Jump Start Guide for Regular Users

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1. Login to Metric Insights

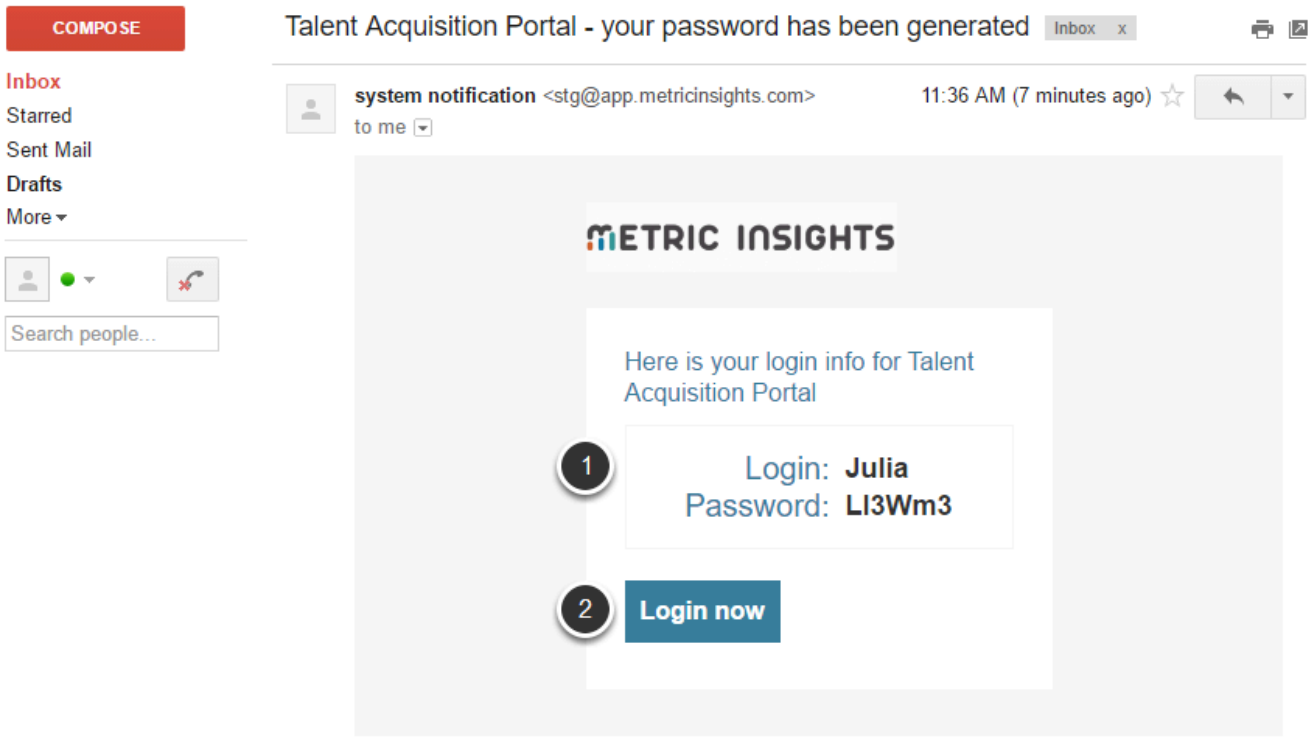
1.1 First Login Options

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:

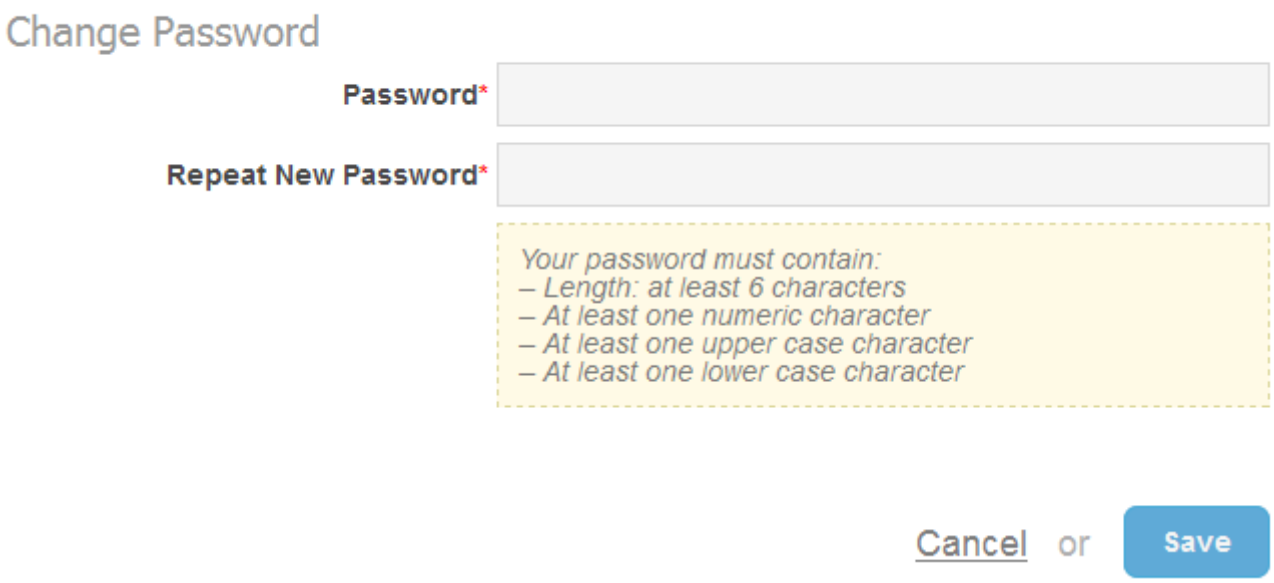
1. Login using a system-generated Email



- 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

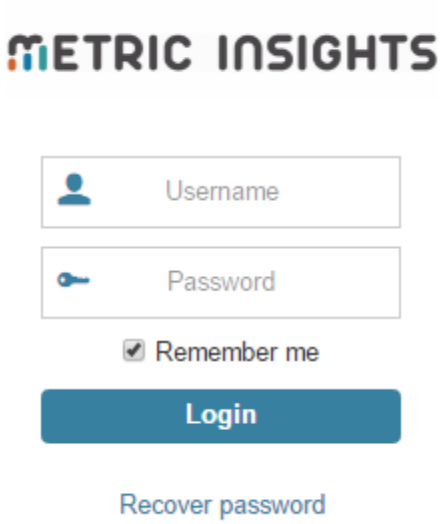
NOTE: You are most likely going to be asked to change your password after the first login.

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



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

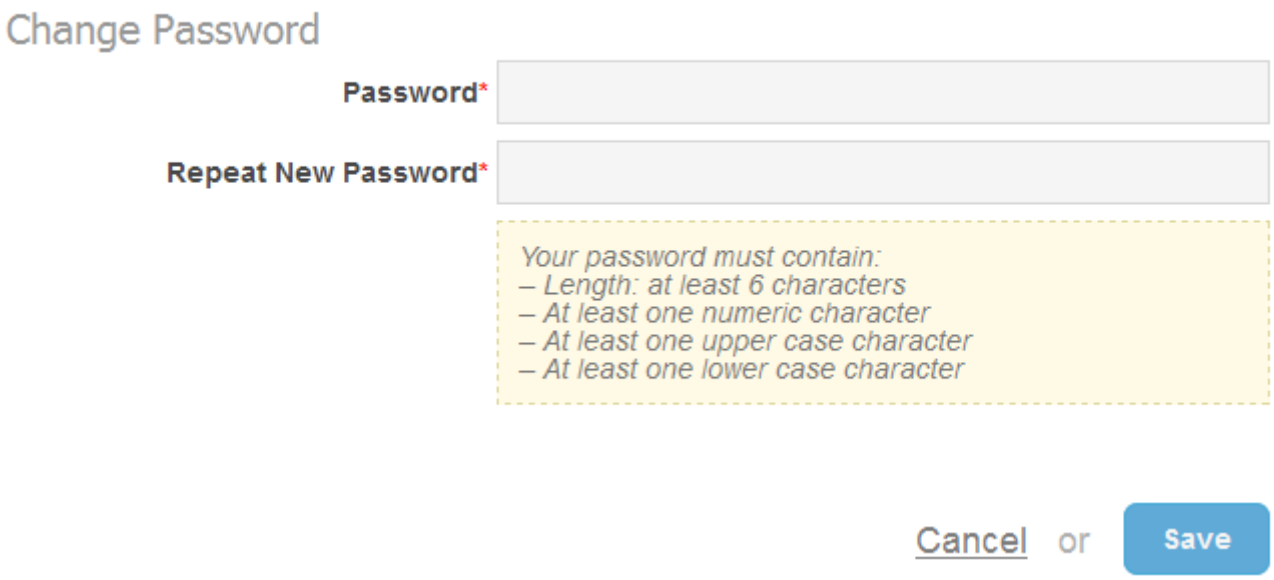
2. Login using information from Administrator



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



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.

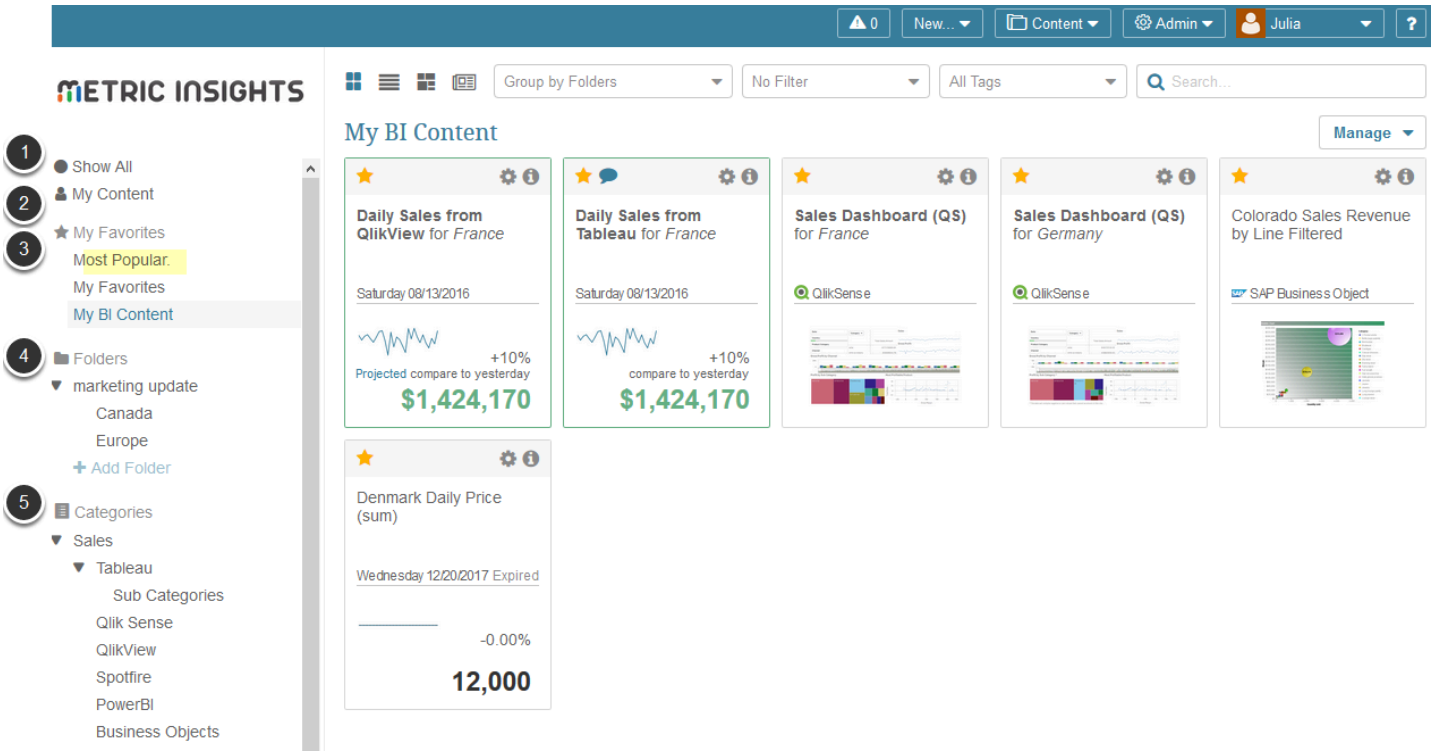
The *Homepage* is arranged in two blocks, the **Left Sidebar,** and the **Main Panel**. The *Homepage* only contains those elements and Dimension Values that you have Permission to access.

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



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**.

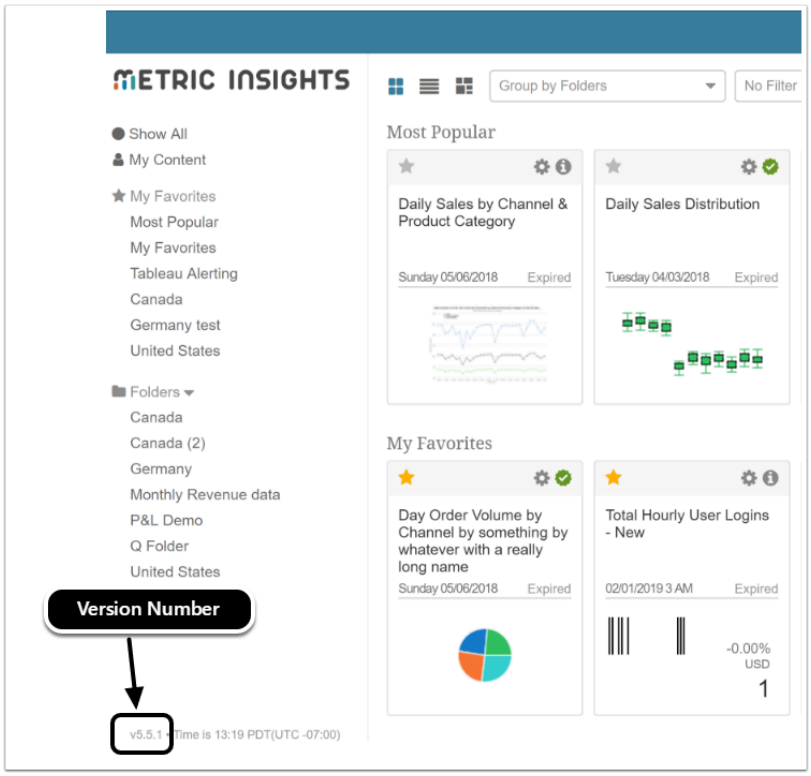
   The amount of days to consider while scoring the "Most Popular" folder can be defined at *Admin* > *Utilities* > *Config Variables* > **MOST_POPULAR_FOLDER_VIEW_DAYS**.

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.

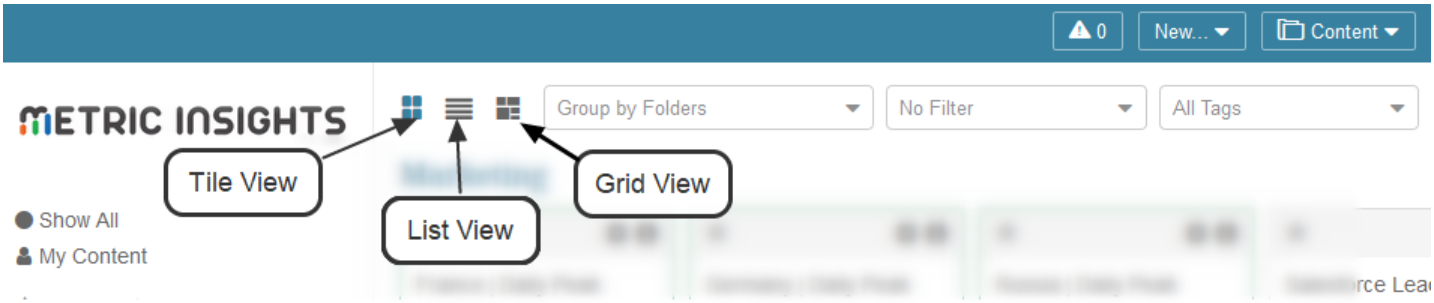
> [5.2.1] Allows Users to omit the Category section from their Homepage to reduce clutter, if desired. This option is set in the My Settings section for each individual User. See My Settings (aka 'Preferences')

2. Where is my version number?

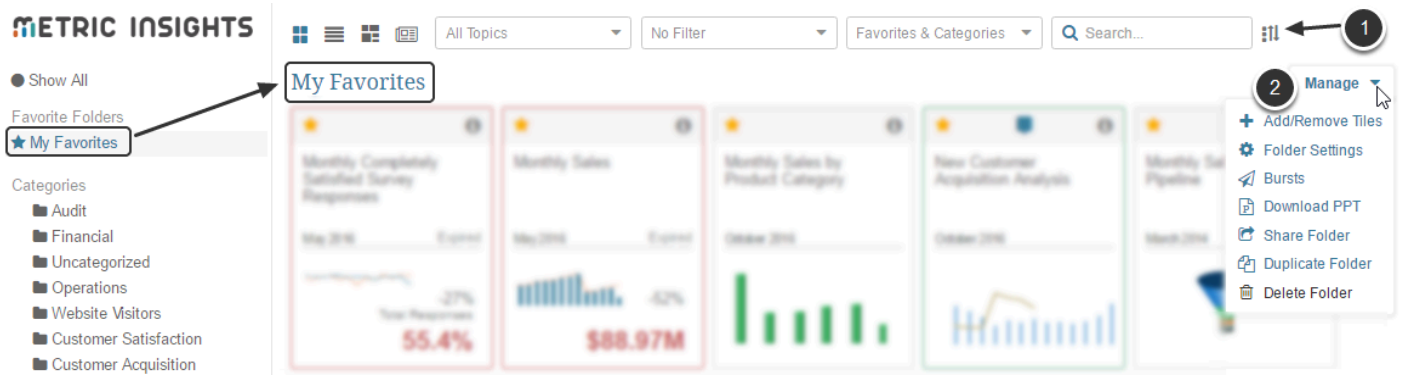


3. Main Panel View Modes

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



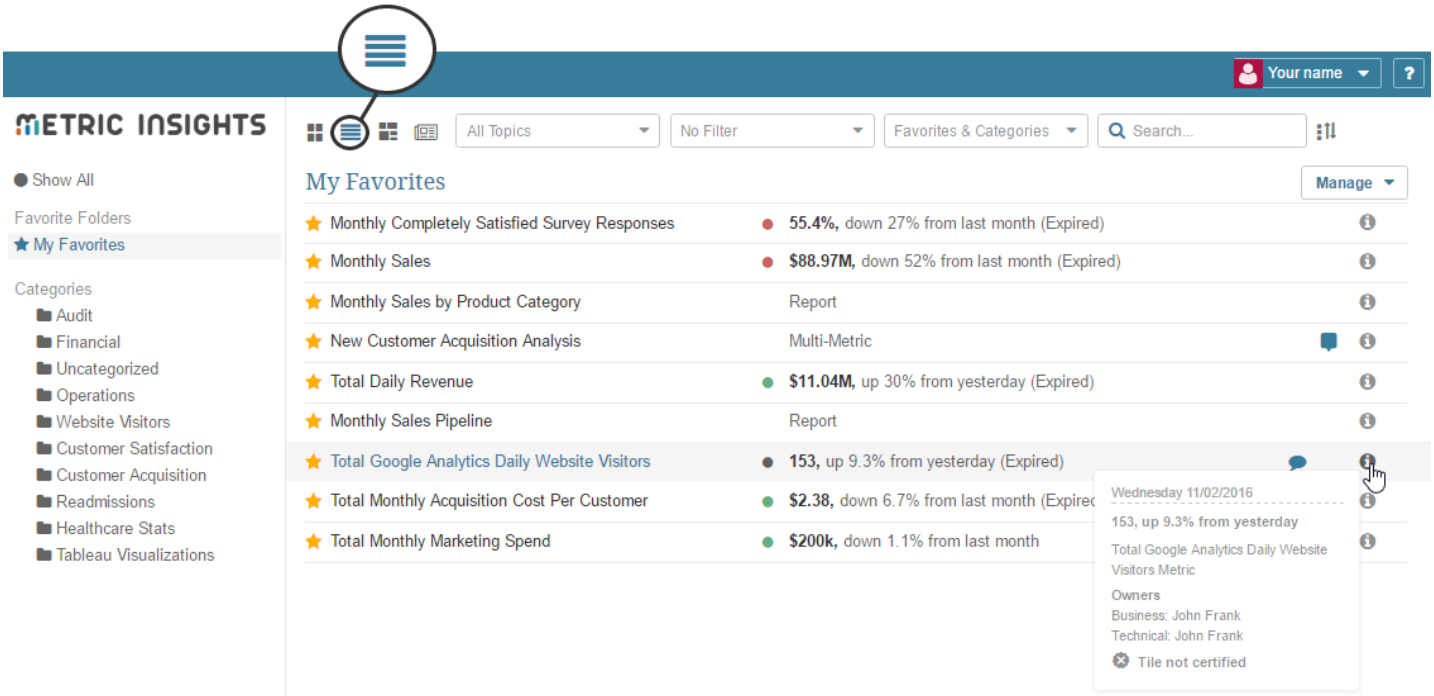
3.1. [Tile View] thumbnail images, current values, and icons for various collaborative items



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

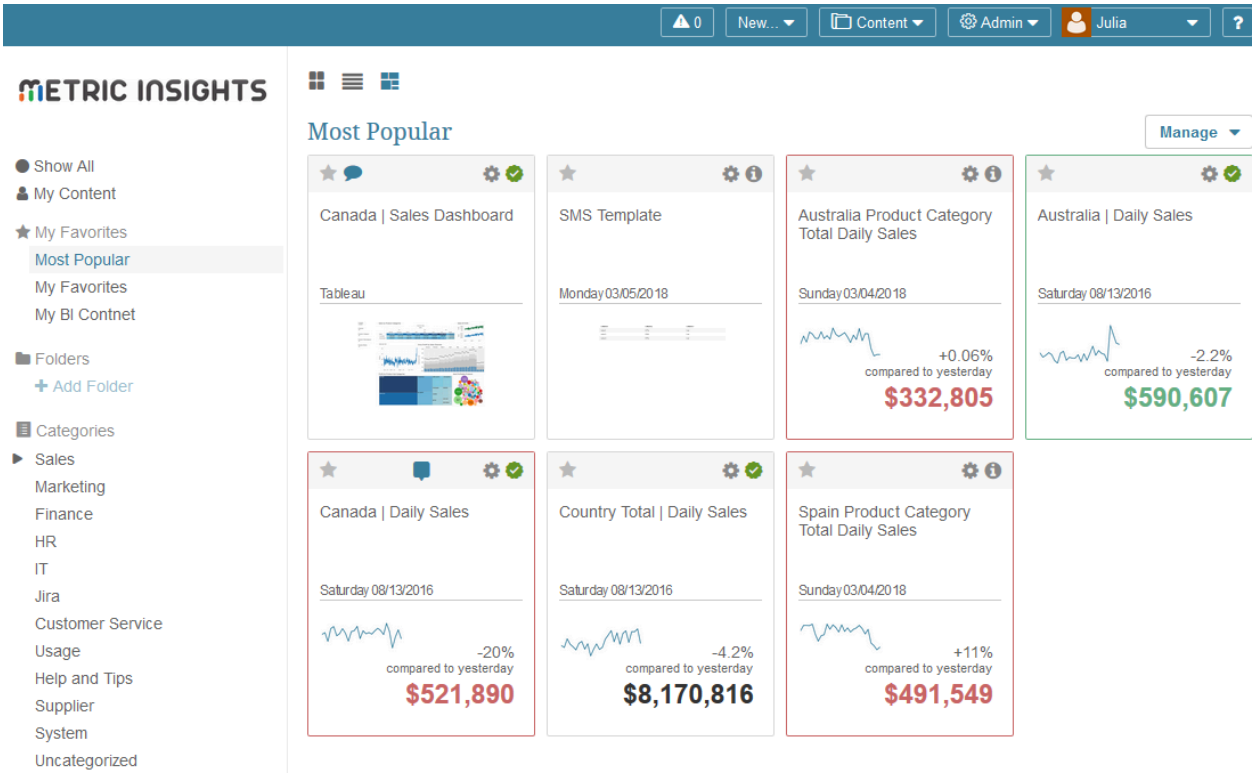
1. Click this icon to **Re-order elements**
2. **Manage** Favorites allows you to change Favorite options without leaving the *Homepage*

3.2. [List View] scroll through current values, Alerts, and updates



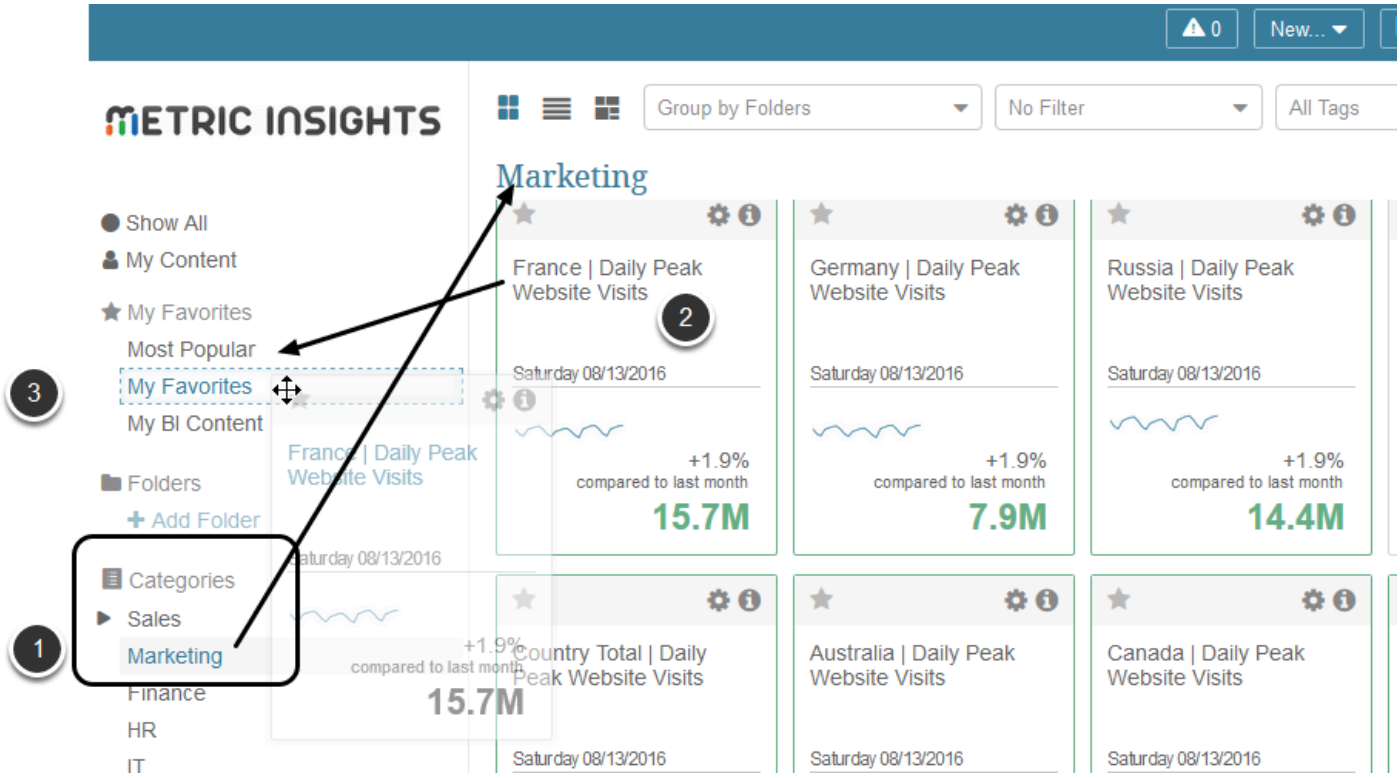
A tabular view of your elements that allows you to quickly scroll through current values, Alerts, and changes.

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



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



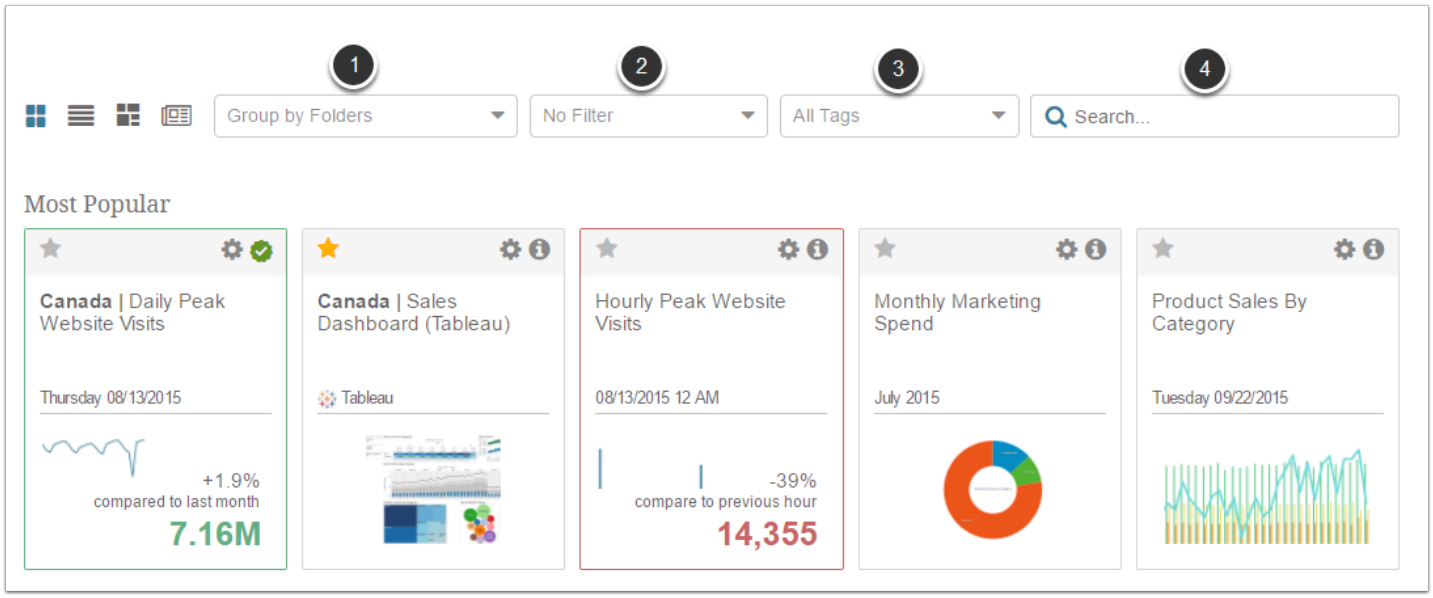
In image above, we are copying a tile from the Marketing Category to My Favorite Folder.

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.

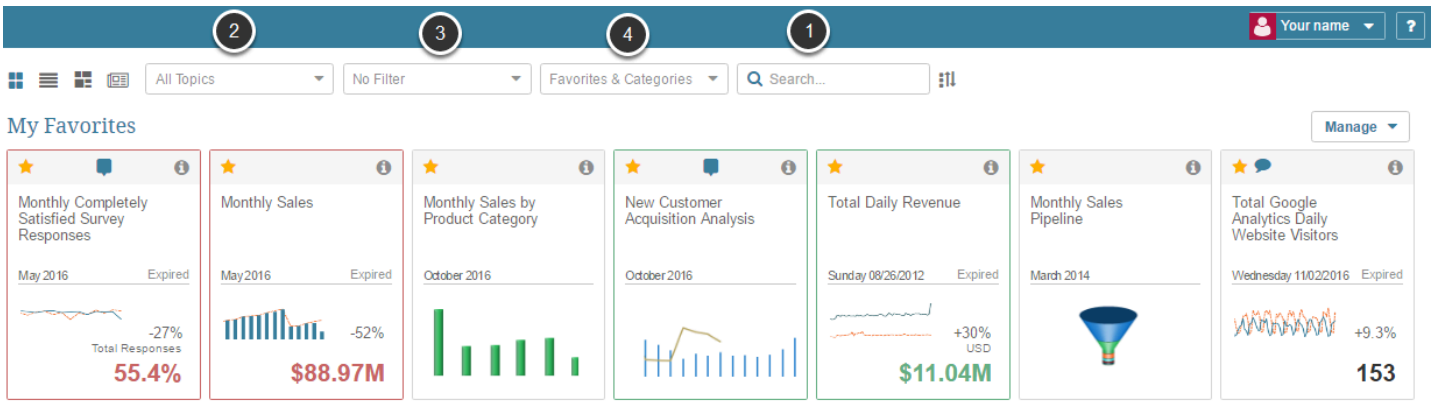
4. Basic Homepage Filter Options

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]

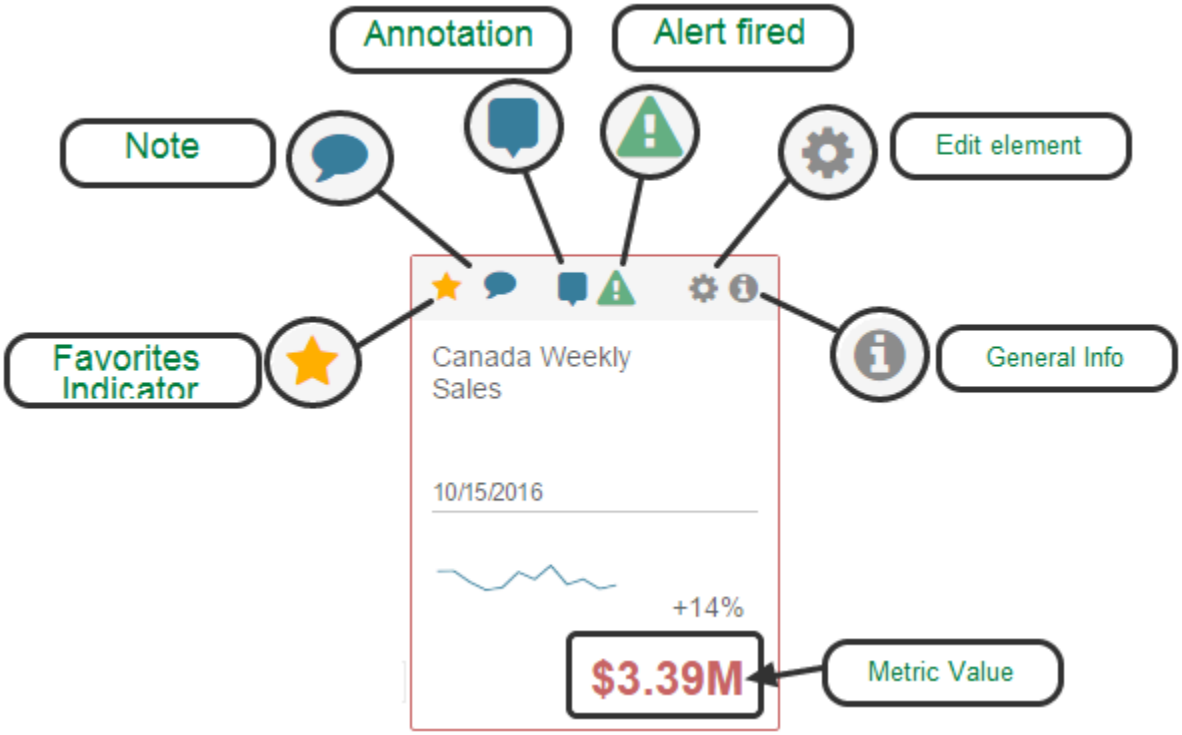


1. Highest Level filter is **Search** by name or element description.

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"

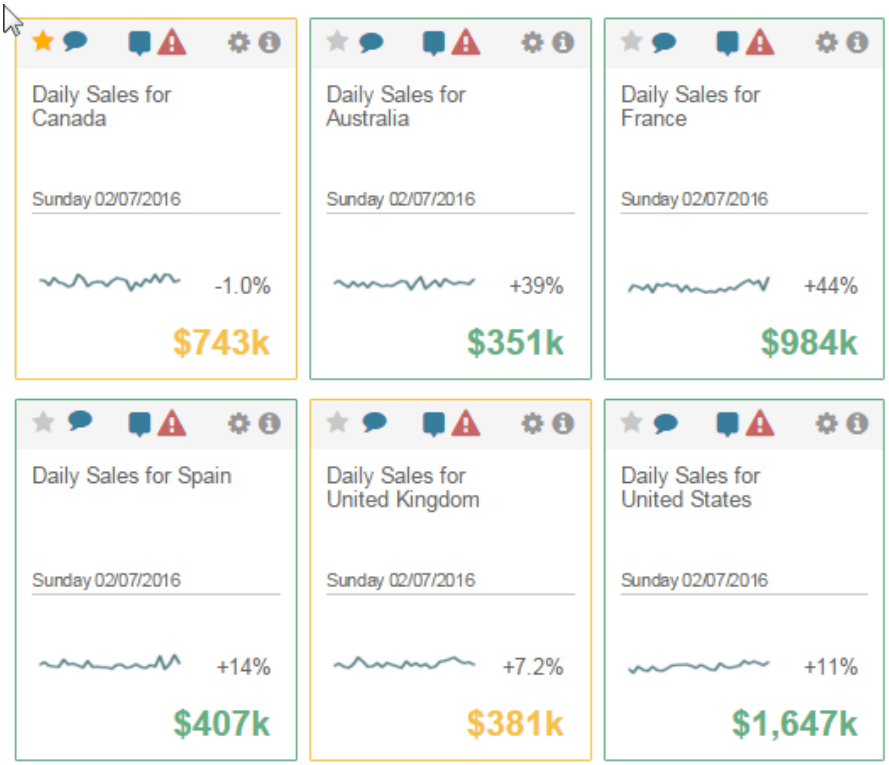
5.2. A Multi-Metric Tile

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.

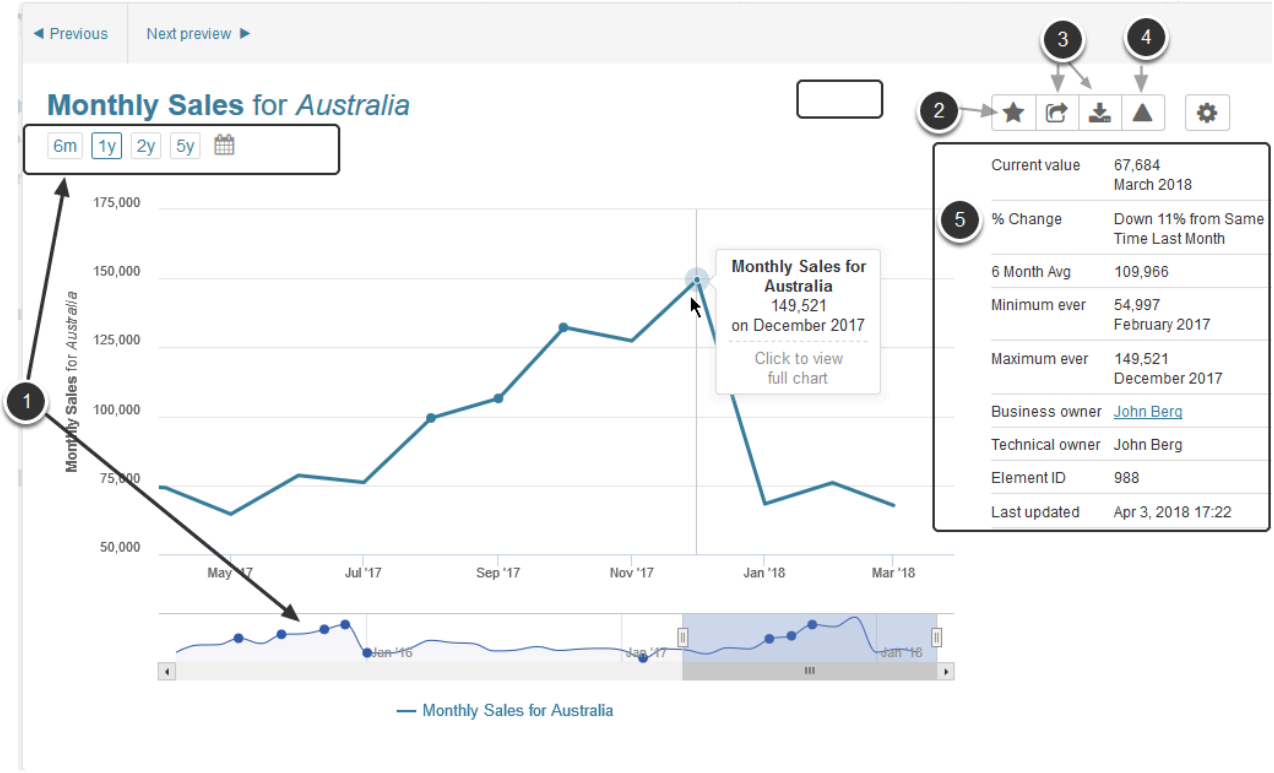
5.4. Dimensioned Element's Tiles



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.

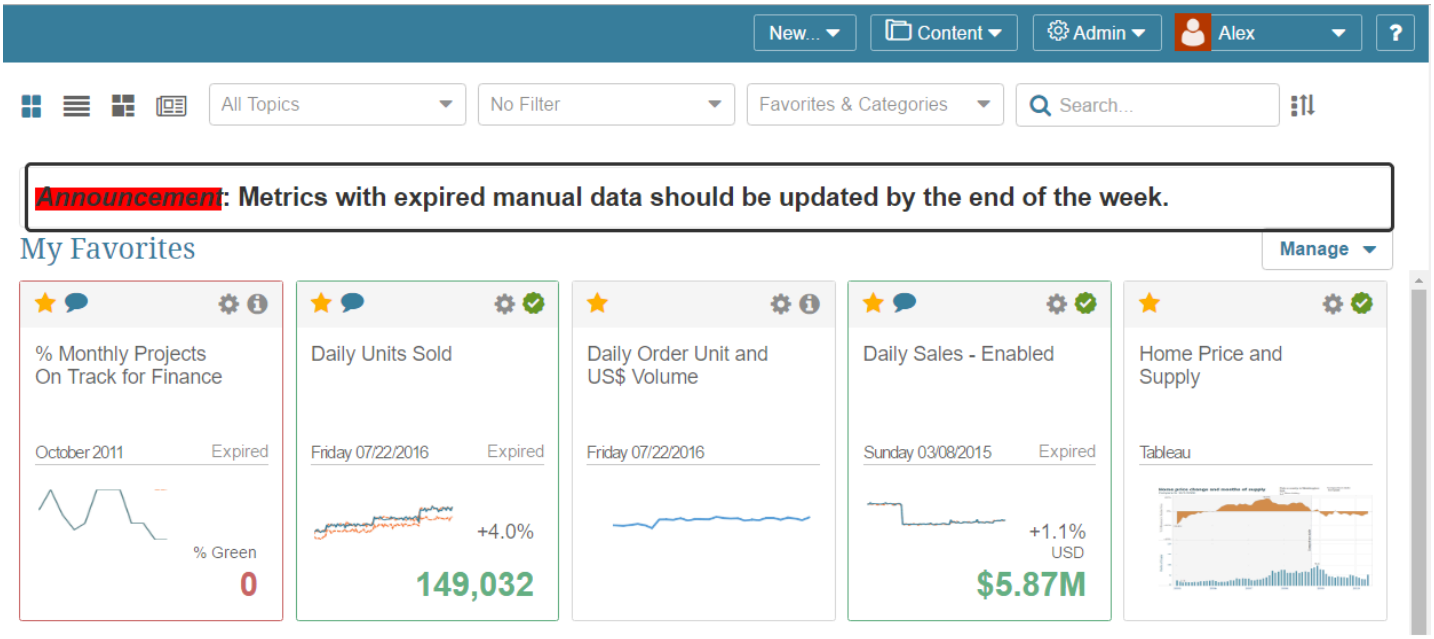
6. Anatomy of Preview (Metric example)



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

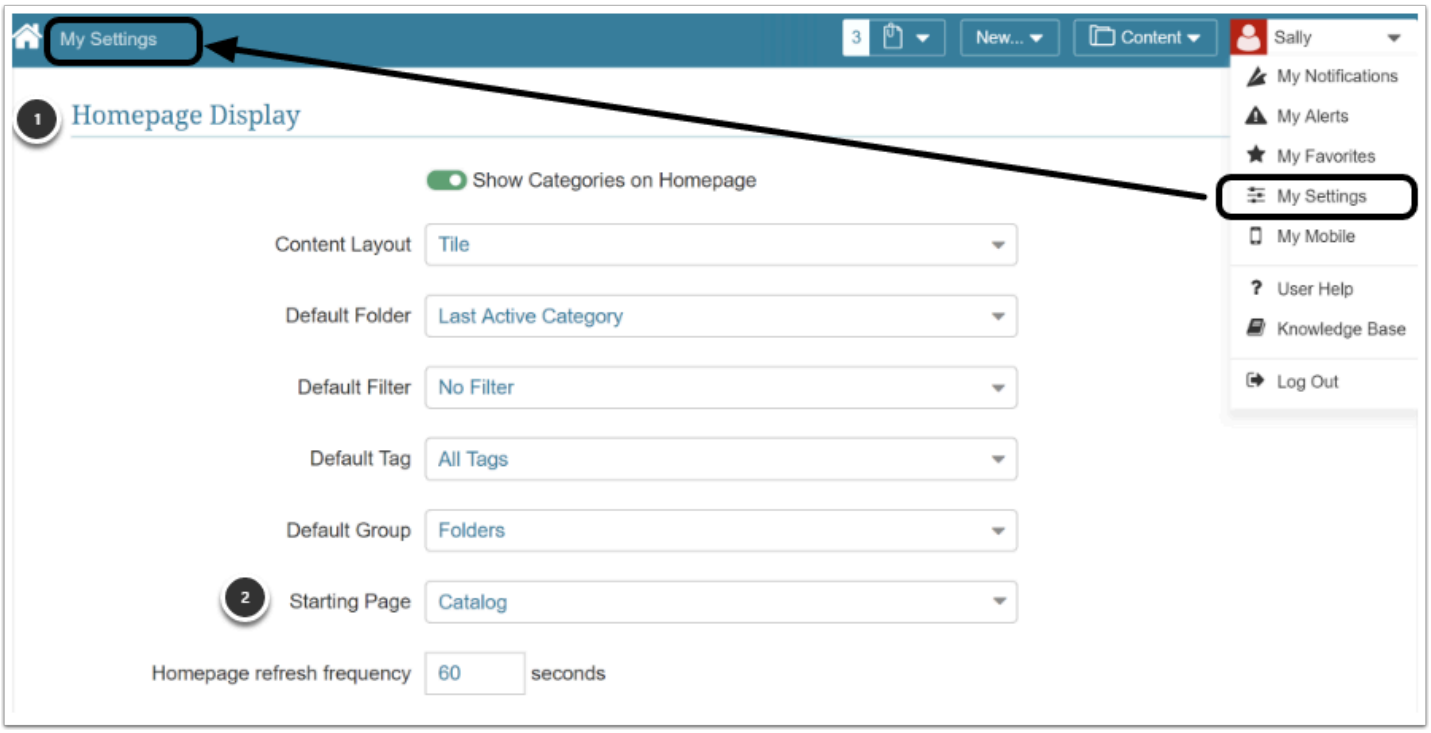


To learn how to add a message displayed either for everyone or for a specific group of users (Admins, Power Users or Regular Users) at the top of the *Homepage*, see Creating a Homepage Message

[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

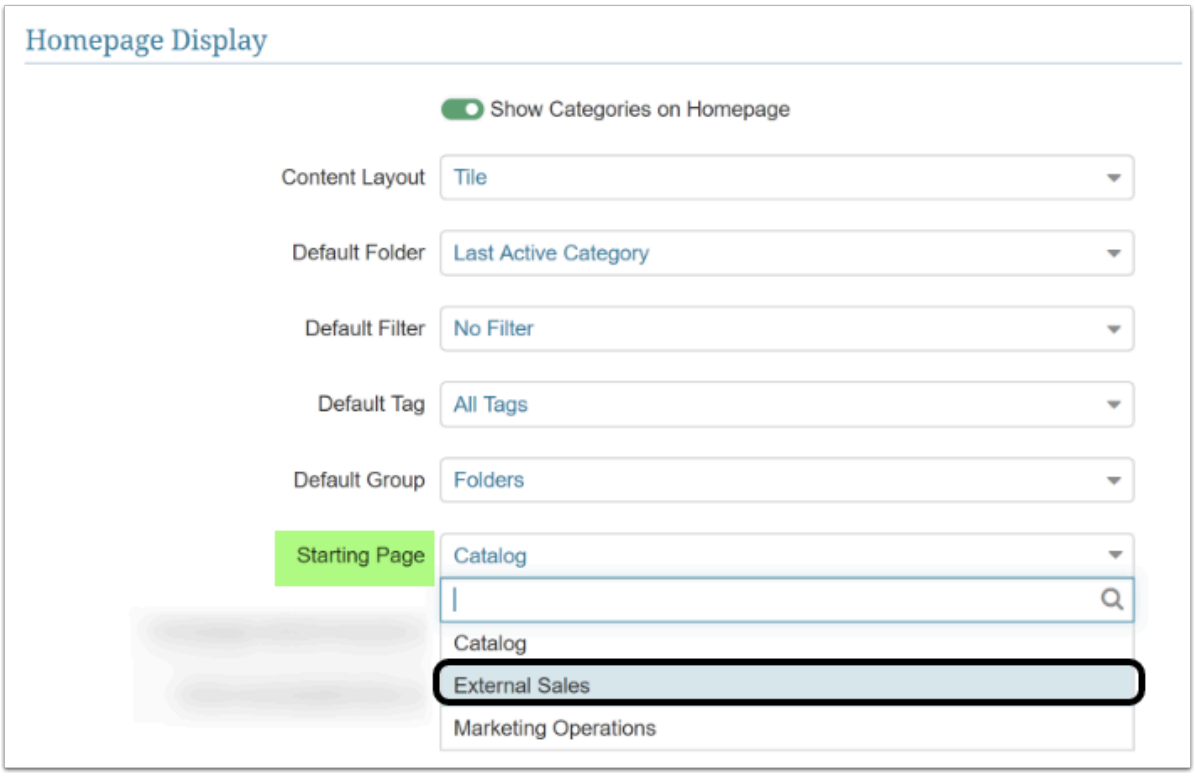
2.2 Setting a Portal Page as your Start Location

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



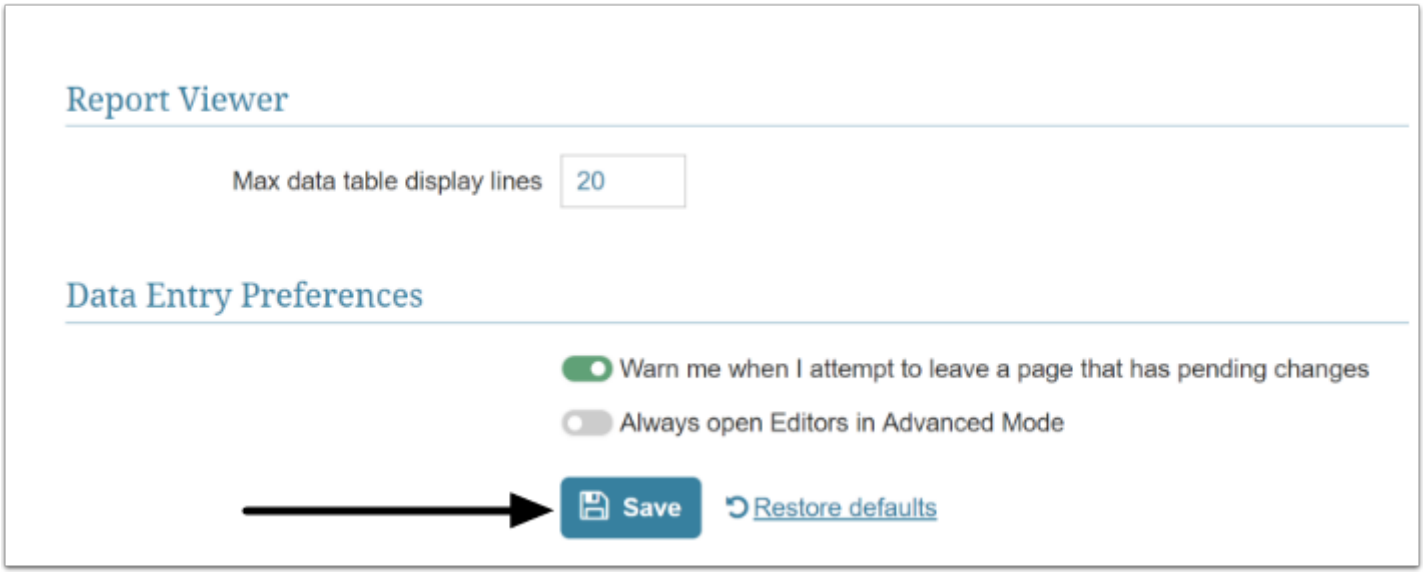
1. Scroll to the **Homepage Display** section
2. **Starting Page** is set to *"Catalog"* by default

2. Open drop-down and select a Portal Page



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

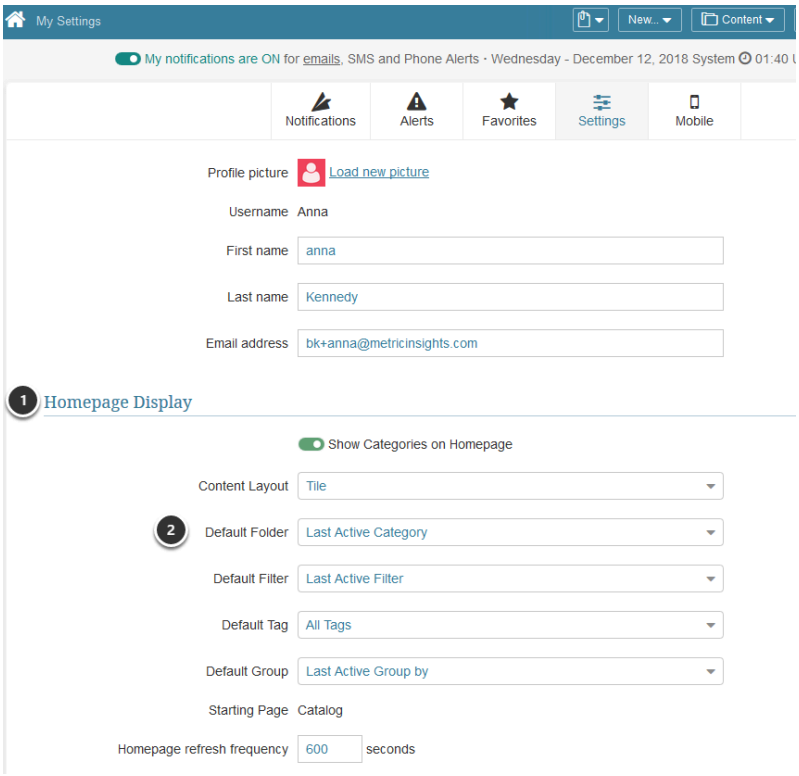
3. Scroll to bottom and Save your changes



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*.

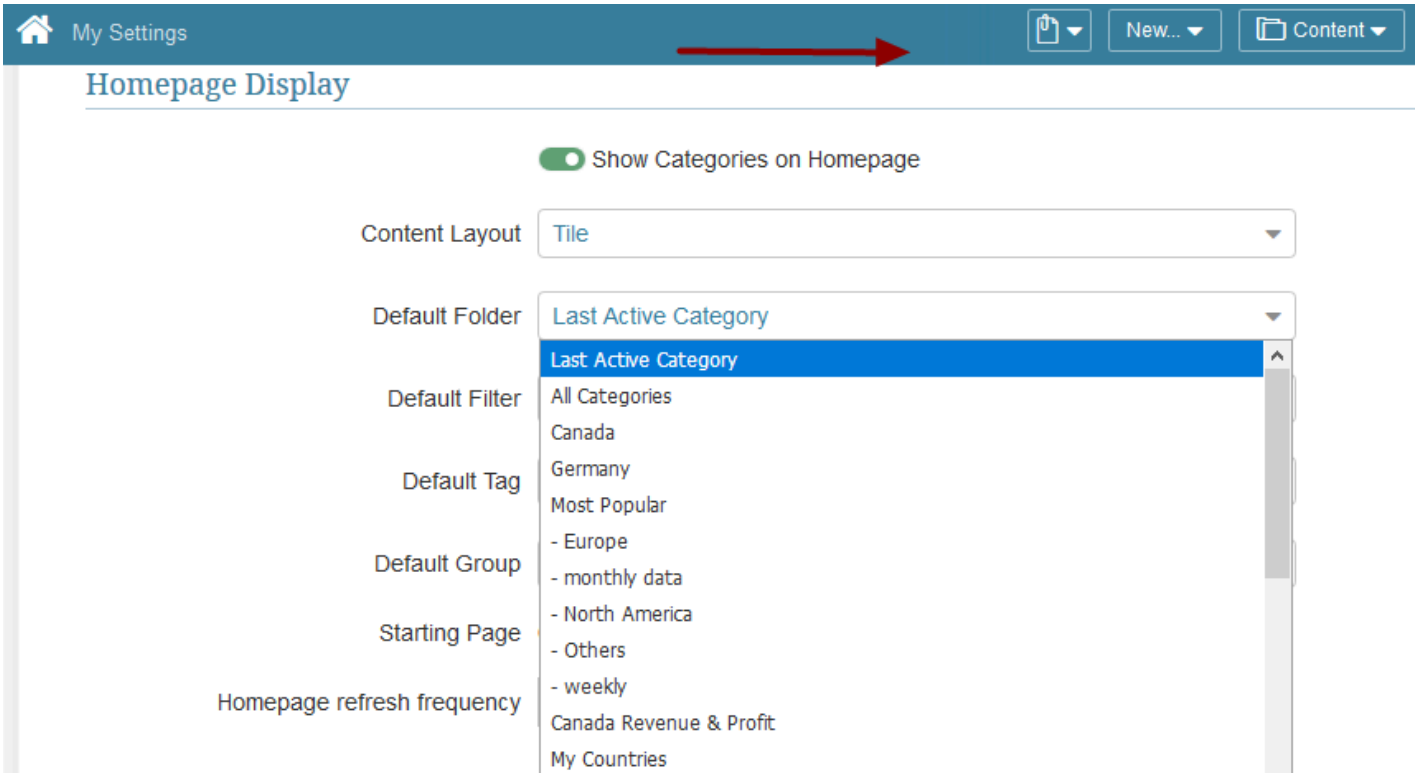
Access "My Settings" in the menu under your Username



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



2.4 Homepage search: how it works

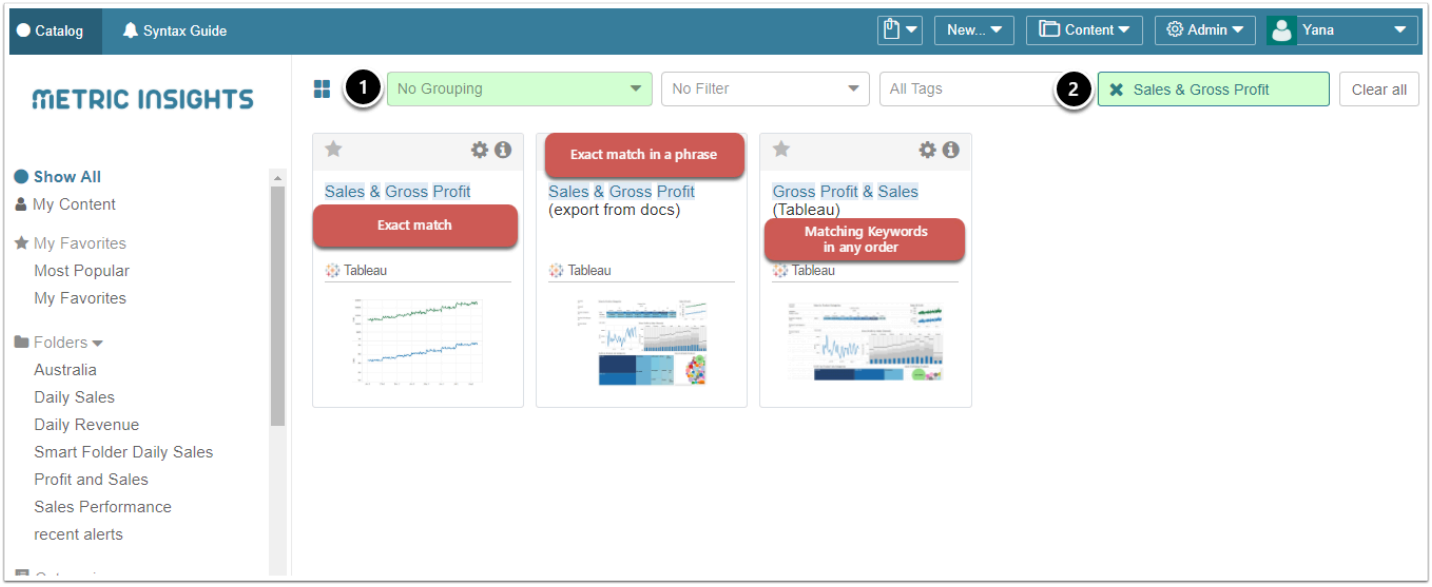
On the Homepage, Users can search and find elements by:

- **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**

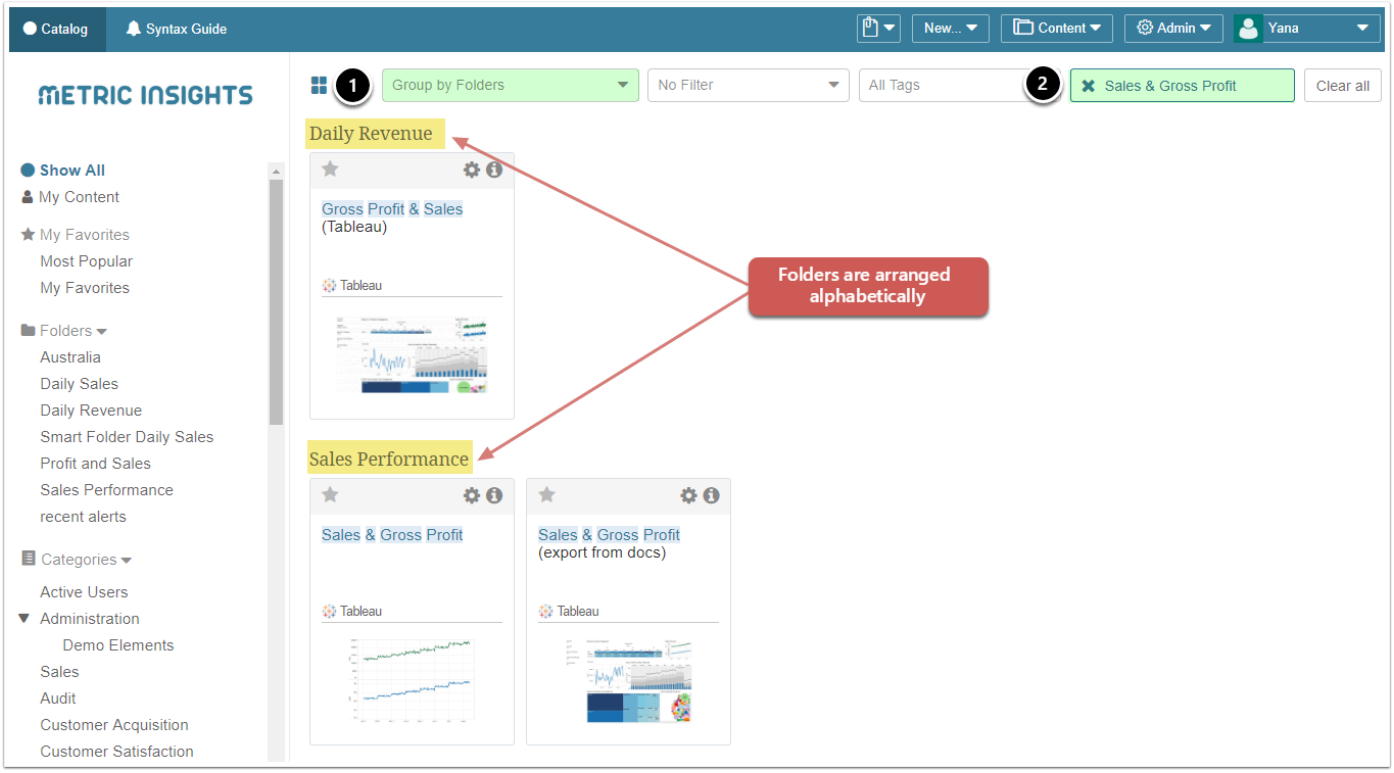
Search by Relevance (Folder Grouping example)

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.

