

Release 5.6.0/5.6.1/5.6.2

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

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

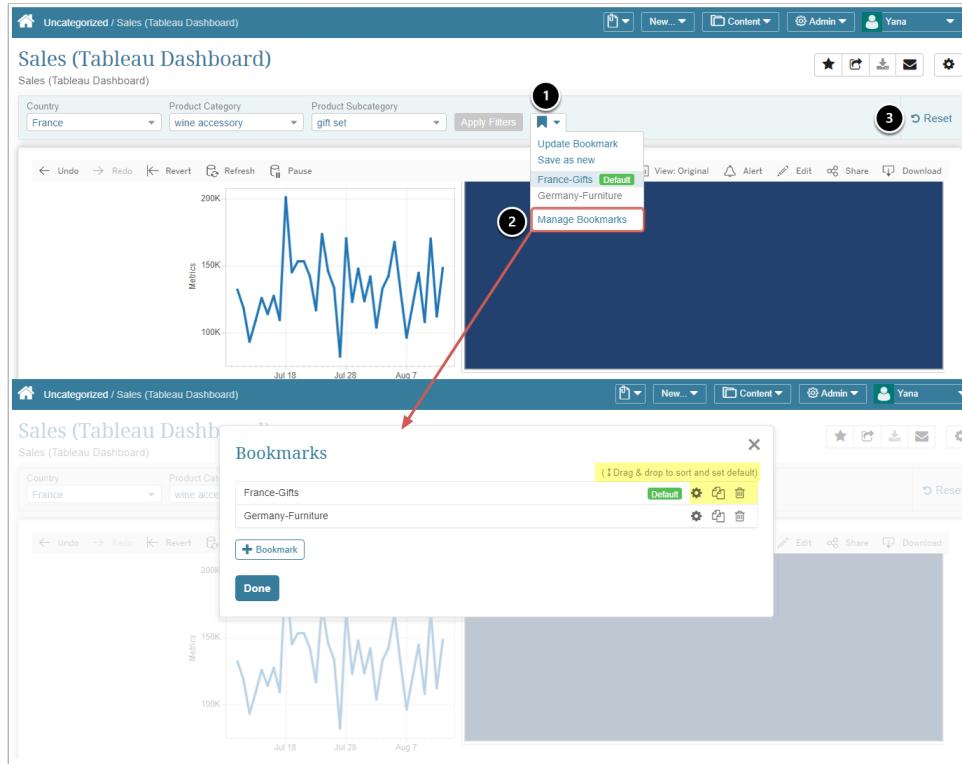
Major Features

1. Filter Bookmarks & Filter Defaults for External Reports

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

1.1. Managing Bookmarks

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



To customize Bookmarks:

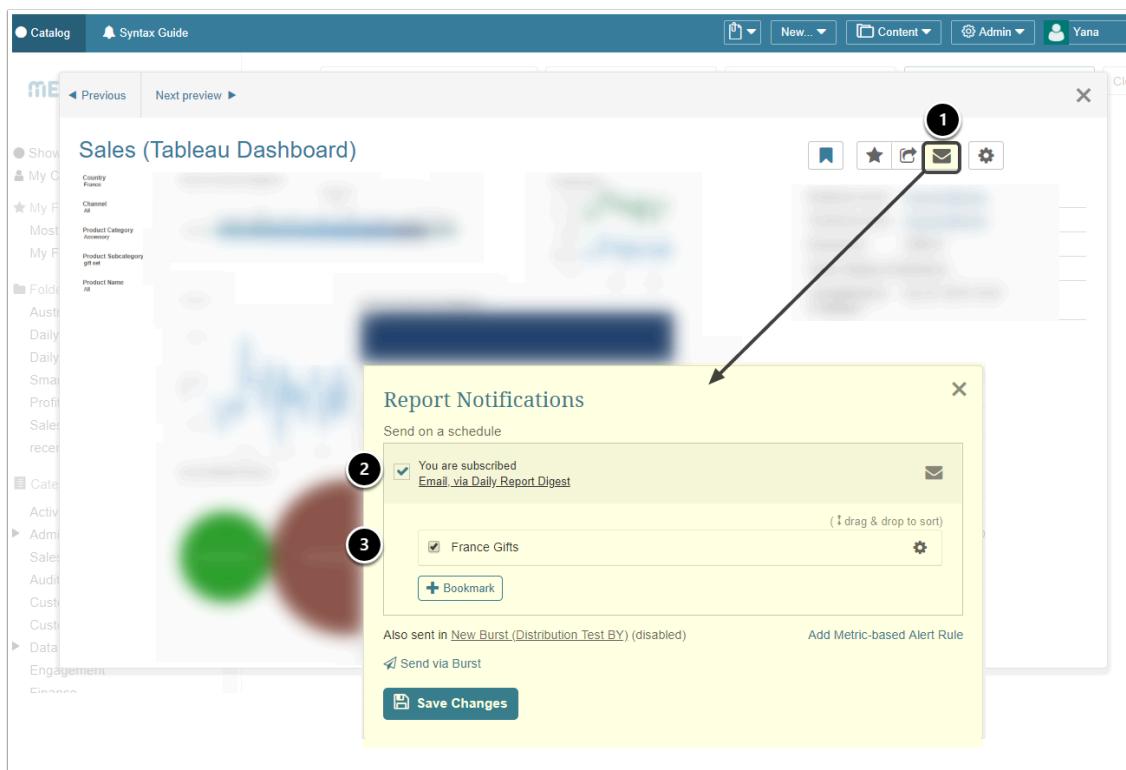
1. Open the **Bookmark menu** dropdown
2. Select "**Manage Bookmarks**"

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

1.2. Subscribing to Notifications

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

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



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

- Click the Notification icon**
- Specify the Report Notification**
- Select a Bookmark**
- Save Changes**

1.3. Setting Defaults

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

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

The screenshot shows the Qlik Sense External Report Editor interface. At the top, there's a navigation bar with icons for Home, New, Content, Admin, and a user profile. Below that is a toolbar with Info, Configuration, Associations, Advanced, Documents, and Collection History. The main area shows a Tableau Worksheet titled "Daily Sales / Sales Dashboard". A "Manage Filters" dialog is open, showing filter settings for "Tableau Filter Defaults". There are two radio buttons at the top: "Same for everyone" (selected) and "Apply based on User Map". Below this are filter definitions for "Country" (2 Values: Australia, Canada), "Product Category" (1 Value: wine), and "Product Subcate...". A link at the bottom says "Sort Filters to change the order of Filters for this External Report." A callout arrow labeled "1" points to the "Edit" icon in the "Manage Filters" dialog. Another callout arrow labeled "2" points to the "Set Filter Defaults" checkbox in a separate "Product Subcategory Filter Defaults" dialog.

