

# JUMP START GUIDE FOR REGULAR USERS



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# 1. Login to Metric Insights



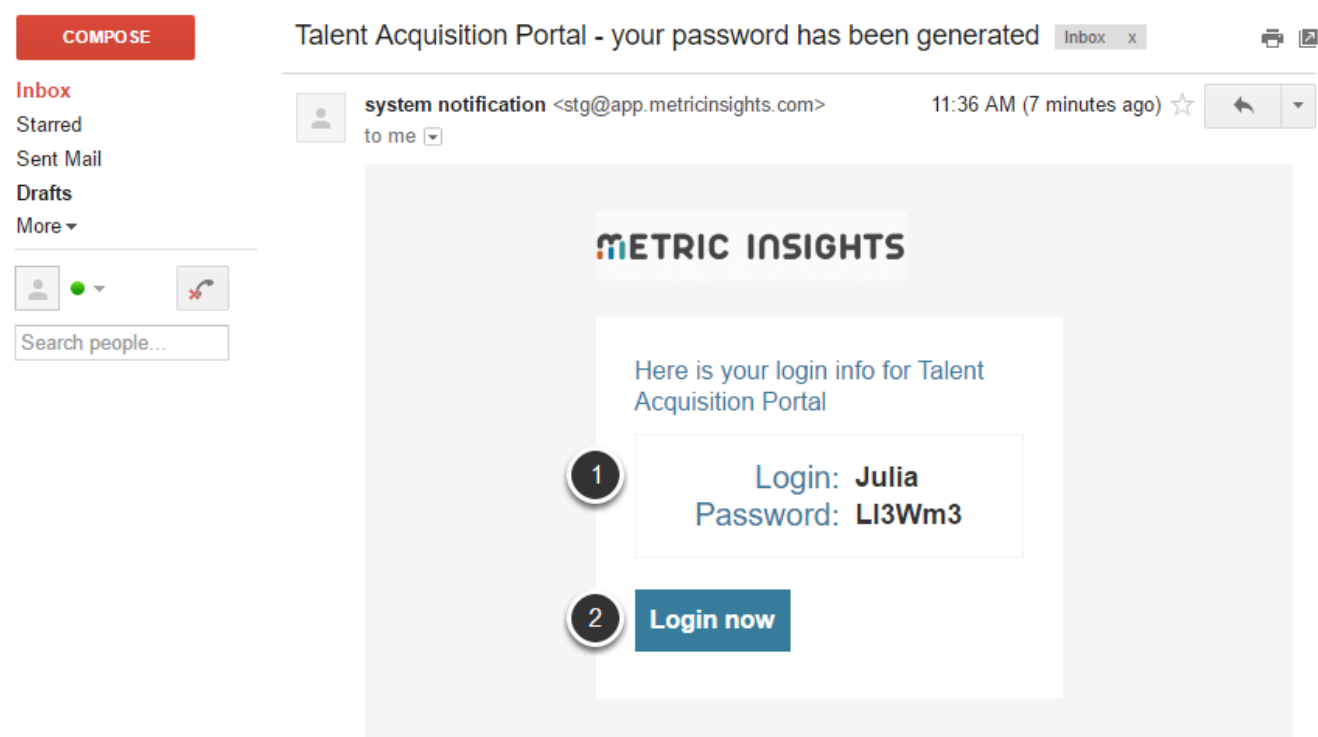
# 1.1 First Login Options

After the Administrator has set up your Metric Insights account, you will receive information about your account in one of the following ways:

1. A **System-generated e-mail** containing your Username, Password, and a link to the Metric Insights Login page.
2. A **communication sent directly to you from your Administrator**, (note, call, e-mail), containing a link to the Metric Insights Login Page, your Username, and your Password
3. Using **your corporate Single-Signon option**, i.e. LDAP or Active Directory

To view more detailed instructions on how to complete your first Login, see information below:

## 1. Login using a system-generated Email



- Once an account for you has been generated in Metric Insights, you are going to receive an email with Username and temporary password.
- Click **Login now** to start working with the system

**NOTE:** You are most likely going to be asked to change your password after the first login.

## 1.1. If you have been issued a temporary password, the system will display the 'Change Password' window

### Change Password

**Password\***

**Repeat New Password\***

*Your password must contain:*


- Length: at least 6 characters
- At least one numeric character
- At least one upper case character
- At least one lower case character


[Cancel](#) or [Save](#)

Enter your 'New Password' and the same value in the 'Repeat New Password' field.

## 2. Login using information from Administrator

### METRIC INSIGHTS

 Username

 Password

☒ Remember me

**Login**

[Recover password](#)

Instead of having the system send you a welcoming email, your Metric Insights Administrator may send you a personal email, provide a written/printed notice or make a phone call to you for the purpose of providing a link for you to access Metric Insights along with a Username and a Password that are either:

- Temporary and to be changed upon login
- Semi-permanent to be changed in the future at your discretion or according to your organization's policy

## 2.1. If you have been issued a temporary password, the system will display the 'Change Password' window

Change Password

**Password\***

**Repeat New Password\***

*Your password must contain:*

- Length: at least 6 characters
- At least one numeric character
- At least one upper case character
- At least one lower case character

[Cancel](#) or [Save](#)

Enter your 'New Password' and the same value in the 'Repeat New Password' field.

## 3. Login using single-sign-on account credentials

If your Metric Insights instance is configured to connect to your corporate single-sign-on system, you can use your existing LDAP or Active Directory credentials to access Metric Insights.

When Metric Insights is configured for single-sign on, it does not hold your password in its database. You are, therefore, not permitted to change or recover your Password using Metric Insights. You must follow the procedure established by your organization in order to change or recover your password.

**NOTE:** If you are logging in for the first time, your Homepage will reflect the content that is available to the Metric Insights user group that is mapped to your Single-Sign-On group. Contact your administrator if you need to require access to additional elements.

## 4. What would you like to do next?

- [Learn what I can do at the Homepage](#)
- [Set up My Preferences](#)

## 2. Homepage

## 2.1 Homepage Basics

The *Homepage* is the first page you see after log-in. It holds all elements that have been made available to you by your Administrator and that are pertinent to the performance of your organization.

The *Homepage* is arranged in two blocks, the **Left Sidebar**, and the **Main Panel**. The *Homepage* only contains those elements and Dimension Values that you have Permission to access.

There are also four different **Main Panel** options, as well as filter options that allow you to restrict the contents of the Main Panel as explained below.

This article covers:

- [Homepage Overview](#)
- [Where is my Version number](#)
- [Main Panel View Modes](#)
- [\[5.2.1\] Drag and Drop tiles into Favorites and Folders](#)
- [Basic Homepage Filter Options](#)
- [Info on Tiles](#)
- [How Preview works](#)
- [Homepage Message](#)

# 1. Homepage Overview

The screenshot displays the Metric Insights homepage. The top navigation bar includes a user profile for 'Julia', a search bar, and buttons for 'New...', 'Content', 'Admin', and a help icon. The left sidebar is numbered 1 through 5, corresponding to the following sections:

- 1 Show All**: A button to view all content.
- 2 My Content**: A button to view content owned by the user.
- 3 My Favorites**: A section containing 'Most Popular.', 'My Favorites', and 'My BI Content'.
- 4 Folders**: A section containing 'marketing update', 'Canada', 'Europe', and an 'Add Folder' button.
- 5 Categories**: A section containing 'Sales', 'Tableau', and 'Sub Categories'.

The main content area, titled 'My BI Content', displays a grid of dashboard tiles. The tiles include:

- Daily Sales from QlikView for France**: Shows a projected increase of +10% to \$1,424,170 as of Saturday 08/13/2016.
- Daily Sales from Tableau for France**: Shows a projected increase of +10% to \$1,424,170 as of Saturday 08/13/2016.
- Sales Dashboard (QS) for France**: A QlikSense dashboard.
- Sales Dashboard (QS) for Germany**: A QlikSense dashboard.
- Colorado Sales Revenue by Line Filtered**: A SAP Business Object dashboard.
- Denmark Daily Price (sum)**: Shows a decrease of -0.00% to 12,000 as of Wednesday 12/20/2017.

**LEFT SIDEBAR** includes a set of options for filtering the *Homepage* content. Selecting any of the filters or a Categories listed on the **Left Sidebar** limits the display of elements on the **Main Panel**:

- 1. Show All:** reveals all the content which a user has permission to access and which has been made visible on the *Homepage*.
- 2. My Content:** only those elements, where a user is designated as a Business or Technical Owner are shown. For details refer to: [Grant Users Element View and Dimension Access via Element Ownership](#)
- 3. Favorite Folders:** By holding the tiles that are of interest to you in favorite sections, you can easily access frequently used information and also receive email digests that provide a daily summary of all updates to your favorite tiles. For details refer to: [Working with Favorites and Digests](#)
  - Most Popular Folder:** This folder allows you to see what elements other Users are finding useful. This system-generated Folder is populated with the tiles representing those elements which either have been recently added to the favorite folders of others or were viewed by others within the last specified number of days. This calculation excludes the current User. This Folder name should never be changed.

The default number of tiles shown in this folder is 5, but you can increase it at *Admin > Utilities > Config Variables > MOST\_POPULAR\_FOLDER\_TILE\_COUNT*.

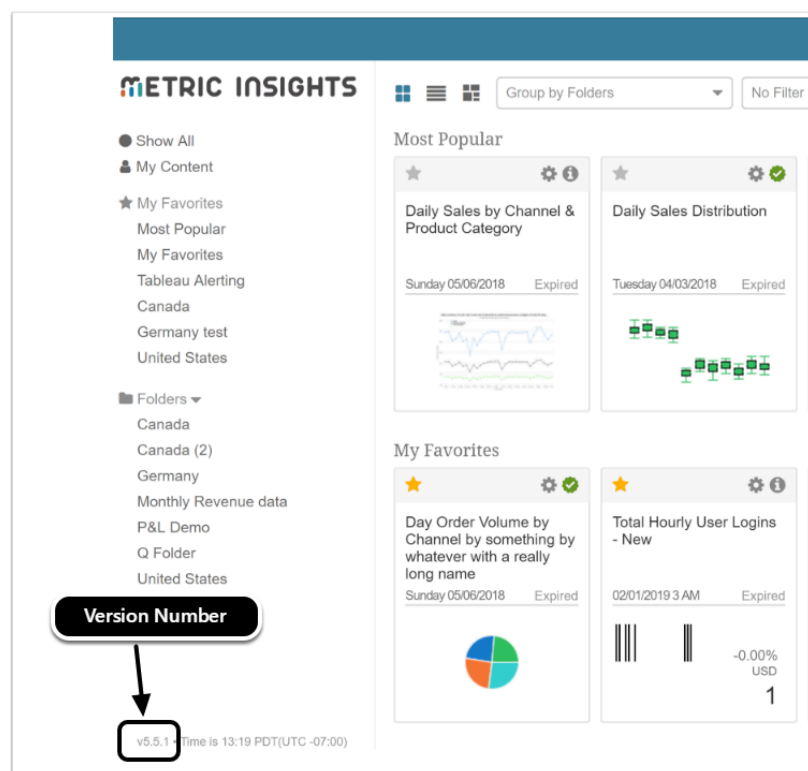
The amount of days to consider while scoring the "Most Popular" folder can be defined at *Admin > Utilities > Config Variables > MOST\_POPULAR\_FOLDER\_VIEW\_DAYS*.

4. **[5.2] Folders:** New in 5.2, these system Folders were added to combine the functions of Shared Folders and Bursting in one place. For more information, see [Understanding Folders](#)
5. **Categories:** Categories are used to group tiles and grant bulk access to Users or Groups. For details refer to: [Create a Category](#)

**MAIN PANEL** includes all Metrics, Multi-Metrics, Reports and External Reports that are made visible on the *Homepage* and to which you have access.

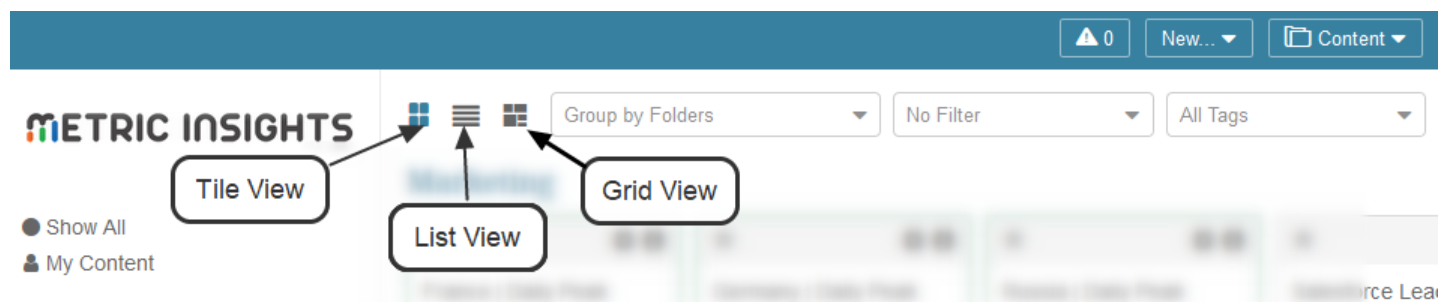
- i** [5.2.1] Allows Users to omit the Category section from their Homepage to reduce clutter, if desired. This option is set in the My Settings section for each individual User. See [My Settings \(aka 'Preferences'\)](#)

## 2. Where is my version number?

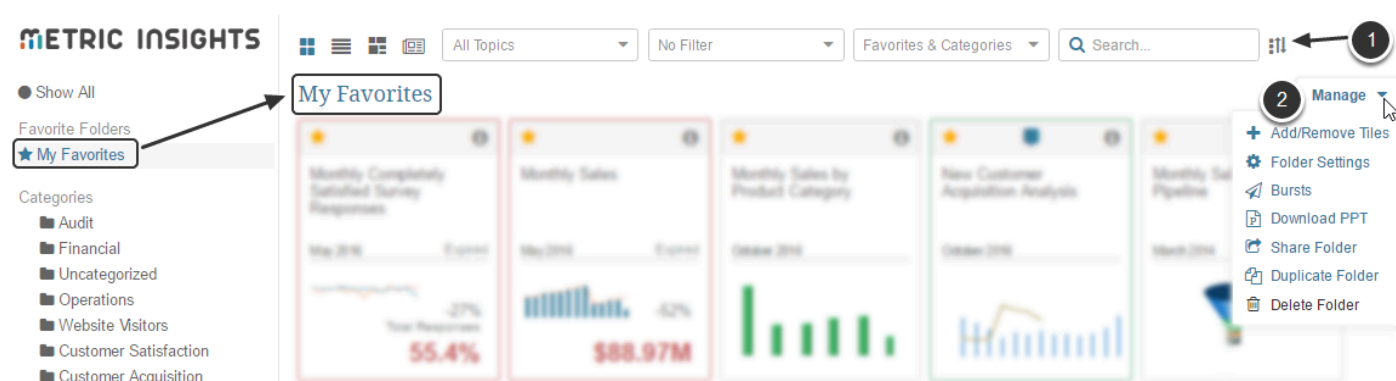


## 3. Main Panel View Modes

There are 3 distinct views to choose for the Main Panel display but one is only for Favorites folders.



### 3.1. [Tile View] thumbnail images, current values, and icons for various collaborative items



This is the original display format for Metric Insights, with the following features available for Favorite folders:

1. Click this icon to **Re-order elements**
2. **Manage** Favorites allows you to change Favorite options without leaving the *Homepage*



A tabular view of your elements that allows you to quickly scroll through current values, Alerts, and changes.

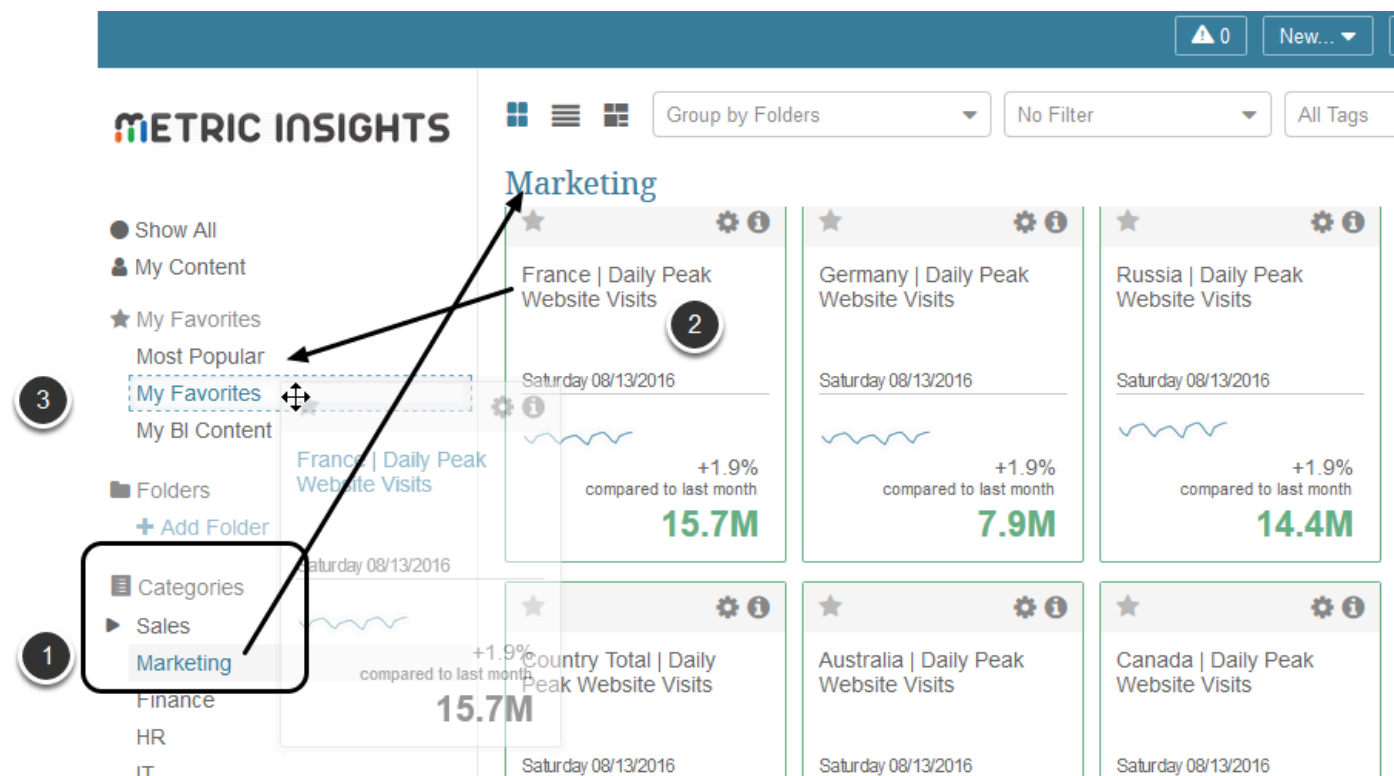
### 3.3. [Grid View] available only for Favorite Folders (obsolete in newer versions)

The screenshot displays the Metric Insights application interface in Grid View. The top navigation bar includes a user profile for 'Julia' and a 'New...' button. The left sidebar shows a navigation menu with 'My Favorites' selected, highlighting 'Most Popular'. The main content area is titled 'Most Popular' and contains seven data tiles arranged in a grid. Each tile displays a title, a date, a line chart, and a numerical value with a percentage change compared to the previous day.

Title	Date	Value	Change
Canada   Sales Dashboard	Monday 03/05/2018	\$332,805	+0.06% compared to yesterday
SMS Template	Monday 03/05/2018	\$590,607	-2.2% compared to yesterday
Australia Product Category Total Daily Sales	Sunday 03/04/2018	\$521,890	-20% compared to yesterday
Australia   Daily Sales	Saturday 08/13/2016	\$8,170,816	-4.2% compared to yesterday
Canada   Daily Sales	Saturday 08/13/2016	\$491,549	+11% compared to yesterday
Country Total   Daily Sales	Saturday 08/13/2016		
Spain Product Category Total Daily Sales	Sunday 03/04/2018		

Similar to the Tile View, but the Filters and Search options are removed.

### 3.4. [Version 5.2.1] Drag and Drop tiles to Folders and Favorites



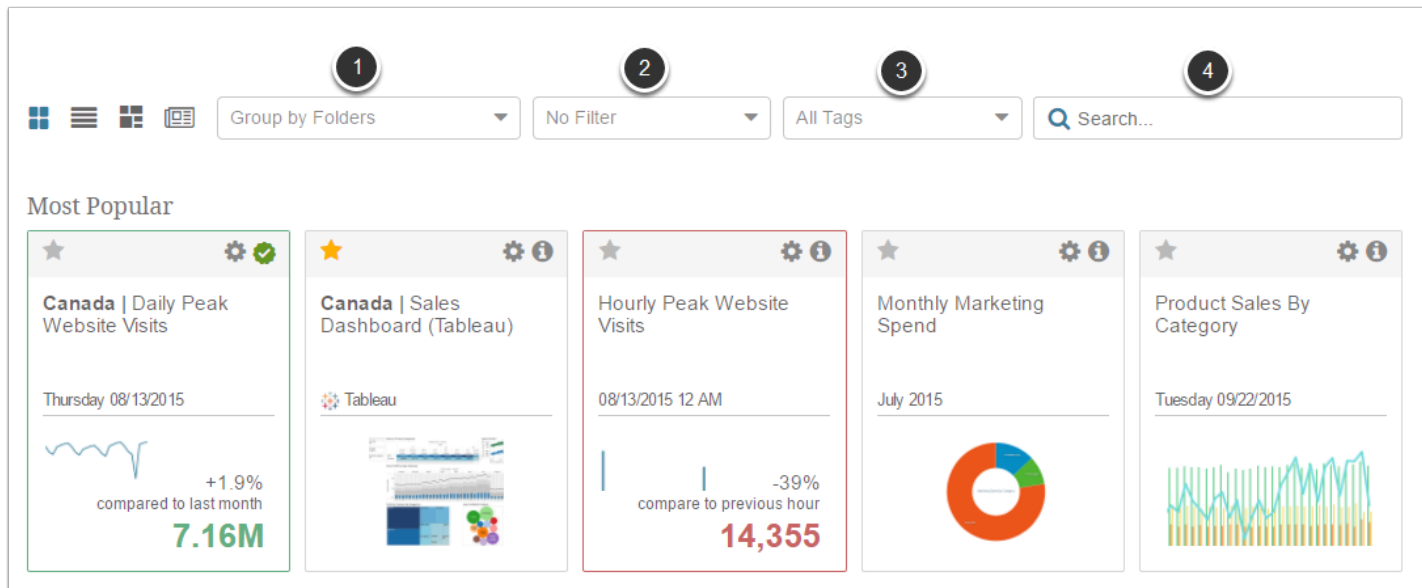
In image above, we are copying a tile from the Marketing Category to My Favorite Folder.

1. We do this by selecting the Category to display it's Tiles on the Main Panel.
2. Then drag the tile into the Favorite folder.
3. The Folder you are dragging into will be indicated by a dotted square.

- To **move** a tile between Favorites and Folders, simply Drag and Drop the tile to the right-hand Favorite or Folder
- To **copy** a tile from a Favorite to a Folder (or vice versa), hold the Shift button while performing the Drag and Drop
- You are only able to **copy from** a Category to a Folder or Favorite. You cannot move or copy tiles between Categories; Category is set in the element's Editor.

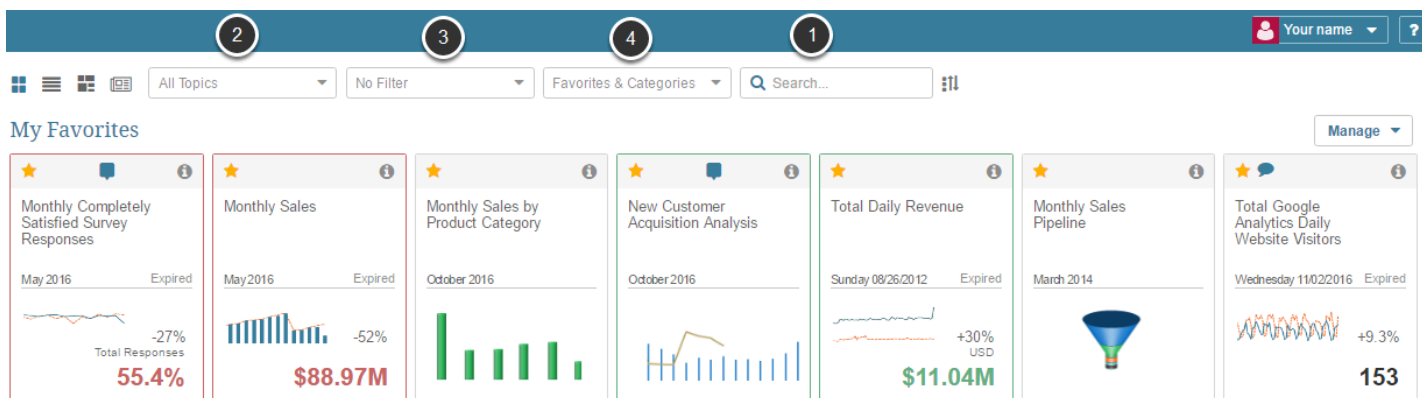
## 4. Basic Homepage Filter Options

### 4.1. [Version 5.1]



1. **Grouping options:** Homepage content can be group by different criteria: by Folders (represented by the Favorites and Categories from the Lift Sidebar), by Update Frequency, by Measurement Interval, etc.
2. **Filtering options:** by Content Type (Metric, Report, External Report), Report Type, Stoplight (Performing, Underperforming), Area, etc.
3. **Tags:** provide a useful way to group related elements by a common characteristic. For more details refer to: [Create a Topic / Tag](#)
4. **Search:** by keywords in name or description.

### 4.2. [Versions prior to 5.1]

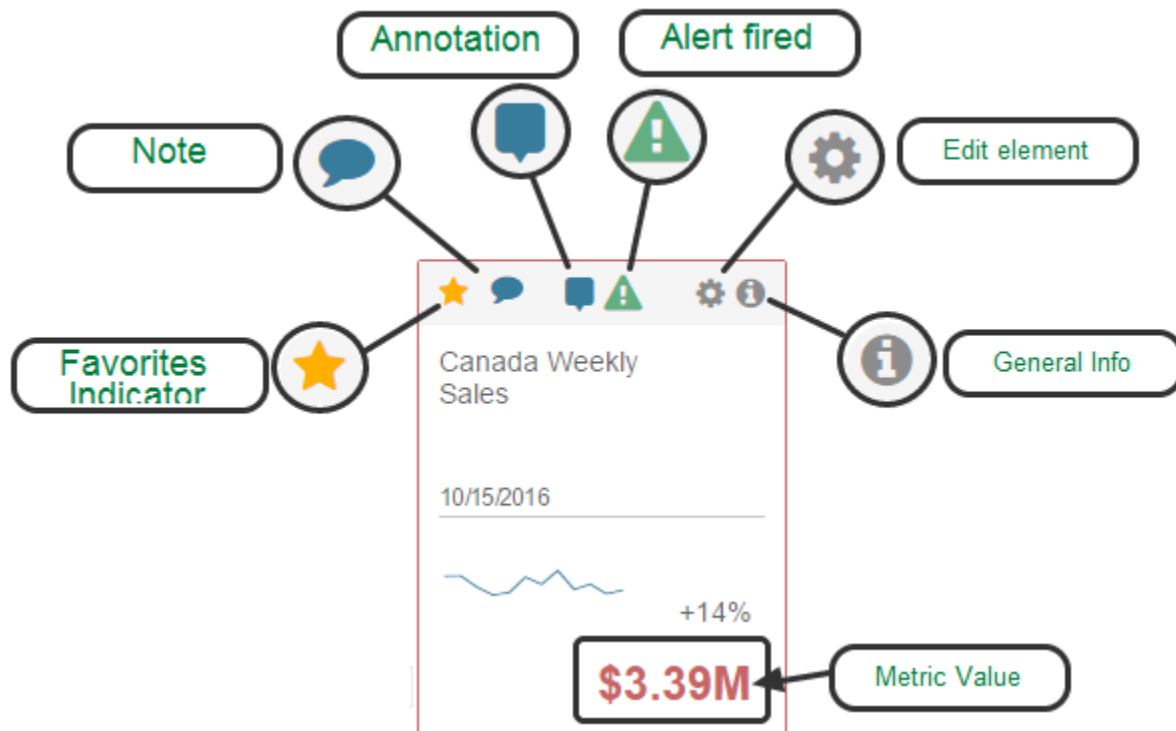


1. Highest Level filter is **Search** by name or element description.

2. Limit your display or search by **Topic** (Sales, Orders).
3. Limit display or search using **Filter** (by specific items/dimensions/element type).
4. You can **Group** the display of Homepage elements (Homepage, Stoplight value, Measurement Interval) - example is by 'Homepage'.

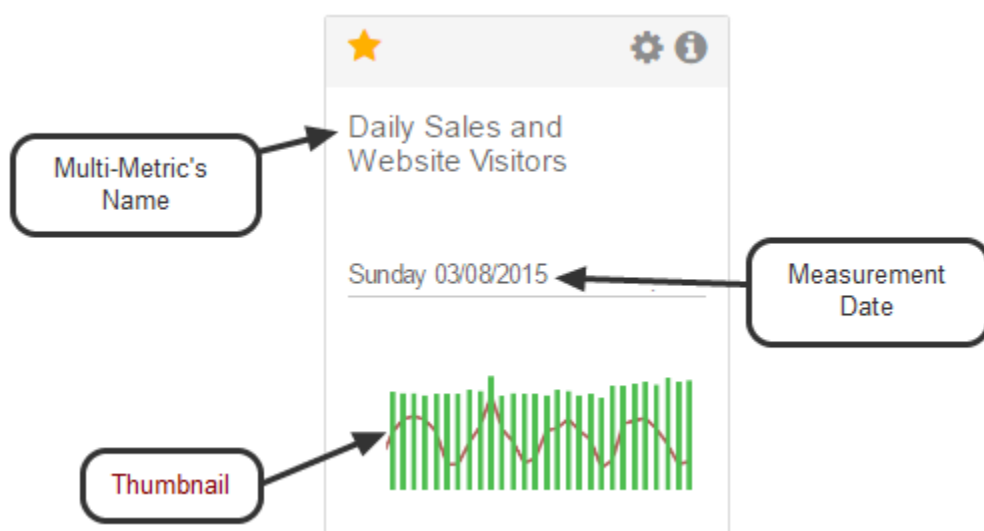
## 5. Quick info on tiles

### 5.1. A Metric Tile



A Metric is a measure that contains a single value for any point in time and that is measured over time. An example of a Metric is "Daily Sales"

## 5.2. A Multi-Metric Tile



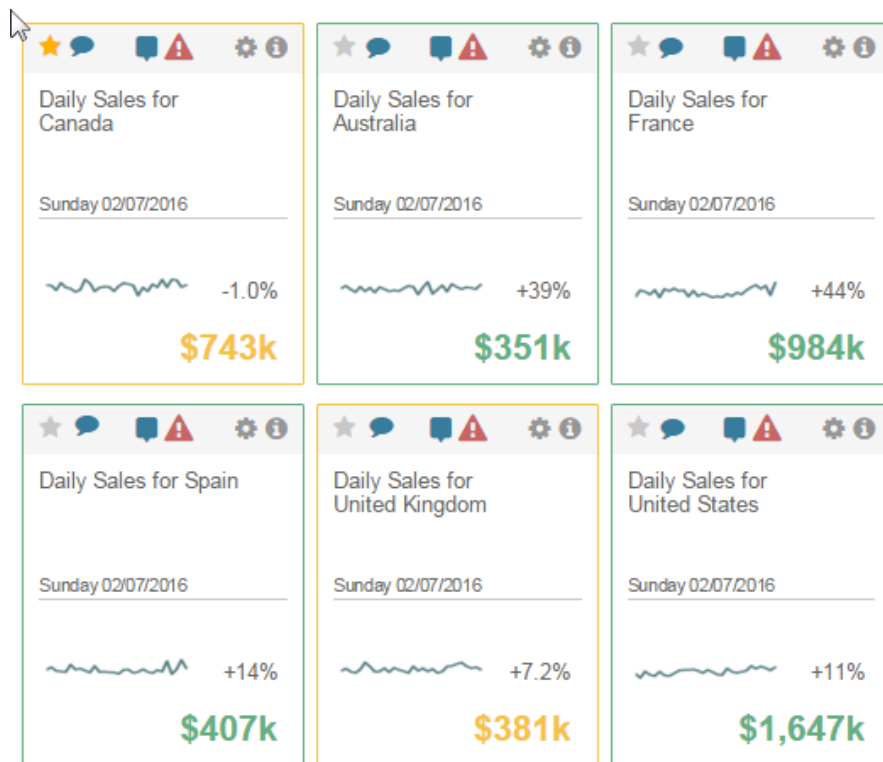
A Multi-Metric is a chart containing several trend lines and combining more than one measure to allow you to compare each Metric's individual trend line. The person whom defines the Multi-Metric chooses at least two previously defined Metrics to be charted by the system on the same graph in order to better understand how the various Metric trends related to each other.

## 5.3. A Report Tile



A Report typically includes tabular data and one or more charts based on data selected by the person creating the element. The **Effective Date** of the Report is not the same as the date on which the report is run. This date represents the report's "As of" date.

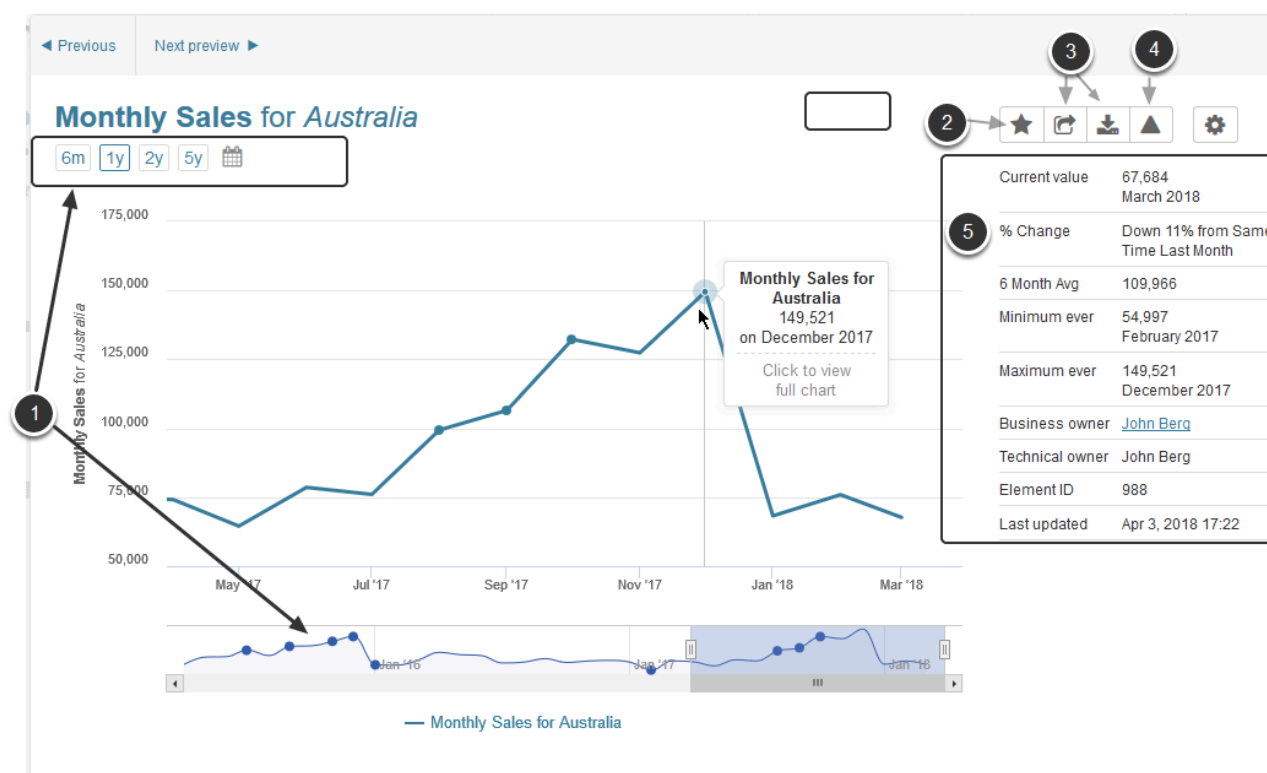
## 5.4. Dimensioned Element's Tiles



If the Element is defined as **Dimensioned**, there is a tile for each **Dimension Value**. In this example, Daily Sales is dimensioned by **Country**.

**NOTE:** As noted above, you only see tiles for the **Dimension Values** for which you have Permission to access.

## 6. Anatomy of Preview (Metric example)



Single-clicking on any tile opens a *Preview* pop-up or, if previewing is not enabled, a *Full Chart* view. Double-clicking on the tile or single-clicking on the *Preview* always opens the larger chart view (Live view).

1. You can alter the display period on the **Preview** by selecting a time frame or **Range Selector** below the Chart
  1. [5.2.1] Previews in newer Versions are completely interactive in the same manner as Full Viewers
2. Element can be added to **Favorites** folder by clicking the **Star** icon
3. You can manage **Alert Subscription** for this element
4. Data can be **Shared, or Downloaded** in a variety of formats, such as Excel and PDF files
5. **Statistics summary information**



## 7. Homepage Message

The screenshot shows the Metric Insights homepage. At the top is a navigation bar with buttons for 'New...', 'Content', 'Admin', and a user profile for 'Alex'. Below this is a filter bar with 'All Topics', 'No Filter', 'Favorites & Categories', and a search bar. A red-bordered announcement box at the top reads: **Announcement:** Metrics with expired manual data should be updated by the end of the week.

Below the announcement is the 'My Favorites' section, which contains a grid of five metric cards. Each card has a star icon, a title, a date, an expiration status, a small chart, and a numerical value.

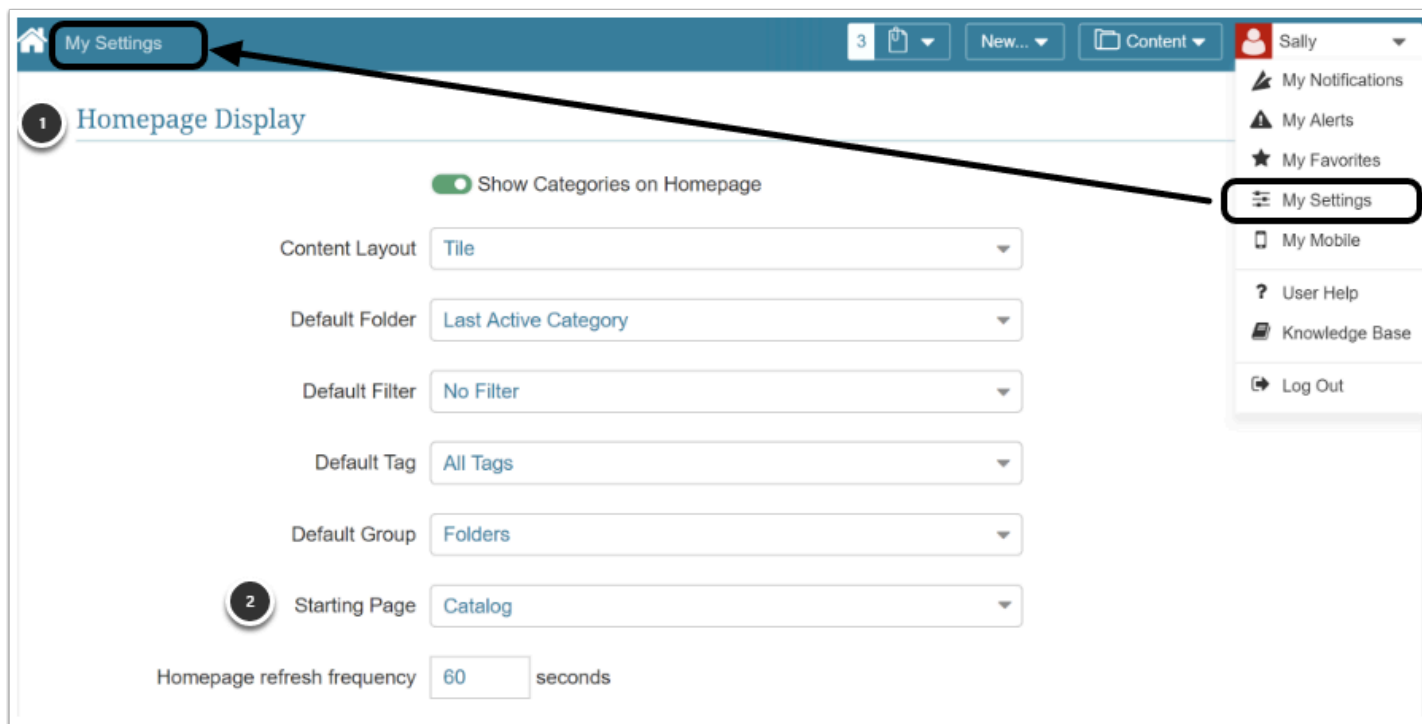
Metric Title	Date	Status	Value
% Monthly Projects On Track for Finance	October 2011	Expired	0
Daily Units Sold	Friday 07/22/2016	Expired	149,032
Daily Order Unit and US\$ Volume	Friday 07/22/2016	Expired	
Daily Sales - Enabled	Sunday 03/08/2015	Expired	\$5.87M
Home Price and Supply			

To learn how to add a message displayed either for everyone or for a specific group of users (Admins, Power Users or Regular Users) at the top of the *Homepage*, see [Creating a Homepage Message](#)

**i** [5.4.0] The Homepage Message has been replaced by the more feature-laden Announcements function - see [Creating an Announcement on Homepage or Element Viewers](#)

## 2.2 Setting a Portal Page as your Start Location

### 1. Access "My Settings" in the menu under your Username



1. Scroll to the **Homepage Display** section
2. **Starting Page** is set to "*Catalog*" by default

## 2. Open drop-down and select a Portal Page

Homepage Display

☒ Show Categories on Homepage

Content Layout Tile

Default Folder Last Active Category

Default Filter No Filter

Default Tag All Tags

Default Group Folders

Starting Page Catalog

Catalog

External Sales

Marketing Operations

💡 Only those **Portal Pages** that you are permitted to access will be displayed.

## 3. Scroll to bottom and Save your changes

Report Viewer

Max data table display lines 20

Data Entry Preferences

☒ Warn me when I attempt to leave a page that has pending changes

☐ Always open Editors in Advanced Mode

→ Save [Restore defaults](#)

## 2.3 Setting Home Page to always open to Same Section

Metric Insights will remember the section that was last opened on the Home Page between logins, but if you want to always start new sessions in the same section, you can do so with the 'Default Folder' setting in your *My Settings Editor*.