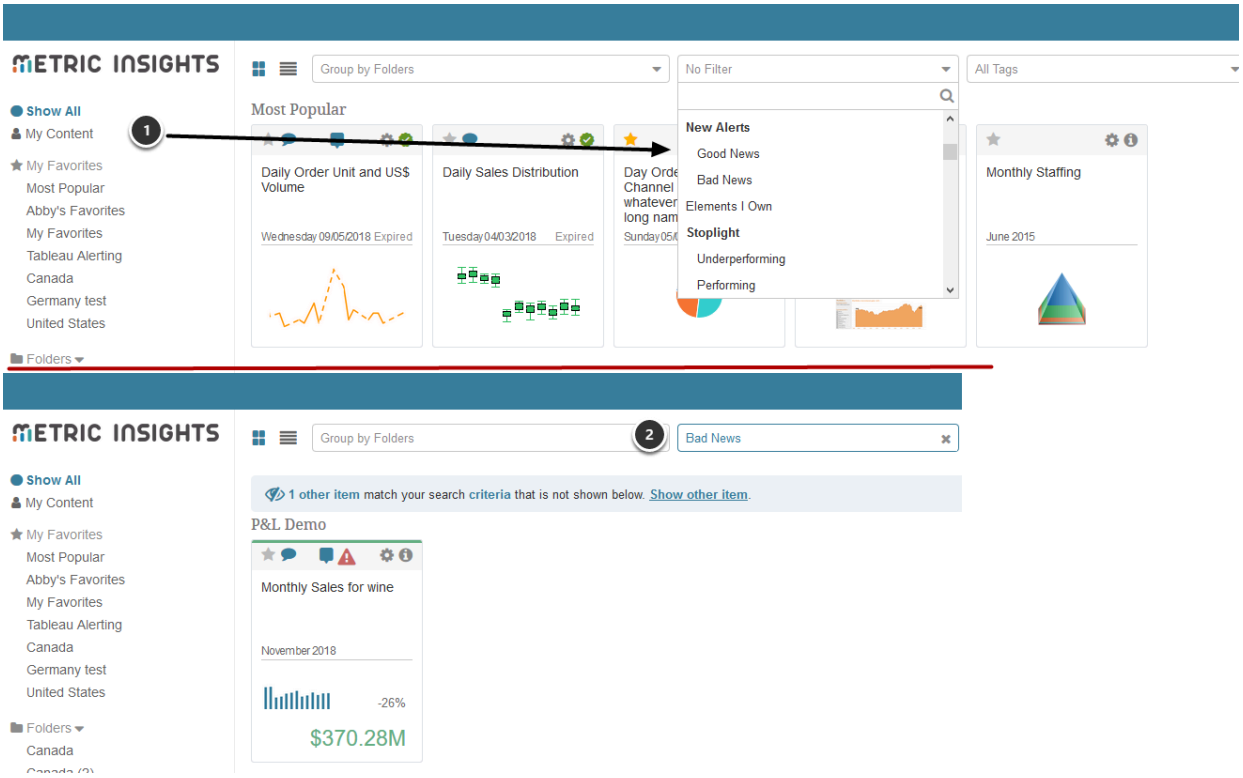


1. **Group by Folders:** if activated, display priority is first given to Folders (arranged alphabetically) and then to search relevance
2. Enter your **search phrase**

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



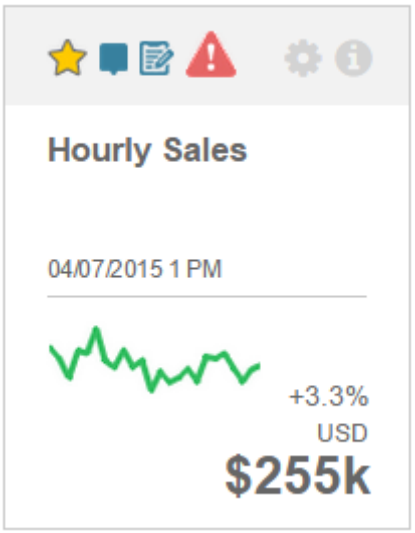
1. Below **New Alerts**, select either "Good News" or "Bad News"
2. After selecting "Bad News", only the tile for the "Montlhy Sales for wine " displays

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

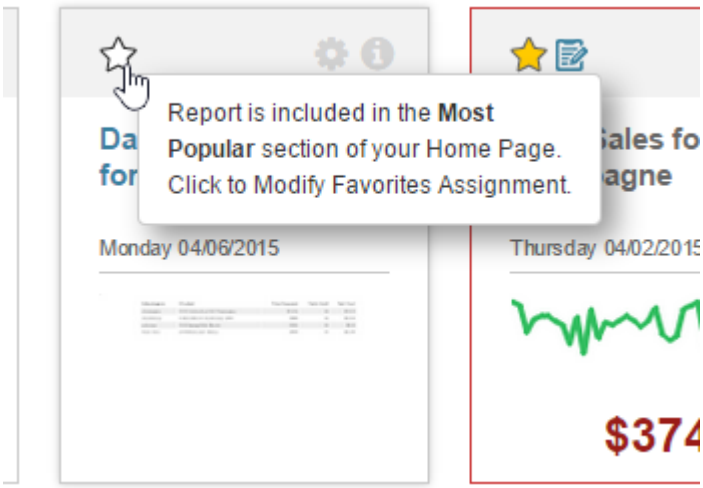
The tile images on your Home Page display various icons to notify you of recent changes and additions to your data. Hovering over these icons display additional information.

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



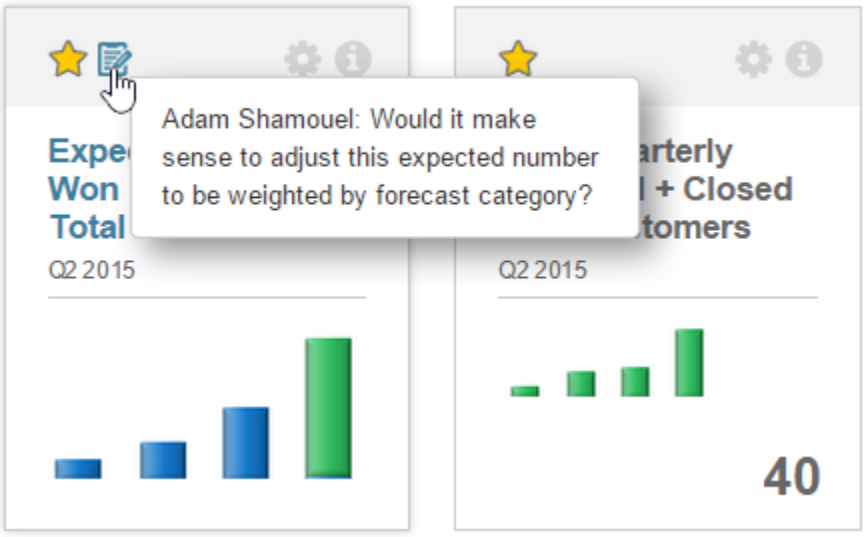
Gold star icon indicating a Favorite element



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

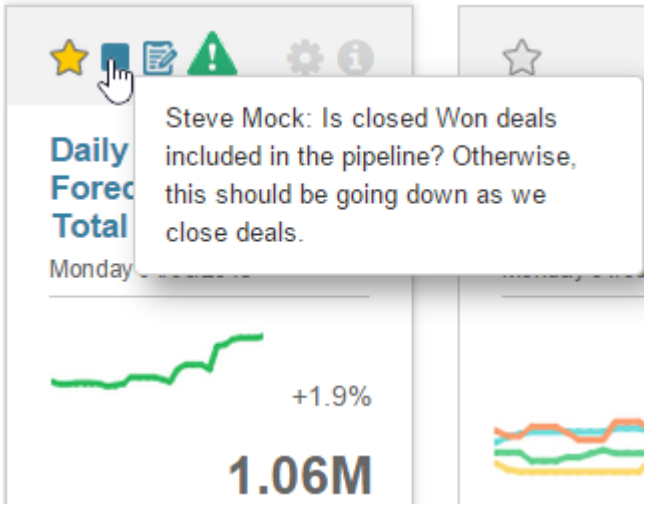
Exception: The 5 most viewed elements are automatically added to 'Most Popular' folder and Users cannot alter or remove these

Notes and Commentary icons



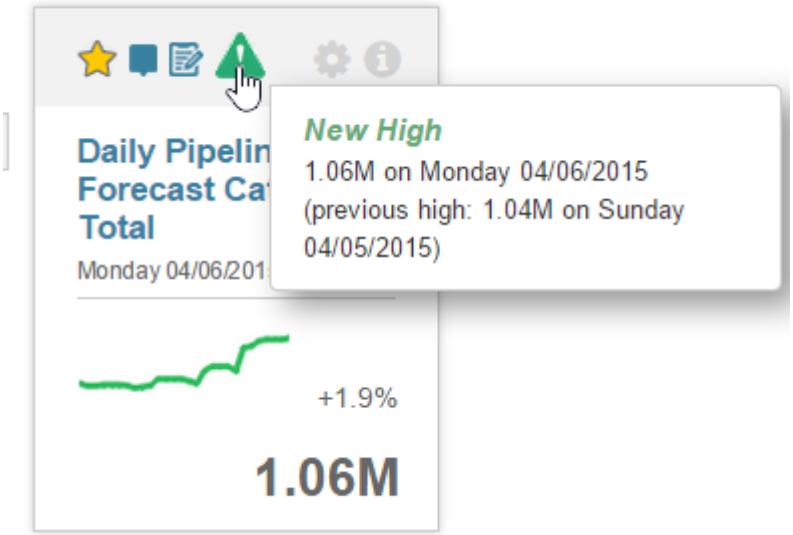
The most recent **note** is displayed, unless you wrote the most recent one, for as long as the associated data point(s) displays in the chart measurement interval. The most recent **Expert Commentary** will display on hover-over, unless you wrote it, until it is deleted.

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 Viewe*r and *Collaborative View*, but the icon will be removed from the Tile View

Alert icon

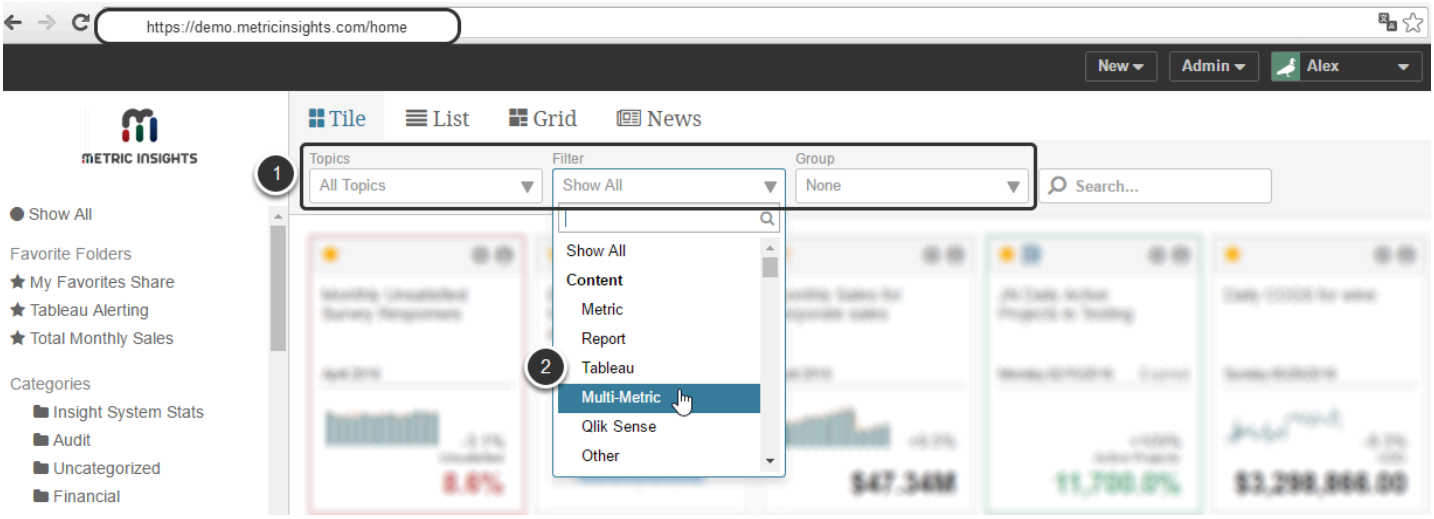


The most recent **alert** will display on hover-over. After you view this alert detail via this hover-over or by viewing the element, the icon will be removed from the *Tile View*: the icon will remain on the *Element Viewe*r and *Collaborative View*,

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)



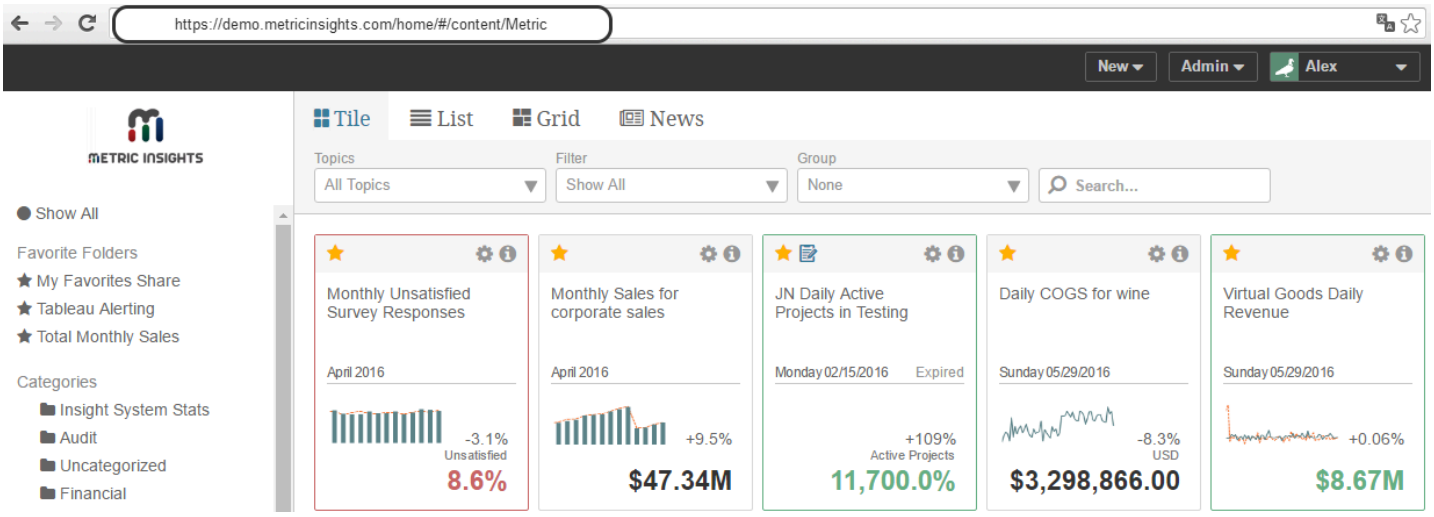
1. You may limit the tile display at the *Homepage* by configuring page filters in **Category**, **Topic**, **Filter by** and **Group by** drop-down lists.
2. In this example, we filter the content to only show Multi-Metrics for all Topics and no specific Groups

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:

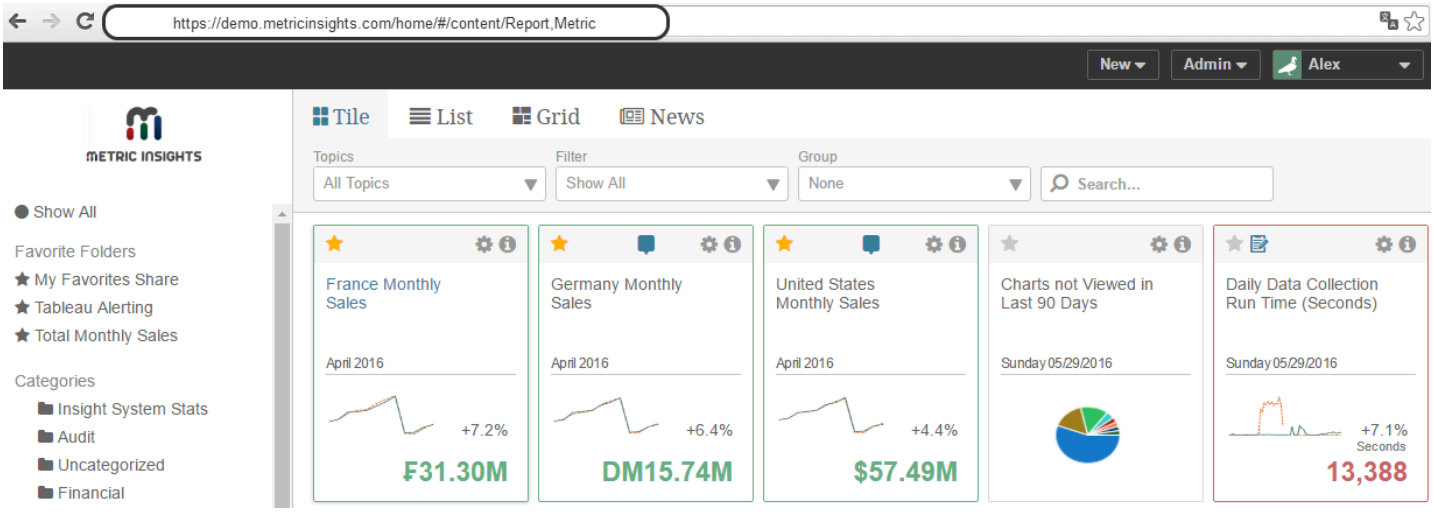
```
https://yourMetricInsightsInstance.com/home/#/content/ElementType
```

- **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



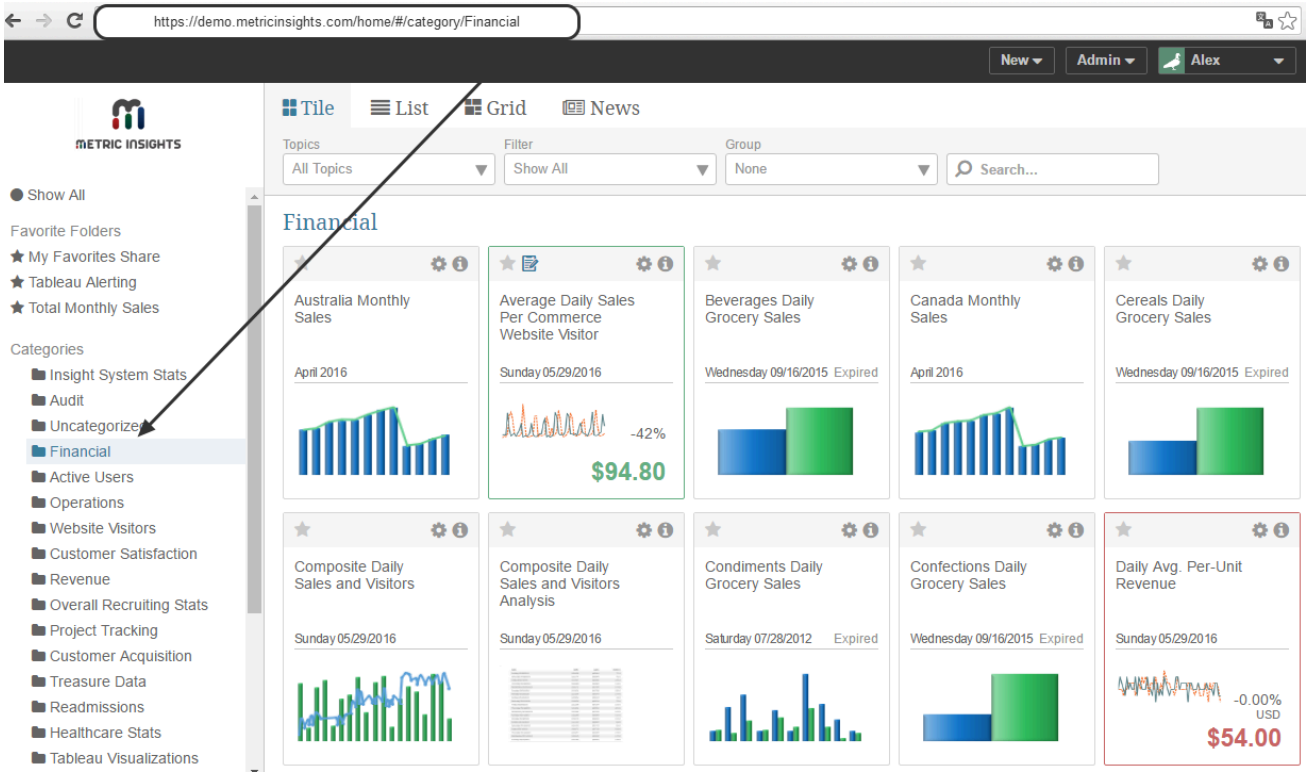
Required URL parameters are:

```
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:

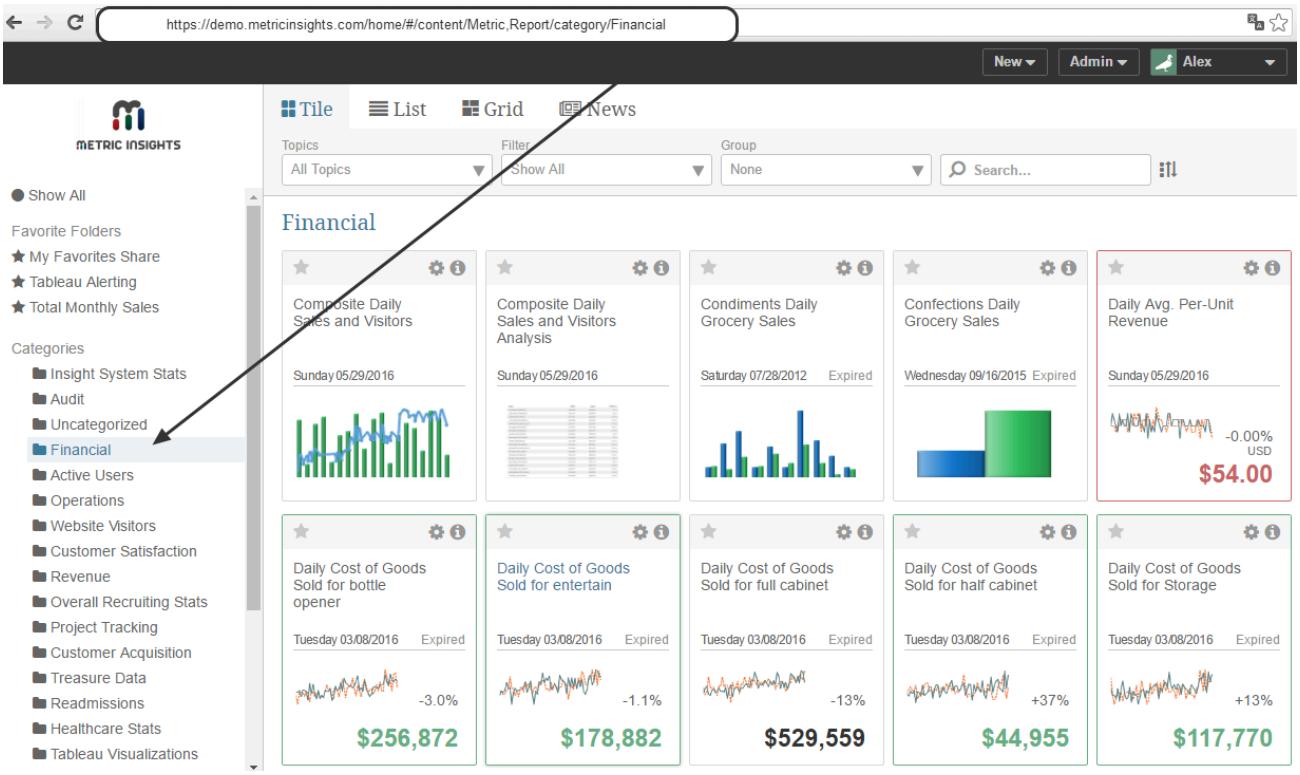
```
https://demo.metricinsights.com/home/#/category/Financial
```

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
```

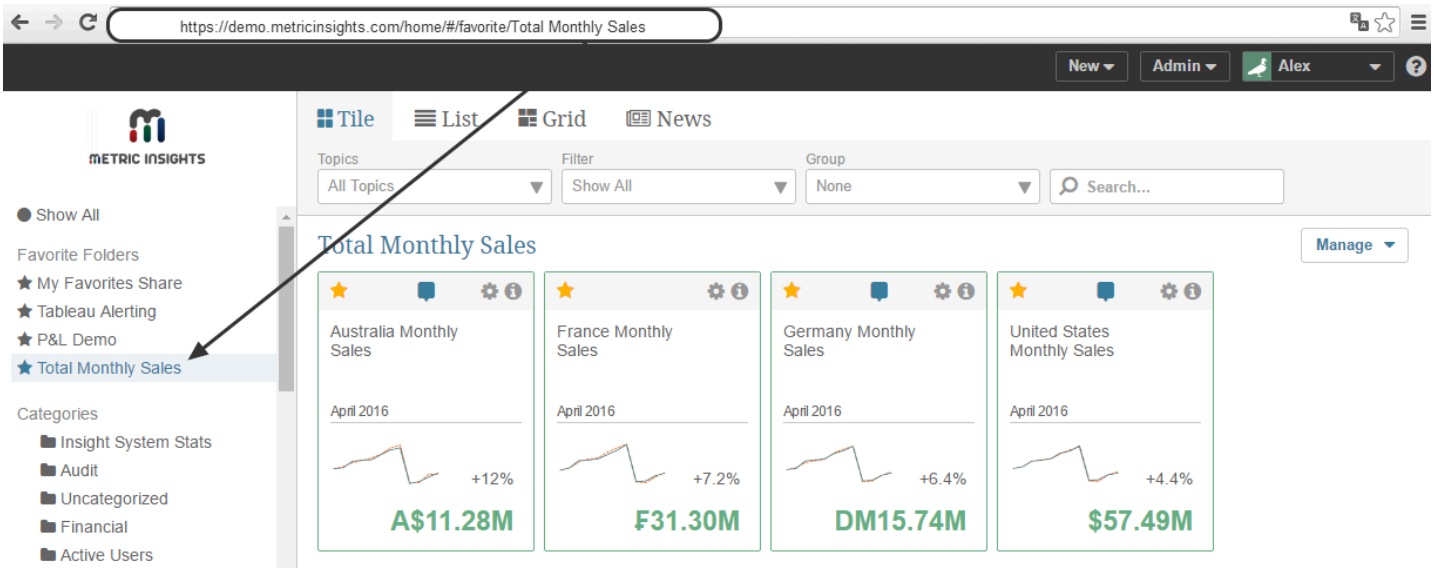
OR

```
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



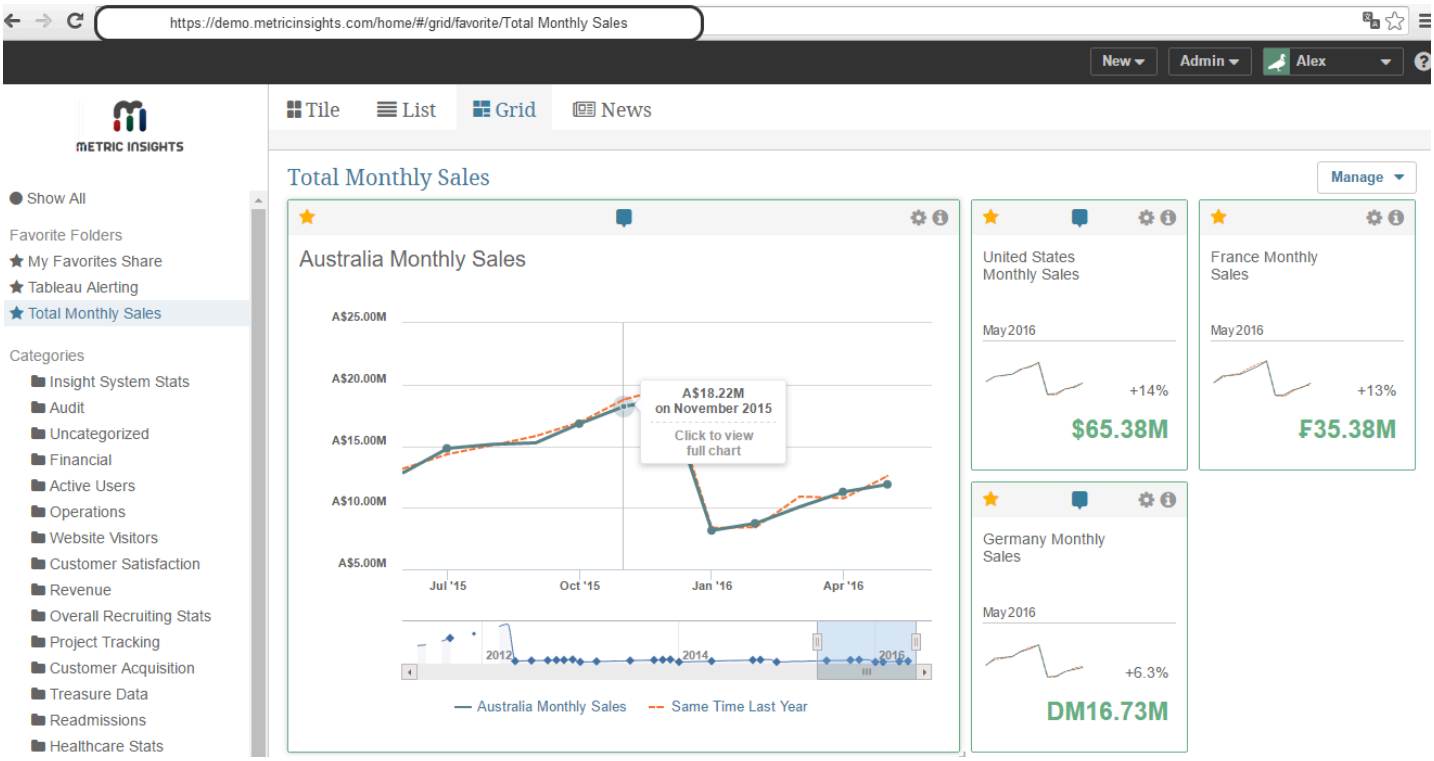
Required URL parameters are:

```
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



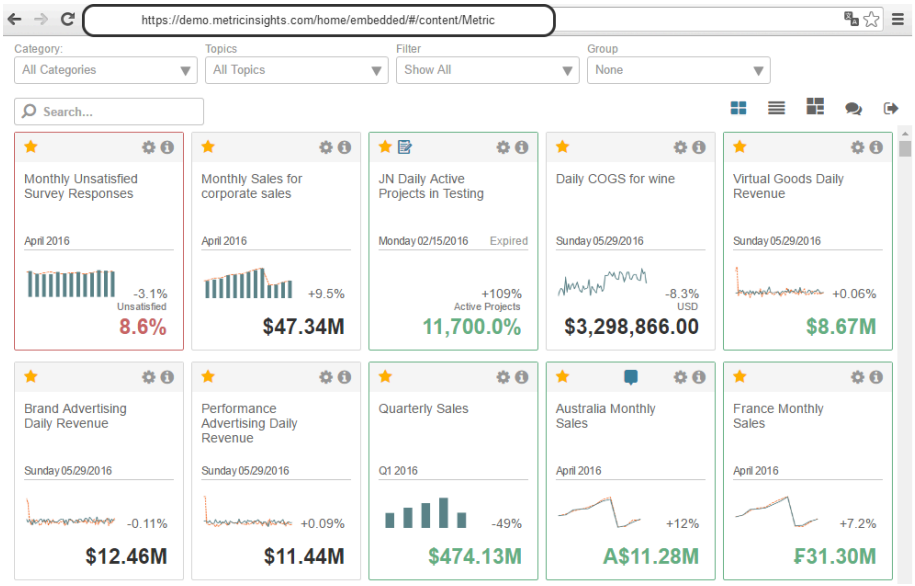
Required URL parameters are:

```
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
```

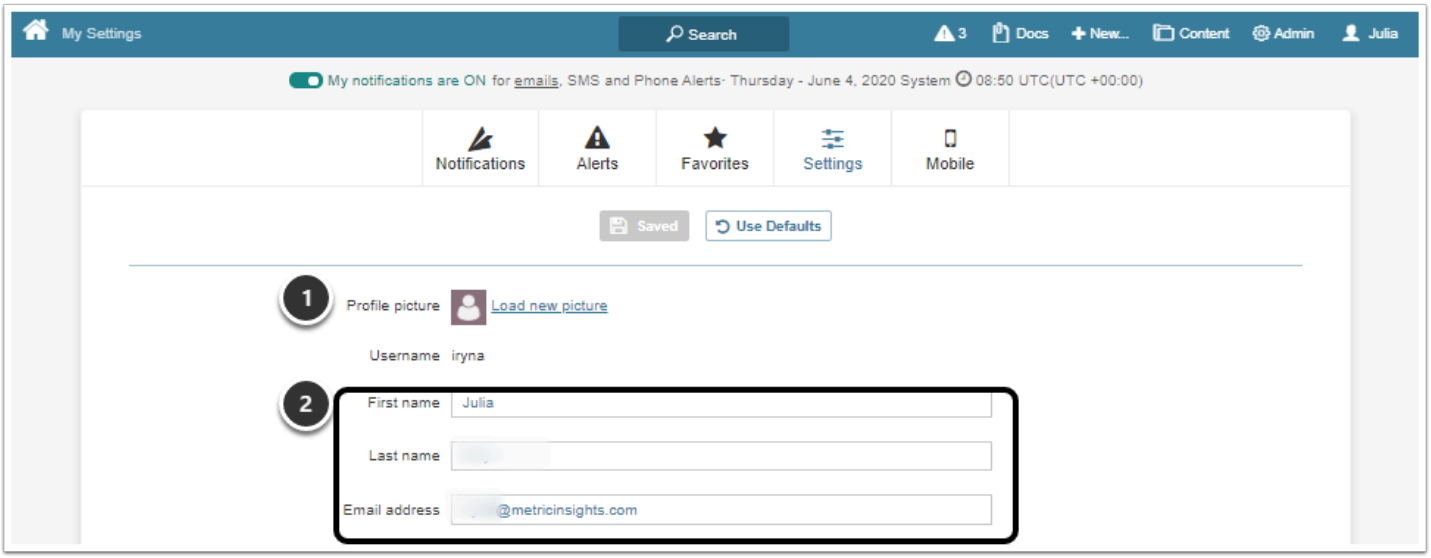
3. User Preferences

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

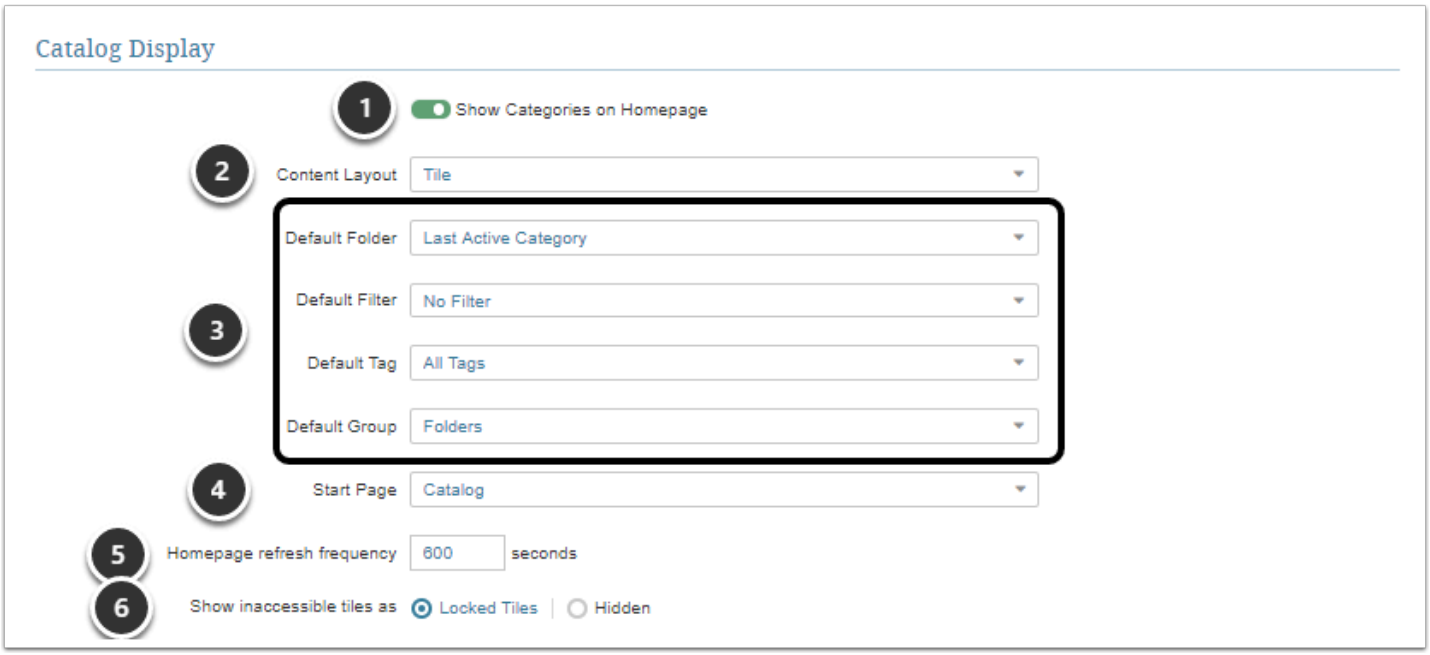


This section allows you to:

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

The system does not allow you to change a username.

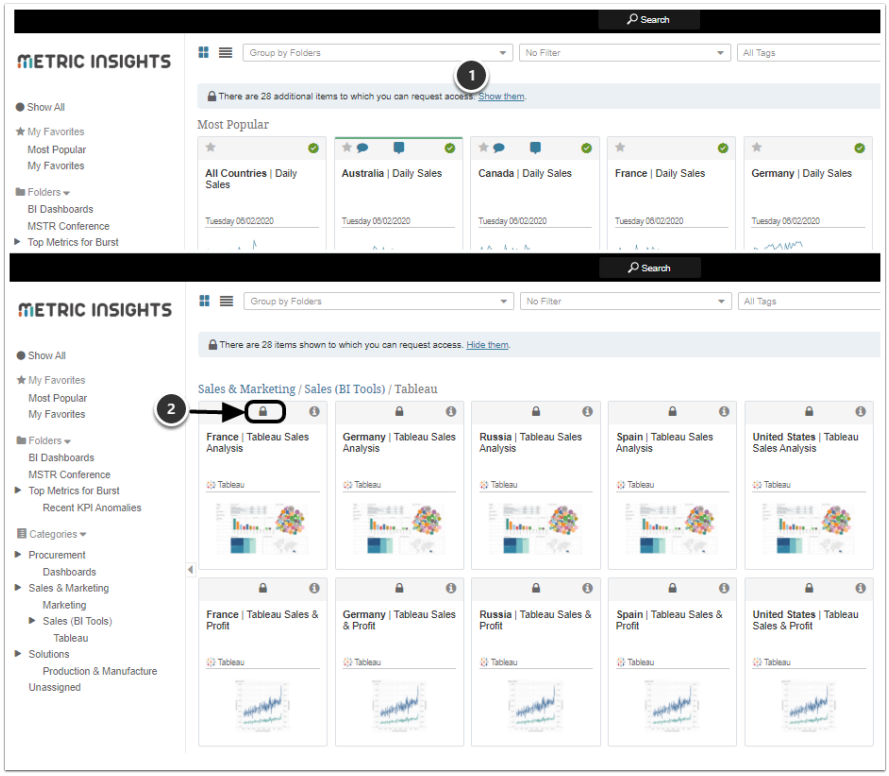
Catalog Display



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.

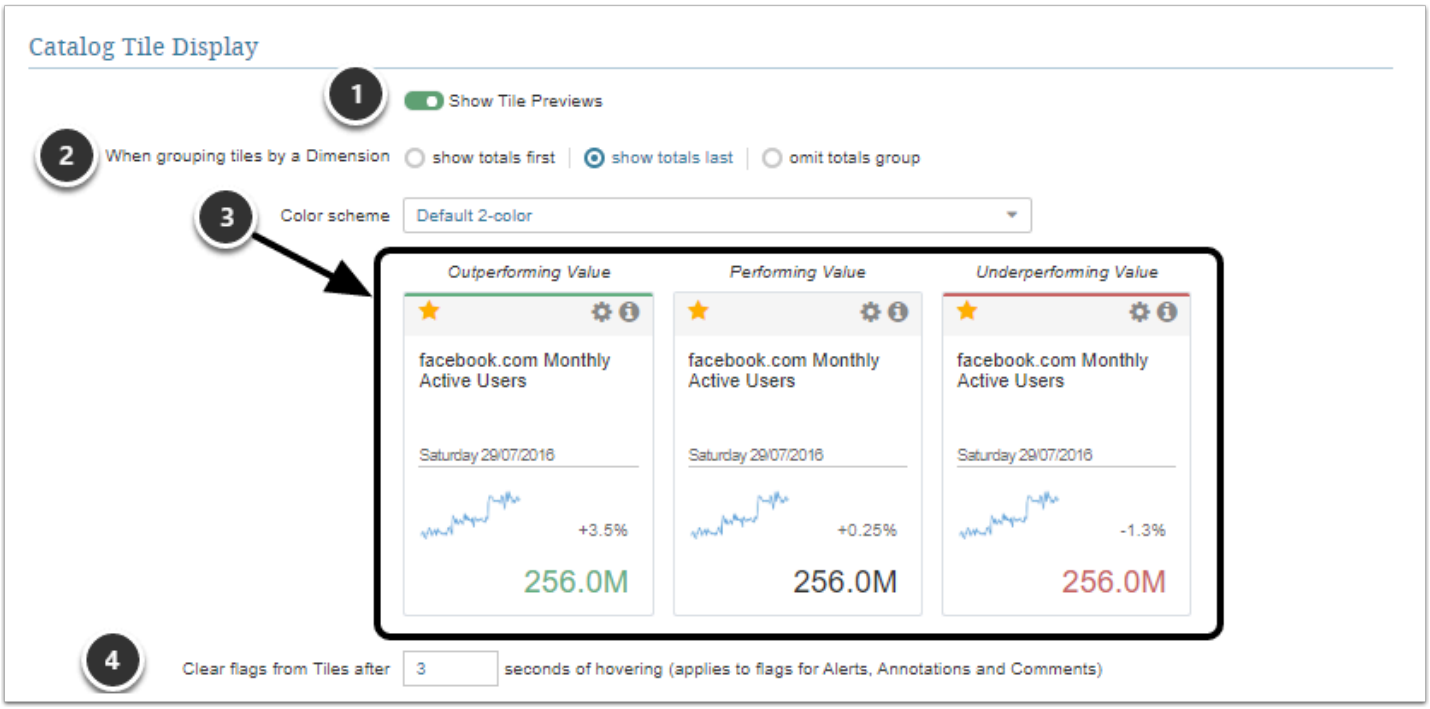


For unauthorized users:

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.

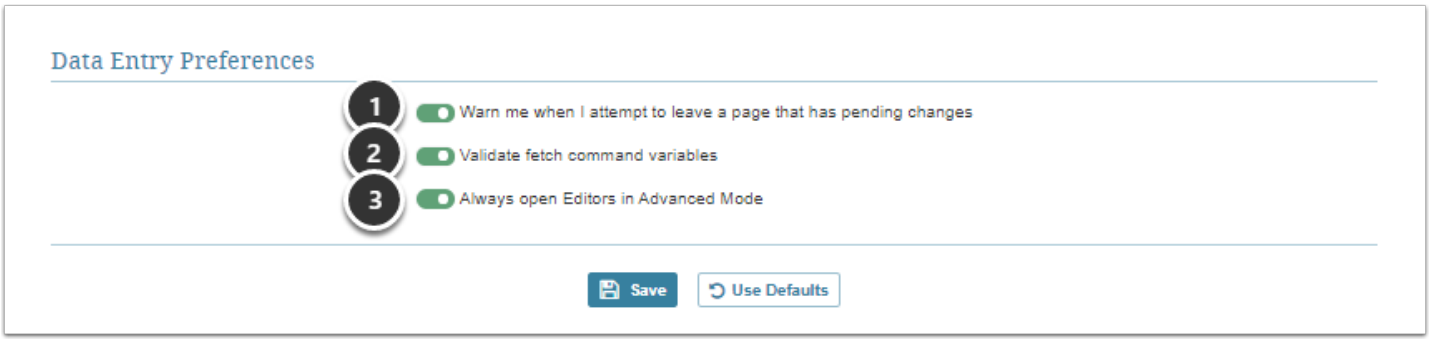
Catalog Tile Display



Catalog Tile Display 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 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)

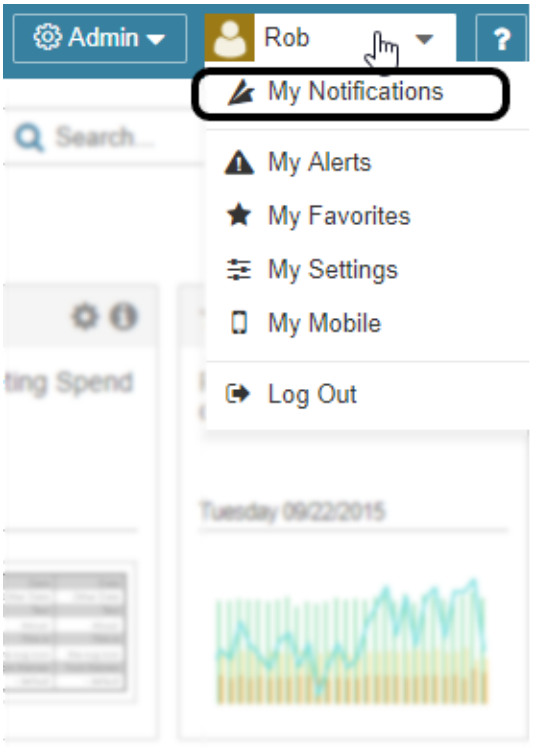
In the *Notifications Editor,* you can customize a number of essential features of Metric Insights, such as Alerts, Favorites, Bursts, Schedules, and your Personal Preferences.

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

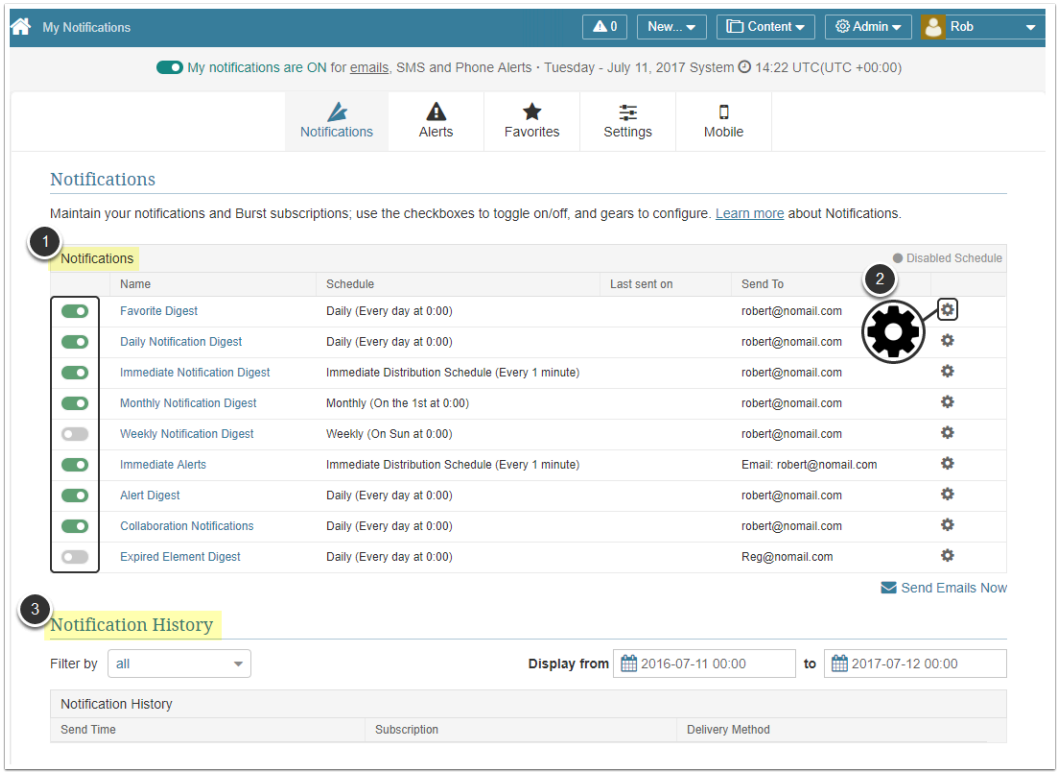
distribution method/schedule?

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.



Notifications Description

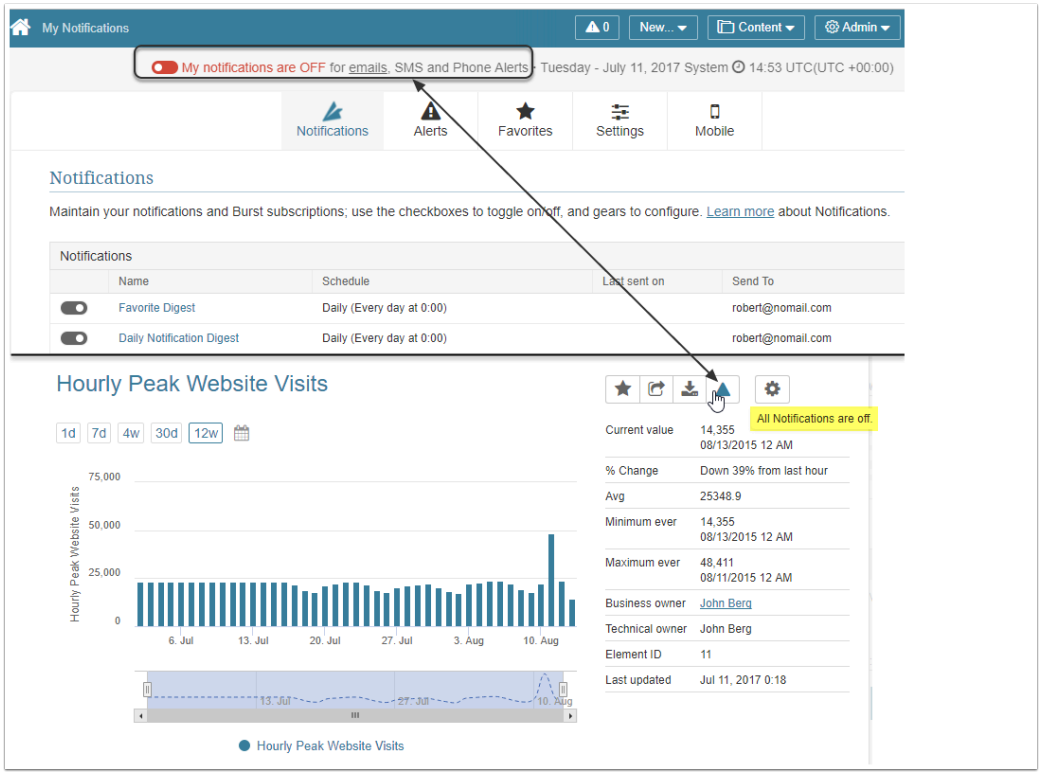
Name	Available Distribution Methods	Description
Favorite Digest	Email Digest: • one email to include all favorite Folders • a separate email for each Favorite Folder	If you open a *Homepage* and look at the upper section of the *Left Sidebar*, there is a list of your **Favorite Folders**. Alternatively, access *My Notifications* > *Favorites*. 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. Requesting a Favorite Digest
Daily Notification Digest	Email Digest	One of the default options offered for subscribing to a Report Notification. 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. 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. Same rules apply to: Weekly / Monthly Notification Digest.
Immediate Notification Digest	Email Digest	One of the default options offered for subscribing to a Report Notification. 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.
Burst *(Optional)*	Email Digest	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.) Creating a Burst

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	• Immediate email • SMS message • Phone alert (Mobile app push notification)	Alert Rules can be created for Metrics, Reports, and External Reports. 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. **NOTE:** 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 Setting up Alerts
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	• Email Digest • Immediate email • Phone alert (Mobile app push notification)	You can get either digests or immediate notifications for collaborative items: • If you follow certain Discussions or Users: Following discussions/users • In all / owned / favorite Metrics and Reports
Expired Element Digest	Email Digest	Depending on your selection, this Digest can include: • All expired Metrics and Reports • Expired Metrics and Reports where the User is an Owner • Expired Metrics and Reports which had been added to a User's Favorite Folder

