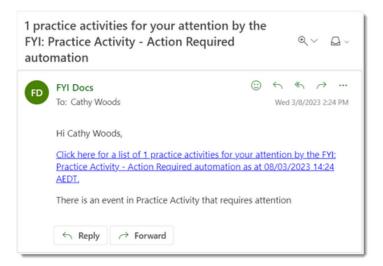
# **Practice Activity Alert** Process Automation



## 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

fyi	FYI: Practice Activity - Action Required (	<b>a</b>	Details History Activity			
	Auto alert from practice activity when an action is required.	T	Status	ACTIVE		Test B
			Name	FYI: Practice Activity - Ac	tion Required	
	FYI: Practice Activity - Failure 🕚		Description	n Auto alert from practice activity	when an action is required.	
	Auto alert from practice activity when a failure occurs.	- <del>-</del>	Trigger	Schedule	v	
-	note deriver a tange decivity when a failure decide.			Every hour from 7 Mar 2023	ß	
			Filter	Practice Activity - View Filters	ľ	
			Owner	View Action Required		
				Liz Hurst		
me			Start From	07/03/2023		
Recent In Tray 🚺	My Tasks () Delegated Tasks () My Jobs () My Edits () My Starred () My Approvals () My Time () My Com Notification Type		Last Run Next Run	Today at 14:15 O Wednesday, 8 March 2023 15:00		
	FYI Automation Summary Message: Practice Activities for your attention by the PY: Practice Activity	Mark as read				Reset
	There is an event in Practice Activity that requires attention	a few seconds ago	Step	Application	Action	
			81	FYI Actions	Summary Notification	C (
					Notes The user notified is currently set to "Me". Consider and update the even this notification.	e relevant user to rec

## 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.

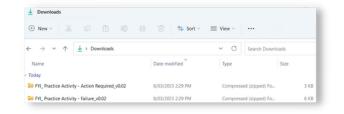
Search and select a specific activity to run the test for and select **Run Test**.

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.

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	AL	•	
	State	Search view	×
III Columns	$\sim$	All	
amins	1	Action Required	
	~	Failure	





Automation										
Processes Apps History										
practice	Filter by Plan	~ Filter by App		Archived	III List View					
FYI: Practice Activity - Action Required  Auto alert from practice activity when an action is requi	ired.	FYI: Practice Activ Auto alert from pr		• • • • • • • • • • • • • • • • • • •	urs.	\$				

