Creating a Slack rule and messages

The Slack integration allows you to set-up rules that analyze specific teams or individuals and send messages triggered by changes in their metrics or work patterns. The text of these messages is fully customizable and can be sent through any public channels or Direct Messages (DM) in your Slack workspace. All rules that are configured in your organization will appear in your rules table.

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Who can use this?

| Core	Plus
✓	✓

Set up the Slack integration

To set up an integration between your organization and Slack workspace, you must have the permission **manage Slack integration** within Flow. If you do not have this permission, please reach out to your organization Admin.

Setting up the Slack integration

Navigate to the **Settings** menu. Under **Report Settings,** click **Messages** in your side navigation. Click **Add to Slack** on the Slack tab.

> **Tip:** You will need permissions in your Slack workspace to install this application, otherwise you will be prompted to request a new app from an Admin.
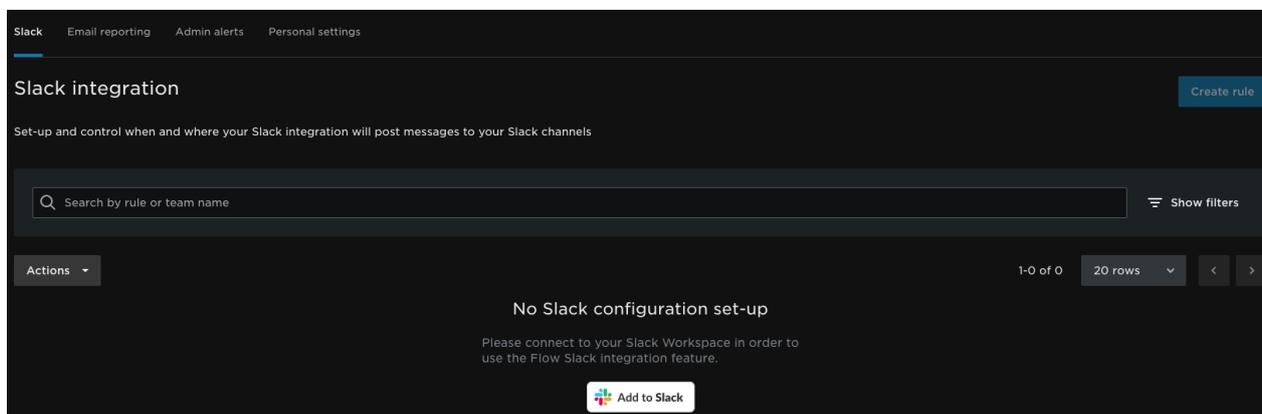
Then confirm permissions for the Flow Slack Bot. If you do not have adequate permissions in Slack to integration applications, you will see a pop-up to request the Slack integration.

Once you successfully connect Slack to your Flow account, you can add rules and create messages.

Removing the Slack integration

To remove your Slack integration, you must disconnect it via the Slack app store directly.

1. Go to **slack.com/apps/manage** and ensure you are updating the correct Slack workspace if you have admin permissions for multiple Slack spaces.

2. Navigate to **Apps** and find the Flow app.

3. Select **Remove App** at the bottom of the page and confirm in the confirmation window that you want to remove the application from the workspace.
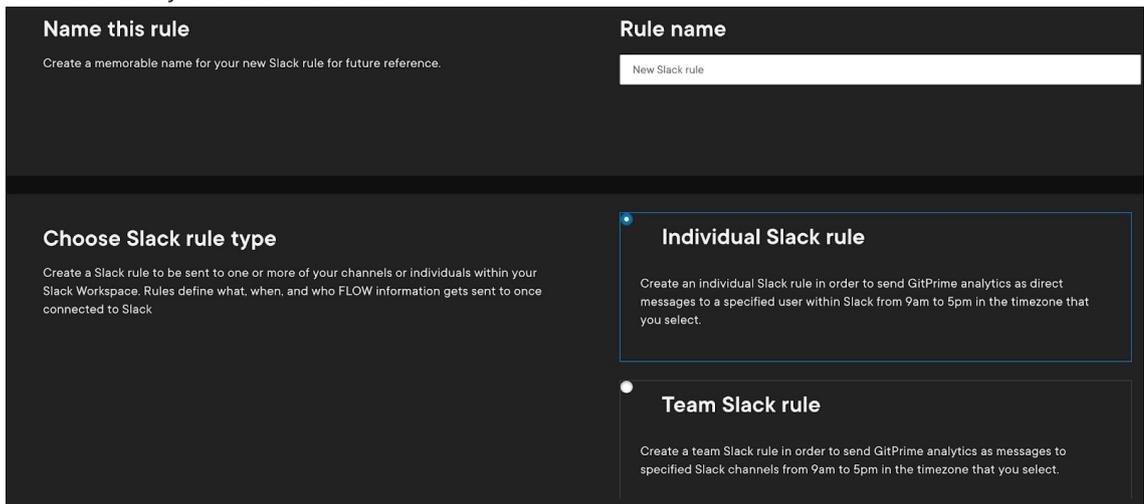
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Create a new rule