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



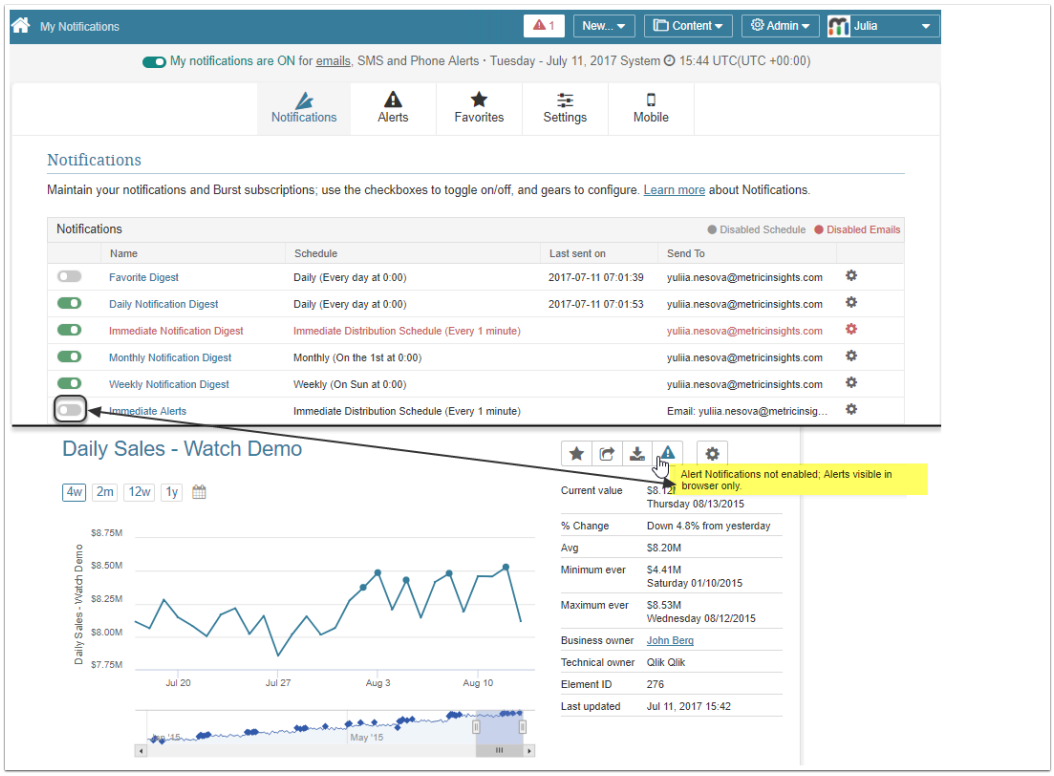
At the top of *My Notifications* screen, you can toggle **Notifications OFF**, which will stop ALL of your notifications from being sent to you.

```
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.

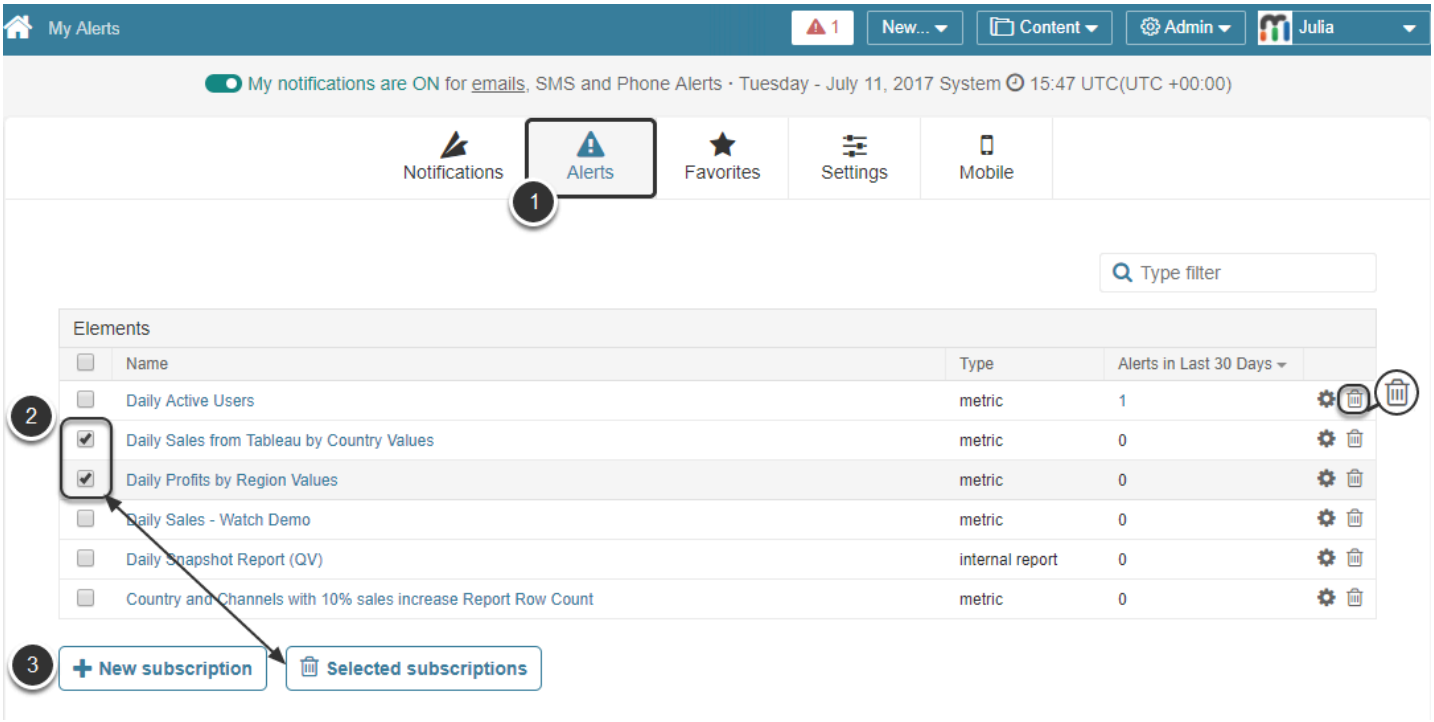
Notifications not enabled



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:

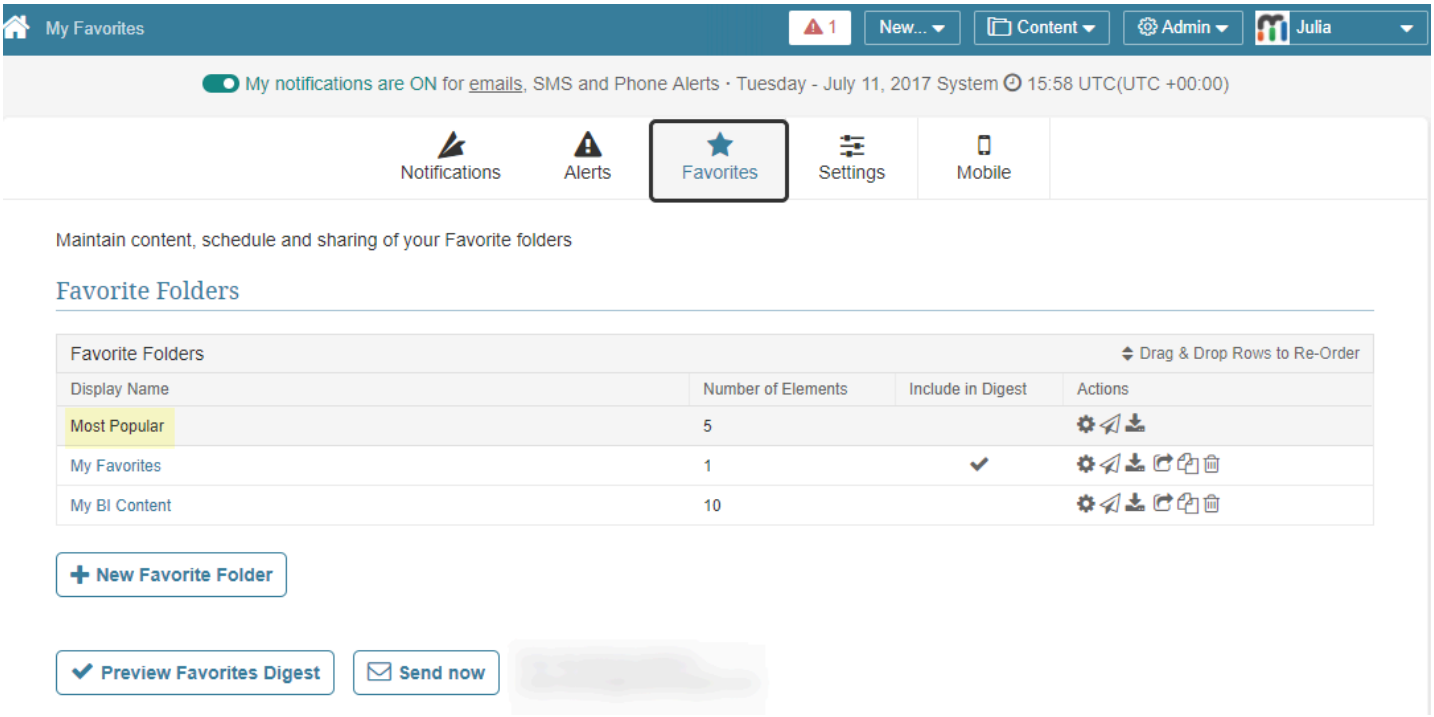
```
Notifications not enabled; Alerts visible in browser only.
```

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



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?



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 th 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

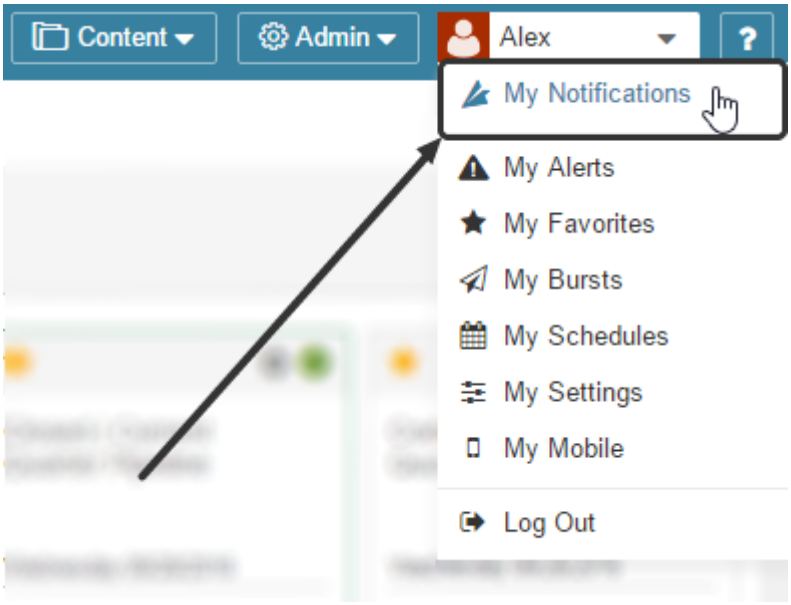
To learn how to configure your profile in My Settings tab, go to: My Preferences

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

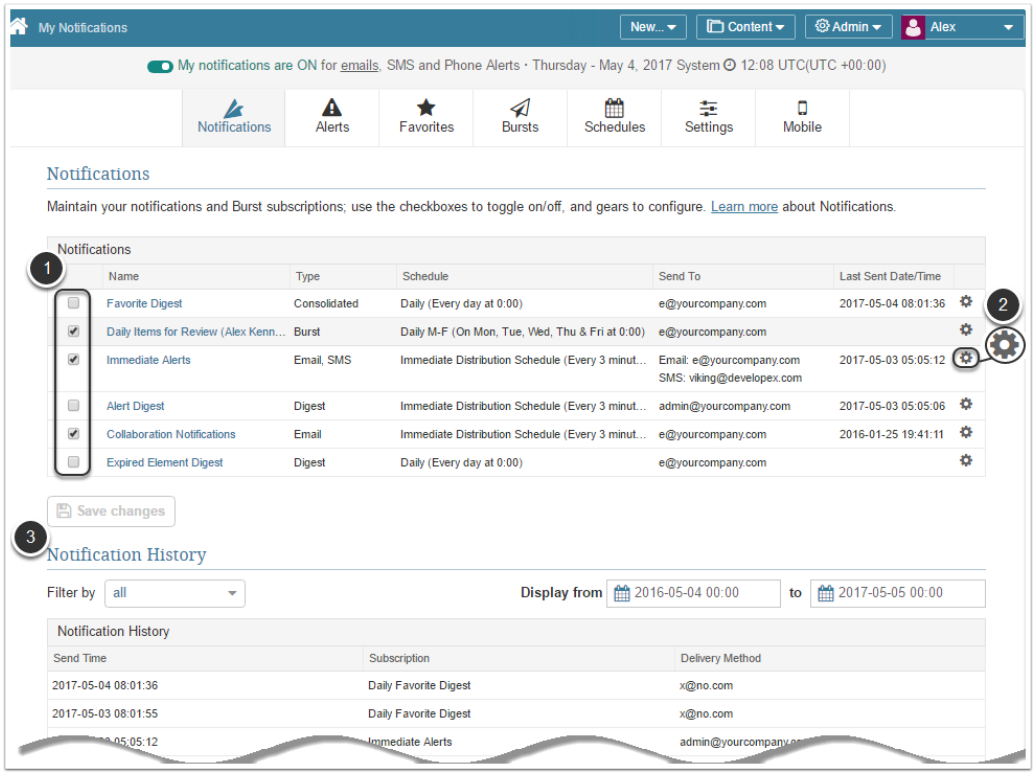


1. What Notifications am I subscribed to? How to set up distribution method/schedule?

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



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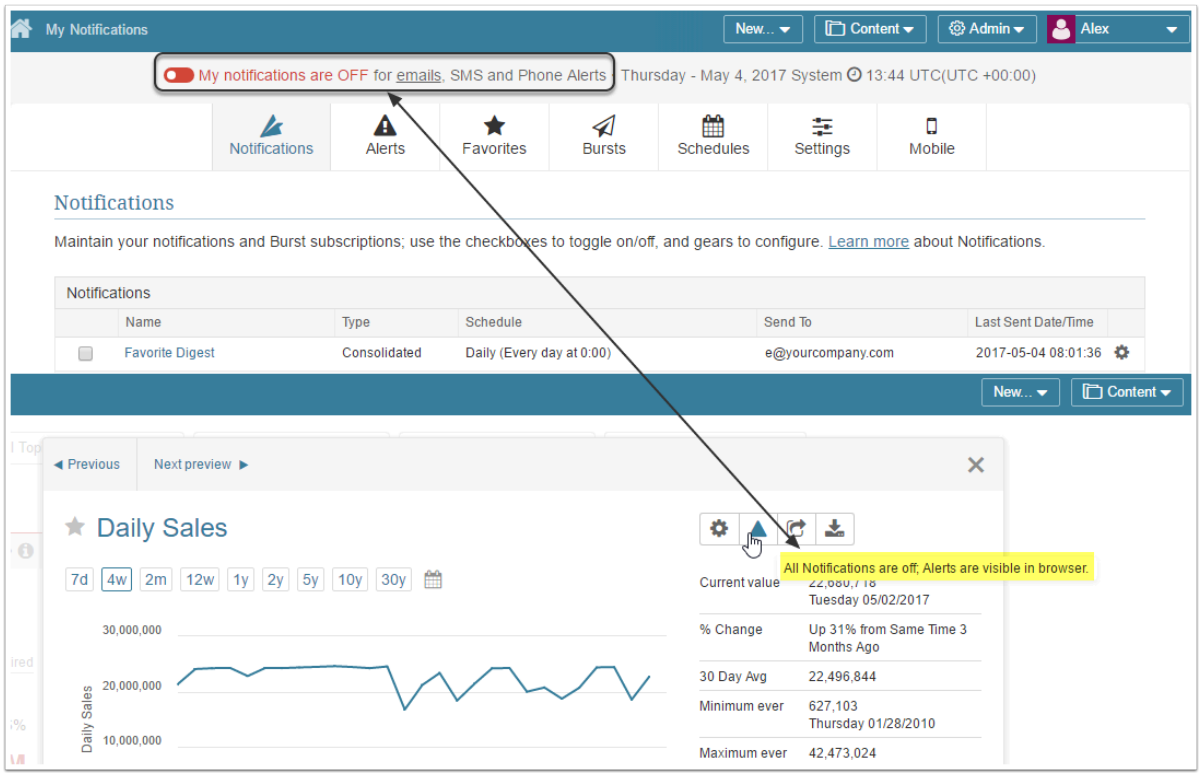
Burst *(Optional)*	Email	Burst is a scheduled email notification with updates per selected element(s). (In contrast to Favorite Digests, it is an update sent to multiple users at once. For example, a weekly "Top Performers" Burst to a sales team.) Creating a Burst

Name	Available Distribution Methods	Description
Immediate Alerts	• Immediate email • SMS message • Phone alert (Mobile app push notification)	Alert Rules can be created for Metrics, Reports, and External Reports. 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. **NOTE:** 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 Setting up Alerts
Alert Digest	Email Digest	See: Immediate Alerts Alert Digest is sent on schedule and includes updates for all Alerts fired since the last email.
Collaboration Notifications	• Email Digest • Immediate email • Phone alert (Mobile app push notification)	You can get either digests or immediate notifications for collaborative items: • If you follow certain Discussions or Users: Following discussions/users • In all / owned / favorite Metrics and Reports
Expired Element Digest	Email Digest	Depending on your selection, this Digest can include: • All expired Metrics and Reports • Expired Metrics and Reports where the User is an Owner • Expired Metrics and Reports which had been added to a User's Favorite Folder

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



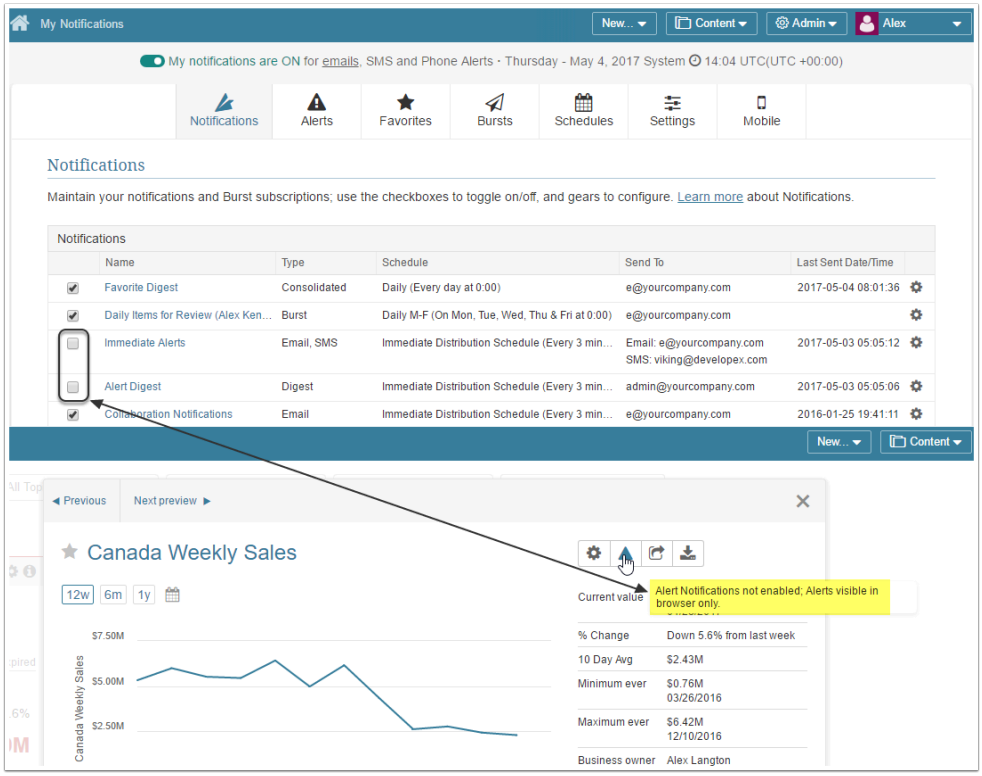
At the top of *My Notifications* screen, you can toggle **Notifications OFF**, which will stop ALL of your notifications from being sent to you.

```
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.

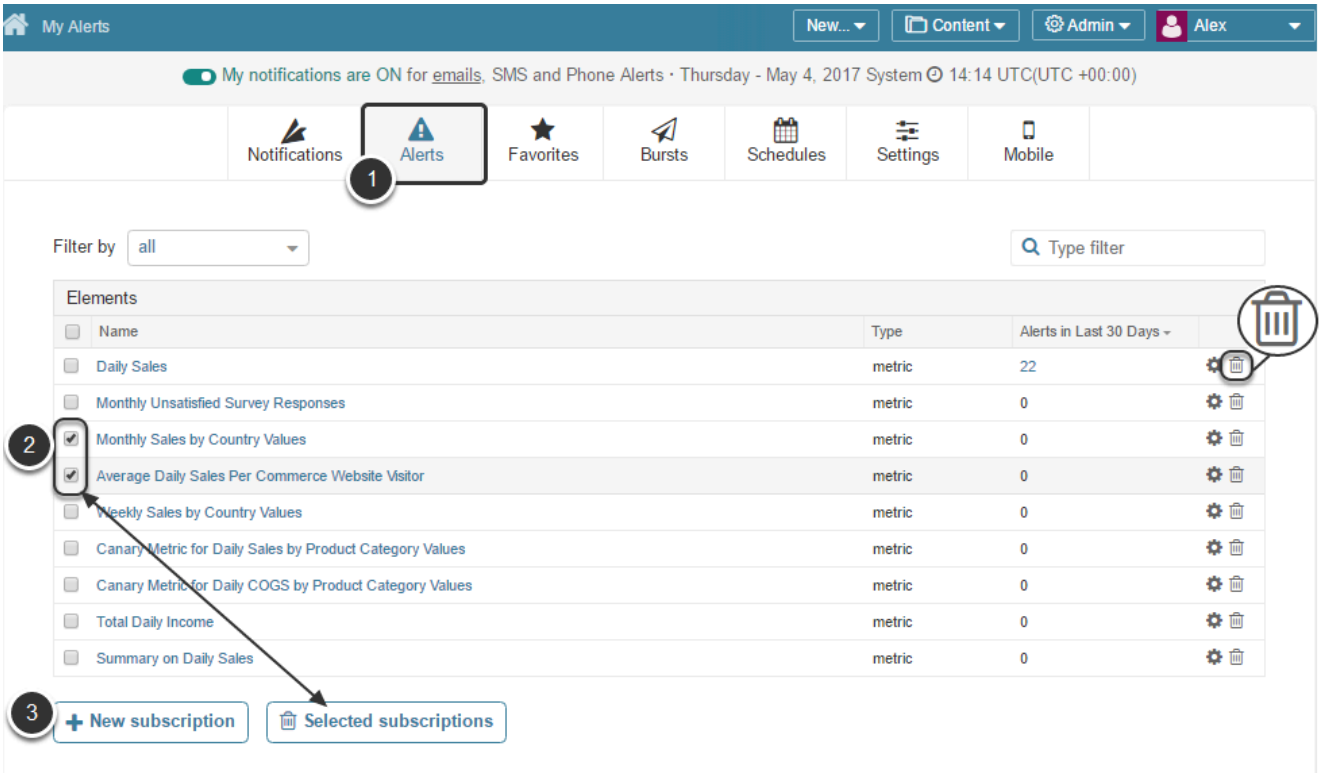
Notifications not enabled



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:

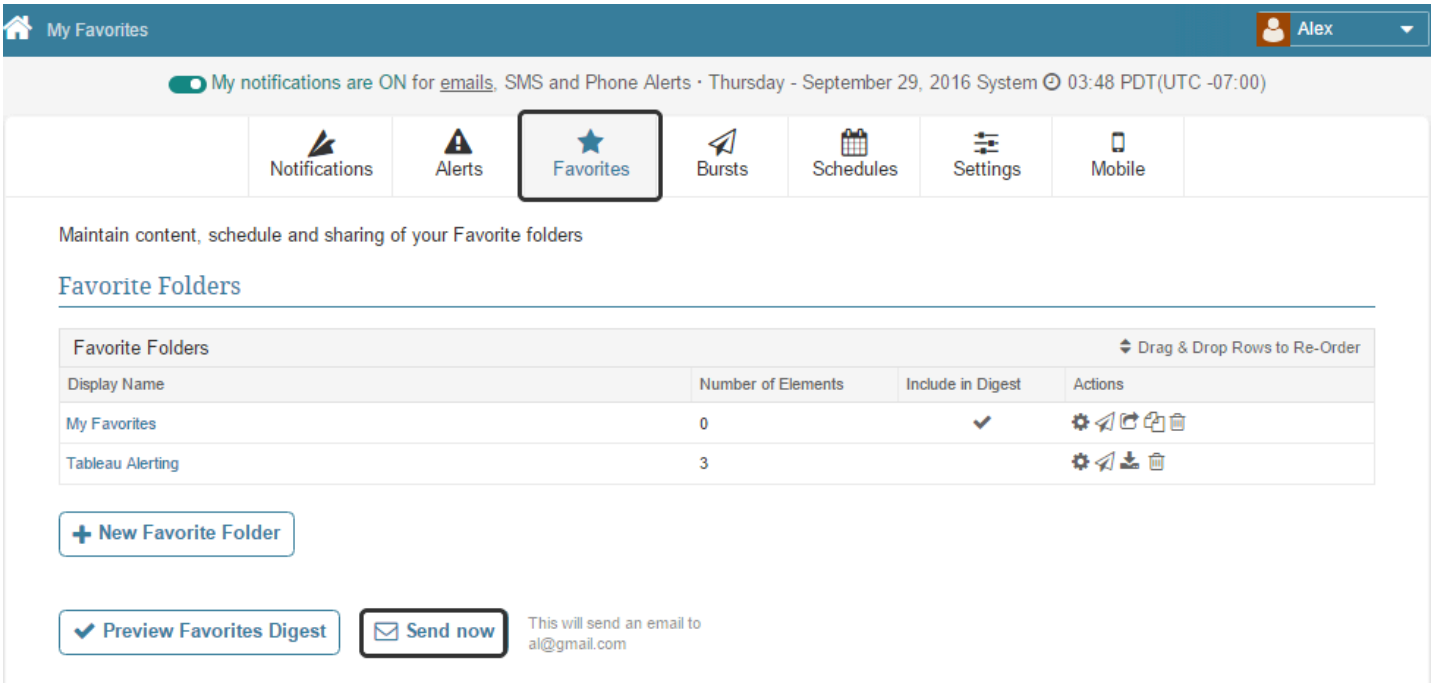
```
Notifications not enabled
```

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



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?

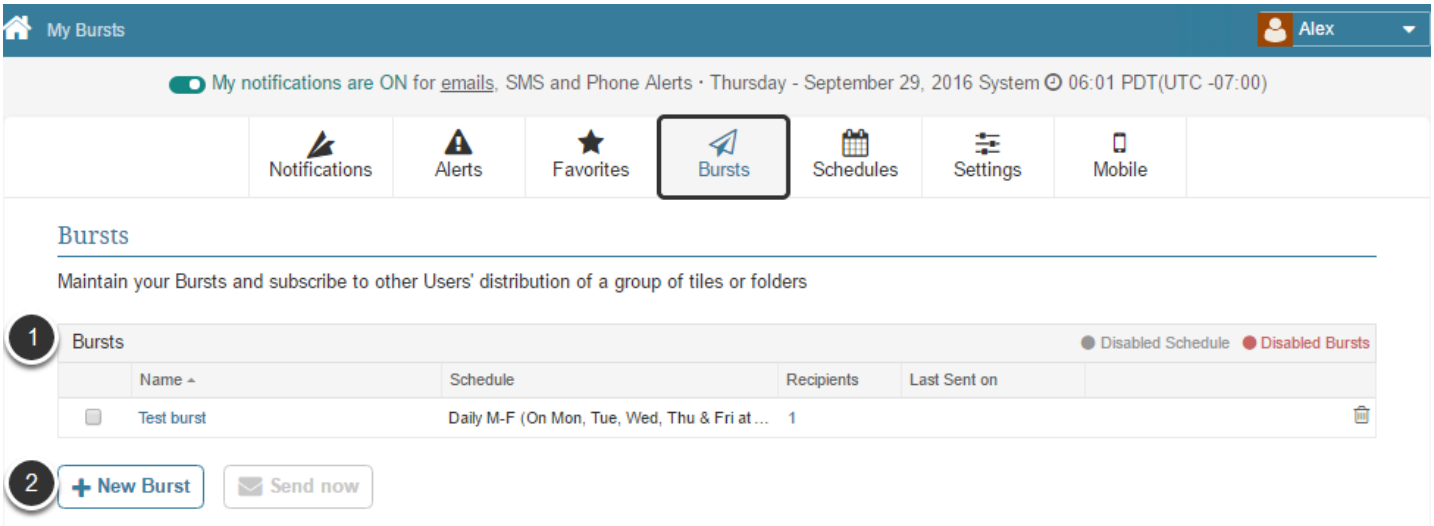


In this tab, you can see all your Favorite folder and any Favorite folders that other created and have shared with you.

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?

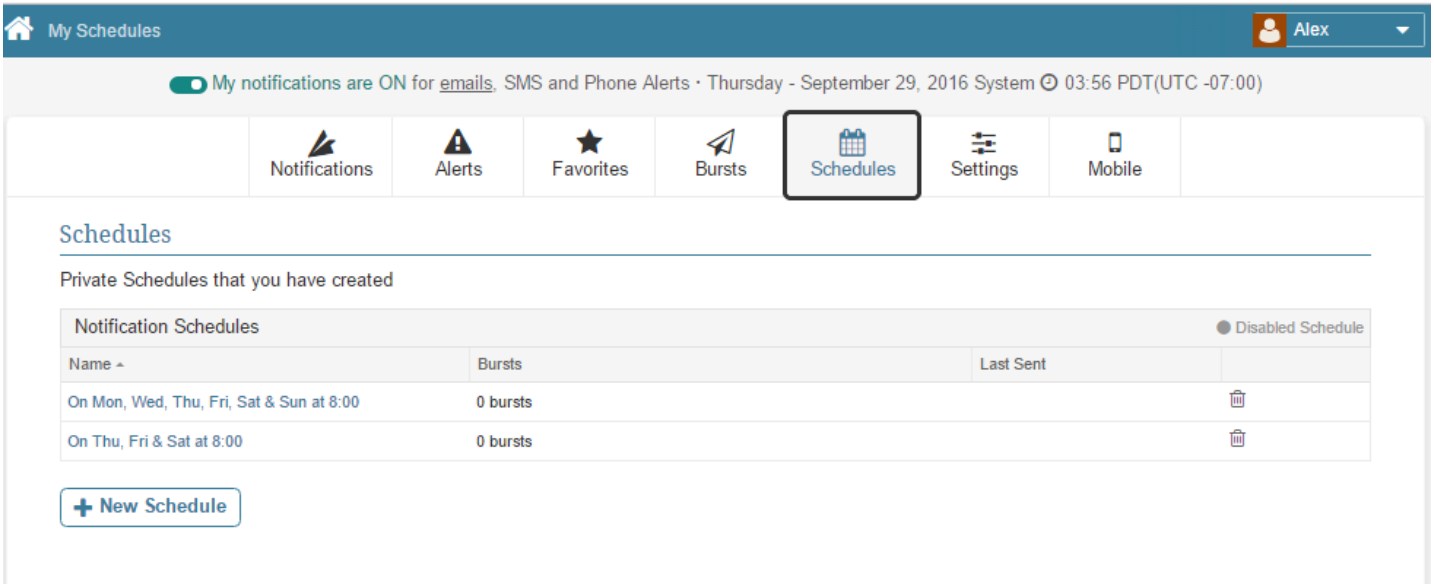


Burst is a scheduled email notification informing Users about updates for selected element(s).

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?



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?

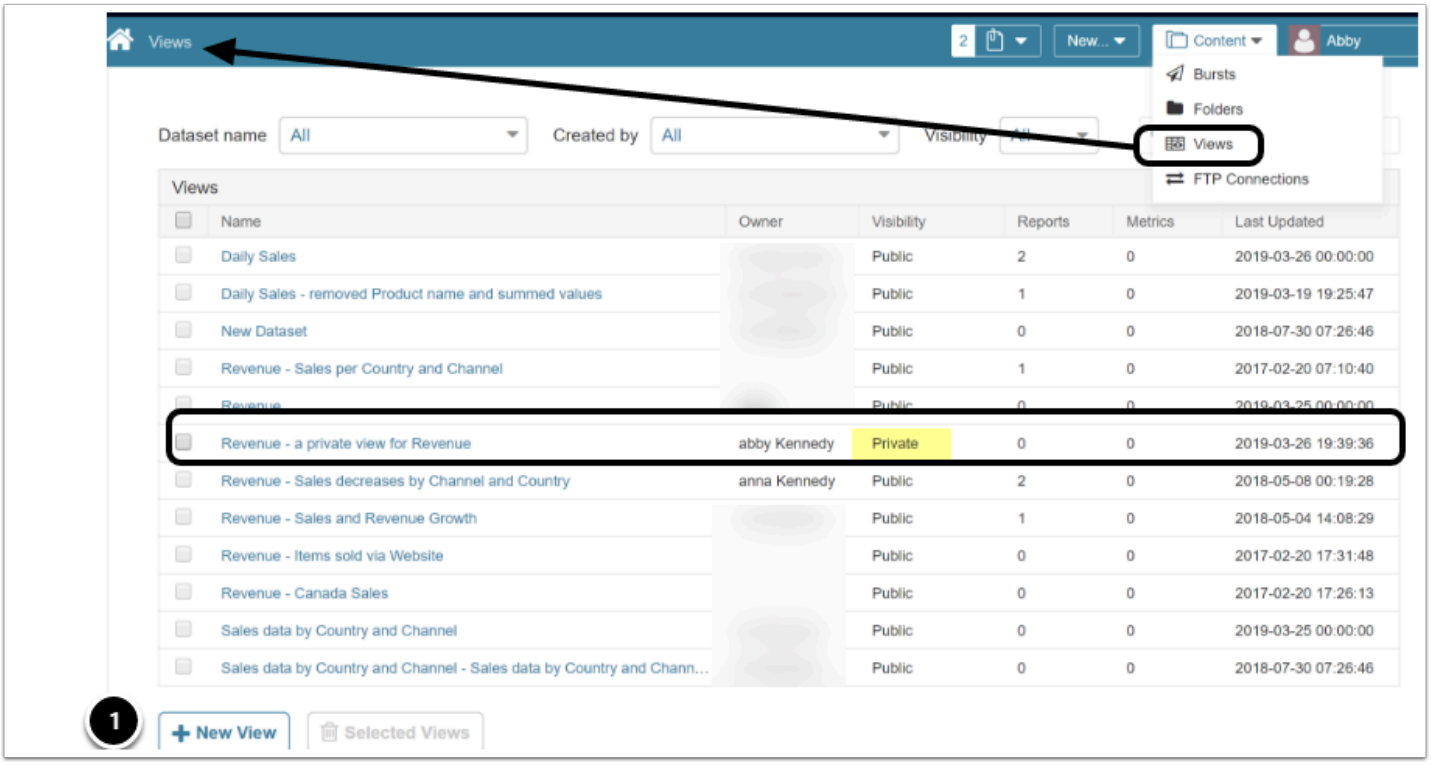
KPI Alerts: Basics for the Alert Wizards - KPI Rules
Bursts: Create a new Burst

4. Element Viewers

4.1 Access, Create, and modify Dataset Views

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

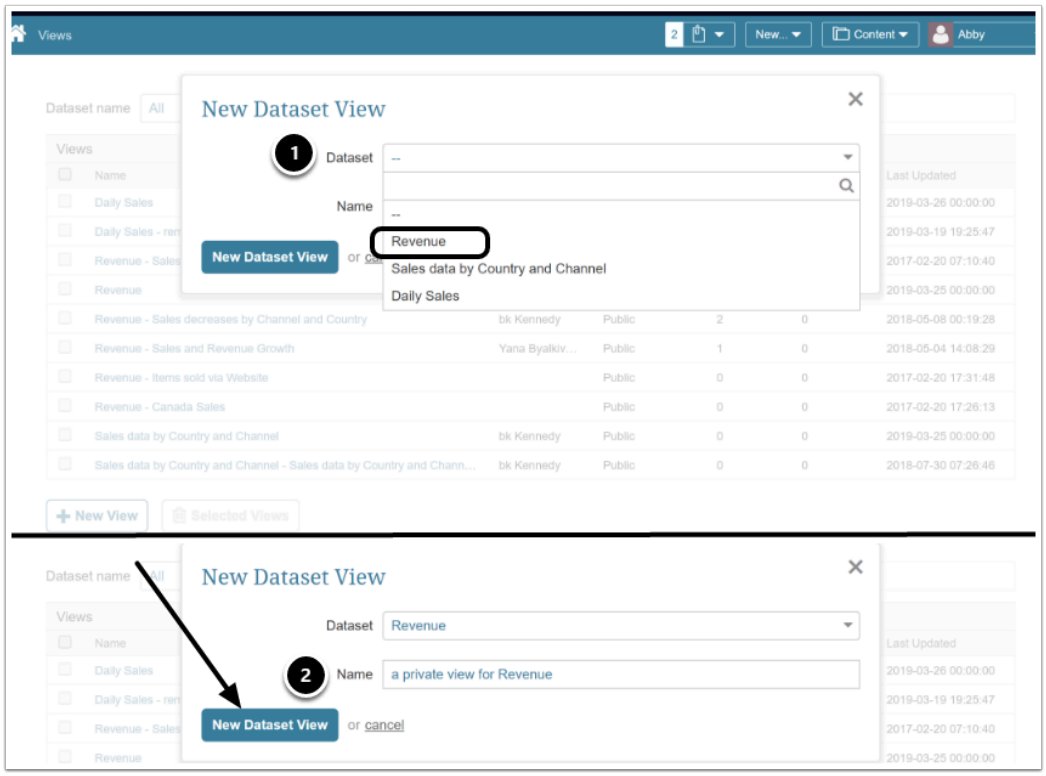
1. Access Content menu > Views



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

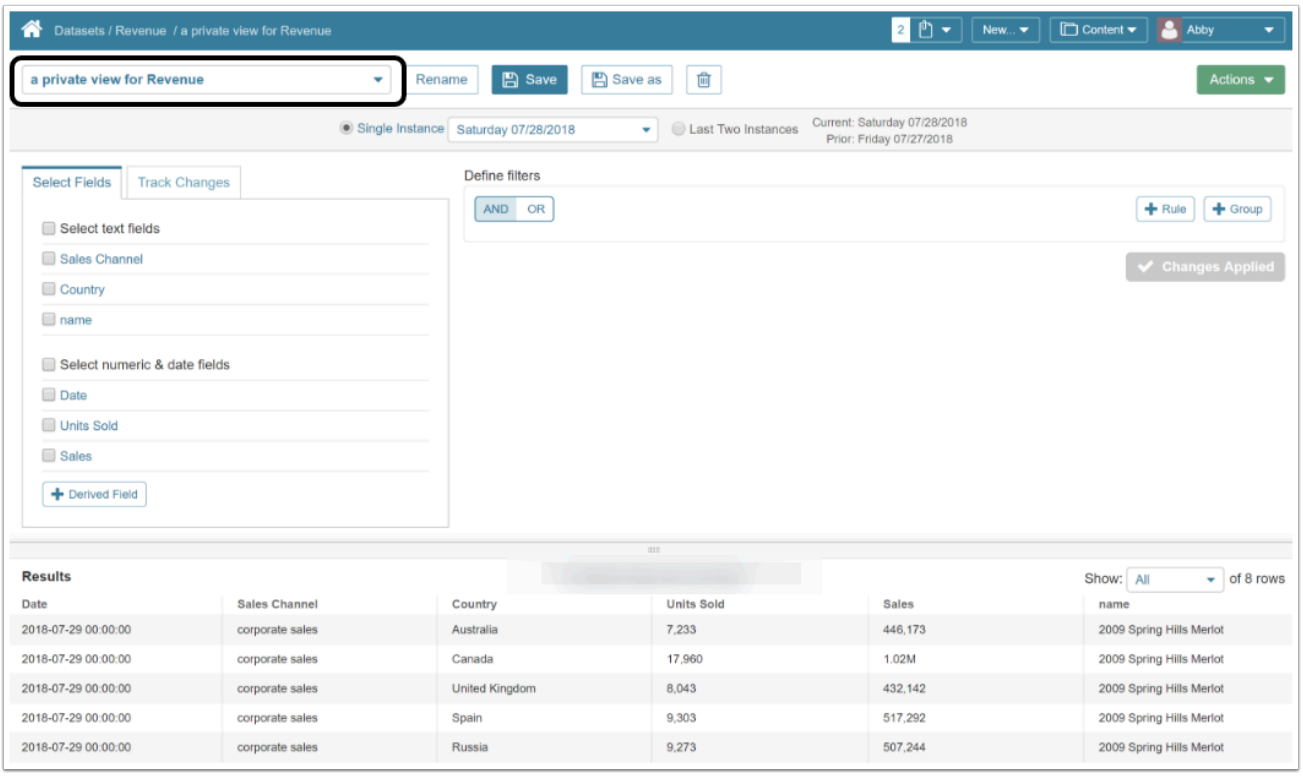
2. Setup the new View



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

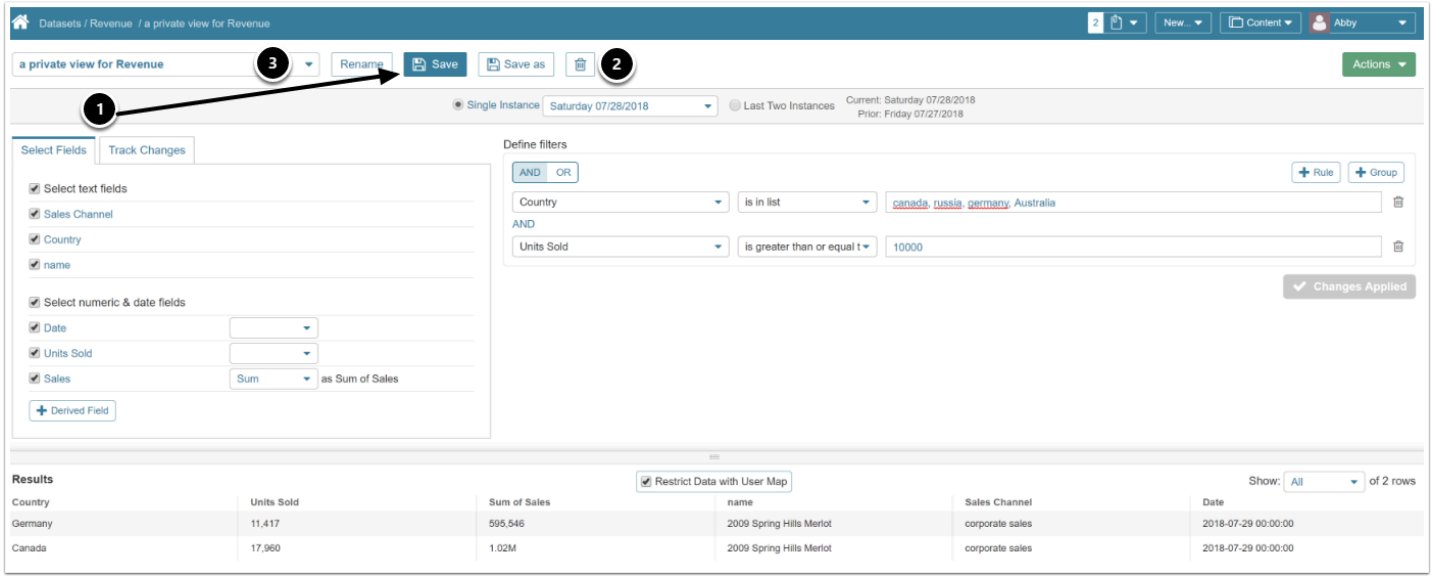
3. Use your View to uncover anomalies or trends by using the Filters



The 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



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.

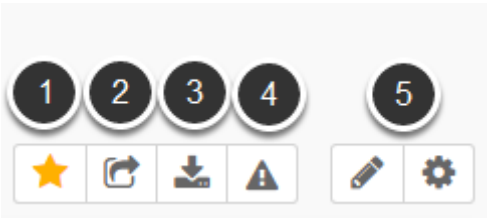
1.1. Alternative View Buttons

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-filterted 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

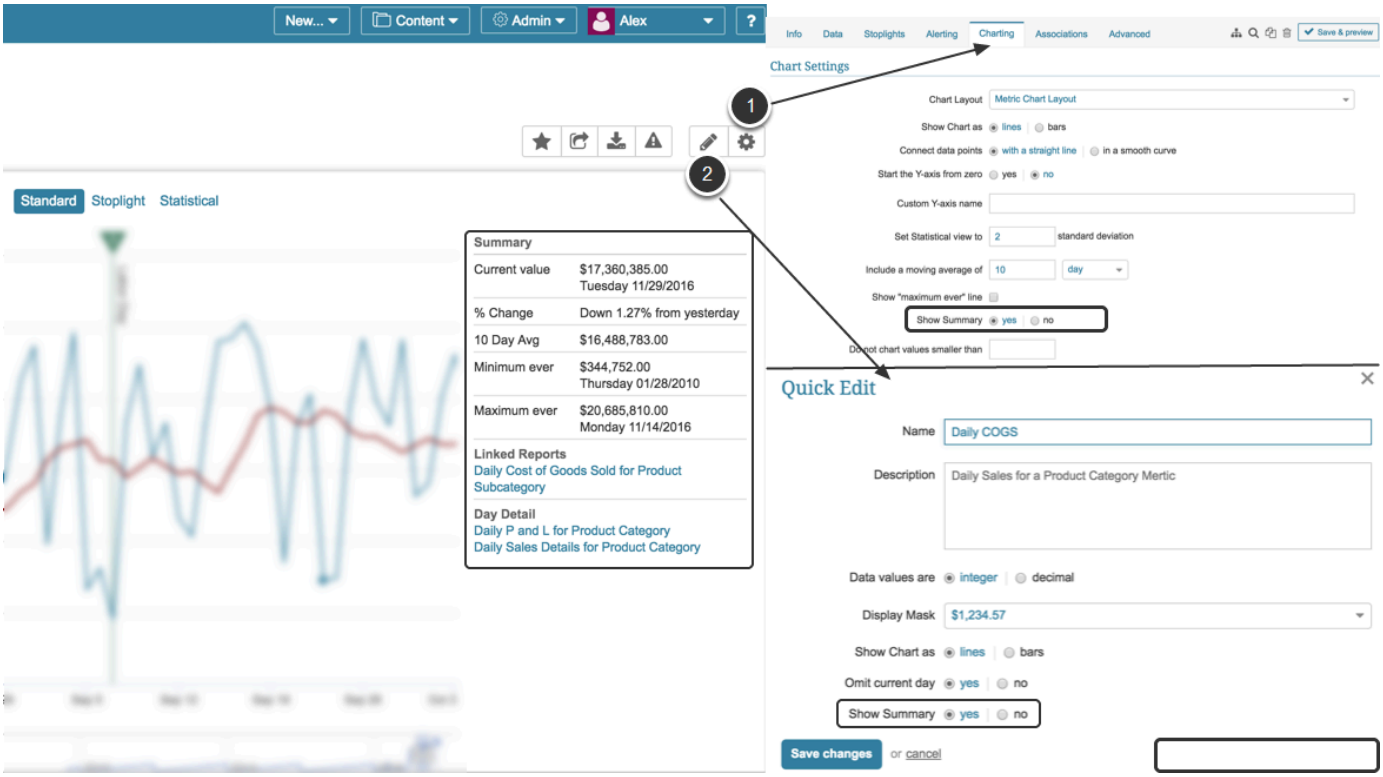


1. **Favorites** button is used to to add or remove the element from a Favorites folder. One element can belong to multiple Favorites folders
2. **Share** button provides a user with two options: **Share right now** (as email) or **Share via Burst**
3. **Download data** button allows to download a file 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

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



Metric summary information is added to new Metrics by default.

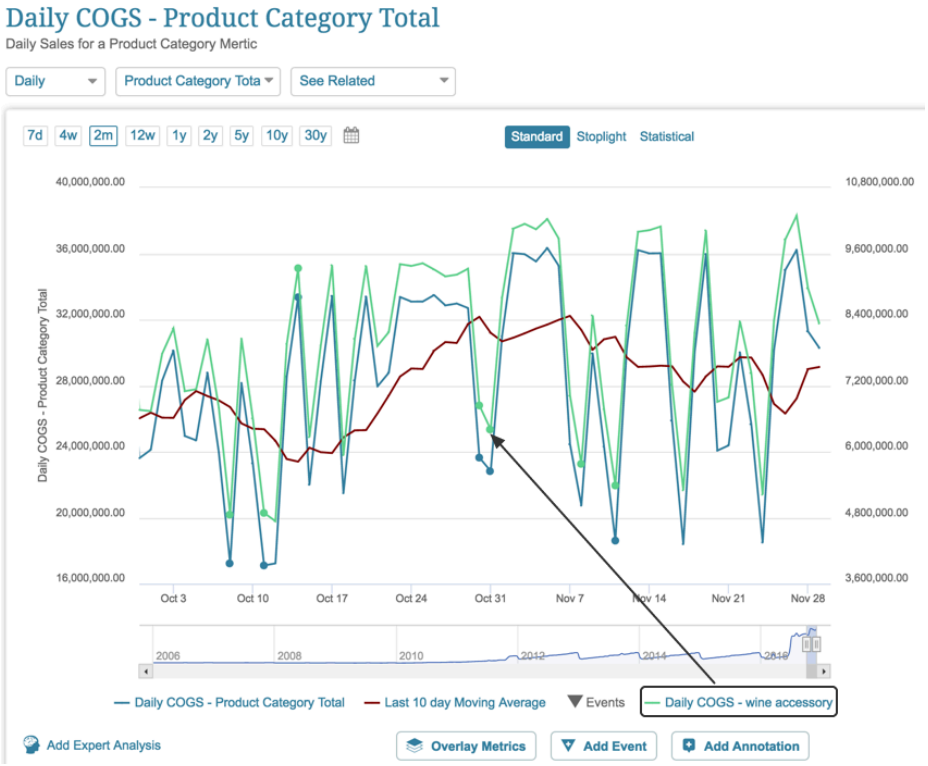
To enable it for previously created elements or hide it from the Viewer, go either to the *Quick Edit* or to the *Metric Editor*:

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



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

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

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

- Last time period when the element has been updated

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

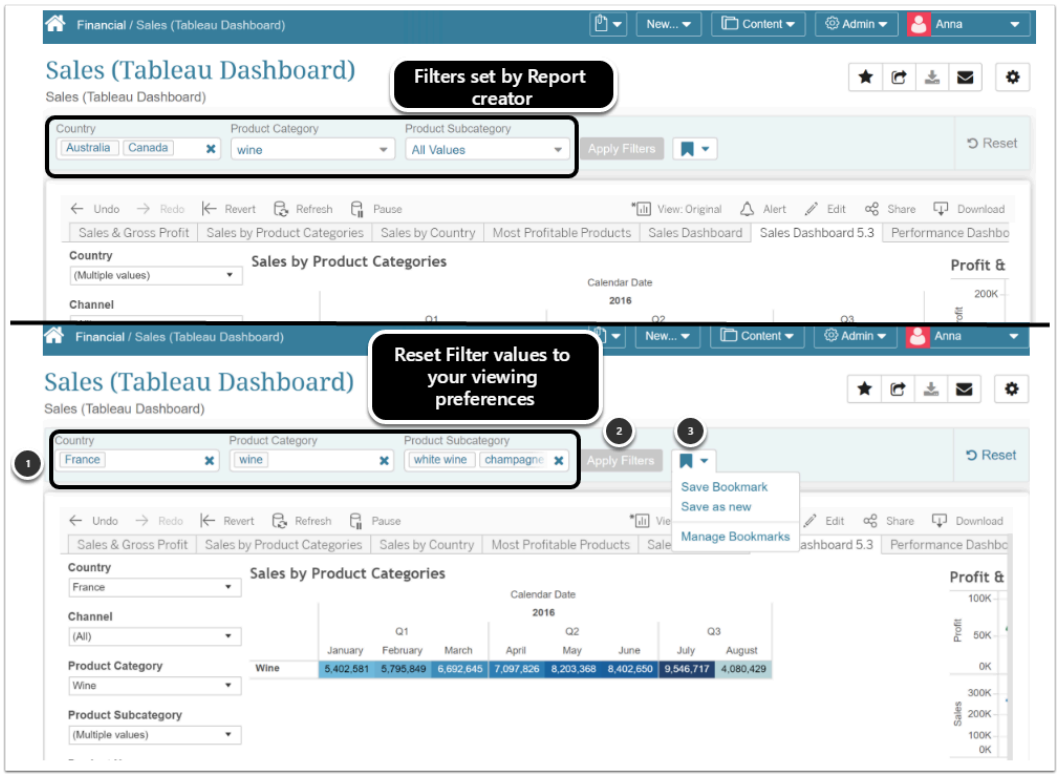
4.3 Setting Personal Bookmarks (External Reports)

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.



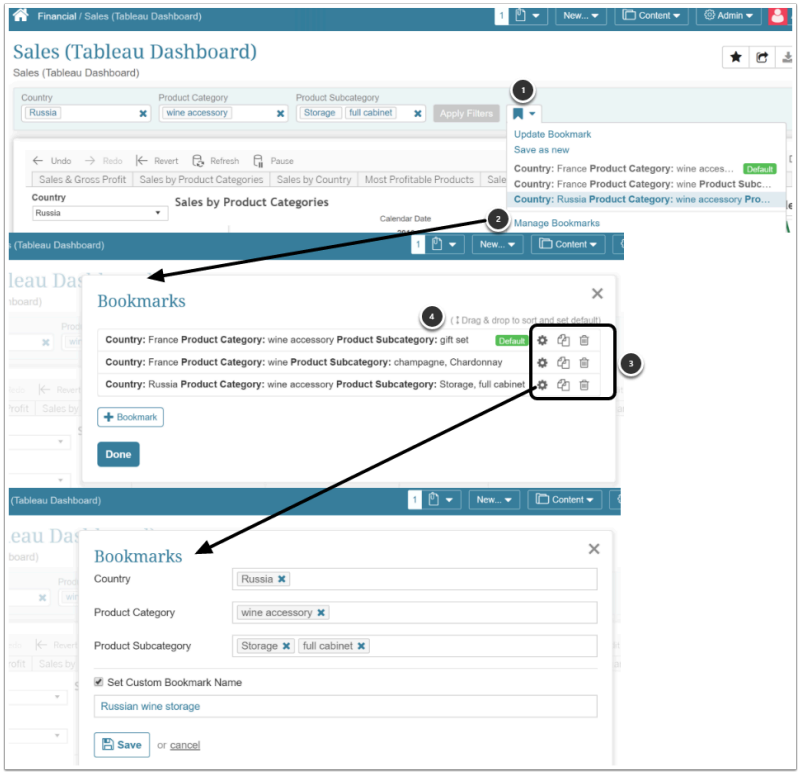
1. Set the **Filters** to the viewing options you want as your personal Viewing defaults

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.

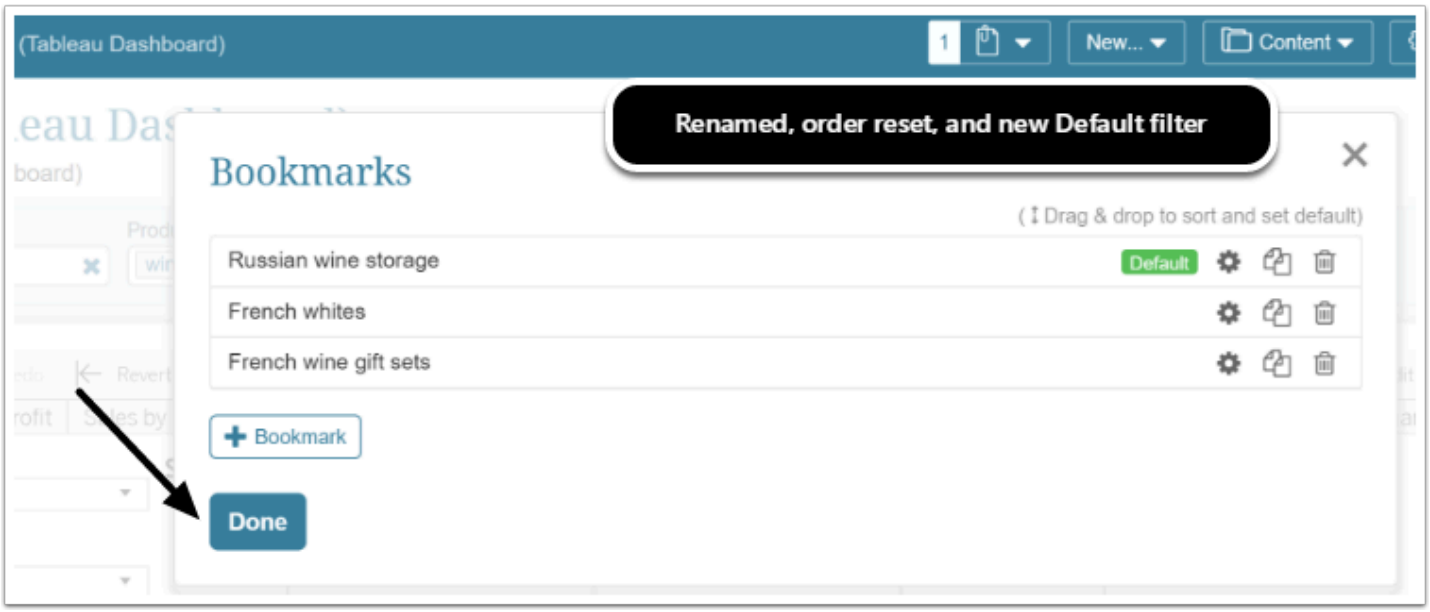
> [6.1.1 new] Bookmarks can be set even if the Metric Insights have been 'hidden' to prevent duplicate Filter display.

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.

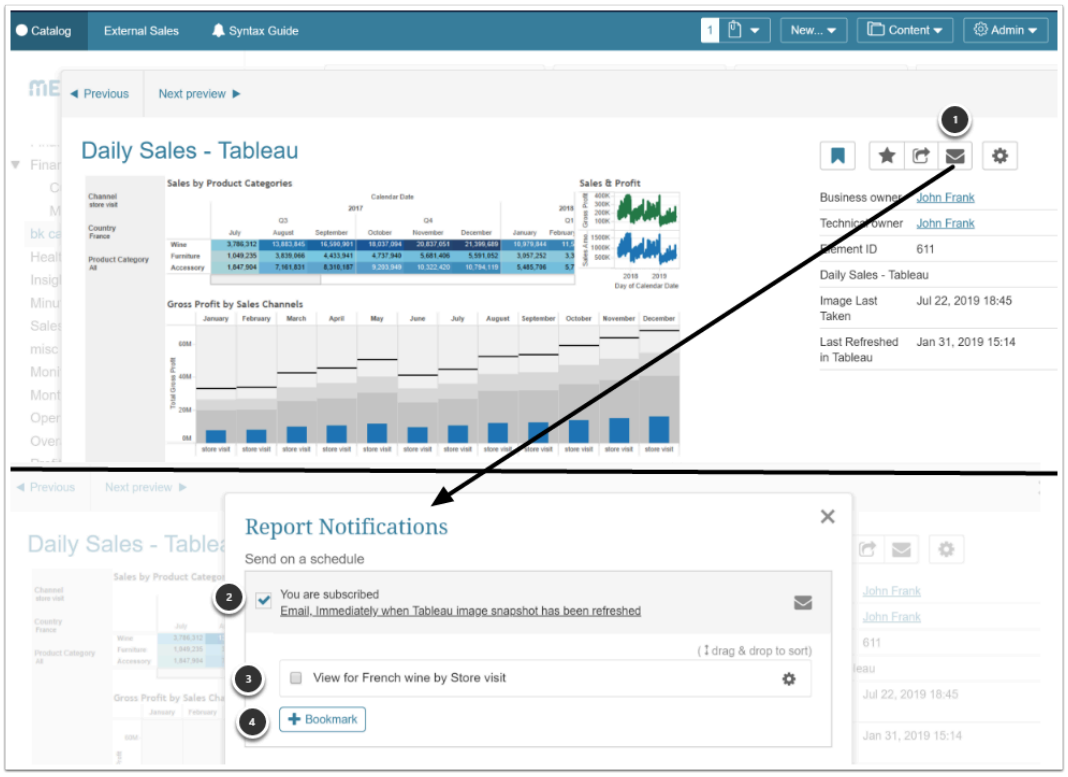


3. Setting Bookmarks for Report Notifications

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.

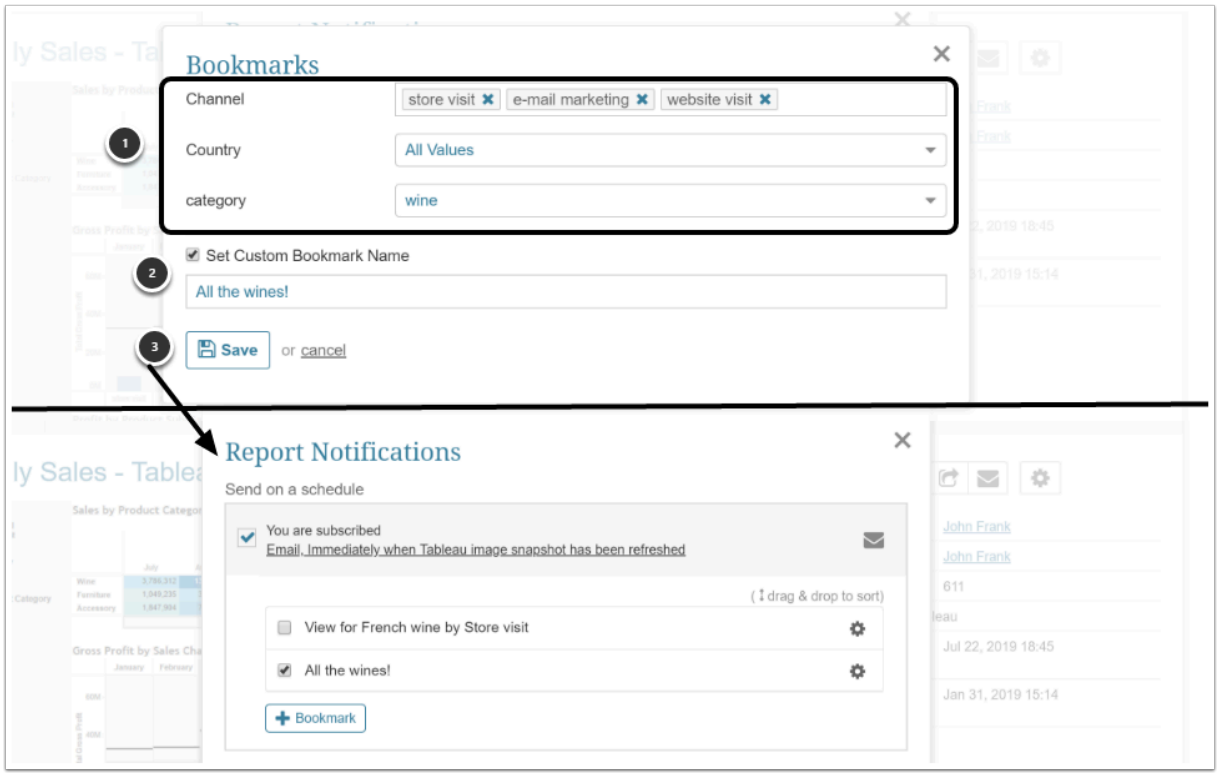
3.1. Select Notifications icon



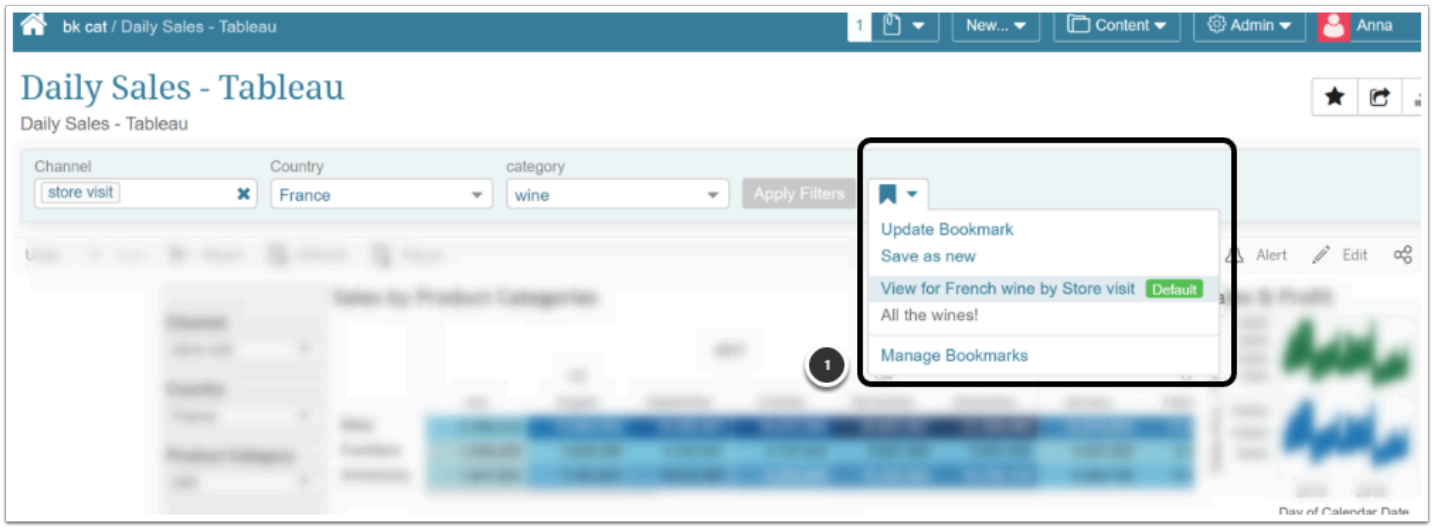
In the ***Tile Preview*** (or Report Viewer):

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

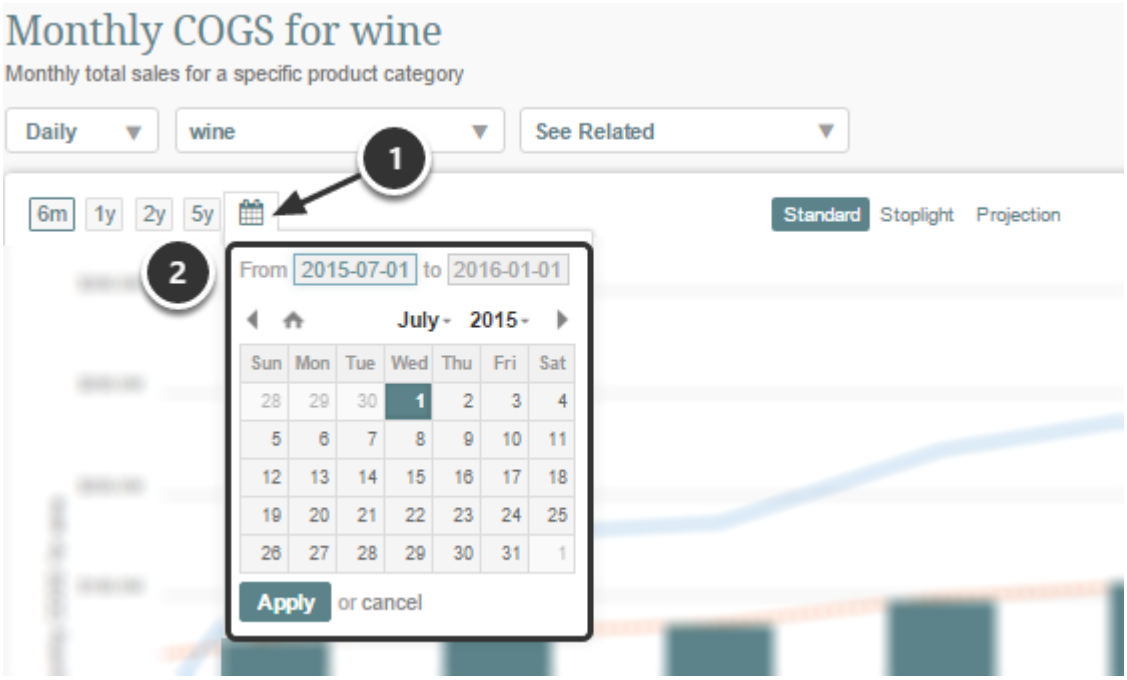


Your Notification Bookmark will also be available via the Viewer, but will not replace your default Bookmark if one was set in the Viewer.

