Slack Integration

- Send Slack Notifications
- Send a Notification Ad Hoc
- SCHEDULE A SLACK NOTIFICATION
- Condition Options
- Related articles

Send Slack Notifications

If Slack notifications are enabled for your organization, workbooks, their pages, and individual elements can be sent to any channel in your Slack account on a set schedule or as-needed basis. This is helpful for presenting your data beyond Sigma.

Exporting to Slack automatically sends your team exactly what they want, when they want it, in a place they'll see it.

Each workbook can support multiple schedules, and each export can support multiple attachments.

Exports are always generated from the latest published version of the workbook. Unpublished changes (drafts) are not applied. Slack exports capture data that's accessible to the export creator / Owner.

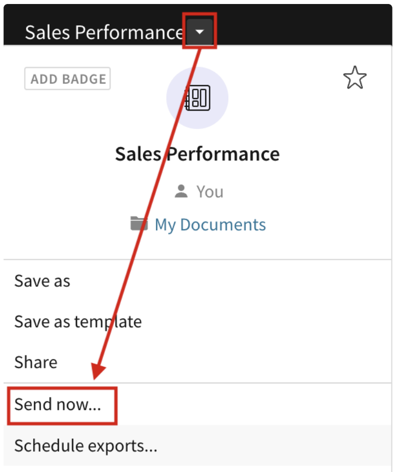
Below is how to send and schedule exports to Slack.

- Only Sigma Creators and Admins can send and schedule Slack notifications.
- The **Sigma Notifications** Slack app must be added to any channels, public or private, that you want to be able to send notifications to. Send a message to **@Sigma Notifications** within a channel to add it to that channel
- If you plan to send the notification to a private channel, Sigma's Notifications bot must first be enabled for that channel. Type **@Sigma Notifications** into your private channel to enable it.
- When a Sigma user sends or schedules a notification, they have the option to choose whether the notification includes a link to the worksheet or dashboard in Sigma.
- Anyone viewing the notification in Slack must have a Sigma account with access granted on the report to view it live in Sigma.

Send a Notification Ad Hoc

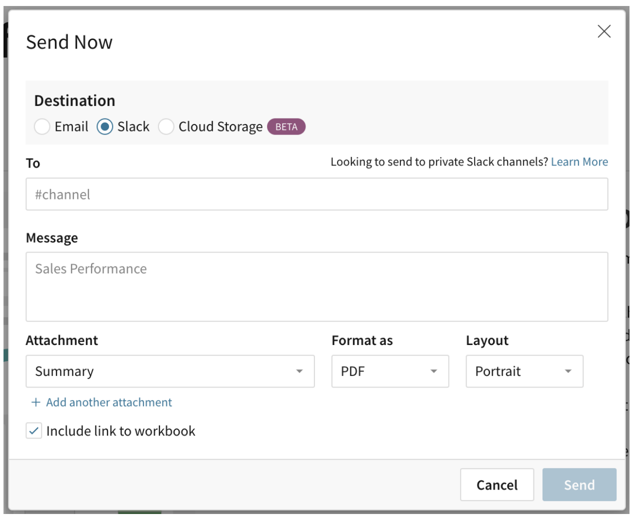
To send an export to Slack without creating a schedule:

1. Click the caret (▼) button in the workbook header.
2. Select **Send now**.
   Note: This option is only available from a workbook's latest published version. If the menu item is disabled you are in Edit mode. Either publish your draft or return to the latest published version of the workbook before attempting to send an email.



This opens the **Send Now** model.

3. Under **Destination** select **Slack.**



4. In the **To** field, enter the name of your target Slack channel (e.g. #top-secret-channel).
   Note: If you plan to send the notification to a private channel, Sigma's Notifications bot must first be enabled for that channel. Type **@Sigma Notifications** into your private channel to enable it.
5. [optional] Enter a message in the **Message** field.
   Tip: You can use Slack channel @ mentions (e.g. @here or @channel) to notify target recipients when the notification is delivered. This is not supported for individual recipients (e.g. @rob or @marketing-team).
6. Select your attachment(s). To do this:
   a. Open the **Attachment** dropdown menu**.**
      - To attach the entire workbook, select **Entire workbook**.
      - To attach an individual page, select the page > **Entire page**.
      - To attach an individual element, select the page > the element.

   b. In the **Format as** dropdown, select a file format.
      - If the attachment is the entire workbook, your only format option is **PDF**.
      - If the attachment is an individual page, select either **PDF** or **Image**.
      - If the attachment is an individual element, select from: **PDF**, **CSV**, **Excel**, or **Image**.
        Important: CSV and Excel attachments export as raw data.