### Access "My Settings" in the menu under your Username

My Settings

My notifications are ON for emails, SMS and Phone Alerts · Wednesday - December 12, 2018 System 01:40 L

Notifications Alerts Favorites **Settings** Mobile

Profile picture [Load new picture](#)

Username Anna

First name

Last name

Email address

**1** Homepage Display

☒ Show Categories on Homepage

Content Layout

**2** Default Folder

Default Filter

Default Tag

Default Group


Starting Page Catalog




Homepage refresh frequency  seconds

Scroll to the Homepage Display section

**Default Folder** is set to "*Last Active Category*" by default

# Open drop-down and select any other Category or Folder

 My Settings

  New...  Content

## Homepage Display

☒ Show Categories on Homepage

Content Layout

Title

Default Folder

Last Active Category

Last Active Category

Default Filter

All Categories

Default Tag

Canada

Default Group

Germany

Starting Page

Most Popular

Homepage refresh frequency

- Europe

- monthly data

- North America

- Others

- weekly

Canada Revenue & Profit

My Countries

## 2.4 Homepage search: how it works

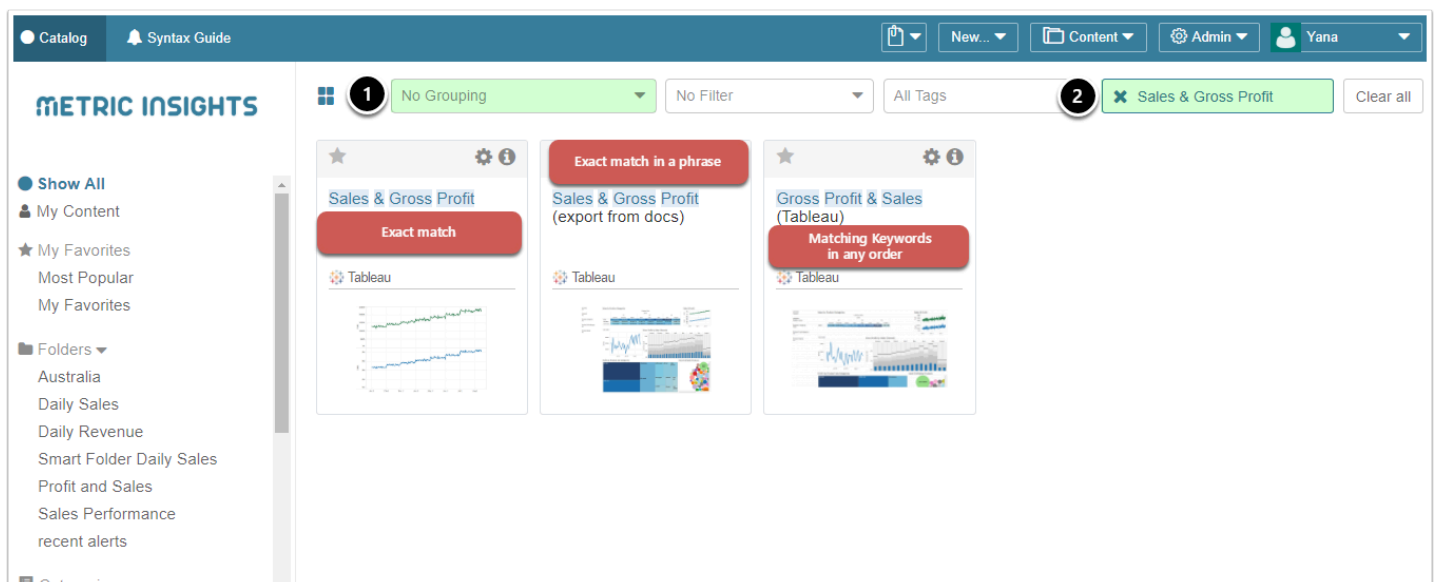
On the Homepage, Users can search and find elements by:

- **Name** (*visible or hidden elements*)
- **Description** (*visible or hidden elements*)
- **Tag** (*only visible elements*)

### Search by relevance (no grouping)

If the performed search generates multiple results, they will be displayed according to keyword relevance in the following order:

1. **Exact word match** (*Display Priority 1*)
2. **Exact word match as part of a search phrase** (*Display Priority 2*)
3. **Matching keywords in any order** (*Display Priority 3*)



1. **No Grouping:** choose this option to display Tiles by relevance priority only
2. Enter your **search phrase**

## Search by Relevance (Folder Grouping example)

The Grouping option affects how search results are rendered on the Homepage.

When search results are displayed:

1. **Grouping** takes priority
2. Search results are displayed by their level or relevance **within arranged Groups**

*View details in the image below.*

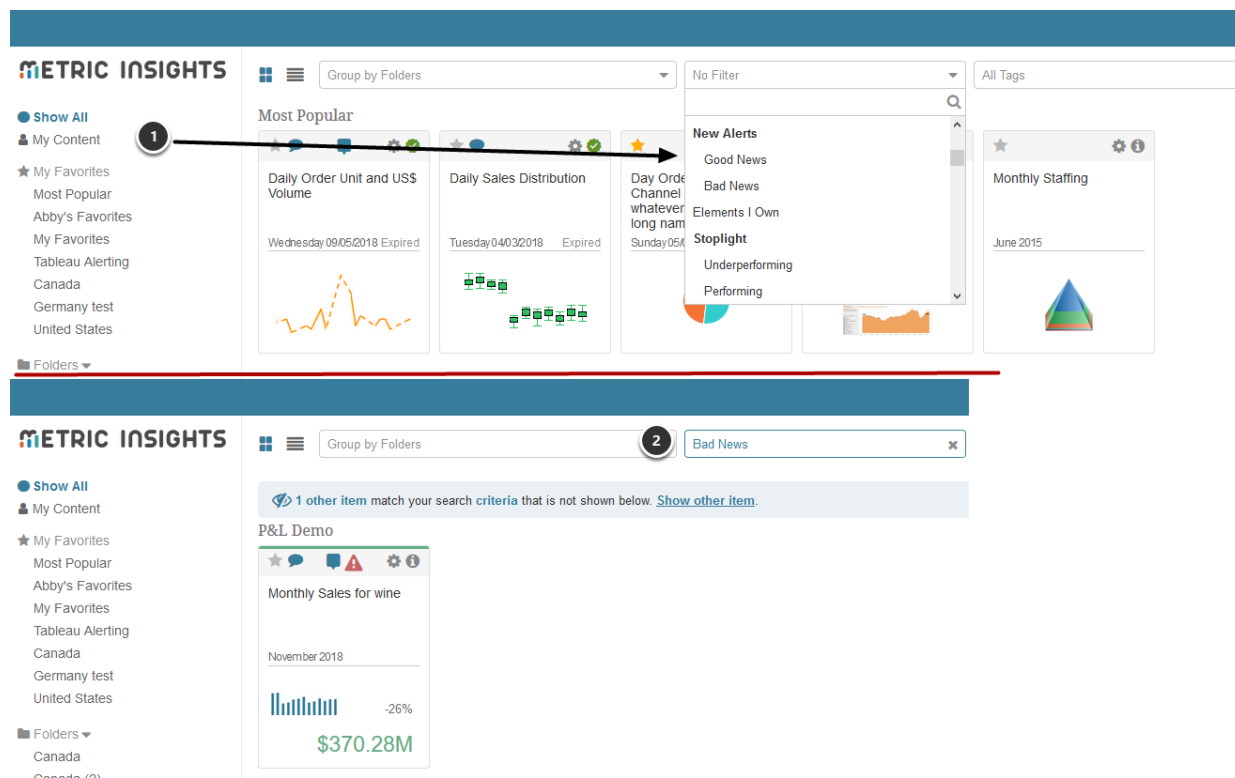


1. **Group by Folders:** if activated, display priority is first given to Folders (arranged alphabetically) and then to search relevance
2. Enter your **search phrase**

## 2.5 How do I filter Home Page content by Good news/Bad News?

You can filter your *Home Page* to only see Elements with **Alerts** that are green or red; i.e., "Good News" or "Bad News". On your *Home Page* the **Filter By:** drop down list will show entries for these options **ONLY IF** you have current **Alerts** set to show in your Browser and results meet the Alert's criteria.

### 1. Open Filter drop-down



1. Below **New Alerts**, select either "Good News" or "Bad News"
2. After selecting "Bad News", only the tile for the "Monthly Sales for wine " displays

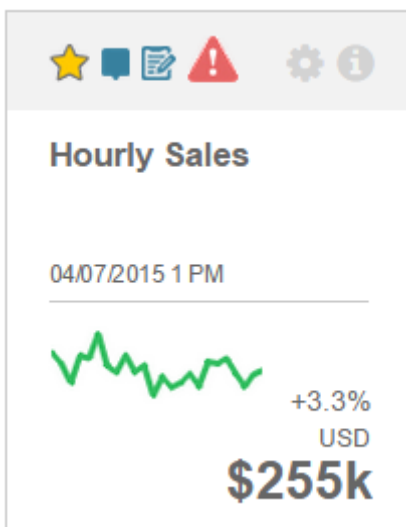


## 2.6 When do flags appear and get removed from tiles on my home page?

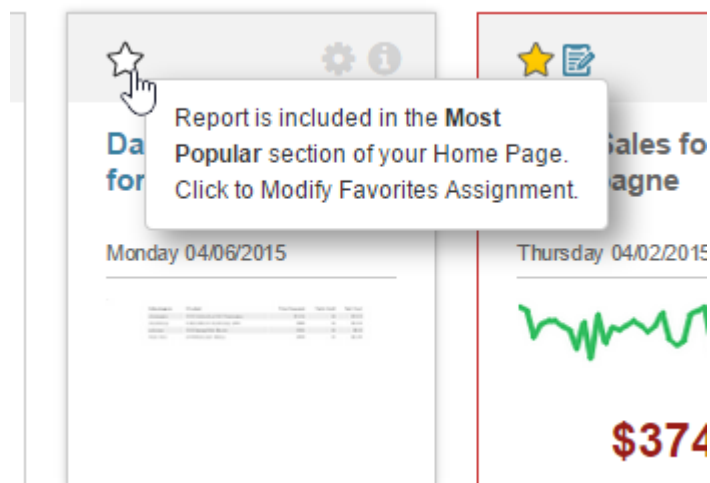
The tile images on your Home Page display various icons to notify you of recent changes and additions to your data. Hovering over these icons display additional information.

Additional, the various icons have different rules for removing these symbols from the Home Page so that you are only notified on the most recent or unseen data changes. For the same reason, you will never see icons / hover-overs for commentary that you add, only those contributed by others.

### The Icons - an overview



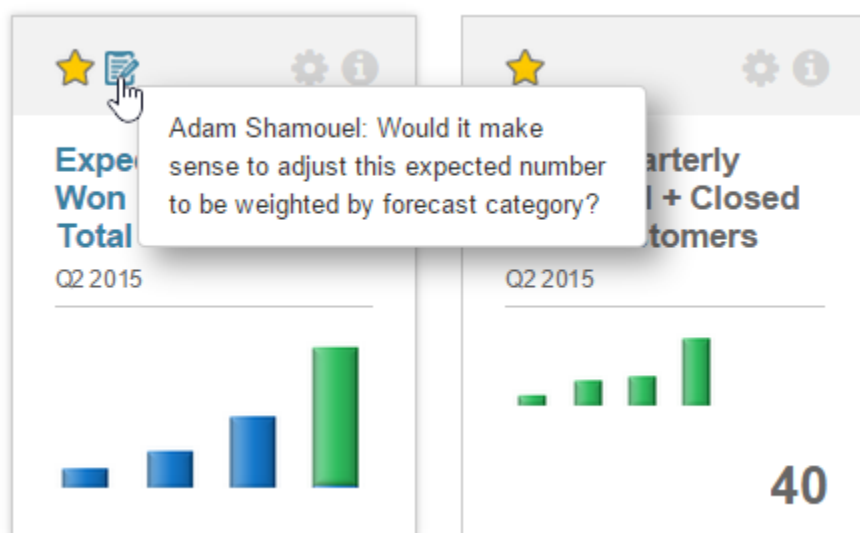
## Gold star icon indicating a Favorite element



Star will remain gold until element is removed from all Favorite folders.

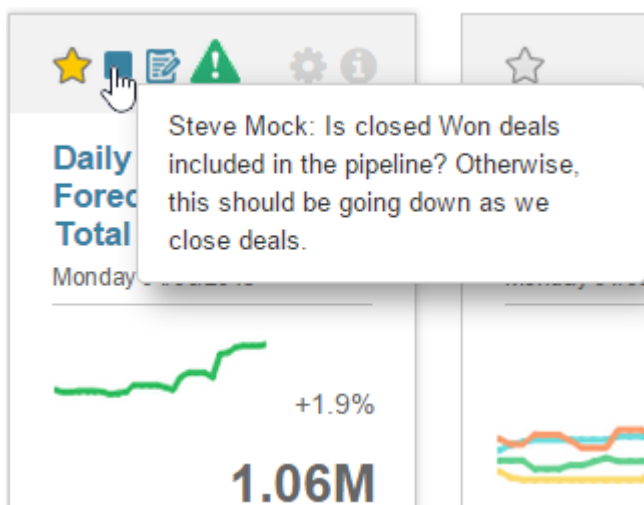
Exception: The 5 most viewed elements are automatically added to 'Most Popular' folder and Users cannot alter or remove these

## Notes and Commentary icons



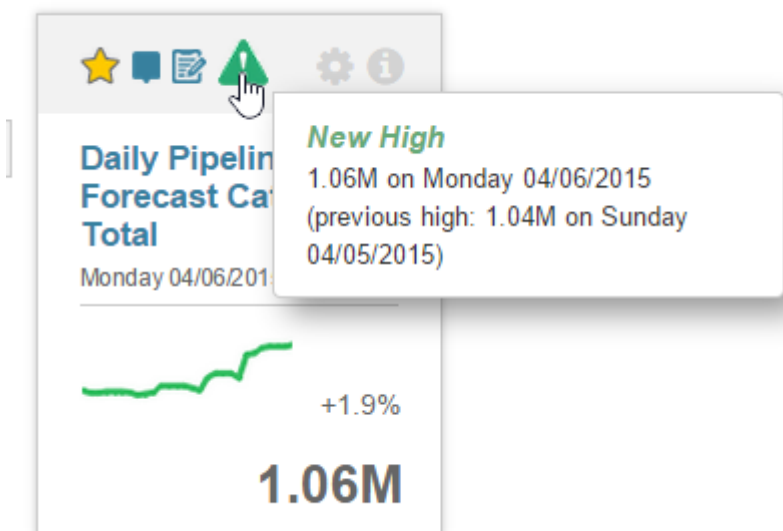
The most recent **note** is displayed, unless you wrote the most recent one, for as long as the associated data point(s) displays in the chart measurement interval. The most recent **Expert Commentary** will display on hover-over, unless you wrote it, until it is deleted.

## Annotation icons



The most recent annotation will be displayed unless you wrote it. The icon will be removed from the tile when you view this hover-over or view the annotation in the Element Viewer. After viewing, the annotation icon will remain on the *Element Viewer* and *Collaborative View*, but the icon will be removed from the Tile View

## Alert icon

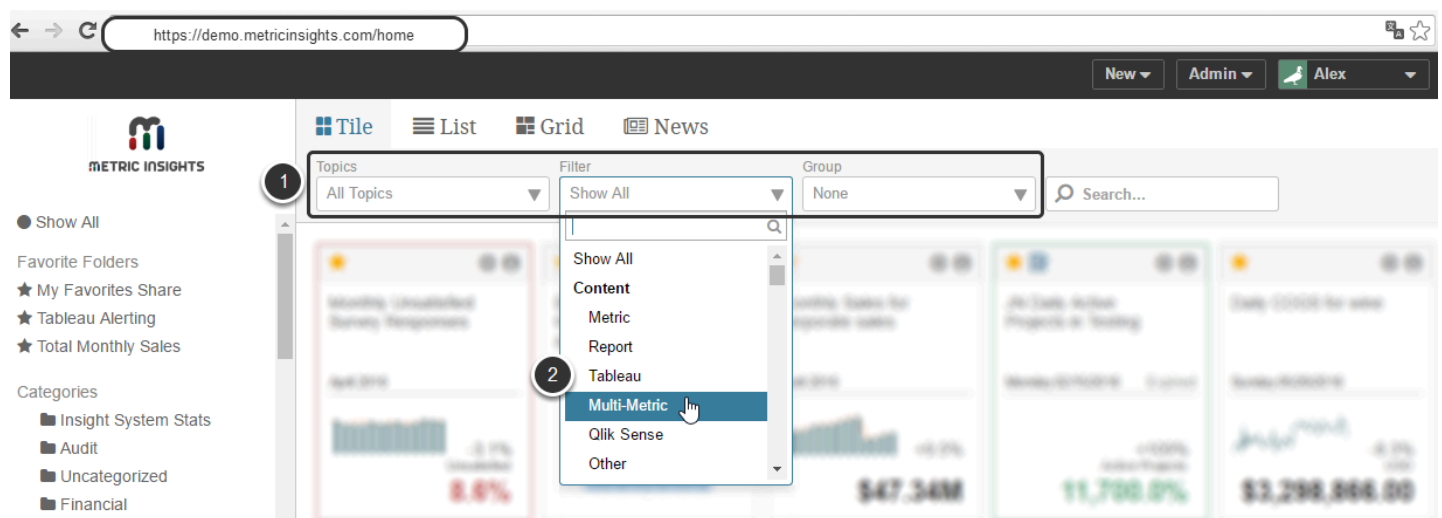


The most recent **alert** will display on hover-over. After you view this alert detail via this hover-over or by viewing the element, the icon will be removed from the *Tile View*: the icon will remain on the *Element Viewer* and *Collaborative View*,

## 2.7 Controlling Homepage Display through the URL

This article describes how to utilize the available options to customize the content filtering on the *Homepage* display. **NOTE:** The format of the *Homepage* is slightly different in Version 3.

### 1. Select Display based on Filter(s) by select list(s)



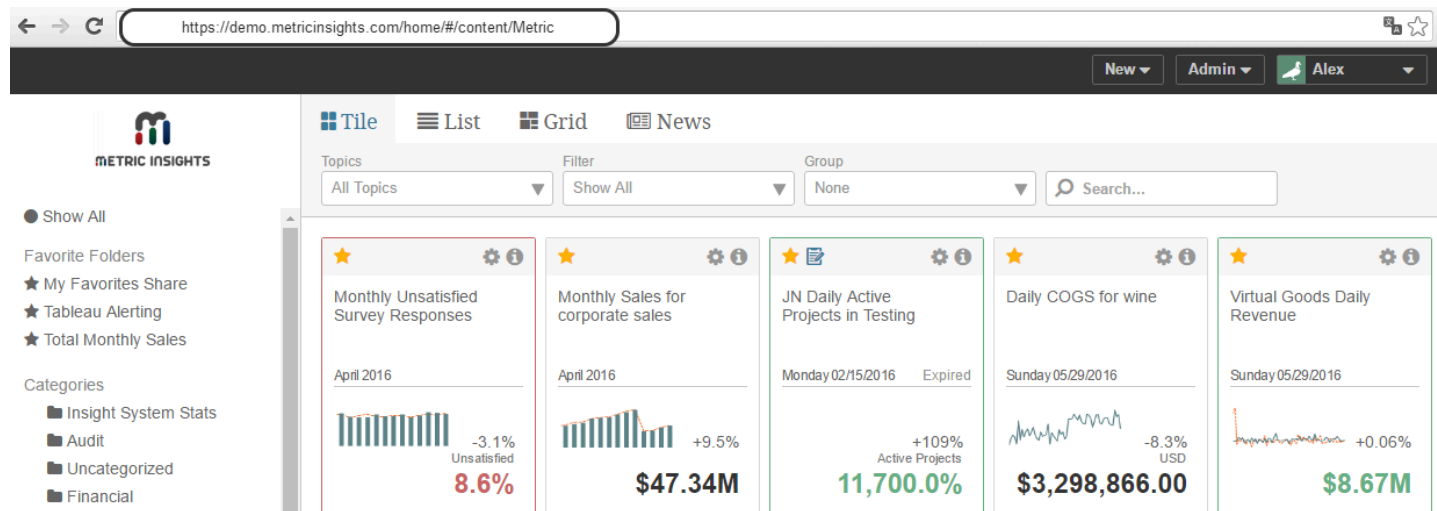
1. You may limit the tile display at the *Homepage* by configuring page filters in **Category**, **Topic**, **Filter by** and **Group by** drop-down lists.
2. In this example, we filter the content to only show Multi-Metrics for all Topics and no specific Groups

### 2. Use Hashtags in URL

Hashtags may be embedded in the URL to filter by **Category** (name or ID), **Element Type** (or a combination of the two) or for Favorite Folders.

**NOTE:** Currently the options of **Topic** and **Group** are not supported.

## 2.1. Single Filter for Element Type



Required URL parameters are:

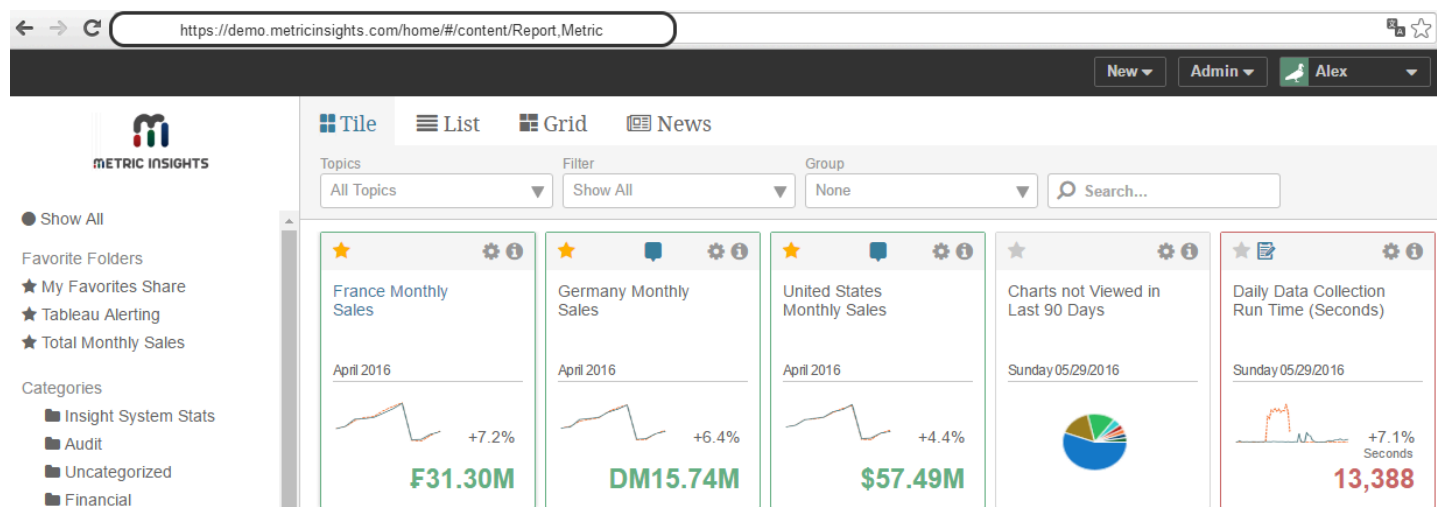
`https://yourMetricInsightsInstance.com/home/#/content/ElementType`

- **ElementType** = Metric, Multi-Metric, Report, External Report

**Example:** Filter the *Homepage* content based upon Elements of a 'Metric' type by modifying the URL to:

`https://demo.metricinsights.com/home/#/content/Metric`

## 2.2. Multiple Filter Selection for Element Type



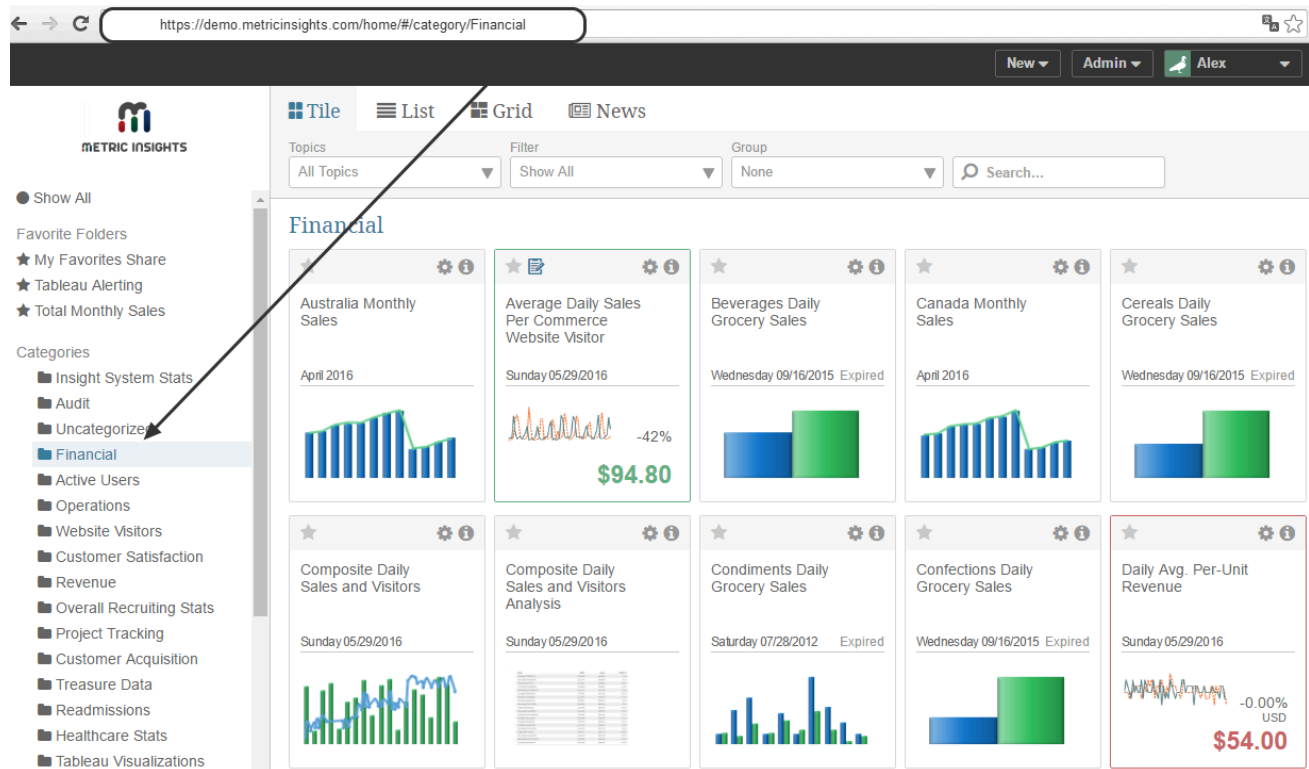
Required URL parameters are:

<https://yourMetricInsightsInstance.com/home/#/content/CommaSeparatedElementTypes>

**Example:** Filter the *Homepage* content based upon Elements of a 'Metric' and 'Report' types by modifying the URL to:

<https://demo.metricinsights.com/home/#/content/Report,Metric>

## 2.3. Single Filter for Category Name or ID



Required URL parameters are:

<https://yourMetricInsightsInstance.com/home/#/category/CategoryName>

**Example:** You may filter the *Homepage* content by a specific Category with the name 'Financial' by modifying the URL to:

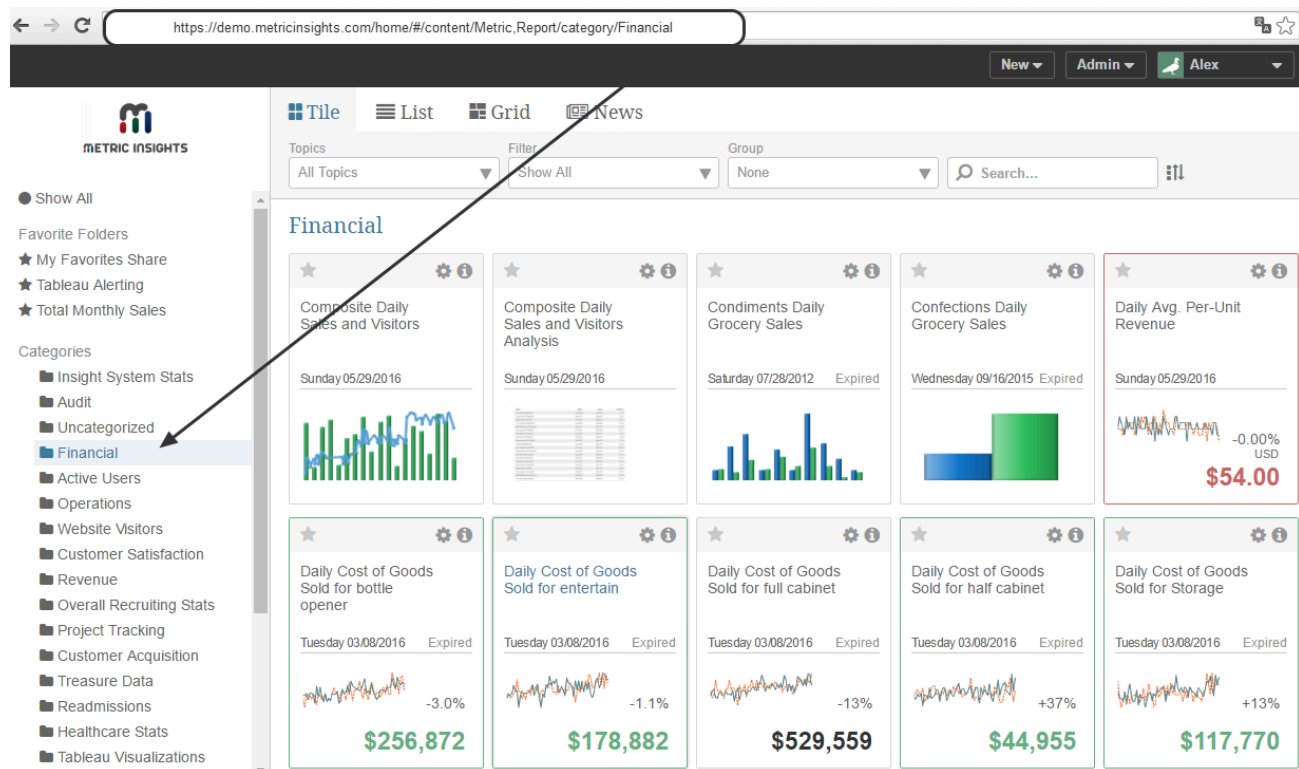
<https://demo.metricinsights.com/home/#/category/Financial>

Alternatively, you can filter the Category by it's ID rather than name by modifying the URL to:

<https://uma.metricinsights.com/home/#/category/24>

**NOTE:** Both methods will return the same result set.

## 2.4. Combining Element Type and Category Filters



A combination of Element Type and Category Name filters may also be used. Required URL parameters are:

```
https://yourMetricInsightsInstance.com/home/#/content/CommaSeparatedElementTypes/
category/CategoryName
```

OR

```
https://yourMetricInsightsInstance.com/home/#/content/CommaSeparatedElementTypes/
category/CategoryID
```

**Example:** Filter based upon the 'Metric' and 'Report' Element Types as well as the 'Financial' Category by modifying the URL to:

```
https://demo.metricinsights.com/home/#/content/Metric,Report/category/Financial
```

## 2.5. Open Favorite Folder via a link

The screenshot shows the Metric Insights web application. The browser address bar displays the URL: `https://demo.metricinsights.com/home/#/favorite/Total Monthly Sales`. The top navigation bar includes a 'New' button, an 'Admin' dropdown, and a user profile for 'Alex'. The main interface features a sidebar on the left with a 'Show All' button and a 'Favorite Folders' section. In this section, 'Total Monthly Sales' is highlighted with a blue bar and a star icon. An arrow points from this folder name to the main content area. The main content area displays a grid of four data tiles under the heading 'Total Monthly Sales'. Each tile represents a country's monthly sales: Australia (A\$11.28M, +12%), France (€31.30M, +7.2%), Germany (DM15.74M, +6.4%), and the United States (\$57.49M, +4.4%). Each tile includes a line chart for April 2016 and a 'Manage' button in the top right corner of the grid.

Required URL parameters are:

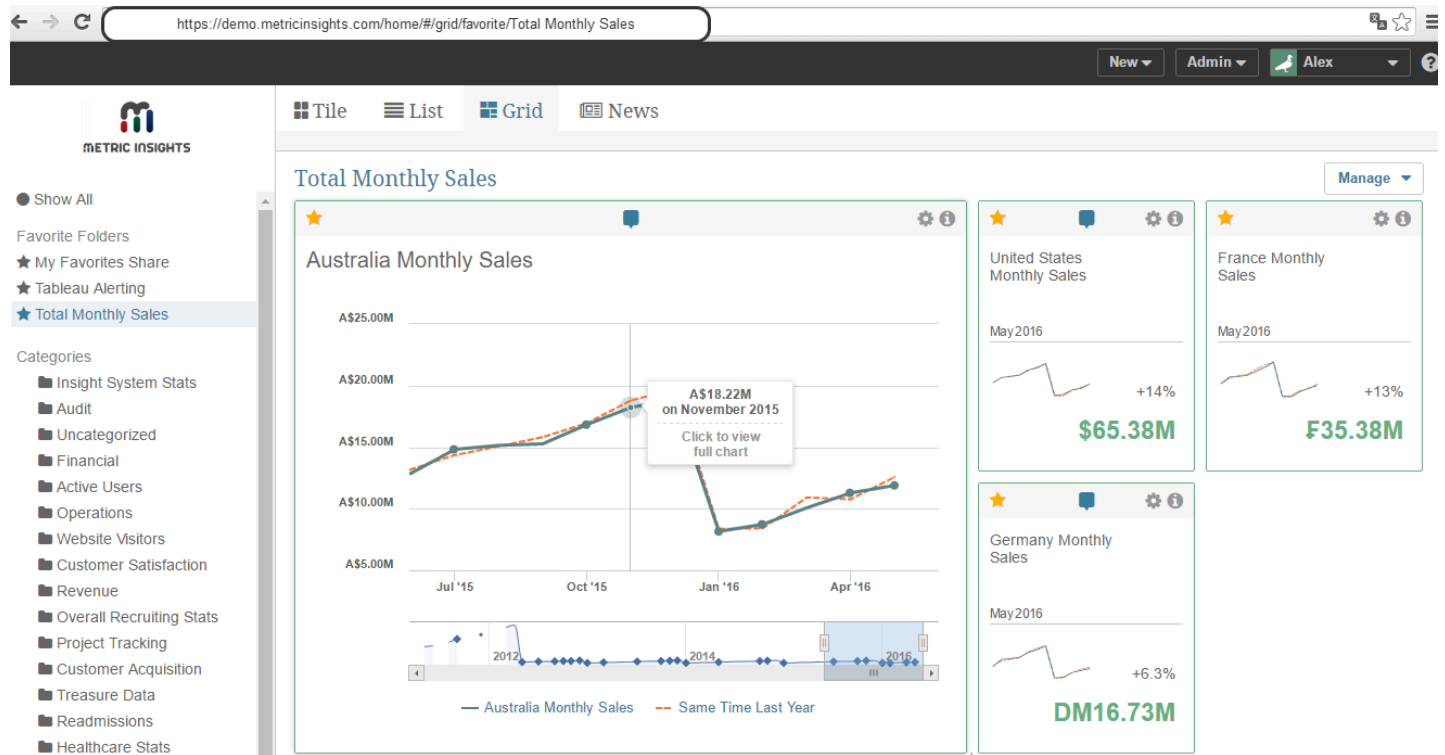
```
https://yourMetricInsightsInstance.com/home/#/favorite/Favorite Folder Name
```

**Example:** You may open the Favorite Folder named "Total Monthly Sales" by modifying the URL to:

```
https://demo.metricinsights.com/home/#/favorite/Total Monthly Sales
```



## 2.6. Open Favorite Folder in a Grid View



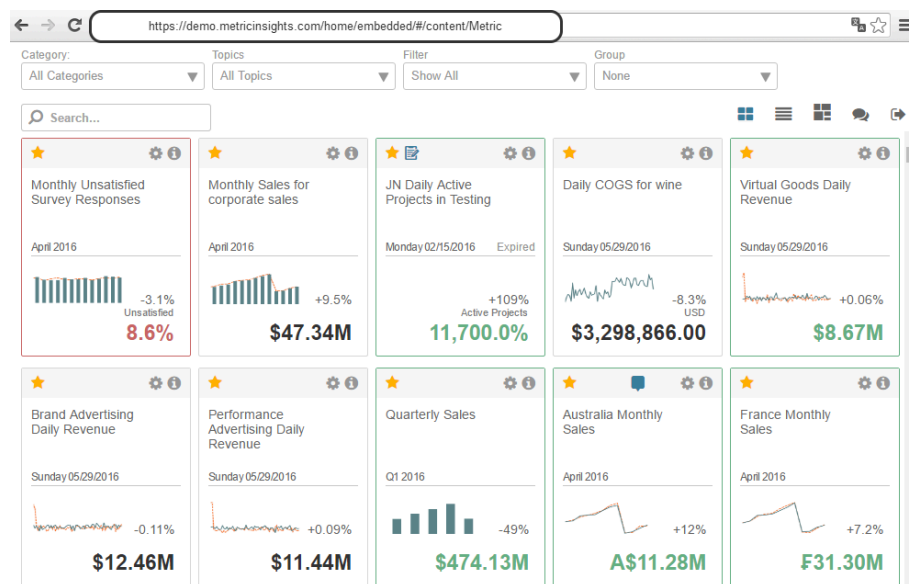
Required URL parameters are:

<https://yourMetricInsightsInstance.com/home/#/grid/favorite/Favorite Folder Name>

**Example:** You may open the Favorite Folder named "Total Monthly Sales" in the Grid view by modifying the URL to:

<https://demo.metricinsights.com/home/#/grid/favorite/Total Monthly Sales>

## 2.7. Filter Content to Open in iFrame



Should you wish to display the *Homepage* using an inline Frame (iFrame), this can be accomplished by using the embedded parameter in the URL.

- **Filter for Element Type**

```
https://yourMetricInsightsInstance.com/home/embedded/#/content/ElementType
```

**Example:** You can filter the *Homepage* based upon the 'Metric' Element Type in an iFrame by changing the URL to:

```
https://demo.metricinsights.com/home/embedded/#/content/Metric
```

Note that the difference in this display from previous examples is that it excludes the Menu and Header sections, i.e., only the Element section is displayed in the frame

- **iFrame filtered by Category Name or ID**

Required URL parameters are:

```
https://yourMetricInsightsInstance.com/home/embedded/#/category/CategoryName OR
https://yourMetricInsightsInstance.com/home/embedded/#/category/CategoryID
```

**Example:** You may filter the *Homepage* content by a specific Category with the name 'Training' in an iFrame by modifying the URL to:

```
https://demo.metricinsights.com/home/embedded/#/category/Training
```

- **iFrame Combining Element Type and Category Filters**

A combination of Element Type and Category filters may also be used:

```
https://yourMetricInsightsInstance.com/home/embedded/content/CommaSeparatedElementTypes/  
category/CategoryName OR https://yourMetricInsightsInstance.com/home/#/content/  
CommaSeparatedElementTypes/category/CategoryID
```

**Example:** Filter based upon the 'Report' Element Type as well as the 'Training' Category by modifying the URL to::

```
https://demo.metricinsights.com/home/embedded/#/content/Report/category/Training
```

## 3. User Preferences

## 3.1 My Settings (aka "Preferences")

The Metric Insights system provides a series of parameters that can be set to govern the major Catalog and Notifications functions in a manner that best suits the way you use Metric Insights to do your job.

### Access Personal Menu > My Settings

#### User Profile

My Settings

Search

3 Docs + New... Content Admin Julia

My notifications are ON for email, SMS and Phone Alerts - Thursday - June 4, 2020 System 08:50 UTC(UTC +00:00)

Notifications Alerts Favorites Settings Mobile

Saved Use Defaults

1 Profile picture [Load new picture](#)

Username iryna

2

First name Julia

Last name

Email address @metricinsights.com

This section allows you to:

1. Upload profile picture
2. Update:
  - First name
  - Last name
  - Email address

The system does not allow you to change a username.

# Catalog Display

The screenshot shows the 'Catalog Display' settings page. It includes a toggle for 'Show Categories on Homepage', a 'Content Layout' dropdown, a group of four dropdowns (Default Folder, Default Filter, Default Tag, Default Group) highlighted by a black box, a 'Start Page' dropdown, a 'Homepage refresh frequency' input field, and radio buttons for 'Show inaccessible tiles as'.

**1** ☒ Show Categories on Homepage

**2** Content Layout: Tile

**3** Default Folder: Last Active Category

Default Filter: No Filter

Default Tag: All Tags

Default Group: Folders


**4** Start Page: Catalog

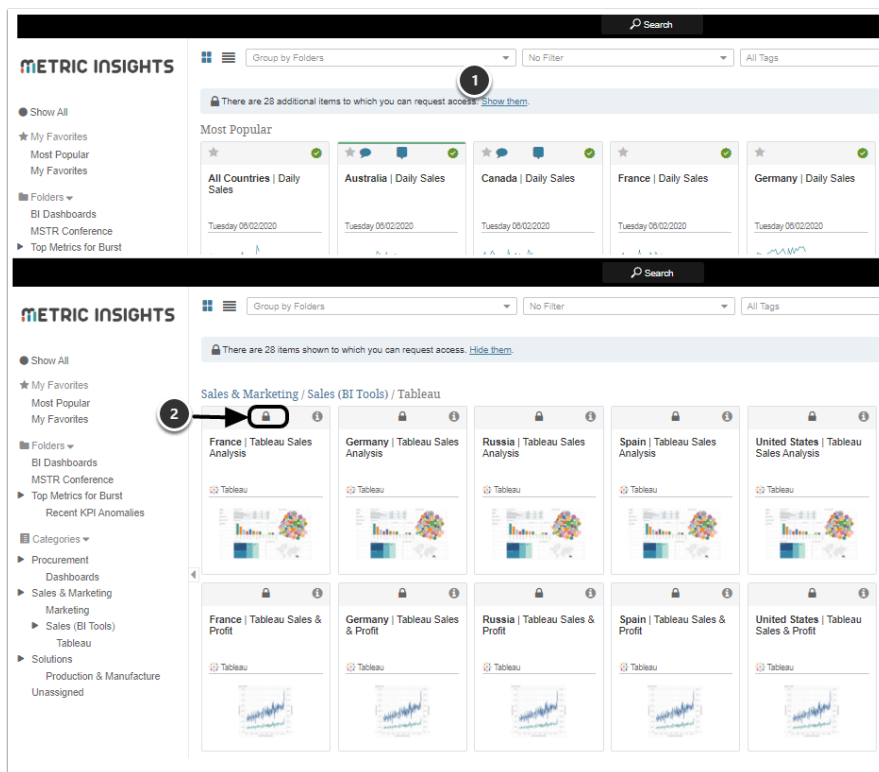
**5** Homepage refresh frequency: 600 seconds

**6** Show inaccessible tiles as: ☒ Locked Tiles | ☐ Hidden

In Catalog Display, settings allow to:

1. Set to display or hide listing of Categories
2. Select tile or list layout
3. Set default:
  - Folder
  - Filter
  - Tag
  - Group
4. Select Start Page to be displayed: Drop-down contains the Portal Pages you are authorized to view.
5. Set automatic refresh frequency (set higher to reduce refresh frequency, if necessary)
6. Set default display for inaccessible tiles:
  - Locked tiles: Contain locked indicators and/or blurred images
  - Hidden tiles: Can be shown by selecting "Show them" on the banner on Catalog

 For External Report set as "internal" but "discoverable to users without access", the system allows to blur their image, set a request to grant access, upload custom review page, and customize access denied message.



For unauthorized users:

1. Some tiles require granting access (locked, but are discoverable), or
2. Inaccessible tiles can be hidden or shown

💡 For more information, see [Set Custom Access Requests](#).

## Catalog Tile Display

**Catalog Tile Display**

- 1** ☒ Show Tile Previews
- 2** When grouping tiles by a Dimension ☐ show totals first | ☒ show totals last | ☐ omit totals group
- 3** Color scheme
- 4** Clear flags from Tiles after  seconds of hovering (applies to flags for Alerts, Annotations and Comments)

Catalog Tile Display allows a user to:

1. Enable tiles preview
2. Arrange placement of the total Dimension value
3. Choose color scheme (examples based on the color scheme selected are shown below)
4. Set time after which Alert, Annotation or Note icons are removed when hovering over a tile

## Data Entry Preferences

**Data Entry Preferences**

- 1** ☒ Warn me when I attempt to leave a page that has pending changes
- 2** ☒ Validate fetch command variables
- 3** ☒ Always open Editors in Advanced Mode

Data Entry Preferences allow a user to:

1. Enable warning about leaving a page
2. Validate fetch command variables when editing Datasets, Metrics, and Dimensions
3. Set Editors to open in either simplified mode (based on a template) or advanced mode (with all available settings)



Save changes.

