Wide Narrow User Guide for Admins

Personal Alert Features

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Introduction

This User Guide for Superuser Admins provides step-by-step instructions on how to enable, create and manage the **Personal Alert** features in Wide Narrow.

Content

About the Alert features

Personal Alerts are automated emails based on saved searches.

The Personal Alert feature is available in Search per default and on Dashboards when enabled. Access to the Personal Alert feature on Embedded Dashboards requires SSO. Read more about activation under the Activation section below.

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

All users can **subscribe** to **Personal Alerts** by selecting a saved search or doing a new search, and then press the Subscribe button.

When the **Subscribe Others** feature is enabled, Superuser Admins can also subscribe others to Alerts by selecting the "Subscribe others" option in the Subscribe dropdown.

Users have the option to schedule when they wish to receive the alert.

Personal Alerts scheduled at the same time will be merged into a **Combined alert** with separate post list sections for each saved search. Each section will be distinguished by a headline with the name of the respective saved search alert.

Superuser Admins can customize the Alert template on the Alert template page in Admin. All alerts sent from the portal have the same template.

When a user subscribes to a new search, the tool automatically saves and adds the new search to the saved search dropdown.

The Subscribe button can also be used to manage subscriptions or unsubscribe. Users can also unsubscribe at any time by clicking the unsubscribe link in the alert email or navigating to the Subscription page.

Users will only receive an email alert when there are posts that match their saved search criteria.

Benefits and Use Cases

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

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

- Users can stay up to date on their favorite topics without any hassle and get the latest information without having to search manually.
- On Dashboards, it allows users to receive email notifications based on the filters they've selected when filtering information on the post list or other Dashboard widgets.
- In Search, users can opt to receive email alerts with posts matching their search criteria and favorite topic instead of making manual searches each time they want to get an update on their search area.
- Users 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 and Subscribe Others features.

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

Automated Newsletters

Automated Newsletters are set up in the Newsletter module.

Automated Newsletters are the best option when you wish to:

- Customize the newsletter template for your target audience.
- Separate and display content in sections.
- Control and manage recipients and send lists in an efficient way.

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

User Access:
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 the Dashboard Owner or a Superuser with Writer access to the Dashboard.

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 or Writer can view and subscribe to that Newsletter.

User Access:
Superusers who are Dashboard Owners or Writers and Superuser Admins can create Newsletter Subscription widgets.

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 the Dashboard Owner or a Superuser with Writer access to the Dashboard.

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

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

This feature is 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 users to set individual schedules for each alert.
- Category Subscriptions are based on selected taxonomy categories while the Personal Alert feature allows the user to also subscribe to more advanced filter searches including keyword filters and other filter combinations.
- Category Subscriptions do not allow Superuser Admins to subscribe others to a Category while Superuser Admins can subscribe others to Personal Alerts.

User Access:
Superusers and Superuser Admins who are Dashboard Owners and Writers can create Newsletter Subscription widgets.

User Access and Prerequisites

In this section you find information on who has access to what and the prerequisites for access.

All users can and have access to:

- Subscribe to Personal Alerts from **Search**.
  Prerequisites: Available by default in all portals.
- Subscribe to Personal Alerts from a **Dashboard**
  Prerequisites: The feature must be enabled on the General settings page in Admin and on the Post list widget of that Dashboard.
- Subscribe to Personal Alerts from an **Embedded Dashboard**
  Prerequisites: The feature must be enabled on the General settings page in Admin and on the Post list widget of that Dashboard. Your organization must also have user access to Wide Narrow via single sign on (SSO).

Contact your InfoDesk Account Manager, Customer Success or the InfoDesk Support team for more information about user access and SSO.

Superuser Admins can and have access to:

- The Alert Template page in Admin
  Prerequisites: Enabled for Admins on the General settings page in Admin.
- Subscribe Others to Alerts
  Prerequisites: Enabled for Admins on the General settings page in Admin.

Read more about what Superuser Admins can do under the **Alert Template** and **Subscribe Others** sections below.

Dashboard Owners and Writers can:

- Enable the Subscribe to Personal Alerts feature from the Dashboard Post list widget. Dashboard Owners and Writers must have Superuser access.

Activation

In this section you find instructions on how to activate the Personal Alert features.