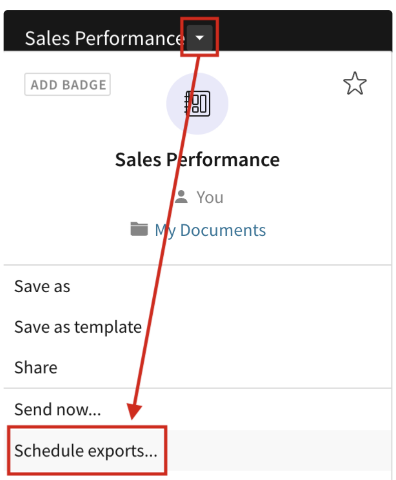
c. If you selected **Format as** > **PDF**, select a PDF layout in the **Layout** field: **Portrait** or **Landscape**.

7. [optional] To add additional attachments, click **+ Add another attachment**. Then repeat step 7 of these instructions.
   Each attachment will arrive in Slack as an independent message.
8. [optional] To include a link to the workbook in the message body, check **Include workbook link**.
   Note: Exports to Slack capture data that's accessible to the export creator. However, if a user clicks the workbook link, Sigma only displays what that individual user has permission to view.
9. Click **Send**.

SCHEDULE A SLACK NOTIFICATION

1. **Important**: Emailed exports are generated from the workbook's latest published version. Drafted changes are not applied until published.

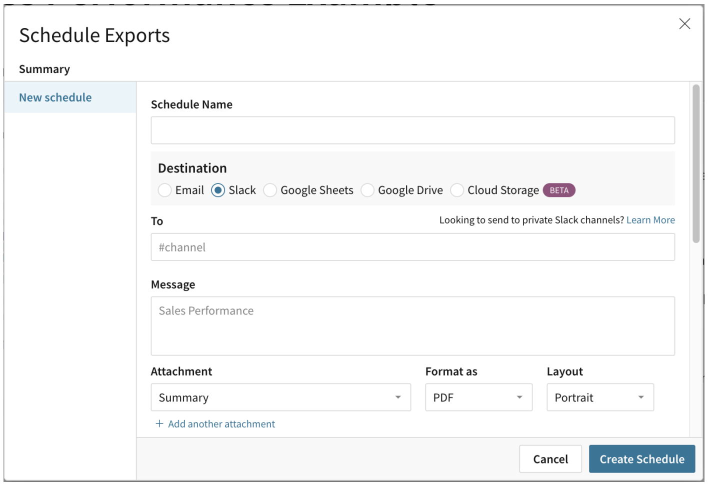
   To schedule an export to Slack notification:
2. Click the caret (▼) button next to the workbook title.
   a. Select **Schedule exports**.

   This opens the **Schedule Exports** model.

   b. If this is the workbook's first schedule, click **Add Schedule**.
   If one or more schedules already exist, click **+ New schedule.**
   This opens a **New schedule**.

c. Under **Destination,** select **Slack**.



d. In the **To** field, enter the name of your target Slack channel (e.g. #my-team).

Note: If you plan to send the notification to a private channel, Sigma's Notifications bot must first be enabled for that channel. Type **@Sigma Notifications** into your private channel to enable it.

e. [optional] Enter a message in the **Message** field.

Tip: You can use Slack channel @ mentions (e.g. @here or @channel) to notify target recipients when the notification is delivered. This is not supported for individual recipients (e.g. @rob or @marketing-team).

f. Select your attachment(s). To do this:

i. Open the **Attachment** dropdown menu**.**

- To attach the entire workbook, select **Entire workbook**.
- To attach an individual page, select the page > **Entire page**.
- To attach an individual element, select the page > the element.

ii. In the **Format as** field, select a file format.

- If the attachment is the entire workbook, your only format option is **PDF**.
- If the attachment is an individual page, select either **PDF** or **Image**.
- If the attachment is an individual element, select from: **PDF**, **CSV**, **Excel**, or **Image**.