## 3.2 My Notifications (Overview, Set up, Turn on / off)

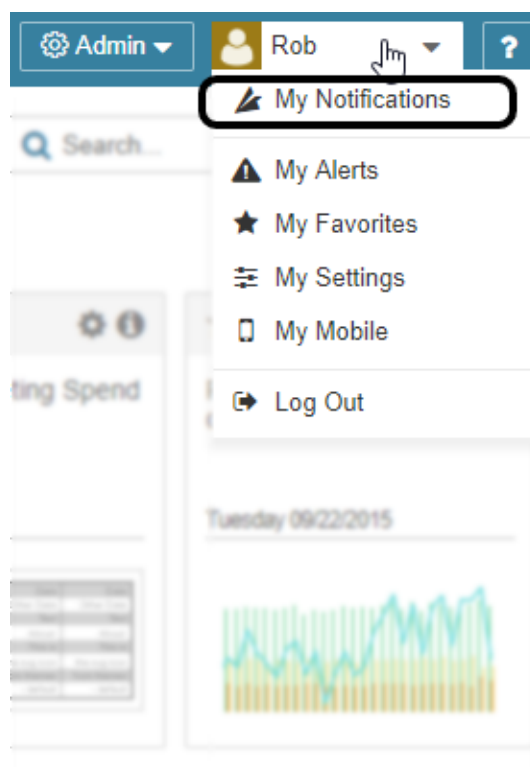
In the *Notifications Editor*, you can customize a number of essential features of Metric Insights, such as Alerts, Favorites, Bursts, Schedules, and your Personal Preferences.

💡 This article describes Notifications management in Version 5.1 and newer.

For the reference on prior Versions see: [My Notifications \(Overview, Set up, Turn on / off\) \(Versions prior to 5.1\)](#)

### Video Tutorial

### Accessing Notifications



### What Notifications am I subscribed to? How to set up

## distribution method/schedule?

Metric Insights offers several kinds of Notifications which give you freedom to choose what you would like to be informed about either immediately or in an email Digest.

*My Notifications* screen provides a way to see overall history and maintain email addresses

1. The **Notifications** table displays all of your subscriptions, their delivery schedule, email address they are sent to and the last sent date/time. To subscribe/unsubscribe from receiving notifications toggle, them on or off. **These preferences will be automatically saved.**
2. You can configure Notification's behavior / delivery email / template by clicking a **Gear** icon in the respective row.
3. **Notification History** is the list of all notifications previously sent to you.

**!** To simplify data entry for your subscriptions, you can set Alerts, both Immediate and Digest, and Expired Elements Digest independently, but changing any of the other email addresses will cause all of the other notifications to be reset to that email address.

My Notifications
0
New...
Content
Admin
Rob

My notifications are ON for emails, SMS and Phone Alerts · Tuesday - July 11, 2017 System 14:22 UTC(UTC +00:00)

Notifications
Alerts
Favorites
Settings
Mobile

### Notifications

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

	Name	Schedule	Last sent on	Send To	
<input checked="" type="checkbox"/>	Favorite Digest	Daily (Every day at 0:00)		robert@nomail.com	
<input checked="" type="checkbox"/>	Daily Notification Digest	Daily (Every day at 0:00)		robert@nomail.com	
<input checked="" type="checkbox"/>	Immediate Notification Digest	Immediate Distribution Schedule (Every 1 minute)		robert@nomail.com	
<input checked="" type="checkbox"/>	Monthly Notification Digest	Monthly (On the 1st at 0:00)		robert@nomail.com	
<input type="checkbox"/>	Weekly Notification Digest	Weekly (On Sun at 0:00)		robert@nomail.com	
<input checked="" type="checkbox"/>	Immediate Alerts	Immediate Distribution Schedule (Every 1 minute)		Email: robert@nomail.com	
<input checked="" type="checkbox"/>	Alert Digest	Daily (Every day at 0:00)		robert@nomail.com	
<input checked="" type="checkbox"/>	Collaboration Notifications	Daily (Every day at 0:00)		robert@nomail.com	
<input type="checkbox"/>	Expired Element Digest	Daily (Every day at 0:00)		Reg@nomail.com	

[Send Emails Now](#)

### Notification History

Filter by all Display from 2016-07-11 00:00 to 2017-07-12 00:00

Send Time	Subscription	Delivery Method
-----------	--------------	-----------------

## Notifications Description

Name	Available Distribution Methods	Description
Favorite Digest	Email Digest: <ul style="list-style-type: none"> <li>one email to include all favorite Folders</li> <li>a separate email for each Favorite Folder</li> </ul>	<p>If you open a <i>Homepage</i> and look at the upper section of the <i>Left Sidebar</i>, there is a list of your <b>Favorite Folders</b>. Alternatively, access <i>My Notifications &gt; Favorites</i>. These Favorite Folders were either created by you or shared with you.</p> <p>You can choose to send updates per any or all of them on a specified schedule.  <a href="#">Requesting a Favorite Digest</a></p>
Daily Notification Digest	Email Digest	<p>One of the default options offered for subscribing to a <a href="#">Report Notification</a>. Its essence is similar to a Burst: after you subscribe to a new Report using this Digest option, updates on this element (together with other ones per this Digest) are sent to you on a Schedule.</p> <p>Distribution schedules for these Digests are defined globally and cannot be changed according to personal User Preferences. For example, if Daily Notification Digest is set up to be sent "Daily (Every day at 0:00)" by the Admin, every User subscribed to it is going to receive it at the same time. But the content of such Email digest is going to vary depending on User's subscriptions to different Reports and his scope of element access.</p> <p>Same rules apply to: Weekly / Monthly Notification Digest.</p>
Immediate Notification Digest	Email Digest	<p>One of the default options offered for subscribing to a <a href="#">Report Notification</a>. Once subscribed, a user is going to receive an email only in case the Report includes at least one new row after an update. If there are no new rows, an email will not be sent.</p>
Burst (Optional)	Email Digest	<p>Burst is a scheduled email notification with updates per selected element(s). (In contrast to Favorite Digests, it is an update sent to multiple users at once. For example, a weekly "Top Performers" Burst to a sales team.)  <a href="#">Creating a Burst</a></p>

Name	Available Distribution Methods	Description
Monthly Notification Digest	Email Digest	See: Daily Notification Digest above.
Weekly Notification Digest	Email Digest	See: Daily Notification Digest above.
Immediate Alerts	<ul style="list-style-type: none"> <li>• Immediate email</li> <li>• SMS message</li> <li>• Phone alert (Mobile app push notification)</li> </ul>	<p>Alert Rules can be created for Metrics, Reports, and External Reports.</p> <p>For example, an Alert Rule can fire when a number of units sold reach the lower threshold level. All users subscribed to this Alert are going to get a notification via their preferred Distribution method.</p> <p><b>NOTE:</b> When such Alert Rule is created, a default distribution method (immediate / email digest or browser only) is assigned to it, but when a user subscribes to this Alert Rule, he can choose his preferred method <a href="#">Setting up Alerts</a></p>
Alert Digest	Email Digest	See: Immediate Alerts above Alert Digest is sent on schedule and includes updates for all Alerts fired since the last email.
Collaboration Notifications	<ul style="list-style-type: none"> <li>• Email Digest</li> <li>• Immediate email</li> <li>• Phone alert (Mobile app push notification)</li> </ul>	<p>You can get either digests or immediate notifications for collaborative items:</p> <ul style="list-style-type: none"> <li>• If you follow certain Discussions or Users: <a href="#">Following discussions/users</a></li> <li>• In all / owned / favorite Metrics and Reports</li> </ul>
Expired Element Digest	Email Digest	<p>Depending on your selection, this Digest can include:</p> <ul style="list-style-type: none"> <li>• All expired Metrics and Reports</li> <li>• Expired Metrics and Reports where the User is an Owner</li> <li>• Expired Metrics and Reports which had been added to a User's Favorite Folder</li> </ul>

## How to turn Notifications off (completely / selectively)

If you want to stop Notifications from being sent to you, you can either turn them off completely or unsubscribe from specific Types of Notifications, which are described above.

### All Notifications are off

**My Notifications** 0 New... Content Admin

My notifications are OFF for emails, SMS and Phone Alerts - Tuesday - July 11, 2017 System 14:53 UTC(UTC +00:00)

**Notifications**

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

	Name	Schedule	Last sent on	Send To
<input type="checkbox"/>	Favorite Digest	Daily (Every day at 0:00)		robert@nomail.com
<input type="checkbox"/>	Daily Notification Digest	Daily (Every day at 0:00)		robert@nomail.com

**Hourly Peak Website Visits**

1d 7d 4w 30d 12w

Hourly Peak Website Visits

75,000  
50,000  
25,000  
0

6. Jul 13. Jul 20. Jul 27. Jul 3. Aug 10. Aug

● Hourly Peak Website Visits

Current value 14,355 08/13/2015 12 AM

% Change Down 39% from last hour

Avg 25348.9

Minimum ever 14,355 08/13/2015 12 AM

Maximum ever 48,411 08/11/2015 12 AM

Business owner [John Berg](#)

Technical owner John Berg

Element ID 11

Last updated Jul 11, 2017 0:18

All Notifications are off.

At the top of *My Notifications* screen, you can toggle **Notifications OFF**, which will stop ALL of your notifications from being sent to you.

All Notifications are off.

You will still be able to receive emails on elements or collaborative data that others have **shared** with you.

**NOTE:** Even if notifications are off, you can receive notifications related to *Favorites* and *Bursts* upon request by clicking **Send now** in the corresponding tab.

## Notifications not enabled

**My Notifications** [New...] [Content] [Admin] [Julia]

My notifications are ON for emails, SMS and Phone Alerts - Tuesday - July 11, 2017 System 15:44 UTC(UTC +00:00)

Notifications Alerts Favorites Settings Mobile

Notifications

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Name	Schedule	Last sent on	Send To	Disabled Schedule	Disabled Emails
<input type="checkbox"/> Favorite Digest	Daily (Every day at 0:00)	2017-07-11 07:01:39	yulia.nesova@metricinsights.com		
<input checked="" type="checkbox"/> Daily Notification Digest	Daily (Every day at 0:00)	2017-07-11 07:01:53	yulia.nesova@metricinsights.com		
<input checked="" type="checkbox"/> Immediate Notification Digest	Immediate Distribution Schedule (Every 1 minute)		yulia.nesova@metricinsights.com		
<input checked="" type="checkbox"/> Monthly Notification Digest	Monthly (On the 1st at 0:00)		yulia.nesova@metricinsights.com		
<input checked="" type="checkbox"/> Weekly Notification Digest	Weekly (On Sun at 0:00)		yulia.nesova@metricinsights.com		
<input type="checkbox"/> Immediate Alerts	Immediate Distribution Schedule (Every 1 minute)		Email: yulia.nesova@metricinsig...		

**Daily Sales - Watch Demo**

4w 2m 12w 1y

Alert Notifications not enabled, Alerts visible in browser only.

Current value \$6.12M Thursday 08/13/2015

% Change Down 4.8% from yesterday

Avg \$8.20M

Minimum ever \$4.41M Saturday 01/10/2015

Maximum ever \$8.53M Wednesday 08/12/2015

Business owner [John Berg](#)

Technical owner Olik Olik

Element ID 276

Last updated Jul 11, 2017 15:42

If you are unsubscribed from specific Notification types (as shown in the picture above for Alert notifications), you are not going to receive such Notifications, even if you subscribe to them in the Element Viewer:

Notifications not enabled; Alerts visible in browser only.

## [Alerts tab] What Elements (Alerts) am I subscribed to?

My Alerts

My notifications are ON for emails, SMS and Phone Alerts · Tuesday - July 11, 2017 System 15:47 UTC(UTC +00:00)

Notifications Alerts Favorites Settings Mobile

Type filter

Elements	Name	Type	Alerts in Last 30 Days
<input type="checkbox"/>	Daily Active Users	metric	1
<input checked="" type="checkbox"/>	Daily Sales from Tableau by Country Values	metric	0
<input checked="" type="checkbox"/>	Daily Profits by Region Values	metric	0
<input type="checkbox"/>	Daily Sales - Watch Demo	metric	0
<input type="checkbox"/>	Daily Snapshot Report (QV)	internal report	0
<input type="checkbox"/>	Country and Channels with 10% sales increase Report Row Count	metric	0

+ New subscription Selected subscriptions

1. In this tab, you can see all elements with the Alert Rules you are subscribed to.
2. To delete multiple subscriptions, select the elements > **Delete Selected subscriptions** button becomes active. Alternatively, you can delete subscriptions one by one by clicking a Trashbin icon on the respective row.
3. You can set up Alert settings and subscriptions in this tab. To learn how to set up Alert, see [Setting up your Alerts using Alert Editor](#)



## [Favorites tab] How to manage Favorite Folders?

My Favorites

My notifications are ON for emails, SMS and Phone Alerts · Tuesday - July 11, 2017 System 15:58 UTC(UTC +00:00)

Notifications Alerts **Favorites** Settings Mobile

Maintain content, schedule and sharing of your Favorite folders

### Favorite Folders

Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5		⚙️ ↗️ ⬇️
My Favorites	1	✓	⚙️ ↗️ ⬇️ 📄 🗑️
My BI Content	10		⚙️ ↗️ ⬇️ 📄 🗑️

+ New Favorite Folder

✓ Preview Favorites Digest Send now

In this tab, you can see all your Favorite folders and any other Favorite folders that other created and have shared with you.

The functions performed here are explained in detail here: [Using Notifications: Favorites Editor to Maintain Favorites](#)

- **Most Popular** folder: This folder is a default system folder and cannot be deleted. It is populated with the elements which either have been recently added to some of your favorite folders or were viewed by you within the last days. The default number of tiles shown in this folder is 5, but you can increase it at *Admin > Utilities > Config Variables > MOST\_POPULAR\_FOLDER\_TILE\_COUNT*.

**NOTE:** Even if all notifications are disabled, you can receive current information on elements contained in the Favorite folders by clicking **Send now** at the bottom of the *Favorites* tab

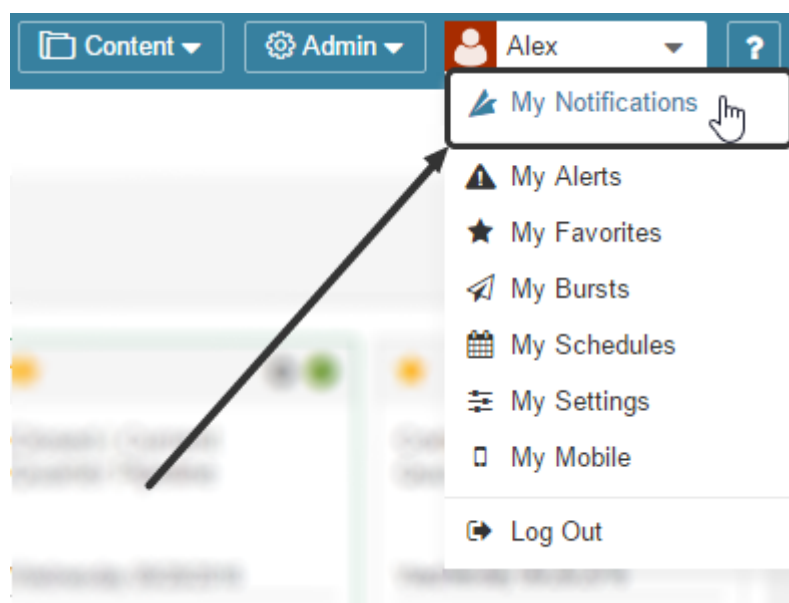
💡 To learn how to configure your profile in My Settings tab, go to: [My Preferences](#)

## 3.3 My Notifications (Overview, Set up, Turn on / off) (Versions prior to 5.1)

In the *Notifications Editor*, you can customize a number of essential features of Metric Insights, such as Alerts, Favorites, Bursts, Schedules, your Personal Preferences.

### Video Tutorial

### Accessing Notifications



### 1. What Notifications am I subscribed to? How to set up distribution method/schedule?

Metric Insights offers several kinds of Notifications which give you freedom to choose what you would like to be informed about either immediately or in an email Digest.

*My Notifications* screen provides a way to see overall history and maintain email addresses

1. The **Notifications** table displays all of your subscriptions, their delivery schedule, email address they are sent to and the last sent date/time. To subscribe/unsubscribe from receiving notifications select/clear check boxes and click **Save changes**.
2. You can configure notifications behavior by clicking a **Gear** icon in the respective row.
3. **Notification History** is the list of all notifications previously sent to you

**My Notifications**

My notifications are ON for emails, SMS and Phone Alerts - Thursday - May 4, 2017 System 12:08 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

**Notifications**

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Name	Type	Schedule	Send To	Last Sent Date/Time
<input type="checkbox"/> Favorite Digest	Consolidated	Daily (Every day at 0:00)	e@yourcompany.com	2017-05-04 08:01:36
<input checked="" type="checkbox"/> Daily Items for Review (Alex Kenn...	Burst	Daily M-F (On Mon, Tue, Wed, Thu & Fri at 0:00)	e@yourcompany.com	
<input checked="" type="checkbox"/> Immediate Alerts	Email, SMS	Immediate Distribution Schedule (Every 3 minut...	Email: e@yourcompany.com SMS: viking@developex.com	2017-05-03 05:05:12
<input type="checkbox"/> Alert Digest	Digest	Immediate Distribution Schedule (Every 3 minut...	admin@yourcompany.com	2017-05-03 05:05:06
<input checked="" type="checkbox"/> Collaboration Notifications	Email	Immediate Distribution Schedule (Every 3 minut...	e@yourcompany.com	2016-01-25 19:41:11
<input type="checkbox"/> Expired Element Digest	Digest	Daily (Every day at 0:00)	e@yourcompany.com	

Save changes

**Notification History**

Filter by: all Display from: 2016-05-04 00:00 to: 2017-05-05 00:00

Send Time	Subscription	Delivery Method
2017-05-04 08:01:36	Daily Favorite Digest	x@no.com
2017-05-03 08:01:55	Daily Favorite Digest	x@no.com
2017-05-03 05:05:12	Immediate Alerts	admin@yourcompany.com

## Notifications Description

Name	Available Distribution Methods	Description
Favorite Digest	Email Digest: <ul style="list-style-type: none"> <li>one email to include all favorite Folders</li> <li>a separate email for each Favorite Folder</li> </ul>	If you open a <i>Homepage</i> and look at the upper section of the <i>Left Sidebar</i> , there is a list of your <b>Favorite Folders</b> . Alternatively, access <i>My Notifications &gt; Favorites</i> . These Favorite Folders were either created by you or shared with you.  You can choose to send updates per any or all of them on a specified schedule. <a href="#">Requesting a Favorite Digest</a>
Burst (Optional)	Email	Burst is a scheduled email notification with updates per selected element(s). (In contrast to Favorite Digests, it is an update sent to multiple users at once. For example, a weekly "Top Performers" Burst to a sales team.) <a href="#">Creating a Burst</a>

Name	Available Distribution Methods	Description
Immediate Alerts	<ul style="list-style-type: none"> <li>• Immediate email</li> <li>• SMS message</li> <li>• Phone alert (Mobile app push notification)</li> </ul>	<p>Alert Rules can be created for Metrics, Reports, and External Reports.</p> <p>For example, an Alert Rule can fire when a number of units sold reach the lower threshold level. All users subscribed to this Alert are going to get a notification via their preferred Distribution method.</p> <p><b>NOTE:</b> When such Alert Rule is created, a default distribution method (immediate / email digest or browser only) is assigned to it, but when a user subscribes to this Alert Rule, he can choose his preferred method <a href="#">Setting up Alerts</a></p>
Alert Digest	Email Digest	<p>See: Immediate Alerts</p> <p>Alert Digest is sent on schedule and includes updates for all Alerts fired since the last email.</p>
Collaboration Notifications	<ul style="list-style-type: none"> <li>• Email Digest</li> <li>• Immediate email</li> <li>• Phone alert (Mobile app push notification)</li> </ul>	<p>You can get either digests or immediate notifications for collaborative items:</p> <ul style="list-style-type: none"> <li>• If you follow certain Discussions or Users: <a href="#">Following discussions/users</a></li> <li>• In all / owned / favorite Metrics and Reports</li> </ul>
Expired Element Digest	Email Digest	<p>Depending on your selection, this Digest can include:</p> <ul style="list-style-type: none"> <li>• All expired Metrics and Reports</li> <li>• Expired Metrics and Reports where the User is an Owner</li> <li>• Expired Metrics and Reports which had been added to a User's Favorite Folder</li> </ul>

## 2. How to turn Notifications off (completely / selectively)

If you want to stop Notifications from being sent to you, you can either turn them off completely or unsubscribe from specific Types of Notifications, which are described above.

## All Notifications are off

My Notifications

New... Content Admin Alex

My notifications are OFF for emails, SMS and Phone Alerts Thursday - May 4, 2017 System 13:44 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

### Notifications

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Notifications	Name	Type	Schedule	Send To	Last Sent Date/Time
<input type="checkbox"/>	Favorite Digest	Consolidated	Daily (Every day at 0:00)	e@yourcompany.com	2017-05-04 08:01:36

New... Content

Previous Next preview

### ★ Daily Sales

7d 4w 2m 12w 1y 2y 5y 10y 30y

Daily Sales

30,000,000  
20,000,000  
10,000,000

Current value 22,000,110 Tuesday 05/02/2017

% Change Up 31% from Same Time 3 Months Ago

30 Day Avg 22,496,844

Minimum ever 627,103 Thursday 01/28/2010

Maximum ever 42,473,024

All Notifications are off, Alerts are visible in browser.

At the top of *My Notifications* screen, you can toggle **Notifications OFF**, which will stop ALL of your notifications from being sent to you.

All Notifications are off.

You will still be able to receive emails on elements or collaborative data that others have **shared** with you.

**NOTE:** Even if notifications are off, you can receive notifications related to *Favorites* and *Bursts* upon request by clicking **Send now** in the corresponding tab.

## Notifications not enabled

**My Notifications**

My notifications are ON for emails, SMS and Phone Alerts - Thursday - May 4, 2017 System 14:04 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

**Notifications**

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Name	Type	Schedule	Send To	Last Sent Date/Time
<input checked="" type="checkbox"/> Favorite Digest	Consolidated	Daily (Every day at 0:00)	e@yourcompany.com	2017-05-04 08:01:36
<input checked="" type="checkbox"/> Daily Items for Review (Alex Ken...	Burst	Daily M-F (On Mon, Tue, Wed, Thu & Fri at 0:00)	e@yourcompany.com	
<input checked="" type="checkbox"/> Immediate Alerts	Email, SMS	Immediate Distribution Schedule (Every 3 min...	Email: e@yourcompany.com SMS: viking@developex.com	2017-05-03 05:05:12
<input checked="" type="checkbox"/> Alert Digest	Digest	Immediate Distribution Schedule (Every 3 min...	admin@yourcompany.com	2017-05-03 05:05:06
<input checked="" type="checkbox"/> Collaboration Notifications	Email	Immediate Distribution Schedule (Every 3 min...	e@yourcompany.com	2016-01-25 19:41:11

**Canada Weekly Sales**

12w 6m 1y

Current value: \$5.00M

% Change: Down 5.6% from last week

10 Day Avg: \$2.43M

Minimum ever: \$0.76M 03/26/2016

Maximum ever: \$6.42M 12/10/2016

Business owner: Alex Langton

If you are unsubscribed from specific Notification types (as shown in the picture above for Alert notifications), you are not going to receive such Notifications, even if you subscribe to them in the Element Viewer:

Notifications not enabled

### 3. [Alerts tab] What Elements (Alerts) am I subscribed to?

My Alerts

New... Content Admin Alex

My notifications are ON for emails, SMS and Phone Alerts · Thursday - May 4, 2017 System 14:14 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

Filter by all Type filter

Elements	Name	Type	Alerts in Last 30 Days
<input type="checkbox"/>	Daily Sales	metric	22
<input type="checkbox"/>	Monthly Unsatisfied Survey Responses	metric	0
<input checked="" type="checkbox"/>	Monthly Sales by Country Values	metric	0
<input checked="" type="checkbox"/>	Average Daily Sales Per Commerce Website Visitor	metric	0
<input type="checkbox"/>	Weekly Sales by Country Values	metric	0
<input type="checkbox"/>	Canary Metric for Daily Sales by Product Category Values	metric	0
<input type="checkbox"/>	Canary Metric for Daily COGS by Product Category Values	metric	0
<input type="checkbox"/>	Total Daily Income	metric	0
<input type="checkbox"/>	Summary on Daily Sales	metric	0

+ New subscription Selected subscriptions

1. In this tab, you can see all elements with the Alert Rules you are subscribed to.
2. To delete multiple subscriptions, select the elements > **Delete Selected subscriptions** button becomes active. Alternatively, you can delete subscriptions one by one by clicking a Trashbin icon on the respective row.
3. You can set up Alert settings and subscriptions in this tab. To learn how to set up Alert, see [Setting up your Alerts using Alert Editor](#)

## 4. [Favorites tab] How to manage Favorite Folders?

My Favorites

My notifications are ON for [emails](#), SMS and Phone Alerts · Thursday - September 29, 2016 System 03:48 PDT(UTC -07:00)

Notifications Alerts **Favorites** Bursts Schedules Settings Mobile

Maintain content, schedule and sharing of your Favorite folders

### Favorite Folders

Display Name	Number of Elements	Include in Digest	Actions
My Favorites	0	✓	
Tableau Alerting	3		

[+ New Favorite Folder](#)

[✓ Preview Favorites Digest](#) [Send now](#) This will send an email to al@gmail.com

In this tab, you can see all your Favorite folder and any Favorite folders that other created and have shared with you.

The functions performed here are explained in detail here: [Using Notifications: Favorites Editor to Maintain Favorites](#)

**NOTE:** Even if all notifications are disabled, you can receive current information on elements contained in the Favorite folders by clicking **Send now** at the bottom of the *Favorites* tab

## 5. [Bursts tab] What is a Burst?

My Bursts

My notifications are ON for [emails](#), SMS and Phone Alerts · Thursday - September 29, 2016 System 06:01 PDT(UTC -07:00)

Notifications Alerts Favorites **Bursts** Schedules Settings Mobile

### Bursts

Maintain your Bursts and subscribe to other Users' distribution of a group of tiles or folders

Name	Schedule	Recipients	Last Sent on
<input type="checkbox"/> Test burst	Daily M-F (On Mon, Tue, Wed, Thu & Fri at ...	1	

[+ New Burst](#) [Send now](#)



Burst is a scheduled email notification informing Users about updates for selected element(s).

1. The **Bursts** table displays all created bursts, along with the associated schedule, number of recipients and last sent date and time
2. The **[+ New Burst]** button functions are covered in this [article](#).

**NOTE:** Even if all notifications are disabled, you can receive Notifications for Burst(s) selected from the list by clicking **Send now**.

## 6. [Schedules tab] What is a Schedule?

My Schedules

My notifications are ON for [emails](#), SMS and Phone Alerts · Thursday - September 29, 2016 System 03:56 PDT(UTC -07:00)

Notifications Alerts Favorites Bursts **Schedules** Settings Mobile

### Schedules

Private Schedules that you have created

Notification Schedules			● Disabled Schedule
Name ^	Bursts	Last Sent	
On Mon, Wed, Thu, Fri, Sat & Sun at 8:00	0 bursts		
On Thu, Fri & Sat at 8:00	0 bursts		

[+ New Schedule](#)

When users subscribe to receiving notifications for Alerts, Favorites, Collaborative content, Bursts or expired elements, they can specify how frequently the system should distribute these notifications. Along with the predefined frequencies (such as 'Hourly', 'Daily', etc.) available in the system, each user can create custom Notification Schedules.

To learn how to create new Notification Schedules, refer to [Managing Notification Schedules](#)

### Want to learn more?

KPI Alerts: [Basics for the Alert Wizards - KPI Rules](#)

Bursts: [Create a new Burst](#)

## 4. Element Viewers

# 4.1 Access, Create, and modify Dataset Views

**i** A User can create a **Private View** for those Datasets to which they have been granted permission to view. For details on Security see [Datasets](#) in [Controlling Access within Metric Insights](#)

## 1. Access Content menu > Views

The screenshot shows the 'Views' page in Metric Insights. The top navigation bar has a 'Views' tab selected. A dropdown menu is open from the 'Content' menu, showing options like 'Bursts', 'Folders', 'Views', and 'FTP Connections'. The 'Views' option is highlighted. Below the navigation bar, there are filters for 'Dataset name', 'Created by', and 'Visibility'. A table lists various views, including 'Revenue - a private view for Revenue' which is highlighted with a red box. At the bottom left, a red circle with the number '1' is next to the '+ New View' button.

Views	Name	Owner	Visibility	Reports	Metrics	Last Updated
<input type="checkbox"/>	Daily Sales		Public	2	0	2019-03-26 00:00:00
<input type="checkbox"/>	Daily Sales - removed Product name and summed values		Public	1	0	2019-03-19 19:25:47
<input type="checkbox"/>	New Dataset		Public	0	0	2018-07-30 07:26:46
<input type="checkbox"/>	Revenue - Sales per Country and Channel		Public	1	0	2017-02-20 07:10:40
<input type="checkbox"/>	Revenue		Public	0	0	2019-03-25 00:00:00
<input type="checkbox"/>	Revenue - a private view for Revenue	abby Kennedy	Private	0	0	2019-03-26 19:39:36
<input type="checkbox"/>	Revenue - Sales decreases by Channel and Country	anna Kennedy	Public	2	0	2018-05-08 00:19:28
<input type="checkbox"/>	Revenue - Sales and Revenue Growth		Public	1	0	2018-05-04 14:08:29
<input type="checkbox"/>	Revenue - Items sold via Website		Public	0	0	2017-02-20 17:31:48
<input type="checkbox"/>	Revenue - Canada Sales		Public	0	0	2017-02-20 17:26:13
<input type="checkbox"/>	Sales data by Country and Channel		Public	0	0	2019-03-25 00:00:00
<input type="checkbox"/>	Sales data by Country and Channel - Sales data by Country and Chann...		Public	0	0	2018-07-30 07:26:46

You will be able to View any **Public** Views defined for Datasets that you have Permission to Access, plus any Views you have already created. (Only Admin, and Power Users with Edit Access to the Dataset, may create Public Views)

1. Select [+ New View] to open the pop-up

## 2. Setup the new View

The top screenshot shows the 'New Dataset View' dialog box with the 'Dataset' dropdown menu open. A red circle with the number '1' is next to the dropdown. The 'Revenue' option is highlighted in the list. The 'Name' field is empty. A red circle with the number '2' is next to the 'New Dataset View' button.

The bottom screenshot shows the 'New Dataset View' dialog box with the 'Dataset' dropdown menu set to 'Revenue'. The 'Name' field contains the text 'a private view for Revenue'. A red circle with the number '2' is next to the 'Name' field. A red circle with the number '1' is next to the 'New Dataset View' button.

1. Select a **Dataset**
2. Input a **Name** for your Dataset View

Selecting [**New Dataset View**] will transfer you to the Dataset Viewer setup for your new View

### 3. Use your View to uncover anomalies or trends by using the Filters

The screenshot shows the Metric Insights interface for a dataset named "a private view for Revenue". The interface includes a top navigation bar with a home icon, the dataset name, and user information. Below the navigation bar, there is a header section with a dropdown menu showing "a private view for Revenue" and buttons for "Rename", "Save", "Save as", and "Actions". The main content area is divided into two tabs: "Select Fields" and "Track Changes". The "Select Fields" tab is active, showing a list of fields to select, including "Sales Channel", "Country", "name", "Date", "Units Sold", and "Sales". The "Define filters" tab is also visible, showing a section for defining filters with "AND" and "OR" options. Below the tabs, there is a "Results" section displaying a table of data. The table has columns: Date, Sales Channel, Country, Units Sold, Sales, and name. The data shows sales records for various countries and dates.

Date	Sales Channel	Country	Units Sold	Sales	name
2018-07-29 00:00:00	corporate sales	Australia	7,233	446,173	2009 Spring Hills Merlot
2018-07-29 00:00:00	corporate sales	Canada	17,960	1.02M	2009 Spring Hills Merlot
2018-07-29 00:00:00	corporate sales	United Kingdom	8,043	432,142	2009 Spring Hills Merlot
2018-07-29 00:00:00	corporate sales	Spain	9,303	517,292	2009 Spring Hills Merlot
2018-07-29 00:00:00	corporate sales	Russia	9,273	507,244	2009 Spring Hills Merlot

The data displayed for the new View will contain "All data" subject to any User Map applied to the Dataset. For details, see [Apply a User Map to a Dataset](#).

You can now define filters to customize your View of the data. See how in [Dataset Viewer \(select fields / define derived fields and filters\)](#)

## 4. Save the View

The screenshot shows the 'a private view for Revenue' interface. At the top, there's a navigation bar with 'Datasets / Revenue / a private view for Revenue'. Below it, the view name 'a private view for Revenue' is shown with a drop-down menu (callout 3), a 'Rename' button, a 'Save' button (callout 1), a 'Save as' button, and a 'Delete' icon (callout 2). To the right of the view name, there are buttons for 'Single Instance' (selected) and 'Last Two Instances', along with 'Current: Saturday 07/28/2018' and 'Prior: Friday 07/27/2018'. Below this, there are two tabs: 'Select Fields' and 'Track Changes'. The 'Select Fields' tab is active, showing a list of fields to select: 'Select text fields' (Sales Channel, Country, name), 'Select numeric & date fields' (Date, Units Sold, Sales), and a '+ Derived Field' button. The 'Define filters' tab is also visible, showing two filters: 'Country is in list' (canada, russia, germany, Australia) and 'Units Sold is greater than or equal to' (10000). At the bottom, there's a 'Results' table with columns: Country, Units Sold, Sum of Sales, name, Sales Channel, and Date. The table shows two rows of data for Germany and Canada. A 'Show: All of 2 rows' dropdown is at the bottom right.

Country	Units Sold	Sum of Sales	name	Sales Channel	Date
Germany	11,417	595,546	2009 Spring Hills Merlot	corporate sales	2018-07-29 00:00:00
Canada	17,960	1.02M	2009 Spring Hills Merlot	corporate sales	2018-07-29 00:00:00

1. **Save** the View to access later or
2. **Delete** the View
3. You will also be allowed to **View** but not edit any other existing Public Views for this Dataset via the drop-down

## 4.2 Basics of the Element Viewers

This is a very basic overview of the buttons and data displayed on most Metric and Report Viewers.

### 1. Basics



1. **Alternative View Buttons** allow you to change the format of data display or to link to elements with data related to this Chart
2. **Buttons** that allow you to add the chart to **Favorites** folder, **Share** information, check **Alerts** and **Edit** this Chart
3. **Data Point** displays explicit information on the current value of the data point, its previous changes and drill-path to linked elements that might be helpful in further data analysis
4. **Metric Summary** provides an outline of current value, trends, min and max values and links to the elements necessary for further analysis
5. **Range Selector** allows quickly determine a time period for the alternative view
6. **Legend** for the lines on the Chart
7. **Add Expert Analysis** allows adding a permanent note to help users understand the the data provided on the Chart
8. **Overlays** can be added to the current Chart to compare it with other different metrics, analyse the current metric with data at some point in past or define which Event Calendars should be shown at the Chart

9. [Annotations](#) or [Events](#) related to data points or data ranges; explanation of these is included in section below the Chart

To learn more about these Viewer options, refer to the respective sections of the article.

## 1.1. Alternative View Buttons



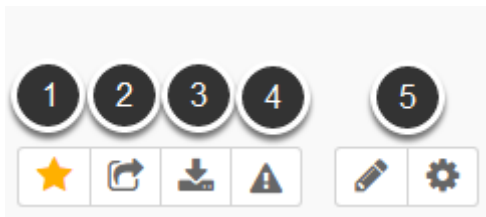
The following buttons offer various alternative options allowing to focus attention on specific metric aspects.

1. **Measurement Interval Options:** Switch among elements with the same Measure but with different Measurement Interval from this drop-down list: *Daily, Weekly, Monthly, Quarterly, Yearly*.
2. *For dimensioned elements only.* **Dimension values:** Use this drop down list to switch among different Charts of the pre-filtered data. For details, refer to: [Creating Dimensions](#)
3. **See Related:** button drop-down list is populated with elements with the same **Measure of** and **Measurement Interval** For more detail, see this [FAQ](#)
4. **Tags** (*In Version prior to 5.1: Topics*): Starting from Version 5.1 all tags assigned to the element are displayed at the top panel of the Viewer. Upon clicking a specific Tag label, you are redirected to a Homepage with content filtered down to only those elements which are tagged with the sama label. For details, refer to: [Create a Topic / Tag](#)
5. **Date Range:** These buttons help to filter the data over a specific time span; i.e., 4 weeks, 2 months, 12 weeks, 1 year, 5 years, 10 years, 30 years. You may also create **Custom Date Ranges** to display only those periods which are of interest to you - see [Creating Custom Date Ranges](#)
6. **Views** that have been activated and to which the user has been granted the **Privilege** to access, including:
  - **Standard view:** default clean view which allows to focus on independent analysis.
  - **Stoplight view:** A Stoplight is a visual indicator of how well a Metric is doing. A Metric can have a underperforming, performing, or outperforming Stoplight result that is denoted by different background shading in the various Metric views over time. For more details refer to: [Define a Metric's Stoplight](#)
  - **Statistical view:** The chart is designated with the area of acceptable standard deviation. Those data points that fall outside of this deviation are considered to be anomalies or what we call statistically significant data.



- **Target view** (not shown at the image above): shows whether data point meet the expected results. For more details refer to: [Targets Overview](#)
- **Projection view** (not shown at the image above): Projections provide a view of how results experienced to-date can be used to predict future results based on optional settings established by the Metric's creator. For more details refer to: [Understanding Projections](#)

## 1.2. Additional Options

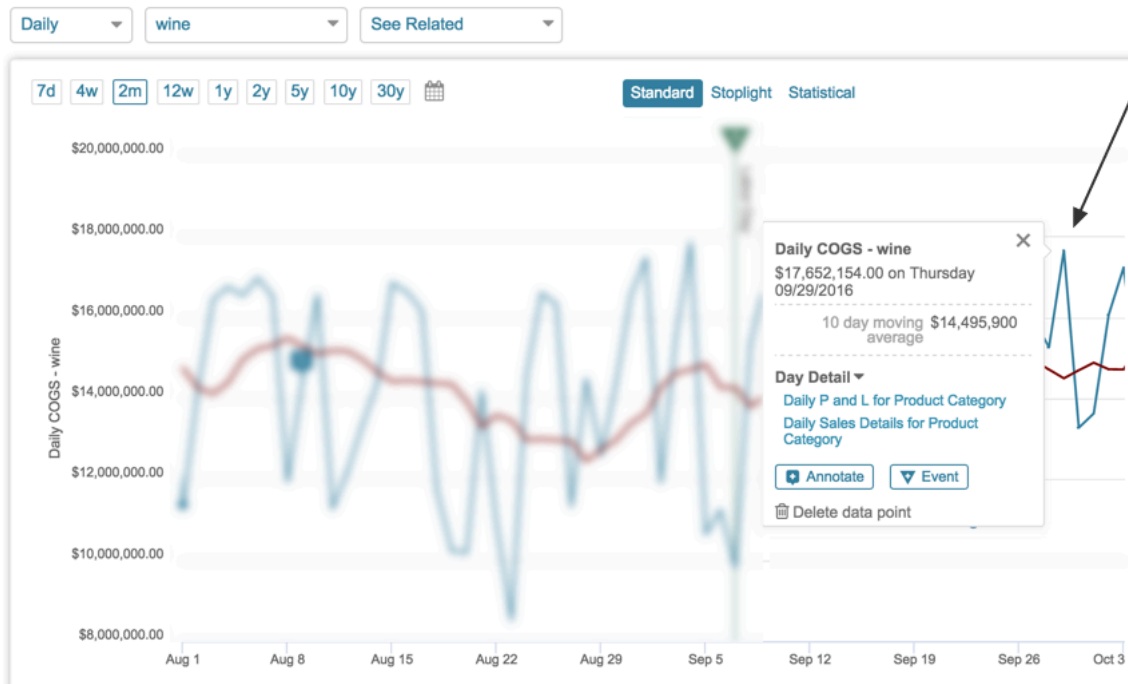


1. **Favorites** button is used to to add or remove the element from a Favorites folder. One element can belong to multiple Favorites folders
2. **Share** button provides a user with two options: **Share right now** (as email) or **Share via Burst**
3. **Download data** button allows to download a file in one of the offered formats
4. **Alert subscription** icon provides access to configure your alerts for this element
5. The **Quick Edit** button allows you to change some of the Chart display options. Only Power and Admin users have access to **Edit option** allowing to configure the Chart

## 1.3. Data Points

### Daily COGS - wine

Daily Sales for a Product Category Metric



Clicking on a data point reveals its context menu, providing details on the given time period, linking to elements necessary for drill-down and further data analysis and options for creating an Annotations or Events (if the Event Calendar is applied to the Metric).

## 1.4. Statistics summary information

The screenshot shows the Metric Insights interface. At the top, there's a navigation bar with 'New...', 'Content', 'Admin', and 'Alex'. Below it, a 'Charting' tab is selected. On the left, a line chart is displayed with a summary box overlaid. The summary box contains the following information:

Summary	
Current value	\$17,360,385.00 Tuesday 11/29/2016
% Change	Down 1.27% from yesterday
10 Day Avg	\$16,488,783.00
Minimum ever	\$344,752.00 Thursday 01/28/2010
Maximum ever	\$20,685,810.00 Monday 11/14/2016
<b>Linked Reports</b> <a href="#">Daily Cost of Goods Sold for Product Subcategory</a> <b>Day Detail</b> <a href="#">Daily P and L for Product Category</a> <a href="#">Daily Sales Details for Product Category</a>	

On the right, the 'Quick Edit' panel is open, showing settings for 'Daily COGS'. The 'Show Summary' checkbox is checked. The 'Save changes' button is visible at the bottom.

