

Subscribe to dashboard

The Subscribe to dashboard feature lets users set recurring subscriptions to specific dashboards, providing updated information directly to their email inbox or the email inbox of their colleagues. Subscriptions will email dashboard information to specific recipients for a relative date range at a set time.

Note: The Subscribe to dashboard feature uses the “From” email address noreply@notifications.saberanalytics.com. Your health center’s IT department should whitelist this email address to ensure that users can receive emails from dashboard subscriptions.

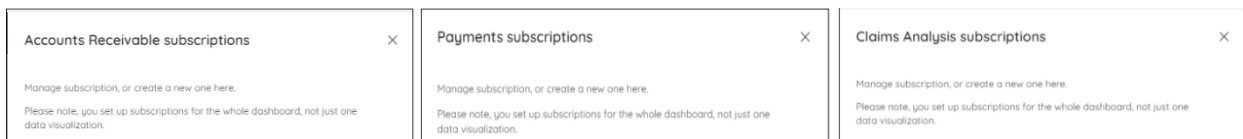


Users can also maintain their dashboard subscriptions in **My subscriptions**. Refer to [My subscriptions](#) for more information.

Use the **Search by** text box to search for and locate existing subscriptions. Refer to [Search](#) for more details.

Steps to subscribe:

1. Navigate to a Financial Insights **dashboard**.
2. From the toolbar, click **Subscribe to dashboard**.
3. This opens the **Subscriptions** panel for the dashboard.

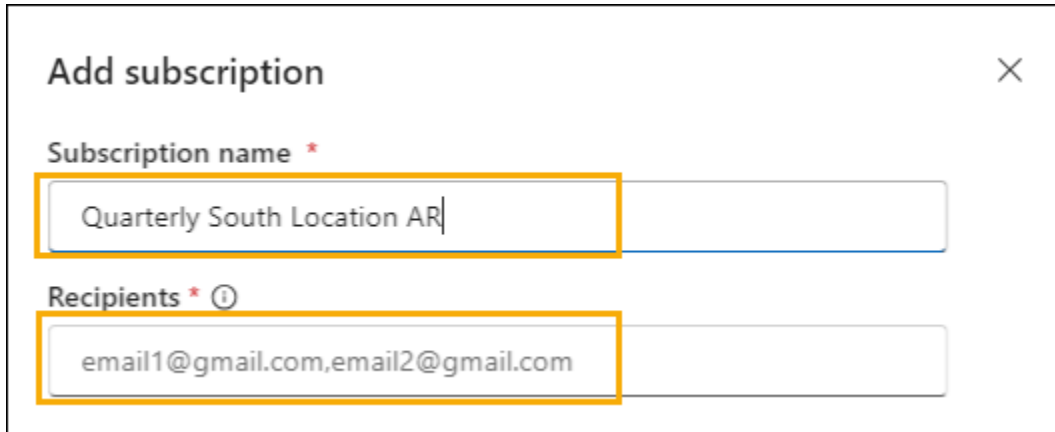


4. Click **+Add new subscription**.
5. This opens the **Add subscription** panel.
6. Enter the **Subscription name** (Required).

Note: A warning message will appear if a user attempts to use a subscription name that already exists for the user.

7. Enter the **Recipients** email address(es) (Required).

Note: If entering more than one email address, separate the email addresses with a comma.



Add subscription ×

Subscription name *

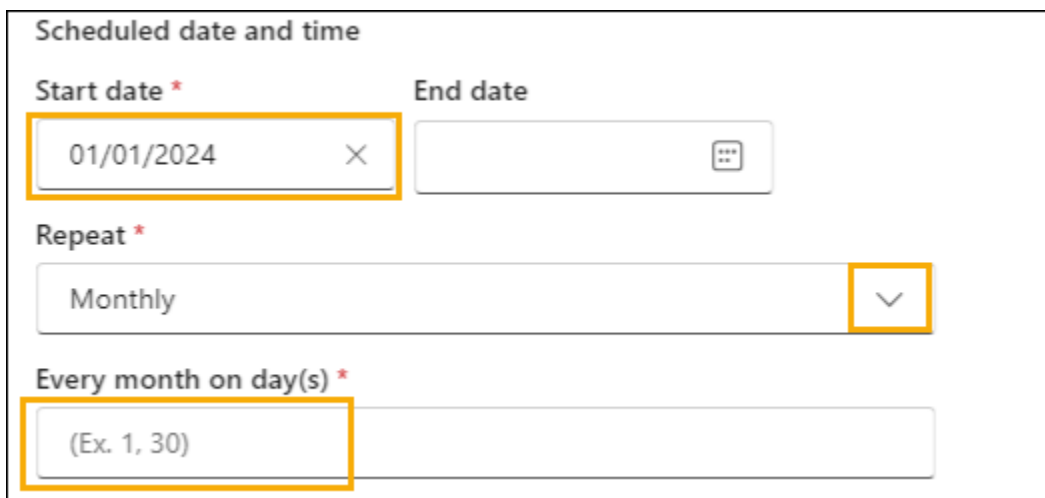
Quarterly South Location AR

Recipients * ⓘ

email1@gmail.com,email2@gmail.com

8. Enter the **Start date** (Required) and **End date** (Optional).
9. Use the **drop-down menu** to select the **Repeat** frequency (Required).
 - Hourly
 - Daily
 - Weekly
 - Monthly

Note: Hourly, Weekly, and Monthly options open additional options to specify the days.



Scheduled date and time

Start date * **End date**

01/01/2024 × ⋮

Repeat *

Monthly ▾

Every month on day(s) *

(Ex. 1, 30)

10. Use the **drop-down menu** to select the **Send time** (Required).
11. Use the **drop-down menu** to select the **Time zone** (Required).

12. Use the **drop-down menu** to select the **Date range for dashboard** (Required).
13. Click the **More options** link to enter an **Email subject** line and email **Message** (Optional).
14. Click **Save**.

Send time *

7:00 AM ▼

Time zone *

(CST) - Central Standard Time ▼

Date range for dashboard *

Quarter-to-Date ▼

▼ **More options**

Email subject

Message

Save

15. This returns you to the Subscriptions panel. Click the **X** to close the panel.

Deactivated Subscriptions

Turn off the **Active** toggle to view the deactivated subscriptions.

Show 10 entries

Active

Subscription name ⓘ ↑

Status ⓘ