



WHAT'S NEW AND RELEASE NOTES

Release: 2020.6

IN THIS RELEASE

NEW FEATURES AND IMPROVEMENTS..... 2

DATA PREPARATION..... 2

- Duplicate datasets 2
- User macros..... 3
- Rename all columns in a data source 6
- Certify data connections..... 6
- Add tags to data connections 8
- Advanced sharing permissions for data connections 9
- Load more data connections into view 11
- Certify AI connections 12
- Add tags to AI connections..... 13
- Advanced sharing permissions for AI connections 14
- Load more AI connections into view 16
- UI enhancements 16

STORYBOARDS..... 18

- Add tags to storyboards 18
- Load more storyboards into view 18

GENERAL..... 20

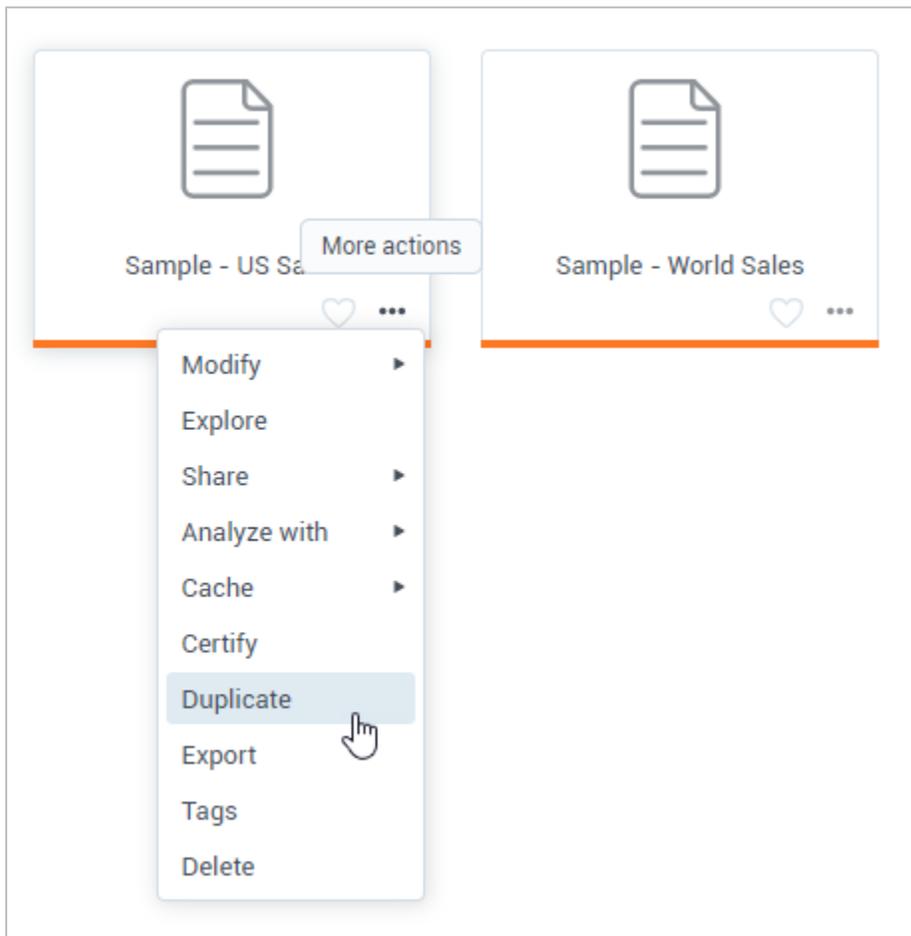
- Cache file-based datasets 20
- Enhanced audit for user activities 20

NEW FEATURES AND IMPROVEMENTS

DATA PREPARATION

Duplicate datasets

Preparing similar datasets becomes faster with the new capability to duplicate datasets. Click the **Duplicate** menu option under **More options** for any of the existing datasets to create its copy. The duplicated dataset has the same structure and properties as the original one except for categorizing details like color, favorite, and tags.



For the shared dataset, the new option appears only if the dataset owner or manager granted the **Duplicate** permission. The new permission is now included in the **Viewer** role in the **Dataset permissions** dialog.

DATASETS PERMISSIONS ?
×

Define permissions for the Copy of Customers Sales datasets.

Groups
Users

+ ADD USERS

Users	Role	View	Duplicate	Share	Edit	Set permission
Raymond Winter...	Viewer ▼	...	✓	✓	✓	✕
George Becker (...)	Manager	✓	✓	✓	✓	✓

APPLY

User macros

This release brings you a range of macros that return various user-related information, which can be useful in filters and calculations.

In the **Calculations** pane, you can now find a new group of built-in calculations called **Macros**. The new group contains a list of macros that return various user-related information:

- **`${user.username}`** – Returns the username.
- **`${user.firstname}`** – Returns the user's first name.
- **`${user.lastname}`** – Returns the user's last name.
- **`${user.email}`** – Returns the user's email.
- **`${user.groups}`** – Returns all the groups where the user is a member.
- **`${user.tenant}`** – Returns the user's tenant.

The screenshot shows the 'CALCULATIONS' interface in DataClarity. On the left is a sidebar with two sections: 'Dimensions' and 'Measures'. The 'Dimensions' section includes 'Location ID', 'Product ID', 'Sales Date', and 'Store Type ID'. The 'Measures' section includes 'Discount', 'Entertainment Cost', 'Gross Sales', 'Items per Transaction', 'Manufacturing Cost', 'Marketing Cost', 'No of Customers', 'No of Transactions', 'Planned Gross Sales', 'Planned Profit', 'Profit', 'Quantity', and 'Sales Cost'. The main area on the right has a 'Calculation name' field, a 'Measure' dropdown, and a 'Type calculation' text area. Below this is a 'SAVE' button. Further down is a 'Search functions' field and a 'Macros' dropdown. A list of macros is shown, including `$(user.username)`, `$(user.firstname)`, `$(user.lastname)`, and `$(user.email)`. A mouse cursor is hovering over `$(user.username)`. Below the list, the macro `$(user.username)` is defined: 'Returns the username for the current user.' An example is provided: `$(user.username) = j.smith`.

User macros in calculations

With a user macro, you can create a calculation to mask the data for some users or reveal profit values only for a specific user.

