

Wide Narrow User Guide

Personal Alerts

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Introduction

This User Guide provides step-by-step user instructions to the Personal Alerts features in Wide Narrow.

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About Personal Alerts

Personal Alerts are automated emails based on saved searches.

You can subscribe to Personal Alerts in Search and on Dashboards.

- On **Dashboards**, you find the Subscribe button on top of the post list widget.
- In **Search** you find the Subscribe button on top of the search result post list.

You can easily subscribe to a Personal Alert. Simply select an existing saved search or do a new search, and then press the Subscribe button to subscribe to your search.

When subscribing to a new search, the tool will automatically save your search.

Use the same Subscribe button to manage your Personal Alert subscriptions or unsubscribe.

You can schedule when you want to receive the Personal Alert.

Personal Alerts scheduled at the same time will be merged into a Combined alert.

You will only receive an email alert if and when there are posts matching your saved search.

User Access

All users can subscribe to Personal Alerts when the feature is enabled.

Benefits and Use Cases

The Personal Alert feature allows you to easily subscribe to any saved search and receive updates on that saved search by email on the schedule you decide.

This feature has many benefits and is helpful in several ways.

- You can stay up to date on your favorite topics without any hassle and get the latest information without having to search manually.
- On Dashboards, it allows you to receive email notifications based on the filters you've selected when filtering information on the post list or other Dashboard widgets.
- In Search, you can opt to receive email alerts with posts matching your search criteria and favorite topic instead of making manual searches each time you want to get an update on your search area.
- You can easily select a saved search from the saved search drop-down menu and receive email notifications with content based on that saved search.

Alternative and Supplementary features

Wide Narrow offers various features that can be used alongside or as an alternative to the Personal Alert feature.

Here is a brief overview of these features and how they relate to the Personal Alert feature. Feel free to follow our recommendations on when to use each function.

Automated Newsletters

Automated Newsletters are set up in the Newsletter module by Superusers.

Use automated Newsletters when you want to customize the Newsletter template and content for your target audience and when you want to control and manage recipients and send lists in an efficient way.

Automated newsletters are not suitable to set up for your personal email alerts.

Only Superusers and Superuser Admins can create Automated Newsletters.

Newsletter Subscription

Newsletters can be made available to all users of a Dashboard through the Newsletter Subscription widget.

The widget is enabled by Dashboard Owners and Writers.

When the feature is enabled, users can subscribe to selected Newsletters from the Dashboard.

Note that only users that are added as recipients to a Newsletter by the Newsletter Owner can view and subscribe to that Newsletter.

Category Subscription

The Category Subscription widget allows users to subscribe to a selected number of taxonomy categories directly from the Dashboard.

The widget is enabled by Dashboard Owners or Writers.

When enabled you can subscribe to any or all categories in the widget and receive e-mails containing qualified posts that match those categories on the schedule you decide.

All users can create Category Subscriptions when the feature is enabled on a Dashboard.

This feature is very similar to the Personal Alert feature, but there are some important differences:

- Category Subscriptions only allow one schedule for all subscriptions while Personal Alerts allows you to set individual schedules for each alert.
- Category Subscriptions are based on selected taxonomy categories while Personal Alerts allows the user to also subscribe to more advanced filter searches including keyword filters and other filter combinations.

How to subscribe to a Personal Alert

You can easily subscribe to a Personal Alert from Search and Dashboards. Simply do a search, and then press the Subscribe button to subscribe to your search.

Please find below the step-by-step user instructions for using the Personal Alert features.

GOOD TO KNOW

- If you forget to schedule your alert, it will be sent every Monday around 7am.
- Alerts scheduled at the same time will be merged into a Combined alert.
- You will only receive an alert if and when there are posts matching your saved search.

Subscribe from Search

You can subscribe to searches by using the Subscribe button in Search.

1. Navigate to Search
2. Use the filter options to filter the content.
You can, for example, enter a search query in the search bar, use the filter menu or select a ready to use saved search in the saved search drop-down. Your selected filter will display as black pills on top of the post list.
3. Click the Subscribe button on the right above the Post list.
4. Name the Personal Alert. This name will be the email subject of the alert and the name displayed on the Unsubscribe page and Subscription page in Wide Narrow.
5. Schedule the alert and click Save.

Subscribe from Dashboards

You can subscribe to searches by using the Subscribe button on Dashboards.

1. Navigate to Dashboards and open any Dashboard.
2. Use the filter options to filter the dashboard content.
You can, for example, click on the chart widgets, enter a keyword in the post list search bar or open the post list filter by clicking the filter button beside the Subscribe button.
3. Your selected filter will display as black pills on top of the post list.
4. Click the Subscribe button above the Post list.
5. Name the Personal Alert. This name will be the email subject of the alert and the name displayed on the Unsubscribe page and Subscription page in Wide Narrow.
6. Schedule the alert and click Save.