Features activated by default

The following features are available and active by default in your portal:

- Subscribe to Personal Alerts from Search.
- Subscribe to Personal Alerts from Dashboard Post-list widgets when creating a **new** Post-list widget.
- Alert Template page in Admin. Includes a default Portal template.

Features requiring Activation

The following features require activation:

- Subscribe to Personal Alerts from an **existing legacy** Dashboard Post-list widget.
- Subscribe to Personal Alert from **Embedded Dashboard**. Requires SSO integration to Wide Narrow from your organization's intranet.
- Subscribe Others to Alerts.

Enable the Personal Alert feature in your portal

The Personal Alert feature is usually available by default when a new portal is created.

If the Alert feature is not activated by default it can be enabled on the General Settings page in Admin by InfoDesk System Administrators.

Contact your InfoDesk Account Manager, Customer Success or the InfoDesk Support team for more information on how to activate the feature.

Change and activate default Alert Templates in Admin

Only InfoDesk System Administrators can activate and deactivate the Alert Template page in Admin. When enabled Superuser Admins can change and custom Alert templates for the Personal Alert emails.

There are two kinds of Alert templates on the Alert template page in Admin, Global Alert templates and Portal Alert templates.

Global Alert Templates: A selection of Global Alert templates, created by InfoDesk System Administrators, are available by default in all portals. Only InfoDesk System Admins can create, activate and delete Global templates. Superuser Admins can duplicate Global alert templates and save them as Portal templates.

Portal Alert Templates: By default, all portals have one active Alert Template, with one of the Portal alert templates selected as the default.

As a Superuser Admin you can create and edit Portal templates and activate one of them as the default Portal template.

To change the default template to another template:

1. Navigate to the Alert template page in Admin.
2. Click the More button on the Portal template you want to activate as the default template and select "Use this template for Alerts".
   Or duplicate and save a Global template as the default template.
3. Click "Yes, continue" on the "Set this template as the alert template for all users?" notification.

Learn how to duplicate and create new templates in the **Alert Templates** section.

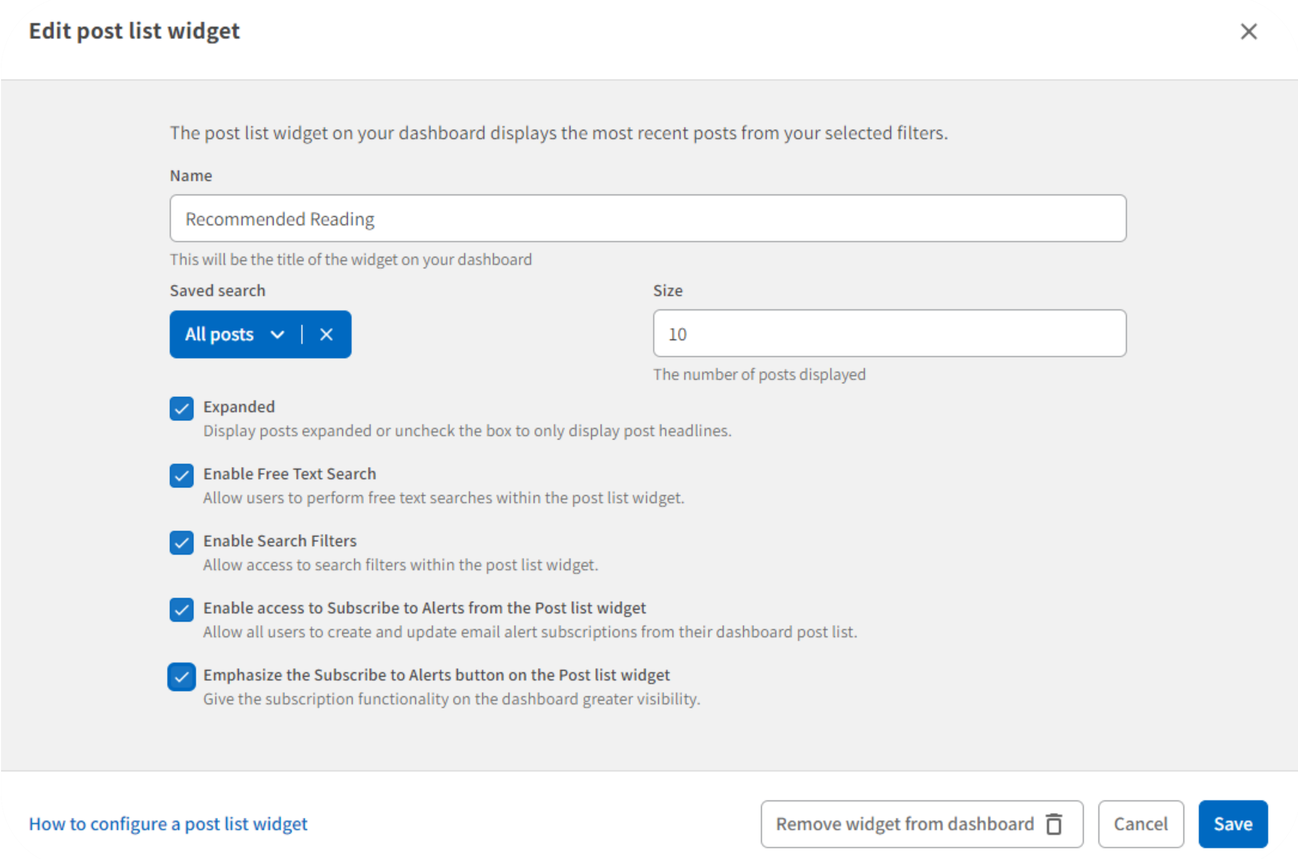
Enable Subscribe to Personal Alert from Dashboard

