

Release 5.5.0/5.5.1

Metric Insights 5.5 introduces powerful new Reporting features that strike the right balance between pragmatic functionality and ease of use. Bursting to Slack is now as easy as checking a box, and we have made further investment in our Security Model.

- **Reports** now include multiple levels of filtering (global, or for individual components), new default charts, the ability to add arbitrary/custom charts (we support all the major charting libraries, including Highcharts), and more advanced conditional formatting. In total, there are 8 new major enhancements to Reporting.
- **Bursting to Slack** allows you to easily select a target Slack channel, a set of elements, and a schedule so that you can post Reports and Metrics directly to Slack.
- **Security Model enhancements for Power Users** to support multi-tenant enterprise deployments, including privileges for editing Portal Pages and Notification Schedules.
- **Column Aliases** for Datasets sourced from Tableau provides a failsafe for situations where a column/field name in your Tableau source changes.
- [5.5.1] Users can benefit from a number of new features and **My Mobile** application improvements.

Major Features

1. Dataset Report Enhancements

Dataset Reports are production-ready in Release 5.5! They are now set as the default Report type (replacing what we now call Legacy Reports). Legacy Reports will continue to work, and can be enabled as a secondary option if necessary.

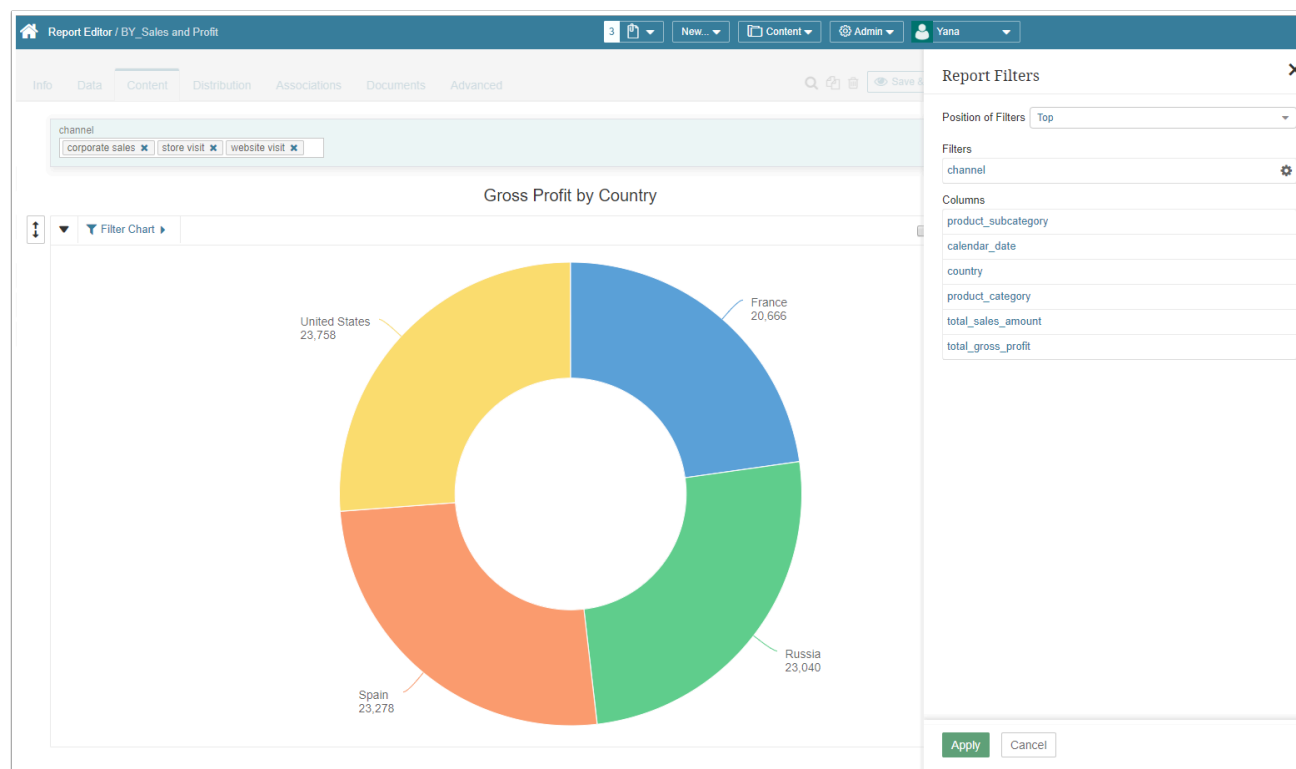
1.1. Data Filtering

Dataset Reports in 5.5 support the following types of Data Filtering:

1. **Report Filters (global)** that apply to *all* Report Components (Tables, Charts and Visualizations)
2. **Table/Chart Filters** that affect individual Table or Chart components

Report Filters functionality is exemplified below.

- To learn more about different types of Filters, go to [Applying Filters in Dataset Reports](#)
- Chart filtering is described in [Creating Charts in Dataset Reporting](#)