  Important: CSV and Excel attachments export as raw data.

iii. If you selected **Format as** > **PDF**, select a PDF layout from the **Layout** dropdown: **Portrait** or **Landscape**.

g. [optional] To add additional attachments, click **+ Add another attachment**. Then repeat step 7 of these instructions.

Each attachment will arrive in Slack as an independent message.

h. [optional] To include a link to the workbook in the message body, check **Include workbook link**.

Note: Exports to Slack capture data that's accessible to the export creator. However, if a user clicks the workbook link, Sigma only displays what that individual user has permission to view.

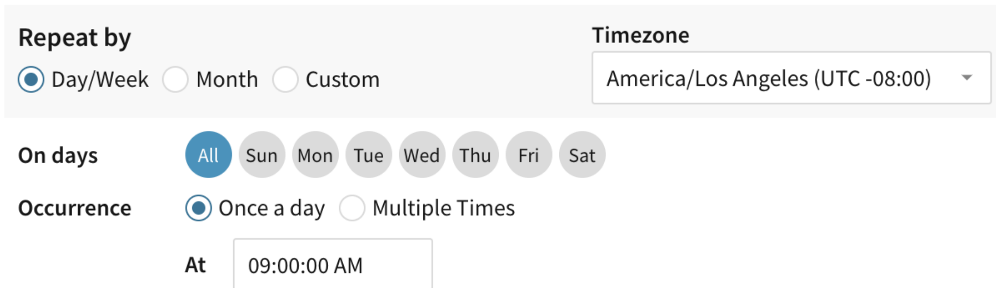
i. Select your delivery schedule. To do this:

i. In the **Repeat by** field, select a schedule option: **Day/Week**, **Month** or **Custom**.

ii. In the **Timezone** field, select a timezone.

iii. Setting a schedule frequency depends on the **Repeat by** option you selected above.

- If you selected **Day/Week**, pick the schedule's day(s) of the week (**On days**), the Occurrence and time (**At**).
- If you selected **Month**, select the **Day of month** (1-31) and time (**At**).
- If you selected **Custom**, enter a raw cron string value.

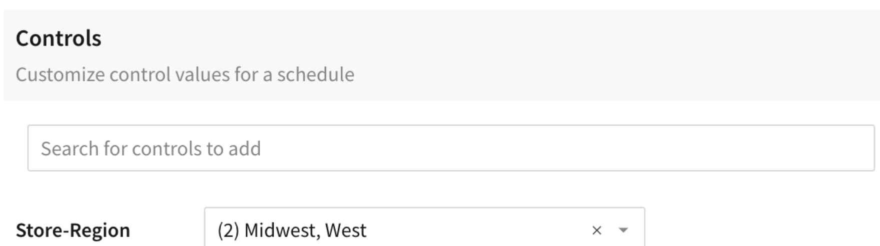


j. [optional] Select one or more workbook controls to apply to the exported content.

i. In the search box below **Controls**, search for and select the control by control-id.

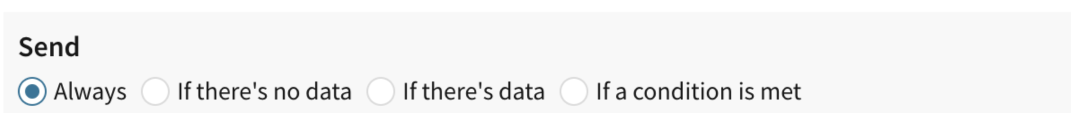
ii. Select the control value(s) to apply to to scheduled export.

iii. Repeat this step to add additional controls.



k. [optional] Select your preferred send conditions.

i. Under **Send**, select **Always**, **If there's no data**, **If there's data**, **If a condition is met**.



ii. Send condition details vary by send selection.