The possibility to subscribe to Personal Alerts from Dashboard Post-list widgets is enabled by default on all **new** Post-list widgets. Superuser Admins and Dashboard Owners can deactivate the feature on the Post list widget in the widget Edit mode.

The possibility to subscribe to Personal Alerts on **existing legacy** Dashboard Post-list widgets are not activated without the customer's consent. Superuser Admins and Dashboard Owners and Writers can enable the feature on the Post list widget in the widget Edit mode.

How to enable the Subscribe to Personal Alerts button

1. Navigate to the Dashboard.
2. Click the More button at the top right of the Dashboard and select Manage widgets.
3. Open the Post-list widget Edit mode and check the "**Enable Subscribe to Alerts from the Post-list widget**" checkbox.
4. We also recommend that you check the "**Enable Free Text Search**" and "**Enable Search Filters**" checkboxes to give the users access to the filter menu and key word filters when creating a search to subscribe to.
5. Check the "**Emphasize the Subscribe to Alerts button on the post list widget**" to give the Personal Alert feature greater visibility. The Subscribe button color will change from white to blue.



Enable Subscribe to Personal Alert from Embedded Dashboard

If you'd like to enable the Personal Alert feature on an embedded dashboard on your intranet your organization needs to have single sign-on (SSO) access to Wide Narrow.

The feature enables people in your organization to subscribe to Personal Alerts from an Embedded dashboard without username and password. An end-user account will be created automatically when someone subscribes to an Alert.

The SSO page in Admin provides instructions on how to set up a single sign-on connection to Wide Narrow.

An SSO integration typically requires involvement from the customer's IT department and must therefore be solved separately.

Contact your InfoDesk Account Manager, Customer Success or the InfoDesk Support team for more information on how to set up a single sign-on connection to Wide Narrow.

Enable Subscribe Others

The Subscribe Others feature is enabled on the General Settings page in Admin by an InfoDesk System Administrator. Contact your InfoDesk Account Manager, Customer Success or InfoDesk Support to enable the feature in Admin.

When enabled Superuser Admins and Dashboards Owners have access to the feature from the Subscribe drop-down in the Post list widget.

OUR RECOMMENDATION

We only recommend the **Subscribe Others** feature to be enabled and used when you are using InfoDesk Editor Services or when you are serving other users with their Personal Alerts. In all other cases, we recommend Automated Newsletters in the Newsletter module. Read more about Automated Newsletters in the **Alternative and supplementary features** section above.

Deactivation

The following features can be deactivated:

- Subscribe to Personal Alerts from Dashboard Post-list widget.
- Subscribe Others
- Access to Alert Template page for Superuser Admins.

The following features cannot be deactivated:

- Subscribe to Alerts from Search.
- Portal alert template – **one** alert template must always be active.
- Global alert templates – available by default in all portals.

Contact your InfoDesk Account Manager, Customer Success or the InfoDesk Support team for more information on how to deactivate the features.