**Metric summary information** is added to new Metrics by default.

To enable it for previously created elements or hide it from the Viewer, go either to the *Quick Edit* or to the *Metric Editor*:

1. *Metric Editor* > *Charting* tab > **Show Summary**
2. *Quick Edit* > **Show Summary**

## 1.5. Range selector

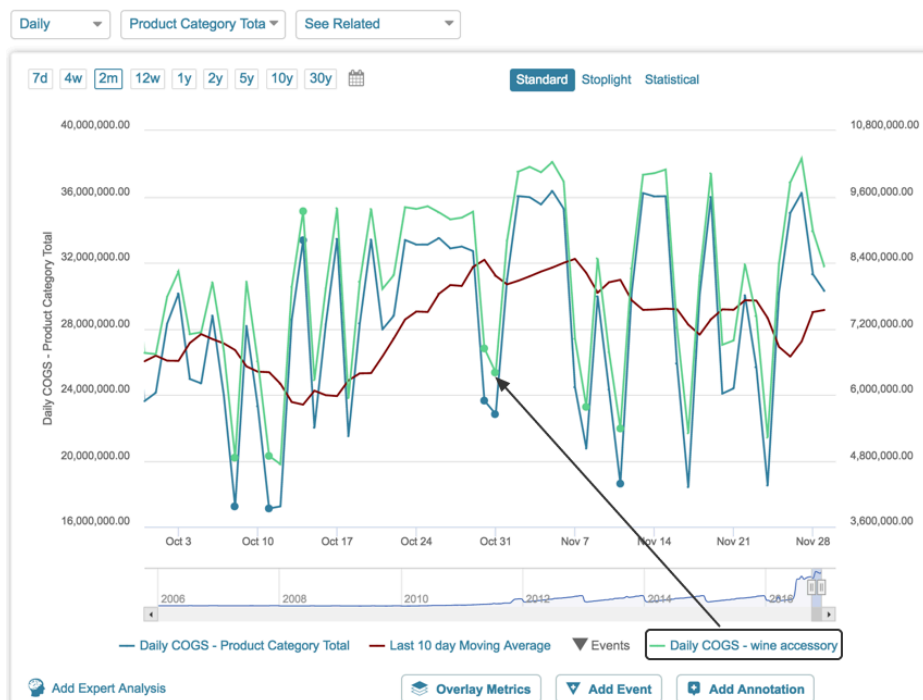


Range selector allows you to quickly define the required time period to display on the Chart Viewer

## 1.6. Legend for Chart lines or bars

### Daily COGS - Product Category Total

Daily Sales for a Product Category Metric



Legends help users to decode the data displayed on the Chart. Legends often include overlaid Metrics, Compare Lines, Events and Annotations. Each overlaid Metric or Compare line may have different color and style which is specified in the Legend

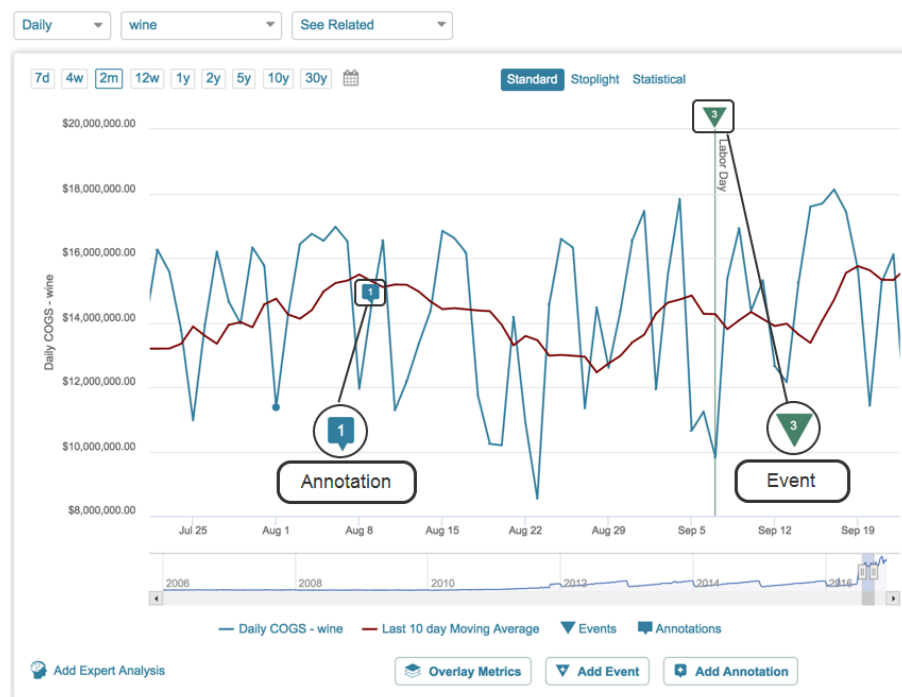
Upon single-clicking the Legend item, a user can hide or display the corresponding Metric, Compare Line, or all Events / Annotations shown at the Chart.

**NOTE:** If the Legend is dimmed, the overlaid item is hidden from the Chart.

## 1.7. Events and Annotations

### Daily COGS - wine

Daily Sales for a Product Category Metric



Events and Annotation can be added to any Data Point of the element

1. **Event** is one or more individual occurrences associated with the Event Calendar. To add an Event, click **Add Event** below the Chart Legend. Added Events are displayed at the Chart and below the Chart in the comments section. **NOTE:** You can only add Events if element is already associated with at least one Event Calendar.
2. **Annotation** allows sharing your insights with other users. To add annotation, click **Add Annotation** below the Chart Legend. Added Annotations are displayed at the Chart and below the Chart in the comments section.

## 2. Element Details

### Details

Last measurement time: Tuesday 11/29/2016

Category: Financial

Business owner: Alex Langton

Data steward: dan couvillon

Technical owner: John Frank

Current Value: 30,291,861.00

Min. Value: 608,279.00

Min. Value reached on: Thursday 01/28/2010

Max. Value: 36,341,068.00

Max. Value reached on: Saturday 11/05/2016

At the very bottom of the Viewer Page the element details are displayed

- Last time period when the element has been updated

## METRIC INSIGHTS

- People responsible for this element (Business owner, optional Data steward, and Technical owner)
- Current value, Max and Min values, etc.

## 4.3 Setting Personal Bookmarks (External Reports)

**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, its Filter combinations are delivered via email.)

💡 External Filters must be set up by the element creator in order for them to be available to you, the viewer.

### 1. Setting Bookmarks for Report Viewer

Personalized Bookmarks can be created from the External Report Viewer. Setup options available in the **Bookmark pop-up** enable Users to override naming and display priority defaults.

The image displays two screenshots of the Tableau Dashboard interface, illustrating the process of setting personal bookmarks.


**Top Screenshot:** Shows the 'Sales (Tableau Dashboard)' view. A callout box labeled 'Filters set by Report creator' points to the filter controls. The filters are: Country (Australia, Canada), Product Category (wine), and Product Subcategory (All Values). The 'Apply Filters' button is visible.

**Bottom Screenshot:** Shows the same dashboard with a callout box labeled 'Reset Filter values to your viewing preferences' pointing to the 'Reset' button. A 'Save Bookmark' pop-up menu is open, showing options: 'Save Bookmark', 'Save as new', and 'Manage Bookmarks'. The filters are now set to: Country (France), Product Category (wine), and Product Subcategory (white wine, champagne).

1. Set the **Filters** to the viewing options you want as your personal Viewing defaults

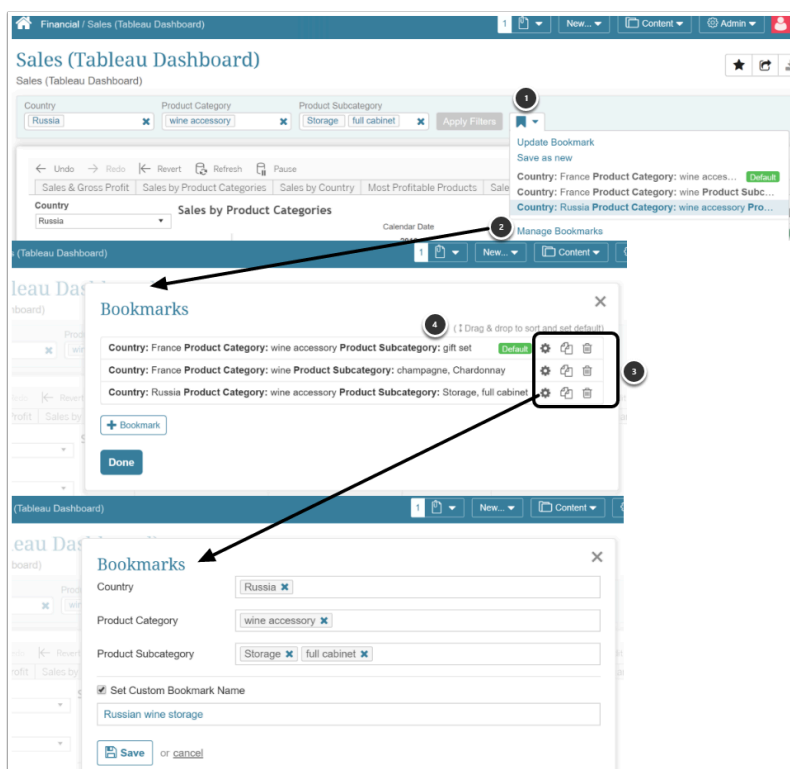
2. Be sure to **Apply Filters**
3. Open the **Bookmark menu** dropdown
4. If this is your first bookmark, select "**Save Bookmark**"; otherwise select **Save as new**
5. Your Bookmark will be given a default 'name' listing on your Filter settings

You can continue to save multiple Bookmarks based on changed filter values. The most recently added will become your default bookmark.

 [6.1.1 new] Bookmarks can be set even if the Metric Insights have been 'hidden' to prevent duplicate Filter display.



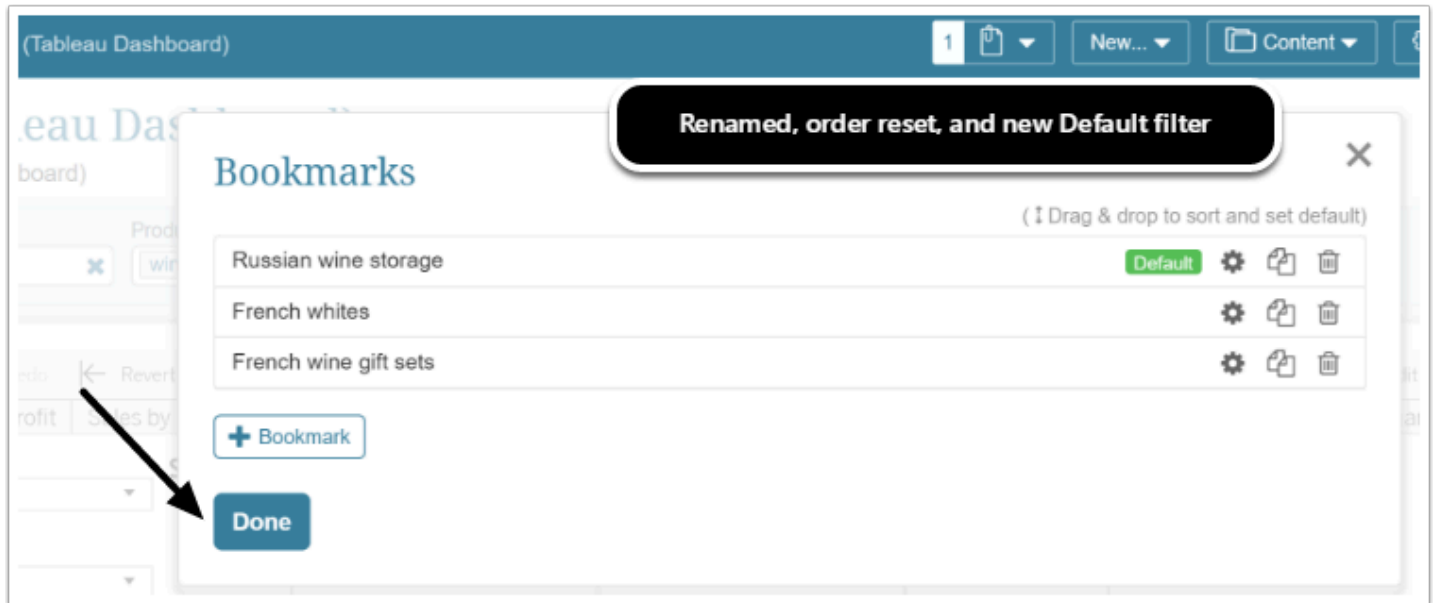
## 2. Managing your Bookmarks - the options



1. Open Bookmark option
2. Select Manage Bookmarks
3. Using icons on the right, you can Edit, Duplicate, or Delete the Bookmarks



4. Use drag-and-drop to reorder and set a default Bookmark—the top Bookmark is always the default.



### 3. Setting Bookmarks for Report Notifications

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

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

## 3.1. Select Notifications icon

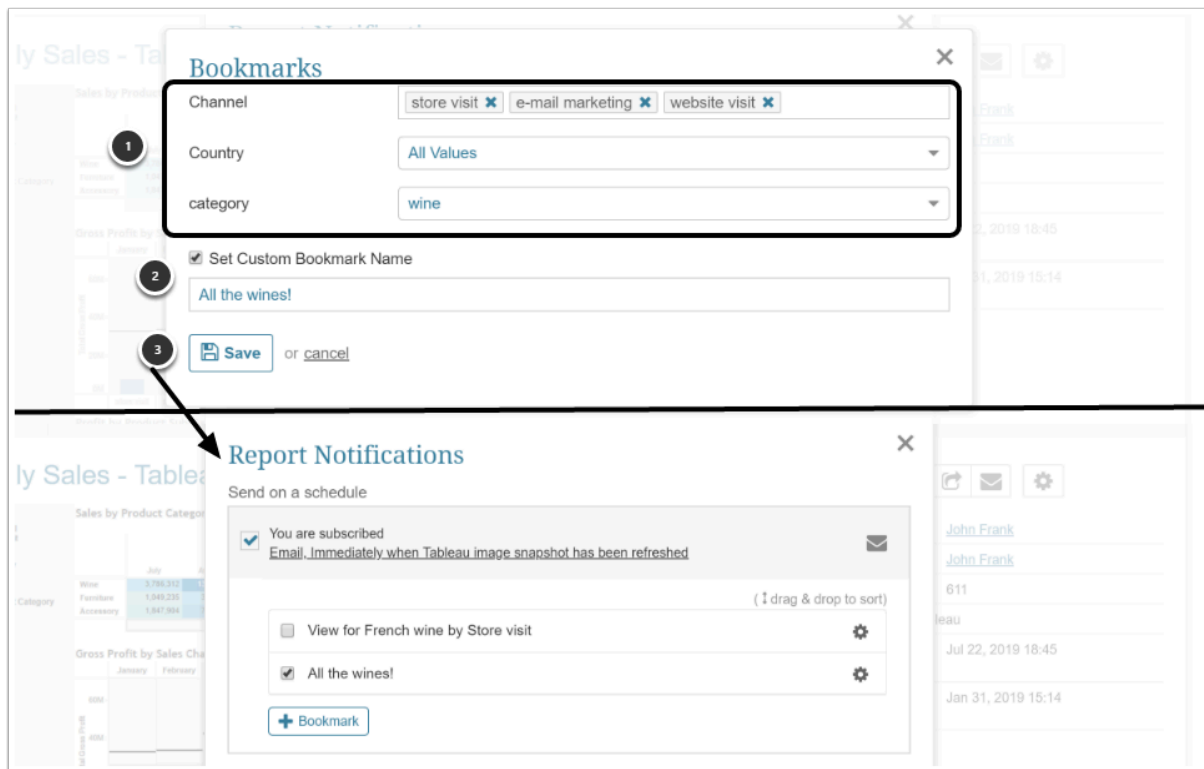
The screenshot displays the 'Daily Sales - Tableau' report in the Metric Insights application. The report includes a table of sales data by product category and a bar chart of gross profit by sales channel. A red circle with the number '1' highlights the notification icon (envelope) in the top right corner of the report. A red arrow points from this icon to the 'Report Notifications' popup. The popup contains the following elements:

- A checkbox labeled 'You are subscribed' which is checked.
- A text field with the email address 'Email Immediately when Tableau image snapshot has been refreshed'.
- A button labeled 'View for French wine by Store visit'.
- A button labeled '+ Bookmark'.

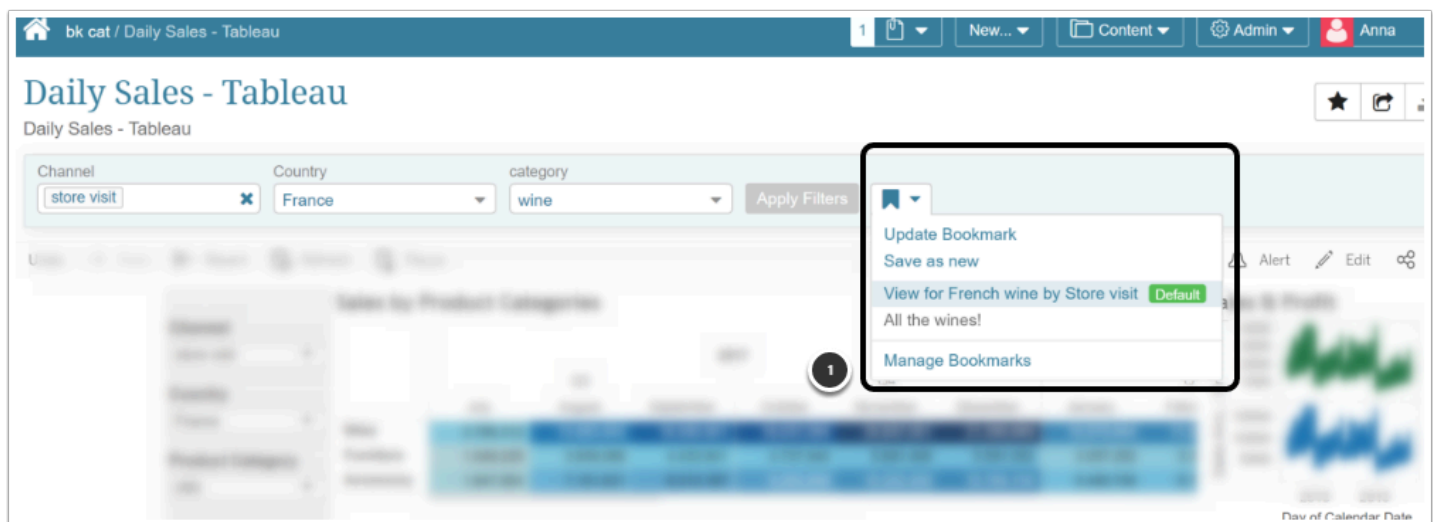
In the **Tile Preview** (or Report Viewer):

1. Click the **Notification icon**
2. You will be subscribed to the Notification. (Optional) Click the envelope on the popup to reset your Notification options.
3. Any Bookmarks set on the Viewer previously will display as options
4. To Create a new **Bookmark**, select [+ Bookmark]

## 3.2. Set and Save your new Bookmark



1. Set your Filter Defaults
2. (Optional) Name your new Bookmark
3. Save



💡 Your Notification Bookmark will also be available via the Viewer, but will not replace your default Bookmark if one was set in the Viewer.

## 4.4 Creating Custom Date Ranges (Metrics)

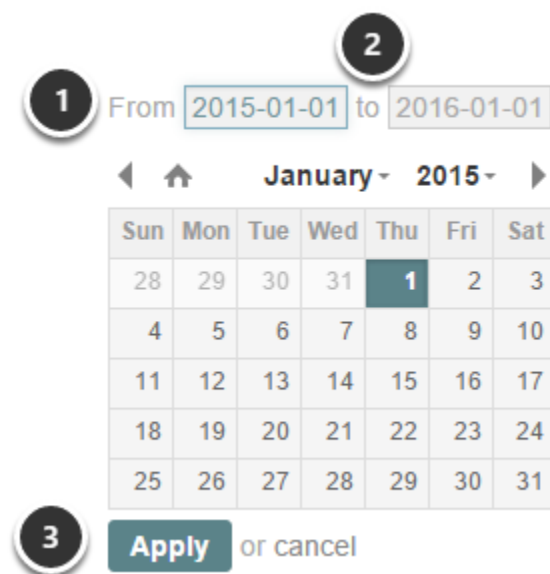
You have the option to configure your Chart Intervals for Metric to view any range of dates you wish.

### Access Custom Date Range function via the 'Calendar' button



1. Click the **Calendar** icon next to predefined Measurements Intervals
2. The calendar opens

## Select required date range from the calendar



1. Point to the **From** field and select the required starting date from the calendar or add it manually
2. Point to the **to** field and select the required ending date from the calendar or add it manually
3. Click **Apply**

## The selected date range is applied to the Metric Viewer



**NOTE:** To clear the selected date range, select one of the predefined Measurement Intervals next to the Calendar icon, or use the slider at bottom of the chart.

## 4.5 Find Related elements from Viewers

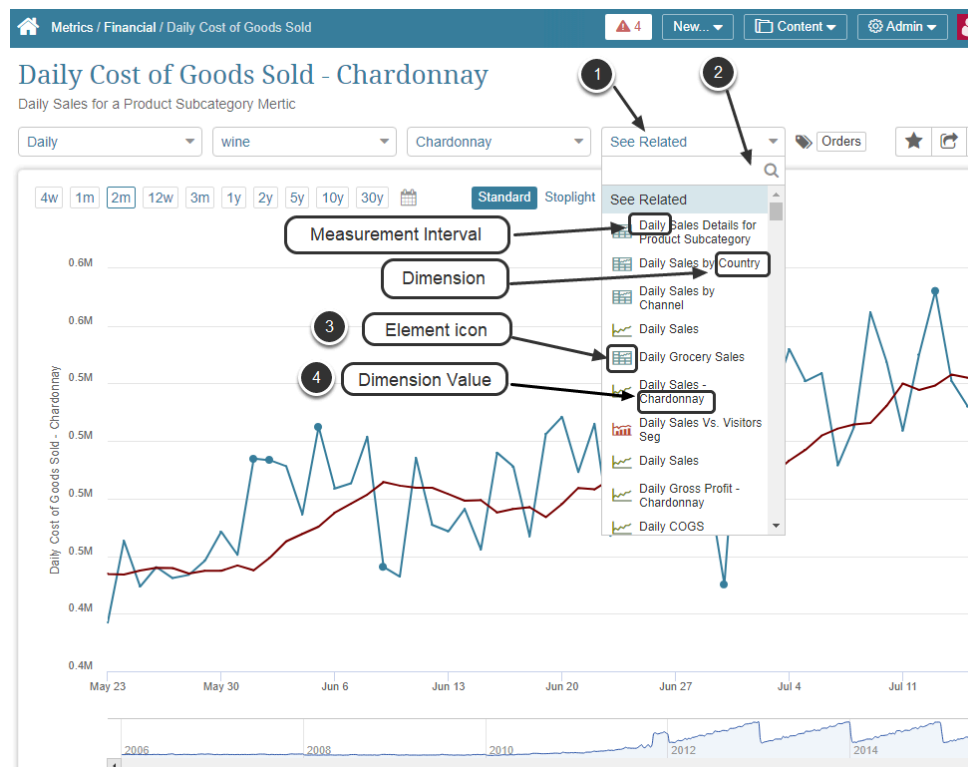
If you want to extend your analysis by looking at other Metrics and Reports that contain the information that may be relevant to the element being viewed, the **See Related** button on the Viewer provides links for immediate access. This drop-down list contains other elements that contain common or similar information.

Selecting links to other elements, one by one, allows you to open and explore other elements and analyze trends to gain more insight into the results. The **See Related** button provides you with quick navigation to the selected element. The **See Related** drop-down list is available on Metrics, Multi-Metrics and Reports.

**NOTE:** The **See Related** drop-down list only contains elements that a user has permission to view






! Currently, only the "Related elements by 'Measurement Interval'" feature is supported in Dataset Reporting.

### 1. Open an Element's Viewer

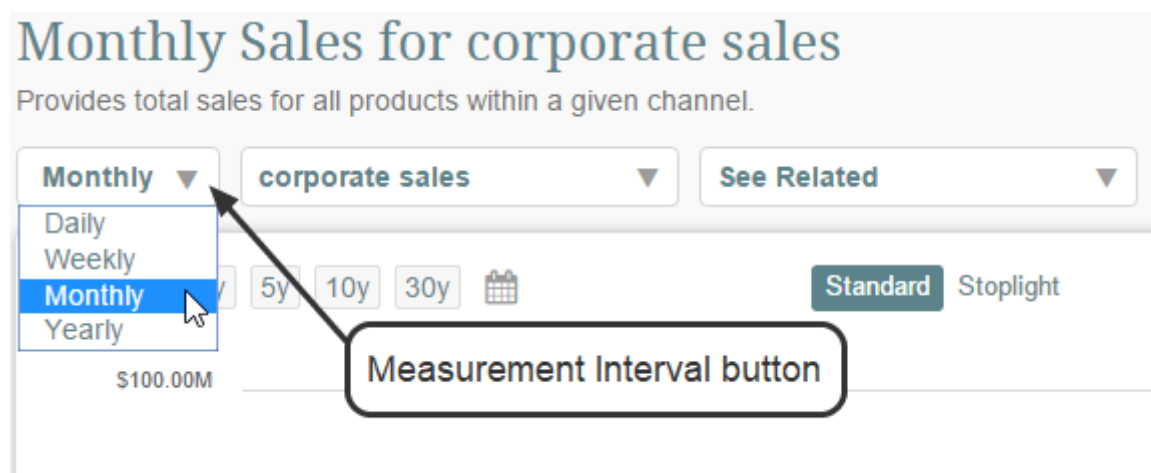


1. To open the list of elements that have common or similar information with the element being viewed, click **See Related**. The drop-down list with elements opens.
2. If you are searching for a specific element(s), enter its full name or key word into the **Search** field.
3. Each entry contains an icon defining the element's type
4. If your element is Dimensioned, related elements with the same Dimension will only display the link for the same Dimension Value. In this example, since your Metric has a Dimension Value of 'Chardonnay', any element that is dimensioned by same Dimension (Product) will link directly to the same Dimension Value. Elements dimensioned by a different Dimension (Channel) will link to the first Dimension Value by default (Australia).

## 1.1. Icons defining element type


Icon	Element Type
	Metric
	Multi-Metric
	Internal Report
	External Report 

## 2. Related elements by 'Measurement Interval'




Monthly Sales for corporate sales

Provides total sales for all products within a given channel.

Monthly  corporate sales  See Related 

Daily  
Weekly  
Monthly  
Yearly

5y 10y 30y 

Standard Stoplight

\$100.00M

Measurement Interval button

**NOTE:** Since the elements based on the Daily, Weekly and Yearly **Measure Intervals** are directly related to this Monthly element, these elements are displayed in the **Measure Interval** drop-down list and are not duplicated in the **See Related** drop-down list

### 3. How is 'See Related' drop-down list populated?

Metrics / Daily Cost of Goods Sold (dimensioned by Product Subcategory)

Info Data Stoplights Alerting Charting Associations Advanced

Measured

Dimension it by

1 Collecting is ☒ enabled ☐ disabled

☒ Make visible on Homepage

Name

Description

2500 character maximum

Category

Certified ☐ yes ☒ no

2 Tags

Start typing to find or create Tags, then press the Enter key to save.

Elements are 'Related' based on settings in the element Editor. Elements appear in the **See Related** list if both of the following conditions are true:

1. The element's **Collecting is enabled** (data is current)
2. Elements have at least one **Tag** in common with your element
3. For Reports only, any '**drill-to**' element will also be included here irrespective of **Tag**. For further information on setting '**drill-to elements**', see [Setup Elements for Further Analysis for a Report](#)

NOTE: Unlike filtering by **Tags** on the Homepage, the element does not need to be **visible on Homepage**; and elements that are **Disabled** will display on the Homepage, but not in the Viewer / **See Related** drop-down

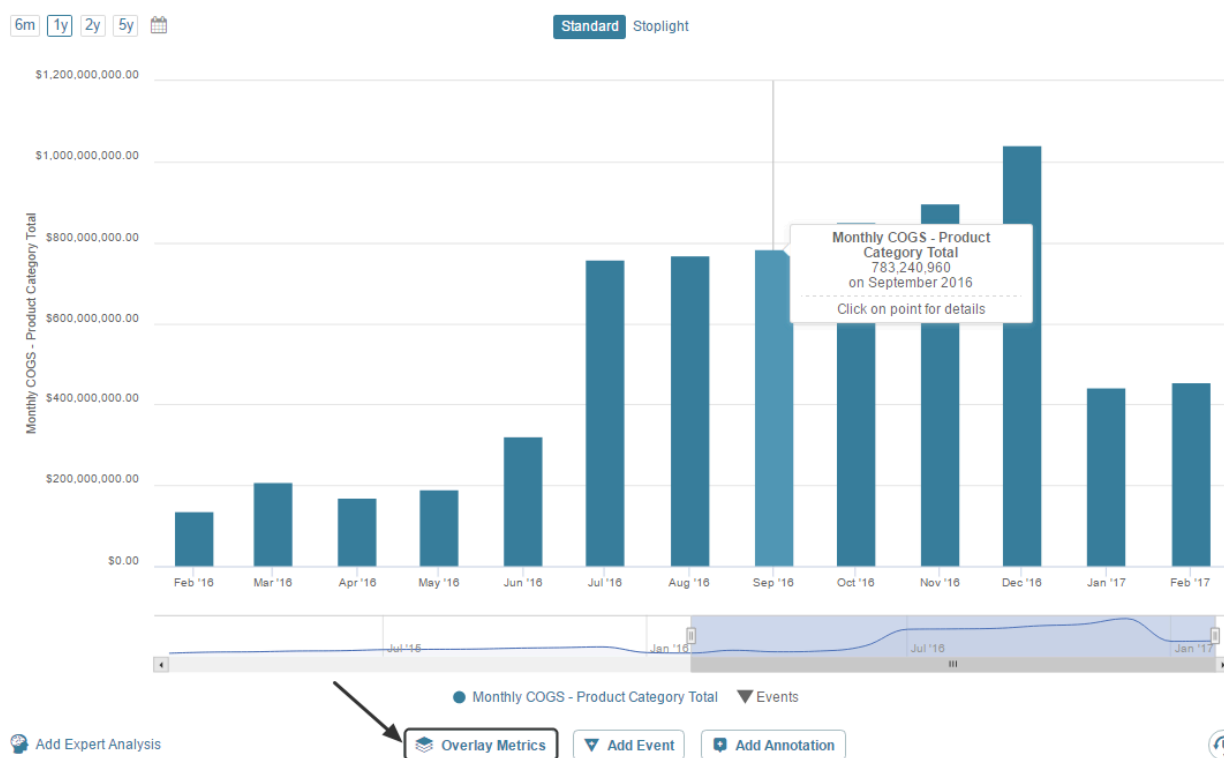


## 4.6 Overview of Metric Overlays

Metric Insights provides the ability to compare a metric to other different metrics in order to spot any emerging trends and review the results of various events. This differs from the **Multi-Metric** elements in that you can manage overlays by adding and deleting them from the main metric without having to actually author a new element.

This section provides an overview of this feature, with links to provide more detail as needed.

### 1. Accessing Metric Overlays



To add an overlay Metric to your Chart, click **Overlay Metrics** below the Legend of this Chart. The *Overlay Metrics* pop up opens.

## 2. Managing Overlays pop-up example

Overlay Metrics ×

There are no overlaid Charts

+ Add Metric

Display Mask of Left Axis

\$1,234.57

There are no Compare Lines

+ Add Compare Line

Event Calendars

Event Calendar

☒ Sample Holidays

☐ Make these Overlays the starting point; i.e., default, for all Users

☐ Apply to all dimension values

Save

## 3. Adding Overlay Metrics

Add Overlay Metrics ×

1

Filter results

Category All Categories Filter by Product Category

2

☐ Monthly COGS - wine

☒ Monthly COGS - wine accessory

☐ Monthly COGS - wine furniture

☐ Monthly Gross Margin - Product Category Total

☐ Monthly Gross Margin - wine

☐ Monthly Gross Margin - wine accessory

☐ Monthly Gross Margin - wine furniture

☐ Monthly Gross Profit - Product Category Total

☐ Monthly Gross Profit - wine

3

Add Selected

 or [cancel](#)

At the *Add Overlay Metrics* screen you can select one or several Metrics to be added to your original Metric

**NOTE:** Only Metrics of the same measurement interval can be added to your original Metric (Daily, Monthly, etc.)

To add overlay Metrics, perform the following steps:

1. To quickly find the required Metric, limit your choices by adding key words or a name of the specific Metric in the **Search** field, selecting a certain **Category** or specifying other criteria (such as, Acquisition Channel, Country, Product Category, etc.) in the **Filter by** field
2. Check the boxes of the required Charts to add them to the original Chart
3. Click **Add Selected** to overlay the original Metric with selected ones

### 3.1. Editing Overlay Metrics

The screenshot shows the 'Overlay Metrics' interface. At the top, there's a title 'Overlay Metrics' with a close button. Below it is a table titled 'Overlaid Charts' with a legend 'Just Added or Updated Charts'. The table has columns: Chart, Line/Bar, Type, Axis, Color, and a settings icon. One row is visible: 'Monthly COGS - wine accessory', 'line', 'right', '#63d18f'. Below the table is a '+ Add Metric' button. An arrow points from the settings icon in the table to the 'Overlay options' modal. The modal has a title 'Overlay options' and a close button. It contains four numbered steps: 1. Color (input field with '#63d18f' and an eyedropper icon), 2. Type (radio buttons for 'line' and 'bar'), 3. Line type (dropdown menu with 'Line'), and 4. Axis (radio buttons for 'left' and 'right'). At the bottom of the modal are 'Save' and 'cancel' buttons.

To edit the Overlay Chart, click **Change Overlay Chart options** button for the corresponding metric as shown in the left picture. The *Overlay option* screen opens.

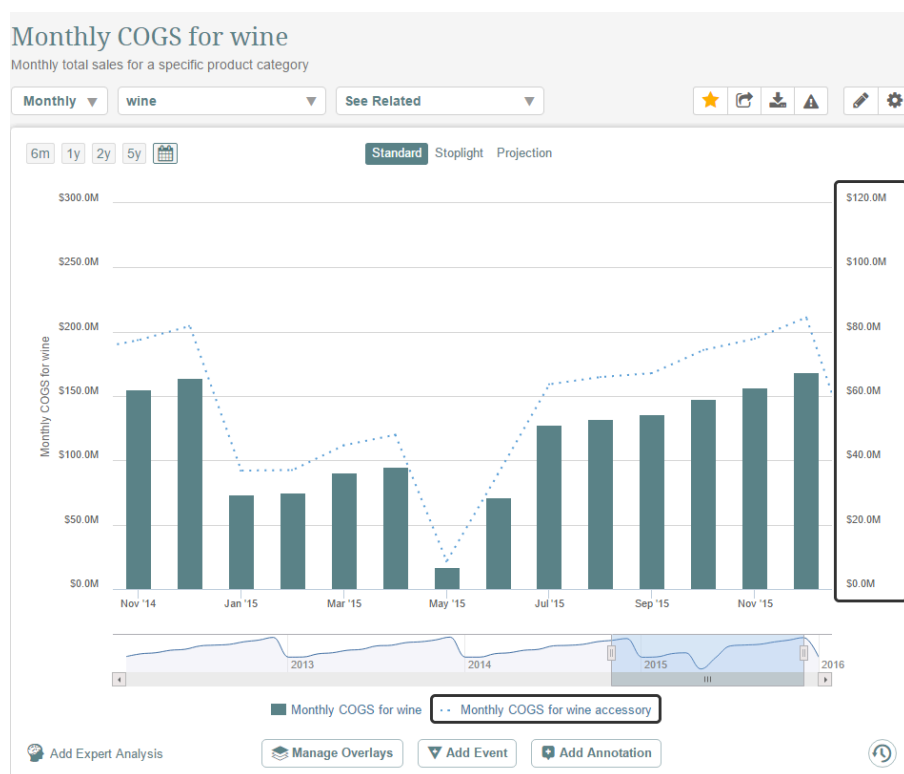
You can customize the look of the Overlay Chart by changing the following parameters:

1. **Color.** If several charts are laid over the original one, every additional metric is going to be of its own color. To change the color of the metric, click the **Eyedropper** button to the right of the **Color** field and single-click a new color from the palette to select it.
2. **Type.** Select how you want your chart to be displayed. The available view options are: 'line' and 'bar'.

3. **Line Type.** This field is shown only if 'line' value is selected in the field above. The line of the Overlay Metric can be dashed, dotted, etc. You can select different line types for different overlay charts.
4. **Axis.** It is recommended to place the **Axis** of the Overlay Chart on the right side of the original chart.

Click **Save** to keep the changes made.

## 3.2. Display Masks of Left and Right Axes



In the example above we have added **Monthly COGS for wine accessory** chart to the original **Monthly COGS for wine** chart. The **Monthly COGS for wine accessory** chart is shown as a dotted line and its Axis is displayed to the right of the chart.

**NOTE:** To hide the Overlay Chart, single-click its Legend below the chart. When the Overlay Chart is hidden, its Legend is shaded.

## 4. Adding Compare Lines to your Metric

### Add Compare Lines



<input type="checkbox"/>	Last Month
<input type="checkbox"/>	Same Time 3 Months Ago
<input checked="" type="checkbox"/>	12 Months ago

**Add Selected** or [cancel](#)

Compare Lines can be added to analyze current metric and the same metric at some point in the past.

Check the box(es) for one or several time periods in the list.

Click **Add Selected** to add Compare Lines to the original Chart.

### 4.1. Editing Compare Lines

#### Overlay options



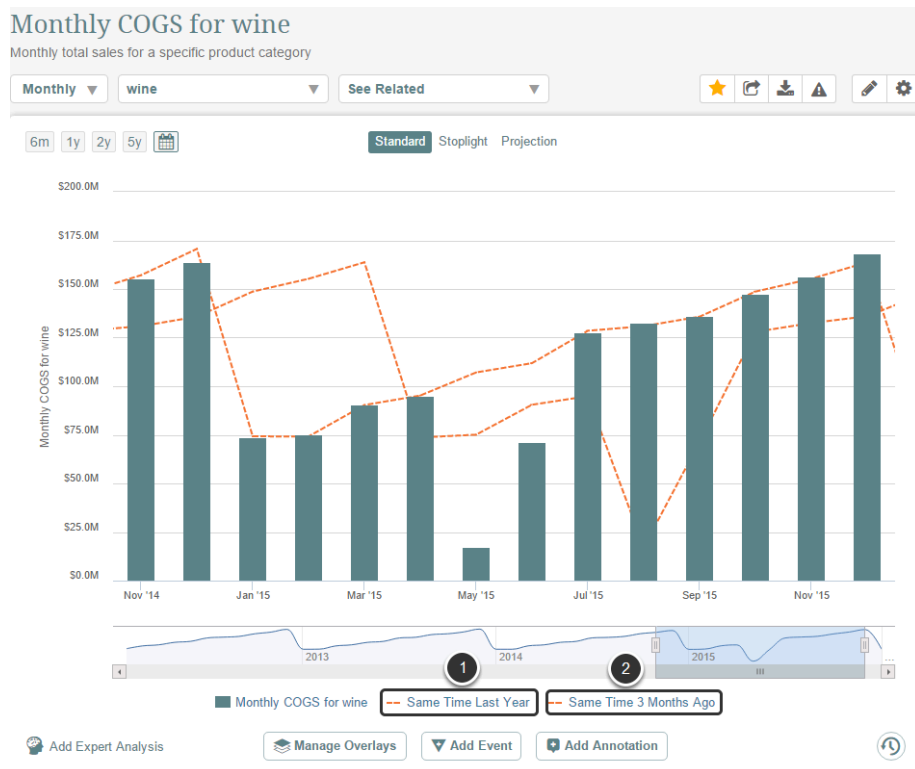
1	Color	<input type="text" value="#f97533"/>	
2	Line type	<input type="text" value="Short dash"/>	▼

**Save** or [cancel](#)

The Compare Lines editing options include:

1. **Color.** If several Compare Lines are laid over the original Chart, they are usually of the same color. To change the color of the Compare Line, click the **Eyedropper** button to the right of the **Color** field and single-click a new color from the palette to select it.
2. **Line Type.** Compare Lines can be dashed, dotted, etc. You can select different Line types for different Compare Lines.

## 4.2. Example of Compare Lines

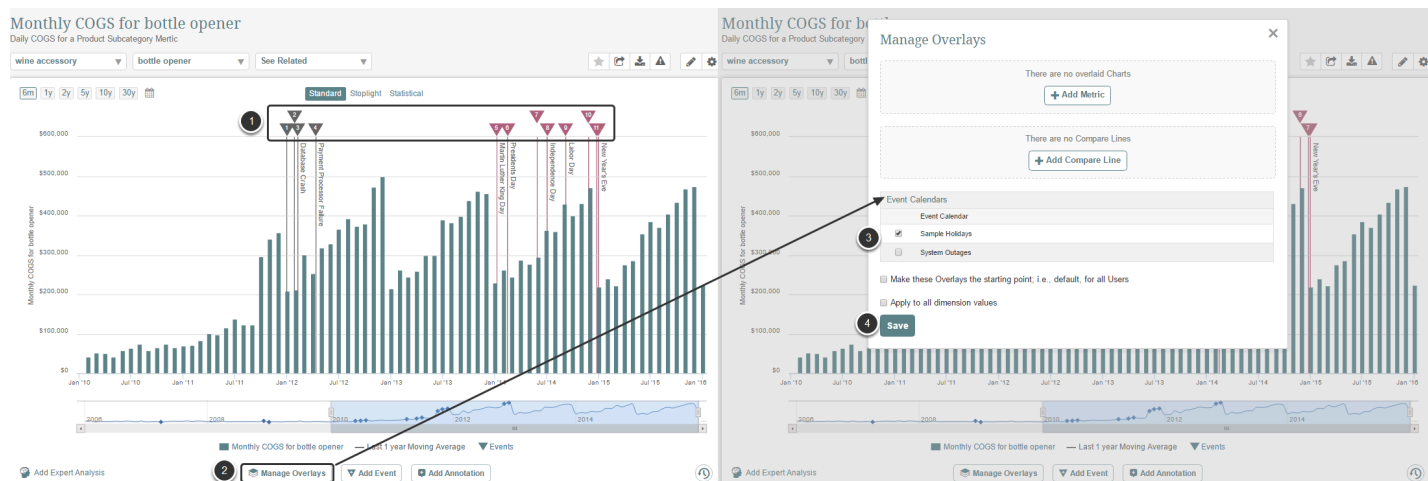


In the example above you can see a Chart with two Compare lines:

1. **Same Time Last Year**
2. **Same Time 3 Months Ago**

**NOTE:** To hide the Compare Line, single-click its Legend below the chart. When the Compare Line is hidden, its Legend is shaded.

## 5. Associated Event Calendars





1. Events from different Event Calendars are usually shown in different colors
2. If you wish to hide events from a specific calendar from the Chart, click **Manage Overlays** below the Metric **Navigator**. The pop-up screen opens
3. Find an **Event Calendars** grid and define which of the calendars should be displayed at the Chart
4. **Save** your changes

## 6. Overlay Options

Manage Overlays

Key: Just Added or Updated Charts

Overlaid Charts					
Chart	Line/Bar	Type	Axis	Color	
Monthly COGS for wine accessory	line		right	#5aa0db	 

Page

1

of 1

Displaying records 1 - 1 of 1

+ Add Metric

Compare Line overlays		
Compare Line overlays	Type	Color
Same Time 3 Months Ago	Short dash	#f97533
12 Months ago	Short dash	#f97533

Page

1

of 1

Displaying records 1 - 2 of 2

+ Add Compare Line

1

☐ Make these Overlays the starting point; i.e., default, for all Users

2

☐ Apply to all dimension values

Save

Once the necessary Overlays are added to the chart, their displaying options can be configured as follows:

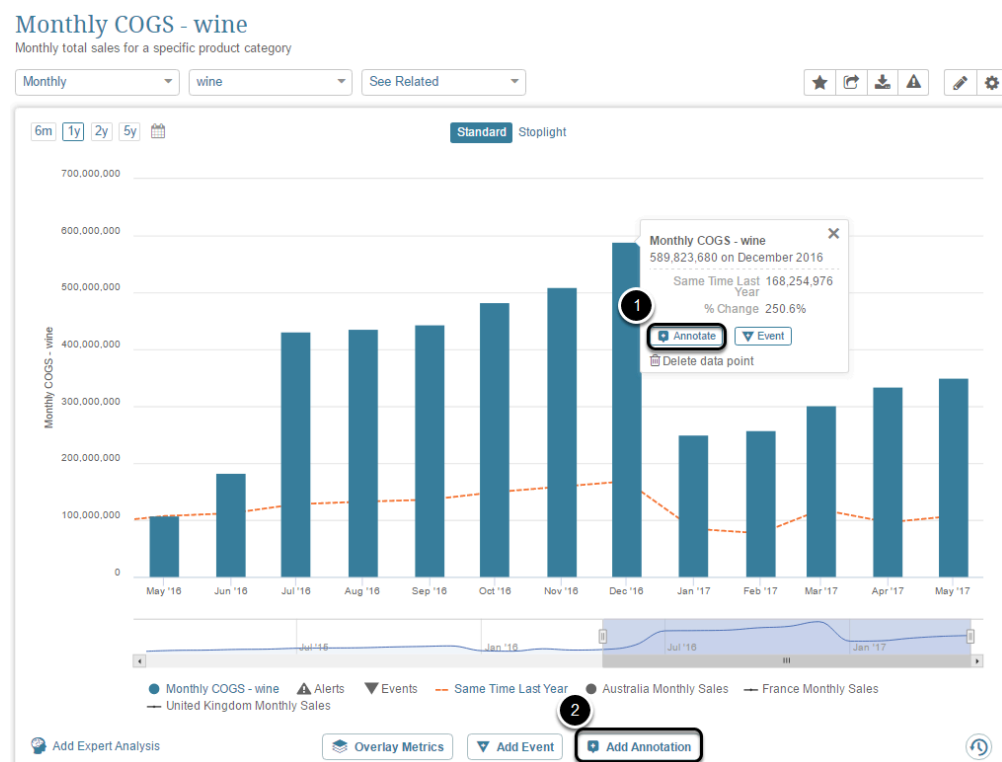
1. **Make these Overlays the starting point** - If this box is checked, all users, who open this chart are going to see added overlays.
2. **Apply to all dimension values** - If this box is checked, added overlays are going to be displayed at the charts of all dimension values. If the Metric is not dimensioned, this field is not shown at the *Manage Overlays* screen.