1. Click **Create rule** on the Slack integration page.
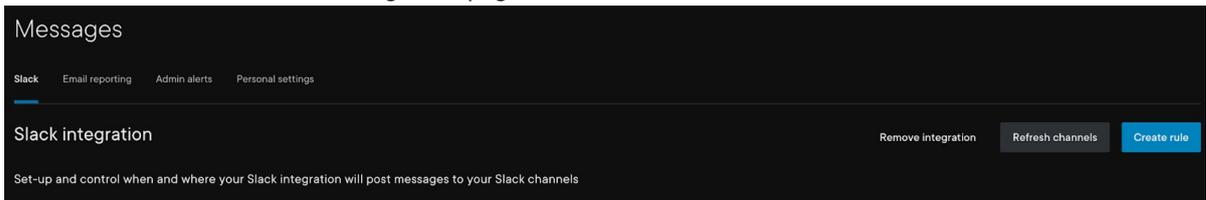
2. Name the rule and select **Individual** or **Team** rule type.

   - Individual rule: analyze a single user within Flow

   - Team rule: analyze one or more teams within Flow

3. Configure Flow's **Scope** for the rule then click **Next.** The options available here will vary based on if you selected **Individual Slack rule** or **Team Slack rule** from the previous screen. Individual rules can only select a single user within Flow, while team rules can select one or many teams as well as their children teams. To select all teams, scroll to the bottom of the teams list and click **Select all teams.**
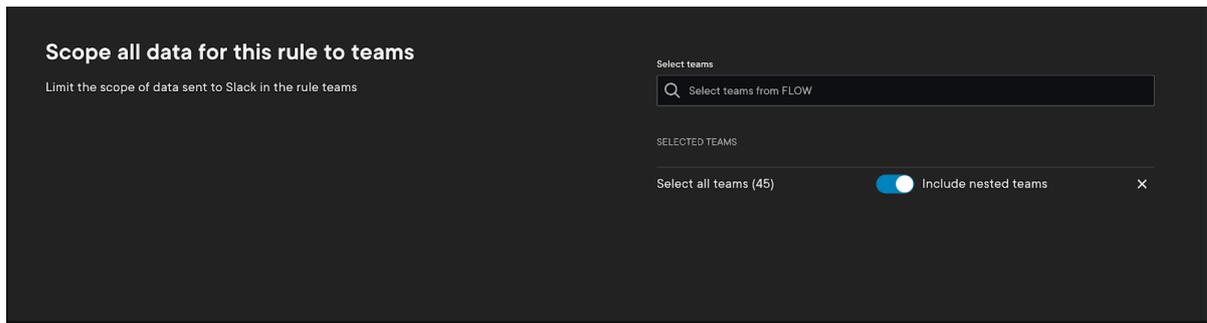
Both rule types allow you select one, many, or all repos to pull data from. To select all repos, scroll to the bottom of the repo list then click **Select all repos**.
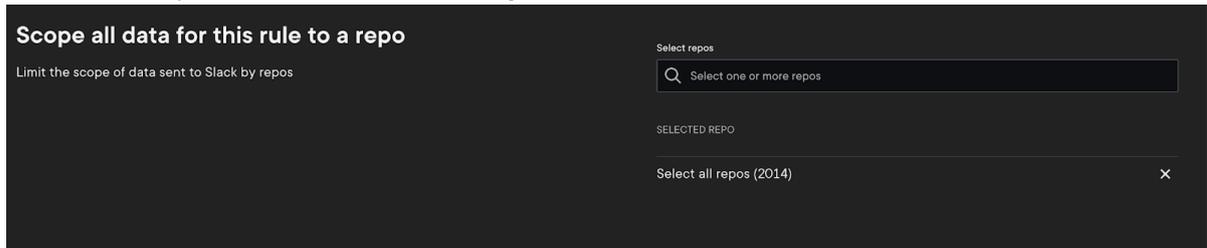
4. Click **Next**, then pick **Delivery Settings** for the rule**.**

   ○ **Select Slack channels and members**

     ▪ Individual rules - you can only send the messages to a single DM.