Activation and deactivation Summary

Below is a summary of the Alert features, availability, and activation requirements.

FEATURE	NEEDS ACTIVATION	WHERE TO ACTIVATE	WHO CAN ACTIVATE
SUBSCRIBE TO PERSONAL ALERT FROM SEARCH	No Available by default Cannot be deactivated	n/a	n/a
SUBSCRIBE TO PERSONAL ALERT FROM DASHBOARD **EXISTING** POST-LIST WIDGET	Yes Can be deactivated	Dashboard Post-list Widget	Superuser Admins Dashboard Owners
SUBSCRIBE TO PERSONAL ALERT FROM DASHBOARD **NEW** POST-LIST WIDGET	No Available by default Can be deactivated.	Dashboard Post-list Widget	Superuser Admins Dashboard Owners
SUBSCRIBE TO PERSONAL ALERT FROM **EXISTING EMBEDDED** DASHBOARD	Yes. Requires SSO. Can be deactivated	Embedded Dashboard Post-list Widget	Superuser Admins Dashboard Owners
SUBSCRIBE TO PERSONAL ALERT FROM **NEW EMBEDDED** DASHBOARD	No but requires SSO. Can be deactivated	Embedded Dashboard Post-list Widget	Superuser Admins Dashboard Owners
SUBSCRIBE **OTHERS** TO ALERT	Yes Can be deactivated	General Settings in Admin	**System Admin** **Support**
ALERT TEMPLATES PAGE IN ADMIN	No Available by default Cannot be deactivated	General Settings in Admin	**System Admin** **Support**
GLOBAL ALERT TEMPLATES	No Available by default	Alert Templates page in Admin	**System Admin** **Support**
PORTAL ALERT TEMPLATES	Yes Can be deactivated but one template must always be active.	Alert Templates page in Admin	Superuser Admins

Alert Templates

When someone subscribes to a Personal Alert, they'll receive email alerts from your portal. The same goes when you subscribe others to alerts.

As a Superuser Admin you can create and manage the template used for the email Alerts on the Alert Template page in Admin.

You can duplicate and custom one of the Global templates from InfoDesk or use one of your portal's templates.

To create a new template without using any of the existing templates, click the "New Alert Template" button and build it up like a newsletter.

You can select only one default template for all email Alerts. To change the default template, create or select a new one and set it as default.

What Superusers Admins can do

Superuser Admins are allowed to:

- Preview existing Global and Portal templates.
- Create, edit, delete, and duplicate Portal templates.
- Duplicate Global templates and custom and save them as Portal templates.
- Add and edit all types of sections in the Portal template, including banner, table of content, headline, post list and footer.
- Choose one template as the default template for all alerts by selecting "Use this template for Alerts" and change the default template to another template.
- Specify the email subject for Combined Alerts.

As a Superuser Admin, you are not allowed to **delete** the currently selected Alert template. If you want to delete the template: Select another alert template as the default template for all Alerts and then delete the deactivated legacy template.

Global and Portal Templates

Global Templates

Global templates are templates created by InfoDesk and available in all portals for all customers.

Superuser Admins can duplicate a Global template and custom and save it as a Portal template. Global templates cannot be deleted.

Portal Templates

Portal templates are only available in the portal where they were created.

Superuser Admins can create, edit, duplicate and delete Portal templates.

Default Alert Template

By default, all portals have one active Alert Template, with one of the Portal alert templates selected as the default.

Superuser Admins can change the default template to another template.

Validation of Alert templates

The process of creating an Alert template is similar to creating a Newsletter template, with only minor differences. However, when trying to save an Alert template, validation has been added to ensure that the Alert template:

- has a name.
- has at least one section.
- has one post-list section.
- does not have more than one post-list section.

Recommended Sections and Layouts

Alert templates have the same section templates as Newsletters. However, when building an Alert template, we recommend that you use the sections differently.

All Alerts must include one post-list section, but all other sections are optional.

We strongly recommend ta always include a Banner section, a Post-list section (mandatory) and a Footer section.

You can select only one default template for all email Alerts, so to suit as many users and use cases as possible, consider the following when creating a new template:

Banner

Use a branded company banner or a generic image that suits any alert topic.

If you are unable to find a suitable image, you can opt for a solid color background and upload a transparent logo on top.

