Release Notes

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1. 2020 Releases

1.1 Release 6.1.0/6.1.1/6.1.2/6.1.3

The 6.x versions of Metric Insights represent a new era of modern container-based deployment (allowing for horizontal scaling of specific services), support for significantly larger Datasets via Microsoft SQL Server (the metadata/application DB will remain in MySQL/MariaDB), and the introduction of the Data Processor and Remote Data Processor services (deployed as containers).

6.1.x introduces improved column change management for Datasets, and several new features to assist with multi-tenant enterprise-scale deployments (new privileges, new options for content migration). We're excited to welcome you to this new era.

6.1.1 marks the official end-of-life for creating new Legacy Reports. Existing Reports will continue to function, but you can no longer create new Legacy Reports. This is the next step in the eventual full retirement of Legacy Reports

6.1.2 moves Global Search into Beta; it also brings a suite of new features for troubleshooting Notifications Schedules and Bursts, expands options for Alerting, extends our API in significant ways, adds workflow improvements to Dataset Reports, and introduces support for MicroStrategy Dossiers.

6.1.3 includes many enhancements for administrators, specifically around Bursting and overall system monitoring. Power Users may find our new Burst tracking useful, and content creators might notice the absense of our SQL Query Builder—we considered it a legacy component and removed it entirely, instead displaying available table names to the right of the fetch command.

Release highlights:

1. Docker-based deployment (originally introduced in 6.0)
2. Container orchestration (including templates for Kubernetes and Amazon ECS)
3. Rearchitected Data Processor (originally introduced in 6.0) and Remote Data Processor (replacing the Remote Data Collector)
4. High-volume data loading via MS SQL Server Agent
5. Smarter Dataset column management
6. Easier scripted content migration
7. New Power User Privileges and Permissions for JS and Email Templates
8. [6.1.1] Dataset Reports: Formula-based Variables in Text Blocks
9. [6.1.1] Dataset Reports: Line/bar charts can now be driven from Snapshot Date
10. [6.1.1] Portal Page Asset Folders have been introduced for improved Asset management
11. [6.1.1] Improved Custom PowerPoint Templates

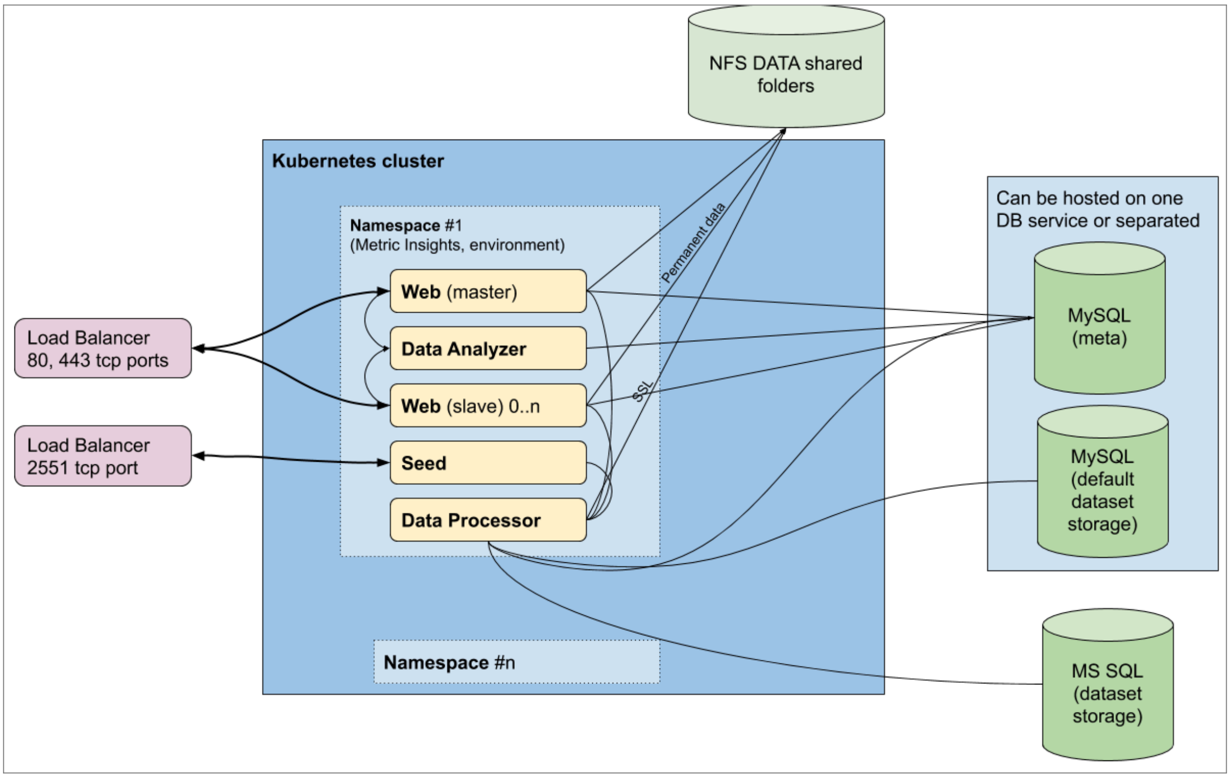
Major Features

1. Docker: Deployment & Orchestration

The 6.x architecture is built from the ground up to be deployed in Docker with container orchestration. 6.1.x ships with configurations for Kubernetes and ECS.

For help configuring your infrastructure-as-code tooling (e.g. Terraform, CloudFormation), contact support@metricinsights.com

1.1. Container Orchestration Options



All of the following deployment options are supported:

1. Custom Kubernetes (in-house / corporate data center deployment)
2. Azure Kubernetes Service
3. Amazon EKS
4. Amazon ECS
5. Docker Swarm

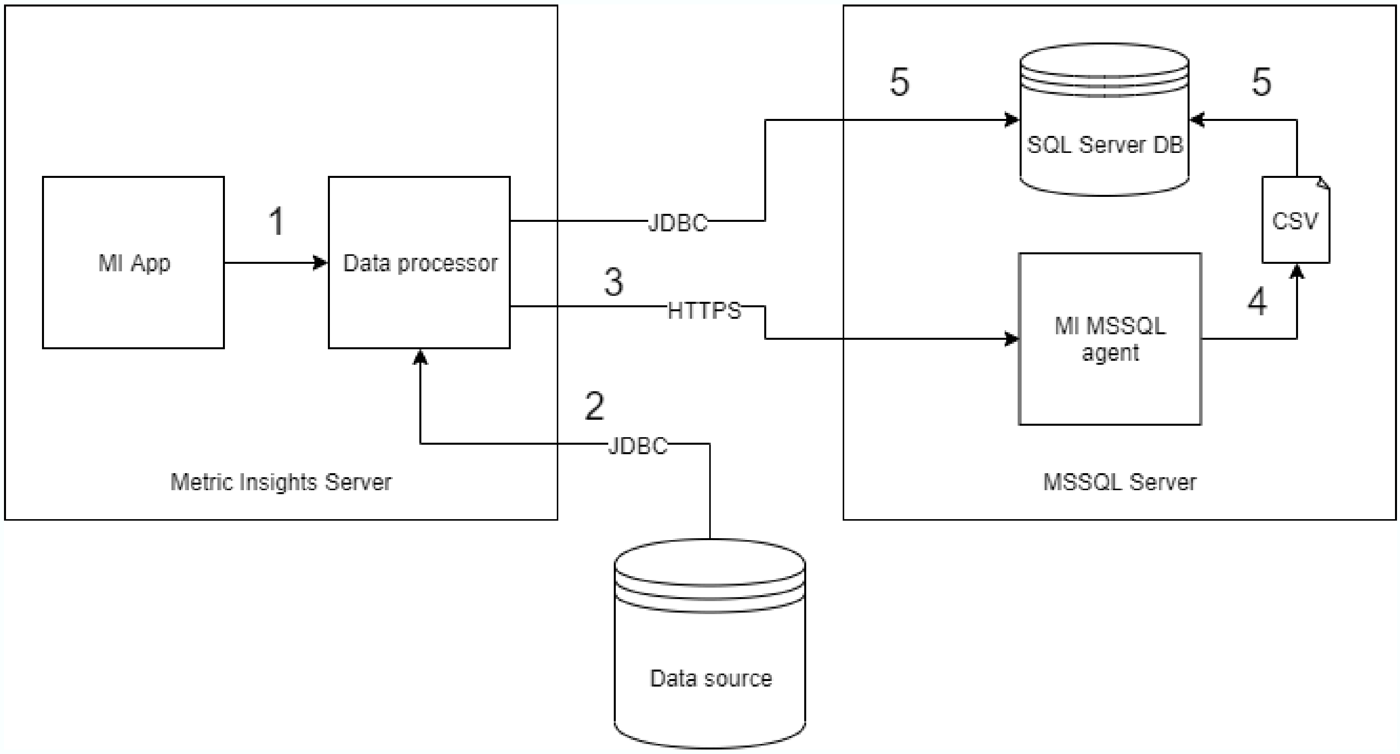
Learn about the new install and deployment process via MI app deployment in a Kubernetes cluster (6.1.0)

1.2. Other Deployment Options

Network File Systems (NFS) are now a requirement for permanent storage in the 6.x architecture. In 6.1.0, we ship with configurations for the Kubernetes-focused Portworx storage and data management tool as an additional option.

2. High-Volume Data Loading

Larger Datasets with volumes in the tens of millions of rows (depending on the number of columns and the performance of your database instance/cluster) are supported via Microsoft SQL Server as of 6.0—in 6.1.0, we've introduced two methods of loading CSV data, either via a Shared Mount on the server, or an agent, for performant data loading into the SQL Server database.



There are two data upload options:

1. Create a local folder on Microsoft SQL Server where CSV file is stored and bind it with the "/opt/dp" folder which is located in Data Processor's Docker container.

2. Create a Shared Folder that can be access by the Metric Insights Storage Engine.

The agent must be deployed in the Microsoft SQL Server environment in order to load large volumes of data. This means you will need SQL Server on a virtual or a baremetal machine where the agent can be deployed.

Please contact **support@metricinsights.com** if you plan to load high volumes of data into Microsoft SQL Server and we can assist in the process.

3. Smarter Dataset Column Management

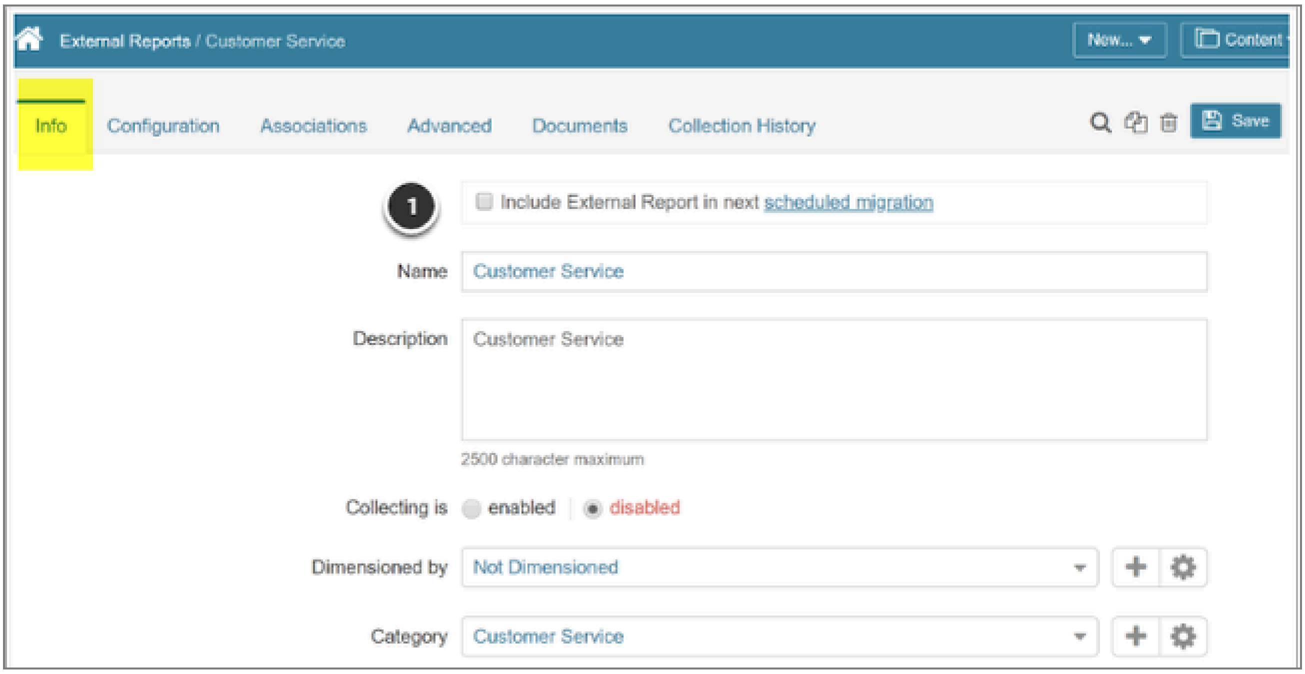
If a column is not being used in a Dataset, it can now be removed without causing any downstream issues.

If a column is being used in a meaningful way in any downstream object, you will be explicitly warned about the downstream objects impacted while doing things like editing a Dataset View.

4. Easier Scripted Content Migration

Building on Scripted Content Migration introduced in 5.6.1, the 6.1.0 release introduces the ability for content creators to select the content they would like to migrate ***on their own.***

Ensure that the config variable DISPLAY_MIGRATION_OPTIONS is set to Y (the default is N)



1. In the Element (or Category) Editor, select the "Include External Report..." option
2. Wait until the next Scheduled Migration runs (this will depend on the script's schedule)

Release 6.1.1 introduces support for Portal Page migration via the same method.

For further details, explore [Scripted Migration via Category and Element Editors]

For assistance, contact **support@metricinsights.com**

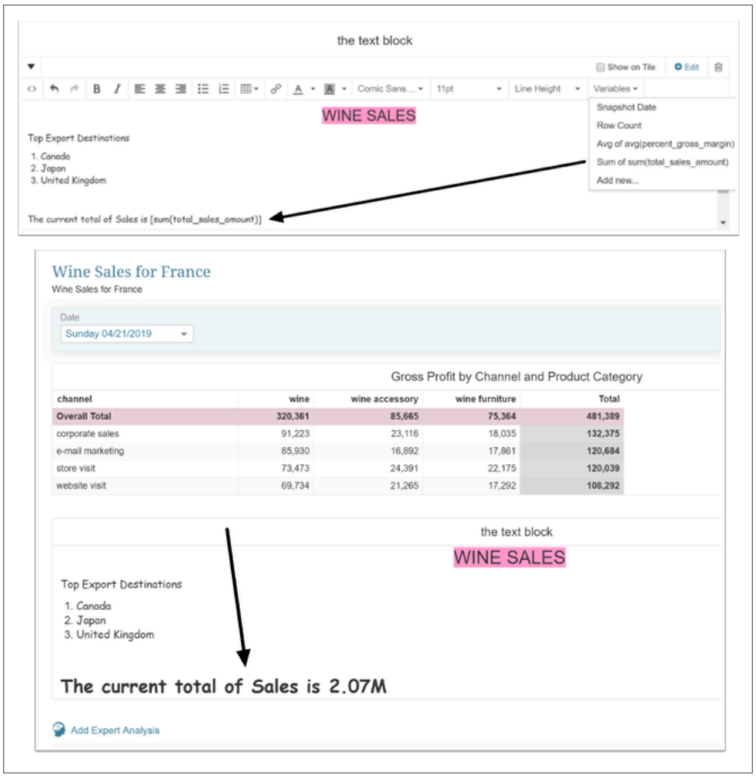
5. Power User Privileges & Permissions for JavaScript Chart Templates, Email Templates, Alert Workflows, Announcements

In support of multi-tenant deployments that require Admin-like Power Users, we've rounded out some of the final remaining areas wherein Power Users could not previously administer the system.

In 6.1.0, we now provide Edit Access Privileges to Power Users and allow them to grant Permissions for:

1. JavaScript Chart Templates
2. Email Templates
3. [6.1.1] Alert Workflows

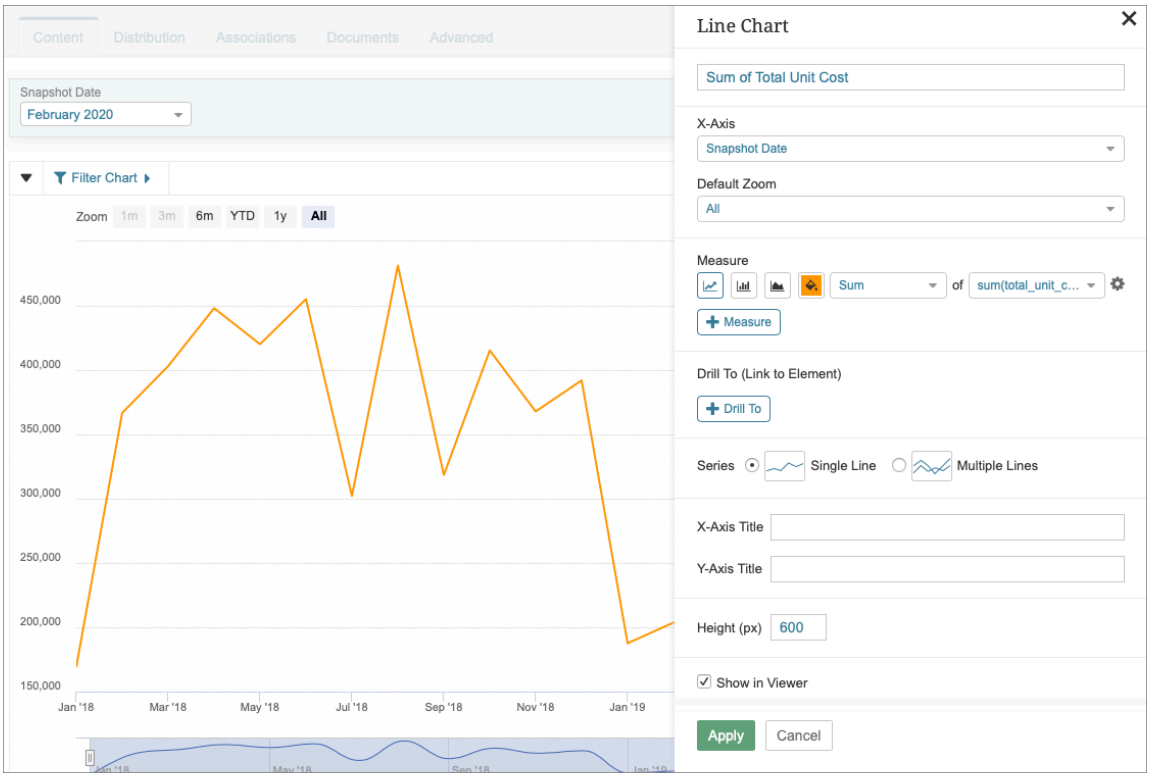
6. [6.1.1] Dataset Reports: Formula-based Variables in Text Blocks



Users can now build formulas that are calculated based on the column data in a Dataset Report, and display these as Variables that can be included in the Text Block component.

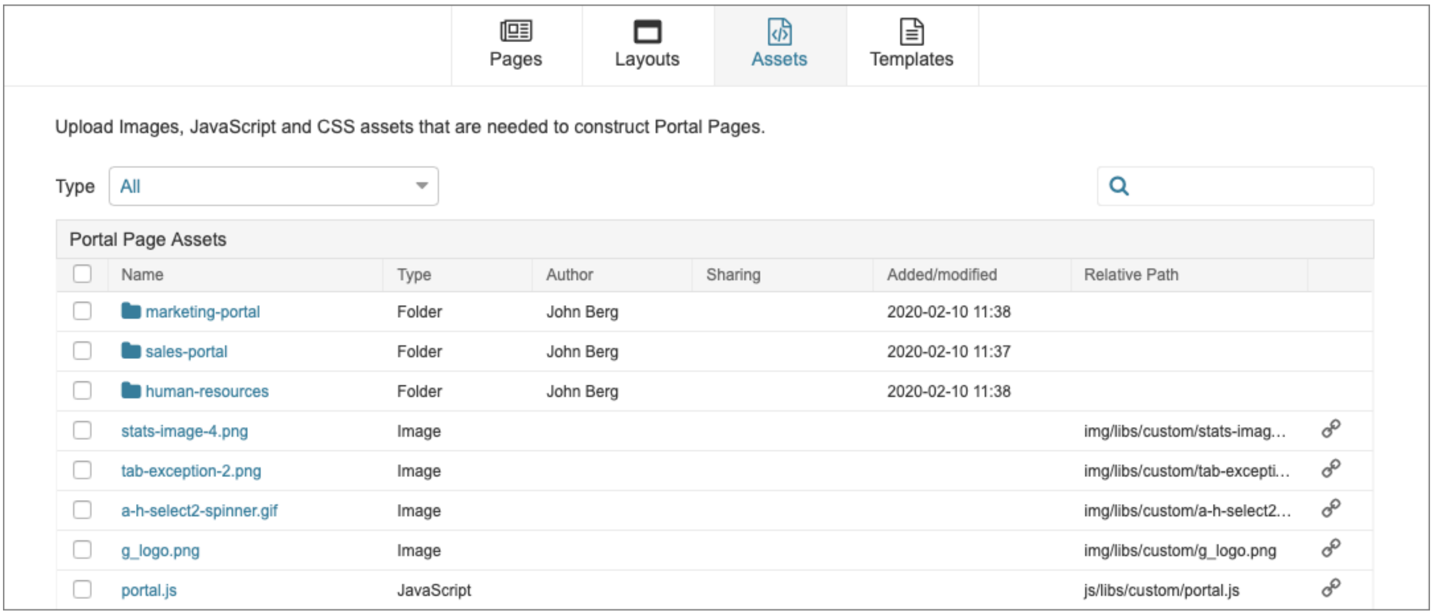
For details see, [Adding Variables and Formulas](#).

