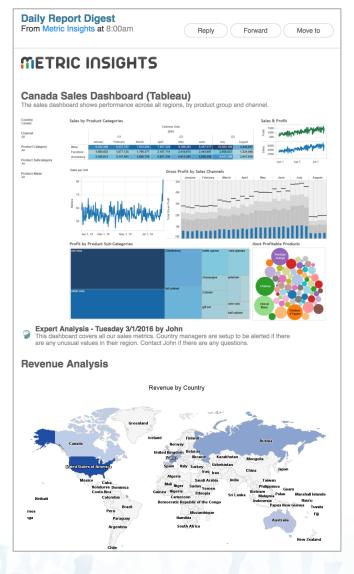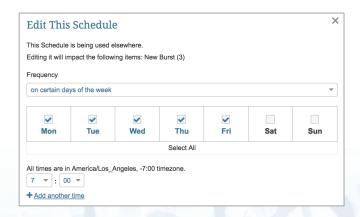# METRIC INSIGHTS
PLAYBOOK | BURSTING

Play Overview

A Burst is content collected from multiple systems or sources and delivered to an audience on a schedule. Images can be combined from multiple dashboards or systems into a single email that will allow the user to quickly scan all of their most relevant Business Intelligence content directly via. Email (no need to login to BI applications).

Success Criteria

1. Busting is most effective if the audience does not regularly login to view the content.

2. All content in a Burst should be relevant to every subscriber to the Burst. It is better to have a larger number of highly targeted Bursts, than to have a Bursts sent to individuals who only care about some of the included content.

3. Customize dimension and filter values on Burst content so that each user is receiving reports and dashboards that are pre-filtered to her specific focus area. This can be accomplished through user-maps, Trusted Server Authentication, or dimension access.

4. Set Burst content and settings so that only newly updated content is included (avoid bursting stale reports).

5. Consider the audience when selecting or designing the email template for the Burst.

6. Carefully evaluate the value generated by each item that is included in the Burst to ensure that it is likely to engage the user on each Burst distribution.

7. Schedule Burst frequency and timing in a way that will satisfy data dependencies and maximize value to the audience.

Additional Information

Creating Bursts - http://help.metricinsights.com/m/Pushing_Information_to_Users/l/791880-create-new-burst-version-5-1-2-and-beyond

Creating Schedules – http://help.metricinsights.com/m/Jump_Start_Guide_for__Regular_Users/l/421341-creating-a-new-schedule-via-burst-editor

REQUIREMENTS FOR THE PLAY
Fill in the bolded fields

BURST CONTENT

1. Elements to include in the Burst

   e.g. List of Element names

2. Will Elements be in a folder? What is the folder name?

   ☐ **Yes** ☐ **No**

   e.g. Folder Name

3. For each item included, will it be personalized for the user?

   ☐ **Yes** ☐ **No**

4. What mechanism will be used to personalize content?

   ☐ **User Map to set filter values**

   ☐ **Tableau trusted authentication for per-user images**

   ☐ **Dimension security model**

5. Should the Burst include attachments?

   ☐ **PPT**

   ☐ **PDF**

   ☐ **XLS**

6. Send Burst to FTP or Shared Folder in addition to email?

   ☐ **FTP**

   ☐ **Shared Folder**

THE BURST TEMPLATE

1. Are there custom display requirements for the Burst or is the default template sufficient?

    ☐ **Default**

    ☐ **Custom – provide a mock-up of requirements**

2. What is the email subject line?

    e.g. Subject of the email

3. What should be included in the email header?

    e.g. Logo

4. What should be included in the email footer?

    e.g. Contact details

5. Should users be able to unsubscribe from the Burst via a link?

    ☐ **Yes** ☐ **No**

BURST DISTRIBUTION

1. When should the Burst go out if all dependencies are satisfied? – specify a notification schedule.

   e.g. Every Monday at 8am PST

2. Are there any data collection triggers that should complete before the Burst can be sent out? If yes, which trigger is the latest?

   e.g. daily-datawarehouse-update

3. Which groups or users should be subscribed to the Burst?

   Groups: **e.g. Sales, Marketing**

   Individual Users: **e.g. user1, user2**