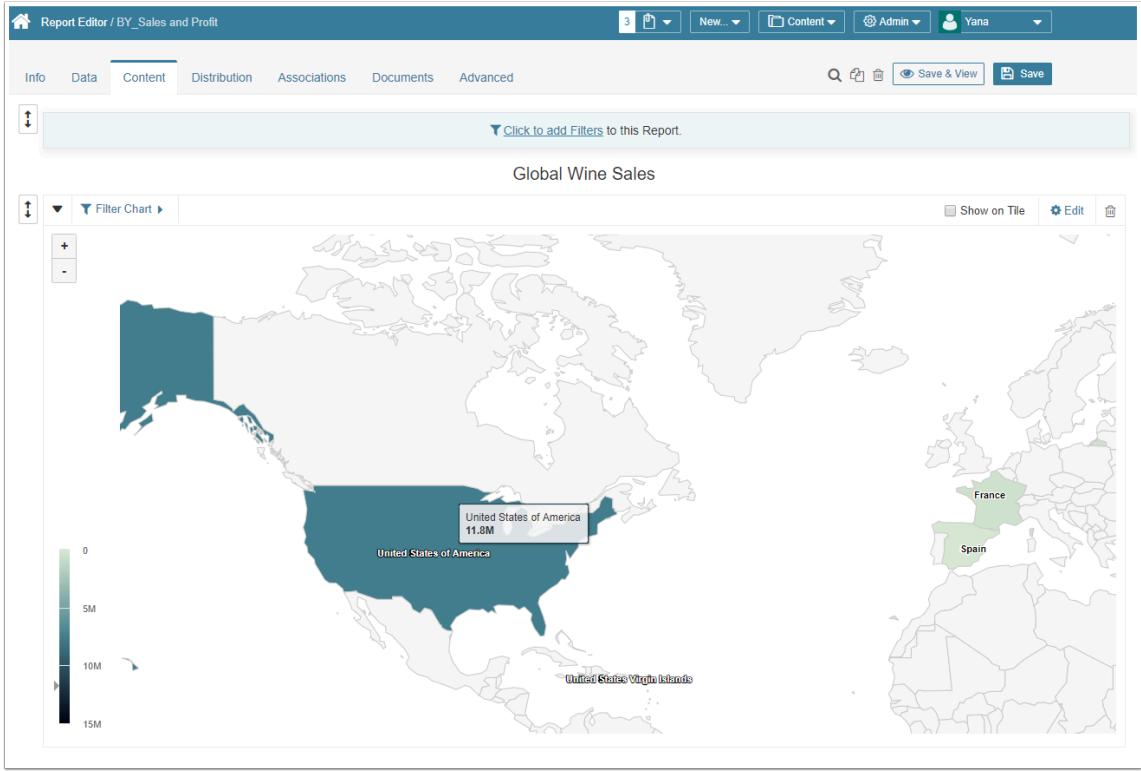


1.2. New Charting Capabilities

The comprehensive list of Charting options includes:

1. **Line/Bar/Area charts:** visualize trends over a period of time; can be used to compare data for several measures
2. **Pie charts:** display the share of different values in relation to a whole
3. **Map charts:** compare values and show categories across various geographical regions
4. **Bubble charts:** objectify data distribution or clustering trends
5. **Funnel charts:** show progressions of measures through stages
6. **Range charts:** represent data variability for different measures

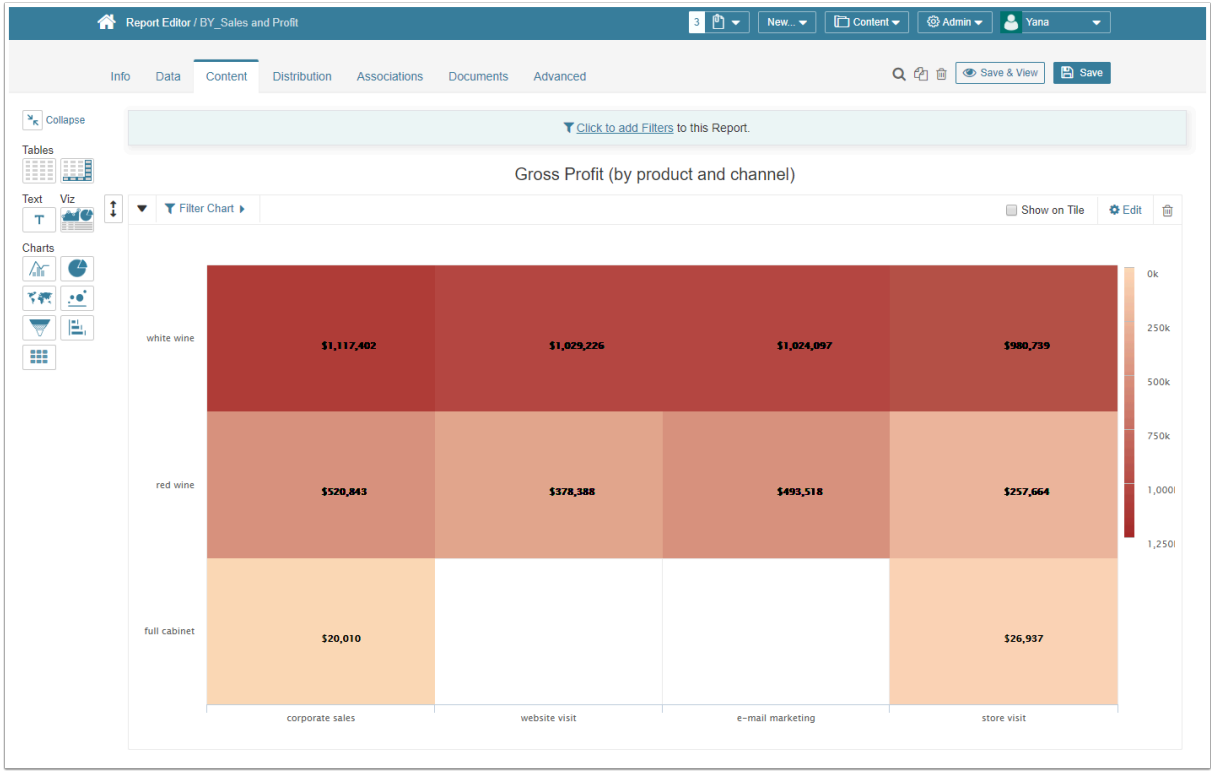
For details, refer to [Creating Charts in Dataset Reporting](#)



1.3. Custom Charts

Users can now design their own Charts and make them available for Dataset Reporting.

