Strategy

Strategy One Readme

Strategy One

Strategy One

February 2026

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CONTENTS

Release Dates ... *1*

What's New in Strategy One ... *5*

Platform Certifications ... *270*

Resolved Defects and Enhancements ... *271*

System Requirements ... *273*

Compatibility and Interoperability ... *300*

Installing and Upgrading ... *309*

Product Development Methodology ... *312*

Strategy Security Assurance Program ... *319*

Unsupported Tools and Capabilities ... *322*

Strategy Intelligence Server ... *333*

Installing Strategy Intelligence Server ... *335*

Upgrading Strategy Intelligence Server ... *336*

Uninstalling Strategy Intelligence Server ... *338*

Resolved Issues ... *338*

Troubleshooting ... *338*

Clients ... *339*

Strategy Web ... *340*

Strategy Workstation ... *344*

Strategy HyperIntelligence ... *346*

Strategy Library ... *349*

MicroStrategy Identity ... *352*

Strategy Mobile ... *354*

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Strategy for Office ... 358
MicroStrategy Developer ... 361

Tools ... **364**

MicroStrategy Command Manager ... 365
MicroStrategy Enterprise Manager ... 370
Strategy Platform Analytics ... 374
MicroStrategy System Manager ... 376
MicroStrategy Integrity Manager ... 379
MicroStrategy Object Manager ... 384
MicroStrategy Analytics Modules ... 392
MicroStrategy Narrowcast Server ... 397

Strategy SDK ... **403**

Compatibility and Interoperability ... 405
Installing Strategy SDK ... 405
Upgrading Strategy SDK ... 405

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Release Dates

Strategy One (February 2026)

Strategy One (January 2026)

Strategy One (December 2025)

Strategy One (November 2025)

Strategy One (October 2025)

Strategy One (September 2025)

Strategy One (August 2025)

Strategy One (July 2025)

Strategy One (June 2025)

Strategy One (May 2025)

Strategy One (April 2025)

Strategy One (March 2025)

Strategy One (February 2025)

MicroStrategy ONE (December 2024)

MicroStrategy ONE (October 2024)

MicroStrategy ONE (September 2024)

MicroStrategy ONE (June 2024)

MicroStrategy ONE (March 2024)

MicroStrategy ONE (February 2024)

MicroStrategy ONE (January 2024)

MicroStrategy ONE - Update 12, December 2023

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MicroStrategy ONE - Update 11, November 2023

MicroStrategy ONE - Update 11 Patch 1, October 2023

MicroStrategy ONE - Update 11, September 2023

MicroStrategy ONE - Update 10, August 2023

MicroStrategy ONE - Update 10, July 2023

MicroStrategy ONE - Update 10, June 2023

Update 9, May 2023

Update 9, April 2023

Update 9, March 2023

Update 8, February 2023

Update 8, January 2023

Update 8, December 2022

Update 7, November 2022

Update 7, October 2022

Update 7, September 2022

Update 6, August 2022

Update 6, July 2022

Update 6, June 2022

Update 5.2, May 2022

Update 5.1, April 2022

Update 5, March 2022

Update 4.1, February 2022

Update 4.1, January 2022

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Update 4, December 2021

Update 3, November 2021

Update 3, October 2021

Update 3, September 2021

Update 2, August 2021

Update 2, July 2021

Update 2, June 2021

Update 1, May 2021

Update 1, April 2021

Update 1, March 2021

Platform Release, February 2021

Platform Release, December 2020

For additional information, see the following sources:

- Contact Technical Support
- Product Documentation

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To access the Readme in your preferred language, select the link below.

English



Español



Italiano



中文(简体)



Français



Deutsch



日本語



한국어



Português



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What's New in Strategy One

Strategy One introduces new features that provide better performance and scalability to enhance the overall user experience. In addition, this release introduces new features across the analytics, mobility, and security platforms—making it easier for users to build applications faster.

Below are the new features exclusive to Strategy One and its subsequent updates. For a smooth upgrade, be sure to review the important version-specific information regarding changes in the release that could impact functionality and performance. For customers with an upgrade gap of more than one version, the Readme for all intermediate versions can be found in Product Documentation.

Preview features are early versions of features and are not to be used in a production environment as the core behavior remain subject to change between preview and GA. By selecting to expose preview features in Strategy Workstation, you can access these features and use them as you would any other dashboard functionality. The official versions of preview features are included in subsequent releases. Any preview features on this page are marked with *Preview Feature*.

You must perform a metadata update when upgrading from a pre-2021 release to Strategy One or Strategy 2021.

Features and releases that are only supported in Strategy Cloud environments are marked with a cloud icon.

Strategy One (February 2026)

Strategy Mosaic

Mosaic Studio

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Connect to Google BigQuery using service account authentication and vault connections.

Strategy AI

Agents

- Use Mosaic model links in an agent. See Create an Agent from a Data Model.
- Implement BYOE for Gemini 2.5.
- *Preview feature*: Access Mosaic models in the MCP server. This allows you to ask questions in MCP directly against the unified semantic layer, without needing to go through an agent. See Interact with Agents Using an MCP Server.
- *Preview feature*: Replace LLAMA LLM with a mixed model using GPT-OSS and Gemma-27b as the go-to open source model of choice.

Auto Dashboards

- Implement BYOE for Gemini 2.5.
- *Preview feature*: Replace LLAMA LLM with a mixed model using GPT-OSS and Gemma-27b as the go-to open source model of choice.

Strategy Library

Administration

- Use a subscription level setting to send an email notification to the owner and recipient if a delivery for an email subscription fails.
- Search and set multiple schedules for one subscription.

Dashboards

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- Use the table of contents display settings to define the display format.
- Allow users to maximize visualizations on a panel to the size of the dashboard. Previously, the maximized view covered the panel only. For steps to define this property, see Dashboard Properties Dialog.
- When you filter on a chapter filter containing dates, you can create a filter for before, on, or after a specific date. You can also choose quick dynamic date options such as last seven days, today, and month to date. For steps, see Filter A Dashboard and Filter a Chapter by Creating a Quick Dynamic Date.
- Define contextual links on objects in visualizations and in the dashboard's datasets. Instead of displaying the link on the entire visualization, these object links allow you to control where a contextual link is available. For steps and examples, see Use a Visualization to Filter Data in a Different Dashboard.
- Improved modern grid performance.

Reports

- Create a report based on an intelligent cube.
- Improved modern grid performance.

Strategy Workstation

Administration

- Support for key-based SFTP authentication in FTP subscriptions.
- A new migration setting to use the last modified timestamp for a migrated object's details rather than the migration time.
- Synchronize system prompts using SCIM 2.0 protocol.

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- Added Microsoft PowerPoint, Microsoft Excel, Tableau, Google Sheets, Hyper, and Mosaic application types to Job Prioritization.
- Add and remove contacts in the Deliveries page when editing and creating users.
- Create prompted incremental refresh reports.
- Use a subscription level setting to send an email notification to the owner and recipient if a delivery for an email subscription fails.
- Create an MDX intelligent cube in Workstation. This allows you to build intelligent cubes by querying OLAP data sources like Microsoft Analysis Services (SSAS) or SAP BW using MDX.
- View database connection details.
- Added support for two additional wildcards in SQL Hint.
- Enhanced Microsoft Analysis Services (MSAS) security is enabled out-of-the-box.

Dashboards

- Use the table of contents display settings to define the display format.
- Allow users to maximize visualizations on a panel to the size of the dashboard. Previously, the maximized view covered the panel only. For steps to define this property, see Dashboard Properties Dialog.
- When you filter on a chapter filter containing dates, you can create a filter for before, on, or after a specific date. You can also choose quick dynamic date options such as last seven days, today, and month to date. For steps, see Filter Panel and Filter a Chapter by Creating a Quick Dynamic Date.
- Define contextual links on objects in visualizations and in the dashboard's datasets. Instead of displaying the link on the entire visualization, these object links allow you to control where a contextual link is available. For

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steps and examples, see Use a Visualization to Filter Data in a Different Dashboard.

- Improved modern grid performance.

Reports

Improved modern grid performance.

Strategy Managed Cloud Enterprise

Added support for cloud native backup and restore for Amazon Web Services.

Strategy for Google Sheets™

Group imported objects to easily perform bulk actions.

Strategy Library Mobile SDK

Android

Use an existing system browser during OIDC authentication.

Strategy Packages for Python (mstrio-py)

New features

- Created new `script` module inside also new `mstrio.python_execution` subfolder exposing `Script` and `Code` classes, as well as some script Variable-based helper dataclasses and `list_scripts` method
- `Script` class represents Strategy Python Script metadata objects run on server-side execution Python engine

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- `Code` class is a helper class which allows to run Python code on server-side execution Python engine without the need to create a `Script` metadata object
- All Variable-based dataclasses are helper classes to handle Variables easily in `Script` or `Code` classes

Minor changes

Added argument `strict` to `Project.is_loaded()` method.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Connect to Google BigQuery using service account authentication and vault connections.
- Certify Entra ID authentication for Microsoft SQL Server.

Strategy One (January 2026)

Mosaic

Mosaic Studio

- Use the AI assistant in the Python Query data source to create python queries to import data.
- Mosaic model linking is available out-of-the-box.

  Create and view linked attributes across models to establish relationships between disparate Mosaic models and enrich analytical content using the following methods:

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- Import existing Mosaic models.
- Model link suggestions.
- View Mosaic model links.

Universal Semantic Layer

- Connect your ArcGis visualizations to Power BI DAX.

Strategy AI

Agents

- Key driver improvements include:
  - A deep workflow optimization automatically filters for clean and information-rich dimensions, ensuring faster and statistically significant results.
  - All agents, including those with Mosaic models as datasets, use the same unified key driver workflow logic.
  - The visual representation of deep research reports has been polished to make them more concise and prioritize key insights. Reports exported to PDF include a table of contents with functional navigation.
- Connect to an MCP server in AWS/Amazon Quick Suite, ChatGPT, Copilot Studio, or Gemini to interact with agents from multiple clients in a ChatGPT-like interface. For steps to connect and use the MCP server, see Interact with Agents Using an MCP Server.
- Improvements to voice command interactions include:
  - Remembering whether the voice command is enabled when you close and reopen the agent
  - Immersive mode, which does not display answers onscreen as subtitles

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  - Settings to choose the voice, the output device, and the input device
  - Implementation on mobile devices
  - Refined interface and animations that deliver a more visually engaging and intuitive experience

- Use the SQL template to create custom instructions to pick columns when specified conditions are met. Rules can be based on attributes only, adding to the previous scenarios of metrics only and attribute and metric combined.
- User questions and answers are cached for each agent, and you can manage these caches.

Auto Dashboards

- Create a page or chapter that uses free form layout, which independently positions, sizes, and layers containers on a page. For steps, see Create a Page of Visualizations and Create a Chapter.
- Auto Dashboard supports regular dashboard improvements such as:
  - Iconic KPI visualization, including hiding the image
  - Page level image background
  - Color palette at the visualization level for box plot, Sankey, histogram, and time series visualizations
  - Changing the page background
- You can display the Auto Dashboard panel as a floating window that you can drag and resize. This leaves more space for the dashboard canvas so you have a better view of the entire dashboard. You can quickly minimize the floating panel to save even more screen space and then maximize it when needed.

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Strategy Library

Dashboards

- Updated the Geospatial Service visualization to support Mapbox GL v3.16.0, clusters at the same location and address issues with cluster radius and zoom behavior. You can now set the cluster radius to 0 and only the same data points will be clustered.
- Create FTP subscriptions in Library.
- Icons in the Iconic KPI visualization can be hidden.
- The color palette of Iconic KPI and Donut Chart visualizations can be defined at the individual visualization level.
- For line charts, area charts, or combo charts, the smoothness of the curve can be adjusted.
- Use the Page Size option to choose a screen resolution.
- The zoom level drop-down list is available out-of-the-box.
- Define default consumption view for users in the Lock Page Size setting.

Reports

- When you search for an object while creating a filter in a report, suggested objects display their folder paths. This ensures you can easily select the correct object when multiple objects have the same name.
- Create FTP subscriptions in Library.

Strategy Workstation

Dashboards

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- Updated the Geospatial Service visualization to support Mapbox GL v3.16.0, clusters at the same location and address issues with cluster radius and zoom behavior. You can now set the cluster radius to 0 and only the same data points will be clustered.
- Icons in the Iconic KPI visualization can be hidden.
- The color palette of Iconic KPI and Donut Chart visualizations can be defined at the individual visualization level.
- For line charts, area charts, or combo charts, the smoothness of the curve can be adjusted.
- Use the Page Size option to choose a screen resolution.
- The zoom level drop-down list is available out-of-the-box.
- Define default consumption view for users in the Lock Page Size setting.

Reports

- When you search for an object while creating a filter in a report, suggested objects display their folder paths. This ensures you can easily select the correct object when multiple objects have the same name.
- Drag objects from the Workstation window into your Report editor to quickly build and modify reports.

Documents

Add a Mosaic model as your document dataset.

Administration

- Create a metric from a fact with one click. Right-click a fact in the Objects or Projects section, point to **New**, and select **Metric** to display the Metric Editor. The metric formula automatically sums a numeric fact and uses the maximum function for a non-numeric fact. Adjust the formula as needed

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and save the new metric.

- Bulk add cubes, reports, documents, and dashboards to the history list.
- You can add and remove filters directly within hierarchies. In the Hierarchy Editor, right-click an attribute and select **Define Attribute Filters**.
- The Catalog Option Editor has new options. You can enable or disable:
  - Ignore the current table name space when reading from the database catalog and update using the new table name space.
  - Automatically define prefixes for all the tables that are added to the project.
  - Automatic mapping. Schema objects can be mapped to the new tables automatically.
- Save As, Save and Close, and Save and New options are available in the attribute editor and fact editor.
- Define TLS connections to FTP on delivery devices for subscriptions.
- Enable the project-level setting, **Require Expiration Date**, to require users to set an expiration date when creating subscriptions and define a **Maximum Subscription Duration** in days. Enable this setting to ensure subscriptions do not run indefinitely, managing resource and operation costs.
- Added search settings to the Migrations monitor page.
- Support for user language propagation through SCIM 2.0 and OIDC claims, automatically setting a user's language at login based on values passed from third-party IdPs.
- Added advanced object properties and new information to exported documentation (including folders in object categories), optimized performance for large environments, enhanced API statuses for clearer

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background process tracking, and introduced UI refinements such as required-field indicators, storage configuration guidance, and additional status/size cues.

- Integrate Library SCIM 2.0 with PingFederate provisioning.
- Compare reports using the test center.
- Import data from Microsoft Analysis Services.

Strategy Managed Cloud Enterprise

- Added support for certificate authority on NEE pods.
- Added support for cloud native backup and restore for Google Cloud Platform.
- Added support for client-side rate limiting and additional support for on-premises vaults in the Data Gateway server.

Strategy for Office

Excel

Enable automatic log in to the Excel add-in.

Strategy Packages for Python (mstrio-py)

New features

- Added support for Custom Groups.
  - Added class `CustomGroup` and function `list_custom_groups` in new module `modeling.custom_group`.
  - Added support for `Reports` containing `Custom Groups`.

Minor changes

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- Added the following quality-of-life improvements to `Project` module methods:
  - Added force flag to `Project.delete()` method to allow deleting project without prompt for confirmation.
  - Added `unload_beforehand` and `delete_immediately` flags to `Project.delete()` method to simplify work with project deletion.
  - Added `async_request` flag to `Environment.create_project` method to allow requesting project creation asynchronously, without the need to wait for its completion.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability, support new functionality, and fix functionality and performance issues for the following drivers:

  - Arrow Flight JDBC driver
  - Google BigQuery ODBC
  - Hive ODBC and JDBC drivers
  - Impala ODBC driver
  - MongoDB ODBC and JDBC drivers
  - Oracle ODBC and JDBC drivers
  - PostgreSQL Native Windows ODBC and JDBC drivers
  - SparkSQL JDBC driver
  - SQL Server Native JDBC driver

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- Certify and support for StarRocks database.
- Support for Workload Identity Federation to connect to Google BigQuery with a JDBC driver.
- Import Data from Microsoft Analysis Services.

Strategy One (December 2025)

The December 2025 release includes the following updates in addition to the previously released cloud October 2025 and November 2025 updates for on-premises customers.

End of Support

The following Strategy products and platforms will no longer be supported starting December 2026:

- **Strategy On-Premises Platform (MEP)**: Mainstream support for MEP will end December 31st, 2026. After this date, only Extended Lifecycle Support will be available. All support for MEP will end after December 31, 2028.
- **Legacy Tools**: Mainstream support for Developer, Command Manager, and Object Manager will end December 2026. As part of this transition, the following updates will be made:
  - **Developer**: As of the Strategy One (December 2025) release, Workstation reaches full core administrative, schema, project-level, and object-management parity. Extended functionality will be released through March 2026.
  - **Command Manager**: Full parity is expected via Python scripts in Workstation (mstrio-py) by March 2026.

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    - **Object Manager**: Migration and object-promotion workflows are part of the existing Workstation Migrations module, full parity is expected by June 2026.

- **Narrowcast Server Deprecation in June 2026**: The Strategy One (December 2025) release will be the final version to include Narrowcast Server (NCS) installation, marking the official retirement of NCS. Support for NCS will end in June 2026. With feature parity gaps addressed in Distribution Services as of the September 2025 release, customers are encouraged to begin transitioning to Distribution Services ahead of the end-of-support date.

Mosaic

Mosaic Studio

- *Preview Feature*: Create and view linked attributes across models to establish relationships between disparate Mosaic models and enrich analytical content using the following methods:
    - Import existing Mosaic models.
    - Model link suggestions.
    - View Mosaic model links.
- Manage Mosaic models in the Sources pane.
- The Gemini-2.5-flash model is supported for Mosaic. Strategy AI works with the offline LLM models.
- Use time attributes to create time transformation metrics.

Mosaic Sentinel

This release introduces Mosaic Sentinel, a unified data governance intelligence platform that provides enterprises real-time risk alerts, comprehensive audit visibility, and clear usage insights across their semantic layer without data movement or vendor lock-in. This release

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introduces three core modules: Risk Management, Audit & Compliance, and Usage Insights. These modules provide end-to-end visibility into sensitive operations, model changes, and overall ecosystem activity.

Universal Semantic Layer

- The following updates were made to the Power BI connector:
  - Data format: When you update the data format while editing a Mosaic model and refresh your data in Power BI, the new data format displays.
  - Hidden forms: When you hide or display a form while editing a Mosaic model and refresh your data in Power BI, the form displays in your data.
  - Language: When you define your language in your Strategy environment and refresh your data in Power BI, the default data format updates to match the locale.

Strategy AI

Agents

- Add unstructured data files as data sources and then manage them using Library. For steps, see Add Unstructured Data in Library.
- The Key Driver Analysis (KDA) has been improved by incorporating statistical methods to select columns. This includes pooling sufficient sample points to accurately reflect population trends and applying Maximum Relevancy and Minimum Redundancy (MRMR) to identify the columns for analysis. A sufficient number of statistical graphs is also generated for each feature to accurately assess and analyze the relationship of the features with the target metric. This also helps with detecting outliers.
- Enable the SQL template to allow for custom instructions for specific calculations or questions. This improves on the current approach of using Customer Instruction and column description, because it is easier to use.

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- Connect to an MCP server in Claude or Copilot to interact with agents from multiple clients in a ChatGPT-like interface. The MCP server in Strategy Library exposes tools that allows MCP client applications to discover, interact with, and query agents directly. For steps to connect and use the MCP server, see Interact with Agents Using an MCP Server.
    - If you are working with a container-based environment, enable the MCP server before connecting MCP clients to it for interaction with agents.
- Select AI-enabled data models as datasets for agents. A data model is a graphical representation of the flow and structure of data. Use Mosaic Studio to expedite your data modeling. The agent interprets the questions, detects the relevant data model, and responds with answers based on the metrics and relationships defined in that model. Using a data model enhances flexibility and depth in the agent's answers. For steps, see Create an Agent from a Data Model.
    - This October preview feature is now available out of the box.
- Enable the voice agent to use voice commands to interact with an agent. The agent displays the answers onscreen and reads them aloud.
- The Gemini-2.5-flash and Gemini-embedding-001 models are supported for agents. Strategy AI works with the offline LLM models.

Auto Dashboards

- Create and format rich text boxes.
- Select the page style that Auto Dashboard generates.
- When you create a dashboard page from an image, the colors are extracted from the image to create custom palettes for the dashboard.
- LLAMA 3.3 70B is now supported for auto dashboards, including auto narratives and auto answers. Strategy AI works with the offline LLM models.

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- The Gemini-2.5-flash model is supported for auto dashboards, including auto narratives and auto answers. Strategy AI works with the offline LLM models.

Strategy Library

Dashboards

- Create a modern donut chart visualization to view the contribution of attribute elements to a total. A donut chart is a circular chart with a hole in the middle, like a donut, that displays KPI information. The rounded corners, smart legend positioning, and interactivity expand your visualization options. For examples and steps to create and interact with donut charts, see Create a Donut Chart.
- Create and display custom subtotals for modern grids. A custom subtotal provides additional flexibility and control because you can use different subtotal functions for different metrics on the same display line. For steps and an example, see Define Custom Subtotals in Modern Grids.
- Choose the attribute level at which the metric total is calculated in modern grids. Each total function can calculate at a different level, providing more flexibility and control. For steps and an example, see Select the Level for Subtotal Calculation in Modern Grids.
- The Dashboard Properties dialog box contains a new tab, Consumption View, to make it easier to manage these related options. Pin/dock the Filter panel and the Contents panel when the dashboard is viewed in Library and in Presentation Mode in Workstation. This more granular control can help remind users that dashboards can have multiple pages and can be filtered. To update the settings, which overwrite the application-level settings, see Dashboard Properties Dialog.
- Updated visualization formatting:

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    - Default formatting settings for font and graph size in graph matrix visualizations have been adjusted to improve its look and feel. The default legend position is now bottom right, and you can change the legend position and alignment. Define a custom color palette for a graph matrix; changes to the dashboard palette do not affect the custom-colored graph matrix.
    - Line charts support the curved line style.
    - Bar shading is available for simple bar charts.
- Filter formatting has been improved with the addition of rounded corners, opacity, shadows, and padding for containers, and gradients for containers and text boxers. The improvements allow you to better define and customize filters with greater flexibility.
- The preview feature Enable parallel visualization rendering has been improved and replaced by Incremental Dashboard Rendering. When enabled, the dashboard incrementally renders during the initial execution. You can switch between pages and chapters before the initial full dashboard load is complete by enabling the Page-Switching preview feature. For details on these processes, see Incremental Dashboard Rendering.
- When you edit a dashboard with a locked page size, the canvas displays in its actual size which may be bigger than the available display area, making it difficult to view and design the full dashboard. To alleviate this, enable a preview feature to display a zoom level drop-down list when you are editing dashboards. Use the drop-down list to scale the canvas to a specific percentage, fit the canvas to the available display area, or fill the available display area with the canvas.
- Add a background image or adjust the background fill of a page.

Reports

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- Apply a theme (a predefined grid format) to update multiple formatting settings at once. For steps, see Create Reports in Library Web.
- Create an MDX cube report using an imported MDX cube as the data source. For steps, see Create an MDX Cube Report in Strategy Workstation and Library.
- Create a new intelligent cube report based on an existing intelligent cube and re-point grid reports to a different cube. For steps, see Repoint a Grid Report to a Different Cube (OLAP Cube) in Strategy Workstation and Library.

Administration

Improved the plaintext tomcat-users.xml file security by encrypting credentials.

Strategy Workstation

Dashboards

- Create a modern donut chart visualization to view the contribution of attribute elements to a total. A donut chart is a circular chart with a hole in the middle, like a donut, that displays KPI information. The rounded corners, smart legend positioning, and interactivity expand your visualization options. For examples and steps to create and interact with donut charts, see Create a Donut Chart.
- Create and display custom subtotals for modern grids. A custom subtotal provides additional flexibility and control because you can use different subtotal functions for different metrics on the same display line. For steps and an example, see Define Custom Subtotals in Modern Grids.
- Choose the attribute level at which the metric total is calculated in modern grids. Each total function can calculate at a different level, providing more flexibility and control. For steps and an example, see Select the Level for

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Subtotal Calculation in Modern Grids.

- The Dashboard Properties dialog box contains a new tab, Consumption View, to make it easier to manage these related options. Pin/dock the Filter panel and the Contents panel when the dashboard is viewed in Library and in Presentation Mode in Workstation. This more granular control can help remind users that dashboards can have multiple pages and can be filtered. To update the settings, which overwrite the application-level settings, see Dashboard Properties Dialog.
- Updated visualization formatting:
  - Default formatting settings for font and graph size in graph matrix visualizations have been adjusted to improve its look and feel. The default legend position is now bottom right, and you can change the legend position and alignment. Define a custom color palette for a graph matrix; changes to the dashboard palette do not affect the custom-colored graph matrix.
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- When you edit a dashboard with a locked page size, the canvas displays in its actual size which may be bigger than the available display area, making it difficult to view and design the full dashboard. To alleviate this, enable a preview feature to display a zoom level drop-down list when you are editing dashboards. Use the drop-down list to scale the canvas to a specific percentage, fit the canvas to the available display area, or fill the available display area with the canvas.

Reports

- Create a report theme (a predefined grid format). Apply it to a report to update multiple formatting settings at once. For steps, see Create a Report Theme and Create and Edit Reports.
- Create an MDX cube report using an imported MDX cube as the data source. For steps, see Create an MDX Cube Report in Strategy Workstation and Library.
- Filter intelligent cube reports using prompts. You can add an existing prompt directly to the report's view filter, or you can create an embedded prompt within the view filter.
- Right-click an object in the Report Objects or All Objects panels to edit, preview, or view properties.
- Create a new intelligent cube report based on an existing intelligent cube and re-point grid reports to a different cube. For steps, see Repoint a Grid Report to a Different Cube (OLAP Cube) in Strategy Workstation and Library.

Prompts

- Create a prompt within a filter. This embedded prompt is saved within the filter and cannot be used in other objects. For steps, see Create Filters.
- Format how a prompt displays. Options include the style (such as pull-down list or check box) and allowing a search box, among others.

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- Create tables in Schema Editor using Freeform SQL with system prompts. Requires "Enable System Prompt in Logical View" feature flag and relevant privileges.

Administration

- Encryption and signing support for delivery devices to enhance data security.
- Add encryption keys to users and contacts for encrypted delivery devices.
- Customize subscription retry attempts for email and FTP delivery devices.
- Cc and Bcc recipients in bursting email subscriptions. The Cc and Bcc recipients receive all generated slices, making it easier to monitor and validate bursting results. For details and steps, see Bursting for Email Subscriptions.
- Duplicate an existing data source to efficiently create similar connections. All relevant settings are copied and can be edited.
- Quickly rename a data source, database connection, or database login using the right-click menu.
- When you switch database drivers while editing a database connection, all connection information (such as credentials and configuration) is retained. You do not need to re-enter these details.
- Database type names in the connection list are updated, clear, and consistent. For example, Snowflake is shown instead of snow_flake.
- Optionally enter a description of your change when saving a data source, database connection, database login, vault connection, or subscription.
- Access, review, and manage VLDB properties for data sources directly in a project.

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- Scope Filters are available out-of-the-box to improve migration behavior. Create scope filters to reduce dataset size for performance improvements and to further customize your data.
- View table relationships in the schema editor.
- Attribute editor enhancements:
  - Auto Mapping is available which, when enabled, automatically selects all available tables that contain columns used in the expression as source tables.
  - Use the context menu to preview tables.
- Auto Mapping is available in the fact editor.
- Open the attribute editor from the hierarchy editor.
- Imported tables are bold in the Catalog table list of the schema editor.
- Delivery address enhancements:
  - Addressed an issue with saving newly added delivery addresses.
  - View emails in delivery addresses, delete emails, and create new contacts from emails.
- Users and user groups enhancements:
  - Previously opened groups are reopened when saving users or groups.
  - Drag and drop users and user groups to move them to a new user group.
  - Create a new user or user group from the user group right-click menu. Users created using this method are automatically added to the selected user group.
  - A tooltip displays next to the Email Address field if the field is required.

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    - The Project Access & Roles and Privileges pages are consolidated into a Roles and Privileges page.

- Define server-level access to users and user groups.
- Use the Debug Console to trace REST API calls made by Workstation including the request URL, method, payload, response status, and execution time. Administrators can click and drag the Debug Console icon to move it around their Workstation window.
- Import detailed user information via the HTTP header during Trusted Authentication.
- Import folders using migration packages.
- Add gateway agents to your HashiCorp Vault, Azure Key Vault, and Google Secret Manager vault connections.
- Add a LDAP Authentication DN (Distinguished Name) when configuring OIDC authentication.
- Use the contains search object option to find reports, dashboards, and documents that are dependent on specific objects.
- Automatically set a user's language by passing a locale value through a SAML attribute during authentication.
- Generate detailed documentation by object type or folder using the Documentation blade, REST APIs, or Python scripts in Workstation. Export outputs in Excel, CSV, or JSON format.
- Administrators can now idle or resume individual projects and purge specific content caches, such as reports, documents, dashboards, objects, and elements, directly from the project level in Workstation, enhancing maintenance and data freshness.
- Assign cost values to jobs and categorize them as Light, Medium, or Heavy to control execution priority. Configure cost groupings and priority

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levels in the Job Prioritization settings under data source properties in Workstation.

- Sync SAML attributes as a User Language when enabling single sign-on with SAML authentication.

Strategy for Office

Excel

Further customize your add-in using custom branding.

PowerPoint

- Import documents as images.
- Further customize your add-in using custom branding.

Strategy for Google Sheets™

- Import report service documents.
- Import data as a pivot table.
- Automatically refresh data when you open a workbook and define refresh intervals.
- Clear data from a workbook without removing them from the side panel.

Strategy for Google Slides™

This release introduces the Strategy for Google Slides™ add-on that lets you easily import enterprise dashboards from Strategy into your presentation.

Strategy HyperIntelligence

Use an unlinked Mosaic model as the data source when you create a card. This brings the power of Mosaic Studio to HyperIntelligence, enabling more

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robust and flexible cards.

Strategy Library Mobile

iOS

- Add a background image to a page.
- Support for Intune native EMM SDK for Xcode 16.

Platform Analytics

Kafka operates in KRaft mode and removes ZooKeeper. This update enhances performance, improves resilience, and aligns with the latest Kafka architecture.

⚠ Migrating existing data is not supported. All existing telemetry data must be fully processed before upgrading to Strategy One (December 2025).

Strategy Managed Cloud Enterprise

The Data Gateway service was updated to support HashiCorp Vault, Azure Key Vault, and Google Secret Manager on-premises vaults.

Strategy Managed Cloud Standard

The Data Gateway service was updated to support HashiCorp Vault, Azure Key Vault, and Google Secret Manager on-premises vaults.

Strategy Packages for Python (mstrio-py)

New features

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- Added the `journal_comment` argument to the `delete()` method.
- Added the `journal_comment` argument to the `create()` and `alter()` methods for: `Fact`, `User`, `UserGroup`, `ContentGroup`, `Calendar`, `Attribute`, `Filter`, `Metric`, `Prompt`, `SecurityRole`, `Transformation`, `TimeZone`, `LogicalTable`

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability, support new functionality, and fix functionality and performance issues for the following drivers:

  - Redshift ODBC driver
  - SQL Server Native JDBC driver
  - Sybase ASE ODBC and JDBC drivers

- Import multi-dimensional tables with tabular grid format from Microsoft Fabric.

Privileges

See Privileges by License Type for information about license types and associated privileges.

- The **Client - Application API** license was added to the **Cloud Reporter User** bundle.
- The **Use Mosaic Sentinel** privilege was added to the **Mosaic Universal Access** license.

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- The **Monitor Activity** privilege was added to the **Server Intelligence - System** license.
- The **Use Auto Voice** privilege was added to the **Strategy AI** license.
- The **View Workstation Debug Console** privilege was added to the **Server - Intelligence** license.

Strategy One (November 2025)

Mosaic

- Added support for the STACKIT Llama-3.3-70B AI model. To provision the STACKIT environment with AI enabled, contact Strategy support.
- If you update your Mosaic model metric formatting in Mosaic Studio, the formatting applies to Power BI after a refresh.
- Mosaic model metric descriptions display in Power BI.

Strategy AI

Auto Answers

Added Ingestion Service and agent support for the STACKIT Llama-3.3-70B AI model. Knowledge assets, element search, and learning are not supported in the STACKIT Llama-3.3-70B AI model for Auto Answers.

Agents

Enable structured datasets for AI using Strategy Library as well as Workstation. For prerequisites steps, see Enable a Dataset in Library.

Auto Dashboard

- Use free-form layout to organize and overlap the containers that contain your dashboard objects. You can independently position, size, and layer

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containers on a page.

- Filter data at the chapter level by adding, removing, and setting chapter filters.
- Apply a shadow effect on object containers.
- Create bar charts with rounded corners.

Strategy Library

Dashboards

- You can apply a shadow effect on the containers of objects. You can define the fill color, opacity, and size of the shadow. You can apply a shadow to:
  - Visualizations
  - Text
  - Panel stacks
  - Selector panels
  - Information windows
  - Selector windows
  - Default formatting for all the objects in a dashboard (use the Dashboard Formatting Properties dialog box)
- Create bar chart visualizations with rounded corners. In the Format panel, under Data Labels and Shapes, you can define the radius.
- Hide text boxes, selectors, HTML containers, images and shapes before exporting a free-form layout dashboard to Excel.
- ESRI map U.S. Zip Codes and U.S. Counties boundary layers were deprecated for compliance with ESRI.

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- The enhanced KPI visualization is shipped out of the box and renamed iconic KPI. For examples and steps to create it, see Create an Iconic KPI Visualization.
- If you display all the panels in the Dashboard Editor, the layout area can become very narrow, making it hard to design the dashboard. To alleviate this issue, the following changes were made to improve the user experience:
  - A new left-side toolbar lets you show or hide individual panels with a single click.
  - The Contents and Datasets panels are stacked together to save space.
  - You can organize the Editor, Filter, and Format panels vertically, one above the other to save space.

  For details and steps, see Main Dashboard Screen.

Reports

- Create and apply report templates to simplify report creation and ensure consistency among reports.
- Define dynamic dates when you answer a prompt.

Administration

- An application can use the Browse Folders view as its home screen. When enabled, Browse Folders displays at the top of the sidebar. For steps to enable it, see Application Home Screen in Workstation.
- Search and navigation has been optimized. The search functionality is more prominent, relevant, and efficient for users. Key changes include categorizing search results by type and opening dashboards in a separate browser tab from the search results.

Strategy Workstation

Dashboards

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- You can apply a shadow effect on the containers of objects. You can define the fill color, opacity, and size of the shadow. You can apply a shadow to:
  - Visualizations
  - Text
  - Panel stacks
  - Selector panels
  - Information windows
  - Selector windows
  - Default formatting for all the objects in a dashboard (use the Dashboard Formatting Properties dialog box)
- Hide text boxes, selectors, HTML containers, images and shapes before exporting a free-form layout dashboard to Excel.
- ESRI map U.S. Zip Codes and U.S. Counties boundary layers were deprecated for compliance with ESRI.
- The enhanced KPI visualization is shipped out of the box and renamed iconic KPI. For examples and steps to create it, see Create an Iconic KPI Visualization.
- If you display all the panels in the Dashboard Editor, the layout area can become very narrow, making it hard to design the dashboard. To alleviate this issue, the following changes were made to improve the user experience:
  - A new left-side toolbar lets you show or hide individual panels with a single click.
  - The Contents and Datasets panels are stacked together to save space.

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- You can organize the Editor, Filter, and Format panels vertically, one above the other to save space.

For details and steps, see Main Dashboard Screen.

Reports

- Create and apply report templates to simplify report creation and ensure consistency among reports.

Administration

- New options have been added to History List and mobile subscriptions. You can:
  - Select **Re-run Against the Warehouse** to create caches or update existing caches when the content is executed. This option is disabled by default.
  - Select **Do Not Create or Update Matching Caches**. This option is disabled by default.
- For a project, object, or user, you can enable or disable:
  - Delivering the subscription if the report or document execution returns no data. By default, results are not delivered. You can type text to be delivered in case of such a no data returned failure.
  - Delivering the subscription if the report or document execution returns only some of the data. Partial results are delivered when the size of the report or document exceeds the memory governing setting for Maximum memory consumption for PDF files and Excel files. By default, results are not delivered. You can type text to be delivered in case of such a partial results failure.
- An application can use the Browse Folders view as its home screen for Library Web. For steps to enable it, see Application Home Screen.

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- Dynamic address lists were updated to optimize load balancing in clustered environments. Previously, when a subscription delivered to a dynamic list in a clustered environment, a different email group was created for each node. Now, all nodes use the same group.
- Rename migration packages.
- A new **Path** column was added to the New Migration Package dialog.
- Easily add content to the new Favorites panel to quickly access your most-used objects such as reports, dashboards, folders, and more in an environment. See Adding Content as Favorites.
- Support for passphrase encrypted client keys in CyberArk and HashiCorp vault connections.
- A new File Encoding for Distribution Service Delivery project-level setting was added that allows you to choose a file encoding option for Distribution Service subscriptions outputs.
- Create security filters while configuring JWT authentication.
- Manually pass system prompts for single sign-on and standard users.
- Added the **Allow Administrators to manually define system prompts for users** and **Reuse persisted system prompt for SSO when not provided** server-level settings to support manually passing system prompts.
- A Change Journal Management Python module has been added, enabling users to list, purge, and configure Change Journal entries using Python.
- Added Internal Comments to the following properties dialogs:
  - Schedules
  - Events
  - Subscriptions

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- Added a Subscriptions Properties button to the Manage Subscriptions dialog.
- Added Security Access and Change Journal to the Subscriptions properties dialog.
- Use the Schema Editor to create tables using Freeform SQL with system prompts.

Strategy Managed Cloud Enterprise

- The Data Gateway service was updated to support clusters.
- Updated mstr user security to safeguard cloud operations including restricting password changes, privilege restrictions, and pre-upgrade checks.

Strategy Managed Cloud Standard

The Data Gateway service was updated to support clusters.

Strategy Library Mobile

iOS

Search and navigation has been optimized. The search functionality is more prominent, relevant, and efficient for users. Key changes include categorizing search results by type and opening dashboards in a separate browser tab from the search results.

Strategy Library Mobile SDK

iOS

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- The minimum system requirements to develop and compile your application were updated. You must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.
- Starting with iOS 13, Apple shifted to a scene-based application lifecycle using UIScene and UISceneDelegate, so adding functionality with the custom application delegate is no longer recommended. Instead, follow the steps in KB489550: Add Functionality with a Custom Scene Delegate for Strategy Library iOS. If you still want to use the custom application delegate, follow the steps in KB489551: Add Functionality with a Custom Application Delegate for Strategy Library iOS.

Strategy Mobile SDK

iOS

- The minimum system requirements to develop and compile your application were updated. You must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.
- Starting with iOS 13, Apple shifted to a scene-based application lifecycle using UIScene and UISceneDelegate, so adding functionality with the custom application delegate is no longer recommended. Instead, follow the steps in KB489555: Add Functionality with a Custom Scene Delegate in Strategy Mobile iOS. If you still want to use the custom application delegate, follow the steps in KB489554: Add Functionality with a Custom Application Delegate in Strategy Mobile iOS.

Strategy Packages for Python (mstrio-py)

New features

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- Added the `change_journal` property to view object change journal entries.
- Added the `list_change_journal_entries` function to list change journal entries across your environment with specified filters.
- Added the `purge_change_journal_entries` function to purge change journal entries in specified projects.
- Added the `purge_change_journals` method to `Project` class to purge selected project change journal entries.
- Added the `purge_all_change_journals` method to `Environment` class to purge change journal entries for every project.
- Added the `purge_configuration_change_journals` method to the `Environment` class to purge change journal entries for configuration objects.

Minor changes

- Added a set of `folder`-related parameters to filter in listing and creation methods in majority of existing modules. For more information, see the mstrio-py documentation or class-specific code snippets for details regarding their use.
- Added a `temporary_project_change` context-method to the `Connection` class for temporary project selection ease where keeping the old project long-term is important.
- Added option of initialization of `Folder` class by its name. For more information about risks of this approach, see the mstrio-py documentation.
- Added the `on_nodes` argument in the `Project.is_loaded()` method to check specific nodes' status.
- Added the `check_all_selected_nodes` argument in the `Project.is_loaded()` method to use logic that requires all nodes to have the project

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loaded.

- Added a `config_mgmt.py` code snippet for mstrio-py's configuration.
- Added the `disconnect` alias to the `close` method on the `Connection` object.
- Added the `open` alias to the `connect` method on the `Connection` object
- Added the `request_timeout` and `request_retry_on_timeout_count` parameters to the `Connection` object and the `set_request_timeout` and `set_request_retry_on_timeout_count` methods. A global config `default_request_timeout` parameter was also added to customize timeout and retry logic on mstrio-py's requests to REST API.
- Added the `get_valid_page_by_elements` method to the `Report` class to get all possible elements combinations for page by attributes.
- Added the `valid_page_by_elements` property to the `Report` class that stores valid page by elements combinations.
- Added the `get_selected_page_by_elements` method to the `Report` class to get a list of page by elements based on a valid combination.
- Enhanced the `find_objects_with_id` method to find any object type by ID, regardless of whether it is configuration-level or project-level, in an efficient manner.
- Extended the `Delivery.DeliveryMode` enum with `SHAREPOINT`, `ONEDRIVE`, and `S3` entries for support in listing existing subscriptions.

Breaking changes

Performed holistic cleanup and standardization regarding `folder`-related parameters. This cleanup included removing and renaming the obsolete `destination_folder_id` parameter from many methods. If you were using this parameter in your script, see the mstrio-py documentation more information.

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Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability, support new functionality, and fix functionality and performance issues for the following drivers:

  - Foundry JDBC driver
  - Google BigQuery JDBC driver
  - Oracle ODBC and JDBC drivers
  - Snowflake ODBC and JDBC drivers
  - SQL Server ODBC, JDBC, and Native JDBC drivers
  - Teradata ODBC and JDBC drivers

Strategy One (October 2025)

Mosaic

- Support for OAuth in the Strategy connector.
- Enhanced Auto SQL to automatically suggest relevant tables based on your chat entry, eliminating the need to manually add tables.

Strategy AI

Agents

- *Preview Feature*: Select AI-enabled data models as datasets for agents. A data model is a graphical representation of the flow and structure of data.

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Use Mosaic Studio to expedite your data modeling. The agent interprets the questions, detects the relevant data model, and responds with answers based on the metrics and relationships defined in that model. Using a data model enhances flexibility and depth in the agent's answers. For steps, see Preview Feature: Create an Agent from a Data Model.

- Agents support images and HTML content in grids, providing richer, more interactive answers. Visual results such as charts, product images, avatars, or status icons display alongside text and numbers in the grid. This streamlined workflow makes it easy to review, compare, and understand data at a glance—perfect for browsing items, monitoring statuses, or previewing products directly within your agent. Empower your decisions with clearer, more informative results.

Auto Dashboards

- Auto Dashboard understands historical context such as "Change this to a bar chart" and "Change the color of it to yellow" when you modify objects.
- Auto Dashboard offers real-time, step-by-step visual feedback and clear loading indicators to keep you informed of its progress. Loading messages display in a banner—not the chat stream—so you can easily cancel actions at any time. Dashboard creation is transparent, engaging, and user-friendly.
- You can apply gradient colors when using Auto Dashboard. Gradient colors blend two colors to create a gradual color change in an object, creating an enhanced look and feel for your dashboards.

Strategy Library

Dashboards

- *Preview Feature*: You can allow end users to view the query execution progress when running a dashboard, which provides greater transparency

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and insight. For steps to enable the feature and a description of the steps, see Preview Feature: Incremental Visualization Rendering.

- Set the dashboard's default formatting for the:
  - Page padding
  - Layout of title buttons
  - Radius of the container's corners

  See Define Default Formatting for Objects in the Dashboard.
- Apply a gradient color to graph shapes in dashboard visualizations. Gradient colors blend two colors to create a gradual color change in the shape. You can select the colors and the direction of the gradient blending: top to bottom or left to right. For details, see Format Panel for Graph Visualizations.

Reports

The user experience for creating reports has been streamlined to reduce the number of clicks and loading time. Specifically:

- The Report Objects panel and All Objects panel display at the same time instead of stacked. This makes it easier to view and move objects.
- The All Objects panel includes shortcuts to Attributes, Metrics, Hierarchies, and Data Explorer, eliminating the need to navigate to these folders.

Administration

- Enhanced cognitive element filter search for faster and more accurate results.
- Change the cover page image from the Library Home page.
- You can choose to run the subscription according to each recipient's own

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time zone instead of the schedule's time zone. See Subscription Editor in Library.

Strategy Workstation

Dashboards

- *Preview Feature*: You can allow end users to view the query execution progress when running a dashboard, which provides greater transparency and insight. For steps to enable the feature and a description of the steps, see Preview Feature: Incremental Visualization Rendering.
- Set the dashboard's default formatting for the:
  - Page padding
  - Layout of title buttons
  - Radius of the container's corners

  See Define Default Formatting for Objects in the Dashboard.
- Apply a gradient color to graph shapes in dashboard visualizations. Gradient colors blend two colors to create a gradual color change in the shape. You can select the colors and the direction of the gradient blending: top to bottom or left to right. For details, see Format Panel for Graph Visualizations.

Reports

- Convert a report to an Intelligent cube in Workstation.
- The user experience for creating reports has been streamlined to reduce the number of clicks and loading time. Specifically:
  - The Report Objects panel and All Objects panel display at the same time instead of stacked. This makes it easier to view and move objects.

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- The All Objects panel includes shortcuts to Attributes, Metrics, Hierarchies, and Data Explorer, eliminating the need to navigate to these folders.

Prompts

Create a level prompt, which allows the user to select, during report execution, the level of calculation (or dimensionality) for a metric. For steps, see Create a Level Prompt to Define the Calculation Level for a Metric.

Administration

- Users can unlock schemas they have locked themselves even if the user does not have the Bypass schema objects security access checks privilege.
- Translate the following configuration objects:
  - Database connections
  - Database logins
  - Vault connections
  - Events
  - Schedules
  - Transmitter delivery types
  - Delivery devices
  - Languages
  - Calendars
  - Time zones
- Connect directly to an application object when logging into an environment by appending the `CustomApp?id` parameter to the environment URL.

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- Enhanced support for Mosaic models in Global Search and Search Objects within Workstation. This update replaces the old MTDI icon with a new Mosaic Model icon in Workstation's Global Search and Search Object editor with filtering options to refine results by Mosaic Model object type.
- Users can now use Amazon S3 subscriptions to deliver dashboards, documents, or reports to Amazon S3 buckets.
- Users can now create Baseline and Comparison tests for the following objects:
  - Data Import Cube
  - Freeform SQL Cube
  - Intelligent Cube
  - Live Intelligent Cube
  - Python Query Cube
  - Mosaic Model
- You can quickly assign a language preference to multiple users at the same time. Steps are provided in Time-Based Reporting.
- You can assign a language preference to a user group. Steps are provided in Time-Based Reporting.
- Enhanced cognitive element filter search for faster and more accurate results.
- User comments were added to the Save dialog in the following objects:
  - Cards
  - Consolidations
  - Custom groups

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  - Derived elements
  - Drill maps
  - Facts
  - Filters
  - Hierarchies
  - Logical tables

- Support for gateway agents to create on-premises CyberArk or AWS Secrets Manager vault connections with cloud environments.
- You can choose to run the subscription according to each recipient's own time zone instead of the schedule's time zone. See Create Email Subscriptions. Alternatively, you can set a custom time zone at the schedule level, as described in Create and Edit Schedules.

Strategy Managed Cloud Enterprise

- The Data Gateway service was updated to support Windows and Linux and was redesigned.
- Seamlessly migrate from instance-based deployments to container-based deployments.
- Added disaster recovery support for Azure environments and enable easy disaster recovery set up.

Strategy Managed Cloud Standard

The Data Gateway service was updated to support Windows and Linux and was redesigned.

Strategy for Office

Excel

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Support for page-by reports in the Excel Migration Assistant.

Intelligence Server

If the Memory mapped files free disk space requirement is not satisfied when starting up the Intelligence Server, a message displays in `DSSErrors.log` and the Intelligence Server dynamically checks free disk space when a cube is loaded or published.

Strategy Library Mobile

iOS

Customized padding and corner radius for dashboard objects are supported in Library iOS.

Platform Analytics

Move unused, old data from an environment's historical tables to cloud storage to reduce the size of the Platform Analytics warehouse. This also improves query performance. You can restore the historical data if needed. For information, see Archive Historical Platform Analytics Transaction-Level Data to Cloud Storage.

Strategy Packages for Python (mstrio-py)

New features

- Updated the `SearchObject` class.
  - Added the `alter` method.
  - Released the `create` and `run` methods for general availability.
- Added the `list_search_objects` function.