     ▪ Team rules - you can send the messages to one or more public channels or DMs in your workspace.

   ○ **Select a timezone**

     For both types of rules, you will select a timezone that determines when messages will send. Flow will only send messages to your Slack workspace between 9am and 5pm based on the timezone selected.

5. Click **Next**, then click **Add message**.
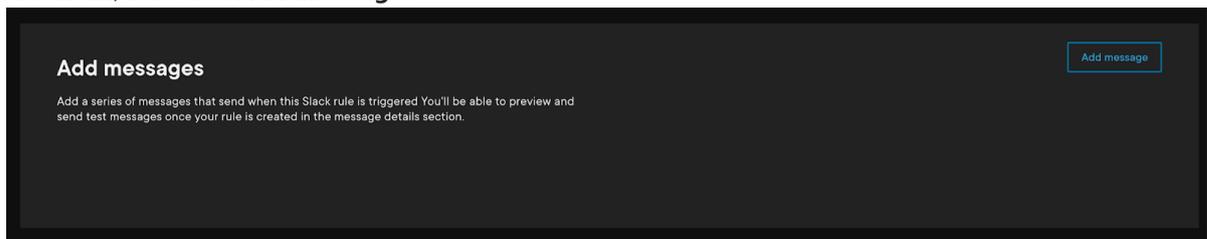
Adding messages determines what types of messages will be sent for that rule and the conditions that must be met for them to send. There are three categories of messages, each of which have their own specific message types.

Additionally, some messages are interactive and will send a first message with the option to receive additional information related to that message by clicking on a link in the message.

Message Categories:

- **Commit:** Contains message relating to commit activity from the selected repos

- **PR:** Contains messages relating to PR activity from the selected repos

- **Summary:** Contains messages for weekly or monthly summaries of both Commit and PR activity for the period

Overview of message categories/types and descriptions

Message Category	Message Type	Description	Interactive
Commit	Coding Streak	A % of the team committed code a specific number of days in a row. If team members are on coding streaks of different lengths, the highest common value will be shown.	Yes
	Committed code every day this week	Every contributor on the team committed code every day that week.	No
	% Gain in Fundamentals Metric	In a trailing period, a Code Fundamentals value increases by a specific percent.	No
	% Gain in Fundamentals Metric w/ stats	In a trailing period, a Code Fundamentals value increases by a specific percent with a comparison against a previous period.	Yes
PR	Increase in PRs created	In a trailing period, PRs created increases by a specific percent.	No
	Most active PRs this week	In a trailing period, a specific number of merged PRs have a threshold number of approvals or comments.	No
	No open PRs		

Message Category	Message Type	Description	Interactive
older than		No open PRs are older than a specific number of days.	Yes
	Decrease in old PRs	In a trailing period, count of PRs older than a number of days has decreased by a specific percent. The change is calculated as the first day of the trailing period vs. now.	No
	Increase in PRs merged with review	In a trailing period, the percent of PRs merged with review increases by a specific percent vs. the previous period.	No
	Decrease in PR Resolution metric	In a trailing period, a PR Resolution metric decreases by a specific percent versus the previous period.	No
Summary	Weekly Summary	Provides a weekly summary of raw commit and PR activity.	No
	Monthly Summary	Provides a monthly summary of raw commit and PR activity.	No

1. Select a message **Category** and **Message type**

2. Select threshold limits and specific Flow metrics for the specific message type if available. Different messages will have various selectable and modifiable options.

   - **Trailing date range:** A whole number between 1 and 365 that is used to set the look back period for that rule.

   - **Y%:** A specific percent change threshold that must be met from 0 to 100.

   - **Metric picker:** Some messages allow you to pick between pre-selected metrics in a dropdown.