4.4 Creating Custom Date Ranges (Metrics)

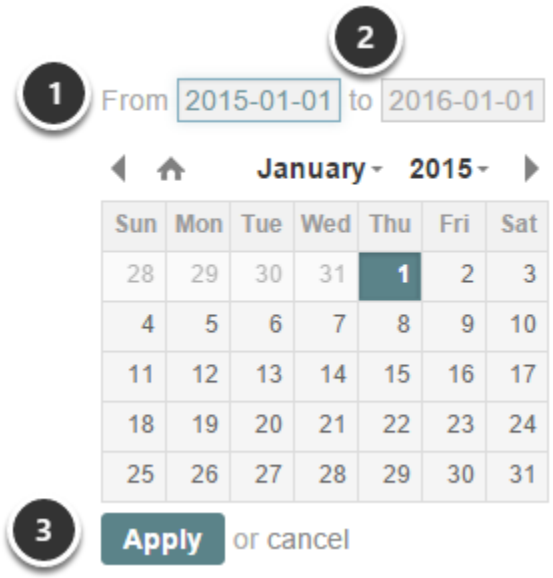
You have the option to configure your Chart Intervals for Metric to view any range of dates you wish.

Access Custom Date Range function via the 'Calendar' button



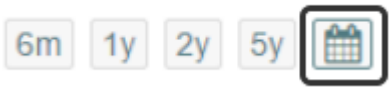
1. Click the **Calendar** icon next to predefined Measurements Intervals
2. The calendar opens

Select required date range from the calendar



1. Point to the **From** filed and select the required starting date from the calendar or add it manually
2. Point to the **to** filed 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

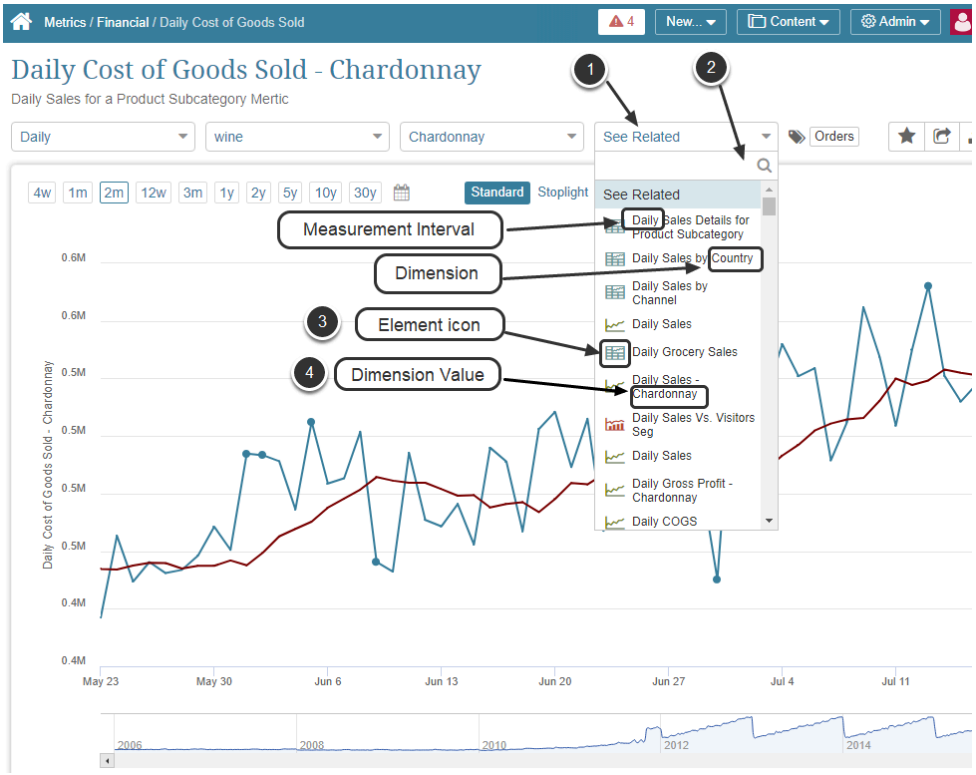
If you want to extend your analysis by looking at other Metrics and Reports that contain the information that may be relevant to the element being viewed, the **See Related** button on the Viewer provides links for immediate access. This drop-down list contains other elements that contain common or similar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

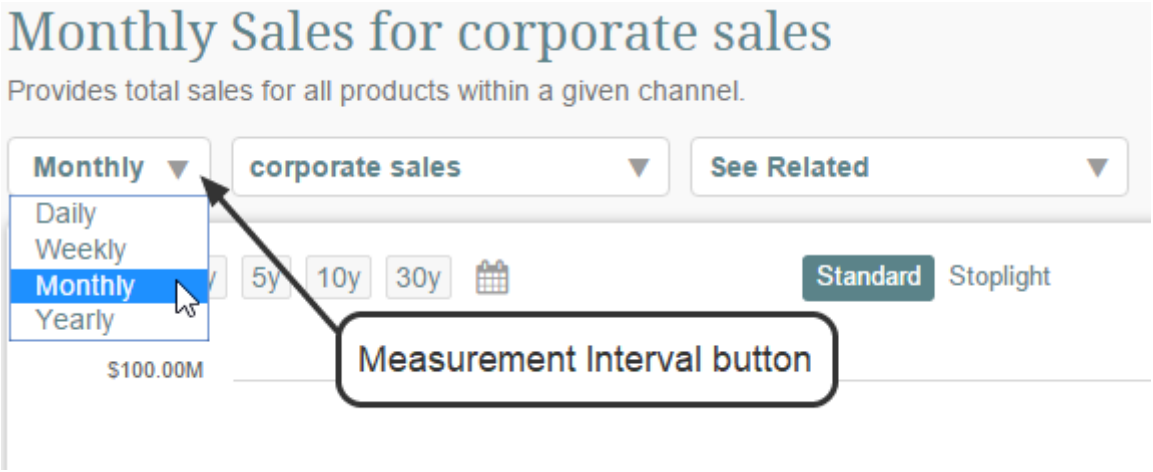


1. To open the list of elements that have common or similar information with the element being viewed, click **See Related.** The drop-down list with elements opens.
2. If you are searching for a specific element(s), enter its full name or key word into the **Search** field.
3. Each entry contains an 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

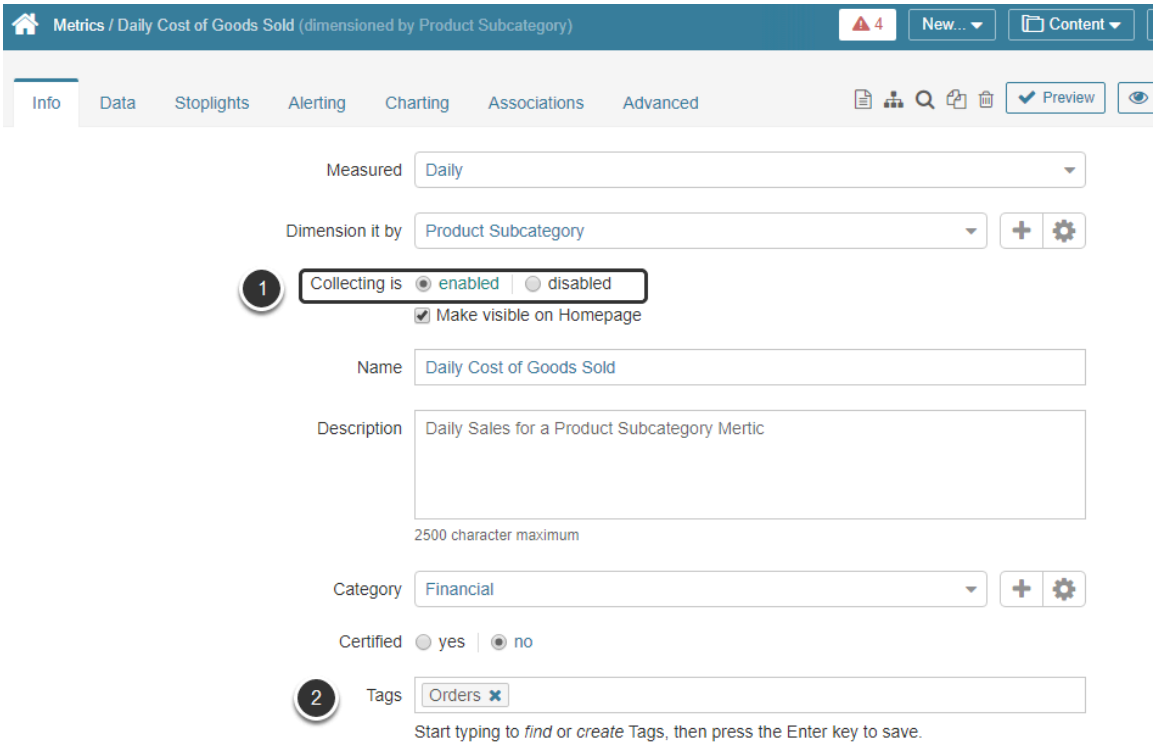
Icon	Element Type
	Metric
	Multi-Metric
	Internal Report
	External Report

2. Related elements by 'Measurement Interval'



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?



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

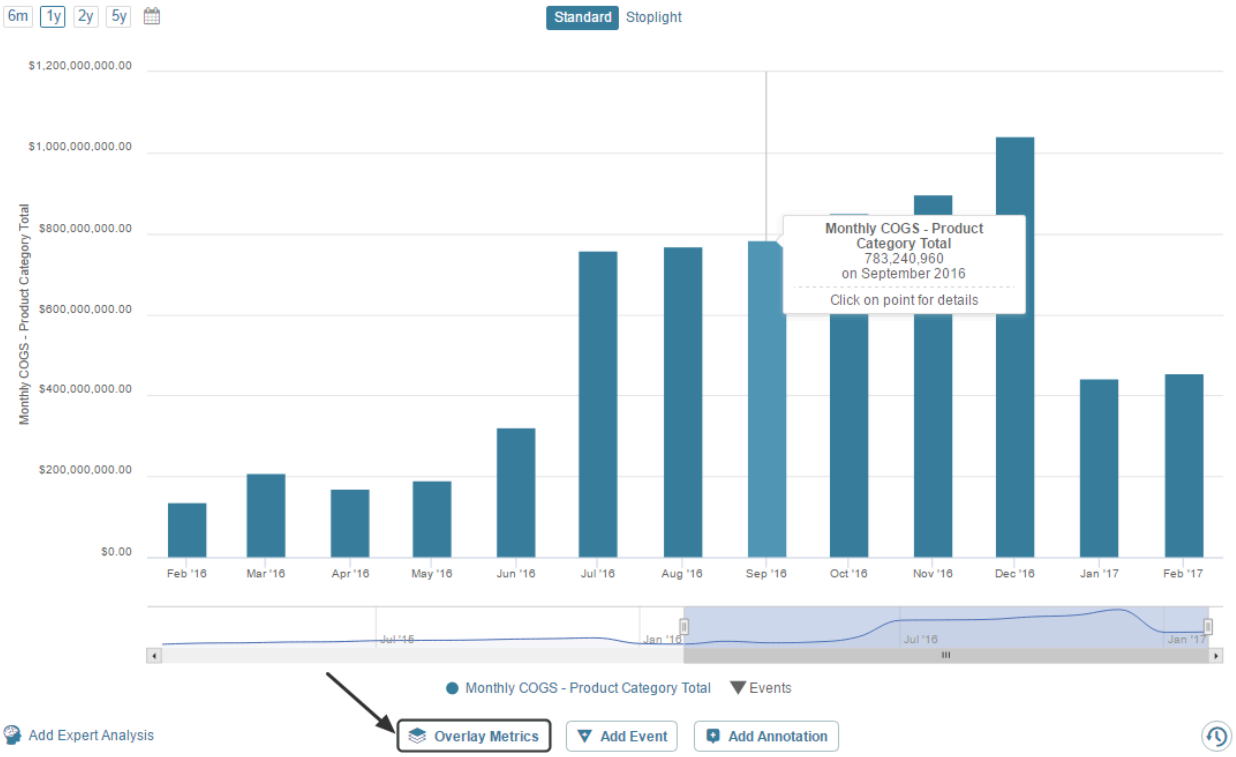
NOTE: Unlike filtering by **Tags** on the Homepage, the element does not need to be **visible on Homepage;** and elements that are **Disabled** will display on the Homepage, but not in the Viewer / **See Related** drop-down

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.

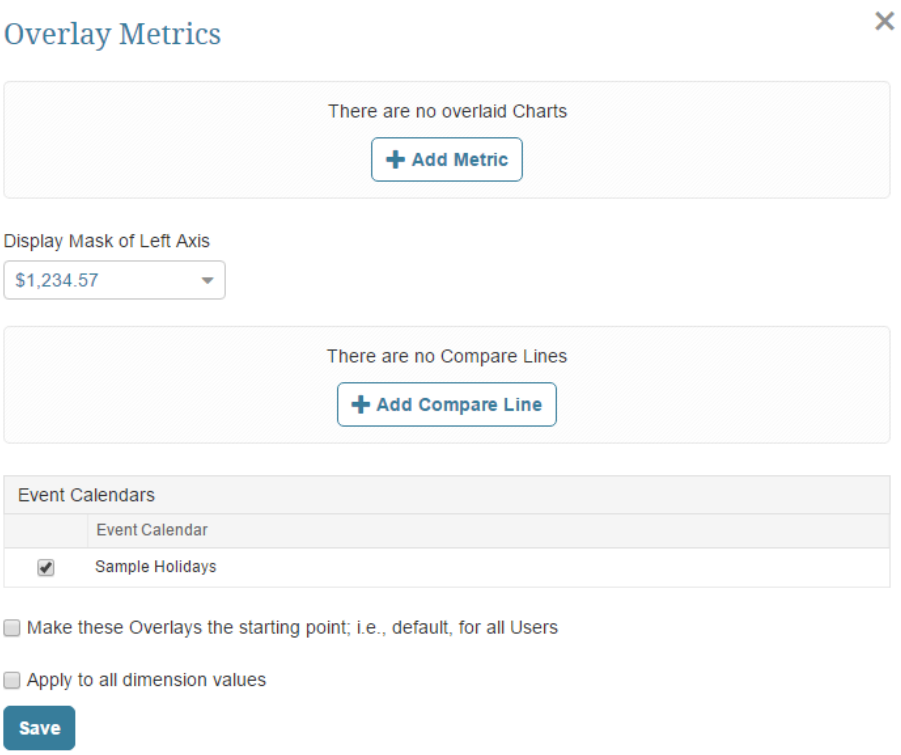
This section provides an overview of this feature, with links to provide more detail as needed.

1. Accessing Metric Overlays

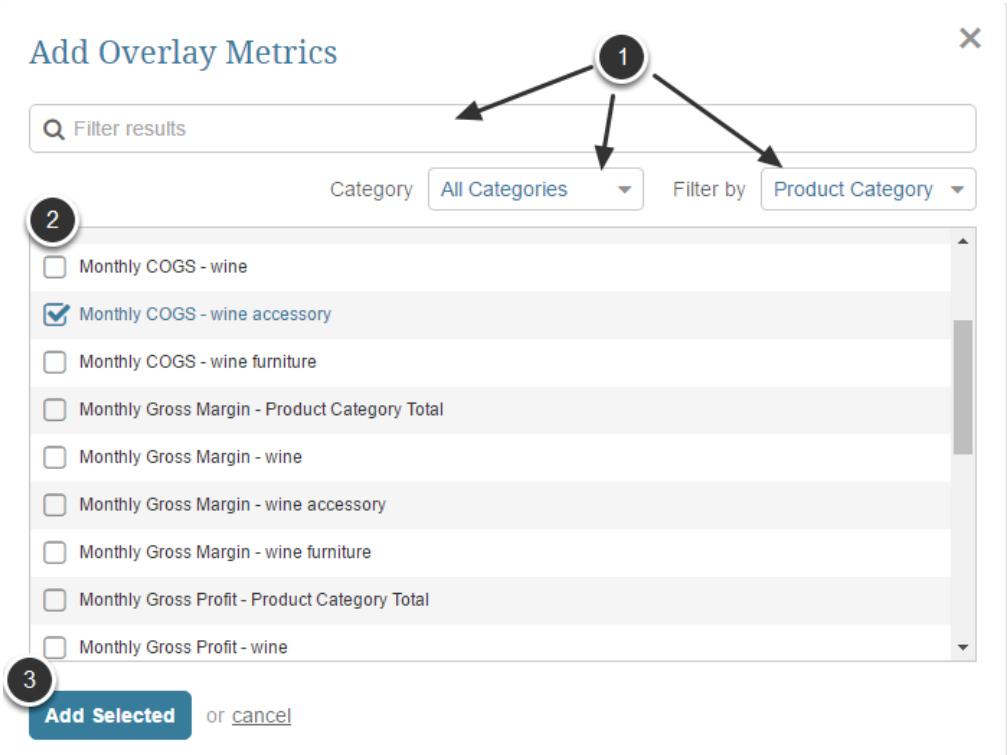


To add an overlay Metric to your Chart, click **Overlay Metrics** below the Legend of this Chart. The *Overlay Metrics* pop up opens.

2. Managing Overlays pop-up example



3. Adding Overlay Metrics



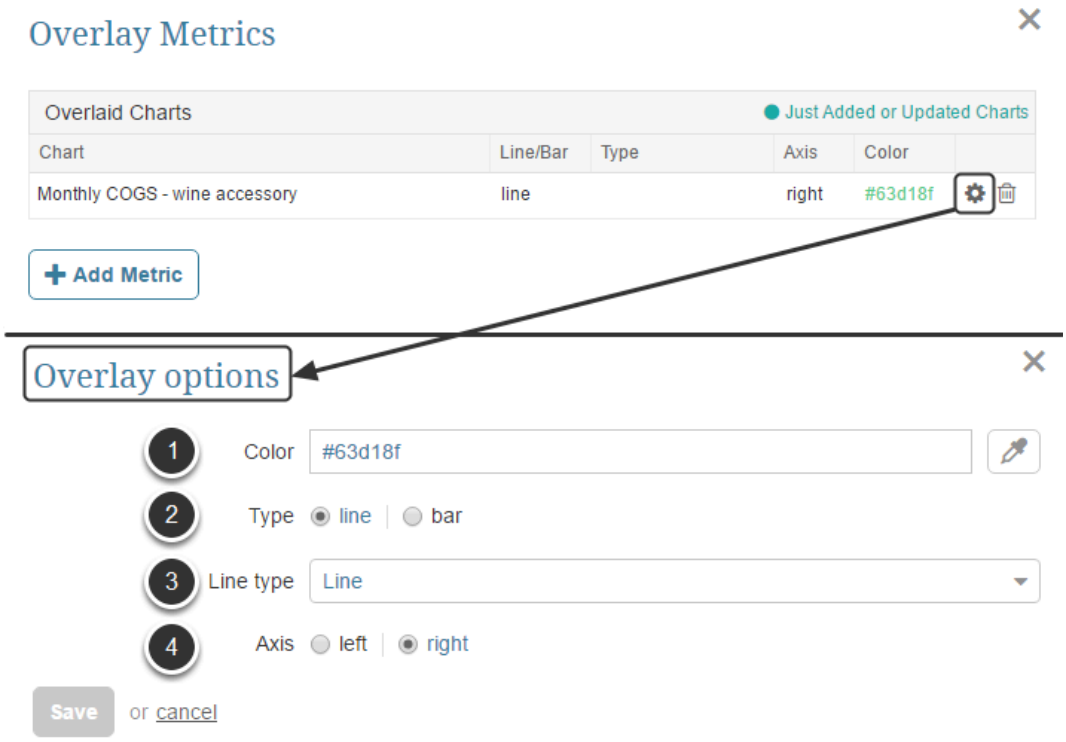
At the *Add Overlay Metrics* screen you can select one or several Metrics to be added to your original Metric

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



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.

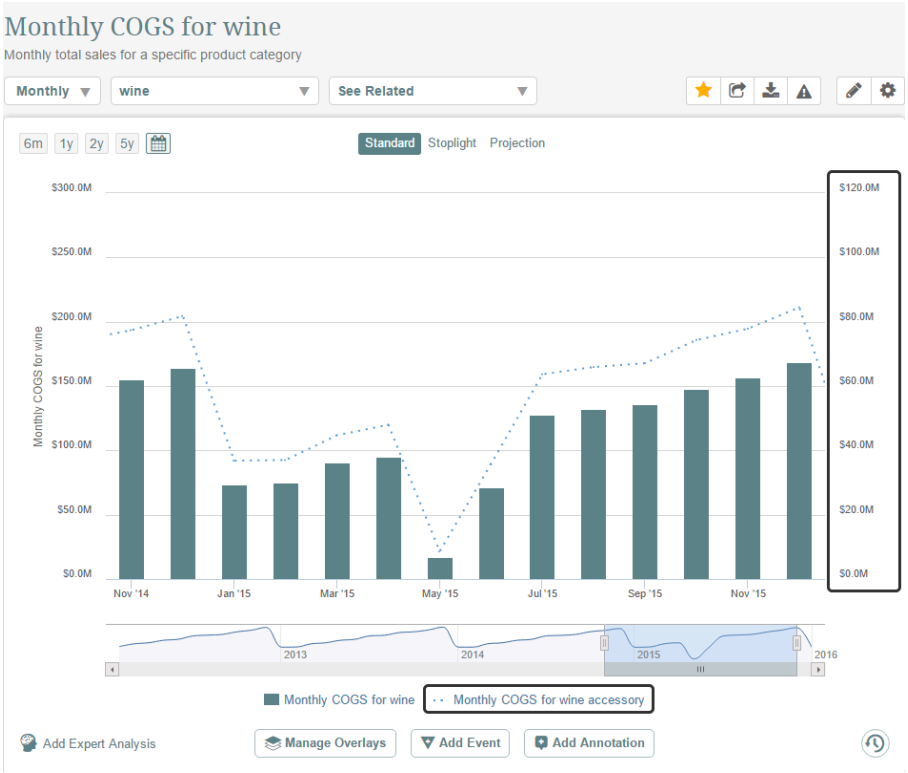
You can customize the look of the Overlay Chart by changing the following parameters:

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.

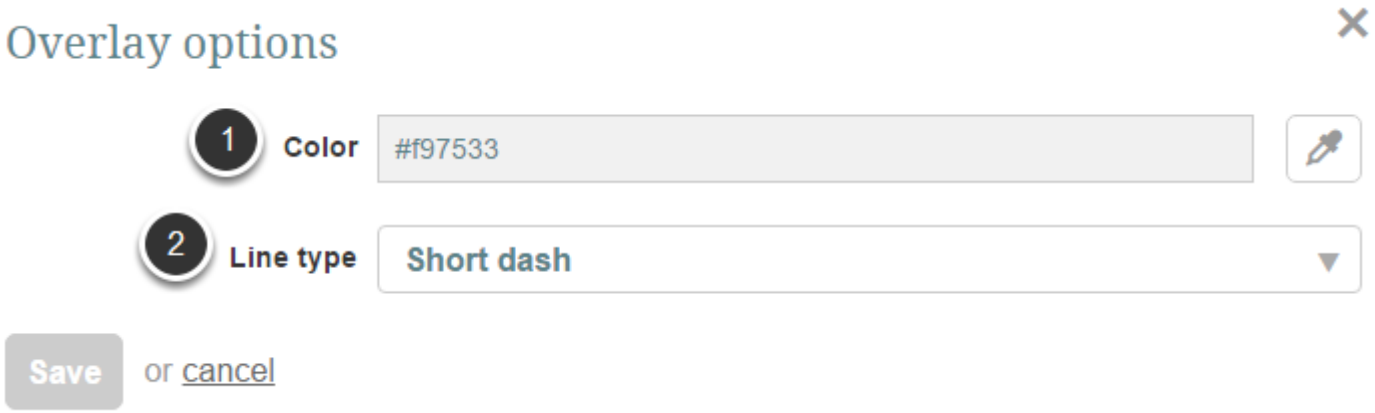
4. Adding Compare Lines to your Metric

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.

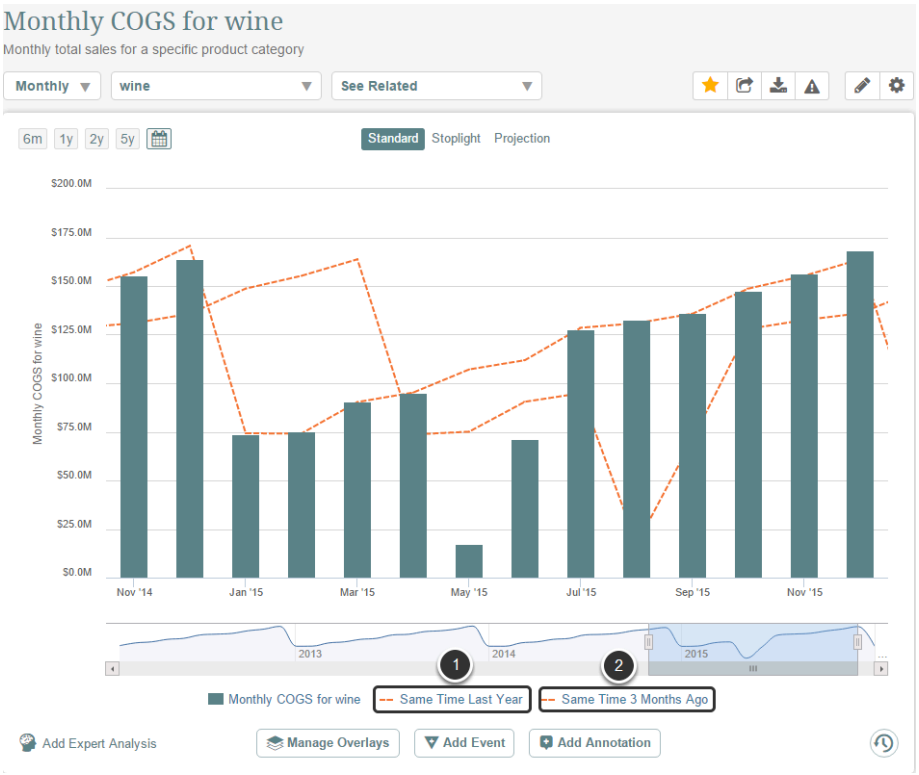
4.1. Editing Compare Lines



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

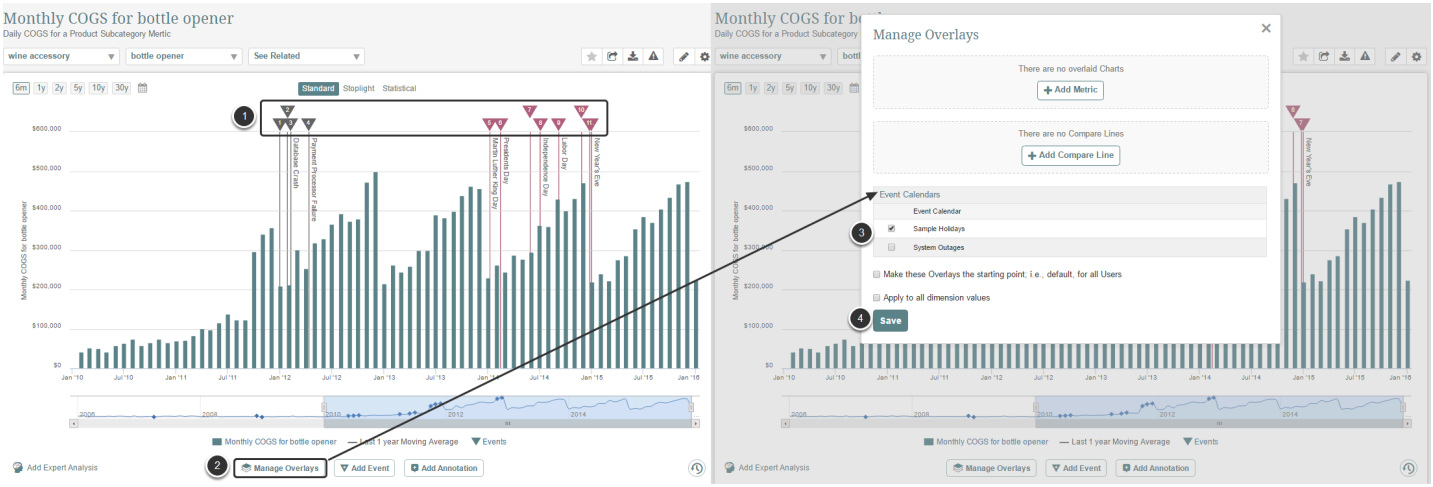


In the example above you can see a Chart with two Compare lines:

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

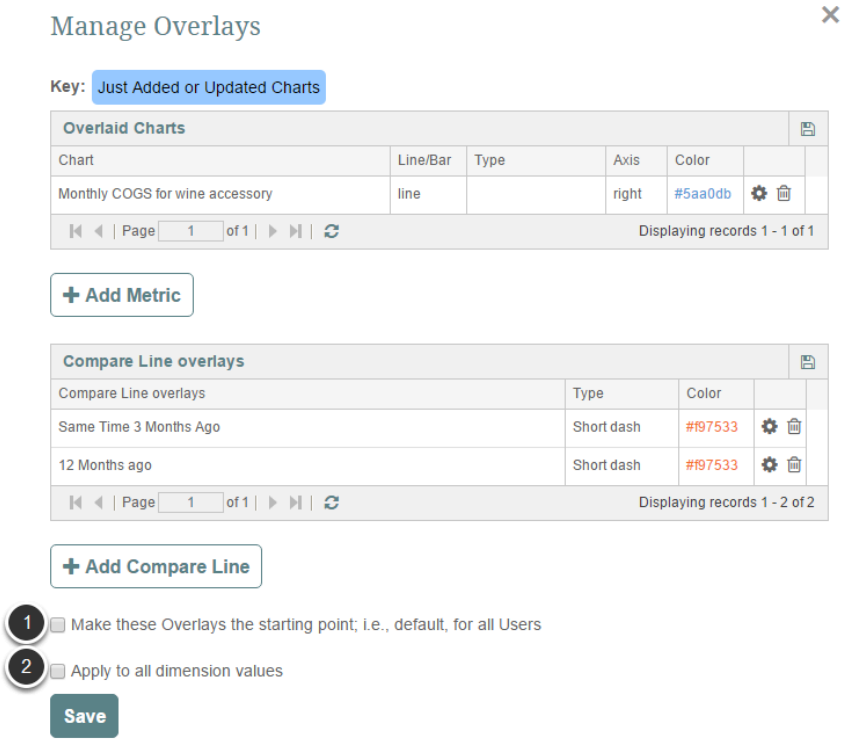
NOTE: To hide the Compare Line, single-click its Legend below the chart. When the Compare Line is hidden, its Legend is shaded.

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



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

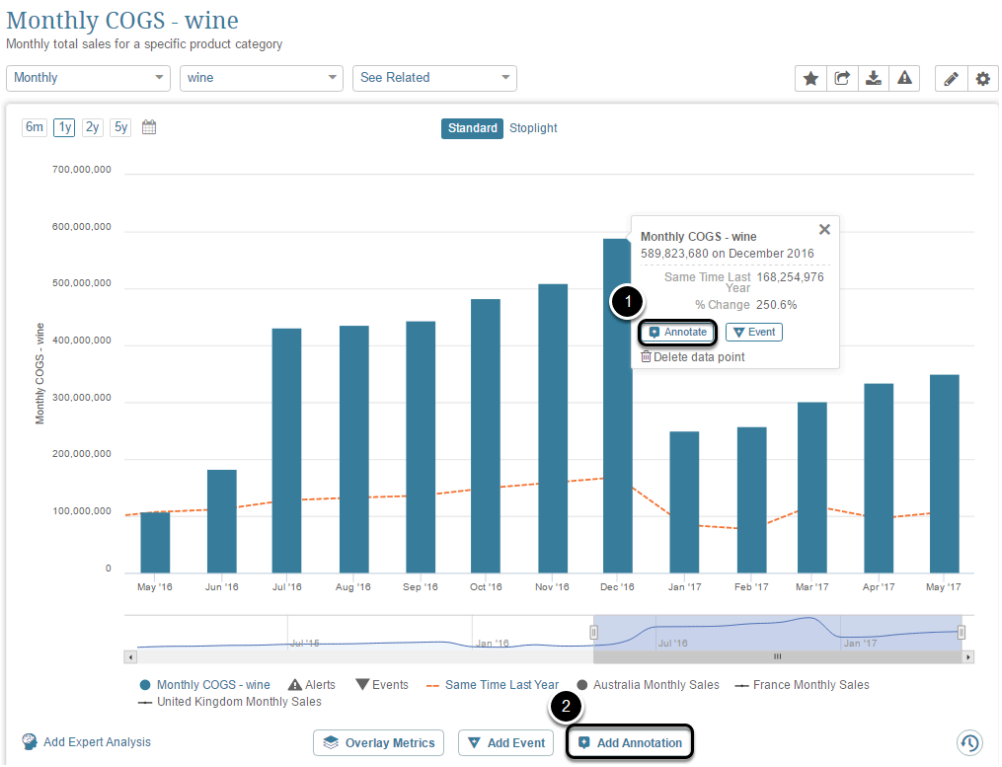
1. **Make these Overlays the starting point** - If this box is checked, all users, who open this chart are going to see added overlays.
2. **Apply to all dimension values** - If this box is checked, added overlays are going to be displayed at the charts of all dimension values. If the Metric is not dimensioned,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

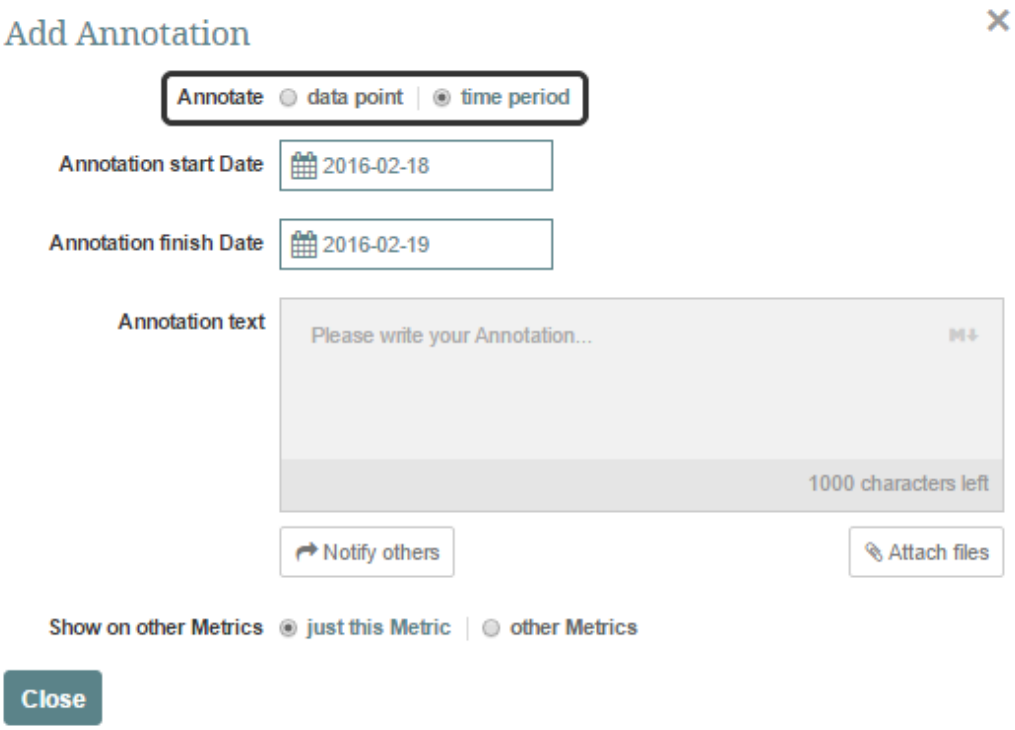


Access the **Add Annotation** pop-up by either:

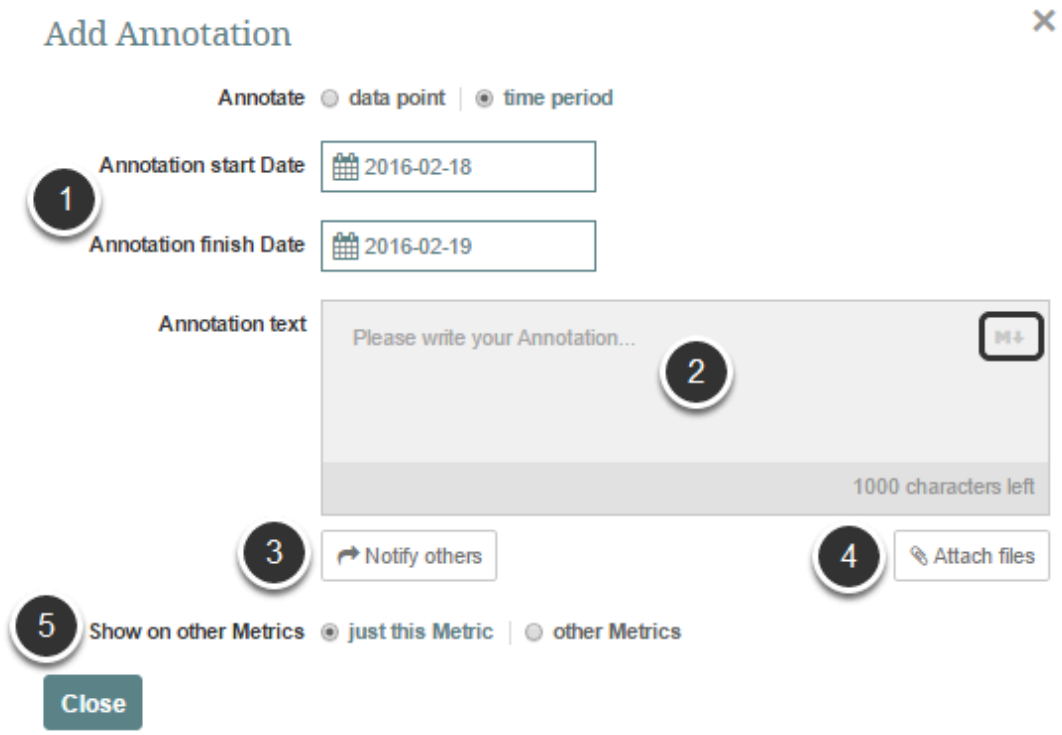
1. Clicking on an existing Datapoint > select **Annotate** button
2. Clicking on the **Add Annotaion** button beneath the Chart

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

'Time Period' option



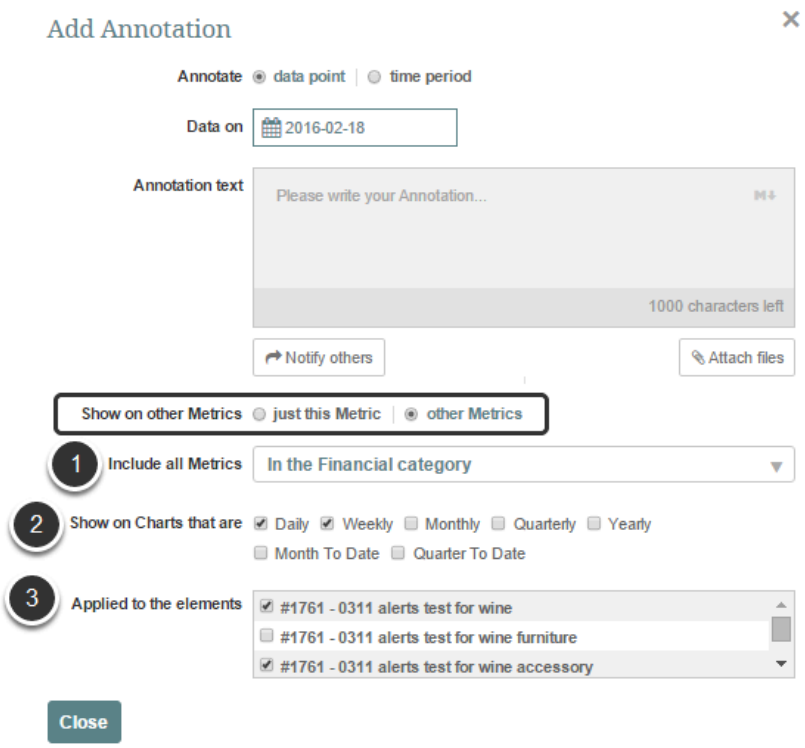
3. Provide the information required to create an Annotation



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

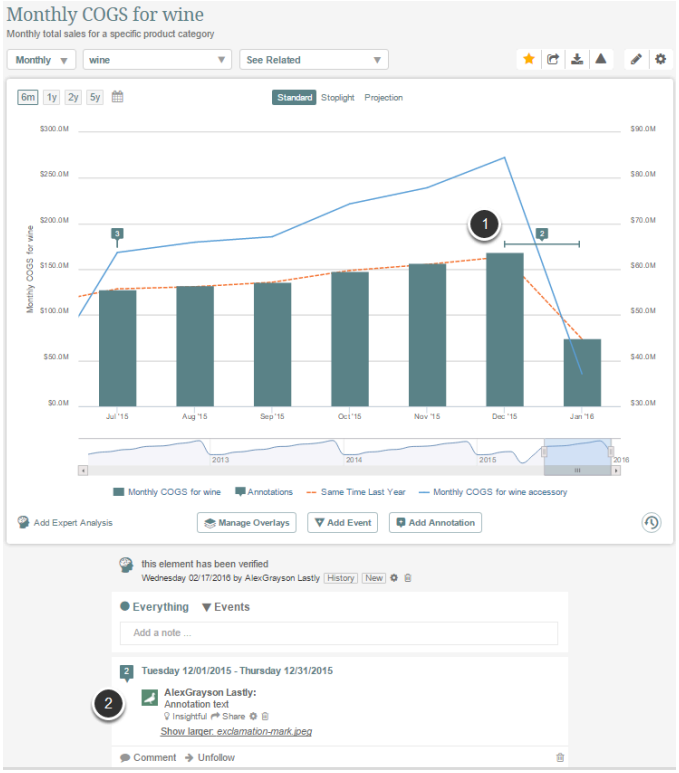
[NOTE] If other elements are affected, select them to add the same Annotation



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



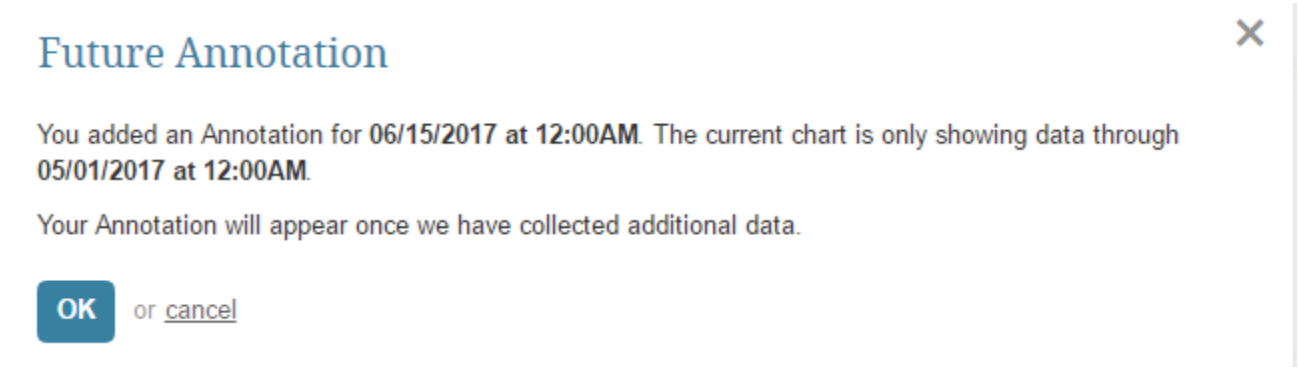
1. Annotation range is indicated on Chart
2. Details on annotation appear below the chart allowing others to comment on your annotation

Adding Annotations for future dates

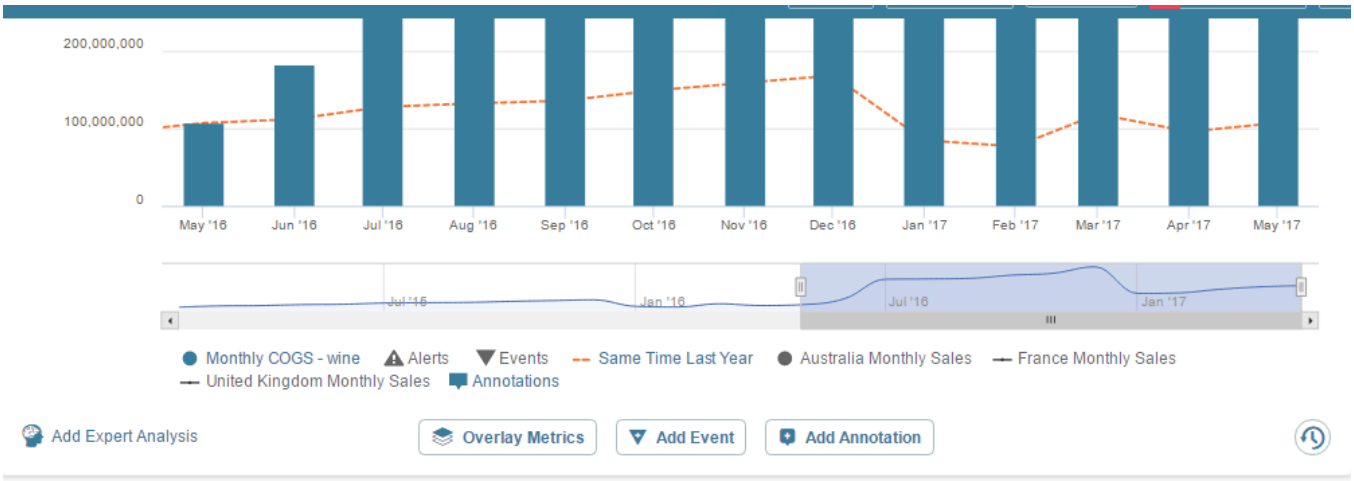
Users can easily add Annotations for a Metric's data points for which data has not been collected yet. This is helpful when a user knows something will be happening during the current or future period. The annotation will appear on the Chart and at the *Homepage* > *News View* when data is collected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

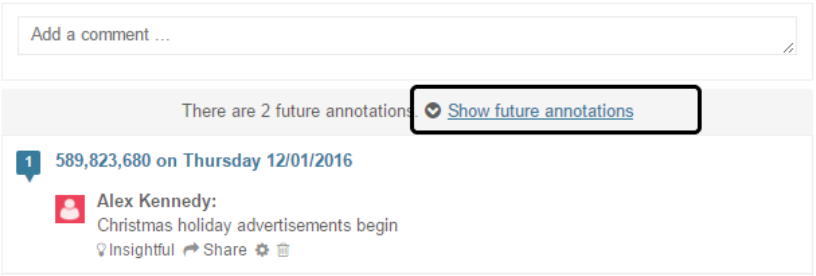
NOTE: Display of **Future Annotations** is controlled based on the last data point collected, regardless of how OLD that data is.

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



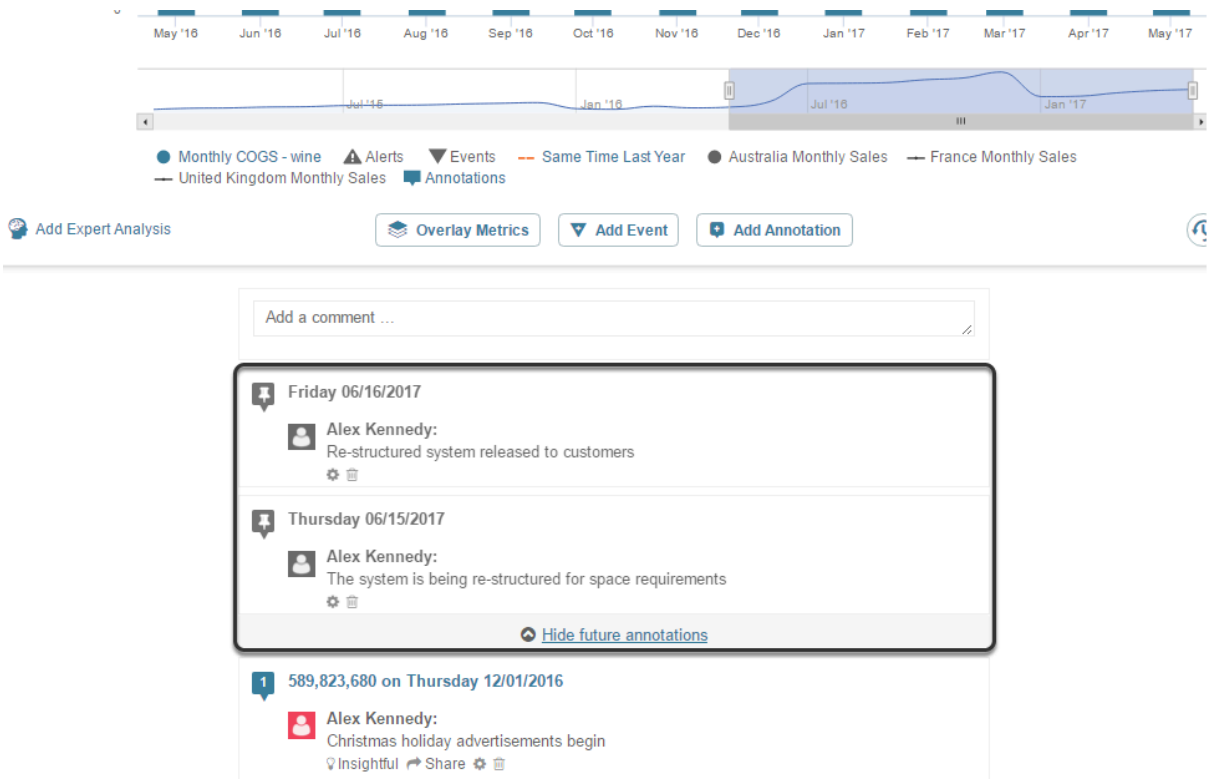
Viewing future Annotations below the Chart





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

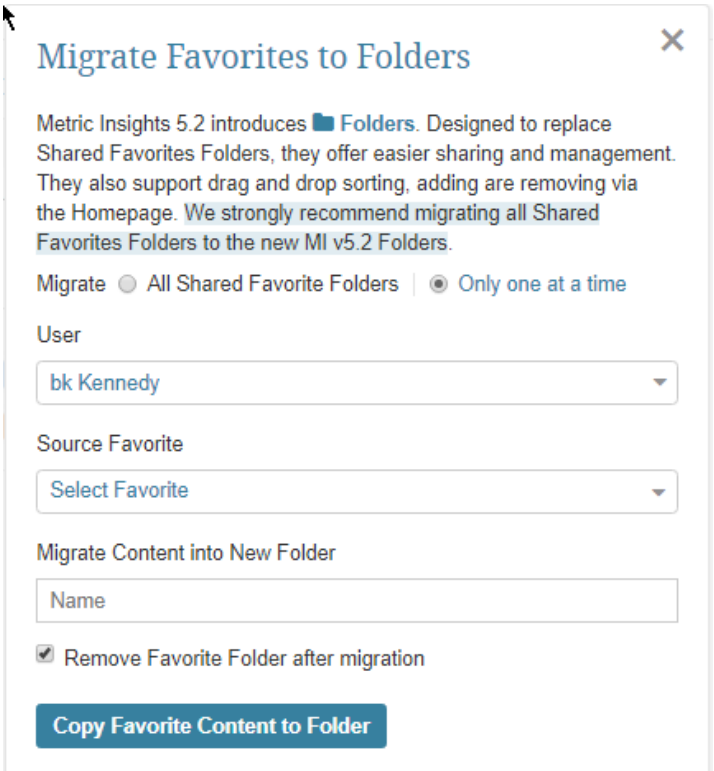
With Release 5.1, Metric Insights offered Favorites, Shared Favorites, Bursts, and Standard Notifications (Immediate, Daily, Weekly, Monthly).

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

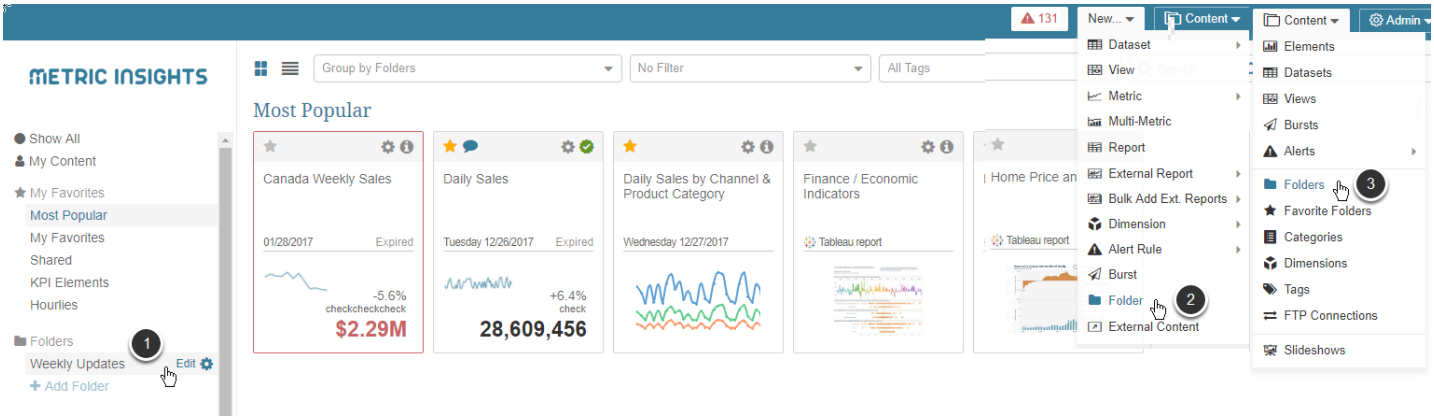


- Users receive their default “My Favorites”
- Users can also create additional personal Favorites
- Users can NO LONGER share their personal Favorite Folders
- Using the path Admin menu > Utilities > Migrate Favorites to Folders, Admins are provided with a migration utility to convert existing Shared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

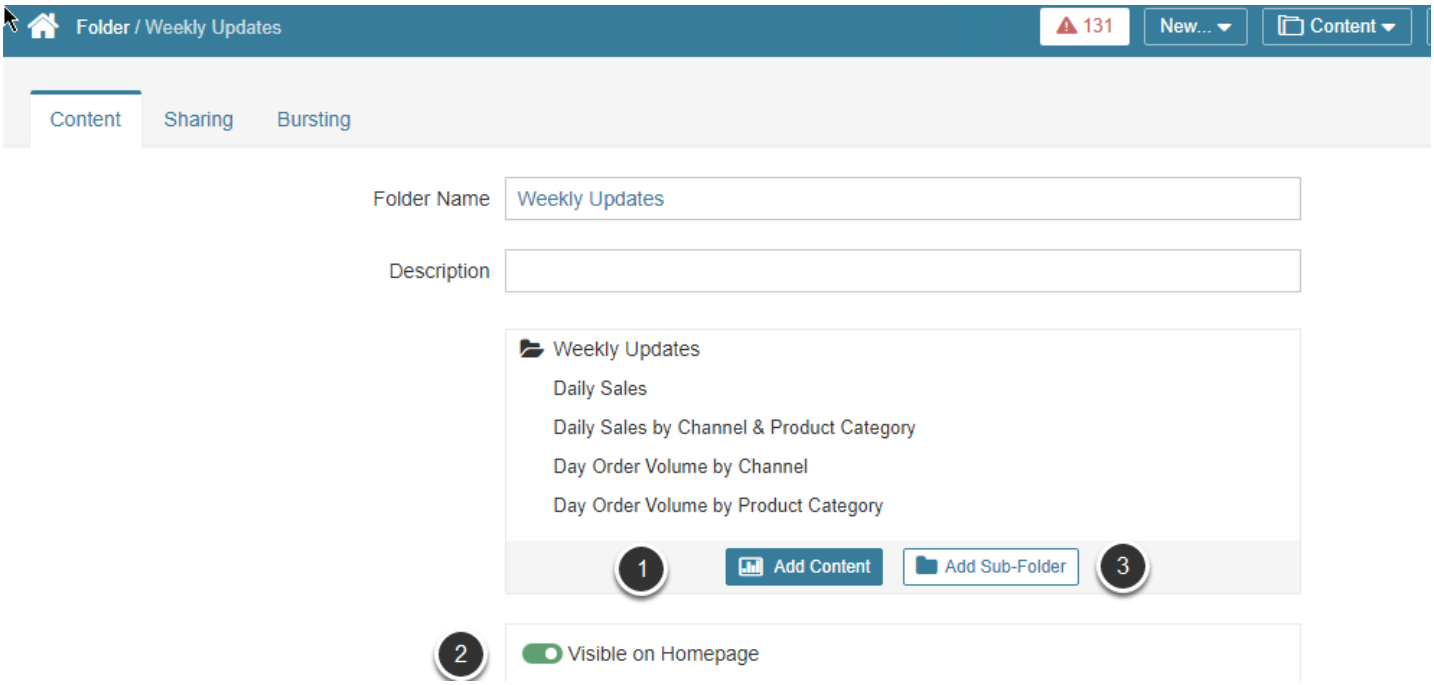
Key Feature Capabilities

- **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 Bust 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



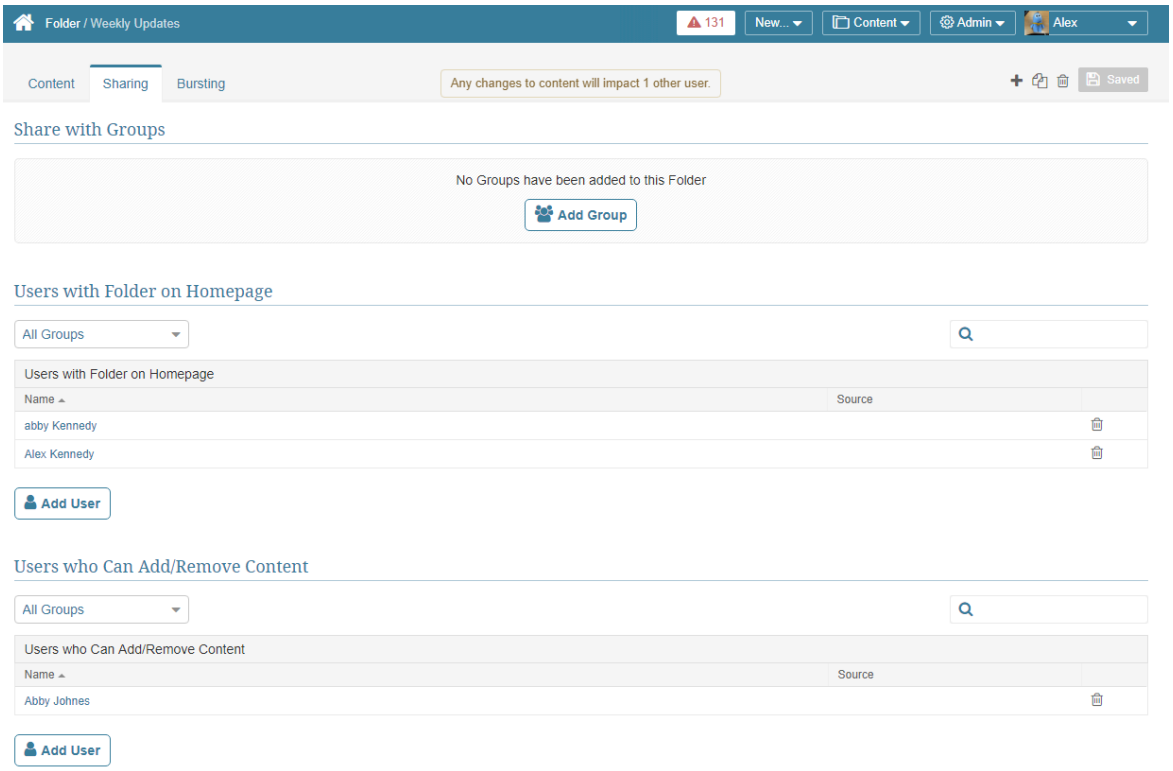
Access via Edit gear on Homepage, or New>Folders, or Content>Folders



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

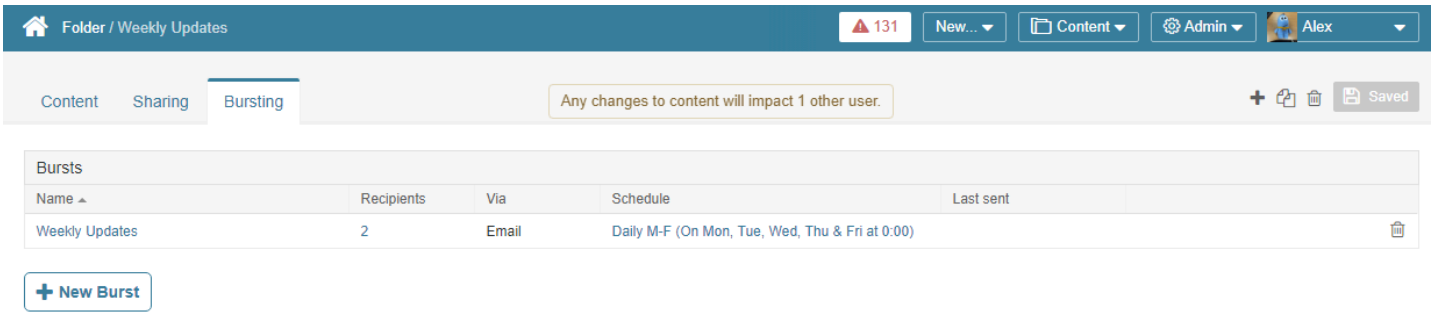
Content Tab - allows users to:

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



Sharing Tab is used to:

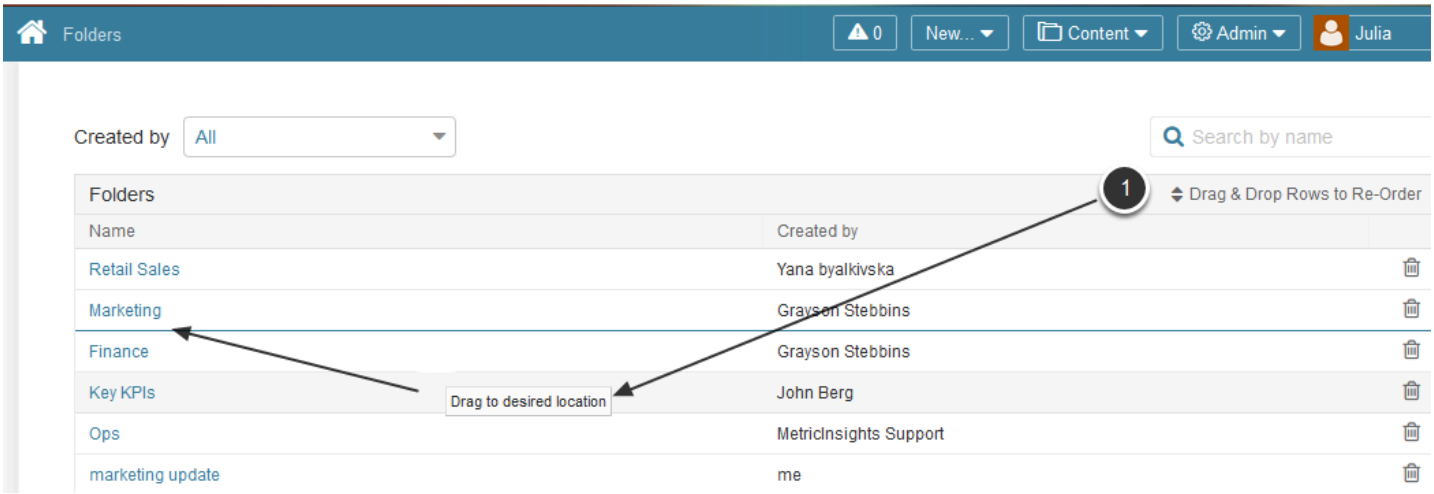
1. Specify Users or Groups that can see the Folder on their Homepage
2. Specify Users or Groups that can Add/Remove its Content (i.e., Edit Access):



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)



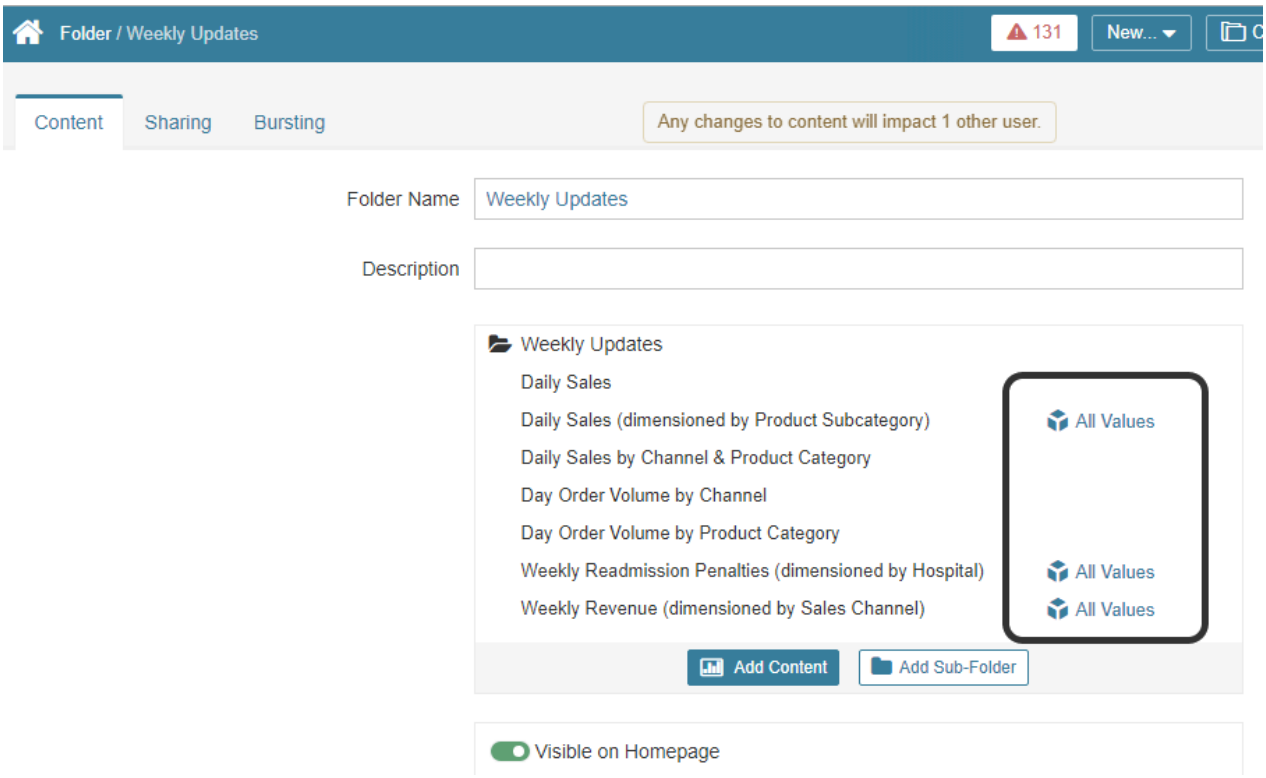
Access via Content > Folders to get list of existing Folders

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 to added to the bottom of Folder display
3. This display order is set for all Users

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



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

- **G**roups 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).