× Country_1
Dimension ▾

```
case when (INSTR([Manager], ${user.username})>0) then([Country])
else('*****') end
```

UPDATE

To include two macros in a calculation, use single quotes for string values like space characters or other delimiters. For example, to return the first and last name like *John Smith*, add a space as follows: `${user.firstname} + ' ' + ${user.lastname}`

User macros in filters

When you share a dataset, by default, all the data is visible to all its recipients. However, you can filter the data based on a user macro. Restricting access to data in this way is one of the methods of row-level security (RLS). For example, a dataset includes sales data for different regions, where each region has a dedicated manager. When a manager logs into DataClarity, only the relevant data for this manager is shown.

FILTERS ?
×

+ CONDITION
+ GROUP
VIEW SQL

⋮

Manager ▾

equals ▾

\${user.firstname} \${user.lastname}

es	Locations ▾ ×	Products				
Country	State Code	State	Region	City	Manager username	▾ Manager abc
United States	RI	Rhode Island	North America	Providence	george.becker	George Becker

Rename all columns in a data source

Prior to this release, you could add a prefix or suffix when renaming all the column names in a data source. Now, if you navigate to a data source and click **More options** > **Rename** > **Rename all columns**, you will see two more options that you can use when renaming columns:

- **Format** – Convert column names to uppercase, lowercase, or capitalize only the first letter.
- **Replace** – Replace any specified value with another one. For example, you can replace underscore with the space character.

The example at the bottom of the dialog box will reflect all the selections based on the first column name to preview the pattern results that you are applying to all the columns.

RENAME ALL COLUMNS [X]

Add prefix
Source name

Add suffix
Source name

Format
Capitalize first letter

Replace
Old value
Replace with
_

Example: Sales.Sales_Date.Sales

CANCEL OK

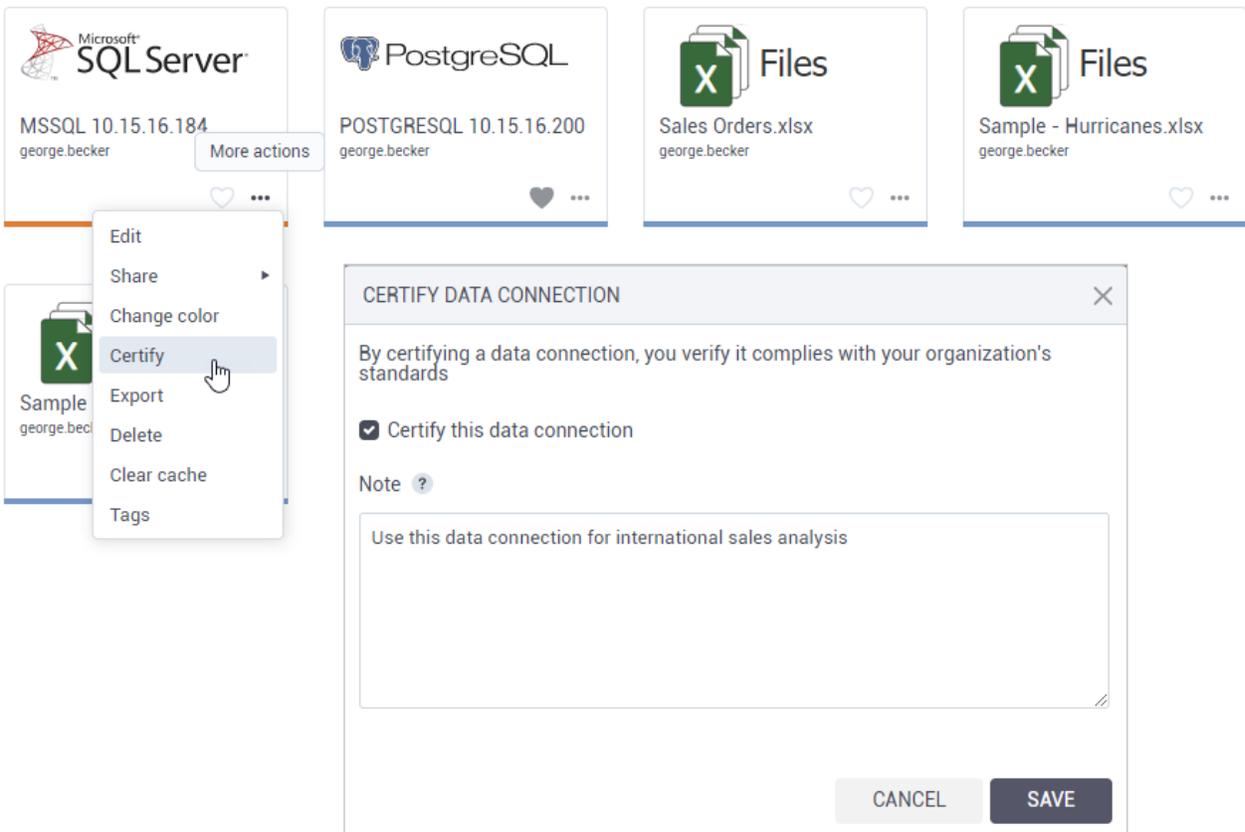
This option is available in the “Step 3 – Join and preview” of the data preparation process.

Certify data connections

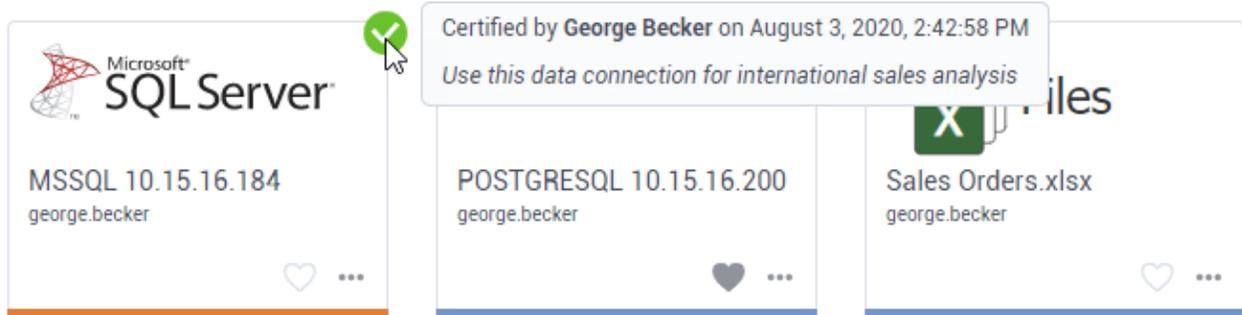
To help dataset modelers find the data connections that are trusted and recommended for their datasets, you can certify data connections. For best search results, only certify the data connections that are valuable and

considered the official source of enterprise information. Data connection's certification ensures the data is reliable and can be used across the organization.

