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Salient Dashboards[™]

Training Guide: Viewing Dashboards

Version 7.0



Limited warranty

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Table of Contents

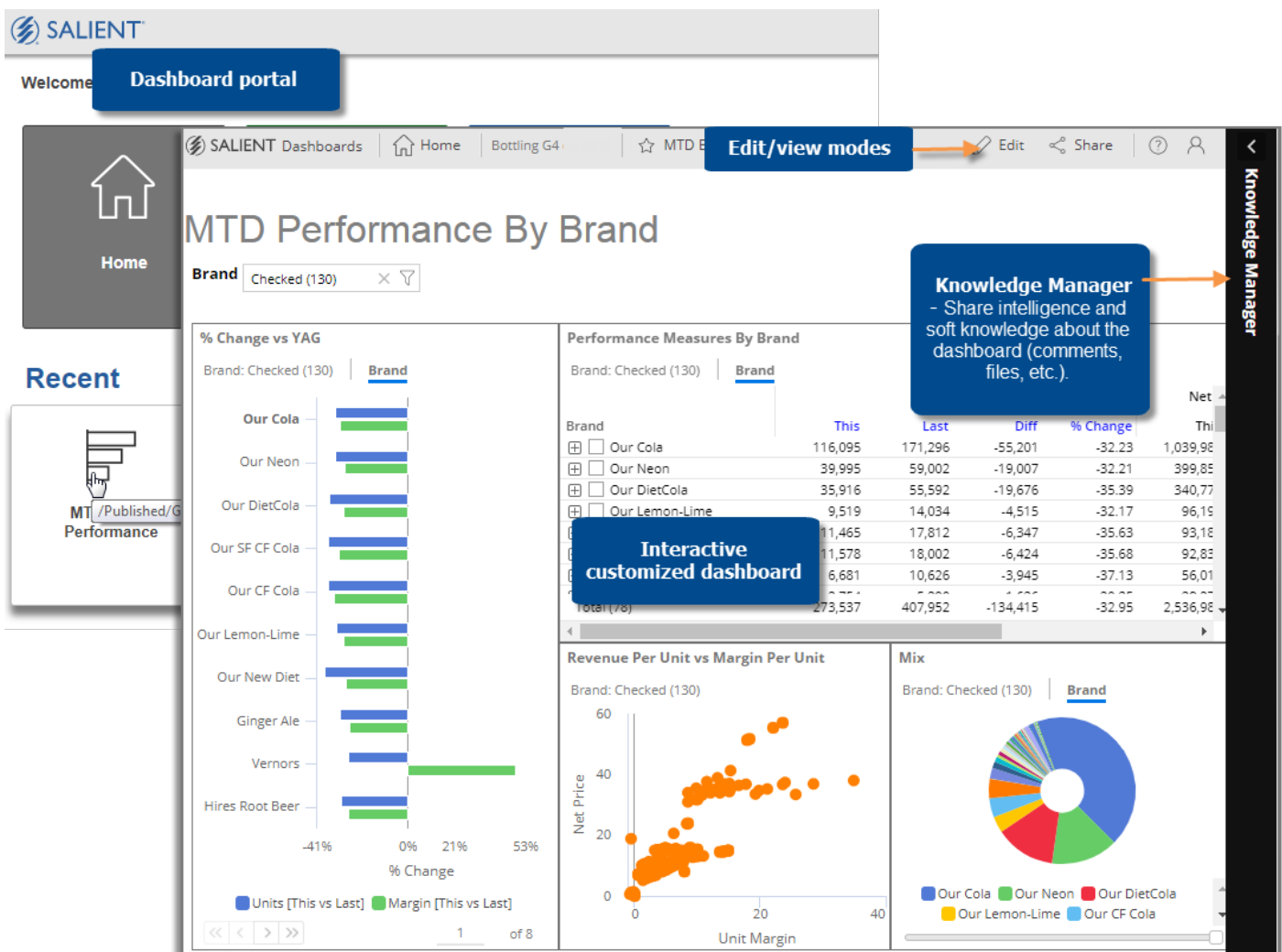
About Salient Dashboards	5
Getting Started	7
Log in	7
Dashboard portal	8
Accessing dashboards	9
The Dashboards Screen	11
Select Measures	13
Use the measure selection tool	13
Insert difference and percent change	14
Insert mix	15
Insert average	15
Move measures	16
Expand a calculated measure	16
Select the Dates	17
Date setup	18
Use a date selector	20
Group By Attributes	21
Group By and filter using the breadcrumb path	21
Expand members	24
Check members	25
Search	26
Filter	27
Interactive widget filters	28
Workspace filter widgets	30
Workspace filters (no widget)	31
Drill down (i.e., downlevel filters)	32
Custom drill-downs	34
Customize	37
Switch between grid and graph formats	37
Sort	38
Widget settings menu	38
Save and Share	39
Share a dashboard	39
Export data from a widget	40
Knowledge Manager	41