   - **Count of "item":** A count of activity items (commits, PRs, PR comments, etc.) that must be met. For example, in the below message, **Decrease in PR Resolution metric,** you will see the following options.

- Input a value from 1 - 365 to use as the length of the "period / period" value Flow should compare. Flow will look at the trailing 14 days, vs. the 14 day period prior to that.

- A metric from within Flow to be selected. In this case, we have defaulted to Time to Resolve from the PR Resolution report. The other option on this message is Time to First Comment from the PR Resolution report.

- A percent increase (or decrease) threshold that must be met Period 1 / Period 2 for the message to send.

3. Customize message text.

- For each message, you will see a series of variable tags that can be inserted into the message text box that is pre-populated with a default message to be delivered.

- **Raw text:** You can free form input raw text into the box to match how you and your team like to communicate. The input does not natively support emojis, but when Slack receives the raw text, it will parse its native emoji language :star2: into the proper image.

- This includes any :custom-emoji: that your Slack workspace has created, which will be rendered once delivered to the Slack workspace.

- **Variable tags:** The variable tags contain pre-defined or calculated values from Flow such as a percent change or list of items such as PRs. Hovering on a variable tag outside of the customization area, will show example data for that specific tag. Clicking on the tag will insert it into the customization area at the active location of the cursor.

- To delete a tag, simply delete the entire item as a single block of text. The toggle Show variable and Show data determines if the tags that are in the message preview show the variable name or example data that would display when the message is delivered.
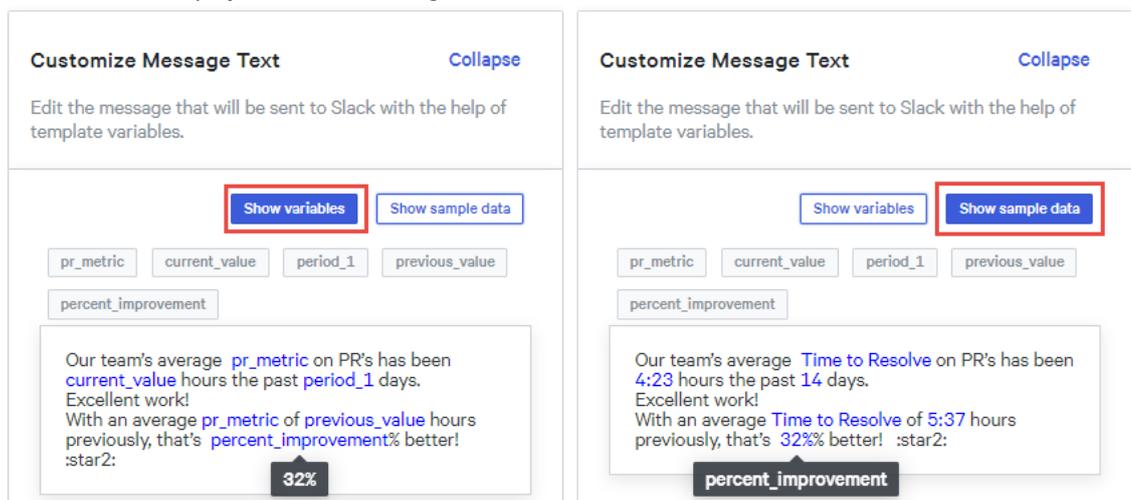
4. Two part messages

- Some messages contain two parts that can send additional information about the activity of the user or team. The second part of the message can be customized just like the first, but you need to be sure to include the variable tag **{% @msg-part2-link %}** in the body of the first message so you can request that information.

- When the tag is inserted into the body of the first message, you will see this format:

  - [Some default text] {% @msg-part2-link %}

  - The text within the square brackets [] can be customize and is what the link for the second message will display, the variable tag in the curly brackets {} behaves just like any other variable tag and is customizable. When the link is clicked within your Slack workspace, it will trigger the

second part of the message to be sent. Each link will only send additional information one time.