Table of Contents

A transparent or white background is usually best, especially if you have a colorful banner.

When using text colors, use dark grey instead of black and avoid light text colors on a light background.

You don't need to add any text in the text box as the text will be generated automatically. If you want to add a Table of Content headline, we recommend Headline 3 or Normal Bold.

Use the Table of Content layout that includes both headlines and posts if you want to display both the alert name and all included posts in the alert.

If you have multiple Alerts scheduled at the same time, we recommend that you choose to use the Table of Content layout that only includes headlines. The Table of Content of the Combined Alert will then consist of the titles of the included Alerts.

Post list layout

The Alert **template** must have one post-list section and not more than one.

When editing the layout of the post-list section, we recommend the following layout to fit as many as possible:

We recommend Headline 2 or 3 for the Post list Headline. When using text and background colors for the headline, use dark grey instead of black and avoid light text colors on a light background.

Select “With image” and “Post image position” to the right to get a nice layout.

Select “With description” and “with short description” to get the same length of all the articles in the alerts. Readers can click on the posts to read more.

Make sure that you have activated “with headline”. The post list headline will automatically generate the name of the Alert, named by the subscriber.

When a user subscribes to multiple alerts and schedules them at the same time, those alerts will be combined to a single alert. Each alert will be presented under its own post list section with the name of the saved search alert acting as the post list headline.

Select “with source name” to display the article sources on the posts.

Select “with date” to display the publication date of the included posts.

Avoid two columns, multiple images and categories in Alert templates.

Headline section

You don’t need to add a headline section to display the name of the alert in the alert template. The post list headline will automatically generate the name of the Alert, named by the subscriber.

You can use a headline section instead of a banner section to create banners with images and text beside or on top of the image.

Headline sections can also be used to add a common title for all alerts or to include a short introduction text to the Alerts. Note that all Alerts sent from the portal will have the same title and introduction text when added to the template.

Footer

Make it simple. Add a logotype and a generic text that fits all.

A transparent or white background is usually best, especially if you have a colorful logotype.

When using text colors, use dark grey instead of black and avoid light text colors on a light background. We recommend text size normal.

Manage Template Sections

There are five template sections available in the alert template: Banner, Table of Content, Headline, Post list and Footer.

You can easily manage your sections by adding, saving as a template, replacing, or deleting them. Simply click the **More** button on the section menu to view the options.

Use the blue **Add section** button to add new sections or click the More button on the section menu and choose if you want to add a section below or above the section.

When adding and customizing a template section that you want to be able to reuse, you can **save the section as a template**. The section will be available as a section template when opening the template section overview page.

You can replace a template section and select another saved template of the same section. Click **Replace section** and select another template.

To **delete a section** from your alert template, follow these steps:

1. If the section is a saved template, removing it from the alert template will not delete it from the section templates. You will still be able to access it as a template in the future.
2. If the section is not a saved template, deleting it from the alert template will permanently erase it and it will no longer be available in the section templates.

Make sure to double-check whether the section you want to delete is saved as a template or not before removing it from your alert template.

How to create a Portal Alert Template

Preparations

Before you start customizing your Alert template in Admin, we recommend that you have your organizations brand guidelines and resources available, including:

- Banner image
- Logotype
- Preferred font
- Brand color codes

Duplicate and custom an existing Template

The quickest way to create a new template for your alerts is to duplicate and customize one of the existing Global or Portal templates. Custom it with a new banner, logotype and other layout details and then save it as the default template for all Alerts.

You have the option to edit, replace and delete sections from the copied template.

All Alerts must include one post-list section, but all other sections are optional.

We strongly recommend ta always include a Banner section, a Post-list section (mandatory) and a Footer section.

1. Navigate to the Alert Template page in Admin.
2. Preview the available templates by clicking the More button and then Preview on the Global and Portal template cards.
3. To create your own template from one of the existing templates, simply click the More button on the template card, and select Duplicate. The copied template will now appear as a new template under Portal templates with the same name and a number (1, 2 ...) in parentheses.
4. On the copied template card: Click the More button and then Edit to open the edit form.

5. Click the **palette icon** to style the template. Select or custom fonts, font size and the background color of the newsletter. If you don't make any changes, the default settings will be used. The default background color is light grey, and the default font is Helvetica.

