



TOC

Logi Symphony 24	14
Symphony 24 Release Notes Overview	15
Individual Release Pages	15
Symphony Version 24 Summary of Changes	16
Upgrade Considerations	16
Enhancements	16
v24.4 Enhancements	17
v24.3 Enhancements	18
v24.2 Enhancements	18
v24.1 Enhancements	19
Removed Features From Symphony v23	20
Symphony 24.4	20
Visual Data Discovery Module	21
Managed Dashboards and Managed Reports Modules	21
Symphony 24.3	21
Visual Data Discovery Module	22



Managed Dashboards and Managed Reports Modules	22
Symphony 24.2	22
Visual Data Discovery Module	22
Managed Dashboards and Managed Reports Modules	22
Symphony 24.1	22
Visual Data Discovery Module	23
Managed Dashboards and Managed Reports Modules	23
API Updates in Symphony v24	23
Symphony 24.4	23
Visual Data Discovery Module	23
Managed Dashboards and Managed Reports Modules	24
Symphony 24.3	24
Visual Data Discovery Module	24
Managed Dashboards and Managed Reports Modules	24
Symphony 24.2	25
Visual Data Discovery Module	25
Managed Dashboards and Managed Reports Modules	25
Symphony 24.1	25



Visual Data Discovery Module	25
Managed Dashboards and Managed Reports Modules	30
Symphony 24.4 Release Notes	31
Beta Features in This Release	31
Feature Enhancements	32
API Updates	34
Visual Data Discovery Module	34
Managed Dashboards and Managed Reports Modules	35
Resolved Issues	35
Symphony	35
Visual Data Discovery Module	36
Managed Dashboards and Managed Reports Modules	36
Deprecated Features	37
Symphony	37
Visual Data Discovery Module	37
Managed Dashboards and Managed Reports Modules	38
Removed Features	38
Symphony	38



Visual Data Discovery Module	39
Managed Dashboards and Managed Reports Modules	39
Changes in this Version	39
Managed Dashboards and Reports	39
Known Issues	40
Symphony 24.4 Enhancements	41
Self Service Reports	41
The Library Work Area	42
Windows Support	44
Improved Hierarchical Filter Management	44
Updated Data Connector Support	44
Expanded Accessibility	44
Playground Updates	45
Table Visual Updates	45
Export Dates in ISO 8601 Format	45
Data Preparation and Analysis	45
Design and View	45
API / Branding / Integration	45



Scheduled Reports Frequency	46
Symphony 24.3 Release Notes	47
Beta Features in This Release	47
Feature Enhancements	48
API Updates	49
Visual Data Discovery Module	50
Managed Dashboards and Managed Reports Modules	50
Resolved Issues	50
Symphony	50
Visual Data Discovery Module	50
Managed Dashboards and Managed Reports Modules	51
Deprecated Features	51
Symphony	51
Visual Data Discovery Module	52
Managed Dashboards and Managed Reports Modules	52
Removed Features	52
Symphony	52
Visual Data Discovery Module	52



Managed Dashboards and Managed Reports Modules	52
Changes in this Version	53
Managed Dashboards and Reports	53
Known Issues	53
Symphony 24.3 Enhancements	54
Expanded Dashboard Sharing	55
Flowise AI	55
Doc Assist	55
.NET 8 Support	55
Migrate Dundas to Symphony	55
Redis Caching	55
Table of Contents Navigation	55
Regional Setting - Australia	56
PostgreSQL Support	56
IBM Db2 Support	56
Clear Filters	56
PDF Navigation	56
Data Visualizations	56



Symphony 24.2 Release Notes	57
Beta Features in This Release	57
Feature Enhancements	58
API Updates	62
Visual Data Discovery Module	62
Managed Dashboards and Managed Reports Modules	62
Resolved Issues	63
Symphony	63
Visual Data Discovery Module	63
Managed Dashboards and Managed Reports Modules	63
Deprecated Features	64
Symphony	64
Visual Data Discovery Module	64
Managed Dashboards and Managed Reports Modules	64
Removed Features	64
Symphony	64
Visual Data Discovery Module	65
Managed Dashboards and Managed Reports Modules	65



Changes in this Version	65
Managed Dashboards and Reports	65
Known Issues	66
Symphony 24.2 Enhancements	67
Source Creation Enhancements	68
SAP S/4HANA Support	68
Upgrade to Symphony	68
UI and UX Improvements	68
Tenant Management Improvements	69
Managed Dashboard Data Connections	69
Table of Contents Navigation	69
Export Numeric Fields and Dates	70
RSA Key Signing Support	70
Select Individual Modules	70
Breaking Changes Management	70
Import Matching Strategy Improvements	70
Improved Line Chart Performance	70
Change Schemas in Manual Select Transforms	71



Map and Tree Visualization Updates	71
Upgraded Python Requirements	71
Symphony 24.1 Release Notes	72
Beta Features in This Release	72
Feature Enhancements	74
API Updates	77
Visual Data Discovery Module	78
Managed Dashboards and Managed Reports Modules	83
Resolved Issues	83
Symphony	83
Visual Data Discovery Module	83
Managed Dashboards and Managed Reports Modules	84
Deprecated Features	84
Symphony	84
Visual Data Discovery Module	85
Managed Dashboards and Managed Reports Modules	85
Removed Features	85
Symphony	85



Visual Data Discovery Module	85
Managed Dashboards and Managed Reports Modules	85
Changes in this Version	86
Managed Dashboards and Reports	86
Known Issues	87
Symphony 24.1 Enhancements	88
Logi AI	88
Managed Dashboard Data Connections	90
Logi Symphony Software As A Service	90
Logi Symphony For Visual Data Discovery	90
Groups Management	90
Enhanced Filter Security Capabilities	91
Content Migration Flow Improvements and Breaking Changes Management Expansion	93
Lite Dashboard for Self-Service Environments	95
Suppress Time Zone Labels	96
Self Service Reporting Improvements	96
Multi-Tenancy Improvements	97
Embed Data Discovery Components in Managed Dashboards	101



Data Cube Discovery Enhancements	102
Symphony Release Vehicles and Third Party End of Life Policy	104
Important Notice	104
Current Releases	104
Third Party End of Life Policy	105
CLI Support Table	106
Deprecated Features	107
Symphony v24.4	107
Symphony	107
Visual Data Discovery Module	107
Managed Dashboards and Managed Reports Modules	107
Symphony v24.3	108
Symphony	108
Visual Data Discovery Module	108
Managed Dashboards and Managed Reports Modules	108
Symphony v24.2	108
Symphony	108
Visual Data Discovery Module	109



Managed Dashboards and Managed Reports Modules	109
Symphony v24.1	109
Symphony	109
Visual Data Discovery Module	109
Managed Dashboards and Managed Reports Modules	109
Removed Features	110
Symphony v24.4	110
Symphony	110
Visual Data Discovery Module	110
Managed Dashboards and Managed Reports Modules	110
Symphony v24.3	111
Symphony	111
Visual Data Discovery Module	111
Managed Dashboards and Managed Reports Modules	111
Symphony v24.2	111
Symphony	111
Visual Data Discovery Module	112
Managed Dashboards and Managed Reports Modules	112



Symphony v24.1	112
Symphony	112
Visual Data Discovery Module	112
Managed Dashboards and Managed Reports Modules	112



- Archive of documentation for Logi Symphony v24

Logi Symphony 24



- Archive of documentation for Logi Symphony v24

Symphony 24 Release Notes Overview

The following links described the feature enhancements, resolved issues, and removed features for Symphony releases.

To purchase this product, contact [insightsoftware Sales](#).

Individual Release Pages

- [Symphony 24.4 Release Notes](#)
- [Symphony 24.4 Enhancements](#)
- [Symphony 24.3 Release Notes](#)
- [Symphony 24.3 Enhancements](#)
- [Symphony 24.2 Release Notes](#)
- [Symphony 24.2 Enhancements](#)
- [Symphony 24.1 Release Notes](#)
- [Symphony 24.1 Enhancements](#)
- [Symphony Version 24 Summary of Changes](#)
- [Symphony Release Vehicles and Third Party End of Life Policy](#)
- [Deprecated Features](#)
- [Removed Features](#)



Symphony Version 24 Summary of Changes

This is a summary of the major changes made in version 24 of Symphony. It is provided so you can quickly identify new and changed features before upgrading from Symphony 23 to Symphony 24.

Symphony is offered on a quarterly release schedule, and our version numbering system reflects this. The current major release of Symphony is v24.4.

Upgrade Considerations

Be sure to back up your metadata store (see [Back Up The Metadata Store](#)) before you upgrade.

To ensure services start properly after upgrade in a Linux environment:

1. Verify all of your JVM setting overrides are defined in the `/etc/zoomdata` directory (not `/opt/zoomdata/conf`).
2. The `.jvm` files in `/etc/zoomdata/` only contain parameters that are different from default ones, typically Xms/Xmx settings, javaagent settings.
If you have copied the entire `.jvm` file from `/opt/zoomdata/conf` for placement into `/etc/zoomdata`, that configuration is not overwritten after upgrade. Properties such as `XX:+UseConcMarkSweepGC` can prevent services from starting on Java 17 runtime.

For more information on configuration setups and overrides, see [Configure Memory Settings](#) and [Connector Properties And Property Files](#).



Note: If you are upgrading from an earlier version of Symphony, this may be a breaking change: the introduction of the system attribute `User.timeZone` may cause a conflict if you used this as a custom attribute. See [Upgrade Workflow](#).

Enhancements

The following sections provide you with a summary of enhancements in the previous releases, all of which are present in the latest release of Symphony.

- [v24.4 Enhancements](#)
- [v24.3 Enhancements](#)
- [v24.2 Enhancements](#)
- [v24.1 Enhancements](#)



- [Removed Features From Symphony v23](#)

- [API Updates in Symphony v24](#)

v24.4 Enhancements

- [Self Service Reports](#)

- [Windows Support](#)

- [Improved Hierarchical Filter Management](#)

- [Updated Data Connector Support](#)

- [Expanded Accessibility](#)

- [Playground Updates](#)

- [Table Visual Updates](#)

- [Export Dates in ISO 8601 Format](#)

- [Data Preparation and Analysis](#)

- [Design and View](#)

- [API / Branding / Integration](#)

- [Scheduled Reports Frequency](#)



v24.3 Enhancements

- [Expanded Dashboard Sharing](#)
- [Flowise AI](#)
- [Doc Assist](#)
- [.NET 8 Support](#)
- [Migrate Dundas to Symphony](#)
- [Redis Caching](#)
- [Table of Contents Navigation](#)
- [Regional Setting - Australia](#)
- [PostgreSQL Support](#)
- [IBM Db2 Support](#)
- [Clear Filters](#)
- [PDF Navigation](#)
- [Data Visualizations](#)

v24.2 Enhancements

The following enhancements were made to Symphony v24.2. Select the links for more information.

- [Source Creation Enhancements](#)
- [SAP S/4HANA Support](#)



- Archive of documentation for Logi Symphony v24

- [Upgrade to Symphony](#)
- [UI and UX Improvements](#)
- [Tenant Management Improvements](#)
- [Managed Dashboard Data Connections](#)
- [Table of Contents Navigation](#)
- [Export Numeric Fields and Dates](#)
- [RSA Key Signing Support](#)
- [Select Individual Modules](#)
- [Breaking Changes Management](#)
- [Import Matching Strategy Improvements](#)
- [Improved Line Chart Performance](#)
- [Change Schemas in Manual Select Transforms](#)
- [Map and Tree Visualization Updates](#)
- [Upgraded Python Requirements](#)

v24.1 Enhancements

The following enhancements were made to Symphony v24.1. Select the links for more information.

- [Logi AI](#)
- [Managed Dashboard Data Connections](#)



- [Logi Symphony Software As A Service](#)
- [Logi Symphony For Visual Data Discovery](#)
- [Groups Management](#)
- [Enhanced Filter Security Capabilities](#)
- [Content Migration Flow Improvements and Breaking Changes Management Expansion](#)
- [Lite Dashboard for Self-Service Environments](#)
- [Suppress Time Zone Labels](#)
- [Self Service Reporting Improvements](#)
- [Multi-Tenancy Improvements](#)
- [Embed Data Discovery Components in Managed Dashboards](#)
- [Data Cube Discovery Enhancements](#)

Removed Features From Symphony v23

The following features were removed from Symphony v23 to make way for improvements in Symphony v24.

Symphony 24.4

Title	Description
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Removed Features	
None.	
24.4.2 Removed Features	
None.	
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
24.4.1002 Removed Features	
None.	
24.4.1001 Removed Features	
None.	
24.4 Removed Features	
POST /File/Copy and POST /Project/Duplicate	The return values of the following REST and JavaScript API methods have changed: POST /File/Copy/ returns a CopyResultData and copyEntry a CopyResult , and POST /Project/Duplicate/ returns a DuplicateProjectResultData and duplicateProject a DuplicateProjectResult .

Symphony 24.3

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Symphony 24.2

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Symphony 24.1

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

API Updates in Symphony v24

This table provides a breakdown of all reported updates in Symphony v24.

Symphony 24.4

Visual Data Discovery Module

Endpoint	Method	Description
24.4.3 API Updates		
None.		
24.4.2 API Updates		
None.		
24.4.1 API Updates		
None.		
24.4 API Updates		
/api/sources/{source_id}/cache?cacheType=ENTITY_DATA	DELETE	This endpoint has been expanded to allow you to clear the ENTITY_DATA cache in addition to the DATA and STATISTICS cache.



Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
24.4.1002 API Updates		
None.		
24.4.1001 API Updates		
None.		
24.4 API Updates		
Logon Endpoints		When logging on using .NET or REST with administrator credentials and setting <code>EffectiveAccountName/EffectiveCredentials</code> , optionally also apply <code>CustomAttributes</code> or set <code>AccountProperties</code> to create or update an account.
/DataCube/StorageInfo	GET	Access data cube storage run time details by calling GET /DataCube/StorageInfo/ to get StorageInfoData or getStorageInfo in JavaScript to get StorageInfo .

Symphony 24.3

Visual Data Discovery Module

Endpoint	Method	Description
None.		

Managed Dashboards and Managed Reports Modules

Endpoint	Description
ModifyGroupMembershipForAccount ModifyGroupMembershipForGroup	.NET API methods ModifyGroupMembershipForAccount and ModifyGroupMembershipForGroup now return a value.
REST API	The OpenAPI file describing the REST API is not included in this version due to changes in third party tools, but it will be re-added in future versions.