Summary of interactive message types

Message Category	Message Type	Description	Interactive
Commit	Coding Streak	A % of the team committed code a specific number of days in a row.	Yes
	% Gain in Fundamentals Metric w/ stats	In a trailing period, a Code Fundamentals value increases by a specific percent with a comparison against a previous period.	Yes
PR	No open PRs older than	No open PRs are older than a specific number of days.	Yes

Testing Slack rules and messages

Once a rule has been set-up and messages have been added to it, you can test each message by sending them to any Slack channel you choose. To test a specific rules message, navigate to that rules details by clicking on the Rule name on the Slack integration page under **Messages**.

1. Click on the rule name.

2. Navigate to the **Messages** on the rules details screen.
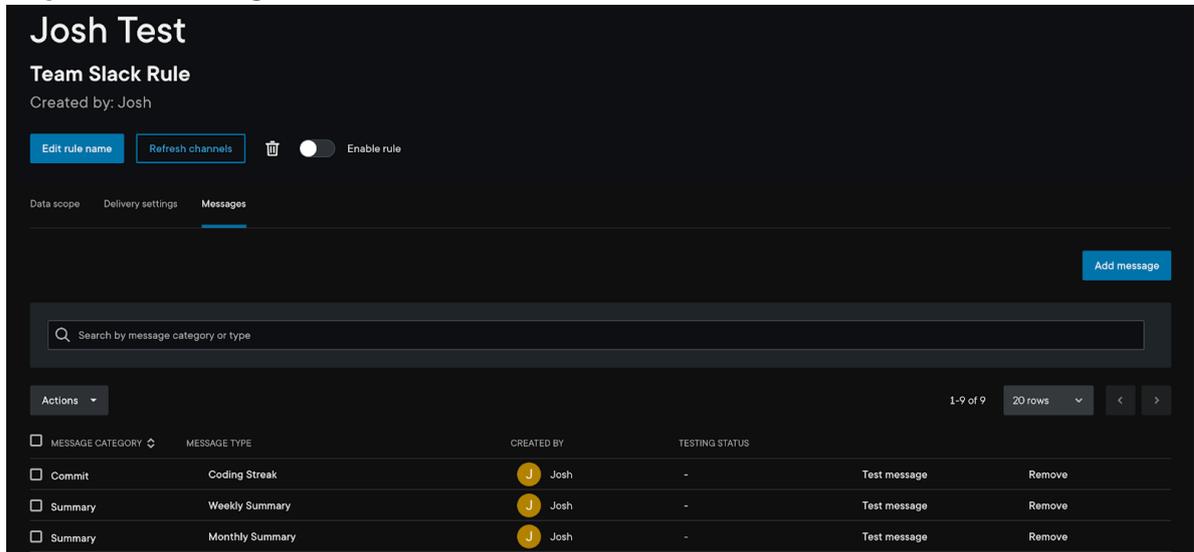
3. Click **Test message** next to one of the messages you would like to test.

   - This will open a modal allowing you to pick a Slack channel to send the test message.

4. Select the Slack channel or individual you want to send the test to.

5. Click **Select**

6. Click **Test Message** next to the rule you want to test.

7. When sent, each message will send with the text supplied in its template as well as the variable tags where the calculated values would be displayed. Success and Error banners will be shown next to each message upon testing.

Slack rules and messages: summary of selectable and customizable items

	Individual Rule	Team Rule
Flow Scope: User(s) / Team(s)	Analyzes a single user from Flow only. Cannot analyze multiple users at once or a User and a Team	Can analyze a single or multiple teams in Flow with or without their nested teams.
Flow Scope: Repo(s)	Can analyze one or more repos that have been imported into Flow.	Can analyze one or more repos that have been imported into Flow.
Delivery	Can be sent to a single DM within the	Can be sent to one or more public slack channels or

	Individual Rule	Team Rule
Settings: Slack channel	connected workspace. Cannot be sent to multiple DMs or public/private group channels.	individual DMs. Cannot be sent to private group channels.
Delivery Settings: Timezone	Can be sent to any timezone available, and should match the timezone that the selected recipient from the delivery settings is predominantly located in.	Can be sent to any timezone available. Messages will only be delivered between 9-5 based on that timezone.
Messages	Any type of message can be added to the rule. Only the selected Flow user from the **Scope** selection will be analyzed when generating messages.	Any type of message can be added to the rule. Any contributors on the selected teams will be analyzed when generating messages. If **All teams** is selected, then all users in your organization that are included in metrics will be analyzed.

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If you need help, please email support@pluralsight.com () for 24/7 assistance.