Before performing this task, confirm that users have the dedicated permission to certify data connections, granted in Access Manager. If you can certify data connections, you will find the **Certify** option under the **More actions** menu for the data connection. Users can mark data connection as certified by selecting the **Certify this data connection** check box. Moreover, you can add a note about the certification status with descriptive information on where and how to use it.



Certified data connections appear with a green check mark in the upper-right corner of the connection tile. Hovering over the certification icon will reveal a tooltip with the certification information. The tooltip also shows who certified the connection and the date and time of the certification.



In **List** view, the certification icon appears in the first column for the connection.

	Name	Type	Last updated
	Certified by George Becker on August 3, 2020, 2:42:58 PM <i>Use this data connection for international sales analysis</i>	Microsoft SQL Server	April 30, 2020, 4:29:44 PM
	PostgreSQL 10.15.16.200	PostgreSQL	June 24, 2020, 5:57:38 PM
	Sales Orders.xlsx	File	March 9, 2020, 3:15:58 PM
	Sample - Hurricanes.xlsx	File	July 23, 2020, 1:16:43 PM
	Sample - Hurricanes.xlsx	File	June 2, 2020, 2:46:21 PM

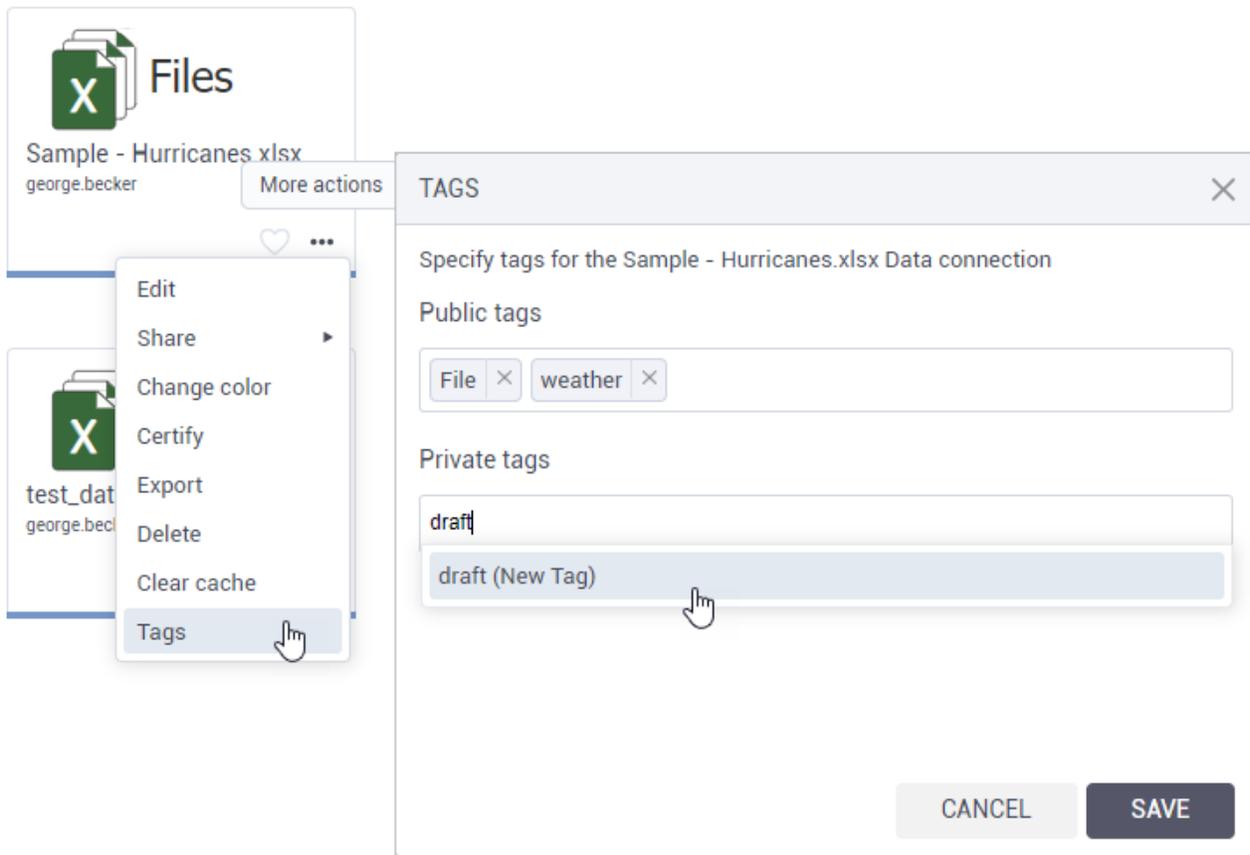
Each new change to the previously certified data connection removes its certification. If multiple users are certifying a connection at the same time, the last saved changes are applied.

Add tags to data connections

Tags are keywords that you can add to data connections to help users better categorize and find connections. Users can now use tags when searching for data connections.

Data connections can include two types of tags:

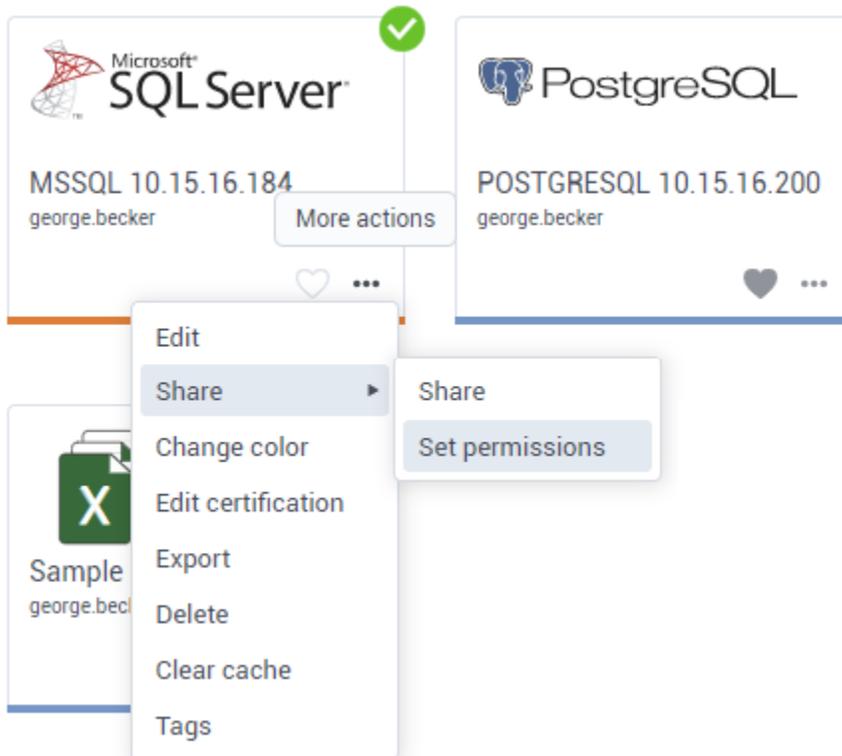
- **Public tags** — Automatically visible within a tenant so that other users may reuse the same tags. For the shared connections, public tags are available to all recipients, in view mode.
- **Private tags** — Visible only for the user who created them.