- The full scope of functionality is reviewed in [Adding Custom Charts to Dataset Reports](#)



1.4. Rich Text Blocks: formatting

Users can now add blocks of text to your Dataset Reports to make them even more informative and compelling.

To use this option, drag the Text tile to the Report Canvas and add the required text information.

The following formatting functionality is supported:

1. Undo/redo (change history)
2. Bold, Italic, text alignment (left, center, right)
3. Hyperlinking
4. Font color, background color
5. Font family
6. Font size
7. [5.5.1] Tables
8. [5.5.1] Ordered and Unordered lists
9. [5.5.1] Source code (HTML) viewing and editing

The screenshot displays the 'Report Editor / BY_Sales and Profit' interface. The main content area is titled 'Wine Sales Market'. It features a rich text block with the following content:

WINE SALES

Wine Sales Revenue

- Domestic \$41.8 billion
- Imports \$20.9 billion
- Total \$62.7 billion

Top Export Destinations

1. European Union
2. Canada
3. Japan
4. China
5. Mexico

Sales by Product Category

US State	Channel	Product Category	Profit
Alabama	e-mail marketing	wine	5M
Arizona	e-mail marketing	wine	20M
Arkansas	e-mail marketing	wine	25M
California	e-mail marketing	wine	50M

Learn more from [Decanter](#)

The interface also includes a sidebar with 'Tables', 'Text', and 'Charts' options, and a top navigation bar with 'Info', 'Data', 'Content', 'Distribution', 'Associations', 'Documents', and 'Advanced' tabs.

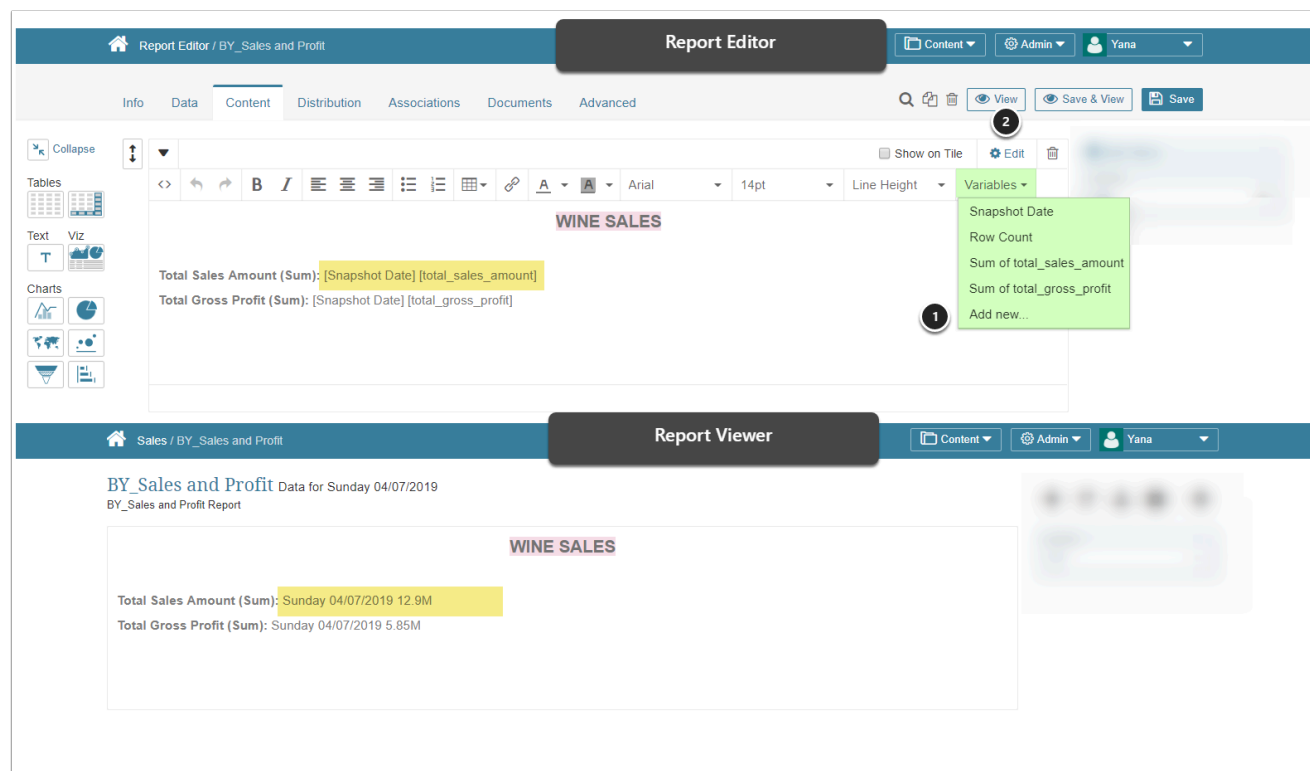
1.5. [5.5.1] Rich Text Blocks: variables

Variables in Rich Text Blocks allow Users to add high-level KPIs to their Dataset Reports.

The default list of Variables can be extended from:

1. the Variables dropdown
2. the Text Block Editor

See details in [Working with Text Blocks](#)

