

Release notes v5.7.1

Important! Create a backup copy of your projects and connector repositories before updating to the new version. Projects saved in the new version can't be opened in versions earlier than **5.6**. Also, if your organization uses EasyMorph Server, please make sure that the Server is upgraded to the new version before Desktops.

A few words from the creators of EasyMorph

This is a minor release with security improvements and cumulative bugfixes. Note that the changes can be breaking if your EasyMorph Server uses a self-signed SSL certificate or one of your data connectors connects to a server with a self-signed or expired SSL certificate. In this case, you will need to configure SSL exceptions settings also added in this release.

What's new

Whitelist of excepted SSL certificates

In this release, we've added global settings in Desktop and Server to allow self-signed or expired SSL certificates only if their thumbprints are white-listed in application preferences (Desktop) or settings (Server).

These settings affect **all data connectors** used by the respective application. We highly recommend configuring this option and, if necessary, explicitly permitting excepted SSL certificates by listing their thumbprints.

Note that when Desktop is linked to EasyMorph Server, its SSL exceptions are provided by the Server, not by application preferences in EasyMorph Desktop.

Also, the Server Link configuration in Desktop now always prohibits a self-signed or expired SSL certificate of EasyMorph Server, unless its thumbprint is explicitly permitted in the Server Link settings.

Miscellaneous

- Tableau connectors that use PAT now can be used in parallel in workflows
- Desktops can now execute projects with invalid digital signature if they are connected to EasyMorph Server
- The "Find action" dialog now allows finding actions with any annotation

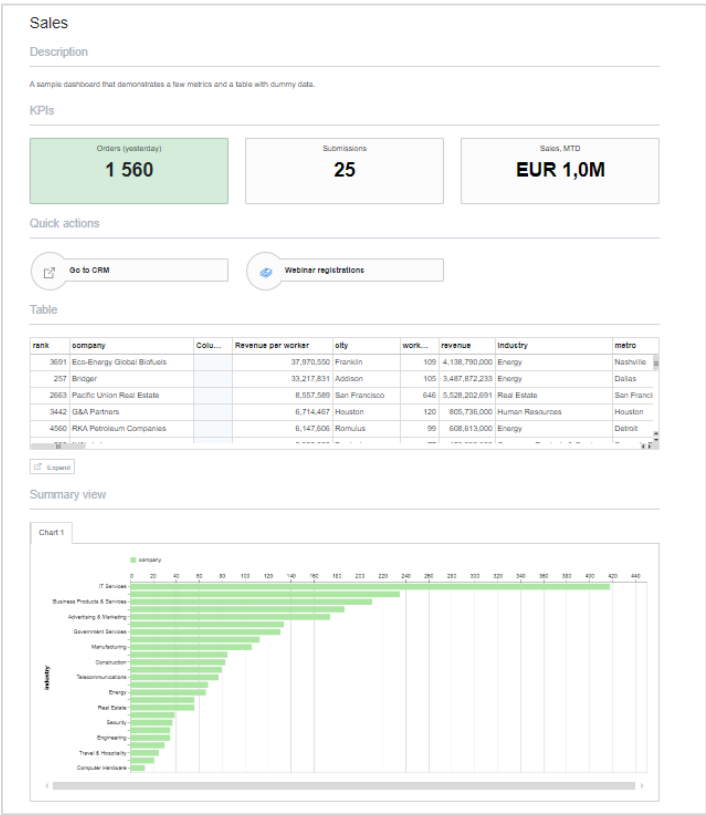
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A few words from the creators of EasyMorph

With this release, we continue transforming (or, if you wish, *morphing*) EasyMorph into a multi-purpose automation platform that brings data processing and collaboration in your organization to a new level. Version 5.7 introduces *Server boards* – a new versatile feature that can be used in various ways:

- Unify in one view your important business information, no matter where it's stored
- Deliver workflow computation results (datasets, files) to employees in your organization
- Explore and analyze tabular data in your business applications and databases
- Collect and track business and technical metrics
- Build simple dashboards
- Trigger automation workflows



Screenshot 1: A board in EasyMorph.

