

Smart Task

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Overview

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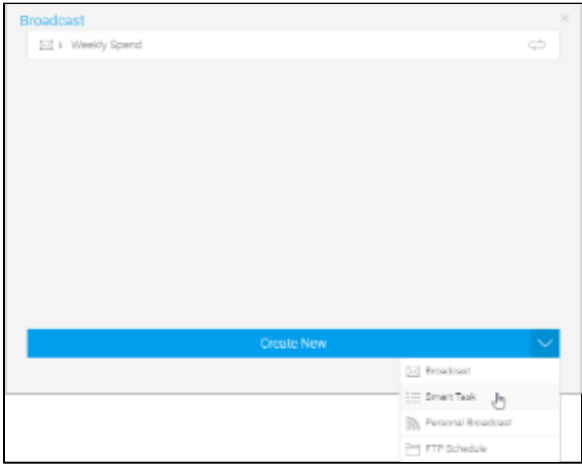
Rather than creating an email broadcast, you are able to schedule a task to be assigned to a user or group, attaching the report content to the task instead of an email.

1. Ensure your report is Active (not in Draft Mode)

2. Click the **Broadcast** button in the main navigation menu



3. Click **Create New** and select the **Smart Task** option.



4. The **Smart Task** window will open, providing you with the following options:

A form titled "Smart Task: Athlete Demographic Spread". It contains several input fields: "Title", "Requestor", "Task Description", "Assignee", "Subscribers", "User Prompt Filters", and "Current Filter Values". Below these is a section for "Alert-based broadcast" with a red border and a bell icon, containing the text "The report will be delivered based on the selected schedule, if the results match the alert rules." and a link "Add Alert Delivery Rules". At the bottom, there is a "Frequency:" section with dropdowns for "Weekly", "Saturday", "Australia", "Sydney (+11:0...", "12 ...", and ":00". A final "Add Alert Delivery Rules" button is at the very bottom.

Title, Requestor, Description

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1. Define a title for the task.
2. Select a user to be the requestor for the task.
3. Provide the text to describe the request for the task.

Title	Requestor
Task Description	

Assignee & Subscribers

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A task can only be sent if assignees have been defined.

1. Click in the **Assignee** box.
2. From here you are able to search through Yellowfin Users and Groups

User	A person that is a registered user of Yellowfin.
Group	A group of users that have been setup within Yellowfin. This option allows you to send a report to multiple users at once.

3. Once selected, your assignees will appear in the box.
4. You can then add users to the **subscribers** box, which will ensure that they are notified when the task is created, without assigning it to them.

Assignee

 Administrators

 Bill David

 Captain SysAdmin

 Jacinta Doze

 Jack Nimble

 Jessica Flower

All
People Only
Groups Only

Priority

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Define the priority of the task as Low, Medium, or High.

Filters

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If your report contains filters you will have the option to select which of these are applied to the Broadcast Report.

The options include:

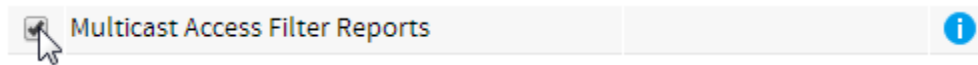
- Current Filter Values
- Default Filter Values
- Bookmarks

User Prompt Filters	Current Filter Values
What filter values would you like to use for the broadcast?	Current Filter Values Default Filter Values -- Bookmarks -- Male Youth 2015-6 Female Youth - 2015-6

Source Filters

If your report uses Source Filters, the Broadcast Report will also be filtered by the Source Filter, as well as whatever filters were defined above. If the report has been sent to an external email address, rather than a defined Yellowfin user, the recipient will inherit the Source Filter from the user who defined the Broadcast.

Note: in order for a user to Broadcast a Source Filter report to recipients not defined in the source filter, they will require the following role permission to be enabled.

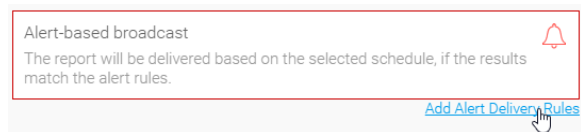


Delivery Rule

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A Delivery Rule is used for exception reporting. If you wish to send a report only if it meets certain criteria (for example: Revenue is less than 100,000) then you will need to add a rule.

1. Click on the **Add Alert Delivery Rules**
2. You will now have the choice of building a rule based on:
 - a. One or more rows must match (e.g. is there a transaction less than \$1000) OR
 - b. Aggregate against entire result set (e.g. are the total sales less than \$100000)
3. Select the field you wish to apply the condition on, click **Add Field**, and apply your condition. You can add multiple conditions here if required.
4. Click **Submit** to apply your condition(s)
5. Your rule will now be displayed on the Smart Task window



Schedule

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The last step is to define the schedule for your Broadcast

1. Select the **frequency**. Depending on the option selected here, you may be required to provide further details. For example, if Fortnightly is selected, you will be prompted to select either the first or second week of the fortnight to send in, as well as the day of the week.
2. Apply **Advanced Settings** (if required)
Sometimes you may find you need to set the Time Zone, and local time for delivery. This can be accomplished by clicking the **Advanced Settings** link.
 - a. **Timezone:** allows you to set the deliver timezone.

A screenshot of a configuration form titled "Frequency:". It contains several dropdown menus and input fields. The first row has "Weekly" and "Saturday" selected. The second row has "Australia", "Sydney (+11:00)", "12 ...", and ":00" selected. Below this, there are "Limit Schedule Period" and "Failure Notification" sections, both with toggle switches turned on. The "Limit Schedule Period" section shows "From 01/10/2016" and "To 05/03/2017". The "Failure Notification" section shows "Administrators" with a close button. At the bottom, it says "This will run every week, on Saturday." and there is a "Less" link with an upward arrow.

- b. **Limit Schedule Period:** allows you to limit the schedule to run only within a set period, rather than forever ongoing.
- c. **Failure Notification:** allows you to define an administrator user to be notified if the broadcast schedule fails.

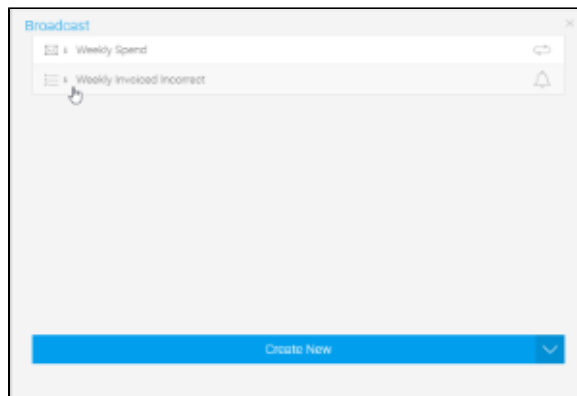
Submit

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1. Click the **Submit** button to complete the broadcast setup.



2. You will now see your broadcast listed.



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