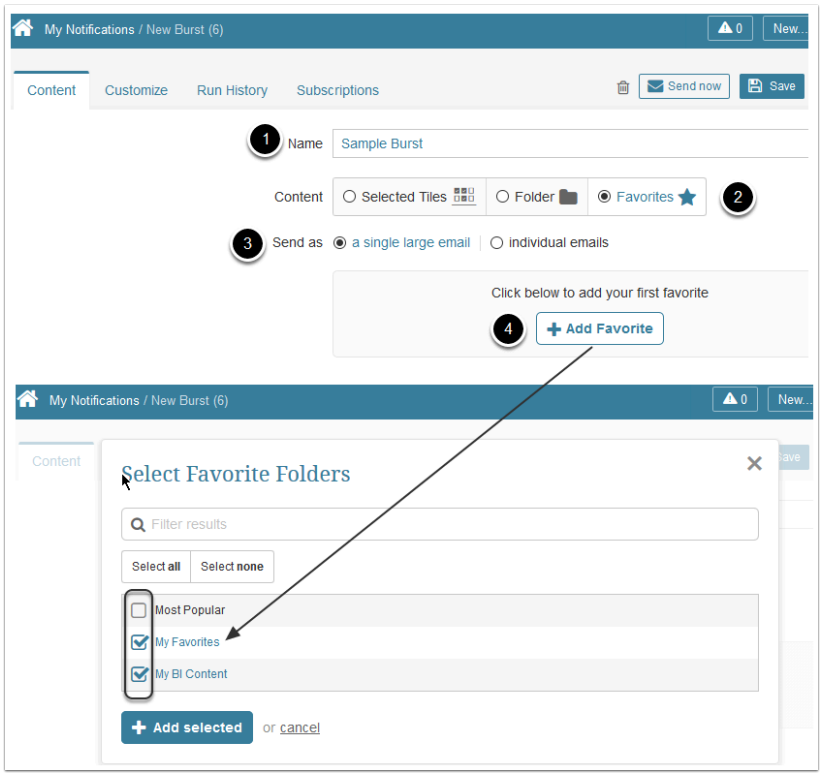
1. Access New > Burst

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



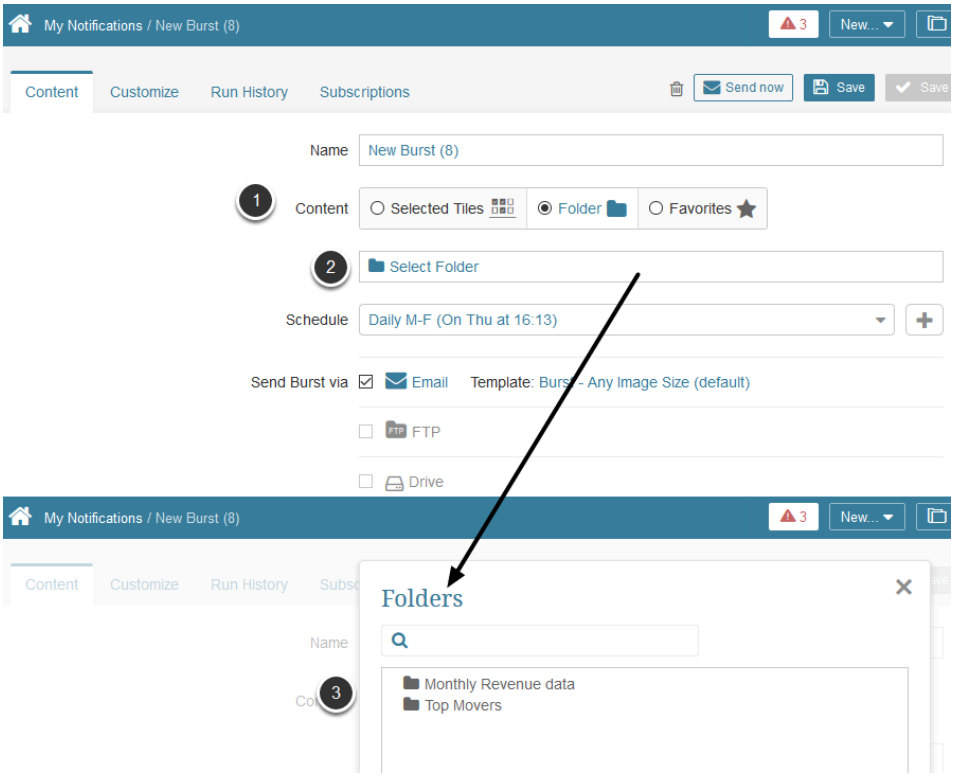
Select your content by adding elements from your Favorites folders:

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.

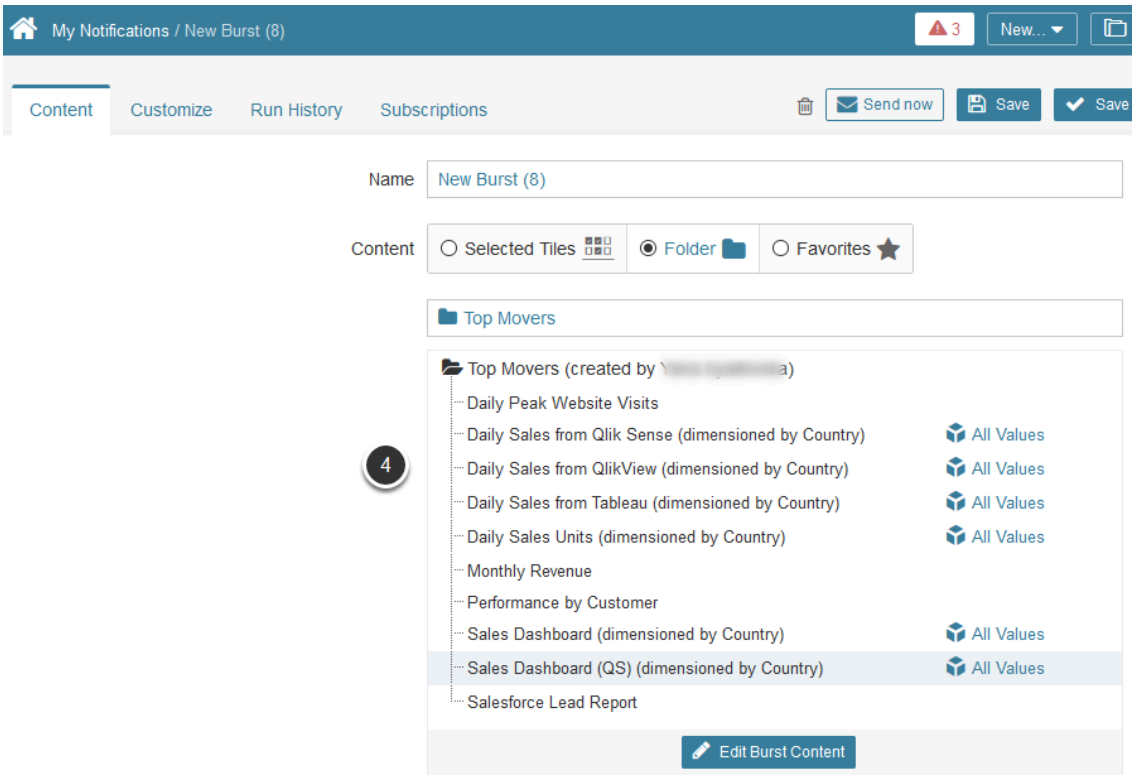
Once done with selection, click **[+ Add selected]**.

> 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]

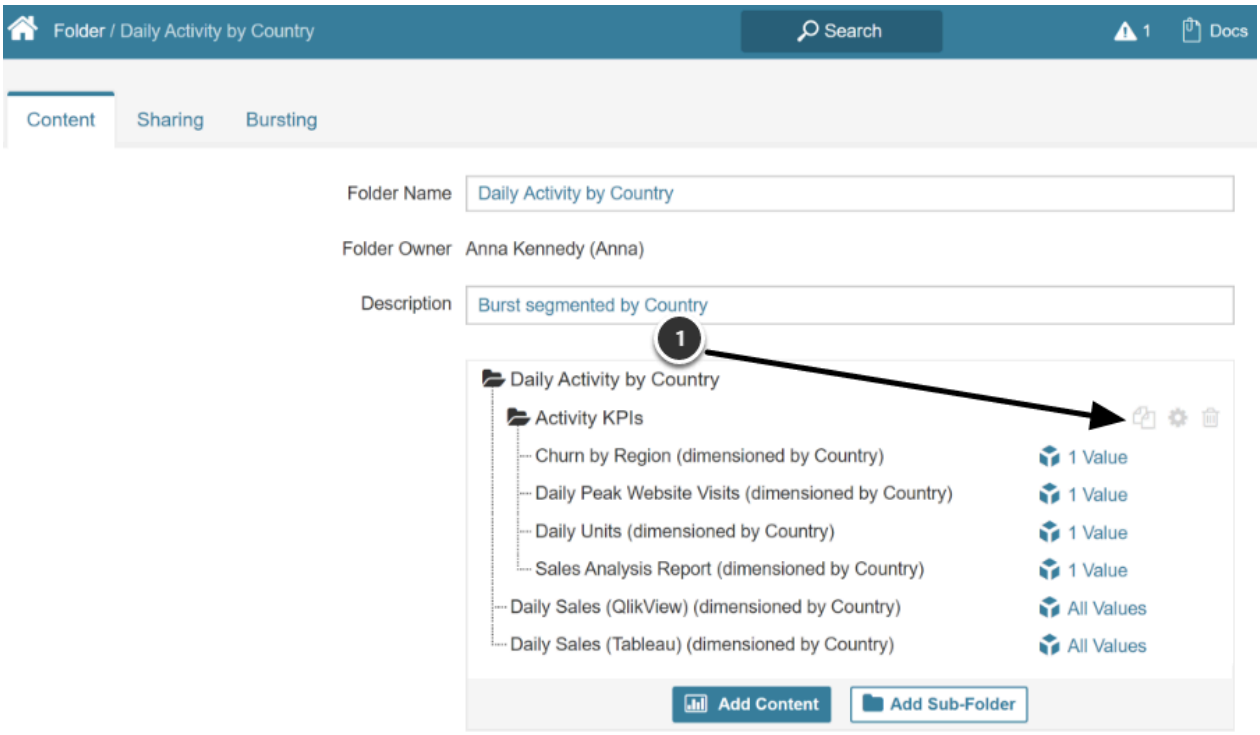


1. Select '*Folder*' in the **Content** field
2. Clicking on '*Select Folder*' will open a list of Folders that are visible on your Homepage. Admin Users will have choice of all Shared Folders created, not just the ones that are shared with the Admin User
3. Select a single Folder by clicking on the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

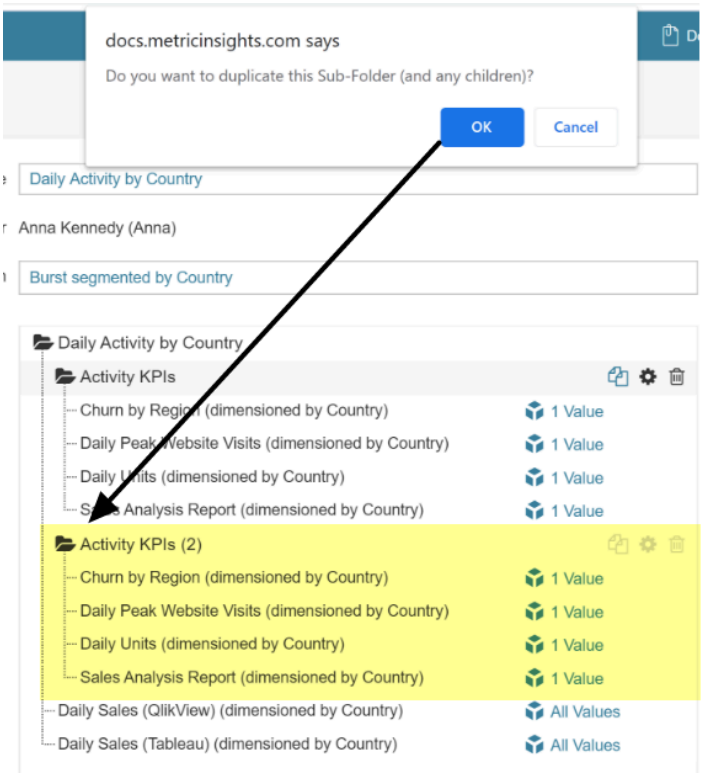


1.2.1. How to duplicate a Sub-Folder for Bursts

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

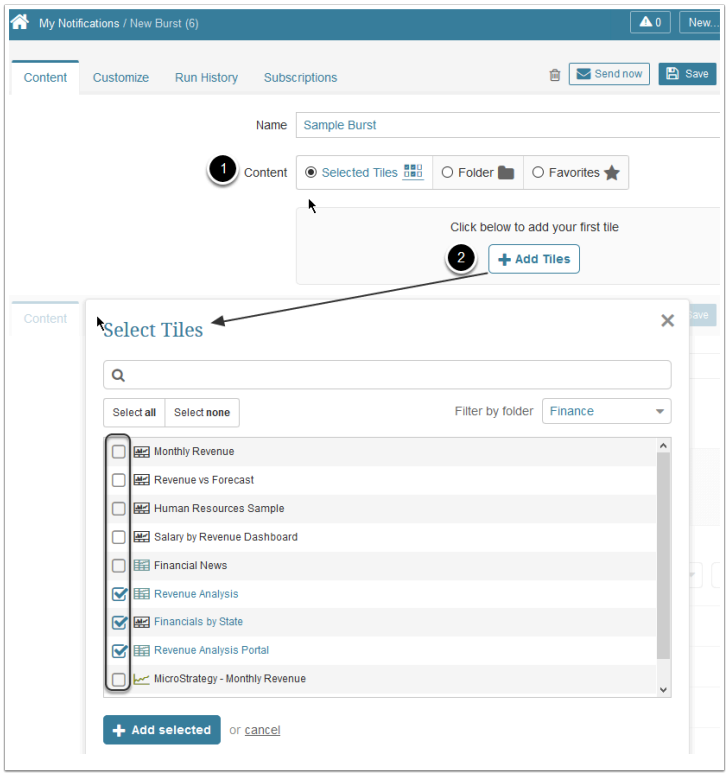


1. Select the duplicate icon to open a confirmation notification and click "ok" to duplicate the sub-folder



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.

1.3. Content: Selected Tiles

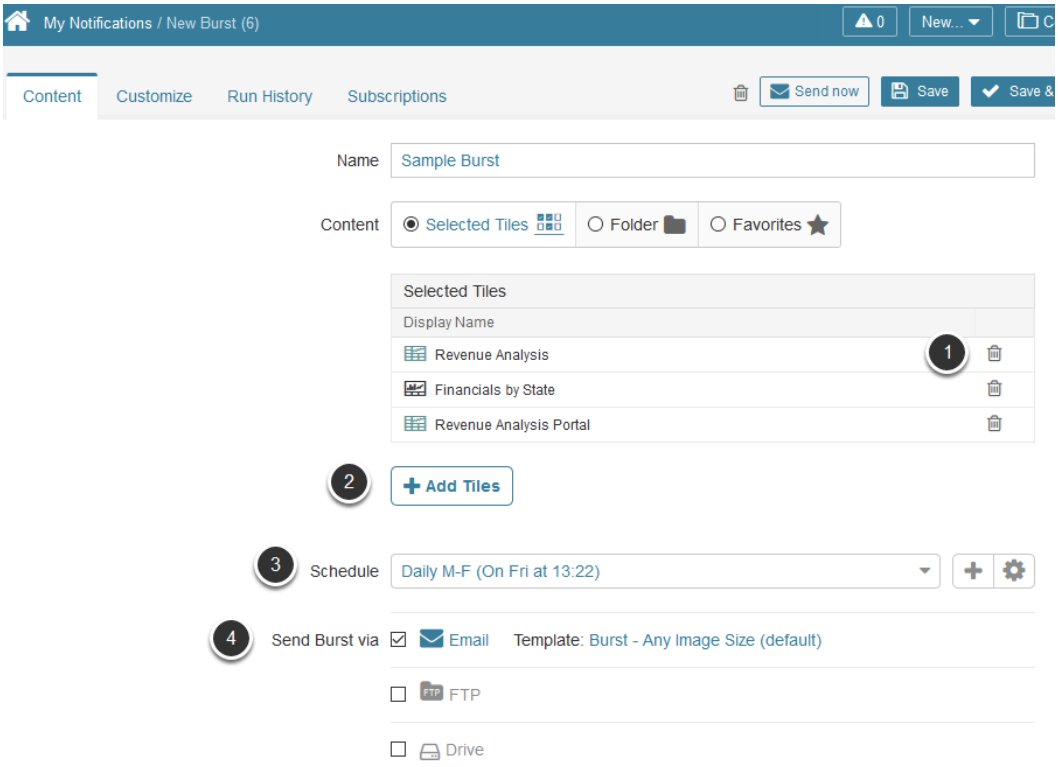


1. We recommend providing a meaningful **Name** to your Burst, since it is going to be used as an email header once notifications are sent.
2. If you choose to add specific tiles into the Burst email, click **[+ Add tiles]** and in the opened pop-up choose which of the elements are supposed to be included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

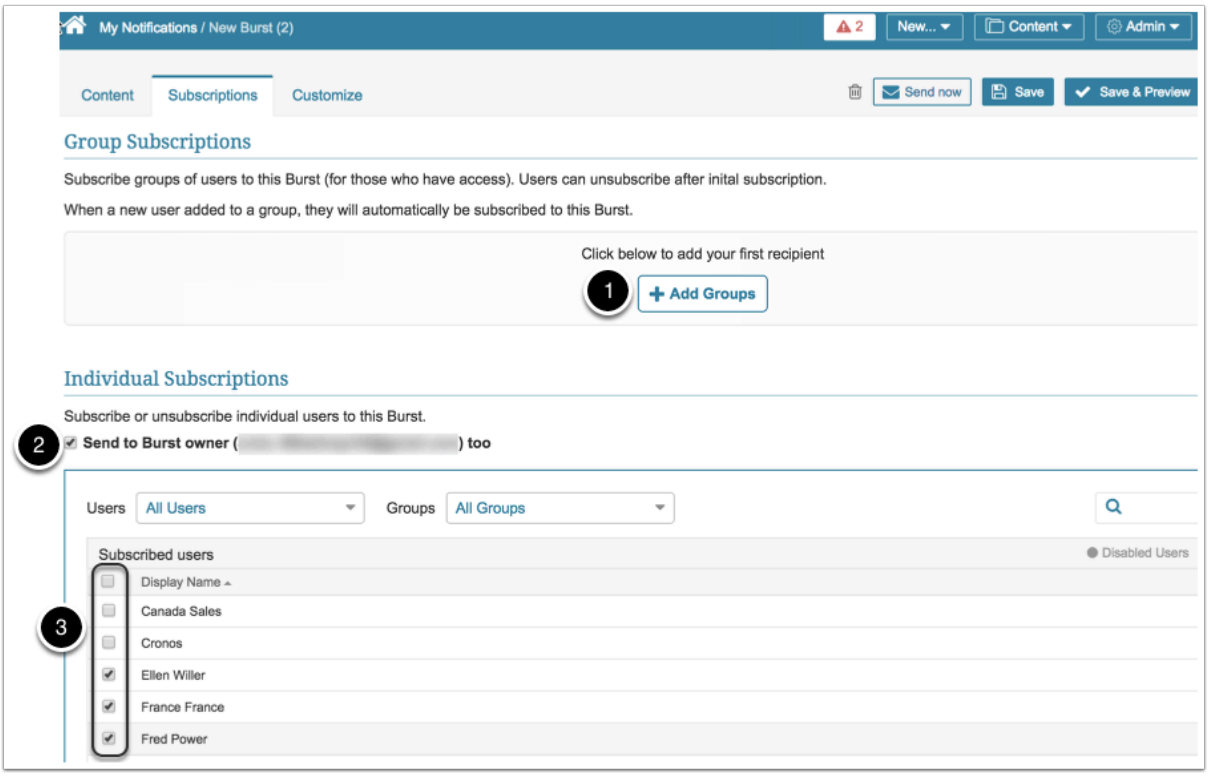
Once done with selection, click **[+ Add selected]**.

2. Your selections will be displayed in the list below



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

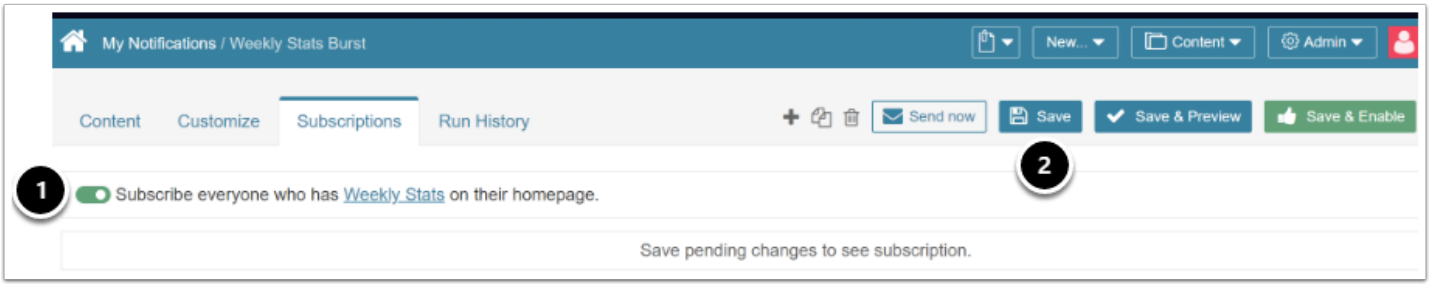
3. Define Subscriptions by Groups or individual Users



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.

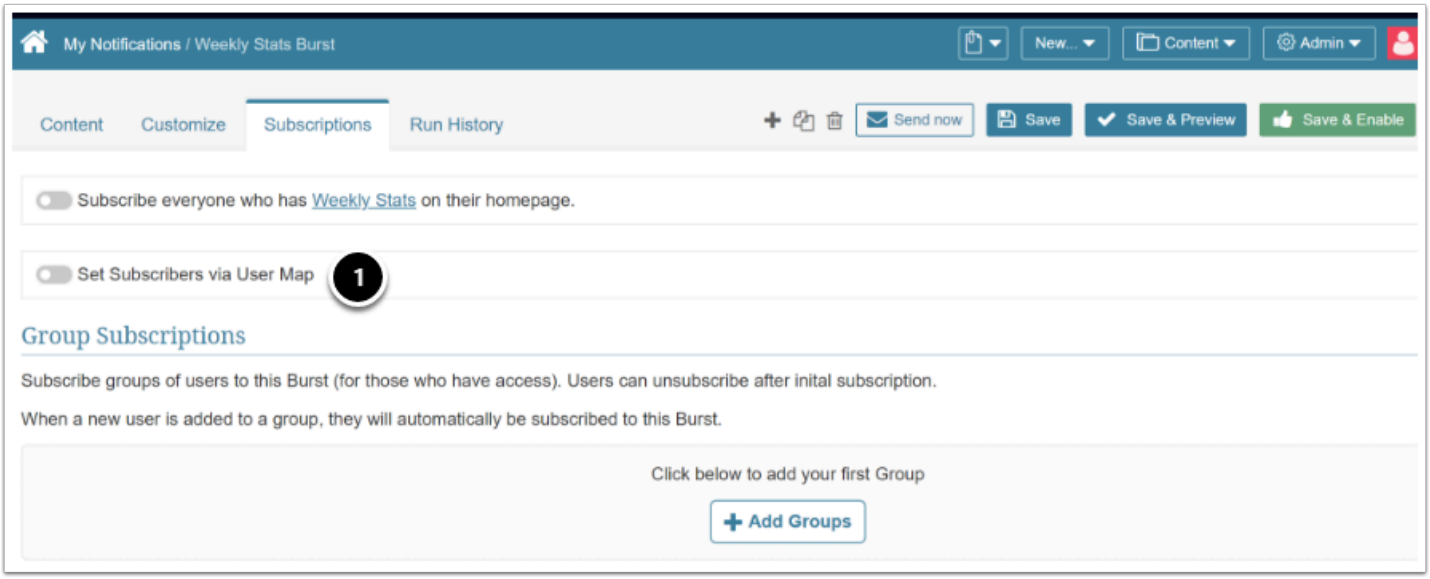
3.1. Define Subscriptions via a User Map - new in 5.5.1

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.

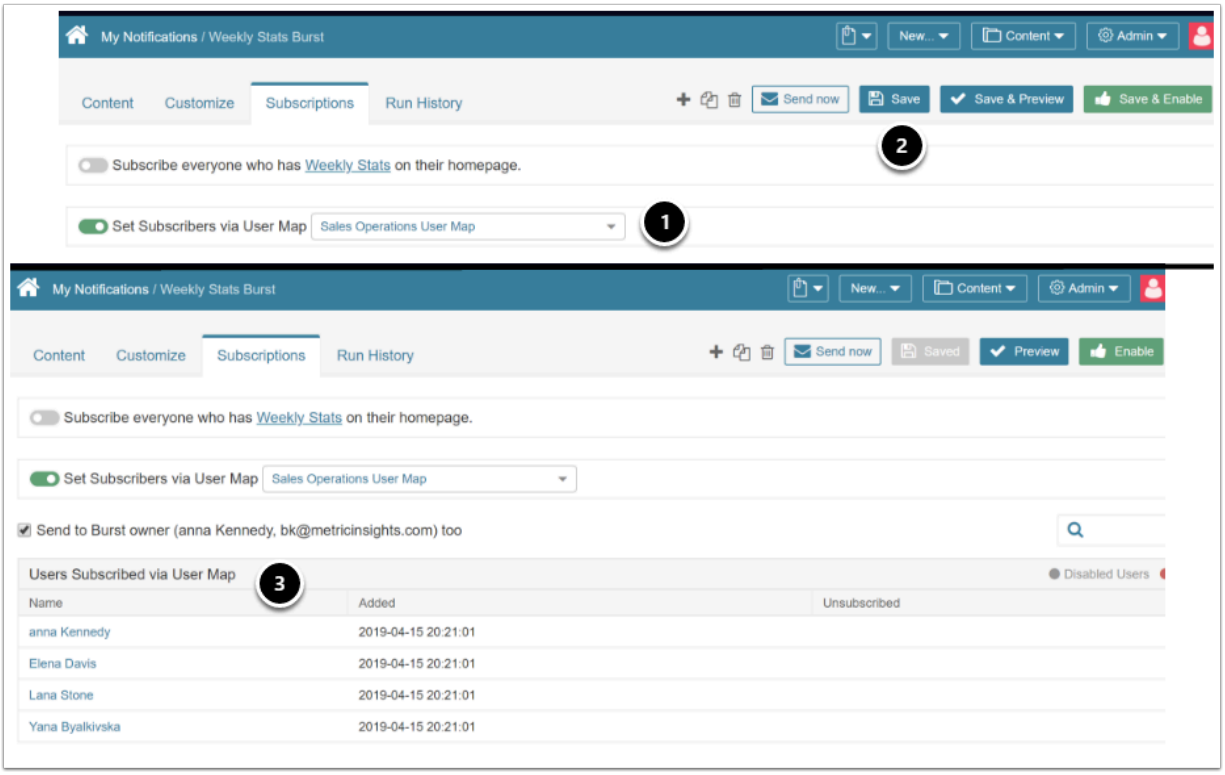


If your Subscriptions tab defaults to 'Subscribe everyone who has *xx* on Homepage:

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



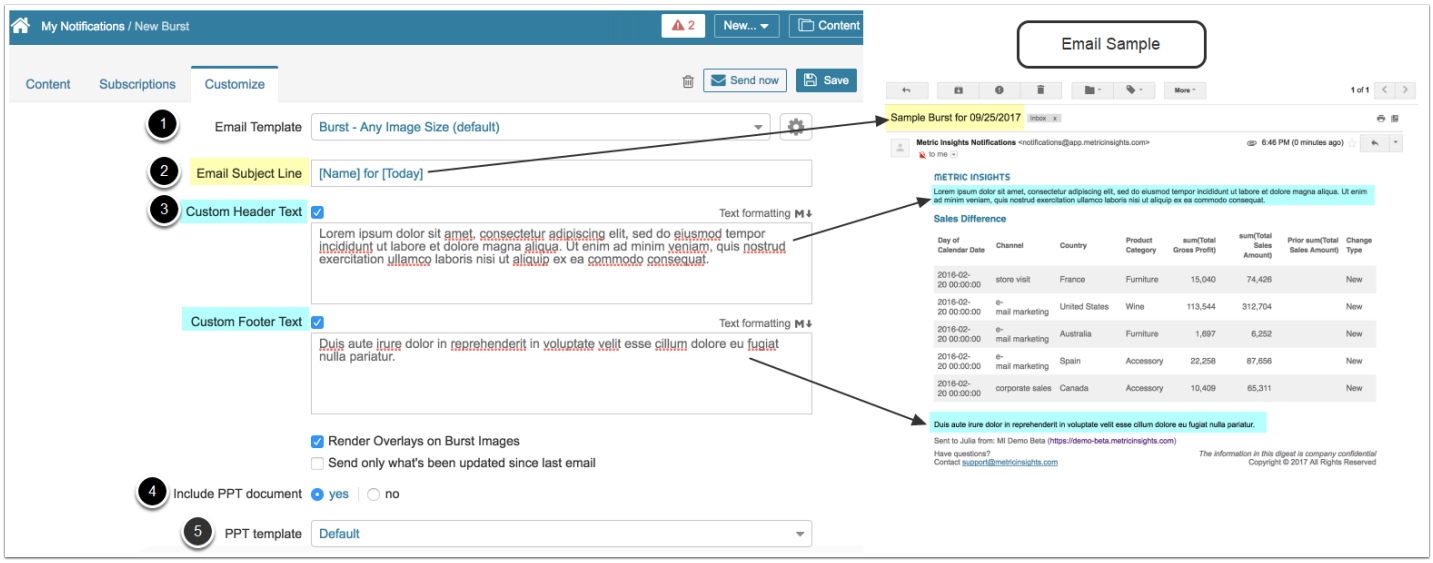
1. Toggle the 'Set via User Map' to ***ON***



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



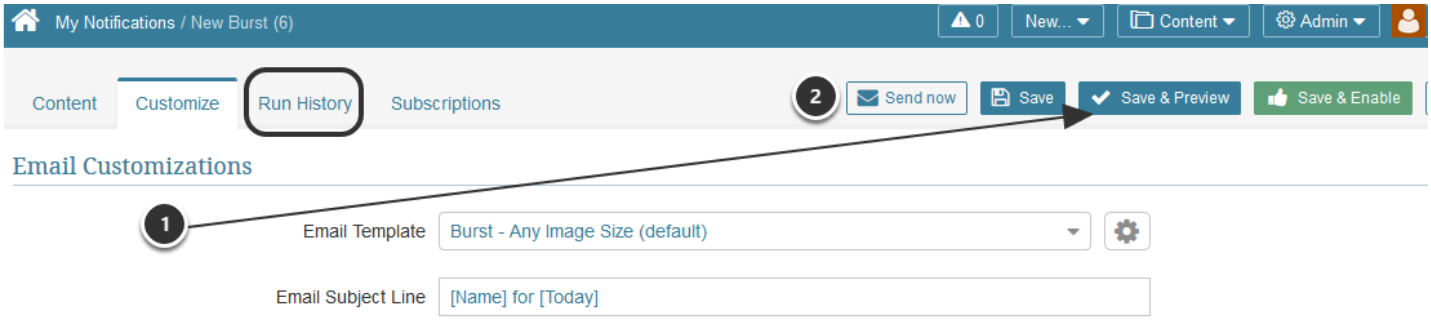
1. **Email Template:** a default Burst's email template is "Burst - Any Image Size"; it was designed as a standard and flexible solution. You are free to add your custom template to a Burst by:
   - First, adding it to *Admin* > *Email Templates*;
   - Secondly, choosing it from this drop-down list.
2. **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
   ```

3. **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.
4. **Include PPT document:** choose whether an attachment with a PowerPoint Presentation should be added to an email.
5. Optional, create a new PPT template:

```
https://yourcompany.metricinsights.com/editor/ppt
```

5. Enable your Burst

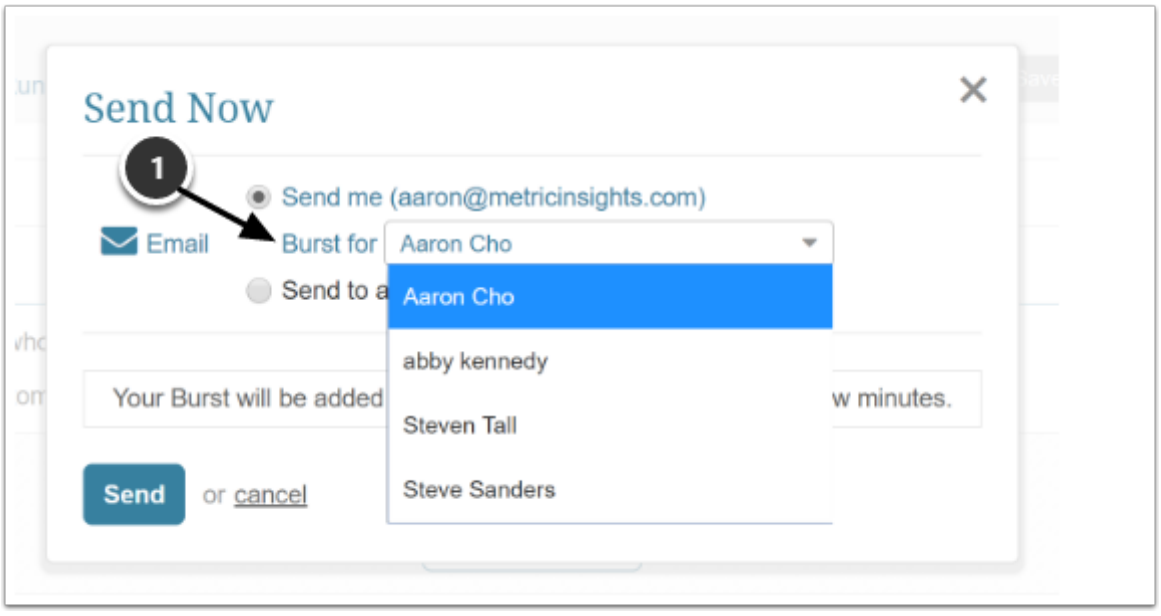


1. At the upper right corner of the screen click **Save & Enable**.
2. Optionally, you can request to [Send now] - see Step 5.1

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

> 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

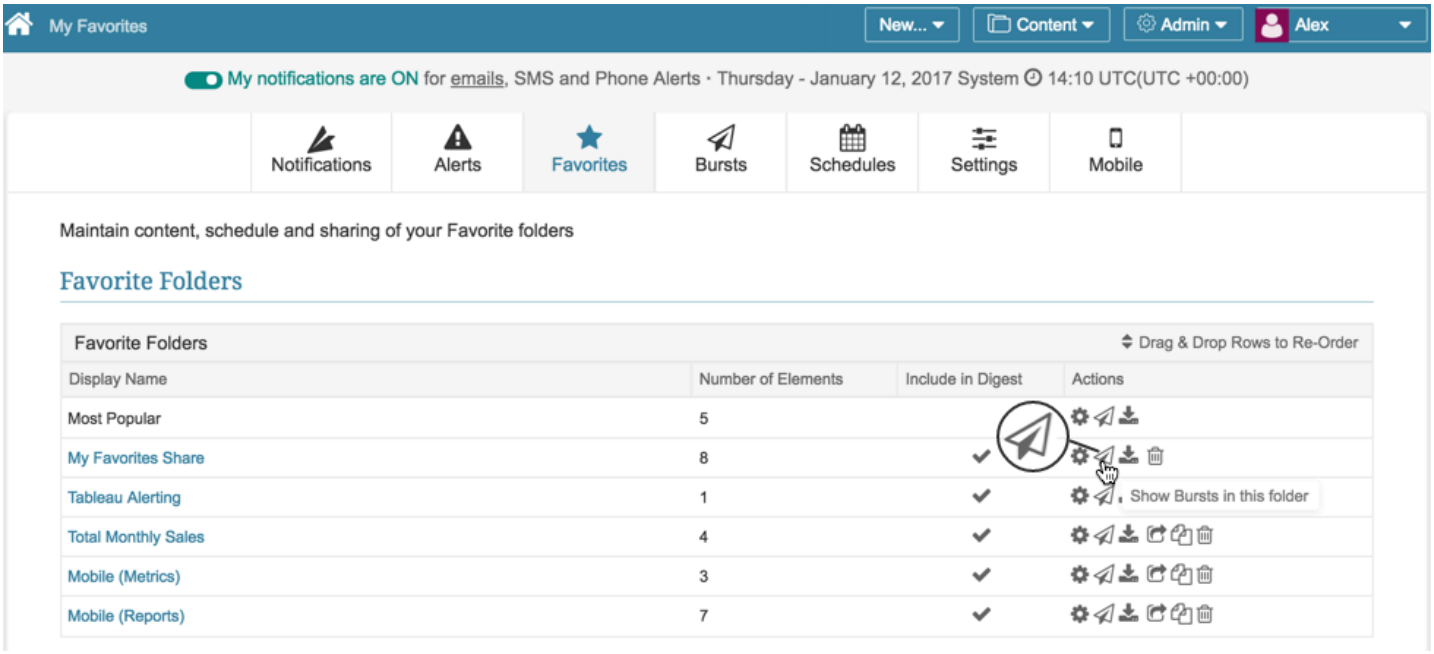


1. [5.6.1] This new options allows you to setup Bursts for others and then verify exactly what these Users will receive. Open the ***Burst for dropdown*** and select a Subscriber other than yourself. You will receive the Burst immediately, tailored for the selected Viewer - the system will apply any 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

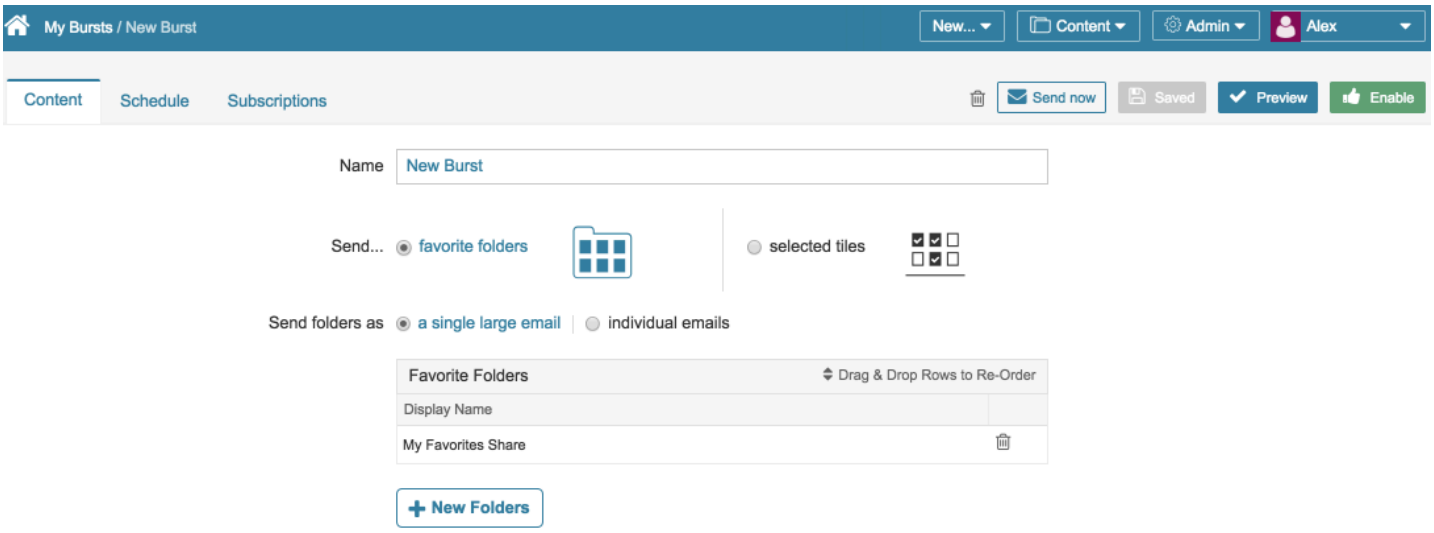


In the respective row click **Show Bursts in this folder** icon.

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

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

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

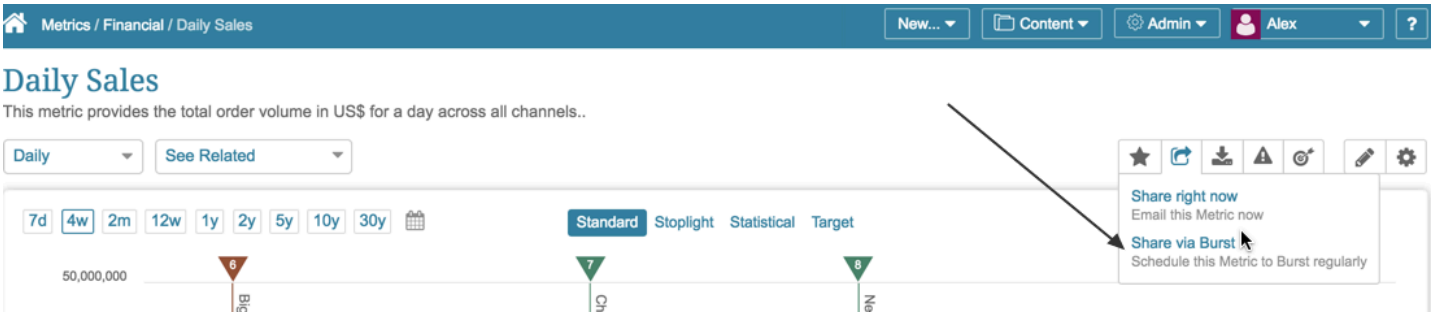


For complete steps, see: [Setting up a new Report Burst]

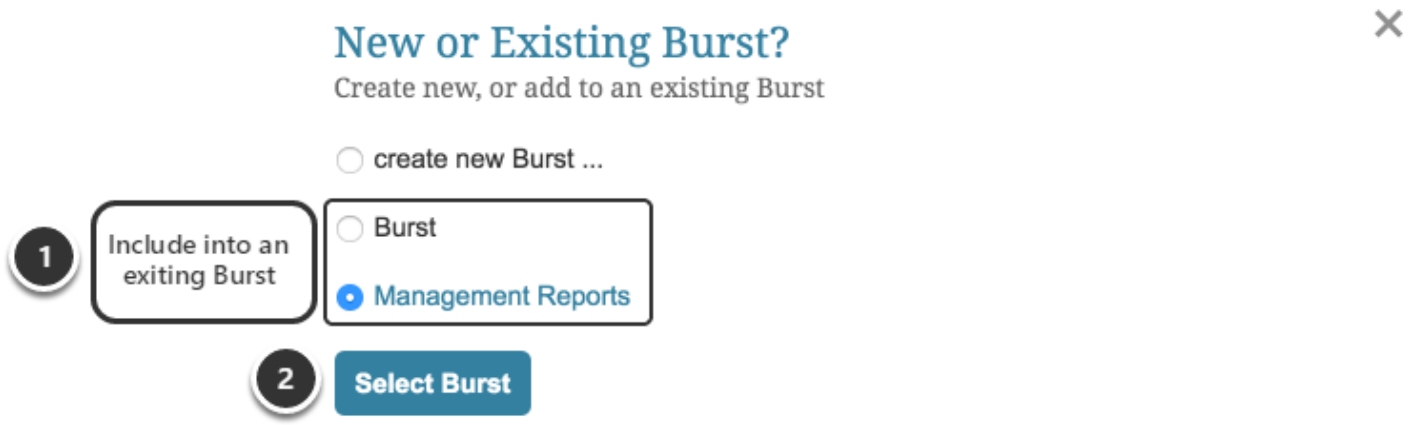
5.4 Bursting from the Report or Metric Viewers

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



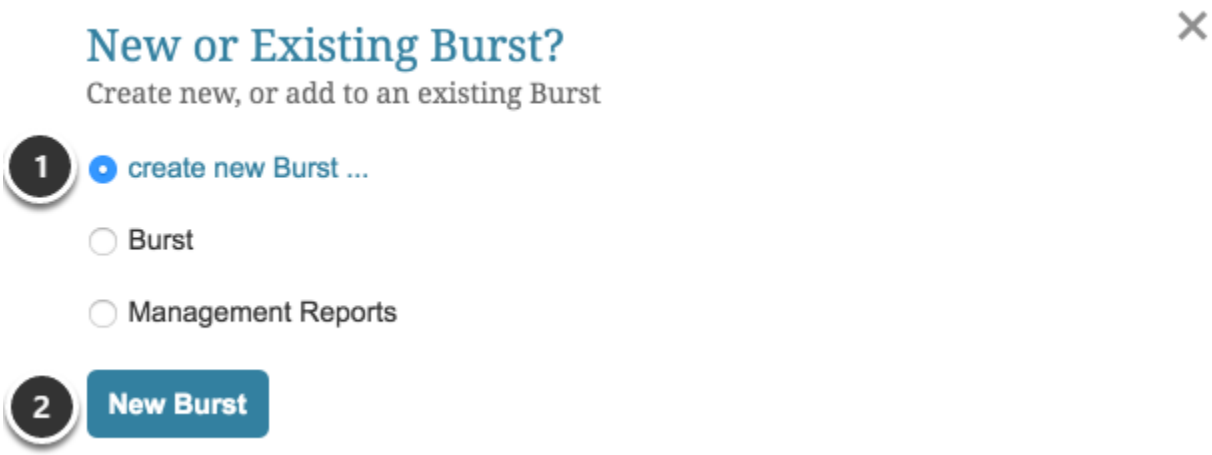
2. To add to this element to an existing burst



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

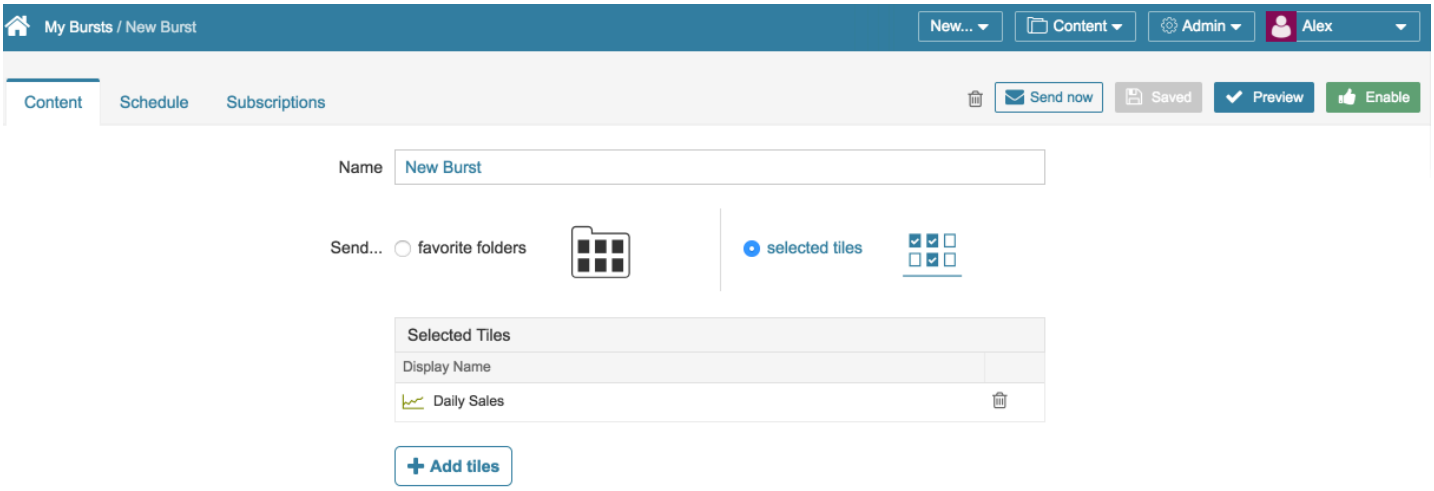
The selected Burst is going to be updated and will include this new element

3. To set up a new burst



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

3.1. Proceed with creating a new Burst



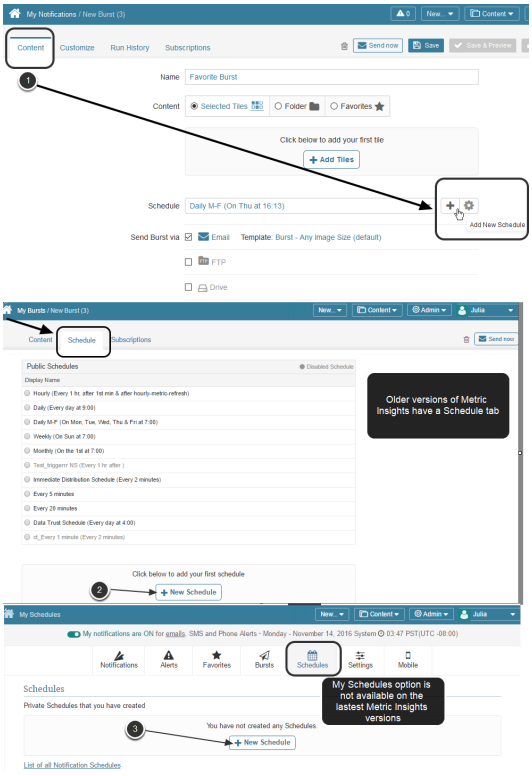
For complete steps, see [Setting up a new Report Burst]

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

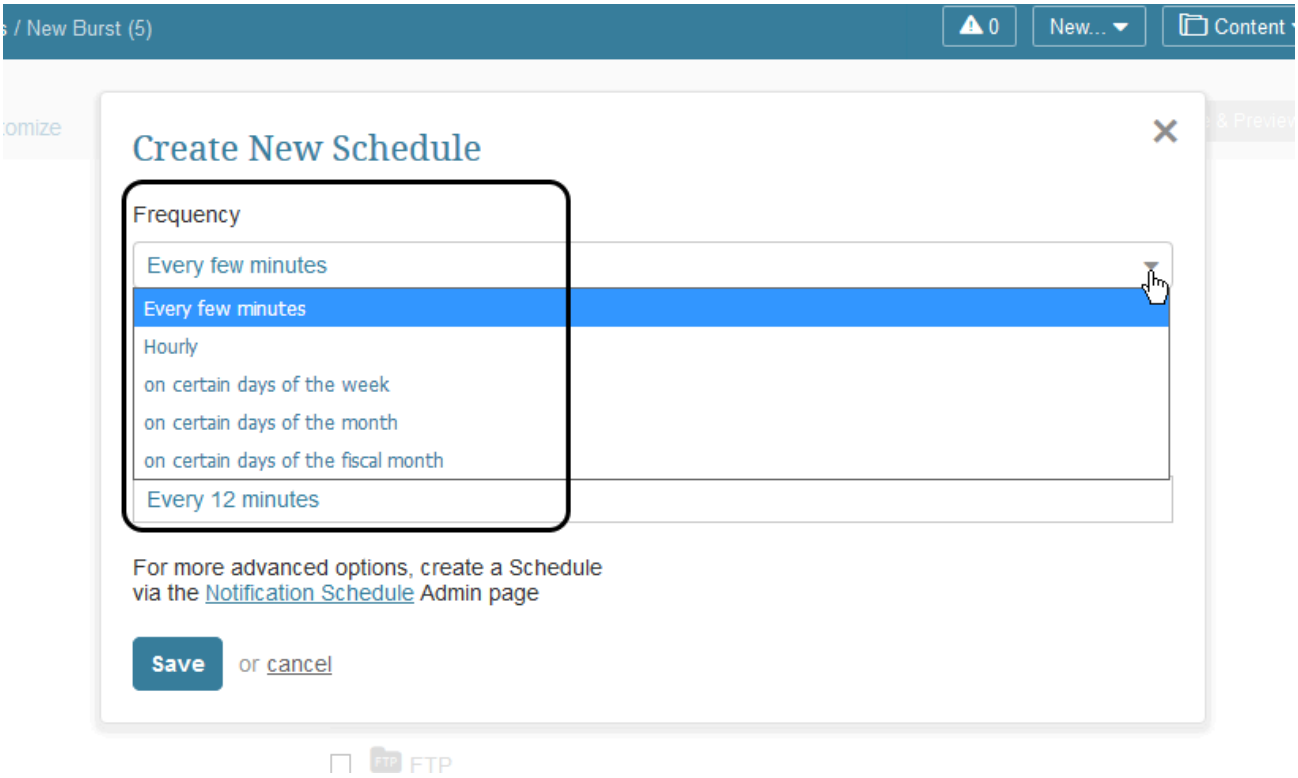
1. Users can create their own schedules from as part of creating new Bursts (Access New menu > Burst)



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

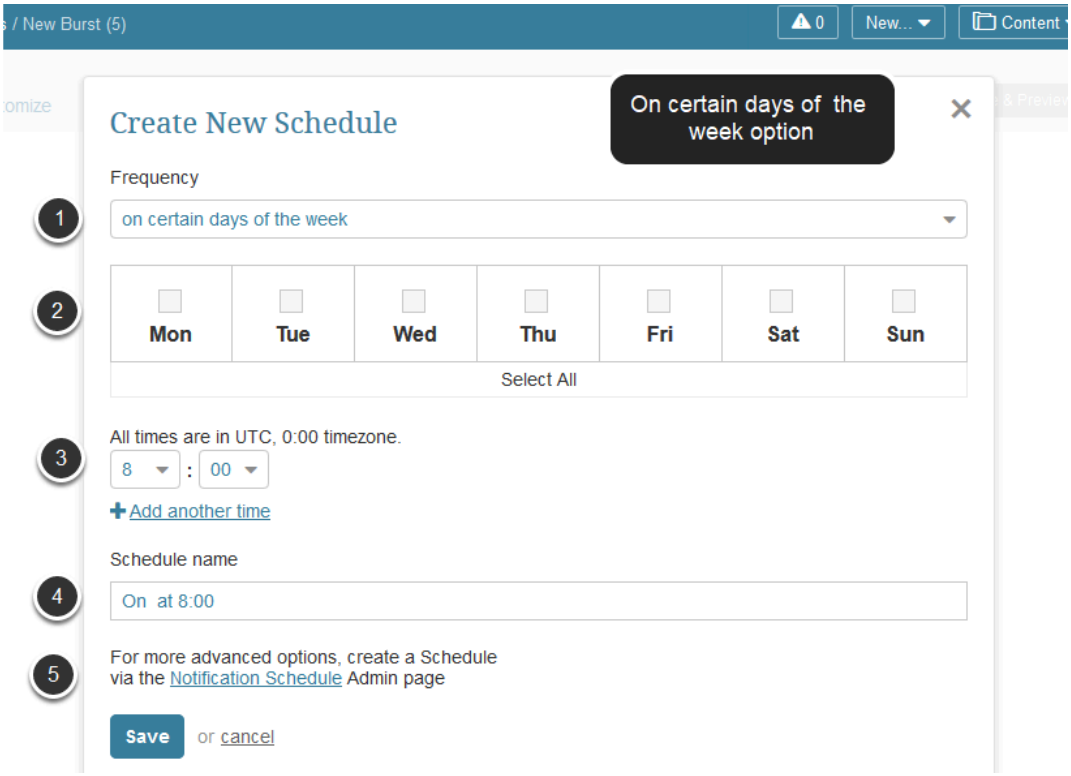
1. [5.2] When creating a new Burst using the ***Content*** tab
2. [5.0] When creating a new Burst using the ***Schedule*** tab
3. *[4.x] My Preferences > My Schedules*

2. 'Create new schedule' pop-up appears



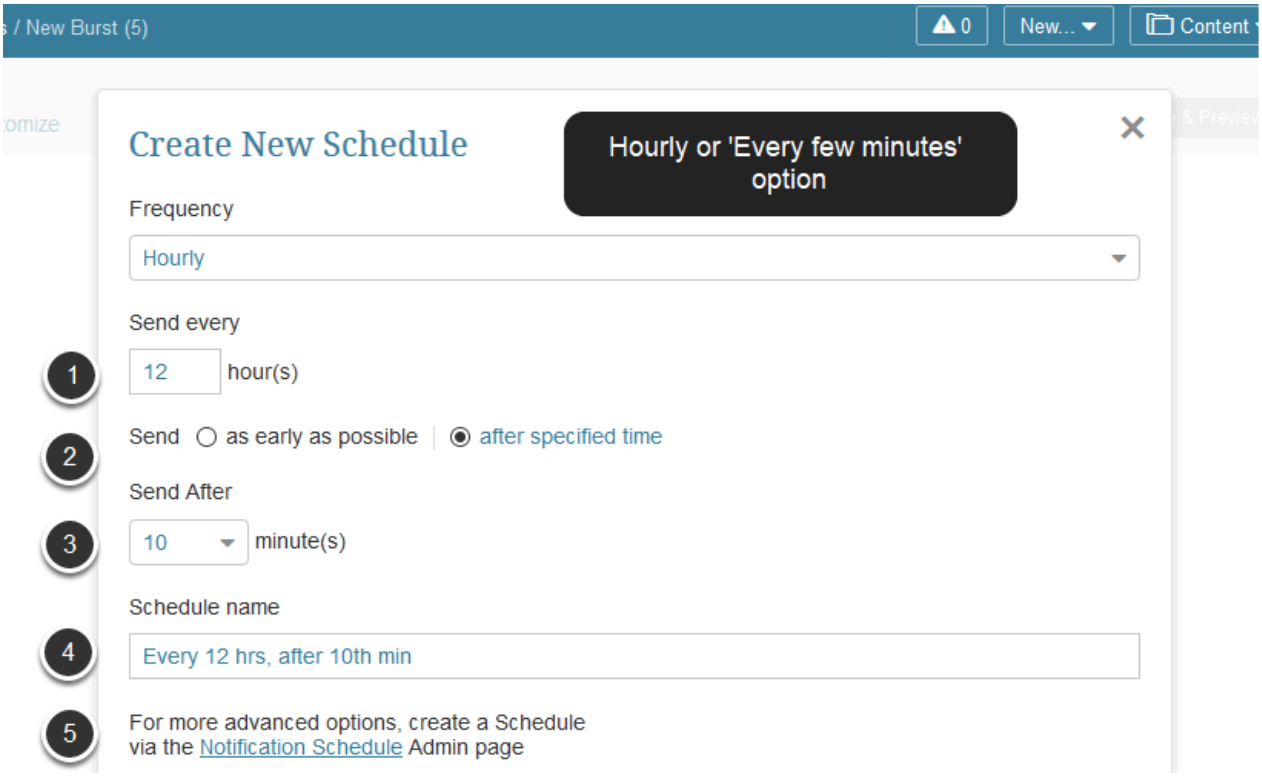
Select a Frequency from the drop-down and further options available will depend on the Frequency chosen.

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



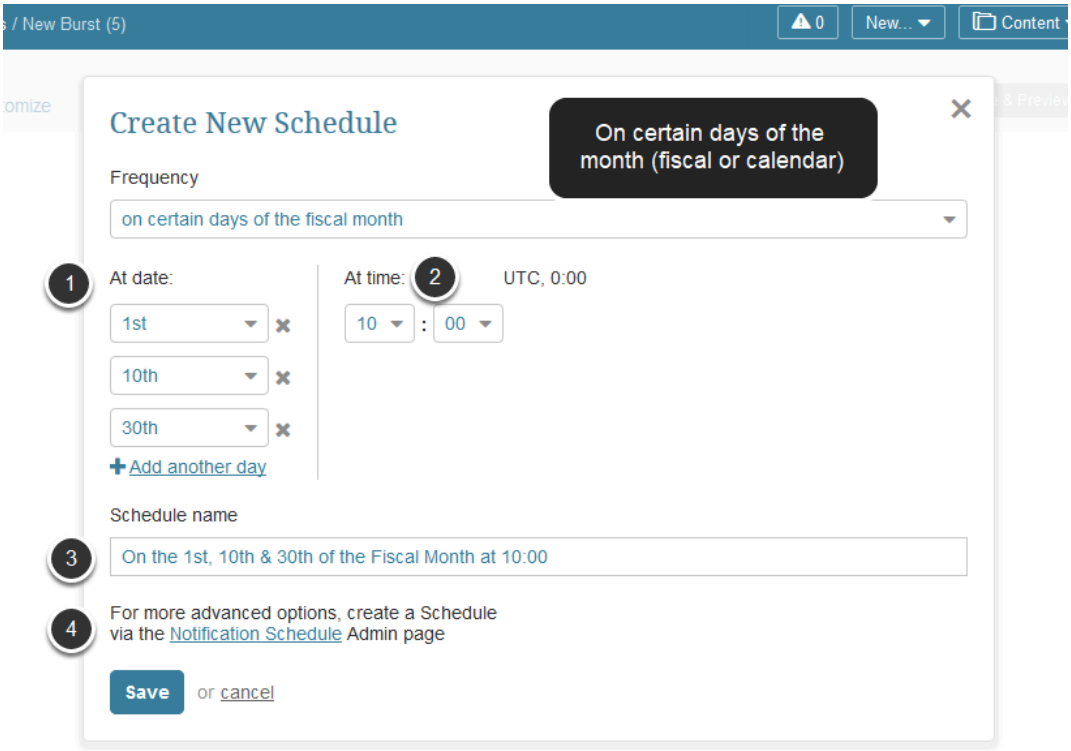
1. Select to schedule by **day of week**
2. Select **days of the week** by activating the corresponding check boxes
3. You may schedule one or many **times per day**
4. **Schedule name** will be automatically generated or you may override with name of your choosing
5. Admin Users can access more scheduling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

2.2. Hourly or 'Every few minutes' schedule options



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)

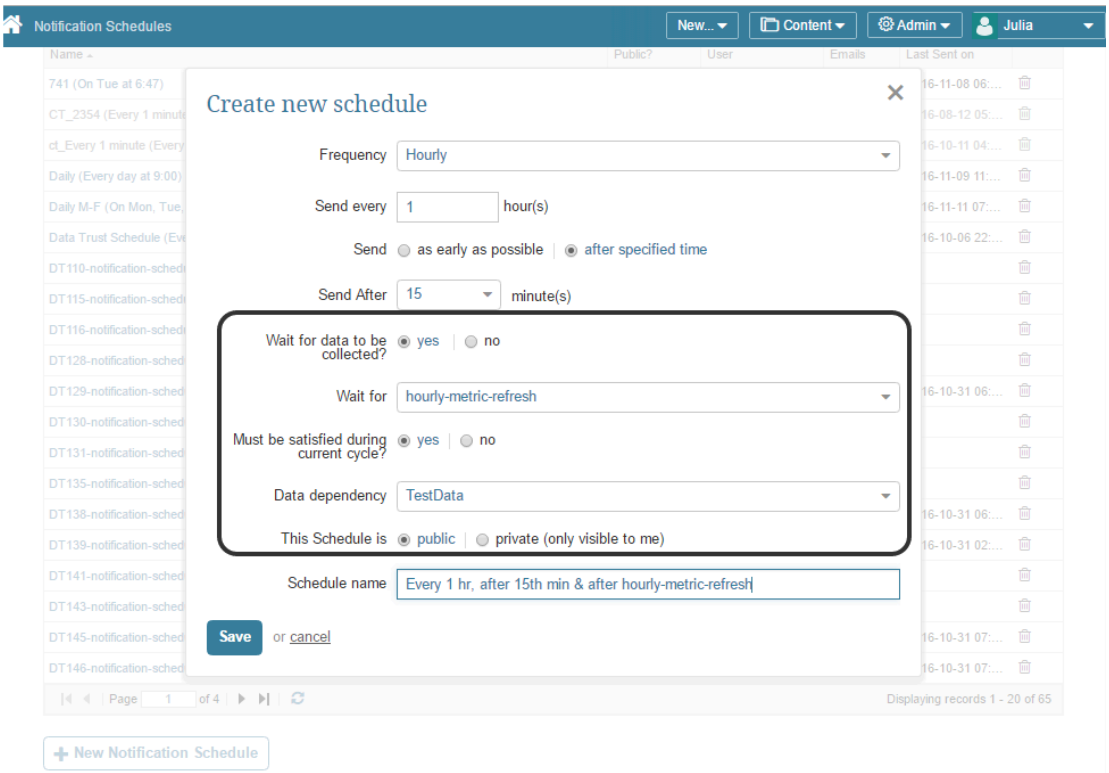
2.3. 'Certain days of the Month' schedule options



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.



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.

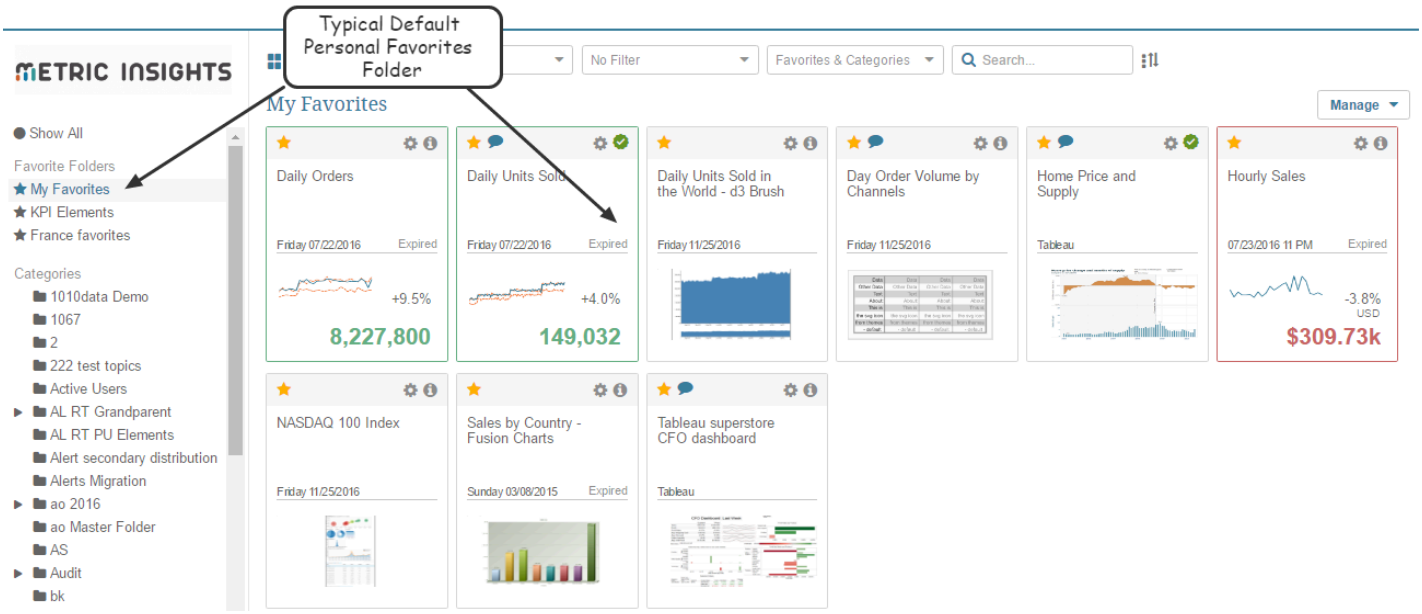
There are two types of Favorites Folders in Metric Insights:

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.

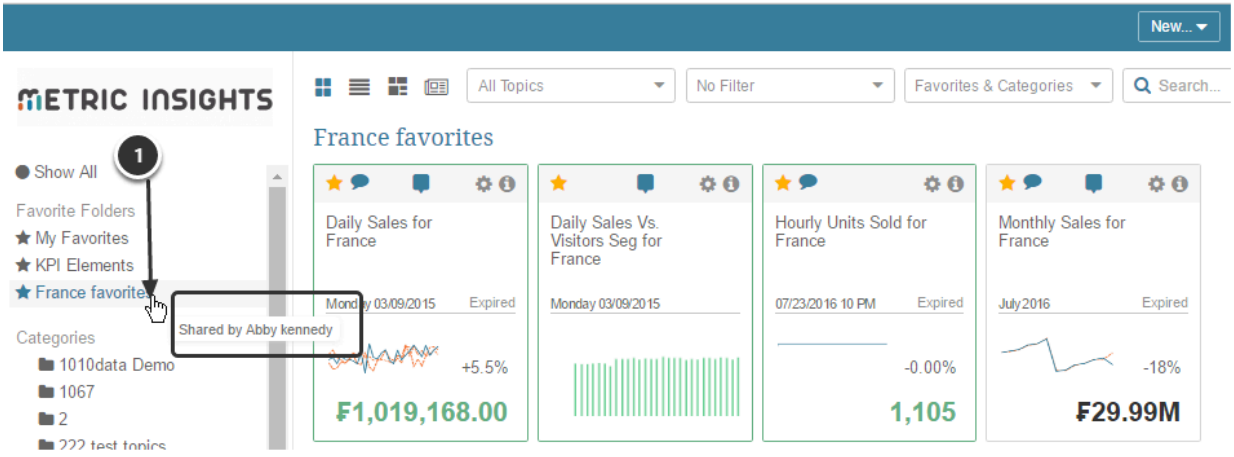
NOTE: If you add hidden (non-visible) elements to your Favorites Folders, you will only see these in **Favorites** folder sections and not in their corresponding **category** on Homepage. This can occur when reports or metrics are provided in Drill-downs but not set to display on Homepage.

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

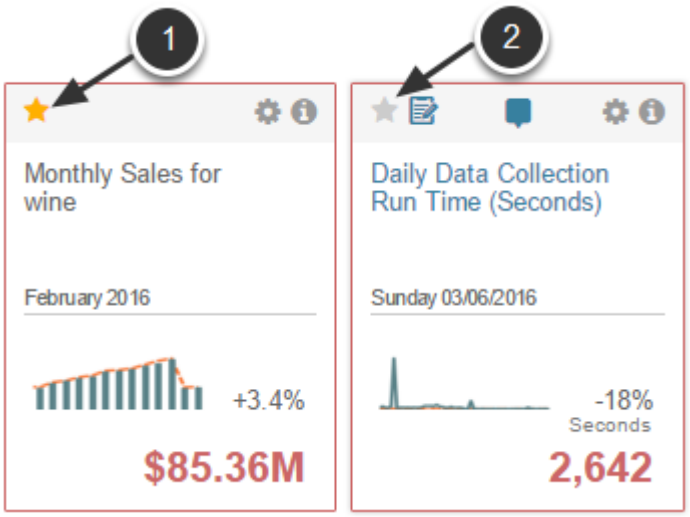
6.2 Add (or Delete) Elements to a Favorites folder

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 configurations is set by the User sharing the Favorite folder)

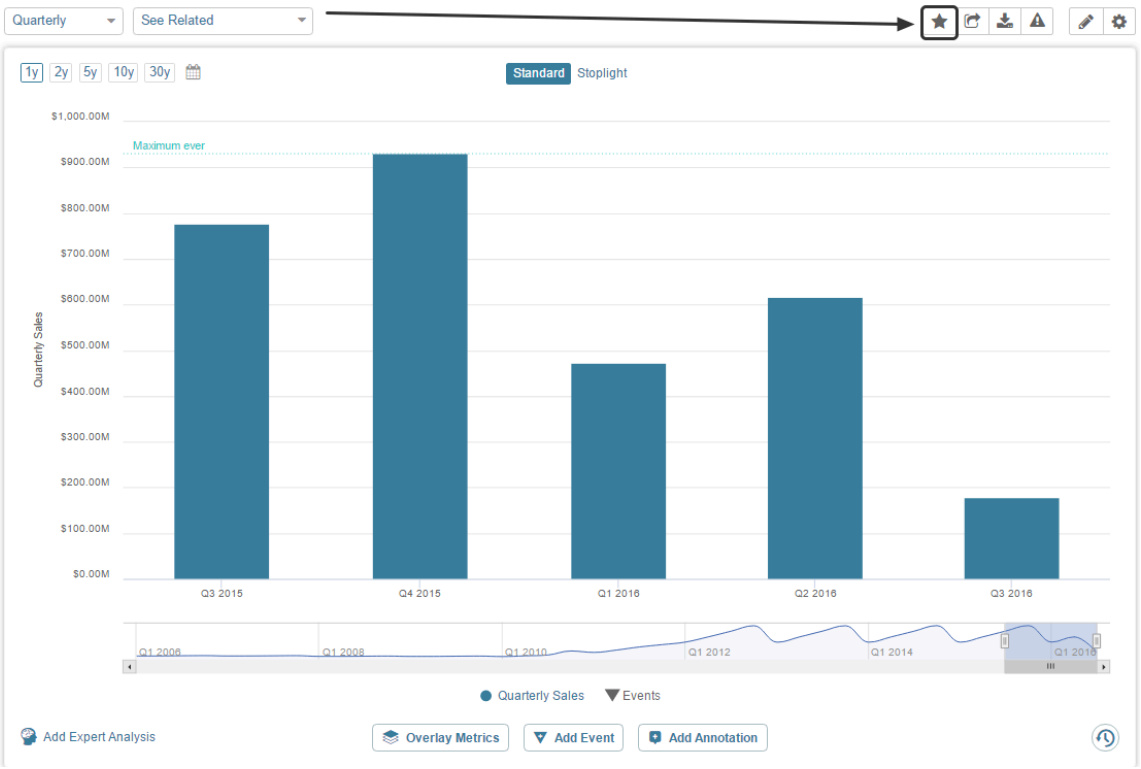
Tiles can also be added to Favorites via your *Favorites* Editor, see Using Notifications: Favorites Editor to Maintain Favorites

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



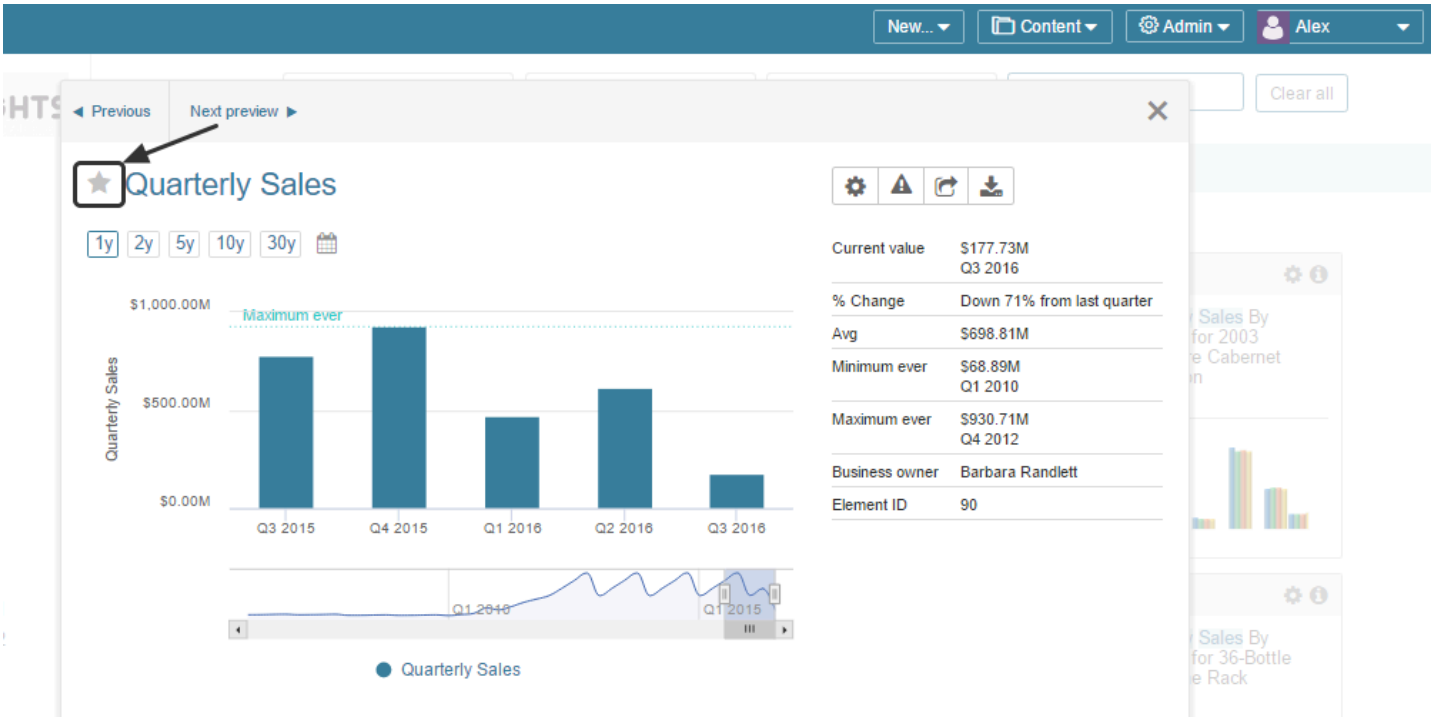
1. Example of an element already added to at least one Favorite folder (gold star)
2. Example of an element not yet included in any Favorite folder (grey star)

1.1. The Star icon on Viewers



This Chart has not yet been included in any Favorites folder

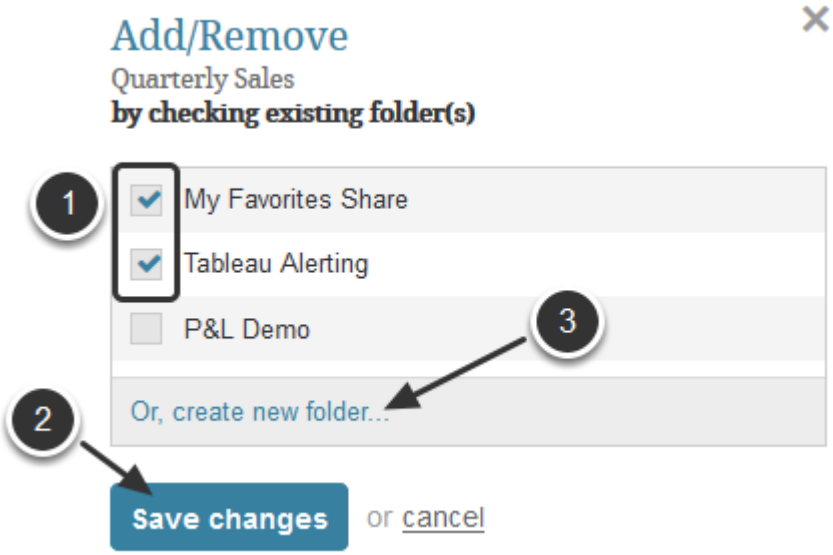
1.2. Or on the Preview of any Chart



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

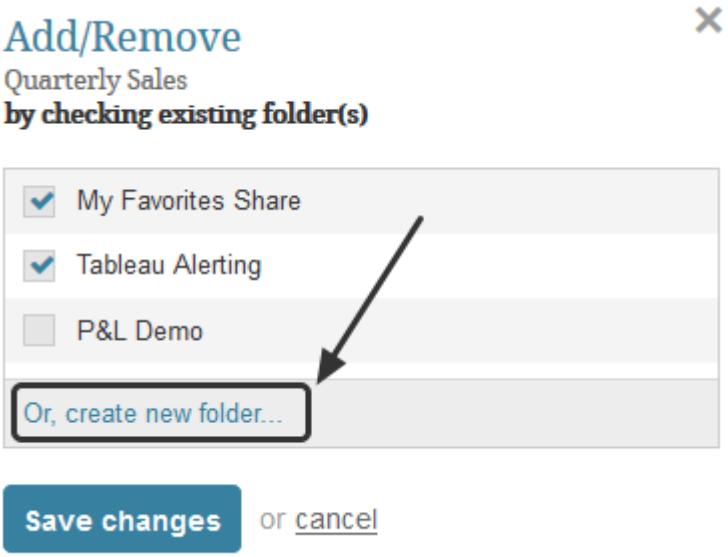
The *Add/Remove* pop-up opens

2. Add an element to Favorite folder(s)

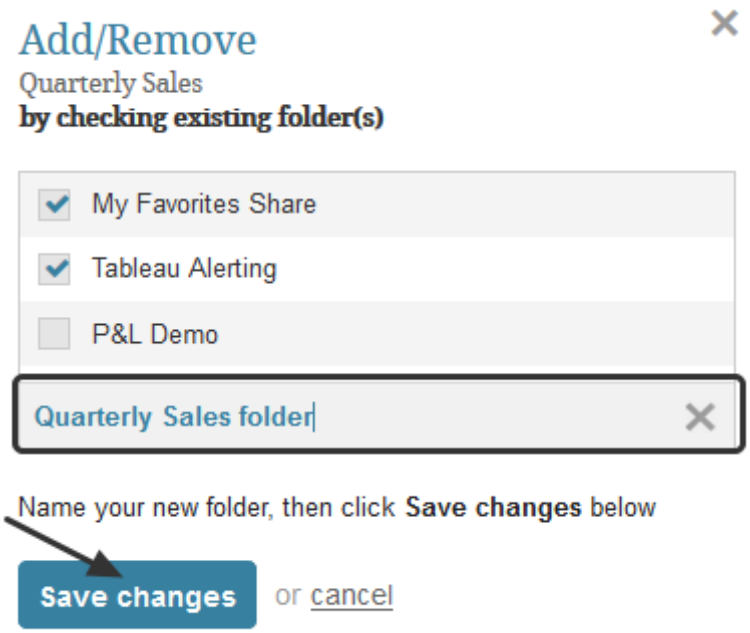


1. Select or clear check boxes to add or remove the Chart from the corresponding Favorite folder(s). Multiple folders can be selected at once
2. Click **Save changes**
3. Alternatively, you can choose to create a new Favorite folder (see below) based on your assigned **Permissions**

2.1. Click 'create new folder'



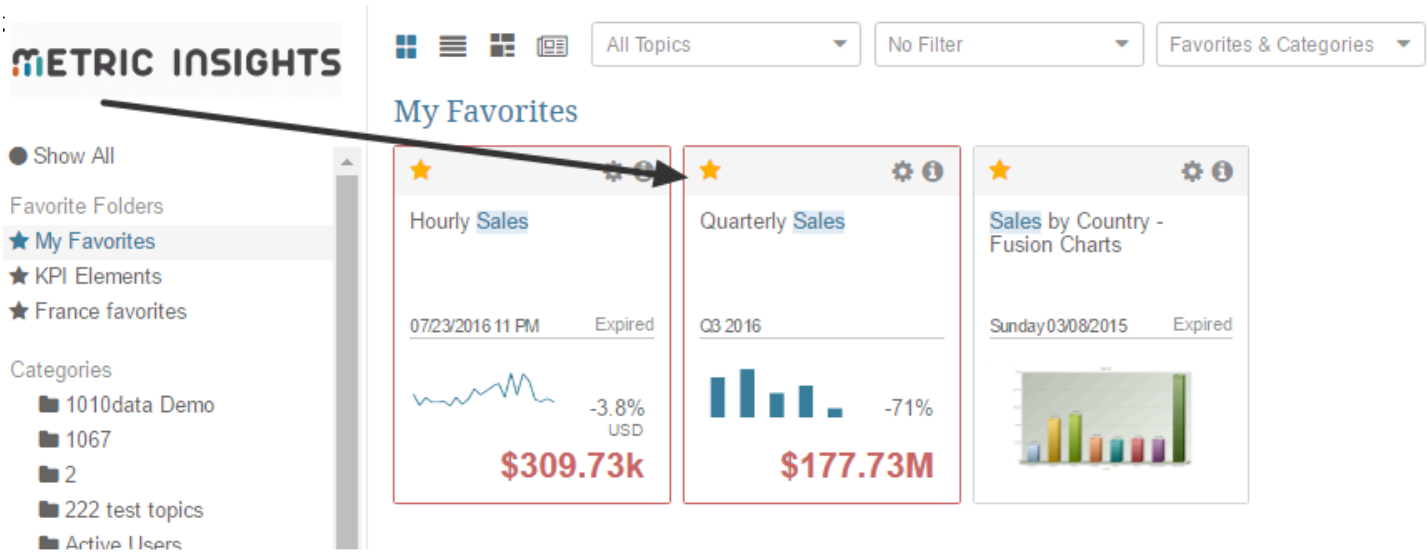
2.2. Enter the name for a new Favorite folder



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)

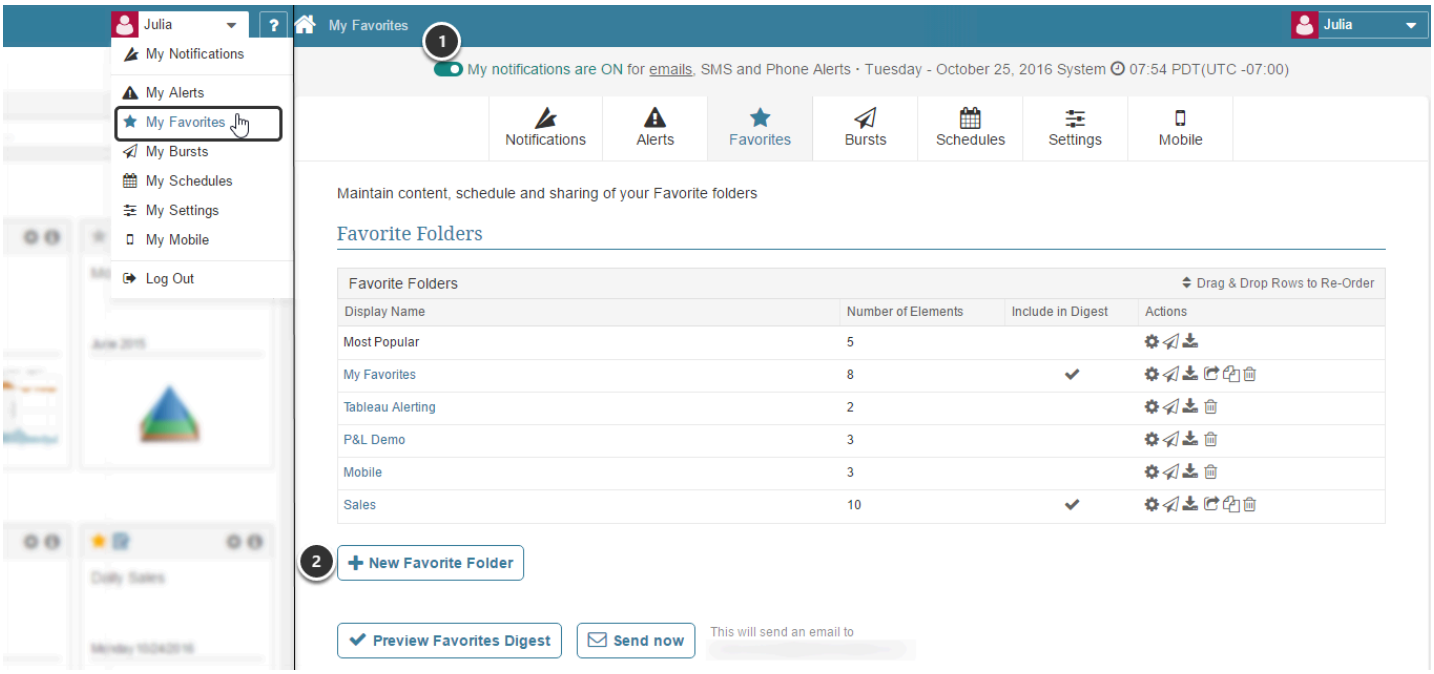


Once the element is added to the Favorite folder(s), its **Star** icon turns golden on all element displaying options

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

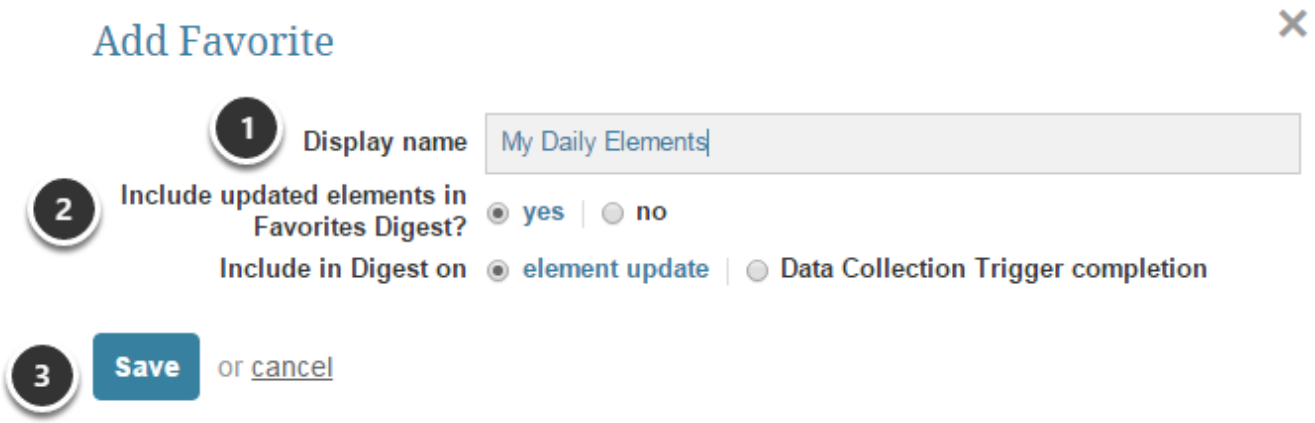


1. From *My Favorites* screen you can manage your folders, preview them, or send a test email notifying you on any updates on the items included to these folders.

For details, see Requesting a 'Daily' Favorites Digest

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

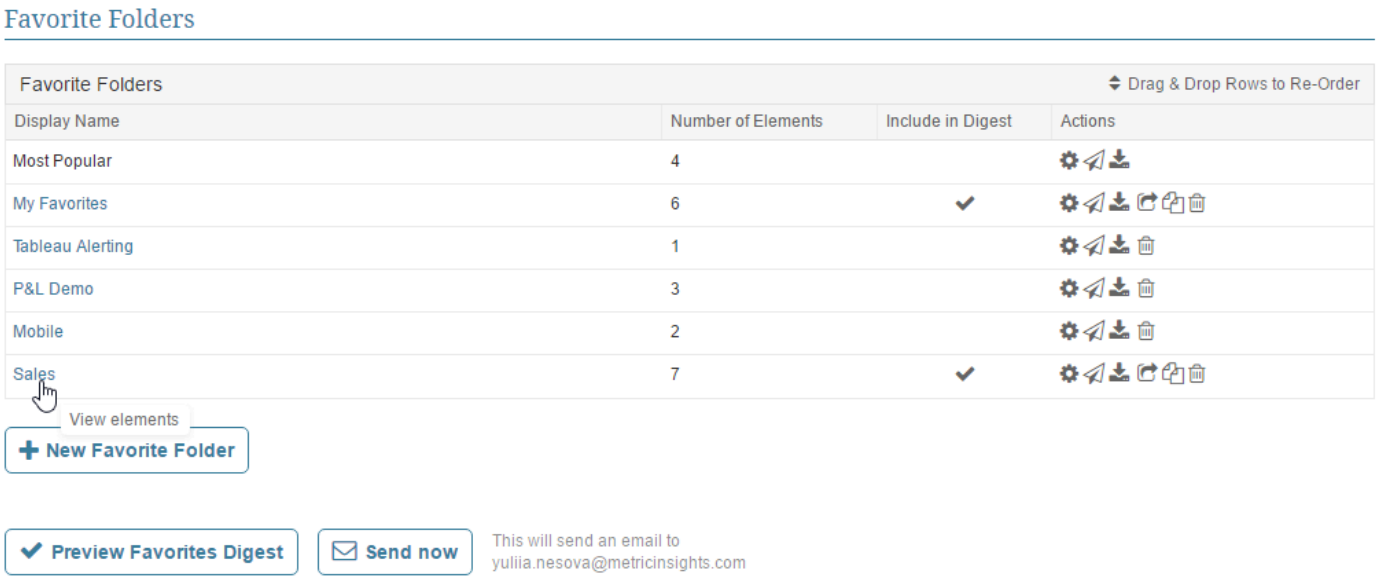
1.1. Adding a New Favorite Folder



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).

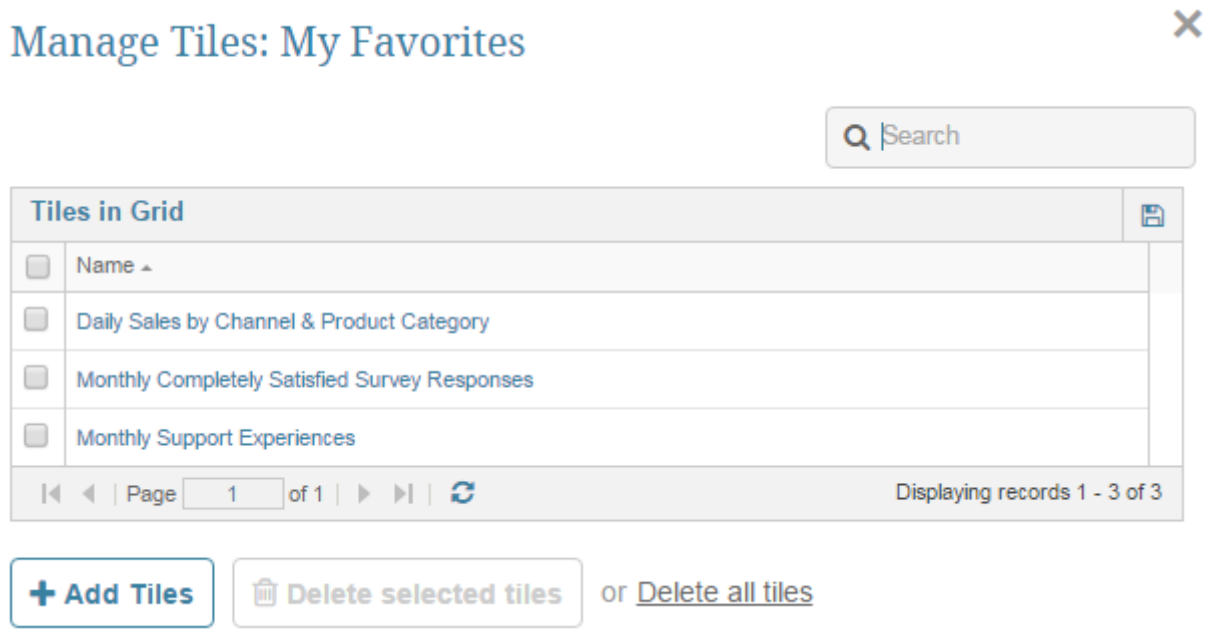
2. Adding or Deleting Elements from an existing Favorites Folder



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'.

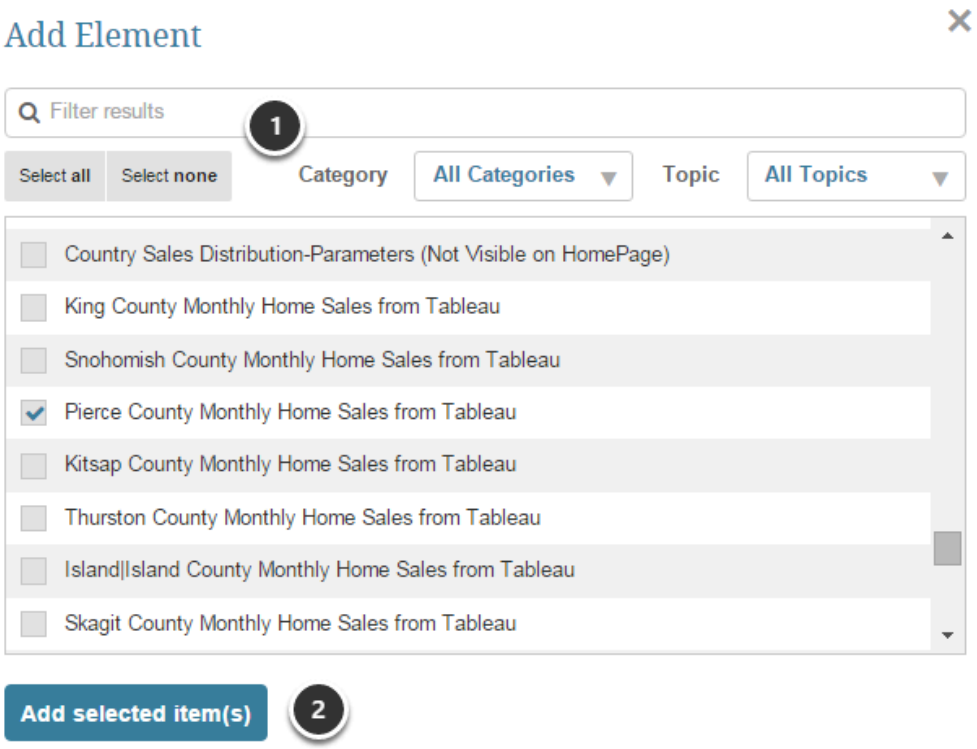
If you select this option for a folder that you cannot maintain, only a listing of existing elements will display without the add or delete options

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



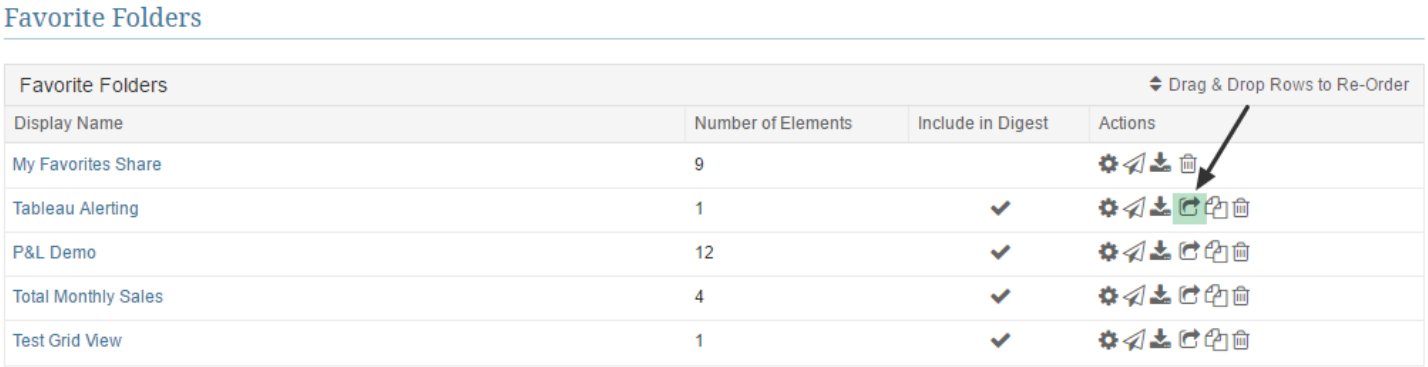
1. Checking any element(s) will un-hide the **Delete selected items** button to allow multiple deletions
2. Use **Add Tiles** to display Add Pop-up

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