In the next major version (5.8), boards in EasyMorph will be able to operate with *issues* – a major work management and automation capability that will enable a whole range of new and exciting use cases for EasyMorph, such as approval workflows, process automation, incident management, and many more.

Boards will also serve as starting points for [data exploration](#), where it will be possible to navigate from one dataset to another just like you browse the internet and navigate from one web page to another.

Boards and the Catalog now form *Explorer*, a new feature that encompasses and [supersedes the Catalog](#). Unlike the Catalog, which is Server-based, a simplified version of Explorer (without boards and the Catalog) is available in Desktop-only deployments of EasyMorph. In the simplified version, you can view .dset files (already available in v5.7) as well as computed results of .morph projects (coming in v5.7.1). In v5.8 it will be possible in Desktop-only deployments to navigate from one dataset to another using hyperlinks between datasets, the key feature of Explorer.

Besides boards and Explorer, other notable improvements in this release include:

- Email automation – now you can mark emails read/unread, move to folders, and delete them
- Integration with Jira – importing and creating Jira issues as well as updating their statuses
- [Teams Bot](#) for sending messages to channels in Microsoft Teams
- Import from Apache Parquet

What's new

Boards

Boards is a new collaboration and data exploration feature of EasyMorph Server, part of Explorer. Boards are available in Desktops (including the free edition) and the Server. Desktops must be connected (linked) to EasyMorph Server to view and create boards.

Boards are composed from *sections*, stacked vertically. A board can have any combination of sections of any types. The following section types are available as of this release (more section types will be added in future releases):

- Metrics
- Tables
- Charts (simple)
- Asset shortcuts
- Text

In most cases, sections are configured from Catalog assets such as metrics, or datasets. Although, in some cases, sections can link directly to external web-pages as well as .dset files stored on Server.

Sales

Description

A sample dashboard that demonstrates a few metrics and a table with dummy data.

KPIs

Orders (yesterday)
1 560

Submissions
25

Sales, MTD
EUR 1,0M

Table

rank	company	Colu...	Revenue per worker	city	work...	revenue	industry	metro
3691	Eco-Energy Global Biofuels		37,970,550	Franklin	109	4,138,790,000	Energy	Nashville
257	Bridger		33,217,831	Addison	105	3,487,872,233	Energy	Dallas
2663	Pacific Union Real Estate		8,557,589	San Francisco	646	5,528,202,691	Real Estate	San Francis
3442	G&A Partners		6,714,467	Houston	120	805,736,000	Human Resources	Houston
4560	RKA Petroleum Companies		6,147,606	Romulus	99	608,613,000	Energy	Detroit
290	It Works!		5,925,922	Bradenton	77	456,296,000	Consumer Products & Services	Sarasota-B

Expand

Screenshot 2: A board with three sections as seen in EasyMorph Server's web UI.

New connectors

The **Jira** connector is required for retrieving data from Jira and managing Jira issues from EasyMorph workflows.

The **Teams Bot** connector is required for the "Teams Bot" action in order to send notifications to channels in Microsoft Teams.

New actions



The **Email command** action performs various operations with email messages:

- Mark read/unread
- Move to folder
- Delete
- Delete permanently



The **Import from Apache Parquet** action allows importing binary data files in the Apache Parquet format (.parquet).



The **Import from Jira** action imports data from Jira:

- List of projects
- List of issues
- List of issue types
- List of issue statuses



The **Jira command** action performs various operations with issues in Jira:

- Create issue
- Change issue status
- Delete issue



The **Teams Bot** action sends notifications to channels in Microsoft Teams. Note that the action can't send messages into private chats, only to channels. Messages can be either plain text, or [Adaptive Cards](#). In the latter case, messages can be richly formatted and contain hyperlinks, images, buttons, bulleted lists and many more. [Read more](#)

Changes in existing actions

The **Calculate new column(s)** action now has an option for calculating new columns only when they don't already exist in the input dataset.

The actions **Web request** and **Import from Web API** now permit using a first column value for specifying URL parameters.

The **SharePoint command** action has got a new command – "List libraries".