## 4.7 Adding Annotations to Elements

Annotations allow you to share your insights on a Metric or Report with other users. You can apply an annotation to a single date point or to a range of dates. You may easily apply your annotation to a broad set of elements.

**!** To be able to create Annotations, Power Users must have either *View or Edit Access* to element **as well as the Add Annotation Privilege**.

### 1. Access Metric Viewer > Add Annotation



Access the **Add Annotation** pop-up by either:

1. Clicking on an existing Datapoint > select **Annotate** button
2. Clicking on the **Add Annotation** button beneath the Chart

### 2. In the 'Add Annotation' pop-up select either 'Data Point' or



## 'Time Period' option

Add Annotation
×

Annotate
☐ data point
☒ time period

Annotation start Date

Annotation finish Date

Annotation text

Please write your Annotation...

1000 characters left

Show on other Metrics
☒ just this Metric
☐ other Metrics

Close

## 3. Provide the information required to create an Annotation

Add Annotation
×

Annotate
☐ data point
☒ time period

1 Annotation start Date

Annotation finish Date

Annotation text

Please write your Annotation...
2

1000 characters left

3 
4

5 Show on other Metrics
☒ just this Metric
☐ other Metrics

Close

In this example, we've selected 'Time Period' in the **Annotate** field in order to display both the start date and the finish date

1. Use the **Calendar** icons to select **Annotation start Date** and **Annotation finish Date**
2. Add your text. Note, that if you want to change text formatting or add a link, you need to use Markdown. To learn the basics of Markdown syntax, click the **M↓** icon at the top right corner of the text field
3. If you wish to notify others about this Annotation, you may do so here. See [The Share function](#) for more details.
4. You also have the option to attach a file to provide more details to your annotation
5. You can add this annotation only to the current Metric or to other Metrics as well. For more information see the following Step

## [NOTE] If other elements are affected, select them to add the same Annotation

**Add Annotation** [X]

Annotate ☒ data point | ☐ time period

Data on 2016-02-18

Annotation text  
Please write your Annotation...

1000 characters left

Notify others Attach files

Show on other Metrics ☐ just this Metric | ☒ other Metrics

1 Include all Metrics In the Financial category

2 Show on Charts that are ☒ Daily ☒ Weekly ☐ Monthly ☐ Quarterly ☐ Yearly  
☐ Month To Date ☐ Quarter To Date

3 Applied to the elements

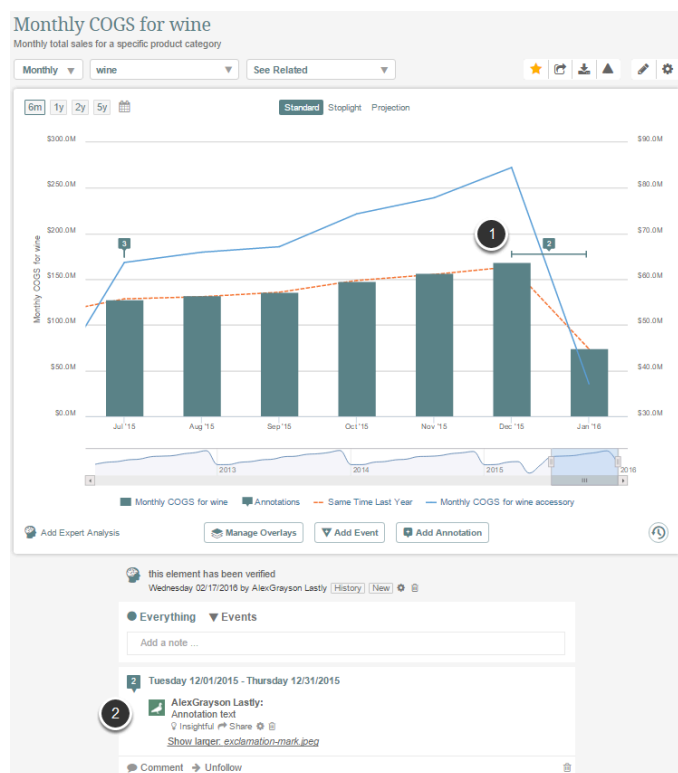
- ☒ #1761 - 0311 alerts test for wine
- ☐ #1761 - 0311 alerts test for wine furniture
- ☒ #1761 - 0311 alerts test for wine accessory

Close

If in the **Show on other Metrics** field the 'other Metrics' option is selected, the following additional fields are displayed:

1. This drop-down allows you to select related metrics based on various criteria (e.g. Measure of, Topic, Category)
2. You can restrict your element choices based on Measurement Interval
3. Check and un-check elements to add the same annotation to their charts

## 4. View your Annotation below chart



1. Annotation range is indicated on Chart
2. Details on annotation appear below the chart allowing others to comment on your annotation

## Adding Annotations for future dates

Users can easily add Annotations for a Metric's data points for which data has not been collected yet. This is helpful when a user knows something will be happening during the current or future period. The annotation will appear on the Chart and at the *Homepage > News View* when data is collected for that period; until then, the annotation can be viewed on the Metric Viewer below the actual chart as show below.

**NOTE:** Display of **Future Annotations** is controlled based on the last data point collected, regardless of how OLD that data is.

## You will receive a warning when adding annotations to dates in the future

### Future Annotation

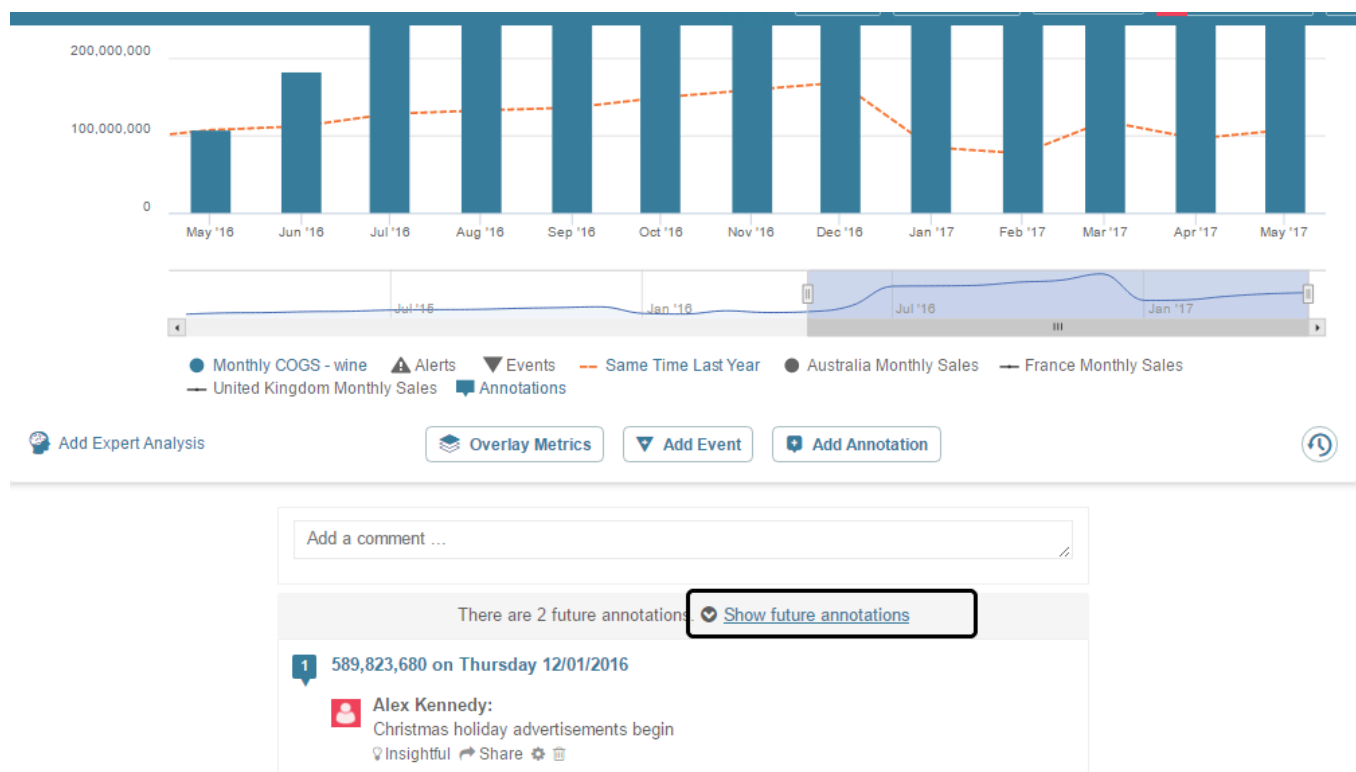


You added an Annotation for 06/15/2017 at 12:00AM. The current chart is only showing data through 05/01/2017 at 12:00AM.

Your Annotation will appear once we have collected additional data.

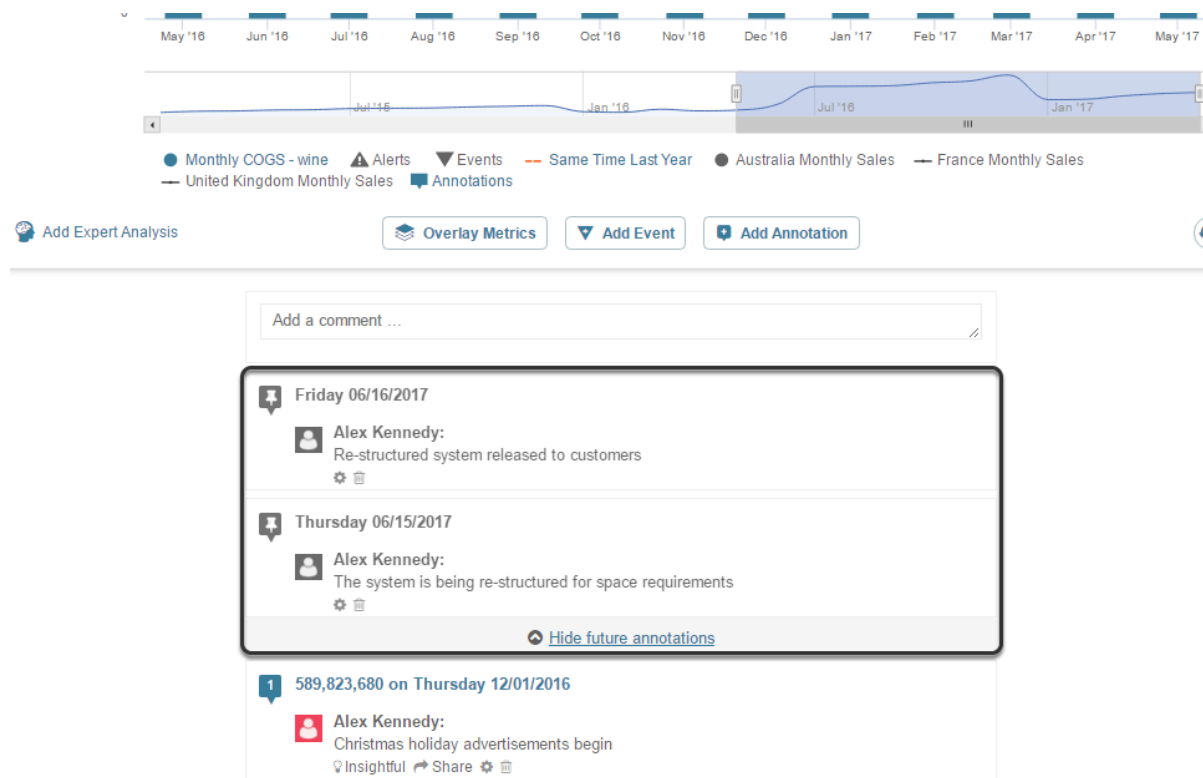
**OK** or [cancel](#)

## Viewing future Annotations below the Chart



As the Chart does not have a data point to which to 'attach' the annotation, information related to future annotations is displayed in the Event/Annotation/Comment section below the Chart as shown in the image above. To see the details of future annotations, click **Show future annotations**

## Example of future Annotations



**NOTE:** Future annotations have a different icon

## 5. Working with Folders & Bursts

# 5.1 Understanding Folders

## Purpose

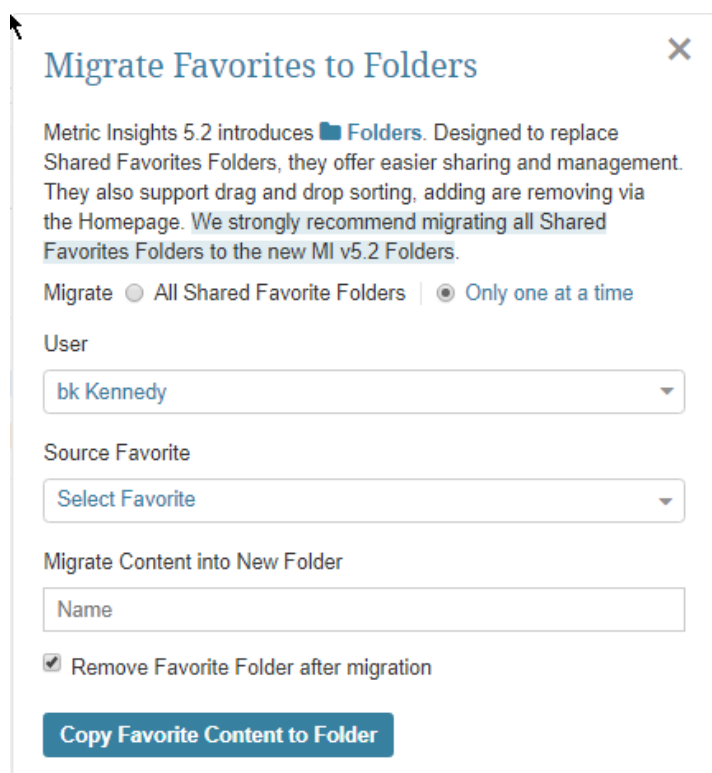
With Release 5.1, Metric Insights offered Favorites, Shared Favorites, Bursts, and Standard Notifications (Immediate, Daily, Weekly, Monthly).

The new 5.2 Folders feature is designed to unify these approaches for content and distribution management into one system of **Folder management**. It allows users to set a preference to only display personal Favorites and Shared Folders on their Homepage rather than always seeing all Categories that contain content to which they have access.

## Objectives

- Simplify mechanism for organizing, sharing, and distributing content
- Remove the confusion between Favorites, Shared favorites, and Bursts
  - Eliminate Shared Favorites and replace with personal favorites and folders concepts
- Make usage of Bursts more intuitive
  - Allow users to burst both folders and collection of elements
  - Make bursting accessible through the notifications pop-up

## Impact on Favorites



**Migrate Favorites to Folders** ✕

Metric Insights 5.2 introduces **Folders**. Designed to replace Shared Favorites Folders, they offer easier sharing and management. They also support drag and drop sorting, adding and removing via the Homepage. We strongly recommend migrating all Shared Favorites Folders to the new MI v5.2 Folders.

Migrate ☐ All Shared Favorite Folders | ☒ Only one at a time

User

Source Favorite

Migrate Content into New Folder

☒ Remove Favorite Folder after migration

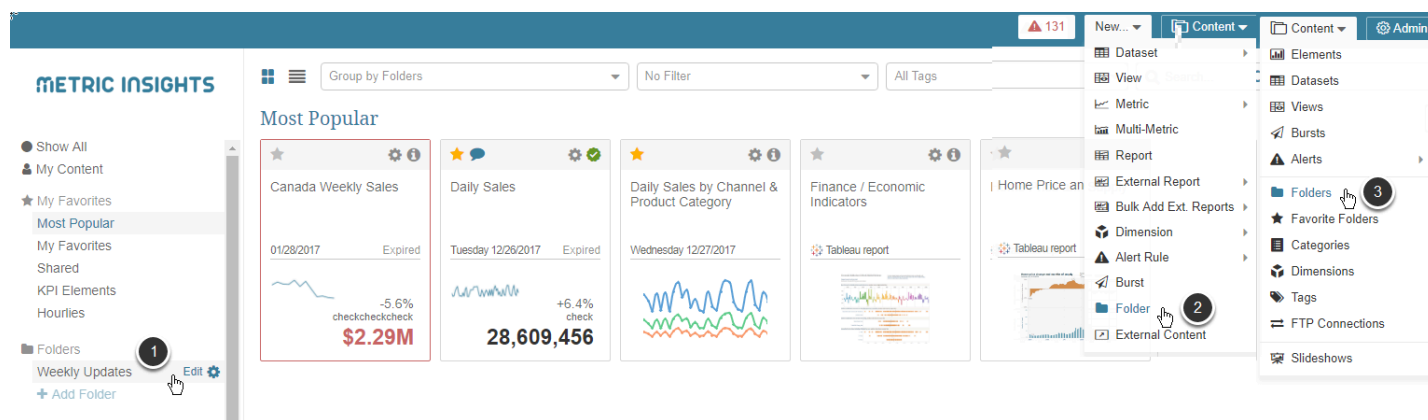
**Copy Favorite Content to Folder**

- Users receive their default “My Favorites”
- Users can also create additional personal Favorites
- Users can NO LONGER share their personal Favorite Folders
- Using the path Admin menu > Utilities > Migrate Favorites to Folders, Admins are provided with a migration utility to convert existing Shared Favorites to Folders:

## Key Feature Capabilities

- **Users can manage their own content of interest by creating a Folder and choosing to display its content in their Homepage and/or distribute the content to others via. a Burst and selected Notification Schedule**
- Power Users and Admins can create and manage Folders and distribute their content to Group members or individual users on a Burst and its selected Notification Schedule.
  - Options include either or both of the following:
    - Ability to show a Folder on the Homepage of those with whom it is shared
    - Permission for Power Users to Add/Remove Folder content
- Power Users and Admins can define Bursts for both Folders and for a collection of elements and select individual Dimension Values of Dimensioned elements.
- [5.2.1] Admins can sort the Folders for all Users

## Folder Editor



**Access via Edit gear on Homepage, or New>Folders, or Content>Folders**



Folder / Weekly Updates

131
New...
Content

Content
Sharing
Bursting

Folder Name
Weekly Updates

Description

Weekly Updates

Daily Sales
Daily Sales by Channel & Product Category
Day Order Volume by Channel
Day Order Volume by Product Category

1
Add Content
Add Sub-Folder
3

2
☒ Visible on Homepage

The new Folder Editor allows Admins and Power Users to modify a Folder's contents and sharing settings using three tabs:

**Content Tab** - allows users to:

1. Add content to the Folder
2. Set option to hide or display on Homepage for all users
3. Add Sub-Folders (child)

Folder / Weekly Updates

131
New...
Content
Admin
Alex

Content
Sharing
Bursting

Any changes to content will impact 1 other user.
+
Saved

Share with Groups

No Groups have been added to this Folder
Add Group

Users with Folder on Homepage

All Groups

Users with Folder on Homepage

Name	Source
abby Kennedy	
Alex Kennedy	

Add User

Users who Can Add/Remove Content

All Groups

Users who Can Add/Remove Content

Name	Source
Abby Johnes	

Add User

**Sharing Tab** is used to:

1. Specify Users or Groups that can see the Folder on their Homepage
2. Specify Users or Groups that can Add/Remove its Content (i.e., Edit Access):

**Bursting Tab** is used to manage (Add or Delete) the burst(s) that deliver the contents of the Folder as a payload

💡 For details on Adding a New Burst, see [Create New Burst](#)

## Managing (sorting) Folders on the Homepage (Admins only)

Access via Content > Folders to get list of existing Folders

1. Use customary Drag and Drop method to change display order
  1. In this example, 'Key KPIs' will be dragged to between the 'Marketing' and the 'Finance' folders
2. New Folders will always be added to the bottom of Folder display
3. This display order is set for all Users

**i Only the top-most level of Folder can be managed here**

- Sub-folder order can be changed via Drag and Drop on the Folder Editor for a specific Folder > Contents tab
- The elements within a Folder are always sorted alphabetically

## Dimensioned Elements

The screenshot shows the 'Folder / Weekly Updates' editor. At the top, there's a header bar with a home icon, the folder name 'Folder / Weekly Updates', a warning icon with '131', a 'New...' dropdown, and a folder icon. Below the header, there are tabs for 'Content', 'Sharing', and 'Bursting'. A notification box states: 'Any changes to content will impact 1 other user.' The main form has fields for 'Folder Name' (containing 'Weekly Updates') and 'Description'. Below these is a list of dimensioned elements, each with a folder icon and a text label: 'Weekly Updates', 'Daily Sales', 'Daily Sales (dimensioned by Product Subcategory)', 'Daily Sales by Channel & Product Category', 'Day Order Volume by Channel', 'Day Order Volume by Product Category', 'Weekly Readmission Penalties (dimensioned by Hospital)', and 'Weekly Revenue (dimensioned by Sales Channel)'. To the right of this list is a popup window titled 'All Values' with three 'All Values' entries, each preceded by a dimension icon. At the bottom of the list are two buttons: 'Add Content' and 'Add Sub-Folder'. Below the list is a toggle switch labeled 'Visible on Homepage' which is currently turned on.

These elements are shown with a Dimension icon that allows a user to select one or more (or all) Dimension Values to be included in the Folder.

When user clicks the icon, a popup allows Dimension Values to be included or excluded.

## Security

- **Groups** as well as both Regular and Power Users can be granted one or both of two new **Privileges**:
  - Share Folders
  - Add Folders
- For a given Folder, either Regular or Power Users can receive **Permission** to:
  - See the Folder on the user's Homepage


- Add/Remove content from the Folder

 For more information , see: [New 5.2 Security table](#)

## 5.2 Create New Burst

Bursts can be set up and managed using a single, consolidated editor. Users can select an arbitrary set of Elements (Reports, Metrics, etc), designate an arbitrary set of recipients, and schedule delivery based on a user-defined schedule, all through a single editor.


Note: Other versions of these screens may appear slightly different or have more or fewer options available. Screenshots below are of Version 5.2.1. For earlier versions see [Create a new Burst \(prior to Version 5.1.2\)](#)

 New in 5.6: 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. See how to apply these new filters in the **Setting Filter Defaults on Burst Editor** section of [Pre-filtering BI tools \(External Reports\)](#).

### 1. Access New > Burst

Three options are available for adding content to a Burst:

1. One or more Favorite Folders including all elements contained in them
2. Specific Tiles
3. [5.2.1 version] Folders including all elements contained

 For more information on Bursting with Folders, see [Understanding Folders](#)

## 1.1. Content: Favorite Folders

The image shows two screenshots of the 'My Notifications / New Burst (6)' interface. The top screenshot displays the initial form with the following elements:

- Name:** A text field containing 'Sample Burst'.
- Content:** Three radio button options: 'Selected Tiles' (disabled), 'Folder' (disabled), and 'Favorites' (selected).
- Send as:** Two radio button options: 'a single large email' (selected) and 'Individual emails'.
- Buttons:** 'Send now' and 'Save' buttons.
- Instruction:** 'Click below to add your first favorite' with a '+ Add Favorite' button.

The bottom screenshot shows a 'Select Favorite Folders' pop-up window with the following elements:

- Search:** A 'Filter results' search bar.
- Actions:** 'Select all' and 'Select none' buttons.
- Folder List:** A list of folders with checkboxes: 'Most Popular' (unchecked), 'My Favorites' (checked), and 'My BI Content' (checked).
- Buttons:** '+ Add selected' and 'or cancel' buttons.

An arrow points from the '+ Add Favorite' button in the top screenshot to the 'My Favorites' folder in the bottom screenshot.

Select your content by adding elements from your Favorites folders:

1. We recommend providing a meaningful **Name** to your Burst since it is going to be used as an email header once notifications are sent.
2. **Content:** As this is an example for favorite folders, select the corresponding option. The example for "Selected Tiles" and "Shared Folders" are shown in the steps below.
3. **Send folders as:** define whether each of the favorite folders that you are going to include in this Burst should be sent in individual emails or all of them should be sent as one large email.
4. Click **[+ New Folders]** and in the opened pop-up choose which of the folders are supposed to be included into the Burst.

Once done with selection, click **[+ Add selected]**.

**i** Elements that are actually seen in each Burst email are subject to the Security Rules for each recipient

## 1.2. Content: Shared Folders [Version 5.2.1]

The screenshot displays the 'My Notifications / New Burst (8)' interface. The top navigation bar includes 'Content', 'Customize', 'Run History', and 'Subscriptions'. The 'Content' tab is active, showing options for 'Selected Tiles', 'Folder' (selected), and 'Favorites'. A 'Select Folder' button is visible. The 'Schedule' field is set to 'Daily M-F (On Thu at 16:13)'. The 'Send Burst via' section shows 'Email' selected with the template 'Burst - Any Image Size (default)'. Below this, 'FTP' and 'Drive' options are listed. A 'Folders' modal is open, showing a search bar and a list of folders: 'Monthly Revenue data' and 'Top Movers'. A black arrow points from the 'Select Folder' button to the 'Folders' modal.

1. Select '*Folder*' in the **Content** field
2. Clicking on '*Select Folder*' will open a list of Folders that are visible on your Homepage. Admin Users will have choice of all Shared Folders created, not just the ones that are shared with the Admin User
3. Select a single Folder by clicking on the its Name.
4. As seen below, all of the elements from that Folder will be burst

My Notifications / New Burst (8)

3

New...

Content

Customize

Run History

Subscriptions

Send now

Save

Save

Name

New Burst (8)

Content

☐ Selected Tiles

☒ Folder

☐ Favorites

Top Movers

Top Movers (created by a)

Daily Peak Website Visits

Daily Sales from Qlik Sense (dimensioned by Country)

Daily Sales from QlikView (dimensioned by Country)

Daily Sales from Tableau (dimensioned by Country)

Daily Sales Units (dimensioned by Country)

Monthly Revenue

Performance by Customer

Sales Dashboard (dimensioned by Country)

Sales Dashboard (QS) (dimensioned by Country)

Salesforce Lead Report

All Values

All Values

All Values

All Values

All Values

All Values

All Values

All Values

Edit Burst Content

### 1.2.1. How to duplicate a Sub-Folder for Bursts

Beginning in 6.2.0, the ability to duplicate sub-folders has been added to Bursts



Folder / Daily Activity by Country

Search

1 Docs

Content

Sharing

Bursting

Folder Name

Daily Activity by Country

Folder Owner

Anna Kennedy (Anna)

Description

Burst segmented by Country

1

Daily Activity by Country

Activity KPIs

Churn by Region (dimensioned by Country)

1 Value

Daily Peak Website Visits (dimensioned by Country)

1 Value

Daily Units (dimensioned by Country)

1 Value

Sales Analysis Report (dimensioned by Country)

1 Value

Daily Sales (QlikView) (dimensioned by Country)

All Values

Daily Sales (Tableau) (dimensioned by Country)

All Values

Add Content

Add Sub-Folder

1. Select the duplicate icon to open a confirmation notification and click "ok" to duplicate the sub-folder

docs.metricinsights.com says

Do you want to duplicate this Sub-Folder (and any children)?

OK

Cancel

Daily Activity by Country

Anna Kennedy (Anna)

Burst segmented by Country

Daily Activity by Country

Activity KPIs

Churn by Region (dimensioned by Country)

1 Value

Daily Peak Website Visits (dimensioned by Country)

1 Value

Daily Units (dimensioned by Country)

1 Value

Sales Analysis Report (dimensioned by Country)

1 Value

Activity KPIs (2)

Churn by Region (dimensioned by Country)

1 Value

Daily Peak Website Visits (dimensioned by Country)

1 Value

Daily Units (dimensioned by Country)

1 Value

Sales Analysis Report (dimensioned by Country)

1 Value

Daily Sales (QlikView) (dimensioned by Country)

All Values

Daily Sales (Tableau) (dimensioned by Country)

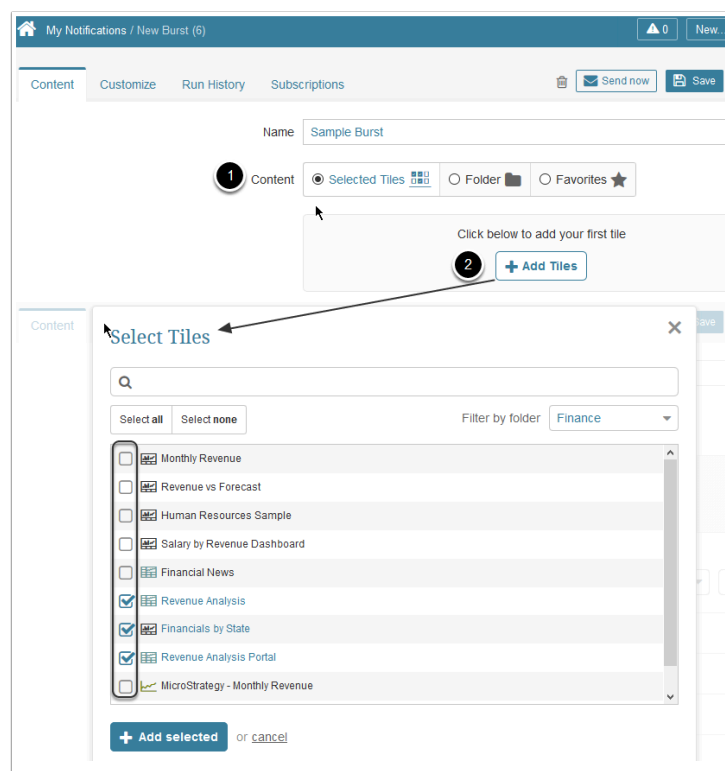
All Values

In this example, the Burst will display **Activity KPIs** as separate sections for each Country, simply by varying the Dimension values in each sub-folder.

Jump Start Guide for Regular Users

Page 109

## 1.3. Content: Selected Tiles



1. We recommend providing a meaningful **Name** to your Burst, since it is going to be used as an email header once notifications are sent.
2. If you choose to add specific tiles into the Burst email, click [ **+ Add tiles** ] and in the opened pop-up choose which of the elements are supposed to be included into the Burst.

**NOTE:** You can filter the list of tiles by entering keywords into the **Search** field or selecting a specific **Folder** (or Category) at the top of the *Select Tiles* pop-up.

Once done with selection, click [ **+ Add selected** ].

## 2. Your selections will be displayed in the list below

My Notifications / New Burst (6)

Content Customize Run History Subscriptions

Name

Content ☒ Selected Tiles ☐ Folder ☐ Favorites

Selected Tiles	
Display Name	
Revenue Analysis	1
Financials by State	
Revenue Analysis Portal	

2

3 Schedule

4 Send Burst via ☒ Email Template: Burst - Any Image Size (default)

☐ FTP

☐ Drive

1. You can delete selections that may have been added erroneously. To do so, click the Trashcan icon in the respective row.
2. Click **[+ Add tiles]** to include more elements
3. **Schedule:** Choose one of the existing Schedule options from the drop-down. Alternatively, you can create your own schedule using the [+] Plus button in the same field. For more instructions on Schedules refer to [Creating a new schedule \(non-Admin user\)](#)
4. Burst are generally sent via Email, but newer versions allow the Burst to be sent also to an SMS address, FTP file, or a Shared Drive. For these new options, see [Delivering a Burst via SMS](#) or

### 3. Define Subscriptions by Groups or individual Users

My Notifications / New Burst (2)

Content Subscriptions Customize

Send now Save Save & Preview

#### Group Subscriptions

Subscribe groups of users to this Burst (for those who have access). Users can unsubscribe after initial subscription.  
When a new user added to a group, they will automatically be subscribed to this Burst.

Click below to add your first recipient

1 + Add Groups

#### Individual Subscriptions

Subscribe or unsubscribe individual users to this Burst.

2 ☒ Send to Burst owner ( ) too

Users All Users Groups All Groups

3

Subscribed users	Disabled Users
<input type="checkbox"/> Display Name	
<input type="checkbox"/> Canada Sales	
<input type="checkbox"/> Cronos	
<input checked="" type="checkbox"/> Ellen Willer	
<input checked="" type="checkbox"/> France France	
<input checked="" type="checkbox"/> Fred Power	

1. **Group Subscriptions:** You may add Groups of users to the distribution list. A group can be created at *Admin > Groups*.
2. **Send to Burst Owner:** Check if you want to send the burst to yourself.
3. **Subscribed users:** To add users one by one, choose them in this list. You can use a **Search** field at the upper right corner above the table to find Users by Name or email.

#### 3.1. Define Subscriptions via a User Map - new in 5.5.1

**i** New in 5.5.1, Burst subscriptions can also be controlled by applying a User Map. For instructions on creating a User Map see [Create a User Map](#).

My Notifications / Weekly Stats Burst

Content Customize Subscriptions Run History

Send now Save Save & Preview Save & Enable

1 ☒ Subscribe everyone who has [Weekly Stats](#) on their homepage.

2

Save pending changes to see subscription.

If your Subscriptions tab defaults to 'Subscribe everyone who has xx on Homepage:

1. Set the 'Subscribe everyone' toggle to **Off** - (wording on this option may be slightly different based on how you selected the content for your Burst)
2. **[Save]** to view all options for assigning subscriptions

My Notifications / Weekly Stats Burst

Content Customize Subscriptions Run History

Subscribe everyone who has [Weekly Stats](#) on their homepage.

Set Subscribers via User Map **1**

### Group Subscriptions

Subscribe groups of users to this Burst (for those who have access). Users can unsubscribe after initial subscription.

When a new user is added to a group, they will automatically be subscribed to this Burst.

Click below to add your first Group

[+ Add Groups](#)

1. Toggle the 'Set via User Map' to **ON**

My Notifications / Weekly Stats Burst

Content Customize Subscriptions Run History

Subscribe everyone who has [Weekly Stats](#) on their homepage.

Set Subscribers via User Map [Sales Operations User Map](#) **1**

☒ Send to Burst owner (anna Kennedy, bk@metricinsights.com) too

### Users Subscribed via User Map **3**

Disabled Users

Name	Added	Unsubscribed
anna Kennedy	2019-04-15 20:21:01	
Elena Davis	2019-04-15 20:21:01	
Lana Stone	2019-04-15 20:21:01	
Yana Byalkivska	2019-04-15 20:21:01	

1. Select **User Map** from those available to you via the drop-down
2. **[Save]**
3. **Users Subscribed** grid will populate with contents from User Map

💡 For details on how the User Map drop-down is populated, see Security chapter on [Datasets](#)

## 4. Customize tab: use advanced Burst settings

The screenshot displays the 'My Notifications / New Burst' interface. The 'Customize' tab is active, showing various settings for a new burst. The 'Email Template' is set to 'Burst - Any Image Size (default)'. The 'Email Subject Line' is '[Name] for [Today]'. The 'Custom Header Text' and 'Custom Footer Text' fields contain placeholder text. The 'Include PPT document' option is set to 'yes'. The 'PPT template' is set to 'Default'. On the right, a preview of the email sample is shown, titled 'Email Sample', with a subject line 'Sample Burst for 09/25/2017'. The preview includes a header with 'METRIC INSIGHTS' and a table titled 'Sales Difference'.

Day of Calendar Date	Channel	Country	Product Category	sum(Total Gross Profit)	sum(Total Sales Amount)	Prior sum(Total Sales Amount)	Change Type
2018-02-20 00:00:00	store visit	France	Furniture	15,040	74,426		New
2018-02-20 00:00:00	e-mail marketing	United States	Wine	113,544	312,704		New
2018-02-20 00:00:00	e-mail marketing	Australia	Furniture	1,687	6,252		New
2018-02-20 00:00:00	e-mail marketing	Spain	Accessory	22,258	87,856		New
2018-02-20 00:00:00	corporate sales	Canada	Accessory	10,409	65,311		New

- Email Template:** a default Burst's email template is "Burst - Any Image Size"; it was designed as a standard and flexible solution. You are free to add your custom template to a Burst by:
  - First, adding it to *Admin > Email Templates*;
  - Secondly, choosing it from this drop-down list.

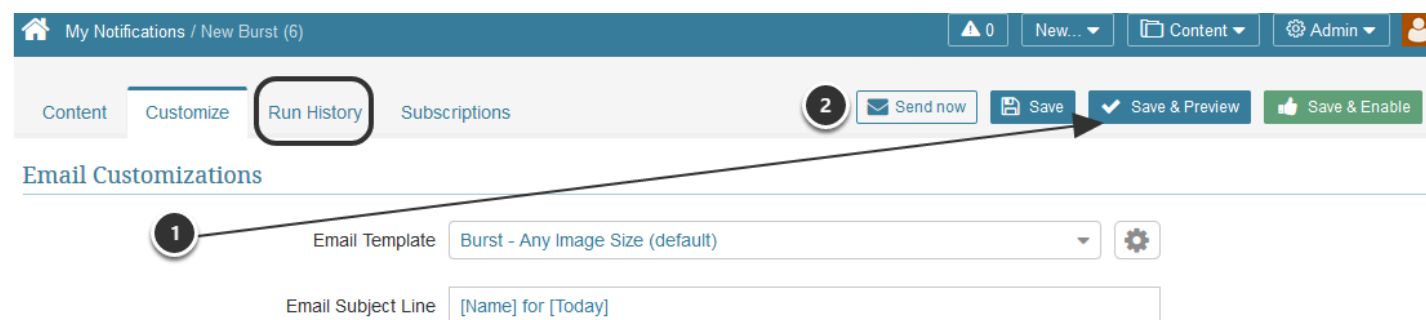
- Email Subject Line:** In previous versions, Burst's name also serves as an email Subject. In versions after 5.1.1 you got more freedom to construct the email in the following format:

Name OR Username + Today OR Yesterday

- Custom header / Custom Footer:** You can choose to include arbitrary text into custom fields and have that shown up as a header, footer, or both in the Burst email as shown in the picture above.
- Include PPT document:** choose whether an attachment with a PowerPoint Presentation should be added to an email.
- Optional, create a new PPT template:

<https://yourcompany.metricinsights.com/editor/ppt>

## 5. Enable your Burst

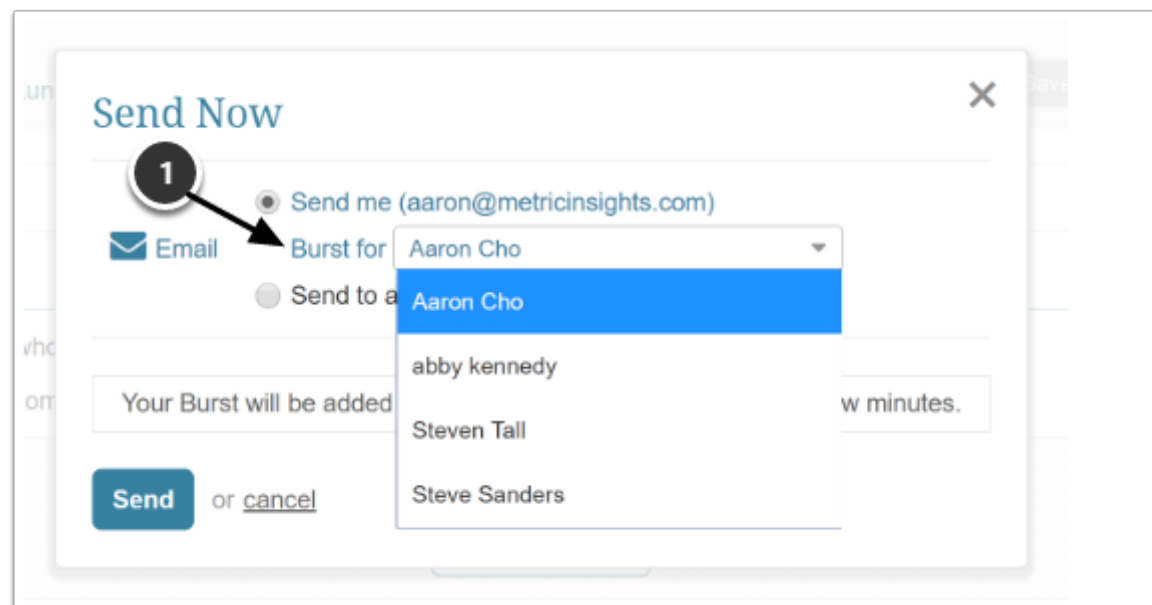


1. At the upper right corner of the screen click **Save & Enable**.
2. Optionally, you can request to [Send now] - see Step 5.1

Once enabled, the Report Burst will run on the schedule you set up.

**i** Note that in 5.2.1 and later a *Run History* section is available for Bursts.

### 5.1. Optional - test Burst for yourself or other Users



1. [5.6.1] This new options allows you to setup Bursts for others and then verify exactly what these Users will receive. Open the **Burst for dropdown** and select a Subscriber other than yourself. You will receive the Burst immediately, tailored for the selected Viewer - the system will apply any Usermaps, Security privileges and permissions, as well as any Bookmarks set for that User. Note that the default is to send Burst based on your personal settings.

## 5.3 Setup bursting from the Favorites Editor

Users may setup report bursts directly from their Favorites Editor

### 1. Access My Preferences (below your Username) > My Favorites

My Favorites







New... Content Admin Alex

My notifications are ON for emails, SMS and Phone Alerts • Thursday - January 12, 2017 System 14:10 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

Maintain content, schedule and sharing of your Favorite folders

#### Favorite Folders

Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5		
My Favorites Share	8	✓	
Tableau Alerting	1	✓	 Show Bursts in this folder
Total Monthly Sales	4	✓	
Mobile (Metrics)	3	✓	
Mobile (Reports)	7	✓	

In the respective row click **Show Bursts in this folder** icon.



## 2. Pop-up will display any existing bursts that include this folder

Bursts That Include This Favorite

Bursts that include **My Favorites Share**

My Bursts

Name ^	Recipients	Last Sent	
Sharing	1 user		

+ New Burst

This will create a new Burst that includes My Favorites Share

1. You can review any existing bursts by selecting a burst name in the table
2. Or create a new one. Selecting **[+ New Burst]** will redirect you to the *Burst Editor*

## 3. To create a new burst, you will begin in the Notifications:Bursting section

My Bursts / New Burst

New...ContentAdminAlex

ContentScheduleSubscriptions

Name

New Burst

Send...

favorite folders

selected tiles

Send folders as

a single large email

individual emails

Favorite Folders

Drag & Drop Rows to Re-Order

Display Name	
My Favorites Share	

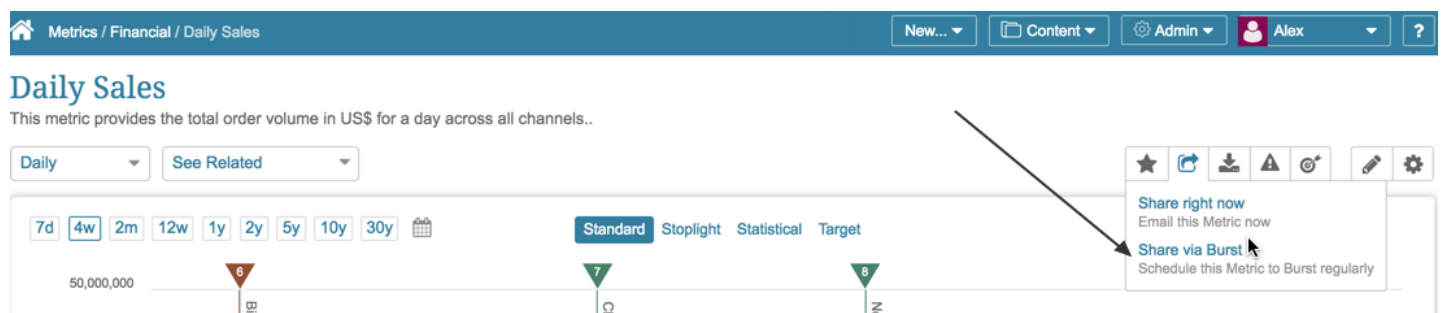
+ New Folders

For complete steps, see: [Setting up a new Report Burst](#)

## 5.4 Bursting from the Report or Metric Viewers

In addition to creating Report Bursts from the Notifications screen ([Setting up a new Report Burst](#)), you can initiate bursts directly from the element Viewers as shown below.