7. [6.1.1] Dataset Reports: Line/Bar/Area charts can now be driven from Snapshot Date



When using a Snapshot Dataset as the source for a Dataset Report, you may now select Snapshot Date as the value source for the X-axis in the Line/Bar/Area chart component.

8. [6.1.1] Portal Page Asset Folders

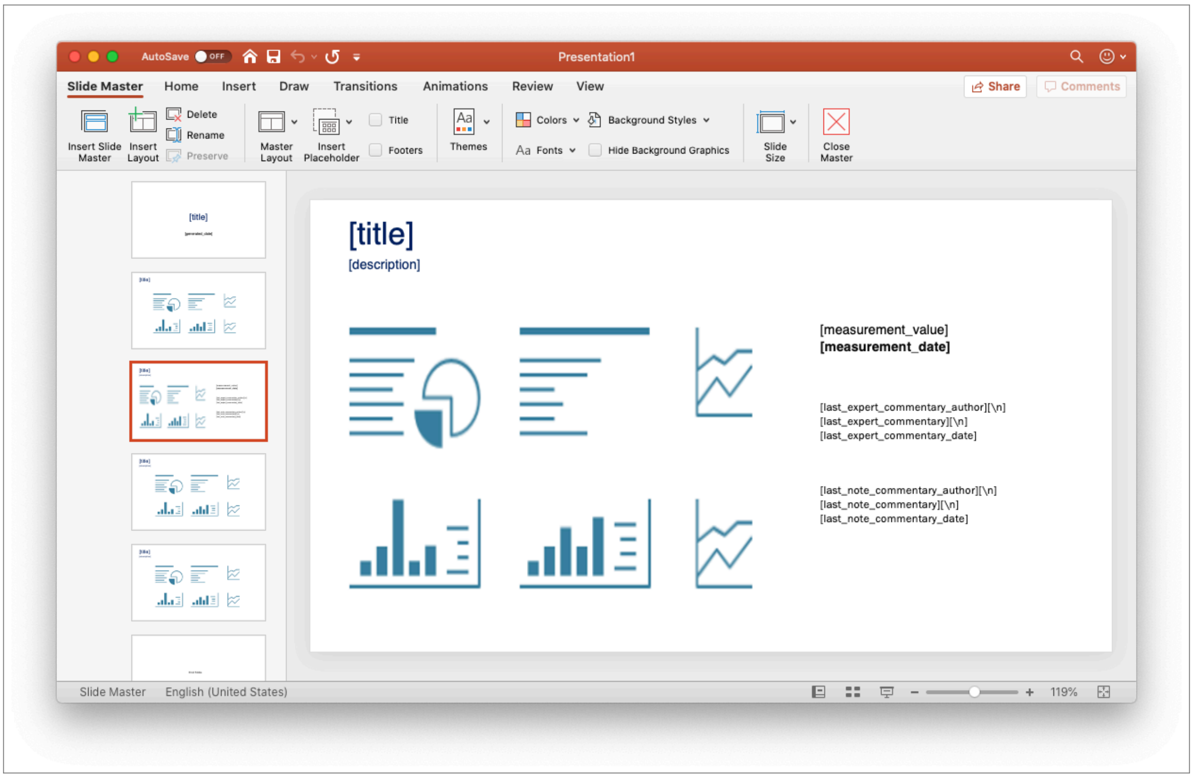


We have introduced Asset Folders to ease the management of the Assets utilized in the construction of Portal Pages. These can be shared explicitly with Users or Groups intended to manage a particular Portal Page. To review associated Security changes, see [Portal Page Security]

Files can be uploaded individually as ZIP archives.

Release 6.1.2 will introduce nested Asset Folders that will support multiple levels of hierarchy (e.g: Parent Folder, Child Folder, Grandchild Folder, and so on)

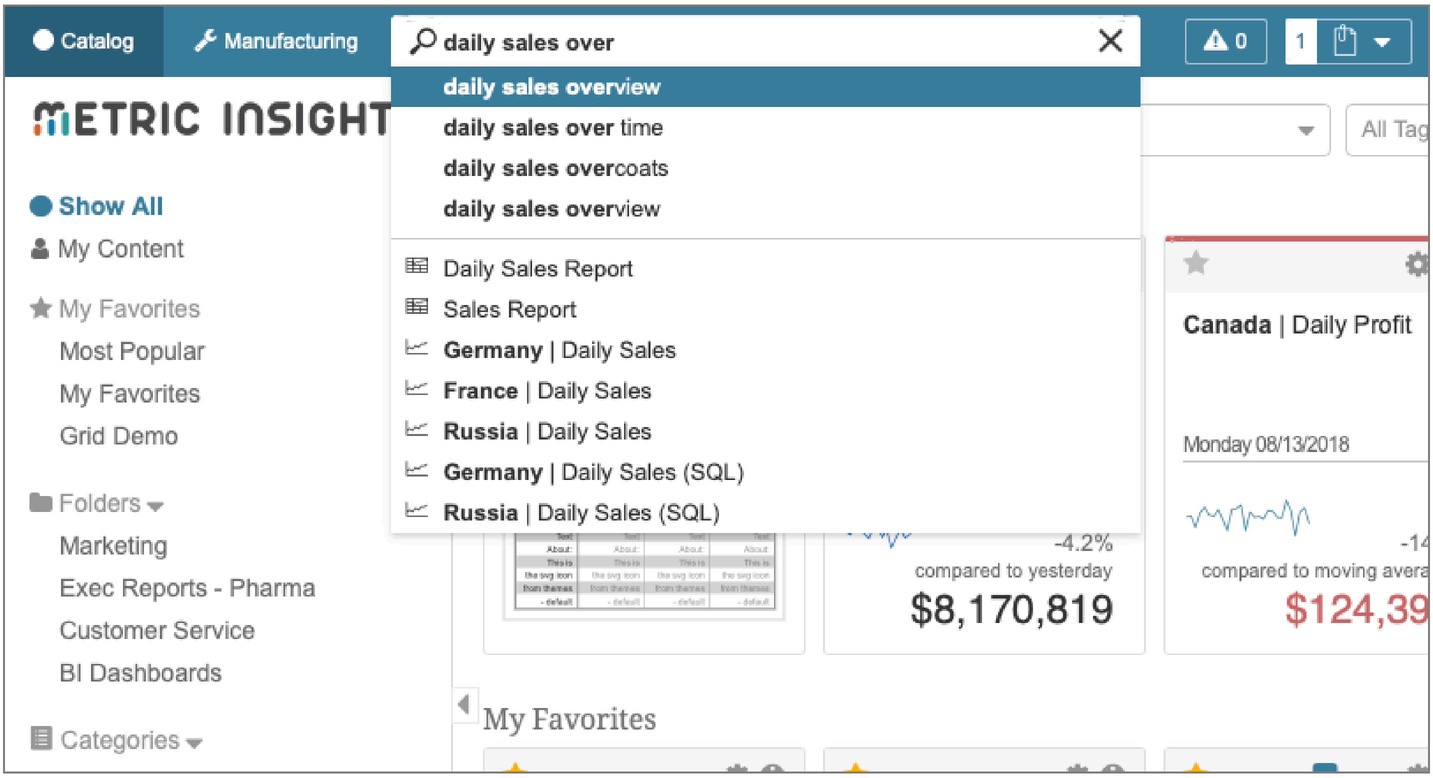
9. [6.1.1] Custom PowerPoint Templates



We have completely rearchitected our support for custom PowerPoint templates. The functionality has been simplified to a common set of variables that can be included in a POTX. Once setup in PowerPoint, the template is uploaded to Metric Insights. The template can then be selected when setting up a **Burst** or **Favorites Folder** and the PPTX that is subsequently generated will honor the custom template.

[Learn more about Custom PowerPoint Templates]

10. [6.1.1 and 6.1.2] Global Search (Beta preview)



Global Search allows for search across the majority of Metric Insights content, including Elements, Datasets, Bursts, as well as the content of extracts from external systems (via specified Datasets). We will be adding support for Portal Pages in a future minor release. We are also considering expanding this to Admin-focused objects like Notification Schedules, Data Collection Triggers, and the many other building blocks and objects that exist within the platform.

1. You can turn on search via the ENABLE_GLOBAL_SEARCH Config Variable
2. Search will only be enabled for Power Users and Admins
3. The functionality requires MySQL v5.6+

While still an Alpha (early preview with limited testing), the functionality provides a great example of what's to come to all Metric Insights users in Release 6.2

Please provide any feedback you have about search to product@metricinsights.com

11. [6.1.1] Monitoring Tool for System Admins

The new service-based architecture of Metric Insights, wherein multiple services run in parallel (each providing a specific set of functionality), requires a new approach to monitoring. We've introduced a tool for monitoring the health of all services necessary for operating the platform.

A hostname and credentials for accessing the Monitoring Tool are defined when setting up Metric Insights.

12. [6.1.2] Dataset Reports: Easily hide and unhide columns

Hiding and unhiding all or some columns in a table is now as easy as selecting checkboxes.

13. [6.1.2] Dataset Reports: Tables contains no rows

There are many scenarios in which an empty report is just as valuable is a report with data because you need to know that there are no exceptions for that day. We've extended our "no rows" functionality to allow for a custom message, for example: "There are no exceptions for today."

14. [6.1.2] Metrics: Support for higher volumes of data points

Data points on a Metric are now lazy loaded, supporting far higher volumes of points overall. This is helpful for hourly Metrics with a lot of history.

15. [6.1.2] Alerting Enhancements

1. An "Alert Window" override exists on Metrics, instead of just Measurement Intervals
2. You may now choose to "Always match payload measurement date to alert"

16. [6.1.2] Notification Schedule & Burst Troubleshooting

1. The Notification Schedule owner can choose to receive an error report via email if the Notification Schedule run is automatically aborted/timed out
2. Error reports can now be sent to multiple email addresses (separate by comma)
3. It is now possible to abort a Notification Schedule run

17. [6.1.2] Plugin Enhancements

1. **MicroStrategy Dossiers** are now supported and are the preferred Filter/Prompt in MicroStrategy
2. **Qlik Sense** support for formula-based filters

18. [6.1.2] API Enhancements

1. Several new endpoints for **Bursts**:
    1. Create Burst
    2. Assign to Notification Schedule to Burst
    3. Add content to a Burst
    4. Assign ownership (for example, set current user as Burst owner)
2. New endpoint for getting a list of all Plugin Connection Profiles
3. New endpoint for getting a list of all available Notification Schedules

19. [6.1.3] Burst, Notification Schedule and Data Collection Trigger Troubleshooting

Bursts and Notification Schedules now have more robust logging and greater detail exposed about each Burst (its contents) and each Notification Schedule run.

20. [6.1.3] Burst Link Tracking

Burst creators now how the option to track links clicked within a Burst. Thes new capabilities are available on the Customize tab in the Burst Editor.

21. [6.1.3] Status Monitor Updates

The Status Monitor has been updated to include a new overview design that includes Mounted Volumes and a new Nodes tab for monitoring the individual nodes that together make up a complete deployment. Learn more about the Status Monitor.

22. [6.1.3] Security Model Changes

1. We now only allow Power Users to share Folders on Homepage with Groups of which the Power User is a Member or Owner, and to Users who are members of these Groups
2. New **Privilege** added: Allow Power User to subscribe or grant Burst Access to any User or Group

23. Other Changes

1. **Portal Pages** can now utilize a JavaScript API for storage**,** allowing developers to manage the state of JavaScript objects. Explore examples via [How can I store data in JavaScript?](#)
2. **Alert Simulation** no longer applies the Alert window to the simulation—this should remove any confusion when setting up an Alert.
3. **Data Storage** changes can be tracked for auditing purposes. When Admins and Power Users with Edit Access use the Data Storage editor (for editing Data Storage integrations like Microsoft SQL Server), all meaningful changes are tracked.
4. **Dataset Validation** can now be limited to a maximum number of rows during the data load process via the DATASET_VALIDATION_MAX_ROWS Config Variable.
5. **[Content Discoverability](#)** functionality introduced in 5.6.1 can now be set as the default via the NEW_CONTENT_IS_DISCOVERABLE Config Variable.
6. **Access Request** emails are now prettier (these are received by admins when an end-user requests access to content)
7. [6.1.1] **Data Storage** functionality now includes automated Health Checks to ensure that a Storage Engine always has capacity available
8. [6.1.1] **Jira Plugin**'s Visual Editor now supports "In List"
9. [6.1.1] [Empty **Dataset Reports** can be included in distributions](#)
10. [6.1.1] **Legacy Reports** can no longer be created
11. [6.1.1] **Portal Pages** now honor security restrictions on User Mapped content
12. [6.1.1] [Ability to omit/hide FIlters from External Reports](#)
13. [6.1.1] **External Report Types** now offer the ability to suppress the Notifications icon on the External Report Viewer (across every Report with that Type)
14. [6.1.1] **Element Tile Previews** now display Expert Analysis in the summary information
15. [6.1.1] **Data Collection Trigger** runs now count Datasets and User Maps (previously, they were excluded from the metadata, although the did run with the Trigger)
16. [6.1.2] **Datasets** that have been disabled because of broken dependencies will now auto-enable (but only in situation where they were automatically disabled)
17. [6.1.2] **Datasets** now support custom Measurement Time Calculation Commands. This will enable custom measurement times beyond today and yesterday, for example: 2 days ago
18. [6.1.2] **Dataset Reports** Fix: Duplicating a report will now copy Filters and preserve formatting
19. [6.1.2] **Portal Pages** now allow for usage of our External Reference Hierarchy control—this will allow for the selection of a specific object in a BI tool (like a Tableau Worksheet)
20. [6.1.2] **Bursts** are now listed with special colors based on their status.
21. [6.1.2] **External Report Templates** have been introduced so that you can programmatically build new External Reports based on a template.
22. [6.1.2] **External Report Types** have an updated setting called "Allow iframe Embedding". This is a simple label change to make it more clear what the setting does: allow the External Report builder the option to embed a report via iframe, instead of just grab static images (previously it was "Allow Embedding of Live Visualization")
23. [6.1.2] **Homepage Tile Rebuild** is a new option is present for admins who need to rebuild all tiles on the homepage. Admin > Utilities > Rebuild Homepage Tiles. This is usually done when major security/access changes have been made and tiles are no longer accurate.

24. [6.1.3] **Datasets and Elements** no longer include SQL Query Builder—it was a legacy component that we have said goodbye to ?
25. [6.1.3] **Remote Data Processors** now have a more clear UI, we removed some legacy labels and cleaned up the list and the editor
26. [6.1.3] **Data Collection Triggers** now support entering multiple email addresses for error reports
27. [6.1.3] **Import/Export** will now include uploaded images when exporting External Content elements
28. [6.1.3] **External Reports** now support an "All" value
29. [6.1.3] **New User Defaults** now support the ability to select a Portal Page as the start location for a user
30. [6.1.3] **Data Collection Triggers** have an updated "Trigger Now" function that will display downstream dependencies
31. [6.1.3] **Access Requests** for content will now CC (send the same email to) the requesting User with each content access request (previously, they were only sent to Admins meant to handle requests)
32. [6.1.3] **Email Templates** have been removed: "Favorite" and "Favorite Simplified" are no longer included with the product
33. [6.1.3] **Dataset Views** now default to Public when they are created
34. [6.1.3] **Dimension** Value Key and Display columns are now the same by default
35. [6.1.3] **New Config Variable:** Ability to hide the "My Mobile" menu item for all users via DISPLAY_MENU_ITEM_FOR_MY_MOBILE

24. Installation, Configurations and DevOps

1. [6.1.2] We've added support for Red Hat EL / CentOS 8
2. [6.1.2] We now offer a Vagrantfile for CentOS 8
3. [6.1.2] We now support Docker Swarm
4. [6.1.2] The Installer will now allow you to set your desired timezone
5. [6.1.2] mi-db-move now supports Azure MySQL
6. [6.1.2] We've added AWS Cloudwatch logging into our Cloudformation deployment template (similar to the Terraform template that already existed)
7. [6.1.2] We will now stop an installation if Linux has a umask setting that is not the default
8. [6.1.2] We've added a *--db-name* option into the Installer what will allow adding a database prefix for the application
9. [6.1.3] We implemented some changes to prevent Slow HTTP Attacks against Apache
10. [6.1.3] We now provide the ability revoke the MYSQL_ROOT_USER (super user) access after installation
11. [6.1.3] We added more garbage collection for temp files in /opt/mi/iv/data/temp, including nb_* (no extension) files, files whose name consists of digits only (no extension), *.html, *.png, *.pdf, *.csv
12. [6.1.3] The Web and Data Processor containers now include the following system tools: ping, telnet, wget, vim, netstat
13. [6.1.3] We adjust the default memory allocation to the Data Processor
14. [6.1.3] Our Docker Swarm deployment manifest now accepts custom named NFS shared volumes (not just /opt/mi/data)

15. [6.1.3] Our Docker Swarm deployment manifest will now generate a 'credentials' folder with the necessary *.env files
16. [6.1.3] Portworx: If a custom class name is provided, we'll automatically comment out "kind: StorageClass" in our deployment manifest
17. [6.1.3] Credentials for the monitoring service have been added to insight.conf
18. [6.1.3] We'll now tell you if we can't find the Python interpreter
19. [6.1.3] We now support Amazon Linux 2
20. [6.1.3] mi-ldap-usersync now allows for mapping to Tableau Trust Auth users

1.2 Release 6.2.0

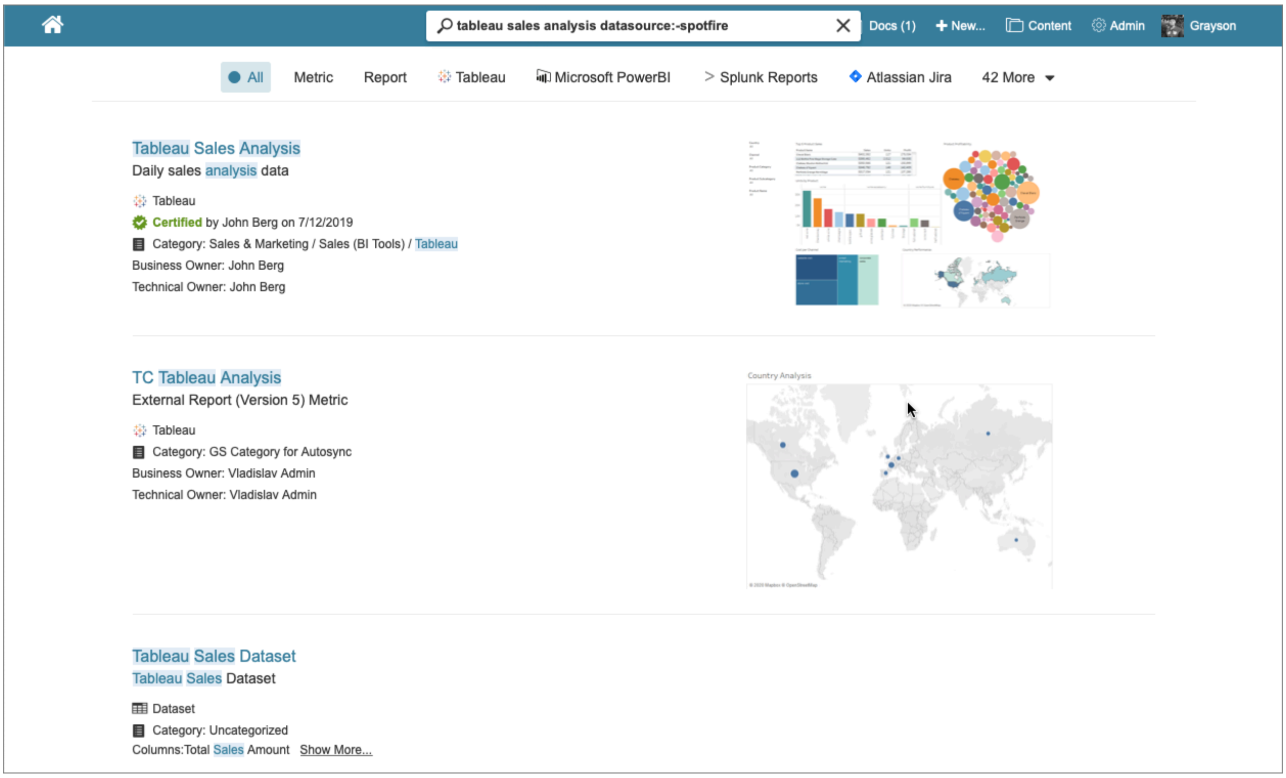
Release 6.2.0 is our second major release of 2020 and includes the launch of several new features that extend **Search**, **Reporting** and **System Administration** in exciting new ways. You can look forward to over 30 enhancements and dozens or minor improvements.