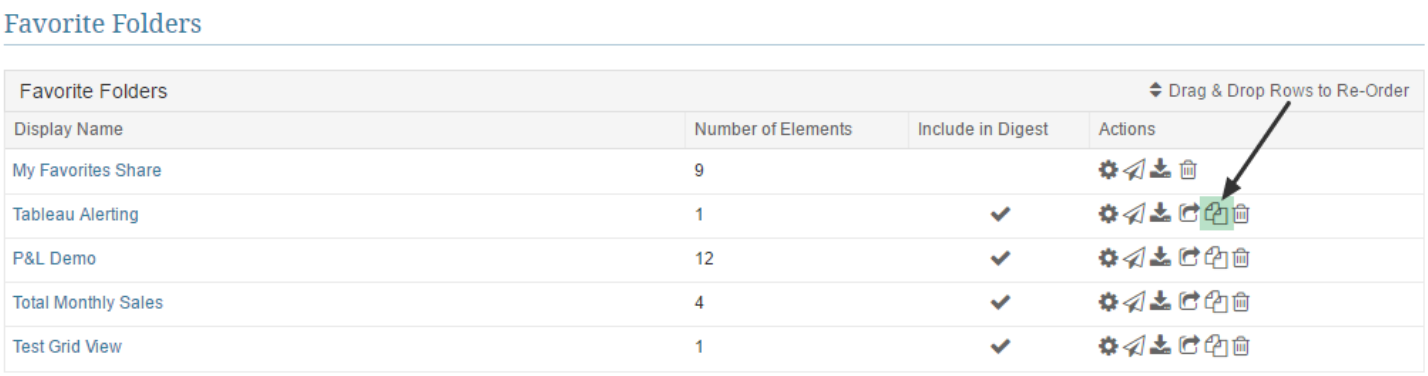
1. You can limit pick-list for Elements by **Category** or **Topic** or by using the **Filter** or a combination of these
2. You can **Add** items by using the check boxes and **Add selected item(s**) button

3. To Share a folder



Click the '**Share**' icon and following instructions here

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



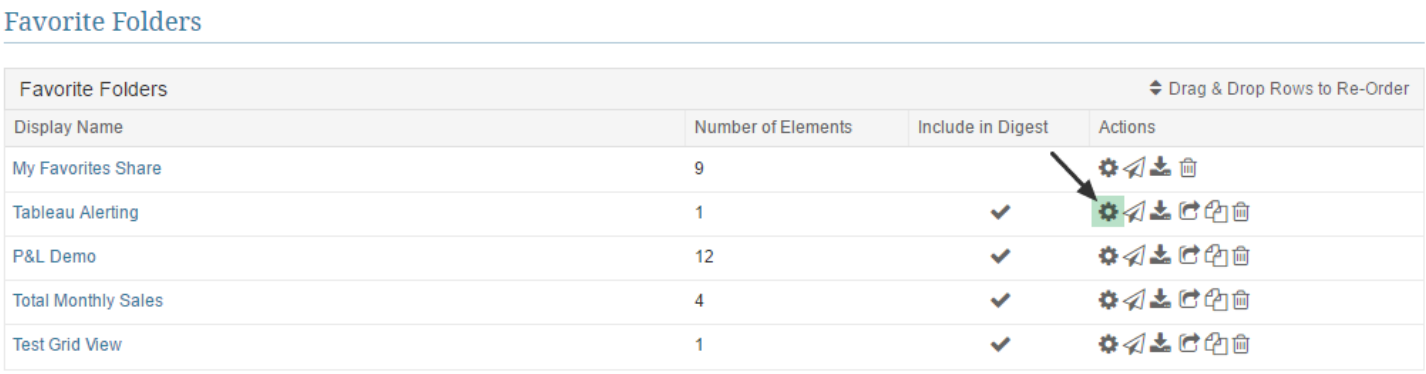
Select the 'Duplicate' icon to display the Pop-up

4.1. Complete the 'Duplicate Favorite' pop-up

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

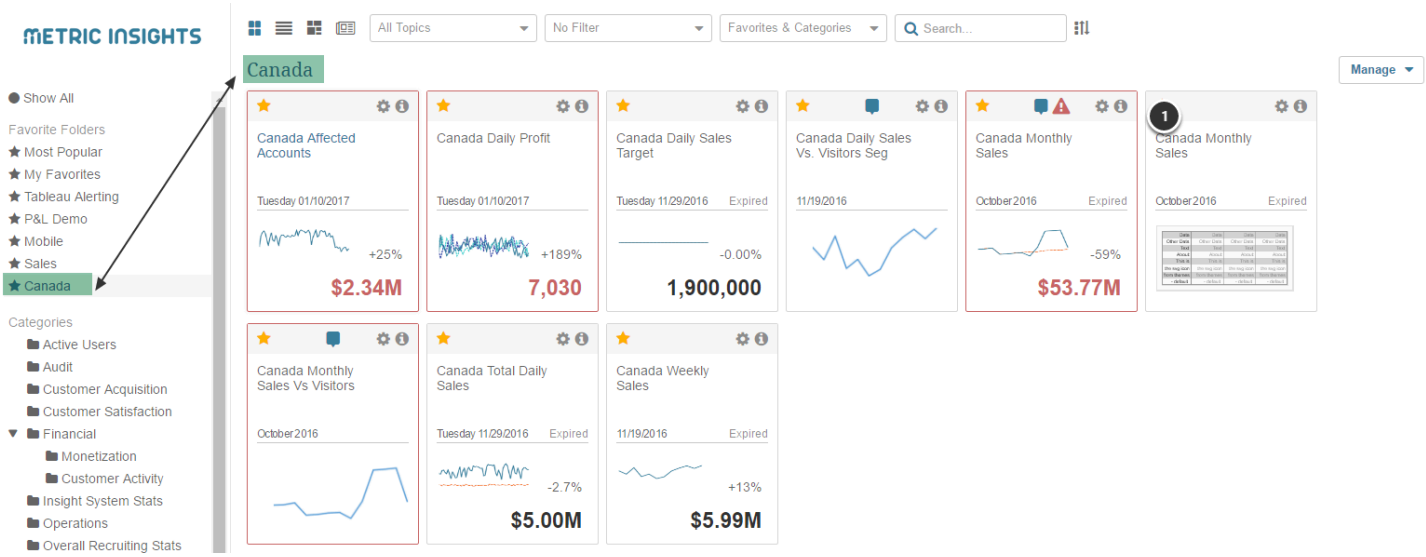


See instructions here [Using Favorites Editor to Maintain Favorites]

6.4 Duplicate an entire Favorite Folder automatically

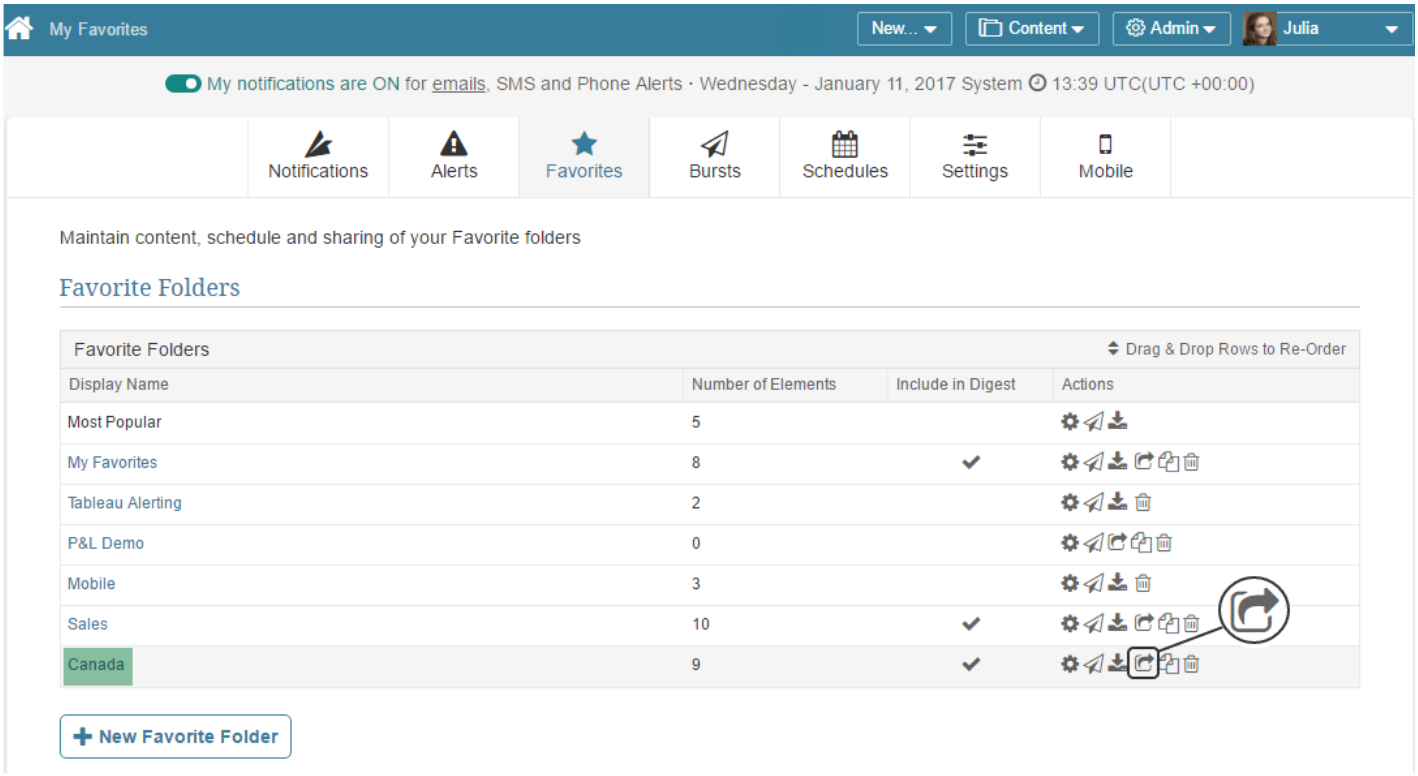
This feature allows you to copy the entire contents of one folder to create another. This is helpful when you have users that typically view a single segment. Optionally, the **Permissions** of your existing *Favorites* folders can be copied in order to put the segments into separate folders for the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



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

3. Complete the 'Duplicate Favorite' pop-up

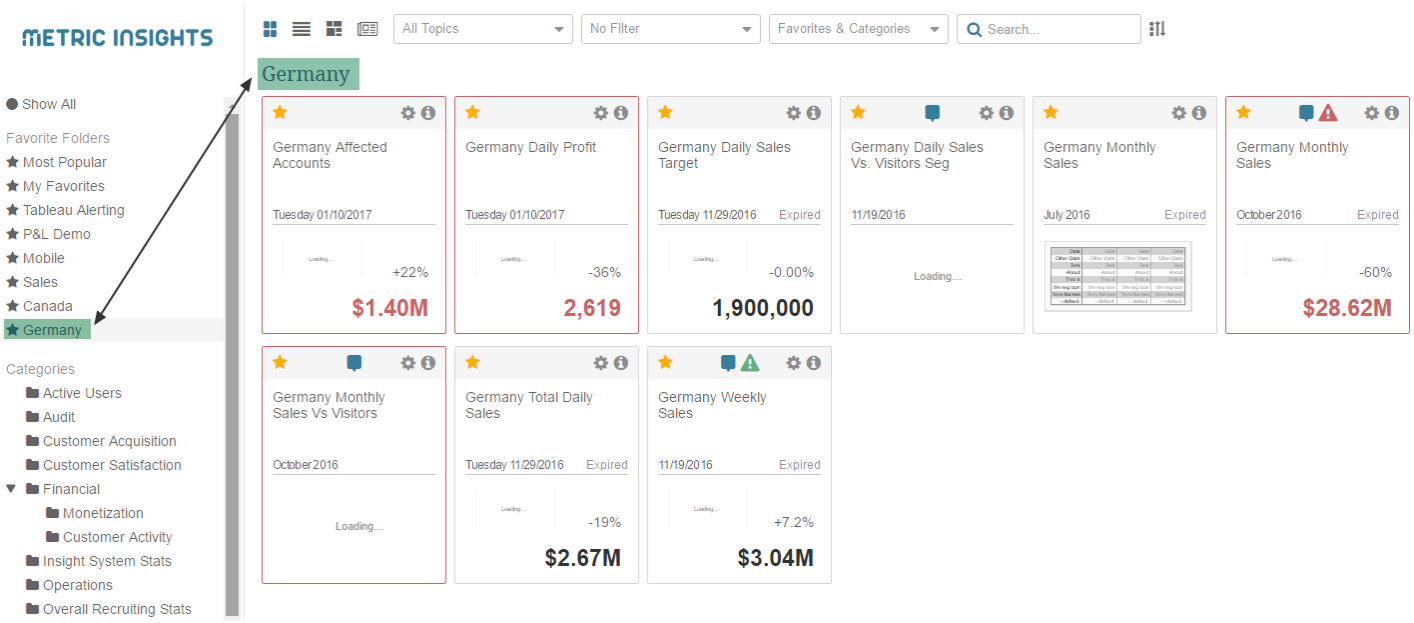
1. Select a **New folder Name** since two folders cannot have the same name
2. Determine if you want to retain the same 'permissions' for the new folder:i.e.; the same set of Shared Users or Groups
3. Select the new Dimension value from drop-downs

Click **Duplicate** to complete the process

4. Example of New Favorites Folder in Favorites Editor

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



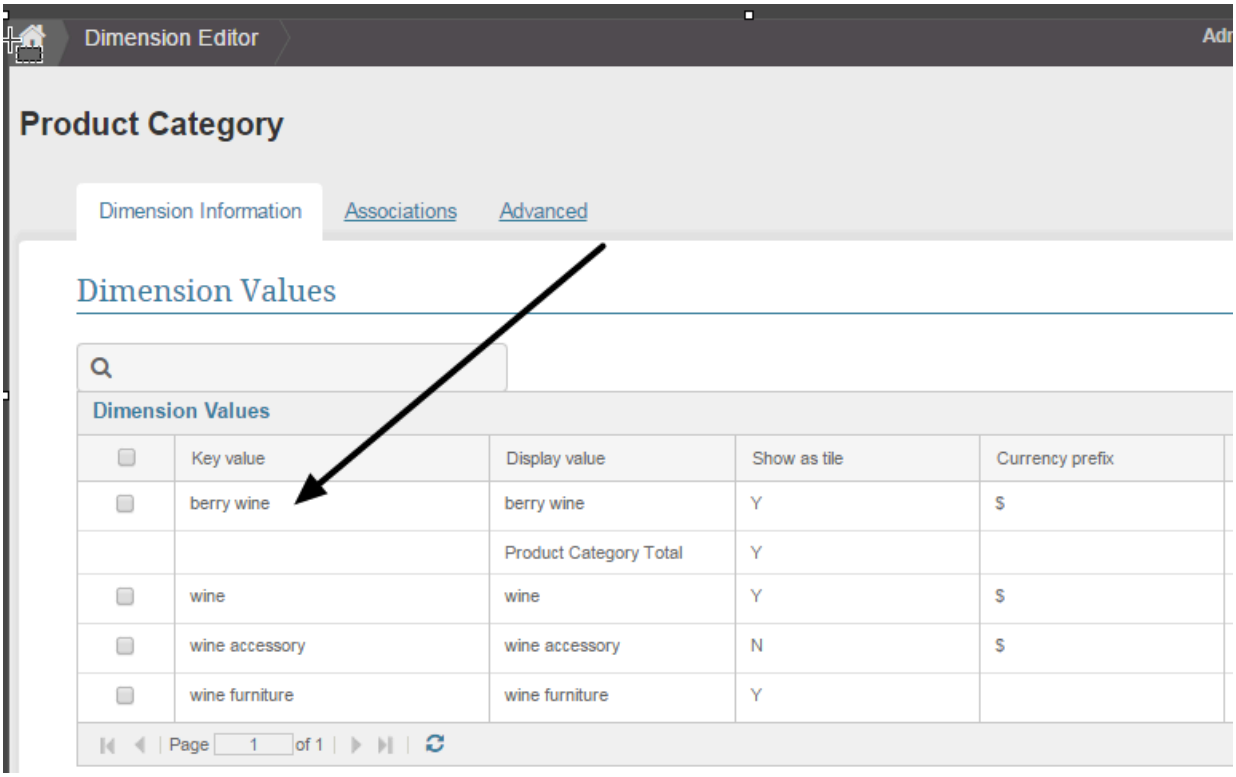
6.5 Adding elements without data to Favorite folders

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.

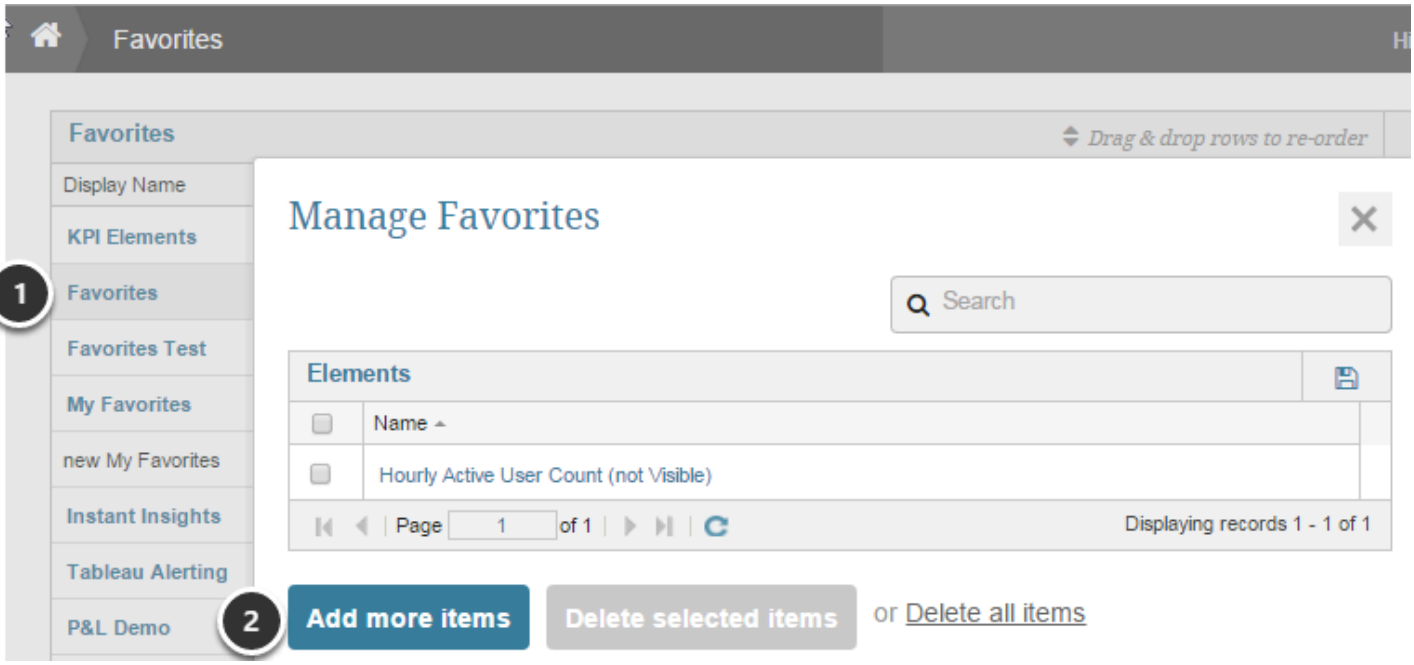
You cannot use the Favorites star to select these as we do not display 'empty' elements in the Home Page, and dimensions without any values will not display in the Viewers.

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

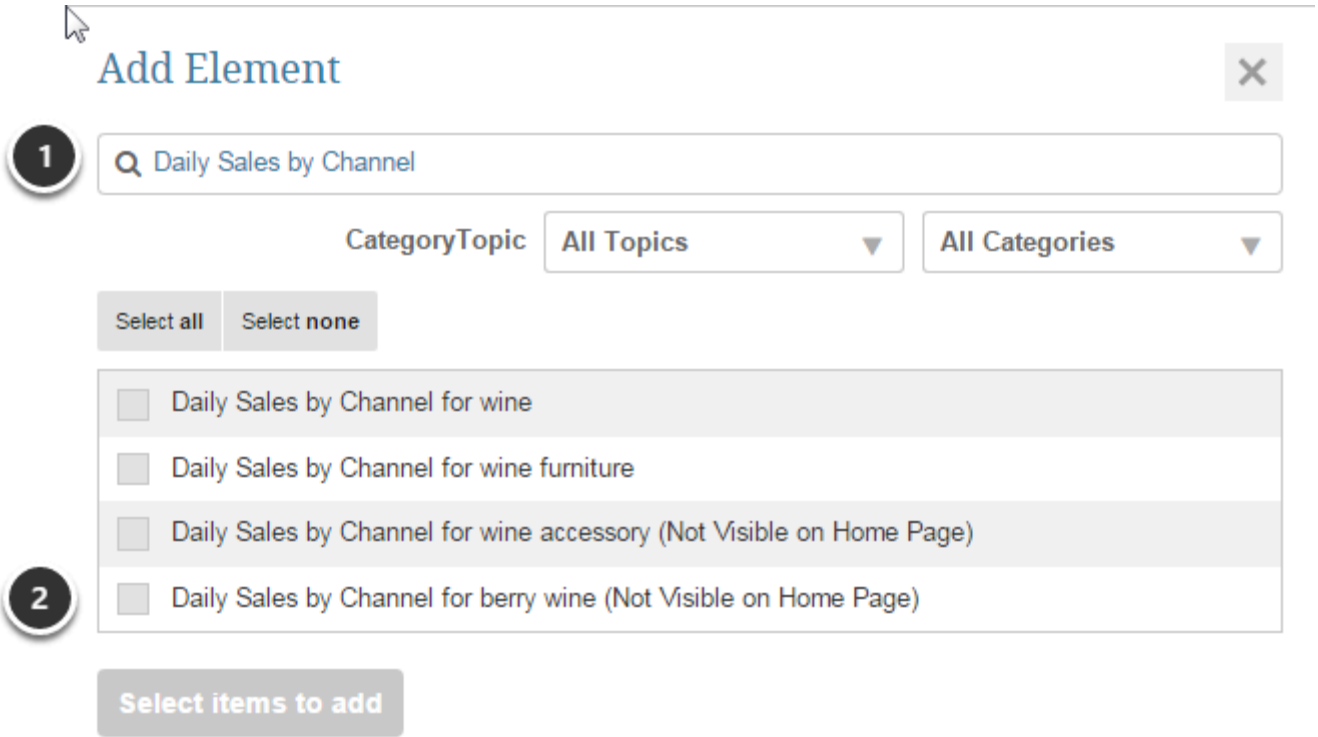


2. Open 'Manage Favorites' pop-up



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

3. Filter elements by your report name



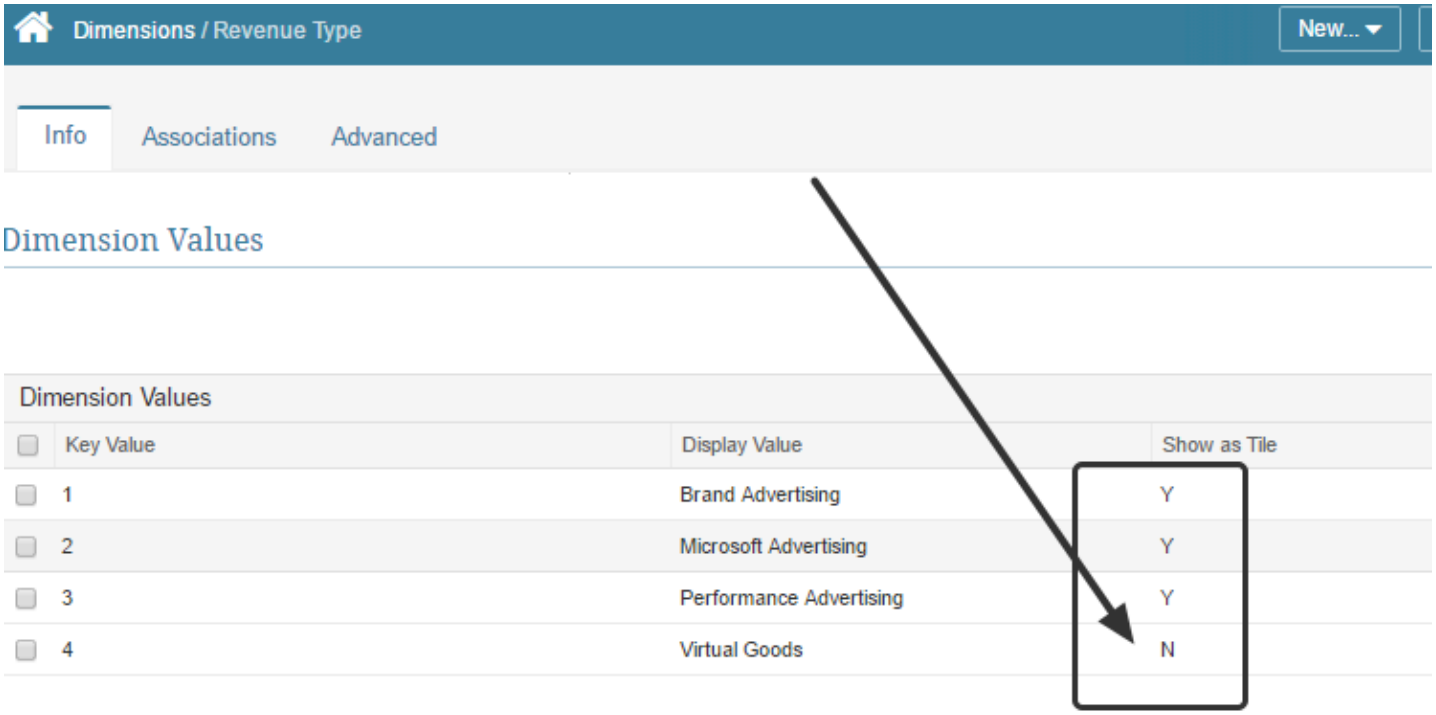
You can now select '**berry wine**' and the report will appear in your Favorites folder when data is collected.

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.

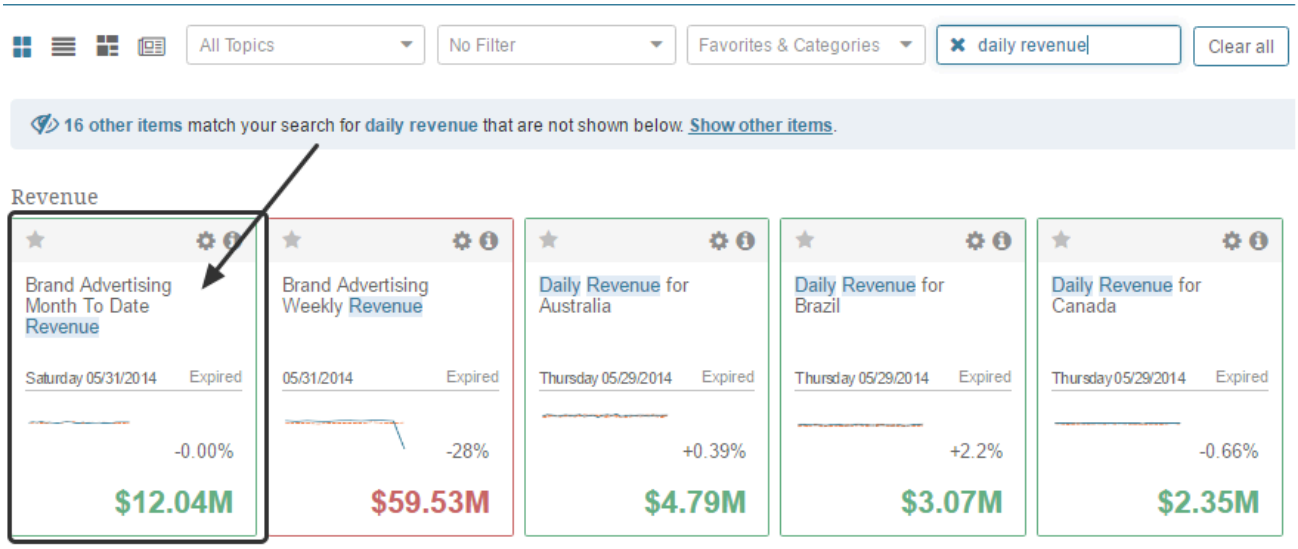
At least one Dimension Value's tile should be visible in order to provide easy access to "Hidden" ones.

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



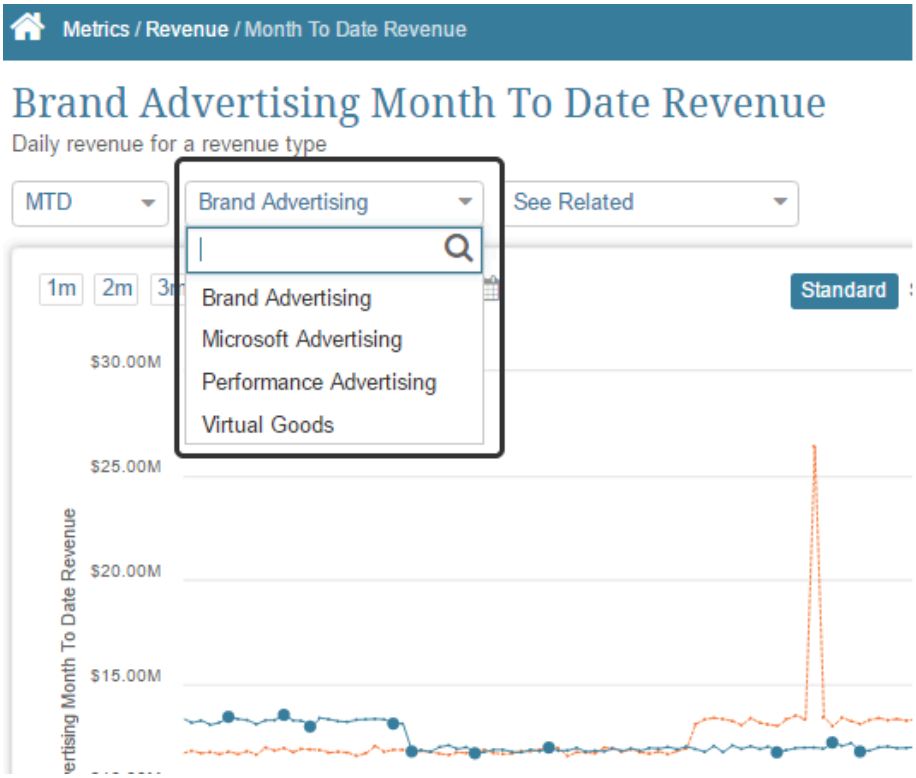
Note that 'Virtual Goods' Dimension Value's **Show as Tile** setting is set to 'N' while others are configured to be visible on the *Homepage.*

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



The *Metric Viewer* opens.

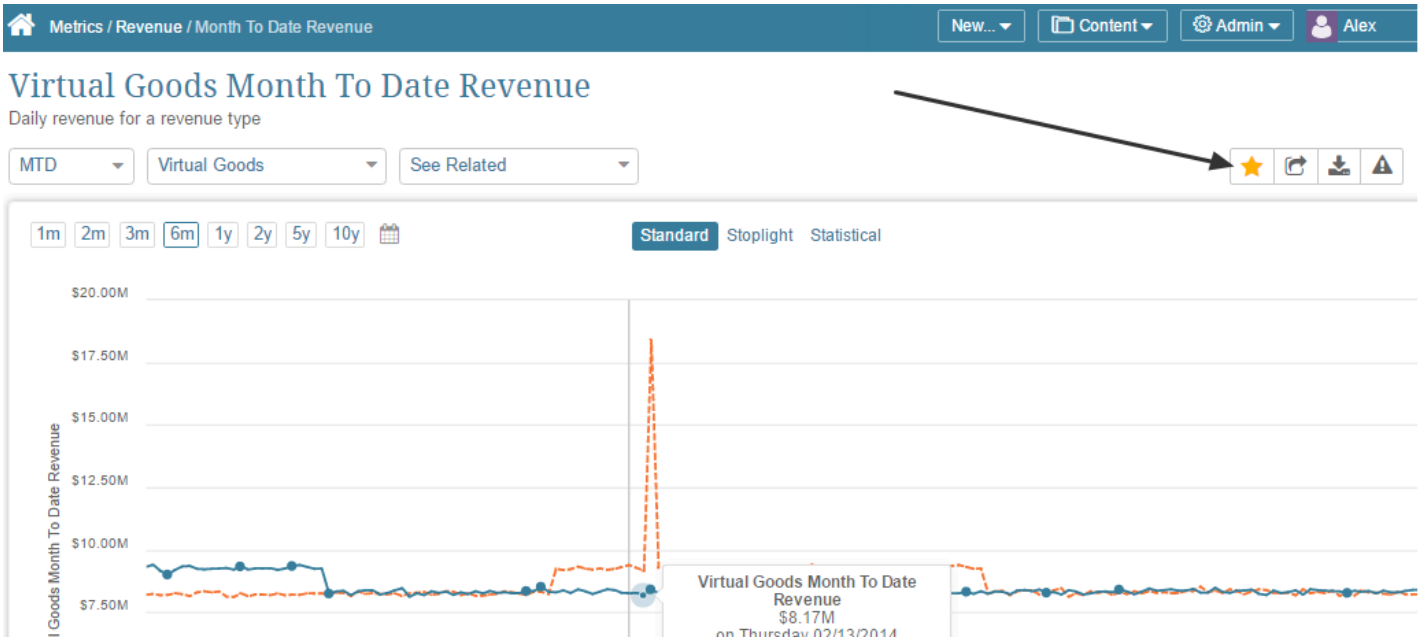
2. Open the Dimension drop-down list



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

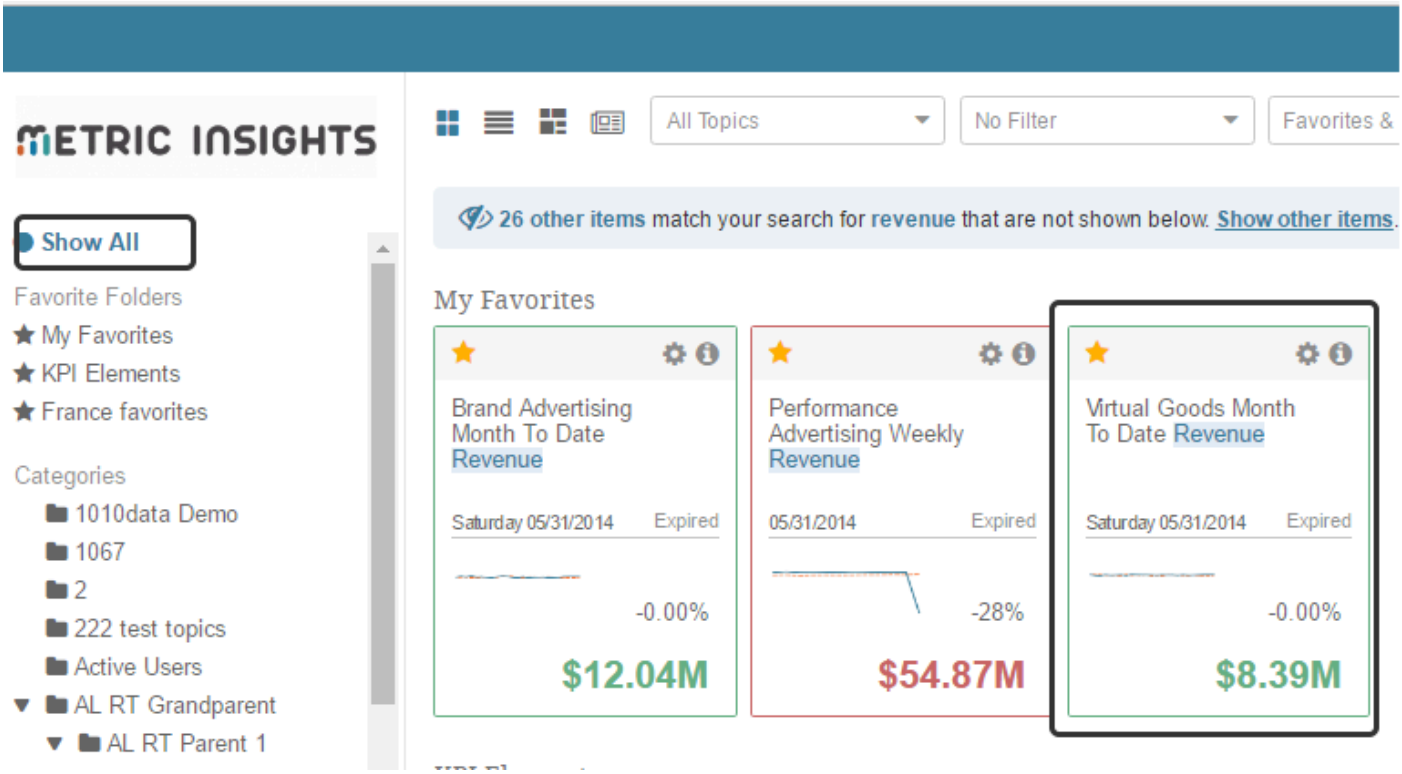
The 'Virtual Goods Daily Revenue' *Metric Viewer* opens.

3. Click on Star to add to a Favorites folder



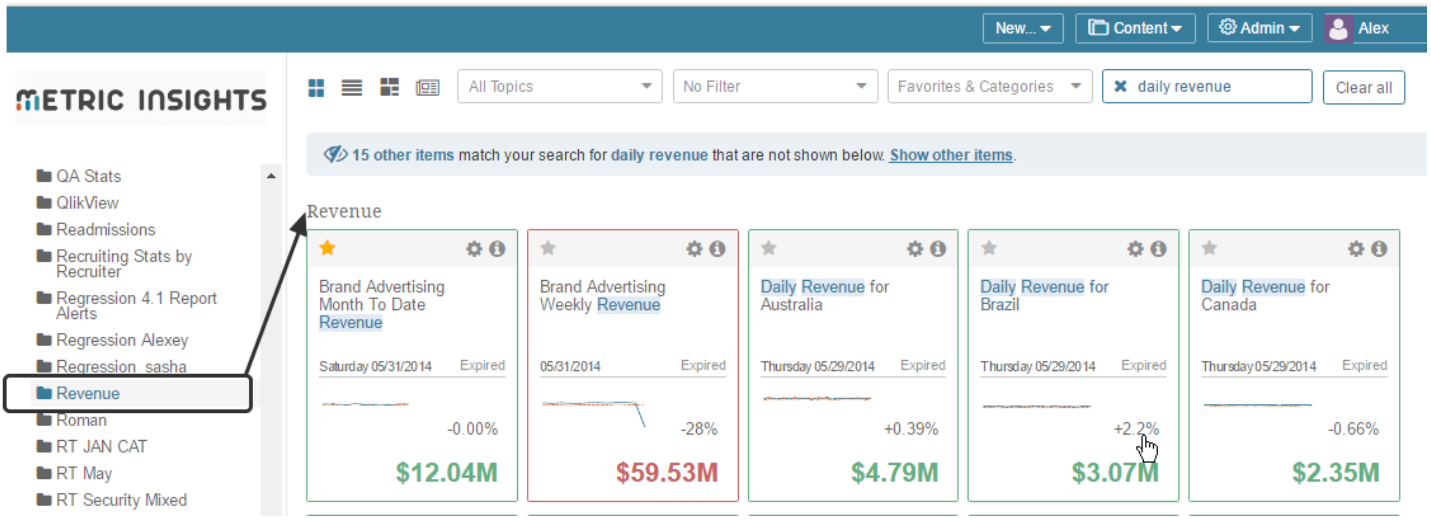
For more information, see Add (or Delete) Elements to a Favorites folder

4. Return to the Homepage



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.

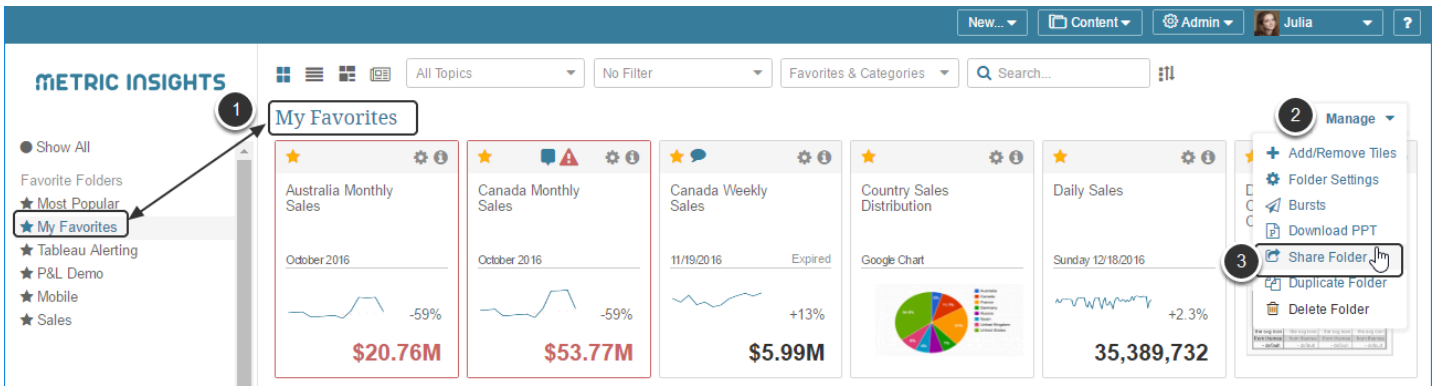
When you share a folder, all options which you have set including sorting and summary comparisons will be propagated to folders you have shared. Users are free to alter these options for their own version to control Digest frequency and contents.

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.

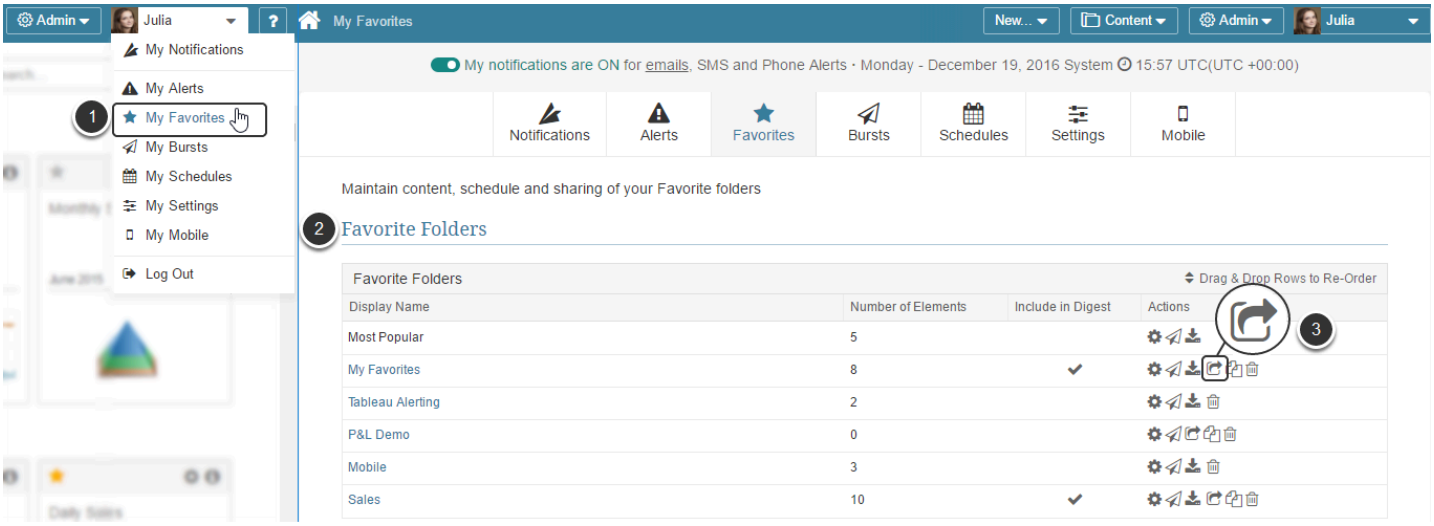
Users are restricted to sharing Favorite Folders with those Groups of which they are members. There is an additional restriction that only Administrators can share folders with the **'Default Group**'.

1. [Option 1] Via the Homepage



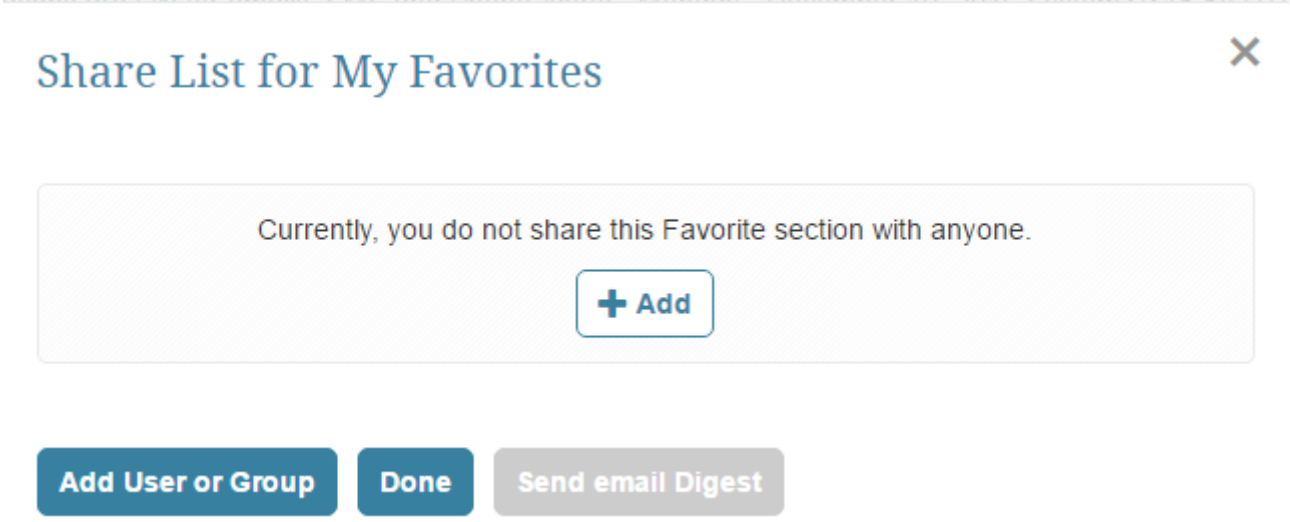
1. Select one of your favorite folders at the *Homepage*
2. At the top right corner of the screen open the **Manage** menu
3. Select the **Share Folder** option

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

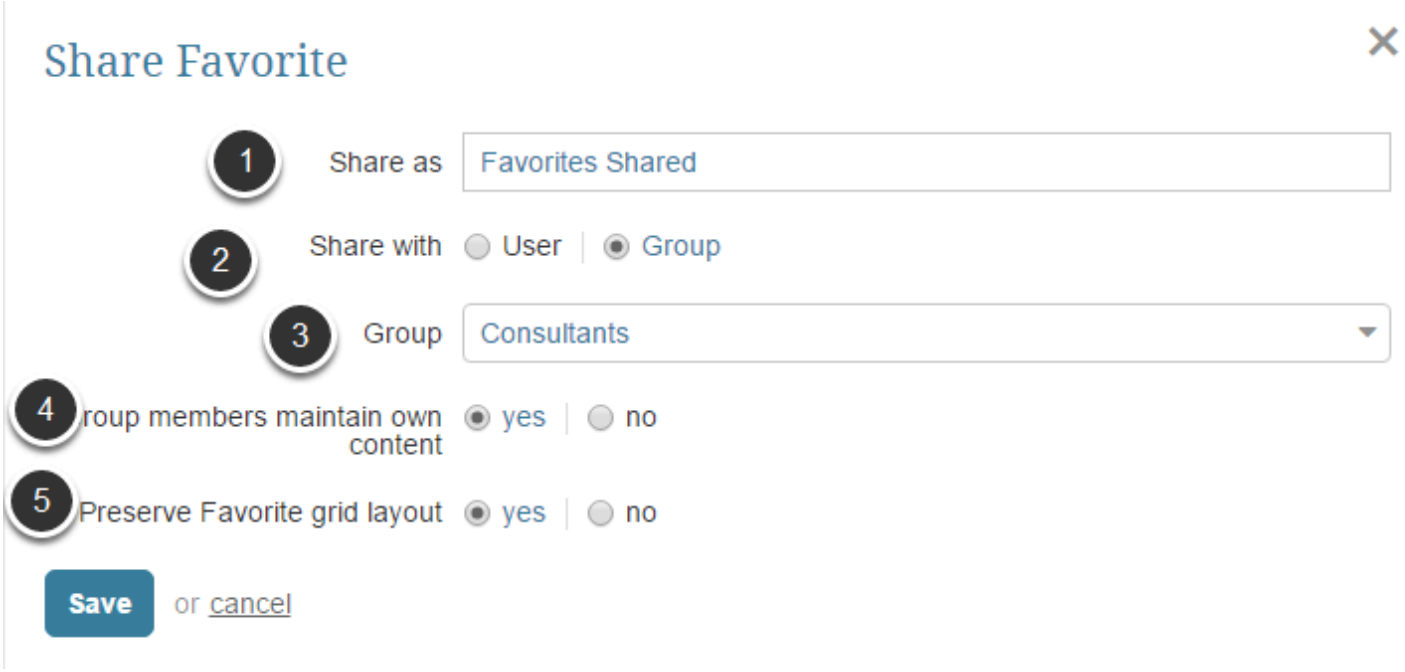


1. In **My preferences** menu below your username select **My Favorites**
2. The list of your Favorite Folders opens
3. Select the folder

2. Click the 'Add User or Group' button



3. Complete 'Share Favorite' pop-up

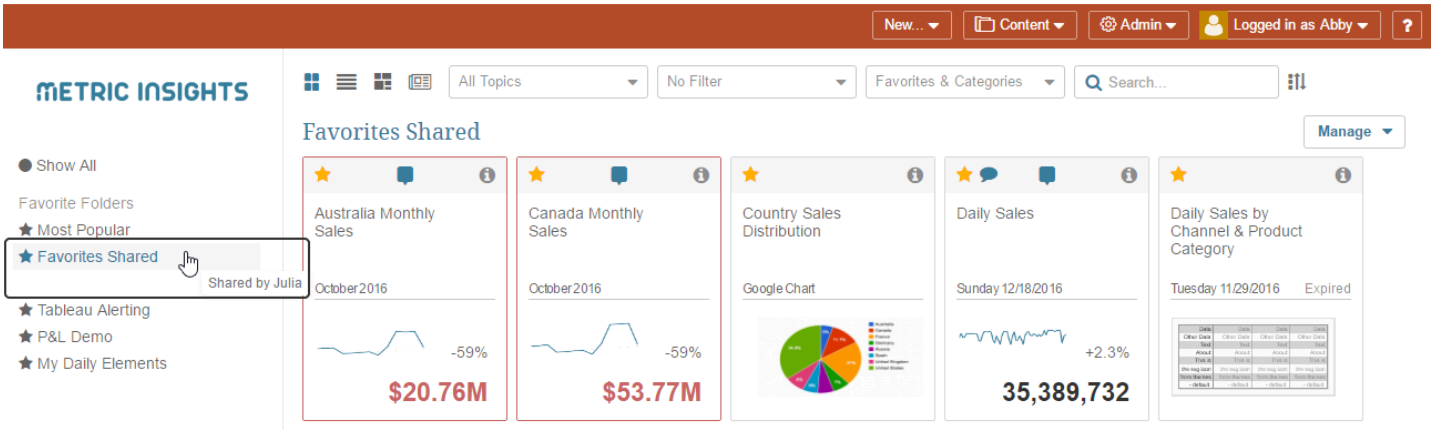


1. You must use the 'Share as' field to select a different name for your folder when it appears on other user's Homepage. This name must be unique across the system. The folder name will not change on your Homepage
2. Toggle between User and Group to vary the pick-list in next field
3. A Pick-list of 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

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



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 change 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?

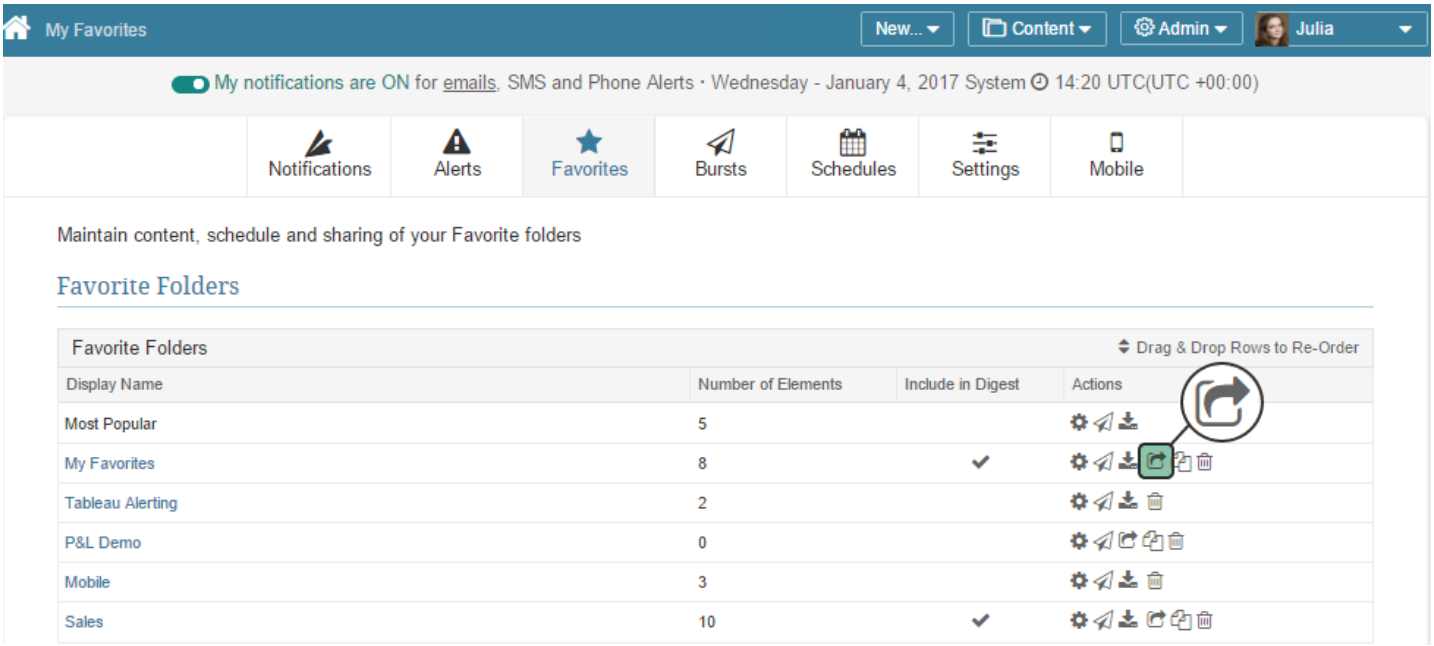
Add (or Delete) Elements to a Favorites folder

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



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.

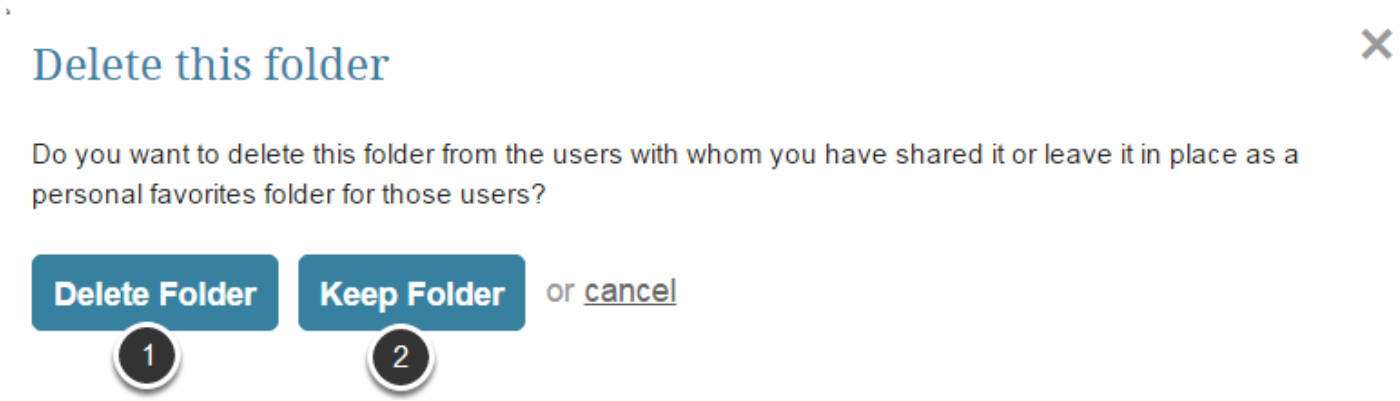
The *Share List for My Favorites* pop-up opens.

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

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



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

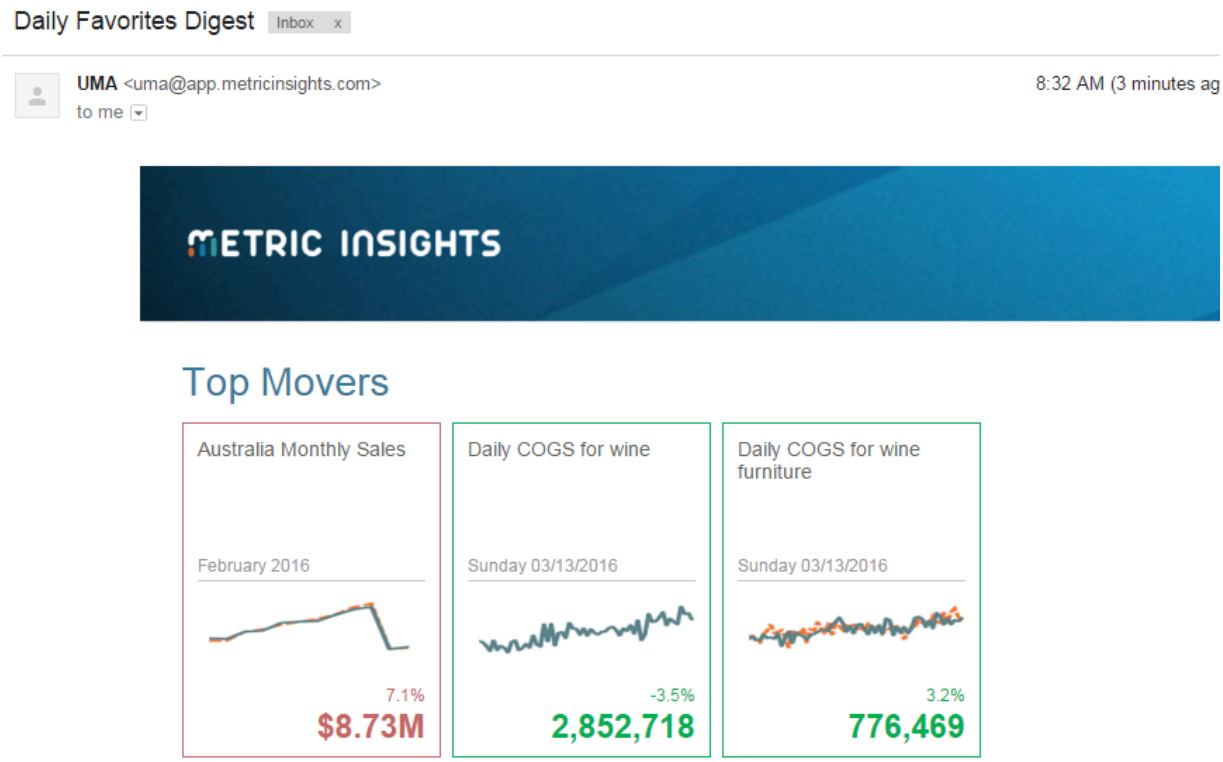
For more information on Favorites, see: Favorites - Overview

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.

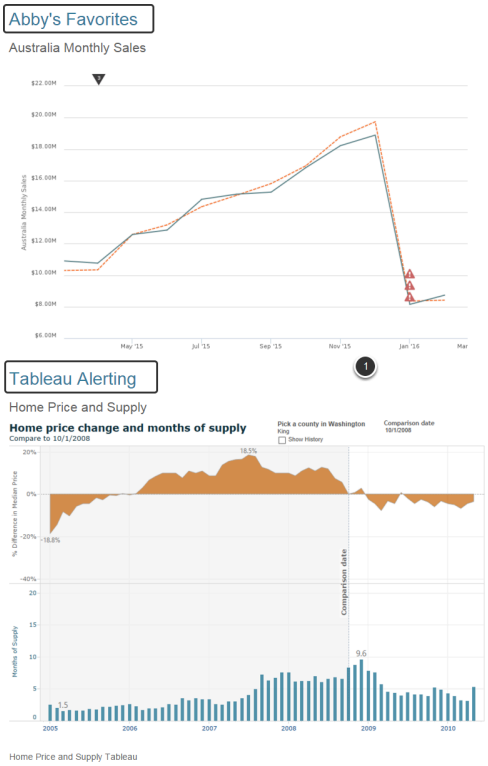
NOTE: your company may have customized Digest templates, so the format may not be exactly as show below

Example using the Default template (Favorites with Headlines)



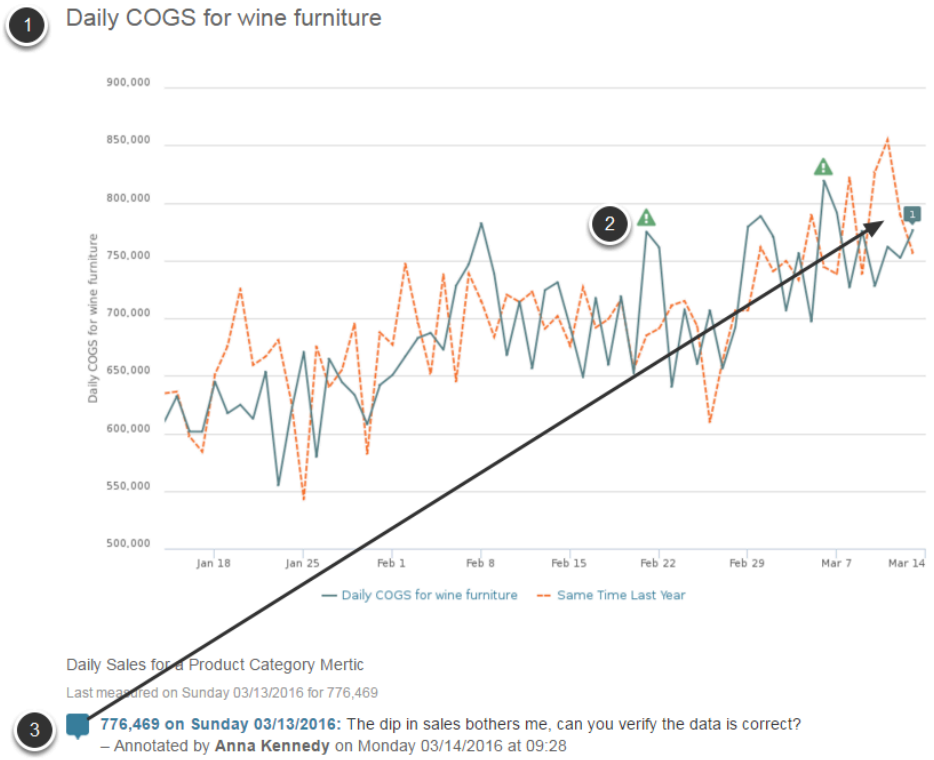
In this template, the most active elements will be highlighted in the **Top Mover** section

Separate sections for each Favorites folder



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"

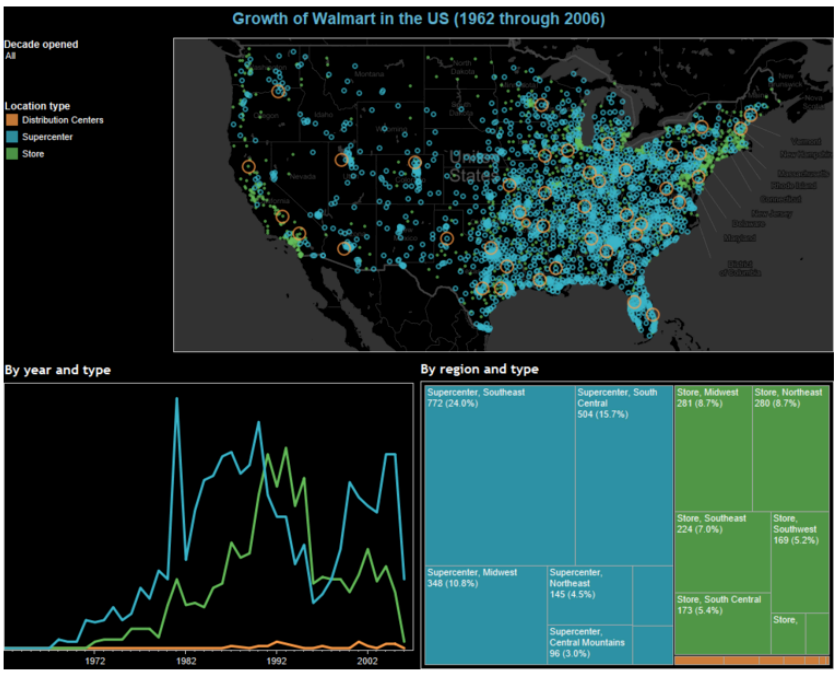
The 'Body' of the Digest contains a Chart View and links



1. 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

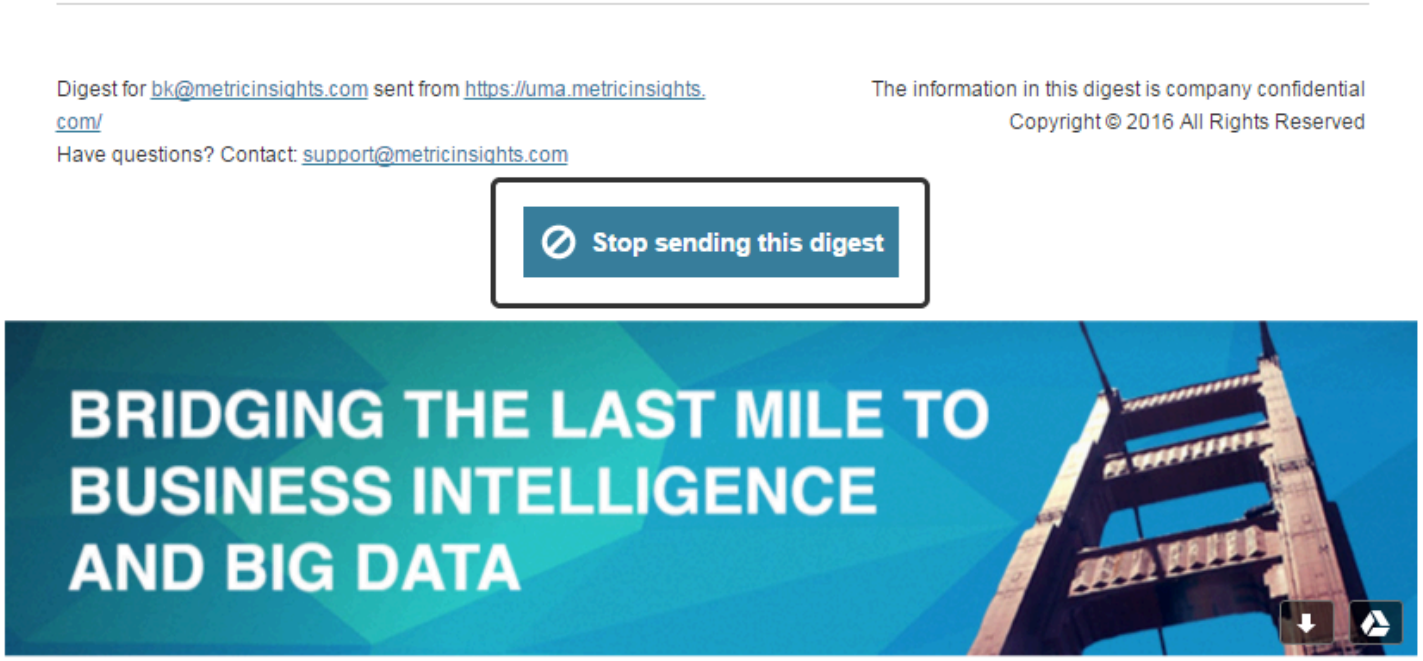
1 Sales / Growth of Walmart



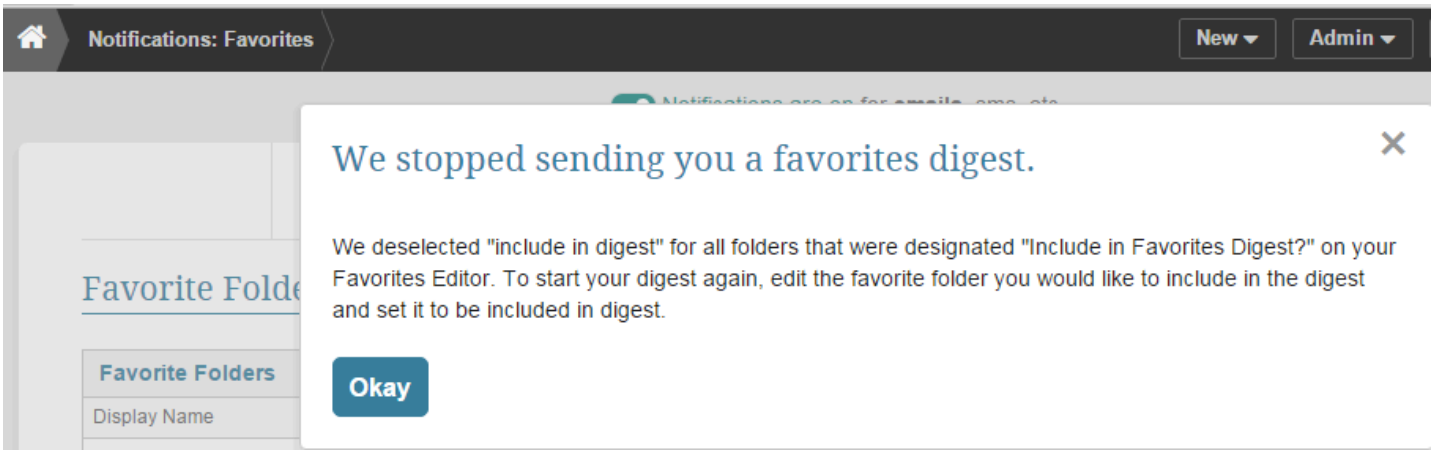