Symphony 24.2

Visual Data Discovery Module

Endpoint	Method	Description
/api/group-membership/{id}	PATCH	Manage group membership for users by updating a group: define <code>usersToAdd</code> and <code>usersToRemove</code> to include a single user or an array of users.
/api/inventory/{type}/ and /api/inventory/{type}/{id}	GET	If you created dashboards and visuals that include your own <code>originID</code> , calling this endpoint returns each item and their associated <code>originID</code> , if applicable.
/api/sources	GET/PUT	Use to return and define information for a source.
/api/sources/{sourceId}/clone	POST	Use to create a copy of a source.
/api/groups	POST, PUT	You can now assign an identifier to your groups using <code>externalId</code> that is unique across tenants. This does not change or replace the <code>accountId</code> assigned by Symphony. The <code>externalId</code> is not available in the UI.

Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
None.		

Symphony 24.1

Visual Data Discovery Module

Endpoint	Method	Description
24.1 API Updates		
/api/sources/export	GET	These attributes are returned for sources in your environment. Include these attributes to work with import matching strategies. <code>connections[].originId</code> - Returns the value of the connection ID from the imported connection.

Endpoint	Method	Description
		■ <code>sources[].originId</code> - Returns the value of the source ID from the imported source
/api/sources/import	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. Send as an array; each strategy is considered in order. ■ <code>importSettings.objectClassLevel.connections.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for connections. This array can include: ◦ BY_ORIGIN_ID ◦ BY_ID_AND_TYPE_AND_PARAMS ◦ BY_TYPE_AND_PARAMETERS ◦ BY_NAME_AND_TYPE ◦ BY_TYPE_AND_PARAM_KEYS ◦ BY_NAME If an order is not specified, the default strategy of BY_ID_AND_TYPE_AND_PARAMS or BY_TYPE_AND_PARAMETERS is used. ■ <code>importSettings.objectClassLevel.sources.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for sources. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used.

Endpoint	Method	Description
		▪ <code>importSettings.warningTags[]</code> - Send an array of warning tags to apply to objects imported with warnings. Send <code>enableDefaultRead</code> to enable data read permissions for the sources imported for all users in the tenant.
/api/dashboards/export/	GET	These attributes are returned for dashboards in your environment. Include these attributes for importing. ▪ <code>connections[].originId</code> - Returns the value of the associated connection ID. ▪ <code>sources[].originId</code> - Returns the value of the associated source ID. ▪ <code>visuals[].originId</code> - Returns the value of the associated visual ID. ▪ <code>dashboards[].originId</code> - Returns the value of the associated dashboard ID.
/api/dashboards/import/	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. Send as an array; each strategy is considered in order. ▪ <code>importSettings.objectClassLevel.connections.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for connections. This array can include: ◦ <code>BY_ORIGIN_ID</code> ◦ <code>BY_ID_AND_TYPE_AND_PARAMS</code> ◦ <code>BY_TYPE_AND_PARAMETERS</code>

Endpoint	Method	Description
		◦ BY_NAME_AND_TYPE ◦ BY_TYPE_AND_PARAM_KEYS ◦ BY_NAME If an order is not specified, the default strategy of BY_ID_AND_TYPE_AND_PARAMS or BY_TYPE_AND_PARAMETERS is used. ■ <code>importSettings.objectClassLevel.visuals.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for visuals. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ■ <code>importSettings.objectClassLevel.sources.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for sources. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ■ <code>importSettings.objectClassLevel.dashboards.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for dashboards. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ■ <code>importSettings.warningTags[]</code> - Send an array of warning tags to apply to objects imported with warnings.

Endpoint	Method	Description
		Send <code>enableDefaultRead</code> to enable data read permissions for the sources imported for all users in the tenant.
/api/visuals/export/	GET	These attributes are returned for visuals in your environment. Include these attributes for importing. - connections[].originId - Returns the value of the associated connection ID. - sources[].originId - Returns the value of the associated source ID. - visuals[].originId - Returns the value of the associated visual ID.
/api/visuals/import/	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. Send as an array; each strategy is considered in order. - importSettings.objectClassLevel.connections.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for connections. This array can include: - BY_ORIGIN_ID - BY_ID_AND_TYPE_AND_PARAMS - BY_TYPE_AND_PARAMETERS - BY_NAME_AND_TYPE - BY_TYPE_AND_PARAM_KEYS - BY_NAME

Endpoint	Method	Description
		If an order is not specified, the default strategy of <code>BY_ID_AND_TYPE_AND_PARAMS</code> or <code>BY_TYPE_AND_PARAMETERS</code> is used. ▪ <code>importSettings.objectClassLevel.visuals.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for visuals. This array can include: ◦ <code>BY_ORIGIN_ID</code> ◦ <code>BY_NAME</code> If an order is not specified, the default strategy of <code>BY_NAME</code> is used. ▪ <code>importSettings.objectClassLevel.sources.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for sources. This array can include: ◦ <code>BY_ORIGIN_ID</code> ◦ <code>BY_NAME</code> If an order is not specified, the default strategy of <code>BY_NAME</code> is used. ▪ <code>importSettings.warningTags[]</code> - Send an array of warning tags to apply to objects imported with warnings. Send <code>enableDefaultRead</code> to enable data read permissions for the sources imported for all users in the tenant.
<code>/api/accounts/name/{name}</code>	GET	This takes the <code>{name}</code> of the tenant account as a path parameter and returns tenant account details. Works similarly to <code>/api/accounts/{id}/</code> .

Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
None.		



Symphony 24.4 Release Notes

This topic describes feature enhancements, resolved issues, and important information for Symphony 24.4.

To purchase this product, contact [insightsoftware Sales](#).

- [Beta Features in this Release](#)
- [Feature Enhancements](#)
- [API Updates](#)
- [Resolved Issues](#)
- [Deprecated Features](#)
- [Removed Features](#)
- [Changes in this Version](#)
- [Known Issues](#)

See also [Deprecated FeaturesSymphony 24 Release Notes Overview](#), [Deprecated Features](#), and [Symphony Release Vehicles and Third Party End of Life Policy](#).

Beta Features in This Release

This release of Symphony may contain some features and enhancements in a beta test state so you can try them out in a non-production environment. Assess how they work in your environment, or provide feedback to insightsoftware as part of a formal beta testing process.



Important: Do not use beta features in a production environment or on mission-critical systems.

Name	Beta Version	Description	Final Release Version
Logi AI	24.1	Logi Symphony introduces Logi AI, a comprehensive AI and Natural Language Generation (NLG) module designed to transform the way you analyze your data.	N/A

Name	Beta Version	Description	Final Release Version
		Logi AI is a flexible AI platform that enables you to build and embed your own AI-powered chatbots directly into dashboards and visualizations in partnership with Flowise. Embedded chatbots help you elevate the user experience, making complex data analytics intuitive and effective for informed data-driven decisions. Adjust chatflows based on your use cases, domain policies, and security policies to ensure actionable insights are easily accessible and perfectly aligned with your strategic goals. Backup your chatflows manually. Four starter templates are available from insightsoftware in the Flowise market place. For more information, see Logi AI and Logi AI Solutions.  Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.	

Feature Enhancements

Title	Description
24.4.1 Feature Enhancements	
None.	
24.4 Feature Enhancements	
Self Service Reports	Generate and manage reports using Symphony's new self-service reporting capability inside the Visual Data Discovery module. Create customized reports using a table visual, adding a report header and footer as needed. Additionally, you can apply filtering, conditional formatting, and grouping to your data. Apply aggregate functions on different fields to produce the report you need. Export easily as a PDF, including all of your customizations. For more information, see Self Service Reports, Manage Self Service Reports and Create Self Service Reports.
Windows Support	You can now install an instance of Symphony in your Windows environment. Supported versions include Windows 10, Windows 11, Windows Server 2016, 2019, and 2022. See Install Symphony - Windows.

Title	Description
Improved Hierarchical Filter Management	We've improved your experience and expanded the capabilities of hierarchical filters, making data sets of all sizes more easily navigable. ■ Use the expand and collapse icons to more readily find parent and child nodes. ■ Select and deselect items and nodes easily. ■ The new Expand All option allows you to expand and collapse the entire data set quickly to make or review changes.
Updated Data Connector Support	Several new data connectors are available or have been updated to allow your users to connect to a wider range of sources. ■ Amazon Simple Storage Service Connector (S3) now supports the S3A protocol. ■ You can now add the IBM DB2 Connector in your Visual Data Discovery module. ■ We have added support for the Business Central Connector.
Expanded Accessibility	We have updated our accessibility support for content viewed in full screen mode or embedded in your own application. These updates include features such as keyboard support, accessible names for more non-text content, and use of <code>aria-label</code>. For more information, see Accessibility.
Playground Updates	Symphony Developer Playground is a hosted, embedded Playground environment that allows you to explore a space dedicated to our low-code, rapid development tools crafted for software teams. Dive into white-labeling options, grab functional code samples, and discover straightforward embedding features. Start effortlessly creating interactive analytics embeddable content that suits your brand and business needs.
Table Visual Updates	Define the columns you want to include in a table visual when you create the visual. After you've selected your source and the table visual type, select to include one or more columns quickly and easily. Select Create Visual to generate your visual. If you select no columns, all columns are included by default. See Tables.
Export Dates in ISO 8601 Format	You now have the option to export and share dates as an ISO 8601 date in XLSX format. This preserves any formatting you've applied to your data while allowing Excel users to recognize and manipulate the exported dates as dates in Excel. See Export Raw Data in CSV or XLSX Format and Schedule a Dashboard Report.

Title	Description
Data Preparation and Analysis	In Managed Dashboards and Reports, add placeholders to SQL Select expressions that can be set via parameters. You can now use Array type columns from PostgreSQL or Vertica in an SQL Select configuration for filtering purposes.
Design and View	You can now create content in Managed Dashboards and Reports that meets accessibility standards more easily by adding and associated accessible names and taking advantage of various improvements to built-in filters and components. Password-protect your exported PDFs from Managed Dashboards and Reports, and optionally require this password protection when exporting.
API / Branding / Integration	When logging on using .NET or REST with administrator credentials and setting <code>EffectiveAccountName/EffectiveCredentials</code>, optionally also apply <code>CustomAttributes</code> or set <code>AccountProperties</code> to create or update an account. Access data cube storage run time details by calling GET /DataCube/StorageInfo/ to get StorageInfoData or getStorageInfo in JavaScript to get StorageInfo.
Scheduled Reports Frequency	A new frequency option for sending scheduled dashboard reports in Visual Data Discovery, Days, allows you to schedule a report for generation and sharing on more than one day a week with a few simple selections. Create a new schedule or edit an existing schedule to meet your needs. See Schedule a Dashboard Report.

API Updates

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Visual Data Discovery Module

Endpoint	Method	Description
24.4.3 API Updates		
None.		
24.4.2 API Updates		
None.		
24.4.1 API Updates		
None.		



Endpoint	Method	Description
24.4 API Updates		
/api/sources/{source_id}/cache?cacheType=ENTITY_DATA	DELETE	This endpoint has been expanded to allow you to clear the ENTITY_DATA cache in addition to the DATA and STATISTICS cache.

Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
24.4.1002 API Updates		
None.		
24.4.1001 API Updates		
None.		
24.4 API Updates		
Logon Endpoints		When logging on using .NET or REST with administrator credentials and setting EffectiveAccountName/EffectiveCredentials, optionally also apply CustomAttributes or set AccountProperties to create or update an account.
/DataCube/StorageInfo	GET	Access data cube storage run time details by calling GET /DataCube/StorageInfo/ to get StorageInfoData or getStorageInfo in JavaScript to get StorageInfo .

Resolved Issues

Symphony

Title	Description
24.4.1 Resolved Issues	
User Interface	Corrected an issue that prevented a full listing of tenants, groups, and users in environments that include a large number of tenants, groups, and users.
24.4 Resolved Issues	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Resolved Issues	
Time Ranges	Corrected an issue that caused the time bars to display and render an incorrect start year for bar charts that used year ranges and granularity set to week..
Time Bar	Corrected an issue in the time bar that used and displayed UTC time in place of the configured time zone.
Fields Visibility	Corrected an issue that caused hidden fields to display in the user interface when users create tables from a source that includes hidden fields.
24.4.2 Resolved Issues	
Embedded Dashboards	Corrected an issue that prevented selected dashboards from displaying properly in embedded environments.
Dashboard Error Messages	Corrected an issue that caused an error message to be returned when loading some dashboards that contained no errors.
24.4.1 Resolved Issues	
None.	
24.4 Resolved Issues	
Content Security	Added the value <code>http.response.header.content-security-policy</code> to <code>zoomdata.properties</code> . Use to add appropriate content security values to support your implementation. See zoomdata.properties Properties .
Line Trend: Attributes Visual Update	When you create a line trend visual that includes the option to include blank data, data with no value is displayed along with data that includes values.

Managed Dashboards and Managed Reports Modules

Description
24.4.1002 Resolved Issues
Fixed an error referring to key 'ColumnTypeName' that may occur when connecting to certain data sources such as SAP SQL Anywhere using the JDBC data provider.
Fixed an issue that could prevent a data cube's warehouse storage from building successfully for a data connector using an on-premise gateway for some deployments.
Fixed an issue that was preventing some dynamic hierarchies from being included when exporting to Excel in certain cases.
Fixed an issue preventing custom Header Text set up for a table from being displayed when exporting to Excel if using a predefined hierarchy with a single level.
Fixed an issue introduced in recent versions that could cause the scheduler service to fail for certain deployments with a configuration error reported.



Description	
24.4.1001 Resolved Issues	
Fixed an error that can occur when using a JDBC data connector with numeric data types containing more than six fractional digits.	
24.4 Resolved Issues	
Errors occurring when importing tenant items without multi-tenancy enabled now provide more information.	
Fixed an error that could occur in a Python transform when initializing a returned DataFrame with certain value types.	
The setting Disable Formula For Expanded Members no longer prevents custom total calculation rules from being applied.	
Fixed an issue that could cause popups opened from within a popup dashboard to appear behind it.	
Fixed an unexpected page break that could be inserted into a report when set on an empty template area.	
Fixed issues that could occur when using data connector overrides for a tenant with a different authentication method than the original data connector.	
Fixed an issue that could cause unused tables to be left behind in the warehouse database after a data cube storage job failure.	
Fixed an issue that could occur for multiple data cube storage jobs starting at the same time causing their status to appear as running indefinitely and errors in the logs reporting "more than one active command".	
Fixed an issue preventing users from being able to click to select some links to the left of transforms in data cubes.	
Fixed an error when loading content that could occur if the current session's application privileges are unexpectedly <code>null</code> .	
Fixed incorrect layout of data in Excel exports for tables that include group headers when parameter values are included to the left.	

