

Certification Levels for Elements (6.3.1)



For versions prior to 6.3.1, see [Certifying an Element \(prior versions\)](#)

Version 6.3.1 introduces a more granular method for certifying elements by creating various Levels of Certification.

This article covers:

1. [Certification without Levels](#)
2. [Default Certification Levels](#)
3. [Add a New Certification Level](#)
4. [Setting the Certification Level on Elements](#)
5. [Objects that Allow Setting Levels of Certification](#)
6. [Where Certification Levels are Displayed](#)
7. [Where Certification Levels are available for Filtering](#)

NOTE:

- Certification Levels only apply to Elements
- Datasets, User Maps, and Data Sources still use the older "Yes/No" settings: see [Certifying Objects Other Than Elements](#)

1. Certification without Levels (prior to 6.3.1)

The screenshot shows the 'Metrics / Daily Sales(dimensioned by Country)' configuration page. The 'Info' tab is selected. The configuration includes fields for 'Measured' (Daily), 'Dimension it by' (Country), 'Collecting is' (enabled), 'Visible' (on Homepage, in Search), 'Name' (Daily Sales), 'Description' (Daily Sales for a Country Metric), 'Category' (Sales & Marketing), and 'Certified' status (Yes). A black arrow points to the 'Certified' status field.

The option to select Status of Certified (Yes) or Uncertified (No) has been supported since Release 5, but this function has been expanded in Release 6.3.1 to allow various Levels of Certification.

2. Activate Certification Levels (new in 6.3.1)

Note that you can Add/Change the Certification Levels prior to Activation (Steps 3 & 4)

Admin -> System -> Variables

Variables

Search

1

2

3

4

5

WARNING: Do not make arbitrary changes. Contact support@metricinsights.com for assistance.

All

cert

Variable Name	Assigned Value	Valid Values	Description
ENABLE_CERTIFICATION_FILTERING	N	Y,N	Determines whether Certification is inclu...
ENABLE_CERTIFICATION_LEVELS	N	Y,N	Instead of basic Certified = Y/N, enable ...
MARK_UNCERTIFIED_ELEMENTS	N	Y,N	Obsolete. Do not use.

Discard Changes

Commit Changes

1. Enter "**cert**" in the Search field to limit choices
2. Set **ENABLE_CERTIFICATION_FILTERING** to "Y" to allow filtering on the Homepage by Certification Level
3. Set **ENABLE_CERTIFICATION_LEVELS** to "Y" to enable the Levels option
4. **MARK_UNCERTIFIED_ELEMENTS** is no longer supported
5. [Commit Changes] and your new Levels will be applied

NOTE: All elements that were previously set to Certify = "Y" will now be set to the Level designated as Default.

3. View Default Certification Levels

Admin menu > System > Certification Setup

Certification Level

Search

1

2

3

4

Certification Levels can be enabled via the ENABLE_CERTIFICATION_LEVELS System Variable

Certification

Autosync

Name	Description	Color
Bronze		✓ #cd7f32
Silver		✓ #c0c0c0
Gold		✓ #d4af37

+ New Certification Level

Initially, your system will be set up with three Levels, but you can change any of these or add New Certification Levels.


1. Message showing how to enable Certification Levels if they are currently Disabled
2. Three Levels are installed with Release 6.3.1. **Bronze** is the lowest level and **Gold** is the highest
3. You can modify any of the existing Levels, or delete any Level except the one designated as Default.
4. Select **[+ New Certification Level]** to open the Add popup

4. Add a New Certification Level

Add Certification Level [X]

1 Name

2 Description

3 Color ☒ 

4 Is default? ☒

or

1. Input a **Name** that is meaningful to your organization
2. Optionally, add a **Description**
3. Pick a **Color** by clicking a square on the color chart
4. Indicate if this Level is the **Default**. There can only be one Default Level. When Certification Levels are activated, all "yes" certifications will be reset to this Level

[Save]

5. Setting the Certification Level on an Element Editor

Content > Elements > Edit any element > Info tab (our example is an External Report)

External Reports / Daily Profit by Country

Search + New...