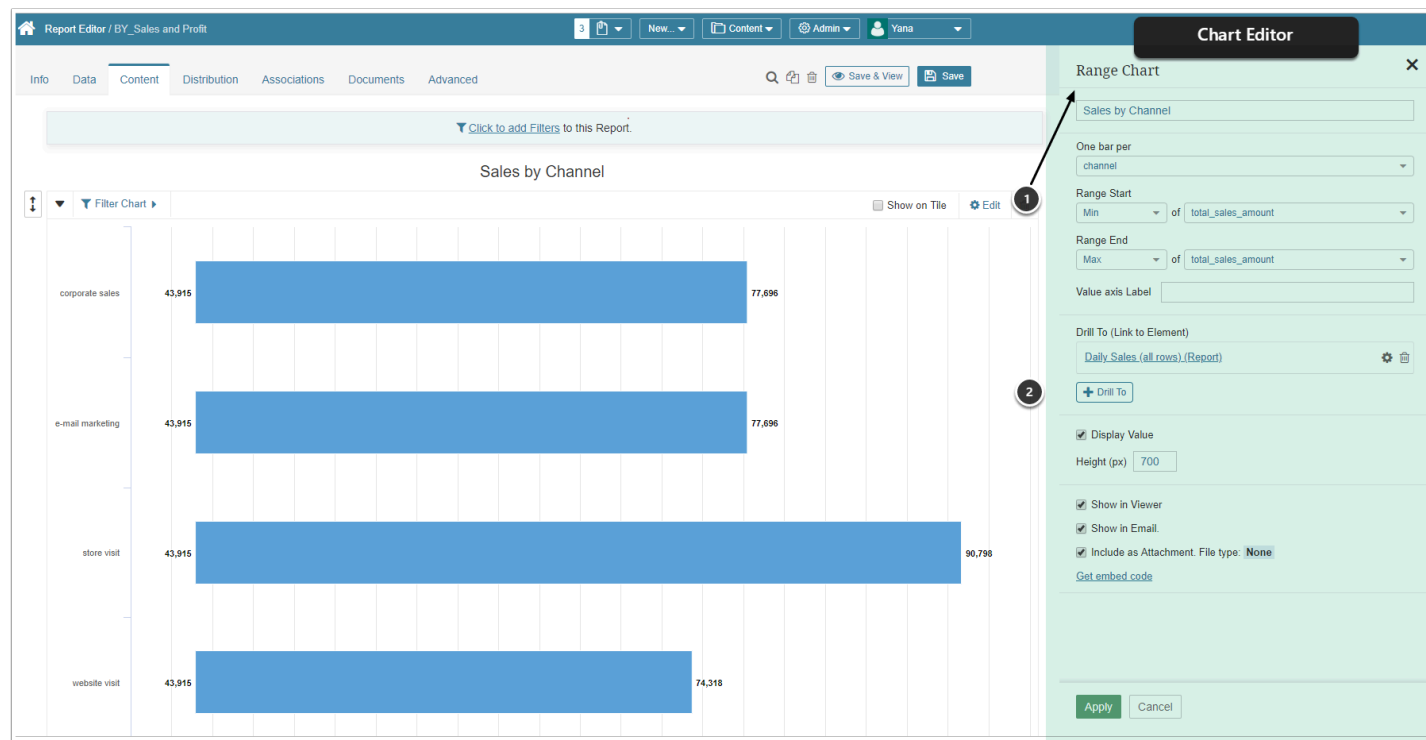


1.6. Elements for Further Analysis (Drill To other Elements)

"Elements for further analysis" (other Reports, Metrics, Datasets and Visualizations) can be added to Dataset Report Components.

NOTE: Elements can be appended to a Dataset Report when creating or editing a Chart.

1. Go to the Chart Editor: it will open automatically when adding a Chart; alternatively, you can use the **Edit (Gear) button**
2. Click **[+Drill To]** to access a list of Metric Insights' elements that can be attached to your Chart



1.7. Tables: Sections and Grouping

As of Release 5.5, Table columns can be arranged into Groups and Sections for a more visually compelling display.

This is achieved by:

1. Activating the corresponding options
2. Dragging the required columns to the respective **Sections** and **Grouping** blocks

For more detailed information, refer to [Using Sections and Groups in Dataset Report Tables](#)

Report Editor / BY_Sales and Profit

Info Data Content Distribution Associations Documents Advanced

Click to add Filters to this Report.

Sales Report

Filter Table Reset Columns

France e-mail marketing			
product_subcategory	product_category	calendar_date	total_sales_amount
white wine	wine	2018-08-03 00:00:00	47,293
		2018-06-20 00:00:00	47,293
		2018-05-19 00:00:00	47,293
		2018-05-02 00:00:00	47,293
		2018-04-08 00:00:00	50,672
		2018-07-01 00:00:00	54,050
		2018-06-16 00:00:00	57,428
France store visit			
		2018-05-28 00:00:00	47,293
France website visit			
red wine		2018-06-04 00:00:00	48,300
		2018-07-13 00:00:00	48,875
white wine		2018-05-30 00:00:00	47,293
Russia e-mail marketing			
		2018-08-06 00:00:00	47,293
		2018-07-10 00:00:00	49,400
		2018-08-07 00:00:00	60,806
		2018-07-04 00:00:00	77,696
Russia store visit			
		2018-07-02 00:00:00	54,050
		2018-06-26 00:00:00	57,428
Russia website visit			
red wine		2018-05-14 00:00:00	46,000
Spain website visit			
white wine		2018-06-29 00:00:00	50,672
Overall Total:			986,428

Table Configuration Panel:

- Table:** Sales Report
- Font:** Arial, Helvetica, sans-serif, Size: 12
- Header Format:** A B I
- Sections:** country, channel (indicated by arrow 1)
- Grouping:** product_subcategory, product_category (indicated by arrow 2)
- Columns (drag & drop to sort):** calendar_date, total_sales_amount, total_gross_profit
- Sort Order:**
 - country: A to Z
 - channel: A to Z
 - product_subcategory: A to Z
 - product_category: A to Z
 - total_gross_profit: Ascending
- Conditional Formatting:** Apply, Cancel

1.8. Tables: Aggregation

Aggregation option has been added to Dataset Reports, so that Users can apply aggregation in situ when working with Report Tables.

Supported aggregate functions are:

1. Sum
2. Min
3. Max
4. Avg
5. Count
6. Count Distinct

For further information, refer to [Adding Column Aggregation to Dataset Report Tables](#)

Report Editor / BY_Sales and Profit

3 New... Content Admin Yana

Info Data **Content** Distribution Associations Documents Advanced

Click to add Filters to this Report.