### 1. Select 'Share via Burst' from the share icon on Viewer



### 2. To add to this element to an existing burst

1. Click on one of your already created bursts
2. Click **Select burst**

The selected Burst is going to be updated and will include this new element

### 3. To set up a new burst

New or Existing Burst?  
Create new, or add to an existing Burst

1

create new Burst ...

Burst

Management Reports

2

New Burst

Selecting **New burst** will redirect you to the *Burst Editor*

#### 3.1. Proceed with creating a new Burst

My Bursts / New Burst

New...ContentAdminAlex

ContentScheduleSubscriptions

Send nowSavedPreviewEnable

NameNew Burst

Send... favorite folders

selected tiles

Selected Tiles

Display Name

Daily Sales

+ Add tiles

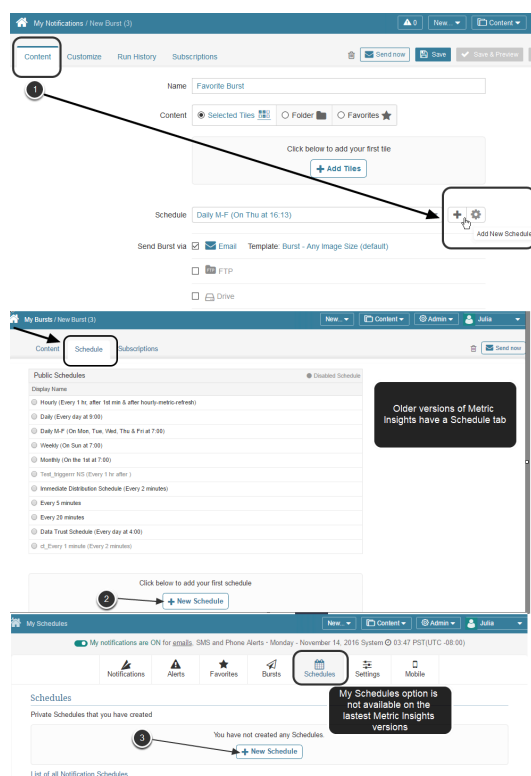
For complete steps, see [Setting up a new Report Burst](#)

## 5.5 Creating a new schedule via Burst Editor

This function allows Users to create their own private schedules to control the timing of any of their digests and Bursts.

Admin users also have access to more complex options when setting up Schedules; see: [Create or Modify a Notification Schedule via Notification Schedule Editor](#)

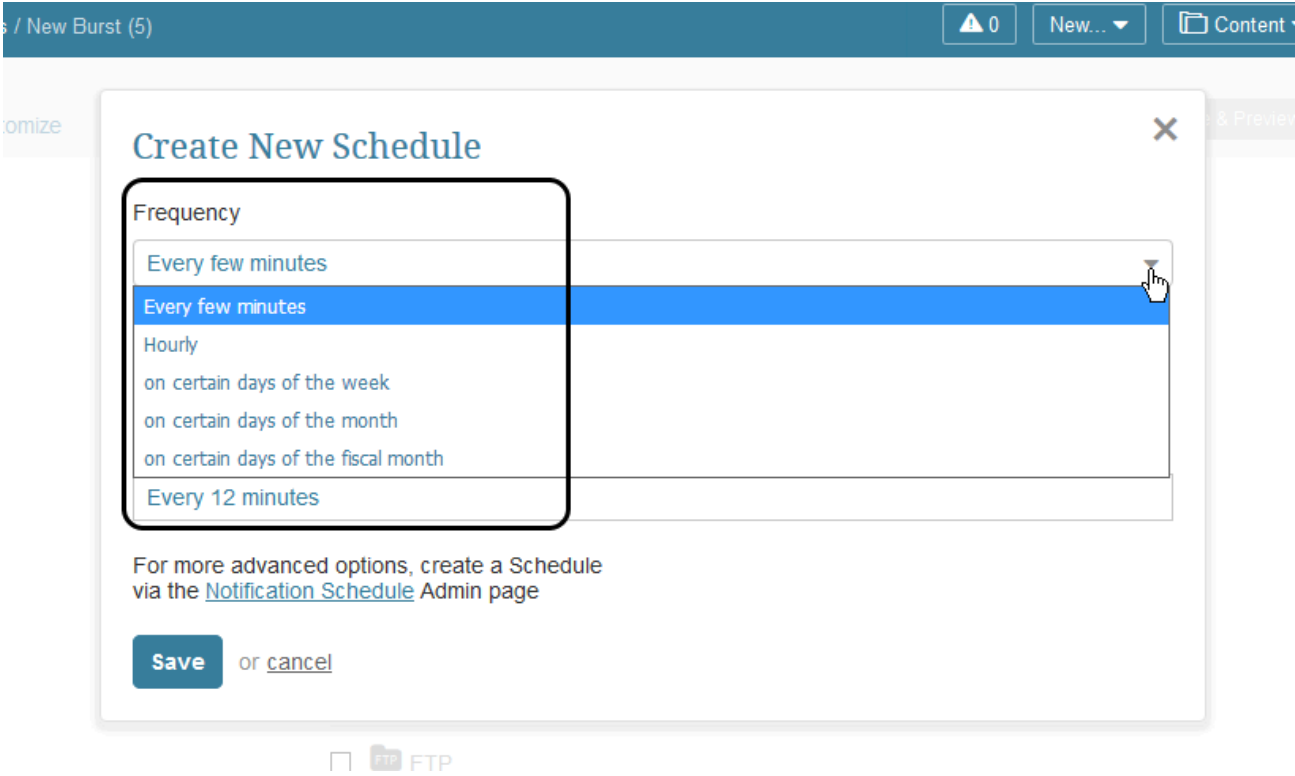
### 1. Users can create their own schedules from as part of creating new Bursts (Access New menu > Burst)



You can create a New Schedule from several places depending on how current your MI instance is:

1. [5.2] When creating a new Burst using the **Content** tab
2. [5.0] When creating a new Burst using the **Schedule** tab
3. [4.x] *My Preferences > My Schedules*

## 2. 'Create new schedule' pop-up appears



Select a Frequency from the drop-down and further options available will depend on the Frequency chosen.

## 2.1. Daily or 'Certain days of the week' schedule options

**Create New Schedule**

On certain days of the week option

Frequency

1 on certain days of the week

2

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mon	Tue	Wed	Thu	Fri	Sat	Sun

Select All

3 All times are in UTC, 0:00 timezone.

8 : 00

+ Add another time

Schedule name

4 On at 8:00

5 For more advanced options, create a Schedule via the [Notification Schedule](#) Admin page

Save or [cancel](#)

1. Select to schedule by **day of week**
2. Select **days of the week** by activating the corresponding check boxes
3. You may schedule one or many **times per day**
4. **Schedule name** will be automatically generated or you may override with name of your choosing
5. Admin Users can access more scheduling options via this link (see Step 2.4)

## 2.2. Hourly or 'Every few minutes' schedule options

The screenshot shows the 'Create New Schedule' dialog box. At the top, there's a header bar with 'New Burst (5)', a warning icon with '0', a 'New...' dropdown, and a 'Content' button. The dialog itself has a title 'Create New Schedule' and a close button. A dark banner at the top of the dialog says 'Hourly or 'Every few minutes' option'. The form includes:

- Frequency:** A dropdown menu set to 'Hourly'.
- Send every:** A text input with '12' and a unit dropdown set to 'hour(s)'.
- Send:** Two radio buttons: 'as early as possible' (unselected) and 'after specified time' (selected).
- Send After:** A text input with '10' and a unit dropdown set to 'minute(s)'.
- Schedule name:** A text input containing 'Every 12 hrs, after 10th min'.
- Footer:** A note stating 'For more advanced options, create a Schedule via the [Notification Schedule](#) Admin page'.

On the left side of the dialog, there are five numbered steps (1-5) corresponding to the instructions below.

1. Select how many hours apart the Burst will occur
2. Activate the check box for either **[as early as possible]** or **[after specified time]**
3. Optionally, specify the number of minutes after specified hour the Burst will occur
4. **Schedule name** will be automatically generated or you may override with name of your choosing
5. Admin Users can access more scheduling options via this link (see Step 2.4)

## 2.3. 'Certain days of the Month' schedule options

The screenshot shows the 'Create New Schedule' dialog box. At the top, there's a dark banner that says 'On certain days of the month (fiscal or calendar)'. Below this, the 'Frequency' dropdown is set to 'on certain days of the fiscal month'. To the left of the date and time fields are numbered callouts: 1 points to the 'At date:' section, 2 points to the 'At time:' section, 3 points to the 'Schedule name' field, and 4 points to a note about advanced options. The 'At date:' section has three dropdowns for '1st', '10th', and '30th', each with an 'x' icon to remove it, and a '+ Add another day' link. The 'At time:' section has a dropdown for '10' and a dropdown for '00', with 'UTC, 0:00' to the right. The 'Schedule name' field contains the text 'On the 1st, 10th & 30th of the Fiscal Month at 10:00'. At the bottom, there's a 'Save' button and a link to 'cancel'.

1. Select one or multiple days of the Month
2. Select a specific time
3. **Schedule name** will be automatically generated or you may override with name of your choosing
4. Admin users can access more scheduling options via this link (see Step 2.4)

## 2.4. [Admins only] Notification Schedule Editor - advanced options

In newer versions of MI, Power Users can be granted Privilege(s) to access the Schedule Editor - see [Notification Schedule](#) in [Controlling Access within Metric Insights](#).



**Create new schedule**

Name: 741 (On Tue at 6:47)  
CT\_2354 (Every 1 minute)  
ct\_Every 1 minute (Every...  
Daily (Every day at 9:00)  
Daily M-F (On Mon, Tue...  
Data Trust Schedule (Ev...  
DT110-notification-sched...  
DT115-notification-sched...  
DT116-notification-sched...  
DT128-notification-sched...  
DT129-notification-sched...  
DT130-notification-sched...  
DT131-notification-sched...  
DT135-notification-sched...  
DT138-notification-sched...  
DT139-notification-sched...  
DT141-notification-sched...  
DT143-notification-sched...  
DT145-notification-sched...  
DT146-notification-sched...

Public? User Emails Last Sent on

Frequency: Hourly

Send every: 1 hour(s)

Send: ☐ as early as possible | ☒ after specified time

Send After: 15 minute(s)

Wait for data to be collected? ☒ yes | ☐ no

Wait for: hourly-metric-refresh

Must be satisfied during current cycle? ☒ yes | ☐ no

Data dependency: TestData

This Schedule is: ☒ public | ☐ private (only visible to me)

Schedule name: Every 1 hr, after 15th min & after hourly-metric-refresh

**Save** or [cancel](#)

Displaying records 1 - 20 of 65

Your Administrator can create a more complex schedule for you if required. Full details on these advanced options can be viewed here: [Create or Modify a Notification Schedule via Notification Schedule Editor](#)

## 6. Working with Favorites and Digests

## 6.1 Favorites - Overview

Favorites are sections that you add to your *Homepage*. By holding the tiles that are of interest to you in favorite sections, you can easily access frequently used information and also receive email digests that provide a daily summary of all updates to your favorite tiles.

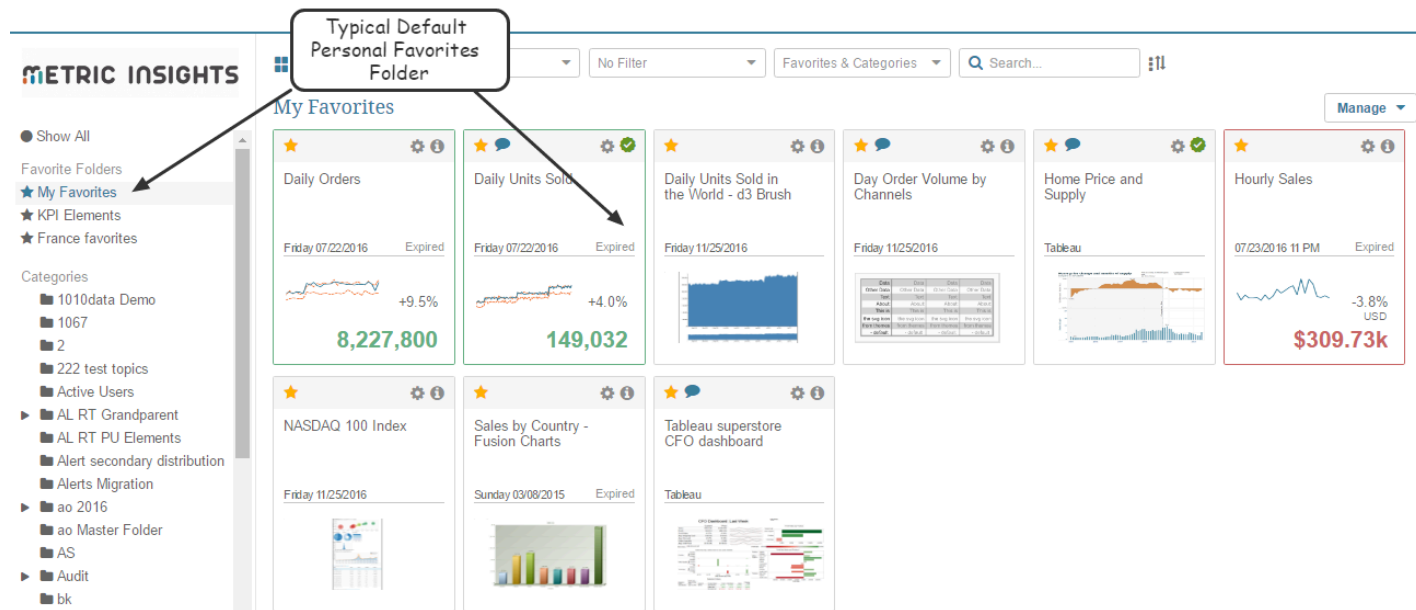
There are two types of Favorites Folders in Metric Insights:

**Personal Favorites:** When you first access the system, you will typically have your own empty personal favorites folder (usually called "My Favorites") that you can populate with tiles. You are able to create any number of new Favorites folder as long as each is given a unique name.

**Shared Favorites:** Elements can be shared by populating a favorites list and then sharing it with individual users and/or groups of users. For example, you may establish a set of KPIs that you share with everyone. If you have a "unknown" folder on your *Homepage*, hovering over the title will reveal the name of the folder's owner. All updates to Tiles that the owner makes to this folder will be replicated in your *Homepage* folder.

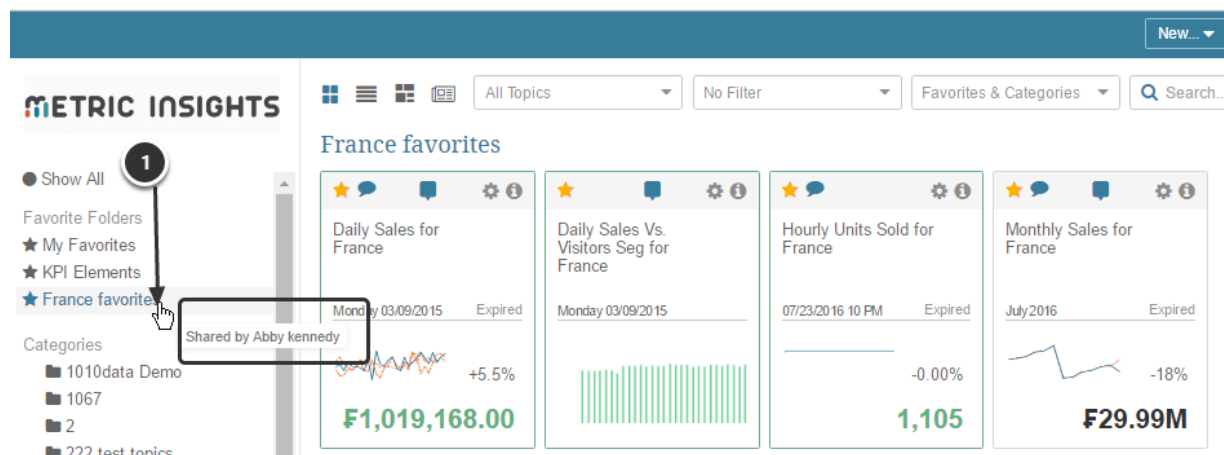
**NOTE:** If you add hidden (non-visible) elements to your Favorites Folders, you will only see these in **Favorites** folder sections and not in their corresponding **category** on *Homepage*. This can occur when reports or metrics are provided in Drill-downs but not set to display on *Homepage*.

## Personal Favorites



A default personal favorites folder is created for you by the system and is usually entitled "My Favorites"

## Shared Favorites



1. Hover over the Shared Favorites title to determine the owner of the folder

## Other reasons to set up Favorites folders

One of the best reasons to set up Favorites folder is so that you can generate email digests or Bursts containing only those tiles you are interested in. These Notifications can be sent daily for all of your favorites tiles when they change or you can set a different time interval to receive the

digests. See [What are Favorite Digests](#) or [Setup bursting from the Favorites Editor](#) or [Create New Burst](#)

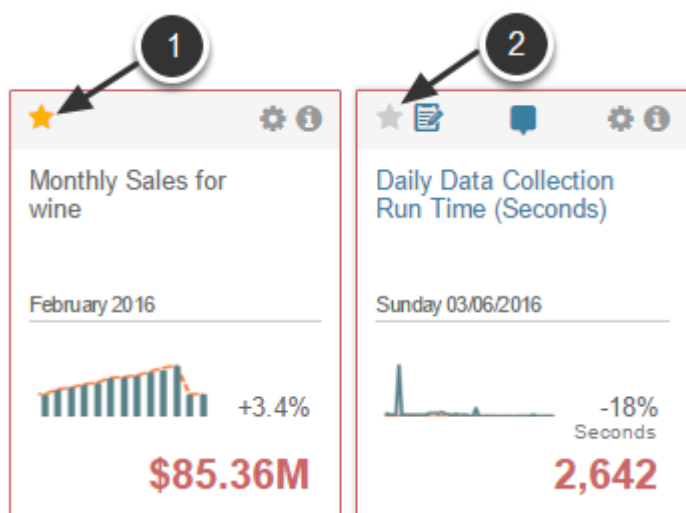
## 6.2 Add (or Delete) Elements to a Favorites folder

Any tile on your *Homepage*, or any element that you can view, may be included in one or more of your Favorite folders. This is controlled by the **Star** icon on either the *Homepage* view, Chart Preview or any of the Chart Viewers.

The *Add to Favorites* pop-up includes both your Personal Favorite folders and those shared folders to which you have been granted the **ability to maintain** (this configuration is set by the User sharing the Favorite folder)

Tiles can also be added to Favorites via your *Favorites* Editor, see [Using Notifications: Favorites Editor to Maintain Favorites](#)

### 1. Click the small Star icon at the top left corner of a tile



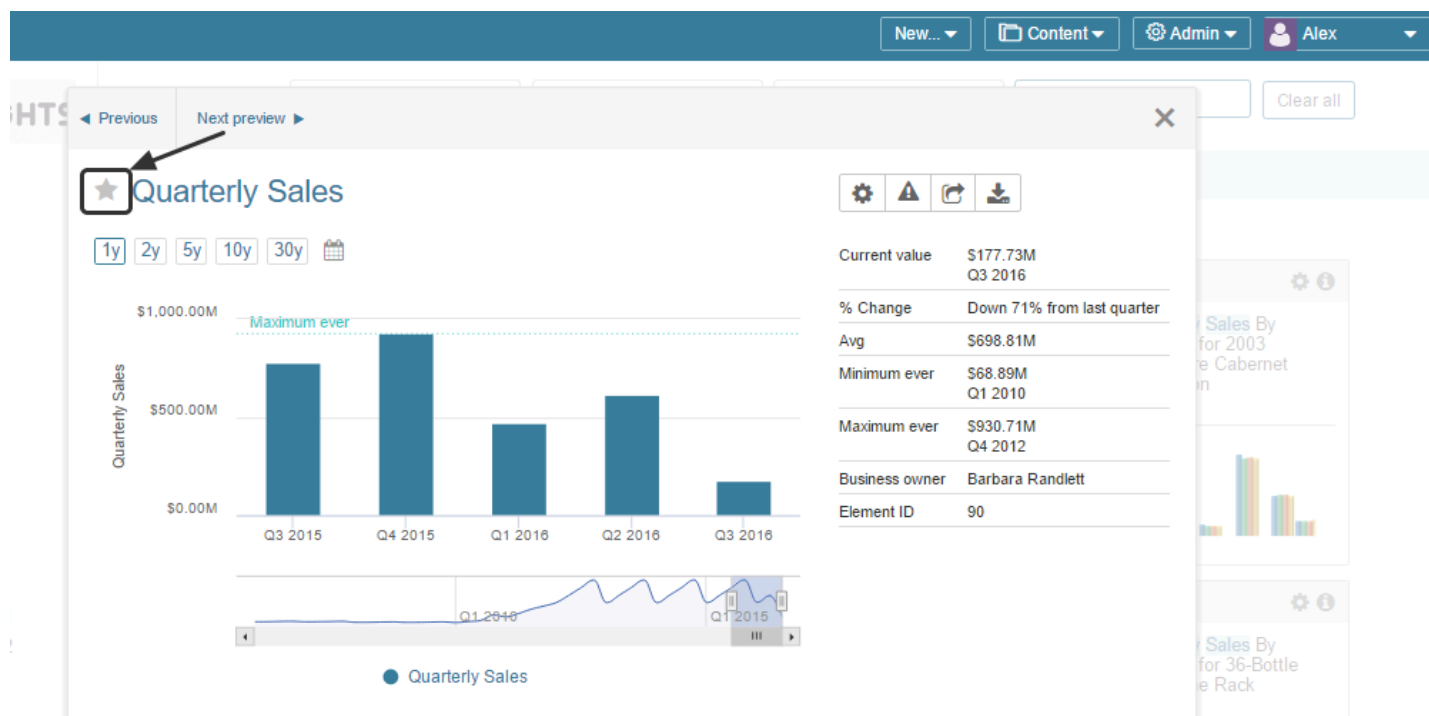
1. Example of an element already added to at least one Favorite folder (gold star)
2. Example of an element not yet included in any Favorite folder (grey star)

## 1.1. The Star icon on Viewers



This Chart has not yet been included in any Favorites folder

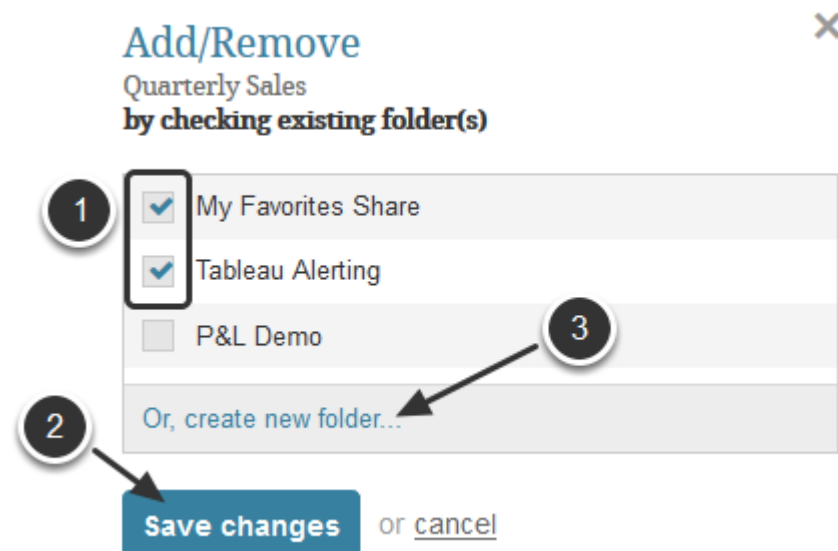
## 1.2. Or on the Preview of any Chart



Click the **Star** icon to add the Chart to the Favorite folder(s)

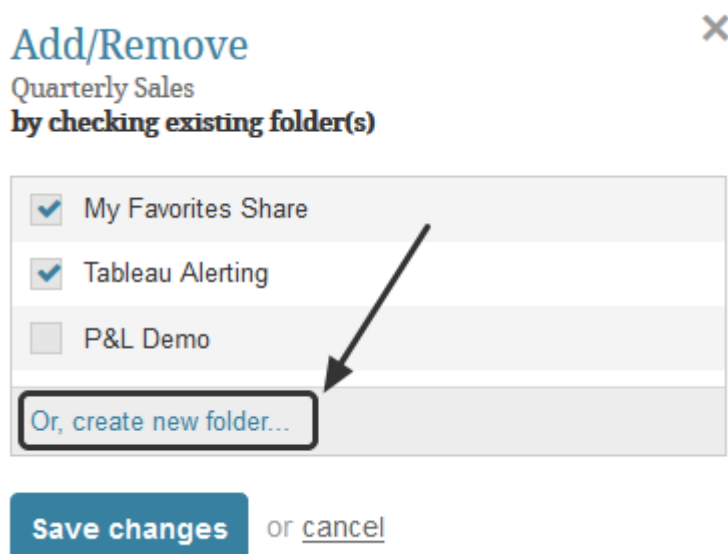
The *Add/Remove* pop-up opens

## 2. Add an element to Favorite folder(s)



1. Select or clear check boxes to add or remove the Chart from the corresponding Favorite folder(s). Multiple folders can be selected at once
2. Click **Save changes**
3. Alternatively, you can choose to create a new Favorite folder (see below) based on your assigned **Permissions**

### 2.1. Click 'create new folder'





## 2.2. Enter the name for a new Favorite folder

Add/Remove

Quarterly Sales

by checking existing folder(s)

☒ My Favorites Share
 ☒ Tableau Alerting
 ☐ P&L Demo

Quarterly Sales folder

Name your new folder, then click **Save changes** below

Save changes

or [cancel](#)

Click **Save changes**

A new folder is created and the selected Chart is automatically added to it and to any other Favorite folders selected from the list

## 3. Check whether your Chart has been added to the required Favorite folder(s)

METRIC INSIGHTS

Show All

Favorite Folders

★ My Favorites

★ KPI Elements

★ France favorites

Categories

1010data Demo

1067

2

222 test topics

Active Users

Hourly Sales

07/23/2016 11 PM

Expired

-3.8%  
USD

\$309.73k

Quarterly Sales

Q3 2016

-71%

\$177.73M

Sales by Country - Fusion Charts

Sunday 03/08/2015

Expired

Once the element is added to the Favorite folder(s), its **Star** icon turns golden on all element displaying options

## 6.3 Using Favorites Editor to Maintain Favorites

*Favorites Editor* provides a central place to control all the features available for Favorites and control how these Favorites are displayed in your Digests. This article will provide an overview of those functions and links to further details as required.

### 1. Access My preferences > My favorites

1 My notifications are ON for emails, SMS and Phone Alerts · Tuesday - October 25, 2016 System 07:54 PDT(UTC -07:00)

Maintain content, schedule and sharing of your Favorite folders

#### Favorite Folders

Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5		⚙️ 📄 📧 🗑️
My Favorites	8	✓	⚙️ 📄 📧 🗑️
Tableau Alerting	2		⚙️ 📄 📧 🗑️
P&L Demo	3		⚙️ 📄 📧 🗑️
Mobile	3		⚙️ 📄 📧 🗑️
Sales	10	✓	⚙️ 📄 📧 🗑️

2 + New Favorite Folder

✓ Preview Favorites Digest Send now This will send an email to

1. From *My Favorites* screen you can manage your folders, preview them, or send a test email notifying you on any updates on the items included to these folders.

For details, see [Requesting a 'Daily' Favorites Digest](#)

2. To add a new Favorites Folder, click **[+ New Favorite Folder]**

## 1.1. Adding a New Favorite Folder

### Add Favorite

×

1

Display name

My Daily Elements

2

Include updated elements in Favorites Digest?

☒ yes | ☐ no

Include in Digest on

☒ element update | ☐ Data Collection Trigger completion

3

Save

 or [cancel](#)


1. Enter a **Display name** (title) for your new folder. This name must be unique to your Homepage.
2. Indicate if you would like this folder to be included in the **Favorites Digest** which you can have emailed to you. If you select 'yes', an additional choice appears below.
3. *Optional.* You can select to have the Digest generated when one of two situations occurs:
  - **Element update:** Digest will be generated on a Daily Basis if at least one element has been changed.
  - **Date Collection Trigger Completion:** Digest will be generated based on completion of certain events.

In either case, only those elements which have been 'updated' since your last digest was produced will be included in your digest(s).

## 2. Adding or Deleting Elements from an existing Favorites Folder

### Favorite Folders

Favorite Folders				⚙️ Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions	
Most Popular	4		⚙️ ↗️ ⬇️	
My Favorites	6	✓	⚙️ ↗️ ⬇️ 🔄 🗑️	
Tableau Alerting	1		⚙️ ↗️ ⬇️ 🗑️	
P&L Demo	3		⚙️ ↗️ ⬇️ 🗑️	
Mobile	2		⚙️ ↗️ ⬇️ 🗑️	
Sales	7	✓	⚙️ ↗️ ⬇️ 🔄 🗑️	

 View elements

[+ New Favorite Folder](#)

[✓ Preview Favorites Digest](#)[✉ Send now](#)

This will send an email to  
yulia.nesova@metricinsights.com

Click on the name of a folder that you have ability to **Maintain**. This could be either a Personal Favorite or a Shared Favorite where you have been granted 'Ability to Maintain Contents'.

If you select this option for a folder that you cannot maintain, only a listing of existing elements will display without the add or delete options

### 2.1. View List of Elements and optionally add or delete elements

#### Manage Tiles: My Favorites



Tiles in Grid		📄
<input type="checkbox"/>	Name ▲	
<input type="checkbox"/>	Daily Sales by Channel & Product Category	
<input type="checkbox"/>	Monthly Completely Satisfied Survey Responses	
<input type="checkbox"/>	Monthly Support Experiences	

⏪ ⏴ | Page 1 of 1 | ⏵ ⏩ | 🔄

Displaying records 1 - 3 of 3

[+ Add Tiles](#)[🗑 Delete selected tiles](#) or [Delete all tiles](#)

1. Checking any element(s) will un-hide the **Delete selected items** button to allow multiple deletions
2. Use **Add Tiles** to display Add Pop-up

## 2.2. Use the 'Add Element' pop-up to add additional Element

**Add Element** ✕

Q Filter results 1

Select all Select none Category All Categories Topic All Topics

- ☐ Country Sales Distribution-Parameters (Not Visible on HomePage)
- ☐ King County Monthly Home Sales from Tableau
- ☐ Snohomish County Monthly Home Sales from Tableau
- ☒ Pierce County Monthly Home Sales from Tableau
- ☐ Kitsap County Monthly Home Sales from Tableau
- ☐ Thurston County Monthly Home Sales from Tableau
- ☐ Island/Island County Monthly Home Sales from Tableau
- ☐ Skagit County Monthly Home Sales from Tableau

Add selected item(s) 2

1. You can limit pick-list for Elements by **Category** or **Topic** or by using the **Filter** or a combination of these
2. You can **Add** items by using the check boxes and **Add selected item(s)** button

## 3. To Share a folder
























### Favorite Folders

Favorite Folders			⚙ Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions
My Favorites Share	9		⚙ ↗ ⬇ 🗑
Tableau Alerting	1	✓	⚙ ↗ ⬇ 🗑
P&L Demo	12	✓	⚙ ↗ ⬇ 🗑
Total Monthly Sales	4	✓	⚙ ↗ ⬇ 🗑
Test Grid View	1	✓	⚙ ↗ ⬇ 🗑

Click the '**Share**' icon and following instructions [here](#)

## 4. To copy all elements from one folder to another (Duplicate)

### Favorite Folders

Favorite Folders				⚙️ Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions	
My Favorites Share	9		    	
Tableau Alerting	1	✓	    	
P&L Demo	12	✓	    	
Total Monthly Sales	4	✓	    	
Test Grid View	1	✓	    	

Select the 'Duplicate' icon to display the Pop-up

### 4.1. Complete the 'Duplicate Favorite' pop-up

Duplicate Favorite

1

New Folder name

Elements for 'Island' data

2

Duplicate permissions

☒ yes | ☐ no

Select Dimension Values alterations

Change County from "Pierce" to:

Change County from "Pierce" to:

--

Island

Island|Island

...

Duplicate

























or cancel

1. Assign a unique folder name
2. Choose if you want to duplicate the list of Users and Groups that currently Share the folder or re-assign manually

For more information on this function, please see [Duplicate an entire Shared folder automatically](#)

# 5. To Edit the various display fields for Favorites, select the Edit icon

## Favorite Folders

Favorite Folders				⚙ Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions	
My Favorites Share	9		   	
Tableau Alerting	1	✓	    	
P&L Demo	12	✓	    	
Total Monthly Sales	4	✓	    	
Test Grid View	1	✓	    	

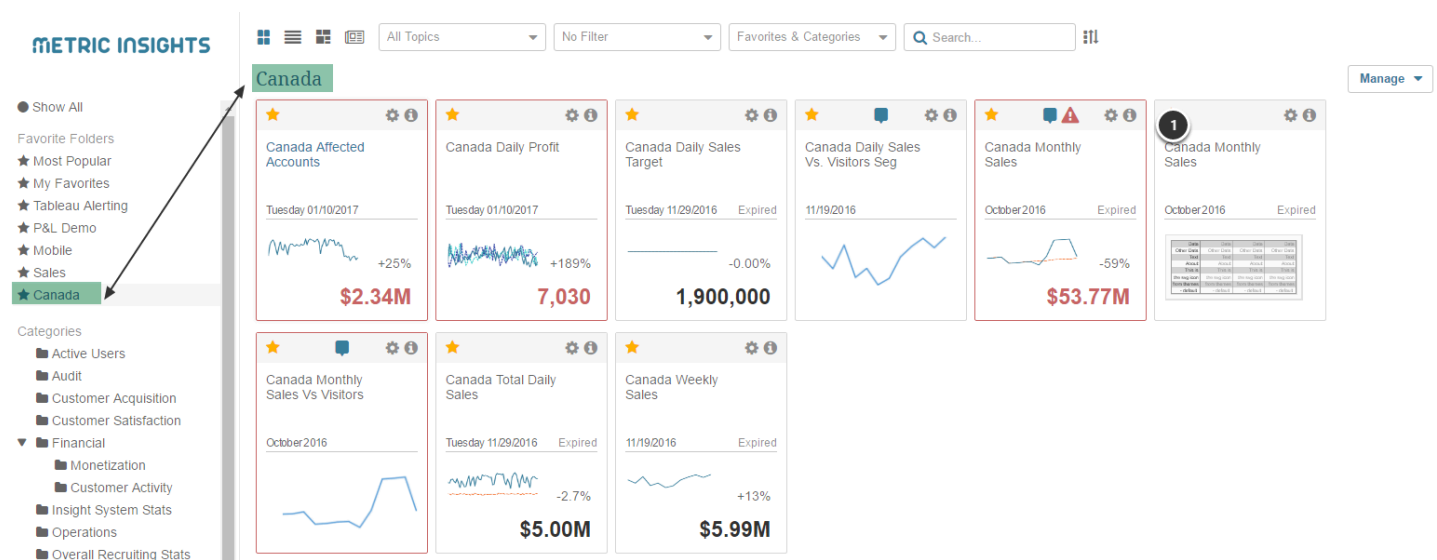
See instructions here [Using Favorites Editor to Maintain Favorites](#)



## 6.4 Duplicate an entire Favorite Folder automatically

This feature allows you to copy the entire contents of one folder to create another. This is helpful when you have users that typically view a single segment. Optionally, the **Permissions** of your existing *Favorites* folders can be copied in order to put the segments into separate folders for the same user or groups.

### 1. Example of Favorite folder for 'Canada Sales'



Note that folder 'Canada' contains various elements tracking Sales and Revenue in Canada

## 2. Access My Preferences (below your Username) > My Favorites

My Favorites








New...ContentAdminJulia

My notifications are ON for emails, SMS and Phone Alerts - Wednesday - January 11, 2017 System 13:39 UTC(UTC +00:00)

NotificationsAlertsFavoritesBurstsSchedulesSettingsMobile

Maintain content, schedule and sharing of your Favorite folders

Favorite Folders

Favorite Folders			Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5		
My Favorites	8	✓	
Tableau Alerting	2		
P&L Demo	0		
Mobile	3		
Sales	10	✓	
Canada	9	✓	

+ New Favorite Folder

In the respective row click the **Duplicate** icon.

### 3. Complete the 'Duplicate Favorite' pop-up

Duplicate Favorite

1

New Folder name

Germany

2

Duplicate permissions

☒ yes | ☐ no

3

Select Dimension Values alterations

Change Sales Country from "Canada" to

Germany

Change Country from "Canada" to

Germany

Duplicate

 or [cancel](#)

1. Select a **New folder Name** since two folders cannot have the same name
2. Determine if you want to retain the same 'permissions' for the new folder:i.e.; the same set of Shared Users or Groups
3. Select the new Dimension value from drop-downs

Click **Duplicate** to complete the process

### 4. Example of New Favorites Folder in Favorites Editor

Favorite Folders

Favorite Folders				⚙ Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions	
Most Popular	5		⚙ ↗ ⬇	
My Favorites	8	✓	⚙ ↗ ⬇ ⬅ ➡ 🗑	
Tableau Alerting	2		⚙ ↗ ⬇ 🗑	
P&L Demo	0		⚙ ↗ ⬅ ➡ 🗑	
Mobile	3		⚙ ↗ ⬇ 🗑	
Sales	10	✓	⚙ ↗ ⬇ ⬅ ➡ 🗑	
Canada	9	✓	⚙ ↗ ⬇ ⬅ ➡ 🗑	
Germany	9	✓	⚙ ↗ ⬇ ⬅ ➡ 🗑	

1. The newly created folder appears in the *Favorites* grid
2. Use the displayed icons to **Share**, **Duplicate**, **Edit** or **Delete** the new folder just as you would for any other *Favorite*

## Result

**METRIC INSIGHTS**

Germany

● Show All

Favorite Folders

- ★ Most Popular
- ★ My Favorites
- ★ Tableau Alerting
- ★ P&L Demo
- ★ Mobile
- ★ Sales
- ★ Canada
- ★ **Germany**

Categories

- Active Users
- Audit
- Customer Acquisition
- Customer Satisfaction
- ▼ Financial
  - Monetization
  - Customer Activity
- Insight System Stats
- Operations
- Overall Recruiting Stats

All Topics No Filter Favorites & Categories Search...

Germany Affected Accounts  
Tuesday 01/10/2017  
Loading... +22%  
**\$1.40M**

Germany Daily Profit  
Tuesday 01/10/2017  
Loading... -36%  
**2,619**

Germany Daily Sales Target  
Tuesday 11/29/2016 Expired  
Loading... -0.00%  
**1,900,000**

Germany Daily Sales Vs. Visitors Seg  
11/19/2016  
Loading...

Germany Monthly Sales  
July 2016 Expired  
Tableau Alerting  
Loading... -60%  
**\$28.62M**

Germany Monthly Sales  
October 2016 Expired  
Loading... -60%  
**\$28.62M**

Germany Monthly Sales Vs Visitors  
October 2016  
Loading...

Germany Total Daily Sales  
Tuesday 11/29/2016 Expired  
Loading... -19%  
**\$2.67M**

Germany Weekly Sales  
11/19/2016 Expired  
Loading... +7.2%  
**\$3.04M**

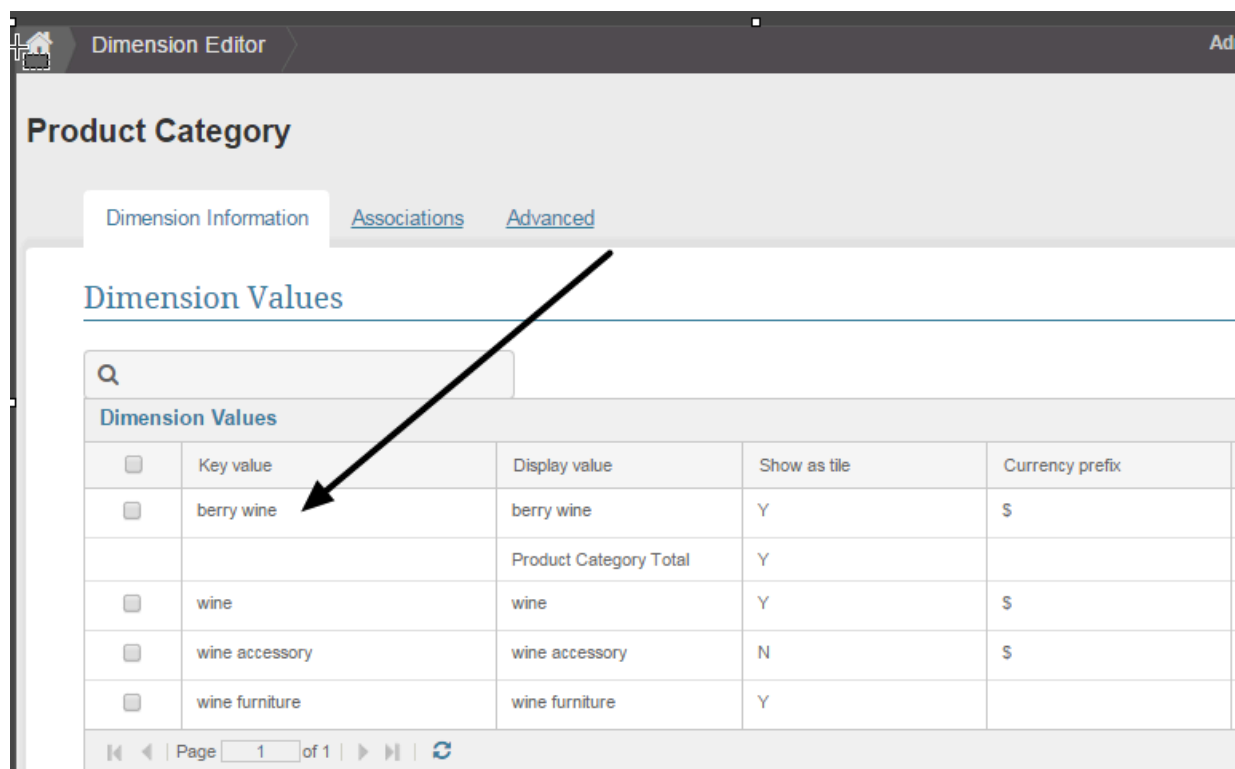
## 6.5 Adding elements without data to Favorite folders

Sometimes you will be creating or importing elements that currently do not have data collected for them, but you may want to set up Favorite folders to display them when data is collected.

You cannot use the Favorites star to select these as we do not display 'empty' elements in the Home Page, and dimensions without any values will not display in the Viewers.

There is a simple way to do this by using the **Favorites Editor**.

### 1. For example, we can add 'berry wine' as a Product before any is sold



The screenshot shows the 'Dimension Editor' interface for the 'Product Category' dimension. The 'Associations' tab is selected, showing a table of 'Dimension Values'. A black arrow points to the 'berry wine' entry in the 'Key value' column.

<input type="checkbox"/>	Key value	Display value	Show as tile	Currency prefix
<input type="checkbox"/>	berry wine	berry wine	Y	\$
		Product Category Total	Y	
<input type="checkbox"/>	wine	wine	Y	\$
<input type="checkbox"/>	wine accessory	wine accessory	N	\$
<input type="checkbox"/>	wine furniture	wine furniture	Y	

Page 1 of 1

## 2. Open 'Manage Favorites' pop-up

**1** Click on any Favorites folder name

**2** Select 'Add more items'


1. Click on any Favorites folder name
2. Select 'Add more items'

## 3. Filter elements by your report name

**1** Search for 'Daily Sales by Channel'

**2** Select 'Daily Sales by Channel for berry wine (Not Visible on Home Page)'

Select items to add

 You can now select '**berry wine**' and the report will appear in your Favorites folder when data is collected.