Info Configuration Associations Advanced Documents Engagement History

☐ Include External Report in next [scheduled migration](#)

Name: Daily Profit by Country

Description: Daily Profit by Country

☐ Apply Markdown to description 2500 character maximum

Collecting is: ☒ enabled ☐ disabled

Visible: ☒ on Homepage ☒ in Search

Dimensioned by: Not Dimensioned

Category: Sales & Marketing

1 Certified: ☒ Yes ☐ No
Choose "no" to change status to "Uncertified"

2 Certification Levels: Development Certified

Tags: Development Certified, Bronze, Silver, Gold

1. Set **Certified** to "Yes"
2. **Certification Levels** will display the Default Level
3. You can choose any Level using the drop-down

6. Objects that Allow Setting Levels of Certification

1. **Elements:** Certification is set on their Editors > **Info** tab as shown above
2. **Workflows:** Certification for elements can be set when editing any Stage

Publishing Workflows / Financial Reporting Search + New...

Elements

Workflow Stages

Name	Type
Initial Review (default)	New
Developer Review	In Progress
Business Review	In Progress
Published & Certified	Completed
Archived	In Progress

[New Publishing Workflow Stage](#)

Workflow Categories

Finance_Staging

[Add Staging Category](#)

Workflow Staging Categories

Edit Stage

Stage Name:

Stage Description:

2500 character maximum

Type:

Element Fields involved in this Stage: Required

- ☐ Name
- ☐ Description
- ☐ Category
- ☐ Folder
- ☐ Tags
- ☐ Documents
- ☐ Owners
- ☒ Certification set to
- ☐ Homepage Visibility
- ☐ Search Visibility

1. On any Stage Editor, check **Certification**
2. Choose either **Automatically** or **by User** from dropdown
3. Select either **not certified** or any existing **Certification Level**

7. Where the Certification Level is Displayed

7.1. Homepage tiles

Catalog How-to Guide Search + New... Content Admin Anna

METRIC INSIGHTS

Group by Folders

Most Popular

1. ☒ **Development Certified Certified** by [Anna Kennedy](#) on 10/13/2021

2. ☒ **Development Certified Certified** by [Anna Kennedy](#) on 10/13/2021

Thursday 07/15/2021

\$8,227,050, up 1.8% from yesterday

Daily Sales for a Country Metric

Business: [Grayson Stebbins](#)

Technical: [Grayson Stebbins](#)

Data Source: Dataset

Last updated: Oct 18, 2021 3:17

Engagement: 3

1. Tiles on the Homepage will display **Alert Levels** if assigned

[Previous](#)
[Next preview](#)

All Countries | Daily Sales (Tableau)