Under-the-hood architectural changes include replacing MariaDB 5.6 with **MySQL 8.** We've also introduced the Patcher, a utility designed to apply patches to multi-node, container orchestrated environments (a la ECS and Kubernetes).

Major features include:

1. Intelligent Global Search is now out of beta and ready for production
2. KPI Visualization provides a chart for highly dimensional data
3. Tableau Content Autosync will allow selected Folders in Tableau to automatically be synced with Metric Insights
4. Numerous Dataset Report Enhancements continue to round out our Reporting functionality
    1. Charting enhancements to line, bar, area, pie and bubble charts
    2. Other enhancements to tables, pivots and more
5. Design improvements to our user interface enhance the look and feel
6. User Maps can now include wildcards, supporting new ways of configuring mappings and providing access to all values within a certain column/field
7. Bursts, Triggers, etc
8. System Backups can now be setup and maintained directly in the application UI, without the need for a CLI tool
9. Several other improvements
10. Finally, there are some noteworthy changes to our security model

Intelligent Global Search



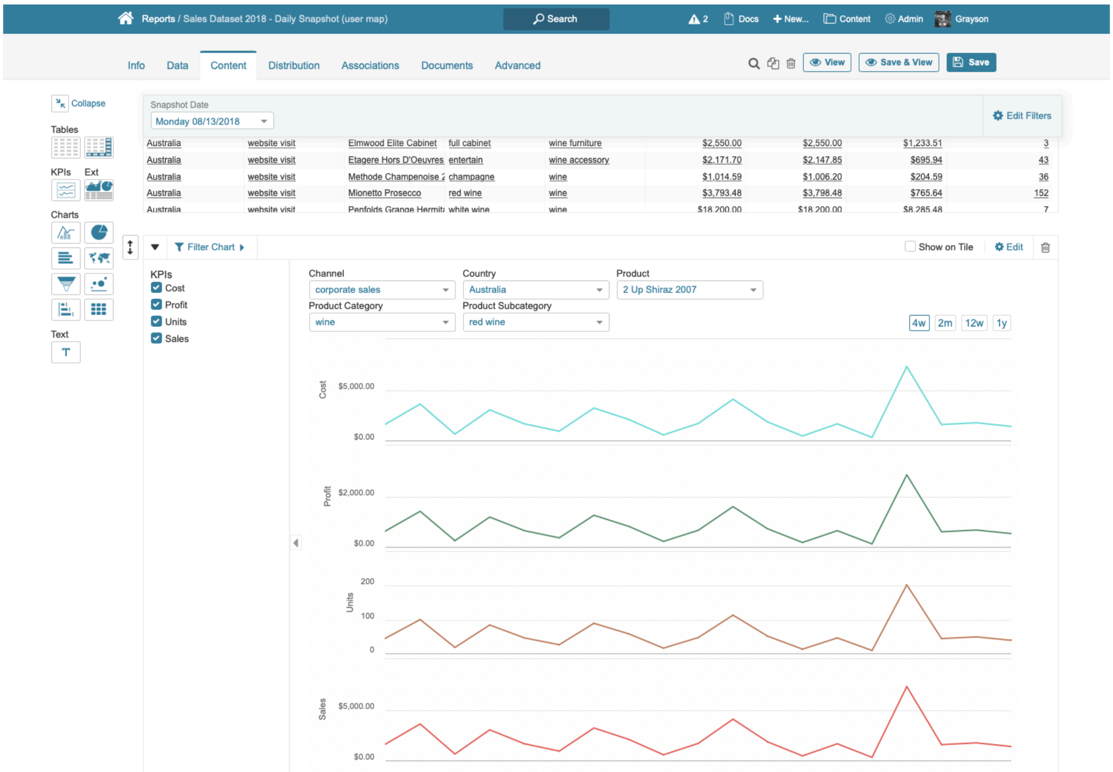
6.2.0 marks the launch of Intelligent Global Search—it has been designed from the ground-up to function like the leading search engines with core architectural similarities like crawling, indexing and scoring. You may search across both content within Metric Insights, external references to objects in BI tools, and Datasets that include links to any external system—you choose.

The engine includes its own query language that allows for a robust set of inline filters on metadata. In the example above, Tibco Spotfire Data Sources are being excluded via "datasource:-spotfire"

For all content in Metric Insights, we apply security/access rules so that users are only able to view what they have permissions to. For content from external systems, users will be governed by that system's security.

> Note for System Admins: Intelligent Global Search is made possible via the **data-analyzer**, an independent service that runs in its own lightweight Docker container.

KPI Visualization



The KPI Visualization provides an entirely new way to analyze dimensional data with a Dataset Report. You may now expand use-cases beyond the current two Dimension limit within Metrics as the KPI Visualization can handle several of each. In the example above, you see five Dimensions and 4 Measures (KPIs)

Tableau Content Autosync

Rejoice! Content can now be automatically synced between Tableau and Metric Insights. The sync is omnidirectional: content that exists within a Tableau Folder can be set to sync to a Metric Insights Category. As new Workbooks are added, Metric Insights will automatically create External Reports (based on Templates) of the same name. Learn more about Autosync with Tableau.

Dataset Report Charting Enhancements

Line, bar, area, pie and bubble charts have been improved to be more usable and and address a new set of use-cases.

Enhancements include:

1. Change segment colors for multi-series line, bar, and area charts as well as pie charts
2. Set the "top N" highest or lowest values for multiline chart or a pie chart

3. Sorting options for Bar Charts
4. Conditional coloring for bubble charts
5. For a Dataset Report that has a multiline datapoint on its chart, on hover, show the corresponding single value

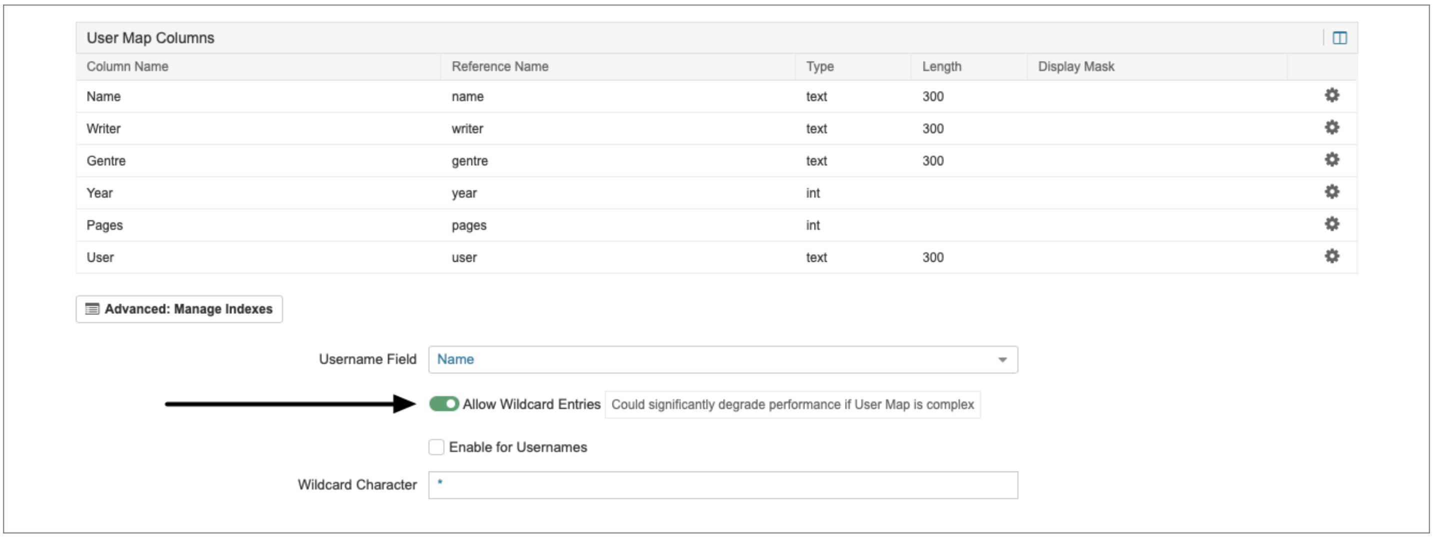
Other Dataset Report Enhancements

1. Add % of Total option for numerical columns in tables
2. Pivots: Validator for numeric data in Conditional Formatting rules
3. Allow Embedded External Report to be associated directly with Filters in a Dataset Report
4. Add conditional logic when downloading CSV (ignore Filters if possible)
5. Change "Show on Tiles" setting options ([MI-13460](MI-13460))

Design Enhancements

1. The action bar at the top of each page has been completely redesign to be more space efficient, elegant, and to accomodate search.
2. The "alert" icon has been updated to a bell, following the interface design pattern established in myriad other tools. Look out for the change in Element Viewers and Tile Previews specifically.
3. All buttons, dropdowns, radios, and checkboxes have been updated to be resolution independent and follow the color scheme of a particular theme (if you see custom branded colors in Metric Insights, you are using a theme). Button sizes and font sizes have been made more consistent. This is the first batch in a series of UI updates that will continue in 6.3.0

User Maps With Wildcards

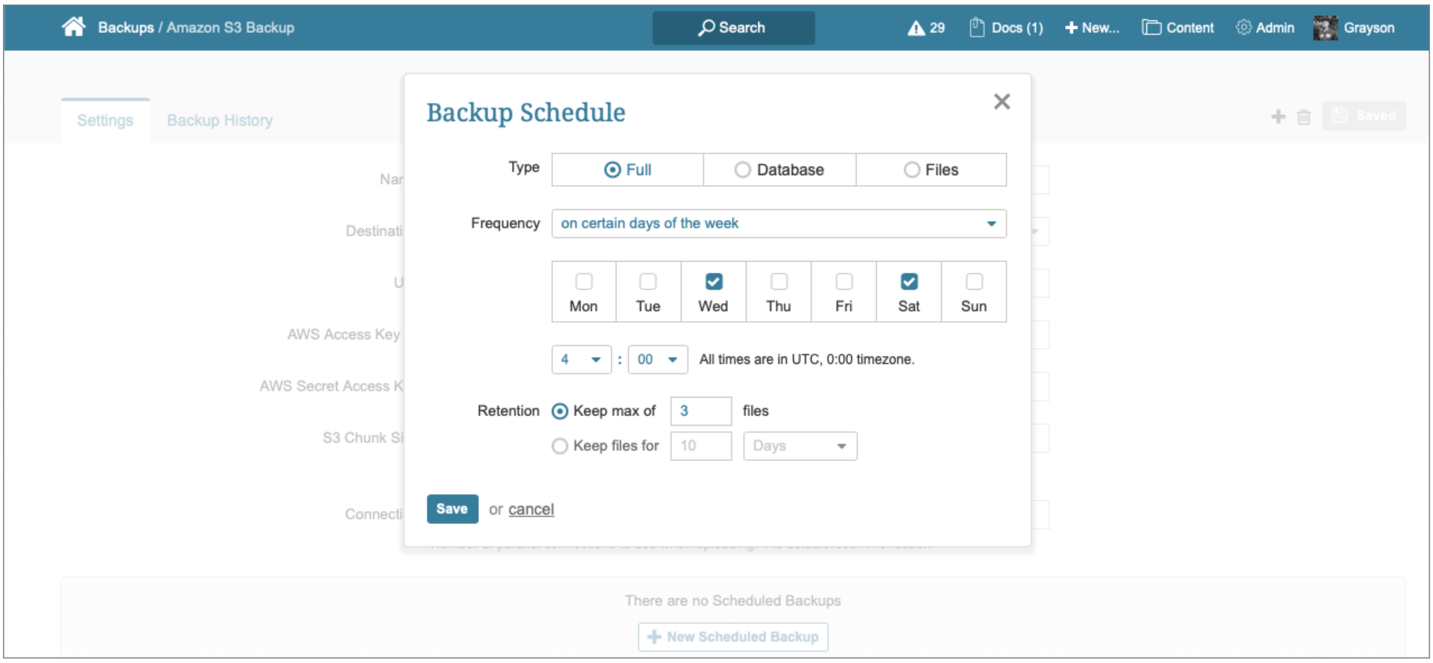


It is now possible to define wildcard values in User Maps, enabling some powerful now options for how mappings are setup.

Bursts, Notification Schedules, Data Collection Triggers

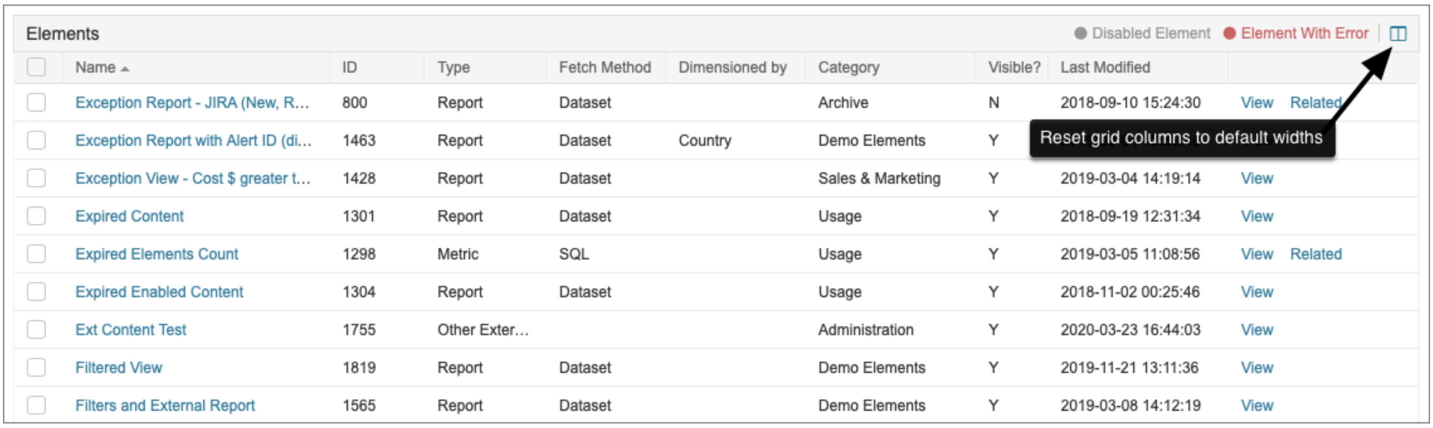
1. Data Collection Triggers' have been enhanced to include a new [Trigger Now] option for *Dimensions that were not successfully collected...*
2. Special characters are now allowed in Data Collection Trigger descriptions
3. Data Collection Trigger: Include Datasets in list of 'enabled elements' in

System Backup



Our ongoing efforts to move CLI-based utilities into the core application continue. Navigate to Admin > System > System Backups and try setting up a backup. All capabilities previously available in the *mi-app-backup* utility are now available in the UI—the utility remains, but there is no longer any need to run from a terminal. Everything can be configured in the UI.

Other Improvements



1. A column reset button now exists on all grids, clicking will reset each column to its default width
2. Datasets can new be modified en masse via a new Bulk Change capability (as has existed on Elements for years). The following can be changed:
   1. Enable/Disable
   2. Change Category
   3. Change Data Collection Trigger

3. Subfolders can now be copied
4. When saving things that make updates to the security model, inform user that it could take a while (MI-14033)
5. Elements: Add filter for Trigger; display Trigger for Elements with Dataset as source
6. Elements: On the Associations tab, list the Bursts that contain the element
7. Update Simple SAML library we use for external auth (MI-10323)
8. The home icon will return to the *Default* homepage/Portal Page configured via a user's preferences or defined via Portal Page settings
9. Custom Scripts include more detail in their List page
10. Custom Scripts are now covered in regular garbage collection schedules

Security

1. Admins are warned when creating a new Group or Regular/Power User that has not been granted any Privileges or Permissions. While the Group or user account can be saved, the new user or members of the Group will not be able to do any meaningful work in the system or view any content until some Privileges and Permissions have been granted.
2. The "Manage Favorites Folder" and "Rename Favorites" Privileges have been merged into the new "Create Favorites" Privilege. A user with this Privilege can create Favorites, manage content and update related settings using the edit icon, and rename the default My Favorites folder. Favorites are now for the use of its creator and not for sharing content with others.

3. A new "Create Burst" Privilege has been added to allow Regular and Power users to define a Burst and subscribe members of Groups to which the user belongs and to individuals within those Groups to the Burst. A new associated Extended Security Privilege allows Power Users to subscribe or grant Burst Access to any User or Group.
4. On the User Access Request tab in the Power User dashboard, a Power User requires Edit Access in order to accept/deny the request. The grid's legend indicates "No Edit Access" in red.

Issues Fixed

1. Dataset Reports: Correct placement of Section when scrolling Table with a huge amount of columns
2. In the new Element creation process, if a new Category is required, the application will present you with the New Category popup. When the new Category is saved, it will keep you in the Element creation workflow (previously it would take you to the Category Editor, removing you from the Element creation process)
3. Portal Page Assets no longer have view access restrictions—this was causing problems when a user had view access to a Portal Page, but not view access to the Portal Page Asset Folder. Because Assets are intended to be viewed, we no longer restrict them. Only managing/editing a Folder can be restricted.

2. 2019 Releases

2.1 Release 5.6.0/5.6.1/5.6.2

Metric Insights 5.6 introduces a number of exciting new options for content personalization with BI tools like Qlik Sense, Tableau and others, distribution and management of that content, and auditing for Bursts.