Deprecated Features

Symphony

Title	Description
24.4.1 Deprecated Features	
None.	
24.4 Deprecated Features	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Deprecated Features	

Title	Description
None.	
24.4.2 Deprecated Features	
None.	
24.4.1 Deprecated Features	
None.	
24.4 Deprecated Features	
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
24.4.1002 Deprecated Features	
None.	
24.4.1001 Deprecated Features	
None.	
24.4 Deprecated Features	
Decrypt and Encrypt dbi.config	The way the dbi.config file is encrypted and decrypted has changed: the <code>connectionConfig dt</code> command is deprecated and replaced with <code>configFile</code> , which will encrypt only individual connection configuration values rather than the entire section.

Removed Features

Symphony

Title	Description
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Removed Features	
None.	
24.4.2 Removed Features	
None.	
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
24.4.1002 Removed Features	
None.	
24.4.1001 Removed Features	
None.	
24.4 Removed Features	
POST /File/Copy and POST /Project/Duplicate	The return values of the following REST and JavaScript API methods have changed: POST /File/Copy/ returns a CopyResultData and copyEntry a CopyResult , and POST /Project/Duplicate/ returns a DuplicateProjectResultData and duplicateProject a DuplicateProjectResult .

Changes in this Version

Managed Dashboards and Reports

Description
24.4.1001 Changes in this Version
None.

Description
24.4.1002 Changes in this Version
None.
24.4 Changes in this Version
The return values of the following REST and JavaScript API methods have changed: POST /File/Copy/ returns a CopyResultData and copyEntry a CopyResult , and POST /Project/Duplicate/ returns a DuplicateProjectResultData and duplicateProject a DuplicateProjectResult .
The way the dbi.config file is encrypted and decrypted has changed: the <code>connectionConfig dt</code> command is deprecated and replaced with <code>configFile</code> , which will encrypt only individual connection configuration values rather than the entire section.
Choose whether to overwrite existing job schedules in the advanced options when importing related objects such as data cubes.
Improved validation when entering a Session Schema used with a Manual Select.
You can now add placeholders to expressions in select transforms, which are also available to be set via parameters.
New option Abort On Data Errors available when exporting content, which can send failure notification emails if data fails to load for a notification.
User experience improvements were made such as clarifying where to find previously created notifications, exports, and tokens.
Improved performance measurement formatting omits zero measurements and displays the TotalGroupRequestQuery last.
An ARIA Label property is available when editing dashboards and other views to enter an accessible name for content when needed, or to assign an existing label component that provides one.
The accessibility for content in view mode has been improved for built-in filters and components and their provided menus, including keyboard accessibility and appropriate information provided for screen readers.
The new Max Recipients configuration setting can limit the total number of users that can be added as recipients to each email, with a message displayed in dialogs informing senders of the limit.
The new Expiry Date setting on tenants can be used to automatically disable users' access to a tenant on the specified date.
New data connector setting Encode String Values when using the JDBC data provider can prevent errors when certain characters occur in the data.

Known Issues

Affected Releases	Description
Symphony 24.4 and later	The machine learning provider used for the metric set Assistant may not work when installed on Windows with an incompatible version of the Python package NumPy installed. If an error occurs when using the Assistant such as The machine learning engine has not yet started or an entry is logged referring to numpy.dtype size changed, install a 1.x version of NumPy, e.g. with the command prompt or PowerShell command: <code>pip3 install numpy==1.26.4</code>



Symphony 24.4 Enhancements

To purchase this product, contact [insightsoftware Sales](#).

This topic provides details about the enhancements in Composer 24.4.

- [Self Service Reports](#)
- [Windows Support](#)
- [Improved Hierarchical Filter Management](#)
- [Updated Data Connector Support](#)
- [Expanded Accessibility](#)
- [Playground Updates](#)
- [Table Visual Updates](#)
- [Export Dates in ISO 8601 Format](#)
- [Data Preparation and Analysis](#)
- [Design and View](#)
- [API / Branding / Integration](#)
- [Scheduled Reports Frequency](#)

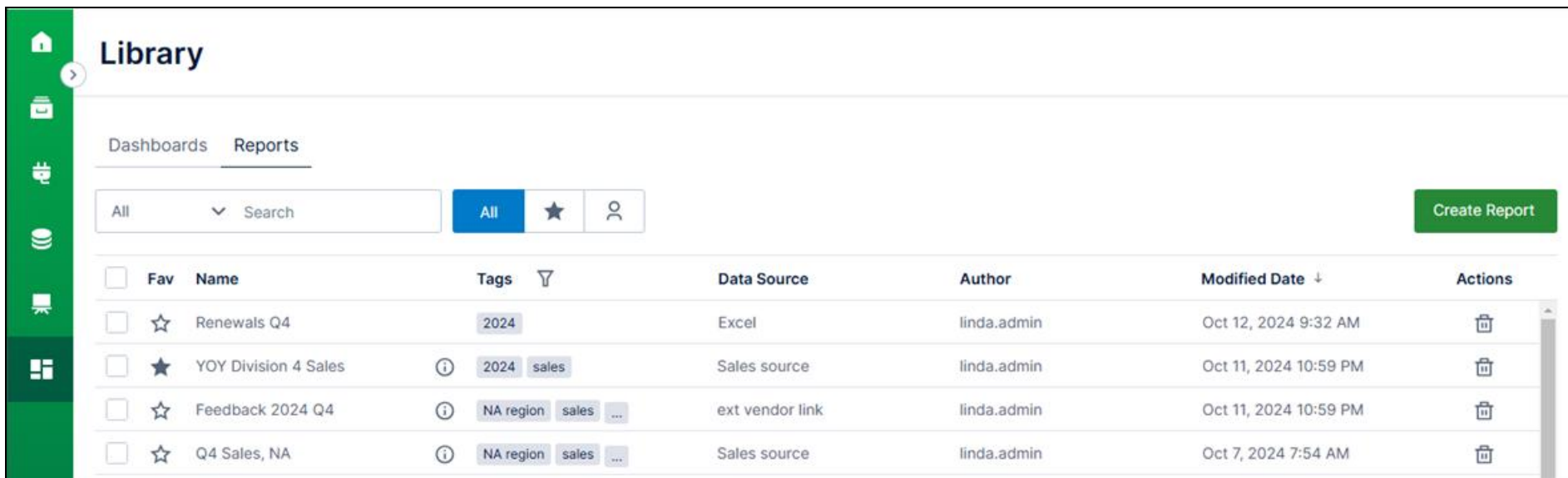
Self Service Reports

Generate and manage reports using Symphony's new self-service reporting capability inside the Visual Data Discovery module. Create customized reports using a table visual, adding a report header and footer as needed.

Additionally, you can apply filtering, conditional formatting, and grouping to your data. Apply aggregate functions on different fields to produce the report you need. Export easily as a PDF, including all of your customizations.

The Library Work Area

The library is now home to both dashboards and self service reports. Select the Library option from the [main menu](#), then the Reports tab in the library, or navigate to your reports directly by selecting the Reports Library option from the main Visual Data Discovery work area.



The screenshot shows the 'Library' interface with the 'Reports' tab selected. A green sidebar on the left contains navigation icons. The main area has a search bar with 'All' and 'Search' options, and a 'Create Report' button. Below is a table of reports:

☐	Fav	Name	Tags	Data Source	Author	Modified Date ↓	Actions
☐	☆	Renewals Q4	2024	Excel	linda.admin	Oct 12, 2024 9:32 AM	
☐	★	YOY Division 4 Sales	2024 sales	Sales source	linda.admin	Oct 11, 2024 10:59 PM	
☐	☆	Feedback 2024 Q4	NA region sales ...	ext vendor link	linda.admin	Oct 11, 2024 10:59 PM	
☐	☆	Q4 Sales, NA	NA region sales ...	Sales source	linda.admin	Oct 7, 2024 7:54 AM	

Use the Reports work area to manage your reports. Sort, search, delete, and create new reports as needed.

Create a self service report

Create a report from any available data source, and apply any [filtering](#), [grouping](#), or [conditional formatting](#) as needed. Add a header and footer to provide information and context as needed. After you create a report, you can favorite it, save a copy of it, and easily export it (up to 15 columns of data) as a PDF.

1. Navigate to the Reports work area in the Visual Data Discovery module.
2. Select **Create Report**. A blank **Untitled report** work area opens.
3. Use the **Select source** option to pick a source to include in this report.
4. Select an available source from the options provided in the **Select a Source** modal. After selection, a **Select Columns** modal opens.

 **Note:** Only sources with data that can be presented in a table are shown.

5. Select one or more columns from your data source to build your report. Scroll through the options or use the Search feature to find specific fields.
6. When you have picked all of the columns you wish to include in the report, then select **Create Report**. Symphony generates your report and displays the report data in a widget in the Untitled report work area.

 **Note:** The maximum number of columns you can include in a report is fifteen.

7. Name and save your report when you're ready, updating the name, adding a description, and assigning tags as needed.

Define a header and footer to your report

 **Note:** By default, the report header and footer are enabled for all reports. Select the Report Header & Footer icon in the reports icon bar to toggle the header and footer sections on and off.

1. Select edit icon in the header or footer area of the report to make changes to it. The selected section expands and opens for editing.
2. Enter the header or footer text you'd like to include, then select the edit icon again to save your changes. The section shrinks and your changes are visible in the report work area.
3. By default, the current date is included in the footer work area, and you can optionally add trademark text, copyright information, or other static information alongside the date.
4. When you are satisfied with your edits, **Save** your changes.

Export your report

1. After you create and save your report, you can access and select the export icon.
2. Select the export icon. A preview window displaying the first few rows of entries in your report opens.
3. If you like the look of your report, select **Export PDF** to download the report. Select **Cancel** to go back and make further changes to your report.

For more information, see [Manage Self Service Reports](#) and [Create Self Service Reports](#).



Windows Support

You can now install an instance of Symphony in your Windows environment. Supported versions include Windows 10, Windows 11, Windows Server 2016, 2019, and 2022.

See [Install Symphony - Windows](#).

Improved Hierarchical Filter Management

We've improved your experience and expanded the capabilities of hierarchical filters, making data sets of all sizes more easily navigable.

- Use the expand and collapse icons to more readily find parent and child nodes.
- Select and deselect items and nodes easily.
- The new **Expand All** option allows you to expand and collapse the entire data set quickly to make or review changes.

Updated Data Connector Support

Several new data connectors are available or have been updated to allow your users to connect to a wider range of sources.

- [Amazon Simple Storage Service Connector \(S3\)](#) now supports the S3A protocol.
- You can now add the IBM DB2 Connector in your Visual Data Discovery module.
- We have added support for the [Business Central Connector](#).

Expanded Accessibility

We have updated our accessibility support for content viewed in full screen mode or embedded in your own application. These updates include features such as keyboard support, accessible names for more non-text content, and use of `aria-label`.

For more information, see [Accessibility](#).



Playground Updates

[Symphony Developer Playground](#) is a hosted, embedded Playground environment that allows you to explore a space dedicated to our low-code, rapid development tools crafted for software teams. Dive into white-labeling options, grab functional code samples, and discover straightforward embedding features. Start effortlessly creating interactive analytics embeddable content that suits your brand and business needs.

Table Visual Updates

Define the columns you want to include in a table visual when you create the visual. After you've selected your source and the table visual type, select to include one or more columns quickly and easily. Select **Create Visual** to generate your visual. If you select no columns, all columns are included by default.

See [Tables](#).

Export Dates in ISO 8601 Format

You now have the option to export and share dates as an ISO 8601 date in XLSX format. This preserves any formatting you've applied to your data while allowing Excel users to recognize and manipulate the exported dates as dates in Excel.

See [Export Raw Data in CSV or XLSX Format](#) and [Schedule a Dashboard Report](#).

Data Preparation and Analysis

In Managed Dashboards and Reports, add placeholders to SQL Select expressions that can be set via parameters.

You can now use Array type columns from PostgreSQL or Vertica in an SQL Select configuration for filtering purposes.

Design and View

You can now create content in Managed Dashboards and Reports that meets accessibility standards more easily by adding and associated accessible names and taking advantage of various improvements to built-in filters and components.

Password-protect your exported PDFs from Managed Dashboards and Reports, and optionally require this password protection when exporting.

API / Branding / Integration

When logging on using [.NET](#) or [REST](#) with administrator credentials and setting EffectiveAccountName/EffectiveCredentials, optionally also apply CustomAttributes or set AccountProperties to create or update an account.

Access data cube storage run time details by calling [GET /DataCube/StorageInfo/](#) to get [StorageInfoData](#) or [getStorageInfo](#) in JavaScript to get [StorageInfo](#).



- Archive of documentation for Logi Symphony v24

Scheduled Reports Frequency

A new frequency option for sending scheduled dashboard reports in Visual Data Discovery, **Days**, allows you to schedule a report for generation and sharing on more than one day a week with a few simple selections. Create a new schedule or edit an existing schedule to meet your needs.

See [Schedule a Dashboard Report](#).



Symphony 24.3 Release Notes

This topic describes feature enhancements, resolved issues, and important information for Symphony 24.3.

To purchase this product, contact [insightsoftware Sales](#).

- [Beta Features in this Release](#)
- [Feature Enhancements](#)
- [API Updates](#)
- [Resolved Issues](#)
- [Deprecated Features](#)
- [Removed Features](#)
- [Changes in this Version](#)
- [Known Issues](#)

See also [Deprecated FeaturesSymphony 24 Release Notes Overview](#), [Deprecated Features](#), and [Symphony Release Vehicles and Third Party End of Life Policy](#).

Beta Features in This Release

This release of Symphony may contain some features and enhancements in a beta test state so you can try them out in a non-production environment. Assess how they work in your environment, or provide feedback to insightsoftware as part of a formal beta testing process.



Important: Do not use beta features in a production environment or on mission-critical systems.

Name	Beta Version	Description	Final Release Version
Logi AI	24.1	Logi Symphony introduces Logi AI, a comprehensive AI and Natural Language Generation (NLG) module designed to transform the way you analyze your	N/A

Name	Beta Version	Description	Final Release Version
		data. Logi AI is a flexible AI platform that enables you to build and embed your own AI-powered chatbots directly into dashboards and visualizations in partnership with Flowise. Embedded chatbots help you elevate the user experience, making complex data analytics intuitive and effective for informed data-driven decisions. Adjust chatflows based on your use cases, domain policies, and security policies to ensure actionable insights are easily accessible and perfectly aligned with your strategic goals. Backup your chatflows manually. Four starter templates are available from insightsoftware in the Flowise market place. For more information, see Logi AI and Logi AI Solutions.  Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.	