Sum of Wine Sales

Filter Table

channel	total_sales_amount	country	product_category	product_subcategory
corporate sales	1.08M			
e-mail marketing	1.07M			
store visit	557,750			
website visit	97,175			
website visit	688,275			
corporate sales	2.38M			
e-mail marketing	351,322			
e-mail marketing	1.68M			
store visit	47,293			
store visit	1.99M			
website visit	47,293			
website visit	50,672			
website visit	2.15M			
corporate sales	67,558			
store visit	90,798			

Reset Columns Show on Tile Edit

country aggregation menu: Sorting, Alignment, Aggregation (None, Sum, Min, Max, Avg, Count, Count Distinct), Text Color, Fill Color, Hide Column, Freeze Column, Edit Column

1.9. Tables: Conditional Formatting

Conditional Formatting has also been redesigned. The scope of changes is as follows:

1. Formatting rules are formulated using the modified Builder
2. Formatting can now be applied to the selected column or row

Report Editor / BY_Sales and Profit

3 New... Content Admin

Info Data **Content** Distribution Associations Documents Advanced

Click to add Filters to this Report.

Wine Sales in the US

Filter Table

calendar_date	product_category	product_subcategory	channel	country	total_sales_amount
2018-07-06 00:00:00	wine	white wine	website visit	United States	43,915
2018-07-10 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-07-11 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-07-13 00:00:00	wine	white wine	store visit	United States	43,915
2018-07-26 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-07-27 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-07-27 00:00:00	wine	white wine	e-mail marketing	United States	43,915
2018-07-29 00:00:00	wine	white wine	e-mail marketing	United States	43,915
2018-08-03 00:00:00	wine	white wine	website visit	United States	43,915
2018-08-05 00:00:00	wine	white wine	e-mail marketing	United States	43,915
2018-08-09 00:00:00	wine	white wine	website visit	United States	43,915
2018-08-10 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-08-13 00:00:00	wine	white wine	corporate sales	United States	43,915
2018-07-08 00:00:00	wine	white wine	e-mail marketing	United States	44,200
2018-07-20 00:00:00	wine	white wine	store visit	United States	44,200
2018-08-01 00:00:00	wine	white wine	website visit	United States	44,200
2018-08-07 00:00:00	wine	white wine	corporate sales	United States	44,200
2018-07-05 00:00:00	wine	red wine	corporate sales	United States	46,000
2018-07-14 00:00:00	wine	red wine	e-mail marketing	United States	46,000
2018-07-14 00:00:00	wine	red wine	website visit	United States	46,000
2018-07-16 00:00:00	wine	red wine	website visit	United States	46,000
2018-07-18 00:00:00	wine	red wine	corporate sales	United States	46,000
2018-07-22 00:00:00	wine	red wine	corporate sales	United States	46,000
2018-07-26 00:00:00	wine	red wine	e-mail marketing	United States	46,000
2018-08-01 00:00:00	wine	red wine	e-mail marketing	United States	46,000
2018-08-10 00:00:00	wine	red wine	website visit	United States	46,000
2018-08-12 00:00:00	wine	red wine	e-mail marketing	United States	46,000

Reset Columns

Formatting Builder for Numeric Fields

Conditional Formatting

When total_sales_amount

is greater than or equal to a value

is greater than

is less than

is less than or equal to

does not equal

is empty

is not empty

Entire Row

Formatting Builder for Text Fields

Conditional Formatting

When channel

exactly matches a value

exactly matches

contains

does not contain

is in list

is not in list

does not equal

starts with

is empty

is not empty

channel

Done Cancel

1.10. [5.5.1] Tables: Row Count changes

In Version 5.5.1, Row Count configuration settings have been extended.

Users can now change how the Table Row Count is displayed on the Homepage when there are:

- no rows
- 1 row
- multiple rows

To configure the Row Count for a Table:

1. Activate **"Show on Tile"**
2. Click **[Edit]** to open the Table Editor
3. Modify the **Row Count settings** as required

The screenshot shows the 'Report Editor / BY_Sales and Profit' interface. The main table is titled 'Gross Profit by Channel' and contains data for 'corporate sales'. The table has three columns: 'calendar_date', 'product_subcategory', and 'total_gross_profit'. The data rows show various dates and product categories like 'red wine' and 'white wine' with their corresponding gross profit values.

On the right side, the 'Table' configuration panel is open. It shows the table's structure with columns like 'product_category (hidden)', 'product_subcategory', 'country (hidden)', 'total_sales_amount (hidden)', and 'total_gross_profit'. Below this, there are settings for 'Sort Order' (set to 'channel' and 'A to Z'), 'Conditional Formatting' (set to 'No data'), and 'Grand Totals' (set to 'No data'). The 'Show on Tile' section is highlighted with a red box and a red circle, showing the 'row counts' dropdown menu. The 'When Report has' section shows options for 'No exceptions', 'exception', and 'exceptions', with '1 row' and 'multiple rows' selected. The 'Show in Viewer' and 'Show in Email' checkboxes are also visible.

1.11. Dataset Report Viewer changes

Dataset Report Viewer has been revamped to ensure consistent and seamless User experience.

- **NEW:** Dataset Report Filters can now be displayed and optionally positioned in Viewer (Top/ Left/Right).

The example below shows Left positioning of Dataset Report Filters (that has been changed from default "Top").

Bursts / Slack Integration Burst

Content Customize Subscriptions Run History

Name: Slack Integration Burst

Content: Selected Tiles Folder Favorites

Display Name	
Corporate Sales Overview	x
Canada Tableau Sales Analysis	x
Canada PowerBI Sales Analysis	x
Canada Qlikview Sales Analysis	x
Canada Daily Sales	x
Canada Daily Cost	x

+ Add Tiles

Schedule: Daily M-F (On Mon, Tue, Wed, Thu & Fri at 7:00)

Send Burst via:

- ☐ Email
- ☐ FTP
- ☐ Drive
- ☒ Slack Channel: general

1 2

3. Security Model Enhancements

Portal Pages

Starting in Version 5.5, Power Users can be granted access to the Portal Page functionality that has been previously used exclusively by Admins.