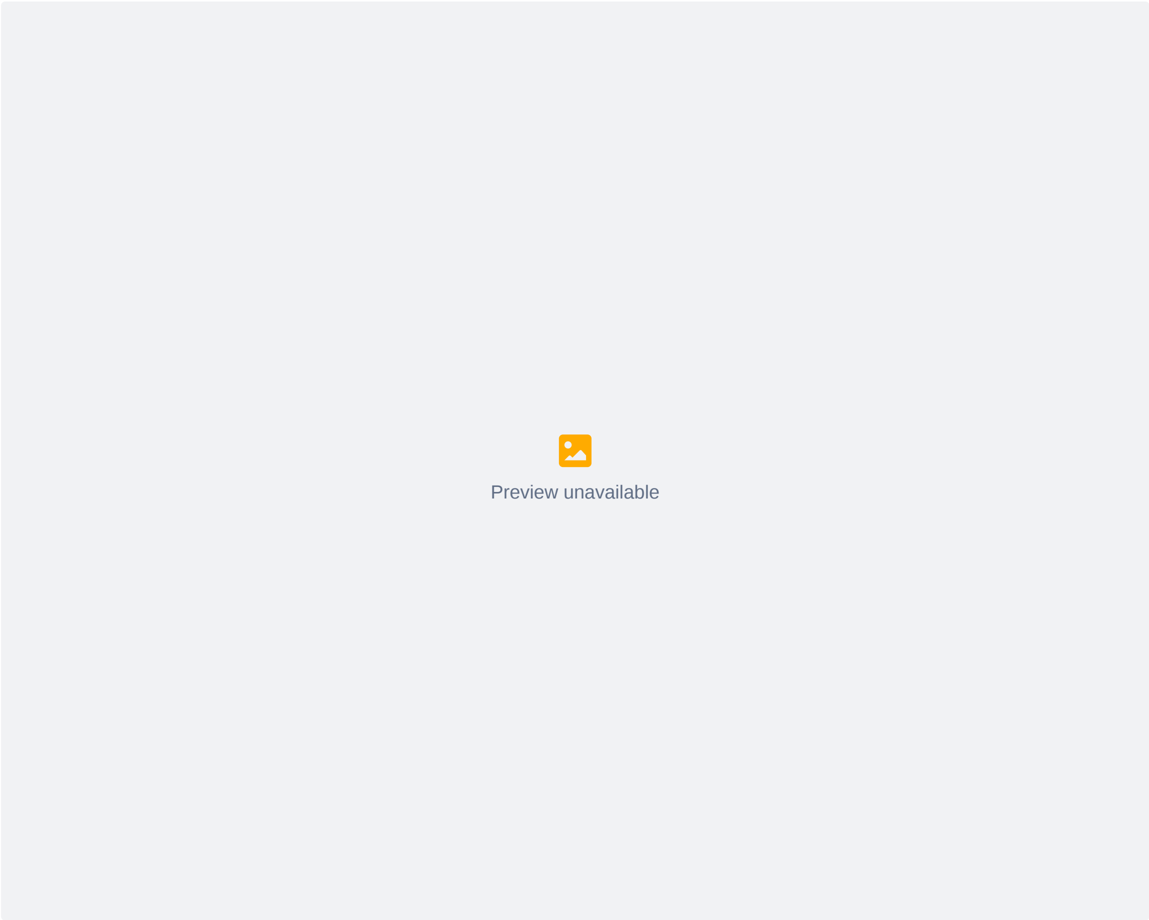
- If you selected **Always**, you're all set. Continue to the next step.
- If you selected **If there's no data**, select a determining element under **In data element**.
- If you selected **If there's data**, select a determining element under **In data element**.
- If you selected **If a condition is met**, select a determining element under I**n data element**.
  Then select your fill in the blank options under **Check If**, **In Column**, and **Is**. Depending on your selection under **Is**, you may also need to provide a **Value**.

iii. [optional] Click **Test Condition** to confirm if data in the workbook meets your selected condition. Test results appear in line with the button.

l. Click **Create Schedule**

Condition Options

Available options may vary depending on the workbook and its available data. These options can be set in the scheduler modal, under **Send.**



Any of the following options can be selected:

- **Always** - Always send at the scheduled time.
- **If there is no data** - Send IF a selected element has no data.
- **If there is data** - Send IF a selected element has data.
- **If a condition is met** - Send IF a specific column in a selected element meets a specific condition.
  If this option is selected, you will be prompted to define column-specific condition using all or some of the following fields:
  a. **Check if** - Choose whether **Any values** or **All Values** should meet the condition that follows.
  b. **In column** - Select one column from the list for the condition to run against.
  c. **Is** - Select a condition (e.g. *equal to*, *greater than*, *contains*) to check against the column's values. Options are dependent on the selected column's value type.
  d. **Value** - [only available if the condition accepts a value] Input a value to check against the condition. The input value must match the selected column's value type.

Related articles

- Heroku Environments and Access
- Slack Integration
- Sign-in Instructions