Feature Enhancements

Title	Description
Symphony SaaS for Small Business	SaaS for Small Business is a new way to leverage data analytics in your organization with Logi Symphony. We'll deploy and manage your instance in the cloud, providing you and your users with secure access to the information they need to make data-driven decisions.
Expanded Dashboard Sharing	We've made it easier to share your Visual Data Discovery dashboards with your users in Symphony. Now you can optionally share dashboards with established groups and users in your tenant at once, making the objects available to users within those groups and tenants easily. For more information see Share and Export Symphony Dashboards and Reports or Share a Dashboard with Users.
Flowise AI	You can now utilize chatflows created with Logi AI to generate SQL statements in Visual Data Discovery. Use these generated statements as-is or customize to meet your data retrieval needs. Additionally, you can use the

Title	Description
	new marketplace Logi AI SQL chatflow template to quickly get started. See Generate SQL Statements .
Doc Assist	Symphony now includes a natural language tool, Doc Assist, for all available modules in insightsoftware hosted environments: Select a help icon in any available work area in Visual Data Discovery, Managed Dashboards and Reports, or Logi AI to open Doc Assist. Ask a question about the work area you're in and Doc Assist returns answers and suggestions based on your request, including links to more expansive documentation as needed.
.NET 8 Support	The Managed Dashboards and Managed Reports modules, along with the core of Symphony, now supports .NET 8. When you upgrade from a previous version of Symphony, your environment is updated with this support as part of the upgrade process.
Migrate Dundas to Symphony	You can now upgrade and migrate your Dundas environment to Logi Symphony. Users, groups, tenants, connections, projects, and other objects can be used in your updated environment, combined with the benefits of Visual Data Discovery and, optionally, Logi AI.
Redis Caching	You can now use a Redis cache as part of your Symphony environment. Deploy a Redis subchart using the helm chart, then select the <code>RedisCacheProvider</code> when you configure your custom cache provider.
Table of Contents Navigation	Optionally set up a report's table of contents for use with a PDF viewer's navigation options without necessarily including them directly in the report's contents.
Regional Setting - Australia	You can now select Australia as a regional preset when you define regional settings for your users.
PostgreSQL Support	Symphony now uses PostgreSQL 16 by default for new installations. You can now upgrade to this version in existing installations as needed.
IBM Db2 Support	IBM Db2 support has been expanded to include using the gateway to connect to an on-premise database from the cloud.
Clear Filters	Click to clear all filters at once in a data cube filter transform .
PDF Navigation	Use your PDF viewer's navigation options when viewing a slideshow exported to PDF to navigate between the included dashboards and reports.
Data Visualizations	New data point label Outside Alignment options can place labels at their corners in charts and other visualizations.

API Updates

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.



Visual Data Discovery Module

Endpoint	Method	Description
None.		

Managed Dashboards and Managed Reports Modules

Endpoint	Description
ModifyGroupMembershipForAccount ModifyGroupMembershipForGroup	.NET API methods ModifyGroupMembershipForAccount and ModifyGroupMembershipForGroup now return a value.
REST API	The OpenAPI file describing the REST API is not included in this version due to changes in third party tools, but it will be re-added in future versions.

Resolved Issues

Symphony

Title	Description
Supplied Administrator Password	Corrected an issue that allowed the change of the supplied administrator user password in a Kubernetes environment, which prevented the application from launching.

Visual Data Discovery Module

Title	Description
Derived Fields	Corrected an issue that prevented attributes from being converted from text to time (creating a derived field) within a fused data source.
Scheduled Reports	Corrected an issue that prevented simultaneous scheduled report generation in a multi-tenant environment.



Managed Dashboards and Managed Reports Modules

Description
Made the built-in data discovery record retrieval count configurable with a default of 100000 and upped the default OData setting to 10000.
The number of database connections has been reduced for data cube warehouse storage jobs, reducing the likelihood of connection pool exhaustion errors when running many at once.
Addressed an issue that could cause DateTime values to be passed incorrectly into Python transforms when using placeholders.
Prevented the screen from being blocked while waiting for a data cube storage job to complete when running in a separate microservice.
Fixed items appearing to be duplicated in the Layers window.
Fixed input controls not appearing for DateTimeOffset parameters in a data cube transform.
Addressed errors and reliability issues that could be experienced in some cases when using a Python transform.
Fixed an issue causing parameter values to be specified incorrectly in queries in certain cases for data providers such as Snowflake.
Fixed an error that could appear when opening Data Preview in a data cube after de-selecting a column in a manual select transform's configuration.
Fixed interactions not firing in tables set to use an indented row header layout when Bound Visual is set to a row header column's values.
Fixed errors and other issues that could occur when users belonging to multiple tenants switched between them after logging in using federated authentication.
Fixed an issue that could cause a transform parameter's value to not take effect correctly for a fixed length text column from a PostgreSQL database or warehoused data cube.
Fixed some column headers not displaying the correct text from a localization library when exported to Excel.
Fixed incorrect characters displayed in chart axis titles set to use placeholder keywords when the replacement values contain characters such as apostrophes.
The cultureName URL parameter value on the login screen now takes effect when logging in using federated authentication.
Fixed an issue affecting data connectors using the SharePoint Online List data provider where the uploaded certificate file may be lost after a period of time.
Fixed input controls not appearing in some cases for Boolean parameters in a data cube transform.
Fixed incorrectly cached response headers resulting in errors for some iframeless embedding requests when accessing the application from multiple origins and specifying them individually in the CORS configuration setting.

Deprecated Features

Symphony

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
None.	

Removed Features

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		



Changes in this Version

Managed Dashboards and Reports

Description
Optionally include a report's table of contents in PDF exports for use with PDF viewer navigation options without including it directly in the report contents.
When exporting slideshows to PDF, you can now click in a table of contents sidebar or similar in most PDF viewers to navigate between contents.
In a load balanced deployment, session affinity is no longer required after enabling the new Redis cache provider via the Helm chart, or if Redis is installed separately and connected via the application's configuration settings in Administration.
.NET version 8 is now used to run the application.
The <code>Or</code> operator in data cube filter transforms is now performed by the underlying data source to reduce the data transferred into application memory, as done previously for <code>And</code> .
Warnings will be displayed to users when changing their password if applicable, for example if the change will be overridden by a Helm chart configuration.
Click to clear all filters at once when configuring a data cube filter transform.
Data point labels can be positioned at the corners of data points, for example on top of a line in a chart showing a constant value but at the right edge of the plotting area.
Data Cube transforms now support adding expressions like those you can add to a SQL Select if the data cube you are selecting data from is using warehouse storage.
Added support to the gateway for connecting to an on-premise IBM Db2 database from the cloud.

Known Issues

Affected Releases	Description
Symphony 24.3 and later	None.



Symphony 24.3 Enhancements

This topic provides details about the enhancements in Composer 24.3.

To purchase this product, contact [insightsoftware Sales](#).

- [Expanded Dashboard Sharing](#)
- [Flowise AI](#)
- [Doc Assist](#)
- [.NET 8 Support](#)
- [Migrate Dundas to Symphony](#)
- [Redis Caching](#)
- [Table of Contents Navigation](#)
- [Regional Setting - Australia](#)
- [PostgreSQL Support](#)
- [IBM Db2 Support](#)
- [Clear Filters](#)
- [PDF Navigation](#)
- [Data Visualizations](#)



Expanded Dashboard Sharing

We've made it easier to share your Visual Data Discovery dashboards with your users in Symphony. Now you can optionally share dashboards with established groups and users in your tenant at once, making the objects available to users within those groups and tenants easily.

For more information see [Share and Export Symphony Dashboards and Reports](#) or [Share a Dashboard with Users](#).

Flowise AI

You can now utilize chatflows created with Logi AI to generate SQL statements in Visual Data Discovery. Use these generated statements as-is or customize to meet your data retrieval needs. Additionally, you can use the new marketplace Logi AI SQL chatflow template to quickly get started.

See [Generate SQL Statements](#).

Doc Assist

Symphony now includes a natural language tool, Doc Assist, for all available modules in insightsoftware hosted environments:

Select a help icon in any available work area in Visual Data Discovery, Managed Dashboards and Reports, or Logi AI to open Doc Assist. Ask a question about the work area you're in and Doc Assist returns answers and suggestions based on your request, including links to more expansive documentation as needed.

.NET 8 Support

The Managed Dashboards and Managed Reports modules, along with the core of Symphony, now supports .NET 8. When you upgrade from a previous version of Symphony, your environment is updated with this support as part of the upgrade process.

Migrate Dundas to Symphony

You can now upgrade and migrate your Dundas environment to Logi Symphony. Users, groups, tenants, connections, projects, and other objects can be used in your updated environment, combined with the benefits of Visual Data Discovery and, optionally, Logi AI.

Redis Caching

You can now use a Redis cache as part of your Symphony environment. Deploy [a Redis subchart](#) using the helm chart, then select the `RedisCacheProvider` when you configure your custom cache provider.

Table of Contents Navigation

Optionally set up a report's [table of contents](#) for use with a PDF viewer's navigation options without necessarily including them directly in the report's contents.



Regional Setting - Australia

You can now select Australia as a regional preset when you define regional settings for your users.

PostgreSQL Support

Symphony now uses PostgreSQL 16 by default for new installations. You can now upgrade to this version in existing installations as needed.

IBM Db2 Support

IBM Db2 support has been expanded to include [using the gateway](#) to connect to an on-premise database from the cloud.

Clear Filters

Click to clear all filters at once in a data cube [filter transform](#).

PDF Navigation

Use your PDF viewer's navigation options when [viewing a slideshow](#) exported to PDF to navigate between the included dashboards and reports.

Data Visualizations

New [data point label](#) Outside Alignment options can place labels at their corners in charts and other visualizations.



Symphony 24.2 Release Notes

This topic describes feature enhancements, resolved issues, and important information for Symphony 24.2.

To purchase this product, contact [insightsoftware Sales](#).

- [Beta Features in this Release](#)
- [Feature Enhancements](#)
- [API Updates](#)
- [Resolved Issues](#)
- [Deprecated Features](#)
- [Removed Features](#)
- [Changes in this Version](#)
- [Known Issues](#)

See also [Deprecated FeaturesSymphony 24 Release Notes Overview](#), [Deprecated Features](#), and [Symphony Release Vehicles and Third Party End of Life Policy](#).

Beta Features in This Release

This release of Symphony may contain some features and enhancements in a beta test state so you can try them out in a non-production environment. Assess how they work in your environment, or provide feedback to insightsoftware as part of a formal beta testing process.



Important: Do not use beta features in a production environment or on mission-critical systems.

Name	Beta Version	Description	Final Release Version
Logi AI	24.1	Logi Symphony introduces Logi AI, a comprehensive AI and Natural Language Generation (NLG) module designed to transform the way you analyze your	N/A

Name	Beta Version	Description	Final Release Version
		data. Logi AI is a flexible AI platform that enables you to build and embed your own AI-powered chatbots directly into dashboards and visualizations in partnership with Flowise. Embedded chatbots help you elevate the user experience, making complex data analytics intuitive and effective for informed data-driven decisions. Adjust chatflows based on your use cases, domain policies, and security policies to ensure actionable insights are easily accessible and perfectly aligned with your strategic goals. Backup your chatflows manually. Four starter templates are available from insightsoftware in the Flowise market place. For more information, see Logi AI and Logi AI Solutions.  Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.	
Managed Dashboard Data Connections	23.4.1	You can now create data sources in Visual Data Discovery data cubes or data connectors. See Add Data Store ConnectionsAdd Data Discovery Data Store Connections and Define a SourceDefine a Visual Data Discovery Source..	24.2

Feature Enhancements

Title	Description
Logi Symphony in Cloud Marketplaces	
Symphony SaaS for Small Business	SaaS for Small Business is a new way to leverage data analytics in your organization with Logi Symphony. We'll deploy and manage your instance in the cloud, providing you and your users with secure access to the information they need to make data-driven decisions.
Source Creation Enhancements	We've enhanced the user experience for source creation by introducing visualization of data relationships for

Title	Description
	schemas. ■ Navigate to the Relationship tab for a specific connection, then select a schema from the available schemas to view or edit the relationships for each. ■ Select a schema and view the relationships in read only mode for your data sources in the Entity Details work area for that data source. ■ When you're working with joins, view available joins and create new joins as needed. Recommended joins and joins you add are visible in the join relationship visualization; from there you can draw new joins according to your specific needs. ■ Visualization is available for multiple connection types. For Postgres connections, Symphony provides tables and default database relationship data from the connection. For more information, see Visualize Schemas and Joins, Source Creation Tab, and Visualize Joins.
SAP S/4HANA Support	Symphony now includes an SAP S/4HANA connector. See Manage the SAP S/4HANA Connector .
Upgrade to Symphony	You can now upgrade your Composer to Symphony. On upgrade, your users, groups, and tenants are imported into Symphony. Users need to update their passwords the first time they log in: see Migrate from Composer to Symphony for preparation and migration details.
Symphony 24.2 Enhancements	
UI and UX Improvements	■ Many menus, icons, and names have been updated throughout Symphony and the modules available to you in your environment to be more in sync with their associated tasks. ◦ For example, some context menus have been reorganized, making it easier to find the tasks you wish to perform. ◦ Drill down into presented data by selecting Drill-down in available menus, replacing the use of Zoom in context menus, panels, and other work areas. Other uses of Zoom in your software unrelated to examining data in greater detail remain unchanged. ◦ Changing the look of a visual or visualization is now done by selecting Re-visualize from the appropriate menu or other work area. This replaces the use of the term Visual Style in the user interface.
Tenant Management Improvements	You can now customize your Symphony environment more easily on a per-tenant basis. After upgrading to this

Title	Description
	version: - You can define custom attributes and default views for users on a per-tenant basis. - Assign users to tenants more easily, populating tenant membership across all modules in use in your environment. - Tenant IDs are now included in the screenshot service logs. - Tenant membership is synchronized across all installed Symphony modules. For more information, see Using Custom Attributes to Filter Data by User.
Managed Dashboard Data Connections	Previously a beta feature, this feature is now available in all Symphony environments where you use Managed Dashboards along with Visual Data Discovery. You can now create data sources in Visual Data Discovery data cubes or data connectors. Establish a connection to an available project in Visual Data Discovery then use to create a data source. After you've created the source, use it to create a visual in the Visual Gallery or in a dashboard. See Add Data Store ConnectionsAdd Data Discovery Data Store Connections and Define a SourceDefine a Visual Data Discovery Source.  Note: This feature is no longer in beta and can be used in production environments.
Table of Contents Navigation	When you add a table of contents to your reports, you can select each entry to navigate to the content in view mode. Symphony generates navigation links and a document outline when exported as a PDF. See Add a Table of Contents.
Export Numeric Fields and Dates	Exporting raw or visual data from visuals created in Visual Data Discovery to XLSX format now outputs numeric and date fields in number and date format.
RSA Key Signing Support	Symphony now supports the RSA asymmetric key signing algorithm when using JSON web token (JWT) authentication.
Select Individual Modules	Select the Symphony modules you prefer to install during installation: all modules, or exclude Logi AI, Managed Dashboards, or Visual Data Discovery as desired. See Install Symphony - Kubernetes.
Breaking Changes Management	We've expanded change management for breaking changes by adding your warning tags to sources or other

Title	Description
	objects, even if there are no other top level dependencies to that object. See Import or Export Sources.
Import Matching Strategy Improvements	When you migrate and import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. See Import Dashboards, Import Visual Gallery Visuals, and Import or Export Sources.
Improved Line Chart Performance	The data display of line charts in Symphony now supports rendering of large data sets more quickly by halting the calculation of values and percentages for data lengths over 130,000. When this threshold is reached, the Display as stacked option is disabled. Work with Support if you need to change the setting of <code>data-threshold</code> from the default of 130,000.
Change Schemas in Manual Select Transforms	You can now select a schema as needed when you create or edit manual select transforms that use supported data connectors. ■ Create a parameter for the session schema selection and make it public so viewers can change the schema on the dashboard. ■ Use custom attributes to filter and bind the selection options to a user or group. Enable Allow Session Schemas for the appropriate connectors to make this option available in your environment. Supported connectors include Oracle, Postgres, Redshift, MemSQL, MySQL, and Exasol. See Session Schema.
Map and Tree Visualization Updates	■ Customize the selection behavior and set up custom interactions when selection changes in maps, diagrams, and treemaps. ■ Map visualizations now have built-in support for Azure Maps for street level maps.