Respective privileges that can be assigned to Power Users allow to:

Create Portal Pages (*Parent*)

Children:

1. Build Portal Pages Using HTML/CSS/JavaScript
2. Create Portal Page Layouts
3. Create Portal Page Templates
4. Manage Portal Page Assets
5. Allow Power Users to grant Portal Page, Template and/or Layout access to any User or Group

View more on [Portal Page Security \(Release 5.5 and beyond\)](#)

Notification Schedules

A new Privilege allows Power Users to access the full Notification Schedule Editor and grant Permissions to Public Schedules to Groups and other users as long as the PU has Edit Access to the Schedule. There is also an extended Security Privilege that allows access to be granted to any Group or User.

[5.5.1] CSV and Excel Restrictions

The Security Model has been enhanced with Download/Attachment restrictions that can be set for an instance using the new Config Variable "Disable CSV & Excel Data Downloads". When this parameter is set to "Y" (activated), it prevents all Regular and Power Users from downloading from Element Viewers, receiving CSV/Excel as email attachments, pushing them to FTP/Share File) via a Burst unless a User has the new "Download CSV and Excel Data" Privilege.

View more detail in [CSV/Excel Download Restrictions](#)

[5.5.1] Bulk Change

Power Users can now apply Bulk Changes to elements, a function previously restricted to Admins. A Power User can select Elements to which User has Edit Access for Bulk Changes and is restricted in choosing new settings as follows:

- Categories to which the User has either Edit Access to the Category or View Access AND the "Assign Category with View Access to Elements/Datasets" Privilege
- Data Collection Triggers to which User has at least Use Access

Miscellaneous

1. "Access Target View" Privilege has been removed for all users; it is no longer needed since any user can view the Targets if the Metric has them.
2. If a User Map has been applied to Reports built from Datasets, the restriction not to include Admins has been removed. An Admin or PU (Power User) with Edit Access to the Dataset or Dataset Report can filter displays on the Dataset Viewer or Report Editor to only see data that a user in the User Map can see.
3. "Share Favorites" Privilege has been included in the "Personal Settings" group with the ability to assign it to Regular and Power Users and it allows the user to share their Favorites with Groups to which they belong and to user members of those Groups. This restores a previous Privilege that had been removed.
4. Power Users have the ability to *create Smart Folders from the Folder Editor* when the PU has Edit Access to the Dataset that contains the tiles to be included.
5. For performance reasons, the *Security Model only checks to ensure that a user has access to an object* at the point at which the user tries to access its Viewer or Editor. If the user does not have full access, including necessary Category, Data Source, component element or other Permission and related Create Content Privileges, a standard Error Page is presented to the user noting that Privileges or Permissions are missing and advising contacting an Admin for resolution.

3.1. [5.5.1] Managing Burst Subscriptions via a User Map

Burst Subscriptions can now be maintained via User Maps. The list of Users that are subscribed to a Burst is displayed in corresponding grid in **My Notifications Editor > Subscriptions tab** alongside the dates when those Users were *Added* and *Unsubscribed*.

- Activate the **"Set Subscribers via User Map"** toggle to see the list User Maps available in the dropdown.

For more information, refer to [Define Subscriptions via a User Map](#)

My Notifications / Daily Sales Burst (BY)

Content Customize Subscriptions Run History

Set Subscribers via User Map Sales Operations User Map

☒ Send to Burst owner (Yana Byalkivska, yana@metricinsights.com) too

Users Subscribed via User Map

Name	Added	Unsubscribed
Anna Kennedy	2019-04-10 14:02:36	2019-04-10 14:32:54
Elena Davis	2019-04-10 14:02:36	
Lana Stone	2019-04-10 14:02:36	
Yana Byalkivska	2019-04-10 14:02:36	

● Disabled Users ● Notifications OFF

4. Column Aliases for Datasets sourced from Tableau

Was a column renamed in Tableau? Instead of rebuilding all content built from the Tableau Data Source, you can now add a column alias that will link the new column name to the column in your Metric Insights Dataset / Element. Aliasing is available in the Visual Editors of Elements / Datasets sourced from Tableau.

Datasets / Tableau Dataset

Data Source: Tableau - CT_Tableau-prod (Plug-in)

Data collection trigger: daily-reporting-refresh

Tableau Worksheet: Custom Server Admin Views / Monthly Server Usage

There are no Filters

Plugin command: Visual Command

Select Columns

You may use :measurement_time in your statement to bind in a date or series of date values.

Tableau Query Builder

Field	Alias	Type	Override	Aggregation
<input checked="" type="checkbox"/> Count of records		Integer		
<input type="checkbox"/> 30 Min Increment	Add	Date		
<input type="checkbox"/> Month of created_at (EST)	Add	Date		
<input type="checkbox"/> Median Users	Add	Decimal		

+ Derived field + Count

Save or cancel

Select Columns

5. Dropbox Paper Plugin

The Dropbox Paper plugin allows fetching images from a Dropbox account as a list of Dropbox Paper Objects and use them to populate Metric Insights Datasets or Elements.

- Find more information in [How to collect data from Dropbox Paper](#)

6. Homepage Folder/Category Hierarchy Display

The Metric Insights Homepage can now be configured to display the selected Folder or Category and all of its children in a single click (*e.g., clicking on Folder A will display the content of Folder A, Folder A1 and Folder A2 simultaneously*). Parent Folders/Categories are represented as headings and Child Categories/Folders as subheadings — a breadcrumb trail allows users to easily move between different levels of hierarchy.