2 https://tableau-prod.metricinsights.com/views/Sales/GrowthofWalmart

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



Result of 'Stop Sending this digest' link



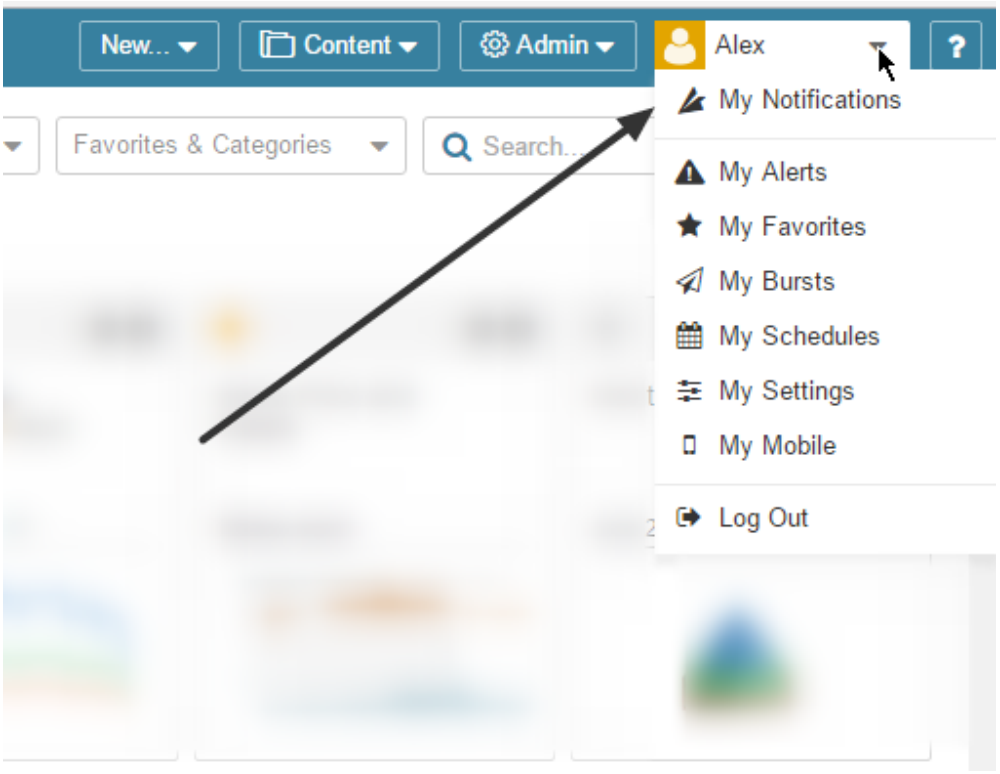
If you select to **Stop sending this digest**, you will be transferred to *Notifications: Favorites* screen where the included folder(s) will have been unchecked. Note that you can restart your digest again at any time.

6.10 Requesting a 'Daily' Favorites Digest

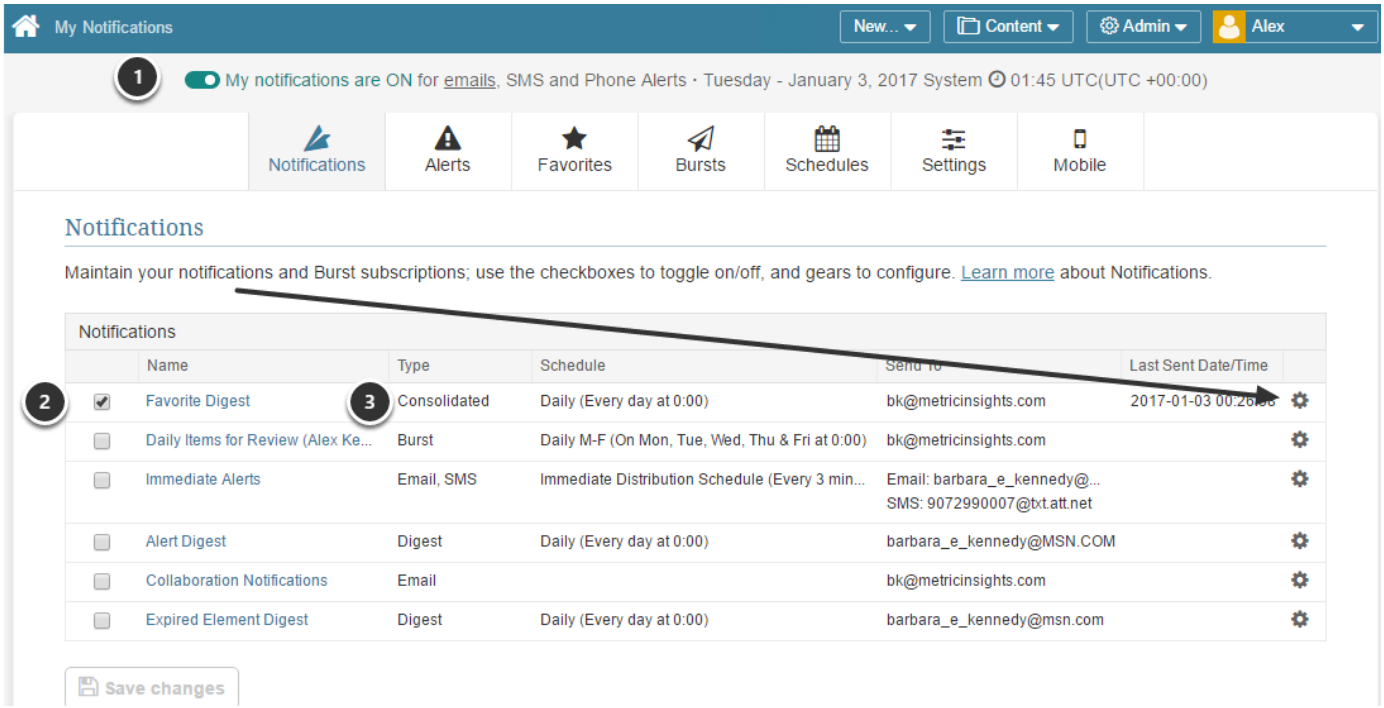
The following steps show how to request a 'daily' email digest to inform you of any changes to elements in one or more of your Favorites digests.

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



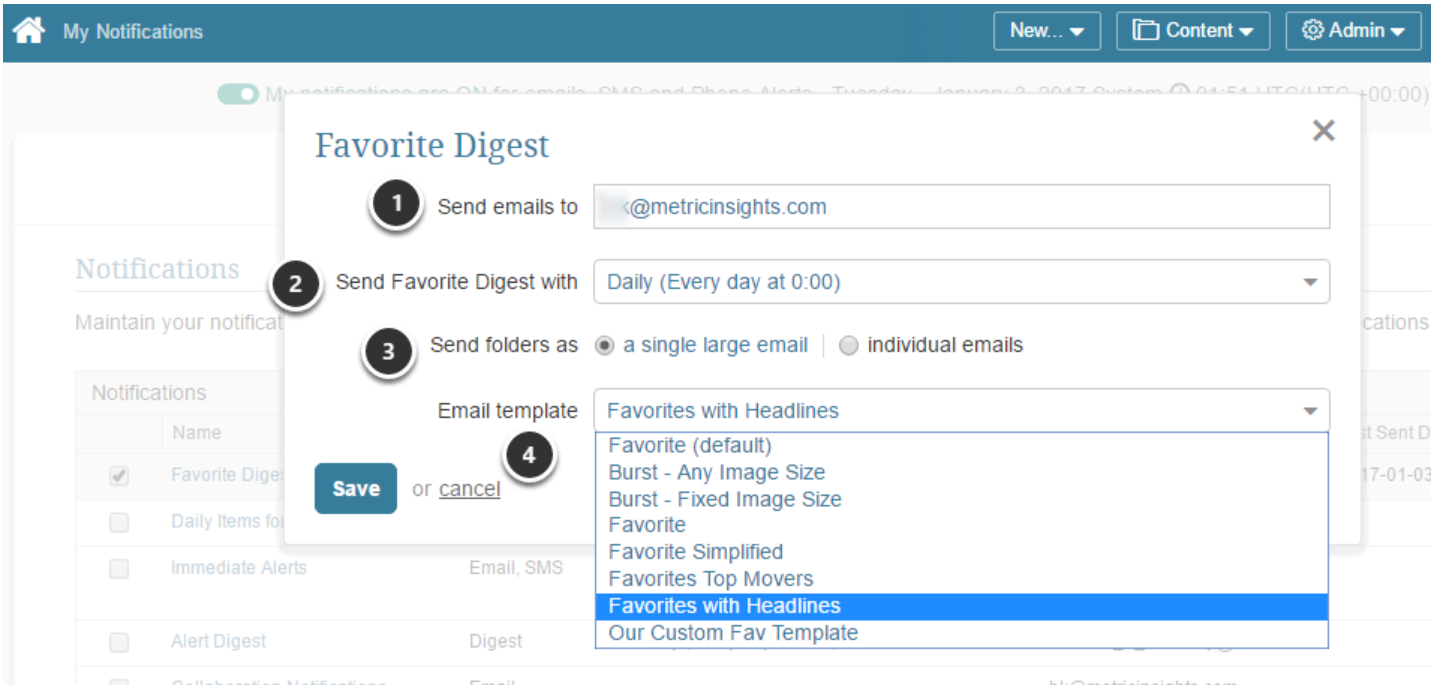
2. To set options for receiving a Favorites Digest



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

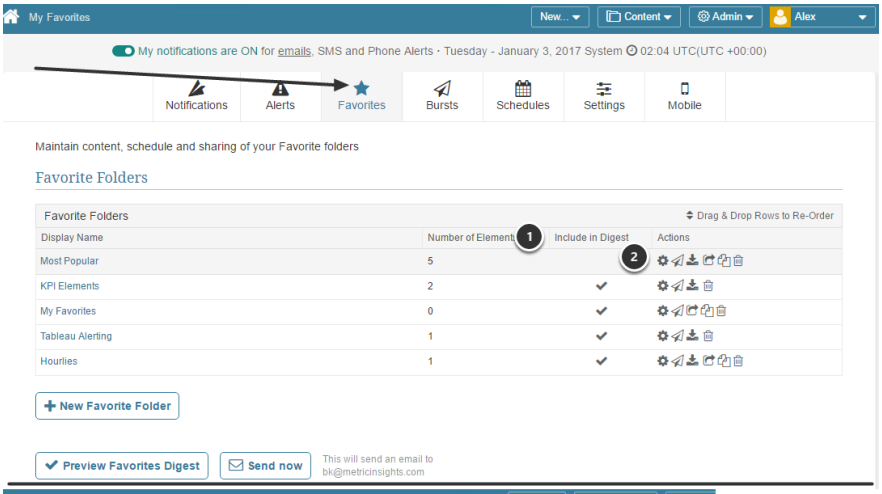
3. Adjust options in pop-up

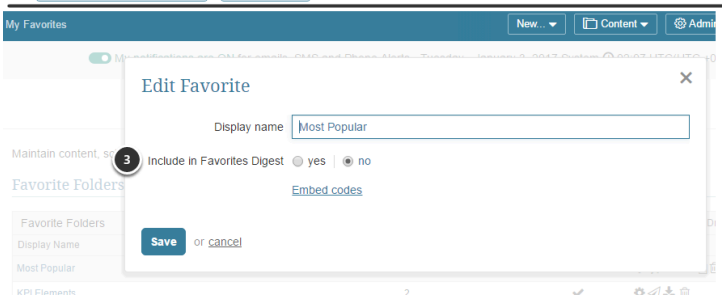


1. **Send emails to** will default to your the email associated with your logon - you may enter any valid email here
2. Select a time when you wish to receive the Digest (drop-down will display both a Public and any Private Schedule you may have)
3. You can select to receive a **separate** digest for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

See this article for more information on Setting up Private Schedules

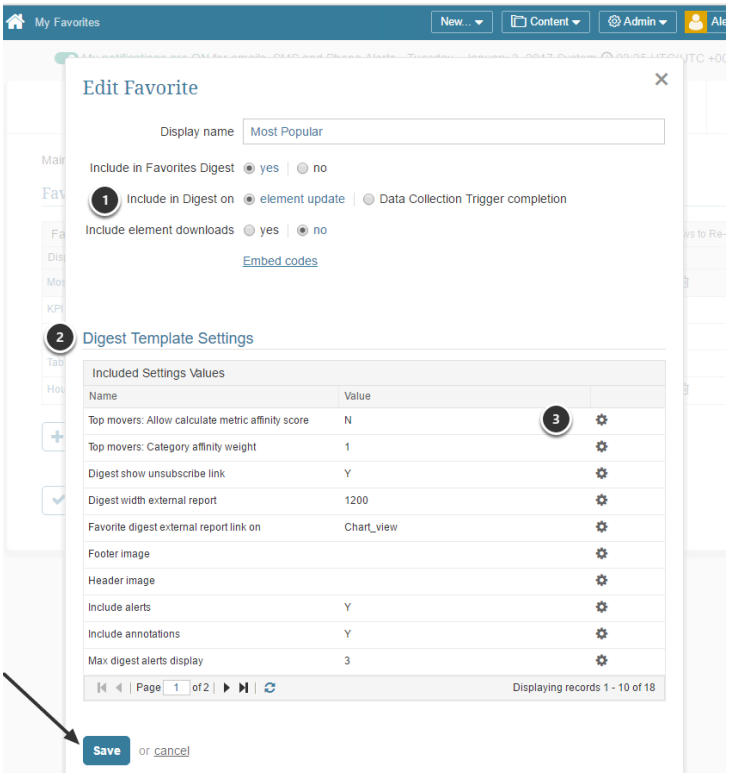
4. Access 'Favorites' from top line of Notifications





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?**

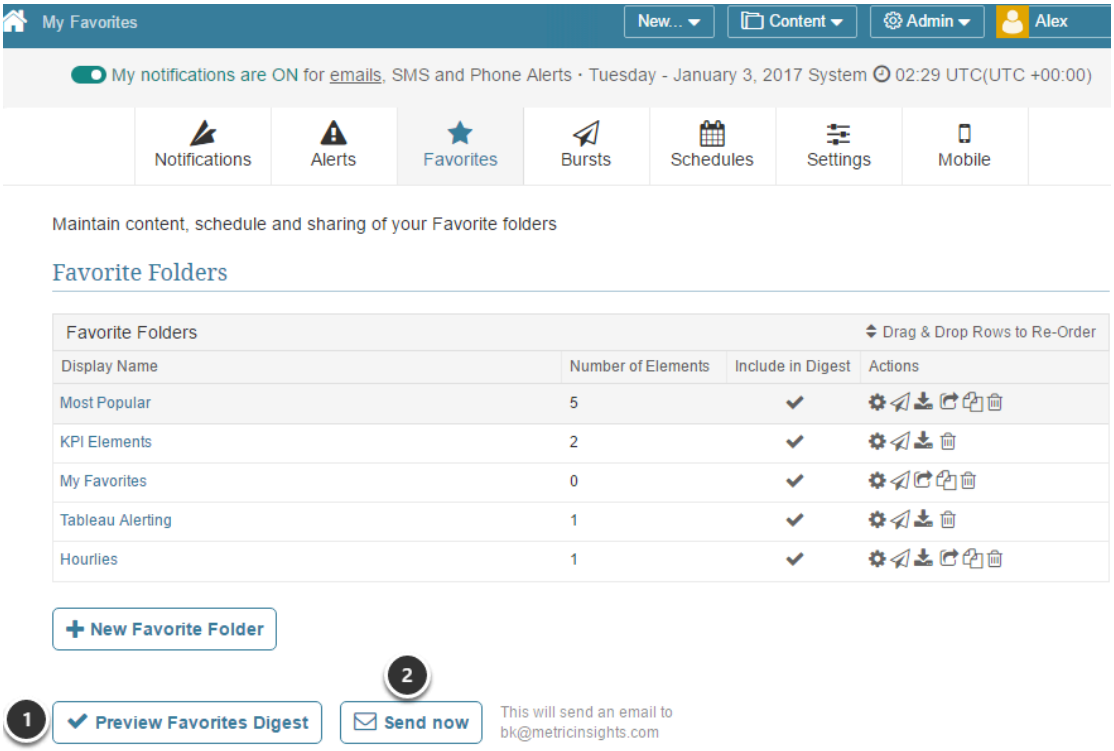
4.1. If you select " Yes" to Include in Favorites Digest, further options are available for customizing each Digests individually



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

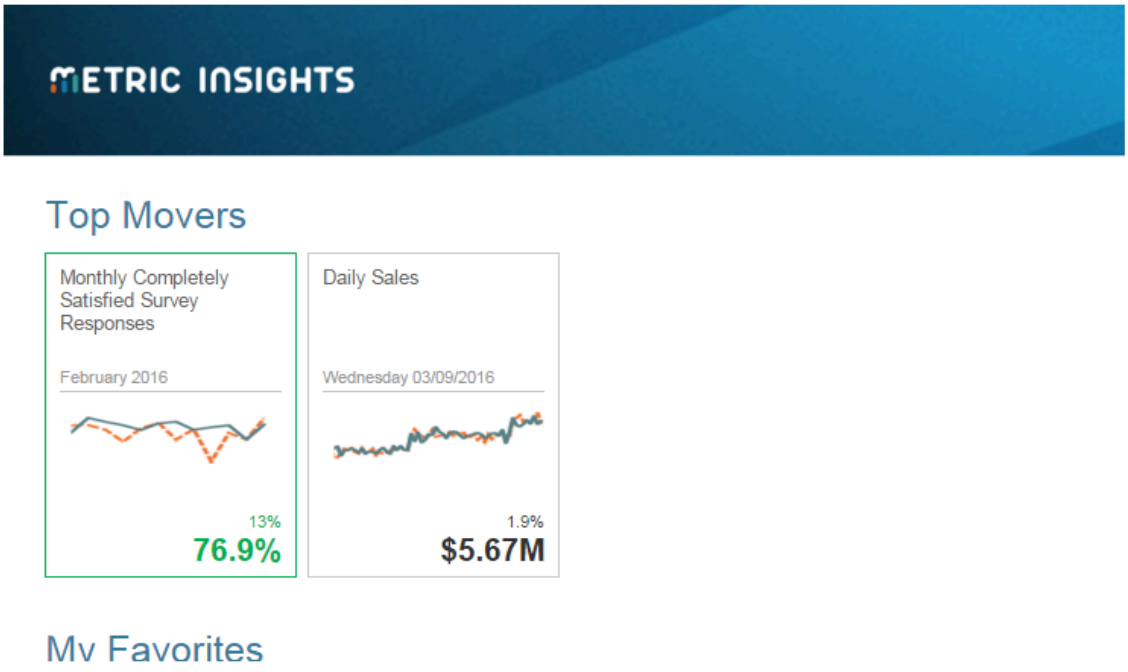
When completed, **Save**

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



6. Example of a on-line preview

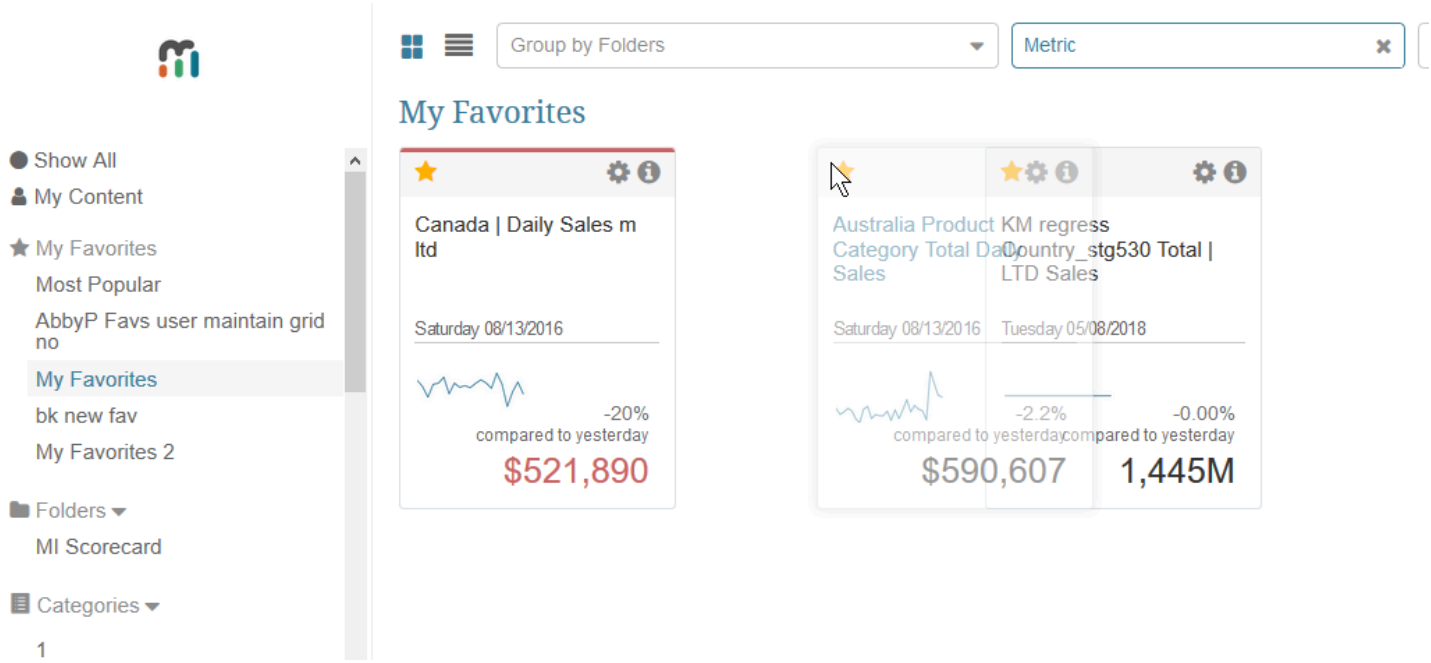
Preview favorites



Scroll to view entire Digest

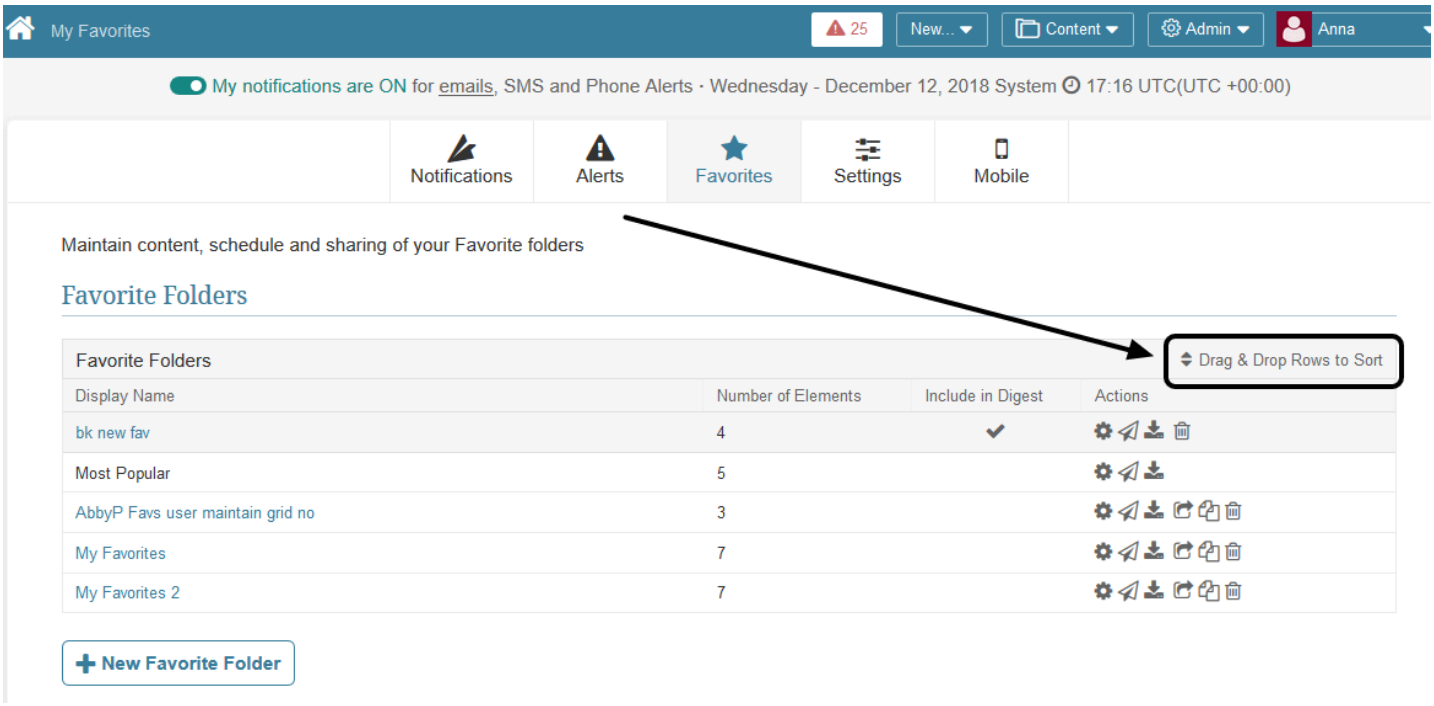
6.11 How do I change the order of elements in my favorites daily digest emails?

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:

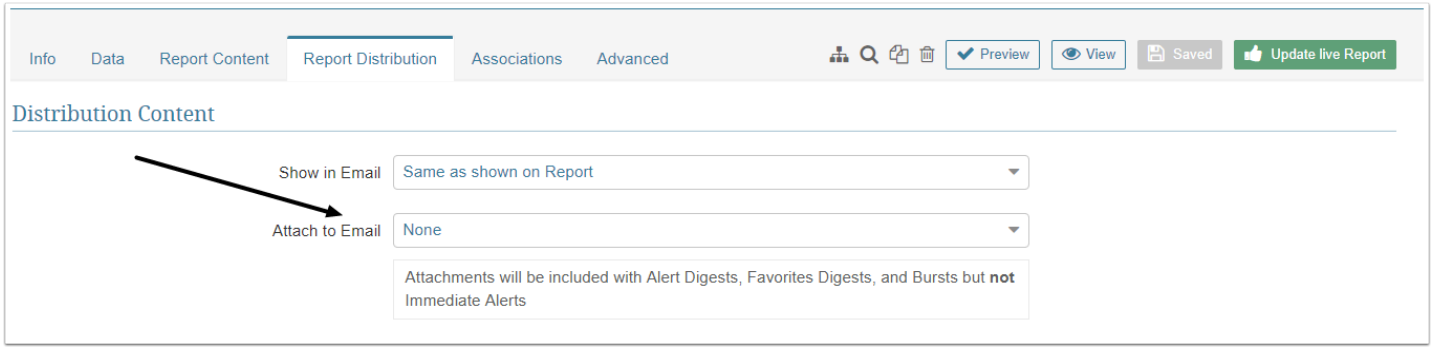


The order that you specify in the favorites folder will be preserved in favorite digests. (Note: If you have shared a favorite folder with other users, you will need to re-share it with them after your changes so they will also see the same order

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

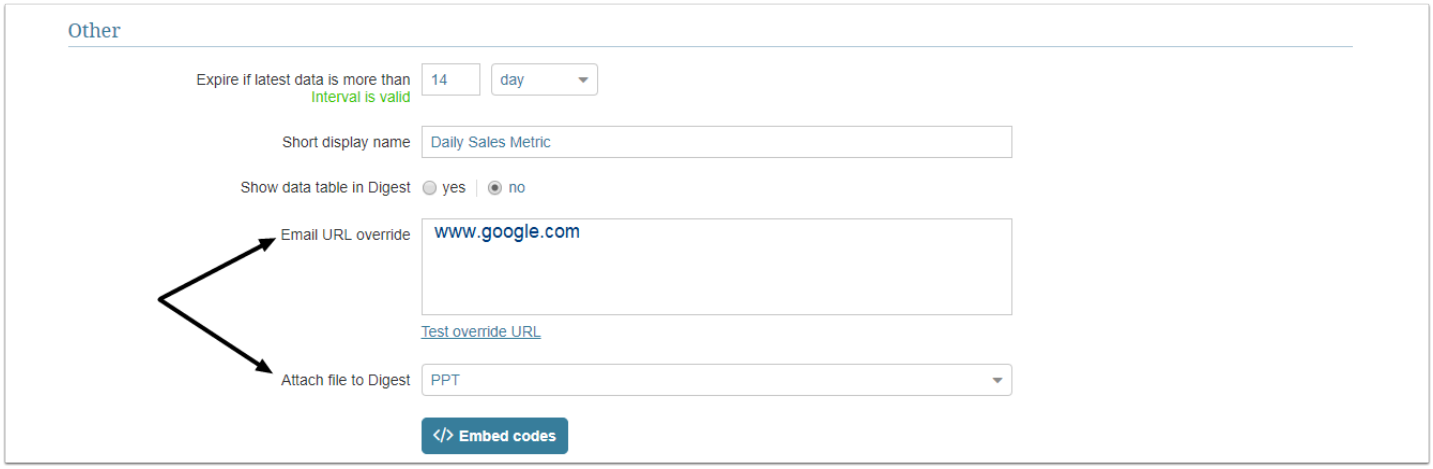
Here is how to include an attachment of your element as a PDF, CSV, PPT or Excel file. You can select the required file type from the dropdown in the Editor. The System defaults to *None.*

1. Setting Reports



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

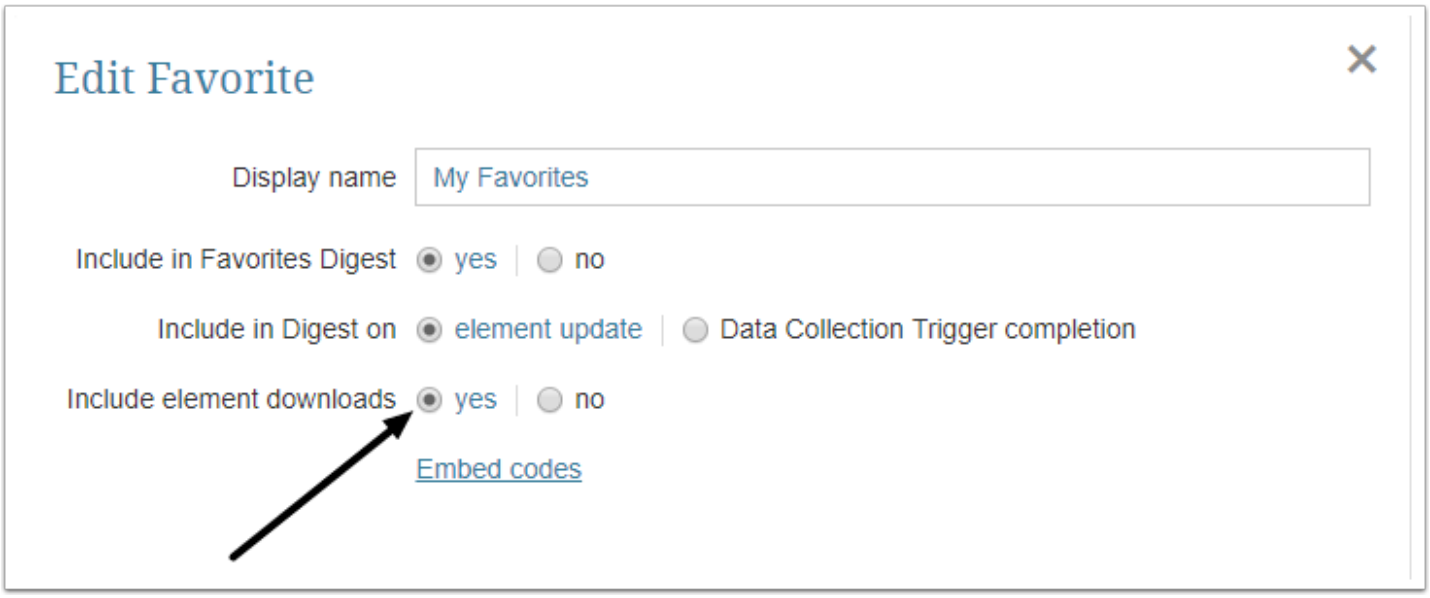
2. Setting on Metrics



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

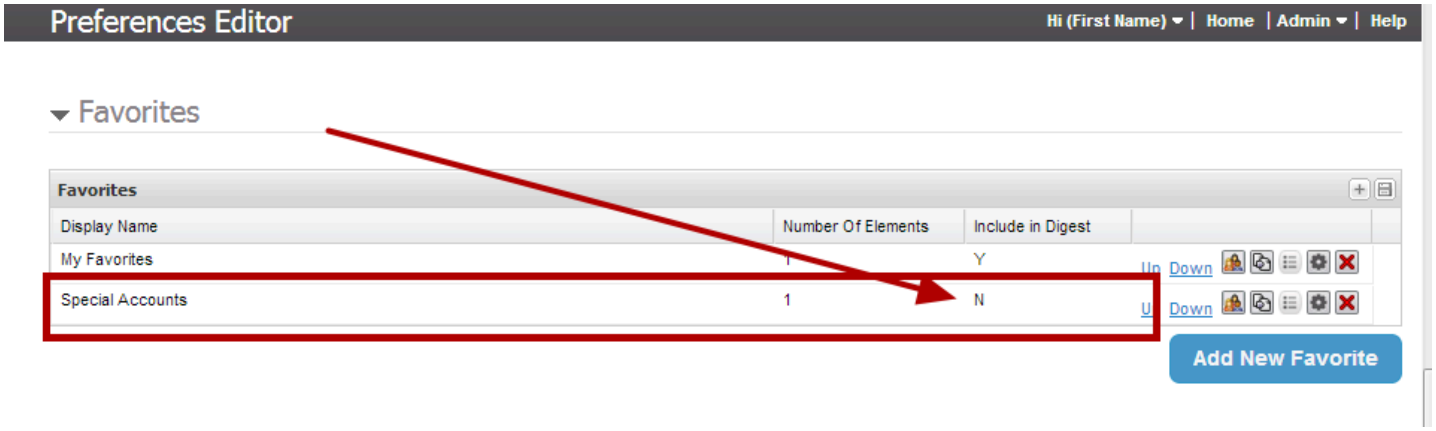


Make sure to "Include Element Downloads" for the favorite folder. Go to your Favorites page and click on the gear to the right to see these settings.

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

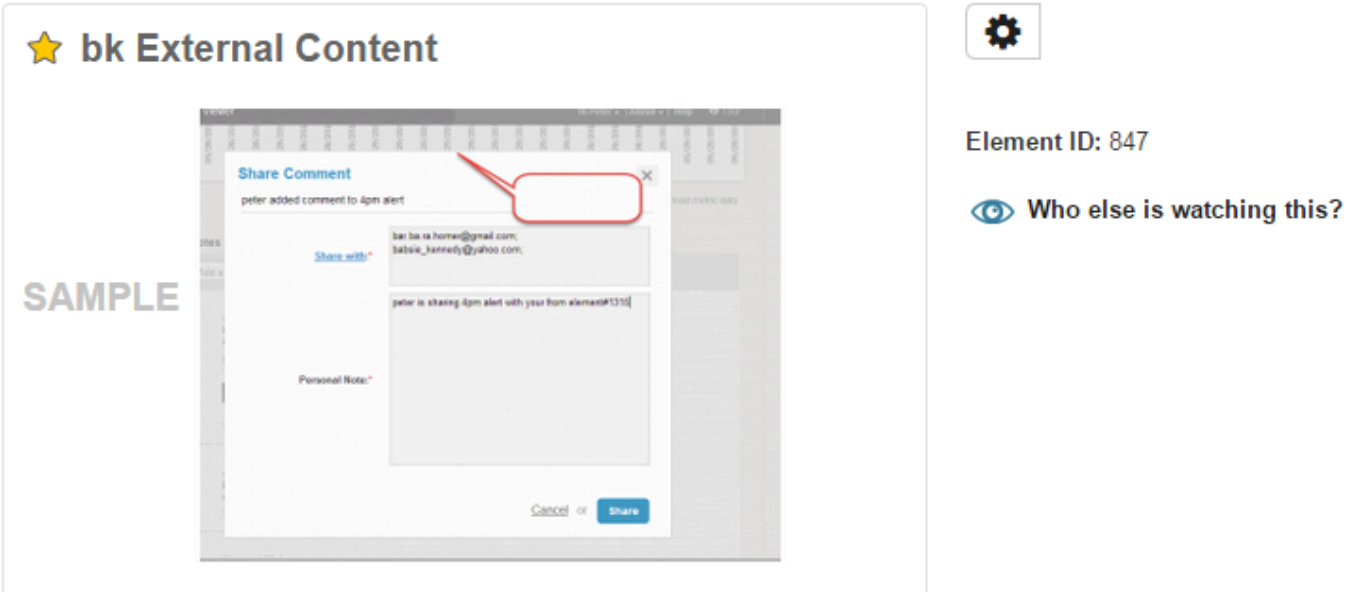
There are four different sets of rules that control what is displayed in your Favorites Folder Digest. You can verify these setting using the steps below.

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



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



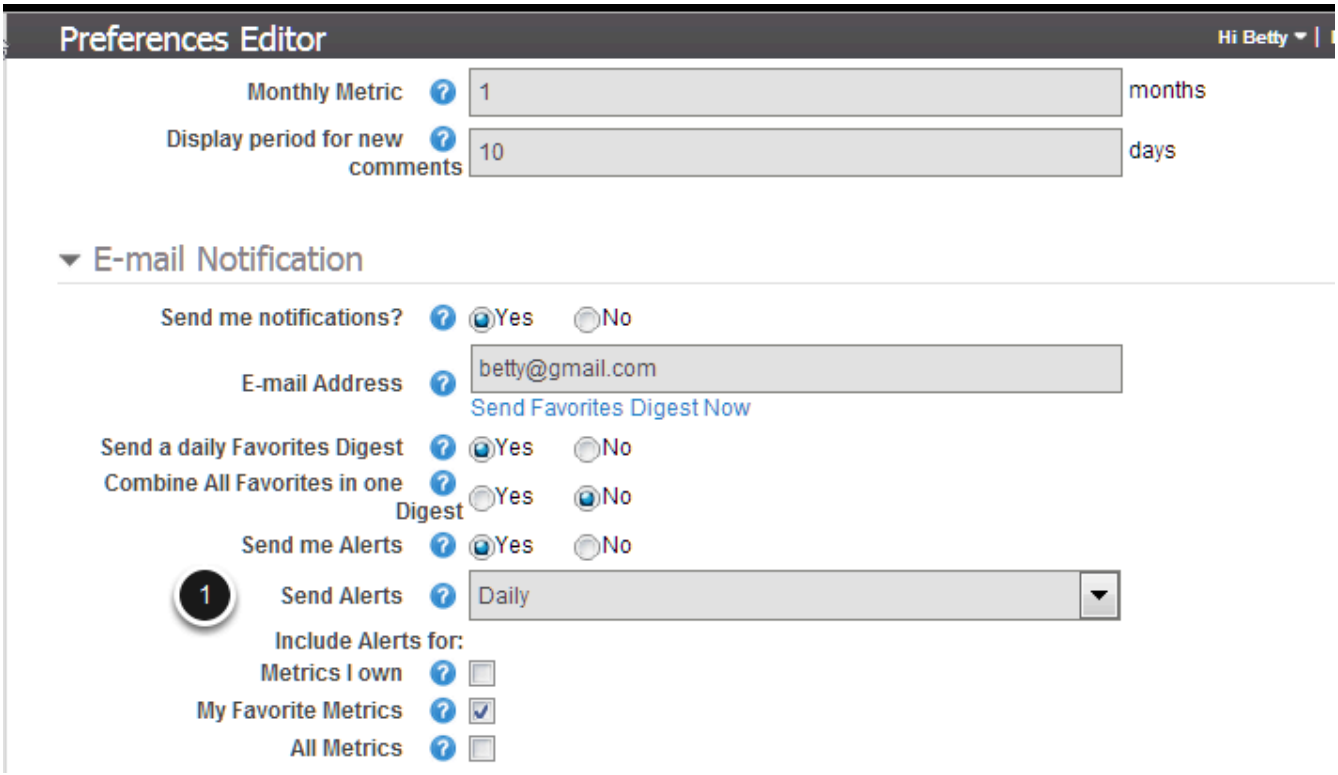
Digests are designed to inform you of changes in your data. **External objects** are one-time snapshots of data, and so are omitted from Digests as they never change

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.



1. These setting 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.):

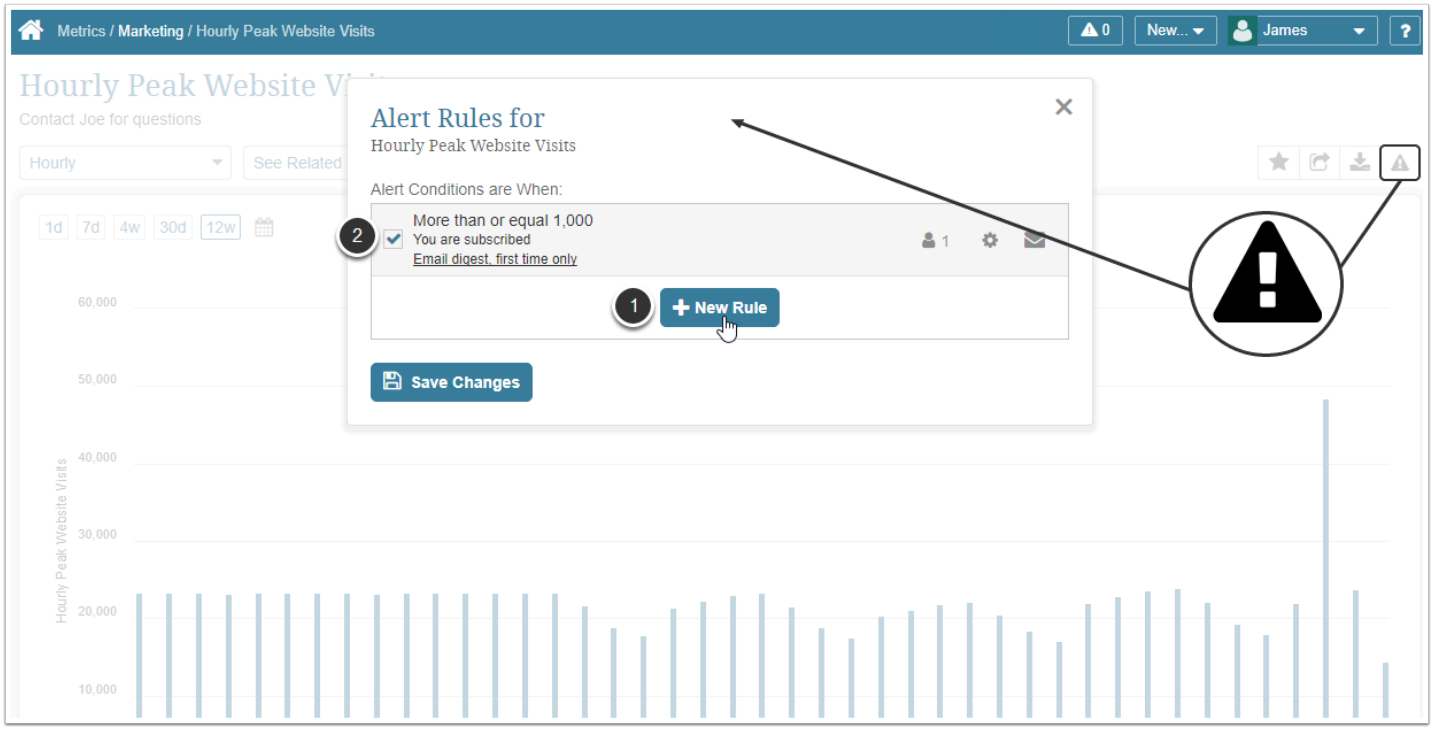
- KPI Alerts
- Report Notifications
- Global Alerts

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

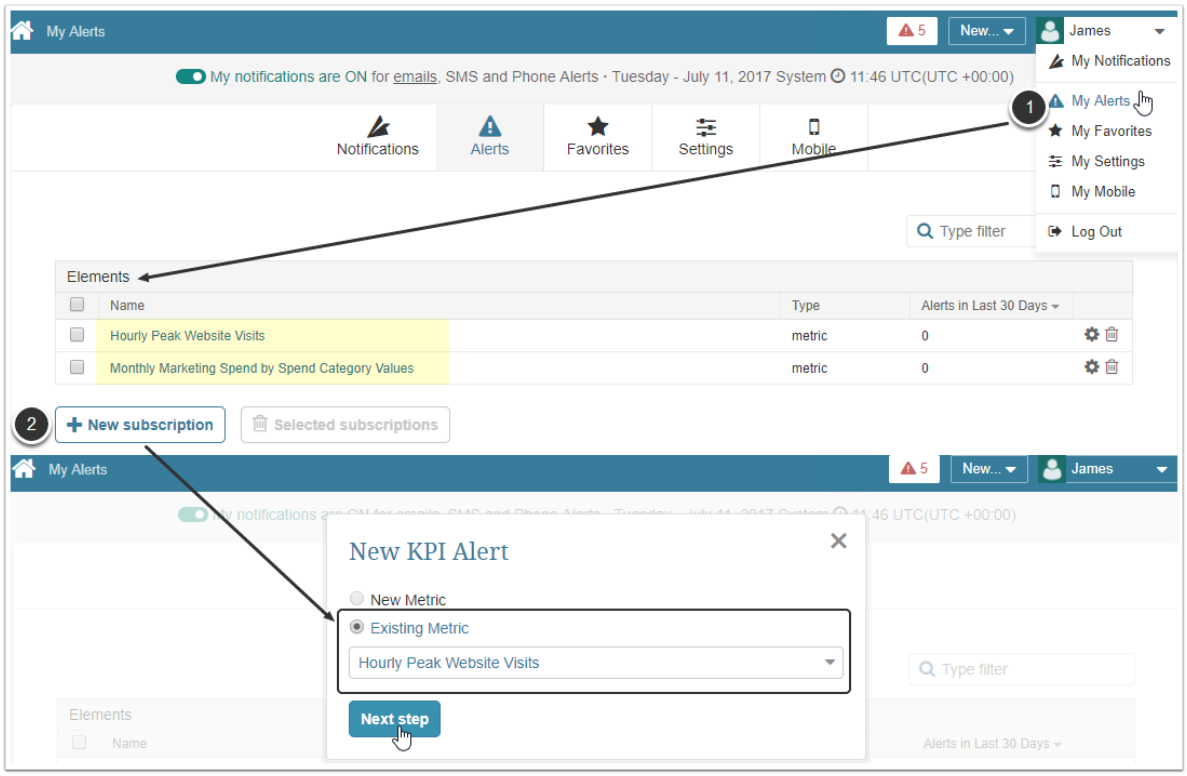
Permissions: Regular Users can create **KPI alerts** on any Metrics they can view if they have the following Privilege assigned to them either individually or via a Group membership: **Create Custom Alert.** Admin Users can assigning this Privilege at: *Admin > Users > User Editor > Info tab > Privileges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

Available at: *Metric Viewers.*



1. 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.
2. 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?



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.

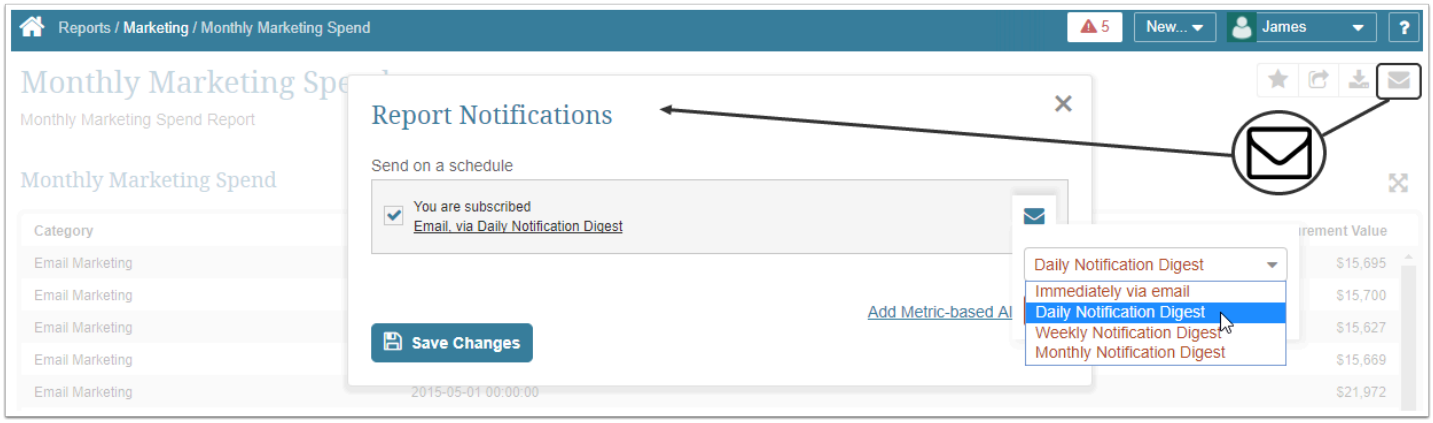
   For Regular Users the only valid cjoice is **Existing Metric**, so from the drop-down list below choose a Metric to which an Alert Rule should be applied and click **Next step**. Then, define the Alert criteria. For details refer to: [KPI Alert Rules] Wizard, types, criteria, user subscriptions

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.

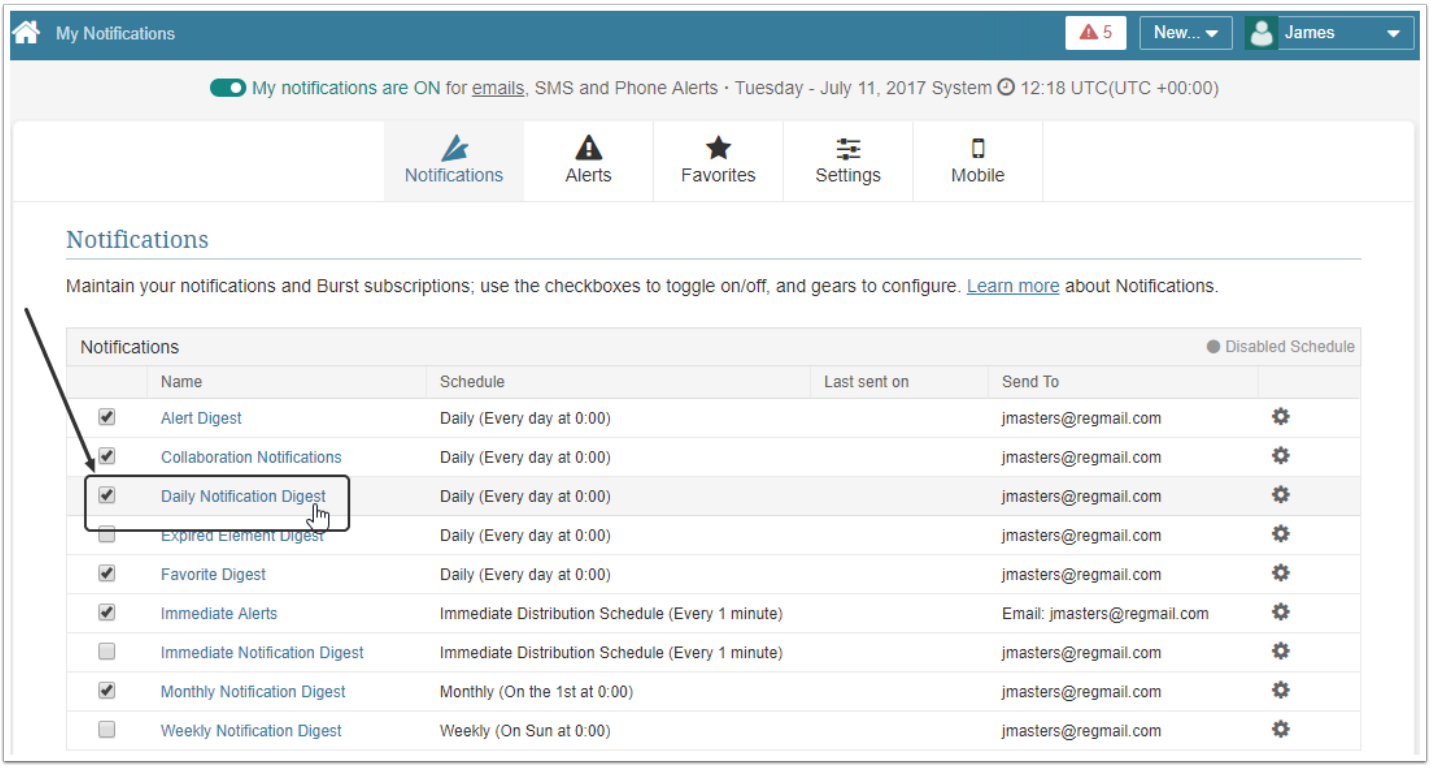
Available at: *Report Viewers.*



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:



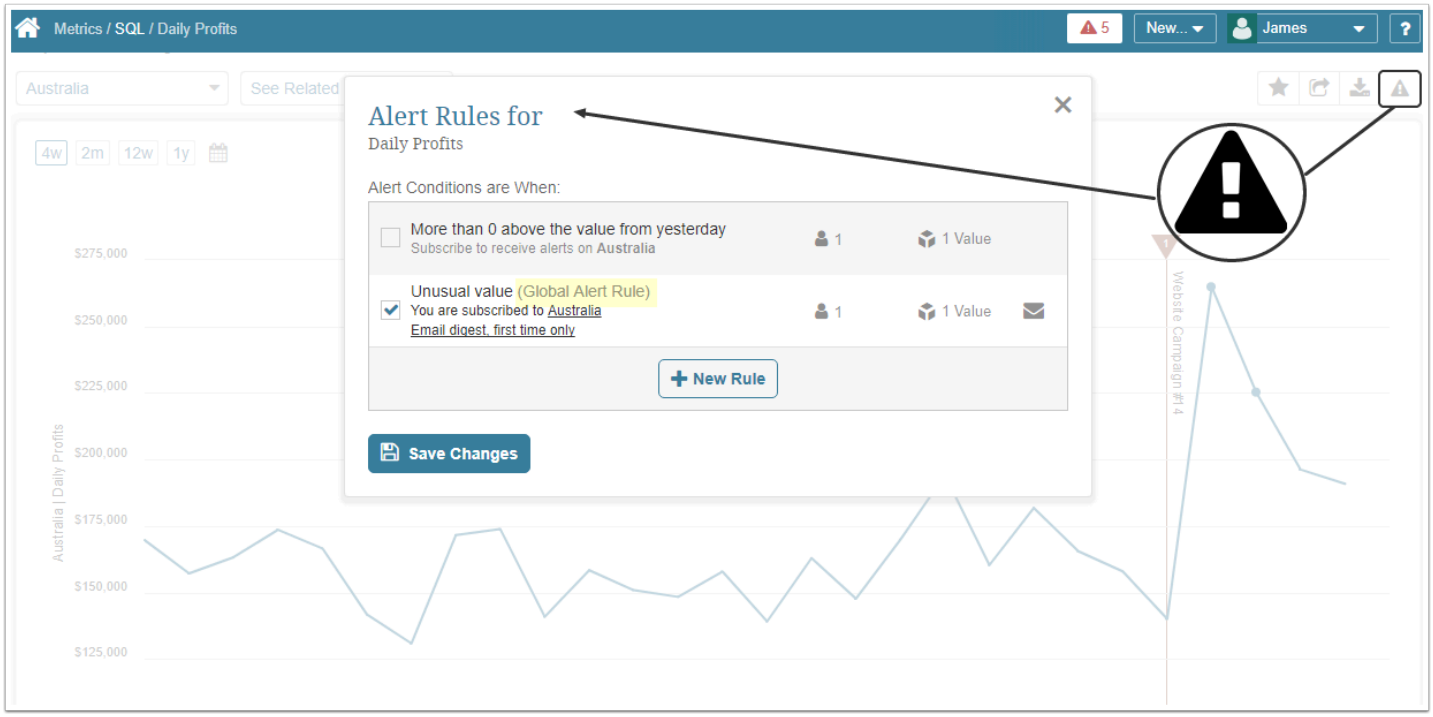
NOTE: Distribution schedules for these Digests are defined globally and cannot be changed according to personal User Preferences. For example, if a Daily Notification Digest is set up to be sent "Daily (Every day at 0:00)" by the Admin, every User subscribed to it is going to receive it at the same time. 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)

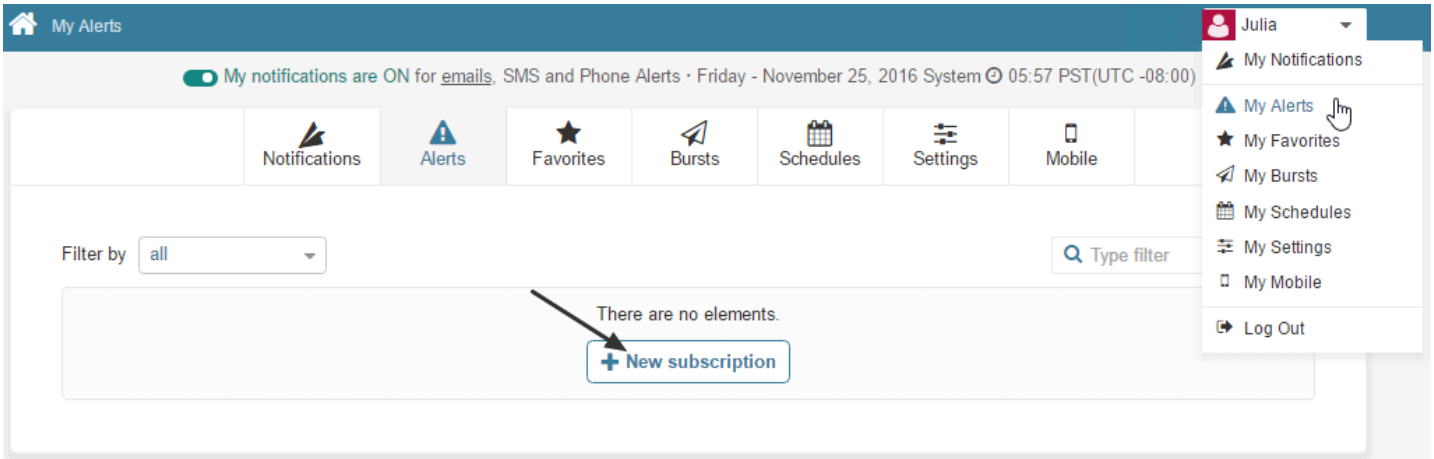
There are 3 main types of alerts, but only Admin and Power Users are allowed to create the last two:

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

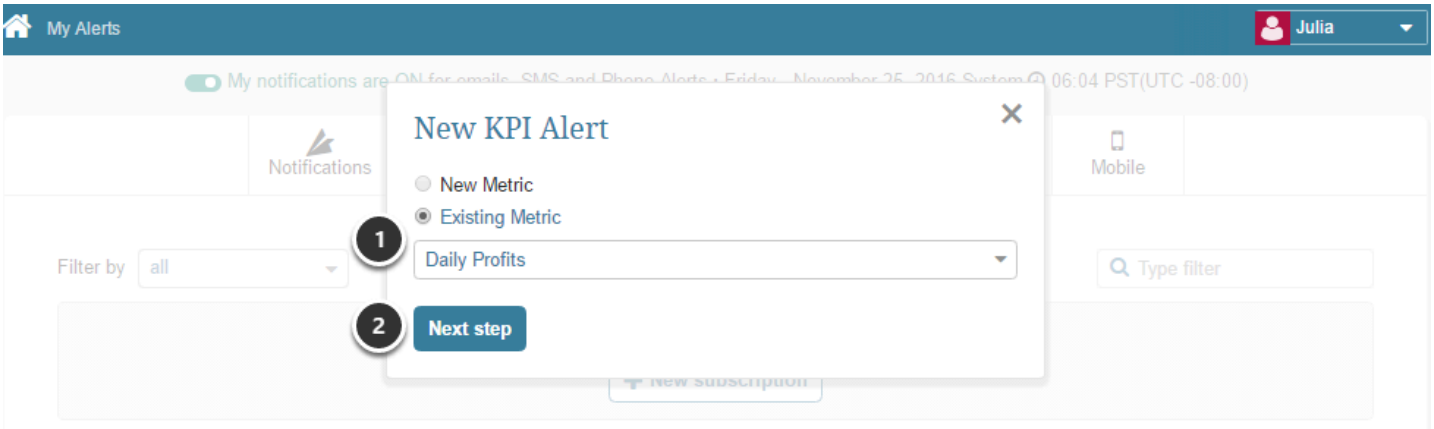
Alerting was enhanced in Release 5.1 - see the updated articles in Chapter Alerting in Version 5.1 and beyond

1. My Preferences > My Alerts



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

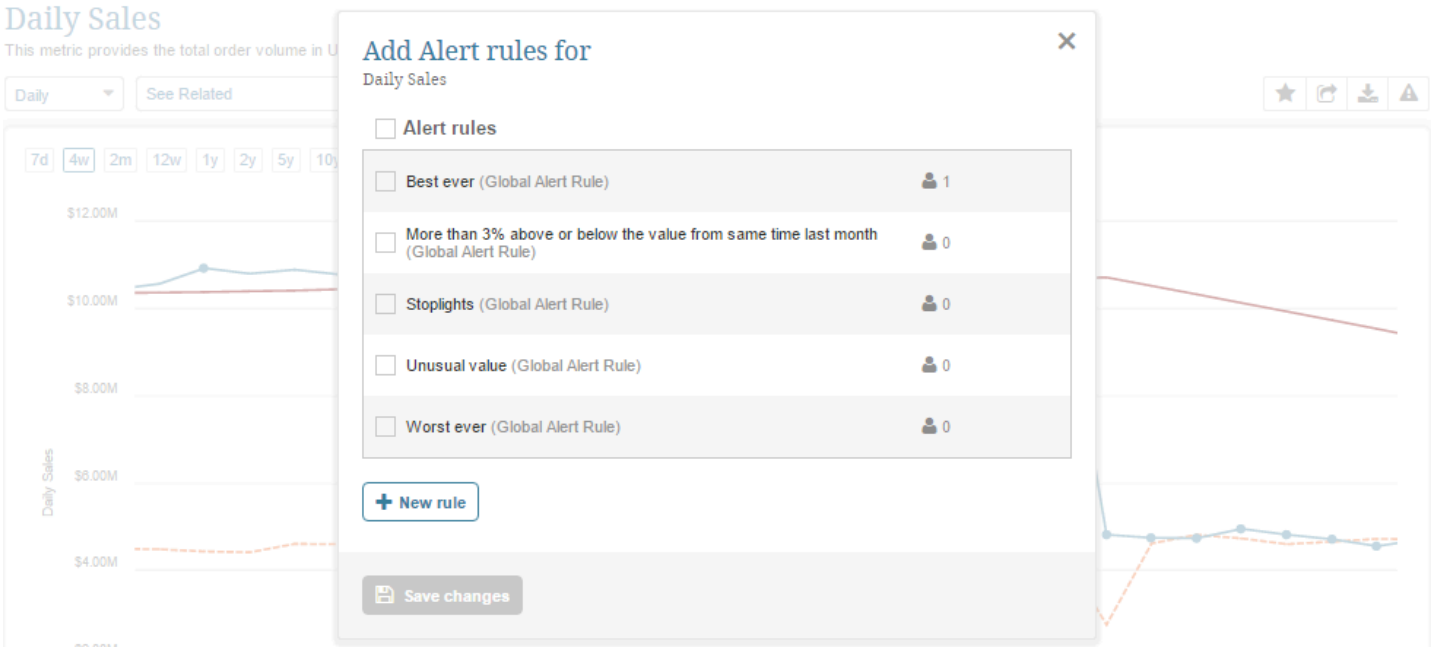
1.1. Only valid choice is 'Existing Metric' for regular Users



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

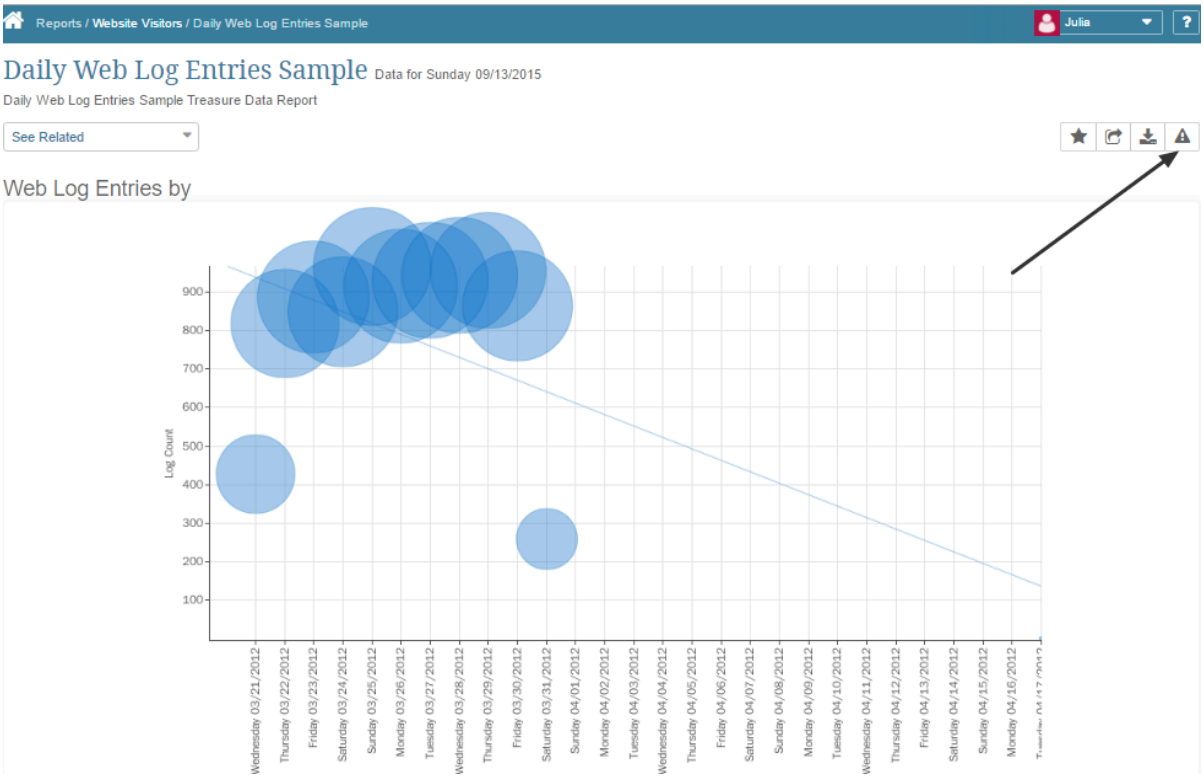


Select one of the exisiting rules or click **[+ New rule]** to access KPI Alert Rule wizard. See more at [Basics for the Alert Wizards - KPI Rules]

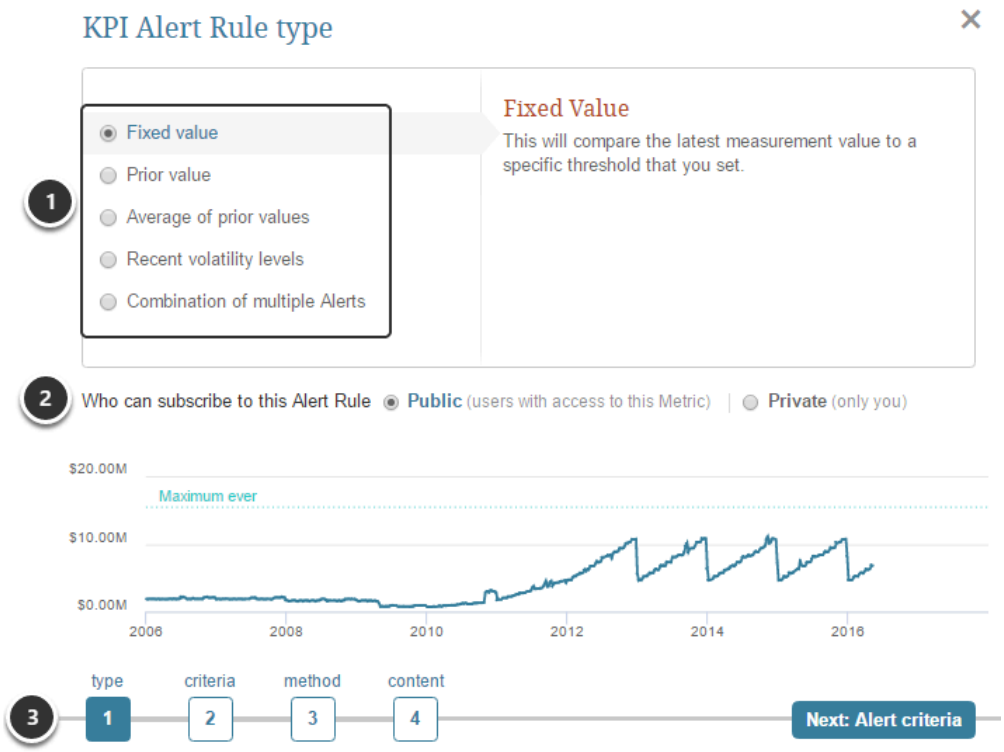
3. From Alert icon on any Report

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.



4. Basics of KPI Alerts



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