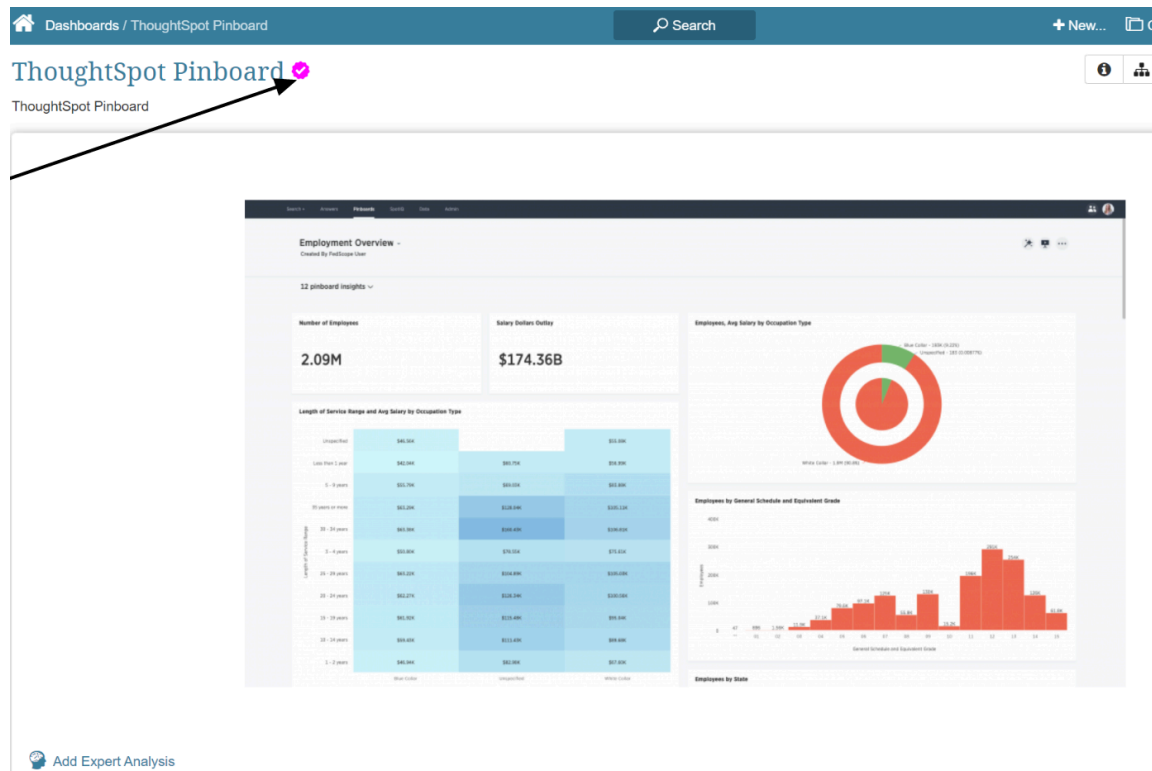
[4w](#)
[2m](#)
[12w](#)
[1y](#)

Anna Kennedy on 10/13/2021

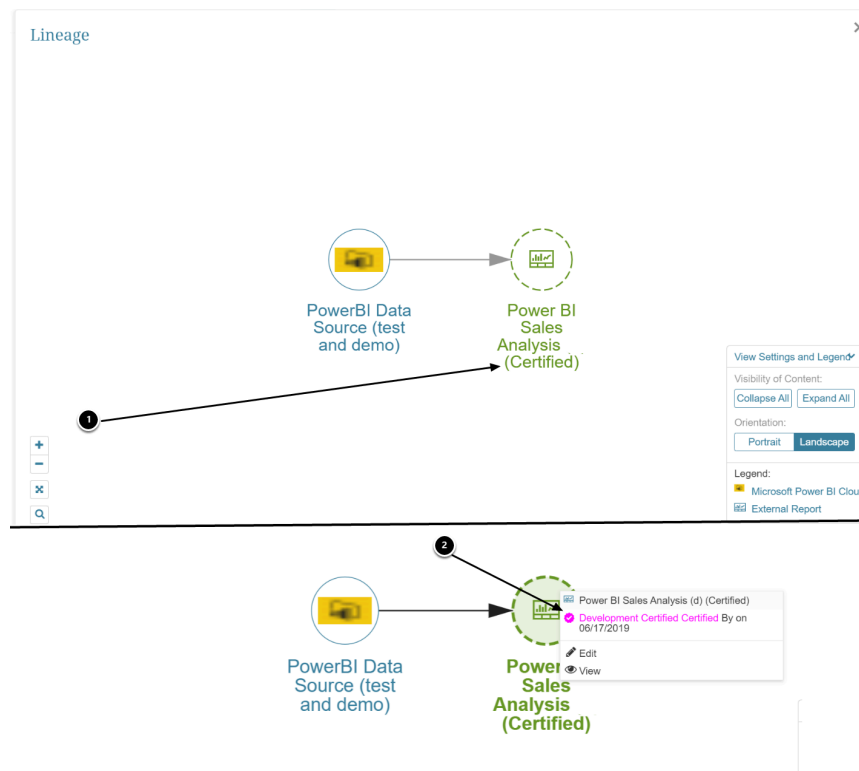
Current value	\$8,170,820 Monday 08/13/2018
% Change	Down 4.2% from yesterday
30 Day Avg	\$8,200,060
Minimum ever	\$4,409,528 Wednesday 01/10/2018
Maximum ever	\$8,529,626 Sunday 08/12/2018
Tags	sales tableau
Business Owner	Grayson Stebbins
Technical Owner	Grayson Stebbins
Element ID	10
Last updated	Sep 24, 2021 20:33
Engagement	5