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- Added support for LDAP batch import management in the `Environment` module.
- Added the `delete_unused_managed_objects` method to the `Project` class to add the capability to delete unused managed objects in a specific project.

Minor changes

- Added arguments `description`, `query_modification_time`, `query_creation_time`, `owner`, `locale_id`, `include_hidden`, `include_subfolders`, `exclude_folders` and `scope` to the `full_search` and `start_full_search` functions.
- Enabled passing `SearchObject` as content for object migration.
- Added the `has_dependents` method to the `DependenceMixin` class.
- Added the `scope` parameter into the `DependenceMixin`'s methods.
- Added support for `ObjectSubTypes` for `object_type` parameter in `list_objects`.
- Improved the `Usage Remarks` section of mstrio-py's documentation with instructions on how to use `project`-related parameters, how to recognize types and subtypes, and how to apply `**filters` in listing methods

Deprecated

- `mstrio.project_objects.bots` module is superseded by `mstrio.project_objects.agents` and will be removed in the future.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Certified gateway Vertica version 25.x.

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Strategy One (September 2025)

The September 2025 release includes the following updates in addition to the previously released cloud July 2025 and August 2025 updates for on-premises customers.

Strategy AI

- Enhanced bots are now available. They have been renamed to agents to reflect the improvements and advancements. To get started with agents, see agents: Customized Stand-Alone Bots.
- Visualizations in agent answers have been enhanced. Examples include automatically totaled grids and breaking a line graph by a specific attribute. For details, see Ask Questions in an Agent.
- Enable key driver and deep research to answer your queries in an agent. When enabled, Auto uses a reasoning model to generate a deep research report to analyze the question.
- Provide feedback on an agent's answers. Quickly rate a response with a thumbs up or thumbs down, to help the agent improve its understanding and accuracy over time through iterative learning.
- Image-based dashboard creation: Upload a picture of a dashboard and Auto Dashboard generates a similar one for you.
- Experience more visually harmonious dashboards with an enhanced color palette system in Auto Dashboard.
- Display an AI-generated summary of an entire dashboard page using auto narratives. For steps on creating and using it, see Auto Narratives for Dashboard Pages.
- Create a retail analytics agent by selecting a pre-built template. The template's workflow guides you through creating the agent.

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Mosaic

Power BI

- Connect to Power BI Using SSO.
- DAX improvements including subtotal calculations and support for quick measures and new measures.

Sources

- Use the Strategy connector to import data from one Strategy environment to another.
- You can now upload multiple local files from the same page rather than returning to the main Sources dialog.
- The Clipboard import was updated to improve paste behavior.
- The Google Big Query connector was updated to improve table selection.
- Use vault secrets in your data source connections.
- A description of your data sources are automatically generated.
- To select multiple tables in the Sources dialog, hover over a table and select the check box next to the table when adding tables to a model and in Free-form SQL mode.
- Add column qualification and custom expression filters to your database tables.

Mosaic Models

Translate Mosaic model objects into multiple languages.

Strategy Library

Dashboards

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- *Preview Feature*: Configure dashboards to load visualizations incrementally as data is available.
- *Preview Feature*: Create an Enhanced KPI visualization that allows you to upload your own image to further customize your visualization.
- Support for embedding dashboards via iFrame without cookies for seamless authentication and to avoid disruption due to cookie limitations.
- A new **Scale to fit container width** setting was added to the Share dialog and Dashboard Properties. Use this setting to control whether a visualization automatically resizes to fit the width of its container.
- Create an alert subscription that sends as a mobile push notification, ensuring your users receive alerts in their preferred format and on their preferred device. For steps, see Create an Alert Subscription for a Dashboard.
- When you save a dashboard, you can choose to save the dashboard, exit editing, and view the dashboard. This option, formerly labeled Save and Open, is now labeled as Save and View.
- Dashboard authors can adjust the padding for dashboard pages, panels, and information windows in Automatic Layout.
- When you change the default export settings for PDF, you can access Advanced Mode in the Dashboard Properties dialog box. Use it to format customized PDF headers and footers, and preview the customizations and formatting.
- Add selector panels and selector windows to enhance the filtering experience. Selector panels act as mini dashboard canvases that contain filters, selectors, text, images, HTML containers, and shapes. A selector window functions as a selector panel within an information window. Users viewing your dashboard can use the selector panel or window to modify multiple filters in bulk and confirm their selections with the Apply button or

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cancel them using the Cancel button. For steps to create them, see Create a Selector Panel or Window.

- Adjust the radius of rounded corners for object containers.

Dashboards and Reports

- Create a snapshot without executing the dashboard or report. This makes it even easier and faster to save items for quick viewing later. Take a snapshot of an existing dashboard bookmark. For steps, see Send Dashboard and Document Execution to the Background and Create a Snapshot.

Reports

- Subscribe reports in CSV format.

Administration

- On the sidebar, Bookmarks displays your dashboard, document, and report bookmarks so you can easily access them.

Strategy Workstation

Strategy AI

- Enable Auto Summaries for an application. These are AI-generated summaries of an entire dashboard page. For steps to enable it, see Customize Application Components.
- Auto SQL has been deprecated and retired.

Administration

- *Preview Feature*: Create Scope Filters to reduce dataset size for performance improvements and to further customize your data.
- User preferences for view type, Arrange By, and Sort By are now saved and persist between sessions.

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- Updated Monitor Projects dialog makes it easier to access a variety of project management tasks such as project properties, creating migration packages, deleting projects, and configuring project loads.
- Filter search by Mosaic models.
- Support for users to specify whether to hold data updates in Dashboard until all project cubes complete refresh.
- Pause and resume subscriptions from the Subscription Monitor.
- Added support for MDX cubes. This is a Workstation specific user experience that lets you access, import, manage, map, and customize MDX Cubes.
- Display system status messages in a separate header and footer for your application. This allows you to communicate important information to Library business users in a visible yet non-disruptive way. For steps and examples, see Display a Status Message for an Application.
- Enable the Bookmarks component to display in the sidebar of your application. For steps, see Customize Application Components.
- Specify a list of allowed email domains, like a whitelist, for email subscriptions. You can set this at the project, folder, and object level. For steps and examples, see Specify Allowed Import URLs and Email Domains for the project level and Allow Custom HTML and JavaScript and Email Domains for the object level.
- Set metadata and data languages independently at the project and user level. This resolves inconsistent language settings by providing granular control over each language type. You can ensure that the metadata displays in the desired corporate language while maintaining flexibility for user interface and data preferences. This enhancement improves multilingual workflows and reduces errors. You can also configure the data language to be based on SQL or connection mapping. For an example, see

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the introduction in Time-Based Reporting; for steps, see Enable Data Internationalization in a Project and Set the Project-Level Language and Assign Default Internationalization Objects for Users and User Groups.

- Limit the number of projects a user can connect to an environment. For steps, see Edit All Server-Level Settings. When a user reaches the maximum number of connected projects, the Project List dialog box displays a notification and disables further project selection. For steps to connect projects, see Edit Project List.
- Define VLDB settings for custom groups to customize the SQL that is generated and determine how data is processed by the Analytical Engine. It allows you to define how the custom group interacts with the report filter. For steps, see Create Custom Groups.
- Support for multiple Google Analytics data sources and service account authentication to access Google Analytics data.
- Support for System for Cross-Domain Identity Management (SCIM) and certify Entra ID and Okta.
- Support for JWT authentication to the Library server.

Dashboards

- *Preview Feature*: Configure dashboards to load visualizations incrementally as data is available.
- *Preview Feature*: Create an Enhanced KPI visualization that allows you to upload your own image to further customize your visualization.
- Dashboard authors can adjust the padding for dashboard pages, panels, and information windows in Automatic Layout.
- A new **Scale to fit container width** setting was added to the Dashboard Properties. Use this setting to control whether a visualization automatically resizes to fit the width of its container.

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- Enable a new Dashboard Editor in Workstation. This enhanced authoring experience has even more parity with Library capabilities, delivering a more consistent user experience. For details and steps to enable it, see New Dashboard Editor in Workstation.
- When you change the default export settings for PDF, you can access Advanced Mode in the Dashboard Properties dialog box. Use it to format customized PDF headers and footers, and preview the customizations and formatting.
- Add selector panels and selector windows to enhance the filtering experience. Selector panels act as mini dashboard canvases that contain filters, selectors, text, images, HTML containers, and shapes. A selector window functions as a selector panel within an information window. Users viewing your dashboard can use the selector panel or window to modify multiple filters in bulk and confirm their selections with the Apply button or cancel them using the Cancel button. For steps to create them, see Create a Selector Panel or Window.
- Adjust the radius of rounded corners for object containers.

Strategy Managed Cloud Environment

- Added Vertica ODBC and JDBC drivers to MCE container environments.
- Updated Intelligence Server port communication security.

Strategy Mobile

iOS

Support for iOS 26 and iPadOS 26.

Strategy Library Mobile

iOS

Support for iOS 26 and iPadOS 26.

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Strategy for Office

Excel

- Group imported objects to perform bulk actions such as re-prompting and re-filtering.
- Define which cell to import content into.

PowerPoint

- Group imported objects to perform bulk actions such as re-prompting and re-filtering.

Strategy for Google Sheets™

- Thresholds and formatting is maintained between dashboards and Google Sheets™.
- Import visualizations as images.
- Re-prompt multiple objects at once and re-use prompt answers.
- View an Overview window with details on imported content.
- Worksheets are automatically assigned a name after import.
- Enhanced import functionality to support larger content types, including full dashboards, chapters, pages, and panel stacks.

Intelligence Server

- The size of a SmartHeap setting was doubled to support smarter memory governing for larger machines.
- Session failover support was extended to Mosaic model creation, application object editor operations, and Web.

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- The default value for the **MMFDiskSpaceThresholdPercent** registry key was updated to 40% in container environments.

Strategy Packages for Python (mstrio-py)

New features

- Updated the `SearchObject` class.
- Added properties related to search query.
- Preview: Added methods create and run.
- Updated Prompt class to support general prompt management.

Minor changes

- Updated `Project.load()` and `Project.unload()` to use more performant endpoint with server-wide operations.
- Improved answering prompts in Report, Document, Dashboard, and Subscription.

Deprecated

- `mstrio.project_objects.prompt` module is superseded by `mstrio.modeling.prompt` and will be removed in the future, after a 1-year deprecation period.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability, support new functionality, and fix functionality and performance issues for the following drivers:

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  - Clickhouse JDBC driver
  - Hive JDBC driver
  - Impala JDBC driver
  - MongoDB JDBC driver
  - SQL Server Native JDBC driver
- Certified Trino OAuth and OIDC authentication with Microsoft Entra ID and Okta.
- Support for Ping as an Identity Provider for Snowflake.

Strategy One (August 2025)

> Strategy no longer bundles Monotype licensed fonts. Instead, the platform now bundles a set of new Google fonts. If any Monotype font is installed on the operating system on the device where you view content, you can still use it in your dashboard, report, or document. For more information, see Monotype Font Replacement.

Strategy Library

Mosaic

- Update your column data type.
- Define custom date, time, and datetime parse patterns for your data.
- Security filters no longer require security filter specific privileges to create and assign Mosaic model security filters.
- Object-level security was updated to require Manage Access to be enabled in the application.

Strategy AI

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- Users may refer to dataset columns with alternative names, abbreviations, or phrases. Add these alternatives as aliases for column names. This helps map user questions to the relevant attribute forms or metrics, reducing ambiguity and enhancing the accuracy of bot responses.
- Bots provide intelligent, individualized answers mapped directly to each user's context, roles, and permissions with improved personalization. The bot can accurately recognize and map user identity ("I", "me", "my") to the right attributes and objects during conversations, regardless of different system formats or naming conventions, such as variations in comma usage or the order of first and last names. This ensures consistent, personalized responses by reliably linking user identity to relevant data throughout a chat with multiple queries.
- Bots can respond with waterfall charts to help users better understand the cumulative effects, both positive and negative, of metric values across an attribute in a visual way. By default, it displays the difference, but you can change it to show the sum.
- For exporting answers to CSV, the export limit is increased to 100,000 rows so you export larger datasets. Data with different locales is correctly displayed in the exported file; however, certain formatting details, such as color, may be lost.
- For exporting answers to Excel, the export limit is increased to 100,000 rows and Excel reports retain column formatting. This means you can export larger datasets while preserving the original format, including data with different locales. Certain complex custom formatting may not be supported in Excel; the exported Excel file displays it as raw, unformatted data.
- You can define custom tags and assign them to unstructured data in Workstation. Tags act as descriptive labels—similar to hashtags on social media—that help to identify, categorize, and group your data based on relevant attributes or themes. This improves search results so that bots

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can more easily locate related items and perform targeted queries within large collections of unstructured data.

Dashboards

- Copy multiple elements to any page or chapter.
- When you create a contextual link, you can filter additional pages in the target dashboard, not just the one initially opened in the link. The target page displays when you use the link, but the selected pages are also filtered. This helps pass the filter context to other pages. For steps, see Use a Visualization to Filter Data in a Different Dashboard, Link from a Prompted Dashboard to a Different Dashboard, and Link a Text Field or Image to a Dashboard.
- You can resize all the containers in a group at the same time. For steps, see Group Containers in Free-Form Layout.
- You can create a dynamic selection filter that filters on a parameter. Use dynamic default filters to set the First N / Last N items from a filter and avoid manual updates to stay up to date. For steps to create dynamic filters, see Create a Default Dynamic Selection Filter; for steps to create a parameter, see Create Parameters.
- Dynamically pass element prompts using the URL API.

Reports

- You can export reports to CSV files from Library Web. You can select how to export the page-by fields and choose the delimiter for the file. For steps, see Share a Report.

Documents

- You can send document execution to the background so that you can perform other operations in Library. Running in the background creates a

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snapshot. For more information, including how to create and access snapshots, see Send Dashboard Execution to the Background.

Strategy Workstation

Mosaic

Support for OAuth in Mosaic model refreshes.

Administration

- Manually triggered subscriptions (such as Send Now) were updated to follow schedule fencing.
- View derived metrics in object settings to view system managed objects.
- Leverage the User Connections Monitor to view users connected to projects within an environment and, if needed, disconnect them.
- Manage Access Control List (ACL) for children objects within folders.
- Create email subscriptions with contents from multiple projects. For steps, see Create Email Subscriptions.
- Define VLDB settings for attributes to customize the SQL that is generated and determine how data is processed by the Analytical Engine. For definitions of the properties, see Create and Edit Attributes.
- Specify the dashboard filter's evaluation mode. For steps, see Edit All Project-Level Settings.

Dashboards

- Copy multiple elements to any page or chapter.
- When you create a contextual link, you can filter additional pages in the target dashboard, not just the one initially opened in the link. The target page displays when you use the link, but the selected pages are also filtered. This helps pass the filter context to other pages. For steps, see

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Use a Visualization to Filter Data in a Different Dashboard, Link from a Prompted Dashboard to a Different Dashboard, and Link a Text Field or Image to a Dashboard.

- You can resize all the containers in a group at the same time. For steps, see Group Containers in Free-Form Layout.
- You can create a dynamic selection filter that filters on a parameter. Use dynamic default filters to set the First N / Last N items from a filter and avoid manual updates to stay up to date. For steps to create dynamic filters, see Create a Default Dynamic Selection Filter; for steps to create a parameter, see Create Parameters.

Metrics

Support for non-additive metrics, such as distinct counts, aggregation in live-connect datasets.

Platform Analytics

- New cubes with aggregate tables were added for resource efficiency and performance benefits.
- Redesigned out-of-the-box dashboards now leverage aggregate table cubes.
- New tables and an Admin Setting Change History out-of-the-box dashboard to were added to the Platform Analytics Warehouse to empower administrators to monitor and audit configuration changes.

Strategy Managed Cloud Standard

Use Workstation to restart the Library server for your Managed Cloud Standard environments.

Strategy for Office

Excel

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- Use easy selection to easily select visualizations to import.
- Refresh and reprompts in the add-in panel were updated for clarity including updated tooltips, filters, and options menu.
- Use the migration assistant to migrate your legacy Office add-in prompted reports to the modern Strategy Excel add-in.
- Import live connect datasets and Mosaic models.

PowerPoint

- Use easy selection to easily select visualizations to import.
- Refresh and reprompts in the add-in panel were updated for clarity including updated tooltips, filters, and options menu.

Strategy for Google Sheets™

Import live connect datasets.

Intelligence Server

- Cube governing is enabled by default.
- The Unload cube caches not used for (minutes) setting default value was updated to 10080 minutes for Strategy Cloud environments.

Strategy Packages for Python (mstrio-py)

Minor changes

- Added `is_run_in_workstation` method to `Connection` class to check if the script is run in Workstation context.
- Added prevention logic to `get_connection` method disallowing accidental connection closing.
- Added `model_list_vldb_settings` method to `Report`.

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- Added possibility to alter `owner` field with `Object` class `alter()` method.
- Added possibility to set application name as Library title of `Application` object.
- Added `data_source_script_all_users.py` and `transaction_edit_users.py` script templates.
- Improved error message for server not supporting new Python Application Type during login.
- Added support for object subtypes corresponding to Bots 2.0, Universal Bots and Datamart Reports.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability, support new functionality, and fix functionality and performance issues for the following drivers:

  - DB2 ODBC and JDBC drivers
  - SQL Server ODBC and JDBC drivers
  - SAP Hana ODBC and JDBC drivers
  - Exasol ODBC and JDBC drivers
- Import XML format data from AWS S3, Azure Data Lake Storage Gen2, and Google Cloud Storage.
- Added additional push down functions for Snowflake to improve performance.

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Strategy Web

90% of the Intelligence server's available memory is applied as the default memory governing limit for subscription jobs in Subscription Job Governing.

Strategy One (July 2025)

Strategy Library

Mosaic

- Use vault connections when adding a new data source while creating a new Mosaic model.
- Universal Semantic Layer was updated to normalize English-based table and column names during SQL generation.

Strategy AI

- The Ask About panel displays the bot's content, listing the available columns and their descriptions (if available). You can start a conversation about any of the columns.

Dashboards

- The default execution mode for dashboards is now load pages on demand, rather than load all chapters and pages. This decreases the initial load time. You can change the mode in the Dashboard Properties Dialog.
- When viewing a dashboard:
  - The Add to Library banner is now an icon in the toolbar to increase the layout area.
  - The Add/Remove Favorite icon has moved from the Contents panel to the toolbar for quicker access.

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- The dashboard Save icon is now a drop-down menu.
  - To save the dashboard and continue editing, click **Save** and select **Save**.
  - To save the dashboard, exit editing, and view the dashboard, click **Save** and select **Save and Open**.
- For sankey diagrams, you can group values based on relative thresholds, such as top N items or the bottom X% of values. define dynamic minor values groups based on rank and percentage. This increased customization offers enhanced insight into your data's distribution and trends. The dynamic groups reduce visual noise and ensure that the sankey diagram remains clear and focused, no matter how its data changes. For steps, see Format Panel for Sankey Diagram Visualizations.
- You can adjust the padding around a panel stack container or information window container. For steps to create a panel stack, see Add Panel Stacks to Dashboards. For steps to create an information window, see Add Information Windows.
- For classic grid parity, the modern grid Format panel **Merge repetitive cells** setting replaces the **Arrangement** setting.
- For visualizations that target other visualizations to filter or highlight data, you can define whether each target is filtered or highlighted. This means that when you click the source, one target can display only the selected data while another target continues to display all the data, with the selected data highlighted. This provides more flexibility for your design, improving the storytelling flow and analytical depth of your dashboards. For steps, see Use a Visualization to Filter or Highlight Data in Another Visualization.
- You can export or subscribe a dashboard to CSV files with a user-defined separator. Each visualization is exported as an individual CSV file using the user-defined separator. For steps, see Share a Dashboard.

Dashboards and Reports

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You can send dashboard or report execution to the background so that you can perform other operations in Library. Running in the background creates a snapshot. For more information, including how to create and access snapshots, see Send Dashboard Execution to the Background and Create a Snapshot.

Administration

The Library Home page is enhanced so that it's quicker to find the content you need.

- On the sidebar, **Recents** and **Favorites** provide quick access to recently-viewed content and favorited objects.
- On the sidebar, **Snapshots** displays dashboards and reports that were executed in the background, as well as snapshots created for dashboard subscriptions, document subscriptions, and report subscriptions.
- On the sidebar, **Content Discovery** is now called **Browse Folders**.
- The improved search experience helps you find content more efficiently.

Strategy Workstation

Administration

- User comments were added to the Save dialog in the following objects:
  - MTDI cube datasets
  - MTDI reports
  - Applications
  - Users and user groups
- User comments were added to the Delete objects dialog.
- Use secret vaults when creating database logins during data import.

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- You can add an alias for display purposes to a fact. For steps to create a fact, see Creating and Editing Facts.
- View schedules in subscription properties.
- Set multiple schedules in one email, FTP, file, OneDrive, and SharePoint subscription.
- Create schedules in the subscription editor. For more information on creating subscriptions and schedules, see the topics under Manage Subscriptions.
- Enable the following application components:
  - **Favorites**. Users can add their most frequently used dashboards, documents, reports, and bots as Favorites to allow quick access to the objects.
  - **Recents**. Recently-visited dashboards, documents, reports, and bots display in the Recents section, providing quick access without explicitly adding them to Library or marking them as Favorites. It displays the 50 most recently-viewed items.
  - **Snapshots**. Snapshots include those created for dashboard, document, and report subscriptions, as well as those executed in the background when dashboard or report execution takes too long in Library.
- Import search object results and dependencies to migration packages.
- The job level governing setting was updated to consider the lower value between available memory, total machine memory, or total container memory.
- User group governing settings updates:
  - Maximum memory consumption per job was updated to consider the lower value between available memory, total machine memory, or total container memory.

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- The maximum memory consumption per cube publishing was updated to default to 90% of the Intelligence server's available memory.

Dashboards

- The default execution mode for dashboards is now load pages on demand, rather than load all chapters and pages. This decreases the initial load time. You can change the mode in the Dashboard Properties Dialog.
- For sankey diagrams, you can group values based on relative thresholds, such as top N items or the bottom X% of values. define dynamic minor values groups based on rank and percentage. This increased customization offers enhanced insight into your data's distribution and trends. The dynamic groups reduce visual noise and ensure that the sankey diagram remains clear and focused, no matter how its data changes. For steps, see Format Panel for Sankey Diagram Visualizations.
- You can adjust the padding around a panel stack container or information window container. For steps to create a panel stack, see Add Panel Stacks to Dashboards. For steps to create an information window, see Add Information Windows.
- For classic grid parity, the modern grid Format panel **Merge repetitive cells** setting replaces the **Arrangement** setting .

Dashboards and Reports

- Slider input controls for transactions in grids is supported when the corresponding column has a metric or number value.

Strategy Managed Cloud Environment

Dynamically adjust service pod memory limits in the Managed Cloud Environment (MCE) portal.

Strategy for Office

Excel

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- Select multiple visualizations to import.
- Use the migration assistant to migrate your legacy Office add-in non-prompted reports to the modern Strategy Excel add-in.

Strategy for Google Sheets™

Import Mosaic models into Google Sheets.

Strategy Packages for Python (mstrio-py)

New features

- Added `duplicate` method to `Project` class that allows duplicating projects on the same environment.
- Added `ProjectDuplication`, `ProjectDuplicationStatus`, `DuplicationConfig`, `ProjectInfo classes` and `list_projects_duplications` function in mstrio.server.project to support project duplication process.
- Added `LibraryShortcut` class and `list_library_shortcuts` method in `Library` class to manage items as published to the user's Library.
- Added `get_library_shortcut` method in `Document`, `Dashboard`, and `Bot` to manage published items.

Minor changes

- Added Library-related methods to `Bot` class.
- Added code snippet `logging.py` to show how to add custom logging inside custom scripts.
- Updated `publish()` to use User Groups as a whole instead of each user separately.
- Updated `unpublish()` to enable unpublishing for User Groups.

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Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Certified gateway versions
  - Yellowbrick 7.x
  - ClickHouse
- Out-of-the-box driver updates

  Ensure security and reliability by other security updates and fixing bugs for the following drivers:
  - Snowflake ODBC and JDBC driver
  - ServiceNow ODBC driver
  - Shopify ODBC driver
  - Square ODBC driver
  - Paypal ODBC driver
  - Marketo ODBC driver
  - Hubspot ODBC driver
  - Eloqua ODBC driver
  - Concur ODBC driver
- Use key pair authentication to connect to Snowflake using Google Secret Manager, HashiCorp Cloud, and HashiCorp Vault.
- Create multiple Jira data sources and import data from Jira Cloud using the Cloud Object Connector service. See Create Multiple Jira Data Sources Using the Cloud Object Connector.

Strategy Web

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- The default execution mode for dashboards is now load pages on demand, rather than load all chapters and pages. This decreases the initial load time. You can change the mode in the Dashboard Properties Dialog.
- For sankey diagrams, you can group values based on relative thresholds, such as top N items or the bottom X% of values. define dynamic minor values groups based on rank and percentage. This increased customization offers enhanced insight into your data's distribution and trends. The dynamic groups reduce visual noise and ensure that the sankey diagram remains clear and focused, no matter how its data changes. For steps, see Format Panel for Sankey Diagram Visualizations.
- You can adjust the padding around a panel stack container or information window container. For steps to create a panel stack, see Add Panel Stacks to Dashboards. For steps to create an information window, see Add Information Windows.

Strategy One (June 2025)

The June 2025 release includes the following updates in addition to the previously released cloud May 2025 and April 2025 updates for on-premises customers.

Strategy Library

Mosaic

- This release introduces Mosaic, an AI based modeling tool, that streamlines data preparation, modeling, data connection, and enrichment.
  - Use Mosaic Studio to create Mosaic models using automation to clean up your data and address a variety of challenges including data inconsistency and skill gaps.

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- Use Universal Semantic Layer for a consistent and trusted method to access diverse enterprise data sources without moving your data. Use the unified layer for flexible data access to a variety of sources including Tableau and JDBC drivers.

Strategy AI

- The Strategy AI Auto 2.0 APIs enable seamless functionality for bots across various platforms and integrations. These APIs provide core capabilities such as user authentication, data retrieval, bot interaction management, and system notifications. They support graphs and visualizations, including exporting visualizations as images, ensuring consistent experiences across mobile, web, and third-party applications like Microsoft Teams.
- You can use unstructured data as datasets when you create bots and AI dataset collections.
  - Unstructured data includes PDF, Microsoft Word, HTML, markdown, and text files.
- Bots can display customized visualizations, rather than questions, that serve as prompts for your analysis. You can quickly view the important information in these prompts or click the visualization to explore more details.
- Customize how bar and line charts display in bots by setting the Y-axis origin and whether data labels display.
- You can enable auto complete to display a list of matching column names as a user types. Using auto complete helps with accuracy because the exact object needed is selected. It helps avoid ambiguity and incorrect responses, especially when multiple objects share a similar name.
- Specify the types of questions that should be rejected at the bot level, that is, that the bot does not answer.

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- Simplify your information queries with the universal bot, which aggregates responses from multiple specialized bots such as Sales, Finance, and HR. Ask a single question, and the universal bot intelligently identifies the relevant bots, gathers their insights, and delivers a cohesive, accurate answer in seconds. Whether you need cross-departmental insights, streamlined employee assistance, or executive summaries, the universal bot consolidates responses into one unified experience.
- You can view the SQL query used to answer the question. Interpretations, including the SQL, are available even when an answer is not returned. This helps you troubleshoot the issue.
- Responses now stream in real time, appearing word-by-word as they are generated similar to a conversation in ChatGPT. This reduces perceived wait time and creates a more conversational, engaging experience for users.
- A new history and clarifier agent detects ambiguous or unsupported questions. Based on available data and past queries, it suggests likely alternatives to help users refine their intent. This improves accuracy, prevents confusion, and enhances trust in the responses.
- Bots can display combo (dual axes) charts in its answers.

Dashboards and Reports

- Improved subtotal performance for metrics that use non-additive functions (for example, Count(distinct)) so that they aggregate correctly in report subtotals.
- You can drill from a modern grid in a dashboard. Drill to view data at levels other than those that appear in the original display. For steps, see Drill In and Out of a Grid.
- You can select the default settings for exporting a dashboard to Excel. Customizing export settings saves end users from redundant clicks by

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allowing dashboards to inherit different default export settings. Users can override the defaults when they export the dashboard. For steps, see Dashboard Properties Dialog.

- When you export a dashboard to PDF, you can customize the header and footer with text, dynamic text (such as dashboard name), and images. You can also lock the header and footer independently so that end users cannot remove or change the footer when they export. For steps, see Dashboard Properties Dialog.
- You can create an object parameter to give users the ability to select from a list of attributes or metrics to dynamically update visualizations in a dashboard.
- Added support for hierarchical attributes in modern grids when you connect to multidimensional databases.

Administration

An updated Subscription Editor includes the ability to:

- View, monitor, and edit all subscriptions in Library, including those created in Web.
- Edit multiple content subscriptions that were created in Workstation before Strategy One (May 2025) without rich content or an Excel template.
- You can add a user, user group, contact, and email address to the recipient.
- Determine whether links to update the subscription and to unsubscribe are included in the subscription email.
- Access advanced settings to compress the content into a zip file and set an expiration time for the subscription.

StrategyWorkstation

Mosaic

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Schedule a Mosaic model refresh.

Strategy AI

You can use unstructured data as datasets when you create bots and AI dataset collections. You add the unstructured data in Workstation.

Dashboards and Reports

- Improved subtotal performance for metrics that use non-additive functions (for example, Count(distinct)) so that they aggregate correctly in report subtotals.
- You can drill from a modern grid in a dashboard. Drill to view data at levels other than those that appear in the original display. For steps, see Drill In and Out of a Grid.
- You can select the default settings for exporting a dashboard to Excel. Customizing export settings saves end users from redundant clicks by allowing dashboards to inherit different default export settings. Users can override the defaults when they export the dashboard. For steps, see Dashboard Properties Dialog.
- When you export a dashboard to PDF, you can customize the header and footer with text, dynamic text (such as dashboard name), and images. You can also lock the header and footer independently so that end users cannot remove or change them when they export. For steps, see Dashboard Properties Dialog.
- Added support for hierarchical attributes in modern grids when you connect to multidimensional databases.

Metrics

The Metric Editor in Workstation has been updated to improve usability, functionality, and performance. It now includes creating base formulas and adding levels, conditions, and transformations to all layers of nested metrics, functions available in MicroStrategy Developer.

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- A base formula is a metric calculation that you use in multiple metric definitions. By reusing the same base formula in various metrics, you save time and simplify maintenance. For an example and steps to create and use base formulas, see Create a Base Formula to Use in Multiple Metrics.
- A nested metric contains multiple layers of functions. They are sometimes referred to as nested aggregation metrics, because their formulas contain one aggregation function enclosed inside another. For an example and steps to create a nested metric, see Create a Nested Metric.
- For steps to create metrics with the new Metric Editor, see Create a Stand-Alone Metric.

Administration

- Bursting from a Email Subscription is available for dashboards. This feature enables administrators to send a dashboard to a dynamic list of recipients with the data sliced by the user's email.
- For an application, you can determine whether links to update the subscription and unsubscribe are included in the subscription email. By default, the links are enabled. For steps to disable them and a more detailed description, see Remove the Links to Update Subscription and Unsubscribe.
- You can select an application's font, including a custom font. You need to customize and deploy the font plug-in before the custom font is available. For steps to choose or customize a font, see Modify the Library Logo and Color Theme.
- You can manage and edit all subscriptions in Workstation, including those created in Library. For steps to manage subscriptions, see Manage Subscriptions.
    - In addition to the Run, Unsubscribe, and Delete context menu options previously available for Library subscriptions, you can now edit, change

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ownership, duplicate, rename, save as, unsubscribe, and view properties.

  - The Type column allows you to easily distinguish between Workstation and Library subscriptions.
  - Library subscriptions include Bookmark and Range options.

- Purge caches using the object right-click menu, such as a report.
- The Project List dialog was updated to include a selected project count and warning when more than one project is selected.
- The Objects page was updated to include a project selection prompt if your environment has more than one project selected.
- View content cache status.
- A new 2025 data engine version was added. For more information on updating your data engine version, see View and Edit Basic Project-Level Properties.

Strategy Cloud Platform

- This release introduces Managed Cloud Standard (MCS). MCS is Strategy's latest cloud offering, designed to deliver powerful analytics to smaller teams in a cost-effective, agile, and simplified way. For more information, contact your Strategy account team.
- Rolling upgrade support for containerized cloud environments.

Strategy Library Mobile

Android

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- Support for OS 16 and SDK 16.
- You can drill from a modern grid. Drill to view data at levels other than those that appear in the original display.

Strategy Mobile

Android

- Support for OS 16 and SDK 16.
- You can drill from a modern grid. Drill to view data at levels other than those that appear in the original display.

Strategy for Office

Excel

Dynamically select groups when you import documents.

PowerPoint

- Improved image quality (pixel density) of imported images.
- Unified image import behavior on Windows and Mac.

Teams

Use a custom identifier when authenticating Teams for SSO login.

Strategy for Google Sheets™

This release introduces Strategy for Google Sheets™ which allows users to connect to Strategy's semantic layer and import governed content from dashboards, reports, datasets, and cubes.

Updates for this add-in will align closely with Strategy release cycles. The exact release dates vary due to Google's Workspace publishing process.

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Platform Analytics

- The Subscription Analysis dashboard was updated to track multi-content subscriptions created in Workstation and Library. The dashboard also includes the following updates:
  - The **Object** and **Object Type** columns were renamed to **Content** and **Content Type**.
  - The **Content** column was updated to include **Multiple Objects** and the **Content Type** column was updated to display multiple types.
  - A new **Content** filter was added.
  - A new **Content Details** grid was added.
- The **Client Telemetry** dashboard was updated to track the number of pages visited through dashboard links and contextual linking.

Strategy Visualization SDK

Added support for shared external resource files in custom visualizations on iOS. For more information, see KB439757.

Strategy Packages for Python (mstrio-py)

Setup

Connections completed through the `Connection` class are identified by their own application type 76 "DssXmlApplicationPython".

Minor Changes

- Added `working_set` and `max_search` optional parameters when creating `Connection` objects.

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- Added `get_api_token` method to `User` class to allow administrators to create API Tokens for users.
- Added filtering arguments in `list_shortcuts`.
- Added `invalidate` and bulk `invalidate_caches` methods for content cache management.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- You can establish a connection to a web service using a Python query, replacing the need for XQuery. For steps, see Import Data From Python Query Data Source.
- Out-of-the-box driver updates

  Ensure security and reliability by other security updates, support new functionality, and fix functionality and performance issues for the following drivers:

  - Driver Manager Files
  - Presto JDBC driver
- Certified gateway version
  - MySQL 9.3
- Improved push down functions for Spark 3.x.
- Use key pair authentication to connect to Snowflake.

Strategy One (May 2025)

Strategy Library

Strategy AI

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- Create derived attributes in AI dataset collections. Derived attributes are new attributes based on existing objects and present your data in different ways.
- Create a new chat without clearing the bot's conversation history. The history is not used as context for the questions in the new chat but remains saved so you can continue to use it.
- The bot's chat history now displays in a structured Chats panel on the left side of the bot interface, allowing you to better manage and navigate your conversations. Chats are grouped into separate conversations organized by date.
- A new caching mechanism on the chat engine answers questions much faster by reducing the number of calls to the LLM.

Dashboards

- Dashboards have a new theme which utilizes the new Strategy color palette to align with our updated branding. The Strategy theme ensures a cohesive and modern look that reflects our strategic vision. It also enhances visual consistency across platforms. For steps to apply a dashboard theme, see Reusable Dashboard Themes.
- You can hide columns of a modern grid while viewing the dashboard in Library. This applies only to that user's view of the dashboard.
- You can set the defaults for the exported PDF's page margins, independent from the paper size, for a dashboard. Set the margin spacing for the left, top, right, and bottom margins separately. End users can adjust the page margins when they export the dashboard to PDF. This feature provides greater control over your dashboard layout, so you can precisely tailor your dashboards to client or regulatory standards. Customizing the margins results in a more predictable PDF export. For steps to set the default, see Dashboard Properties Dialog. For steps to export a dashboard, see Share a Dashboard.

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- You can export a dashboard to comma-separated value (CSV) files. Each visualization is exported as an individual CSV file; all the CSV files are downloaded together in a zip file. For steps, see Share a Dashboard.
- You can subscribe to dashboard content in CSV format.
- You can dynamically filter a Transaction element drop-down list using a visualization.

Documents and Reports

- Create, edit, and delete bookmarks in documents and reports.
- Subscribe to snapshots to share document or report hyperlinks for a point in time with defined users and user groups.

Strategy Workstation

Dashboards

- Dashboards have a new theme which utilizes the new Strategy color palette to align with our updated branding. The Strategy theme ensures a cohesive and modern look that reflects our strategic vision. It also enhances visual consistency across platforms. For steps to apply a dashboard theme, as well as create your own, see Define Reusable Dashboard Themes.

Administration

- You can enable and disable downloading dashboards to CSV files for an application. For steps, see Create an Application.
- You can view and edit the levels, filter conditions, and transformations of nested metrics. This makes it easy to build, understand, and update these complex metrics efficiently and quickly. A nested metric contains multiple layers of functions, such as `Avg(Sum(Revenue))`, which first adds all the Revenue fact values and then averages them.

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- Copy and paste multiple objects and folders using the right-click menu or keyboard shortcuts.
- Configure OAuth 2.0 to log in to Library. Use this option to simplify authentication and enhance security and scalability.
- Added drag-and-drop to the Tree view and in independent browsing in the Navigation pane. You can drag-and-drop multiple objects between the Navigation and main panes and expand subfolders using on-hover while dragging an item. Additionally, all actions consider a user's Access Control List (ACL) and permissions.
- Create an Excel template for subscriptions.
- The project-level setting, **Remove non-executable objects on dashboard execution**, was added to choose whether non-executable objects on dashboard execution should be removed from the view.
- When creating and editing transformations, you can access a VLDB property to specify how transformation dates are calculated when there are multiple attributes to transform. For steps, see Create Transformations.

Strategy Library Mobile

- Create, edit, and delete bookmarks in documents and reports.
- Subscribe to snapshots to share document and report hyperlinks for a point in time with defined users and user groups.
- Added fixed page size (resolution) support when viewing dashboards on the Library app for iPad.

Intelligence Server

Network proxy support for cloud object connectors such as S3, Sharepoint, and OneDrive.

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Strategy for Office

Excel

- Preserve table formatting by using import settings to update an existing table rather than replace it.
- Importing cross-tab reports into Excel as pivot tables generates meaningful, descriptive field names by combining column headers.

PowerPoint

Images imported into PowerPoint have higher resolution.

MicroStrategy Packages for Python (mstrio-py)

New Features

- `License` class refined with methods to support `compliance_check` and `audit`.
- Added `UserLicense` and `PrivilegeInfo` data classes in the `license` module.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability by other security updates and fixing bugs for the following drivers:

  - Concur ODBC driver
  - Eloqua ODBC driver

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  - Google BigQuery JDBC driver
  - HubSpot ODBC driver
  - Marketo ODBC driver
  - Native SQL Server JDBC driver
  - PayPal ODBC driver
  - ServiceNow ODBC driver
  - Shopify ODBC driver
  - Square ODBC driver
  - Teradata ODBC and JDBC drivers
- Certified gateway version
  - IBM Db2 for i 7.5

Strategy Modeling Service

- The `application.con` file has been renamed to `application.properties`.
- Properties in the `application.properties` file have been updated. See Modeling Service Configuration Properties for details.

Strategy One (April 2025)

Library

Strategy AI

Interact with bots in private messages, group chats, and channels in Microsoft Teams.

Dashboards and Reports

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- Information windows with live connect datasets in dashboards are no longer queried until you open the information window.
- Add a personal filter to any dashboard chapter, even if it does not already contain a filter.
- Undo and redo actions as you create and edit a report and when viewing a report. For example, you can remove an object that you added to the report, undo a change to the number format, or undo a page-by selection.
- A **No Data Returned** setting was added to dashboard properties that allows you to customize the message that displays when a visualization renders with no data.

Administration

Subscription manager updates:

- Drag column headers to resize columns.
- Filter subscriptions in the top navigation.
- Click a column header to sort subscription information.

Workstation

Dashboards and Reports

- Undo and redo actions as you create and edit a report. For example, you can remove an object that you added to the report, undo a change to the number format, or undo a page-by selection.
- A **No Data Returned** setting was added to dashboard properties that allows you to customize the message that displays when a visualization renders with no data.

Administration

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- Use object settings to view system managed objects in Global Search, components and dependents of reports and dashboards, and search objects.
- The project-level setting, **Permissive object handling for users without execute access**, was updated to support permissive behavior for non-executable objects in grids, visualizations, selectors, filters, text boxes, images, shapes, and HTML containers. Therefore, if a user has partial execute access to objects, rather than the entire dashboard failing, the user can view those objects they have execute access for in dashboards and reports in Library.
- Apply optional advanced SAML single sign-on settings including single log out, enable relay state as the login redirect URL, and map attributes as system prompts.

Strategy Library Mobile

Add new personal filters in Library Mobile, for both iOS and Android.

MicroStrategy Packages for Python (mstrio-py)

Minor Changes

- Added support for logging in with API Token to the`Connection` class.
- Added the `application_id` argument to the `Connection` class to allow logging in using custom applications.
- Added the `contact_address` argument to the `User.add_address` method to allow passing the `ContactAddress` object.
- Added the `create_shortcut` method to all objects inherited from `Entity`.

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- Added the `list_shortcuts` function in `mstrio.object_management.shortcut`.
- Added the `alter` method to the `Shortcut` class.
- Added `what_can_i_do_with` helper method to mstrio root folder to help create scripts.
- Added the `License` class in the `mstrio.server.license` subpackage to allow management of `License`.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability by other security updates and fixing bugs for the following drivers:

  - SQL Server ODBC
  - SQL Server JDBC
  - Spark JDBC
- Certified gateway version
  - MongoDB Atlas version 1.4

Strategy One (March 2025)

Strategy Library

Strategy AI

This release introduces Auto 2.0, our latest enhancement in AI-driven analytics. Auto 2.0 has been developed based on an agentic AI architecture

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This release introduces Auto 2.0, our latest enhancement in AI-driven analytics. Auto 2.0 has been developed based on an agentic AI architecture with multiple agents to automate different business functions. This allows us to work with customers to identify high-value business scenarios and build tailored solutions that unlock business value.

- Agentic Architecture to enable custom business scenarios - Leverage specialized AI agents working together to deliver precisely targeted business outcomes.
- Improved conversational capabilities - Experience more natural, context-aware interactions that better understand your business questions.
- Insight generation in answers - Uncover actionable intelligence beyond raw data with AI that identifies patterns and opportunities others miss.
- Export - Share discoveries instantly across your organization with one-click exports to Excel and CSV formats.
- Interactive visualizations - Explore data visually through responsive charts and graphs that bring your business questions to life.
- AI Data Collection allows to create collections of data for AI scenarios - Curate and organize relevant information automatically for targeted business use cases.
- Support for multi-table MTDI cubes - Administrators can enable multi-table MTDI cubes for Auto 2.0 to help you discover greater insights.

Dashboards

- *Preview Feature*: Enable object parameters to personalize your dashboard views by easily selecting attributes or metrics.
- Subscribe to snapshots to share dashboard hyperlinks for a point in time with defined users and user groups.

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  - To view a dashboard snapshot, click Additional Information in the grid or list view on the Library Home Page.

- Add user groups as email subscription recipients.
- Add attribute filters to the Filter Data panel while you are viewing a dashboard in Library, not only while editing it. These personal filters allow you to create customized data views and focus on specific sets of data without needing help from a dashboard author.
  - When personal filters are enabled for a dashboard, the Add Filters icon displays in the Filter Data panel's toolbar. Enable the feature in the Dashboard Properties Dialog. For steps to create a personal filter, see Add a Filter While Viewing a Dashboard.
  - Personal filters are available for filtering in Library Mobile; you cannot add personal filters in Library Mobile.
- Cloud Reporter and AI Consumer users (not only Power Users) can save a personal copy of a dashboard, document, or report while viewing it in Library. Duplicating it saves a personal copy in your My Reports folder. Any manipulations you made to the dashboard, document, or report, such as sorting, filtering, and answering prompts are saved with the personal copy.
- You can select which users can view which chapter of a dashboard. This allows multiple users with different access levels to use the same dashboard but only view the information that they are authorized to. This improves the reusability of dashboards, shortens dashboard development time, and ensures sensitive data is protected.
- You can provide alternative text for images added to dashboards. You can also add alternative text for images that replace values in thresholds in reports and dashboards. For image-based quick thresholds, alternative text is automatically produced, such as green regular push pin or red down arrow. The description is used by screen readers or other assistive

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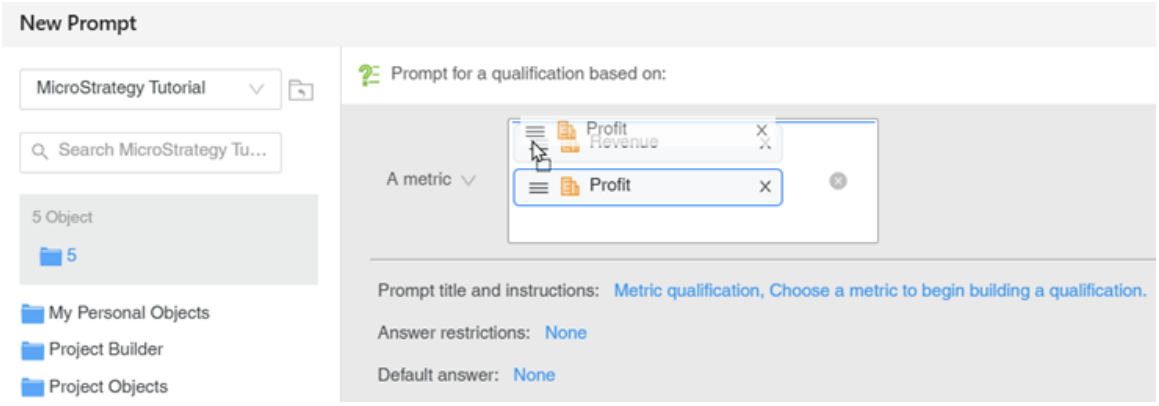
technology, improving the dashboard's accessibility.

- You can format individual columns in modern grids in dashboards to customize font color and fill for each column. This more granular formatting allows you to highlight columns or headers with specific colors, improving usability and readability. Employ this enhancement in transaction-enabled grids to highlight editable columns or headers.
- If you add a column to a grid to adjust aggregation, joins, thresholds, or sorting, you may not want end users to view the actual values or elements. In a modern grid, you can hide a column from display. The metric or attribute still displays in the Editor panel, but not on the grid when editing or viewing the dashboard. To hide the column, right-click the column header and select **Hide Column**. To redisplay it, click the menu icon for the grid and select **Show Hidden Columns**. (You show and hide columns while editing the dashboard, not while viewing.)
- You can create threshold-based alerts for dashboards in Library. This means notifications are sent when a metric value on the dashboard meets the threshold conditions. Users stay informed about critical changes and events, promoting proactive decision-making and operational efficiency. For steps, see Create an Alert Subscription for a Dashboard.

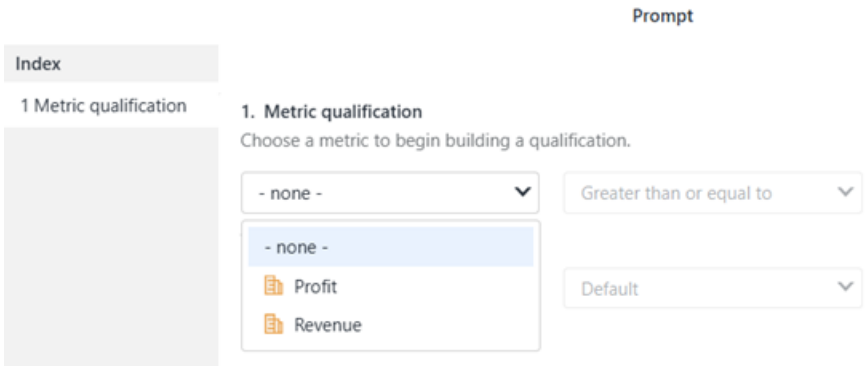
Reports

- Within a report, you can create a metric qualification prompt that allows users to select from multiple metrics. Now you can drag and drop metrics to change the order that they display to users in the prompt. In the example shown below, the Revenue and Profit metrics were added to the metric qualification in that order, but the report creator wants to display Profit first. They drag and drop Profit above Revenue.

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When the report is executed and the prompt displays, Profit displays first in the drop-down list.