What's new in Desktop

Explorer

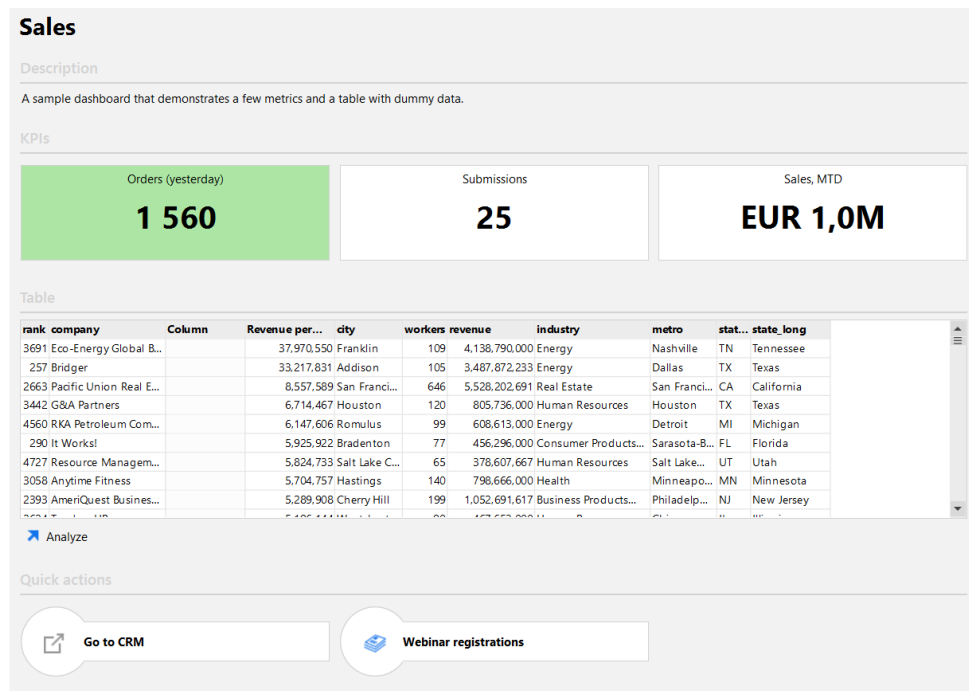
The Catalog app is renamed to Explorer. In Explorer, you can:

- View and analyze datasets (.dset files) – local and Server-hosted
- **[postponed to v5.7.1]** View and analyze computed datasets (results of .morph projects) – local and Server-hosted
- Browse the Catalog (when connected to Server), create and retrieve Catalog assets
- View and design boards

As you can see in the list above, some of the Explorer functionality is still available without EasyMorph Server. In v5.8, we will be adding in Explorer the ability to navigate from one dataset to another (computed) dataset by hyperlinks between datasets (aka commands). [Read more about Explorer](#)

Boards (requires EasyMorph Server)

When your Desktop is connected to EasyMorph Server, you can create, view, and edit *boards*.



Screenshot 3: A board in EasyMorph Desktop.

Miscellaneous

- When an action is selected in a table, you can now press F1 to go to the web-help article on that action
- The Analysis View has got the "Send to sandbox" action. It sends the currently selected subset of rows into a new or existing sandbox in the current workflow
- The free edition now doesn't permit saving projects with more than 20 actions – the limit of the free edition
- The free edition now doesn't permit opening projects that were modified outside of EasyMorph

What's new in EasyMorph Server

Explorer

The Catalog tab is renamed to Explorer. In the Explorer tab, you can:

- View and create boards
- View and create Catalog assets (metrics, computed datasets, and web links, more to follow)

- View results of computations (computed datasets) and static datasets from the Catalog

Explorer is available in one space (the Default space, by default) in the Team and Enterprise editions of EasyMorph Server. It is available in all spaces when your Server license includes the Explorer Add-on (previously known as the Catalog Add-on).

Boards

In the Explorer tab, you can view and create boards explained in the "What's new" section above.

Analysis View

Analysis View has long been available in EasyMorph Desktop. In this release, we're making Analysis View available in the Server's web UI as well. In this initial release, Analysis View only allows viewing datasets and sorting them.

In v5.7.1 we will be adding the ability to filter datasets. In v5.8, Analysis View will also display charts and cross-tables and will allow navigating to other datasets by clicking hyperlinks in cells.

