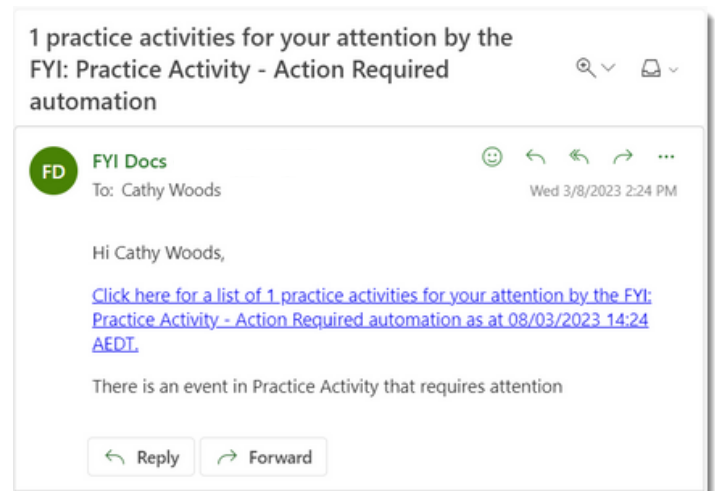


About this automation:

Use these processes to automatically send an alert to a user notifying them of any Failure and Action Required events in the Practice Activity workspace.

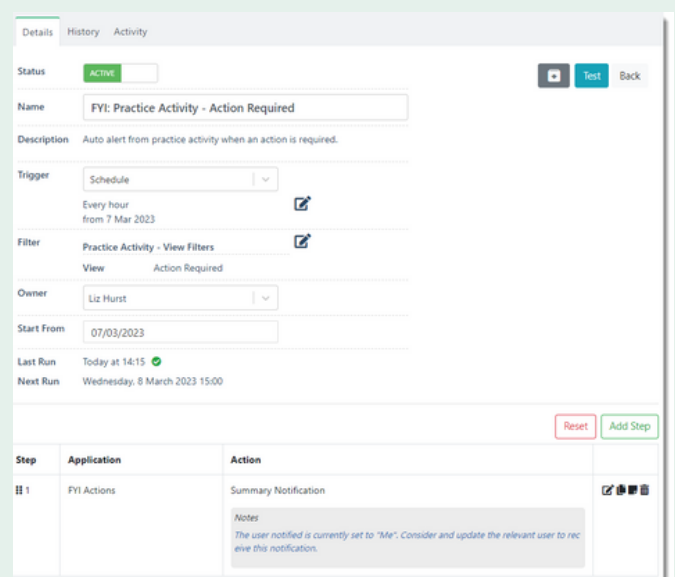
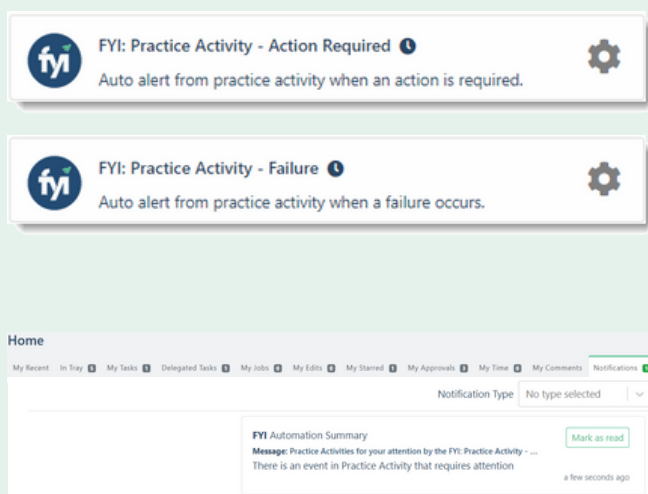


Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

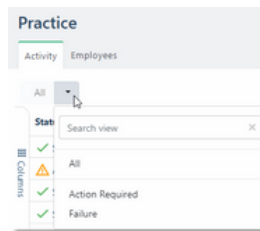
- ✓ Automation Process Steps



How to import:

Before you begin, ensure your Views have been saved in Practice - Activity with the following filters:

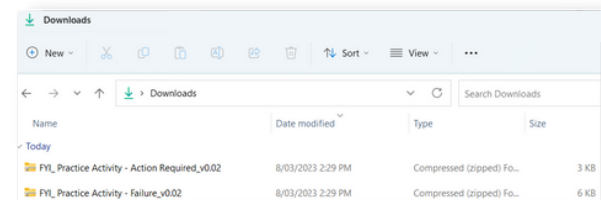
- "Action Required" View
 - Status = Action Required
- "Failure" View
 - Status = Failure



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

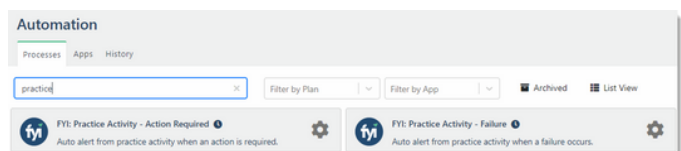


Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Practice Activity - Action Required" and "Practice Activity - Failure" files and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



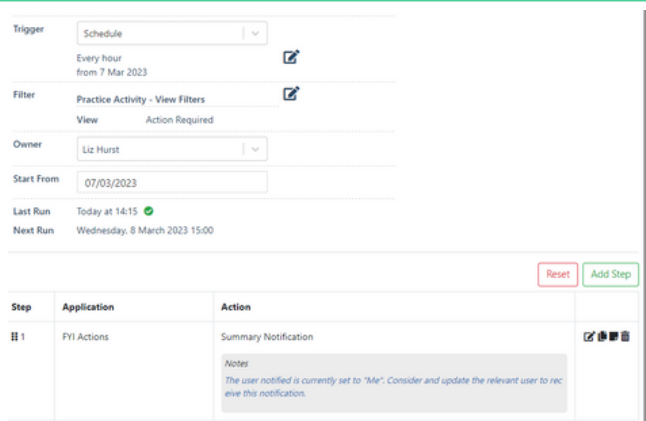
Step 3 - Review the process

Processes are imported with the Status set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

These processes use the Action Required and Failure Views, which are the custom views you created in the Practice Activity workspace.

- Review the schedule
- Review the process owner
- Review and update each process step.



Step 4 - Test and activate

Click the Test button to display a list of practice activity events.

Search and select a specific activity to run the test for and select Run Test.

Go to Home - Notifications and review the summary notification received. The notification will be sent to the specific user selected in the automation.

When ready, set the Status to Active:

- This automation is set to run automatically every hour from the commencement date.
- Users can receive notifications in FYI and also via Email or Teams. This is based on the Notification Mode enabled in My Settings.