- In the Report Filters summary shown during consumption in Library, prompt answers rather than a definition display for additional levels in the filters. This applies to highly-prompted reports, such as those with prompts inside of prompts. The summary allows both object and element prompt selections to be viewed, enhancing the user experience and smoothing the transition from Web to Library.

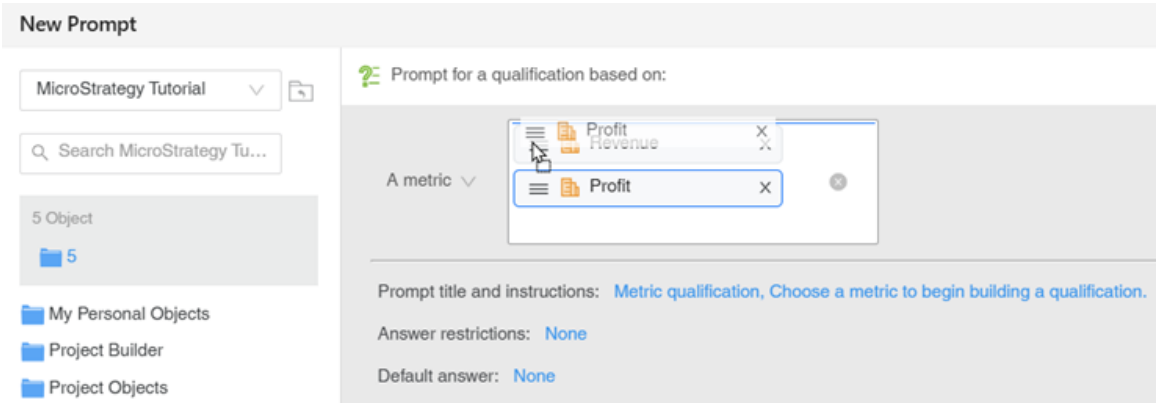
StrategyWorkstation

Administration

- Toggle on **Subscribe** and **Subscribe to Snapshot** application components to enable subscribe options in dashboards and reports.

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- User comments were added to the Save dialog in the following objects:
  - Attributes
  - Content groups
  - OLAP cube datasets
  - Security filters
  - Security roles
- Create a metric qualification prompt that allows users to select from multiple metrics. Now you can drag and drop metrics to change the order that they display to users in the prompt. In the example shown below, the Revenue and Profit metrics were added to the metric qualification in that order, but the prompt creator wants to display Profit first. They drag and drop Profit above Revenue. This also applies to prompts created within reports.



- Use cognitive search, a centralized search service, that adds support when users search using synonyms, typos, abbreviations, natural language, and multilingual search queries in all Strategy Cloud Environment offerings.
- Subscription enhancements:

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  - A new **Address Name** column and filter.
  - Renamed the **Active** column to **Status**.
  - Hover over the element in the **Content**, **Recipients**, and **Address Name** columns to display their values.
  - In the Subscription Editor, the object ID and path display in the **Content** pane.
  - The **Save** button activates correctly in the Subscription Editor.
  - Added an object specific right-click menu in **Content** and **Recipient** of the Subscription Properties.
  - The right-click menu was updated to change icons and add **Duplicate** and **Rename** options.

- Configure the default settings for report export for your applications. Applying the most-used settings for Excel and PDF export reduces keystrokes and time for your users, although users can change the settings when they export. It can also ensure that details such as user, timestamp, and filter details are automatically and easily exported, without users having to select the export options each time. For more information, see Configure the Default Report Export Settings.
- Rename, edit, create, and unmap objects and map elements from the edit tables dialog.
- Create Azure Key Vault, Google Secret Manager, and HashiCorp Cloud Platform Vault Secrets (Non-Dedicated) vault connections.
- Use the server-level setting, **Allow users to be created without an email address**, to create or edit users without including a user email address. The setting is disabled by default.

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- Create OneDrive and SharePoint subscriptions to automatically deliver Strategy content to OneDrive and SharePoint based on time or events.
  - Create OneDrive and SharePoint delivery devices.
  - Enable email notifications for OneDrive and SharePoint delivery.
- Project Properties updates:
  - Add a project alias. If your project name differs between Library and your metadata, use a project alias to correlate the project names.
  - Change the project owner.
- Add user groups as email subscription recipients.
- Create planned tasks, which schedule the execution of Python scripts. For steps, see Create Planned Tasks.
- Caches updates:
  - A new minimize/maximize icon to minimize and expand Cubes and Content charts.
  - New **Security Filter ID**, **Database Login**, and **Database Connection** columns.
  - New **Total Data Fetching and Processing Time** and **Data Transfer Time** summaries for cubes.
- Jobs updates:
  - New **Content** and **Username** columns and filters.
  - Updated **Status** values.
  - New **Total Jobs** chart that displays the number of jobs per status.
  - A new minimize/maximize icon to minimize and expand charts.

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  - Replaced **Group By** with **Arrange By**.
  - Improved SQL readability.
- Columns in the **User Group** editor were renamed to match the column names in the **User Groups** landing page.
- Security roles updates:
  - New **Owner**, **Date Modified**, and **ID** columns and filters.
  - Renamed the **Security Role** column to **Name**.
  - Updated right-click menu options including a new **Edit Privileges** and **Properties** option.
- Enterprise security updates:
  - Renamed the **Display Name** column to **Name**.
  - Updated **Date Modified** and **Date Created** filter options.
  - Added **Name** to the filter panel.
- Create a Adobe Analysis Workspace data source. Adobe has discontinued Adobe Analytics, replacing it with Adobe Analysis Workspace.
- Added a **View Dependent Subscriptions** option to the **Triggers** right-click menu.
- OLAP cube right-click menu updates:
  - Added **Show in Folder** option.
  - Added **New** > **Subscription from** and **Shortcut for** options.
  - Added **View** > **SQL Query** option.
  - Renamed **Copy To** to **Duplicate**.
- Added a **Rename** option to the **History List** right-click menu.
- Added a **Duplicate** option to the **Content Groups** right-click menu.

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- An **Export** option was added to the following pages:
  - Monitors > Clustering
  - Monitors > Runtime
  - Users & Groups > User Groups
  - Scripts
  - Migrations
  - Components
  - Dependents
  - Internationalization
- Renamed **Copy To** to **Duplicate** in the **Dashboards**, **Documents**, and **Card** right-click menus.
- Reports right-click menu updates:
  - Renamed **Copy To** to **Duplicate**.
  - Added **Show in Folder** and **Add to History List** options.
- Renamed **Copy To** to **Duplicate** and added a **Show in Folder** option in the **Attribute** and **Fact** right-click menus.
- Added a new **Duplicate** option in the **Content Groups** right-click menu.

Dashboards

- *Preview Feature*: Enable object parameters to personalize your dashboard views by easily selecting attributes or metrics.
- Dashboard subscriptions only execute the specified page range instead of the entire dashboard to improve performance and resource efficiency.
- You can provide alternative text for images added to dashboards. You can also add alternative text for images that replace values in thresholds in

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reports and dashboards. For image-based quick thresholds, alternative text is automatically produced, such as green regular push pin or red down arrow. The description is used by screen readers or other assistive technology, improving the dashboard's accessibility.

- You can select which users can view which chapter of a dashboard. This allows multiple users with different access levels to use the same dashboard but only view the information that they are authorized to. This improves the reusability of dashboards, shortens dashboard development time, and ensures sensitive data is protected.
- You can format individual columns in modern grids in dashboards to customize font color and fill for each column. This more granular formatting allows you to highlight columns or headers with specific colors, improving usability and readability. Employ this enhancement in transaction-enabled grids to highlight editable columns or headers.
- If you add a column to a grid to adjust aggregation, joins, thresholds, or sorting, you may not want end users to view the actual values or elements. In a modern grid, you can hide a column from display. The metric or attribute still displays in the Editor panel, but not on the grid when editing or viewing the dashboard. To hide the column, right-click the column header and select **Hide Column**. To redisplay it, click the menu icon  for the grid and select **Show Hidden Columns**. (You show and hide columns while editing the dashboard, not while viewing.)

MicroStrategy Packages for Python (mstrio-py)

New Features

Added `list_timezones` method and TimeZone class in `mstrio.server.timezone` to allow management of Time Zone internationalization objects.

Minor Changes

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- Allowed to provide a string as a qualification when using the create and alter methods of the `Filter` and `SecurityFilter` classes.
- Added alias argument to alter method to `Project` class to allow setting project alias.
- Added `create_profile_folder` method to `User` class to allow creating profile folders.
- Added `username`, `user_id`, and `object_name` properties to `Job` class.
- Added `create_copy` methods to `Subscription`, `Schedule`, `Transformation Event`.
- Updated `alter` method in a number of classes to allow changing ownership of their corresponding objects.

Removed

Removed the `Dossier` class as it is deprecated. From now on, you can use the `Dashboard` class instead.

Strategy Cloud Platform

Upgraded to Kubernetes version 1.31.

Strategy Library Mobile

Supports Intune native EMM SDK for Xcode 16.

iOS

Object descriptions display as tooltips in chapter filters in Library iOS. The tooltips provide necessary context and improve dashboard usability. Enable or disable it using the Dashboard Properties Dialog. For an example, see Filter panel.

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Strategy for Office

Excel

- Import select or full panel stacks into Excel as data or visualizations.
- Import documents as data including documents with multiple layouts and documents with groups.
- Refresh and delete group-by objects.
- Search and filter can be directly accessed in the add-in.

PowerPoint

- Import select or full panel stacks and nested panel stacks.
- Search and filter can be directly accessed in the add-in.

Strategy Platform Analytics

The Subscription Analysis dashboard was updated to include bursting subscription email telemetry data. You can now track the execution status for each recipient in a bursting subscription.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Out-of-the-box driver updates

  Ensure security and reliability by other security updates and fixing bugs for the following drivers:

  - Snowflake JDBC Driver
  - Oracle ODBC and JDBC Driver

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  - Redshift ODBC and JDBC Driver
  - Native PostgreSQL Windows ODBC Driver
  - Exasol ODBC and JDBC Driver
  - MongoDB ODBC Driver
- Certified gateway versions
  - SQL for Databricks
  - PostgreSQL 17
- Improve your Databricks performance using the UseNativeQuery JDBC option.
- Snowflake connector enhancements:
  - Use Microsoft Entra ID or Okta to configure your Snowflake OAuth parameters.
  - Connect to Snowflake using a JDBC or ODBC connection.
  - Added a new **OAuth Grant Type** field in the Snowflake connector editor. Use this field for OAuth authentication mode to use an ID token or client credential workflow.

Strategy One (February 2025)

Strategy Workstation

Improved load performance for user and user group management using smart, on-demand fetching.



To utilize all performance improvements, you must be on Library version February 2025 or later.

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Managed Cloud Platform

- Add support for AWS deployments in the following regions:
  - Africa (Cape Town)
  - Malaysia
  - Middle East (UAE) and (Bahrain)
  - Osaka
  - Seoul
- Add support for Azure deployments in the following regions:
  - Africa (Cape Town) - DR only
  - Middle East (UAE)
  - Osaka
  - Seoul
  - Spain Central (Madrid)
- Add support for GCP deployments in the following regions:
  - Hong Kong (asia-east2)
  - Indonesia
  - London (europe-west2)
  - Netherlands
  - Saudi Arabia
  - Seoul

Strategy Packages for Python (mstrio-py)

New Features

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- Added `list_calendars` method and `Calendar` class in `mstrio.server.calendar` to allow management of `Calendar` internationalization objects.
- Added `list_palettes` method and `Palette` class in `mstrio.project_objects.palettes` to allow management of Color Palette objects.
- Added `answer_prompts` method to `Report`, `Document`, and `Dashboard` classes to allow answering prompts.
- Added `list_related_subscriptions` method to `User`, `Dashboard`, `Report`, `Schedule`, and `Event` classes to allow listing related subscriptions.

Minor Changes

- Added `delete` method to `SearchObject` and `Shortcut` classes.
- Added `delete_profile_folder` method to the `User` class to allow deleting profile folders.
- Added `delete_profile` argument to delete method of the `User` class to allow deleting user profiles along with the user.
- Added `default_email_address` and `email_device` arguments to create and alter methods of the `User` class to allow setting default email address and email device.
- Changed output of execute method for `IncrementalRefreshReport` from `None` to `Job` object.
- Added `refresh_status` method for `Job` object to update status of already completed job.
- Added `list_palettes` method to `Document`.

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MicroStrategy ONE (December 2024)

MicroStrategy Library

MicroStrategy AI

- Forget learnings from previous chat sessions, whether you are in active chat session or not.
- You can allow Auto Answers and bots to use the most recent time frame in the data when a query does not specify a time period. This ensures that queries use timely and relevant data. For an example of this feature, see Example: Automatically apply a time filter when a query does not specify a time period. To allow this, enable the **Apply Time Filter When Time Is Not Specified** setting:
  - For a bot, in the Customizations panel.
  - For Auto Answers, in the Dashboard Properties dialog box.
- A single comprehensive answer is provided for open-ended questions in bots, Auto Answers, and Auto Dashboards. To see additional data, follow up on the response. For details and examples, see Ask Open-Ended Questions.
- Configure your own Azure-supported OpenAI endpoint to use in your MicroStrategy environments. Contact MicroStrategy to assist with the configuration and note the following details and values that are needed for your configuration:
  - Your Service Principal must have the Cognitive Service User privilege at the subscription level.
  - Your DSI
  - `endpoint`
  - `clientID`

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- clientSecret
- tenantID

Dashboards

- You can enable the display of object descriptions as tooltips in chapter filters and selectors. Enable or disable it using the Dashboard Properties dialog box. For an example, see Filter panel.
- You can enable incremental fetch for custom visualizations that include incremental fetch in their code. Enable it using the More Options dialog box for the custom visualization.
- Dynamically pass parameter filters and value prompts using the URL API.

MicroStrategy Workstation

Dashboards

- You can enable the display of object descriptions as tooltips in chapter filters and selectors. Enable or disable it using the Dashboard Properties dialog box. For an example, see Filter panel.
- You can enable incremental fetch for custom visualizations that include incremental fetch in their code. Enable it using the More Options dialog box for the custom visualization.

Administration

- You can search "anything by everything" using the new global search in Workstation. This search engine provides a fast, powerful global search, not limited to one object type. Advanced search functions such as wildcards and filtering the search results are supported.
- You can save your search criteria as a search object, so you can re-use and edit it whenever you need.
- Application and content group enhancements:

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- You can enable **Pre-cache** for each content group in the application. This means that when a user logs into the application in iOS Mobile for the first time, all the dashboards in the content group are downloaded for offline use.
  - Each dashboard is pre-cached with the last closed view or the last saved view, depending on how the **View in Library** property is set in the Dashboard Properties Dialog Box.
  - The targets of any links in the dashboards are also downloaded, so users can smoothly transition between dashboards in offline mode.
  - Bookmarks, links defined with URLs, and dashboards with prompted datasets are not pre-cached, although you can manually pre-cache bookmarks so they are available for offline use.
  - When a dashboard is available for offline use, either through pre-caching or downloading, the **Available Offline** indicator (a green check) displays on its cover. The indicator turns orange when the cache is not up to date or is incomplete. You should download the dashboard again before switching to offline mode.
  - For more details, see the Download and Pre-Cache Dashboards for Offline Use.

    Before enabling pre-caching, clear any dashboard caches on the server that were generated before the upgrade to MicroStrategy ONE (December 2024).

- You can disable some interactivity with visualizations in your application. You can disable the Maximize Visualization icon and/or the Show Data option on the menu icon.
- You can customize the notification email that users receive when a subscription is created in Library. You can also select the color of the

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text, the content area background, and the email background for all emails. For instructions, see Configure Notification Emails When Sharing Content in Library.

- Providing the MicroStrategy Library URL when you create an environment is easier. "MicroStrategyLibrary" is automatically added to the end of the URL.
- Project descriptions display when you create an environment or edit the connected projects. Hover over a project to view the full description.
- You can enable and disable auto-connect without disconnecting or reconnecting an environment.
- Users with read-only access to users, can choose **Edit** in the user right-click menu to view user details but cannot make any changes.
- A **Date Created** filter was added to Users and Groups.
- Export user groups, contacts, and contact groups to CSV.
- Administrators can assign security filters to users and user groups regardless of project access.
- View dependent subscriptions for your dashboards, reports, schedules, and events.
- Refresh multiple cubes on the caches monitor and datasets page.
- Dataset and cube properties display its connection type.
- A **Last Refreshed** column was added to the caches monitor table.
- Use the Maximum memory consumption per cube publishing (MB) setting to define how much memory a user group can use when publishing a cube.
- Preview and edit tables for a streamlined schema update process.

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- Add dynamic attributes and metrics to subscription email subjects and body text and edit subscription content file names with static or dynamic text.
- The project-level setting, **Cache encryption level on disk**, now supports only **AES with 256 bit key** or **None**. If you upgrade your environment from an older version with **Low (Simple)** or **High (AES with 128 bit key)** values, they will not be updated. However, if you update this setting to the supported values, you can not revert it to the unsupported values.
- Use the project-level setting, **Permissive object handling for users without execute access**, to automatically exclude objects that users lack execute permissions from dashboards and reports. This setting ensures dashboards run without errors by removing restricted objects. The default value is off for existing projects and on for new projects.
- Retrieve database credentials for HashiCorp and AWS Secrets Manager vault systems and create database logins based on vault secrets.
- Add system prompt mapping and nested groups to your OIDC authentication.
- Configure Workstation redirect URIs when setting up OIDC authentication.

MicroStrategy HyperIntelligence

- When you are viewing a HyperIntelligence card that is integrated with an Auto Bot, the bot includes the card's context in your query, using that context to filter the response.

  For example, you are viewing a card with information about a specific product, including which store has the most sales for the product. When you ask the bot what other products from this store have the most sales, the bot uses the store information from the card as the filter for the response. The card's context also affects the bot's suggested questions.
- Support for OS 15 and SDK 15 for HyperMobile on Android.

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R Integration Pack

The R Integration Pack is no longer supported. See KB487053 for more information.

MicroStrategy Library Mobile

Android

Support for OS 15 and SDK 15.

MicroStrategy Mobile

Android

Support for OS 15 and SDK 15.

MicroStrategy Office

Legacy office is no longer supported. See KB487052 for more information.

Excel

Import grids that use outline mode while preserving formatting.

Platform Analytics

Enhanced metadata handling by using GUIDs for unique identification, ensuring seamless transitions during upgrades for single-environment customers.

> ⚠ If you are using multi-tenant Platform Analytics or multiple environments connected to the same Platform Analytics, you should ensure the GUID is different for each environment's metadata before upgrading to MicroStrategy ONE (December 2024).

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For more information to check your metadata GUID, see KB487044. If your metadata GUIDs are not unique across all your environments, contact MicroStrategy Technical Support.

MicroStrategy Visualization SDK

You can add incremental fetch to custom visualizations in the SDK, and enable it in the dashboard.

MicroStrategy Library Mobile SDK

iOS

When you customize MicroStrategy Library Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sonoma 14.7 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 16.1 with Apple iOS SDK 18.1.

MicroStrategy Mobile SDK

iOS

When you customize MicroStrategy Library Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sonoma 14.7 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 16.1 with Apple iOS SDK 18.1.

MicroStrategy Packages for Python (mstrio-py)

New Features

- Added `list_fences` method and `Fence` class in `mstrio.server.fence` subpackage to allow management of Fences.

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- Added `list_cluster_startup_membership` and `update_cluster_startup_membership` methods to `Cluster` class in `mstrio.server.cluster` to allow management of cluster startup membership.
- Added arguments `add_to_cluster_startup` and `remove_from_cluster_startup` to `add_node` and `remove_node` methods in `Cluster` class in `mstrio.server.cluster` to allow adding and removing nodes from cluster startup.
- Added `port`, `status`, `load`, `projects` and `default` attributes to `Node` class in `mstrio.server.node` subpackage.
- Added `get_status_on_node` method to `Project` in `mstrio.server.project` class to allow checking the status of a project on a specific node.
- Added `lock`, `unlock methods` and `lock_status` property to the `Project` class in `mstrio.server.project` to allow managing project locks.

Minor Changes

- Added `include_subfolders` flag to `list_folders` method of `mstrio.object_management.folder` package to allow getting all folders in the specified project or configuration-level folders.
- Added `parent_folder` argument to `list_folders` method of `mstrio.object_management.folder` package to allow getting all folders from a specified parent folder only.

MicroStrategy Cloud Platform

Upgraded to Kubernetes version 1.30.

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Intelligence Server

- Support seamless Intelligence Server session failover to ensure uninterrupted dashboard and Bot consumption and authoring by transparently backing up and restoring user sessions during Intelligence Server scaling or unexpected termination in containerized environments.
- AES-256 encryption is on by default to ensure your data is protected with the most secure encryption algorithms available.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Denodo connector enhancements:
  - Connect to Denodo using a JDBC connection.
  - Use Microsoft Entra ID to configure your Denodo OAuth parameters.
  - Use the Denodo JDBC driver to implement OIDC single sign-on with Okta.
- Certified gateway versions
  - Windows Server 2025

MicroStrategy ONE (October 2024)

MicroStrategy Cloud Platform

Add support for GCP deployments in Los Angeles and Tokyo regions.

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MicroStrategy ONE (September 2024)

MicroStrategy Library

MicroStrategy AI

- Bots, Auto Answers, and Auto Dashboard have been upgraded from GPT-3.5 and GPT-4 usage to GPT-4o. By taking advantage of faster speed of GPT4o together our internal optimization of performance, MicroStrategy's platform is now two times faster than MicroStrategy ONE (June 2024).
- Deliver natural language summaries of dashboard pages or specific visualizations using auto narratives. Tailor the narrative format, highlight key trends with customizable color-coding, and dynamically update insights based on user interactions and filter conditions.
- Define custom instructions in the dashboard editor for Auto Answers responses.
- Bots and Auto Answers recognize and answer open-ended business questions.
- Bots, Auto Answers, and Auto Dashboard responses provide more descriptive statistics.
- Leverage advanced mode for more in-depth data preparation, enabling you to review, correct, and manipulate datasets with greater precision.
- Support for multiple datasets in Bots as well as support for report objects as a valid dataset format.
- Download learnings created or used inside Bots or Auto Answers in a .csv file format.
- Manually create AI indexes and view a new **Partially indexed** status in the dataset.
- The custom instruction character limit increased to 2500 characters.

Dashboards

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- Improved the Library Home page filter panel for simplified object browsing, improved the filter panel organization to ensure consistency with the Library search results page, and other Library Home page updates.
- Get to your data faster using a bookmark with pre-selected filters, prompt answers, or other manipulations from the Library Home page.
- Configure PDF export options at the dashboard level.
- Create contextual links in visualizations and images or text to a dashboard in a different project while maintaining filter selections.
- Import SharePoint lists and SharePoint/OneDrive files such as CSV, Excel, and JSON.

MicroStrategy Workstation

MicroStrategy AI

Deliver natural language summaries of dashboard pages or specific visualizations using auto narratives. Tailor the narrative format, highlight key trends with customizable color-coding, and dynamically update insights based on user interactions and filter conditions.

Dashboards

- Configure PDF export options at the dashboard level.
- Configure and add action buttons to a modern grid to trigger actions defined in an associated Python script.
- Create contextual links in visualizations and images or text to a dashboard in a different project while maintaining filter selections.
- Import SharePoint lists and SharePoint/OneDrive files such as CSV, Excel, and JSON.

Administration

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- Retrieve database credentials from a secret vault system, such as CyberArk, by creating, editing, and deleting vault connections. Create database logins based on the vault secret.
- Multiple OIDC and SAML configurations are supported. This support allows different applications to utilize SAML with various identity providers (IDPs) or OIDC with different identity access management systems (IAMs).

- Manage ACLs for user group child objects.
- A new **Enable Dynamic Working Set Limit** server-level setting that allows the Intelligence server to automatically increase or decrease the working set limit based on user settings and available resources in the system.
- A new **Unload cube caches not used for (minutes)** server-level setting that allows a user to release the cube cache from memory if it's not accessed by the specified amount of time.
- New **Show delivery address for subscription results for Administrator** and **Show delivery address for subscription results for Owner** project-level settings that allow administrators or subscription owners to view the plain email address. The delivery address is hidden by default for security purposes.
- Two new object types are supported for migration packages: **Scripts** for object packages and **Runtime** for administration packages.
- Enhanced timezones to consider a user's preferred timezone when resolving dynamic dates or datetimes in filters or value prompts.
- History list enhancements:

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  - Mark history list messages as read or unread.
  - A new **Delete History** button that lets users purge all currently filtered messages.
  - New Source and Content ID columns and a reordering of existing columns.
  - Tooltips appear when cell content is too long.
  - Updated differentiation between dashboards, documents, reports, OLAP cubes, and MTDI cubes, along with their respective icons.
- Create multiple connections to one environment, rename an environment, and create a new project while connecting to an environment.
- Change the Library Home page display name.
- Application and content group enhancements:
  - New **Location** and **Version** columns.
  - Access create content groups and applications dialog from the Navigation pane.
  - Unified right-click menu.
- Caches monitor enhancements:
  - Expanded filter options and improved search functionality.
  - Perform a single cube refresh for OLAP and MTDI cubes.
  - A new **Send to History List** option in datasets.
- Updated change journal columns and filters.
- Added change journal to the following properties dialogs:

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  - Monitor > Triggers > Schedules > Properties
  - Monitor > Triggers > Events > Properties
  - Environment properties > Subscription properties > Delivery Type
  - Environment properties > Subscription properties > Delivery Device
- Added change journal to the following right-click menus:

  All Users, Applications, Bots, Cards, Content Groups, Dashboards, Data Sources, Datasets, Documents, Objects, Planned Tasks, Reports, Scripts, Subscriptions, and User Groups.
- Integrate OIDC support with Google.

MicroStrategy Library Mobile

iOS

- Support for iOS 18.
- Dashboards use the default PDF export options set at the dashboard level in Library or Workstation.
- Create links in visualizations and images or text to a dashboard in a different project while maintaining filter selections.

Android

- Dashboards use the default PDF export options set at the dashboard level in Library or Workstation.
- Create links in visualizations and images or text to a dashboard in a different project while maintaining filter selections.

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MicroStrategy Mobile

iOS

Support for iOS 18.

Federated Analytics

MicroStrategy for Tableau

Support for Tableau Web Data Connector 3.0.

MicroStrategy for Office

Excel Add-in

- Automatically refresh Excel workbooks.
- Reuse prompt answers for imported objects without additional confirmation.
- Import all or select chapters and pages of a dashboard.
- Overwrite data in an existing cell.
- Updated import settings.

PowerPoint Add-in

- Automatically refresh PowerPoint presentations.
- Reuse prompt answers for imported objects without additional confirmation.
- Import all or select chapters and pages of a dashboard.

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Teams App

Interact with Bots in private messages, group chats, and Teams channels.

Platform Analytics

- Gain visibility into the adoption and performance of auto narratives across your dashboards with auto narratives insights. Track usage metrics, execution success rates, and detailed user interactions to ensure optimal narrative performance and uncover opportunities for improvement.
- Auto learning insights enables administrators to access, review, and download user-generated learnings from across the environment. This powerful tool enables the identification and promotion of valuable insights as knowledge assets, extending their benefits to entire teams or the entire organization.
- Enable more performant time-series analysis. Evaluate adoption or usage month over month, quarter over quarter, or year over year, without waiting hours for a report to aggregate the transactional data.
- Enhanced the Status attribute in the Platform Analytics Project.
- Added a Job Canceler attribute that displays the MicroStrategy User who cancels a job.

MicroStrategy Library Mobile SDK

iOS

Hide the back button on the navigation bar so users can navigate through dashboards using customized links that you place on the screen.

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MicroStrategy Packages for Python (mstrio-py)

A new `mstrio.object_management.migration` subpackage was added as an official release. This subpackage replaces the old module for object migrations introduced in 2021 Update 5 as a Preview Feature and is a breaking change.

- Added `list_migrations` method, `list_migration_possible_content` method, and Migration class to `mstrio.object_management.migration.migration` subpackage to allow management of migrations
- Added `PackageConfig`, `PackageContentInfo`, `PackageType`, `PackageSettings`, `PackageStatus`, and more classes to `mstrio.object_management.migration.package` subpackage to allow management of migration packages.
- Added the `list_bots` method and `Bot` class in the `mstrio.project_objects.bots` subpackage to allow management of Bots
- Added the `list_content_groups` method and `ContentGroup` class in the `mstrio.project_objects.content_group` subpackage to allow management of content groups.
- Added the `list_applications` method and `Application` class in the `mstrio.project_objects.applications` subpackage to allow management of applications.
- Added the `StorageService` class for the Storage service configuration of an environment.
- Added the `storage_service` property, `fetch_storage_service`, and `update_storage_service` methods to the `Environment` class to manage the environment's Storage service configuration.

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- This is the official release of the `Migration` class and its methods, which introduces some breaking changes compared to the "Preview" state.
- Added the `last_update_time` property to `Cube` based classes.

Intelligence Server

- Improve server stability and prevent memory outages by swapping the least recently used server messages to disk in low memory scenarios.
- Improvements in memory management may require additional disk space for situations where the client session timeout is more than two hours. The default client session timeout setting and lower values are not affected.
- An opt-in enhancement to the ALTER USER Command Manager script is available. See KB486957 for more information.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Create connections and run analytics with optimized SQL against Microsoft Fabric Warehouse.
  - Support OIDC single-sign-on and and Service Principal authentication using Entra ID.
  - Create connections with out-of-the-box Microsoft JDBC for SQL Server driver.
- Create Redshift data connections using the native Amazon Redshift JDBC driver, in addition to the MicroStrategy-branded drivers.
- Create SAP HANA data connections using the native SAP HANA JDBC driver.
- Support for Google BigQuery Single Sign-On Using Google.

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- Certified gateway versions
  - IBM Db2 for z/OS 13
- Out-of-the-box driver updates

  Ensure security and reliability by supporting OpenSSL 3.x and other security updates for the following drivers:
  - Windows Driver Manager Files
  - Hive ODBC driver
  - IBM Db2 ODBC driver
  - Spark JDBC driver
  - Hive JDBC driver
  - Impala JDBC driver

MicroStrategy ONE (June 2024)

MicroStrategy is upgrading to Tomcat 10.1.x and JBoss 8 along with Spring 6. See 2024 Platform Certification Changes for more information.

MicroStrategy Library

MicroStrategy AI

- Enhanced Auto AI Visualizations: Dynamically select diverse visualization types based on contextual analysis, prioritizing user demand, keywords, and data components for streamlined decision-making.
- Auto Answers and Bots now support Bubble Charts, Horizontal Bar Charts, Vertical Clustered Bar Charts, and Insights+ Line Charts with Break By. This support enables users to visualize complex data relationships, rankings, comparisons, and trends more effectively.

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- Cognitive Element Search enhances MicroStrategy AI accuracy using advanced index and semantic search capabilities to intelligently interpret user queries that contain element names, or element names with spelling mistakes, abbreviations, or synonyms. Business users can use this support for a wide range of query complexities and benefit from more meaningful and engaging chat-based analytic experiences.
- Empower Auto to learn and personalize responses. Auto adapts based on user feedback and clarifications, storing what it learns at an individual user level. This personalized learning improves future interactions and ensure that responses align with each user's preferences.
  - Improve Auto responses with feedback. Users can give feedback with thumbs-down and comments, and administrators can monitor performance and user interactions through the Auto Adoption Dashboard.
  - Improve the user experience with Smart Suggestions. When Auto detects an ambiguous query, it provides a default answer and suggests alternative options to help users clarify their queries and get more accurate results.
- Knowledge assets now require a user privilege.
- Use annotations in AI Interpretation and Execution for more information on how knowledge assets and user-level learnings were applied to answer a question.
- Enhance control levels over what information gets to AI and choose attribute forms for analysis and answer display.

Dashboards

- Parameters can be applied to dataset filters, therefore increasing performance and reducing load on the warehouse. The dataset query is executed after users make choices on the Filter panel or within in-canvas

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selectors.

- Users have more control over chapter filters. Users can specify the dataset from which all the attribute elements in the filter are sourced from.
- Introducing enhanced experiences for viewing wide grids by adding options to pin and freeze columns. Users can now freeze to the left or pin particular column(s) of interest to the left or right for better data analysis and comparison. Authors can define certain columns to be pinned or frozen by default.
- An enhanced Fit To Container mode now offers improved grid space utilization. Users can set minimum and maximum column widths, specify fixed widths for specific columns (such as the year), and dynamically adjust other columns (such as the address) for optimal width distribution.
- A lock ratio setting was added to enhance dashboard zoom behavior. Use lock ratio to choose a pre-defined or customized ratio so the dashboard can expand or contract according to zoom changes while maintaining component ratios.
- Export to Excel and PDF enhancements:
  - Seamlessly choose chapters, pages and visualizations to be included in export.
  - Choose option to export all objects from a page onto a single Excel sheet.
  - Export includes visualizations imported as data and other non-visualization objects such as images and text boxes.
  - Export supports free-form dashboard layout.
  - Select multiple pages or chapters when exporting.

Administration

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- MicroStrategy delivered on its 2024 roadmap and updated MicroStrategy Library and MicroStrategy Web to the Jakarta EE 10 platform. This update removes support for Tomcat 8.x, Tomcat 9.x, and JBoss 7.x and adds support for Tomcat 10.1.x and JBoss 8.x. For more information, see Spring Security SAML Provider 6.2.3 Upgrade. The following authentication and configurations are also affected:
  - Spring Security SAML Customization
  - Logging into Library using Kerberos authentication with Tomcat 10 is affected. See KB486775 for more information.
  - Customizations made to MicroStrategy's bundled Tomcat, specifically to enable HTTPS, require changes to accommodate Tomcat 9, versus Tomcat 10 syntax. See KB486843 for more information.
- Use Cognitive Search, a centralized search service, that adds support when users search using synonyms, typos, abbreviations, natural language, and multilingual search queries.

MicroStrategy Workstation

MicroStrategy AI

- Customize the out-of-the-box AI disclaimer that displays in MicroStrategy AI offerings including Auto Answers, Auto Dashboard, Bots, and so on.
- Allow application owners to configure Auto knowledge assets at the application level and manage knowledge assets from a single view.
- Configure adaptive learning and user feedback at the application level.

Dashboards

- Parameters can be applied to dataset filters, therefore increasing performance and reducing load on the warehouse. The dataset query is executed after users make choices on the Filter panel or within in-canvas

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selectors.

- Users have more control over chapter filters. Users can specify the dataset from which all the attribute elements in the filter are sourced from.
- Introducing enhanced experiences for viewing wide grids by adding options to pin and freeze columns. Users can now freeze to the left or pin particular column(s) of interest to the left or right for better data analysis and comparison. Authors can define certain columns to be pinned or frozen by default.
- An enhanced Fit To Container mode now offers improved grid space utilization. Users can set minimum and maximum column widths, specify fixed widths for specific columns (such as the year), and dynamically adjust other columns (such as the address) for optimal width distribution.
- Mark attributes that should not be aggregated across multiple elements as non-aggregatable attributes to ensure accurate data slicing and reporting. Non-aggregatable attributes are available in traditional reporting and in MicroStrategy AI.

Administration

- Due to the end of the six-month notice for decommissioning Workstation Mac, Intelligence server will no longer accept connections from Workstation Mac. Users are advised to switch to Workstation on Windows for continued access and support.
- Create Freeform SQL Intelligent cubes.
- Create Freeform SQL Incremental Refresh Reports.
- Increase the scalability of the history list solution and migrate history list data storage to hybrid mode.
- Perform bulk actions on multiple users within the User and User Groups blades. This allows Administrators to efficiently manage user-related tasks

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in a streamlined manner. Select multiple users at once and perform actions such as updating permissions and modifying settings, saving time and effort in user management. Additionally, you can configure security access for user groups, view dependent subscriptions for users, and export users.

- Search recursively by name and ID in the Project blade. You can also filter by name, owner, date created, date modified, ID, location, and description in all Analysis blades.
- Detailed execution results for subscriptions, enabling Administrators and Power Users to easily identify recipients and the timing of content delivery from subscription results. This enhancement applies to all email, file, and mobile subscriptions.
- Administrators have the ability to set up password expiration rules for users during creation or editing, in line with customer internal security policies. Additionally, to streamline user maintenance processes, we have introduced the option to delete users along with their corresponding user profile folders.
- An HTML/JavaScript Content filter was added to the Content Inspector.
- A lock ratio setting was added to enhance dashboard zoom behavior. Use lock ratio to choose a pre-defined or customized ratio so the dashboard can expand or contract according to zoom changes while maintaining component ratios.
- The Maximum memory consumption per job (MB) setting applies to subscription job when subscription job level governing is turned on. Memory used by subscription jobs cannot exceed 30% of total memory by default. If the limit is reached, subscription requests will be postponed and subscription delivery may be delayed.
- The server-level setting, **Maximum memory consumption for Intelligent Cubes (%)**, allows administrators to set the percentage of system RAM

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that Intelligent Cubes are allowed to consume. This setting is only exposed in the container environment.

- The server-level setting, **Maximum RAM for Working Set Cache %**, allows administrators to set the maximum RAM for he working set cache in terms of the percentage of total memory in a container environment.
- The project-level setting, **Maximum memory consumption for Excel files (MB)**, is exposed to allow administrators to limit the memory consumption for Excel files generated from MicroStrategy Web. The default value is **Use inherited value** (-1). This means that when you upgrade to the latest build, you won't be affected by this setting and will continue to use the value set at the server level.
- Use Cognitive Search, a centralized search service, that adds support when users search using synonyms, typos, abbreviations, natural language, and multilingual search queries.

MicroStrategy HyperIntelligence

Enhance your Hyper insights by integrating Bots with selected cards for deeper, multi-layered analysis. Leverage the power of Hyper and AI seamlessly, whether you're working in a browser or on your mobile device.

MicroStrategy Library Mobile

- Bots include a thumbs-down icon to collect user feedback, smart alternative suggestions, and improved response quality and accuracy through learning from user feedback.
- Improved capability to view wide grids on mobile devices by freezing a column or set of columns to the left while scrolling through the rest of the grid for better data analysis and comparison.

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- Improved dashboard performance with newly introduced dataset level filters with parameters by reducing the query result set.
- The Spring Security SAML provider was updated to v6.2.3 and includes the following affected authentication and configuration:
  - Spring Security SAML Customization

MicroStrategy for Office

Excel Add-in

- Automatically distribute data across multiple Excel sheets using imported page-by reports.
- Import data directly into a PivotTable format, with automatic population of rows using Attributes and values using Metrics.
- Utilize an object details setting to specify which information should appear in the side panel and which should be directly imported into the Excel sheet for each object.
- Import attributes as text to ensure accurate data representation
- Choose between merged or unmerged columns when importing cross-tab grids.
- Track imported content with an improved side panel that groups objects based on their Excel sheet placement.
- Import reports and grid visualizations while preserving their original formatting.

PowerPoint Add-in

- Track imported content with an improved side panel that groups objects based on their PowerPoint slide placement.

Teams App

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- Register an Azure bot in Microsoft Azure.
- Share bots and dashboards as hyperlinks via the MicroStrategy Teams app.

Platform Analytics

- Configure the Usage Telemetry Service to collect feedback information in the Auto Adoption Dashboard.

MicroStrategy Library SDK

- Provide a dependency list for the Library Web app restful-api jar.

MicroStrategy Library Mobile SDK

The Strategy Library Mobile SDK for Android is certified to work with Android 16 (API level 36). When you customize Strategy Library Mobile SDK for Android, you must have Android SDK 36 to develop and compile your application. Android Studio Iguana and newer is supported.

MicroStrategy Mobile SDK

The Strategy Mobile SDK for Android is certified to work with Android 16 (API level 36). When you customize Strategy Mobile SDK for Android, you must have Android SDK 36 to develop and compile your application. Android Studio Iguana and newer is supported.

Intelligence Server

- *Preview Feature*: Additional scenarios for cube accessibility are supported regardless of the status of the node where the cubes were initially published.

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- Platform Analytics Warehouse supports JDBC connections with PostgreSQL.
- Increase the scalability of the history list solution and migrate history list data storage to hybrid mode using the Configuration wizard.
- Improved the Working Set Cache to enhance the accuracy of memory usage calculations and enforce a minimum value for the Maximum RAM for Working cache to ensure it remains at 15% of the total memory.
- Enable stronger application-level encryption at AES-256 for objects stored in the metadata. MicroStrategy recommends users implement full-disk and database level encryption as part of a comprehensive security practice in addition to application level encryption.
- Use more granular control over the cube unload process in low memory.

MicroStrategy REST APIs

The unified Bot API is a streamlined interface designed to seamlessly integrate MicroStrategy AI into virtually any enterprise application. Key features include:

- Simplified Integration: Users no longer need to maintain individual Bot instances.
- Automatic Bot Selection: Users no longer need to specify which Bot to send your data questions to. The API leverages advanced semantic search to automatically identify and engage the appropriate Bot.
- Visualization Export: A new API endpoint allows users to export static visualization images from data answers. This enhances the end-user experience by providing a more visually appealing data representation.

MicroStrategy Packages for Python (mstrio-py)

New Features

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- Automate the refresh (full or incremental) and deletion of OLAP and MTDI cubes. This enhancement is particularly valuable for Administrators, as it streamlines the process of managing cubes. To automate the refresh of these cubes without any interaction and creating a `Job`, we have added the `refresh()` method to the `OlapCube` and `SuperCube` classes. To assist users, we have provided useful workflows for managing cubes within Python scripts.
- Added support for providing a folder path, instead of a folder ID, to methods within the `Folder` class, as well as `quick_search`, `full_search`, and all methods inheriting from them that accept a folder ID argument.
- Added `include_subfolders` flag to the `get_contents` method of `Folder` class to allow getting the contents of the children of the specified folder recursively.
- Added the `sql` property to the `Report` class, allowing the retrieval of the SQL view of a report without executing it.
- Added the `IncrementalRefreshReport` class to the `mstrio.object_management.incremental_refresh_report` package to allow the management of Incremental Refresh Reports.
- Added the `list_incremental_refresh_reports` method to allow the listing of Incremental Refresh Reports in a project.
- Added the `quick_search_by_id()` function to `mstrio.object_management.search_operations` to allow searching for objects by object and project ID.
- Added the `send_email()` function in `mstrio.distribution_services.email` to allow the sending of emails.
- Added the `execute_query()` method to the `DatasourceInstance` class to allow the execution of SQL queries.

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- Added the `status` property to the `Subscription` class to allow the checking of a subscription status.
- Added support for answering prompts in the `to_datasource()` method of the `Report` class, along with a `Prompt` class in `mstrio.project_objects.prompts` to support prompts.
- Added support for `password_auto_expire` and `password_expiration_frequency` fields to the `User` class.
- Added support for page-by in the `Report` class.
- Added support for VLDB properties in the `Report` class.

Minor Changes

- Added a warning message to the `OlapCube` and `SuperCube` classes that appears when the provided ID belongs to different type of Cube.
- Updated `PageSize` Enum values to allow proper subscription initialization.
- Added support for both `name` and `display_name` in the VLDB settings provided by ModelVldbMixin.
- Added a `vldb_settings` property in the `VldbMixin` class that stores VLDB settings in dict with setting names as keys.

MicroStrategy Cloud Platform

- MicroStrategy Backup and Restore supports Storage Service
- Support for PostgreSQL 14 and 16
- Support for Oracle 21c
- Support for SQL Server 2022

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Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Certified gateway versions
  - Teradata 20.x
  - Greenplum 7.x
  - Informix 14.10
  - Yellowbrick
- Out-of-the-box driver updates

  Ensure security and reliability by other security updates and fixing bugs for the following drivers:
  - Oracle ODBC driver
  - Spark JDBC driver
  - Exasol ODBC driver
  - Google BigQuery JDBC driver
  - Salesforce ODBC and JDBC drivers
  - Driver Manager files

Privileges

See Privileges by License Type for information about license types and associated privileges.

The following existing privileges were removed from the Server - Reporter license and added to the MicroStrategy AI license:

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- Create and Edit AI Bots
- Run AI Bots
- Use Auto Assistant and ML Visualizations

The Create and Configure Knowledge Assets privilege has been added to the MicroStrategy AI license.

MicroStrategy ONE (March 2024)

Dossiers have been renamed to dashboards to simplify the user experience across enterprise systems and follow the best naming convention practices in the BI industry. You may notice that existing folders are named "My Dossiers" and "My Shared Dossiers", while new user profile folders are named "My Dashboards" and "My Shared Dashboards". For more information, see KB486427: Rename "My Dossiers" and "My Shared Dossiers" to "My Dashboards" and "My Shared Dashboards" for Each User Account.

MicroStrategy is transitioning from Java 11 to Java 17 in this release. MicroStrategy ONE cloud hosted environments, or MicroStrategy on-premises environments that use the bundled Tomcat version, will have the necessary changes automatically applied during their upgrade. MicroStrategy on-premises environments with their own web application server must upgrade the JDK to JDK17. MicroStrategy Web ASP environments should not see any impact. Customizations written using Java 11 versions should continue to work with Java 17. See *Platform Certifications* for more information.

MicroStrategy introduces granular control over HTML and JavaScript execution to enhance security. If HTML and scripts were globally allowed before upgrading, they are now paused by default after upgrading to MicroStrategy ONE (March 2024). The update activates granular settings and requires you to review and authorize HTML and script usage individually. MicroStrategy encourages you to invalidate all caches and use

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the inspector tool available in Workstation to selectively enable content in each dashboard, document, and report. This proactive measure ensures a safer environment by minimizing unwanted script execution while maintaining functionality, where trusted. If you are upgrading to MicroStrategy ONE from a previous version, see KB486433: HTML Content Settings When Upgrading to MicroStrategy One (March 2024) or Later from Previous Versions. If you are using the Content Inspector tool with certified objects, see KB486729: Use Content Inspector with Certified Objects.

MicroStrategy Library

MicroStrategy AI

- Auto Answers and Bots can answer compound multi-faceted questions that allow deeper, contextually rich insights drawn from multiple data points within the same query.
- Auto enables dashboard and Bot owners to boost chat experiences by allowing owners to upload knowledge assets such as business glossaries, acronyms, and synonyms. Knowledge assets ensure business users receive more accurate data answers.
- Auto Answers adds support for queries across multiple in-memory datasets within a single dashboard, including reports, subset reports, and cubes. This enhancement enables you to seamlessly integrate and interrogate data across different datasets for richer, more informed insights.
- Use AI Interpretation and Execution for a deeper understanding into how AI interprets and executes its queries, which enhances transparency and insight in data exploration. Using specific information based on user privileges, power users gain access to robust tools for efficient troubleshooting and validation.
- The snapshot panel adds new options to rename a snapshot title, ask again, and clear all snapshots.

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- When creating a Bot, right-click an object in a dataset to rename it or configure a number format.
- Format a visualization filter or selector to apply to Auto Answers and Auto Dashboard. Auto Answers responses are based on the selector content and visualizations generated using Auto Dashboard are automatically filtered.
- When creating a Bot, add up to three topics related to the dataset used in the Bot. Topic summaries that are retrieved during consumption help onboard the Bot consumer and inspire them with insights the Bot can provide. The Ask About panel provides a closer look at dataset objects to support in depth questions.

Dashboards

- Leverage Python enabled transaction grids in dashboards to update records in Salesforce, ServiceNow, and more.
- Dashboard authors can require users to make filter selections before displaying data.
- Improved legend positioning for bar, line, area, scatter, and pie charts.
- Mapbox boundaries are upgraded to Enterprise v4. This upgrade improves data coverage and updates boundary information.
- Set metric value as HTML content from the Metric Editor and data import.
- Display HTML and JavaScript content in documents, reports, dashboards, and Bots according to the object-level security setting.
- Empower users to seamlessly leverage and reuse prompted answers across diverse prompts while importing content through MicroStrategy Library, streamlining data analysis and enhancing productivity.

Administration

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- Define display behavior for notifications. Turn on **Persistent Notifications** so notifications appear until they are acknowledged.
- The My Language setting has been updated to control language preferences for metadata and data.

MicroStrategy Workstation

Dashboards

- Dashboard authors can require users to make filter selections before displaying data.
- Improved legend positioning for bar, line, area, scatter, and pie charts.
- Mapbox boundaries are upgraded to Enterprise v4. This upgrade improves data coverage and updates boundary information.

Administration

- Create a Python enabled transaction dashboard.
- The MicroStrategy Storage service supports Google Cloud Storage.
- The Automatic option for Maximum memory consumption per job setting's default was updated to 10% of the total memory when a specific value is not set.
- Improve server stability and prevent memory outages by dynamically adjusting the job level governing in low memory situations.
- Modify a project's primary data source and add/remove data sources from a project.
- Streamlined ability to create, edit, and delete standalone database connections and logins.
- Restrict multiple sessions from multiple devices.