1. **Filter Bookmarks** allow any User to personalize how they view and subscribe to their own External Report content for Tableau, Qlik Sense, QlikView, Spotfire and others.
2. **Filter Defaults** enable Power Users and Admins to present and distribute at enterprise-scale by utilizing User Maps:
   - Defaults can be set when *viewing a Report* (e.g., a Canada sales operations manager will open their Report with the preselected Canada value)
   - Bursts can be configured to *pass the correct Filters and Filter Values to the correct Users,* personalizing all delivered content, but only requiring a single Burst, a single External Report, and a single User Map (all working together).
   - For customers using our *Qlik Sense integration*, Filter Values can be collected automatically, with a single click, eliminating the need to search for Filter names in Qlik Sense and copy them to Metric Insights.
3. **Improved content discoverability functionality** aims at making User interactions with inaccessible content streamlined and user-centric via:
   - *Custom Access Denied messages* for multi-tenant environments, wherein different teams require different messages when content is not accessible.
   - [5.6.1] Additional Homepage preview settings helping Users to distinguish inaccessible content with a *lock icon* and protect sensitive data on images by *blurring*.
4. **Scripted Content Import/Export Utility** for command-line interaction is useful for the automatic promotion of content from development into production, executed on a schedule.
5. [5.6.1] **How-to Guide** helps facilitate the onboarding process for Power Users.
6. [5.6.1] **Bursting to Microsoft Teams** extends the existing Bursting functionality by enabling Users to configure Bursts to be delivered to a specified Microsoft Teams Channel right from the Burst Editor.
7. [5.6.1] **Logging Burst usage** allows for auditing User engagement with Bursts.
8. [5.6.1] **Burst unsubscribe** via text keyword reply is now possible for email/SMS subscriptions.
9. [5.6.2] **Custom unsubscribe confirmation messages** for SMS-based Bursts

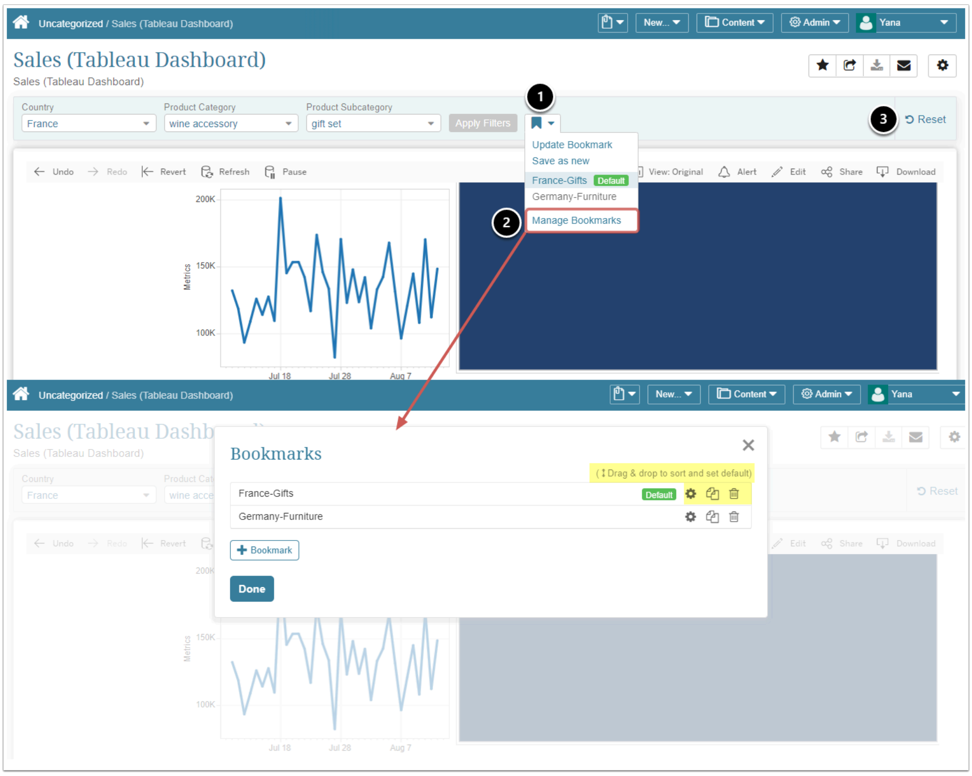
Major Features

1. Filter Bookmarks & Filter Defaults for External Reports

Filter Bookmarks are custom Filter combinations that can be saved. Bookmarks are User-specific *(i.e., only accessible to those Users who configured them)* and can function as the source for Report Notifications when a Bookmark is selected and its Filter combinations are delivered via email.

1.1. Managing Bookmarks

External Report Bookmarks can be created from the Report Viewer, with the first Bookmark automatically receiving a default name and status that can later be modified as needed. Setup options available in the **Bookmark pop-up** enable Users to override naming and display priority defaults.



To customize Bookmarks:

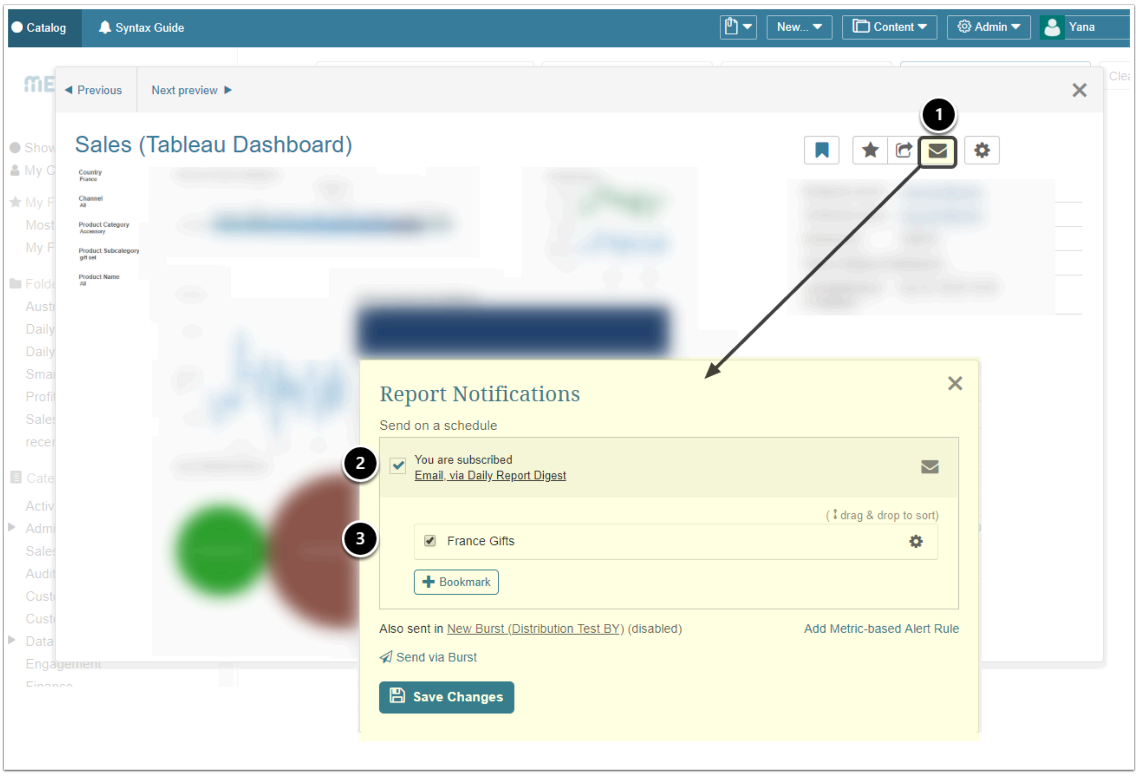
1. Open the **Bookmark menu** dropdown
2. Select **"Manage Bookmarks"**

3. In the pop-up window, **adjust the settings** via available controls

1.2. Subscribing to Notifications

Users can subscribe to **External Report Notifications** from the Report Viewer or Tile Preview.

After the Notification runs on Schedule, Users receive an email containing an External Report with the preselected Bookmarks.



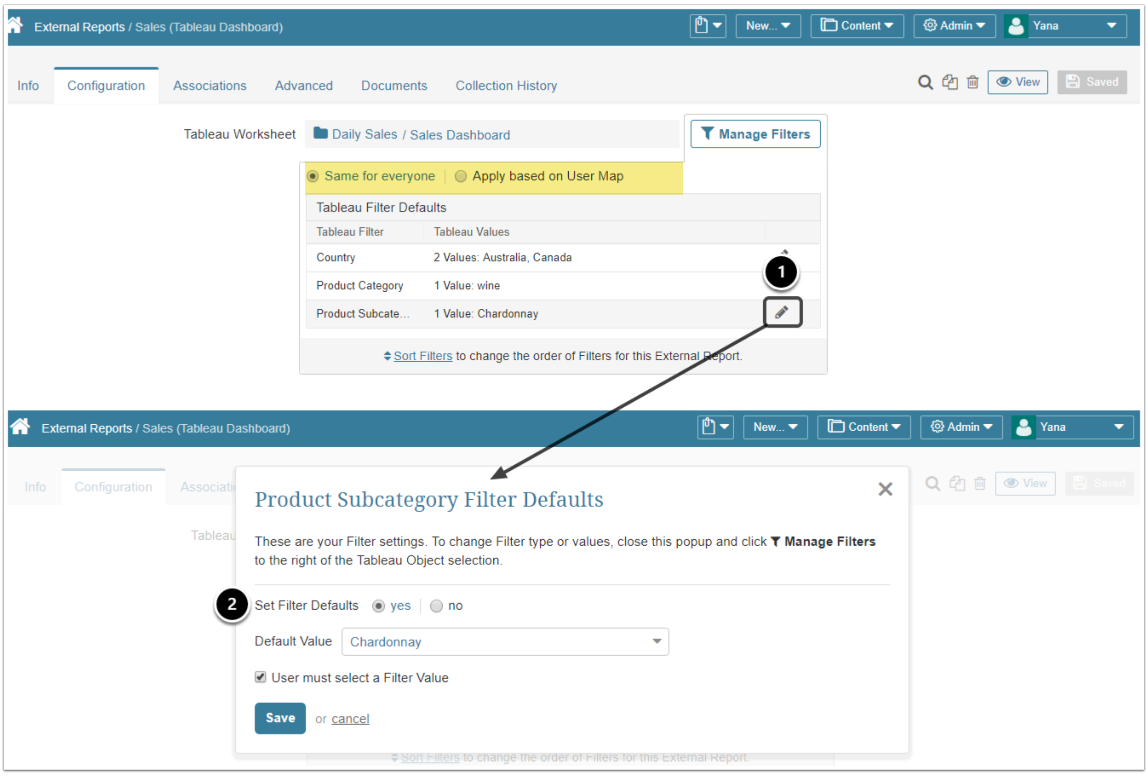
In the ***Tile Preview*** (or Report Viewer):

1. Click the **Notification icon**
2. Specify the **Report Notification**
3. Select a **Bookmark**
4. **Save Changes**

1.3. Setting Defaults

Configuring defaults allows content builders or administrators to define Filter settings either in a way that is the same for everyone, or apply them based on a User Map. Consequently, any number of Users will have the correct Filter Values when they open their External Report.

Below is an example of Filter Defaults that are set the same for all content consumers.



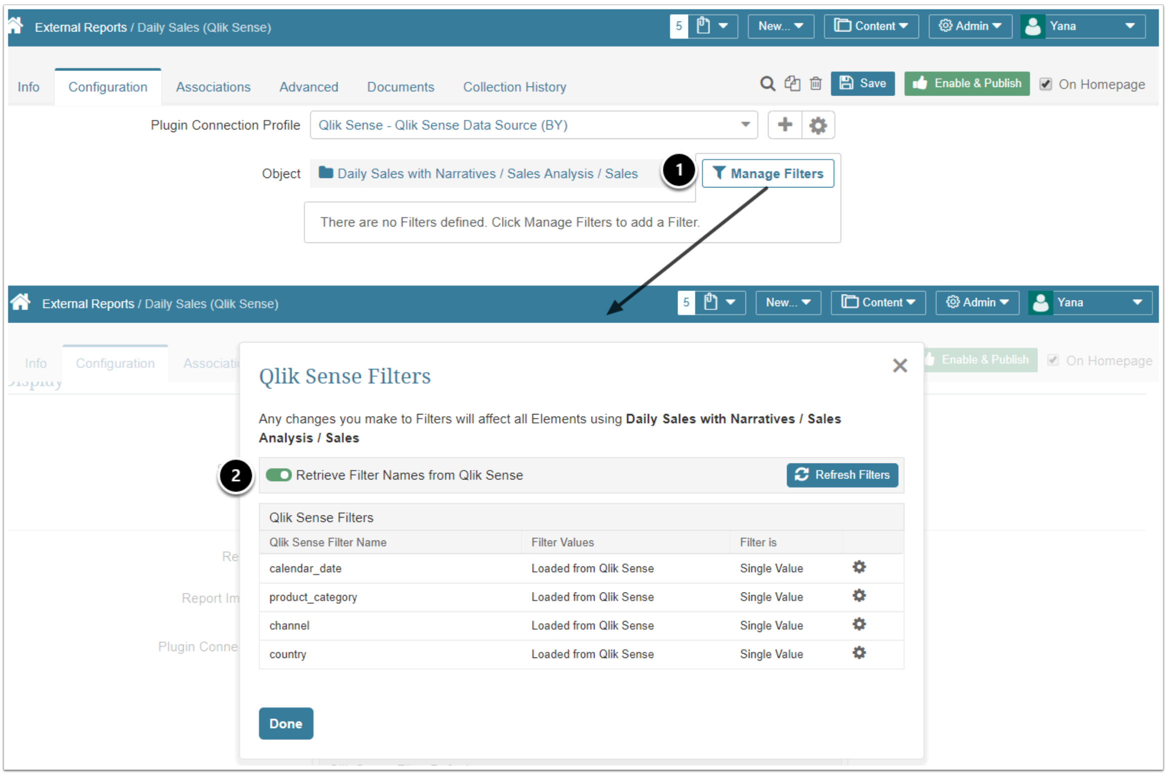
To set Filter Defaults:

1. In the External Report Editor, click the Filter **Edit icon**
2. In the pop-up, **Set Filter Defaults** to "yes"

1.4. Qlik Sense: auto-sync Filter Values

The Qlik Sense API enables automatic retrieval of Filters and Filter Values.

- For a detailed description of changes in data pre-filtering, go to [Pre-filtering Qlik Sense data (5.6+)]()

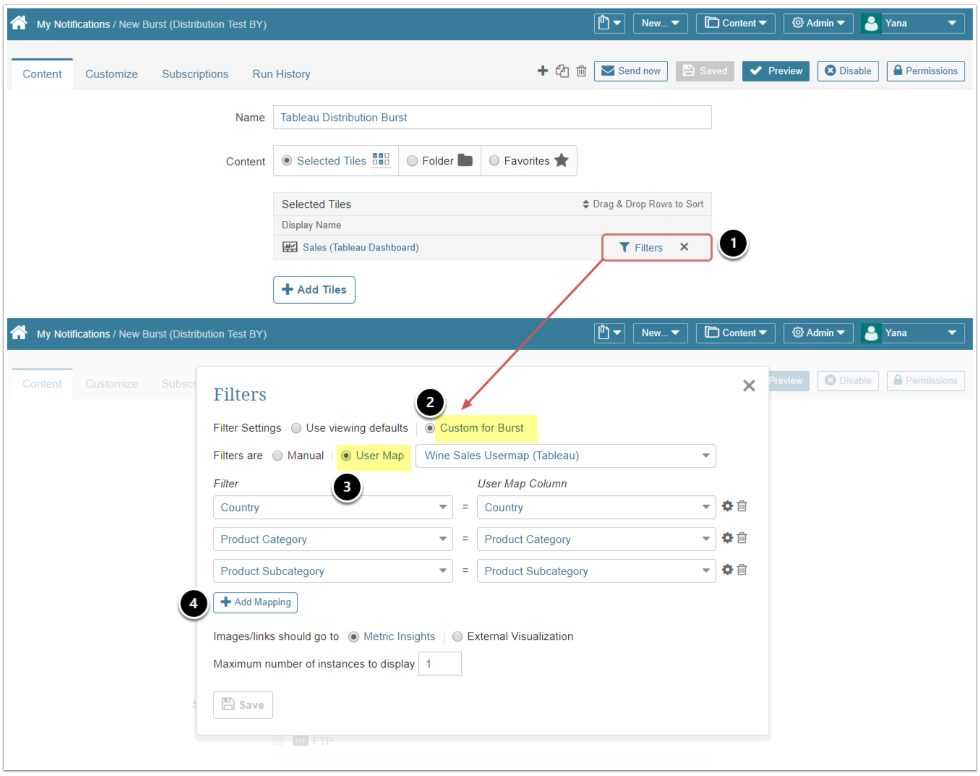


The auto-collect of Filter Values is enabled in the ***External Report Editor***. To activate the setting:

1. Click **[Manage Filters]**
2. In the pop-up window, set the **toggle to "ON"** for auto-syncing

2. External Reports: Enterprise Distribution

Extended Bursting functionality enables large-scale External Report distribution. Applying a User Map *(with the appropriate mapping of Users to Filters)* allows a single Burst to be the source for hundreds (or thousands) of User-specific emails. This means that each User (or Group) will receive targeted content based on their needs.



Burst content Filter settings are accessible from the ***Burst Editor***:

1. Click the **Filters icon** next to the External Report you have specified for distribution
    - *NOTE: Filters have to be set beforehand at Report Level in the **External Report Editor***
2. Select **"Custom for Burst"** Filter Settings
3. Choose the **User Map** option to personalize Filters for multiple recipients
4. **[+Add Mapping]** to apply selected Filters

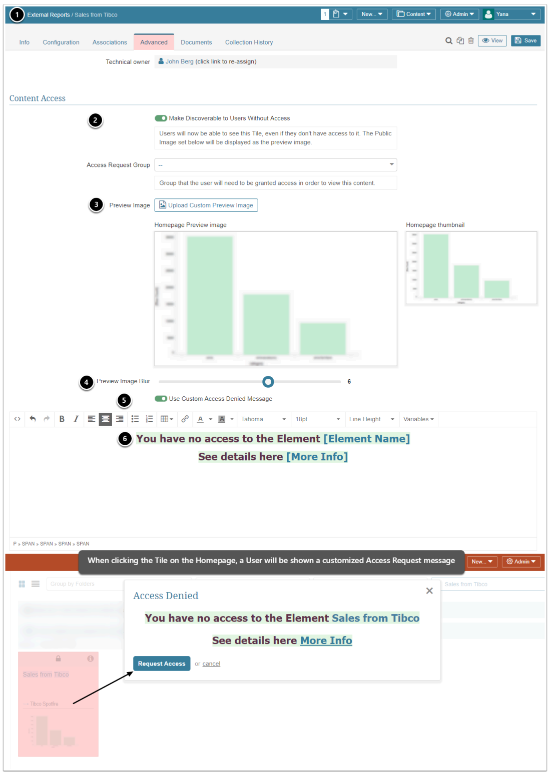
3. Custom Access Request messages

As of Release 5.6.0, our Security Model makes it possible to customize "Access Denied" messages at 2 levels:

1. Element level
2. Category level

For more information, refer to Custom Access Request for External Reports

We can also utilize Tableau's API to check whether a User has access to the relevant content (exclusive to Tableau, and only supported in Tableau 2018.3 or higher).



To configure a custom *Access Request message*:

1. Go to External **Report Editor > Advanced tab**
2. Activate the setting **"Make Discoverable to Users Without Access"**
3. Configure the **Homepage Preview Image**
   - *Use the previously generated image, or alternatively upload a new one*
4. [5.6.1] Optionally, **apply a Blur** to the Preview Image
5. Scroll down to **"Use Custom Access Denied Message"**: switching the toggle opens the Message Editor
6. **Enter your message** in the provided field
7. **Save**

When a User with no access clicks the Tile on their Homepage, your pre-configured *Access Request message* will be displayed.

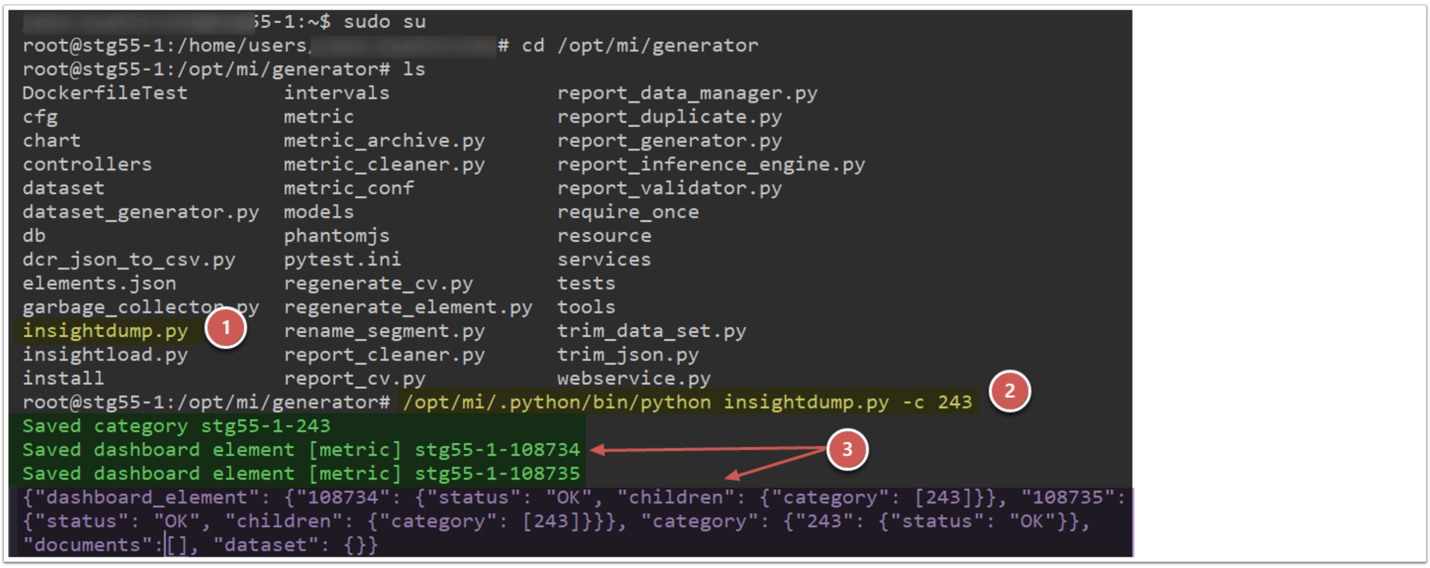
You can use the same workflow to customize a Request Message at Category level. For custom message configuration, go to the Category Editor.