Subscribe from Embedded Dashboards

The Personal Alert feature may be enabled on Wide Narrow Dashboards that are embedded on other platforms such as Teams, SharePoint, or Salesforce, provided that your organization has **Single-Sign-On** (SSO) access to Wide Narrow.

You can subscribe to searches by using the Subscribe button on the embedded Dashboard.

1. Navigate to the embedded Dashboard.
7. Use the filter options to filter the dashboard content.
You can, for example, click on the chart widgets, enter a keyword in the post list search bar or open the post list filter by clicking the filter button beside the Subscribe button.
2. Your selected filter will display as black pills on top of the post list.
3. Click the Subscribe button above the Post list.

4. Name the Personal. This name will be the email subject of the alert and the name displayed on the Unsubscribe page and Subscription page in Wide Narrow.
5. Schedule the alert and click Save.

GOOD TO KNOW

- A user account is automatically created when someone subscribes to a Personal Alert from an Embedded Dashboard.

How to unsubscribe from a Personal Alert

You can easily unsubscribe from the Personal Alert email by clicking the unsubscribe button at the bottom of the alert email. You can also unsubscribe from Dashboards, Search, the Subscription page and the Unsubscribe page.

Unsubscribe from the unsubscribe link in the email Alert

All email alerts contain an “unsubscribe” link at the bottom of the alert. Use that link to opt-out from the received alert.

1. Click on the unsubscribe link in the email footer.
2. You will now be directed to an **Unsubscribe page** where you can see your unsubscribed alert at the top.

Additionally, on this page, you can see all your active alert subscriptions. Use the upper multi-action toggle button to unsubscribe from all your alerts at once or handle each subscription individually.

GOOD TO KNOW

- The Unsubscribe page is available without logging in to Wide Narrow.

Unsubscribe from Search

You can unsubscribe from Personal Alerts by using the Unsubscribe button in Search.

1. Navigate to Search
2. Open the saved search drop-down and click on the saved search you want to unsubscribe from.
3. Click the down arrow beside the Subscribed button and select Unsubscribe.

Optionally, click the down arrow beside the Subscribed button and select Manage subscription to be directed to the subscriptions page, where you can see and manage all your alerts and newsletter subscriptions. Under Personal Alerts, unsubscribe to any alert by clicking the toggle button to the right of the alert.

Unsubscribe from Dashboards

To stop receiving a Personal Alert, simply open the Subscribe drop-down menu on the Dashboard and choose the Unsubscribe or Manage Subscriptions option.

1. Navigate to a Dashboard.
2. When your search matches an active Personal Alert, a ringing bell appears.
3. Click the down arrow beside the Subscribed button and select Unsubscribe to unsubscribe from that alert.

Optionally, click the down arrow beside the Subscribe button and select “Manage subscriptions” to be directed to the Subscriptions page, where you can see and manage all your alerts and newsletter subscriptions. Under Personal Alerts, unsubscribe to any alert by clicking the toggle button to the right of the alert.

Unsubscribe from Embedded Dashboards

To stop receiving a Personal Alert, simply open the Subscribe drop-down menu on the Dashboard and choose the Unsubscribe option.

1. Navigate to the embedded Dashboard.
2. When your search matches an active alert, a ringing bell appears.

3. Click the down arrow beside the Subscribed button and select Unsubscribe to unsubscribe from that alert.

Optionally, click the down arrow beside the Subscribe button and select Manage subscription to be directed to the Unsubscribe page, where you can see and manage all your alerts. Use the toggle buttons to unsubscribe from all your alerts at once or handle each subscription individually.

GOOD TO KNOW

- The Unsubscribe page is available without logging in to Wide Narrow.

Unsubscribe from the Subscription page

You can view and manage all your alerts and newsletter subscriptions on the Subscription page. Unsubscribe from one or multiple Personal Alerts by using the toggle button.

1. Navigate to Subscriptions.
2. Under Alerts, unsubscribe to any alert by clicking the toggle button to the right of the alert.

On this page you can also change the schedule of your Personal Alerts.

Combined Alerts

If you subscribe to multiple Personal Alerts that are scheduled to be sent simultaneously, those alerts will be combined into a single alert. Each saved search will be presented under its own section in the email alert, with the name of the Personal Alert acting as the header.

TIPS!

- Set different time schedules for your Personal Alerts to receive them in separate emails.

Email Subject Line

The email subject is the first thing you see after the sender's name when you receive an email. It is usually a summary of the email's contents, and its purpose is to encourage people to open and read the email.

The email subject line for Personal Alerts works as follows:

- Personal Alerts containing only **one** saved search will have the **name of the saved search** as the email subject.
- Combined alerts containing **several** alerts (saved searches) will have either the portal name or a default name specified by a Portal Admin as the email subject.



TIPS!

- When you name your Personal Alert, make sure it works as a good email subject for your Alert.
- Combined Alerts will always have the portal name, or a name specified by a Portal Admin as the email subject name, and it is not possible to change by others.