Advanced sharing permissions for data connections

Previously, users could only share a data connection with no option to set specific permissions for it. Now, a data connection creator or manager can set such permissions as View, Share, Edit, and Set permissions. Additionally, users can quickly share data connections with users and groups with the View permission, and modify the permissions any time later, to accommodate different governance use cases.

These new capabilities allow organizations to enforce governance standards while allowing flexibility and ease of use for agile self-service across teams and user communities.



DATA CONNECTION PERMISSIONS ?

Define permissions for the MSSQL data connection.

Groups Users

Search users to view permissions + ADD USERS

Users	Role	View	Share	Edit	Set permission
Thomas Flemmi...	Viewer	✓	✓	✗	✗
George Becker (...)	Viewer	✓	✓	✓	✓
	Author				
	Manager				
	Custom				
	None				

APPLY

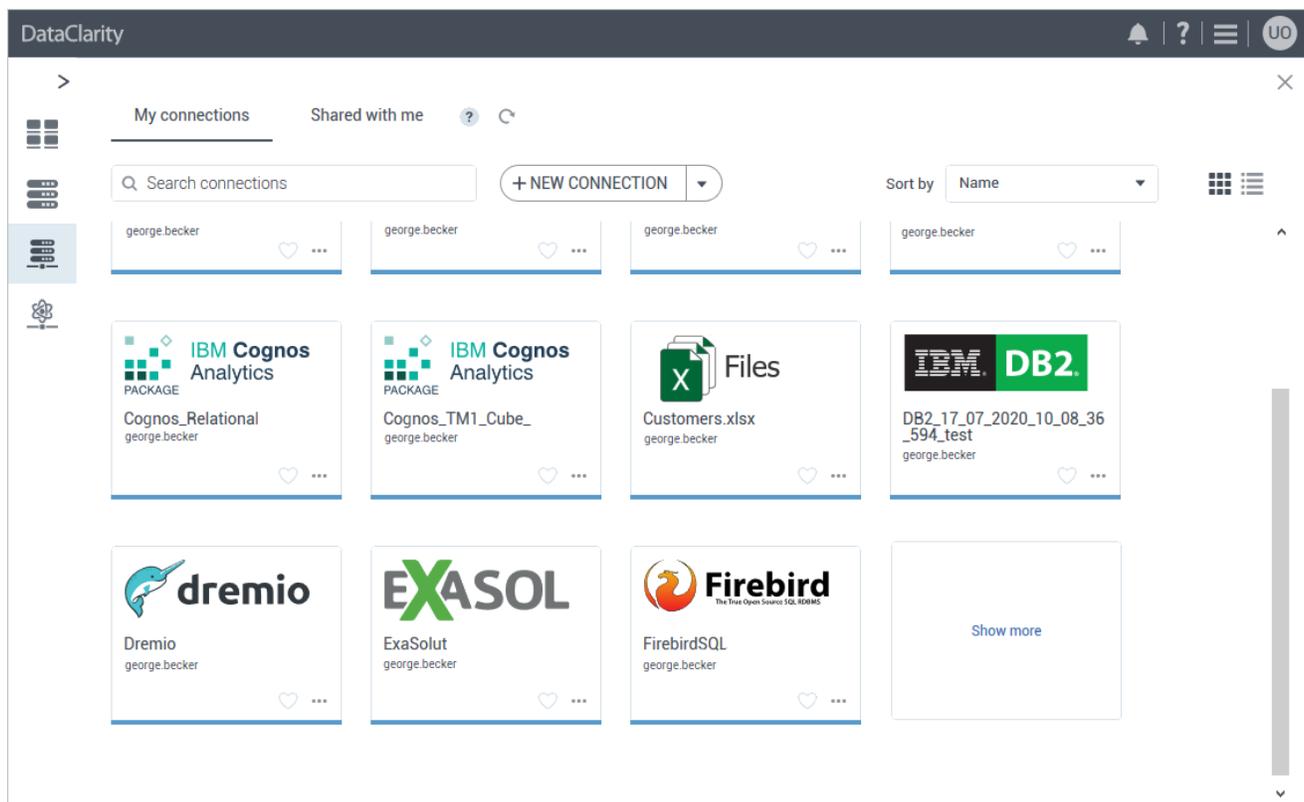
User-level permissions precede group permissions. For increased security purposes, when a user belongs to two or more different groups and the user's specific permissions are not specified, the most restrictive permissions apply.

The permissions set by an administrator will precede those that are granted by a connection manager. To be able to set permissions for a connection, a user needs to have both the right to set permissions (set by the administrator) and the permission granted by the connection manager.

Load more data connections into view

The new pagination technique has improved the performance of Data Preparation. When you open the **Data connections** pane, it loads the first set of 20 data connections. If the number of user's data connections exceeds 20, the new **Show more** link appears at the end of the data connections list. Click this link to load another set of 20 data connections into the view, and so on.