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- Configure granular control of HTML and JavaScript content via an environment-level security setting.
- Use the Content Inspector tool to perform granular control on HTML and JavaScript content at the object level. If you are using the Content Inspector tool with certified objects, see KB486729: Use Content Inspector with Certified Objects.
- Support IAM based modern authentication (OAuth 2.0) for smart hosts such as Microsoft Exchange for email delivery devices.
- Update Workstation from the menu bar or a banner on the main window. To streamline the installation process and reduce unnecessary components, the MicroStrategy service tray has been removed.
- View components and dependents for hierarchies and tables. You can also view system managed objects, as well as an object's ID and location.
- New Description and ID columns in the objects grid.

MicroStrategy Library Mobile

iOS

- Use Bots to gather insight on a selected dataset, save your favorite responses using snapshots, embed a bot to a web page, and share your bot with other users.
- Use AI Interpretation and Execution for a deeper understanding into how AI interprets and executes its queries which enhances transparency and insight in data exploration. Using specific information based on user privileges, power users gain access to robust tools for efficient troubleshooting and validation.
- The snapshot panel adds new options to rename a snapshot title, ask again, and clear all snapshots.

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- Display HTML and JavaScript content in documents, reports, dashboards, and Bots according to the object-level security setting.
- Support for Python transactional grids.
- Filters can be configured as required.
- Upgraded geospatial boundaries for an accurate worldview.
- Support for legend position at the top or bottom of a graph.

Android

- Use Bots to gather insight on a selected dataset, save your favorite responses using snapshots, embed a bot to a web page, and share your bot with other users.
- Use AI Interpretation and Execution for a deeper understanding into how AI interprets and executes its queries which enhances transparency and insight in data exploration. Using specific information based on user privileges, power users gain access to robust tools for efficient troubleshooting and validation.
- The snapshot panel adds new options to rename a snapshot title, ask again, and clear all snapshots.
- Display HTML and JavaScript content in documents, reports, dashboards, and Bots according to the object-level security setting.
- Support for Python transactional grids.
- Filters can be configured as required.
- Upgraded geospatial boundaries for an accurate worldview.
- Support for legend position at the top or bottom of a graph.

MicroStrategy Web

Restrict multiple sessions from multiple devices.

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MicroStrategy for Office

- View, pin, and share Bots in the Teams add-in.
- Share dashboards in Teams using the Teams add-in.
- Import visualizations as an image in the Excel add-in.
- Empower users to seamlessly leverage and reuse prompted answers across diverse prompts while importing content through the intuitive MicroStrategy add-in for PowerPoint, streamlining data analysis and enhancing productivity.
- See an overview of imported objects and interact with them using the Excel and Powerpoint add-ins.

MicroStrategy Library Mobile SDK

The MicroStrategy Library Mobile SDK for Android is certified to work with Android 14 (API level 34). When you customize MicroStrategy Library Mobile SDK for Android, you must have Android SDK 34 to develop and compile your application. Android Studio Giraffe and newer is supported.

MicroStrategy Mobile SDK

The MicroStrategy Mobile SDK for Android is certified to work with Android 14 (API level 34). When you customize MicroStrategy Mobile SDK for Android, you must have Android SDK 34 to develop and compile your application. Android Studio Giraffe and newer is supported.

MicroStrategy REST APIs

- Use MicroStrategy Bot APIs.
- Support for Freeform SQL cubes and Freeform SQL Incremental Refresh Reports (IRRs).

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MicroStrategy Packages for Python (mstrio-py)

New Features

- Added `delete_object_cache()` and `delete_element_cache()` methods to the `Project` class to allow the deletion of object and element caches.
- Added an optional `show_description` argument to `ProjectSettings.list_caching_properties()` to show descriptions for each setting.
- Added `delete_server_object_cache()` and `delete_server_element_cache()` methods to the `Environment` class to allow the deletion of object and element caches from all projects.
- Added a `MobileSubscription` class in the `mstrio.distribution_services.subscription` package to allow management of the new subscription type.
- Added the following new bulk methods to the `Translation` class: `to_json_from_list`, `add_translations_from_json`, `to_database_from_list`, `add_translations_from_database`, `to_dataframe_from_list`, and `add_translations_from_dataframe`.
- Updated the `to_csv_from_list` and `add_translations_from_csv` older translation methods with the functionality present in the newer bulk methods for json, databases and dataframes.
- Added support for the `comments` field in MicroStrategy objects to view and edit their long descriptions.
- Added the `EmbeddedConnection` class to allow access to embedded connection templates in `DatasourceInstance`.
- Added support for Python 3.12.

Minor Changes

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- Updated the script template for data source scripts.
- The `enableHtmlContentInDossier` server setting is now read-only for environments. This setting cannot be changed using mstrio-py since it is superseded by `allowHtmlContent`.

Deprecated

The `mstrio.project_objects.dossier` module is superseded by `mstrio.project_objects.dashboard` and will be removed in the future, after a one year deprecation period

Removed

The MicroStrategy for Jupyter Extension is no longer developed and supported and has been removed from the mstrio-py package in this release. You can still use the mstrio-py library and all its current and upcoming features.

MicroStrategy for RStudio and mstrio for R are no longer supported and developed and have been archived. You can still use the last available version.

MicroStrategy R Integration Pack

The R Integration Pack is in maintenance. No new features are planned. Only critical security updates will be provided.

Intelligence Server

Restrict users from logging in to MicroStrategy from multiple devices.

MicroStrategy Modeling Service

Set the timeout value for requests sent from the MicroStrategy Modeling service to the Intelligence server using the

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`modelservice.iserver.requestTimeout` property in `modelservice.conf`.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Certified gateway versions
  - PostgreSQL 16
  - Oracle 23c
  - Impala 4.x
  - Exasol 8.x
  - MongoDB 7
- Out-of-the-box driver updates

  Ensure security and reliability by supporting OpenSSL 3.x and other security updates for the following drivers:
  - Impala ODBC driver
  - Hive JDBC driver
  - SparkSQL ODBC driver
  - Teradata ODBC driver
  - Redshift JDBC driver
  - Snowflake ODBC driver
  - Google BigQuery JDBC driver
  - Native PostgreSQL ODBC driver
  - SQL Server ODBC driver

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MicroStrategy ONE (February 2024)

MicroStrategy Packages for Python (mstrio-py)

The MicroStrategy for Jupyter extension will no longer be developed and supported and will be removed from the mstrio-py package starting in MicroStrategy ONE (March 2024). You can still use the mstrio-py library and all its current and upcoming features.

MicroStrategy ONE (January 2024)

MicroStrategy Library

Improvements to Auto Answers time-related questions including time level transformations. The update distinguishes between Month and Month of Year and between Quarter and Quarter of Year.

MicroStrategy ONE - Update 12 (December 2023)

MicroStrategy Library

MicroStrategy AI

- Create and customize a stand-alone Bot for your organization. Customize the bot's appearance, custom instructions, data settings, and other general settings.
- Use Bots to gather insight on a selected dataset, save your favorite responses using Snapshots, embed a bot to a web page, and share your bot with other users.
- Auto Answers improvements:
  - Improved response times and accuracy in business intelligence analysis.

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    - Enhanced experience for complex queries such as, year-to-date summaries and non-aggregatable value calculations based on MicroStrategy schema objects.
    - Retain chat history per page while the dossier session is running with a new confirmation step to clear history and prevent accidental data loss.
    - Automatically translated suggested questions based on a user's language preference setting.
- Auto Dashboard evolves and enables an interactive chatbot conversation to create a dashboard page or a visualization and modify generated visualizations on the bot panel, all through natural language commands and questions.

Dossier

- The new data import experience is available out-of-the-box. This new experience includes an organized data source tree that lists all available data sources, a centralized table canvas and powerful search functionality, enabling users to navigate, import, and manage data from multiple sources using a streamlined experience.
- Enable data comparison, dynamic conditions and what-if analysis using parameters.
- Use content discovery to:
    - Rename, copy, move, and delete folder content.
    - Create new folders and shortcuts to organize folder contents.
- Conditionally display text boxes, image, and shapes in dossiers.
- Display totals and subtotals on stacked bar charts.
- Export to Excel:

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  - Enable export using dossier chapter filters.
- Keyboard shortcuts for improved accessibility on the Attribute Element Prompt dialog.
- Manage user access of all objects in Library, including when sharing dossiers, documents, and reports.

MicroStrategy Workstation

This is the last release before the retirement of MicroStrategy Workstation for Mac. Support for security and services updates on Workstation for Mac will remain available until June 2024. See Mac Workstation Client End-of-Life Announcement for more information.

MicroStrategy AI

Expose and manage standalone AI bots.

Dossier

- The new data import experience is available out-of-the-box. The new experience includes an organized data source tree that lists all available data sources, a centralized table canvas and powerful search functionality, enabling users to navigate, import, and manage data from multiple sources using a streamlined experience.
- Calendar based reporting.
- Display totals and subtotals on stacked bar charts.
- Conditionally display text boxes, image, and shapes in dossiers.
- Enable data comparison, dynamic conditions, and what-if analysis using parameters.

Administration

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- Add or remove servers from a cluster environment and enable servers for cluster start up.
- Access and monitor MicroStrategy licenses to register new licenses and activate or deactivate existing licenses.
- Configure panels in Library to be pinned or docked via applications, including the sidebar, dossier table of contents, filter panel, and comments.
- Create data sources generically with connection strings.
- Enhanced user monitor to visually depict user account status.

MicroStrategy for Office

- Use the MicroStrategy Teams App
- Empower users to seamlessly leverage and reuse prompted answers across diverse prompts while importing content through the intuitive MicroStrategy add-in for Excel, streamlining data analysis and enhancing productivity.

MicroStrategy Platform Analytics

- Expanded Auto Adoption: Platform Analytics now captures object (dossier or bot) information (for example, description, ID, or modification date) linked to every AI-related question submitted by a user
- Improved out-of-the-box dossier: The newly captured information was added to the Auto Adoption dossier. Authors can measure adoption of owned content based on the number of questions asked.

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MicroStrategy Library Mobile SDK

iOS

When you customize Strategy Library Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.

Android

Android Push Notifications with Firebase Cloud Messaging (FCM):

- Upgraded Firebase Cloud Messaging (FCM) API to the new HTTP V1 version, enhancing performance, reliability, and security of push notifications. For Out-of-the-Box (OOTB) Android push notification devices, this migration is seamless, requiring no user action.
- For custom MicroStrategy Android apps, see Enable Push Notifications in Android to update your configuration.

MicroStrategy Mobile SDK

iOS

When you customize Strategy Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.

Android

Android Push Notifications with Firebase Cloud Messaging (FCM):

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- Upgraded Firebase Cloud Messaging (FCM) API to the new HTTP V1 version, enhancing performance, reliability, and security of push notifications. For Out-of-the-Box (OOTB) Android push notification devices, this migration is seamless, requiring no user action.
- For custom MicroStrategy Android apps, see Enable Push Notifications in Android to update your configuration.

MicroStrategy Packages for Python (mstrio-py)

New Features

- Changed `list_users` to allow filtering on the `enabled` field.
- Added support for `ldapdn`, `language`, `owner`, and `default_timezone` for `Users`.
- Added support for `ldapdn` for `UserGroups`.
- Added `add_datasource()` and `remove_datasource()` methods to the `Project` class to allow the addition and removal of data sources from the project.
- Added `data_language_settings` and `metadata_language_settings` properties to the `Project` class to allow interacting with project internalization:
  - Added `add_language()`, `alter_language()`, `remove_language()`, `alter_current_mode()`, `alter_default_language()` methods for the `data_language_settings` property.
  - Added `add_language()` and `remove_language()` for the `metadata_language_settings` property.
- Added a new optional `show_description` argument to `ProjectSettings.list_properties()`, `ProjectSettings.to_csv()`, `ServerSettings.list_properties()`, and

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`ServerSettings.to_csv()` to show descriptions for each setting.

- Added `Enums` in `mstrio.server.setting_types` to allow altering `Enum` settings by providing `Enum` values instead of `string`.

Minor Changes

- Updated code snippets for data sources to use the `Language` class and `list_languages` function from the `mstrio.server.language` package instead of the `Locale` class and `list_locales` function.
- Members in user groups are now instances of the `User` or `UserGroup` class, instead of dictionaries.
- Addresses in the `User` class are now instances of the `Address` class, instead of dictionaries.

Deprecated

The ability to provide `initials` as a filter in `list_users` is deprecated and will be removed in the future.

Removed

- Removed the `Locale` class and `list_locales` function from the `mstrio.datasources.datasource_map` module.
- Removed the `update()` method from the `OlapCube` class.
- Removed the `mstrio.api.exceptions` and `mstrio.helpers.exceptions` modules.
- Removed the `overwrite`, `attributes`, and `metrics` parameters from the `OlapCube.create()` method.
- Removed the ability to pass an instance of the `Locale` class as an argument in the `mstrio.datasources.datasource_map` module.

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MicroStrategy Embedding SDK

There is a new API to embed a bot consumption page. Some UI customizations can be made as well.

Federated Analytics

The MicroStrategy for QlikView and MicroStrategy for Qlik Sense connectors deployed from prior versions no longer connect to the Intelligence server. See KB486119 for more information.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Gateway changes
  - The following SaaS gateways leverage ODBC instead of JDBC: Square, Shopify, ServiceNow, Paypal, Marketo, Hubspot, Eloqua, and Concur. Upon upgrade, existing connections are automatically modified to the new out-of-the-box ODBC-based connectors.
  - The MapR Drill connector has been deprecated and retired.
- Out-of-the-box driver updates

  Ensure security and reliability by supporting OpenSSL 3.x and other security updates for the following drivers:
  - SQL Server
  - Postgres SQL
  - Google Big Query

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MicroStrategy ONE - Update 11 (November 2023)

MicroStrategy Library Mobile SDK

iOS

Use Intune MAM AppConfig with Intune Integrated iOS Library SDK.

MicroStrategy ONE - Update 11 Patch 1 (October 2023)

This release includes remediations for CVE-2023-4863 and CVE-2023-5217 by upgrading libwebp and libvpx to safe versions.

MicroStrategy ONE - Update 11 (September 2023)

MicroStrategy Library

Auto

- Use Auto Dashboard to create dossier pages with visualizations.
- Use Auto Answers to self serve insights.
- Turn historical data into actionable predictions. Unlock future insights with time series forecasting.
- Chart your growth trajectory. Uncover clear patterns with time series linear trend analysis.
- Elevate decision-making and understand the dominant factors influencing specific outcomes with key driver analysis.
- Enable and disable Auto at the dossier-level.

Dossier

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- Discover content via folder browsing. This former preview feature is available out-of-the-box.
- Enable or disable the passing of selected objects to the target page with contextual linking.
- Copy and paste visualization formatting.
- Link to a dossier in a different project.
- New Transactions tab added to the Format panel for dossier transaction grids.
- Create thresholds on each visual component of Multi-Metric KPIs and Comparison KPIs. Thresholds can be duplicated within a single visualization. Thresholds can be based on the following:
  - Value
  - Rank
  - Increasing/Decreasing trend
- View your library in a customizable list view.
- More granular controls for applications.
- Export to PDF enhancements:
  - Expanded PDF paper size export options.
  - Use the Dossier Properties dialog to define a default paper size and orientation when exporting a dossier to PDF.

Administration

Check the Modeling services IP and port using the Library log file.

MicroStrategy Workstation

Auto

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- Enable and disable Auto on the project-level, application-level, and dossier-level.
- Use Auto Dashboard to create dossier pages with visualizations.
- Turn historical data into actionable predictions. Unlock future insights with time series forecasting.
- Chart your growth trajectory. Uncover clear patterns with time series linear trend analysis.
- Elevate decision-making and understand the dominant factors influencing specific outcomes with key driver analysis.
- Use Auto SQL to create Freeform SQL tables. This former preview feature is available out-of-the-box.

Dossier

- Users can create data sources and access context menu options using the new data import experience, instead of contacting the administrator to do so.
- Link to a dossier in a different project.
- Enable or disable the passing of selected objects to the target page with contextual linking.
- Copy and paste visualization formatting.
- New Transactions tab added to the Format panel for dossier transaction grids.
- Create thresholds on each visual component of Multi-Metric KPIs and Comparison KPIs. Thresholds can be duplicated within a single visualization. Thresholds can be based on the following:

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- Value
- Rank
- Increasing/Decreasing trend

Administration

- Reduce cube file size by up to 50% using cache compression. This former preview feature is available out-of-the-box.
- Create security filters based on relational sources for live and in-memory analytics. This former preview feature is available out-of-the-box.
- Browse folder structure using content discovery in Library. This former preview feature is available out-of-the-box.
- Manage Library subscriptions.
- Allow parallel execution of burst subscriptions to improve performance on both single node, as well as clustered Intelligence server environments.
- Configure allowed URLs for data import.
- Support for warehouse partition mapping and metadata partition mapping.
- Use an existing package to edit and recreate a migration package.
- Change the Workstation interface language in Windows. This feature enables users to switch languages on demand, without changing the Windows language.
- There is a new option to enable HTTP Strict Transport Security (HSTS) for the MicroStrategy Modeling service.
- Check the available Modeling services.
- Edit custom language objects to specify their default interface language in Workstation.
- More granular controls for applications.

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- Configure the logo and color theme of Library via the application's Appearance Editor. This feature is now also applicable to Library Mobile for iOS and Android.
- Data Source Management:
  - Create data sources against Amazon Athena
  - Configure OIDC single-sign-on Databricks
  - Create Python data sources

MicroStrategy Library Mobile

iOS

- Supports iOS 17.
- Discover content via folder browsing.
- Configure the color theme via applications.
- Link to a dossier stored in a different project from images or text
- Passing the selected objects when linking from a visualization can be disabled.
- Support line breaks in transactional grids.
- More granular controls in applications.

Android

- Discover content via folder browsing.
- Configure the color theme via applications.
- Link to a dossier stored in a different project from images or text

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- Passing the selected objects when linking from a visualization can be disabled.
- Support line breaks in transactional grids.
- More granular controls in applications.

MicroStrategy Mobile

iOS

Supports iOS 17.

MicroStrategy for Office

Import visualizations from MicroStrategy to PowerPoint

MicroStrategy Intelligence Server

- Reduce cube file size by up to 50% using cache compression. This former preview feature is available out-of-the-box.

MicroStrategy REST APIs

- Manage cluster startup membership configuration.
- Update a table's physical structure.

MicroStrategy Packages for Python (mstrio-py)

New Features

- Added support for metric object VLDB properties by providing `list_vldb_settings`, `reset_vldb_settings`, and `alter_vldb_settings` methods, as well as a `vldb_settings` attribute.

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- Added a refresh argument to `list_datasource_warehouse_tables` to allow the refreshing of available warehouse tables in a data source.
- Enhanced the `update_physical_table_structure` and `update_physical_table_structure_for_all_tables` methods of `LogicalTable` to work after changing `WarehouseTable` structure.
- Added a `Translation` class to the `mstrio.object_management.translation` package to allow the management of translations for any object with the following methods: `add_translation`, `alter_translation`, `remove_translation`, `to_csv_from_list`, and `add_translations_from_csv`.
- Added `list_translations` to allow listing translations for objects.
- Added `add_translation`, `alter_translation`, `remove_translation`, and `list_translations` methods to all objects inheriting from Entity to allow translation management directly through the objects.

Minor Changes

Moved `Rights`, `AggregatedRights`, and `Permissions` enums to the `mstrio.helpers` module.

Removed

Removed `list_folders`, `create_folder`, and `delete_folder` from `mstrio.utils.helper` because they have been superseded by the `mstrio.object_management.folder` module.

MicroStrategy Embedding SDK

Event handlers have been added to Library for item and menu selection.

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Federated Analytics

This is the last release in which the MicroStrategy for QlikView and MicroStrategy for Qlik Sense connectors are available on the download site. See KB486119 for more information.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Gateway Certifications:
  - Google Analytics v4
  - SAP Datasphere
- New Gateway Single Sign-On Certifications:
  - Support OIDC SSO with Generic Identity Provider
  - OIDC authentication for Azure Databricks with Azure AD
  - Enable OIDC Authentication with AWS Databricks Using Databricks Identity Provider
- Gateway Enhancements:
  - Certify and support for temporary tables for Google BigQuery
  - Support for the Push Down function Product and GeoMean for GoogleBigQuery
- Ensure security and reliability by supporting openssl 3.x with the following updated drivers:
  - Redshift ODBC driver

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- Oracle ODBC driver
- IBM DB2 ODBC Driver

Privileges

See Privileges by License Type for information about license types and associated privileges.

The Use Auto Assistant and ML Visualizations privilege has been added to the Server - Reporter license.

MicroStrategy ONE - Update 10 (August 2023)

MicroStrategy Workstation

Create IAM objects with a generic OAuth type.

MicroStrategy Packages for Python (mstrio-py)

New Features

- Added the `delete()` method to the `Project` class to allow the deletion of projects.
- Added the `hidden` parameter to create methods of `Attribute` and `Metric` classes.

Minor Changes

Renamed `ObjectTypes.NONE` to `ObjectTypes.NOT_SUPPORTED` in the `mstrio.types` module.

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MicroStrategy Library Mobile

iOS

Supports iOS 17 and iPadOS 17. See MicroStrategy Mobile and MicroStrategy Library Apps crash on iPadOS & iOS 17 for more information.

MicroStrategy Mobile

iOS

Supports iOS 17 and iPadOS 17. See MicroStrategy Mobile and MicroStrategy Library Apps crash on iPadOS & iOS 17 for more information.

MicroStrategy ONE - Update 10 (July 2023)

MicroStrategy Workstation

Enable Analytics Architects to view fact extensions in the fact editor.

MicroStrategy Library

Edit header and footer text when exporting a report to Excel.

MicroStrategy Packages for Python (mstrio-py)

Major changes

- Added the `Language` class in the `mstrio.server.language` package to allow management of Languages
- Added `list_languages` and `list_interface_languages` to allow the listing of languages and interface languages

Deprecated

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- The `Locale` class in `mstrio.datasources` is no longer supported and is superseded by the `Language` class in the `mstrio.server.language` package
- The `list_locales` function in `mstrio.datasources` is no longer supported and is superseded by the `list_languages` function in the `mstrio.server.language` package

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MicroStrategy ONE - Update 10 (June 2023)

MicroStrategy Workstation

- *Preview Feature*: Use artificial intelligence (AI) when creating Freeform SQL tables.
- *Preview Feature*: Use artificial intelligence (AI) for dataset analysis in Library.
- *Preview Feature*: Create security filters based on relational sources for live and in-memory analytics.
- *Preview Feature*: Reduce cube file size by up to 50% using cache compression.
- *Preview Feature*: Browse folder structure using content discovery in Library.
- Support oAuth On-behalf-of authentication mode for Snowflake against Okta. This former preview feature is available out-of-the-box.
- Enable Administrator and Analyst personas to deliver content to mobile devices with mobile subscriptions. This is an extension of subscription management, now enabling the ability to send content directly to mobile devices.
- Define reusable dossier themes.

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- Configure the logo and color theme of Library Web via the application's Appearance Editor. Color preferences now apply to collaboration, MicroStrategy Insights, subscriptions and search interfaces, as well as the table of contents.
- Add reports to a content group.
- SharePoint Lists allow you to import any list from SharePoint.
- Enable single logout with OIDC authentication.
- Improve project loading and schema update performance by optimizing Intelligent cubes processing for dynamic sourcing.
- Data Source Management:
  - Create data sources against Amazon Athena
  - Configure OIDC single-sign-on authentication to Snowflake and Amazon Athena Using Okta and Azure AD

MicroStrategy Library

- *Preview Feature*: Use artificial intelligence (AI) for dataset analysis.
- *Preview Feature*: Discover content via folder browsing.
- Content groups can view and create new application content.
- Dossier authoring enhancements:
  - A **Special** number format has been added for attributes. It can be modified at the dataset level and within modern grids. This allows the formatting of numbers such as zip codes, phone numbers, and social security numbers.
  - Modern grids have enhanced border formatting options that allow you to set specific borders (top, bottom, left, right) for each column set.
  - Apply a theme to your dossier.

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MicroStrategy Library Mobile

iOS

Dossier transaction grids have an input control "switch" so users can add and modify data. The switch uses a toggle or checkbox style. Both styles support on/off/unset states in data modification mode and on/off for data insertion mode.

Android

- Dossier transaction grids have an input control "switch" so users can add and modify data. The switch uses a toggle or checkbox style. Both styles support on/off/unset states in data modification mode and on/off for data insertion mode.
- Dynamically switch between time zones for your data.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

- Updated the `create` method of the `OlapCube` class to support the following new parameters: `template`, `filter`, `options`, `advanced_properties`, `time_based_settings`, `show_expression_as`, and `show_filter_tokens`.
- Updated the `alter` method of the `OlapCube` class to allow altering of the following new parameters: `template`, `filter`, `options`, and `time_based_`settings.
- Added `set_partition_attribute`, `remove_partition_attribute` and `list_attribute_forms` methods to the `OlapCube` class to allow management of partition attribute and observing attributes forms.

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- Added `list_vldb_settings`, `alter_vldb_settings` and `reset_vldb_settings` methods to the `OlapCube` class to allow management of VLDB settings.

Deprecated

- The update method of the `OlapCube` class is no longer supported. It is superseded by the `alter` method and will be removed in the future.
- The `attributes`, `metrics` and `overwrite` parameters in the `create` method of the `OlapCube` class are no longer supported. They are superseded by the `template` parameter and will be removed in the future.

MicroStrategy REST APIs

- Retrieve, create, and update KPI objects and insights.
- Change the owner of an object.
- Create a dossier in memory based on a list of objects.
- Retrieve a list of documents.
- Retrieve the hierarchy of a document.
- Enhancements for folder browsing

MicroStrategy Cloud Platform

- MicroStrategy Backup and Restore unlocks all projects that were previously locked after the restore process.
- Support for Amazon Linux 2023 and RHEL 8.6
- New Spain region for AWS
- One Click Upgrade includes a Tomcat upgrade.

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Intelligence Server

Preview Feature: Reduce cube file size by up to 50% using cache compression.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Gateway Certifications
  - Certify Sharepoint Lists as an out-of-the-box gateway in Workstation's new data import experience
  - Support XML format for file uploads in the data import workflow
  - IBM Z/OS v12
- New Gateway Single Sign-On Certifications:
  - OIDC single sign-on to Snowflake with Okta
  - OIDC single sign-on to Amazon Athena with Okta and Azure AD
- OOTB Driver Updates

  Ensure security and reliability with the following updated drivers:
  - IBM DB2 ODBC Driver
  - MicroStrategy Driver Manager Files
  - Teradata ODBC Driver
  - Exasol ODBC Driver

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Upgrade

The MicroStrategy Repository is an embedded PostgreSQL repository that supports the storage of Collaboration Server, Platform Analytics, and the Storage Service. In MicroStrategy ONE Update 10, the embedded PostgreSQL version is upgraded from v 11.x to 14.7. To learn more, see MicroStrategy Repository Upgrade.

Installation

The Korn Shell (KSH package) is not required to launch setup. Bash shell is used by default.

2021 Update 9 (May 2023)

MicroStrategy Workstation

- Create datamart objects. This former preview feature is available out-of-the-box.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

- Added `list_vldb_settings`, `alter_vldb_settings`, and `reset_vldb_settings` methods to the `DatasourceInstance` and `Project` classes to allow management of VLDB settings.
- Added a `Driver` class and `list_drivers` function in the `mstrio.datasources.driver` module to allow driver management.
- Added a `Gateway` class and `list_gateways` function in the `mstrio.datasources.gateways` module, as well as `GatewayType` and `DBType` enums in `mstrio.datasources.helpers` to allow gateway management.

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Minor Changes

- Updated `ipython` dependency version to 8.10.0.
- Added a `project_id` property for `Metric` instances.
- Added a `delivery_expiration_timezone` argument for the `Subscription` class and its subclasses. This functionality will be supported in a future release.
- Added `SuperCubeAttribute`, `SuperCubeAttributeForm`, and `SuperCubeFormExpression` classes in the `mstrio.project_objects.datasets.super_cube` module to support attribute forms for `SuperCube`.

MicroStrategy Embedding SDK

Native Embedding SDK

- You can use the Native Embedding SDK to embed visualizations from separate containers to improve performance.
- Users can interact with the embedded visualization.
- Users can use APIs to perform manipulations such as filtering.

2021 Update 9 (April 2023)

MicroStrategy HyperIntelligence

All HyperIntelligence products were updated for consistent refresh data behavior in card properties.

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2021 Update 9 (March 2023)

MicroStrategy Workstation

- *Preview Feature*: Create datamart objects.
- *Preview Feature*: Support oAuth On-behalf-of authentication mode for Snowflake against Okta.
- Administrators can specify different default authentication modes per application to customize the login experience in Library for end users. This former preview feature is available out-of-the-box.
- Create data sources to Palantir Foundry. This former preview feature is available out-of-the-box. The corresponding driver is shipped with Workstation.
- Improved data source management.
- The server-level security setting, Allow lockout duration (Minutes), allows administrators to set the amount of time (in minutes) to lock an account after a user fails to log in a certain amount of times.
- Administrators can restore all password security settings back to the default with one click.
- Secure users and user groups access with ACLs to control who can view, modify, or delete them.
- Administrators can allow business users of an application to create, search for, and view new content in their library when content groups are associated with the application. See Manage Content Groups for more information.
- Administrators can configure linking between environments via applications and enable users in Library Web to switch between environments using the new Switch Workspace option under the Account

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menu.

- Expanded time zone based reporting to additional gateways and optimized background performance, including the option to delete unused system calendars.
- Configure smart attribute formatting at the dossier level. Exporting services feature all supported languages.
- Edit migration packages.
- Edit transactional reports.
- Create Intelligent cube reports.
- The history list monitor allows you to view history list messages for all users, as well as detailed information for each message.
- Configure the logo and color theme of Library Web via the application's Appearance Editor.
- Dossier transaction grids have an input control "switch" so users can add and modify data. The switch uses a toggle or checkbox style. Both styles support on/off/unset states in data modification mode and on/off for data insertion mode.
- Selections in visualization (in-canvas) filters can be matched between source and target dossier pages with contextual linking. See Use a Visualization to Filter Data in a Different Dossier and Link a Text Field or Image to a Dossier for more information.
- Filter selectors can be configured to automatically update by either clearing or by resetting to a dynamic first/last N element selection to avoid returning no data due to mutually exclusive selections. See Create a Visualization Filter for more information.
- Filters configured with a dynamic last/first N element selection can be configured to prevent consumers from clearing (unsetting) them. This

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enforces a selection and avoids large amounts of data being returned. See Create a Default Dynamic Selection Filter for more information.

MicroStrategy Library

- *Preview Feature:* Enable a Filter panel for report consumption in Library Web.
- Selections in visualization (in-canvas) filters can be matched between source and target dossier pages with contextual linking. See Use a Visualization to Filter Data in a Different Dossier and Link a Text Field or Image to a Dossier for more information.
- Filter selectors can be configured to automatically update by either clearing or by resetting to a dynamic first/last N element selection to avoid returning no data due to mutually exclusive selections. See Create a Visualization Filter for more information.
- Filters configured with a dynamic last/first N element selection can be configured to prevent consumers from clearing (unsetting) them. This enforces a selection and avoids large amounts of data being returned. See Create a Default Dynamic Selection Filter for more information.
- Dossier transaction grids have an input control "switch" so users can add and modify data. The switch uses a toggle or checkbox style. Both styles support on/off/unset states in data modification mode and on/off for data insertion mode.
- Administrators can allow business users of an application to create, search for, and view new content in their library when content groups are associated with the application.

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MicroStrategy Library Mobile

iOS

- MicroStrategy Insights are supported. Review insightful data changes on-the-go.
- Selections in visualization (in-canvas) filters can be matched between source and target dossier pages with contextual linking. See Use a Visualization to Filter Data in a Different Dossier and Link a Text Field or Image to a Dossier for more information
- Filter selectors can be configured to automatically update by either clearing or by resetting to a dynamic first/last N element selection to avoid returning no data due to mutually exclusive selections. See Create a Visualization Filter for more information.
- Filters configured with a dynamic last/first N element selection can be configured to prevent consumers from clearing (unsetting) them. This enforces a selection and avoids large amounts of data being returned. See Create a Default Dynamic Selection Filter for more information.
- Administrators can allow business users of an application to create, search for, and view new content in their library when content groups are associated with the application.

Android

- MicroStrategy Insights are supported. Review insightful data changes on-the-go.
- Selections in visualization (in-canvas) filters can be matched between source and target dossier pages with contextual linking. See Use a Visualization to Filter Data in a Different Dossier and Link a Text Field or

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Image to a Dossier for more information.

- Filter selectors can be configured to automatically update by either clearing or by resetting to a dynamic first/last N element selection to avoid returning no data due to mutually exclusive selections. See Create a Visualization Filter for more information.
- Filters configured with a dynamic last/first N element selection can be configured to prevent consumers from clearing (unsetting) them. This enforces a selection and avoids large amounts of data being returned. See Create a Default Dynamic Selection Filter for more information.
- Administrators can allow business users of an application to create, search for, and view new content in their library when content groups are associated with the application.

MicroStrategy Platform Analytics

Client telemetry offers a realm of insightful data. This former preview feature is available out-of-the-box.

- Developers/BI Architects can discover consumption patterns of a dossier such as page clicks, time elapsed, and so on.
- Administrators can monitor end-to-end performance of the platform, including client-side rendering times.
- Starting in MicroStrategy 2021 Update 9, a new out-of-the-box dossier showcases this feature's new capabilities.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

- Added `HistoryListSubscription`, `FTPSubscription`, and `FileSubscription` classes in the `mstrio.distribution_`

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services.subscription package to allow management of history list, FTP, and file subscriptions.

- Added a DynamicRecipientList class in the mstrio_distribution_services.subscription package to allow management of dynamic recipient lists.
- Added list_dynamic_recipient_lists to allow the listing of dynamic recipient lists.

Minor Changes

- Added verification when initializing the Report object, if the object is supported. Currently, objects with the following subtypes are supported: 768 - grid, 769 - graph 769, 770 - engine, 774 - grid and graph, 778 - transaction, and 781 - hyper card.
- Changed the list_reports function to return objects only supported by the Report class.
- Added methods to convert connections from DSN to DSN-less format in the DatasourceInstance and DatasourceConnection classes.
- Improved error messages when calling list_dependents and list_dependencies on unsupported objects.
- Added support for the Time type to SuperCube class.
- Added with statement compatibility for Connection object.
- Added a find_objects_with_id function in mstrio.object_management.search_operations to allow searching for an object when knowing only its ID.
- Added checking during creation to see if a SuperCube with given name already exists in a folder and displays an error if it does.
- Added support for Python 3.11

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- Altered the `attributes.py` code snippet to use the `list_table_columns` and `list_logical_tables` methods from the `table` module.
- Updated dependencies in `requirements.txt`.
- Combined the `_update_acl` and `_modify_rights` methods. Added a `modify_rights` method.
- Added `Service` and `ServiceWithNode` classes in the `mstrio.server.node` module.

MicroStrategy Library Mobile SDK

iOS

- Supports Intune native EMM SDK for iOS 16.
- Supports native integrated Intune SDK for Xcode 14.

MicroStrategy REST APIs

- Retrieve gateway objects.
- Retrieve and update driver objects.
- Retrieve applicable properties for metrics.
- Execute a datamart.
- Set advanced properties for attributes.
- Retrieve, create, and update warehouse/metadata partition mapping tables.
- Apply custom logo and colors to Library.
- Manage mobile subscriptions.
- Edit migrations and migration groups.

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Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

- Gateway Certifications
  Create connections and run analytics with optimized SQL against the following new gateways:
  - SQL Server 2022
  - PostgreSQL 15
  - Teradata VantageCloud Lake
  - Unity Catalog for Databricks
  - Palantir Foundry
  - Dremio
- OOTB Driver Updates
  Ensure security and reliability with the following updated drivers:
  - Denodo JDBC driver is out-of-the-box
  - Palantir Foundry driver is out-of-the-box
  - Snowflake ODBC driver upgraded to 2.25.7
  - Drill JDBC driver upgraded to 1.6.12.1009
  - SQL Server ODBC driver upgraded to 08.02.1081
- Improved enterprise security with extended data source single-sign-on authentication support using Open ID Connect and oAuth:
  - Support oAuth On-Behalf-Of authentication mode for Google BigQuery against Azure AD through Google's Workforce Identity Federation.

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- *Preview Feature*: Support oAuth On-behalf-of authentication mode for Snowflake against Okta.

- Improved data source management in Workstation:
  - Convert DSN-based data sources to DSN-less through Workstation and Python for self-service data source definition in on-prem or cloud environments.
  - A new tab under Data Sources for gateway and driver management. Here you can disable or enable drivers and gateways to limit users' access to them based on enterprise policy.
  - Create and edit data sources for PayPal, Shopify, Marketo, HubSpot, ServiceNow, and Square SaaS gateways.
  - Create and edit data sources against the new Dremio and Palantir Foundry gateways.

Upgrades

During upgrades, the platform installer automatically backs up integral configuration files that can be manually updated by a user; therefore, automating a key manual pre-upgrade step.

2021 Update 8 (February 2023)

MicroStrategy Workstation

Create dynamic address lists to dynamically source the recipients list for subscription delivery.

MicroStrategy Embedding SDK

Embed MicroStrategy Report page.

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- Users can embed MicroStrategy Report consumption page.
- Users can control the visibility of the navigation bar of the Report consumption page.

2021 Update 8 (January 2023)

The January 2023 release includes defect fixes for stability and user experience.

2021 Update 8 (December 2022)

MicroStrategy Workstation

- *Preview Feature:* Administrators can specify different default authentication modes per application to customize the login experience in Library for end users.
- *Preview Feature:* Create data sources to Palantir Foundry. Manual driver deployment is required.
- Monitor content caches in the Cache Monitor. This former preview feature is available out-of-the-box.
- Administrators can configure the contents, logo and URLs of the notification emails that users get when sharing content and using collaboration in Library. This former preview feature is available out-of-the-box.
- Create and edit reports with your favorite features including the Advanced Properties panel, View Filters, SQL View, and many more. This former preview feature is available out-of-the-box.
- Time zone based reporting. This former preview feature is available out-of-the-box.

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  - Create, edit, delete, and view internationalization objects.
  - Set a project's default time zone.
  - Assign user's default time zone and language.
  - Seamlessly create new time hierarchies with smart attributes.
  - Use a language object to customize smart attribute formatting.
- Localize your metadata objects for all the languages supported by your project.
- Administrators can set default authentication for Library Web.
- Administrators can duplicate user accounts.
- Administrators can delete projects.
- The FreeForm SQL Report Editor allows you to write your own queries to create reports. This former preview feature is available out-of-the-box.
- Define templates for creation of new dossiers.
- For data sources and projects, manage advanced properties for null handling, SQL generation, evaluation order, query optimization, joins, and more.
- Certify migration packages.
- Clear the object and element cache from server memory.
- Monitor and manage quick search indices to re-build them and configure the index directory.
- In dossiers, the same information window can be targeted by two or more visualizations in the page for reusability.

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MicroStrategy Web

All Flash entry points in documents have been removed. See KB485844 for more information.

MicroStrategy Library

- MicroStrategy Insights allow users to select key business KPIs from their dossiers and track them all from a single page in Library. Based on the KPIs users track, MicroStrategy helps bring trends and outliers to the surface, as well as alert users with in-app and email notifications.
- Time zone reporting. This former preview feature is available out-of-the-box.
  - Dynamically switch between time zones for your data.
  - Select a preferred time zone for users.
  - Select preferred formatting for smart attributes with a language object. This setting allows you to switch the Library user interface languages as well, if it is one supported out of the box.
- The Report Editor comes to Library. Create and edit reports with your favorite features including the Advanced Properties panel, View Filters, SQL View, and many more. This former preview feature is available out-of-the-box.
- Set default authentication for Library Web using the Library server config file.
- Define templates for creation of new dossiers.
- In dossiers, the same information window can be targeted by two or more visualizations in the page for reusability.

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MicroStrategy Library Mobile

iOS

- Undo or redo dossier manipulations such as filtering, drilling, and sorting.
- Supports Intune native EMM SDK for iOS 16.

MicroStrategy Platform Analytics

Preview Feature: Client telemetry offers a realm of insightful data:

- Developers/BI Architects can discover consumption patterns of a dossier such as page clicks, time elapsed, and so on.
- Administrators can monitor end-to-end performance of the platform, including client-side rendering times.

MicroStrategy Library Mobile SDK

iOS

- Supports MobileIron, AirWatch, and BlackBerry Dynamics SDKs with Xcode 14.
- When you customize MicroStrategy Library Mobile SDK for iOS, you must have an Apple Mac with Monterey 12.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 14.1 with the Apple iOS SDK 16.1, to develop and compile your application.

MicroStrategy Mobile SDK

iOS

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- Supports MobileIron, AirWatch, and BlackBerry Dynamics SDKs with Xcode 14.
- When you customize MicroStrategy Mobile SDK for iOS, you must have an Apple Mac with Monterey 12.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 14.1 with the Apple iOS SDK 16.1, to develop and compile your application.

MicroStrategy Web SDK

Several APIs have been removed.

MicroStrategy Embedding SDK

- Ability to customize dossier pages from embedding Library home page.
- Ability to customize Library home page from embedding dossier page.

MicroStrategy REST APIs

- Purge object and element caches.
- Delete a project in the project administration workflow.
- Retrieve, create, and update transaction report objects.
- Manage application customized emails.
- Advanced properties for database instances.
- Advanced properties for projects.
- Convert connection string from data source name (DSN) to DSN-less for a data source.
- Manage Watch KPI and Insight service privileges.

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Data Sources

- Create and manage data sources in Workstation for the following SaaS sources:
  - Dropbox
  - Google Analytics
  - Google Drive
  - SAP oData Gateways
  - Salesforce Reports
  - Twitter
- Create and manage data sources in Workstation through DSN-less and guided connection definitions to the following additional sources:
  - Azure SQL Database
  - IBM DB2
  - MariaDB
  - MySQL
  - SingleStore
  - Sybase
  - Tibco Data Virtualization
  - Vertica
- Configure OAuth for SAP HANA single-sign-on pass-through authentication.
- Import data from OneDrive and Box using the new data import experience.
- Create connections and run analytics with optimized SQL against Trino.

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2021 Update 7 (November 2022)

MicroStrategy Library

Export Report Services documents to Excel.

MicroStrategy Packages for Python (mstrio-py)

There are two new Python modules for documents and dossiers. Check out this video to learn more.

2021 Update 7 (October 2022)

MicroStrategy Workstation

- *Preview Feature:* Monitor content caches in the Cache Monitor.
- Subscribe and deliver content with file subscriptions.
- Create user and subscription fences to reserve nodes of a cluster environment with fencing.
- Configure OAuth authentication for Google BigQuery data sources.
- Embedded surveys have been removed.

MicroStrategy Library

Embedded surveys have been removed.

MicroStrategy Web

Embedded surveys have been removed.

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MicroStrategy REST APIs

- Duplicate users.
- Manage quick search indices.

2021 Update 7 (September 2022)

MicroStrategy Workstation

- *Preview Feature:* Create and edit reports with your favorite features including the Advanced Properties panel, View Filters, SQL View, and many more.
- *Preview Feature:* The FreeForm SQL Report Editor allows you to write your own queries to create reports.
- *Preview Feature:* A new data import experience with enhanced data source catalog browsing and multi-source data import workflow.
- *Preview Feature:* Configure the logo, links, and content of the notification email when sharing.
- Move objects between environments using migration packages. This former preview feature is available out-of-the-box.
- Enterprise Security allows the management of Identity and Access management (IAM) objects that encapsulate oAuth profiles that can be used to configure gateways to support OAuth authentication.
- Control advanced properties for incremental refresh reports. Configure metric aggregations, null handling, indexing, and more.
- Manage advanced LDAP settings. See KB485644 and KB485645 for more information.

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- The certification symbol for certified dossiers appears in the Content Groups and Applications Editors.

MicroStrategy Library

- *Preview Feature:* The Report Editor comes to Library. Create and edit reports with your favorite features including the Advanced Properties panel, View Filters, SQL View, and many more.
- *Preview Feature:* Support OAuth authentication against OAuth-enabled gateways for live connected dossier and report executions.
- Improved color contrast with a more accessible primary blue and overall color palette.

MicroStrategy Library Mobile

iOS

- *Preview Feature:* Supports OAuth authentication against OAuth-enabled gateways for live connected dossier executions.
- Enhanced iOS 16 and iPadOS 16 compatibility to provide more stable upgrades.
- Improved color contrast with a more accessible primary blue and overall color palette.

Android

Enhanced dossier viewing experience with the ability to undo and redo basic operations such as filtering, drilling, sorting, and so on.

MicroStrategy Mobile

iOS

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Enhanced iOS 16 and iPadOS 16 compatibility to provide more stable upgrades.

MicroStrategy Library Mobile SDK

Android

The MicroStrategy Library Mobile SDK for Android is certified to work with Android 13 (API level 33). When you customize MicroStrategy Library Mobile SDK for Android, you must have Android SDK 33 to develop and compile your application. Android Studio Chipmunk and newer is supported.

MicroStrategy Mobile SDK

Android

The MicroStrategy Mobile SDK for Android is certified to work with Android 13 (API level 33). When you customize MicroStrategy Mobile SDK for Android, you must have Android SDK 33 to develop and compile your application. Android Studio Chipmunk and newer is supported.

MicroStrategy Embedding SDK

- The MicroStrategy Embedding SDK help has been moved to GitHub Pages. This allows easier collaboration from the developer community. The new help site has improved page navigation, cleaner design, instant search, and also supports dark mode.
- Embed the MicroStrategy Library home page.
  - Users can also embed any child page accessed from the sidebar, including subscriptions, etc.

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- Control the visibility of the navigation bar and sidebar of the MicroStrategy Library home page.

MicroStrategy REST APIs

The MicroStrategy REST API help has been moved to GitHub Pages This allows easier collaboration from the developer community. The new help site has improved page navigation, cleaner design, instant search, and also supports dark mode.

The MicroStrategy REST API Explorer still remains on the demo site. In addition, we have also released a new REST API Playground.

- Move object migration groups between environments.
- Upload and download migration packages.
- Retrieve, create, and update datamart objects.
- Retrieve, create, and update calendar objects.
- Retrieve, create, and update runtime objects.
- Configure and manage dynamic recipient lists for subscriptions
- Create and edit freeform SQL reports.
- Create and modify reports and their advanced properties.
- Ability to translate metadata objects.
- Retrieve, create, and update language objects.

Data Sources

- *Preview Feature:* Library supports OAuth authentication against OAuth-enabled gateways for live connected dossiers and reports.

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- Support for OAuth authentication to Exasol in MicroStrategy Library and data import.
- Support DSN-less data source creation for the following additional gateways: Spanner, AlloyDB, IBM Netezza, IBM NPS, Yellowbrick, and Denodo.
- Case and CaseV Functions are pushed down to the gateway for SingleStore, Vertica, and mongoDB.
- Edit data sources created during data import in Workstation Data Sources management.
- Create connections and run analytics with optimized SQL against Starburst.
- Convert old manual oAuth configurations in data import to new IAM objects for Snowflake and Azure Synapse. See KB485668 for more information.
- Create connections and run analytics with optimized SQL against upcoming Google AlloyDB for PostgreSQL.

2021 Update 6 (August 2022)

MicroStrategy Workstation

- The Intelligent Cube Editor offers control over advanced properties. Configure metric aggregations, null handling, indexing, and more.
- Burst your content for personalized data distribution to multiple recipients dynamically.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

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- Added the `Transformation`, `TransformationAttribute`, and `TransformationAttributeForm` classes in the `mstrio.modeling.schema.transformation` subpackage to allow transformation management.
- Added `list_transformations` to allow listing for transformations.
- Added the `DefaultSubtotals`, `Dimensionality`, `DimensionalityUnit`, `FormatProperty`, `Metric`, `MetricFormat`, and `Threshold` classes in the `mstrio.modeling.metric` subpackage to allow metric management.
- Added `list_metrics` to allow listing for metrics.

Minor Changes

- Added `list_locales` to the `mstrio.datasource.datasource_map` module to allow the listing of locales.
- Added the `DatasourceMap.alter()` method to allow the altering of user-defined connection mapping.
- Added the `list_warehouse_tables()` method to the `mstrio.modeling.schema.table.warehouse_table` module to allow listing of all warehouse tables from all available data sources.

Deprecated

- The `mstrio.distribution_services.contact` module is deprecated and moved to the `mstrio.users_and_groups` subpackage.
- The `mstrio.distribution_services.contact_group` module is deprecated and moved to the `mstrio.users_and_groups` subpackage.
- The `mstrio.access_and_security.security_filter` subpackage is deprecated and replaced by the `mstrio.modeling.security_filter` and `mstrio.modeling.expression` subpackages.

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2021 Update 6 (July 2022)

MicroStrategy Workstation

- Monitor objects changes through the change journal. This former preview feature is available out-of-the-box.
- Create and edit FTP subscriptions.
- Lock and unlock projects and configurations.
- Configure and manage job prioritization to ensure better performance for your high priority users.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

Added a `Filter` class in the `mstrio.modeling.filter` subpackage to allow filter management.