Types of Analysis Widgets 45

About Salient Dashboards

Salient Dashboards enables your team to create and access interactive, consolidated visualizations of decision support intelligence in a browser for consumption from any computer or mobile device.

Like Salient's other applications, Salient Dashboards start with UXT® technology, which transforms huge volumes of data into a highly-optimized analytical data mart. Salient Dashboards is an installation-free, browser-based client that lets users create dashboards in "edit" mode (requires rights to edit dashboards) by arranging widgets to create and publish completely customized dashboards. A variety of widget types (Comparative, Trend, Scattergram, etc.) and filtering options are available provide the exact information users need, from an overview of the entire organization down to a single fact. Users can then view the published dashboards in "view" mode. A dashboard portal (see page 8) provides easy access dashboards. In addition, a mobile application is available to provide optimized access on mobile devices.



About Power Viewer

Power Viewer is an enhanced licensing option for Salient Dashboards that provides the following capabilities in view mode:

- Select measures using the measure selection tool. (Multiple measures must be pre-configured for selection and measure changing must be enabled.)
- Use the breadcrumb path to select the By and, therefore, follow a flexible drill path. (Multiple Group Bys must be pre-configured and the breadcrumb path must be enabled for the widget.)
- Use advanced date options such fixed or moving timeframes and offset time periods. (The date icon must be enabled for the widget.)
- Access setup options for Geo, DeltaMap, and Mondrian widgets.

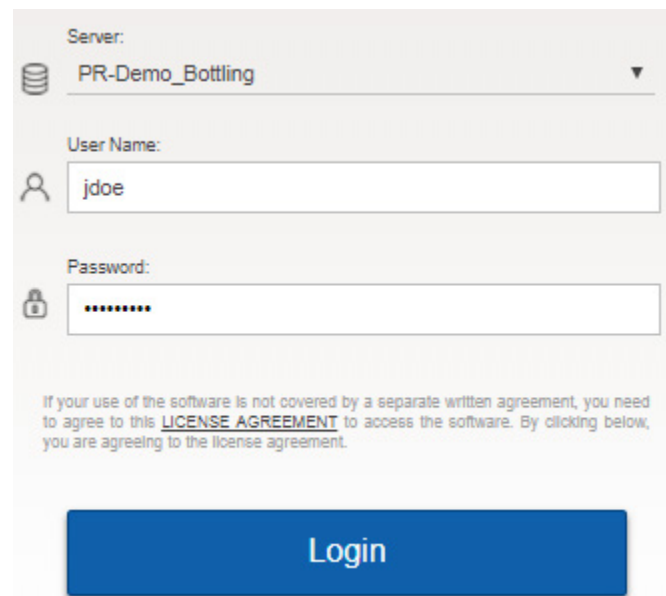
Getting Started

Log in

Before you can use Salient Dashboards, you must log in with your user ID and password. Contact your administrator if you don't know your user name and password or the login page URL.

To log in


1. In your web browser, go to the address of the Salient Dashboards login page.
2. From the **UXT Server** drop-down menu, select the name of the dataset you want to open.
3. In the **User Name** box, type your user ID.
4. In the **Password** box, type your password.
5. Click **Login**.



The login form is displayed on a light gray background. At the top, there is a 'Server:' label with a database icon and a dropdown menu showing 'PR-Demo_Bottling'. Below this is a 'User Name:' label with a person icon and a text input field containing 'jdoe'. Underneath is a 'Password:' label with a lock icon and a password input field filled with dots. A small disclaimer text is present below the password field: 'If your use of the software is not covered by a separate written agreement, you need to agree to this [LICENSE AGREEMENT](#) to access the software. By clicking below, you are agreeing to the license agreement.' At the bottom of the form is a large blue button with the text 'Login'.