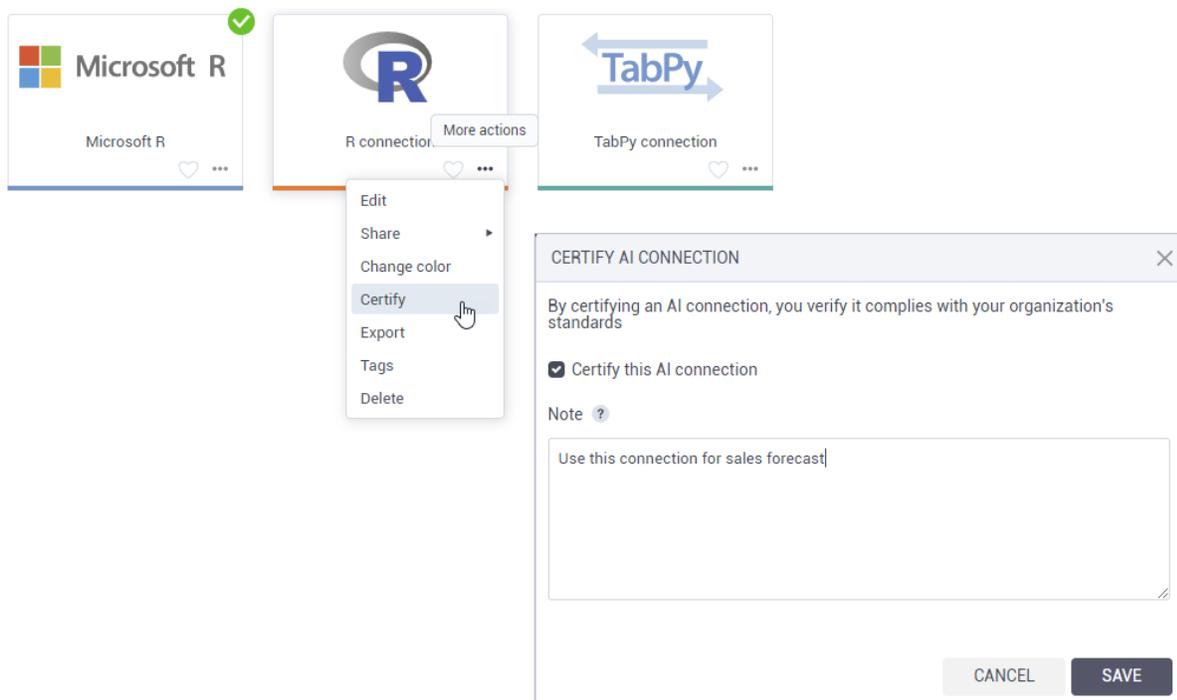
In **Tile** view, the last tile appears with the **Show more** link on it, and in **List** view, right under the last data connection.



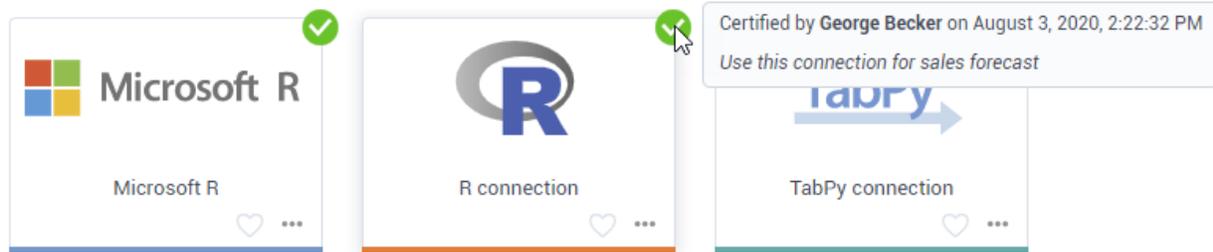
Certify AI connections

To help users find AI connections that are trusted and recommended, you can certify AI connections. For best search results, only certify the AI connections that are suitable for the data science analysis in your organization. Certification ensures the AI connection is reliable and can be used across the organization.

Before performing this task, confirm that users have the dedicated permission to certify AI connections, granted in Access Manager. If you can certify AI connections, you will find the **Certify** option under the **More actions** menu for the AI connection. Users can mark AI connection as certified by selecting the **Certify this AI connection** check box. Moreover, you can add a note about the certification status with descriptive information.



Certified AI connections appear with a green check mark in the upper-right corner of the connection tile. Hovering over the certification icon will reveal a tooltip with the certification information. The tooltip also shows who certified the connection and the date and time of the certification. In **List** view, the certification icon appears in the first column for the connection.



Name	Type	Last updated
Microsoft R 	MRSR	April 9, 2020, 1:38:50 PM
R connection 	RSERVE	April 9, 2020, 1:38:05 PM
TabPy connection 	TABPY	May 29, 2020, 3:20:45 PM

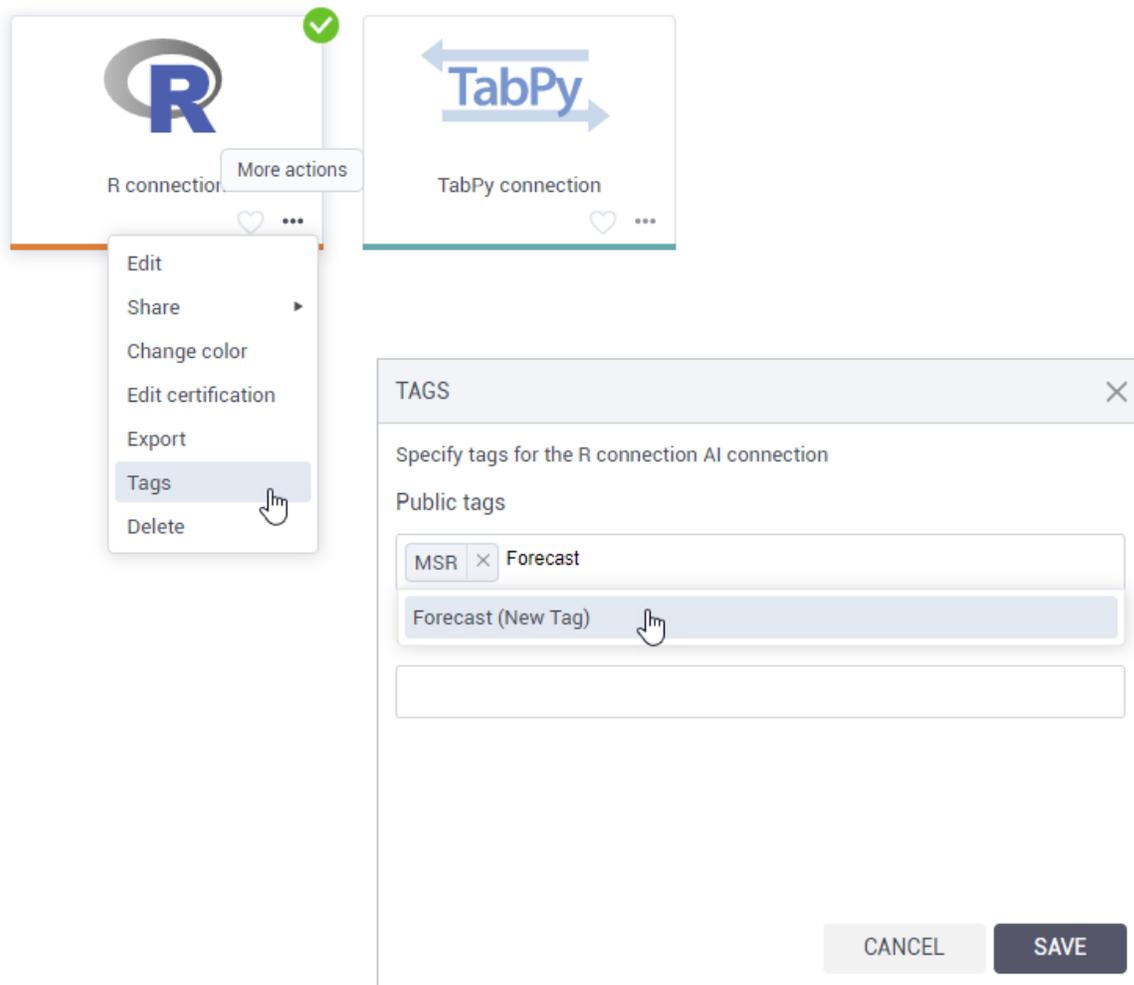
Each new change to the previously certified AI connection removes its certification. If multiple users are certifying a connection at the same time, the last saved changes are applied.