All Countries | Daily Sales (Tableau)

7.3. Element Viewers



7.4. Lineage Diagrams



1. Note that the color of "Certified" does not indicate the Level of Certification
2. Clicking on the **element icon** will display more Certification information with correct coloring

8. Where Certification Levels are available for Filtering

8.1. Homepage Filter

The screenshot shows the Metric Insights homepage. A dropdown menu is open for the 'No Filter' button, showing the following options: Certified, Gold, Development, Certified, and Uncertified. The 'Certification' dropdown is highlighted with a yellow background. The homepage displays several dashboards, including 'All Countries | Daily Sales', 'All Countries | Sales (SQL)', 'Canada | Daily Sales', and 'Mexico Regional Procurement Dashboard'. The 'All Countries | Daily Sales' dashboard shows a line chart with a value of \$8,227,050, a 1.8% increase compared to yesterday, and a date of Thursday 07/15/2021. The 'All Countries | Sales (SQL)' dashboard shows a line chart with a value of \$19,025,884, a 4.2% decrease compared to yesterday, and a date of Saturday 10/16/2021. The 'Canada | Daily Sales' dashboard shows a line chart with a value of \$1,266,080, a 3.0% increase compared to yesterday, and a date of Thursday 07/15/2021. The 'Mexico Regional Procurement Dashboard' shows a line chart with a value of \$8,170,820, a 4.2% decrease compared to yesterday, and a date of Thursday 07/15/2021.

8.2. Global Search

The screenshot shows the Metric Insights Global Search page. The search bar contains the text 'daily sales'. Below the search bar, there are filters for 'Owner', 'Tag', and 'Category'. A toggle switch for 'Certified only' is highlighted with a red circle and the number 1. The search results are displayed in a grid format. The first result is 'Daily Sales Spotfire', which is a 'Certified' element by Anna Kennedy on 10/13/2021. The second result is 'Canada | Daily Sales', which is a 'Certified' element by MetricInsights on 4/11/2019. The search results are filtered by 'Certified only'.

1. Activating the **Certified only** toggle will allow filtering by **All** or any one of the defined Levels

8.3. Elements List

Elements

Search

+ New... Content Admin

Find by Name or Type

Tag:

Category:

Dimension:

Data Collection Trigger:

Enabled:

Hidden?

Error

Type:

External Report Type:

Data Source:

Certification Levels:

Created by:

Owner:

Clear All

Elements

Disabled Element

Name	ID	Type	Fetch Method	Dimensioned by	Category	Enabled	Modified	Engagement	View
Regional Procurement ...	1405	External ...	Plug-in	Country/Re...	Dashboard	Y	2021-10-18 21:2...	30	View
Daily Sales (SQL) (dim...	1200	Metric	SQL	Country	Demo Elements	Y	2021-10-18 21:2...	7	View
New Sales Report	1940	External ...	Plug-in		Uncategorized	Y	2021-10-18 20:3...	1	View
Global Analytics Dashboard	1760	External	Plug-in		Global Analytics	Y	2021-10-18 15:15...	0	View