Title	Description
	See Using a Treemap and Using a Map Visualization .
Upgraded Python Requirements	The minimum supported version of Python for Managed Dashboards and Reports is Python 3.8.

API Updates

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Visual Data Discovery Module

Endpoint	Method	Description
/api/group-membership/{id}	PATCH	Manage group membership for users by updating a group: define <code>usersToAdd</code> and <code>usersToRemove</code> to include a single user or an array of users.
/api/inventory/{type}/ and /api/inventory/{type}/{id}	GET	If you created dashboards and visuals that include your own <code>originID</code> , calling this endpoint returns each item and their associated <code>originID</code> , if applicable.
/api/sources	GET/PUT	Use to return and define information for a source.
/api/sources/{sourceId}/clone	POST	Use to create a copy of a source.
/api/groups	POST, PUT	You can now assign an identifier to your groups using <code>externalId</code> that is unique across tenants. This does not change or replace the <code>accountId</code> assigned by Symphony. The <code>externalId</code> is not available in the UI.

Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
None.		



Resolved Issues

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
Ruler Log Scale Function	Corrected an issue that returned incorrect results from the log scale function if negative values or zero values were included. See Use the Ruler Log Scale Function .
Exporting Raw Data	Corrected an issue that prevented the export of visual data in visuals where the option Show Distinct Rows is used.
List Filter Selections	When you select multiple values in a list filter, Symphony includes a scrollbar to allow you to scroll among your selections as needed.
SAML SSO Integration	Corrected an issue that prevented use of Okta IdP to authenticate through SAML SSO.
Null Values	Resolved an issue with sources containing null values that prevented use in visuals and dashboards.
World Maps Filtering	You can now apply filters to the World Maps visual using the context menu.

Managed Dashboards and Managed Reports Modules

Description
Fixed an issue that could inconsistently cause an error message in certain scenarios like the following: <i>duplicate key value violates unique constraint "PK_ExternalGroupCache"</i> .
Fixed an issue that could occur when trying to re-wire a metric set causing an error reporting an element that cannot be found in certain cases.
Fixed an issue preventing sorting by measure values from being maintained after switching a dynamic hierarchy added to Rows when there is a hierarchy added to Columns.
Addressed cases where the message <i>no data was returned</i> was displayed where a count of zero could be expected as a result of filtering out the values.
Fixed an issue that could prevent upgrading or installing the Helm chart.
Embedding content without an iframe will now work on pages using RequireJS.
Fixed an issue that could result in an incorrect number of weeks to be assigned for certain months in time dimensions using the Reporting calendar, which can

Description

cause period-over-period comparison values to not match.

Fixed an issue preventing view parameters from being set via URL query string parameters when connected to a slicer comparison measure's filter (parallel slicer) parameter.

Deprecated Features

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
User Interface Naming Conventions	- The term Zoom has been replaced by the use of Drill-down. - The name Visual Style has been replaced by the use of the term Re-visualize.

Managed Dashboards and Managed Reports Modules

Title	Description
None.	

Removed Features

Symphony

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Changes in this Version

Managed Dashboards and Reports

Description
In the .NET API, the type of the CustomAttributes property has changed on the Account and Group classes , as well as on the AccountData and GroupData classes used in custom accounts provider extensions. If your .NET code refers to this property it may need to be changed, including code used in custom extensions.
New settings in data cubes and application configuration <i>Warehousing Timeout</i> and <i>Data Retrieval Timeout</i> allow you to set a maximum running length for data cube warehouse jobs and for retrieving of data for visualizations, respectively.
When exporting a table visualization to Excel, range format overrides set up for the measure will take effect in the exported values.
If your current license is already expired, the license auto-update feature will more proactively check for a new license to apply automatically.
When using federated authentication with OpenID Connect, a <i>responseType of code</i> is now supported for use with services such as AWS Cognito.
The usability has been improved for code library dialogs when both entering text and uploading a file.
You can now resize the Data Analysis Panel's width larger to accommodate longer element captions. Drag it by its title to reposition it if you need to resize further, or hover over elements to see their full caption in a tooltip as an alternative.
The Views, Data, and Business pages accessed from the main menu have improved support on mobile devices.
When exporting a table visualization to Excel, the large number formatting options on measures will now take effect in the exported values if the Format Large Values Separately option is selected.
A warning is displayed in the Data Preview window and in full screen metric sets as a popup when elements are removed from a metric set because they are missing from the underlying data cube.

Description
In menus such as the context menu opened on right-click or long-tap, submenus now open separately to the right on hover or click instead of replacing the original menu.
Map visualizations provide predefined options for Azure Maps with support for an Azure subscription key for authentication.
The usage tracking and performance tracking sample dashboards have been updated with usability and styling improvements.

Known Issues

Affected Releases	Description
Symphony 24.2 and later	None.



Symphony 24.2 Enhancements

This topic provides details about the enhancements in Composer 24.2.

To purchase this product, contact [insightsoftware Sales](#).

- [Source Creation Enhancements](#)
- [SAP S/4HANA Support](#)
- [Upgrade to Symphony](#)
- [UI and UX Improvements](#)
- [Tenant Management Improvements](#)
- [Managed Dashboard Data Connections](#)
- [Table of Contents Navigation](#)
- [Export Numeric Fields and Dates](#)
- [RSA Key Signing Support](#)
- [Select Individual Modules](#)
- [Breaking Changes Management](#)
- [Import Matching Strategy Improvements](#)
- [Improved Line Chart Performance](#)
- [Change Schemas in Manual Select Transforms](#)



- [Map and Tree Visualization Updates](#)
- [Upgraded Python Requirements](#)

Source Creation Enhancements

We've enhanced the user experience for source creation by introducing visualization of data relationships for schemas.

- Navigate to the **Relationship** tab for a specific connection, then select a schema from the available schemas to view or edit the relationships for each.
- Select a schema and view the relationships in read only mode for your data sources in the Entity Details work area for that data source.
- When you're working with joins, view available joins and create new joins as needed. Recommended joins and joins you add are visible in the join relationship visualization; from there you can draw new joins according to your specific needs.
- Visualization is available for multiple connection types. For Postgres connections, Symphony provides tables and default database relationship data from the connection.

For more information, see [Visualize Schemas and Joins](#), [Source Creation Tab](#), and [Visualize Joins](#).

SAP S/4HANA Support

Symphony now includes an SAP S/4HANA connector. See [Manage the SAP S/4HANA Connector](#).

Upgrade to Symphony

You can now upgrade your Composer to Symphony. On upgrade, your users, groups, and tenants are imported into Symphony.

Users need to update their passwords the first time they log in: see [Migrate from Composer to Symphony](#) for preparation and migration details.

UI and UX Improvements

Many menus, icons, and names have been updated throughout Symphony and the modules available to you in your environment to be more in sync with their associated tasks.



- For example, some context menus have been reorganized, making it easier to find the tasks you wish to perform.
- Drill down into presented data by selecting **Drill-down** in available menus, replacing the use of **Zoom** in context menus, panels, and other work areas. Other uses of **Zoom** in your software unrelated to examining data in greater detail remain unchanged.
- Changing the look of a visual or visualization is now done by selecting **Re-visualize** from the appropriate menu or other work area. This replaces the use of the term **Visual Style** in the user interface.

Tenant Management Improvements

You can now customize your Symphony environment more easily on a per-tenant basis. After upgrading to this version:

- You can define custom attributes and default views for users on a per-tenant basis.
- Assign users to tenants more easily, populating tenant membership across all modules in use in your environment.
- Tenant IDs are now included in the screenshot service logs.
- Tenant membership is synchronized across all installed Symphony modules.

For more information, see [Using Custom Attributes to Filter Data by User](#).

Managed Dashboard Data Connections

Previously a beta feature, this feature is now available in all Symphony environments where you use Managed Dashboards along with Visual Data Discovery.

You can now create data sources in Visual Data Discovery data cubes or data connectors. Establish a connection to an available project in Visual Data Discovery then use to create a data source. After you've created the source, use it to create a visual in the Visual Gallery or in a dashboard.

See [Add Data Store Connections](#)[Add Data Discovery Data Store Connections](#) and [Define a Source](#)[Define a Visual Data Discovery Source](#).



Note: This feature is no longer in beta and can be used in production environments.

Table of Contents Navigation

When you add a table of contents to your reports, you can select each entry to navigate to the content in view mode. Symphony generates navigation links and a document outline when exported as a PDF.



- Archive of documentation for Logi Symphony v24

See [Add a Table of Contents](#).

Export Numeric Fields and Dates

Exporting raw or visual data from visuals created in Visual Data Discovery to XLSX format now outputs numeric and date fields in number and date format.

RSA Key Signing Support

Symphony now supports the RSA asymmetric key signing algorithm when using JSON web token (JWT) authentication.

Select Individual Modules

Select the Symphony modules you prefer to install during installation: all modules, or exclude Logi AI, Managed Dashboards, or Visual Data Discovery as desired.

See [Install Symphony - Kubernetes](#).

Breaking Changes Management

We've expanded change management for breaking changes by adding your warning tags to sources or other objects, even if there are no other top level dependencies to that object.

See [Import or Export Sources](#).

Import Matching Strategy Improvements

When you migrate and import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy.

Matching strategies are processed in order, proceeding to the next and the next if a strategy fails.

If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues.

These attributes are used to define the matching strategy and warning tags to use for import.

See [Import Dashboards](#), [Import Visual Gallery Visuals](#), and [Import or Export Sources](#).

Improved Line Chart Performance

The data display of line charts in Symphony now supports rendering of large data sets more quickly by halting the calculation of values and percentages for data lengths over 130,000.



When this threshold is reached, the **Display as stacked** option is disabled. Work with Support if you need to change the setting of `data-threshold` from the default of 130,000.

Change Schemas in Manual Select Transforms

You can now select a schema as needed when you create or edit manual select transforms that use supported data connectors.

- Create a parameter for the session schema selection and make it public so viewers can change the schema on the dashboard.
- Use custom attributes to filter and bind the selection options to a user or group.

Enable **Allow Session Schemas** for the appropriate connectors to make this option available in your environment.

Supported connectors include Oracle, Postgres, Redshift, MemSQL, MySQL, and Exasol.

See [Session Schema](#).

Map and Tree Visualization Updates

- Customize the selection behavior and set up custom interactions when selection changes in maps, diagrams, and treemaps.
- Map visualizations now have built-in support for Azure Maps for street level maps.

See [Using a Treemap](#) and [Using a Map Visualization](#).

Upgraded Python Requirements

The minimum supported version of Python for Managed Dashboards and Reports is Python 3.8.



Symphony 24.1 Release Notes

This topic describes feature enhancements, resolved issues, and important information for Symphony 24.1.

To purchase this product, contact [insightsoftware Sales](#).

- [Beta Features in this Release](#)
- [Feature Enhancements](#)
- [API Updates](#)
- [Resolved Issues](#)
- [Deprecated Features](#)
- [Removed Features](#)
- [Changes in this Version](#)
- [Known Issues](#)

See also [Deprecated FeaturesSymphony 24 Release Notes Overview](#), [Deprecated Features](#), and [Symphony Release Vehicles and Third Party End of Life Policy](#).

Beta Features in This Release

This release of Symphony may contain some features and enhancements in a beta test state so you can try them out in a non-production environment. Assess how they work in your environment, or provide feedback to insightsoftware as part of a formal beta testing process.



Important: Do not use beta features in a production environment or on mission-critical systems.