Add tags to AI connections

Tags are keywords that you can add to an AI connection to help users better categorize and find AI connections. Users can now use tags when searching for AI connections.

AI connections can include two types of tags:

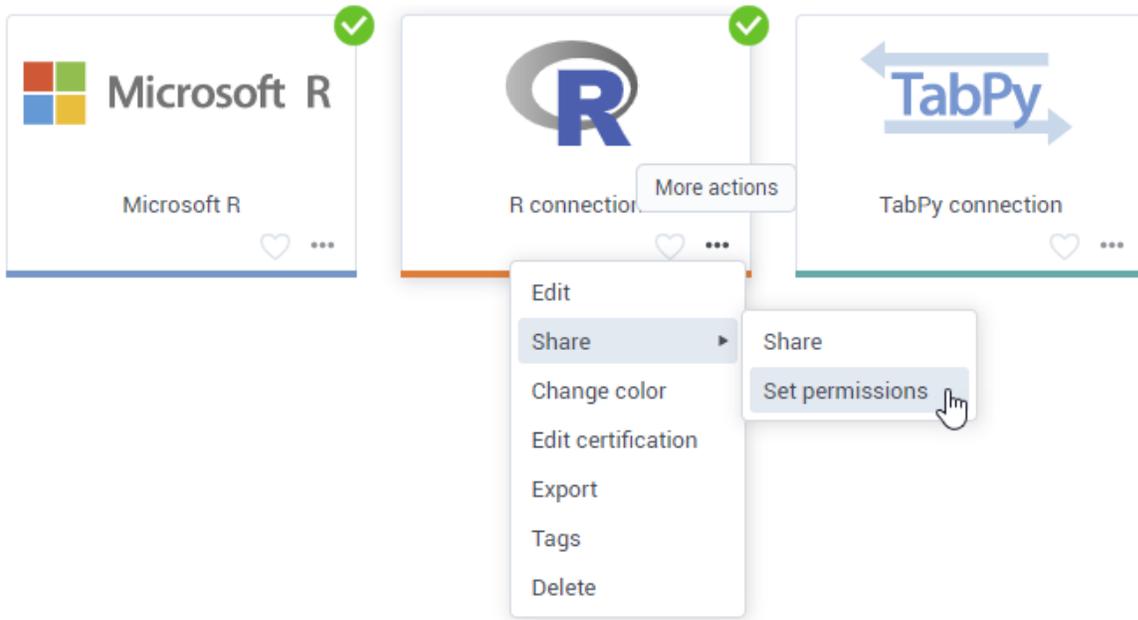
- **Public tags** — Automatically visible within a tenant so that other users may reuse the same tags. For the shared connections, public tags are available to all recipients, in view mode.
- **Private tags** — Visible only for the user who created them.



Advanced sharing permissions for AI connections

Previously, users could only share an AI connection with no option to set specific permissions. Now, a connection creator or manager can set specific permissions for an AI connection such as View, Share, Edit, and Set permissions. Additionally, users can quickly share AI connections with users and groups with the View permission, and modify the permissions any time later, to accommodate different governance use cases.

These new capabilities allow organizations to enforce governance standards while allowing flexibility and ease of use for agile self-service across teams and user communities.



AI CONNECTION PERMISSIONS ?

Define permissions for the Microsoft R AI connection.

Groups Users

Search users to view permissions + ADD USERS

Users	Role		View	Share	Edit	Set permission	
Angie Blake	Viewer	...	✓	✓	✗	✗	
John Flemming	Author	...	✓	✓	✓	✗	
Brian Arniston	None	...	✗	✗	✗	✗	✗
George Becker (...)	Manager		✓	✓	✓	✓	Save

CLOSE

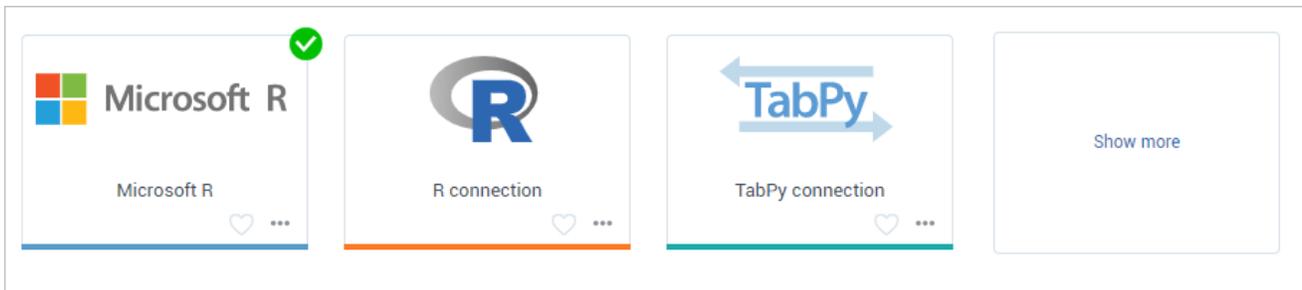
User-level permissions precede group permissions. For increased security purposes, when a user belongs to two or more different groups and the user's specific permissions are not specified, the most restrictive permissions apply.