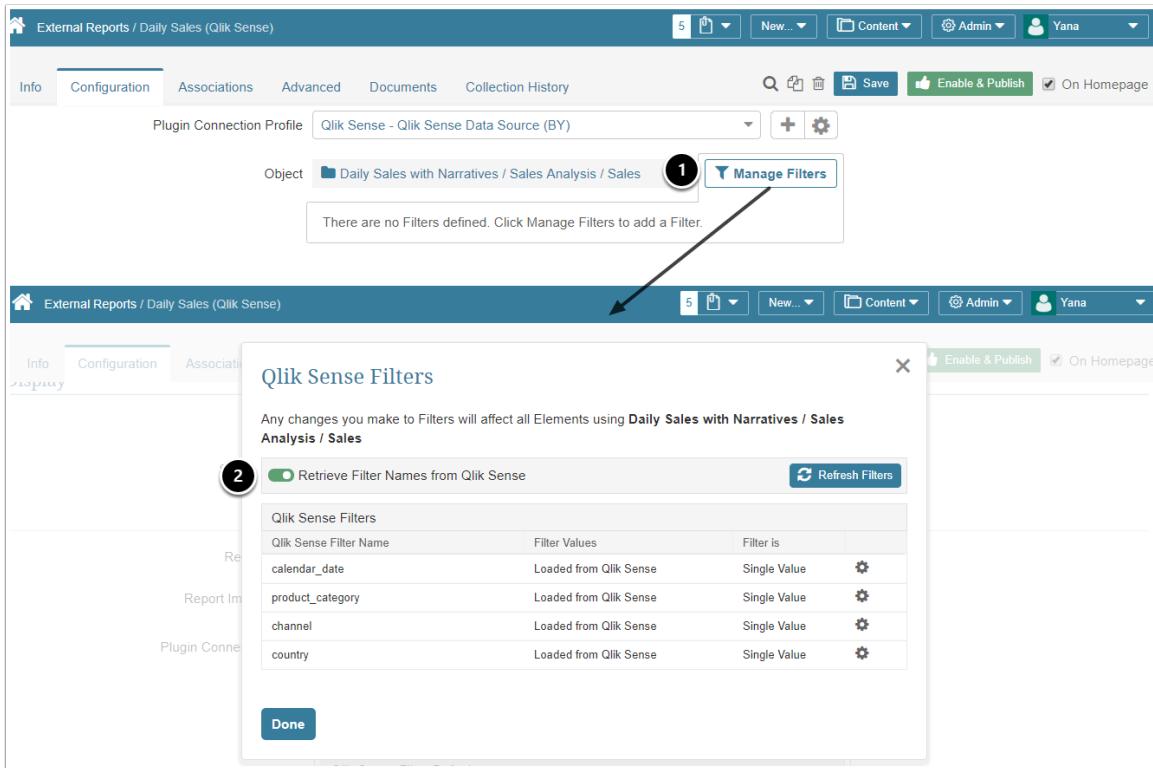
To set Filter Defaults:

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

1.4. Qlik Sense: auto-sync Filter Values

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

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

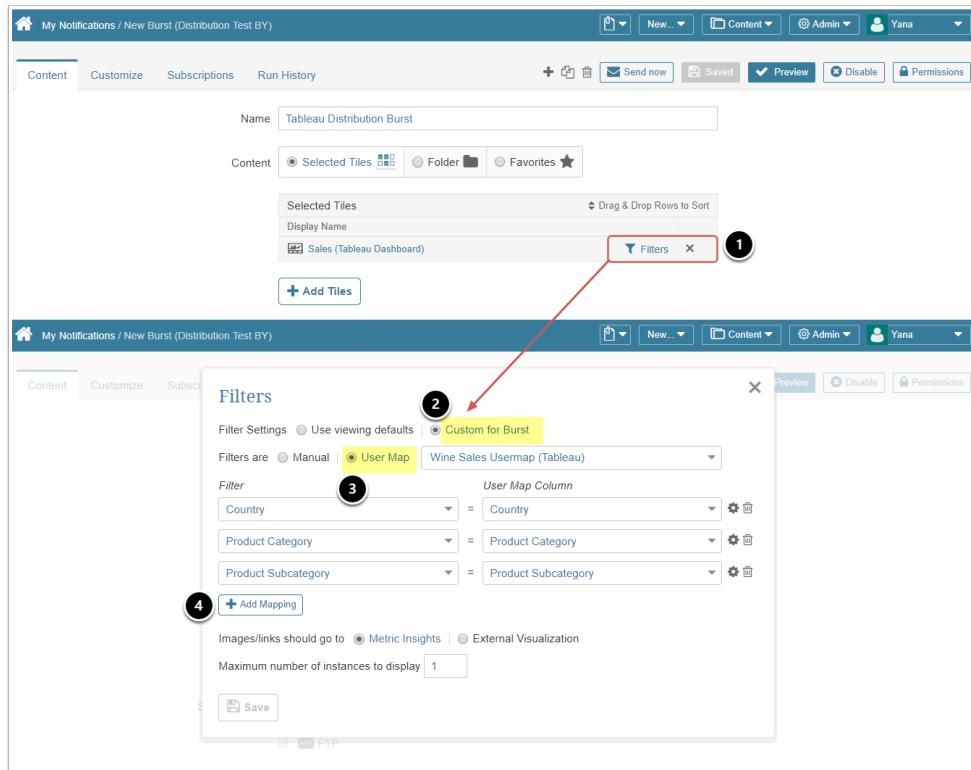


The auto-collect of Filter Values is enabled in the **External Report Editor**. To activate the setting:

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

2. External Reports: Enterprise Distribution

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



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

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

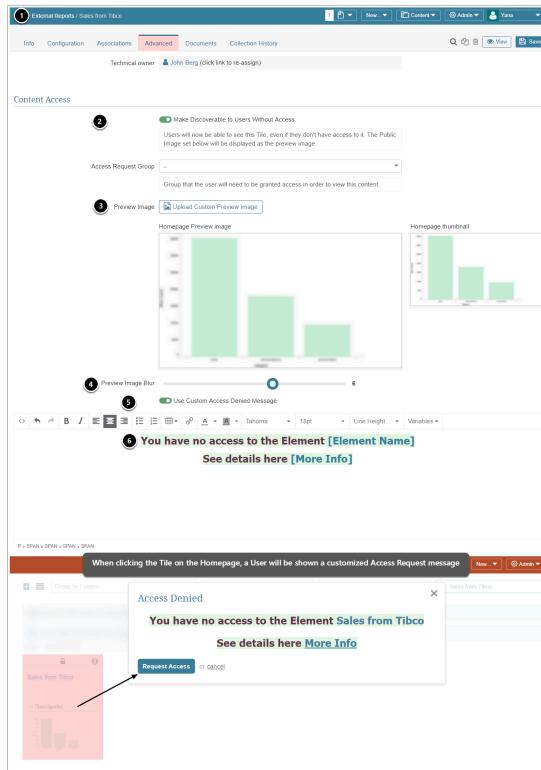
3. Custom Access Request messages

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

1. Element level
2. Category level

For more information, refer to [Custom Access Request for External Reports](#)

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



To configure a custom Access Request message:

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

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

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

4. Scripted Content Import/Export Utility

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

- For more information, see [Scripted Migration Utility](#)

The image below illustrates how a Category can be exported.

```

;5-1:~$ sudo su
root@stg55-1:/home/users,          # cd /opt/mi/generator
root@stg55-1:/opt/mi/generator# ls
DockerfileTest      intervals      report_data_manager.py
cfg                metric         report_duplicate.py
chart               metric_archive.py report_generator.py
controllers        metric_cleaner.py report_inference_engine.py
dataset             metric_conf    report_validator.py
dataset_generator.py models        require_once
db                 phantomjs   resource
dcr_json_to_csv.py pytest.ini   services
elements.json       regenerate_cv.py tests
garbage_collector.py regenerate_element.py tools
insightdump.py     1             rename_segment.py trim_data_set.py
insightload.py     2             report_cleaner.py trim_json.py
install            report_cv.py  webservice.py
root@stg55-1:/opt/mi/generator# /opt/mi/.python/bin/python insightdump.py -c 243 3
Saved category stg55-1-243
Saved dashboard element [metric] stg55-1-108734
Saved dashboard element [metric] stg55-1-108735
{"dashboard_element": {"108734": {"status": "OK", "children": {"category": [243]}}, "108735": {"status": "OK", "children": {"category": [243]}}, "category": {"243": {"status": "OK"}}, "documents": [], "dataset": {}}