Added `list_filters` to allow listing of filters.

Turned off certificate verification when using `get_connection`.

Minor Changes

Added the ability to pass `project_name`, instead of `project_id`, in functions that allowed only `project_id` in the past.

2021 Update 6 (June 2022)

MicroStrategy Library

- *Preview Feature*: Reports are available for consumption in Library Web! This preview feature allows users to run, favorite, search, and share reports.

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- New transaction grids for dossiers allow you to add, edit, or remove data directly from a relational data source in a dossier. You can configure and even pause this functionality with minimal effort, while keeping the same great look and feel with a simplified workflow.
- Administrators can define a set of color palettes available per application, including defining the application's default palette to apply it automatically during consumption.
- Users can see the list of applications that they have access to and easily switch between them via the Account menu.
- Renamed right-click menu options to clarify the viewing and hiding of containers. **Show/Hide on Mobile** is renamed to **Show/Hide on Responsive View**. **Show/Hide on Canvas** is renamed to **Show/Hide on Default View**.
- Accessible contextual linking from graphs and other visualizations via the Show Data dialog.
- Improvements to accessibility and dossiers including keyboard and screen reader usage.
- 30% faster undo performance in Library consumption.
- Expanded range selection for subscriptions to Excel and PDF files to include chapter and page level selection.
- The graph engine was upgraded as part of our *Strategy Security Assurance Program*. While all efforts are made to minimize impact to graph rendering, there are some noticeable changes to documents as part of this release. KB485520 describes the specific examples where changes may be seen as part of this upgrade.

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MicroStrategy Library Mobile

iOS

- Dossier transaction grids are supported.
- Administrators can define a set of color palettes available per application, including defining the application's default palette to apply it automatically during consumption.

Android

- Dossier transaction grids are supported.
- Administrators can define a set of color palettes available per application, including defining the application's default palette to apply it automatically during consumption.
- Automatically execute a dossier or document after scanning a barcode.

MicroStrategy Workstation

- *Preview Feature*: Reports include support for prompts, page-by, SQL view in execution mode, and drilling.
- *Preview Feature*: Move your content across the platform via migration packages. You can choose to move project-related objects, administration objects, or merge entire projects together. You can also enable monitoring of content movement in the Migrations section of the Workstation window.
- *Preview Feature*: Easily modify the Library logo using the application Appearance Editor.
- New transaction grids for dossiers allow you to add, edit, or remove data directly from a relational data source in a dossier. You can configure and

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even pause this functionality with minimal effort, while keeping the same great look and feel with a simplified workflow.

- Edit and configure customized drill paths.
- Associate a drill map with a consolidation.
- Define and create your own special aggregation rules with custom subtotals.
- Determine the data refresh mechanism for your Intelligent cubes by using incremental refresh reports.
- Accessible contextual linking from graphs and other visualizations via the Show Data dialog.
- Improvements to accessibility and dossiers including keyboard and screen reader usage.
- Renamed right-click menu options to clarify the viewing and hiding of containers. **Show/Hide on Mobile** is renamed to **Show/Hide on Responsive View**. **Show/Hide on Canvas** is renamed to **Show/Hide on Default View**.
- Import SAP HANA calculation views with input parameters into the Modeling schema.
- Configure SameSite cookies for Library via a user interface, instead of manually editing files.
- The graph engine was upgraded as part of our *Strategy Security Assurance Program*. While all efforts are made to minimize impact to graph rendering, there are some noticeable changes to documents as part of this release. KB485520 describes the specific examples where changes may be seen as part of this upgrade.

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MicroStrategy Web

- New authoring features are not implemented in MicroStrategy Web. Please note that users must be on MicroStrategy Library or MicroStrategy Workstation to access all new features starting with this release. Moving forward, new features will no longer be available in MicroStrategy Web. This is to ensure an optimized analytics experience with high performance.
- Renamed right-click menu options to clarify the viewing and hiding of containers. **Show/Hide on Mobile** is renamed to **Show/Hide on Responsive View**. **Show/Hide on Canvas** is renamed to **Show/Hide on Default View**.
- Configure SameSite cookies for MicroStrategy Web and MicroStrategy Mobile via a user interface, instead of manually editing files.
- The graph engine was upgraded as part of our *Strategy Security Assurance Program*. While all efforts are made to minimize impact to graph rendering, there are some noticeable changes to documents as part of this release. KB485520 describes the specific examples where changes may be seen as part of this upgrade.

MicroStrategy Platform Analytics

Improved monitoring and troubleshooting after the Intelligence server crashes by capturing job telemetry during initial job creation.

MicroStrategy Packages for Python (mstrio-py)

Major Changes

- New `LogicalTable`, `PhysicalTable`, and `WarehouseTable` classes in the `mstrio.modeling.schema.table` module to allow table management.

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- New `list_logical_tables()`, `list_physical_tables()`, `list_datasource_warehouse_tables()`, and `list_namespaces()` functions to allow the listing and searching of specific tables in the project.

Minor Changes

- New `search_pattern` and `project_id` parameters in the object listing functions.
- New `move` method added to `Folder`, `Object`, `SecurityFilter`, `Attribute`, `Fact`, `UserHierarchy`, `Report`, `Shortcut`, `SearchObject`, `Document`, and `Dossier` to allow the moving of objects between folders
- Added `create_copy` method in `SecurityFilter`, `Attribute`, `Fact`, `UserHierarchy`, `Report`, `Shortcut`, `SearchObject`, `Document`, and `Dossier`.

Deprecated

The `name_begins` parameter is deprecated in functions listing cubes and reports in favor of the `name` parameter.

See the mstrio-py help for more information.

MicroStrategy Library Mobile SDK

iOS

- Configure a specific application URL as an entry point.
- When you customize MicroStrategy Library Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

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Android

- The Library Mobile SDK for Android is certified to work with Android 12 (API level 31). When you customize MicroStrategy Mobile for Android, you must have Android SDK 31 to develop and compile your application. Android Studio Bumblebee and newer is supported.
- Configure a specific application URL as an entry point.

MicroStrategy Mobile SDK

iOS

When you customize MicroStrategy Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

Android

The MicroStrategy Mobile SDK for Android is certified to work with Android 12 (API level 31). When you customize MicroStrategy Mobile for Android, you must have Android SDK 31 to develop and compile your application. Android Studio Bumblebee and newer is supported.

MicroStrategy Web SDK

Several APIs have been modified.

MicroStrategy REST APIs

- Create and edit user and workload fences.
- Create and edit drill maps.

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- Create and edit Incremental Refresh Reports (IRR).
- Create and manage cube objects with advanced properties.
- Create and manage SAP HANA tables with input parameters.
- Create and import migration packages just as in Workstation. This allows all packages to be managed by the MicroStrategy Storage Service so migration processes can be monitored in Workstation.

Authentication

Support for SAML single logout.

Data Sources

- Gateway Certifications:
  - Yellowbrick 5.x
- OOTB Driver Updates:
  - Big Query ODBC: 2.4.6.1015
  - Big Query JDBC: 1.2.23.1027
  - Spark ODBC driver 2.6.23.1039
  - Spark JDBC 2.6.26.1045
  - Impala ODBC 2.6.16.1022
- Functionality Enhancements:
  - Delta Lake format support via Cloud Storage Connector for ADLS2, Amazon S3, and Google Cloud Storage
  - Ability to access cross-account buckets in S3
- Security and Performance Enhancements

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- Case and CaseV Functions have been pushed down to the database side for Azure Synapse and Db2.
- Secure transaction certification for Snowflake and SingleStore

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2021 Update 5.2 (May 2022)

Released on May 20, 2022

MicroStrategy HyperIntelligence

This version of HyperIntelligence is based on Google's new manifest version, Manifest V3. New browser requirements apply. The browser must be Chrome v99 or later.

MicroStrategy Workstation

- Create contacts and contact groups to subscribe to content in subscriptions. This former preview feature is available out-of-the-box.
- Create connection mappings to ensure data security for content.
- View and edit security access for projects.
- Delete data sources from the revamped Data Sources dialog.

MicroStrategy Packages for Python (mstrio-py)

- A `Fact` class in the `mstrio.modeling.schema.fact` subpackage allows fact management.
- A `list_facts` function allows the listing of facts.

See the mstrio-py help for more information.

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Data Sources

See *Platform Certifications* for information on the latest supported and certified configurations.

1. OOTB Driver Updates:
    - Oracle ODBC Driver
    - Sybase ASE ODBC driver
    - Drill ODBC Driver
2. Functionality Enhancements

- Support for Kerberos and LDAP authentication modes in Modern Data Source Management in Workstation
- TLS Support for ODBC connectivity in Modern Data Source Management

Released on May 12, 2022

This release provides remediation for a group of security vulnerabilities found within Java by upgrading the Java version to 11.0.15+10 across products. Learn more.

2021 Update 5.1 (April 2022)

Released on April 22, 2022

MicroStrategy Workstation

- Configure subscription delivery types in your environment for content delivery.
- Create and edit delivery devices to package content for seamless delivery.

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- *Preview Feature*: Create contacts and contact groups to subscribe to content in subscriptions.
- *Preview Feature*: Create reports using the Report Editor.

Android

- Subscribe to the entire dossier content in PDF or Excel format to send updates directly to your email inbox.
- Export entire dossiers to Excel.

MicroStrategy Packages for Python (mstrio-py)

- New `Attribute` class in the `mstrio.modeling.schema.attribute` subpackage allows attribute management.
- New `AttributeForm` class in the `mstrio.modeling.schema.attribute_form` subpackage allows attribute form management.
- New `list_attributes` allows listing of attributes.
- New `list_functions` in the `mstrio.modeling.expression` subpackage allows listing of functions.
- New `act_expression`, `expression`, `expression_nodes`, `parameters`, and `dynamic_date_time` modules in the `mstrio.modeling.expression` subpackage allow management of fact expressions.
- `ExecutionMode` elements have been changed from `ASYNCH_CONNECTION` to `ASYNC_CONNECTION` and from `ASYNCH_STATEMENT` to `ASYNC_STATEMENT`.
- Refactored examples in the `code_snippets` folder, with modifications to

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make them easier to use in MicroStrategy Workstation.

- Renamed the `workstation_demos` folder to `workflows`.

MicroStrategy Cloud Platform

- Increased default sizes for EBS and disk for all MicroStrategy Cloud environments to better support smart memory, increasing data scalability.
- Increased throughput for shared storage from 25 MB to 40 MB for all MicroStrategy Cloud environments. This optimizes deployment and overall performance.

Released on April 7, 2022

This release includes remediations for CVE-2022-22965 by upgrading Spring Framework libraries version to 5.3.18.

2021 Update 5 (March 2022)

MicroStrategy Workstation
MicroStrategy Web
MicroStrategy Library
MicroStrategy Library Mobile
Intelligence Server
MicroStrategy Platform Analytics
MicroStrategy Library Mobile SDK
MicroStrategy Mobile SDK
MicroStrategy Packages for Python (mstrio-py)
MicroStrategy Visualization SDK
MicroStrategy REST APIs
MicroStrategy Cloud Platform
Data Sources

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MicroStrategy Workstation

- Easily display and compare one or more key metrics on a scale using thresholds with a Gauge visualization.
- Waterfall chart setting to dynamically color the start point according to increase or decrease for enhanced precision.
- A new KPI section houses multi-metric, comparison, and classic KPIs.
- Sankey and Time Series visualizations appear in the More section.
- Setting to control how users dismiss information windows with the option to enable a close button.
- Lock specific filter selections to disable interactions in the Filter panel.
- Options for vertical scrolling have been extended to allow authors to expand the canvas while retaining the existing content dimensions.
- Create transformations.
- Create custom groups.
- Create and edit history list subscriptions.
- View and edit log configuration settings.
- Create Intelligent cubes. This former preview feature is available out-of-the-box.
- Improve report and cube performance against the data warehouse by using an attribute form caching Intelligence cube.
- Shortcuts allow architects to organize their objects in a way that is more accessible and convenient for both the end-users and the architecture team managing them. Right-click an object anywhere on the Workstation window to create a shortcut.
- Customize user delivery addresses in the User Editor.

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- Easily manage and distribute content groups to users or user groups for viewing across Library applications. This former preview feature is available out-of-the-box.
- *Preview Feature*: Monitor objects changes through the change journal.
- Request and configure a new ESRI key. This is required for ESRI maps to continue to display starting in this release. ESRI map styles have been updated for enhanced readability.
- Open and edit a dossier without loading the data.
- MicroStrategy Storage Service adds a local or remote repository for Library server. This former preview feature is available out-of-the-box. In this release, the following new features have been added:
  - Amazon S3 is supported.
  - The database is configured automatically in both on-premises and cloud environments.
  - Shared storage is configured through Workstation.

MicroStrategy Web

- Easily display and compare one or more key metrics on a scale using thresholds with a Gauge visualization.
- Waterfall chart setting to dynamically color the start point according to increase or decrease for enhanced precision.
- A new KPI section houses multi-metric, comparison, and classic KPIs.
- Sankey and Time Series visualizations appear in the More section.
- Setting to control how users dismiss information windows with the option to enable a close button.
- Lock specific filter selections to disable interactions in the Filter panel.

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- Options for vertical scrolling have been extended to allow authors to expand the canvas while retaining the existing content dimensions.
- Request and configure a new ESRI key. This is required for ESRI maps to continue to display starting in this release. ESRI map styles have been updated for enhanced readability.

MicroStrategy Library

- Easily display and compare one or more key metrics on a scale using thresholds with a Gauge visualization.
- Waterfall chart setting to dynamically color the start point according to increase or decrease for enhanced precision.
- A new KPI section houses multi-metric, comparison, and classic KPIs.
- Sankey and Time Series visualizations appear in the More section.
- Setting to control how users dismiss information windows with the option to enable a close button.
- Lock specific filter selections to disable interactions in the Filter panel.
- Options for vertical scrolling have been extended to allow authors to expand the canvas while retaining the existing content dimensions.
- Open and edit a dossier without loading the data.
- Rename a dossier from the File menu.
- An updated, modern Save and Save As dialog.
- View default content groups in the Sidebar menu pushed automatically to your Library application by administrators.
- Request and configure a new ESRI key. This is required for ESRI maps to continue to display starting in this release. ESRI map styles have been updated for enhanced readability.

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MicroStrategy Library Mobile

iOS

- View default content groups in the Sidebar menu pushed automatically to your Library application by administrators.
- Lock specific filter selections to disable interactions in the Filter panel.

Android

Lock specific filter selections to disable interactions in the Filter panel.

Intelligence Server

- *Preview Feature:* The metadata, Distribution Service, and History List repositories support JDBC connection with PostgreSQL.

MicroStrategy Platform Analytics

Client Telemetry data can be purged in Platform Analytics. This completes full parity with Enterprise Manager for Client Telemetry.

MicroStrategy Library Mobile SDK

iOS

When you customize MicroStrategy Library Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

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MicroStrategy Mobile SDK

iOS

- BlackBerry certification to support iOS 15 with Xcode 13.1.
- MobileIron certification to support iOS 15 with Xcode 13.1.
- When you customize MicroStrategy Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 or Apple M1 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

MicroStrategy Packages for Python (mstrio-py)

You can use the mstrio-py Python library and its dependencies when using Python within Workstation. Download the mstrio-py Python library through PyPi or GitHub. See the mstrio-py help help for a complete guide of the available modules for MicroStrategy data science and system administration tasks. New features include:

- *Preview Feature*: A Python module for object migrations. Use Python to create a migration package on the source and deploy it on a target environment. You *do not* have to enable preview features in Workstation to use this functionality.
- A `SchemaManagement` class in the `mstrio.modeling` subpackage that allows schema management.
- A `UserHierarchy` class in the `mstrio.modeling` subpackage that allows user hierarchy management.
- A `list_user_hierarchies` function that allows the listing of objects in the newly created `UserHierarchy` class.

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MicroStrategy Visualization SDK

Tag custom visualizations to appear in relevant sections of the Visualization Gallery.

MicroStrategy REST APIs

- Retrieve, create, and update metric objects.
- Retrieve, create, and update transformation objects.
- Retrieve, create, and update base formula objects.
- Retrieve, create, and update subtotal objects.
- Retrieve, create, and update cube objects.
- Create, edit, and delete history list subscriptions.

MicroStrategy Cloud Platform

- Deploy Azure Enterprise Environments in the UAE North Region
- Support for Azure environments in the Switzerland North Region. Now customers in this region can select from Team, Department, or Enterprise environments.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

1. Gateway Certifications
   - Vertica 11.0.2
   - Denodo 8.0
2. OOTB Driver Updates

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- Snowflake ODBC and JDBC Driver
- Google BigQuery ODBC and JDBC Driver
- Cloudera Hive and Impala JDBC Driver
- Driver Manager files on Linux Platform
- SQL Server JDBC Driver
- MongoDB JDBC Driver
- SAP HANA ODBC Driver
- Salesforce ODBC Driver
- Drill JDBC Driver
- Spark SQL JDBC Driver
- Concur JDBC Driver
- Eloqua JDBC Driver
- HubSpot JDBC Driver
- Marketo JDBC Driver
- ServiceNow JDBC Driver
- Shopify JDBC Driver
- Square JDBC Driver

3. Security and Performance Enhancements
    - Case and CaseV functions have been pushed to the gateway side for PostgreSQL, SQL Server, Redshift, MySQL, Google BigQuery, Impala, Spark SQL, Hive, and Oracle 21c.
    - Enable secure transaction in a live metadata update for SQL Server
4. Functionality Enhancements

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- Simple mode data source management for major Diamond and Platinum gateways with support of JDBC TLS configuration.

2021 Update 4.1 (February 2022)

The February release includes security, performance, and user experience updates to:

- HyperMobile for Android and iOS
- Library Mobile for Android and iOS
- Workstation for macOS and Windows

2021 Update 4.1 (January 2022)

Released on January 28, 2022

MicroStrategy Library Mobile

iOS

Support for native integrated Intune SDK with Xcode 13.1.

Android

Optimized data encryption and security. See KB485325 for more information.

MicroStrategy Mobile

iOS

Support of native integrated AirWatch SWIFT SDK with Xcode 13.

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MicroStrategy Packages for Python (mstrio-py)

- The following have been added:
  - `Contact` class in the `mstrio.distribution_services.contact` subpackage to allow contact management
  - `ContactGroup` class in the `mstrio.distribution_services.contact_group` subpackage to allow contact group management
  - `Device` class in the `mstrio.distribution_services.device` subpackage to allow device management
  - `Transmitter` class in the `mstrio.distribution_services.transmitter` subpackage to allow transmitter management
  - `list_contact`, `list_contact_groups`, `list_devices`, `list_transmitters` functions to allow listing of objects of newly created classes
  - `PackageConfig` class in the `mstrio.server.migration` subpackage with support for `PackageSettings` and `PackageContentInfo`, used for configuration migration
  - Delete functionality to the `Document`, `Dossier`, and `Report` classes
- The `Event` class has been extended in the `mstrio.distribution_services.event` subpackage with functionalities to create, update, and delete events.
- The `Connection` object attribute, `session`, has been renamed to `_session`.
- The `get`, `head`, `post`, `put`, `delete`, and `patch` HTTP request methods can be added to the `Connection` object.

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- Change the `Connection` object to automatically renew the connection or reconnect when the session becomes inactive if authenticated with login and password.
- Connect to your MicroStrategy environment using the `Connection` class.

  The `UseLibrary` privilege is required to log into Library
- Import and filter data from `OlapClub`, `SuperCube`, or `Report` into a Pandas DataFrame.
- Export data into MicroStrategy by creating or updating `SuperCube`.
- The following administration modules are included:
  - Project management module
  - Server management module
  - User and Usergroup management modules
  - Schedules management module
  - Subscription management modules, including email subscription and cache update subscription
  - Document and Dossiers in User Library modules
  - User Connections management module
  - Privilege and Security Role management modules
  - Cube Cache management module
  - Intelligent cube management module
  - Security Filter module
  - Datasources subpackage for database management
  - Job Monitor module
  - Object Management module

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- Contact module
- Contact Group module
- Device module
- Transmitter module
- Event module

See the mstrio-py help for more information.

Released on January 10, 2022

This release includes remediations for CVE-2021-45105 and CVE-2021-44832 by upgrading to Apache Log4j 2 version to 2.17.1.

MicroStrategy 2021 Update 4.1 includes the following three remediated vendor drivers, which have been upgraded to Log4j 2.17:

- Magnitude SparkSQL
- Hive
- ImpalaJDBC

2021 Update 4 (December 2021)

This release includes remediations for CVE-2021-44228 and CVE-2021-45046 by upgrading to Apache Log4j 2 versions to 2.16.0.

MicroStrategy 2021 Update 4 includes three third-party, vendor-provided drivers with embedded Log4j libraries. MicroStrategy has determined these libraries are vulnerable. We are working with the vendors to make remediated drivers available. In the interim, we recommend mitigation steps to be taken on the following systems where these drivers are present: MicroStrategy Intelligence Server and MicroStrategy Workstation. Environments deployed in the MicroStrategy Cloud have these supplemental mitigation steps already applied.

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Mitigation steps are detailed in MicroStrategy's response to the Log4j Vulnerability (CVE-2021-44228) and (CVE-2021-45046).

Platform Certifications

Changes to the support matrix for third-party software will come into effect after June 2022. See KB485274 and Platform Certifications for more information.

MicroStrategy Workstation

- Show or hide objects.
- Design and create custom applications for unique Library viewing experiences based on user or user group requirements.
- Provide in-context data without taking up permanent screen real estate with information windows in dossier. Trigger information windows from an image, text box, or visualization.
- After searching for a location on a Geospatial Service visualization, a pin automatically drops so you can easily interact with the selectors to discover what points of interest are within range.
- *Preview Feature:* Create Intelligent cubes using the Intelligent Cube Editor.
- *Preview Feature:* Move objects between environments using migration packages.
- *Preview Feature:* Easily manage and distribute content groups to users or user groups for viewing across Library applications.
- *Preview Feature:* MicroStrategy Storage Service adds a local or remote repository for Library server.

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MicroStrategy Web

- Provide in-context data without taking up permanent screen real estate with information windows in dossier. Trigger information windows from an image, text box, or visualization.
- After searching for a location on a Geospatial Service visualization, a pin automatically drops so you can easily interact with the selectors to discover what points of interest are within range.
- By default, the Convert to Document button is no longer available from the File menu in dossier authoring. Dossier's latest, modern workflows are not compatible with document features. If you need to enable this setting, go to `/webapps/MicroStrategy/WEB-INF/xml/sys_defaults.xml` on the Web server. Then change the value in **Allow Dossier to RSD conversion** from **0** to **1** and restart the Web server.

MicroStrategy Library

- Connect to multiple app workspaces to view customized Library experiences.
- Edit or create new dossiers all within the Library interface.
- View the My Content section in the Sidebar menu to filter by all content that you own.
- Subscribe to dossier content in PDF or Excel format to send updates directly to your email inbox.
- Undo or redo dossier manipulations such as filtering, drilling, and sorting.
- Provide in-context data without taking up permanent screen real estate with information windows in a dossier. Trigger information windows from an image, text box, or visualization.

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- After searching for a location on a Geospatial Service visualization, a pin automatically drops so you can easily interact with the selectors to discover what points of interest are within range.
- *Preview Feature:* View default content groups in the Sidebar menu pushed automatically to your Library application by administrators.

MicroStrategy Library iOS

- Connect to and switch between multiple app workspaces to view customized Library experiences.
- View the My Content section in the Sidebar menu to filter by all content that you own.
- Subscribe to dossier content in PDF or Excel format to send updates directly to your email inbox.
- Provide in-context data without taking up permanent screen real estate with information windows in a dossier. Trigger information windows from an image, text box, or visualization.
- *Preview Feature:* View default content groups in the Sidebar menu pushed automatically to your Library application by administrators.

MicroStrategy Library Android

- Connect to and switch between multiple app workspaces to view customized Library experiences.
- View the My Content section in the Sidebar menu to filter by all content that you own.
- Provide in-context data without taking up permanent screen real estate with information windows in a dossier. Trigger information windows from an image, text box, or visualization.

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- *Preview Feature:* View default content groups in the Sidebar menu pushed automatically to your Library application by administrators.

MicroStrategy Library Mobile SDK

iOS

When you customize Library Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

Android

The Library Mobile SDK for Android is certified to work with Android 12 (API level 31). When you customize Library Mobile for Android, you must have Android SDK 31 to develop and compile your application. Android Studio 4.2 and up is supported.

MicroStrategy Mobile SDK

iOS

When you customize MicroStrategy Mobile SDK for iOS, you must have an Apple Mac with BigSur 11.6 and above using an Intel x86 chip machine, running Xcode® 13.1 with the Apple iOS SDK 15, to develop and compile your application.

Android

The MicroStrategy Mobile SDK for Android is certified to work with Android 12 (API level 31). When you customize MicroStrategy Mobile for Android, you must have Android SDK 31 to develop and compile your application. Android Studio 4.2 and up is supported.

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MicroStrategy Web SDK

Several APIs have been deprecated.

MicroStrategy Embedding SDK

- Enhancements for authoring an embedded dossier.
- Control the display of items in authoring toolbar.
- Control the display of authoring panels.
- Support for creating a new dossier.
- Show or hide all entries for a subscription.

Installation

Install updates using a full platform installer on Windows and Linux. See KB485278 for more information.

Data Sources

- Microsoft SQL Server 2019 Analysis Services is certified.
- Cloudera Data Platform (CDP) Private Cloud Base 7.1 is certified.
- Secure text input through parameterized queries has been extended to transaction inputs in transaction services reports and documents. See KB485174 for more information and a list of certified gateways that are automatically enabled with each MicroStrategy 2021 Update release.

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2021 Update 3 (November 2021)

MicroStrategy Mobile SDK

iOS

Support for MobileIron with iOS 15.

2021 Update 3 (October 2021)

MicroStrategy Library

Export to PDF filter summaries include the full attribute and metric names.

MicroStrategy Library Mobile

iOS

Export entire dossiers to Excel.

MicroStrategy Mobile SDK

iOS

Supports BlackBerry Dynamics native EMM SDK with iOS 15.

MicroStrategy Library Mobile SDK

iOS

Supports Intune native EMM SDK with iOS 15.

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MicroStrategy Packages for Python (mstrio-py)

- A new `CacheUpdateSubscription` class in the `subscription` module.
- Return a specific type of subscription object using `list_subscriptions`.
- The inner structure of `mstrio.distribution_services.subscription` was changed. Make sure to import from `mstrio.distribution_services` or `mstrio.distribution_services.subscription` at most. Anything deeper is considered internal implementation detail and not guaranteed to remain stable.
- New `user` and `user_group` arguments added to the `list_security_filters` function to allow filtering results by user or user group.
- New `list_security_filter` method and `security_filters` property for the `UserGroup` class.
- New `list_security_filter` method `security_filters` property for the `User` class.

2021 Update 3 (September 2021)

MicroStrategy HyperIntelligence

MicroStrategy Workstation

MicroStrategy Web

MicroStrategy Library

Federated Analytics

MicroStrategy Command Manager

MicroStrategy Mobile

MicroStrategy Web SDK

MicroStrategy Embedding SDK

MicroStrategy REST APIs

Data Sources

Privileges

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MicroStrategy HyperIntelligence

Add contextual dosser links to HyperIntelligence cards.

MicroStrategy Workstation

- Create and edit user hierarchies.
- View the system hierarchy of a project.
- Manage and monitor jobs.
- Create and edit cache update subscriptions.
- Compare environment configurations.
- Use a Multi-Metric KPI to provide a quick performance indication for two or more metrics.
- Use a Comparison KPI to indicate the progress towards an objective, like sales and goal.
- For every dossier object, experience an intuitive Format panel with visual cues, organized into three consistent tabs for visualization or object specific options, text and form, and container. Collapsible folders and toggles make it easy to find what you're looking for.
- From the Layers panel, drag and drop existing visualizations and objects from the canvas into panels in dossier panel stacks.
- Support a new MDX/OLAP data source of Kyligence for hierarchy reporting.
- Applications have been renamed to projects.
- Better control of how attributes are related in data import Intelligent cubes (also known as Super Cubes) with a single Attribute Relationship Model setting. This feature requires a data engine version of 2021 or above.

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- *Preview Feature*: Add information windows in dossiers. Information windows are dynamic popups that enhance the visual interactivity for the end-user.

MicroStrategy Web

- Use a Multi-Metric KPI to provide a quick performance indication for two or more metrics.
- Use a Comparison KPI to indicate the progress towards an objective, like sales and goal.
- For every dossier object, experience an intuitive Format panel with visual cues, organized into three consistent tabs for visualization or object specific options, text and form, and container. Collapsible folders and toggles make it easy to find what you're looking for.
- From the Layers panel, drag and drop existing visualizations and objects from the canvas into panels in dossier panel stacks.
- Support a new MDX/OLAP data source of Kyligence for hierarchy reporting.
- Manage SAML configuration files in a Web browser.

MicroStrategy Library

Export entire dossiers to Excel.

Federated Analytics

MicroStrategy for Power BI

Support for OIDC authentication.

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MicroStrategy Command Manager

Enable, disable, and list mobile telemetry settings of Platform Analytics statistics properties through Command Manager.

MicroStrategy Mobile

Manage SAML configuration files in a Web browser.

MicroStrategy Web SDK

Several APIs have been deprecated.

MicroStrategy Visualization SDK

Create a Format panel using a React-based framework.

MicroStrategy Embedding SDK

- Author an embedded dossier.
- Enable the selection of attribute elements.

MicroStrategy REST APIs

- View a newly created migration package.
- View content from an uploaded migration package.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

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1. Gateway Certifications
    - Azure PostgreSQL is certified. See KB485177 for more information.
    - Azure SQL Managed Instance is certified. See KB485172 for more information.
2. OOTB Driver Updates
    - The latest ODBC trace file, drivers for SQL Server, IBM Db2, Redshift, Oracle, and SAP HANA gateways are out-of-the-box, optimizing security and performance.
3. Security and Performance Enhancements
    - OAuth authentication is supported via ADFS authentication for Snowflake.
    - OAuth authentication is supported via Cognito for Amazon S3.
    - Azure SQL Database single sign-on (SSO) support extends to JDBC driver.
    - SSL is enabled by default for PostgreSQL in MicroStrategy Web and Workstation.
    - SSL is enabled by default for SQL Server in MicroStrategy Web and Workstation.
    - The following functions have been pushed to the gateway side for PostgreSQL:
        - RunningStdevPFunction
        - MovingStdevPFunction
        - MovingStdevFunction
        - RunningStdevFunction
        - LagFunction

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- LeadFunction
- ToNumberFunction
- StrLastPositionFunction
- StrBeginsWithFunction
- StrEndsWithFunction
- StrCharFunction
- StrReplaceFunction
- StrRepeatFunction

4. Functionality Enhancements
    - Connect to the Salesforce Sandbox instance through the Salesforce Report connector.

Privileges

See Privileges by License Type for information about license types and associated privileges.

The Manage Application privilege has been added to the Server - Intelligence license.

2021 Update 2 (August 2021)

The August release includes defect fixes for stability and user experience.

2021 Update 2 (July 2021)

MicroStrategy Workstation

- Create and edit consolidations.
- Display a customized interface based on a user's assigned privileges.

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2021 Update 2 (June 2021)

MicroStrategy HyperIntelligence
MicroStrategy Workstation
MicroStrategy Web
MicroStrategy Library
MicroStrategy Library Mobile
MicroStrategy Mobile
MicroStrategy Packages for Python
MicroStrategy for Office
MicroStrategy Embedding SDK
MicroStrategy REST APIs
Data Sources
Privileges

MicroStrategy HyperIntelligence

- Control the default on/off state of HyperIntelligence cards on HyperWeb.
- Create Hyper cards with the Compact template ideal for landscape viewing and sharing via Twitter.
- Generate a white-labeled HyperIntelligence for Web add-in via MicroStrategy Workstation.
- Improved app accessibility with contrast-friendly colors.

MicroStrategy Workstation

- Create and certify Python scripts.
- Dedicated Python Script Gallery section with Python mstrio modules, sample Python scripts, Python code snippets, and built-in search for easy navigation.
- Python Script Gallery tooltip with insight on how to use classes and functions, with usage examples.
- A time series visualization that enables common financial and market analysis workflows.

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- A modern grid visualization that allows you to include microcharts within cells and support one-click contextual linking.
- Add rich formatting to text boxes to create compelling infographic dossiers.
- Intuitive Format panel with visual cues, organized into three consistent tabs for visualization or object specific options, text and form, and container. Collapsible folders and toggles make it easy to find what you're looking for.
- Edit panel stacks with an intuitive tree structure in the Layers panel, use filters outside panel stacks to target dynamic text boxes, and copy and move panel stacks across chapters and pages.
- Panels in dossier panel stacks are executed on demand to improve performance.
- Create and edit schedules.
- Manage and monitor jobs.
- Change ownership of subscriptions.
- Create, edit, and manage security filters.
- View component and dependent objects.
- Create multiple types of objects such as filters, metrics, prompts, security filters, attributes, and facts in one place. To access this functionality, open the main Workstation window and click ⊕ next to **Objects**.
- View and edit Library Administration settings in Workstation.

MicroStrategy Web

- A time series visualization that enables common financial and market analysis workflows.

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- A modern grid visualization that allows you to include microcharts within cells and support one-click contextual linking.
- Add rich formatting to text boxes to create compelling infographic dossiers.
- Intuitive Format panel with visual cues, organized into three consistent tabs for visualization or object specific options, text and form, and container. Collapsible folders and toggles make it easy to find what you're looking for.
- Edit panel stacks with an intuitive tree structure in the Layers panel, use filters outside panel stacks to target dynamic text boxes, and copy and move panel stacks across chapters and pages.
- Panels in dossier panel stacks are executed on demand to improve performance.
- Basic OIDC authentication support.
- The Admin pages support basic authentication when SAML authentication is enabled for Web.

MicroStrategy Library

- Enhanced OIDC authentication workflows for automatic and seamless login.
- A time series visualization that enables common financial and market analysis workflows.
- A modern grid visualization that allows you to include microcharts within cells and support one-click contextual linking.
- Add rich formatting to text boxes to create compelling infographic dossiers.

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- Panels in dossier panel stacks are executed on demand to improve performance.
- Enhanced accessibility with a new F6 keyboard shortcut allowing for quick navigation between regions.
- Improved ability to navigate throughout Dossier containers in a logical order using screen readers and keyboard controls.

MicroStrategy Library Mobile

iOS

Improved graph readability with y-axis word-wrap, nested labels, and bar chart label positioning.

Android

Panels in dossier panel stacks are executed on demand to improve performance.

iOS and Android

- Enhanced OIDC authentication workflows for automatic and seamless login.
- A time series visualization that enables common financial and market analysis workflows.
- A modern grid visualization that allows you to include microcharts within cells and support one-click contextual linking.
- Add rich formatting to text boxes to create compelling infographic dossiers.

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MicroStrategy Mobile

iOS and Android

Basic OIDC authentication support.

MicroStrategy Packages for Python (mstrio-py)

- A new `Schedule` class in the `mstrio.distribution_services.schedule` subpackage.
- A new `ScheduleTime` class in the `mstrio.distribution_services.schedule` subpackage, which is a local object used for specifying time related properties of schedule.
- A new `Event` class in the `mstrio.distribution_services.event` subpackage.
- The `Subscription` class has been modified to use `Schedule` objects.
- A new `datasources` subpackage with `Dbms`, `DatabaseConnections`, `DatasourceInstance`, `DatasourceLogin`, `DatasourceMap` classes covering database management functionality.
- New `list_available_dbms`, `list_datasource_connections`, `list_datasource_instances`, `list_datasource_logins`, and `list_datasource_mappings` functions that list all data source related objects.
- A `database_connections` module that allows you to browse and manage database connections to the environment.
- New ACL management functionality for all supporting objects by adding `list_acl`, `acl_add`, `acl_remove`, and `acl_alter` methods.
- A `SecurityFilter` class and `list_security_filters` function in the `mstrio.access_and_security.security_filter` subpackage

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- A new `Qualification` class in the `mstrio.access_and_security.security_filter` subpackage, which is an object used to represent a security filter qualification.
- New `PredicateBase`, `PredicateForm`, `PredicateElementList`, `PredicateFilter`, `PredicateJointElementList`, and `LogicOperator` classes in the `mstrio.access_and_security.security_filter` subpackage to represent predicates that can be used when creating a security filter qualification.
- New `ParameterBase`, `ConstantParameter`, `ObjectReferenceParameter`, `ExpressionParameter`, `PromptParameter`, `DynamicDateTimeParameter`, and `ConstantArrayParameter` classes in the `mstrio.access_and_security.security_filter` subpackage to represent the parameters used in `AttributeForm`.
- `mstrio.admin.schedule` has been replaced with the `mstrio.distribution_services.schedule` subpackage.
- The `schedules_id` argument has been replaced by `schedules` in the create and alter methods of the Schedule class.
- `mstrio.distribution_services.schedule.ScheduleManager` has been replaced with `mstrio.distribution_services.schedule.list_schedules()`.

See the mstrio-py help for more information.

MicroStrategy for Office

Generate the manifest file for the MicroStrategy for Office add-in from MicroStrategy Web.

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MicroStrategy Embedding SDK

- Interact with panel stacks in dossiers.
- Embed a single visualization.

MicroStrategy REST APIs

- Create and manage user hierarchy objects.
- Create and manage custom group objects.
- Create and manage consolidation objects.
- Create and import migration packages.
- Retrieve SQL statements and query details.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

1. New Gateways
   - New Gateway Connector for Microsoft Dynamics 365.
   - New Gateway Connector for Databricks.
2. OOTB Driver Updates
   - Exasol ODBC and JDBC drivers are shipped out-of-the-box.
3. Security and Performance Enhancements
   - Oracle Cloud Wallet authentication files are supported end-to-end for Oracle Cloud environments.

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- Azure Active Directory is supported via SAML authentication tokens for Snowflake, Azure SQL Database (ODBC Driver), and Azure Synapse Analytics (ODBC Driver).
- Azure Active Directory is supported via OIDC tokens for Snowflake, Google BigQuery, Azure SQL Database (ODBC Driver), and Azure Synapse Analytics (ODBC Driver).
- Google Cloud Storage supports authentication via OAuth and Service Account workflows.

4. Functionality Enhancements
   - Financial Force, Veeva CRM, and ServiceMax have been integrated through the Salesforce Connector.

Privileges

See Privileges by License Type for information about license types and associated privileges.

The following privileges have been added to the Server - Intelligence license:

- Create and edit content bundles
- Certify Python Script

The following privileges have been added to the Architect license:

- Create package
- Apply package

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2021 Update 1 (May 2021)

Workstation

- Create and edit derived elements for a report.
- Create and edit object prompts.

Federated Analytics

MicroStrategy Packages for Python (mstrio-py)

- Modified file structure to organize modules in clean and readable way.
- New and improved type hints across the code base.
- New `PrivilegeMode`, `IdleMode`, `GroupBy`, `ServiceAction`, `Rights`, and `Permissions` enums.
- A new `Node` class to be used for node management in place of a raw dict.
- A new `CubeCache` class added to the `mstrio.application_objects.datasets` subpackage.
- The `load_cube` method can load cubes by name.
- New `list_cube_caches`, `delete_cube_caches`, and `delete_cube_cache` functions.
- New `create`, `update`, `get_sql_view`, and `publish` methods for the `OlapCube` class.
- A new `unpublish` method for the `OlapCube` and `SuperCube` classes.
- A new `list_reports` function for the `Report` module.
- New `alter` and `list_properties` methods for the `Report` class.
- The `id` parameter replaces the `report_id` parameter in the `Report` class.

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See the mstrio-py help for more information.

2021 Update 1 (April 2021)

MicroStrategy Workstation

Create and edit value prompts.

Federated Analytics

MicroStrategy Packages for Python (mstrio-py)

- The following have been added:
  - `SuperCube` and `OlapCube` in the `mstrio.application_objects.datasets` subpackage
  - `list_all_cubes`, `load_cube`, `list_super_cubes`, and `list_olap_cubes` functions that allow you to search for cubes by name and construct precise objects
  - `user_id`, `user_full_name`, `user_initials` to the `Connection` class
  - `trust_id` and `database_auth_login` parameters in the `user.alter()` method
  - More `Cube` object attributes similar to other MicroStrategy objects
- Alter the `name`, `description`, and `abbreviation` properties of cubes.

See the mstrio-py help for more information.

2021 Update 1 (March 2021)

MicroStrategy HyperIntelligence
MicroStrategy Workstation
MicroStrategy Mobile
MicroStrategy Library Mobile SDK

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MicroStrategy Web
MicroStrategy Library
MicroStrategy Library Mobile
MicroStrategy Intelligence Server
MicroStrategy REST APIs
MicroStrategy Cloud Platform
Data Sources
Privileges

MicroStrategy HyperIntelligence

- Performance and stability are optimized for HyperIntelligence cards that are enabled with pattern matching:
  - Improved pattern detection and card rendering performance on HyperWeb and HyperOffice for 8-10 million rows of data.
  - Decreased loading time when authoring a card based on a large dataset in MicroStrategy Workstation.
  - Improved speed when enabling a card on the HyperWeb extension.
- Control text alignment when formatting card widgets.

MicroStrategy Workstation

- New Sankey Diagram visualization to compare data flow is available in the Custom area of the Visualization Gallery.
- Add panel stacks from the top toolbar to enable additional flexibility on analytics workflows, while optimizing the use of screen real estate.
- Improved graph readability with y-axis word-wrap, nested labels, and bar chart label positioning.
- Drop-down selectors in documents support multi-selection.
- Create and edit Distribution Services email subscriptions with multiple pieces of content.
- Create and edit attribute objects, including form expressions, relationships, and display and sort information.

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- View user activity, additional property information, and SQL execution details from the cube monitor.
- View, load, and unload projects. You can also view recent users and specify on which nodes' projects are loaded during server start up.
- Execute Python scripts saved to your metadata from Workstation.
- New dossier and document property that allows the administrator to choose the default open state of the content in Library as Last Viewed (available at both Environment and Project levels).
- *Preview Feature*: Add Microcharts and Rich Text formatting for text boxes in dossiers.

MicroStrategy Web

- New Sankey Diagram visualization to compare data flow is available in the Custom area of the Visualization Gallery.
- Add panel stacks from the top toolbar to enable additional flexibility on analytics workflows, while optimizing the use of screen real estate.
- Improved graph readability with y-axis word-wrap, nested labels, and bar chart label positioning.
- Drop-down selectors in documents support multi-selection.
- New dossier and document property that allows the author to choose the default open state of the content in Library as Last Viewed or Last Saved.
- Enhanced sharing workflow that enables search to return all users and user groups that contain the key term.

MicroStrategy Library

- Select the default open state of dossiers and documents in Library as Last Viewed by the end user or Last Saved by the author (reset to original

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view).

- Drop-down selectors in documents support multi-selection.
- SAML **Admin Groups** govern the Library admin pages when SAML authentication is enabled.

MicroStrategy Library Mobile

iOS

- Download and view Excel and CSV files with native in-app support.
- Select the default open state of dossiers and documents in Library as Last Viewed by the end user or Last Saved by the author (reset to original view).
- Select and copy individual grid cells contents and URLs to the clipboard.
- New Waterfall chart supports Show Difference and Show Sum modes to display data intuitively, as well as an option to hide or show the connection line.
- Enhanced Pie and Ring charts with optimized use of container blank space, improved data labels with leader lines, and option to show percentage.
- Sort Pie and Ring charts in ascending and descending order.
- Hide or show the Metrics header text in a grid visualization.
- Use compound grid visualizations to filter data in other visualizations.
- Certification of native integration with Intune and AppConfig compliance.
- Drop-down selectors in documents support multi-selection.

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Android

- Use a document or dossier as the home screen to build powerful mobile experiences.
- Select the default open state of dossiers and documents in Library as Last Viewed by the end user or Last Saved by the author (reset to original view).
- Select and copy individual grid cells contents and URLs to the clipboard.
- New Waterfall chart supports Show Difference and Show Sum modes to display data intuitively, as well as an option to hide or show the connection line.
- Enhanced Pie and Ring charts with optimized use of container blank space, improved data labels with leader lines, and option to show percentage.
- Sort Pie and Ring charts in ascending and descending order.
- Hide or show the Metrics header text in a grid visualization.
- Use compound grid visualizations to filter data in other visualizations.
- Drop-down selectors in documents support multi-selection.

MicroStrategy Intelligence Server

- Memory usage breakdown information is logged in the DSSErrors.log to help troubleshoot Memory Contract Manager denial state or shut down due to an extended timeout limit of the denial state.
- Improved cube loading time by up to 50% through persisting and loading attribute indexes from disk. See KB48489 for more information.

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MicroStrategy Mobile

iOS

Support for native integrations with AirWatch, MobileIron, BlackBerry Dynamics, and AppConfig compliance.

Android

Support for native integrations with AirWatch and AppConfig compliance.

MicroStrategy Library Mobile SDK

Preconfigure Library Mobile for Android.

MicroStrategy REST APIs

- Reload (update) the schema and manage the schema lock.
- Create and manage attribute objects and relationships.
- Create and manage fact objects.
- Create and manage table objects, including user free-form SQL to create logic tables.
- Create and manage security filters, including filter definition and user assignment.
- Create and manage derived elements.
- Create and manage prompt objects, including expression, object, attribute element, and value prompts.
- Dossier API enhancements to enable interaction with filters and selectors.

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- Create, update, and delete Distribution Services devices, events, transmitters, and contacts via APIs.
- Create, update, list, and delete devices for email and FTP device types.
- Create, update, list, and delete events.
- Create, update, list, and delete transmitters for email, FTP, file, print, iPhone/iPad, and Android.
- Create, update, list, and delete contacts.
- Schedule enhancement to support multiple days of the week or month, choosing first or last weekday of the week or month (excluding holidays), and choosing last day of the month.
- Update multi-content subscriptions.
- Datasource management API enhancements to configure job prioritization.

MicroStrategy Cloud Platform

Improvements to MicroStrategy Backup and Restore (MSTRBak) to aid in the process of migrating customers into MicroStrategy Cloud, including:

- Additional database support when using Oracle and SQL Server databases, so you can leverage MicroStrategy Backup and Restore.
- New incremental update mode ("-u") to improve the experience during cutover to a parallel, upgraded environment.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

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1. Gateway Certifications
    - Oracle Cloud 21c
    - Exasol 6.2
    - Exasol 7.0
2. OOTB Driver Updates
    - The latest drivers for SQL Server, IBM Db2, MongoDB, and Salesforce gateways are out-of-the-box, optimizing security and performance.
3. Functionality Enhancements
    - Set the Max Metric Alias Size VLDB property for the following gateways:

Gateway	Max Metric Alias Size
SQL Server 2012 SQL Server 2014 SQL Server 2016 SQL Server 2017 SQL Server 2019	128
Azure Synapse	128
Db2	128
PostgreSQL	63
Oracle 12c	30

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Gateway	Max Metric Alias Size
Oracle 12cR2 Oracle 18c Oracle 19c Oracle 21c	128
Redshift	127
Teradata 15.x Teradata 16.x Teradata 17	128
Google BigQuery	128
Snowflake	256

Privileges

See Privileges by License Type for information about license types and associated privileges.

The Use Hyper SDK privilege is required to use Hyper SDK. See KB484951 for more information.

The Use Freeform SQL Editor privilege has been migrated from the Client - Architect license to the Server - Intelligence license. You can grant this privilege to the user and it won't occupy a Client - Architect license. Although it is listed under Client-Architect in the User Editor, it is mapped to the Intelligence license when the Intelligence server does a compliance check.

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The Enable on-premise data access via gateway agent privilege has been added to the Server - Intelligence license.

2021 Platform (February 2021)

MicroStrategy HyperIntelligence

Ability to support and enforce mobile security policies through any EMM platform that supports the AppConfig standards on HyperMobile for Android.

MicroStrategy Workstation

- Configure Okta as an OIDC authentication provider.
- View all database instances and set security access.
- Browse, filter, and search schema objects by ID.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

New SAP ECC Data Gateway.

MicroStrategy Library Mobile SDK

Preconfigure Library Mobile for Android.

2021 Platform

MicroStrategy Desktop
MicroStrategy HyperIntelligence
MicroStrategy Workstation
MicroStrategy Web
MicroStrategy Library
MicroStrategy Integrity Manager
MicroStrategy Mobile
MicroStrategy Library Mobile SDK
MicroStrategy Mobile SDK
MicroStrategy Visualization SDK

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MicroStrategy Library Mobile
MDX
Federated Analytics
MicroStrategy for Office
MicroStrategy Intelligence Server
MicroStrategy Platform Analytics
MicroStrategy Embedding SDK
MicroStrategy REST APIs
MicroStrategy Cloud Platform Installation
Data Sources
Privileges

MicroStrategy Desktop

MicroStrategy 2021 does not include a separate Desktop application. Soon, Workstation will be available to use for free, offline workflows, just as Desktop previously worked. Advanced functionality in Workstation will only be enabled when you connect to a MicroStrategy environment.