## 6.6 How to view a hidden tile in your Favorites

When you create a Dimension Value and its **Show as Tile** setting is set to 'No', initially, no tile will be shown on the *Homepage* for that Element dimensioned by the associated Dimension. You must access the hidden Dimension Value's Chart from another Dimension Value's Viewer and designate it as a Favorite on its Viewer.

At least one Dimension Value's tile should be visible in order to provide easy access to "Hidden" ones.

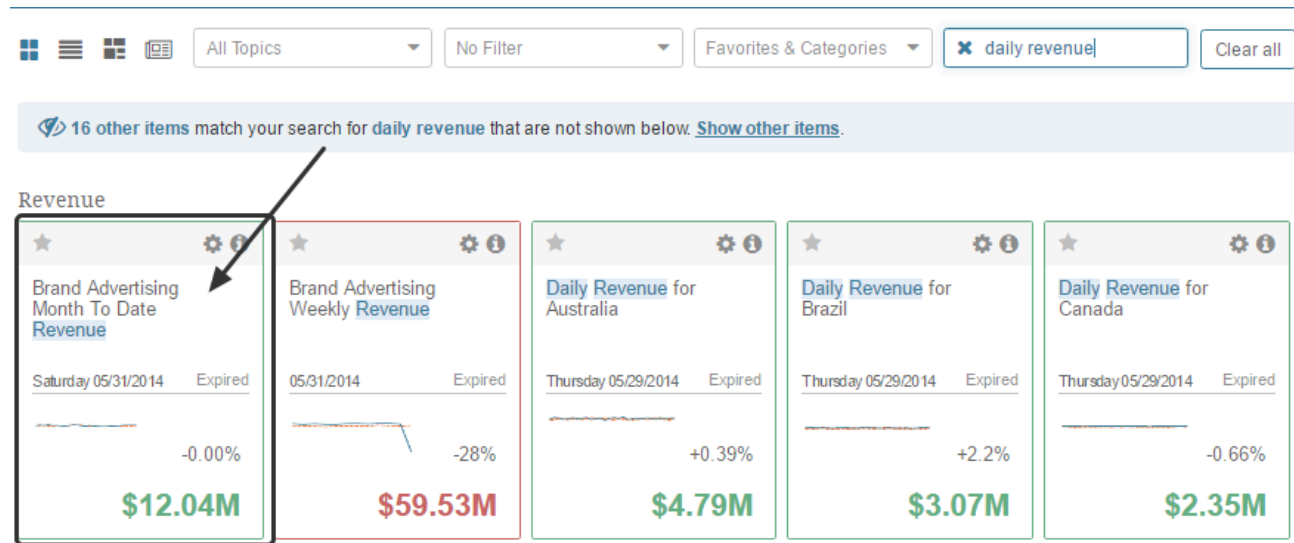
### Hidden Tiles (set in Dimensions by Admin or Power User)

Home Dimensions / Revenue Type <span>New... ▼</span>			
Info Associations Advanced			
Dimension Values			
Dimension Values			
<input type="checkbox"/>	Key Value	Display Value	Show as Tile
<input type="checkbox"/>	1	Brand Advertising	Y
<input type="checkbox"/>	2	Microsoft Advertising	Y
<input type="checkbox"/>	3	Performance Advertising	Y
<input type="checkbox"/>	4	Virtual Goods	N

Note that 'Virtual Goods' Dimension Value's **Show as Tile** setting is set to 'N' while others are configured to be visible on the *Homepage*.

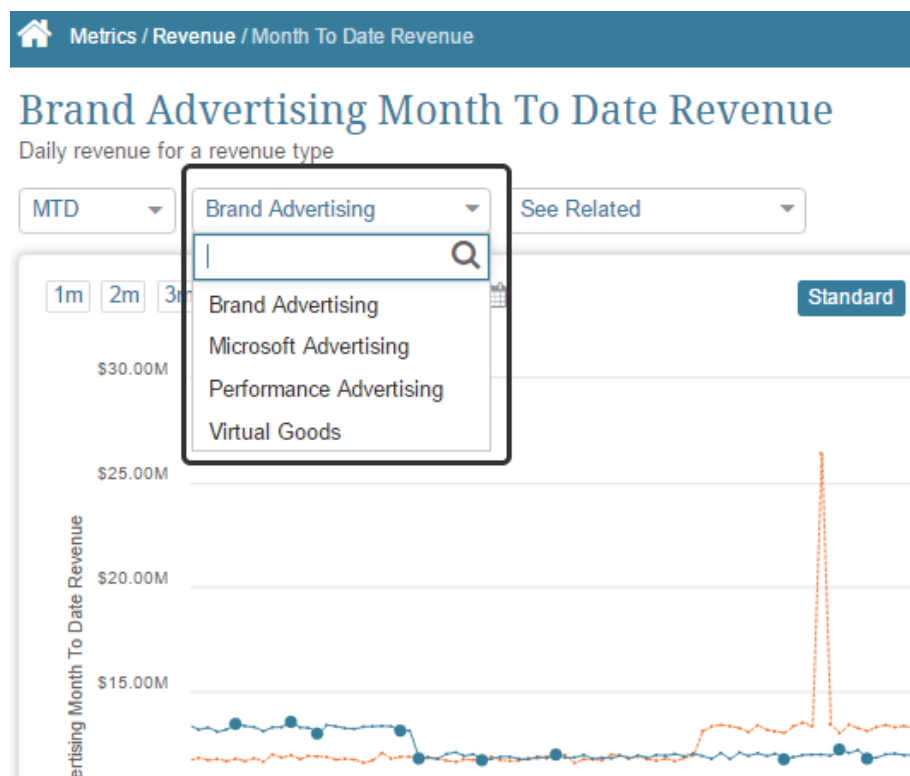


# 1. On the Homepage select one of the visible dimensioned Elements



The Metric Viewer opens.

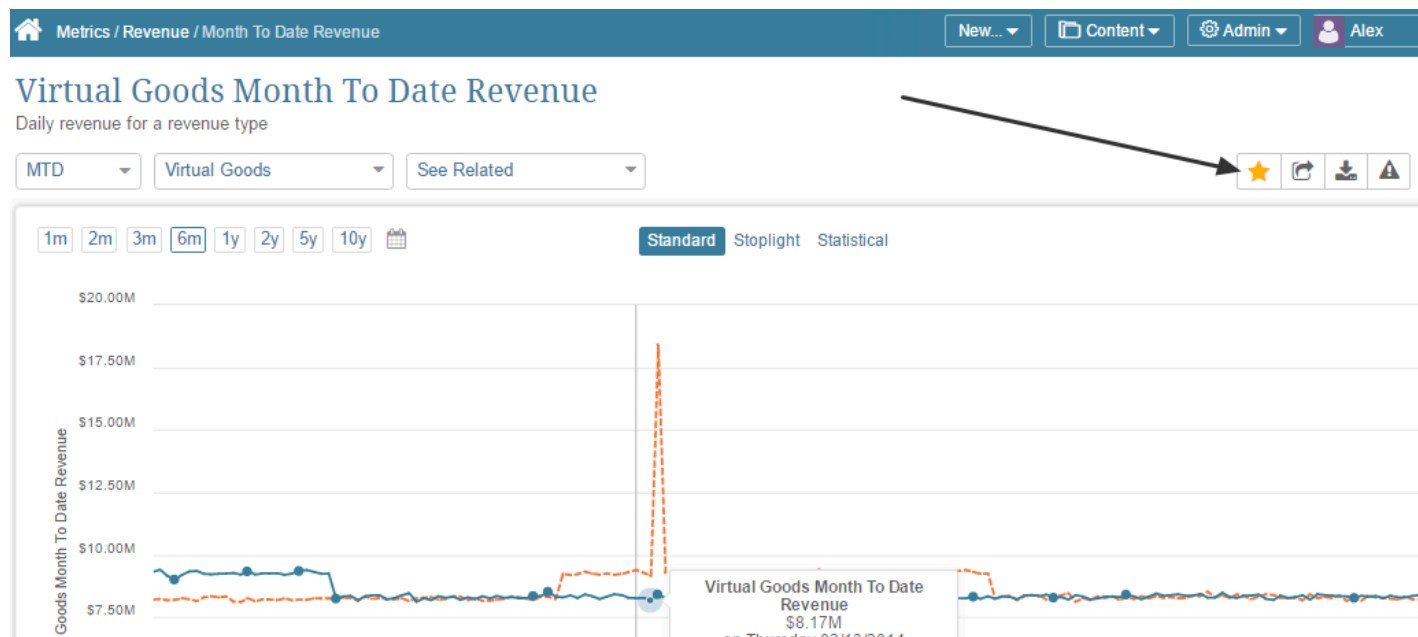
# 2. Open the Dimension drop-down list



Select 'Virtual Goods' (the Dimension Value for which no tile is shown on the Homepage) from the drop-down list.

The 'Virtual Goods Daily Revenue' *Metric Viewer* opens.

### 3. Click on Star to add to a Favorites folder



For more information, see [Add \(or Delete\) Elements to a Favorites folder](#)

### 4. Return to the Homepage

METRIC INSIGHTS

Show All

Favorite Folders

- ★ My Favorites
- ★ KPI Elements
- ★ France favorites

Categories

- 1010data Demo
- 1067
- 2
- 222 test topics
- Active Users
- AL RT Grandparent
- AL RT Parent 1

All Topics No Filter Favorites &

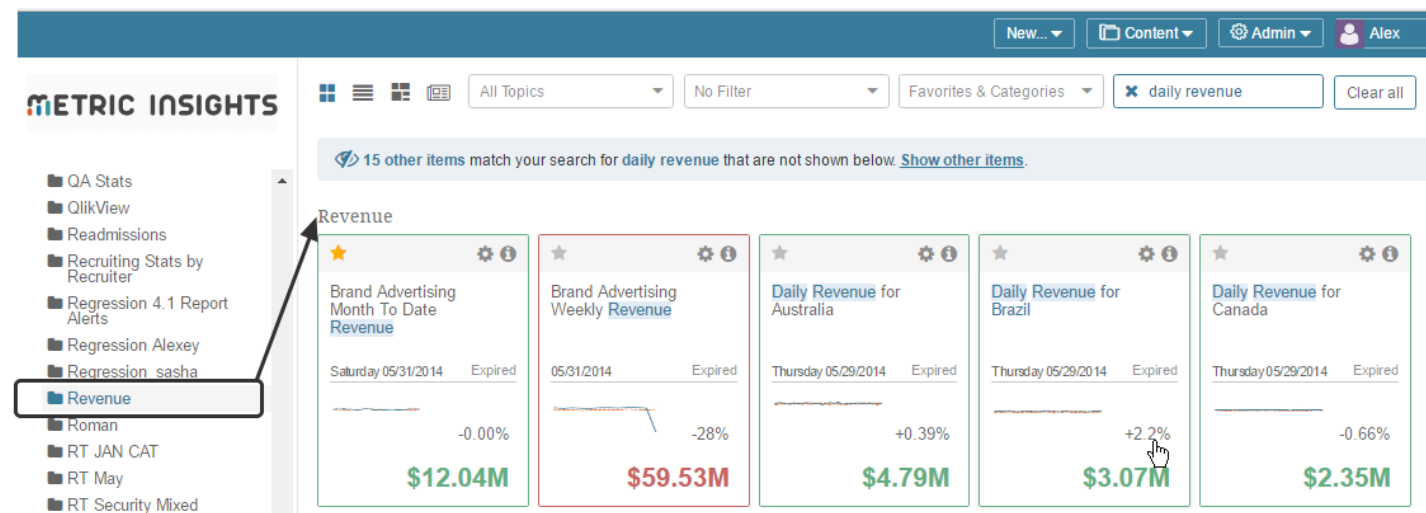
26 other items match your search for revenue that are not shown below. [Show other items.](#)

My Favorites

Metric	Value	Change
Brand Advertising Month To Date Revenue	\$12.04M	-0.00%
Performance Advertising Weekly Revenue	\$54.87M	-28%
Virtual Goods Month To Date Revenue	\$8.39M	-0.00%

The 'Virtual Goods' tile now appears on a **Show All** view with a gold star signifying it has been included to one or several **Favorite Folders**. Therefore, this tile is also shown in a corresponding Favorite Folder.

## 4.1. Note that the exposed tile is not shown in any of the Categories



## 6.7 How to share your Favorites folder

**!** Beginning with Release 5.2.0, Sharing Favorite Folders has been replaced with a more sophisticated way of Sharing Folders. See new updated functionality in [Understanding Folders \(new in Release 5.2\)](#)

This lesson will show how you can share one of your Favorite Folders with either individuals or groups of individuals. You can specify if the Users may 'maintain' their own versions of the folder - thus allowing them to delete and add elements on their HomePage.

When you share a folder, all options which you have set including sorting and summary comparisons will be propagated to folders you have shared. Users are free to alter these options for their own version to control Digest frequency and contents.

After initial sharing, any tiles added or deleted from your folder will cause the same elements to be added or deleted from all shared folders.

Changes made to the various display option for the Digest will not be propagated to those already sharing the Favorites folder. There is also an option, 'Re-Share', that allows you to completely replace the shared folder(s) with all new options and elements. Please note: this will remove any changes that other users have made to their version of the shared folder.

Users are restricted to sharing Favorite Folders with those Groups of which they are members. There is an additional restriction that only Administrators can share folders with the '**Default Group**'.

### 1. [Option 1] Via the Homepage

The screenshot displays the METRIC INSIGHTS homepage. On the left sidebar, under 'Favorite Folders', the 'My Favorites' folder is highlighted with a circled '1' and an arrow pointing to it. The main content area shows a grid of dashboard tiles. The first tile, 'Australia Monthly Sales', is highlighted with a red border. To the right of the tiles, a 'Manage' dropdown menu is open, showing options like 'Add/Remove Tiles', 'Folder Settings', 'Bursts', 'Download PPT', 'Share Folder' (highlighted with a circled '3' and an arrow), 'Duplicate Folder', and 'Delete Folder'. A circled '2' is also present near the 'Manage' dropdown.

1. Select one of your favorite folders at the *Homepage*
2. At the top right corner of the screen open the **Manage** menu
3. Select the **Share Folder** option

## 1.1. [Option 2] Via My Preferences > My Favorites

My notifications are ON for emails, SMS and Phone Alerts · Monday - December 19, 2016 System 15:57 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

Maintain content, schedule and sharing of your Favorite folders

### 2 Favorite Folders

Favorite Folders	Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5			⚙️ 🔍 📄 🗑️
My Favorites	8	✓		⚙️ 🔍 📄 🗑️
Tableau Alerting	2			⚙️ 🔍 📄 🗑️
P&L Demo	0			⚙️ 🔍 📄 🗑️
Mobile	3			⚙️ 🔍 📄 🗑️
Sales	10	✓		⚙️ 🔍 📄 🗑️

1. In **My preferences** menu below your username select **My Favorites**
2. The list of your Favorite Folders opens
3. Select the folder

## 2. Click the 'Add User or Group' button

Share List for My Favorites
×

Currently, you do not share this Favorite section with anyone.

[+ Add](#)

[Add User or Group](#)
[Done](#)
[Send email Digest](#)

### 3. Complete 'Share Favorite' pop-up







The screenshot shows a 'Share Favorite' dialog box with a close button (X) in the top right corner. The dialog contains the following elements:

- 1** 'Share as' text input field containing 'Favorites Shared'.
- 2** 'Share with' section with two radio buttons: 'User' (unselected) and 'Group' (selected).
- 3** 'Group' dropdown menu showing 'Consultants'.
- 4** 'Group members maintain own content' section with two radio buttons: 'yes' (selected) and 'no' (unselected).
- 5** 'Preserve Favorite grid layout' section with two radio buttons: 'yes' (selected) and 'no' (unselected).
- At the bottom, a blue 'Save' button followed by the text 'or [cancel](#)'.

1. You must use the 'Share as' field to select a different name for your folder when it appears on other user's Homepage. This name must be unique across the system. The folder name will not change on your Homepage
2. Toggle between User and Group to vary the pick-list in next field
3. A Pick-list of either all Users or all Groups of which you are a member will appear for selection (NOTE: 'Default Group' will only appear in Pick-list for Admin Users)
4. You may allow others to update the contents of this folder on their own Homepage if you wish. Please see details regarding this at [Implications of Sharing a folder that other can maintain](#)
5. You can also select to copy the format you have created in your Grid view

## 4. You will see entries populated in your Share List

### Share List for My Favorites ×

User and Groups				
Type	Name	Shared Folder Name	Users Maintain Own Content?	
Group	Default Group	Favorites Shared	Y	 
Group	Consultants	Favorites Shared	Y	 
User	Abby Johnes	Favorites Shared	Y	 

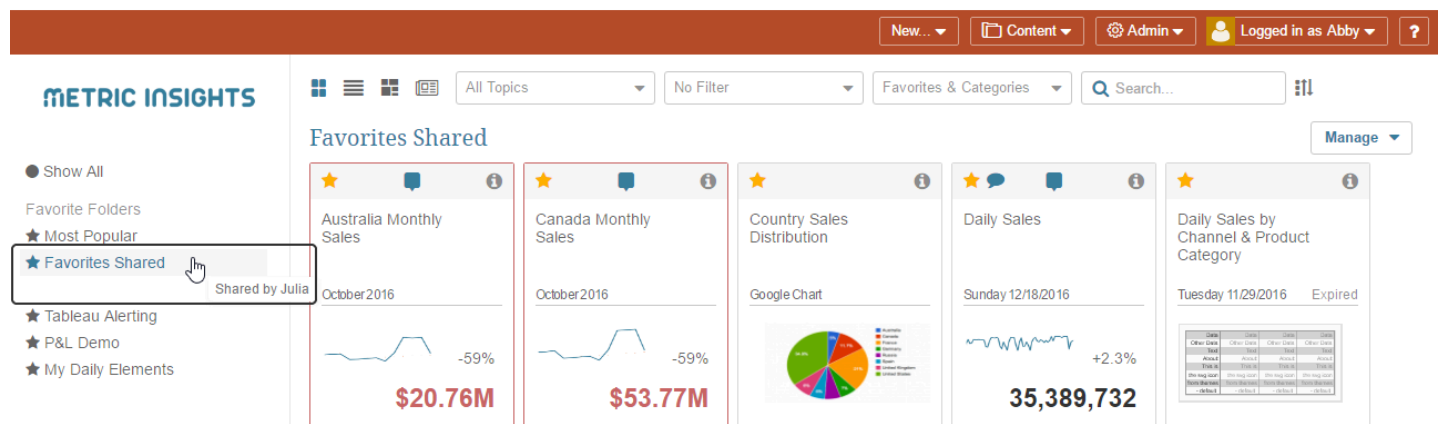
Add User or Group

Done

Send email Digest

1. You can repeat this process to add more users and groups
2. Exit via the **Done** button
3. Or send this Favorite folder via **email** to all shared accounts

## 5. Your folder will now appear on their Homepages with a different name



The screenshot shows the Metric Insights dashboard. On the left sidebar, under 'Favorite Folders', the 'Favorites Shared' folder is highlighted with a red box and a mouse cursor. The main content area displays the 'Favorites Shared' folder's contents, which include five items: 'Australia Monthly Sales', 'Canada Monthly Sales', 'Country Sales Distribution', 'Daily Sales', and 'Daily Sales by Channel & Product Category'. Each item has a star icon, a share icon, and an information icon. The 'Australia Monthly Sales' and 'Canada Monthly Sales' items show a line chart for October 2016 with a -59% change and values of \$20.76M and \$53.77M respectively. The 'Country Sales Distribution' item shows a pie chart. The 'Daily Sales' item shows a line chart for Sunday 12/18/2016 with a +2.3% change and a value of 35,389,732. The 'Daily Sales by Channel & Product Category' item shows a table with columns for Date, Channel, Product, and Sales.

1. When Anna hovers-over the folder name on their Homepages, the system will display that the folder is owned by Abby.
2. In this example, you can see the Grid view that Abby requested to be preserved. Anna can now change the Grid view if desired.

**NOTE:** All **Settings** from Abby's folder will be copied to the shared folders; this may cause a Favorites digest to be generated for the other Users.

## What would you like to do next?

[Add \(or Delete\) Elements to a Favorites folder](#)



## 6.8 How to Unshare your Favorite folder

**!** Beginning with Release 5.2.0, Sharing Favorite Folders has been replaced with a more sophisticated way of Sharing Folders. See new updated functionality in [Understanding Folders \(new in Release 5.2\)](#)

Once you have shared a folder, clicking on the **Share** icon will display the list of those currently sharing the folder. From this grid, you can remove a user or group using the **Delete** icon.

### 1. Access My Preferences > My favorites

The screenshot shows the 'My Favorites' section of the application. At the top, there's a navigation bar with 'My Favorites', 'New...', 'Content', 'Admin', and a user profile 'Julia'. Below this, a status bar indicates 'My notifications are ON for emails, SMS and Phone Alerts' and shows the date 'Wednesday - January 4, 2017' and system time '14:20 UTC(UTC +00:00)'. A row of icons for 'Notifications', 'Alerts', 'Favorites', 'Bursts', 'Schedules', 'Settings', and 'Mobile' is present. The 'Favorites' icon is selected. Below the icons, a heading 'Favorite Folders' is followed by a table. The table has columns: 'Display Name', 'Number of Elements', 'Include in Digest', and 'Actions'. A callout bubble points to the 'Share' icon (a square with a circular arrow) in the 'Actions' column of the 'My Favorites' row.

Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5		Settings, Alerts, Mobile, Share, Delete
My Favorites	8	✓	Settings, Alerts, Mobile, Share, Delete
Tableau Alerting	2		Settings, Alerts, Mobile, Delete
P&L Demo	0		Settings, Alerts, Mobile, Share, Delete
Mobile	3		Settings, Alerts, Mobile, Delete
Sales	10	✓	Settings, Alerts, Mobile, Share, Delete

**NOTE:** You can share only those Favorite Folders that you have created.

In the **Favorite Folders** table click the **Share** icon for a respective folder.

The *Share List for My Favorites* pop-up opens.

## 2. Select the Delete icon (Trashcan) for a user or group

## Share List for My Favorites

User and Groups				
Type	Name	Shared Folder Name	Users Maintain Own Content?	
1 Group	Default Group	Favorites Shared	N	 
Group	Consultants	Favorites Shared	Y	 
2 User	Abby Johnes	Favorites Shared	Y	 

Add User or Group
Done
Send email Digest

User / Group will be removed from the Share list

1. If the User does **not** have the ability to '**Maintain own content**' (as Default group in the example), the folder will be removed completely from the User's *Homepage*.
2. If the User has the ability to '**Maintain own content**' (as Abby Johnes in the example), the folder can be kept as personal folder or folder can be deleted from the user with whom it was shared (see next step).

## 2.1. If the User has the ability to Maintain Content the following pop-up will appear

×

## Delete this folder

Do you want to delete this folder from the users with whom you have shared it or leave it in place as a personal favorites folder for those users?

Delete Folder

Keep Folder

or cancel

1

2

1. **Delete Folder:** will completely remove folder from the Homepage of all Users in the Group.
2. **Keep Folder:** will leave your favorite folder for Abby Johnes but it becomes her 'Personal' Favorites' folder. Changes you make to this folder will no longer affect her copy of the folder.

## 6.9 What are Favorites Digests?

A Favorites Digest is an email that the system sends you on a regular basis with updates to those elements that have been included in your Favorites folder(s). Before requesting a 'Favorites Digests', you must first either:

1. Place one or more tiles in your personal favorites folder OR
2. Have access to at least one Shared Favorites folder

For more information on Favorites, see: [Favorites - Overview](#)

After defining your Favorites, you can request an email notification be sent to you on a scheduled basis containing all those elements which have changed. [See Change the timing for receiving Favorites Digests.](#)

Below is an example of the structure and type of information that you'll see in a Favorites Digests. To request a digest see [Requesting a 'Daily' Favorites Digest.](#)

NOTE: your company may have customized Digest templates, so the format may not be exactly as show below

# Example using the Default template (Favorites with Headlines)

Daily Favorites Digest Inbox x

UMA <uma@app.metricinsights.com>  
to me

8:32 AM (3 minutes ag

### Top Movers

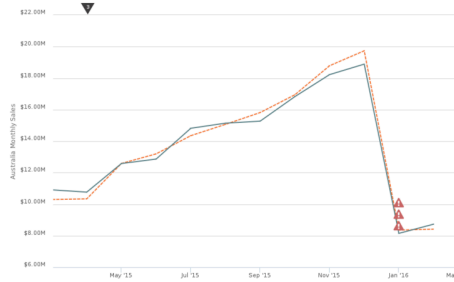
<div>Australia Monthly Sales</div> <div>February 2016</div> <div></div> <div>7.1% \$8.73M</div>	<div>Daily COGS for wine</div> <div>Sunday 03/13/2016</div> <div></div> <div>-3.5% 2,852,718</div>	<div>Daily COGS for wine furniture</div> <div>Sunday 03/13/2016</div> <div></div> <div>3.2% 776,469</div>
---	--	---

In this template, the most active elements will be highlighted in the **Top Mover** section

# Separate sections for each Favorites folder

## Abby's Favorites

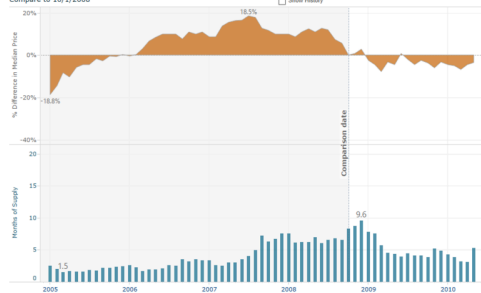
Australia Monthly Sales



## Tableau Alerting

Home Price and Supply

Home price change and months of supply

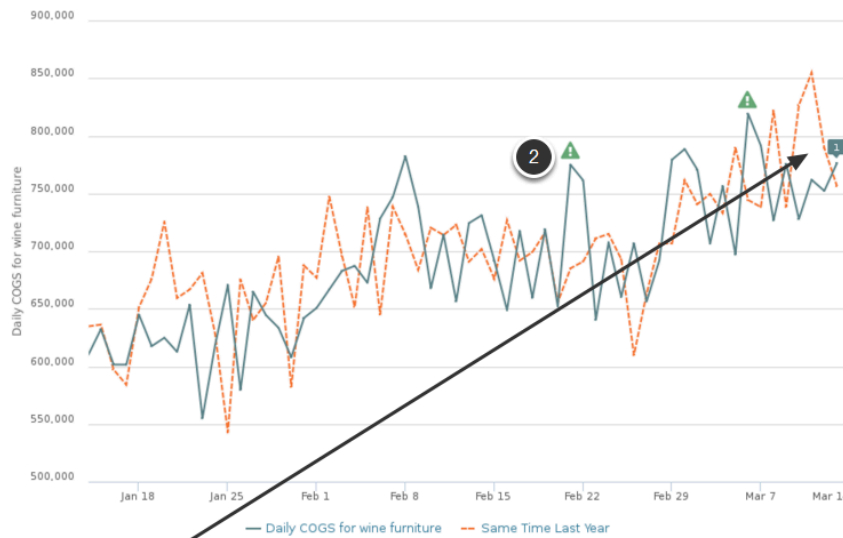


Home Price and Supply Tableau

If you have requested multiple folders in one consolidated digest, each section will be broken out by Favorites folder. This example shows 2 Favorites Digests: "Abby's Favorites" and "Tableau Alerting"

# The 'Body' of the Digest contains a Chart View and links

## 1 Daily COGS for wine furniture



Daily Sales for a Product Category Mertic

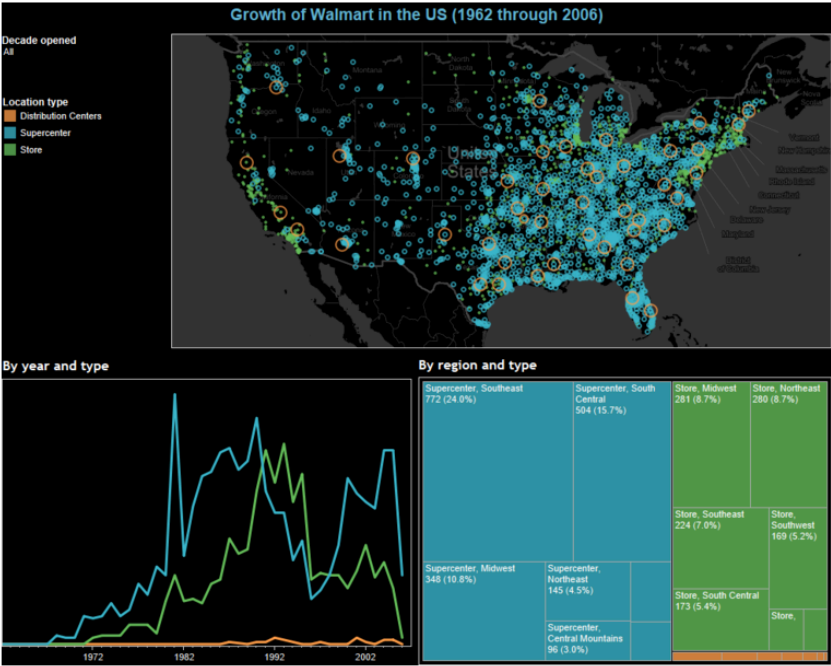
Last measured on Sunday 03/13/2016 for 776,469

3 **776,469 on Sunday 03/13/2016:** The dip in sales bothers me, can you verify the data is correct?  
— Annotated by **Anna Kennedy** on Monday 03/14/2016 at 09:28

1. Title of Chart is a link to 'live' version
2. Alerts and Annotations will appear as they do on 'live' chart
3. Contents of Annotations will appear below the chart image

# External Reports may contain multiple links

1 Sales / Growth of Walmart



2 <https://tableau-prod.metricinsights.com/views/Sales/GrowthofWalmart>

1. Links to image in Metric Insights (will contain alert and annotation information)
2. Links to source dashboard

## Optionally, you may see a link that allows you to Unsubscribe from this Digest

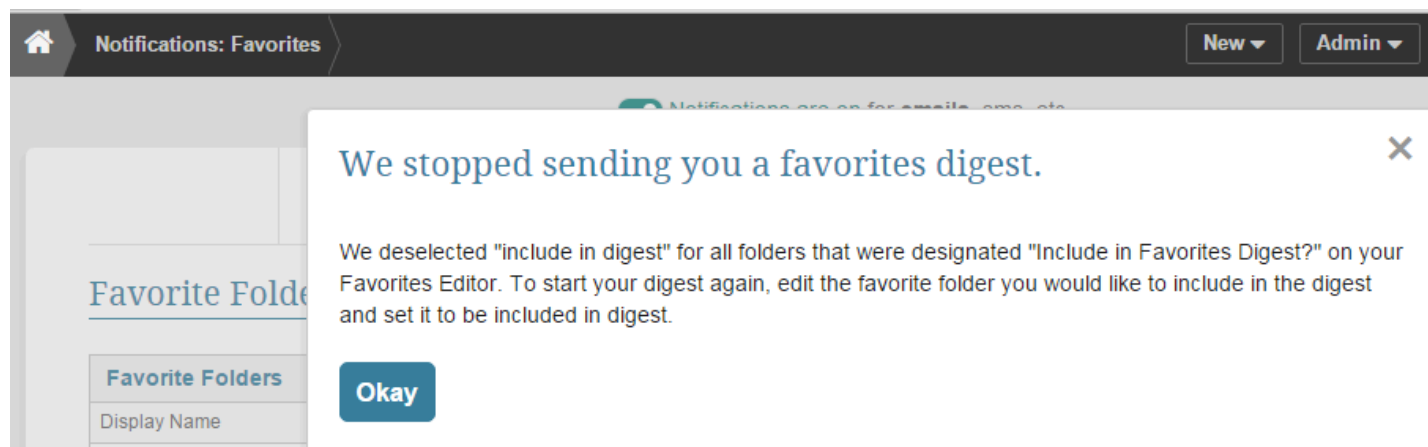
Digest for [bk@metricinsights.com](mailto:bk@metricinsights.com) sent from <https://uma.metricinsights.com/>  
Have questions? Contact: [support@metricinsights.com](mailto:support@metricinsights.com)

The information in this digest is company confidential  
Copyright © 2016 All Rights Reserved

 Stop sending this digest

BRIDGING THE LAST MILE TO  
BUSINESS INTELLIGENCE  
AND BIG DATA

## Result of 'Stop Sending this digest' link



If you select to **Stop sending this digest**, you will be transferred to *Notifications: Favorites* screen where the included folder(s) will have been unchecked. Note that you can restart your digest again at any time.

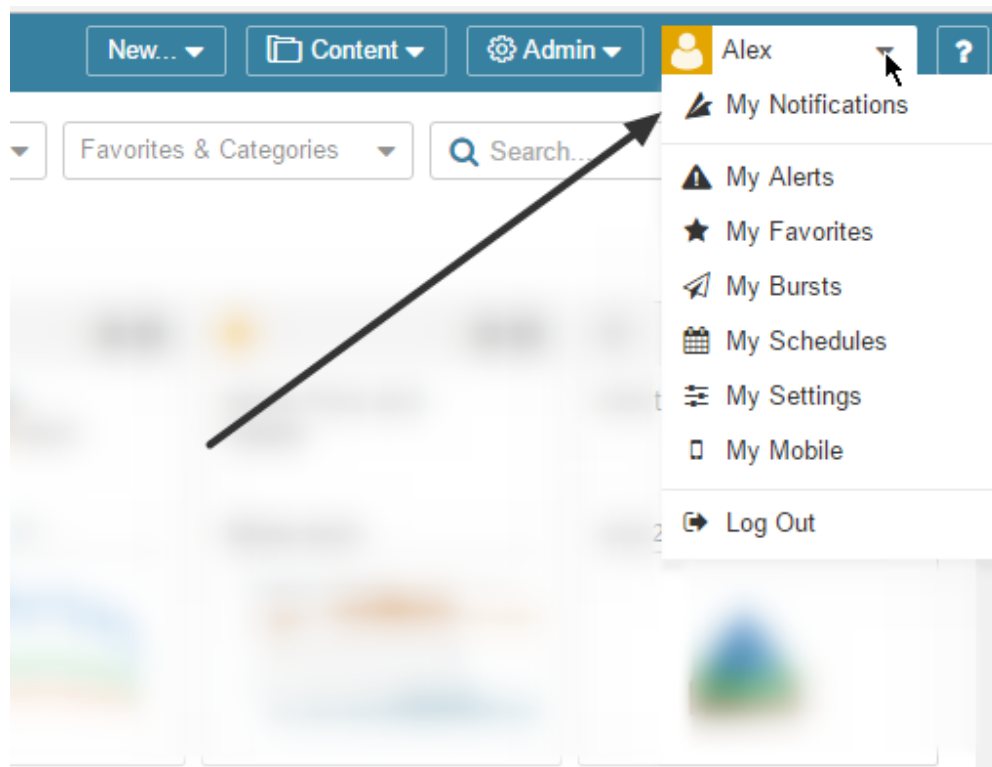


## 6.10 Requesting a 'Daily' Favorites Digest

The following steps show how to request a 'daily' email digest to inform you of any changes to elements in one or more of your Favorites digests.

Hover over your name on the Home Page to display the link to the Favorites *Editor*.

### 1. Hover over your name to display the link to My Notifications



## 2. To set options for receiving a Favorites Digest

**My Notifications** New... Content Admin Alex

1 My notifications are ON for emails, SMS and Phone Alerts · Tuesday - January 3, 2017 System 01:45 UTC(UTC +00:00)

Notifications Alerts Favorites Bursts Schedules Settings Mobile

**Notifications**

Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Notifications						
	Name	Type	Schedule	Send to	Last Sent Date/Time	
2	<input checked="" type="checkbox"/> Favorite Digest	3 Consolidated	Daily (Every day at 0:00)	bk@metricinsights.com	2017-01-03 00:26:00	
	<input type="checkbox"/> Daily Items for Review (Alex Ke...	Burst	Daily M-F (On Mon, Tue, Wed, Thu & Fri at 0:00)	bk@metricinsights.com		
	<input type="checkbox"/> Immediate Alerts	Email, SMS	Immediate Distribution Schedule (Every 3 min...	Email: barbara_e_kennedy@... SMS: 9072990007@txt.att.net		
	<input type="checkbox"/> Alert Digest	Digest	Daily (Every day at 0:00)	barbara_e_kennedy@MSN.COM		
	<input type="checkbox"/> Collaboration Notifications	Email		bk@metricinsights.com		
	<input type="checkbox"/> Expired Element Digest	Digest	Daily (Every day at 0:00)	barbara_e_kennedy@msn.com		

Save changes

1. Make certain that **My Notifications** are 'ON' - if not, adjust with toggle
2. Verify that **Favorite Digests** is checked (ON)
3. Your options for receiving Digest are displayed

Select the edit icon (gear) to adjust the options

### 3. Adjust options in pop-up

**Favorite Digest**

1 Send emails to

2 Send Favorite Digest with

3 Send folders as ☒ a single large email | ☐ individual emails

4 Email template

or [cancel](#)

Favorite (default)  
Burst - Any Image Size  
Burst - Fixed Image Size  
Favorite  
Favorite Simplified  
Favorites Top Movers  
**Favorites with Headlines**  
Our Custom Fav Template

1. **Send emails to** will default to your the email associated with your logon - you may enter any valid email here
2. Select a time when you wish to receive the Digest (drop-down will display both a Public and any Private Schedule you may have)
3. You can select to receive a **separate** digest for each folder or **single** digest containing all selected folders
4. If your company has setup multiple Email templates, you make that selection here

See this article for more information on [Setting up Private Schedules](#)

## 4. Access 'Favorites' from top line of Notifications

The screenshot shows the 'My Favorites' page in the Metric Insights application. At the top, there's a navigation bar with 'My Favorites', 'New...', 'Content', 'Admin', and a user profile 'Alex'. Below this, a status bar indicates 'My notifications are ON for emails, SMS and Phone Alerts - Tuesday - January 3, 2017 System 02:04 UTC(UTC+00:00)'. A main navigation bar contains icons for Notifications, Alerts, Favorites (highlighted with a star), Bursts, Schedules, Settings, and Mobile. The 'Favorite Folders' section is titled 'Maintain content, schedule and sharing of your Favorite folders'. It contains a table with the following data:

Favorite Folders	Number of Element	Include in Digest	Actions
Most Popular	5	<input checked="" type="checkbox"/>	
KPI Elements	2	<input checked="" type="checkbox"/>	
My Favorites	0	<input checked="" type="checkbox"/>	
Tableau Alerting	1	<input checked="" type="checkbox"/>	
Hourlies	1	<input checked="" type="checkbox"/>	

Below the table is a '+ New Favorite Folder' button. At the bottom, there are buttons for 'Preview Favorites Digest' and 'Send now' (with a note: 'This will send an email to bk@metricinsights.com'). An 'Edit Favorite' pop-up is overlaid on the table, showing the 'Display name' as 'Most Popular' and the 'Include in Favorites Digest' toggle set to 'yes'. The pop-up also has a 'Save' button and a 'Cancel' link.

1. Some or all of your Favorites folders may be already set for inclusion in your digest. There is an indicator for this on the Favorites grid.
2. To change this value, click the **Edit (Gear) icon** for a Favorites Folder to display the *Edit Favorite* pop-up
3. On the this pop-up, toggle to the correct choice for **Include in Favorites Digest?**

## 4.1. If you select " Yes" to Include in Favorites Digest, further options are available for customizing each Digests individually

**Edit Favorite**

Display name: Most Popular

Include in Favorites Digest: ☒ yes | ☐ no

1 Include in Digest on: ☒ element update | ☐ Data Collection Trigger completion

Include element downloads: ☐ yes | ☒ no

[Embed codes](#)

2 **Digest Template Settings**

Included Settings Values	
Name	Value
Top movers: Allow calculate metric affinity score	N
Top movers: Category affinity weight	1
Digest show unsubscribe link	Y
Digest width external report	1200
Favorite digest external report link on	Chart_view
Footer image	
Header image	
Include alerts	Y
Include annotations	Y
Max digest alerts display	3

3

Save or [cancel](#)

1. The default is to only Include in Digest when an element is updated. To change this, see [Using Notifications: Favorites Editor to Maintain Favorites](#)
2. The options displayed here will be based on the Digest template chosen in Step 3.
3. Click **Edit (Gear) icon** to change options

When completed, **Save**

# 5. You can preview on-line or request an 'Immediate' Favorite Digest to verify settings

My Favorites

New...ContentAdminAlex

My notifications are ON for emails, SMS and Phone Alerts • Tuesday - January 3, 2017 System 02:29 UTC(UTC +00:00)

NotificationsAlertsFavoritesBurstsSchedulesSettingsMobile

Maintain content, schedule and sharing of your Favorite folders

Favorite Folders

Favorite Folders			Drag & Drop Rows to Re-Order
Display Name	Number of Elements	Include in Digest	Actions
Most Popular	5	✓	⚙️📄📧📱🗑️
KPI Elements	2	✓	⚙️📄📧🗑️
My Favorites	0	✓	⚙️📄📧🗑️
Tableau Alerting	1	✓	⚙️📄📧🗑️
Hourlies	1	✓	⚙️📄📧📱🗑️

+ New Favorite Folder

1

Preview Favorites Digest

2

Send now

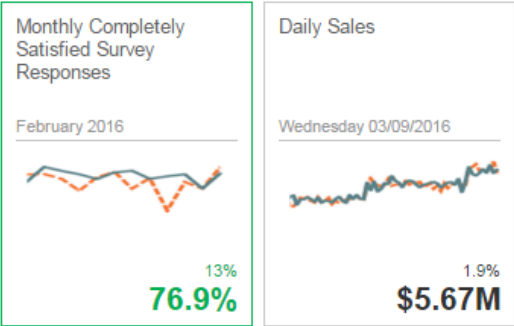
This will send an email to bk@metricinsights.com

## 6. Example of a on-line preview

Preview favorites



### Top Movers

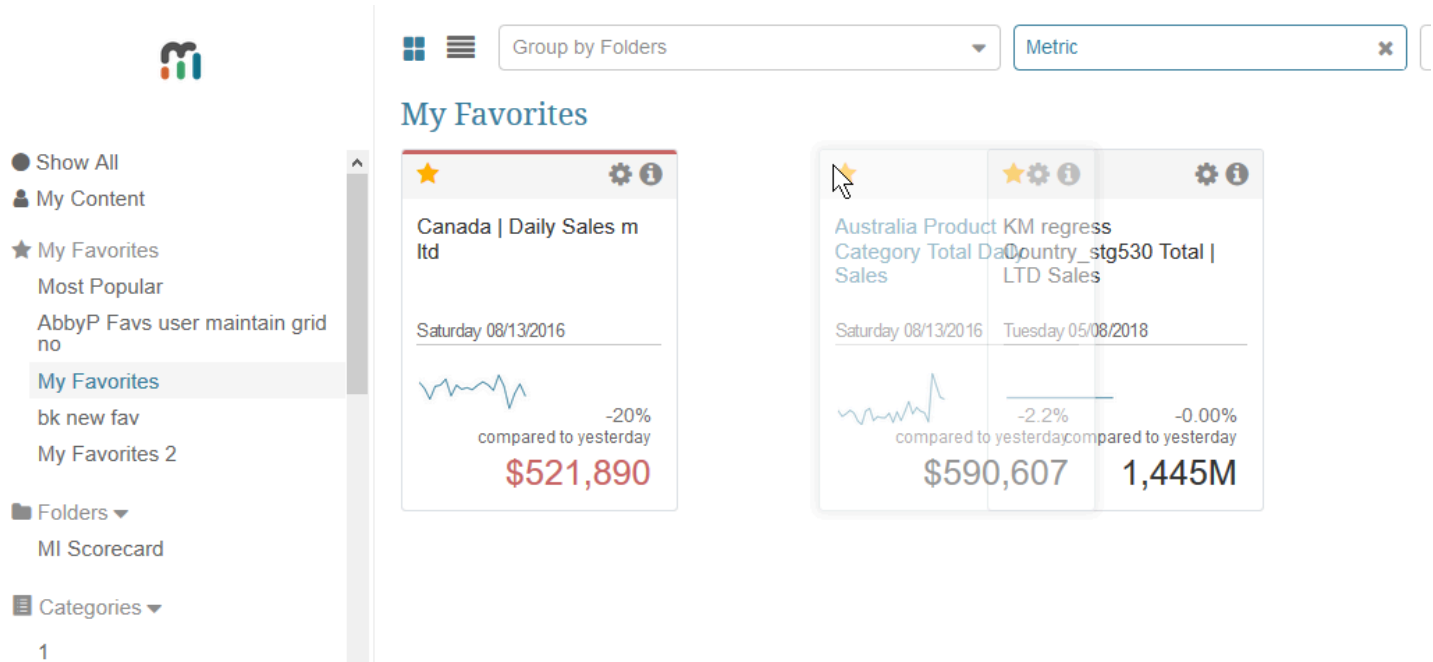


### Mv Favorites

Scroll to view entire Digest

# 6.11 How do I change the order of elements in my favorites daily digest emails?

## On the Homepage:



You can reorder the elements belonging to a favorite folder by dragging and dropping them in the right-hand panel of the Homepage.