4. Scripted Content Import/Export Utility

The Import/Export Utility has been upgraded to include **Scripted Content Migration**, enabling Users to move content from one instance to another via a command-line tool.

- For more information, see [Scripted Migration Utility]

The image below illustrates how a Category can be exported.



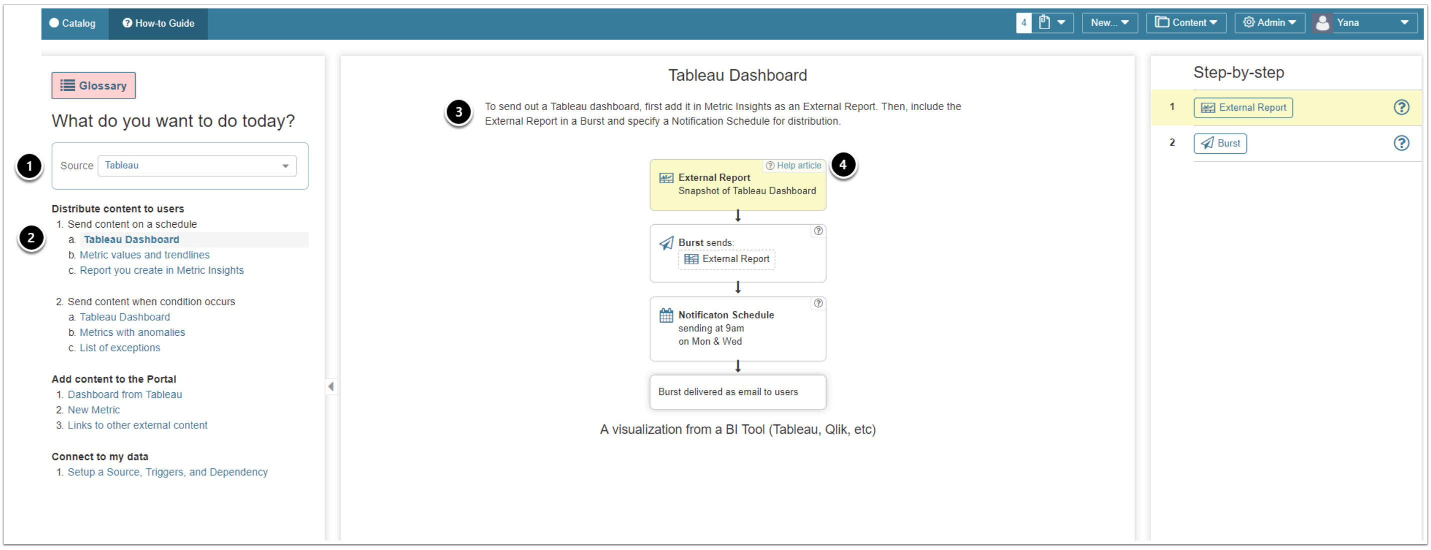
To export a Category:

1. Use **Migration Script**
2. Run the **command** /opt/mi/.python/bin/python insightdump.py -c 243 *(where -c represents Category followed by Category ID)*
   - Alternatively, use sudo /opt/mi/.python/bin/python /opt/mi/generator/insightdump.py -c 243
3. If executed successfully, the **exported Category** and **associated Elements** will be shown in the Script execution log and displayed in output of the command run

For assistance, contact Metric Insights Support at **support@metricinsights.com**

5. [5.6.1] How-to Guide for Power Users

The "How-to Guide" will lead you through the process of using popular BI tools as Data Sources within the Metric Insight Portal. The Guide's Glossary will help new Users get familiar with the key concepts related to Content creation and its distribution.



To start using the "How-to Guide", go to **User menu > How-to guide**

1. Select the **Data Source**
2. Choose **what you want to do** with Content
3. Read through the provided **instructions**
4. If necessary, refer to the **help article** for more detail
    - *Hover over the ? sign to access this option*

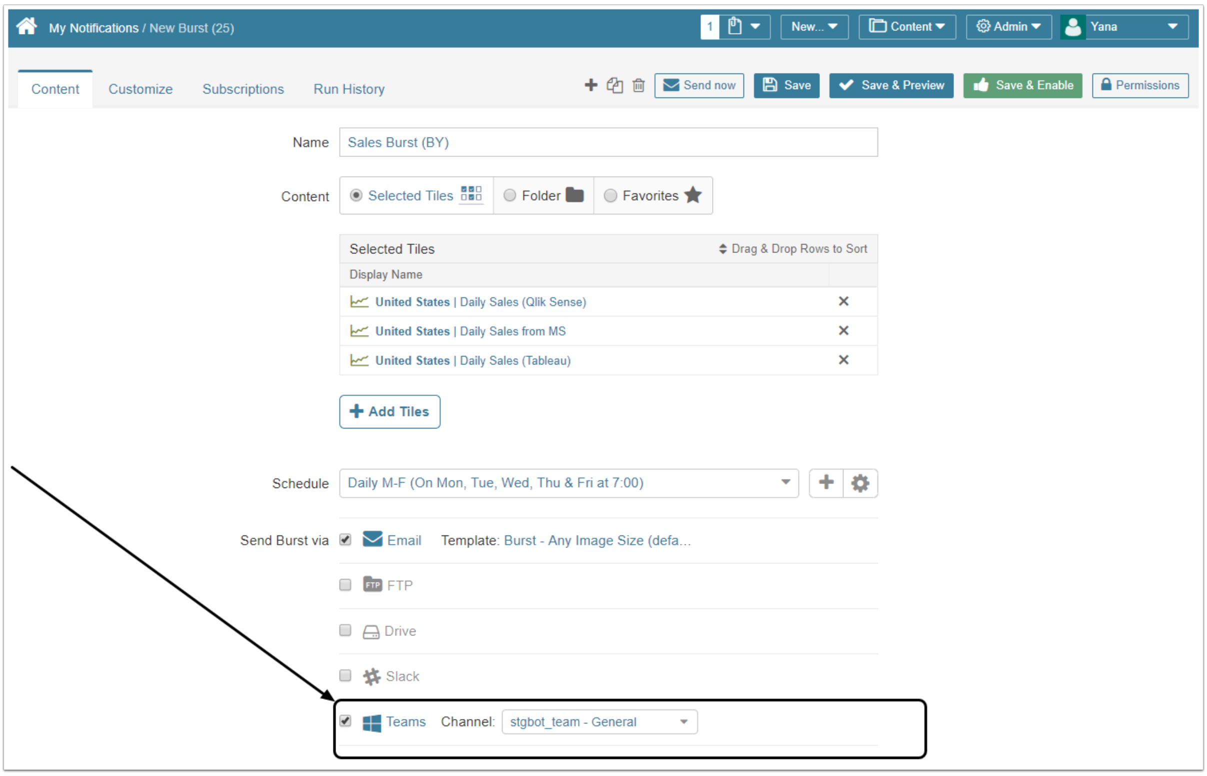
6. [5.6.1] Bursts: Microsoft Teams distribution

Bursts can now be sent to Microsoft Teams directly from the Burst Editor.

- For details, refer to [Bursting to a Microsoft Teams Channel]

Security settings must allow a Microsoft Teams Channel to access elements that are bursted to that Channel

- To learn more, click [Microsoft Teams Security and Access]



For Bursting:

1. Activate the corresponding option **"Send Burst via" Teams** in the Burst Editor
2. Select a **Channel** where a Burst should be delivered

7. Portal Pages: increased capabilities

New in 5.6.1, Users can set a Portal Page as their Start location. Via My Settings, Users can override previous Portal Page selections configured by Page Creators or Admins.

- See details in [Setting a Portal Page as your Start Location]

Portal Page functionality features improvements in terms of:

1. Security
2. Logging

From the standpoint of Security, Portal Page sharing can now be limited to a certain User Type (Admin, Power or Regular User). The corresponding setting allows imposing restrictions on any of the above-mentioned types of Users.

User engagement with Portal Pages *(i.e., links clicked on a page)* can now be tracked with the respective logs in database tables.

8. Enhanced Performance for multi-thousand user deployments

User Access database tables has been reduced in terms of row count, no longer storing the entire Cartesian product of Elements times Users. Instead, only rows that represent Elements to which Users actually have access are contained in the tables. This approach offers manifold speed boost for large User deployments.

The rearchitecture will increase system efficiency when performing operations like:

1. Adding Users
2. Creating Elements
3. Rebuilding the User Access table

9. [5.6.1] Logging Burst-related events

Any Burst-associated activity is now logged to the main database, allowing for Burst usage auditing and troubleshooting.

The following data is recorded as separate database entries:

1. All subscribe and unsubscribe events
2. All events related to Burst deletion
3. User and Burst IDs linked to subscription, unsubscription and deletion
4. Date and time a Burst is subscribed to, unsubscribed from or removed

10. Plugins

We have refined our **Test Connection** feature. It can now generate more explicit error messages, specifying the exact causes of connection issues encountered at connection checks *(e.g., incorrect or missing parameters, disabled ports and so on)*. Improved error messages have been developed for the following plugins:

1. Tableau
2. Qlik Sense
3. QlikView
4. Microsoft Power BI

11. Miscellaneous

Dataset Reports

1. Dataset Report functionality has been extended with the ability to embed a full Dataset Report into a Portal Page via a custom URL.
2. Public Viewer has been enabled to make a Report viewable without login.

Mobile

1. Android: support for Alert with Other Element as payload has been implemented.
2. Android: the app now supports Touch ID (fingerprint recognition).

Database/Security

1. Database schema has been updated to prevent Database locking if the Security Model makes any changes during User login.

Bursting

1. [5.6.1] A User can unsubscribe from a Burst via e-mail/SMS by replying with a word that is defined in the UNSUBSCRIBE_TEXT_FOR_BURST config variable *("stop", "unsubscribe", "no" are default options)*.
2. [5.6.2] A Burst creator sending a Burst to SMS can now set a custom "Unsubscribe confirmation message" via the Customize tab in the Burst Editor. In order to see the setting, you must select a "SMS Template" as the Email Template.
3. [5.6.2] Bursts with subscribers that are set via a User Map can accept new subscription after same user has been unsubscribed (in other words, the user can resubscribe without any issues)
4. [5.6.2] Admins can now prepend an arbitrary text string to the subject of all emails (Bursts and other types of notifications) via PREPEND_TEXT_TO_EMAIL_SUBJECT config variable (this useful for initiating an third party encryption packages)

12. Known Issues

Dataset Reports

1. [5.6.1] Table Filters are ignored in row counts.

13. Bugs fixed

Categories/Subcategories

1. It is now possible to hide a Subcategory (as well as a Category) on the Homepage.

Documents

1. Documents added to the newly created Document Types can be grouped by Type.

External Triggers

1. Email messages generated by the System now contain information on "Timed Out" Trigger errors occuring at Data Collection.

Bursting

1. An SMS Burst is no longer sent if there is not data in the containing Report.

Dataset Reports

1. The Count Measure in the Pivot Table (with applied "OR" type Filter Rules) now displays correct results.

2.2 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.

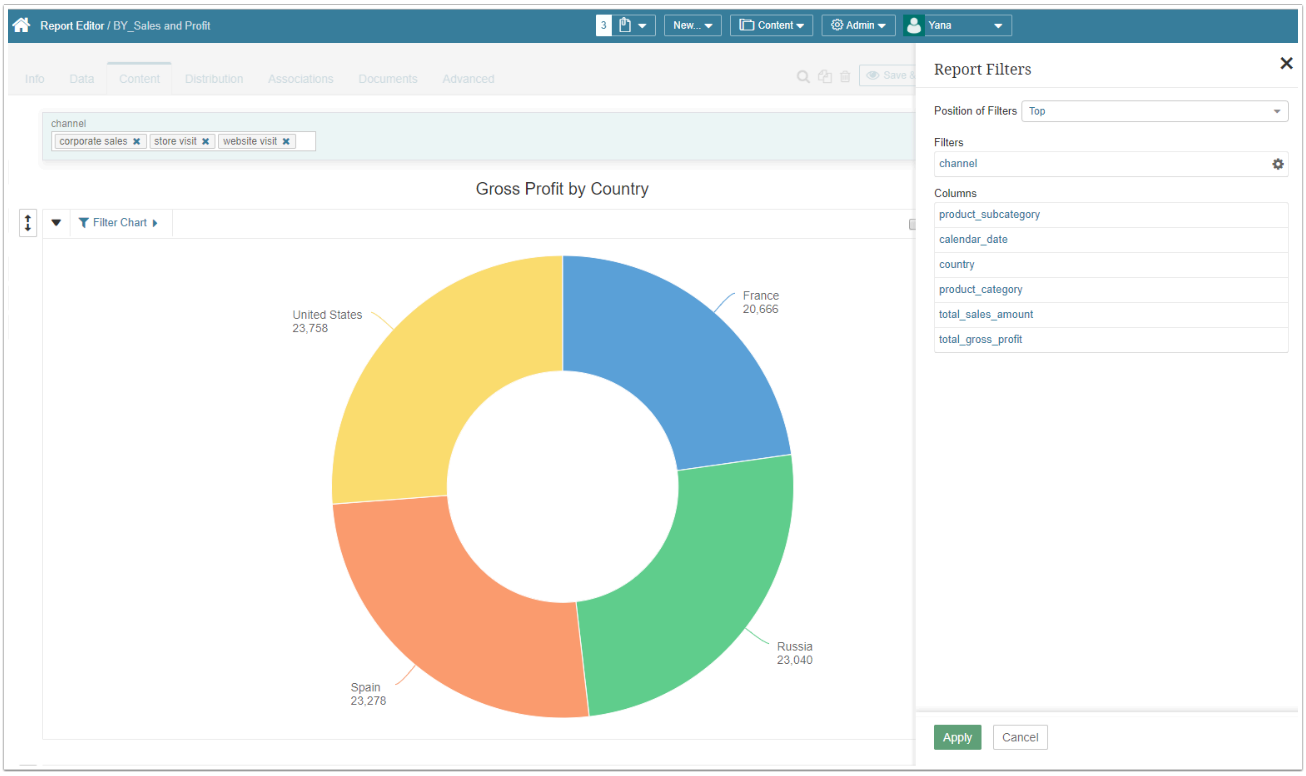
1.1. Data Filtering

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

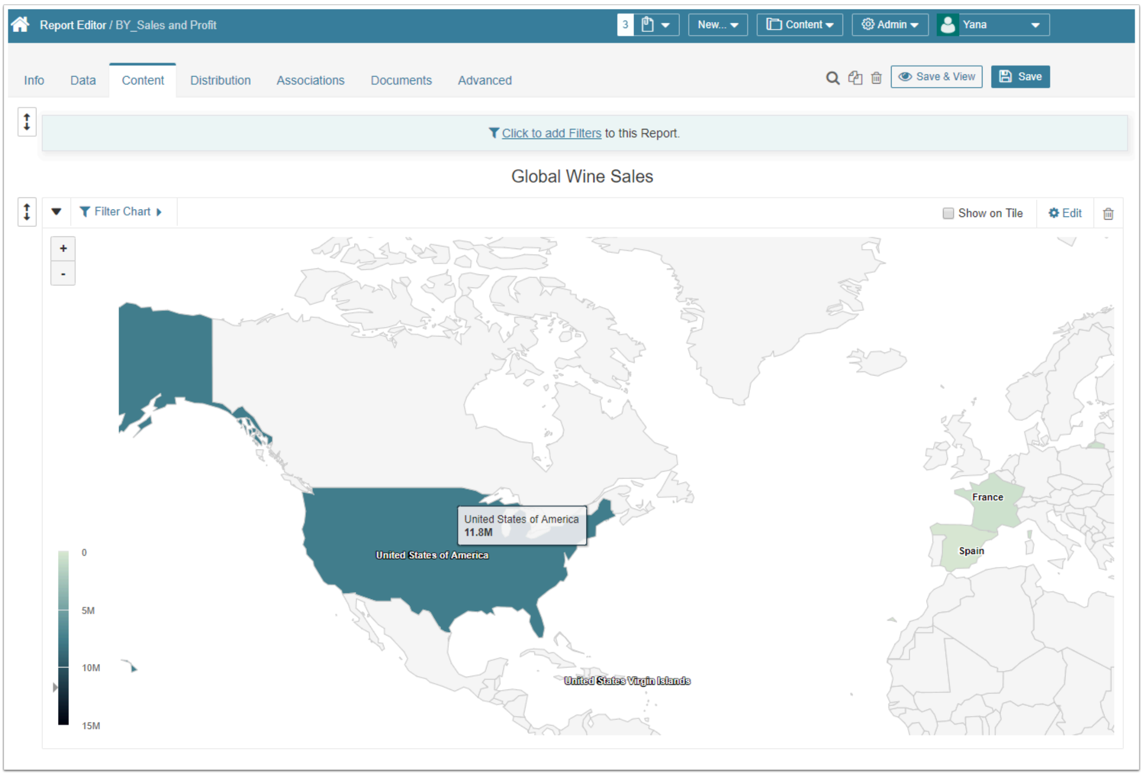


1.2. New Charting Capabilities

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

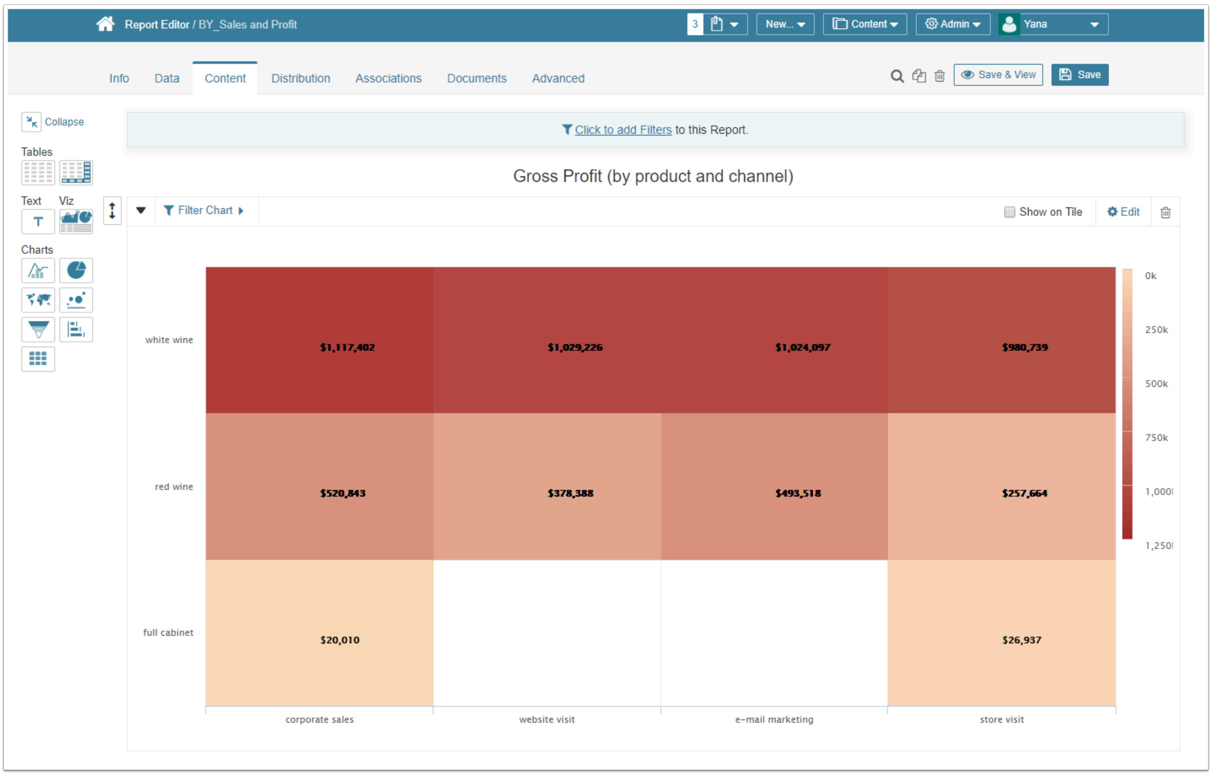
For details, refer to [Creating Charts in Dataset Reporting]



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]