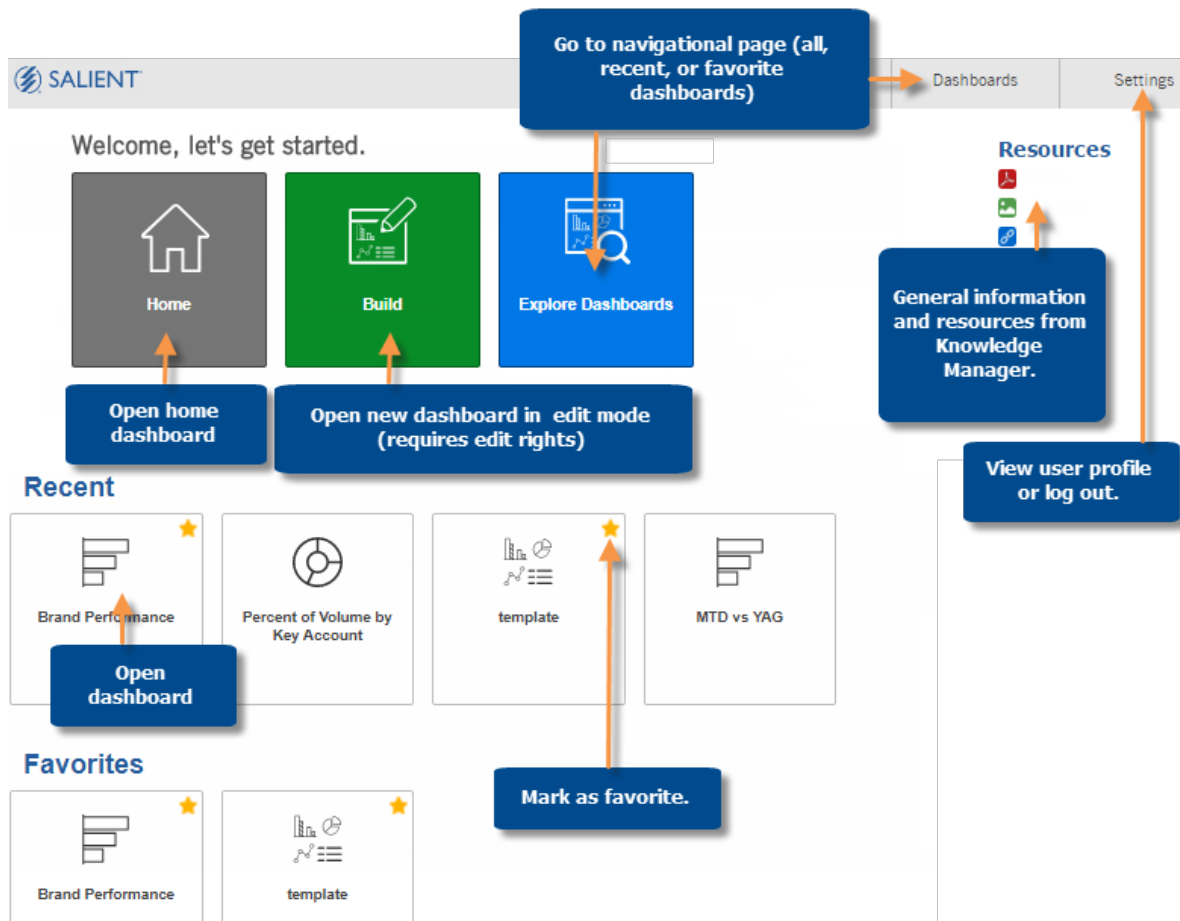
After logging in, you should see the dashboard portal or Salient Dashboards screen.

Tips:

- The dashboard portal (see page 8) opens after login unless you have entered a URL for a specific dashboard or changed the home page in user preferences. You can then go to view mode or edit mode, depending on your user rights.
- In general, Salient recommends Google Chrome™; however, other browsers are supported.
- Your server can be set up with an address that is public or private. It can also be hosted by Salient or located within your preferred infrastructure location.
- The first login is typically the slowest due to the downloading and caching of application files.
- If your organization uses an LDAP configuration (i.e., the domain stores and controls the list of users/passwords), then you must append your user ID with the @ symbol and then the domain name. For example: Username: janedoe@mycompany Password: *****
- In view or edit mode, you can log out at any time by clicking  in the upper-right corner and selecting **Logout**.
- In the portal, you can log out by clicking **Settings** in the upper-right corner and selecting **Logout**.