Name	Beta Version	Description	Final Release Version
Logi AI	24.1	Logi Symphony introduces Logi AI, a comprehensive AI and Natural Language Generation (NLG) module designed to transform the way you analyze your	N/A

Name	Beta Version	Description	Final Release Version
		data. Logi AI is a flexible AI platform that enables you to build and embed your own AI-powered chatbots directly into dashboards and visualizations in partnership with Flowise. Embedded chatbots help you elevate the user experience, making complex data analytics intuitive and effective for informed data-driven decisions. Adjust chatflows based on your use cases, domain policies, and security policies to ensure actionable insights are easily accessible and perfectly aligned with your strategic goals. Backup your chatflows manually. Four starter templates are available from insightsoftware in the Flowise market place. For more information, see Logi AI and Logi AI Solutions.  Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.	
Managed Dashboard Data Connections	23.4.1	You can now create data sources in Visual Data Discovery data cubes or data connectors. Establish a connection to an available project in Visual Data Discovery then use to create a data source. After you've created the source, use it to create a visual in the Visual Gallery or in a dashboard. See Add Data Store ConnectionsAdd Data Discovery Data Store Connections and Define a SourceDefine a Visual Data Discovery Source.  Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.	N/A

Feature Enhancements

Title	Description
Logi Symphony Software As A Service	Logi Symphony is now available as a fully-hosted Software as a Service (SaaS) solution. This managed implementation allows you and your users to leverage the extensive capabilities of Symphony without the back-end upkeep of managing security, upgrades, and features. Designed to scale for your needs and provide a seamless onboarding experience, use Symphony directly, or as embedded components in your own environment. Contact your sales team to get started! For more information, see Logi Symphony - Software as a Service (SaaS) and Logi Symphony SaaS Solutions.
Logi Symphony For Visual Data Discovery	You can now deploy and use only the Visual Data Discovery module in Symphony. Use the capabilities of this module as an entire deployment, installed directly or hosted as an SaaS with insightsoftware. Users can use Symphony directly, access their data in an embedded environment, and belong to one or more tenants as needed. See Install Symphony - Kubernetes.
Groups Management	Groups management is now a streamlined experience in Symphony. Create groups in the Symphony interface, and make privilege changes to groups in each module as needed. You can also add users to multiple groups at user creation time. When you create, edit, and update groups, the changes are shared across all of your licensed modules in your environment, and within applicable tenants. System Administrators can manage all groups and users in groups. View all groups across all tenants by selecting Groups from the main menu: searchable tags for each group tell you which tenant is associated with each group. Tenant Admins can manage users and groups associated with the tenants they administer. View all groups in a tenant by selecting Groups from the main menu while you're working in that tenant. Switch between tenants as needed to view that tenant's groups. If you're a member of multiple tenant groups that use Visual Data Discovery, you can switch between tenants to see a list of the groups for each tenant. For more information, see Symphony User Groups and Create And Edit Symphony Groups.
Enhanced Filter Security Capabilities	We've expanded the filter capabilities to present data more securely to your users. Filter values can be shown in masked format if you want to filter based on confidential data.

Title	Description
	■ To enable, disable Filtering for fields in a data source for one or more data columns on the Fields tab of that data source. ■ Next, set the Value and Display fields in your filter snippets based on your needs. ■ When you view tool tips or hover over fields that have Filtering disabled, you won't see the actual values. Instead, you'll see a generic reference, such as a count of "filter values" or a series of asterisks *****.  Important: Applied filter values that later have Filtering disabled to not automatically mask or hide those fields. You must recreate the filter that uses these values. You can now set and apply filters to filter snippets. Select a source to apply the filter in the filter snippet. See Filter Data With Masked Fields.
Content Migration Flow Improvements and Breaking Changes Management Expansion	■ You can now import and export visuals directly in the Visual Gallery user interface. Import and export one or more visuals in bulk. Import and Export includes any supporting objects the visuals are dependent on, such as data sources and connections. ■ When you import dashboards, visuals, and sources, Content Distributor group members and other users with appropriate privileges can enable Share Default Access With All Users. When enabled, in the UI or as an API option, users in the tenants you selected for import can access to these resources immediately based on default access levels. ■ View improved real-time import validation results, address errors, and suppress warnings for later handling with more options to correct issues in your environment. ■ The import process now considers an <code>origin.id</code> when importing objects: it is stored for every imported object on the target system. ◦ When you import using the API, you can select a matching strategy for reusing and updating objects. See API Updates for more information. ■ When you select Ignore Warnings during import, a Tags field is added to the Import work area. Add or

Title	Description
	create tags to apply to objects that do not import cleanly. ◦ If errors occur during import, Symphony adds the tags you select to affected objects. ◦ Use these tags to find the dashboards, visuals, filter snippets, or sources you need to fix. ■ You can also create or add tags for items that don't import cleanly when you import via API. For more information, see Import Dashboards, Import A Data Discovery Dashboards, Import Visual Gallery Visuals, and Import or Export Sources.
Lite Dashboard for Self-Service Environments	We've added a simplified lite dashboard to your Symphony environment for Data Discovery content. You can now embed a lite dashboard complete with its own interactivity settings, designed to get your users up and running quickly and easily. Users can create dashboards with the default visual format as a table visual. Once created, users can: ■ Edit the visual's fields and settings, and optionally change the visual type to an available visual type. ■ Select an available visual type if the data source doesn't support a table visual, then edit the visual as needed. Available visual types include: Table (default), Bars, Bars:Multiple Metrics, Donut, KPI, Packed Bubbles, Pie. Customize this list further in your embed code as needed to add or remove other visual types.
Suppress Time Zone Labels	You can now opt to suppress time zone labels in the Symphony Data Discovery user interface. After upgrading to this version, you can update the Data Details of your time fields in a data source and suppress the labels. Select Not Specified instead of a time zone to hide time zone information in the user interface and when users export data.
Self Service Reporting Improvements	Report editing features in the Managed Reports module are now controlled by a set of Application Privileges. Enable or disable (allow or deny) as needed for users and groups to give you the flexibility to offer your users a simplified report editing experience. The new application privileges are: Report Advanced Dockable Windows, Report Advanced Toolbar Options, Report Data Visualizations, and Report Styles & Themes.
Multi-Tenancy Improvements	We've expanded and improved multi-tenancy in Symphony to make it easier to manage tenants, add users to multiple tenants, work with tenant and user content, and for users to navigate between tenants if they belong to multiple tenants.

Title	Description
	▪ Add new users to multiple tenants at account creation time. ▪ Easily edit users, changing their tenant status, admin or system admin status, member of the Global User group, or content distributor. ▪ Users can switch easily between tenants from the main menu, and verify what tenant they are working in. The tenant a user is working in is always at the top of their tenant list and indicated with a check mark. ▪ The minimum length for a tenant name has been removed. Symphony only verifies that the tenant name is not empty. ▪ System admins are listed with an Admin tag in the Name column on the main Users landing page. Only Global Users can be system admins, and show a Global User tag in the Tenants column. ▪ Sources created in the Visual data discovery module are visible only in a tenant where it is created, and optionally to other tenants as assigned. For more information, see Multi-Tenancy in Symphony and Add New Users.
Embed Data Discovery Components in Managed Dashboards Embed Data Discovery Components in Managed Dashboards	Present a comprehensive view of the information in your environment in one place, utilizing the full capabilities of Symphony. You can now include any data discovery object in your managed dashboards to bring all of your data into Symphony. Add existing dashboards or visuals as components to a managed dashboard, and edit the properties as you would for any component: adjust the main properties, the look, and the layout. You can additionally add a component by selecting the (new) option instead of existing content. This lets users to work with available data to create a visual or dashboard in a managed dashboard and see data in a different context. Select different interactivity settings for dashboard components as needed.
Data Cube Discovery Enhancements	When you create or edit a data cube using a manual select transform, you can now set a temporary limit for discovering data as you build and test. This temporary limit allows you to build and test your data cube, and still run it against the full data set when complete.

API Updates

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Visual Data Discovery Module

Endpoint	Method	Description
24.1 API Updates		
/api/sources/export	GET	These attributes are returned for sources in your environment. Include these attributes to work with import matching strategies. ■ <code>connections[].originId</code> - Returns the value of the connection ID from the imported connection. ■ <code>sources[].originId</code> - Returns the value of the source ID from the imported source
/api/sources/import	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. Send as an array; each strategy is considered in order. ■ <code>importSettings.objectClassLevel.connections.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for connections. This array can include: ◦ <code>BY_ORIGIN_ID</code> ◦ <code>BY_ID_AND_TYPE_AND_PARAMS</code> ◦ <code>BY_TYPE_AND_PARAMETERS</code> ◦ <code>BY_NAME_AND_TYPE</code> ◦ <code>BY_TYPE_AND_PARAM_KEYS</code> ◦ <code>BY_NAME</code> If an order is not specified, the default strategy of <code>BY_ID_AND_TYPE_AND_PARAMS</code> or

Endpoint	Method	Description
		BY_TYPE_AND_PARAMETERS is used. - importSettings.objectClassLevel.sources.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for sources. This array can include: - BY_ORIGIN_ID - BY_NAME If an order is not specified, the default strategy of BY_NAME is used. - importSettings.warningTags[] - Send an array of warning tags to apply to objects imported with warnings. Send enableDefaultRead to enable data read permissions for the sources imported for all users in the tenant.
/api/dashboards/export/	GET	These attributes are returned for dashboards in your environment. Include these attributes for importing. - connections[].originId - Returns the value of the associated connection ID. - sources[].originId - Returns the value of the associated source ID. - visuals[].originId - Returns the value of the associated visual ID. - dashboards[].originId - Returns the value of the associated dashboard ID.
/api/dashboards/import/	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import.

Endpoint	Method	Description
		Send as an array; each strategy is considered in order. importSettings.objectClassLevel.connections.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for connections. This array can include: - BY_ORIGIN_ID - BY_ID_AND_TYPE_AND_PARAMS - BY_TYPE_AND_PARAMETERS - BY_NAME_AND_TYPE - BY_TYPE_AND_PARAM_KEYS - BY_NAME If an order is not specified, the default strategy of BY_ID_AND_TYPE_AND_PARAMS or BY_TYPE_AND_PARAMETERS is used. importSettings.objectClassLevel.visuals.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for visuals. This array can include: - BY_ORIGIN_ID - BY_NAME If an order is not specified, the default strategy of BY_NAME is used. importSettings.objectClassLevel.sources.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for sources. This array can include: - BY_ORIGIN_ID - BY_NAME If an order is not specified, the default strategy of BY_NAME is used. importSettings.objectClassLevel.dashboards.matchingStrategy[] - Send an array of matching strategies to be considered, in order, for dashboards. This array can

Endpoint	Method	Description
		include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ▪ <code>importSettings.warningTags[]</code> - Send an array of warning tags to apply to objects imported with warnings. Send <code>enableDefaultRead</code> to enable data read permissions for the sources imported for all users in the tenant.
/api/visuals/export/	GET	These attributes are returned for visuals in your environment. Include these attributes for importing. ▪ <code>connections[].originId</code> - Returns the value of the associated connection ID. ▪ <code>sources[].originId</code> - Returns the value of the associated source ID. ▪ <code>visuals[].originId</code> - Returns the value of the associated visual ID.
/api/visuals/import/	POST	When you import objects into your environment, you can define a matching strategy that uses multiple approaches to reviewing objects to determine how to handle them in conjunction with your selected insertion strategy. Matching strategies are processed in order, proceeding to the next and the next if a strategy fails. If all strategies fail, the object is imported and tagged with your selected tags to help you find affected objects and manage any issues. These attributes are used to define the matching strategy and warning tags to use for import. Send as an array; each strategy is considered in order. ▪ <code>importSettings.objectClassLevel.connections.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for connections. This array can include:

Endpoint	Method	Description
		◦ BY_ORIGIN_ID ◦ BY_ID_AND_TYPE_AND_PARAMS ◦ BY_TYPE_AND_PARAMETERS ◦ BY_NAME_AND_TYPE ◦ BY_TYPE_AND_PARAM_KEYS ◦ BY_NAME If an order is not specified, the default strategy of BY_ID_AND_TYPE_AND_PARAMS or BY_TYPE_AND_PARAMETERS is used. ■ <code>importSettings.objectClassLevel.visuals.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for visuals. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ■ <code>importSettings.objectClassLevel.sources.matchingStrategy[]</code> - Send an array of matching strategies to be considered, in order, for sources. This array can include: ◦ BY_ORIGIN_ID ◦ BY_NAME If an order is not specified, the default strategy of BY_NAME is used. ■ <code>importSettings.warningTags[]</code> - Send an array of warning tags to apply to objects imported with warnings. Send <code>enableDefaultRead</code> to enable data read permissions for the sources imported for all users in the tenant.
<code>/api/accounts/name/{name}</code>	GET	This takes the <code>{name}</code> of the tenant account as a path parameter and returns tenant account details. Works similarly to <code>/api/accounts/{id}/</code> .



Managed Dashboards and Managed Reports Modules

Endpoint	Method	Description
None.		

Resolved Issues

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
Custom Attributes	Corrected an issue that returned an error when creating user accounts as members of the Administrators Group and incorporating encrypted custom attributes with special characters.
Color Palettes for Visuals	KPI visuals now utilize the selected custom color palettes when Inherit from theme is disabled.
Embedded Source Editor	Corrected an issue that prevented return of an updated source editor in an embedded environment when updating embedded components shared to your application.
Filter Snippets	Corrected a display issue that prevented full access to filter lists for filter snippets.
Visual Data Export	Corrected an issue that prevented Symphony from exporting the default number of rows. If you need to export more than 100,000 rows, adjust the property <code>zoomdata.export.visualdata.max.rows</code> in zoomdata.properties Properties .
Source Deletion	Corrected an issue that prevented deletion of a source with in-dashboard visuals not attached to any dashboard in the system.
ElasticSearch	Corrected an issue with connecting to ElasticSearch 8.3.



Managed Dashboards and Managed Reports Modules

Description
Clicking or right-clicking a Data Cube transform and choosing Refresh will now update the element names based on the source data cube.
Fixed an issue that could prevent a job failure email from being sent and log an invalid session exception when configured to send it to the application maintainer.
Fixed an issue where setting the isDownloadLink URI parameter to false in a REST request to /Export/Result/ was no longer responded to with the correct headers to open the file directly in the browser.
Fixed an issue preventing some date/time token values from working as expected in a filter transform when using greater/less than operators, allowing you to choose whether to apply the upper or lower boundary value of the calculated token.
Fixed an issue that could cause grand total text to be missing the color assigned based on state conditions when exported to Excel.
Addressed custom total text not being applied to the grand total column when exporting to Excel.
Prevented unnecessary changes made automatically to table visualizations starting in version 23.4 when displaying indented row headers with totals disabled for hierarchies not being visualized, and addressed related issues such as no change when choosing indented row headers when using certain hierarchy totals settings.
Fixed an issue that caused formulas to stop calculating subsequent rows after the formula script encounters an error.
Fixed an error preventing a metric set file from being opened if its saved visualization included a template cell ID.
Fixed an issue that could prevent single sign-on using federated authentication from working when embedded in an iFrame on a page with a different origin/domain.
Fixed an issue that could prevent view parameters from remaining connected to a slicer comparison measure when adding new slicer hierarchies.
Fixed an issue that could cause numeric columns from Google BigQuery to be discovered as the incorrect type.
Specifying IsGlobal/isGlobal as true is no longer required when creating an account through the API on instances without multi-tenancy or without any tenants.

Deprecated Features

Symphony

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
None.	