The permissions set by an administrator will precede those that are granted by a connection manager. To be able to set permissions for a connection, a user needs to have both the right to set permissions (set by the administrator) and the permission granted by the connection manager.

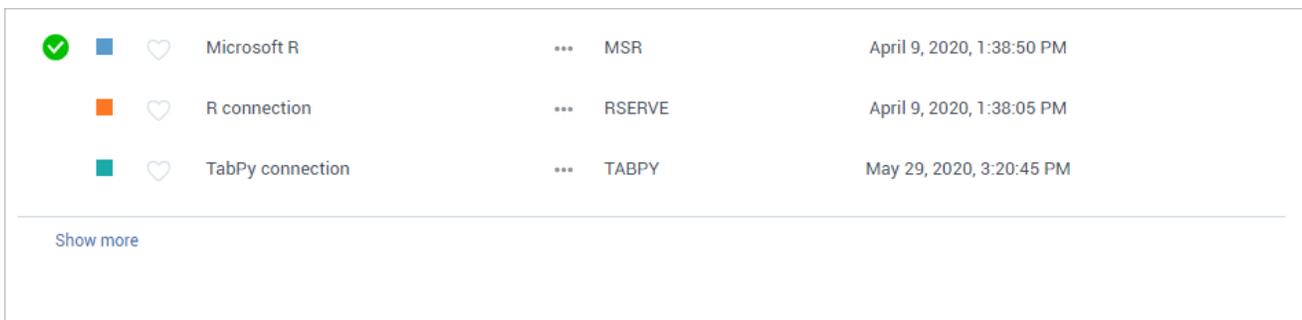
Load more AI connections into view

The new pagination technique has improved the performance of Data Preparation. When you open the **AI connections** pane, it loads only the first set of 20 connections. If the number of user's AI connections exceeds 20, the new **Show more** link appears at the end of the AI connections list. Click this link to load another set of 20 AI connections into the view, and so on.

In **Tile** view, the last tile appears with the **Show more** link on it.



In **List** view, the **Show more** link is placed right under the last AI connection in the list.



UI enhancements

In this release, the following UI enhancements have been added:

- The **Export to > Tableau workbook** menu options have been renamed to **Analyze with > Tableau**.
- The **Import** button in the **Datasets** pane has been moved as a menu option under the **New dataset** button.

- The **Import** button in the **Data connections** pane has been moved as a menu option under the **New data connection** button.
- The **Import** button in the **AI connections** pane has been moved as a menu option under the **New AI connection** button.
- Recipients can now set the categorization color for the data connections and AI connections and mark them as favorites, on the **Shared with me** tab.

STORYBOARDS

Add tags to storyboards

Tags are keywords that you can add to a storyboard to help users better categorize and find storyboards. When searching for storyboards, users can now use tags as search criteria.

Storyboards can include two types of tags:

- **Public tags** — Automatically visible within a tenant so that other users may reuse the same tags. For shared storyboards, public tags are available to all recipients, in view mode.
- **Private tags** — Visible only for the user who created them.

The screenshot illustrates the process of adding tags to a storyboard. On the left, a storyboard titled "KPI review" is shown with a "More actions" menu open. The "Tags" option is highlighted. On the right, a "TAGS" dialog box is displayed, allowing the user to specify tags for the "KPI review" storyboard. The dialog is divided into "Public tags" and "Private tags" sections. The "Public tags" section contains "KPI" and "Profit", while the "Private tags" section contains "draft". "CANCEL" and "SAVE" buttons are at the bottom of the dialog.