6. **Banner section:** Use it as it is or hover over the Banner section to display the banner menu and select Edit to open the Edit banner form. To custom the banner and logotype:

    a. Click the cross to delete the default banner image and logotype.

    b. Click on the banner image area to upload your own banner image or click Find image to select an image from the Image Library.
    Select the height of the image banner by using the options in the Height drop-down.

       Alternatively, select a background color to cover the banner area instead of an image. Select one of the default colors or select custom and then enter a color code to custom the color.

    c. Click on the logo image area to upload your logotype. Position the logotype on the image by clicking the position buttons below the logotype area.

    d. Preview the result and click Save when you are satisfied with the layout.

7. If a Table of Content section exists: Use it as it is or hover over the **Table of Content section** and select Edit to customize the Table of Content section:

    a. Toggle the buttons change the settings. To include only headlines or only post or both headlines and posts in the TOC. Use the Table of Content layout that includes both headlines and posts if you want to display both the alert name and all included posts in the alert.

    b. Click Background color to change the background color. A transparent or white background is usually best, especially if you have a colorful banner.

    c. Click Text color to change the text color. When using text colors, use dark grey instead of black and avoid light text colors on a light background.

   d. You don't need to add any text in the text box as the text will be generated automatically but you can change the text style by using the available design elements. We recommend Headline 3 or Normal Bold.

   e. Preview the result and click Save when you are satisfied with the layout.

   If a Table of Content section does not exist: Optionally, click the blue Add section button to add a **TOC** section and follow the steps above.

8. If a **Headline section** exists: Use it as it is or hover over the Headline section and select Edit to customize it:

   a. Click the cross to delete any default image. Upload and position a new image.

   b. Change the text and text style in the text box to rename the Alert name or change the introduction text.

      Note that the text and images will be used in all Alerts sent from the portal if you set this template as the default template.

   c. To change or add a dynamic date visible in all Alerts, click the date icon and custom the date style. Read more about dynamic dates in Help.

   d. Click Background color to change the background color of your headline.

   e. Click Text color to change the text color of the headline section.

   f. Preview the result and click Save when you are satisfied with the layout.

   If a Headline section does not exist: Optionally, click the blue Add section button to add a **Headline** section and follow the steps above.

9. **Post list section:** Use it as it is or hover over the Post-list section and select Edit post-list to open the Edit post list form:

   a. Toggle the buttons to customize how posts are displayed in the post list. Always use "With headline" to separate the alerts with the alert names as headlines in combined alerts.

      Read more tips in the **Recommended Sections and Layouts** section above.

   b. The text in the textbox will be replaced by the Alert name when sent. Use the available design elements to control its styling. We recommend Headline 2 or 3 for the Post list Headline.

   c. Click the Text color and Background color to customize the headline text and background color. When using text and background colors for the headline, use dark grey instead of black and avoid light text colors on a light background.

   d. Add a separator to separate the headline from the post list.

   e. Preview the result and click Save when you are satisfied with the layout.

10. **Footer section:** Use it as it is or hover over the **Footer section** to display the footer menu. Select Edit to open the Edit footer form:

    a. Click the cross to delete the default logotype. Then click on the logo image area to upload your logotype. Position the logotype on the image by clicking the position buttons below the logotype area.

    b. Select a background color to cover the banner section behind the logotype. Select one of the default colors or select custom and then enter a color code to custom the color. A transparent or white background is usually best, especially if you have a colorful logotype.

    c. Add a generic text that fits all. When using text colors, use dark grey instead of black and avoid light text colors on a light background. We recommend text size normal.

    d. Preview the result and click Save when you are satisfied with the layout.

11. Click the **Save** button. On the new alert template pop-up:

    a. Enter the name of the Alert in the name field.

    b. Specify an email subject for **Combined Alerts** or leave blank to use the portal name. The email subject will be used for all Combined alerts sent from the portal. Note that single Alerts containing only one saved search will use the Alert name as the email subject.

c. Mark the “Use this template for alerts” checkbox to use this template as the default template for all Alerts from your portal. Leave unchecked if you want to use another template as the default template.

d. Click Save.

Create a brand new Template

You can easily create a brand new template without using any of the available Global or Portal templates. Custom the alert template with banner, logotype and other layout details and then save it as the default template for all Alerts.