## On the Favorites editor:

My Favorites

25

New...

Content

Admin

Anna

My notifications are ON for [emails](#), SMS and Phone Alerts · Wednesday - December 12, 2018 System 17:16 UTC(UTC +00:00)

Notifications

Alerts

Favorites

Settings

Mobile

Maintain content, schedule and sharing of your Favorite folders

### Favorite Folders

Display Name	Number of Elements	Include in Digest	Actions
bk new fav	4	<input checked="" type="checkbox"/>	
Most Popular	5		
AbbyP Favs user maintain grid no	3		
My Favorites	7		
My Favorites 2	7		

New Favorite Folder

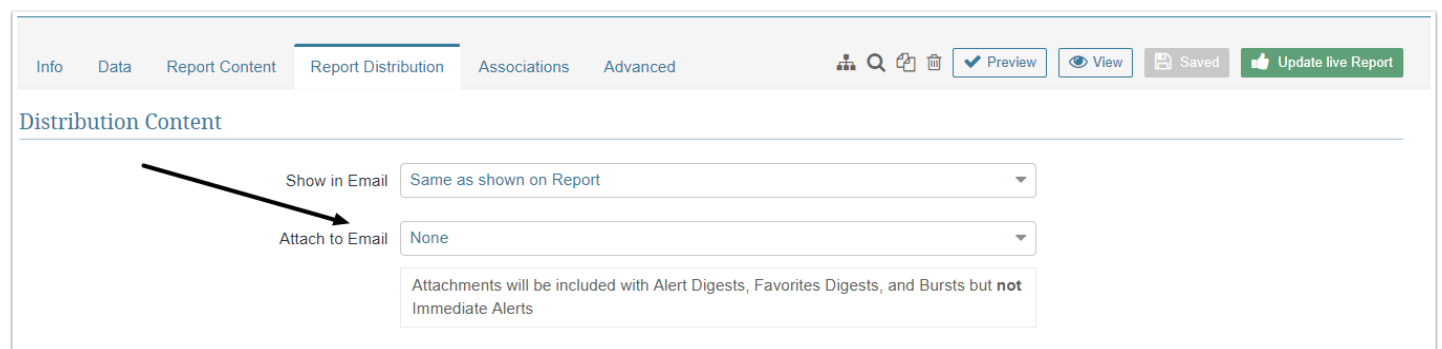
Drag &amp; Drop Rows to Sort

The order that you specify in the favorites folder will be preserved in favorite digests. (Note: If you have shared a favorite folder with other users, you will need to re-share it with them after your changes so they will also see the same order)

# 6.12 Include PDF, CSV, PPT or Excel file for element in Digest Emails

Here is how to include an attachment of your element as a PDF, CSV, PPT or Excel file. You can select the required file type from the dropdown in the Editor. The System defaults to *None*.

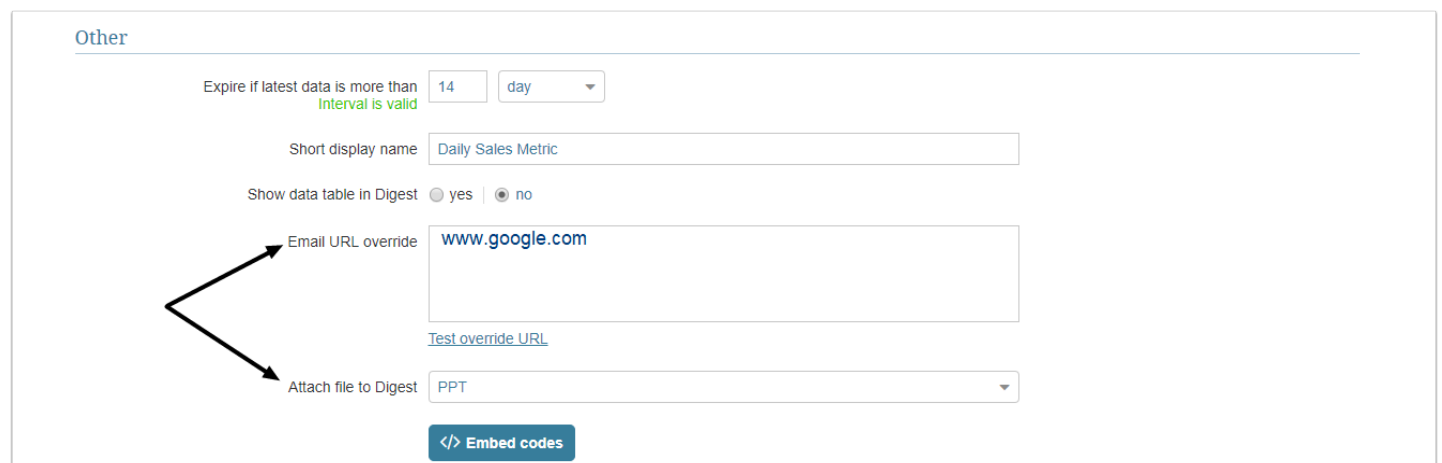
## 1. Setting Reports



The screenshot shows the 'Report Distribution' tab in the Report Editor. The 'Attach to Email' dropdown is set to 'None'. A black arrow points to the 'Attach to Email' label. Below the dropdown, a note states: 'Attachments will be included with Alert Digests, Favorites Digests, and Bursts but **not** Immediate Alerts'.

Use the "Attach to digest" field in the Report Editor on the "Report Distribution" tab.

## 2. Setting on Metrics



The screenshot shows the 'Advanced' tab in the Metric Editor. The 'Attach file to Digest' dropdown is set to 'PPT'. A black arrow points to the 'Attach file to Digest' label. Other visible fields include 'Email URL override' set to 'www.google.com' and 'Show data table in Digest' set to 'no'.

Optionally, include the page URL, to which Recipients are redirected when clicking on a Metric in an Email Digest.

Use the "Attach file to Digest" field in the Metric Editor on the "Advanced" tab (version 3.2 and later). Make sure you are in the Advanced Editor mode.

### 3. Setting on Favorite Folder Digest

#### Edit Favorite ✕

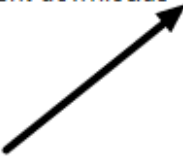
Display name

Include in Favorites Digest ☒ yes | ☐ no

Include in Digest on ☒ element update | ☐ Data Collection Trigger completion

Include element downloads ☒ yes | ☐ no

[Embed codes](#)

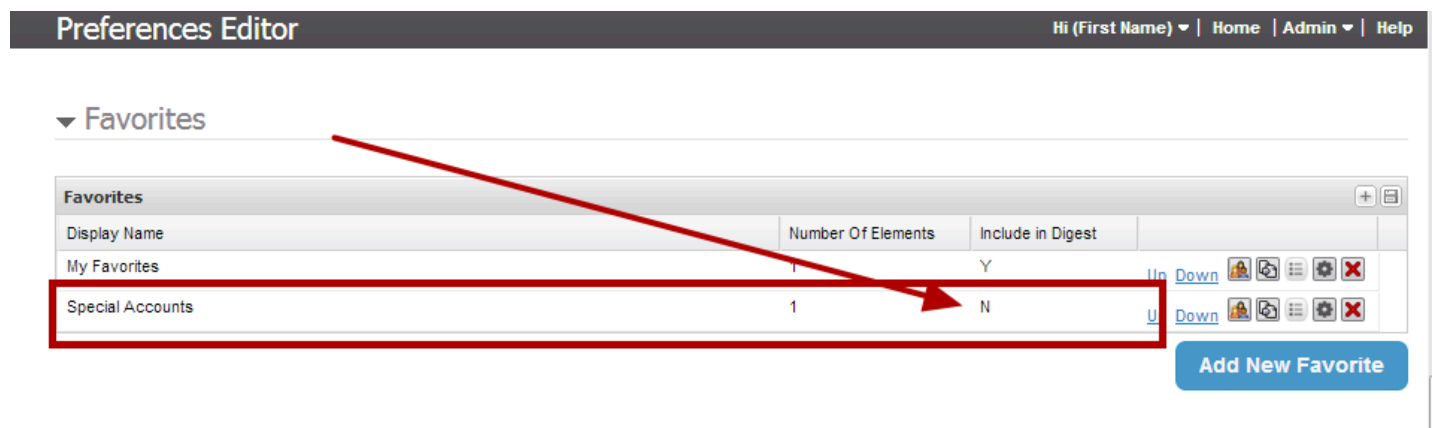


Make sure to "Include Element Downloads" for the favorite folder. Go to your Favorites page and click on the gear to the right to see these settings.

## 6.13 Why are some of my Favorites folder elements not included in the Favorites Digest ?

There are four different sets of rules that control what is displayed in your Favorites Folder Digest. You can verify these setting using the steps below.

### 1. The Preference Editor may not be set to include the Favorites folder in your Favorites Digest



The screenshot shows the 'Preferences Editor' interface. At the top, there is a header bar with 'Hi (First Name)' and navigation links for 'Home', 'Admin', and 'Help'. Below this, the 'Favorites' section is expanded, showing a table of favorite folders. The table has columns for 'Display Name', 'Number Of Elements', and 'Include in Digest'. Two entries are listed: 'My Favorites' and 'Special Accounts'. The 'Special Accounts' entry is highlighted with a red box, and its 'Include in Digest' value is 'N'. A red arrow points from the 'Favorites' section header to the 'Special Accounts' entry. Below the table, there is a blue button labeled 'Add New Favorite'.

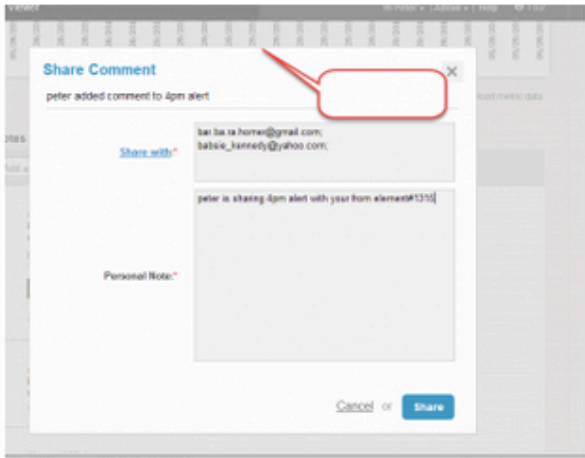
Display Name	Number Of Elements	Include in Digest
My Favorites	1	Y
Special Accounts	1	N

**Special Accounts** folder is set to 'Not be included in your digest'. To change this value, see lesson on [Requesting a Daily Favorites Digest](#)

## 2. 'External Content' elements are never included in Digests

★ bk External Content

SAMPLE



⚙️

Element ID: 847

👁️ Who else is watching this?

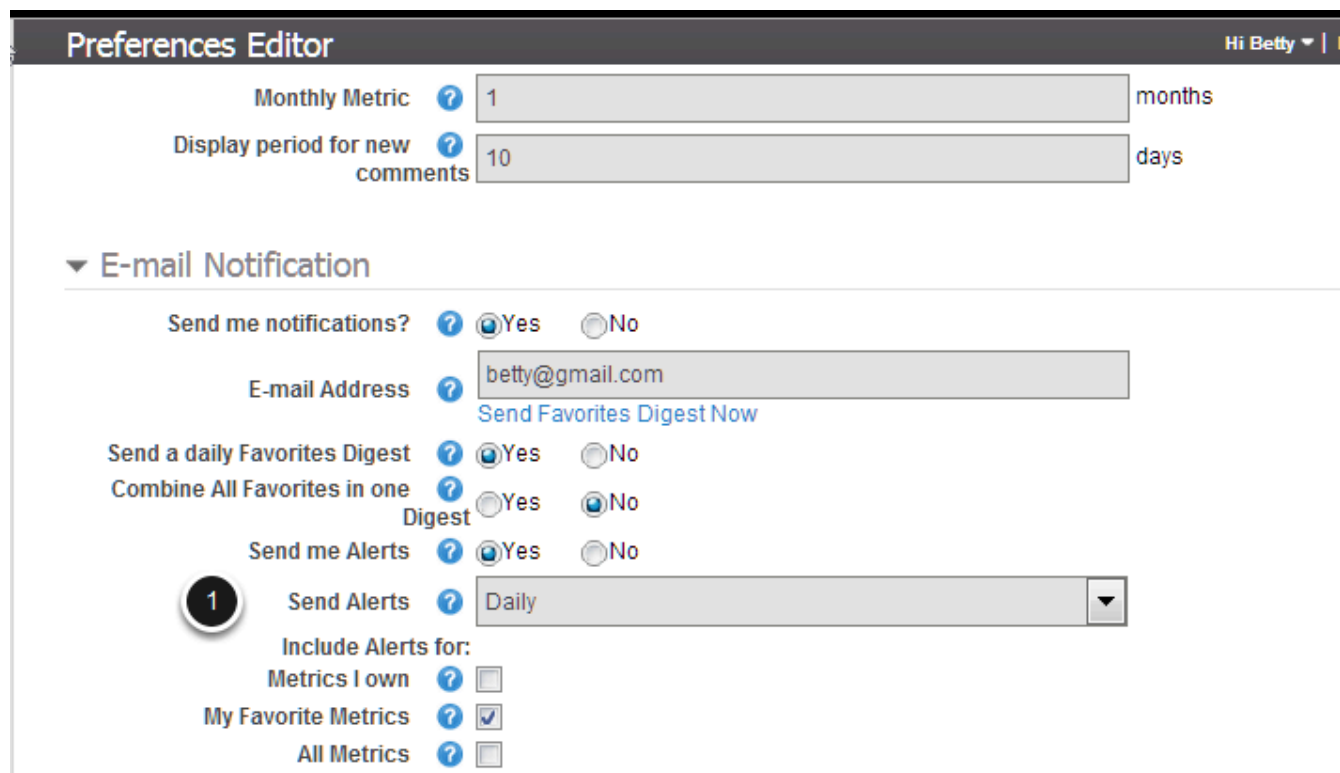
Digests are designed to inform you of changes in your data. **External objects** are one-time snapshots of data, and so are omitted from Digests as they never change

## 3. Report creator may have set only portions of data to display in Digest or to not display at all

Report creator may have set only portions of data to display in Digest or to not display at all

The contents of '**Reports**' in the Full Report View and the in Daily Favorites Digest are controlled independently by the Report's creator. A given report may be restricted to display only certain charts, pivot reports, underlying data. These settings may provide different online and digest views. For Example: You may be able to see a report using the Viewer but the creator may exclude it from a printing on a digest, or the digest may be set to only include a subset of the report values (e.g.: only the first or last <n> number of rows

## 4. If an Element is included in either your Alerts or Annotation digests, it is not duplicated in your Daily Favorites Digest.



The screenshot shows the 'Preferences Editor' interface for a user named Betty. At the top, there are two settings: 'Monthly Metric' set to 1 month and 'Display period for new comments' set to 10 days. Below these is a section titled 'E-mail Notification'. The first option is 'Send me notifications?' with radio buttons for 'Yes' (selected) and 'No'. The 'E-mail Address' field contains 'betty@gmail.com' with a 'Send Favorites Digest Now' link below it. The next option is 'Send a daily Favorites Digest' with radio buttons for 'Yes' (selected) and 'No'. Below that is 'Combine All Favorites in one Digest' with radio buttons for 'Yes' and 'No' (selected). The 'Send me Alerts' option has radio buttons for 'Yes' (selected) and 'No'. A circled '1' points to the 'Send Alerts' dropdown menu, which is currently set to 'Daily'. At the bottom, under 'Include Alerts for:', there are three checkboxes: 'Metrics I own' (unchecked), 'My Favorite Metrics' (checked), and 'All Metrics' (unchecked).

Preferences Editor Hi Betty ▾

Monthly Metric ? 1 months

Display period for new comments ? 10 days

▼ E-mail Notification

Send me notifications? ? ☒ Yes ☐ No

E-mail Address ? betty@gmail.com  
[Send Favorites Digest Now](#)

Send a daily Favorites Digest ? ☒ Yes ☐ No

Combine All Favorites in one Digest ? ☐ Yes ☒ No

Send me Alerts ? ☒ Yes ☐ No

1 Send Alerts ? Daily ▾

Include Alerts for:

Metrics I own ? ☐

My Favorite Metrics ? ☒

All Metrics ? ☐


1. These settings are located in your Preference Editor. To change this setting, see lesson on [How can I receive a notification of new Alerts and Annotations](#)

# 7. Basics of Alerting


# 7.1 Alerting for Regular User

Metric Insights offers 3 main types of Alerts that can be applied to Reports and Metrics. This article describes how Regular Users can "interact" with each of the Alert types (create/subscribe, etc.):

- [KPI Alerts](#)
- [Report Notifications](#)
- [Global Alerts](#)

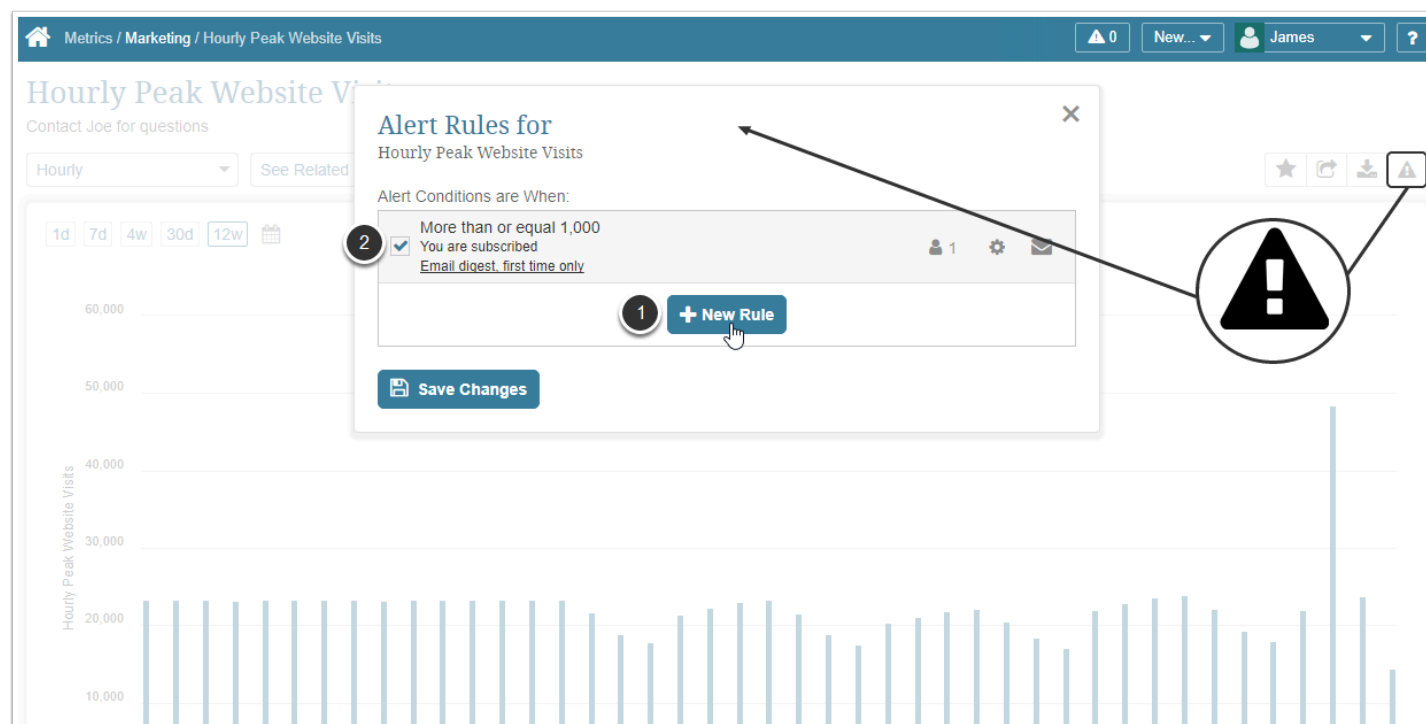
 Alerting was enhanced and simplified in Release 5.1 and those changes are reflected in this article. If your company is on a prior Release, see [Alerting in Version 4.2 / 5.0.x](#)

## KPI Alerts

 **Permissions:** Regular Users can create **KPI alerts** on any Metrics they can view if they have the following Privilege assigned to them either individually or via a Group membership: **Create Custom Alert**. Admin Users can assigning this Privilege at: *Admin > Users > User Editor > Info tab > Privileges section*.

**Available at:** *Metric Viewers*.





- Such Alerts are created to catch the specific changes occurring in Metrics. Such Rules can be represented by comparing a newly collected value:
  - to a fixed value:** For example, Alert me if a Value collected today is more or equal to 1.000.
  - to a prior value:** compare the latest measurement value to a prior value for the same Metric.
  - to an average of prior values:** compare the latest measurement value to the average of values recorded recently.
  - to the recent volatility levels:** compare the latest measurement value to the standard deviation of the average of values recorded recently.
  - combination of multiple alerts:** Mix and match the previously created Alert Rules.
- Regular users can subscribe to any public (meaning, available to all system users) Alert Rules for this Metric. All they have to do is check the box next to the Alert Rule condition and choose their own preferred distribution method.

## Alternative way for creating a KPI Alert Rule. How to check what KPI Alerts a Regular user is subscribed to?

The screenshot displays the 'My Alerts' interface. At the top, there's a status bar with a notification bell icon showing 5 alerts, a 'New...' button, and the user's name 'James'. Below this is a toggle for 'My notifications are ON for emails, SMS and Phone Alerts' with a timestamp. A navigation bar contains icons for Notifications, Alerts, Favorites, Settings, and Mobile. A dropdown menu for 'My Alerts' is open, showing options like 'My Notifications', 'My Alerts', 'My Favorites', 'My Settings', 'My Mobile', 'Type filter', and 'Log Out'. A table lists metrics: 'Hourly Peak Website Visits' and 'Monthly Marketing Spend by Spend Category Values', both with 0 alerts. A '+ New subscription' button is highlighted with a callout '2'. Below it, a 'New KPI Alert' modal is open, showing 'Existing Metric' selected and 'Hourly Peak Website Visits' chosen from the dropdown. A 'Next step' button is at the bottom of the modal.

1. To check out the list of KPI Alert Rules a User is subscribed to, go to: *My Preferences > My Alerts*.

The list of Metrics to which these KPI rules have been applied is shown. Click a Metric name to access its Viewer and review all the Alert Rules applied to it.

2. To create a new Rule from this screen, click **[+ New subscription]** to begin.

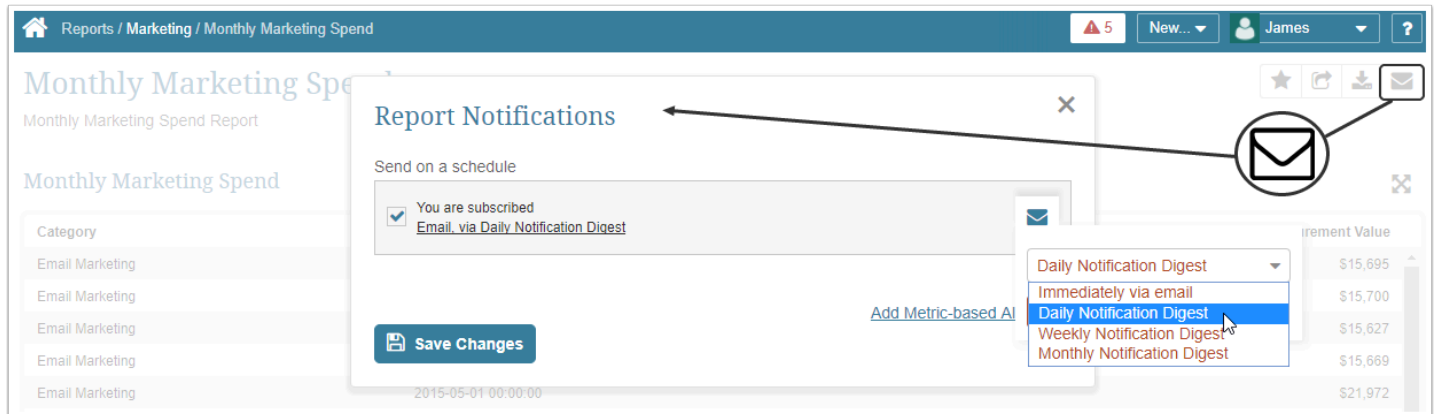
For Regular Users the only valid choice is **Existing Metric**, so from the drop-down list below choose a Metric to which an Alert Rule should be applied and click **Next step**. Then, define the Alert criteria. For details refer to: [\[KPI Alert Rules\] Wizard, types, criteria, user subscriptions](#)

## Report Notifications

- Permissions:** Regular Users can subscribe to a Report Notification (Immediate / Daily / Weekly / Monthly Digest) without any Privileges.

Metric-based Alert Rules cannot be created by Regular Users.

**Available at:** *Report Viewers.*



Whenever you want to subscribe to Report updates, click the **Envelope** icon at the upper right corner of the **Report Viewer**. Next, just check the subscription box to make this Notification active and define how often you would like to receive updates by choosing one of the available distribution options:

- Immediately via email: a user is going to receive an email only in case the Report consists of at least one new row after an update. If there are no new rows, an email will not be sent.
- Daily Notification Digest
- Weekly Notification Digest
- Monthly Notification Digest

To check what elements are included into Daily / Weekly or Monthly Notification Digest, go to *My Preferences (at the upper right corner of the screen click your Username) > My Notifications*. See the image below:

My Notifications

5

New...

James

My notifications are ON for [emails](#), SMS and Phone Alerts · Tuesday - July 11, 2017 System 12:18 UTC(UTC +00:00)

Notifications

Alerts

Favorites

Settings

Mobile

### Notifications


Maintain your notifications and Burst subscriptions; use the checkboxes to toggle on/off, and gears to configure. [Learn more](#) about Notifications.

Notifications					Disabled Schedule
	Name	Schedule	Last sent on	Send To	
<input checked="" type="checkbox"/>	Alert Digest	Daily (Every day at 0:00)		jmasters@regmail.com	⚙
<input checked="" type="checkbox"/>	Collaboration Notifications	Daily (Every day at 0:00)		jmasters@regmail.com	⚙
<input checked="" type="checkbox"/>	Daily Notification Digest	Daily (Every day at 0:00)		jmasters@regmail.com	⚙
<input type="checkbox"/>	Expired Element Digest	Daily (Every day at 0:00)		jmasters@regmail.com	⚙
<input checked="" type="checkbox"/>	Favorite Digest	Daily (Every day at 0:00)		jmasters@regmail.com	⚙
<input checked="" type="checkbox"/>	Immediate Alerts	Immediate Distribution Schedule (Every 1 minute)		Email: jmasters@regmail.com	⚙
<input type="checkbox"/>	Immediate Notification Digest	Immediate Distribution Schedule (Every 1 minute)		jmasters@regmail.com	⚙
<input checked="" type="checkbox"/>	Monthly Notification Digest	Monthly (On the 1st at 0:00)		jmasters@regmail.com	⚙
<input type="checkbox"/>	Weekly Notification Digest	Weekly (On Sun at 0:00)		jmasters@regmail.com	⚙

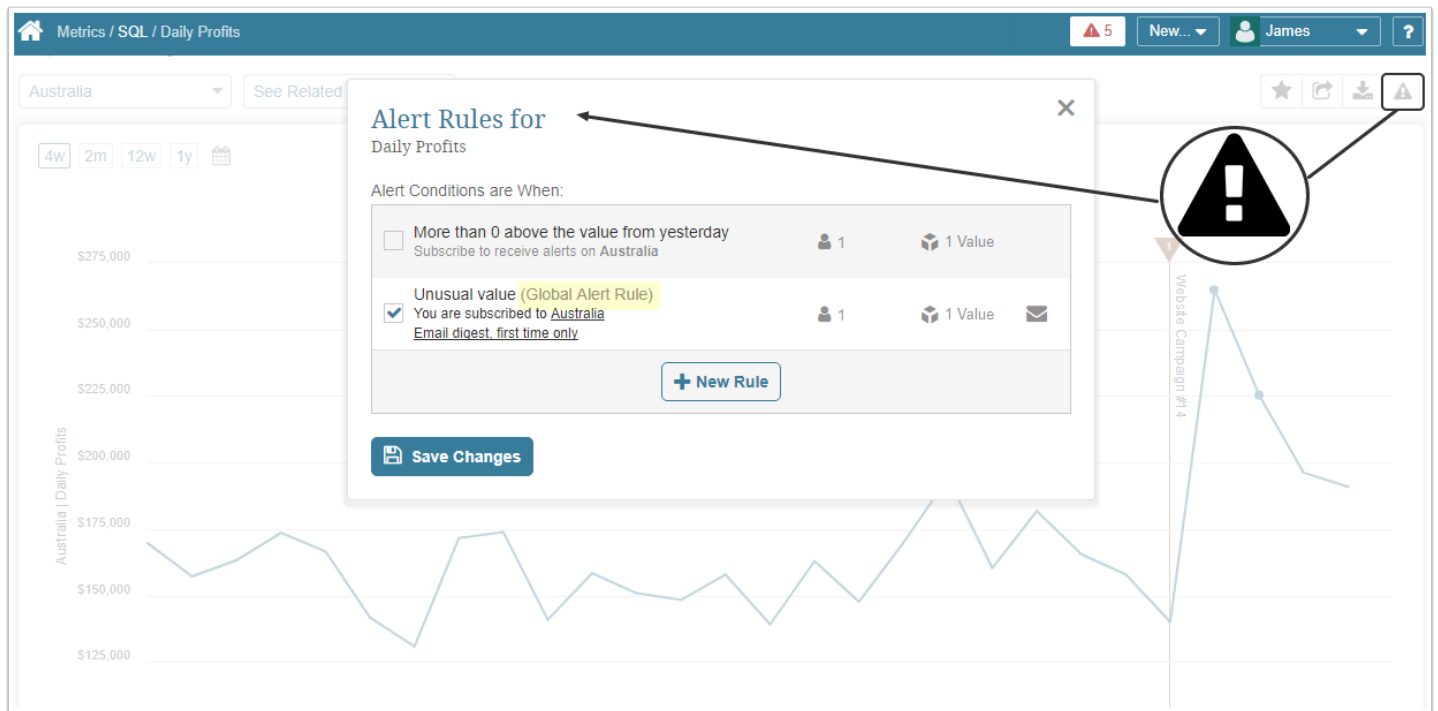
**NOTE:** Distribution schedules for these Digests are defined globally and cannot be changed according to personal User Preferences. For example, if a Daily Notification Digest is set up to be sent "Daily (Every day at 0:00)" by the Admin, every User subscribed to it is going to receive it at the same time. But the content of such Email digest is going to vary depending on User's subscriptions to Reports and his scope of element access.

Email address and email Template can be set up by clicking the Gear icon in the respective row.

## Global Alerts

 **Permissions:** Can be created by Admin users only, but when created are available for subscription for any system User (including Regular Users).

**Available at:** *Metric Viewers.*



Global Alert Rules are always labeled in a way so that it is easy to distinguish them from KPI Alert Rules.

Such Alerts are applied across a broad range of Metrics. For more details refer to: [\[Global Alert Rules\] How do they work for Metrics?](#)

## 7.2 Alerting for Regular User (prior to Release 5.1)

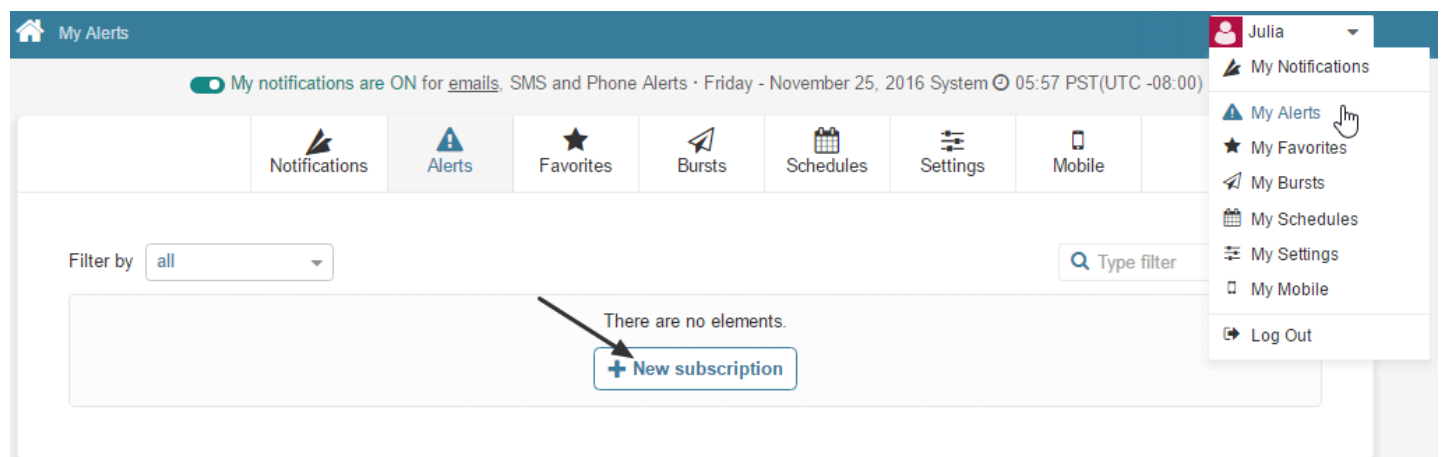
There are 3 main types of alerts, but only Admin and Power Users are allowed to create the last two:

1. **KPI Alerts** are created to show changes occurring in Metrics
2. **Report Alerts** are created to show changes in Reports
3. **Global Alerts** are applied across a broad range of Metrics

Regular Users can create **KPI alerts** on any elements they can view, or from their own *Notifications: Alerts* screen: [Setting up your Alerts using Alert Editor](#)

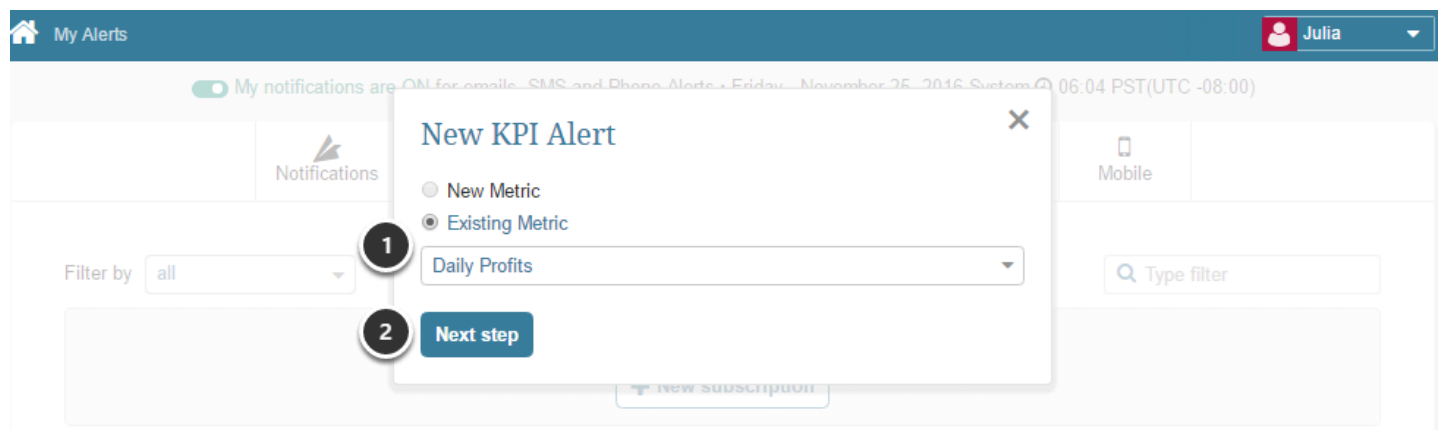
! Alerting was enhanced in Release 5.1 - see the updated articles in Chapter [Alerting in Version 5.1 and beyond](#)

### 1. My Preferences > My Alerts



Click **[+ New subscription]** to begin.

## 1.1. Only valid choice is 'Existing Metric' for regular Users

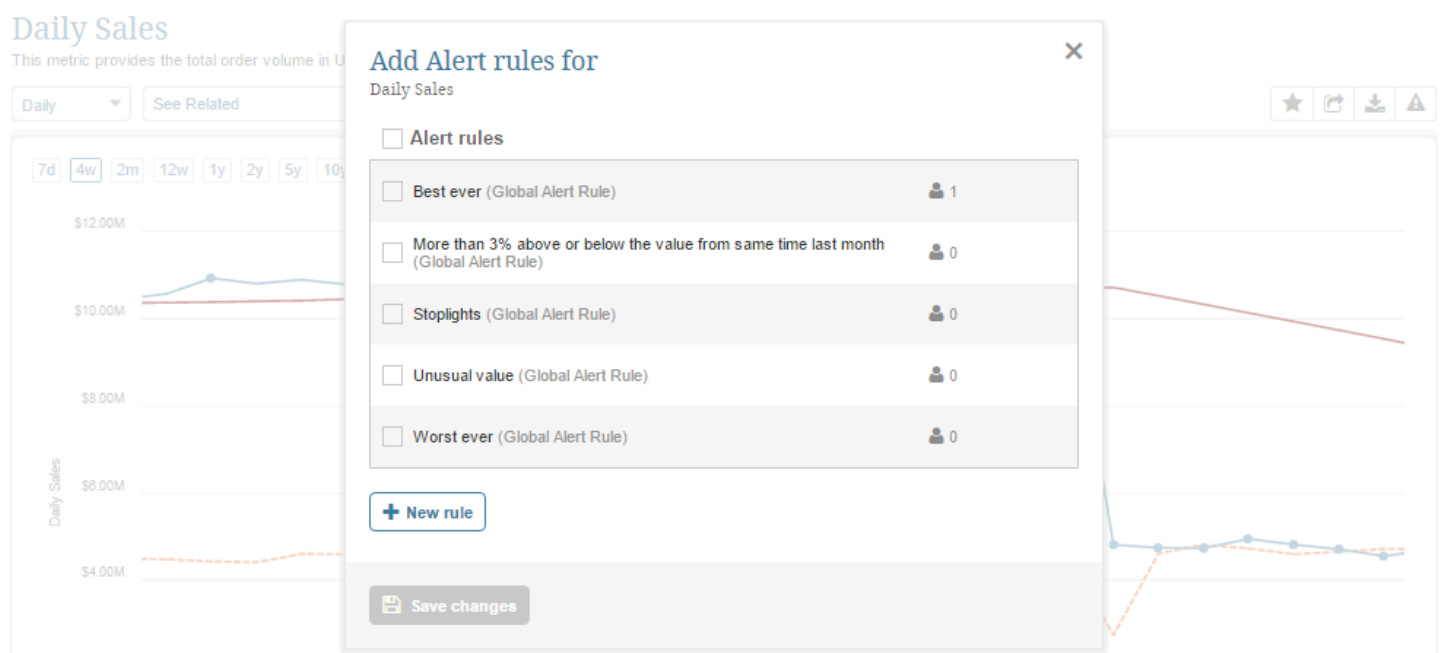


1. Select **Existing Metric** option and select the required Metric from the drop-down list
2. Select **Next step** to access KPI Alert Rule wizard. For more information, see: [Basics for the Alert Wizards - KPI Rules](#)

## 2. From Metric Viewer



## 2.1. Subscribe to any existing Alerts or create a New rule



Select one of the existing rules or click **[+ New rule]** to access KPI Alert Rule wizard. See more at [Basics for the Alert Wizards - KPI Rules](#)

## 3. From Alert icon on any Report

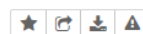
- ⚠ **Note:** The Report Alert concept has been improved by Dataset Reporting in Version 5.4. The Alert icon will be removed from Report Viewer in Metric Insights 6.



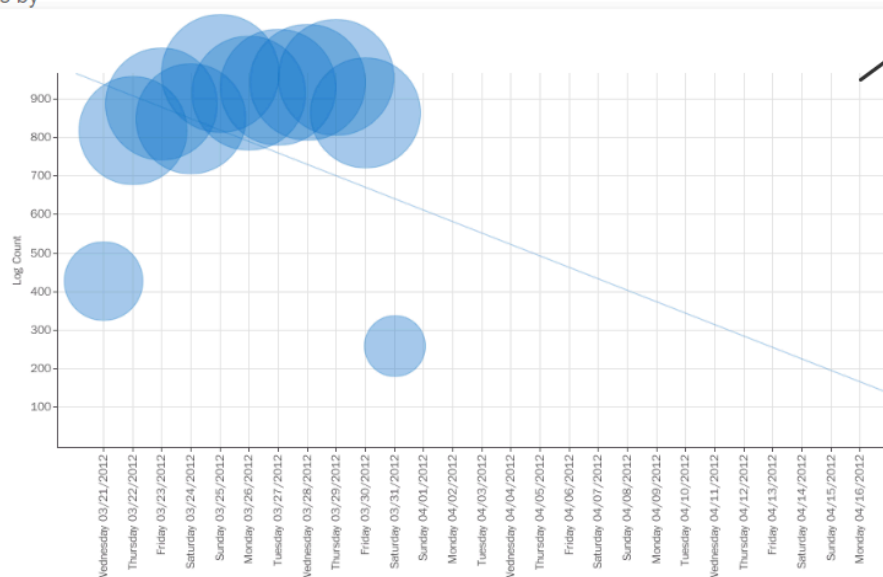
## Daily Web Log Entries Sample

Daily Web Log Entries Sample Treasure Data Report

See Related



Web Log Entries by



## 4. Basics of KPI Alerts

### KPI Alert Rule type



- ☒ Fixed value
- ☐ Prior value
- ☐ Average of prior values
- ☐ Recent volatility levels
- ☐ Combination of multiple Alerts

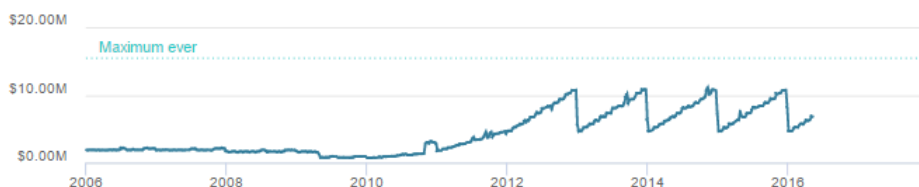
#### Fixed Value

This will compare the latest measurement value to a specific threshold that you set.

1

2

Who can subscribe to this Alert Rule ☒ Public (users with access to this Metric) | ☐ Private (only you)



3

type criteria method content

Next: Alert criteria

1. Select the type of comparison you wish to create. To make a right decision you can consult with the hint description to the right
2. Determine if you want to share your alert or keep it private

3. Wizard will guide you through the steps required to complete the Alert

For more details, see: [Basics for the Alert Wizards - KPI Rules](#)