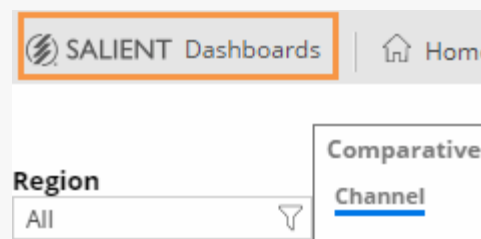
Dashboard portal

After you log in, you typically see the dashboard portal, which provides fast and easy access to published dashboards. The portal has a home page where you can access recent and favorite dashboards and a navigational page where you can access all published dashboards.



Tips:

You can go to the portal at any time by clicking **Salient Dashboards** in the upper-left corner of view mode.

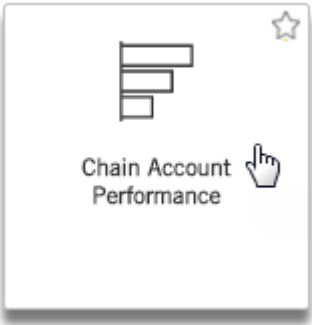
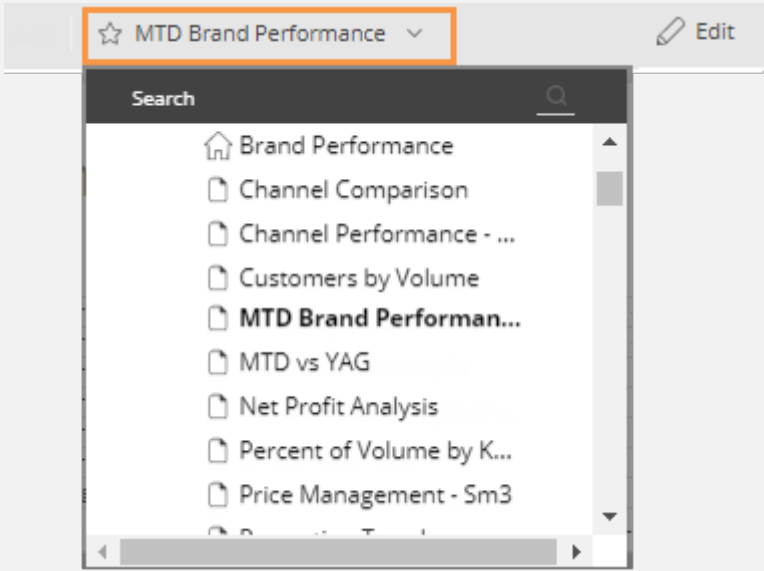
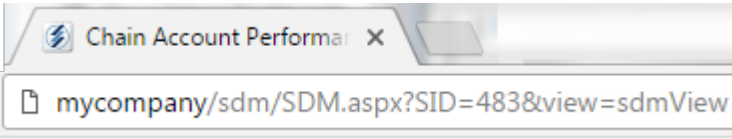


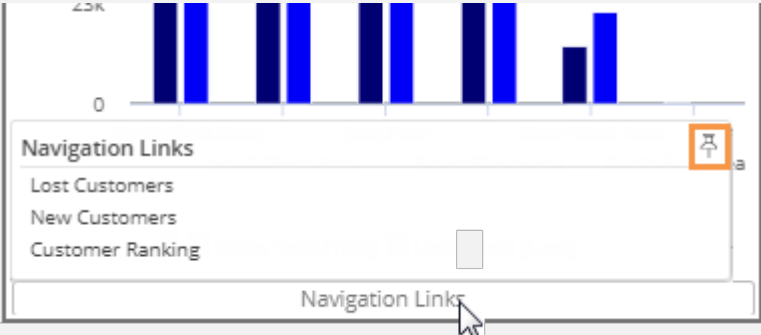

The thumbnail is an uploaded image called a badge if one has been assigned to the dashboard or a general image based on the upper-left widget type.



If you wish, you can bypass the portal changing the home page in user preferences.