Removed Features Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Changes in this Version

Managed Dashboards and Reports

Description
24.1 Changes in this Version
To update the default visualization saved in the underlying metric set based on the current visualization in a dashboard or other view, first click Visualization in the Data Analysis Panel and then click Update Metric Set.
When deploying on Kubernetes, the default value for dundas.bi.website.service.sessionAffinity has been changed from ClientIP to None if not set in your own YAML values.
The Unknown Member Caption for a hierarchy in the Data Analysis Panel can now easily be customized to be blank/empty.
When you need to re-upload a file when creating or editing a data connector, you no longer need to first save or close and re-open it.
The Microsoft SQL Server data provider uses improved functions for the datetime2 data type and for time dimensions and date trimming if available in newer SQL Server/Azure SQL versions.
When exporting to a DBIE file in Administration, a search box has been added for more easily locating and selecting project files.
When scheduling a notification for a report, you can now export to the Image and PowerPoint formats.
The Check Warnings button when editing a ragged hierarchy now checks for an invalid level depth value.
When upgrading an instance running on Kubernetes with an evaluation license, the license is now updated automatically to be valid for the new version.
Users belonging to multiple tenants can see the currently selected tenant and switch between them more easily using the Profile menu.
UI improvements have been made for exporting a DBIE file to better support accounts belonging to multiple tenants.
When importing a DBIE file containing accounts that also belong to a tenant not included and not already present, references to that tenant are now removed automatically rather than requiring a health check to be run afterward.
A new built-in Global Users group includes all accounts set as global rather than belonging to specific tenants on multi-tenant instances.
The styling of the Properties window has been updated to better differentiate between headings and navigable list items on a wider variety of displays.
Assign optional colors to your data cube transforms to help categorize and identify them.
The included version of jQuery has been updated to 3.7.1.
New report application privileges have been added that can be denied to certain users or groups to provide them with a simplified report design experience when not all functionality is required: Report Advanced Dockable Windows , Report Advanced Toolbar , Report Data Visualizations , and Report Styles and Themes .
Administrators can now set tenant-specific custom attribute values on accounts that belong to multiple tenants.
The search box in the Views, Data, and Business pages accessed from the main menu now provides results from all subfolders in the current project for the selected file type. Hover over a result's name to see its full location in a tooltip.



Description
Expand All content in Logi Symphony to quickly return to previous files you had open including dashboards, reports, metric sets, data cubes, and more.
The message shown on Views, Data and Business pages when the selected folder on the left is empty has been improved.
The description and validation for the Gateway Hub URL configuration setting have been improved.
Tenant administrators can now manage custom attribute values for an account for the current tenant if the account also belongs to another tenant.
Manual Select transforms have a new option Element Discovery Execution Behavior to more quickly discover the elements returned by more complicated queries or larger results.
Log entries for containers running separate Python, export, and/or other microservices now contain the date in their timestamps.

Known Issues

Affected Releases	Description
Symphony 24.1 and later	None.



- Archive of documentation for Logi Symphony v24

Symphony 24.1 Enhancements

This topic provides details about the enhancements in Composer 24.1.

To purchase this product, contact [insightsoftware Sales](#).

- [Logi AI](#)
- [Managed Dashboard Data Connections](#)
- [Logi Symphony Software As A Service](#)
- [Logi Symphony For Visual Data Discovery](#)
- [Groups Management](#)
- [Enhanced Filter Security Capabilities](#)
- [Content Migration Flow Improvements and Breaking Changes Management Expansion](#)
- [Lite Dashboard for Self-Service Environments](#)
- [Suppress Time Zone Labels](#)
- [Self Service Reporting Improvements](#)
- [Multi-Tenancy Improvements](#)
- [Embed Data Discovery Components in Managed Dashboards](#)
- [Data Cube Discovery Enhancements](#)

Logi AI

Logi Symphony introduces Logi AI, a comprehensive AI and Natural Language Generation (NLG) module designed to transform the way you analyze your data.



Logi AI is a flexible AI platform that enables you to build and embed your own AI-powered chatbots directly into dashboards and visualizations in partnership with [Flowise](#). See [Add Chatbots to Dashboards](#) and [Use and Embed Chatbots In Your Application](#).

Embedded chatbots help you elevate the user experience, making complex data analytics intuitive and effective for informed data-driven decisions.

Adjust chatflows based on your use cases, domain policies, and security policies to ensure actionable insights are easily accessible and perfectly aligned with your strategic goals. Backup your chatflows manually.



Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.

Four starter templates are available from insightsoftware in the Flowise market place:

- **Logi Symphony QnA:** Run a live QnA using in-memory vector storage to query data per session or per question.
- **Logi Symphony Query Engine:** Use the LlamaIndex Query Engine to query your data directly after you've upserted it. Use on one data set at a time.
- **Logi Symphony Local:** Run a live QnA locally, similar to Logi Symphony QnA. This runs locally, allowing for air-gapped query and response.
- **Logi Symphony Prompt Chaining:** Build a flow of custom prompts to pull the appropriate data from Symphony, create context, and return more accurate answers.

When appropriately licensed and enabled, Logi AI is included as a tile on the home page when you first log in to Symphony as system administrator. Select **Open** to open the Chatflow work area. In this work area you can:

- Access your existing workflows by scrolling through them as tiles or a list.
- Search among chatflows to find specific chatflows by name or category.
- Select **Add New** to add a new chatflow to your library.
- Expand the main menu to select navigation options unique to this work area. Return **Home** to the Symphony home page, open the **Chatflows** work area, and access connected **Marketplaces**. You can open the **Tools** work area, access your **Assistants**, add **Credentials** to reference in your chatflows, define **Variables** for use in the Custom Tool Function, store and track use of **API Keys**, or access the Settings work area for more information about your current version.

For more information, see [Logi AI](#), [Getting Started With Logi AI](#), and [Logi AI Solutions](#).



Managed Dashboard Data Connections

You can now create data sources in Visual Data Discovery data cubes or data connectors. Establish a connection to an available project in Visual Data Discovery then use to create a data source. After you've created the source, use it to create a visual in the Visual Gallery or in a dashboard.

See [Add Data Store Connections](#) and [Define a Visual Data Source](#).



Important: This feature is considered to be released in beta for your testing purposes. Workflows and features may change before a production-ready version is released.

Logi Symphony Software As A Service

Logi Symphony is now available as a fully-hosted Software as a Service (SaaS) solution. This managed implementation allows you and your users to leverage the extensive capabilities of Symphony without the back-end upkeep of managing security, upgrades, and features.

Designed to scale for your needs and provide a seamless onboarding experience, use Symphony directly, or as embedded components in your own environment.

Contact your sales team to get started!

For more information, see [Logi Symphony - Software as a Service \(SaaS\)](#) and [Logi Symphony SaaS Solutions](#).

Logi Symphony For Visual Data Discovery

You can now deploy and use only the Visual Data Discovery module in Symphony. Use the capabilities of this module as an entire deployment, installed directly or hosted as an SaaS with insightsoftware.

Users can use Symphony directly, access their data in an embedded environment, and belong to one or more tenants as needed.

See [Install Symphony - Kubernetes](#).

Groups Management

Groups management is now a streamlined experience in Symphony. Create groups in the Symphony interface, and make privilege changes to groups in each module as needed. You can also add users to multiple groups at user creation time.

When you create, edit, and update groups, the changes are shared across all of your licensed modules in your environment, and within applicable tenants.

System Administrators can manage all groups and users in groups. View all groups across all tenants by selecting **Groups** from the main menu: searchable tags for each group tell you which tenant is associated with each group.

Tenant Admins can manage users and groups associated with the tenants they administer. View all groups in a tenant by selecting **Groups** from the main menu while you're working in that tenant. Switch between tenants as needed to view that tenant's groups.

If you're a member of multiple tenant groups that use Visual Data Discovery, you can switch between tenants to see a list of the groups for each tenant.

For more information, see [Symphony User Groups](#) and [Create And Edit Symphony Groups](#).

Enhanced Filter Security Capabilities

We've expanded the filter capabilities to present data more securely to your users. Filter values can be shown in masked format if you want to filter based on confidential data.

- To enable, disable **Filtering** for fields in a data source for one or more data columns on the **Fields** tab of that data source.
- Next, set the Value and Display fields in your filter snippets based on your needs.
- When you view tool tips or hover over fields that have Filtering disabled, you won't see the actual values. Instead, you'll see a generic reference, such as a count of "filter values" or a series of asterisks `*****`.



Important: Applied filter values that later have **Filtering** disabled to not automatically mask or hide those fields. You must recreate the filter that uses these values.

You can now set and apply filters to filter snippets. Select a source to apply the filter in the filter snippet.

See [Filter Data With Masked Fields](#).

This means:

- Filtered data columns can't be added to new visuals.
- When you add a new filter snippet, you can't use those columns as a **Value Column** users can see.
 - If you enable **Use Value Column as Display Column**, the column is hidden and can't be selected.
 - If you disable **Use Value Column as Display Column**, the column is visible and the data can be included in the filter snippet, masked. Select a different value for the **Display Column**, as the original column name can't be selected.
- Use a filtered column to connect widgets in the filter snippet. When you use the filter snippet to filter visuals by that filtered column and values, the tool tips only show that the data is filtered by a filter value, not the actual data used from the filtered column.
- When you or your users export visual data that includes information from a filtered column, the information is not included in plain text.



Secure fields by data columns to secure filtering and mask data and exported data

1. Navigate to the Fields tab of your data source, then select **Bulk Field Capabilities**. The Bulk Field Capabilities work area opens.
2. Find your fields by scrolling, searching, or filtering.
3. Select the toggle in the **Filtering** column to disable (slide left) each field as needed.
4. When you have completed your changes, select **Save**.
5. Your changes are applied, in bulk, to this data source.

For example, you want to disable county name information for a data source that includes state-wide data, but still allow the information to be used securely by your users.

- Disable the **County Name** Filtering column on the Fields tab of your data source.
- Create a filter snippet in your dashboard that uses **County Name** to filter data, but use a different data column, such as **Internal County Code**, as the Display Column for your filter snippet.
- When users view or interact with visuals affected by the filter snippet that includes the **County Name**, they see only that the data has been filtered by filter values, and not by specific county names or county codes.
- The same generic information is provided in the auto-generated visual description, and when the visual data is exported.

Additionally, you can now disable:

- User access to filter snippets.
- User access to add filters to a filter snippet if you do allow the user of filter snippets.



Note: Work with technical support to disable these in your environment. If you disable these settings, the change affects all tenants within your environment.



Content Migration Flow Improvements and Breaking Changes Management Expansion

- When you import dashboards, visuals, and sources, Content Distributor group members and other users with appropriate privileges can enable **Share Default Access With All Users**. When enabled, in the UI or as an API option, users in the tenants you selected for import can access to these resources immediately based on default access levels.
- You can now import and export visuals directly in the Visual Gallery user interface and via API. Import and export one or more visuals in bulk. Import and export includes any supporting object the visuals are dependent on, such as data sources and connections.

Import Visuals

Import File

Browse

Tenants

Visual Data Discovery

Ignore Warnings

Tags

test import

sales UAT

Share Default Access With All Users

Visuals (2)

Insertion Strategy

Always create objects

See Items

Sources (2)

Insertion Strategy

Reuse existing objects

See Items

Connections (1)

Insertion Strategy

Reuse existing objects

See Items

Cancel

Import

Page 94 of 112



- When you select **Ignore Warnings** during import, a Tags field is added to the Import work area. Add or create tags to apply to objects that do not import cleanly.
 - If errors occur during import, Symphony adds the tags you select to the affected objects.
 - Use these tags to find the dashboards, visuals, filter snippets, or sources you need to fix.

For more information, see [Import Dashboards](#), [Import A Data Discovery Dashboards](#), [Import Visual Gallery Visuals](#), and [Import or Export Sources](#).

Lite Dashboard for Self-Service Environments

We've added a simplified lite dashboard to your Symphony environment for Data Discovery content. You can now embed a lite dashboard complete with its own interactivity settings, designed to get your users up and running quickly and easily.

Users can create dashboards with the default visual format as a table visual. Once created, users can:

- Edit the visual's fields and settings, and optionally change the visual type to an available visual type.
- Select an available visual type if the data source doesn't support a table visual, then edit the visual as needed.

Available visual types include: Table (default), Bars, Bars:Multiple Metrics, Donut, KPI, Packed Bubbles, Pie. Customize this list further in your embed code as needed to add or remove other visual types.

Sample embed code:

```
embedManager.createComponent('lite-dashboard',
  const componentConfig = {
    "dashboardId": "<dashboard-ID>",
    "componentInstanceId": "<component-instance-ID>",
    "type": "lite-dashboard",
    "application": {
      "banner": false,
      "logo": true
    },
    "interactivityProfileName": "lite",
    "theme": "modern",
    "editor": {
      "placement": "docRight"
    },
    "header": {
      "title": "My Lite Dash"
```



```
        "showActions": false,  
        "showTitle": false,  
        "visible": false  
    },  
    "availableVisTypes" : [ `HISTOGRAM`, `BOX_PLOT`, `HEATMAP` ]  
}  
);
```

Suppress Time Zone Labels

You can now opt to suppress time zone labels in the SymphonyData Discovery user interface.

After upgrading to this version, you can [update the Data Details](#) of your time fields in a data source and suppress the labels. Select **Not Specified** instead of a time zone to hide time zone information in the user interface and when users export data.

Suppress time zone labels in your environment

1. Navigate to the Fields tab of your Visual data discovery data source and select the field with the Time data type you want to modify.
2. In the **Data Details** section of the settings sidebar menu, select **Not Specified** from the Time Zone drop down selector.
3. Repeat for any other time fields you'd like to suppress the time zone label for.
4. When you have completed your changes, select **Save**.

Your changes are applied to this data source. The next time visuals or dashboards that use these updated fields are opened, the time zone information is suppressed and information is displayed in the users' local time zone. Time zones are also suppressed in all exports that use this data source.

Self Service Reporting Improvements

Report editing features in the Managed Reports module are now controlled by a set of Application Privileges. Enable or disable (allow or deny) as needed for users and groups to give you the flexibility to offer your users a simplified report editing experience.

Select a user or group to edit, then select **Application Privileges** from the **details** work area to adjust these options. All of these new application privileges default to **Allow (inherited)** until you adjust them for your users' needs.

- **Report Advanced Dockable Windows:** Change to **Deny** to remove access to more advanced windows docked to the sides of the report editor. Set to **Allow** or **Allow (inherited)** to make these available to users.



- Archive of documentation for Logi Symphony v24

- **Report Advanced Toolbar Options:** Change to **Deny** to remove access to more advanced toolbar options in the report editor. Set to **Allow** or **Allow (inherited)** to make these available to users.
- **Report Data Visualizations:** Change to **Deny** to prevent users from changing a visualization type while they are editing a report. Set to **Allow** or **Allow (inherited)** to make these available to users.
- **Report Styles & Themes:** Change to **Deny** to remove access to the theme and style creation in the report editor. Users can still change the styling of individual items in a report by adjusting an item's properties directly. Set to **Allow** or **Allow (inherited)** to make these available to users.