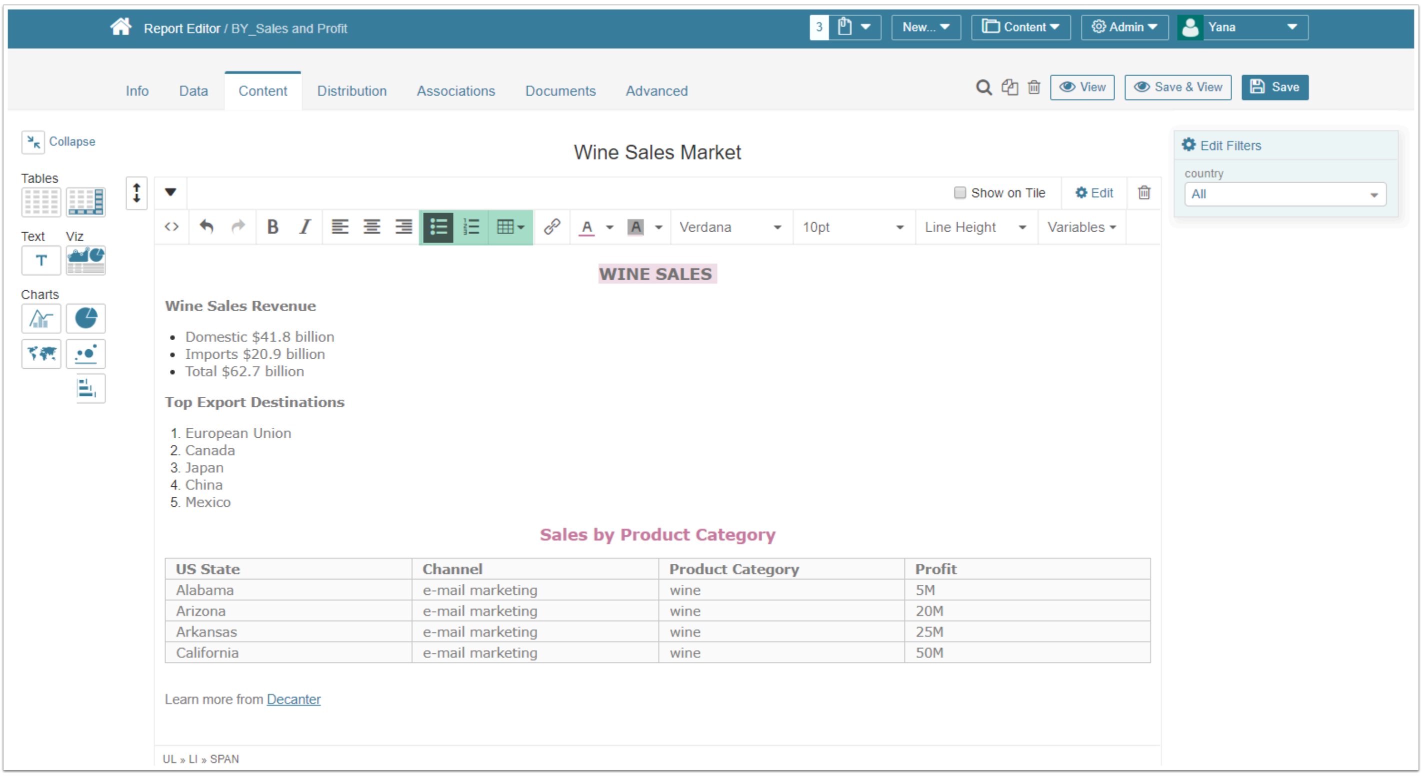
1.4. Rich Text Blocks: formatting

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



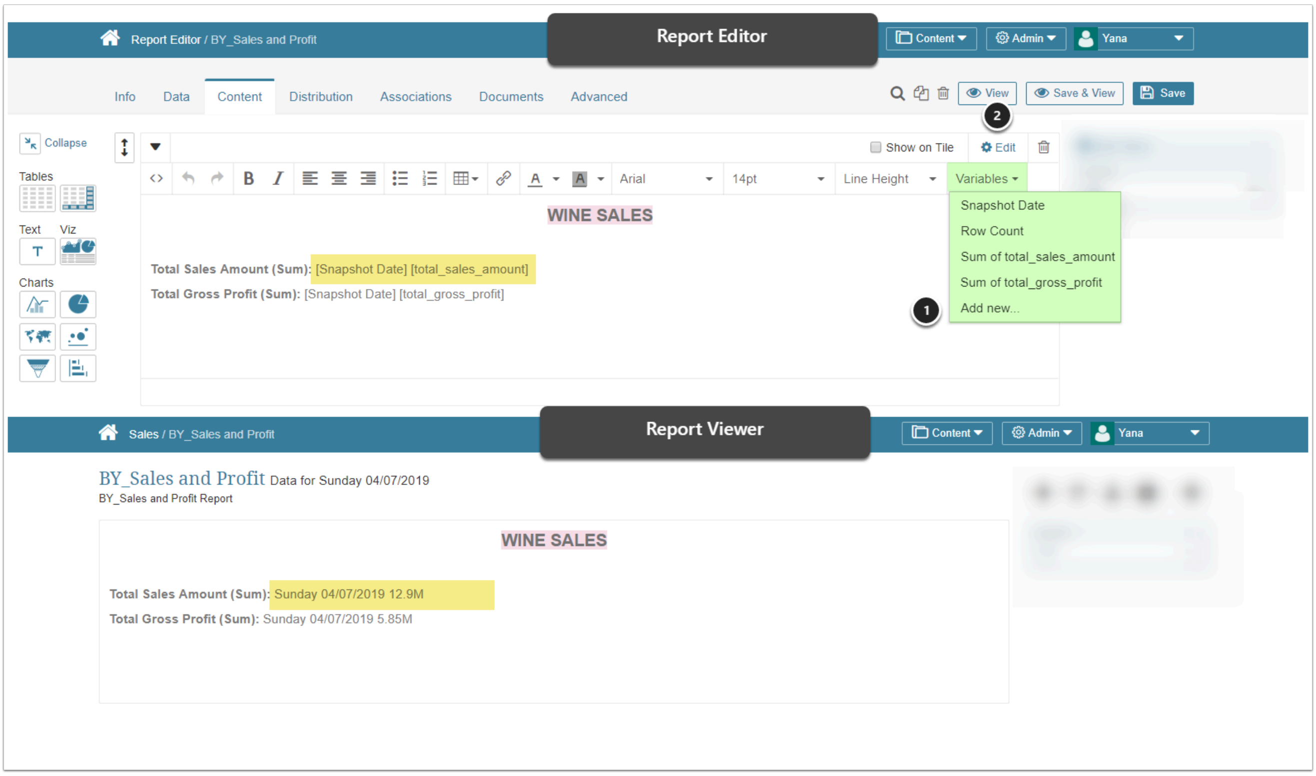
1.5. [5.5.1] Rich Text Blocks: variables

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

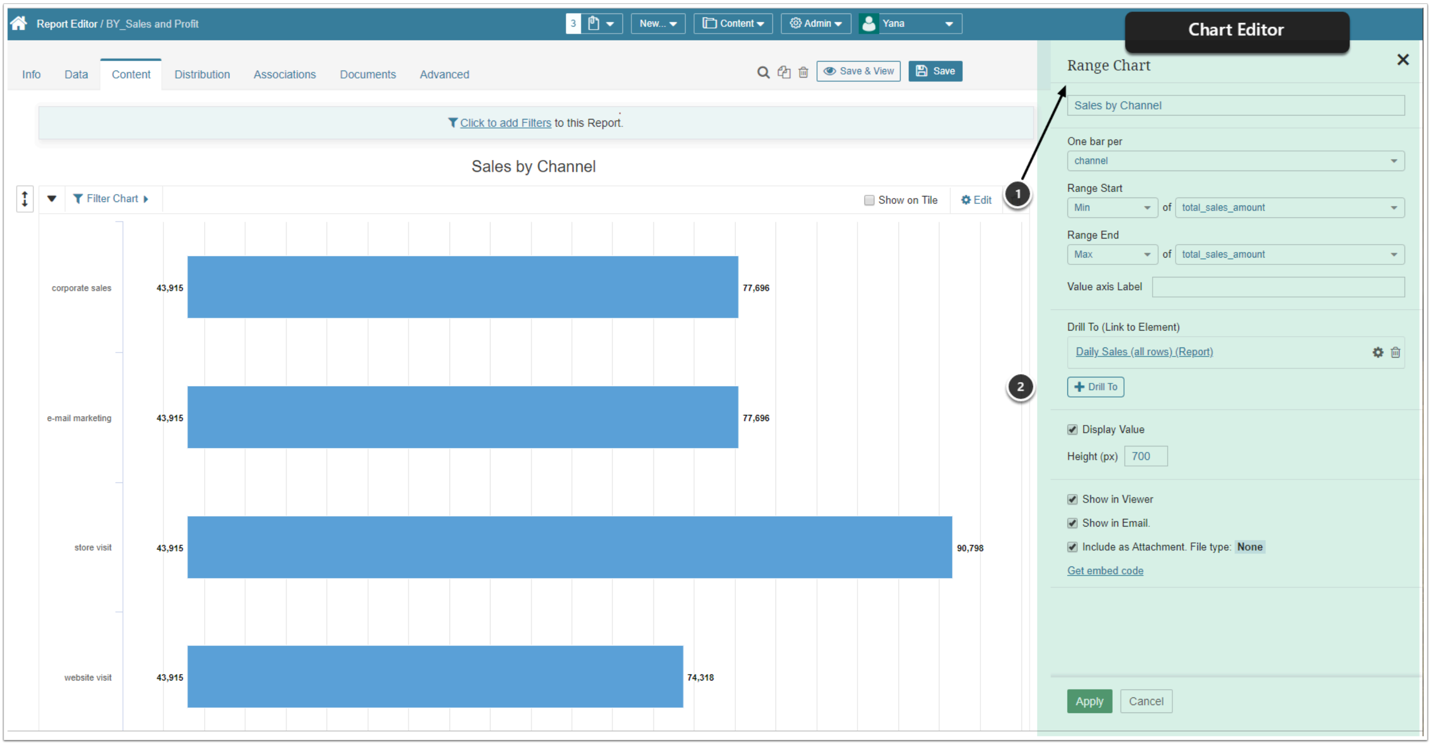


1.6. Elements for Further Analysis (Drill To other Elements)

"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



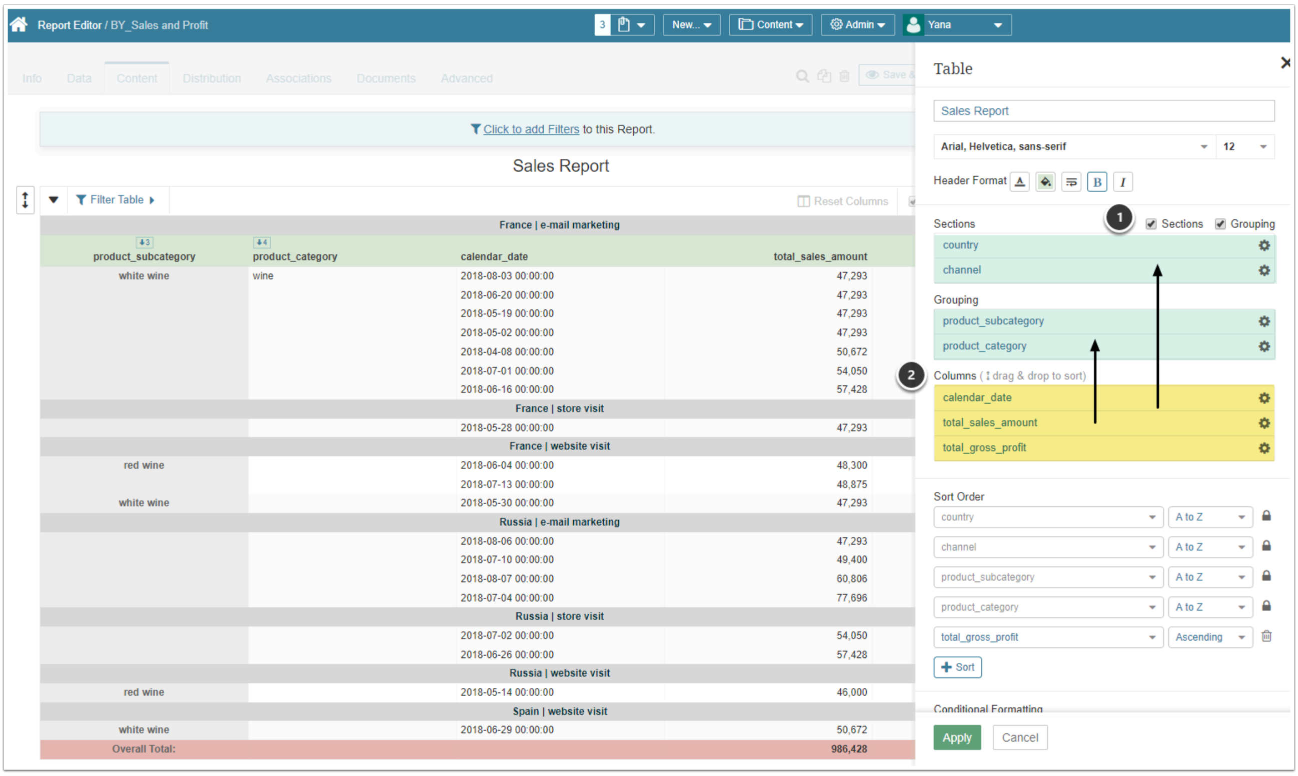
1.7. Tables: Sections and Grouping

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]()



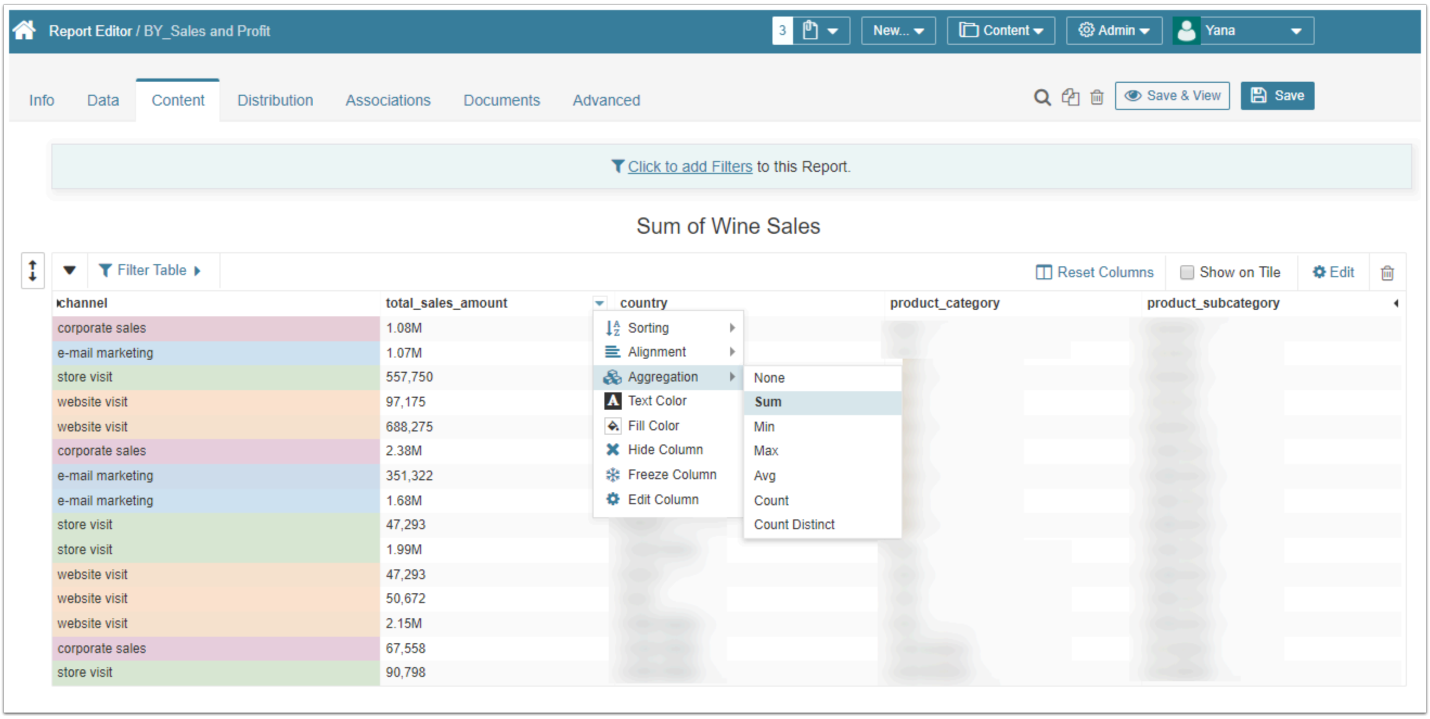
1.8. Tables: Aggregation

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

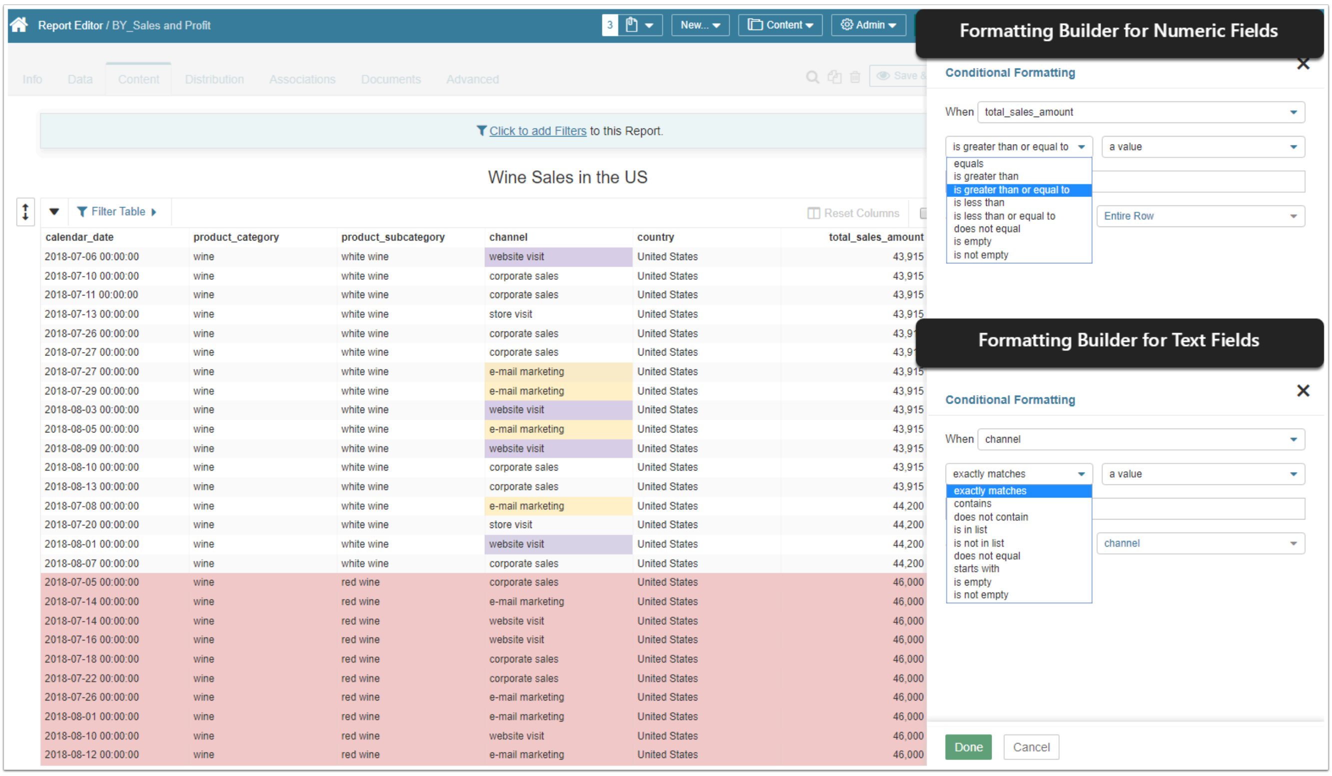
For further information, refer to [Adding Column Aggregation to Dataset Report Tables]



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



1.10. [5.5.1] Tables: Row Count changes

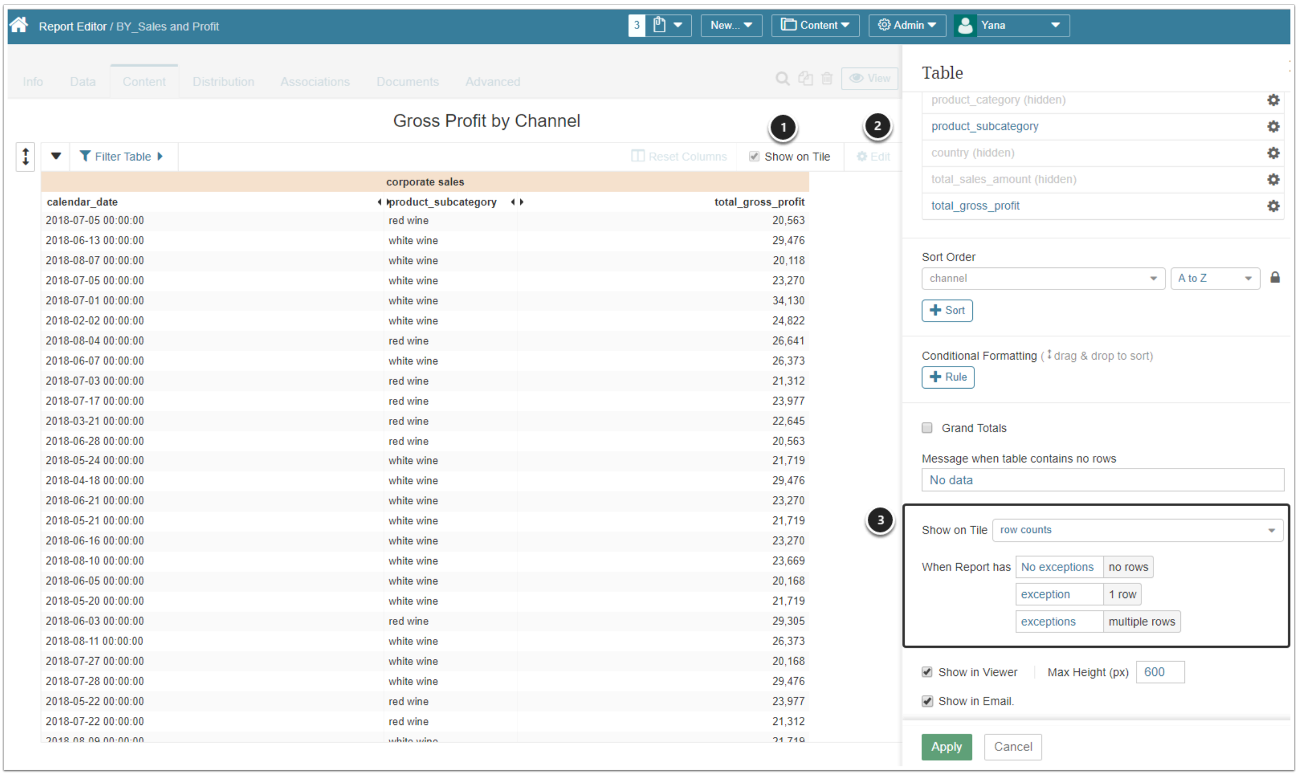
In Version 5.5.1, Row Count configuration settings have been extended.