Accessing dashboards

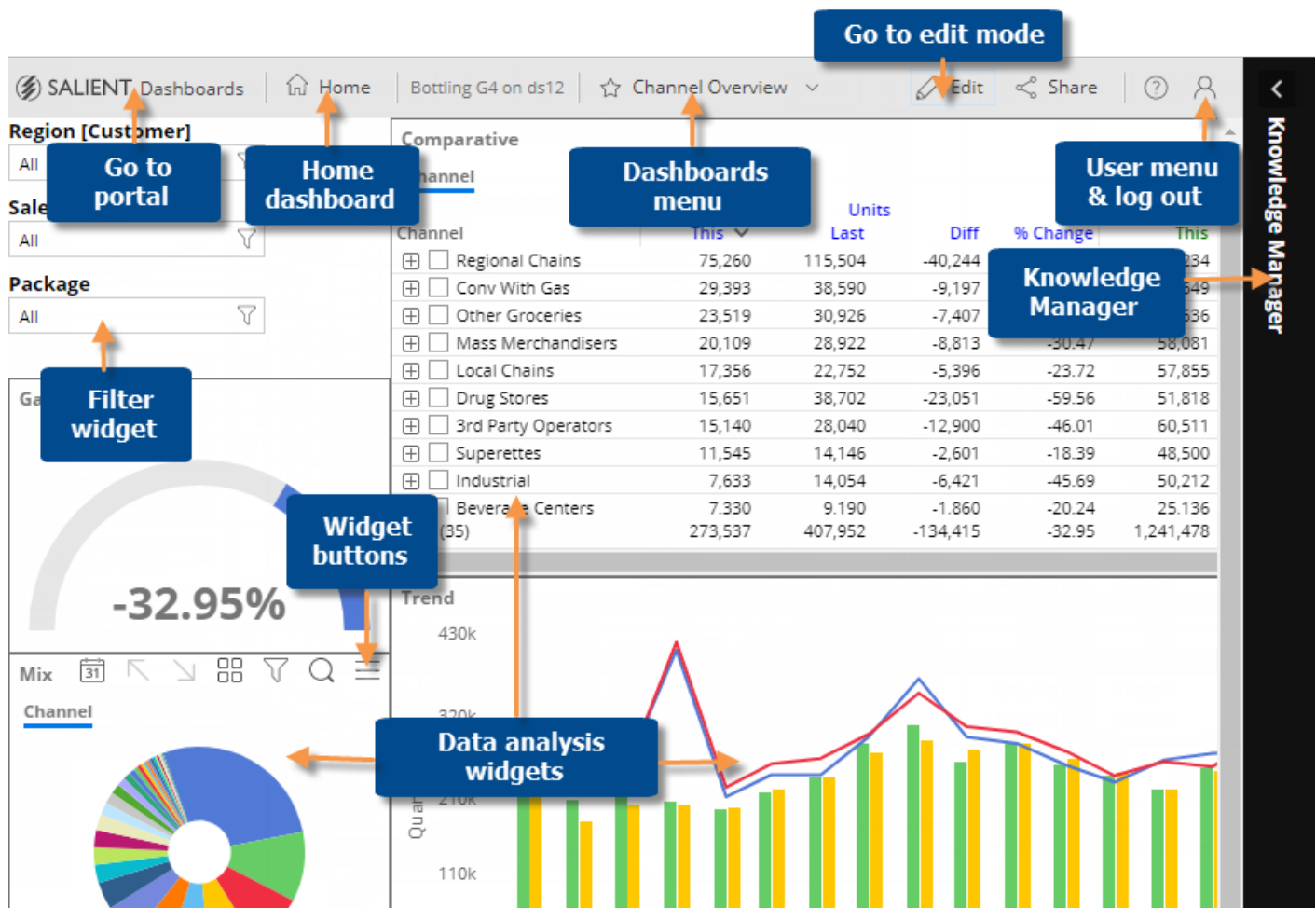
Option	Explanation
<p>Portal</p> 	<p>Log in and then click on a dashboard icon in the portal (see page 8) to open it.</p>
<p>Dashboards menu</p> 	<ol style="list-style-type: none"> 1. In edit mode or view mode, click the dashboards drop-down button at the top of the screen. If a dashboard is already open, this button displays its name. 2. In the pop-up window, you can search for a dashboard or open a dashboard category and folder to find a dashboard. 3. Click on the dashboard you want to open.
<p>URL</p> 	<p>Go directly to a specific dashboard by entering its URL or marking it as a favorite in your browser. You may be required to log in. Your administrator or other users may share dashboard URLs with you or provide links using other methods such as a web page.</p>