Note that Analysis View fetches the entire dataset from the Server into the memory of the user's web-browser. This ensures instantaneous viewing and sorting (and soon, filtering) even with large datasets. However, opening big datasets make take a longer time if your network connection is slow. Note that the browser-based Analysis View currently doesn't support datasets larger than 1 GB.

rank	company	Column	Revenue per ...	city	workers	revenue	industry	metro	state...
3691	Eco-Energy Global Biofuels		37970550.458...	Franklin	109	4138790000	Energy	Nashville	TN
257	Bridger		33217830.790...	Addison	105	3487872233	Energy	Dallas	TX
2663	Pacific Union Real Estate		8557589.3049...	San Francisco	646	5528202691	Real Estate	San Francisco	CA
3442	G&A Partners		6714466.6666...	Houston	120	805736000	Human Resources	Houston	TX
4560	RKA Petroleum Companies		6147606.0606...	Romulus	99	608613000	Energy	Detroit	MI
290	It Works!		5925922.0779...	Bradenton	77	456296000	Consumer Products & ...	Sarasota-Bradenton-Venice FL	FL
4727	Resource Management		5824733.3384...	Salt Lake City	65	378607667	Human Resources	Salt Lake City	UT
3058	Anytime Fitness		5704757.1428...	Hastings	140	798666000	Health	Minneapolis	MN
2393	AmeriQuest Business Services		5289907.6231...	Cherry Hill	199	1052691617	Business Products & S...	Philadelphia	NJ
2624	Tandem HR		5196144.4444...	Westchester	90	467653000	Human Resources	Chicago	IL
1983	EnvisionRxOptions		4556087.3825...	Twinsburg	800	3644869906	Health	Akron OH	OH
4204	Flyers Energy		4395382.0155...	Auburn	450	1977921907	Energy	Truckee-Grass Valley CA	CA
3241	Carahsoft Technology		4126766.5095...	Reston	418	1724988401	Government Services	Washington DC	VA
1278	Knight Insurance Group		4040917.5423...	Los Angeles	59	238414135	Insurance	Los Angeles	CA
3395	Genesis-ATC		3979351.9958...	San Antonio	239	951065127	Telecommunications	San Antonio TX	TX
2506	BrightStar Care		3831732.6615...	Gurnee	65	249062623	Health	Chicago	IL
3533	American Global Logistics		3776113.2075...	Atlanta	53	200134000	Logistics & Transportat...	Atlanta	GA
2537	Transportation Insight		3704650.5376...	Hickory	186	689065000	Logistics & Transportat...	Hickory-Lenoir-Morganton NC	NC
4654	Advanced BioEnergy		3611746.2686...	Bloomington	67	241967000	Energy	Minneapolis	MIN
4344	ImmoxGroup		3580746.4319...	McLean	257	920251833	IT Services	Washington DC	VA

Screenshot 4: Analysis View in EasyMorph Server's UI.

Shared Memory commands in `ems-cmd`

The command-line client utility `ems-cmd` has got three more commands that make it possible for external applications and scripts to operate with values in Server's Shared Memory, the built-in key-value store. The syntax for the new commands is as follows:

- *Remember* – saves the specified value in Shared Memory

```
ems-cmd remember http://server_host:6330 -space Default -  
password your_password -key path1\path2\abc -value XYZ
```

- *Recall* – reads the value associated with the specified key and prints it into the console

```
ems-cmd recall http:// server_host:6330 -space Default -password  
your_password -key path1\path2\abc
```

- *Forget* – removes the specified key and the value associated with it

```
ems-cmd forget http://192.168.100.200:6330 -space Default -  
password your_password -key path1\path2\abc
```

This addition enables a range of new integration scenarios between EasyMorph Server and external applications. For instance:

- External applications set values of [metrics](#) in the Catalog and boards
- External applications read environment configuration parameters from the Server (e.g. API keys).
- EasyMorph Server operates as a common key-value store for multiple external applications that exchange data between each other through EasyMorph Server

Miscellaneous

- Email notifications about failed tasks can now be turned on and off in each space individually
- Now if a Server worker crashes, it restarts automatically after 120 seconds. An email notification is sent to the Server administrator

Previous release notes

Link: [Release notes for v5.6.2](#)