All Alerts must include one post-list section, but all other sections are optional.
We strongly recommend ta always include a Banner section, a Post-list section (mandatory) and a Footer section.

1. Navigate to the Alert Template page in Admin.
2. Click the New Alert template button on top of the page.
3. Click the palette icon to style the template. Select fonts, font size and the background color of the newsletter. If you don’t make any changes, the default settings will be used. The default background color is light grey, and the default font is Helvetica.
4. Start building the template by adding a **Banner section**.

    e. Click the Add button to choose one of the banners in the banner template selection.

    f. Hover over the banner section to display the banner menu and select Edit to open the Edit banner form.

    g. Click the cross to delete the default banner image and logotype.

    h. Click on the main banner image area to upload your own banner image or click Find image to select an image from the Image Library.
    Select the height of the image banner by using the options in the Height drop-down.
    Alternatively, select a background color to cover the banner area instead of an image. Select one of the default colors or select custom and then enter a color code to custom the color.

i. Click on the logo image area to upload a logotype. Position the logotype on the image by clicking the position buttons below the logotype area.

j. Preview the result and click Save when you are satisfied with the layout.

TIPS! You can use a headline section as a banner if you want to add text on your image instead of using a logotype.

5. Click the blue Add section button to add a **Post list** section.

    a. Toggle the buttons to customize how posts are displayed in the post list. Make sure to make a clean and simple post list layout that suit all alerts sent from the portal. Always use "With headline" to separate the alerts with the alert names as headlines in combined alerts.

    Read more tips in the **Recommended Sections and Layouts** section above.

    b. The text in the textbox will be replaced by the Alert name when sent. Use the available design elements to control its styling. We recommend Headline 2 or 3 for the Post list Headline.

    c. Click the Text color and Background color to customize the headline text and background color. When using text and background colors for the headline, use dark grey instead of black and avoid light text colors on a light background.

    d. Add a separator to separate the headline from the post list.

    e. Preview the result and click Save when you are satisfied with the layout.

6. Click the blue Add section button to add a **Footer** section.

    a. Click the cross to delete the default logotype. Then click on the logo image area to upload your logotype. Position the logotype on the image by clicking the position buttons below the logotype area.

    b. Select a background color to cover the banner section behind the logotype. Select one of the default colors or select custom and then enter a color code to custom the color. A transparent or white background is usually best, especially if you have a colorful logotype.

    c. Add a generic text that fits all. When using text colors, use dark grey instead of black and avoid light text colors on a light background. We recommend text size normal.

d. Preview the result and click Save when you are satisfied with the layout.

7. Optionally, click the blue Add section button to add a **Table of Content** section.

   a. Toggle the buttons to include only headlines or only post or both headlines and posts in the TOC. Use the Table of Content layout that includes both headlines and posts if you want to display both the alert name and all included posts in the alert.

   b. Click Background color to custom the background color. A transparent or white background is usually best, especially if you have a colorful banner.

   c. Click Text color to custom the text color. When using text colors, use dark grey instead of black and avoid light text colors on a light background.

   d. You don't need to add any text in the text box as it will be generated automatically, but you can style the text by using the available design elements. We recommend Headline 3 or Normal Bold.

   e. Preview the result and click Save when you are satisfied with the layout.

8. Optionally, click the blue Add section button to add a **Headline** section.

   You don't need to add a headline section to display the name of the alert in the alert template. The post list headline will automatically generate the name of the Alert, named by the subscriber.

   a. You can use a headline section instead of a banner section to create banners with images and generic text beside or on top of the image. Upload and position an image. Write and style the text in the text box.

      Note that the text and images will be used in all Alerts sent from the portal if you set this template as the default template.

   b. Headlines can also be used to include a short introduction text to the Alerts. Use the text box and style elements to add an introduction.

      Note that all Alerts sent from the portal will have the same introduction text if you set this template as the default template.

   c. To add a dynamic date visible in all Alerts, click the date icon and custom the date style. Read more about dynamic dates in Help.

   d. Click Background color to custom the background color of your headline.

   e. Click Text color to customize the text color of the headline section.
   f. Preview the result and click Save when you are satisfied with the layout.