Option	Explanation
<p data-bbox="151 285 472 310">Embedded dashboard links</p> 	<p data-bbox="1016 285 1461 373">A widget may have pre-configured links to other dashboards via a button or panel.</p>
<p data-bbox="151 718 280 743">Mobile app</p> 	<p data-bbox="1016 718 1458 835">Access dashboards through the mobile app for optimal viewing on mobile devices. Additional installation and setup is required.</p>

The Dashboards Screen

View mode

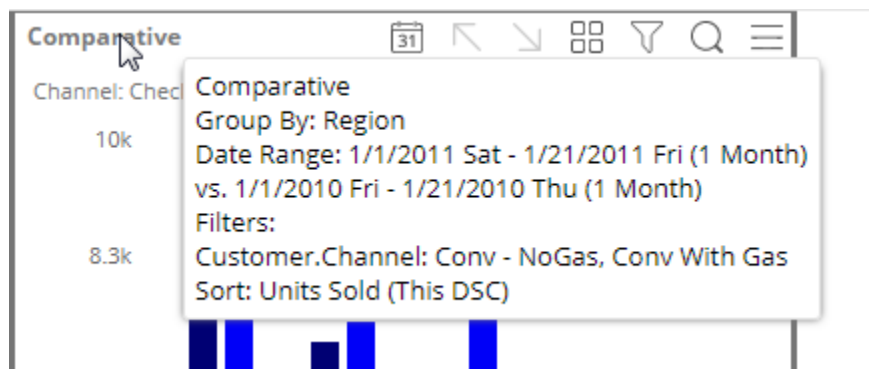
After you open a dashboard, you should see an opening screen similar to the following picture. The screen will look different depending on the setup of the selected dashboard.



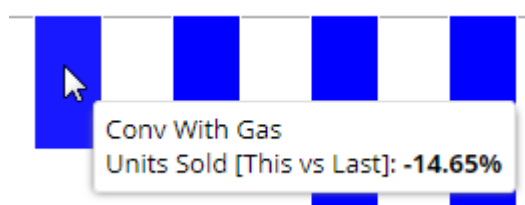
- **Dashboard menu** - Click on the dashboard name to access a menu where you can open other dashboards.
- **Edit** - Lets you edit the dashboard (requires dashboard editing privileges).
- **Knowledge Manager (see page 41)** - allows users to share and view comments, documents, and other soft knowledge.
- **Data analysis widget** - an individual, interactive window showing data.
- **Widget buttons** (visible on mouseover) - lets you change the date (if enabled), drill, switch between numbers/graph, filter, search, etc.
- **Filter widget** - an interactive menu that lets you filter the data. These widgets are optional and must be built into the dashboard.

Dashboard tooltips

It is important to understand what data you are looking at in each widget. For example, you should know if you are viewing data for a particular region or the entire organization. Mouse-over tooltips are available to show you information about the By, date range, sort, filters, and more, for each widget. To see the tooltip, place your cursor over the widget title bar.



You can also view information about specific items within a widget by placing your cursor over the item. (Some mobile devices may not support mouse-over tooltips.)



Widget buttons


The widget toolbar buttons located in the widget's upper-right corner (on mouseover) let you change and interact with the widget. The availability of these buttons depends on the widget's configuration.




- - Select measures (i.e., show/hide). This button is only available in Power Viewer or edit mode. In addition, the widget must include multiple measures.
- - Click to change the date range (see page 18). This button is only available in view mode if it is enabled.
- - Drill down (see page 32) on the selected member. This button is only enabled if the widget has multiple "Group Bys" and you have selected or checked at least one member.
- - Drill back up a level. This button is only enabled if the widget has at least one downlevel filter.
- - Click to switch to a graphical format.
- - Click to switch to a numbers (i.e., grid) format.
- - Filter the data.
- - Search for a member.
- - Opens the widget settings menu (see page 38).

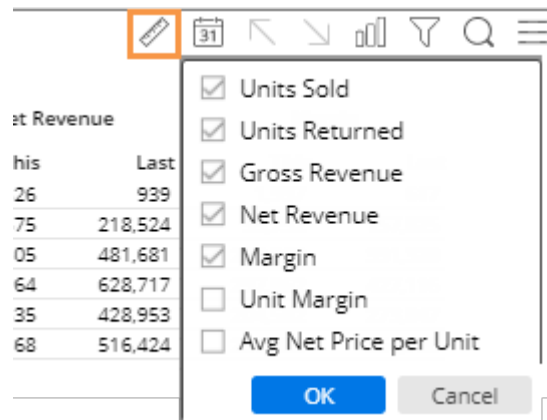
Select Measures

Use the measure selection tool

If a widget includes multiple measures, you may be able to select which measures to show or hide at any given time using the measure selection  tool.