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

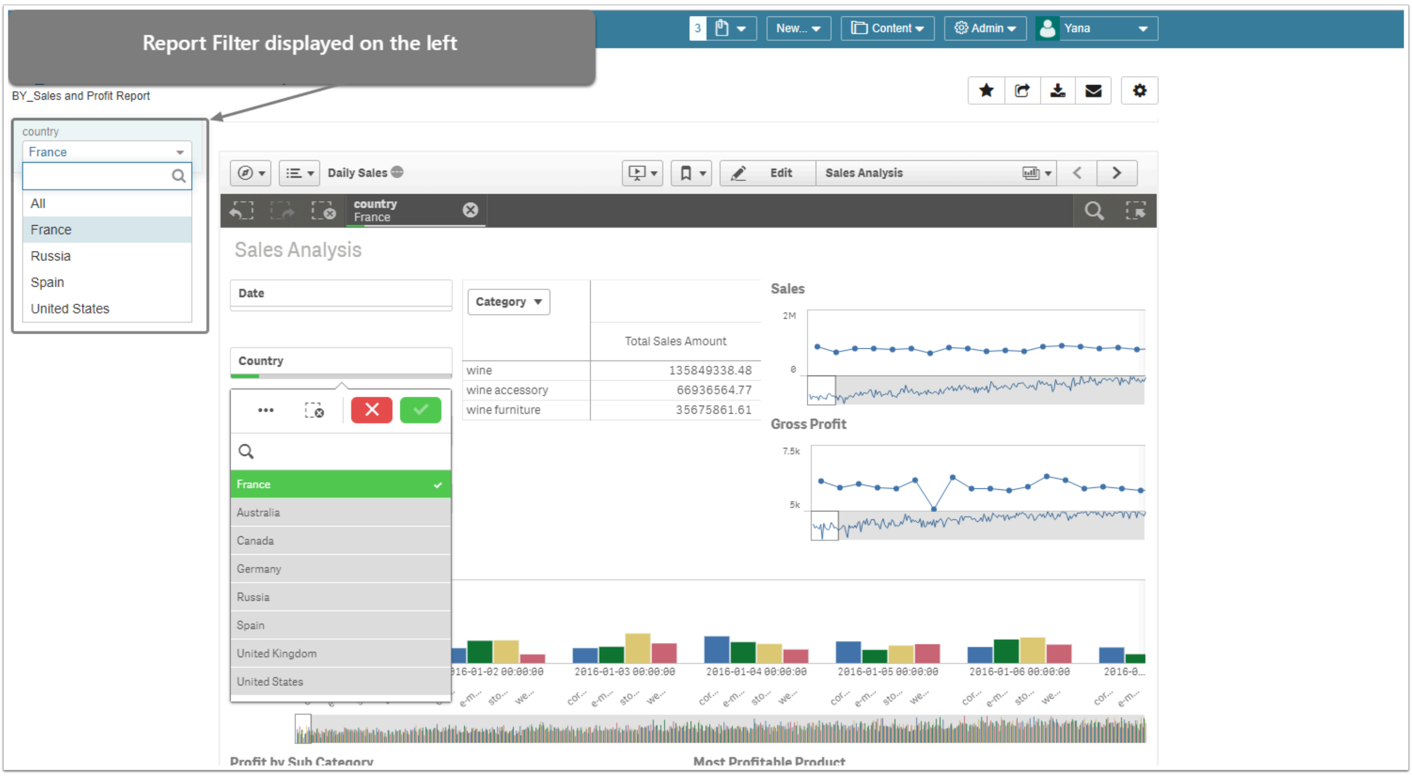


1.11. Dataset Report Viewer changes

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").



2. Bursts: Slack distribution option

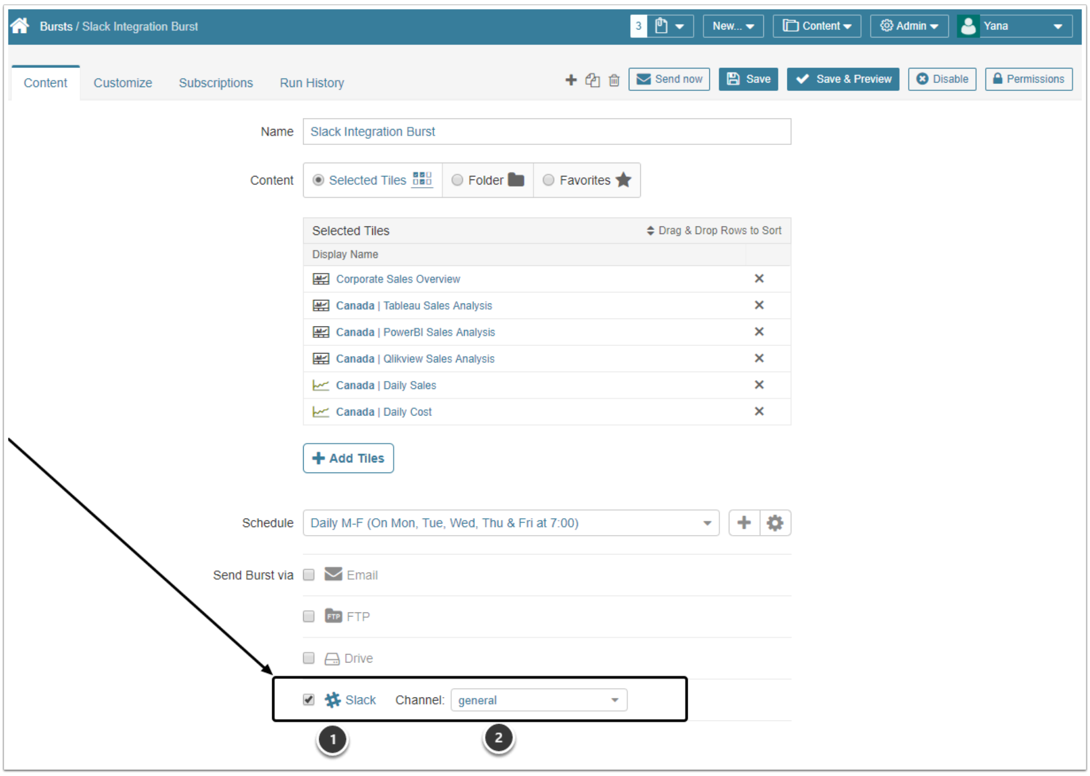
Bursts can now be sent to Slack directly from the Burst Editor.

For Slack Bursting:

1. Activate the corresponding option **"Send Burst via" Slack** in the Burst Editor
2. Select a **Channel** where a Burst should be delivered

For details, refer to [Bursting to a Slack Channel (5.5 and beyond)]

1. Security settings must allow a Slack Channel to access elements that are bursted to that Channel
   - To learn more, click [MI Slack App Security]
2. Bursting only works for public Channels



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

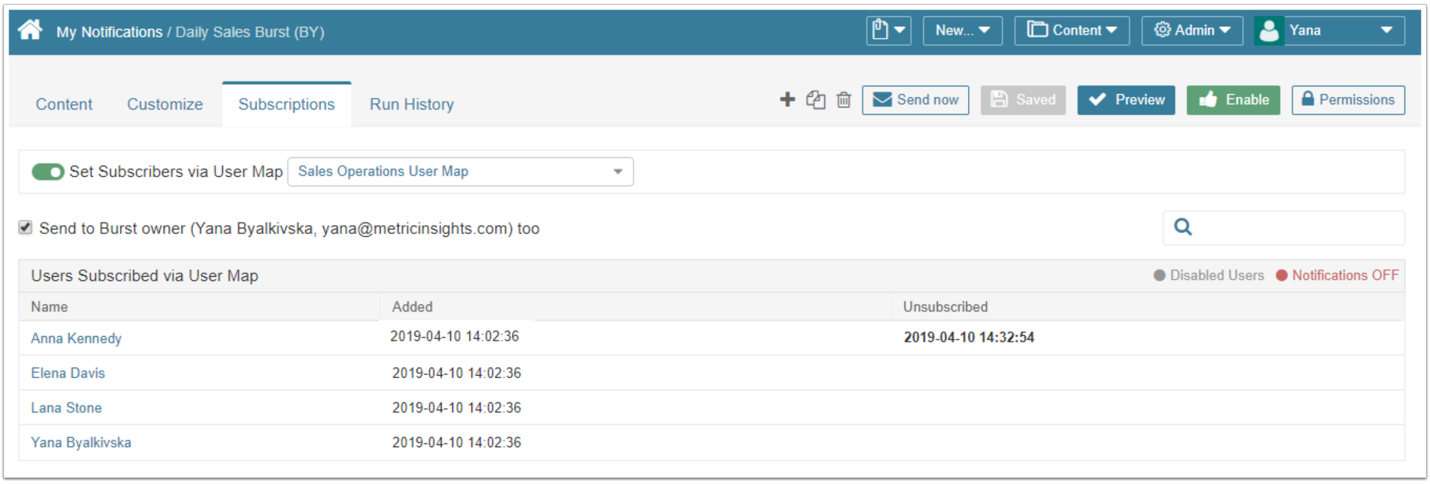
1. *"Access Target View" Privilege* has been removed for all users; it is no longer needed since any user can view the Targets if the Metric has them.
2. If a User Map has been applied to Reports built from Datasets, the restriction not to include Admins has been removed. An Admin or PU (Power User) 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 *Unsubsribed*.

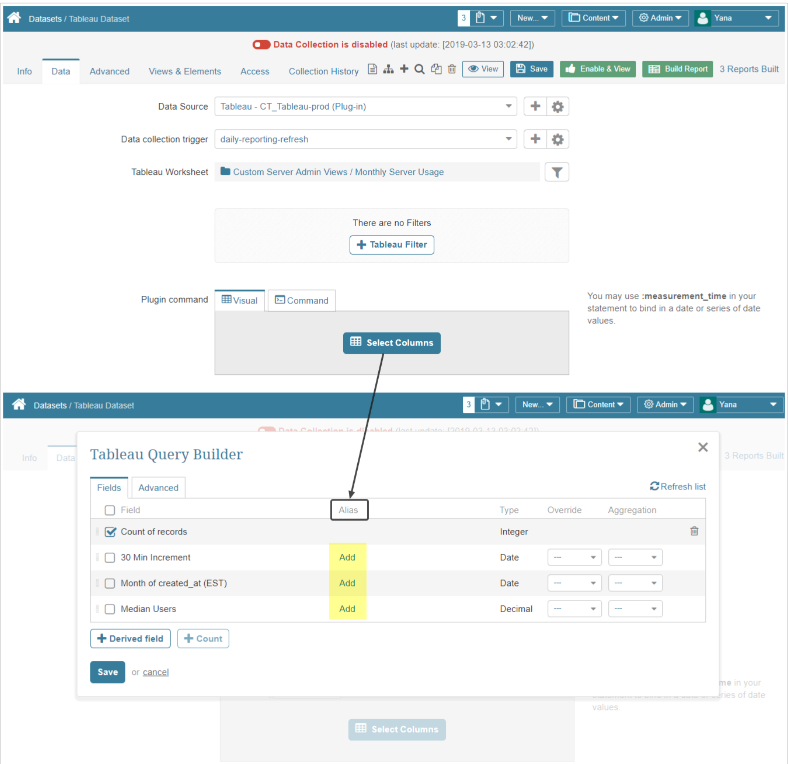
- Activate the **"Set Subscribers via User Map"** toggle to see the list User Maps available in the dropdown.

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



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.



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

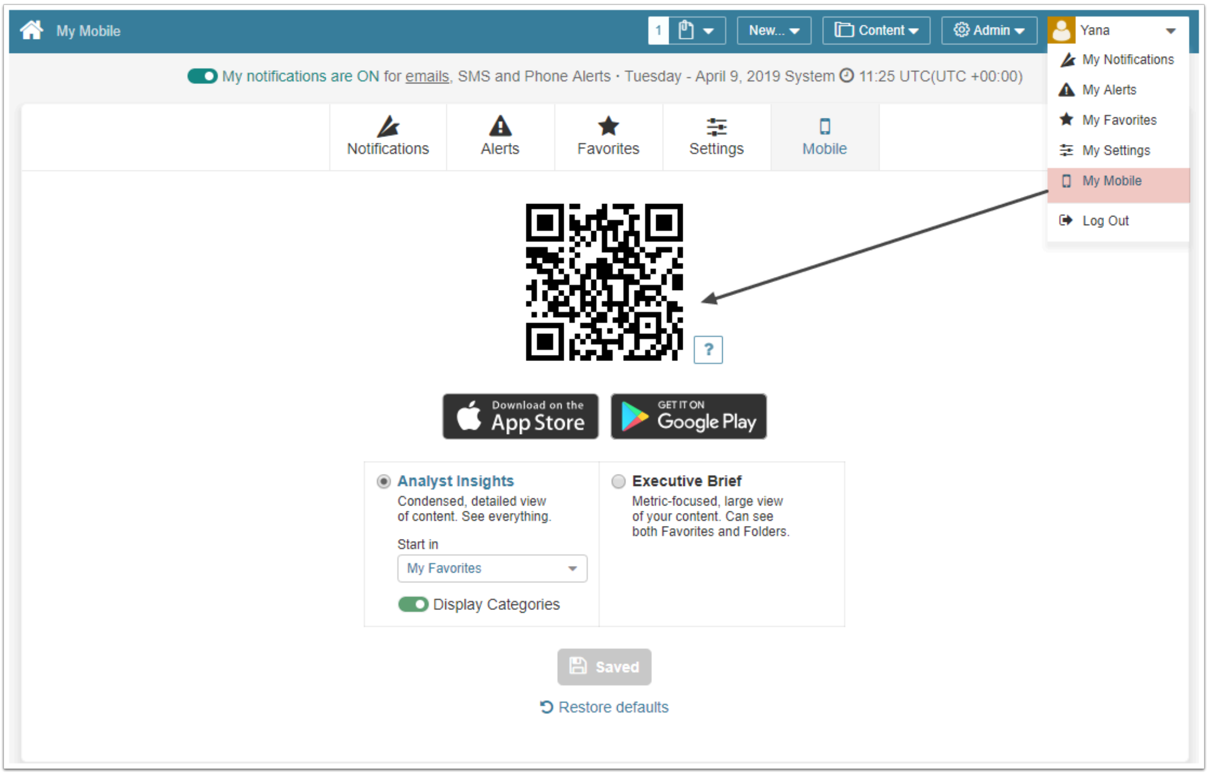
5.5.1 My Mobile application uses QR Codes to make setting instance URL fast and easy.

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.

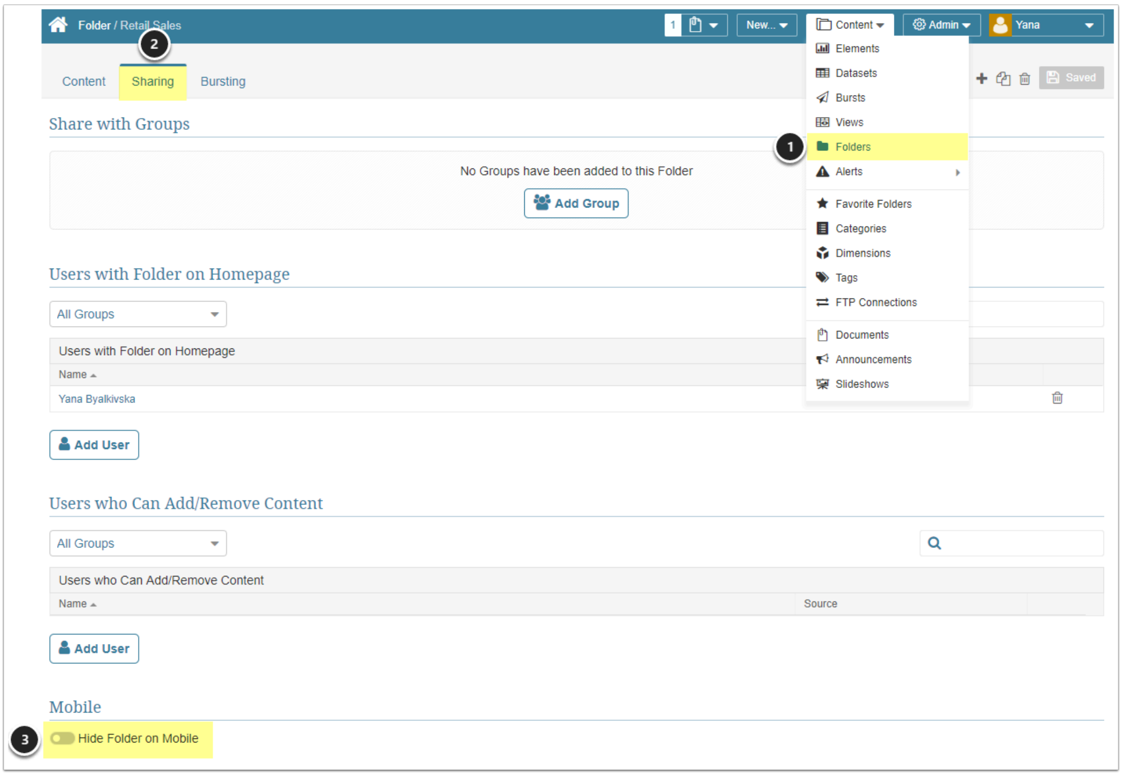
Learn more from [iOS, Android] Set instance URL via QR code