9. Click the **Save** button. On the new alert template pop-up:
   a. Enter the name of the Alert in the name field.
   b. Specify an email subject for **Combined Alerts** or leave blank to use the portal name. The email subject will be used for all Combined alerts sent from the portal. Note that single Alerts containing only one saved search will use the Alert name as the email subject.
   c. Mark the “Use this template for alerts” checkbox to use this template as the default template for all Alerts from your portal. Leave unchecked if you want to use another template as the default template.
   d. Click Save.

Subscribe to Personal Alerts

All users can subscribe to Personal Alerts 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 Aert. 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.

Manage Personal Alerts

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.

The schedule can be changed on the Subscription page.

Change Personal Alert schedule

You can easily change the schedule of your Personal Alerts on the Subscription page.

1. In Search and on Dashboards: Click the down arrow beside the Subscribed button and select Manage Subscriptions to be directed to the subscriptions page.

   OR navigate directly to the Subscription page.
2. On the Subscriptions page, click the name of the Personal Alert to open the Alert schedule.
3. Change the schedule and Save.

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.

4. Navigate to Search
5. Open the saved search drop-down and click on the saved search you want to unsubscribe from.
6. 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 or Manage Subscriptions 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.

Subscribe Others to Alerts

Introduction

As a Superuser Admin, you can subscribe other users to an Alert. The feature aims to assist Superuser Admins when they get requests to subscribe other users to alerts.

The **Subscribe others** feature is available in Search and Dashboards and allows you to:

- Subscribe multiple users to alerts.
- Add or remove users from existing alerts.
- View and manage other users' subscriptions on the User page in Admin.
- Update the alert schedule.

When subscribing other users, you can choose to subscribe to:

- A selected shared saved search
- An existing shared saved search identical to the current search criteria
- A new shared saved search

Subscribe Others Use Cases

This feature makes it easy for you to assist end-users when they reach out to you with a request for information. When they ask for information, you can create a saved search matching their request and subscribe them to the saved search.

As a Superuser Admin, you may also want to get an overview of your end users' subscriptions to assist them in managing them.

How to Subscribe Others

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

6. Navigate to Search.
7. 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.
8. Click the Subscribe button on the right above the Post list and select the Subscribe Others option in the Subscribe drop-down.
9. Name the subscription. This name will be the email subject of the alert and the name displayed on the Unsubscribe page and Subscription page in Wide Narrow.
10. Schedule the alert.
11. Click the Subscribers tab on top of the form.
12. Search and add one or multiple users to the alert and click Save.

GOOD TO KNOW

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

How to manage Alert Subscriptions for others

Add or remove users from existing Alerts

You can add or remove users from existing alerts on the Search page.

1. Navigate to Search and select the saved search your Alert is based on.
2. Click the arrow beside the Subscribe button and select the Subscribe Others option.
3. Click the Subscribers tab and add or remove users from the Alert. Click Save.

View and manage users' subscriptions on the User page in Admin.

You can view and manage users' subscriptions on the User page in Admin.

1. Navigate to the Users page in Admin.
2. Search for a user and click the More button in the Edit column on the user row and select the Alert Subscriptions option.
3. You can now view all the users' subscriptions and remove the user from any of the subscriptions.

Update the alert schedule

You can easily update the alert schedule on the Search page.

1. Navigate to Search and select the saved search your Alert is based on.
2. Click the arrow beside the Subscribe button and select the Subscribe Others option.
3. Update the alert schedule and click Save.

Combined Alerts

If a user subscribes to multiple 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 saved search acting as the header.

The above is also applicable if you as a Superuser Admin subscribe **others** to an alert.

TIPS!

- If you want the receivers to receive multiple alerts in separate emails, set different time schedules for each alert when subscribing them.

Email Subject

The email subject is the first thing recipients see after the sender's name when receiving the Alert. It should help recipients recognize the alert and briefly describe the content or purpose of the email. If you set up alerts for others, you probably also want the subject line to grab people's attention and encourage them to open and read the alert.

The email subject for Alerts works as follows:

- Alerts containing only **one** alert (saved search) will always have the **alert name** as the email subject.

- Combined alerts containing **multiple** alerts (saved searches) may have the **portal name** or a **specified** default name as the email subject:

    If the current Portal Alert Template does not have a specified email subject, the **portal name** will be used as the email subject.

    If the current Portal Alert Template has a specified email subject, that **specified name** will be used as the email subject for all combined alerts.