MicroStrategy HyperIntelligence

- Create and apply thresholds to the card header.
- Support for derived metrics on the card editor.
- Ability to replace datasets without sacrificing card design on the card editor.
- Embed HyperIntelligence on web-based applications using Hyper SDK.
- Ability to support and enforce mobile security policies through any EMM platform that supports the AppConfig standards on HyperMobile for iOS.

MicroStrategy Workstation

- macOS High Sierra is no longer supported. Only macOS Mojave (version 10.14) and Catalina (version 10.15) are supported.
- Enable single sign-on with OpenID Connection (OIDC) authentication for Azure.

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- Monitor and manage user connections from the User Connection Monitor.
- Monitor and manage database connections from the Database Connection Monitor.
- Monitor and manage subscriptions from the Subscription Monitor.
- Monitor and manage Intelligent cubes from the Intelligent Cube Monitor.
- Additional server and project-level administrative settings migrated from Developer to Workstation. See the following topics for more information:
  - Edit Server-Level Governing Settings
  - Edit Server-Level Security Settings
  - Edit All Server-Level Settings
  - Edit Application-Level Cache and Intelligent Cube Settings
  - Edit All Application-Level Settings
- Improved performance when using percentile functions. See KB484742 for more information.
- Enhanced formatting properties when creating documents.
- Dossier enhancements, including:
  - Create dossier-level filters to filter data across multiple chapters or an entire dossier.
  - Visualization Gallery moved to top toolbar to showcase nine new one-click Bar charts, three new one-click Line/Area charts, and provide more authoring space.
  - Compare two or more metric values in a Bar chart using a common scale with the new Synchronized Axis Bar chart or right-mouse-clicking on a dual-axis chart.

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- Enhanced Pie and, new out-of-the-box, Ring chart with optimized use of container blank space, improved data labels with leader lines, and option to show as a percentage.
- Allow multiple selections for data labels in pie, circle, and bar charts.
- Sort pie and ring charts in ascending or descending order.
- New Waterfall chart supports Show Difference and Show Sum modes to display data intuitively, as well as an option to hide or show the connection line.
- Build Geospatial Service visualizations with the following new styles:
  - Border: Display only geographic borders and no terrain details. Use a background color or image to make the data pop.
  - Focused: Focus only on the geographic area where you have data, without surrounding areas distracting the view.
- New Format panel option to disable panning, zooming, tilting, and rotating of Geospatial Service visualizations.
- New Format panel option to disable the Geospatial Service visualization toolbar.
- Sort and filter the attributes/metrics in the Dataset panel with new one-click filtering options for derived metrics, geo-attributes, unused objects, objects used on selected visualization, and more.
- Create dynamic default filters based on the First N / Last N element(s).
- Support passing filter selections and answer prompts while linking from text boxes and images.
- Change the fill color opacity for text boxes, grids, and containers to customize transparency.
- Add shapes to the canvas from the top toolbar to visually group elements, help frame a visualization, or create a layered effect.

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- Smarter labels for most visualizations to improve readability and design.
- Additional visualization formatting flexibility through x-axis label rotation and word wrap.
- Enhanced grid sorting to support working with totals, as well as allowing users to specify nested, absolute, and level grid sorting on metrics.
- Hide or show the Metrics header text in a grid visualization.
- Select and copy individual grid cells contents and URLs to the clipboard.
- Customize the position of hierarchical attribute parent elements above or below child elements in grids. This feature only applies to MDX/OLAP sources for hierarchy reporting.
- Import measures as regular dimensions when using Oracle Essbase MDX/OLAP sources for hierarchy reporting.
- Support a new MDX/OLAP data source of Kyvos 2020.2.4 for hierarchy reporting.
- Add metrics to rows in compound grids.
- Use compound grid visualizations to filter data in other visualizations.
- Enable vertical scrolling in free-form layout dossiers.
- Hide or show visualization containers for mobile views in free-form layout.
- Use the keyboard to move and delete, disable auto-snapping, and select all layers under free-form layout dossiers.
- Export dossiers to PDF while in presentation mode.

MicroStrategy Web

- Export hierarchy reports to Excel with the hierarchy structure and levels preserved.

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- A new feature flag called **Customize the Position of Parent Elements** appears on the General Preferences page. Administrators can turn on this feature flag to allows users to customize the position of hierarchical attribute parent elements above or below child elements in dossier grids. The default setting is **Off**.
- Improved performance when using percentile functions. See KB484742 for more information.
- Dossier enhancements, including:
  - Create dossier-level filters to filter data across multiple chapters or an entire dossier.
  - Visualization Gallery moved to top toolbar to showcase nine new one-click Bar charts, three new one-click Line/Area charts, and provide more authoring space.
  - Compare two or more metric values in a Bar chart using a common scale with the new Synchronized Axis Bar chart or right-mouse-clicking on a dual-axis chart.
  - Enhanced Pie and, new out-of-the-box, Ring chart with optimized use of container blank space, improved data labels with leader lines, and option to show as a percentage.
  - Allow multiple selections for data labels in pie, circle, and bar charts.
  - Sort pie and ring charts in ascending or descending order.
  - New Waterfall chart supports Show Difference and Show Sum modes to display data intuitively, as well as an option to hide or show the connection line.
  - Build Geospatial Service visualizations with the following new styles:
    - Border: Display only geographic borders and no terrain details. Use a background color or image to make the data pop.

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    - Focused: Focus only on the geographic area where you have data, without surrounding areas distracting the view.
- New Format panel option to disable panning, zooming, tilting, and rotating of Geospatial Service visualizations.
- New Format panel option to disable the Geospatial Service visualization toolbar.
- Sort and filter the attributes/metrics in the Dataset panel with new one-click filtering options for derived metrics, geo-attributes, unused objects, objects used on selected visualization, and more.
- Create dynamic default filters based on the First N / Last N element(s).
- Support passing filter selections and answer prompts while linking from text boxes and images.
- Change the fill color opacity for text boxes, grids, and containers to customize transparency.
- Add shapes to the canvas from the top toolbar to visually group elements, help frame a visualization, or create a layered effect.
- Smarter labels for most visualizations to improve readability and design.
- Additional visualization formatting flexibility through x-axis label rotation and word wrap.
- Enhanced grid sorting to support working with totals, as well as allowing users to specify nested, absolute, and level grid sorting on metrics.
- Hide or show the metric header text in a grid visualization.
- Select and copy individual grid cells contents and URLs to the clipboard.
- Customize the position of hierarchical attribute parent elements above or below child elements in grids. This feature only applies to MDX/OLAP sources for hierarchy reporting.

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  - Import measures as regular dimensions when using Oracle Essbase MDX/OLAP sources for hierarchy reporting.
  - Support a new MDX/OLAP data source of Kyvos 2020.2.4 for hierarchy reporting.
  - Add metrics to rows in compound grids.
  - Use compound grid visualizations to filter data in other visualizations.
  - Enable vertical scrolling in free-form layout dossiers.
  - Hide or show visualization containers for mobile views in free-form layout.
  - Use the keyboard to move and delete, disable auto-snapping, and select all layers under free-form layout dossiers.
  - Export dossiers to PDF while in presentation mode.
- Enhanced security when using the MicroStrategy Connector. To take advantage of the improved MicroStrategy Connector, enable CORS settings on your Library Server.

MicroStrategy Library

- Share bookmarks to keep your team updated with more in-depth insights.
- Collaborate with direct messages that allow users to start discussions with individuals or groups.
- Search for objects both inside and outside of Library with global search.
- Add dossiers or documents to the Favorites section for quick navigation.
- Create uniquely named and personalized groups to organize content.
- Enable or disable the view of the Comments and Discussion panel across environments.
- Improved PDF generation response time when exporting from a dossier.

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- Select and copy individual grid cells contents and URLs to the clipboard.
- Export dossiers with table of contents and grid pagination.
- Enable auto-fit for column width when exporting a document or dossier grid to Excel.
- Enhanced grid sorting to support working with totals, as well as allowing users to specify nested, absolute, and level grid sorting on metrics.
- Customize the position of hierarchical attribute parent elements above or below child elements in grids. This feature only applies to MDX/OLAP sources for hierarchy reporting.
- Export hierarchy reports to Excel with the hierarchy structure and levels preserved.
- Improved color contrast with a more accessible primary blue and overall color palette
- Seamlessly re-direct Library sessions to a healthy node when the current Intelligence server node is hanging or crashing.
- Allow the Library server to communicate with the MicroStrategy Modeling service when auto-configuration has failed.

MicroStrategy Library Mobile

iOS

- Use a document or dossier as the home screen to build powerful mobile experiences.
- New universal MicroStrategy Library app that can be installed on both the iPhone and iPad.
- View Library in low-light environments with support for dark mode in iOS.
- Select and change text sizes within dossier grids.

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- Share bookmarks to keep your team updated with more in-depth insights.
- Collaborate with direct messages that allow users to start discussions with individuals or groups.
- Search for objects both inside and outside of Library with global search.
- Add dossiers or documents to the Favorites section for quick navigation.
- Create uniquely named and personalized groups to organize content.
- Download multiple versions of PDF and Excel files in one single location for future reference and version comparison.
- Deep link to Library from other applications.
- Supports iOS 14.
- Export dossiers with table of contents and grid pagination.

Android

- Support for tap, tap and hold, and double tap touch gestures.
- Support for swiping gestures between dossiers pages.
- Support for multi-select touch gestures to select multiple objects.
- Share bookmarks to keep your team updated with more in-depth insights.
- Collaborate with direct messages that allow users to start discussions with individuals or groups.
- Search for objects both inside and outside of Library with global search.
- Supports Android OS 11.
- Deep link to Library from other applications.
- Export dossiers with table of contents and grid pagination.

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- Customize the position of hierarchical attribute parent elements above or below child elements in grids. This feature only applies to MDX/OLAP sources for hierarchy reporting.

MDX

- Ability to control aggregation behavior on metrics defined with a SCOPE statement with SSAS data sources for hierarchical reporting (MDX).
- Added support for Secure Network Communications (SNC) authentication method against SAP WH (MDX).
- Improved performance on hierarchical reporting against OLAP sources (MDX) through parallel execution of multiple MDX queries.
- Add dossiers with hierarchical reporting via Live connection to OLAP sources (MDX) to History List caching for faster response time.

Federated Analytics

MicroStrategy for Power BI

- Improved import performance.
- Import data in your defined locale.

MicroStrategy for Tableau

- Improved import performance.
- Use the suggested default MicroStrategy Library URL.

MicroStrategy for RStudio

RStudio Server Open Source Edition 1.2 is certified.

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MicroStrategy Packages for Python (mstrio-py)

- Support for standard and LDAP authentication using a proxy server.
- Manage server, server configuration, and cluster details.
- Use Python modules to manage schedules and subscriptions.
- Manage Library content, including dossiers and documents.
- Use sample scripts to manage applications and create users, user groups, and user security.

See the mstrio-py help for more information.

MicroStrategy for Office

- Import data from compound grid visualizations to Excel.
- View imported object and source information such as prompt answers, filters, attributes, metrics, owner, certification status, last modified date, etc., of imported data in the add-in side panel.
- Select a new import destination if the original selected range is unavailable.
- Support for OIDC authentication for Azure.

MicroStrategy Intelligence Server

- Replace a slice of data in an Intelligent cube using a single incremental cube refresh step.
- The VLDB property, *Attribute to Join When Key From Neither Side can be Supported by the Other Side* becomes obsolete once you upgrade your data engine version to 2021. See KB484738 for more information.
- Improve report and cube performance against the data warehouse by using an attribute form caching Intelligence cube.

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- Keep up to two times more In-Memory Cubes active on existing hardware using Smart Memory Usage on Intelligence Server.

MicroStrategy Platform Analytics

Configure Platform Analytics to use a custom respository database name.

MicroStrategy Integrity Manager

New modern, user-friendly page for SQL comparison in dossiers, documents, and reports.

MicroStrategy Mobile

iOS

- Supports iOS 14.
- Supports AppConfig with iOS 14.

MicroStrategy Library Mobile SDK

iOS

- When you customize Library Mobile SDK for iOS, you must have an Apple Mac, running Xcode® 12.0 with the Apple iOS SDK 14, to develop and compile your application.
- Deep link to Library from other applications.
- Preconfigure Library Mobile for iOS.

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Android

- The Library Mobile SDK for Android is certified to work with Android 11 (API level 30). When you customize Library Mobile for Android, you must have Android SDK 30 to develop and compile your application. Android Studio 3.6 and up is supported.
- Deep link to Library from other applications.

MicroStrategy Mobile SDK

iOS

When you customize MicroStrategy Mobile SDK for iOS, you must have an Apple Mac, running Xcode® 12.0 with the Apple iOS SDK 14, to develop and compile your application.

Android

The MicroStrategy Mobile SDK for Android is certified to work with Android 11 (API level 30). When you customize MicroStrategy Mobile for Android, you must have Android SDK 30 to develop and compile your application. Android Studio 3.6 and up is supported.

MicroStrategy Visualization SDK

Configure the display of the Change Visualization context menu.

MicroStrategy Embedding SDK

- More updates in error handling.
- Apply multiple filters after a dossier is rendered.
- Show or hide the shareDossier function.

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MicroStrategy REST APIs

- Identify applications to load on server startup.
- Manage filter objects.
- Create and edit email subscriptions.
- List available recipients for a given user, including Shared List and Personal Addresses.
- Execute a single subscription on demand.
- Create, update, and delete schedules.
- Manage data sources with a complete set of REST APIs.
- Ability to request DateTime data to be returned from reports, cubes, and dossiers in the ISO 8601 format.
- Ability to update page-by selections for reports.
- Enhancement to APIs returning data from reports and cubes to allow the modification of attribute and metric template positioning.
- Enhancement to APIs that execute reports, cubes, and dossiers to allow the request for asynchronous executions.
- Monitor and manage cubes. This includes viewing and changing the status of a cube.
- Additional server and application level settings from MicroStrategy Developer are available in MicroStrategy Workstation.
- Ability to request object lineage information.
- Create, list, and delete multi-content subscriptions.

MicroStrategy Cloud Platform

Improved scalability of deployments across AWS and Azure, including:

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- A new One-Node Enterprise deployment type for production-quality single node deployments that leverage scalable file storage and high availability MD instances
- The availability of one-click hotfix upgrades to M2019 Update 7 and M2020 Update 3
- The ability to stop/start/resize individual nodes within a cluster for improved vertical scalability

Amazon Web Services (AWS)

Security enhancements, including:

- Option to deploy environments with only Private IPs
- Automatic, default SSL encryption between I-server and Web server in MCP deployments for 11.3 and beyond
- Improved load balancer encryption to TLS 1.2 protocol

Enhanced global availability of MCP deployments recently expanding into the following regions:

- Middle East (Bahrain)
- Canada Central
- Sao Paulo
- EU (Stockholm)

Azure

Security enhancements, including:

- Option to deploy environments with only Private IPs
- Automatic, default SSL encryption between I-server and Web server in

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MCP deployments for 11.3 and beyond

- Improved load balancer encryption to TLS 1.2 protocol

Enhanced global availability of MCP deployments recently expanding into the following regions:

- South Central US (Texas)
- Canada Central
- Asia Southeast
- Japan East
- South Africa (North)

Installation

- The Windows and Linux debug installation log file MSTRInstall.log has been renamed to MSTRDebugInstall.log to help distinguish it from the high-level install.log. Additionally, the file has been moved to the Log directory to centralize all log collection.
- The MicroStrategy Repository is an independent component that can selected for use during installation for Platform Analytics and Collaboration server. If you want to use your own certified Postgres database, or if you have already installed the MicroStrategy Repository on another machine, a new screen allows you to connect to a remote repository instead.
- Administrators can use the Recheck button for Windows and Linux installations when missing requirements are identified. Now, the requirements can be installed, and without leaving the same installer screen, administrators can recheck these requirements and proceed when they have all been satisfied.
- MicroStrategy supports and bundles Adopt OpenJDK11 with the Linux and Windows platform installers. Fresh installations or upgrades to 2021 are

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automatically upgraded, with no further action needed. For your hosted J2EE web application servers, you must upgrade to JDK11 before deploying the new 2021 WAR files. You may also use Oracle JDK11, which is supported.

Data Sources

See *Platform Certifications* for information about the latest supported and certified configurations.

1. Gateway Certifications
    - Teradata 17
    - Oracle Cloud 19c
    - Oracle Autonomous Data Warehouse
    - SAP HANA 2.0 SPS05
    - PostgreSQL 12 & 13
    - IBM DB2 11.5
    - IBM Integrated Analytics System 1.0
    - MongoDB 4.x
    - Cloudera Data Platform (CDP) Public Cloud Base 7.1
    - Yellowbrick 4.0
2. New Gateways
    - New Cloud Object Storage Connector supporting AWS S3, Azure Data Lake Storage Gen2 and Google Cloud Storage for files in Parquet, Avro, and ORC formats.
    - New Gateway Connectors for Kyvos, Yellowbrick, IBM Integrated Analytics System (IAS).

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- New OData Connectors for SAP S/4 HANA, SAP BW/4 HANA.
- Azure SQL Data Warehouse is Azure Synapse Analytics and is certified with MicroStrategy. See the Microsoft documentation for more information.

3. OOTB Driver Updates
   - Teradata drivers are bundled out-of-the-box with MicroStrategy installation (Teradata Driver 17).
   - Snowflake drivers are bundled out-of-the-box with MicroStrategy installation (Snowflake Driver 3.12.11 (JDBC) and 2.21.2 (ODBC)).
   - SAP Hana Drivers are bundled out-of-the-box with MicroStrategy installation (SAP Hana Driver 2.6).
   - MicroStrategy 2021 ships the latest drivers for all gateways MicroStrategy shipped out-of-the-box optimizing security and performance.
4. Gateway Deprecation
   - Some connectors are deprecated.
5. Security and Performance Enhancements
   - Support Kerberos, certificate-based authentication, and scram-sha-256 for password encryption of PostgreSQL. See KB484539, KB484540, and KB484541 for more details.
   - TLS configuration is supported in GUI and command line mode for all gateways that MicroStrategy ships out-of-the-box in the Connectivity Wizard. (SAP HANA excluded) See KB42495 for more information.
   - Secure SQL Execution using parameterized queries has been enabled by default for the following data sources: Amazon Redshift, IBM Db2, Oracle, Teradata, PostgreSQL, SAP HANA, Snowflake, Google BigQuery, MySQL, Yellowbrick, MemSQL, IBM IAS, IBM IPS,

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IBM Netezza, and Amazon Aurora PostgreSQL Compatible. See KB484512 for more information.

- Implement unified quoting with Diamond and Platinum gateways as well as select gold gateways - PostgreSQL, Amazon Aurora PostgreSQL, Yellowbrick, IBM Integrated Analytics System, IBM Netezza, and IBM Performance Server for PostgreSQL.
- The calculation of the DateDiff function has been pushed to the gateway side for SQL Server, Azure Synapse Analytics, and Amazon Redshift. To incorporate this change, you must update your metadata and schema. This change increases performance when executing reports and live dossiers or when publishing cubes against SQL Server or Amazon WH when DateDiff calculations are used.
- The calculation of the Percentile function has been pushed to the gateway side for all Diamond and Platinum data sources. To incorporate this change, you must update your metadata and schema. This change increases performance when executing reports and live dossiers or when publishing cubes when Percentile calculations are used.
- Snowflake - Improved live connections (report/cube) throughput performance by up to three times by updating the default Intermediate Table Type to Derived Table.

6. Functionality Enhancements

- Extended Connectivity Wizard DSN creation for Google BigQuery, Apache Spark SQL, Hive, Impala, Teradata, and Snowflake.
- Google BigQuery gateway supports billing project and catalog browsing by namespace.
- Seamless Authentication for JDBC and ODBC drivers leveraging OAuth workflow. For example, Snowflake and Google BigQuery.

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- New report searching functionality for Salesforce Report gateway connector. See KB484556 for more information.
- Network proxy support for MicroStrategy Community Connectors.
- Support HTTP connection (proxy connection) for relational gateways.

Privileges

See Privileges by License Type for information about license types and associated privileges.

A few privileges have been migrated between license groups.

- The following privileges have been moved from Client-Web to Client-Reporter:
  - Web add to History List
  - Web execute datamart report
- The following privileges have been moved from Server-Intelligence to Server-Reporter:
  - View History List
  - Save personal prompt answers
- The following privilege has been moved from Client-Web to Server-Distribution:
  - Web subscribe to History List

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Platform Certifications

Strategy strives to certify the current and previous major version of any product that it integrates with. This is intended to help customers with their upgrade cycles of all technologies involved. This document provides a list representing a snapshot of certified technologies for the current version of Strategy One.

Each product that Strategy One integrates with comes with its own unique convention of specifying a version of its product. Unless specified in the comments a certification extends to all minor versions and includes all editions. Strategy recommends following each product vendor's best practices for applying all publicly available security patches, services packs, etc.

Click here to view a dossier that lists what is certified and/or supported in Strategy One.

See Drivers and Connectors for a list of external sources and their associated drivers supported by Strategy.

General Certification Notes:

- JRE 17 is bundled in with the Strategy platform
- For Library mobile, Strategy recommends downloading and using our official Library mobile apps for iOS and Android.
- For iOS, Strategy certifies the two latest major versions. The latest major version is the recommended version and will be certified as platinum. For example, Strategy runs end-to-end regression and performance testing as soon as the version is generally available and once again for each quarterly release.
- For Android, we certify the three latest major versions. The latest major version is the recommended version and will be certified as platinum. For example, Strategy runs end-to-end regression and performance testing as

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soon as the version is generally available and once again for each quarterly release. To learn more, see KB486424: MicroStrategy Library Android Software and Hardware Requirements and Recommendations.

- Strategy only supports operating system levels that are supported by the vendor.

Certification Level	Definition
Diamond	Strategy strongly advocates for the use of these-industry-leading sources. Strategy proactively runs end-to-end regression and performance tests as soon as the source becomes generally available.
Platinum	Strategy strongly recommends this configuration. Strategy runs end-to-end regression and performance testing for every platform release as well as update releases to ensure the platform is optimized to work best with this configuration.
Gold	Strategy recommends this configuration. Strategy runs end-to-end regression testing prior to every release to ensure our platform works well with this configuration.
Silver	Strategy supports this configuration.

Resolved Defects and Enhancements

Click here to view the dashboard that lists the defects and enhancements addressed in Strategy ONE and MicroStrategy One. The resolved defects and enhancements included in the list below are related to specific customer Technical Support Cases that were reported to Strategy Technical Support. When a Technical Support case (TS Case) is logged as either a defect or an enhancement, an internal ID is also provided.

Please note that some items may be environment related and specific to each user. However, each of these items should also be applicable to users

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who may have similar environments and have not reported the defect or enhancement to Strategy Technical Support.

If a resolved defect or enhancement does not function as addressed in the environment-related to its Technical Support case or in an appropriately similar environment, please contact Strategy Technical Support with the dashboard and the relevant Technical Support Case number.

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System Requirements

The following information is intended to list minimal system requirements to support the Strategy Secure Enterprise. Determining the necessary system requirements depends on many factors including, but not limited to, the complexity of your Strategy environment, the deployment strategy of Strategy features, user community requirements, expected peak usage requirements, and response time expectations.

The Installation and Configuration Help provides installation considerations, including system sizing guidelines. See Hardware Requirements and Recommendations for more information about hardware requirements, memory space, or storage space. Strategy Professional Services also offers installation and upgrade analysis services to help you achieve your performance goals, aligning them with your overall Business Intelligence strategy.

See the following sections for detailed system requirements:

To install Strategy Secure Enterprise, download the software from the Strategy download site.

Strategy strives to certify the latest major version of any product that it integrates with. Strategy uses the following terminology when listing support for components made by third-party vendors:

- **Diamond or Platinum**: The third-party component has been actively tested with the current release and all subsequent updates after the major release. All tests were passed with no significant issues that would prevent the use of any applicable Strategy features. Strategy expects any certified third-party component to be used successfully with any and all applicable Strategy functionality.

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- **Gold**: The third-party component has been actively tested with the current release. All tests were passed with no significant issues that would prevent the use of any applicable Strategy features. Strategy expects any certified third-party component to be used successfully with any and all applicable Strategy functionality.
- **Silver**: A third-party component that has been listed as silver is expected to be used successfully with applicable Strategy functionality and, as such, is supported. A third-party component that is certified as silver fulfilled the following condition:



  - Testing of a given version of the third-party component has been lowered in priority to focus testing efforts on newer versions of the component or other third-party components with similar functionality. Proper functionality is implied through the comprehensive testing executed during a relevant previous release of Strategy, along with some basic coverage using the current release. This transition period provides a migration path to the newer version of the component.

Each product that Strategy integrates with comes with its own unique convention of specifying versions. Strategy recommends following the best practices provided by each product vendor for applying available security patches, service packs, etc.

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Evaluation Deployment

For an evaluation of MicroStrategy Secure Enterprise, select the Express Install option. The following minimal hardware and software requirements must be met for a successful user experience.

System Requirements

For all certified systems, see *Platform Certifications*.

Hardware Requirements for Evaluation

Although the MicroStrategy platform can be deployed across multiple machines that are networked together, the most convenient configuration for evaluation purposes is to run everything on a single laptop or desktop computer. The following are the system requirements for the MicroStrategy Express Install which will deploy and configure the full MicroStrategy platform on a single machine, typically suitable for evaluations and small teams. For information about sizing a production installation, see the Installation Considerations section in the Planning Your Installation chapter of the Installation and Configuration Guide.

- **Memory (RAM)**: 16 GB or higher
- **Minimum storage space required**: 50 GB on C drive
- **Processor**: 64-bit (minimum), 64-bit multicore (recommended)

Software Requirements for Evaluation

The following list describes the MicroStrategy Express Install software requirements:

Microsoft Windows 64-bit operating system:

- Windows Server 2019
- Windows Server 2016

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- Microsoft .NET Framework 4.7.2. This must be installed before MicroStrategy Secure Enterprise and commonly comes pre-installed with the operating system.
- Web Browser: See Web Browsers in the Certification Dashboard.
- Adobe Acrobat DC version 19.x
- For evaluating the following products, Microsoft Internet Information Services (IIS) is required
  - MicroStrategy Subscription Portal
  - MicroStrategy MDX Cube Provider

    The following components are not installed during Express Install:

    - MicroStrategy Web Server (ASP.NET)
    - MicroStrategy Mobile Server (ASP.NET)
    - MicroStrategy Web Services for Office (ASP.NET)
- For evaluating MicroStrategy Office, the following Microsoft Office (Microsoft Excel, Microsoft PowerPoint, or Microsoft Word):
  - The minimum Microsoft Office version is 2016 (Retail).
- For evaluating MicroStrategy Mobile:
  - MicroStrategy Mobile for iPhone: iOS 13.x or later
  - MicroStrategy Mobile for iPad: iOS 13.x or later
  - MicroStrategy Mobile for Android: OS 9.x or later

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Production Deployment

For a production deployment of MicroStrategy Secure Enterprise, the following minimal hardware and software requirements must be met for a successful user experience, including optimal performance and a significant number of users.

The following sections provide software requirements for the MicroStrategy Secure Enterprise platform as a whole. For all certified systems, see *Platform Certifications*.

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Servers

A successful configuration of Intelligence Server depends on a valid combination of an operating system and a CPU architecture. For example, Intelligence Server is certified to run on a machine with a Windows operating system and a 64-bit compatible CPU architecture. However, Intelligence Server is not certified or supported to run on a machine with a Windows operating system and an Intel Itanium CPU architecture.

Server Operating Systems

MicroStrategy Secure Enterprise requires 64-bit versions of operating systems.

MDX Cube Provider

The MDX Cube Provider is optimized to work with Windows Server 2012 R2 and Windows Server 2016.

LDAP Integration

MicroStrategy Secure Enterprise integrates with any LDAP v3 compliant servers.

MicroStrategy recommends the following third-party client libraries to interact with LDAP v3 servers:

- **Windows**: Native Windows SDK for LDAP (`wldap32.dll`)
- **Linux**: OpenLDAP 64-bit 2.4.x with OpenSSL

Required Linux Package

`perl`

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Specific Server Requirements

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Intelligence Server

System Requirements

For all certified systems, see *Platform Certifications*.

Hardware Requirements

RAM: 16 GB (minimum)

The minimum does not consider performance. Performance testing shows that 64 GB or more of RAM should be available for Intelligence Server to fully support and take advantage of the complete feature set, while obtaining system-wide, high performance. This level of system resources allows Intelligence Server to fully use performance-improving technologies such as Strategy OLAP Services, and to support optimal performance for Strategy Report Services documents and dashboards and the other features.

Available hard drive space: Three times the amount of RAM available to Intelligence Server. For example, an Intelligence Server that is provided 16 GB of RAM requires 48 GB of hard drive space.

For a list detailing certified and/or supported platforms and applications servers in Strategy One, see *Platform Certifications*.

Additional OS Package Requirements

The following table details required component packages not included with the installer. These may vary depending on your operating system type and version. Listed direct dependencies may also have dependencies, which will also need to be installed.

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<table>
<tr><th>Product</th><th>CPU Architecture</th><th>Version</th><th>Comments</th></tr>
<tr><td>Microsoft Windows Server</td><td>x86_64</td><td>2022
2019</td><td>No additional packages need to be installed.</td></tr>
<tr><td>Amazon Linux</td><td>x86_64</td><td>2023</td><td>The AL2023 GA version includes components from Fedora 34, 35, and 36. Some of the components are the same as the components in Fedora and some are modified.
The required packages are the same as those for RHEL and are listed below.</td></tr>
<tr><td>Red Hat Enterprise Linux</td><td>x86_64</td><td>9.x
8.x</td><td>Certification extends to derivative Linux distributions, such as CentOS.
For RHEL 9.x and 8.x, install the following packages:
<table>
<tr><th>RHEL 9.x and 8.x Package</th><th>Chrome Dependency</th><th>Description</th></tr>
<tr><td>glibc</td><td>libpthread.so.0
libdl.so.2
librt.so.1
libm.so.6
libc.so.6
ld-linux-x86-64.so.2</td><td>The GNU libc libraries</td></tr>
<tr><td>libX11</td><td>libX11.so.6</td><td>Core X11 protocol client library</td></tr>
</table>
</td></tr>
</table>

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Product	CPU Architecture	Version	Comments

RHEL 9.x and 8.x Package	Chrome Dependency	Description
libX11	libX11-xcb.so.1	Core X11 protocol client library
libxcb	libxcb.so.1	A C binding to the X11 protocol
libXcomposite	libXcomposite.so.1	X Composite Extension library
libXcursor	libXcursor.so.1	Cursor management library
libXdamage	libXdamage.so.1	X Damage extension library
libXext	libXext.so.6	X.Org X11 libXext runtime library
libXfixes	libXfixes.so.3	X Fixes library
libXi	libXi.so.6	X.Org X11 libXi runtime library
libXrender	libXrender.so.1	X.Org X11 libXrender

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Product	CPU Architecture	Version	Comments

RHEL 9.x and 8.x Package	Chrome Dependency	Description
		runtime library
libXtst	libXtst.so.6	X.Org X11 libXtst runtime library
glib2	libgobject-2.0.so.0	A library of handy utility functions
glib2	libglib-2.0.so.0	A library of handy utility functions
nss	libnss3.so	Network Security Services
nss-util	libnssutil3.so	Network Security Services Utilities Library
nss	libsmime3.so	Network Security Services
nspr	libnspr4.so	Netscape Portable Runtime

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Product	CPU Architecture	Version	Comments

RHEL 9.x and 8.x Package	Chrome Dependency	Description
cups-libs	libcups.so.2	CUPS printing system - libraries
dbus-libs	libdbus-1.so.3	Libraries for accessing D-BUS
expat	libexpat.so.1	An XML parser library
libXScrnSaver	libXss.so.1	X.Org X11 libXss runtime library
libXrandr	libXrandr.so.2	X.Org X11 libXrandr runtime library
glib2	libgio-2.0.so.0	A library of handy utility functions
alsa-lib	libasound.so.2	The Advanced Linux Sound Architecture (ALSA) library
pango	libpangocairo-1.0.so.0	System for layout and

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<table>
<tr><th>Product</th><th>CPU Architecture</th><th>Version</th><th>Comments</th></tr>
<tr><td></td><td></td><td></td><td>
<table>
<tr><th>RHEL 9.x and 8.x Package</th><th>Chrome Dependency</th><th>Description</th></tr>
<tr><td></td><td>libpango-1.0.so.0</td><td>rendering of internationalized text</td></tr>
<tr><td>cairo</td><td>libcairo.so.2</td><td>A 2D graphics library</td></tr>
<tr><td>at-spi2-atk</td><td>libatk-bridge-2.0.so.0</td><td>A GTK+ module that bridges ATK to D-Bus at-spi</td></tr>
<tr><td>gtk3</td><td>libgtk-3.so.0
libgdk-3.so.0</td><td>The GIMP ToolKit (GTK+), a library for creating GUIs for X</td></tr>
<tr><td>gdk-pixbuf2</td><td>libgdk_pixbuf-2.0.so.0</td><td>An image loading library</td></tr>
<tr><td>libgcc</td><td>libgcc_s.so.1</td><td>GCC version 4.8 shared support library</td></tr>
</table>

For RHEL 8.x, install the following package that is provided with the Red Hat Enterprise Linux installation media:

Package name: GConf2
</td></tr>
</table>

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Product	CPU Architecture	Version	Comments
			Library files: libgconf-2.so.4 Description: GConf is a process-transparent configuration database API used to store user preferences. The following information is required to install the legacy package, libnsl, on RHEL 8.x: • Package name: libnsl • Summary: Legacy support library for NIS • Library: /lib64/libnsl.so.1 The Export Engine does not support RHEL 6.9. See Installation of Export Engine to configure a different machine to use for the Export Engine.
SUSE Linux Enterprise Server	x86_64	15	For **SUSE 15** install the following packages that are provided with the SUSE Linux Enterprise Server installation media: • `cups-libs-libcups2.rpm`: HTTP/IPP communication and printer queue and job library • `libasound-libasound2.rpm`: Advanced Linux Sound Architecture Library • `libatk-1.0.so.0-libatk-1_0-0.rpm`: An Accessibility Toolkit • `libatk-bridge-libatk-bridge-2_0-0.rpm`: ATK/D-Bus bridging library • `libatk-libatk-1_0-0.rpm`: An Accessibility Toolkit • `libcairo-libcairo2.rpm`: Vector Graphics Library with Cross-Device Output Support • `libdbus-dbus-1-glib.rpm`: GLib-based library

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Product	CPU Architecture	Version	Comments
			for using D-Bus • `libdbus-libdbus-1-3.rpm`: Library package for D-Bus • `libexpat-libexpat1.rpm`: XML Parser Toolkit • `libgcc_s-libgcc_s1.rpm`: C compiler runtime library • `libgdk_pixbuf-libgdk_pixbuf-2_0-0.rpm`: An image loading library • `libgdk-3.so.0-libgtk-3-0.rpm`: The GTK+ toolkit library (version 3) • `libgio-libgio-2_0-0.rpm`: A virtual file system library API • `libglib-libglib-2_0-0.rpm`: General-Purpose Utility Library • `libglib-libglibmm-2_4-1.rpm`: C++ Interface for Glib • `libgobject-libgobject-2_0-0.rpm`: Object-Oriented Framework for C • `libgtk-libgtk-2_0-0.rpm`: The GTK+ toolkit library (version 2) • `libnss3.so-mozilla-nss.rpm`: Network Security Services • `libpangocairo-1.0.so.0-libpango-1_0-0.rpm`: Library for Layout and Rendering of Text • `libpango-libpango-1_0-0.rpm`: Library for Layout and Rendering of Text • `libsmime3.so-mozilla-nss.rpm`: Network Security Services

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Product	CPU Architecture	Version	Comments
			• `libX11-libX11-6.rpm`: Core X11 protocol client library • `libX11-xcb.so.1-libX11-xcb1.rpm`: XCB X11 protocol client library • `libX11-xcb-libX11-xcb1.rpm`: XCB X11 protocol client library • `libxcb-libxcb1.rpm`: X11 core protocol C library • `libXcomposite-libXcomposite1.rpm`: X11 protocol Composite extension client library • `libXcursor-libXcursor1.rpm`: X Window System Cursor management library • `libXdamage.so.1-libXdamage1.rpm`: X Damage Extension library • `libXdamage-libXdamage1.rpm`: X Damage Extension library • `libXext-libXext6.rpm`: Common extensions to the X11 protocol • `libXfixes-libXfixes3.rpm`: X11 miscellaneous "fixes" extension library • `libXi.so.6-libXi6.rpm`: X Input Extension library • `libXi-libXi6.rpm`: X Input Extension library • `libXrandr.so.2-libXrandr2.rpm`: X Resize, Rotate, and Reflection extension library • `libXrandr-libXrandr2.rpm`: X Resize, Rotate, and Reflection extension library • `libXrender-libXrender1.rpm`: X Rendering Extension library

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Product	CPU Architecture	Version	Comments
			• `libXss-libXss1.rpm`: X11 Screen Saver extension client library • `libXtst-libXtst6.rpm`: Xlib-based client API for the XTEST and RECORD extensions • `mozilla-nspr-mozilla-nspr.rpm`: Netscape Portable Runtime • `mozilla-nss-mozilla-nss.rpm`: Network Security Services

Additional Software Requirements on Linux OS

For additional software requirements prior to installing the Intelligence Server on a Linux operating system, see Software Requirements and Recommendations.

Notes on Support for Strategy Intelligence Server

- An X-windows enabled environment is required for the following functionality:
  - GUI-based Strategy Installation Wizard
  - Strategy Diagnostics and Performance Logging tool
  - Strategy Service Manager
- A Web browser is required for viewing readmes, release notes, and online help.

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Web Server and Mobile Server

System Requirements

For all certified systems, see *Platform Certifications*.

Strategy Web

Before you start Strategy Web, you must set up the Strategy environment which includes:

- Configuring and starting the Web server
- Running the Strategy project in an Intelligence Server-connected (three-tier) environment

Strategy Web One should only be connected to a Strategy Intelligence server of the same version or later for production purposes.

For a list detailing certified and/or supported platforms and applications servers in Strategy One, see *Platform Certifications*.

Strategy Web Server

Requirement	RAM	Disk Space	Processors
Web on Windows	4 GB or higher recommended per CPU core	0.5 GB	64-bit
Web on UNIX	4 GB or higher recommended per CPU core	3 GB on other UNIX operating systems	Red Hat and SUSE Linux: 64-bit

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Trusted Authentication

Single sign-on authentication to Strategy environments is supported using one of the following trusted authentication systems.

Product	Version
Tivoli Access Manager for e-business	6.1.1
Computer Associates Siteminder	12.5
Oracle Identity and Access Manager	11G R1
Ping Federate	7.2
SiteMinder	12.52

Library Server

System Requirements

For all certified systems, see *Platform Certifications*.

Library Web

Before you start Library Web, you must set up the Strategy environment which includes:

- Configuring and starting the Library server
- Running the Strategy project in an Intelligence Server-connected (three-tier) environment

Library Web for Strategy One, MicroStrategy ONE, or MicroStrategy 2021 should only be connected to a Strategy Intelligence server of the same version or later for production purposes.

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For a list detailing certified and/or supported platforms and applications servers in Strategy One, MicroStrategy ONE, and MicroStrategy 2021, see *Platform Certifications*.

Library Web Server

Requirement	RAM	Disk Space	Processors
Web on Windows	4 GB or higher recommended per CPU core	1.5 GB	64-bit
Web on UNIX	4 GB or higher recommended per CPU core	3 GB on other UNIX operating systems	Red Hat and SUSE Linux: 64-bit

Trusted Authentication

Single sign-on authentication to Strategy environments is supported using one of the following trusted authentication systems.

Product	Version
Ping Federate	7.2
SiteMinder	12.52

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MicroStrategy Identity

System Requirements

For all certified systems, see *Platform Certifications*.

MicroStrategy Identity Server

Software	Supported
Database and driver	An available MySQL 5.6, 5.7, or 8.0 database You must install the PDO MySQL extension. Java MySQL driver is provided with your Linux operating system installation.
Operating system	You must install the rpm packages for the following requirements: • mysql-connector-java, version 8.0 or later, supports a connection to MySQL.
Apache Tomcat	Supported versions are 8.5.x and 9.0.x.
JDKs	Supported versions are Oracle JDK 8 and ApacheOpenJDK 8.
Keys and certificates	To run the MicroStrategy Identity Server, you will need a SSL Certificate from a known Certificate Authority. To generate encryption keys used by the MicroStrategy Identity Server, you will need to ability to generate Certificate Signing Requests, private, public AES keys, etc. A tool like OpenSSL would meet this requirement.
Badge app	MicroStrategy 11.0, 10.10, 10.9, 10.8, 10.7, 10.6, 10.5, 10.4.x

MicroStrategy Identity Manager

Software	Supported
Database and driver	A available MySQL 5.6.x, 5.70x, or 8.0.x database You must install the PDO MySQL extension.

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Narrowcast Server

The following are the minimum hardware and software requirements for installing all Narrowcast Server components on one machine. To determine hardware requirements for clustered configurations, see the Narrowcast Server Installation and Configuration Guide.

The following information provides general guidance on hardware requirements to support the MicroStrategy product suite. Determining the necessary hardware requirements to support MicroStrategy is dependent on many factors including but not limited to the complexity of your MicroStrategy environment, the deployment strategy of MicroStrategy features, user community requirements, expected peak usage requirements, and response time expectations. Factors such as these must be considered to determine the hardware requirements for your MicroStrategy production environment.

System Requirements

For all certified systems, see *Platform Certifications*.

Narrowcast Server

Hardware	Requirement
RAM	4 GB or higher
Processor	64-bit
Disk Space	4 GB

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Collaboration Server

- Node.js 12.x (Installed with Strategy)
- PostgreSQL 11.x (Installed with Strategy)

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Clients

See the following client requirements:

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Strategy Workstation

System Requirements

For all certified systems, see *Platform Certifications*

Hardware Requirements

Hardware	RAM (Minimum)	Disk Space (Minimum)
Workstation on Windows	4 GB	8 GB

Software Requirements

The following software is automatically installed, if it is not present on the target system.

Software	Version
Microsoft .NET Framework	4.7.2
Microsoft Visual Studio C++ 2015-2022 Redistributable (x64)	14.36.32532.0
Microsoft Visual Studio C++ 2015-2022 Redistributable (x86)	14.36.32532.0
Microsoft Visual Studio C++ 2012 Redistributable	11.0.51106.1
Microsoft Visual Studio C++ 2010 Redistributable	10.0.30319.1
OpenJDK	11.0.11+9

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Strategy SDK

For hardware and software requirements, see Intelligence Server.

Strategy SDK should only be connected to a Strategy Intelligence Server of the same version or later for production purposes.

System Requirements

Library Mobile SDK

- **iOS**

  When you customize Strategy Library Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.

- **Android**

  The Strategy Library Mobile SDK for Android is certified to work with Android 16 (API level 36). When you customize Strategy Library Mobile SDK for Android, you must have Android SDK 36 to develop and compile your application. Android Studio Iguana and newer is supported.

Mobile SDK

- **iOS**

  When you customize Strategy Mobile SDK for iOS to develop and compile your application, you must have an Apple Mac with Sequoia 15.7.1 and above that uses an Intel x86 or Apple M1/M2 chip machine and runs Xcode 26.0 with Apple iOS SDK 26.0.

- **Android**

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The Strategy Mobile SDK for Android is certified to work with Android 16 (API level 36). When you customize Strategy Mobile SDK for Android, you must have Android SDK 36 to develop and compile your application. Android Studio Iguana and newer is supported.

Strategy Environment

- The Strategy SDK includes a comprehensive set of SDKs and APIs, which are described in detail in the SDK area of Strategy Community.
- The Strategy Web SDK and any web customization can be used on any environment that has a Java Runtime Environment that is compatible with Strategy Web.
- Before you attempt to run the Strategy SDK, you need to have a Strategy project of the same release or later running in an Intelligence Server-connected (three-tier) environment.

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Compatibility and Interoperability

For best practices on compatibility and interoperability, as it relates to upgrading a Strategy system, see the Upgrade Help. Please note, our current release schedule ensures product upgrades on a monthly basis for cloud and containerized releases and a quarterly cadence for on-premise customers.

Definition of Terms

- **Compatibility:** Products that are compatible can function on the same machine without software conflicts. Installing compatible products on the same machine results in no loss of functionality for these products.

  You cannot have a combination of Strategy One or MicroStrategy ONE/2021 and pre-2021 MicroStrategy products installed on the same machine. For example, MicroStrategy Web 2020.x cannot reside on the same machine as MicroStrategy Command Manager in MicroStrategy ONE/2021. For more information, see Important Compatibility Notes. Please note that MicroStrategy ONE/2021 is the only supported platform. For more information, see Support Lifecycle.

- **Interoperability:** Products that are interoperable can function on different machines without software conflicts.

  Different versions of Strategy products are, in several configurations, interoperable when installed on different machines. However, pre-Strategy One or MicroStrategy ONE/2021 versions of clients cannot be used with the Strategy One or MicroStrategy ONE/2021 Intelligence Server.

  Connecting Strategy products to an earlier version of Strategy Intelligence server is not supported. For example, Strategy does not recommend or guarantee support for connecting MicroStrategy Developer on Strategy One or MicroStrategy ONE/2021 to a pre- Strategy One or MicroStrategy ONE/2021 Intelligence server.

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- **Certified:** The third-party component has been actively tested with the current release.
- **Supported:** A third-party component that has been listed as supported is expected to be used successfully with any and all applicable Strategy functionality.

Important Compatibility Notes

The following provides an overview of several important compatibility considerations.

- **Newer and older products on the same machine:** Strategy One or MicroStrategy ONE/2021 products are not compatible on the same machine with earlier versions of Strategy products. If you attempt to install a Strategy One or MicroStrategy ONE/2021 product on a machine that currently has a pre-2021 product installed, the Strategy Installation wizard prompts you to upgrade every Strategy product on that machine to Strategy One.
- **Intelligence server and metadata:** Strategy Intelligence server and metadata versions should always match. That is, the metadata must be upgraded to Strategy One/2021 to use Strategy Intelligence server on Strategy One/2021. In direct connection deployments, client products (such as MicroStrategy Developer) should also be updated to the newer version of Strategy Intelligence server.
- **Strategy Library and the Intelligence server** should operate on the same version, including the same update version.
- **Narrowcast server (NCS) and the Intelligence server:** Narrowcast versions below MicroStrategy ONE (September 2024) are incompatible with Intelligence server versions between MicroStrategy ONE (September 2024) and Strategy One (March 2025). Strategy suggests that Narrowscast and Intelligence servers run the same version for optimal compatibility.

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- **All clients** such as Mobile, Workstation, and so on have:
  - Full feature support in the same version, including the same update version.
  - Interoperability/backward compatibility for older versions across supported platforms.
  - Strategy recommends upgrading client products to the same version of Intelligence server. Starting in Strategy One (May 2025), clients including Developer, Object Manger, User Merge Wizard, Project Merge Wizard, and Repository Translation Wizard require the same or higher monthly version to connect to the Intelligence server. For example, if your Developer instance is on version 11.5.5, you can connect to the Intelligence server version 11.5.5. If your Developer instance is on version 11.5.4, you can not connect to the Intelligence server version 11.5.5.

    If you are using Strategy One (February 2025), Developer clients with up to one version lower than the Intelligence server are able to connect. For example, Developer on 11.4.x can connect to Intelligence server 11.5.x. However, Developer on 11.3.x is not allowed to connecto to Intelligence server on 11.5.x. Prior to Strategy One (February 2025), Developer on 11.4.x or 11.3.x is not allowed to connect to Intelligence server on 11.5.x. Refer to each client in *Compatibility Scenarios* for more details.

Compatibility Scenarios

Strategy One or MicroStrategy ONE/2021 is the only supported platform and as such all Strategy One or MicroStrategy ONE/2021 products are compatible with each other. While it is possible to install all Strategy One or MicroStrategy ONE/2021 products on the same machine, Strategy recommends installing products and groups of products on separate machines and dedicated server machines as determined by your production environment requirements. For more information on various production deployment scenarios, see Installation and Configuration Help.

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Analytics Modules

The MicroStrategy Tutorial project has been tested on a warehouse and metadata in Microsoft Access. Some database-specific object definitions may need to be changed if Tutorial is used on another platform.

Command Manager

A project source is required to run MicroStrategy Command Manager and connect to a metadata repository. MicroStrategy Developer and MicroStrategy Command Manager can be installed on the same machine, or on different machines.