Contact support@metricinsights.com for help with configuration.

7. [5.5.1] My Mobile

7.1. QR Code Login

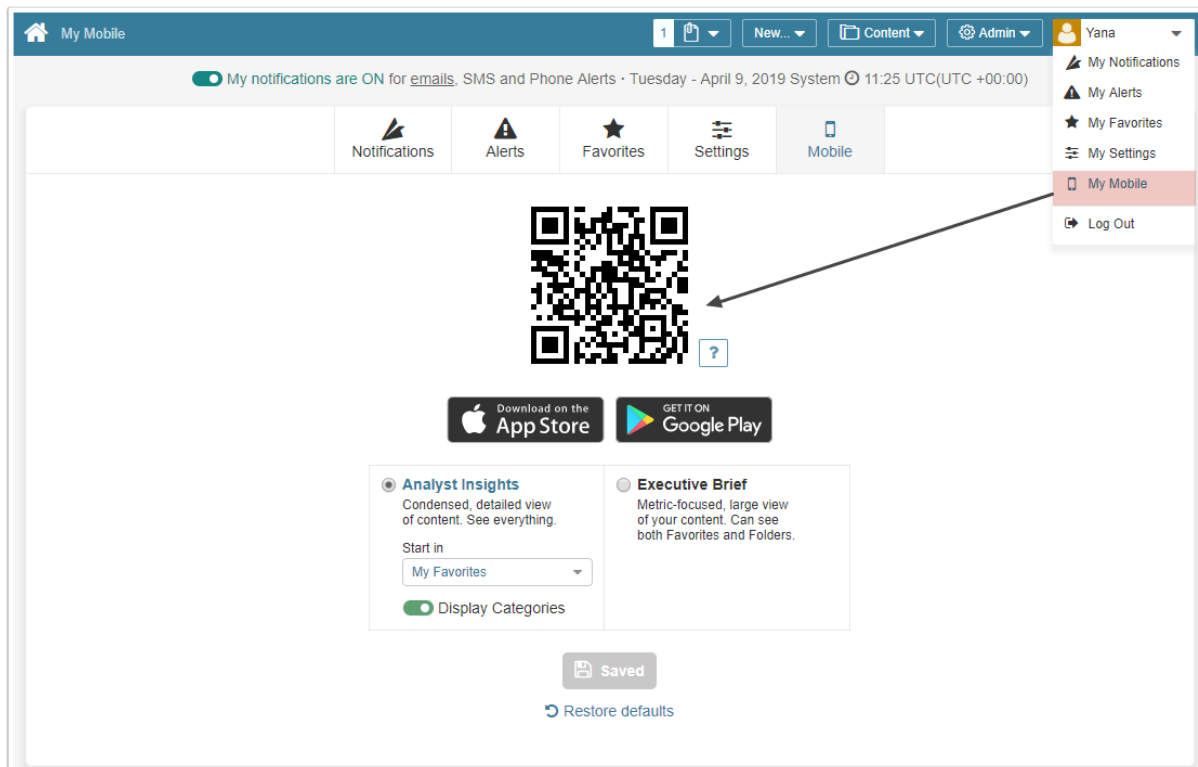
5.5.1 My Mobile application uses QR Codes to make setting instance URL fast and easy.

The QR code:

- includes the **current instance URL**
- does not include Username and Password

Obtain the QR Code from **My Mobile page** in the MI web application. Scan the QR code with the MI mobile app to pair with the server.

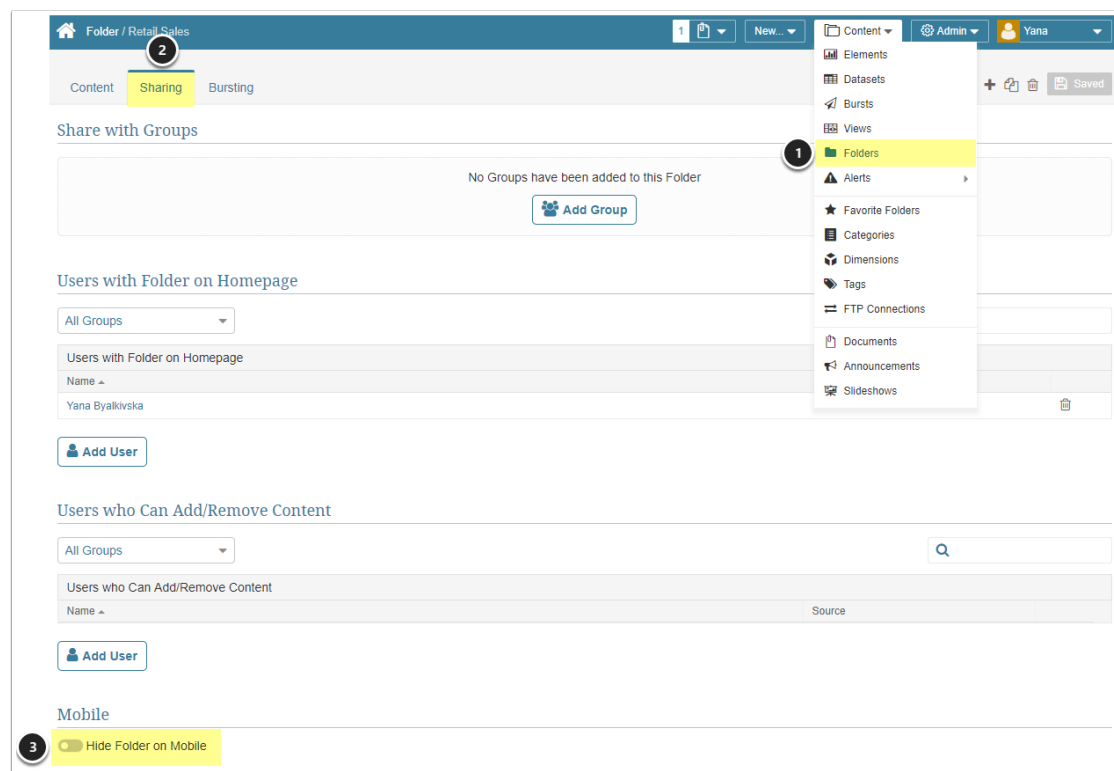
Learn more from [\[iOS, Android\] Set instance URL via QR code](#)