Multi-Tenancy Improvements

We've expanded and improved multi-tenancy in Symphony to make it easier to manage tenants, add users to multiple tenants, work with tenant and user content, and for users to navigate between tenants if they belong to multiple tenants.

- Add new users to multiple tenants at account creation time.

Create user

User name *

s.linda

Full name *

Linda Stone

Email *

s.linda@example.com

Password *

.....

☐ Global User

☐ Make user an admin

Tenants *

☐ Sales Team
 ☐ Joint Ventures

- Easily create and edit users, changing their tenant status, admin or system admin status. Make them a member of the **Global User** group, or **VDD Content Distributor** group.

×

Edit user

User name *

s.linda

Full name *

Linda Stone

Email *

s.linda@example.com

Password

.....

☒

Global User

☐

User is an admin

 Global User

☒

VDD Content Distributor

Cancel

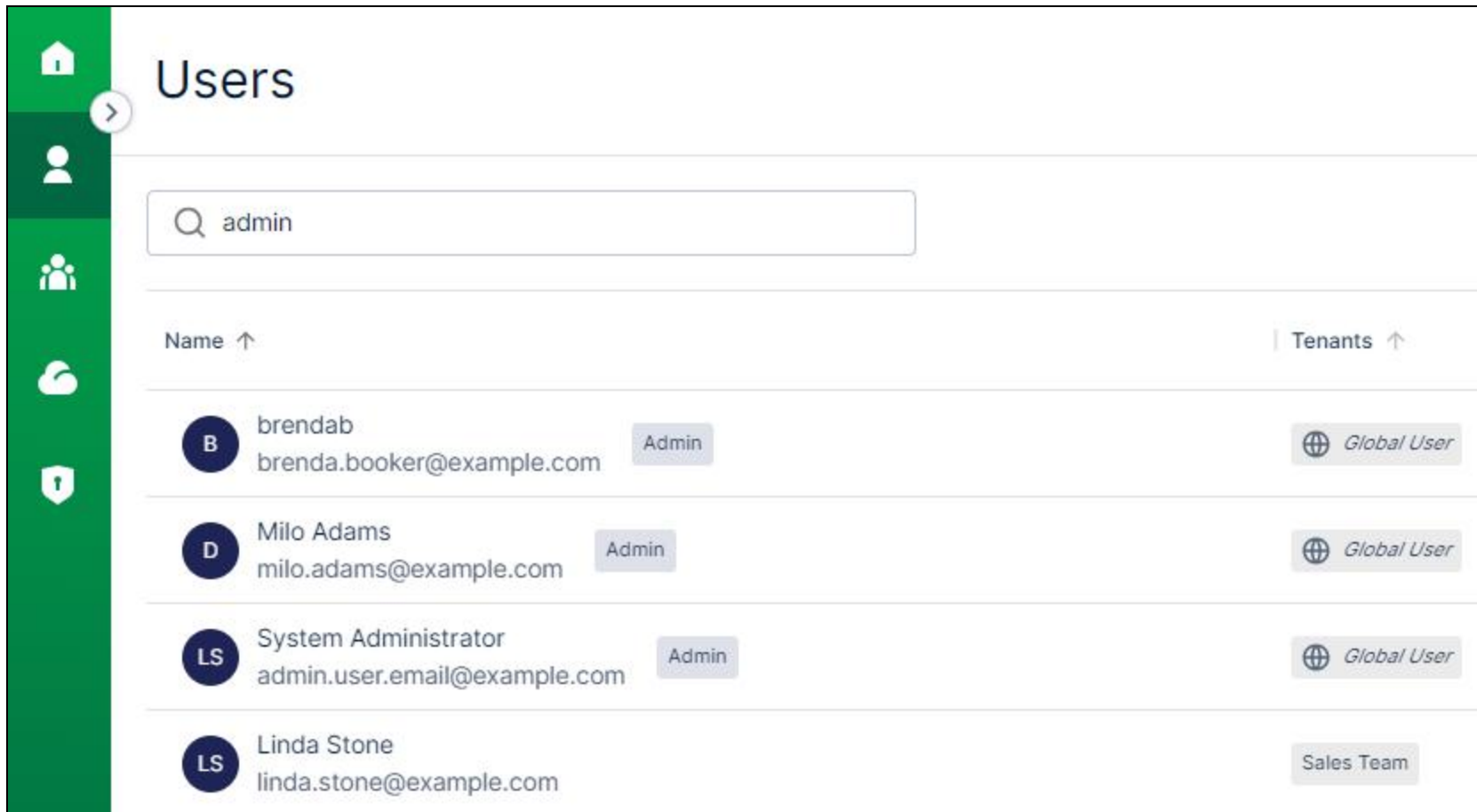
Update user

⋮

- Add or remove users to and from multiple tenants.
- Quickly make a user a tenant admin with the **Make user an admin** toggle, which adds them to the appropriate tenant administrators groups.
- Quickly add a user to the administrator group of a tenant to make them a tenant admin.
- Add a tenant admin user to another tenant: the user becomes a tenant admin for the new tenants they are added to.
- Use the **Global User** toggle to include users as global users without removing them from their tenants. (Tenant admins are promoted to system admins).



- Add a user to the Content Distributors group. As a member of that group, they can more easily share content across your environment as needed. All system admins are content distributors by default, regardless of the toggle.
- Switch easily between tenants, and verify what tenant you are working in:
 - **Main Symphony Menu:** Select **My Tenants** from the main Symphony menu to view or switch between tenants.
 - **Managed Dashboards and Reports module:** Select your profile from the main menu, then the tenants option from the profile menu to view your current tenant.
 - **Visual Data Discovery module:** Select the tenants option from the main menu to view your current tenant.
 - The tenant you are working in is always at the top of your tenant list, with a check mark indicating it is the active tenant.
- The minimum length for a tenant name has been removed. Symphony only verifies that the tenant name is not empty.
- System admins are listed with an **Admin** tag in the Name column on the main **Users** landing page. Only Global Users can be system admins, and show a **Global User** tag in the Tenants column. Search for all admins by entering **Admin** in the search box.



Name ↑	Tenants ↑
B brendab brenda.booker@example.com Admin	Global User
D Milo Adams milo.adams@example.com Admin	Global User
LS System Administrator admin.user.email@example.com Admin	Global User
LS Linda Stone linda.stone@example.com	Sales Team

- Sources created in the Visual data discovery module are visible only in a tenant where it is created, and optionally to other tenants as assigned.

For more information, see [Multi-Tenancy in Symphony](#) and [Add New Users](#) .

Embed Data Discovery Components in Managed Dashboards

Present a comprehensive view of the information in your environment in one place, utilizing the full capabilities of Symphony. You can now include any data discovery object in your managed dashboards to bring all of your data into Symphony.

Add existing dashboards or visuals as components to a managed dashboard, and edit the properties as you would for any component: adjust the main properties, the look, and the layout.



You can additionally add a component by selecting the **(new)** option instead of existing content. This lets users to work with available data to create a visual or dashboard in a managed dashboard and see data in a different context.

Select different interactivity settings for dashboard components as needed.

Embed a new or existing component

1. Edit a managed dashboard and select **Components** from the Add / Edit toolbar.
2. Select **Data Discovery** from the Content section of the expanded toolbar.
3. The component is added to your dashboard: adjust fields in the Common section of the Properties panel to define the dashboard basics.
 - i. **Name:** Select a name for this component, or leave the name Symphony added.
 - ii. **Content Type:** Select **Dashboard**, **Lite Dashboard**, or **Visual**.
 - iii. **Content:** Select **(new)** to embed a new component, or the name of an existing dashboard or visual from your library or visual gallery.
 - iv. **Interactivity Profile** (dashboards only): Select **Interactive**, change to **Read-Only** to prevent users from interacting with the dashboard, or set to **Lite Dashboard** to present a simplified dashboard users can interact with.
4. As needed, adjust the Header information on the Main Properties panel, or the Look and Layout as you would with any other item in a managed dashboard.
5. Optionally, switch to **View** mode to edit the content of your dashboard or visual.
6. When you've completed your changes, **Check In** your changes to share with others.

Data Cube Discovery Enhancements

When you create or edit a data cube using a manual select transform, you can now set a temporary limit for discovering data as you build and test. This temporary limit allows you to build and test your data cube, and still run it against the full data set when complete.

Adjust the configuration of a manual select transform: update the **Element Discovery Execution Behavior** to suit your data source. Options include **Default**, **Top1/Limit 1**, and **Single Row**. from the options listed in **Element Discovery Execution Behavior**. Select an option appropriate to your data source to return one line of data as you build your workflow.



Note: Oracle managed data sources use ROWNUM = 1 or FETCH FIRST 1 ROWS ONLY behavior.



Define the element discovery execution behavior for a manual select transform

1. Select a Manual Transform in your data cube to adjust. The Contextual menu is added to the toolbar.
2. Select **Configure** to open configuration options for the transform.
3. In the Element Discovery Execution Behavior drop down, change the behavior from **Default** to **Top 1/Limit 1** or **Single Row**, as appropriate for your data source.
4. Select Close to close the configuration options for the transform.
5. The transform will retrieve data, temporarily, based on these settings.



Symphony Release Vehicles and Third Party End of Life Policy

Important Notice

Symphony is offered on a quarterly release schedule, and our version numbering system reflects this. The current major release of Symphony is v24.4.

For information about Symphony's end-of-life policy for third-party software, see [Third Party End of Life Policy](#).

Current Releases

Each quarterly release is supported using service packs to address any issues until the next quarterly release is available. Subsequent fixes for a non-current quarterly release are limited to the most severe issues for the next three quarters. Upgrade to the most current quarterly release for the most up to date support and features.

Release	Support Cycle
Q1 Release	▪ Service packs for all issues throughout Q2 ▪ Service packs for severe issues only throughout Q3 and Q4 ▪ End of life for Q1 release at next Q1 release
Q2 Release	▪ Service packs for all issues throughout Q3 ▪ Service packs for severe issues only throughout Q4 and Q1 ▪ End of life for Q2 release at next Q2 release
Q3 Release	▪ Service packs for all issues throughout Q4 ▪ Service packs for severe issues only throughout Q1 and Q2 ▪ End of life for Q3 release at next Q3 release
Q4 Release	▪ Service packs for all issues throughout Q1



Release	Support Cycle
	▪ Service packs for severe issues only throughout Q2 and Q3 ▪ End of life for Q4 release at next Q4 release

See [Request and Apply a New License Key](#) to obtain a license appropriate for your release of choice from our support team.

Third Party End of Life Policy

As third-party software (such as operating system, database engine, and cluster environment software) ages, it becomes increasingly difficult for insightsoftware to provide the support and level of functionality that our customers expect. To ease this difficulty, insightsoftware has established the following end-of-life (EOL) policy for third-party software. An EOL policy describes when Symphony will cease to provide support for a version of third-party software.

The third-party software vendor sets the EOL for its software versions. This is the period of time during which the vendor provides patches, fixes, and other updates for a given software version. When a vendor no longer provides updates and patches or declares an EOL for their software, insightsoftware will remove support for that third-party software version.

When a third-party software version reaches EOL, it continues to function normally. Existing Symphony installations using that third-party software version will also continue to function normally. However, you will be unable to perform:

- **Fresh installations of Symphony** – Symphony prevents new installations after the third-party software reaches EOL.
- **Upgrades to new versions of Symphony** – Symphony prevents upgrades after the third-party software reaches EOL.
- **Third-party-specific fixes** – Symphony does not provide fixes, security or otherwise, after the third-party software reaches EOL.

If your third-party software has reached, or will soon reach, its EOL date, Symphony recommends that you schedule an appropriate time to upgrade both the Symphony and the third-party software to their latest versions. Contact insightsoftware [Technical Support](#) if you need more information.



CLI Support Table

The following table lists the version of the CLI supported by different versions Symphony.

CLI Version	Supported Versions
1	Symphony 23.3 and later. (<code>composer-chart-cli</code>)

You can get additional information about the CLI at <https://www.npmjs.com/package/composer-chart-cli> and in [A Custom Chart Tutorial](#).



Deprecated Features

The following deprecated features will be removed in a future release. Features are organized by the version in which they were deprecated.

Symphony v24.4

Symphony

Title	Description
24.4.1 Deprecated Features	
None.	
24.4 Deprecated Features	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Deprecated Features	
None.	
24.4.2 Deprecated Features	
None.	
24.4.1 Deprecated Features	
None.	
24.4 Deprecated Features	
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
24.4.1002 Deprecated Features	
None.	
24.4.1001 Deprecated Features	
None.	



Title	Description
24.4 Deprecated Features	
Decrypt and Encrypt dbi.config	The way the dbi.config file is encrypted and decrypted has changed: the <code>connectionConfig dt</code> command is deprecated and replaced with <code>configFile</code> , which will encrypt only individual connection configuration values rather than the entire section.

Symphony v24.3

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
None.	

Symphony v24.2

Symphony

Title	Description
None.	



Visual Data Discovery Module

Title	Description
User Interface Naming Conventions	▪ The term Zoom has been replaced by the use of Drill-down. ▪ The name Visual Style has been replaced by the use of the term Re-visualize.

Managed Dashboards and Managed Reports Modules

Title	Description
None.	

Symphony v24.1

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
None.	



Removed Features

The following features have been removed from Symphony. These features were deprecated in a previous release. Features are organized by the version in which they were removed.

Symphony v24.4

Symphony

Title	Description
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Visual Data Discovery Module

Title	Description
24.4.3 Removed Features	
None.	
24.4.2 Removed Features	
None.	
24.4.1 Removed Features	
None.	
24.4 Removed Features	
None.	

Managed Dashboards and Managed Reports Modules

Title	Description
24.4.1002 Removed Features	
None.	



Title	Description
24.4.1001 Removed Features	
None.	
24.4 Removed Features	
POST /File/Copy and POST /Project/Duplicate	The return values of the following REST and JavaScript API methods have changed: POST /File/Copy/ returns a CopyResultData and copyEntry a CopyResult , and POST /Project/Duplicate/ returns a DuplicateProjectResultData and duplicateProject a DuplicateProjectResult .

Symphony v24.3

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Symphony v24.2

Symphony

Title	Description
None.	



Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		

Symphony v24.1

Symphony

Title	Description
None.	

Visual Data Discovery Module

Title	Description
None.	

Managed Dashboards and Managed Reports Modules

Title	Description	Alternative
None.		