Administrators do not need to install Narrowcast server on the machine where Command Manager is installed to be able to manage a Narrowcast server system.

For full feature compatibility and operability, it's recommended to keep Command Manager and Intelligence server on the same version.

Enterprise Manager

A project source is required to run MicroStrategy Enterprise Manager and connect to a metadata repository.

MicroStrategy Developer and MicroStrategy Enterprise Manager can be installed on the same machine, or on different machines.

Integrity Manager

While Integrity Manager is certified to run against various Intelligence server versions, to ensure proper functionality, workflows created in Integrity Manager should be opened, deployed, and used with versions currently supported by Strategy. See Support Lifecycle for a list of supported and expired Strategy releases.

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MicroStrategy Application

MicroStrategy Application is no longer supported after the MicroStrategy 2021 Update 10 release. Please refer to this announcement for more information.

MicroStrategy Developer

MicroStrategy Developer on MicroStrategy ONE/2021 is interoperable with the MicroStrategy ONE/2021 Intelligence server. Starting in Strategy One (May 2025), clients including Developer, Object Manager, User Merge Wizard, Project Merge Wizard, and Repository Translation Wizard require the same or higher monthly version to connect to the Intelligence server. For example, if your Developer instance is on version 11.5.9 or higher version, you can connect to the Intelligence server version 11.5.9. If your Developer instance is on version 11.5.8, you can not connect to the Intelligence server version 11.5.9. In cases where connection is not allowed, the client will throw an error and ask the user to upgrade the client first. For full feature compatibility and operability, Strategy recommends keeping MicroStrategy Developer and Intelligence server on the same version.

If you are using Strategy One (February 2025), Developer clients with up to one minor version lower than the Intelligence server are able to connect. For example, Developer 11.4.x can connect to Intelligence server 11.5.x. However, Developer on 11.3.x is not allowed to connect to Intelligence server on 11.5.x. Prior to Strategy One (February 2025), Developer on 11.4.x or 11.3.x is not allowed to connect to Intelligence server on 11.5.x.

Strategy Library

For full feature compatibility and operability, Strategy Library and the Intelligence server should operate on the same version, including the same update version. For example, they should both be on MicroStrategy ONE (June 2024).

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Operating older Strategy Library versions on newer Intelligence server versions results in partial interoperability. This means that when Library version MicroStrategy ONE (March 2024) runs on an Intelligence server version MicroStrategy ONE (June 2024), only features available in Library until MicroStrategy ONE (March 2024) are operable.

Strategy Library for Mobile

To ensure full feature support, Strategy Library for Mobile clients should be on the same version as the Strategy Intelligence server and Library server. Strategy Library for Mobile clients are interoperable with older versions of Strategy Library servers and Intelligence servers.

Compatibility is currently not supported between clients running a version older than the server instances.

Strategy Mobile

To ensure full feature support, Strategy Mobile clients should be on the same version as the Strategy Intelligence server and Mobile server. Strategy Mobile clients are interoperable with older versions of Strategy Mobile server and Intelligence servers.

Compatibility is currently not supported between clients running a version older than the server instances.

Creating a Configuration of Multiple Strategy Mobile Servers

To create a configuration that includes multiple Strategy Mobile servers, all of the Strategy Mobile servers must be the same version.

Strategy Metadata Compatibility Between Major Releases

Metadata Updates

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- Intelligence server and metadata platform versions should always match. For example, both should be on Strategy ONE/2021.
- If the metadata is older than MicroStrategy ONE/2021, a metadata update is needed before using the metadata.
- If the metadata is older than Microstrategy 10, than metadata update is *not* directly supported. You must use an intermediate version (between Microstrategy 10 and Microstrategy 2021) to update the metadata first.
- Strategy *never* supports downgrading metadata from newer version to an older version.

Object Packages and MSTR Files

Object packages and *.mstr files exported before MicroStrategy ONE/2021 can be imported to Strategy One or MicroStrategy ONE/2021.

Strategy Metadata Compatibility between Monthly and Quarterly Releases of Strategy One or Microstrategy ONE/2021 (including 2024 series)

Metadata Updates

A metadata update is not required when upgrading to a newer monthly or quarterly release, unless you plan to use features that explicitly require a metadata update.

Object Packages and MSTR Files

Object packages and *.mstr files can be migrated smoothly between all monthly/quarterly releases. This includes migration from older to newer versions, as well as from newer to older versions. However, if an object package or *.mstr file contains objects built with features that have not been implemented in the target build, this may lead to unexpected and unpredictable consequences.

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Strategy Workstation

Workstation can be installed on the Intelligence server machine, but this is highly not recommended, as there are known usability issues because of having both products on same machine.

To ensure full feature support, Strategy Workstation clients should be on the same version as the Strategy Intelligence server and Library server. Strategy Workstation clients are interoperable with older versions of Strategy Library servers and Intelligence servers.

Strategy for Office

Legacy MicroStrategy Office is no longer supported after the MicroStrategy ONE (December 2024) release. See KB487052 for more information.

The Strategy for Office add-in introduced in 2019 is not interoperable with pre-2019 releases.

Clients	Library Server and Intelligence Server		
	2019	2020	MicroStrategy ONE/2021
2019	Full feature support	Not applicable	Not applicable
2020	Interoperable	Full feature support	Interoperable
MicroStrategy ONE/2021	Interoperable	Interoperable	Full feature support

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System Manager

To ensure proper functionality, workflows created in System Manager should be opened, deployed, and used only with the same version or newer versions of System Manager.

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Installing and Upgrading

For a smooth upgrade, be sure to the review the important version-specific information regarding changes in the release that could impact functionality and performance.

Installing Strategy

See the Installation and Configuration Help for complete installation prerequisites and procedures for every MicroStrategy product. You can download the software from the Strategy download site.

Connecting to MDX Cube Sources: For instructions on how to set up SAP BW, Microsoft Analysis Services, Hyperion Essbase, or IBM Cognos TM1 connectivity in Strategy, see the MDX Cube Reporting Help.

If you encounter problems during the installation procedure, see the *Troubleshooting* appendix in the Installation and Configuration Help. If you require assistance, contact Technical Support.

Third-Party Components

When installing Strategy products on Windows environments, a set of required, third-party components are also installed. The following components are provided within a 3rdParty folder as part of the Strategy installation files, and are installed automatically for a normal installation:

Directory	Component
3rdParty\Sequelink	SequeLink Socket Server and ODBC driver 6.0
3rdParty\Triedit	Microsoft DHTML Editing Controls for Applications 1.0
3rdParty\vcredist	Microsoft Visual C++ 2015-2022 Redistributable
3rdParty\vspias	Microsoft Office 2010 Primary Interop Assemblies redistributable

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Directory	Component
3rdParty\WindowsInstaller45	Microsoft Windows Installer 4.5
3rdParty\WSE	Microsoft Web Services Enhancements 3.0 Runtime

If you perform a Strategy installation in which these third-party components are not accessible to the installation routine, a missing requirements warning can be encountered while performing an installation. Ensure that these components are accessible for the installation and attempt the installation again.

Upgrading Strategy

Who Should Upgrade?

Customers who want to use the Strategy features introduced in this release and customers who need fixes made in this release for Strategy products should upgrade:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

For a list of upgrade feature impacts and an upgrade map to track which version(s) you are moving from among different Strategy products, see the Upgrade Help.

Preparing for and Performing the Upgrade

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

When upgrading a Strategy system to a newer version, it is likely that products will be upgraded across several machines. The Upgrade Help includes best practices and instructions to ensure that your system upgrade

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adheres to the interoperability rules that Strategy has certified and listed in the *Compatibility and Interoperability* page.

Uninstalling Strategy

For details about uninstalling Strategy, see the *Adding or Removing Strategy Components* chapter of the Installation and Configuration Help.

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Product Development Methodology

Disclaimer

This document describes features and processes that are under development by Strategy. The objective of this document is to provide insight into Strategy's technology direction. The functionalities described herein may or may not be released as shown.

This document may include statements that constitute "forward-looking statements" for purposes of the safe harbor provisions under the Private Securities Litigation Reform Act of 1995, including estimates of future technology releases. Forward-looking statements inherently involve risks and uncertainties that could cause actual results of Strategy Incorporated and its subsidiaries (collectively, the "Company") to differ materially from the forward-looking statements.

Factors that could contribute to such differences include: the Company's ability to meet product development goals while aligning costs with anticipated revenues; the Company's ability to develop, market, and deliver on a timely and cost-effective basis new or enhanced offerings that respond to technological change or new customer requirements; the extent and timing of market acceptance of the Company's new offerings; continued acceptance of the Company's other products in the marketplace; the timing of significant orders; competitive factors; general economic conditions; and other risks detailed in the Company's Form 10-Q for the three months ended September 20, 2021 and other periodic reports filed with the Securities and Exchange Commission. By making these forward-looking statements, the Company undertakes no obligation to update these statements for revisions or changes after the date of this document.

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Presently, the Technology team at Strategy follows an agile product development methodology. This consists of the following groups: Scrum

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Teams, Product Owners, Product Management, Software Engineering, Software Quality, User Experience Design, Content, Localization, and DevOps.

The scrum teams are closely aligned by their deliverables, working in two-week iteration/sprint cycles that culminate in key ceremonies such as demonstrations of the increment of software delivered in a particular iteration. The “Execution Plan” is defined as six iterations comprising the engineering and quality deliverables for the calendar quarter. The development of Strategy’s products encompasses software architecture, design principles as well as a continuous validation and deployment of the software. During product development, portfolio features (“Features”) are decomposed into their constituent stories. Incremental values associated with these Features are assigned and then resources are tasked accordingly.

Strategy has central source control, versioning, branching, and code management systems across world-wide Technology centers. These systems provide governance, check-in controls, code review enforcement as well as actionable insight on development processes, code coverage, and other fundamental tenets of enterprise software delivery such as static code analysis.

Strategy maintains a centralized system for capturing all aspects of product development and quality management. Quality management includes “QA Plans” which are pre-defined automated and manual test cases that represent an array of user workflows. The centralized system captures work items from all Initiatives and Features, through user stories, tasks, and defects. Initiatives and Features are measured in points while tasks are measured in hours.

The central system is integrated with the source code repository, build process, and analytics to provide transparency for what the teams are working on, the status of those work items, and the size and nature of the source code commits. Moreover, it helps ensure traceability of requirements

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through software design, code, automation and integration testing. All of this allows for continuous integration, continuous delivery and continuous deployment. This central system is utilized by Product Management, Product Owners, Architects, Engineers, DevOps, Quality Analysts, User Experience, Content, Documentation, and Executive roles.

Release Methodology

Strategy product releases consist of monthly releases for mobile applications and desktop applications. These releases comprise new functionality and product improvements based on innovation and customer feedback. Additionally, every quarter, Strategy releases cumulative updates on top of the latest platform release. As an example, the release schedule in 2022 includes Update 5 in Q1 (11.3.5), Update 6 in Q2, Update 7 in Q3 and Update 8 in Q4. While Strategy platform releases, previously on an annual cadence, customarily deliver significant new capabilities and innovations to the market, as well as incremental product improvements, Strategy Updates focus on a select number of customer-reported items, security, performance and scalability improvements. With improvements to velocity and development practices, Strategy is able to provide the same type of scope in an Update on a quarterly basis, albeit with smaller deltas between releases. These Updates will continue to also include software quality metrics captured in the system of record for customer issues with priority, severity, impact, and pervasiveness. A typical Update cycle for Strategy consists of six iterations where aspects of the platform are validated across environments, persona-driven use cases, functionality, performance, stability, security, scalability, internationalization, compatibility, upgrade, accessibility and other release criteria. Stringent acceptance criteria for these aspects of product quality are reviewed and validated

Strategy also has an escalation process whereby customers can escalate critical issues through their Account Executive and Customer Support liaisons. In addition to the regularly scheduled Updates, Strategy reviews these escalations frequently and may issue software patch releases in

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response. Strategy patch releases generally roll up cumulatively into the next available Strategy Update and into the next Strategy Platform release.

Quality Programs

Features have stated Acceptance Criteria that typically account for functionality, performance, reliability, security, scalability, internationalization, compatibility, upgrade, and/or accessibility considerations. Before Features are approved into the execution plan, the definition, engineering design, continuous integration / unit tests, architecture, UX workflows, and/or quality test plan are inspected. This methodology enforces rigor before writing code and helps eliminate ambiguity and unify user experience design, engineering, architecture, and test plans into clear goals.

These programs help ensure that throughout iterations, the work items are regularly inspected for adherence to the stated Acceptance Criteria. The overall test plan traditionally considers automated test methodologies for continuous integration tests, and automatic approve / reject based on these tests for any proposed code commit to a central, versioned source code repository.

Strategy Platform builds execute a large array of system tests across the enterprise release criteria, utilizing code quality scans and analysis to ensure integrity before the build is released to the scrum teams. The Strategy builds are presently released on Windows, Linux, Amazon Linux, Red Hat Enterprise Linux, Strategy on AWS, Strategy on Azure, iOS, OSX, and Android Operating Systems. Once a build is released to QA, the scrum teams utilize end-to-end test cases driven from key Strategy personas on the published Map of the Intelligent Enterprise as part of the validation process.

Strategy conducts regular source code security scanning, binary code security scanning, internal penetration testing and third-party independent penetration testing for security vulnerabilities. The type of vulnerabilities

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tested for are those identified by, but not limited to, the OWASP Top 10 and the SANS Top 25.

Strategy develops and maintains central deployments of its software platform. For each iteration these systems are upgraded, the data validated, and the associated performance benchmark and capacity guidelines are measured and compared against previous validation point. These systems are established through strategic relations with our customers and partners. This is termed the “Customer Validation Program”.

Strategy utilizes their own platform deployed across internal systems to execute mission-critical analytics for the organization. Key stakeholders on these internal systems routinely sign-off on the build as part of the release cycles.

Quality Programs exist to ensure that customer issues escalated to the Technology team are assessed, assigned, scheduled and resolved in a timely fashion. Senior Technology leadership regularly meet in coordination with Technical Support and Sales to ensure that the organization is aligned on the most up to date information. In these meetings, key metrics about the work items are typically reviewed, which can include age, priority, severity, impact, time to first response, and time to close. Items in this meeting are put through Root Cause Analysis (RCA) where the underlying cause for the escalated issue is identified, the problem rectified, any engineering or quality process defects are addressed and items from these sessions are added to the system of record for product development improvements.

Quality Programs partner with Enterprise Support Programs to ensure that personnel are regularly working with our customers. These may take the form of Upgrade Programs, engagement with Strategy’s Consulting department to gain experience in customer use cases, or via UX Design sessions with customers to be able to provide design input early in the development cycle.

Strategy has a robust mechanism to capture feedback from its customers through its Field organization with the intent of roadmap steering and early

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previews of the Technology strategic direction. This extends to many strategic customer roadmap reviews. Many of the current items on the platform roadmap are a direct result of feedback from these sessions, as well as Enterprise Support and UX Engagements, customer intelligence from Support and from the account teams working in concert to advocate on behalf of the customer.

Product Development Inspection Points

The following table comprises the key agile inspection points and outputs from the Product Development lifecycle at Strategy.

Inspection	Description
Release Planning	A transparent and inclusive synchronized planning ceremony that allows stakeholders and teams to understand the objectives, align the deliverables to the corporate vision, and commit to delivering a high-quality product to ensure customer success.
Release Readiness	Organization-wide inspection of acceptance criteria, product development Key Performance Indicators through the lenses of engineering architecture, user experience, customer work items, functionality, performance, scalability, security, internationalization, upgrade, compatibility, accessibility. CXO-level meeting to ensure transparency of deliverables.
Triage Defects	Daily activity for the team to review incoming and open defects, understand their impact, analyze for patterns, prioritize and schedule. Customer defects are reviewed first to ensure thorough assessment and communication with the customer through Technical Support and the QA process.
Change Management	Ceremonies to maintain release focus, quality, and predictability of delivery by closely controlling scope that enters or exits a release once planning is completed. For each change a full impact analysis is performed across key KPI’s including value, cost, and quantified adjustments necessary to delivery execution plan.

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Inspection	Description
Iteration Planning	Rally point where the scrum team commits to the work they can deliver within the iteration. Product Owner clarifies the details of the product backlog items and their respective acceptance criteria, so the delivery team understands the requirements and define the work and effort necessary to meet the commitment.
Daily Stand Up	Daily time-boxed ceremony where the Scrum team meets to gauge the status and progress of their iteration. Team members discuss briefly the work done the day before, work planned for that day and highlights risks so the Product Owner and Scrum Master can take the necessary steps to mitigate the risks.
Scrum of Scrums	Daily time-boxed ceremony for Lead Scrum Masters, and Product Owners, and Product Managers to review progress on the iteration and release, highlight and resolve dependencies, and plan their work for any features that require cross-team effort.
Backlog Refinement	Timeboxed ceremony where the entire Scrum team aligns, understands and decomposes work items that will be introduced in the upcoming iteration. Product Owner presents a ranked backlog to the team and describe work items helping the team to understand the requirements, value proposition and acceptance criteria. The Product Owner receives input form team on dependencies, risks, assumptions, acceptance criteria, and high-level estimates that helps refine the work items prior to the Iteration Planning ceremony.
Iteration Review	Ceremony on the last day of the Iteration where the Scrum team demonstrates the completed product functionality to the rest of the team and stakeholders. It helps the team gather feedback directly from the stakeholders so adjustments can be made to upcoming iterations to align the plan with stakeholders' requirements and priorities.
Iteration Retrospective	Last Scrum ceremony in an iteration where the Scrum team meets to review performance during the iteration. The team discusses the highlights of the iteration and agrees on a plan to make improvements for the following iteration.

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Strategy Security Assurance Program

To view a PDF version of only this page, click here.

Strategy has a comprehensive security program focused on protecting your data, regardless of whether our product is deployed via our Cloud Managed Service offering or on premises. From engineering through vulnerability remediation, we are committed to ensuring that our products continually meet your business and security needs.

Certifications

- ISO 27001 Certified for Managed Cloud Enterprise
- SOC2 Type II Audit for Managed Cloud Enterprise
- Privacy Shield Compliant
- PCI DSS Compliant Cloud Platform
- Strategy fully-managed HIPAA Compliant Cloud solution
- Corporate Financial System SOX Compliant
- Product Country of Origin: United States

Personal Security

- Background checks performed on all employees
- Educational credentials validated
- Financial/credit history checked
- Criminal background checked

Security Training and Certifications for Employee

- Security principles
- Threat modeling

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- Web security and penetration testing
- Mobile security

Security Design Process

- Threat Modeling based on STRIDE and other internally developed models
- Application of security principles (e.g., “Defense in Depth”)
- Consideration of OWASP 10 vulnerabilities
- Design review by dedicated Security Engineering Team

Embedded Security Features

- User Authentication
  - OIDC
  - SAML
  - SSO
  - LDAP/AD
  - Standard (User Name/Password)
  - Kerberos
- HTTPS/TLS protection for data in transit
- AES 256-bit encryption for data at rest
- Role based access control
- Row-level security
- CSRF, clickjacking, and HTML Output Encoding (for XSS prevention)

Secure Development

- Secure Coding Standards for all languages used
- Multiple-level code review

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- Source-code static analysis
- Binary scanning of the compiled code utilizing the Veracode binary scanner
- Manual penetration testing

Third-Party Component Control

The use of third-party components is closely controlled. A formal process is enforced for the introduction of new components into the products. Independent confirmation of third-party components incorporated into the products is conducted via the Synopsys Black Duck tool. Components possessing security vulnerabilities are aggressively scheduled for upgrade or replacement.

Internal Security Testing

Throughout the development cycle, Strategy conducts internal penetration tests to validate the security of new or modified features and to re-validate the security of the existing product suite to new threats. Such testing includes the risks identified in the OWASP-10 and other known weaknesses. Threat models developed during the product design provide additional guidance for this testing.

Independent Penetration Testing

We engage multiple security firms to conduct annual, penetration tests. Tests are comprehensive in scope and utilizes both black-box testing techniques as well as white-box testing which includes full access to the product source code. Issues identified during this testing are immediately scheduled for resolution in the product on a risk-prioritized basis. Subsequent re-testing is then conducted by the security firm(s) to verify that the issues have been successfully resolved.

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Secure Release

A centralized code repository (GitHub Enterprise) is maintained for development. Repository check-ins undergo area-specific code review procedures. The building process is controlled by the DevOps team. All machines developing the product employ an enterprise-grade virus scanner updated with the latest signatures.

Security Patches and Upgrades

Security is of the utmost importance at Strategy. Vulnerabilities are treated as top priority issues and fixed in the next release. Therefore, keeping your software up to date is one of the simplest, but most important security precautions you can take to maintain your Strategy product's security. In the event of a critical security issue outside of the regular update cycle, Strategy may issue an interim patch or workaround, but upgrading will still be required to keep your deployments as secure as possible.

Reporting a Security Issue

Current Strategy customers may report potential security issues and queries via Strategy Technical Support. Researchers may submit issues via our reporting page.

For more information, please contact your account representative.

Unsupported Tools and Capabilities

To align with Strategy's ongoing efforts towards a cloud-first strategy and modernization, the following tools and capabilities are in unsupported status or will be in unsupported status in the near future. See the following table for tool support status and links for more information.

For more information on Strategy version support status, see Support Lifecycle.

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Unsupported Tools and Capabilities	Support Status	More Information
Local Mode (Workstation)	Supported through December 2025	*End of Support for Workstation Local Mode in Q4 2025*
Legacy Office Plugin	Unsupported	*End of Support for Legacy MicroStrategy Office Add-In*
R Integration Pack	Unsupported	*End of Support for R Integration Pack*
Workstation for Mac	Unsupported	*Mac for Workstation End of Support*
MicroStrategy for Jupyter	Unsupported	MicroStrategy Technical Support News - June 2024

End of Support for Workstation Local Mode in Q4 2025

As part of the Strategy cloud-first strategy and the end of support for legacy on-premise installs, the Q4 2025 Strategy release will be the final version that includes local mode in Workstation. Local Mode allows users the ability to create dashboards and embed datasets locally and save the files in their local file system for personal use without connecting to a server environment. No additional enhancements to local mode will be made in the meantime.

Workstation local mode is the last portion of a legacy on-premise approach and Strategy is focusing on a cloud powered, AI enhanced future. Removing local mode ensure administrators, analysts, and users remain continuously connected to their environment, enabling them to leverage governed data, rely on robust data storage, and share content securing using Library. Users can also then use the benefits of AI and python capabilities that are only available on Strategy Cloud.

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User Impact

- **In 2025**: Local mode remains available in Workstation but no enhancements will be made to dashboard, visualization, or gateway functionality within it.
- **Post-Q4 2025 Release**: Users will no longer be able to create dashboards locally, without connecting to a Strategy environment.
- **Recommended Actions**: Users should assess their current use of local mode in their organization and evaluate the option to upload local dashboards to a server environment. Therefore, users can continue to use their dashboards. Version of Workstation release after Q4 2025 will not be able to open the existing Strategy files.

Support and Resources

Strategy understands that the transition may require changes to your workflows. The Strategy Support team is available to assist with troubleshooting and technical assistance.

Frequently Asked Questions

Why is local mode being discontinued? Local mode no longer aligns with Strategy's product direction, which focuses on cloud-first, AI-enhance solutions that emphasize connectivity and seamless integration.

When exactly will local mode be discontinued? The Q4 2025 release will be the last version of Strategy that includes local mode capability.

What should I do if my workflow depends on local mode or MSTR files? Evaluate why local dashboards are used in your organization and assess opportunities to bring the dashboards to a connected environment. You can use your connected environment to safely store, securely share, and publish your dashboards to Library clients for Web, Mobile, and Office.

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Will there be any direct replacements for local mode? While there will not be a direct replacement, Strategy's connected, cloud-based capabilities provides more robust and scalable alternatives that Strategy encourages users to adopt.

Who can I contact for more information and support? Contact the Strategy Support team for assistance and resources tailored to your needs.

End of Support for Legacy MicroStrategy Office Add-In

Starting in December 2024, all current versions of Strategy One no longer supports the Legacy MicroStrategy Excel and PowerPoint add-ins as they rely on deprecated Microsoft .NET APIs. While some workflows may continue to function, Strategy cannot guarantee that all product issues that arise can be resolved as the APIs remain unsupported by Microsoft.

Starting in Strategy One (March 2025), the legacy Excel, PowerPoint, and Word add-ins, along with their associated web services, will no longer be included in the product installation. For example, a fresh installation of Strategy One will not display or install the legacy add-ins. However, users who need access to the legacy add-ins can perform an upgrade installation from an earlier version where the add-ins are installed. This option retains the existing files. If you upgrade from an environment that did not have the Office add-ins installed, legacy connectors are not available.

This legacy plugin has not actively been developed by Strategy for over three years. It was replaced by a new add-in, Strategy for Office 365, a modern add-in designed for Office 365 applications. Strategy is committed to ensuring the new add-in not only meets, but exceeds, the capabilities of the legacy Office add-in, providing a seamless transition. A continued investment in Strategy for Office 365 ensure ongoing enhancements and a smooth migration for users.


Strategy for Office 365 add-ins do not support Microsoft Word.

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Parity and Enhancements in Strategy for Office 365

Excel Add-In

Supported Platforms:

The Strategy for Office 365 Excel add-in remains supported on the Excel Windows desktop app and now extends support to Mac desktop and the web version of Excel, offering flexibility across various platforms.

Authentication Modes:

The Office 365 add-in continues to support standard, LDAP, and Guest authentication, while also adding advanced options like SAML (Okta, ADFS) and OIDC for enhanced security and seamless integration with identity providers of your choice.

Deployment:

The add-in now supports centralized deployment through the Microsoft 365 Admin Center, simplifying large-scale deployment and management.

Supported Object Types:

- The Office 365 Excel add-in continues to support importing various report types to Excel, including pivot tables, cross-tab reports, page-by reports, outline mode, reports with totals and subtotals, and thresholds (non-image based).
- Additionally, the Office 365 Excel add-in now supports importing datasets, Intelligent Cubes, and dashboards, expanding the scope of data you can work with directly in Excel.
- The Office 365 Excel add-in will support Document (RSD) import into Excel in 2025.

Import Workflows:

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- The Office 365 Excel add-in continues to support importing visualizations as images, reports with maintained web formatting, data preview, auto-renaming sheets, and overwriting existing data.
- New features include integrated Library browsing during import (with folder browsing and search), selecting attributes, forms, and metrics during import through the "Prepare Data" workflow, and filtering data during the import process.
- The Office 365 Excel add-in will support the import of grids in outline mode in Excel starting in December 2024.

Refreshing:

- The Office 365 Excel add-in continues to support refreshing single or multiple objects at once, and re-executing content through the refresh workflow.
- The modern add-in includes the ability to set an auto-refresh time interval.

Prompts:

The modern add-in maintains support for importing prompted objects into Excel, re-prompting multiple objects at once, and automatically reusing prompt answers.

Displaying Information:

- The Office 365 Excel add-in continues to support a tabular overview of imported content, displaying Strategy object details (such as name, owner, modification date, etc.) within the Excel worksheet, clearing data from the spreadsheet, and preventing Excel's auto-formatting of data.
- The add-in now also supports the display of Strategy object details in the Excel add-in's side panel via a setting, allowing for more customizable information views.

PowerPoint Add-In

Supported Platforms:

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The Office 365 PowerPoint add-in continues to support Windows desktop and now includes support for Mac desktop, broadening platform compatibility.

Authentication Modes:

The modern add-in maintains support for standard, LDAP, and Guest authentication, and adds new authentication options like SAML (Okta, ADFS) and OIDC for secure, modern authentication.

Deployment:

The modern add-in now supports centralized deployment through the Microsoft 365 Admin Center, simplifying large-scale deployment and management.

Supported Object Types:

The Office 365 PowerPoint add-in now supports dashboards, enabling users to include dynamic, data-driven presentations in their slides.

Import Workflows:

- The add-in continues to support importing visualizations as images, importing multiple visualizations at once, and setting the size of visualizations.
- Newly added support includes integrated Library browsing with folder browsing and searching, along with the ability to maintain visualization positions and sizes from the Library when importing.

Refreshing:

- The Office 365 PowerPoint add-in continues to support refreshing single or multiple objects at once, and re-executing all content through the refresh workflow.
- The modern add-in includes the ability to set an auto-refresh time interval.

Prompts:

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The add-in maintains support for prompted objects, re-prompting multiple objects at once, and automatically reusing prompt answers, making the process more efficient.

Displaying Information:

- The Office 365 PowerPoint add-in continues to support a tabular overview of imported content.
- The modern add-in supports the display of Strategy object details in the PowerPoint add-in's side panel via a setting, allowing for more customizable information views.

Teams App

Supported Platforms:

Strategy for Office 365 expands the supported applications of the Office integration to include Teams, unlocking the power of your data directly within your collaborative workspace.

Embedded Library Interface:

Leverage the embedded Strategy Library interface to access, analyze, and share insights without leaving the Teams environment.

Collaboration:

Share and pin Dashboards in conversations for data-driven collaboration.

Bots and Natural Language Queries:

Find answers in your data by asking Bots a question. Users can chat with a Bot directly, or add Bots to chats and channels with others, making data insights easily accessible and interactive.



To learn more about the capabilities of the modern Strategy for Office 365 offering, and for more information on transitioning from the legacy Office add-in, contact your account team or Strategy Support.

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End of Support for R Integration Pack

Starting in December 2024, all current versions of Strategy will no longer support the R Integration Pack and it will move to Unsupported status from Maintenance Development status. The R Integration Pack installer downloads the latest version of R, which is incompatible with the Strategy One platform. R does not support fetching older R versions due to a security vulnerability and therefore, Strategy can no longer support the R Integration Pack.

Strategy supports Python for many of the same data analysis, statistical computing, and integration workflows that were previously supported by the R Integration Pack. Strategy continues to invest in integrating Python with the Strategy platform.

Functionality of Python Scripts in Strategy

Statistical Analysis:

Users can perform statistical analysis using Python libraries such as Pandas, NumPy, and SciPy. These libraries provide extensive functionalities for data manipulation, statistical modeling, and analysis.

Machine Learning:

Users can implement machine learning algorithms using libraries like Scikit-learn or TensorFlow. This allows for predictive analytics and advanced data modeling directly within the Strategy environment.

Integration with mstrio Library:

The mstrio-py library can be used to interact with Strategy's REST API, allowing users to automate tasks, retrieve data, and manage objects within Strategy using Python scripts.

Script Management:

Strategy One provides a dedicated Scripts section in Workstation where users can create, manage, and execute Python scripts. This includes

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features like auto-completion, tooltips, and a gallery of sample scripts to assist users.

Python Data Source:

Users can use Python as a data source in Strategy. To set up a Python data source, users follow the same process as other data sources but write a python script instead of a SQL query. Python data sources in Strategy enable users to handle complex data integration and processing tasks.

Actions:

Dashboard creators can use a standard Python or transaction Python script to configure action buttons in modern grids. Users can then add these buttons to a column and trigger actions defined in the associated Python script for the corresponding row.

To learn more about the capabilities of Python in Strategy, and for more information on transitioning from the unsupported R Integration Pack, contact your account team or Strategy Support.

Mac for Workstation End of Support

The Strategy Workstation client for Mac is scheduled to retire by December 2023. Support for security and services updates on Workstation for Mac will remain available until June 2024. This strategy enables Strategy to refine and optimize Windows products to enhance security, boost performance, and maintain compliance.

In the MicroStrategy 2021 Update 12 release, Strategy Workstation will have a final General Availability (GA) update for Mac users. After MicroStrategy 2021 Update 12, new product features will be exclusive to Windows OS. Therefore, Strategy recommends that you migrate to Windows OS or use a virtual machine (VM) to download Workstation so that you can utilize all the latest product features. If you want to continue using Workstation on Mac, Strategy recommends upgrading to the most recent release to continue receiving security upgrades.

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Strategy Support

You can download the latest version, MicroStrategy 2021 Update 12, from the Strategy download site. Strategy will push security updates to the download site to support defects and upgrades until June 2024. You can continue to use Workstation on Mac to build dossiers and model data using the latest version.

Until June 2024 we will only consider certain security defects which can be logged using Strategy Community. All other enhancement requests or defects specific to Workstation for Mac will not be considered. Strategy Support is committed to ensure your feedback is used to steer security updates.

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Strategy Intelligence Server

Introduction

Strategy Intelligence Server delivers world-class monitoring, reporting, and analysis on one integrated platform, offering next-generation Business Intelligence capabilities for the full range of BI applications. Strategy Intelligence Server is the architectural foundation of the Strategy platform. It performs the following critical tasks for the Strategy BI platform:

- Runs queries, performs calculations, and formats reports
- Significantly improves user-perceived query performance
- Efficiently manages thousands of end-user requests (jobs)
- Serves as a central point for the Strategy metadata

The following capabilities are integrated into and run on the same machine as Strategy Intelligence Server:

- **Strategy Distribution Services** monitors data and automatically sends critical business performance information to users via email, file servers, FTP locations, and networked printers. Distribution Services is fully integrated with Strategy Intelligence Server. Therefore, it is optimized for subscription by, and delivery to, thousands of users.
- **Strategy OLAP Services** allows users to analyze data by slicing and dicing, inserting new metrics and filters, and manipulating reports in-memory without executing queries against the data warehouse. Strategy provides In-memory BI capabilities that leverage 64-bit operating systems to improve the overall performance of a BI system, regardless of the amount of data or number of users involved. Strategy OLAP Services delivers this technology via Intelligent Cubes.

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For information on OLAP Services, see the In-memory Analytics Help. Additional performance tuning best practices for OLAP Services are provided in the System Administration Help.

- **Strategy Report Services**, the enterprise reporting engine of the Strategy BI platform, enables the creation and viewing of pixel perfect, highly formatted documents, scorecards, and dynamic dashboards.
- **Strategy Transaction Services** lets you embed write-back functionality into documents and dashboards for the purposes of decision-making or initiating a transaction. Using either SQL for databases, or XQuery for Web Services applications, transactions trigger new business processes, re-allocate resources, and accelerate business activity. These transactions can include one-click approvals and denials, notes for tracking and directing business activity, and write-back to data sources in real time.

  Users of Strategy Web, Strategy Mobile for iPhone, and Strategy Mobile for iPad can employ these transaction capabilities from documents, dashboards, and Strategy Mobile applications.
- **Clustering Option** enables higher system availability and faster performance through load balancing and automatic failover.
- **MultiSource Option** allows users to seamlessly report, analyze, and monitor data across multiple sources through a single relational schema. MultiSource Option employs a multi-source ROLAP architecture that pushes calculations and data joins down to the database level. It extends the capabilities of the Strategy BI platform by facilitating deployment of BI applications and setting a solid foundation for enterprise-wide BI.

All products in the platform work in conjunction with Strategy Intelligence Server and benefit from its broad functionality. See the following documentation resources for information related to Strategy Intelligence Server:

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- Installation and Configuration Help: Provides information on how to perform the initial installation and configuration of Strategy Intelligence Server, including steps to make a connection to your data sources. This guide also provides information on the different editions of Intelligence Server.
- System Administration Help: Provides information on how to configure, administer, and fine tune Strategy Intelligence Server. For example, setting up LDAP authentication and other user and system security measures are covered in this guide.
- Functions Reference: Provides information on the library of over 150 sophisticated mathematical and statistical functions provided by Strategy Intelligence Server.
- General Information Readme: Provides information on certified and supported RDBMS platforms for warehouse, metadata, and statistics as well as the recommended ODBC drivers to use with each RDBMS platform.

Installing Strategy Intelligence Server

For steps to install Strategy Intelligence Server, see the *Installing Strategy on Windows* chapter or the *Installing Strategy on Linux* chapter in the Installation and Configuration Help.

For steps to install Strategy Intelligence Server, see the Installation and Configuration Help.

Download the software from the Strategy download site.

To support the use of a graphical user interface for Strategy tools and installing Strategy products on Red Hat Enterprise Linux 6, you must install the `libstdc++-4.4.4-XX.el6.i686` package included with your install media. If you are using Red Hat Enterprise Linux 6.1, you must also install the `libstdc++-4.4.5-XX.el6.i686`, `elfutils-libelf-devel.x86-64.rpm`, and `libXp.x86-64.rpm` packages included with your install

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media. If you are using Red Hat Enterprise Linux 6.x or 7.x, you must install `nss-pam-ldapd.i686.rpm` and `compat-libstdc++-33-3.2.3-69.el6.i686.rpm`.

You must have an Intelligence Server Universal license to install on 64-bit Windows operating systems.

If you encounter problems during the installation procedure, see the *Troubleshooting* appendix in the Installation and Configuration Help. If you require assistance, contact Strategy Technical Support.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after installing Intelligence Server.

The default folder is:

- `C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.
- `/opt/MicroStrategy/Product Name`, or `$HOME/MicroStrategy/install/Product Name` if you do not have write access to `/opt/MicroStrategy`, when installed on Linux environments.

If installing over previous versions of the product, the folder remains the same.

Directory	Contents
`\Intelligence Server`	Strategy Intelligence Server root folder

Upgrading Strategy Intelligence Server

To benefit from the latest functionality available in this version of Strategy Intelligence Server, an administrator must upgrade the system:

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- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Upgrading your Statistics Repository

Upgrading your statistics repository ensures that it is up to date with any potential new tables, columns, or other statistics enhancements. You can use the Strategy Configuration Wizard to upgrade your statistics repository. For steps to use the Configuration Wizard to upgrade your statistics repository and other Strategy components, see the Upgrade Help.

Upgrading Flash-Based Content

Adobe Flash is gradually becoming obsolete as HTML5 becomes dominant, and because of continuing concerns over security vulnerabilities in Flash technology. Strategy has made efforts to reduce the dependency on Adobe Flash in its products, such as replacing and upgrading Express Mode for documents to Presentation Mode. Presentation Mode uses HTML5 technology and features enhanced performance and a cleaner visual look compared to the deprecated Interactive Mode and Flash Mode. Flash used in Visual Insight dashboards has been replaced by HTML5. When you upgrade Strategy, Flash-based content in existing dashboards and documents continues to work without losing any functionality. For details, see Upgrade Help.

While you can continue to display existing documents in Flash Mode or that use Flash widgets, you should migrate these documents to Presentation Mode by replacing Flash widgets with DHTML widgets or graphs. In certain cases, you may also decide to rebuild an existing document as a Visual Insight dashboard to take advantage of functionality and features not available in documents. For rules to migrate Flash documents to alternatives, see Strategy and Flash Technology on the MicroStrategy Community website.

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Uninstalling Strategy Intelligence Server

For details about uninstalling Strategy Intelligence Server, see the *Adding or Removing Strategy Components* chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

Troubleshooting

The troubleshooting techniques and procedures for Strategy Intelligence Server are in the System Administration Help.

For additional information, see:

- *System Requirements*
- *Platform Certifications*
- *Compatibility and Interoperability*

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Clients

Strategy Web

Strategy Workstation

Strategy HyperIntelligence

Strategy Library

MicroStrategy Identity

Strategy Mobile

Strategy for Office

MicroStrategy Developer

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Strategy Web

Introduction

Strategy Web is an interactive, easy to use interface for all Business Intelligence (BI) reporting, analysis, and monitoring. With Strategy Web, business users perform any of or all the major styles of BI - Scorecards and Dashboards, Enterprise Reporting, OLAP Analysis, Predictive Analysis, and Alerts and Proactive Notification - within a single, unified Web interface. Business users move seamlessly between all five styles of BI and even combine multiple styles within a single report display.

Strategy Web can also be integrated with mapping services to create sophisticated Geospatial Information System (GIS) applications through the use of Strategy GIS Connectors. GIS lets business users visualize data in forms such as maps, globes, reports, and charts so that they can identify and analyze relationships, patterns, and trends in their data. This Readme includes Strategy GIS Connectors certification information in the *Platform Certifications* page. For information on how to install and configure the Strategy GIS Connectors, see the GIS Integration Help.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

Strategy Web One should be connected only to a Strategy Intelligence Server of the same version or later for production purposes. For the complete Strategy Platform Compatibility and Interoperability specification, see *Compatibility and Interoperability*.

Installing Strategy Web

For steps to install Strategy Web, see the Installation and Configuration Help.

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Review your environment to ensure compliance with supported operating systems, application servers, web servers, Java Development Kits, Java servlet engines, and hardware and software requirements. For steps to deploy Strategy Web on specific operating systems or application servers, see the *Deploying Strategy Web* chapter of the Installation and Configuration Help.

- Download the software from the Strategy download site.

- Strategy Community includes technical notes that document the history of changes to Strategy Web files between various Strategy releases. To find and review this information, search the knowledge base using a keyword.

If you encounter problems during the installation procedure, see the Troubleshooting appendix in the Installation and Configuration Help. If you require additional assistance, contact Technical Support.

Directory Structure

JSP interface: The following table lists folders and files of interest that are included in the default directory structure after deploying your Strategy Web WAR file:

Directory	Contents
\assets	Supporting files
\html	Supporting files
\images	All image files
\import	Sample files for Data Import analysis
\javascript	Interface JavaScript files
\jsp	Interface JSP code files
\plugins	Plug-in files for customizations

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Directory	Contents
\style	Interface style files
\VisFramework	Supporting files for visualizations
\WEB-INF	Configuration information for Strategy Web

ASP.NET interface: The following table lists folders and files of interest that are included in the default directory structure after an installation of Strategy Web.

Directory	Contents
\asp	.NET files
\bin	binary files
\images	All image files
\javascript	Interface JavaScript files
\plugins	Plug-in files for customizations
\resBundles	Flash descriptor files
\style	Interface style files
\swf	Supporting files for widgets
\VisFramework	Supporting files for visualizations
\WEB-INF	Configuration information for MicroStrategy Web

Upgrading Strategy Web

To benefit from the latest functionality available in this version of Strategy Web, an administrator must upgrade the system:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to MicroStrategy 2021.

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Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling Strategy Web

For details about uninstalling Strategy Web, see the *Adding or Removing Strategy Components* chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

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Strategy Workstation

Introduction

Strategy Workstation is a powerful tool that lets you administer and control both projects and environments, providing tools for data discovery and visualization. With an intuitive tool set and built-in templates, dashboard authoring embedded into Strategy Workstation makes it easy to build compelling visualizations and interactive dashboards in a matter of minutes and then easily share those dashboards with others. It's a powerful, one-stop tool, designed to bring the power of administration and design together for the individual business user.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

- **Strategy Workstation for Windows**

  MicroStrategy Developer and Strategy Workstation for Windows can be installed on the same machine, or on different machines.

- **Strategy Workstation on the Intelligence Server machine**

  Workstation can be installed on the Intelligence Server machine, but this is highly not recommended, as there are known usability issues because of having both products on same machine.

  Do not install Workstation and Intelligence Server on the same machine.

For the complete Strategy platform compatibility and interoperability specification, see *Compatibility and Interoperability*.

Installing Strategy Workstation

For steps to install Strategy Workstation, see the Workstation Help.

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Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after installing Workstation on Windows.

The default folder is:

- `C:\Program Files\MicroStrategy\<Product Name>` when installed on a 64-bit Windows environment.
- Workstation cannot be installed on a 32-bit Windows environment.

If installing over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\MicroStrategy Workstation	MicroStrategy Workstation root directory

Upgrading MicroStrategy Workstation

Before upgrading, see the Workstation Help for information about preparing for the upgrade and tasks to perform after upgrading.

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Strategy HyperIntelligence

Introduction

HyperIntelligence represents an entirely new class of applications where answers find you. These applications inject insights directly into a user's existing workflow and transforms familiar interfaces into intelligence tools—making every person, application, and device across the enterprise more intelligent.

HyperIntelligence introduces cards, new objects that are built, managed, and deployed using Strategy Workstation. These cards can be consumed in a web browser via Strategy HyperIntelligence for Web, on iOS and Android devices via the Strategy HyperIntelligence for Mobile, or on Outlook with the new Strategy HyperIntelligence for Office.

System Requirements

For all certified systems, see *Platform Certifications*.

For system requirements for HyperIntelligence for Office, see the Prerequisites for HyperIntelligence for Office.

Compatibility and Interoperability

To get the best experience, always keep your device updated with the latest version of the HyperMobile app. The HyperMobile app is supported on Android phones and tablets with **Android Nougat (Android 8.0)** or later.

To get the best experience, always keep your device updated with the latest version of the HyperMobile app. The HyperMobile app is supported on iPhones and iPads with **iOS 11** or later.

Supported Web Browsers

Strategy HyperIntelligence offers a browser extension, HyperWeb, for the latest versions of **Google Chrome** and **Microsoft Edge (Chromium-**

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based).

HyperWeb works best with the latest stable versions of each browser. We strongly recommend you update your browser regularly.

The HyperWeb extension is built to work on most web pages and applications. However, the following websites have known issues when using the extension:

- Microsoft Word Online
- Microsoft Excel Online
- Microsoft PowerPoint Online
- Google Sheets
- Google Docs
- PDF Online
- Yahoo Finance

HyperWeb cannot highlight words on top of the following HTML elements:

- Canvas
- SVG
- Input (Text type)
- Editable Fields (While typing)

Installing Strategy HyperIntelligence

To create cards, you need MicroStrategy Workstation version 2019 or later.

You can view cards by:

- Installing HyperIntelligence for Web.
- Downloading HyperIntelligence for Mobile on an iOS or Android device.

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- Adding HyperIntelligence for Office on your Outlook Desktop Application for macOS or Windows OS.

Product Documentation

- HyperIntelligence Workstation Help

  Information and instructions on effective datasets for cards, how to create cards, and edit card properties.

- HyperIntelligence for Web Help

  Instructions to install and use the HyperIntelligence Extension.

- HyperIntelligence for Mobile Help

  Information on how to use HyperIntelligence for Mobile.

- HyperIntelligence for Office Help

  Information and instructions on how to use HyperIntelligence for Office.

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Strategy Library

Introduction

Strategy Library is an interactive application of the Strategy Business Intelligence platform that lets business users harness the analytical power of Strategy in a simple, clean, and modern user interface.

Strategy Library provides Strategy reporting and analysis capabilities across all of your client interfaces, including Web, iOS, and Android devices. Strategy utilizes the intuitive workflows of these interfaces to let users explore information that is valuable to them. Strategy Library also provides application developers a new way to develop and deploy applications that is faster, easier, and more maintainable than using traditional Integrated Development Environments.

Strategy Library offers the following benefits:

- **Reduces the time to deploy new applications:** Strategy Library includes the infrastructure needed to support each new dashboard that is shared with your users so that application developers only need to focus on creating robust analytic applications once, that can be consumed across any client interface
- **Easy for non-developers to create professional applications:** Strategy dashboards do not require any coding. Using Strategy's authoring interface, applications are assembled in a point-and-click fashion that can be designed once to consume everywhere. Application designers can choose from an array of displays and controls and author content to be optimized for the change in screen size across different interfaces.
- **Easy for companies to rapidly deploy application updates:** Strategy Library uses an on-demand form of application deployment, allowing a dashboard author to make changes to specific dashboards and have those

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changes reflected in each user's Library without any additional action by the content consumer.

- **One design for all devices:** Library's ability to render the same application across different device operating systems and interfaces means less development time, less application management, and quicker support for a heterogeneous deployment of devices.

System Requirements

See *Platform Certifications* for all certified systems.

Compatibility and Interoperability

See *Compatibility and Interoperability* for best practices on compatibility and interoperability.

Collaboration Server

- Node.js 12.x (Installed with Strategy)
- PostgreSQL 11.x (Installed with Strategy)

Installing Strategy Library for Windows

- For steps to install Strategy Library components on a machine that will host your applications, see the *Installing and Configuring Strategy Library* chapter in the Installation and Configuration Help.

Directory Structure

On Windows operating systems, the default folder is:

- `C:\Program Files(x86)\Common Files\MicroStrategy\Tomcat\..\webapps\MicroStrategyLibrary` when installed on a 64-bit Windows environment.

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JSP interface: The following table lists folders and files of interest that are included in the default directory structure after deploying your Strategy Library WAR file:

Directory	Contents
\api-docs	REST API documents
\auth	Authentication files
\DashboardReact	Front end bundles
\images	All image files
\include	Supporting application files
\javascript	Interface JavaScript files
\jsp	Interface JSP code files
\plugins	Plug-in files for customizations
\style	Interface style files
\VisFramework	Supporting files for visualizations
\WEB-INF	Configuration information for Strategy Web

Help and Support

The Strategy Library Help provides information on how to use Strategy Library to view, analyze, and consume Strategy dashboards and documents.

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MicroStrategy Identity

MicroStrategy Identity is a multi-faceted enterprise solution that offers the best combination of security and convenience for accessing digital and physical assets. The first component of MicroStrategy Identity is MicroStrategy Badge; this product creates a mobile identity on your smartphone that replaces access control tools like keycards, passwords, and security tokens with a unified digital credential that does not sacrifice security. The second component is MicroStrategy Communicator, which provides identity discovery, location awareness, and two-way communication. These features can be leveraged to coordinate activities across a distributed group of users enabled with MicroStrategy Badge.