7.2. Ability to hide Folders from Mobile

In order to hide a certain Folder from Mobile:

1. Access the Folder via **Content > Folders** > select a Folder
2. Go to the **Folder Editor > Sharing tab**
3. Switch "**Hide Folder on Mobile**" to ON

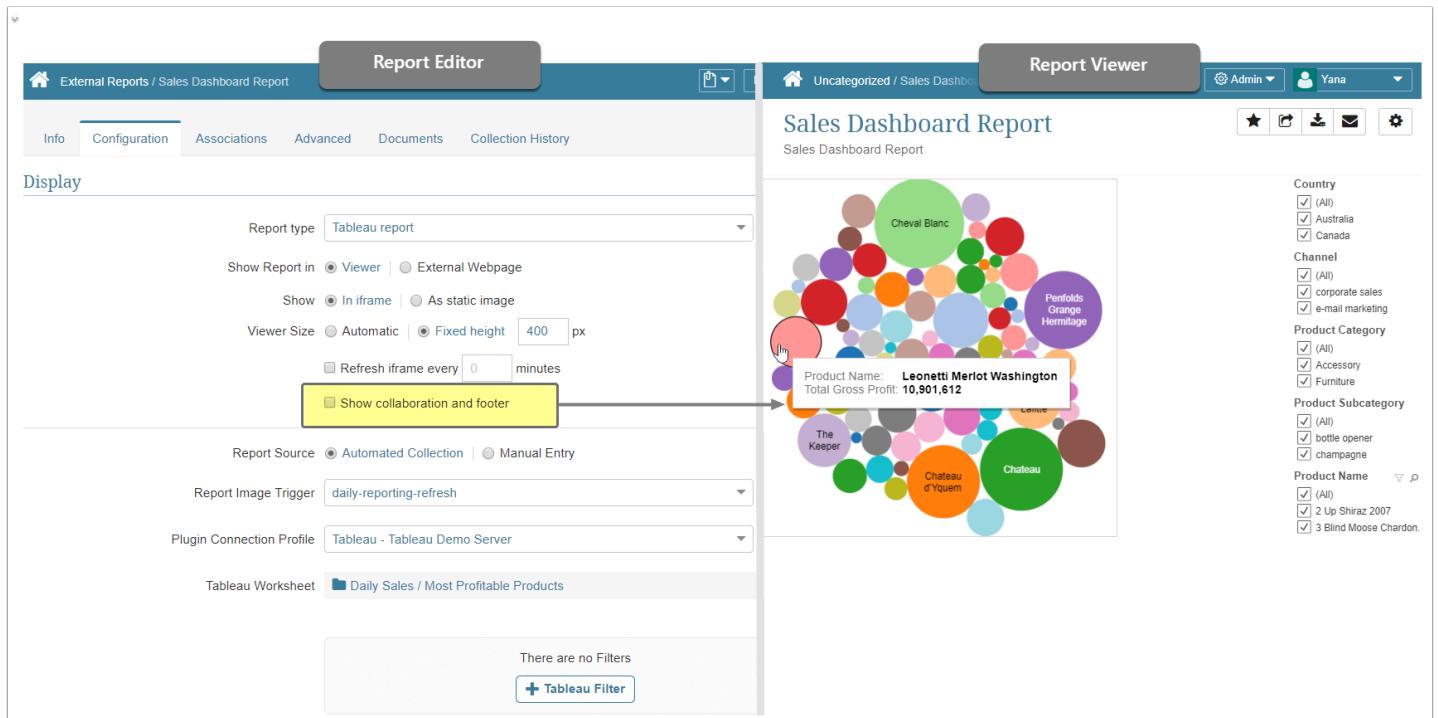


8. [5.5.1] External Reports: option to hide Collaboration and Footer

The new check box **"Show collaboration and footer"** in the External Report Editor allows Users to reformat the appearance of Viewer by disabling irrelevant options.

Collaboration and footer are displayed by default. If required, Users can clear the corresponding check box.

- To learn more, go to [What are External Reports?](#)



9. Miscellaneous

Dataset Reports

1. [5.5.1] Dataset Reports can now be delivered via a Burst that uses the SMS template.
2. [5.5.1] Explicit "View" button has been added to the Dataset Report Editor, allowing Users to View their Reports without saving any changes.

User statistics

1. [5.5.1] Homepage search information is now logged to the database (homepage_search table), including: username, time of search, and the number or tiles that were returned.

Datasets

1. [5.5.1] "Created by" Filter has been added to the Dataset Views List Page.

Security

1. Users can be provided with a URL that logs any User in as a Guest without requiring username or password.

10. Known Issues

Dataset Reports

1. If sorting is changed, links will lead to the wrong External Visualization.

Plugins

1. Microstrategy: At times, a PDF image may be truncated in an External Report.

11. Bugs fixed

Plugins

1. Qlik Sense: authentication with client certificate is now successful; plugin connection no longer fails.

Bursts

1. Empty Dataset Reports are no longer sent to Users who are not in User Maps.
2. Removing a Group of Users from a Burst now unsubscribes these Users from the Burst.

Dimensions

1. Display Values are no longer sent to the server instead of Key Values in an External Report.

Folders

1. Tile order in Folders is now preserved in the "Show All" display mode.

Datasets

1. Speed issue resolved for Dataset Change Views and Reports.

Reports

1. External content embedded in a Report is now displayed as expected.