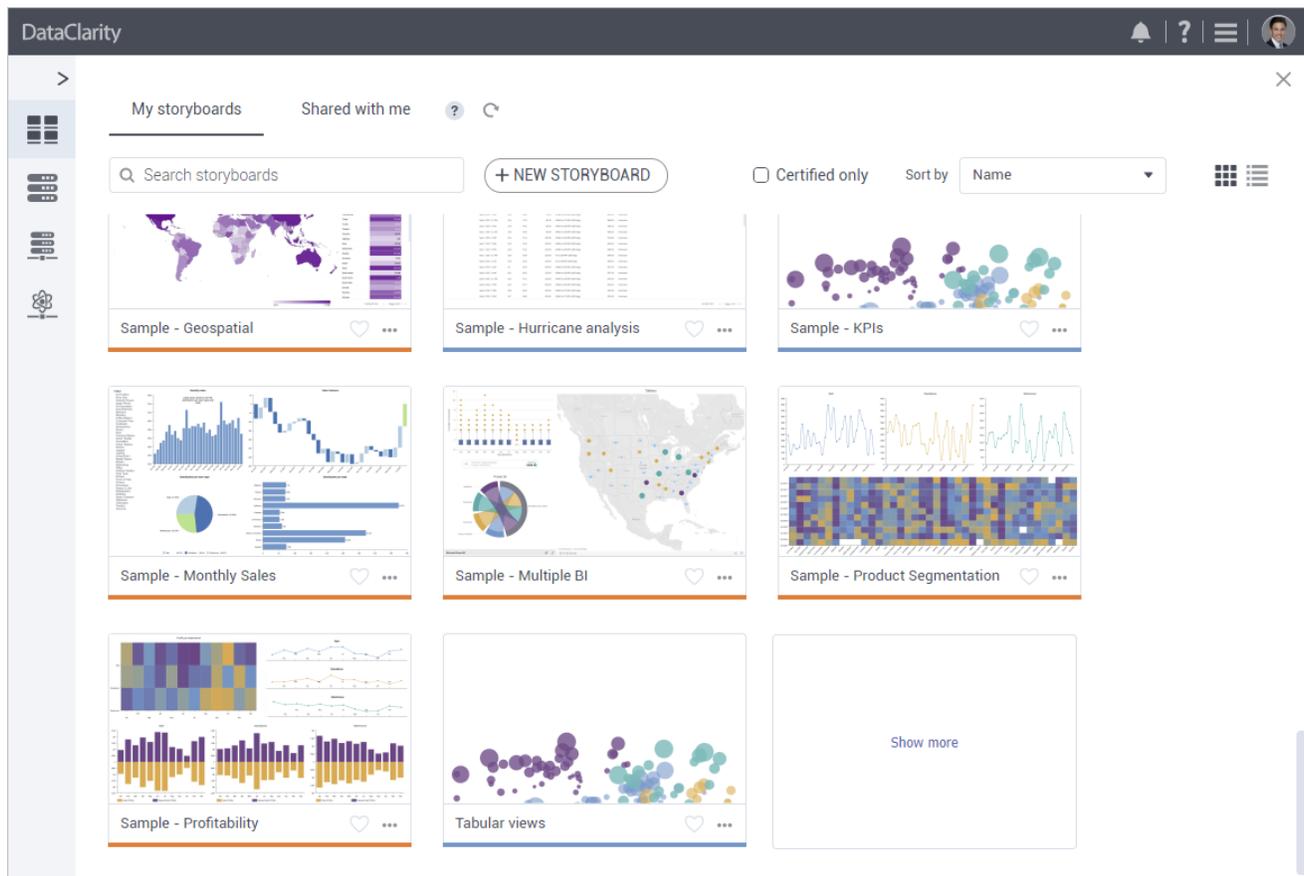
Load more storyboards into view

The new pagination technique has improved the performance of Storyboards. When you open the **Storyboards** pane, it loads only the first set of 20 storyboards. If the number of user's storyboards exceeds 20, the new

Show more link appears at the end of the storyboards list. Click this link to load another set of 20 storyboards into the view, and so on.

To improve the performance of Storyboards, the pagination technique has been introduced to load the first set of 20 storyboards. If the number of the user's storyboards exceeds 20, the new **Show more** link appears at the end of the storyboards list. Click this link to load another set of 20 storyboards into the view, and so on.

In **Tile** view, the last tile appears with the **Show more** link on it.



In **List** view, the **Show more** link is placed right under the last storyboard in the list.

		Sample - Monthly Sales	...	July 23, 2020, 1:16:53 PM	
		Sample - Multiple BI	...	July 23, 2020, 1:16:53 PM	
		Sample - Product Segmentation	...	July 23, 2020, 1:16:53 PM	
		Sample - Profitability	...	July 23, 2020, 1:16:53 PM	
		Tabular views	...	June 17, 2020, 6:01:48 PM	

[Show more](#)

GENERAL

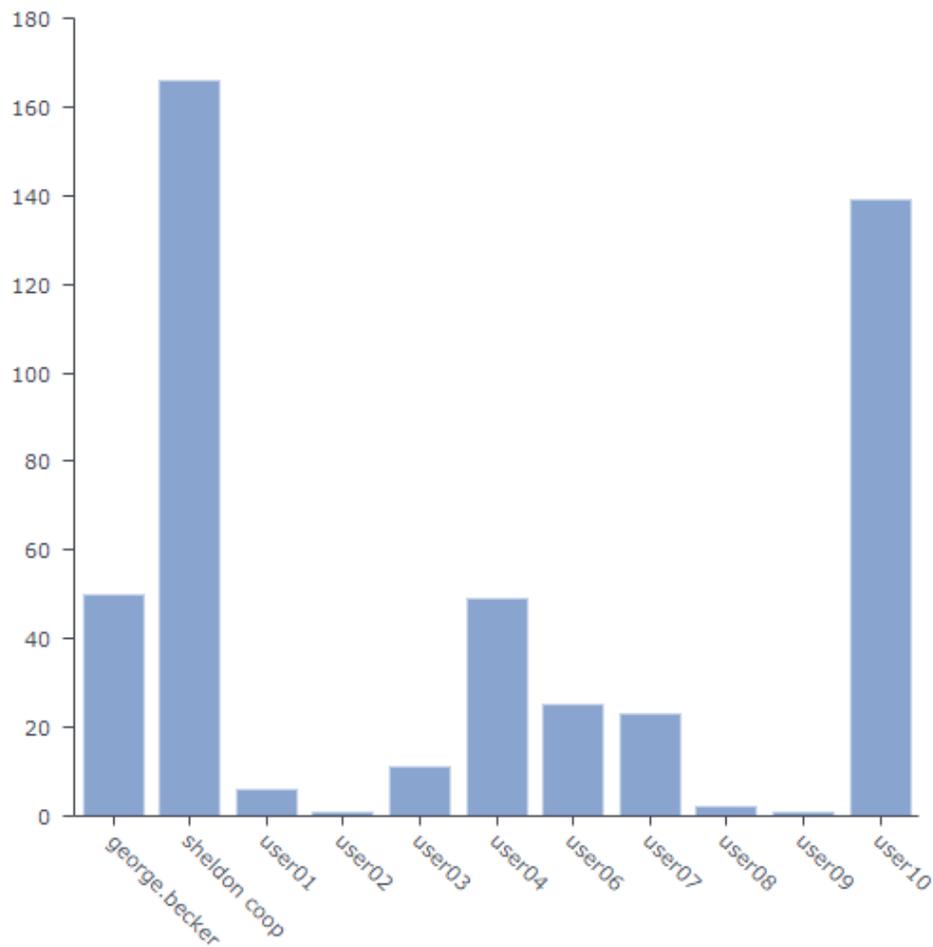
Cache file-based datasets

Now, the cache for the newly created File-only based dataset by default is set to never expire. If the file has been changed, you should clear the cache manually.

Enhanced audit for user activities

In this release, you can connect to the audit database, create the dataset with the necessary data, and then visualize the audit information. For example, you can review various statistics on the dataset like the number of times each user previewed a dataset, the date and time when the dataset was visualized, the most used columns in the datasets, respective tenant information, and so on.

Sales dataset - Previews by user



Administrators can now configure connection details to the database with the audit data. The following configuration settings are now available in the Configuration Manager, under the **Audit** section:

- **Database URL**
- **Database username**
- **Database password**

DataClarity Export | Import Restart 

Q Search

- Configuration
 - Common
 - Audit**
 - Data Preparation
- Data Science
- Data Server
- Notifications
- Portals
- Storyboards
- User Access
- Web Connectors

Audit

Collecting audit events ?

Database URL ?

Database username ?

Database password ?

SAVE **RESET**