System Requirements

For all certified systems, see *Platform Certifications*.

Language Support

- You must use English characters for the installation paths of MicroStrategy Identity products.
- MicroStrategy Identity products are supported on data warehouses stored on machines with an English system locale.

Installing MicroStrategy Identity

For steps to install MicroStrategy Identity, see the Installing MicroStrategy on UNIX and Linux chapter of the Installation and Configuration Help. When installing MicroStrategy Identity, you must install the MicroStrategy Identity products on the same machine using a root access user account.

You can download the software from Intelligent Enterprise Downloads.

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Upgrade Considerations

Upgrade considerations are dependent upon both the software version from which you are starting and the version to which you are upgrading. As with other MicroStrategy solutions, MicroStrategy Identity is released on both a Platform Release and Feature Release branch, with the Platform Release being much less frequent than the Release cycle. For information on upgrade considerations, please refer to the Installation and Configuration Help.

Product Documentation

- **MicroStrategy Badge**
  - Information to implement custom features of MicroStrategy Badge and create user preferences.
- **MicroStrategy Identity Manager**
  - Information and instructions to configure MicroStrategy Identity Manager, create and manage your network of users, and integrate Identity Manager with logical systems and physical resources.
- **Developer Resources**
  - Information to create and implement custom uses of MicroStrategy Identity to support unique business needs through the use of server and mobile application programming interfaces (APIs).

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Strategy Mobile

Introduction

Strategy Mobile is an interactive interface of the Strategy BI platform that lets mobile business users harness the analytical power of Strategy through the use of their iPhone®, iPad®, and Android™ devices.

Strategy Mobile for iPhone, iPad, and Android Devices

Strategy Mobile and the Strategy Mobile Server provide Strategy reporting and analysis capabilities on iPhone, iPad, and Android devices. Strategy utilizes the intuitive interface of these mobile devices to let users explore information using touch and smart gestures. Strategy Mobile also provides application developers a new way to develop and deploy Mobile applications that is faster, easier, and more maintainable than using traditional Integrated Development Environments. Strategy Mobile offers the following benefits:

- **Reduces the time to develop new Mobile applications**: Strategy's Mobile application platform includes the infrastructure needed to support each new Mobile application, so that application developers only need to focus on creating the user experience and not on the back-end infrastructure.
- **Easy for non-developers to create professional Mobile applications**: Strategy's Mobile applications do not require any coding. Using Strategy's Mobile application platform, Mobile applications are assembled in a point-and-click fashion. Application designers can choose from an array of displays and controls that are optimized for mobile devices.
- **Easy for companies to rapidly deploy Mobile application updates**: Strategy's Mobile application platform uses an on-demand form of application deployment called "in-stream" deployment. As soon as new or

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updated applications are ready, they are instantly available to Mobile users.

- **One design for all devices**: Strategy Mobile's ability to render the same application across different mobile device operating systems means less development time, less application management, and quicker support for a heterogeneous deployment of mobile devices.

The Strategy Mobile Analysis Help provides information on how to use MicroStrategy Mobile to view, analyze, and perform other business tasks with Strategy reports and documents on a mobile device. This guide also walks you through examples of the kinds of business tasks you can perform using Strategy Mobile on your mobile device.

For steps to install Strategy Mobile on a mobile device, see the Strategy Mobile Administration Help.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility

Strategy Mobile Clients

See *Platform Certifications* for supported versions of iOS and Android operating systems.

Creating a Configuration of Multiple Strategy Mobile Servers

To create a configuration that includes multiple MicroStrategy Mobile Servers all of the Strategy Mobile Servers must be the same version. For example, you can use a Strategy One Mobile Server to create a configuration including multiple Strategy One Mobile Servers.

For the complete Strategy Platform Compatibility and Interoperability specifications, see *Compatibility and Interoperability*.

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Installing Strategy Mobile

For steps to install Strategy Mobile components on a machine that will host your Mobile applications, see the Installation and Configuration Help. For steps to install Strategy Mobile on a mobile device, see the Strategy Mobile Administration Help.

Download the software from the Strategy download site.

Directory Structure

The following tables list folders and files of interest that are included in the default directory structure after an installation of Strategy Mobile.

On Windows Operating Systems

The default folder location is:

- `C:\Program Files (x86)\MicroStrategy\<Product Name>` when installed on a 64-bit Windows environment.

If installed over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\Mobile Server ASPx	MicroStrategy Mobile Server ASPx files.
\MicroStrategy\Mobile Server JSP	MicroStrategy Mobile Server JSP files.

On UNIX and Linux Operating Systems

The default location in a UNIX or Linux environment is `/opt/MicroStrategy/<Product Name>`, or `$HOME/MicroStrategy/install/<Product Name>` if you do not have

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write access to `/opt/MicroStrategy`. If installing over previous versions of the product, the folder remains the same.

Directory	Contents
/Mobile	MicroStrategy Mobile root directory
/Mobile/MobileServer	MicroStrategy Mobile Server JSP files

Upgrading Strategy Mobile

Strategy recommends that all users of Strategy Mobile upgrade to the most recent version of Strategy Mobile. This is recommended for all Strategy Mobile deployments. There are significant enhancements to the overall user experience with Strategy Mobile.

Due to enhancements to Strategy Certificate Server, if you secure your Strategy Mobile connections through Certificate Server, you must upgrade your Certificate Server to support Strategy One Mobile applications.

Before upgrading any Strategy products, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling Strategy Mobile

For details about uninstalling Strategy Mobile, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

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Strategy for Office

Introduction

The Strategy for Office add-in enables you to use Microsoft Excel, PowerPoint, and Teams to connect to data in Strategy.

The initial version of the add-in introduces the ability to import and refresh reports and datasets from Strategy into Microsoft Excel. It supports Windows, Mac, and Office 365 Online versions of Office.

System Requirements

Excel

- A Strategy ONE/2021 Platform or newer environment with Cross-Origin Resource Sharing (CORS) enabled. Strategy for Office uses Strategy Library. For steps, see How to Enable CORS Settings.
- Strategy Workstation ONE/2021 Platform or newer to generate the manifest file. See How to Generate the Manifest File Using Workstation.
- Strategy Library server using the HTTPS protocol. You must have the appropriate certificate to use MicroStrategy Library with HTTPS protocol.
- Strategy ONE/2021 Platform or newer Intelligence server. You must have the same version of the Intelligence server and MicroStrategy Library.
- The minimum Microsoft Excel API version is 1.12. Microsoft Excel API version 1.17 or newer is required to support all MicroStrategy for Office functionality. For more information, see Excel JavaScript API requirement sets and Required Microsoft API Version per Functionality.
- The MicroStrategyLibrary/static folder must be accessible.

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- Desktop application for Microsoft Excel that supports the above mentioned Excel API version.
- Microsoft Excel Online supported in Chrome, Edge, Firefox, and Safari.
- Windows 10 or 11, macOS Sonoma (14) or Sequoia (15).

PowerPoint

- MicroStrategy Workstation ONE Update 11 or newer to generate the manifest file. See How to Generate the Manifest File Using Workstation.
- Strategy Library server using the HTTPS protocol. You must have the appropriate certificate to use Strategy Library with HTTPS protocol.
- MicroStrategy ONE Update 11 or newer Intelligence server. You must have the same version of the Intelligence server and Strategy Library.
- The minimum Microsoft PowerPoint API version is 1.5. For more information, see PowerPoint JavaScript API requirement sets.
- The MicroStrategyLibrary/static folder must be accessible.
- Desktop application for Microsoft PowerPoint 365 that supports the above mentioned PowerPoint API version.
- Windows 10 or 11, macOS Sonoma (14) or Sequoia (15).

Teams

- A MicroStrategy ONE Update 12 or newer environment with Cross-Origin Resource Sharing (CORS) enabled. Strategy Teams App uses Strategy Library. For steps, see How to Enable CORS Settings.
- MicroStrategy Workstation ONE Update 12 or newer to generate the manifest file. See How to Generate the Manifest File Using Workstation.

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- Strategy Library server using the HTTPS protocol. You must have the appropriate certificate to use Strategy Library with HTTPS protocol.
- MicroStrategy ONE Update 12 or newer Intelligence server. You must have the same version of the Intelligence server and Strategy Library.
- Microsoft Teams Web supported in Chrome and Edge.
- Windows 10 or 11, macOS Sonoma (14) or Sequoia (15)

For more information, such as supported applications and web browsers, see *Prerequisites* in Strategy for Office Help.

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

Strategy for Office supports Excel and PowerPoint via add-ins and Microsoft Teams with a custom app built for your organization.

The Strategy Excel add-in is supported in web for Chrome, Edge, Firefox, and Safari browsers, while the Teams app is supported in Chrome and Edge. Strategy recommends staying current with browser updates and upgrades to leverage the capabilities and features added in each version.

Strategy for Office also supports the desktop version of Excel, PowerPoint, and Teams on Mac and Windows.

The previous .NET Strategy Office add-in using XML and Web Services is no longer actively developed by Strategy.

Installing Strategy for Office

For steps to install MicroStrategy for Office, see Installing Strategy for Office.

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MicroStrategy Developer

Introduction

MicroStrategy Developer is the business intelligence software component that provides integrated monitoring, reporting, powerful analytics, and decision support workflow on an intuitive Windows-based interface. MicroStrategy Developer consists of the following sub-components:

- MicroStrategy Developer
- MicroStrategy Analyst
- MicroStrategy Architect
- MicroStrategy Server Administrator

Data Mining Services

MicroStrategy Data Mining Services allows organizations to use predictive functions that are natively available within MicroStrategy, or import models from third-party data mining vendors. Support is provided for the following models: Association Rules, Cluster (Center-based), Decision Tree, General Regression, Mining Model, Neural Network, Regression, Ruleset, Support Vector Machine and Time Series. Models compliant with PMML v2.1 through v4.0 are fully supported.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility

For the complete MicroStrategy Platform Compatibility and Interoperability specifications, see *Compatibility and Interoperability*.

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Installing MicroStrategy Developer

For steps to install MicroStrategy Developer, see the Installation and Configuration Help.

Download the software from the MicroStrategy download site.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after an installation of Developer.

The default folder is:

`C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.

If installed over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\Desktop	MicroStrategy Developer root directory
\MicroStrategy\Desktop\Images	Custom images used by the MicroStrategy Developer application
On a 64-bit Windows environment: \Program Files (x86)\Common Files\MicroStrategy\Log	Log directory, for diagnostics output

Upgrading MicroStrategy Developer

To benefit from the latest functionality available in this version of MicroStrategy Developer, an administrator must upgrade the system:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

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Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Developer

For details about uninstalling MicroStrategy Developer, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

Data Mining Services

- Support is provided for the following models: Association Rules, Cluster (Center-based), Decision Tree, General Regression, Mining Model, Neural Network, Regression, Ruleset, Support Vector Machine and Time Series. Models compliant with PMML v2.1 through v4.0 are fully supported. PMML models version PMML 2.0 can be supported only if any DTD (Document Type Definition) references are removed from the PMML. This can be accomplished by commenting out the DOCTYPE element. Models based on other previous versions of the PMML standard may work but this has not been verified internally.
- When executing a Training report on an Intelligence Server installed on UNIX, results may differ slightly from the same report run on an Intelligence Server installed on Windows. This is due to the differing mechanics of the operating systems and does not affect the overall accuracy of the results.

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Tools

MicroStrategy Command Manager

MicroStrategy Enterprise Manager

MicroStrategy System Manager

MicroStrategy Integrity Manager

MicroStrategy Object Manager

MicroStrategy Analytics Modules

MicroStrategy Narrowcast Server

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MicroStrategy Command Manager

Introduction

MicroStrategy Command Manager automates maintenance and other administrative operations using simple text-based commands. These commands can be compiled into script files and run from a graphical interface or from the command line. The script files can be scheduled through operating system utilities or integrated into third-party Systems Management Software, automating repetitive maintenance tasks.

Command Manager minimizes administrative costs by automating critical, time-consuming administrative tasks, such as managing users and security, purging caches, and expiring jobs. Command Manager contains over 200 commands that automate administrative tasks. Command Manager makes it easy to incorporate MicroStrategy administration into any software management system.

Other examples of tasks you can perform using Command Manager include:

- **User management**: Add, remove, or modify users or user groups; list user profiles
- **Security**: Grant or revoke user privileges; create security filters and apply them to users or groups; change security roles and user profiles; assign or revoke ACL permissions; disconnect users or disable their accounts.
- **Server management**: Start, stop, or restart Intelligence Server; configure Intelligence Server settings; cluster Intelligence Server machines; change database connections and logins; disconnect active sessions on server or project.
- **Database management**: Create, modify, and delete connections, connection mappings, logins, and database instances.

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- **Project management**: List or stop jobs; change a project's mode (idle, resume); expire and delete caches; change filter or metric definitions; manage facts and attributes; manage folders; update the project's schema; manage shortcuts; manage hidden properties; create tables and update warehouse catalog tables.
- **Scheduling**: Trigger an event to run scheduled reports.
- **Narrowcast Server administration**: Start and stop a Narrowcast Server; start, stop, and schedule Narrowcast Server services; add, modify, and remove subscription book users; define and remove user authentication.

For more information about Command Manager, see:

- System Administration Help: Instructions on how to create and execute these scripts to automate various administrative and application development tasks.
- System Administration Guide: A list of the commands available for Command Manager Runtime, which is a lightweight version of Command Manager for bundling with OEM applications.
- Command Manager Help: To access the online help, press F1 while using Command Manager.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

- Command Manager can connect to an Intelligence Server (metadata repository) either directly by scripts or by a project source. MicroStrategy Developer and MicroStrategy Command Manager can be installed on the same machine, or on different machines.
- Administrators no longer need to install Narrowcast Server on the machine where Command Manager is installed to manage a Narrowcast Server system.

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For the complete MicroStrategy platform compatibility and interoperability specification, see Compatibility and Interoperability.

Hardware Requirements

Operating System	Processor	RAM	Disk Space
Windows	64-bit	4 GB (minimum)	0.5 GB
Linux	64-bit	4 GB (minimum)	3 GB

Installing MicroStrategy Command Manager

For steps to install MicroStrategy Command Manager, see the Installation and Configuration Help.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after installing Command Manager.

The default folder is:

- `C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.
- `/opt/MicroStrategy/Product Name`, or `$HOME/MicroStrategy/install/Product Name` if you do not have write access to /opt/MicroStrategy, when installed on UNIX or Linux environments.

If installing over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\Command Manager	MicroStrategy Command Manager root directory

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Upgrading MicroStrategy Command Manager

To benefit from the latest functionality available in this version of MicroStrategy Command Manager, an administrator must upgrade the MicroStrategy system, including Command Manager and Intelligence Server:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Command Manager

For details about uninstalling MicroStrategy Command Manager, see the Adding or Removing MicroStrategy Components chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

Important Notes

- Ambiguity in filters, metrics, security filters, facts, and attribute expressions can be avoided by referring to the location of the object in the expression. Ambiguity was being caused by two or more objects having the same name but in different folders confusing the parser on which to reference. This can be solved like the following sample:

```
Create Filter "test" in folder "\" expression "[\schema objects\attributes\day]@ID=1"
```

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This avoids ambiguity if there is another "day" attribute located elsewhere in the project. Also, this provides a more efficient workaround than renaming duplicate objects.

- Report caches no longer expire automatically, you can instead invalidate report caches.
- The Alter Cache commands uses megabytes instead of kilobytes as the default unit.

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MicroStrategy Enterprise Manager

Introduction

MicroStrategy Enterprise Manager is a comprehensive tool designed to measure the success of MicroStrategy implementations.

Enterprise Manager consists of a MicroStrategy project that reports on MicroStrategy operational statistics. It includes a packaged statistics repository, a data load process that transforms the platform statistics to the repository, and the project metadata. The Enterprise Manager project contains about 128 attributes, hundreds of metrics, and nearly 400 reports. A comprehensive data dictionary can be used as the basis for creating customized analytics to meet administrative reporting requirements.

Enterprise Manager is structured into four areas of analysis.

- **User Analysis**

  Project managers can determine user adoption as well as their behavior on the system. Reports focused on user analysis provide details on which users employ custom functionality such as drilling and ad-hoc reports, as well as which reports are preferred by certain users or user groups.

- **Project Analysis**

  Project managers can obtain a detailed understanding of their projects. Reports focused on project analysis list how many reports, documents, and other objects currently exist in projects. Analysis of these objects can determine which objects are used regularly, and which users are actively contributing to the project.

- **Operational Analysis**

  System administrators gain an understanding of the operational behavior of the BI system. Reports focused on operational analysis identify error

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conditions, manage peak usage times by ensuring availability of sufficient system resources, and determine whether your resources are used effectively. Dashboards display growth rates and predict required upgrades.

- **Performance Analysis**

  Developers gain tuning insights to improve project performance. Enterprise Manager provides detailed level tuning data for individual reports, Intelligent Cubes, scheduled operations, and all other parts of the MicroStrategy platform.

You can learn more about Enterprise Manager in the following documentation resources:

- : Instructions on using Enterprise Manager to create reports and dashboards for MicroStrategy software usage.
- : A complete list of all the database tables and object definitions used in the Enterprise Manager project.

You can create, edit, execute or delete Data Load for Enterprise Manager through Command Manager script.

Compatibility and Interoperability

A project source is required to run MicroStrategy Enterprise Manager and connect to a metadata repository. MicroStrategy Developer and MicroStrategy Enterprise Manager can be installed on the same machine, or on different machines.

For the complete MicroStrategy platform compatibility and interoperability specification, see Compatibility and Interoperability.

System Requirements

For all certified systems, see *Platform Certifications*.

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Hardware Requirements

Operating System	Processor	RAM	Disk Space
Windows	64-bit	4 GB (minimum)	0.5 GB
Linux	64-bit	4 GB (minimum)	3 GB

Enterprise Manager: The transaction log is recommended to be three times the size of the original statistics data for the initial load.

Installing MicroStrategy Enterprise Manager

For steps to install MicroStrategy Enterprise Manager, see the Installing MicroStrategy on Windows chapter of the Installation and Configuration Help.

Download the software from the MicroStrategy download site.

If you encounter problems during the installation procedure, see the *Troubleshooting* appendix in the Installation and Configuration Help. If you require additional assistance, contact Technical Support.

For steps to install MicroStrategy Enterprise Manager, see the Installation and Configuration Help.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after an installation of Enterprise Manager.

The default folder is:

`C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.

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If installing over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\Enterprise Manager	MicroStrategy Enterprise Manager root directory

Upgrading MicroStrategy Enterprise Manager

To benefit from the latest functionality available in this version of MicroStrategy Enterprise Manager, an administrator must upgrade the MicroStrategy system, including Enterprise Manager and Intelligence Server. When you upgrade Enterprise Manager, you must also upgrade your statistics tables, Enterprise Manager repository, and your Enterprise Manager metadata.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Enterprise Manager

For details about uninstalling MicroStrategy Enterprise Manager, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

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Strategy Platform Analytics

Introduction

Platform Analytics is the next-generation monitoring tool that captures platform data (also known as telemetry) from your Strategy environments in real-time, and uses this data to enable a smarter administration and to provide a better experience to your Strategy users. Platform Analytics collects data from 10 areas of the Strategy platform, including environments, projects, users, cubes, and more.

Platform Analytics provides several ways to access, analyze, and act on this telemetry, including out of the box standard dashboards and native telemetry interfaces in Strategy Workstation; empowering administrators to provide a better experience to Strategy users. You can access Platform Analytics data in three different ways depending on your needs:

- **By viewing the Platform Analytics data embedded in Workstation**: One of the exciting features of Platform Analytics is that it exposes some of the data that it captures directly in the user interface of Workstation. This allows users who would otherwise not have access to the Platform Analytics project, to get access to important Strategy data. For more information, see View Dashboard Usage Activity in the Workstation Help.
- **By running the out-of-the-box Platform Analytics dashboards**: Platform Analytics ships with a Strategy project that provides out-of-the-box dashboards designed to showcase some of the data that Platform Analytics captures for each of the different system areas.
- **By creating your own dashboards**: Platform Analytics also supports the creation of self-service content (dashboards, reports, and documents) which are based on the out-of-the-box schema and application objects included in the Platform Analytics project.

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Platform Analytics and Enterprise Manager are both monitoring tools that capture data about Strategy. However, Platform Analytics is a new tool based on the latest technology, and as such, it offers the many advantages over its predecessor.

For information about how to use Strategy Platform Analytics, see Platform Analytics Help.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

Strategy Platform Analytics for Strategy One, MicroStrategy ONE, or MicroStrategy 2021 should be connected only to a Strategy Intelligence Server for Strategy One, MicroStrategy ONE, or MicroStrategy 2021 for production purposes.

Installing and Configuring Platform Analytics

For steps to install and configure Platform Analytics, see Platform Analytics Help.

Upgrading Platform Analytics

To benefit from the latest functionality available in this version of Strategy Platform Analytics, an administrator must upgrade the Strategy system, including Platform Analytics. When you upgrade Platform Analytics, you must upgrade both the Platform Analytics Project and Platform Analytics Repository.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

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MicroStrategy System Manager

Introduction

MicroStrategy System Manager lets you combine several sequential processes for your MicroStrategy environment into a single workflow that can be deployed at a scheduled time or on demand. You can create workflows for different tasks, such as installing, maintaining, and upgrading MicroStrategy environments; backing up projects; and launching or shutting down Cloud instances. These workflows can be deployed using a standard interface, an interactive command line process, or a silent configuration process.

You use System Manager to create a workflow visually, by dragging and dropping processes and linking them together. This allows you to see the step-by-step process that leads the workflow from one process to the next. This visual approach to creating a workflow can help you to notice opportunities to troubleshoot and error check processes as part of a workflow.

For more information, see the System Administration Help. Online help is also available for System Manager. You can access the online help by pressing F1 while using System Manager.

Compatibility and Interoperability

To ensure proper functionality, workflows created in System Manager should be opened, deployed, and used only with the same version or newer versions of System Manager. For example, you can use a 9.3.0 System Manager workflow with System Manager 9.3.x and later versions, but you should not use a System Manager 10 workflow with System Manager 9.3.x.

For the complete MicroStrategy platform compatibility and interoperability specification, see *Compatibility and Interoperability*.

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System Requirements

For all certified systems, see *Platform Certifications*.

Hardware Requirements for Tools

Operating System	Processor	RAM	Disk Space
Windows	64-bit	4 GB (minimum)	0.5 GB
Linux	64-bit	4 GB (minimum)	3 GB

Installing MicroStrategy System Manager

Download the software from the MicroStrategy download site.

For steps to install MicroStrategy System Manager, see the Installation and Configuration Help.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after installing System Manager.

The default folder is:

`C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.

`/opt/MicroStrategy/Product Name`, or `$HOME/MicroStrategy/install/Product Name` if you do not have write access to `/opt/MicroStrategy`, when installed on UNIX or Linux environments.

If installing over previous versions of the product, the folder remains the same.

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Directory	Contents
\MicroStrategy\System Manager	MicroStrategy System Manager root directory

Upgrading MicroStrategy System Manager

To benefit from the latest functionality available in this version of MicroStrategy Intelligence Server, an administrator must upgrade the system:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy System Manager

For details about uninstalling MicroStrategy System Manager, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

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MicroStrategy Integrity Manager

Introduction

MicroStrategy Integrity Manager automatically reviews the integrity of data across an organization's Business Intelligence (BI) system, verifying that MicroStrategy BI reports and documents use reliable data.

MicroStrategy Integrity Manager reduces the need for resource-intensive manual testing by running and comparing versions of reports and documents after data updates and throughout the BI development cycle, thereby automating regression testing. Data inconsistencies can be captured much sooner in the development cycle, saving time in report testing, user support, and issue resolution. With MicroStrategy Integrity Manager, companies can increase the scope, effectiveness, and accuracy of their data validation efforts and free developers to focus on content creation rather than manual testing. The comparison output can be analyzed in MicroStrategy Integrity Manager and as HTML and XML summary files that are generated to provide easy result distribution to other users.

Common BI ecosystem changes that require report and data validation include:

- Data warehouse loads and ETL processes
- MicroStrategy BI project migrations
- Software upgrades
- Database optimizations

The System Administration Guide provides information on how to use MicroStrategy Integrity Manager as an automated report comparison tool. Online help is available for MicroStrategy Integrity Manager. You can access the online help by pressing F1 while using MicroStrategy Integrity Manager.

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For information about how to use MicroStrategy Integrity Manager as an automated report comparison tool, see the System Administration Help.

Interoperability

MicroStrategy Integrity Manager is meant to be run as a testing tool against current and earlier versions of MicroStrategy Intelligence Server. Therefore, Integrity Manager One can be run against Intelligence Server One and all other previous versions.

Note that Integrity Manager is only certified to run against Intelligence Server versions that are currently supported by MicroStrategy. For a list of supported and expired MicroStrategy releases, see Product Support Expiration Schedule.

Compatibility

For the complete MicroStrategy Platform Compatibility and Interoperability specifications, see *Compatibility and Interoperability*.

System Requirements

For all certified systems, see *Platform Certifications*.

Hardware Requirements

Operating System	Processor	Executor	RAM	Disk Space
Windows	64-bit	MIntMgrW_64/MIntMgr_64 MIntMgrW/MIntMgr	4 GB (minimum) 1 GB (minimum)	0.5 GB (not including the result storage size)
Linux	64-bit	mstrintmgr/mstrintmgrw	4 GB (minimum)	1 GB (not including the result storage size)

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Installing MicroStrategy Integrity Manager

For steps to install MicroStrategy Integrity Manager, see the Installation and Configuration Help.

Download the software from the MicroStrategy download site.

To support the use of a graphical user interface for MicroStrategy tools and installing MicroStrategy products on Red Hat Enterprise Linux 6, you must install the `libstdc++-4.4.4-XX.el6.i686` package included with your install media. If you are using Red Hat Enterprise Linux 6.1, you must also install the `libstdc++-4.4.5-XX.el6.i686`, `elfutils-libelf-devel.x86-64.rpm`, and `libXp.x86-64.rpm` packages included with your install media. If you are using Red Hat Enterprise Linux 6.x, you must install `nss-pam-ldapd.i686.rpm` and `compat-libstdc++-33-3.2.3-69.el6.i686.rpm`.

Integrity Manager does not have to be installed on the same machine as Intelligence Server. You can install Integrity Manager on a separate machine and run Integrity Manager tests as a client application.

If you encounter problems during the installation procedure, see MicroStrategy Community and the Troubleshooting appendix in the Installation and Configuration Help. If you require additional assistance, contact Technical Support.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after an installation of Integrity Manager.

The default folder is:

- `C:\Program Files (x86)\MicroStrategy\<Product Name>` when installed on a 64-bit Windows environment.

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- `/opt/MicroStrategy/bin/<Executor Name>`, or `$HOME/MicroStrategy/install/bin/<Executor Name>` if you do not have write access to `/opt/MicroStrategy`, when installed on Linux environments.

If Integrity Manager is installed over previous versions of the product, the folder remains the same.

Directory	Contents
\MicroStrategy\Integrity Manager	MicroStrategy Integrity Manager root directory. Also serves as the default folder where Integrity Manager Test Configuration files (.mtc) are saved.
User's home directory	The default folder where Integrity Manager output files are saved.

Upgrading MicroStrategy Integrity Manager

To benefit from the latest functionality available in this version of MicroStrategy Intelligence Server, an administrator must upgrade the system:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Integrity Manager

For details about uninstalling MicroStrategy Integrity Manager, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

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Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

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MicroStrategy Object Manager

Introduction

MicroStrategy Object Manager is a consolidated interface to manage users and their object libraries across MicroStrategy Business Intelligence applications.

Object Manager makes it easy to migrate specific objects or entire projects from a development environment to separate test and production systems providing full life cycle project management for business intelligence systems. It ensures the consistency of business metadata across development, test, and production systems and provides object impact analysis.

Object Manager includes the following tools:

- **Project Merge Wizard**: Project Merge Wizard migrates all objects from a source project into a destination project using the specified object migration rules. Project merges are used to synchronize all objects in a project, such as synchronizing a testing environment with a production environment.
- **User Merge Wizard**: The User Merge Wizard combines users and their related objects from one project source. These objects include profile folders, group memberships, user privileges, security roles, and security filters, among others. Information from the user or group that is being merged is copied to the destination user or group. Then the user or group that is being merged is removed from the metadata, and only the destination user or group remains.
- **Packages**: Object Manager can create standalone package files containing MicroStrategy metadata objects and use the package files to import these objects to other MicroStrategy projects. These package files

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can be used to migrate object definitions without a live connection to a source project.

- **Repository Translation Wizard**: The Repository Translation Wizard is a utility that helps you manage object translations for a MicroStrategy project. You use the Repository Translation Wizard to extract strings from MicroStrategy metadata objects and copy the strings into a translation repository. Once the data is in the translation repository, you can use a third-party translation tool to translate the strings into the required languages or you can manually translate the strings. You can then use the Repository Translation Wizard again to import the translated strings back into the metadata and update the object properties with your translations.

  The Repository Translation Wizard is especially useful for translating many objects in a metadata at one time. Alternatively, you can translate individual objects, one at a time, using MicroStrategy Developer's functionality.

See the System Administration Help for steps to use MicroStrategy Object Manager to manage objects as they progress through your project's life cycle. Online help is also available for Object Manager. You can access the online help by pressing F1 while using Object Manager.

Compatibility and Interoperability

A project source is required to run MicroStrategy Object Manager and connect to a metadata repository. MicroStrategy Developer and MicroStrategy Object Manager can be installed on the same machine, or on different machines.

For the complete MicroStrategy platform compatibility and interoperability specification, see *Compatibility and Interoperability*.

System Requirements

For all certified systems, see *Platform Certifications*.

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Hardware Requirements

Operating System	Processor	RAM	Disk Space
Windows	64-bit	4 GB (minimum)	0.5 GB

Installing MicroStrategy Object Manager

For steps to install MicroStrategy Object Manager, see the *Installing MicroStrategy on Windows* chapter of the Installation and Configuration Help.

Download the software from the MicroStrategy download site.

If you encounter problems during the installation procedure, please see *Troubleshooting* in the Troubleshooting appendix of the Installation and Configuration Help. If you require assistance, contact Technical Support.

For steps to install MicroStrategy Object Manager, see the Installation and Configuration Help.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after an installation of Object Manager.

The default folder is:

`C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.

If installing over previous versions of the product, the folder remains the same.

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Directory	Contents
\MicroStrategy\Object Manager	MicroStrategy Object Manager root directory
\MicroStrategy\Desktop	Required MicroStrategy Developer files for MicroStrategy Object Manager

Upgrading MicroStrategy Object Manager

To benefit from the latest functionality available in this version of MicroStrategy Object Manager, an administrator must upgrade the MicroStrategy system, including Object Manager and Intelligence Server:

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Object Manager

For details about uninstalling MicroStrategy Object Manager, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

Troubleshooting Known Issues

Issues that have a prefix of S (S#####) are customer cases that can be tracked through MicroStrategy Technical Support. Those that are prefixed with T (T#####) are MicroStrategy internal issues. Internal issue numbers do not correlate to customer case numbers.

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Object Manager

- **T333899** - If you attempt to move or copy a report, and the attribute forms of an attribute used in that report are different between the source and destination projects, Object Manager will not allow you to move the report.

  Workaround: To resolve this conflict, look at the report's dependents in the source project, and find the attributes that are in conflict. Migrate these attributes to the target project with the Replace action. You can then migrate the report.

- It is not recommended that you open two instances of Object Manager on the same machine connected to the same project. Locking conflicts will occur.

- The destination project must be of the same or greater metadata version as the source project. Operations cannot be performed from a newer metadata to an older one. The destination project must be updated first.

- In the MicroStrategy architecture, each object is identified by its unique Object ID. MicroStrategy Object Manager functionality is based on the Object ID. Therefore, objects with different names in related projects could potentially be related if they have the same Object ID. This occurs when an object is individually copied from one project to another or is duplicated as part of the project duplicate operation and the name of either object is then changed.

- If a project, for example, Project B, is a duplicate of an original project (Project A) and Project B is duplicated to create Project C, Project C is compatible with Project A for Object Manager use.

- In order to maintain a simpler production and development environment, it is recommended you move the initial MDX cube reports from development to production before creating any in the production environment.

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- The preference option for table mapping has been removed. The original mapping of the source object will be maintained in the destination project.
- Project comparison does not support objects for MDX cube sources.
- Object Manager logs can be configured using the MicroStrategy Diagnostics and Performance Logging tool. These logs are part of the Source Manipulator dispatcher, within the component Client Services.
- Sample xml files for creating and importing project and configuration packages from the command line are provided in the Object Manager installation folder.
- When importing project security packages, the associated configuration package must be imported prior to importing the project security packages.
- Force Replace and Delete actions are available only for packages, to handle complex migration scenarios, and not for conflict resolution using Object Manager.
- Using the Project Comparison Wizard, you can synchronize folders between source and destination projects. Objects that are present only in the destination project can be selected for removal, except for any objects in the destination project which is a dependent object of other objects in the destination project.

User Merge Wizard

- The automatic mapping feature pre-selects users and groups with redundant names, such as DSSADMIN and DSSADMIN1.

Project Merge

- The Project Merge process locks both the source and destination projects by default. While this default behavior can be changed, it is recommended

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to lock the source and destination projects for all project merges.

- The results of a specific object, particularly the parent and child relationships of attributes, depends on the resolution of all the related attributes.
- Selecting the Keep Both setting for both the report and metric contained in the report results in a copy of the parent (the report) pointing to the original child (the metric). The copy of the child will not be used by the parent.
- Projects must have the same Schema ID and they must be updated to the same metadata version prior to the merge.
- The destination project must be of the same metadata version or older metadata version as the source project. Operations cannot be performed from a newer metadata to an older version. The destination project must be updated first.
- To run multiple project merges from the command line, add <SkipProjectMergeSourceLockingSkipProjectMergeDestConfigLocking> under OMSettingsOnOff in the Project Merge XML and make sure that the Project Merge Log file names are different in each Project Merge XML or multiple Merge sessions will not start.
- Undo functionality is not available.
- Project Merge logs can be configured using the MicroStrategy Diagnostics and Performance Logging tool. These logs are part of the Source Manipulator dispatcher, within the component Client Services.
- Force Replace and Delete actions are not available for objects in the Project Merge wizard.

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Repository Translation Wizard

- When using the Repository Translation Wizard, the translation import process does not change the object version ID and modification time of any objects that receive updated translations.

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MicroStrategy Analytics Modules

Introduction

MicroStrategy Analytics Modules are a set of packaged analytic components built using the MicroStrategy platform. The modules can be mapped to a different warehouse, used as starter kits to develop custom applications, or used as a source of reporting ideas for designing effective grid reports, graph reports, documents, and dashboards. The MicroStrategy Tutorial project and the Human Resources Analysis Module projects are available.

They consist of the following:

- **Project metadata** configured to work with the demonstration warehouse that contains the projects. These projects are tuned for a Microsoft Access warehouse.
- **Demo warehouses** in Microsoft Access, one for each module, allow evaluation and development without having to set up a warehouse.
- **Reference Guide** is the master document for each of the modules. The document includes details of each report, listings of metrics, attributes, and other objects, the logical data model, and a data dictionary.
- **Physical Data Model** is the default schema in Erwin format that can be used to generate scripts for creating tables and/or as an initial design for a new data warehouse.

MicroStrategy Tutorial

The MicroStrategy Tutorial is an interactive product demonstration designed to showcase the rich functionality of MicroStrategy ONE. The tutorial is composed of a MicroStrategy project, MicroStrategy Tutorial (a metadata and sample data are included). This project contains out-of-the-box reports to demonstrate the various features of MicroStrategy ONE. Information on the MicroStrategy Tutorial project is provided in the Project Design Help.

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System Requirements

For all certified systems, see *Platform Certifications*.

Installing MicroStrategy Analytics Modules

For steps to install the MicroStrategy Analytics Modules, see the Analytics Modules Installation and Porting Guide.

Review the following information:

- You can log in to the Analytics Modules project source (called the MicroStrategy Analytics Modules in Developer) as "Administrator" with no password to connect to the projects.
- You can use the Project Duplication tool in MicroStrategy Developer to export any of the projects from the MicroStrategy Analytics Modules metadata to any MicroStrategy-certified database platform. For information about duplicating or moving projects, see the System Administration Guide.
- Project-level VLDB properties must be updated depending on the database used. In some cases, adjusting additional report-level settings may be required.

 Download the software from the MicroStrategy download site.

If you encounter problems during the installation procedure, please see *Troubleshooting* in the Troubleshooting appendix of the Installation and Configuration Help. If you require additional assistance, contact Technical Support.

Directory Structure

The following table lists folders and files of interest that are included in the default directory structure after an installation of MicroStrategy Analytics Modules.

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In addition to the files listed in the table below, common files needed to run MicroStrategy are placed in the following directories by default:

- When installed on 64-bit Windows environments: `C:\Program Files (x86)\Common Files\MicroStrategy\`

If installing over previous versions of the product, the folder remains the same.

Analytics Modules Directories

Directory	Contents
`\MicroStrategy\Analytics Modules\`	Analytics Modules and Tutorial metadata
`\MicroStrategy\Analytics Modules\HRAM\`	Human Resources Analysis Module sample warehouse and documentation
`\MicroStrategy\Analytics Modules\DocumentObjects\`	HTML layouts for document objects and subfolders for images

Analytics Modules Files

Files	Description
`Analytics_ Metadata.mdb`	Metadata in Microsoft Access format for the Analytics Modules projects and the Tutorial project
`HRAM_WH.mdb`	Sample warehouse for HRAM in Microsoft Access

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Tutorial Reporting Directories

Directory	Contents
\MicroStrategy\Tutorial Reporting\	Tutorial databases & document html layout files
\MicroStrategy\Tutorial Reporting\CSVFiles\	Tutorial CSV files and other data files
\MicroStrategy\Tutorial Reporting\Images\	Tutorial graphics
\MicroStrategy\Tutorial Reporting\XSLs\	Tutorial XSL files
\MicroStrategy\Tutorial Reporting\WebUniversal	Document html layout files for Web
\MicroStrategy\Tutorial Reporting\WebUniversal\Images\	Tutorial graphics
\MicroStrategy\Tutorial Reporting\WebUniversal\XSLs\	Tutorial XSL files

Tutorial Reporting Files

File	Description
TUTORIAL_DATA_7200.mdb	Tutorial sample data database in Microsoft Access

Upgrading MicroStrategy Analytics Modules

Customers who want to use the MicroStrategy features introduced in this release and customers who need fixes made in this release for MicroStrategy products should upgrade:

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- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

Uninstalling MicroStrategy Analytics Modules

For details about uninstalling the MicroStrategy Analytics Modules, see the *Adding or Removing MicroStrategy Components* chapter of the Installation and Configuration Help.

For detailed information, see:



MicroStrategy System Requirements.

MicroStrategy Compatibility and Interoperability.

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MicroStrategy Narrowcast Server

Introduction

MicroStrategy Narrowcast Server is a proactive information delivery server that distributes personalized business information to users via email, printers, file services, SMS, and mobile devices.

System Requirements

For all certified systems, see *Platform Certifications*.

Compatibility and Interoperability

For the complete MicroStrategy platform compatibility and interoperability specification, see *Compatibility and Interoperability*.

Installing MicroStrategy Narrowcast Server

MicroStrategy Narrowcast Server is composed of a Delivery Engine and a Subscription Portal. The Delivery Engine and Subscription Portal can be installed on the same machine or on different machines. This is specified by selecting the appropriate options during product installation on each machine in the system. For steps to install MicroStrategy Narrowcast Server, see the Narrowcast Server Installation and Configuration Guide.

Download the software from the MicroStrategy download site.

If you encounter problems during the installation procedure, see the *Troubleshooting* appendix in the Installation and Configuration Help. If you require additional assistance, contact Technical Support.

Directory Structure

The following table provides the default folder structure that appears after you install MicroStrategy Narrowcast Server with no previous version of MicroStrategy Narrowcast Server installed.

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The default folder is:

`C:\Program Files (x86)\MicroStrategy\Product Name` when installed on a 64-bit Windows environment.

If installing over a previous version of the product, the folder remains the same.

Folder	Contents
`\MicroStrategy\Narrowcast Server`	MicroStrategy Narrowcast Server program files, SQL scripts, sample code, tutorial-related files, objects to be imported during configuration
`\Common Files\MicroStrategy`	Shared MicroStrategy program files; product documentation, Readme files and Release Notes; shared tools and utilities

Upgrading Narrowcast Server

To benefit from the latest functionality available in this version of MicroStrategy Narrowcast Server, the administrator must upgrade the MicroStrategy system. Additionally, pre-11 versions of MicroStrategy Narrowcast Server are not interoperable with MicroStrategy 11 software. It is recommended to upgrade pre-11 versions of Narrowcast Server to ensure proper functionality.

- MicroStrategy products 10.4.x and 2019 and above can be upgraded directly to Strategy One, MicroStrategy ONE, or MicroStrategy 2021.

For information about upgrading Narrowcast Server, see the Narrowcast Server Upgrade Guide. This manual guides you through the process of upgrading and covers the following:

- How the upgrade process works
- What prerequisites must be met before upgrading

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- What features will be upgraded
- What features will not be upgraded
- What post-upgrade steps must be performed to ensure that features are upgraded properly

You can find information on the NCS SDK, samples, and information about compiling in the MicroStrategy Developer Library. You can access the MicroStrategy Developer Library from the following locations:

- In Windows, the default location is:
  - C:\Program Files (x86)\MicroStrategy\SDK\docs\DeveloperLibrary.htm when installed on 64-bit Windows environments.
- In UNIX, the default location is /opt/MicroStrategy/SDK/Docs/DeveloperLibrary.htm or $HOME/MicroStrategy/install/SDK/docs/DeveloperLibrary.htm if you do not have write access to /opt/MicroStrategy.

Uninstalling MicroStrategy Narrowcast Server

Before you uninstall the product, note the following:

- You should make backups of files that have the extension "properties" located in the Subscription Portal, Subscription Engine, and Common Files folders and subfolders. These files are modified when you configure your system, so when the uninstallation program deletes them you lose the modifications.
- If you have configured services using the Subscription Portal Administration Wizard to support dynamic subscription or page-by personalization, you should also make backups of files that begin with "DYN" and have the extension "xml" located in the same folders. To locate and back up these files, you can use Windows Explorer or MS-DOS commands in the Command Prompt window. Your drive letter and folder structure may vary.

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- You must uninstall all Narrowcast Server components (Delivery Engine, Subscription Engine, Subscription Portal) before you attempt to uninstall Narrowcast Administrator.
- If you uninstall and reinstall the product, your system is not restored to its original state. You must reconfigure the server configuration of using the System Configuration Wizard in Narrowcast Administrator. Additionally, you must restore the Subscription Portal configuration either by choosing a different Subscription Engine machine using the System Configuration Wizard, or by restoring the files that you backed up before you performed the uninstallation procedure.

For information about uninstalling MicroStrategy Narrowcast Server, see the Narrowcast Server Installation and Configuration Guide.

Resolved Issues

For a list of all the resolved issues in this Strategy release, see *Resolved Defects and Enhancements*.

Troubleshooting

The information below provides troubleshooting information for known issues with MicroStrategy Narrowcast Server. For comprehensive troubleshooting information related to Narrowcast Server, see the troubleshooting section in the Narrowcast Server System Administrator Guide.

The troubleshooting techniques and procedures listed below for MicroStrategy Narrowcast Server are broken up into the following sections:

Troubleshooting Known Issues

Issues that have a prefix of S (that is, S#####) are customer cases that can be tracked through MicroStrategy Technical Support. Those that are prefixed with T (T#####) are MicroStrategy internal issues. Internal issue numbers do not correlate to customer case numbers.

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- **T209900** - The File ITM allows write access to anywhere on the Narrowcast Server local drive when the File devices use only the macro "`%%PhysicalAddress%%`".

  Workaround: To control where users can create File locations, configure your File ITM devices to use relative paths (for example, `\\server\share\%%PhysicalAddress%%`) instead of using only "`%%PhysicalAddress%%`". To further restrict the write access you can disable "Create required folders" and "Overwrite files with same name". Additionally, you can enable "Append timestamp to file name".

- **T281348** - When trying to import an Excel 2007 `.xlsx` file as a template the error message "Failed to read the Excel file" is returned.

  Workaround: Save the Excel 2007 .xlsx file in "Excel 97-2003 workbook" format. You can then import the file as a template successfully.

General Troubleshooting

- **Symptom**: When using the Subscription Book synchronization tool, some CSV files are rejected as corrupted, even though they are valid
  - **Cause**: The synchronization tool cannot process CSV files in which the number of fields in each row does not match the number of fields in the header row. (145685)
  - **Resolution**: When generating CSV files, ensure that every row has the same number of fields. You can configure Excel to do this by adding an extra "dummy" column to the end of each row, and populating that column with values in each row.
- **Symptom**: When you try to edit a subscription information object, an error message with the text "Element not found" is encountered.
  - **Cause**: If an information source definition is modified so that various pieces of information are no longer retrieved from the Subscription Book, editing a subscription information object that relies on this

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information produces this error message. (147990)

- **Resolution**: Modify the information source definition temporarily to allow retrieving information from the Subscription Book. Modify the affected subscription information object definition so that it no longer retrieves information from the Subscription Book. Then revert the information source definition back to its previous state, removing the ability to retrieve information from the Subscription Book.

Using the MicroStrategy Narrowcast Server SMTP Transmitter through a Network Firewall

In some cases, corporate networks make use of firewalls to protect the internal LAN resources from external unauthorized access. MicroStrategy Narrowcast Server is unable to transmit SMTP messages if the server Internet access is restricted by a firewall. In this case, all the SMTP messages need to be sent through an SMTP e-mail server with relay capabilities configured as a smart host. Configure the device(s) to deliver through a smart host:

1. In the Device Editor, click the **Delivery Options** tab.
2. Specify the IP address of the SMTP server. The SMTP server should have access to the Internet and it should be configured to relay messages originated in the MicroStrategy Narrowcast Server machine.
3. Specify the port number where the SMTP server receives incoming e-mail.
4. Select the **Use Smart Host Always** check box.
5. Do the same for all the devices used by subscribers.

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Strategy SDK

Introduction

The Strategy SDK is a collection of programming tools, libraries, utilities, and documentation that are designed to allow users to customize and extend Strategy products, embed them within other applications, and to integrate with other applications. The programming tools provided by the Strategy SDK— including programming instructions, points of access, and guidelines for developers— allow programmers to enhance the operation of their software by customizing and embedding the robust functionality of the Strategy BI platform.

The Strategy SDK and MicroStrategy Developer Library (MSDL) are not included in the Strategy installation. You can access the MicroStrategy Developer Library from the SDK area of MicroStrategy Community. Download the Strategy SDK from the Previous Releases page.

The Strategy SDK provides access to the entire Strategy platform and includes all of the services and utilities required for building a robust, feature-filled business intelligence-enabled application. The Strategy SDK is made up of the following components:

- Strategy SDK includes a comprehensive set of SDKs and APIs, which are described in detail in the MicroStrategy Developer Library:
  - Data Connector SDK
  - Embedding SDK
  - Identity SDK
  - Library SDK
  - Library Mobile SDK

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- Mobile SDK
- REST API
- Visualization SDK
- Web SDK

- Each of the individual SDKs listed above is made up of some or all of the following specific components:
  - A comprehensive set of APIs that includes:
    - REST APIs
    - Native iOS APIs
    - Java APIs
    - JavaScript APIs

    The Strategy APIs provide support for a variety of development environments, including Java, C++, VB, XML, JavaScript, and standard Web and client-server technologies.
  - A complete set of SDK documentation for all the Strategy products that includes:
    - Reference guides, such as Javadocs for the APIs.
    - The SDK area of Strategy Community, which provides all the information required to understand and use the Strategy SDK.
  - A variety of development tools that include:
    - Source code and sample application code for typical customization tasks.
    - Development tools and production-ready utilities that reduce code creation and maintenance and help you build customized applications.

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Compatibility and Interoperability

The Strategy SDK should only be connected to a Strategy Intelligence Server of the same version or later for production purposes.

Installing Strategy SDK

The Strategy SDK and MicroStrategy Developer Library (MSDL) are not included in the Strategy installation. To view the documentation for the current release, visit the SDK area of Strategy Community To download the SDK for any supported release or view documentation for previous releases, refer to the Previous Releases page.

Upgrading Strategy SDK

To benefit from the latest functionality available in this version of the Strategy SDK, an administrator must upgrade the system.

Before upgrading, see the Upgrade Help for important information about preparing for the upgrade, the order in which to upgrade products, and tasks to perform after upgrading.

To upgrade customizations that were created using the Strategy SDK, see the SDK area of Strategy Community. Each separate SDK has upgrade instructions that are specific for maintaining customizations made using that SDK during an upgrade.

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