



Free Training Transcript: Data Driven Alerts

Welcome to this video for Data Driven Alerts. You must have access to Tableau Server to use alerts. If you have publishing rights, you can download and republish the Exercise workbook to follow along in your own copy of Tableau.

Tableau Server can email you an alert if your data crosses a specified threshold. Alerts are a great way to stay on top of your changing data.

Setting up an alert on a published workbook

To create an alert, open a published workbook and select the numeric axis for the chart you want the alert for. Here, for example, I want to be alerted if a stock price exceeds \$850, so I'll select the axis for Average Close.

With the axis selected, click the Alert button. A dialog will pop up allowing us to configure the alert: We can set the condition (above or equal to, below, etc.), I'll select Above. And set the threshold value itself, I'll enter 850. The pink line is temporary, to help us see where the threshold falls in the current viz—it won't be added to the view. I can see the condition is currently met, which I'm ok with. We can also set the subject line of the email, I'll say "Sell Stocks!" There's also the ability to determine how many times to get the alert—for example, I only want to get an alert at most once a week. And finally, we can set another recipient (if they're a member of the site with an email address available).

Refining the alert

To create an alert on a subset of the data, such as just a single stock ticker, we need to have an axis that's specific to that subset. Here, it looks like I have an axis per company—but really, it's the same measure, and if I try to set an alert, I can see it applies to all three companies. However, if I click on Tesla and keep only that company, the axis is now tied only to the piece of data we want the alert on.

But alerts can only be made on saved views. What does that mean? To make this a persistent view that can have an alert, we can save the view here where it says the view is the original. Once we've saved the view and have selected the axis, we can click the Alert button and proceed as before.

Managing alerts

If we want to manage our alerts, we can do so by clicking on our name in the upper right

and selecting “My Content”. Here, we can see a new tab for Alerts. We’ll see a list of all the alerts we receive or own, with links to their respective views. If we open the ellipse menu, we can delete it, modify who receives it, and edit it just like we did when setting it up.

Stacked bars

When building alerts around stacked bar charts, there’s one thing to keep in mind. Here, it looks like the profit for Furniture goes all the way to \$350k, so it would pass an alert threshold of 325 thousand. But really, the view stacks the profits for each sub-category—so the negative profit for tables needs to be subtracted. Tableau will create the alert based on the TOTAL on the axis. Here, the view has bars to show the total as Tableau sees it for each category. These values are what the threshold will be compared against. As long as we keep that in mind, we can build data driven alerts off stacked bar charts just like anything else.

Building views for alerting

If you’re a publisher who creates views for others to use, there some tips that can make your vizzes more useful for those setting alerts on them.

1. Only some view types work for alerts. No Gantt bars or Maps.
2. Make sure your axes are showing. Sometimes we hide headers and axes when they’re not necessary, but they need to be present for alerts
3. If you usually turn off the command buttons in tooltips, remember that if someone wants to set an alert on just a subsection of the data, they’ll need to create that view for themselves, and command buttons to keep only or exclude can be very helpful there.

Alternatively, build your views such that each piece that someone may want to have an alert on has its own axis.

Conclusion

Thank you for watching this training video on alerts. We invite you to continue with the Free Training videos to learn more about using Tableau.