```

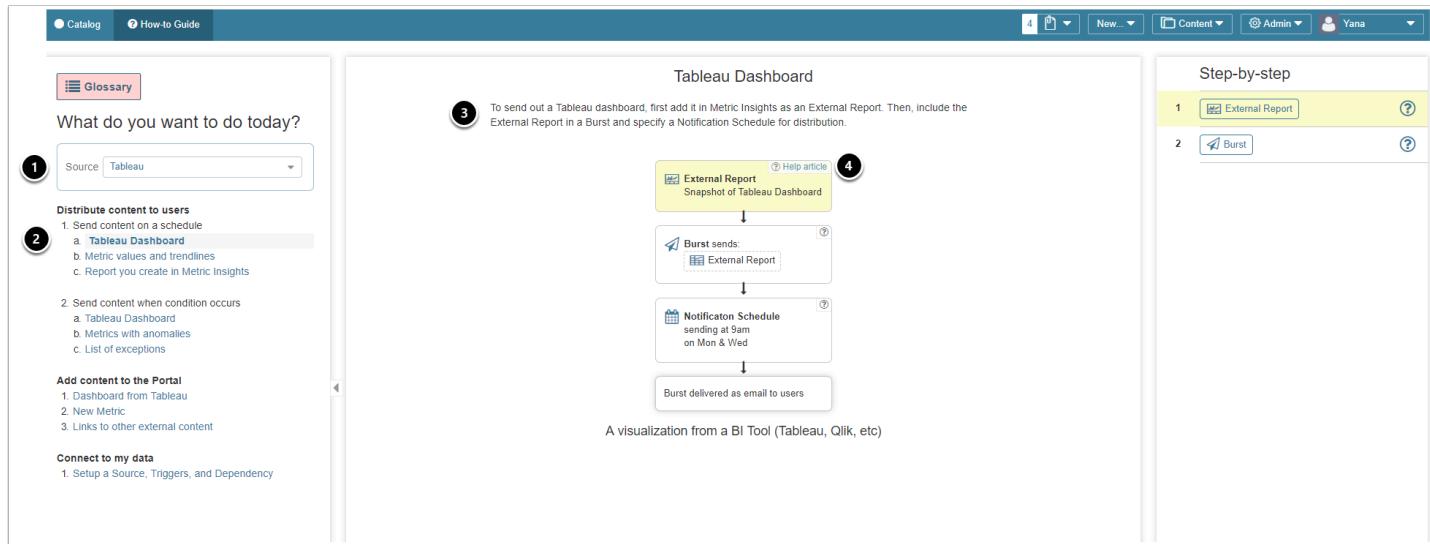
To export a Category:

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

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

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

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



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

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

6. [5.6.1] Bursts: Microsoft Teams distribution

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

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

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

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

The screenshot shows the 'My Notifications / New Burst (25)' interface. At the top, there are buttons for Content, Customize, Subscriptions, Run History, and various save and preview options. Below this, the 'Name' field is set to 'Sales Burst (BY)'. Under 'Content', 'Selected Tiles' are selected. A list of tiles is shown with three items: 'United States | Daily Sales (Qlik Sense)', 'United States | Daily Sales from MS', and 'United States | Daily Sales (Tableau)'. Below this is a 'Schedule' dropdown set to 'Daily M-F (On Mon, Tue, Wed, Thu & Fri at 7:00)'. Under 'Send Burst via', 'Email' is checked and highlighted with a red box. Other options like 'FTP', 'Drive', and 'Slack' are listed below it, and 'Teams' is also checked and highlighted with a red box. The 'Channel' dropdown next to 'Teams' is set to 'stgbot_team - General'.

For Bursting:

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

7. Portal Pages: increased capabilities

- i** New in 5.6.1, Users can set a Portal Page as their Start location. Via My Settings, Users can override previous Portal Page selections configured by Page Creators or Admins.
- See details in [Setting a Portal Page as your Start Location](#)

Portal Page functionality features improvements in terms of:

1. Security
2. Logging

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

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

8. Enhanced Performance for multi-thousand user deployments

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

The rearchitecture will increase system efficiency when performing operations like:

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

9. [5.6.1] Logging Burst-related events

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

The following data is recorded as separate database entries:

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

10. Plugins

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

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

11. Miscellaneous

Dataset Reports

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

Mobile

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

Database/Security

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

Bursting

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

12. Known Issues

Dataset Reports

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

13. Bugs fixed

Categories/Subcategories

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

Documents

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

External Triggers

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

Bursting

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

Dataset Reports

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