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

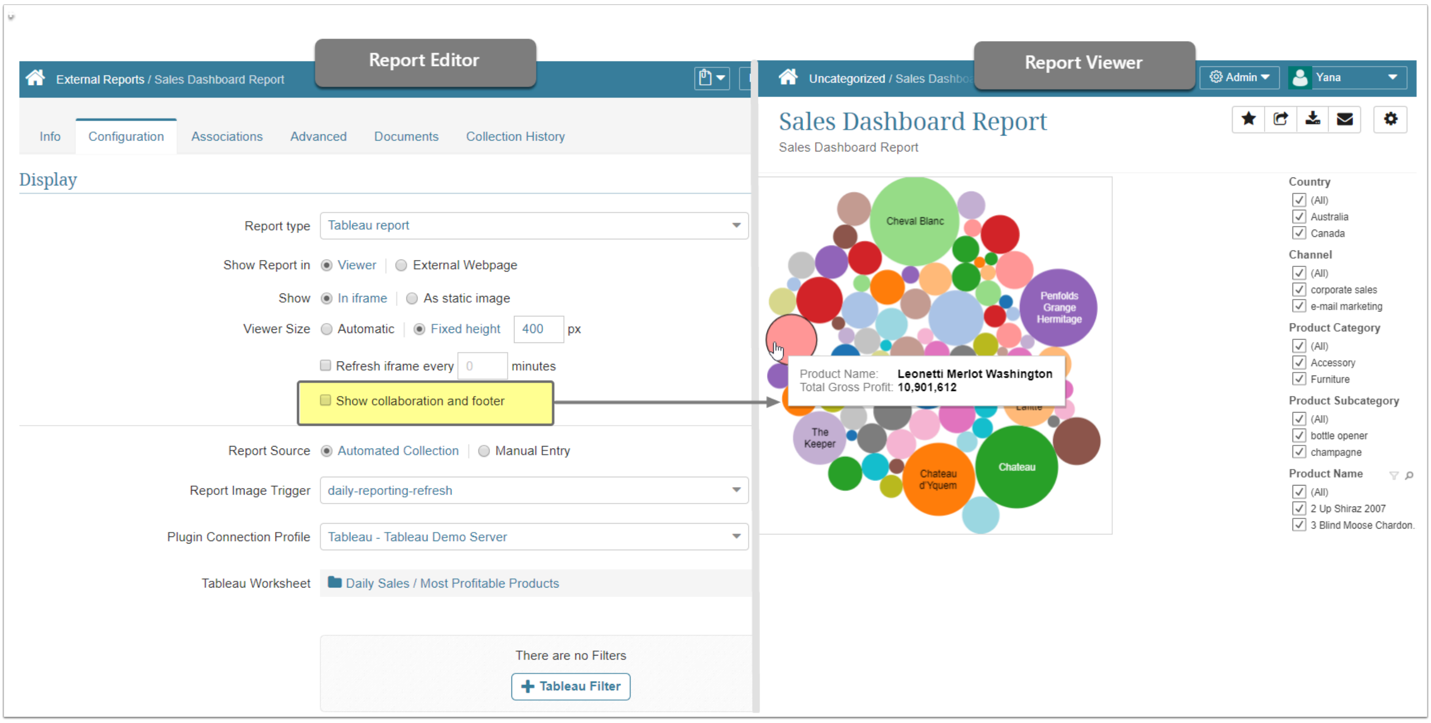


8. [5.5.1] External Reports: option to hide Collaboration and Footer

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.

2.3 MI Chatbot Release 5.5.0/5.5.1

MI Chatbot now integrates with two major collaboration platforms: **Slack** and **Microsoft Teams**. Overall, the 5.5.0/5.5.1 Releases have brought a major functionality boost as well as a number of UI changes.

Among the key features are:

- Microsoft Teams: Integration
- Microsoft Teams: MI Chatbot settings
- Slack: channel-specific configuration variables
- Slack: configure access with Default Groups
- Slack: ability to send Bursts from the Burst Editor

New Features

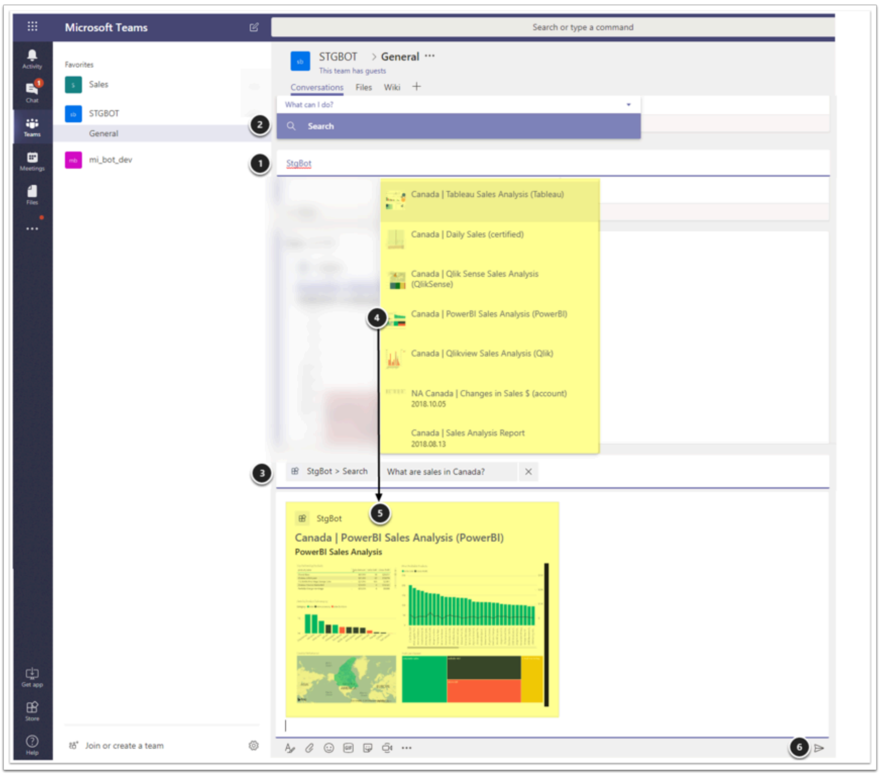
1. Microsoft Teams: Integration

Starting with Release 5.5.0, MI Chatbot is available for Microsoft Teams. The current integration allows the bot to process user requests for data and deliver content from Metric Insights to the specified channels in Microsoft Teams.

To query elements from Metric Insights, access the required *Microsoft Team* and *Channel* first. Then:

1. Address the MI Chatbot by typing **@bot_name**
2. Double-click the **Search** field
3. Enter your question or Tile name in the **Search** field
4. Select a Tile from the **Suggest List**
5. **Preview** the Tile
6. Click the **Send button** to share your Tile with the channel

The full scope of this functionality is described in Access content in Microsoft Teams



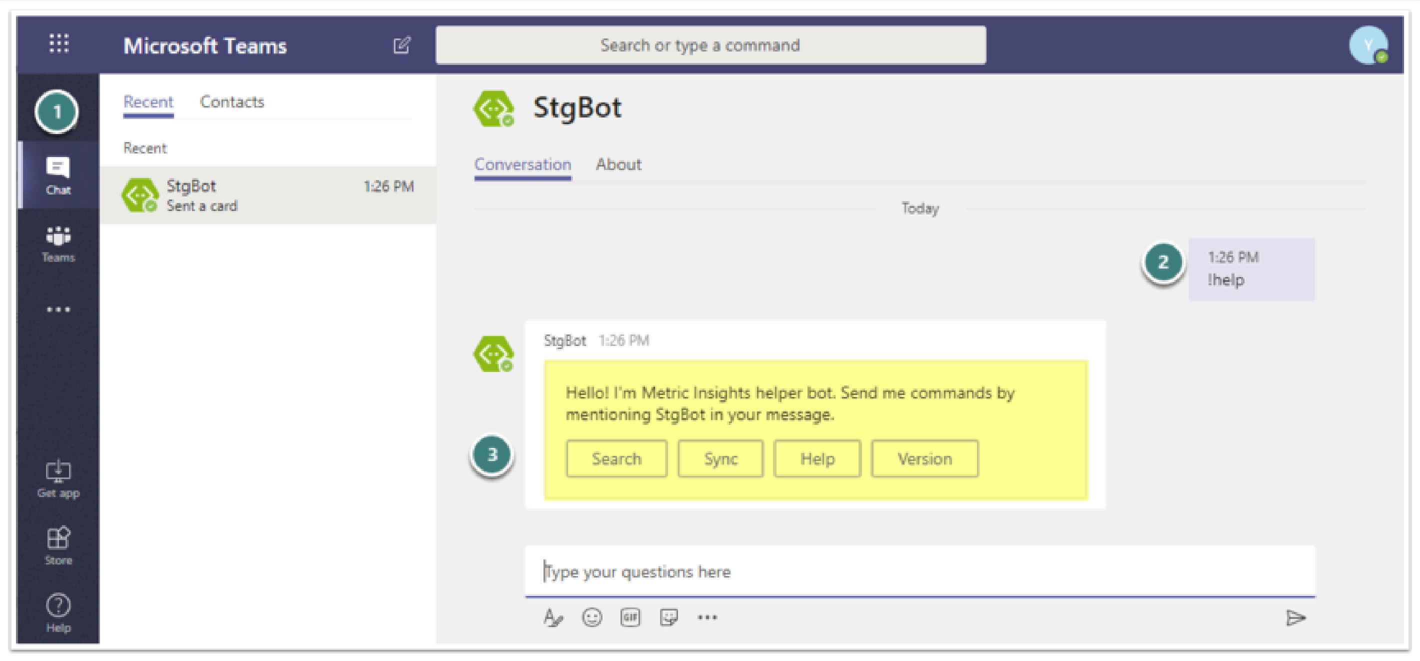
2. Microsoft Teams: MI Chatbot settings

MI Chatbot can be controlled with a number of commands accessible via Direct Messaging. "Search", "Sync", "Help", and "Version" commands allow users to search for Tiles, run synchronizations with the MI application, query help as required, and learn about the current version of the MI Chatbot.

To view available commands:

1. Access a Chat for **Direct Messaging** the MI Chatbot.
2. Type **!help** command to see options.

For a detailed overview, access [Managing MI Chatbot settings]



3. Slack: channel-specific configuration variables

In addition to *global configuration variables* that affect all connected Slack channels, it is now possible to use variables that alter the MI Chatbot behavior for a particular channel.

Among the settings that can be modified per channel:

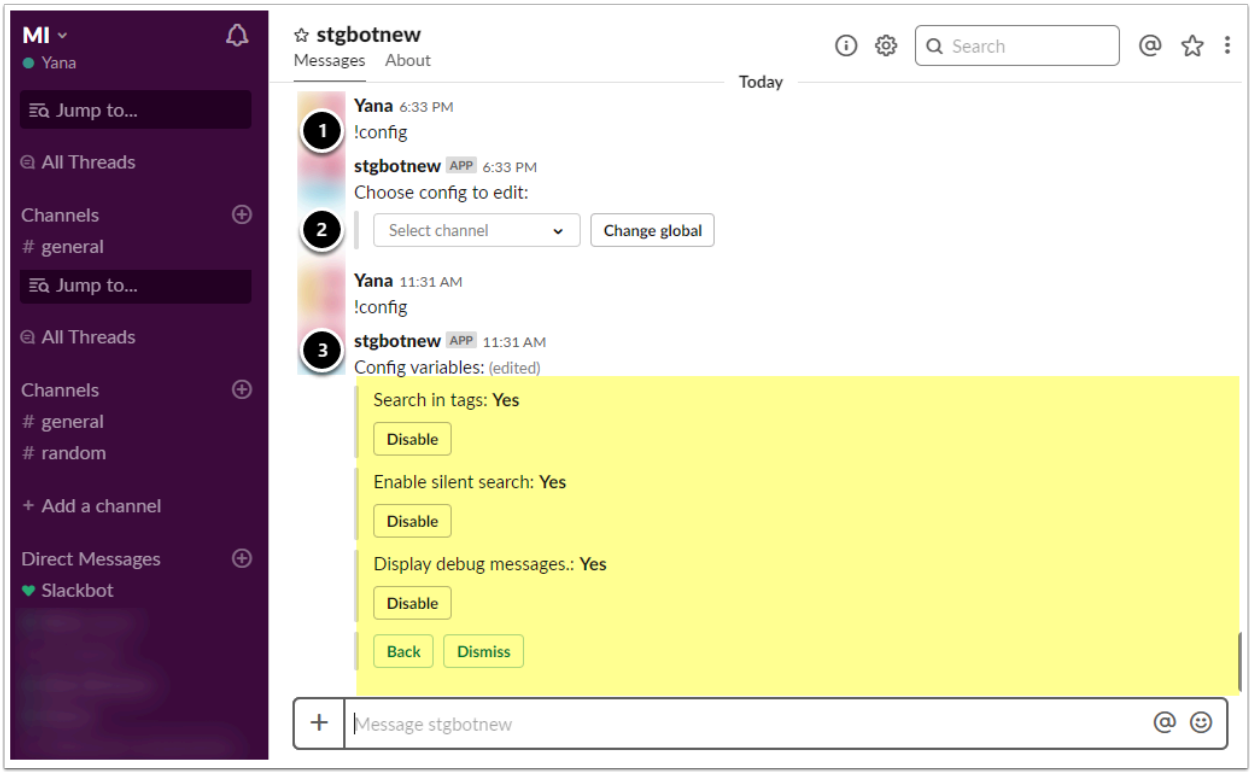
- "Search in Tags"
- "Search in Tile names"
- "Enable silent search"

Channel-specific variables can be configured via Direct Messaging with the MI Chatbot or when addressing the bot in a channel. In the latter case, these variables are not displayed in the channel but exclusively shown to the bot admin who initiated the change.

When Direct Messaging the MI Chatbot:

1. **Type !config** to access configuration variables
2. From the dropdown, **select a channel**
3. **Enable** or **Disable the variables** as required

Below is an example of channel-specific variables displayed in Direct Messaging with the MI Chatbot.



4. Slack: configure access with Default Groups

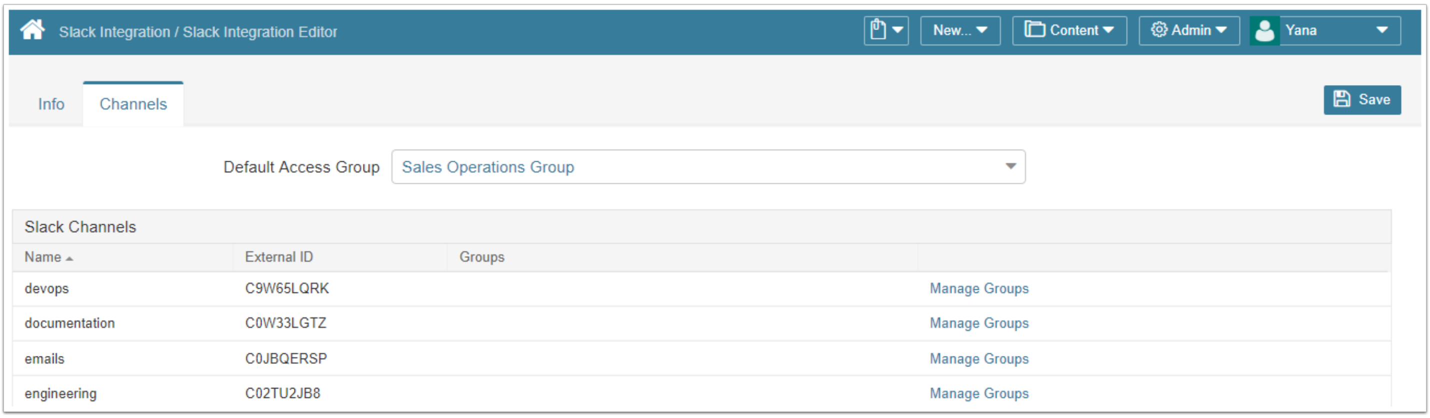
Slack Channel access to elements is determined by Group access in Metric Insights. The Channel will have the same access as an associated Group or Groups.

In Version 5.5.0, a new setting allows Users to specify the **Default Group** that will be used for access when the MI Chatbot is invited to a new channel.

If the **Default Access Group** is specified for Slack Integration in Metric Insights:

1. This Group is automatically assigned to a Slack channel as soon as the MI Chatbot joins that channel
2. Re-sync is performed automatically so that the MI Chatbot can be immediately used in the channel based on the assigned Group Permissions

For details on Security Provisions for Slack, go to [Slack Security and Access]



5. Slack: ability to send Bursts from the Burst Editor

Bursting options in the Burst Editor have been extended to include Slack Bursting. Delivering a Burst to a selected Slack channel is now only one checkbox away.

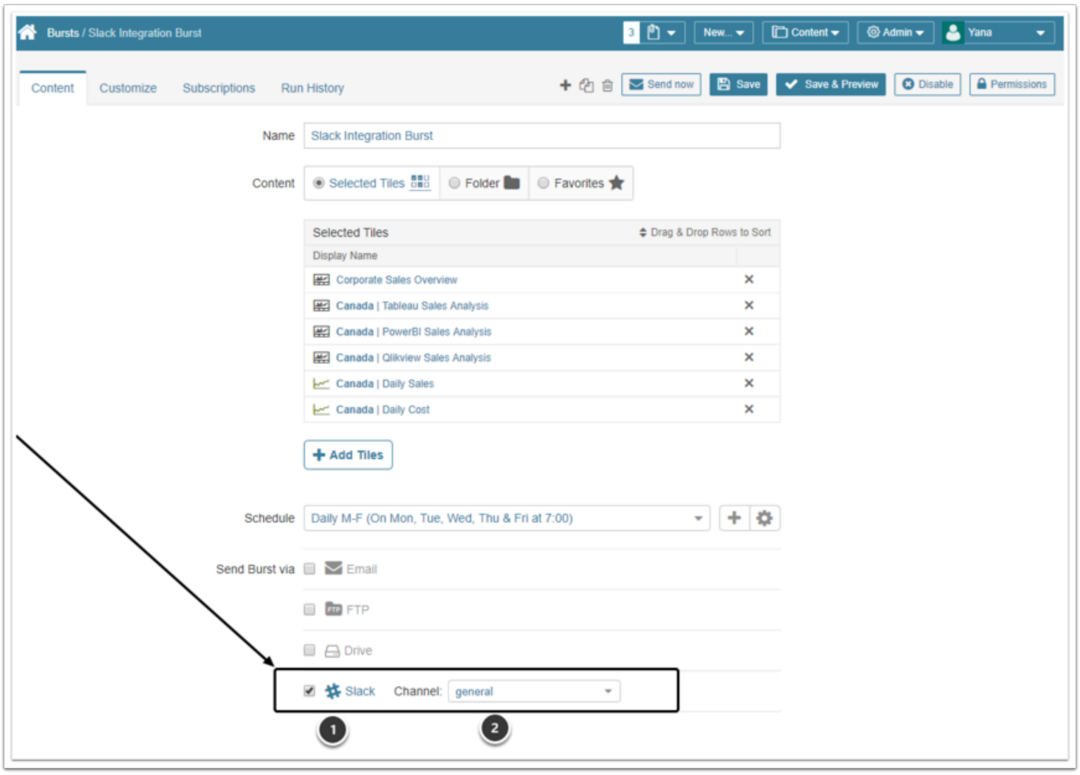
For Slack Bursting:

1. Activate the corresponding option **"Send Burst via" Slack** in the Burst Editor
2. Select a **Channel** where a Burst should be delivered

To learn more about the new simplified way to send Bursts to Slack, go to [Bursting to a Slack Channel]()

To know more about security settings controlling Slack Bursting, click [Slack Security and Access]()

> ⚠ Current security configurations do not allow sending a Burst to a private channel.



6. UI Changes and Performance enhancements

6.1. Microsoft Teams

User Interface

1. When a User is not allowed to view any Tiles, the corresponding message will be shown in the UI.
2. When a User tries to interact with the MI Chatbot that has not been added to a Team, they will notified with the corresponding UI message.

Administration

1. MI Chatbot can recognize uppercase commands (e.g, both !Sync and !sync will be interpreted correctly).
2. MI Chatbot can run the synchronization command for a single User.
3. After the MI Chatbot joins a Team, User and Channel will be reloaded automatically. The bot does not need to be restarted whenever either a Team or a Channel name is changed, Channels are created or removed, and the bot is added or removed from the Team.

Security

1. Authentication token is now kept in the local storage until it expires, allowing faster request processing.

6.2. Slack

User Interface

1. When a User has no tiles allowed, the corresponding message will be shown in the UI.

Administration

1. [5.5.1] Display Names have replaced Usernames in MI Chatbot user syncing commands as the @username concept is being phased out by Slack in favor of the more expressive and flexible Display Names.
   - For details, see A lingering farewell to the username