To select measures (Power Viewer only)

1. On the widget title bar, click the  button.
2. In the pop-up window, check the boxes of the measures to show and clear the boxes of the measures to hide. Only measures that have been added to the widget in edit mode are available.
3. Click OK.



Criteria for selecting measures using the  tool

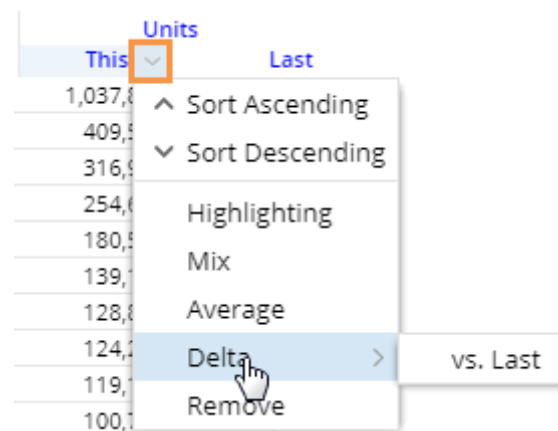
- You must have Power Viewer licensing to select measures in view mode.
- The widget must include multiple measures.
- The widget type must support measure selection.
- Measure selection must be enabled for the widget (on by default).

Insert difference and percent change

In grids that compare two date ranges, you can insert the difference and percent change.

To insert difference and percent change

- 1. Switch to the grid (see page 37) if you haven't already.
- 2. To add the difference/change percent (This-Last), place your cursor over the measure's This column, and click the drop-down arrow. From the pop-up menu, select Delta, vs. Last.



Tip:

To add the difference/percent change between any other values (e.g. values vs. budget), place your cursor over the first subheading in the formula, click the drop-down arrow, and then make your selection. Only measures currently in the widget are available for selection.

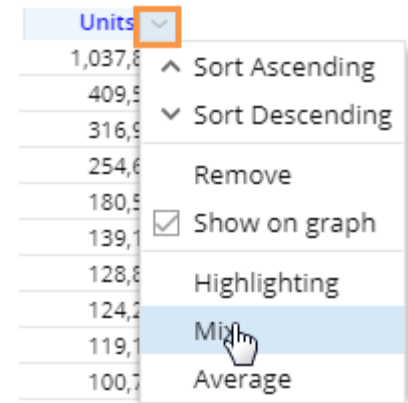


Insert mix

In grids that compare members, you can insert the percent of the total (mix) contributed by each member. In a Trend or Comparative Time Series widget, this adds the percent of the total for each unit of time. You cannot add mix for fields calculated with multiplication or division (such as per unit fields).

To insert mix

1. Switch to the grid (see page 37) if you haven't already.
2. Place your cursor on the column for which you want to add mix values. A drop-down arrow appears.
3. Click the drop-down arrow.
4. On the pop-up menu, select Mix.

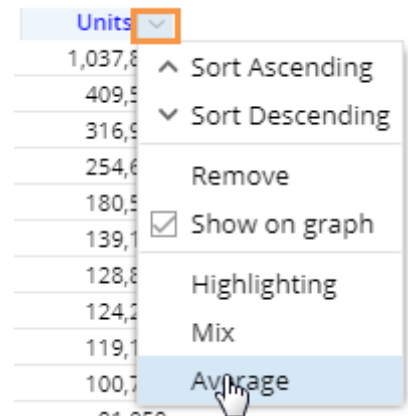


Insert average

In comparative grids, you can insert a column that shows the average per day, week, month, or period in the date range. For example, if the view totals data for past 12 months, the average column would show the average value per month.

To insert average

1. Switch to the grid (see page 37) if you haven't already. For the average column to be meaningful, the widget should show at least two units of time (days, weeks, months, etc.)
2. To add the average for This date range, place your cursor over This column; to add the average for Last date range, place your cursor over Last column.
3. Click the arrow that appears and then, from the pop-up menu, select **Average**.



Move measures

To move measures

1. In a grid, click the heading of the measure you want to move.
2. Press the left mouse button, drag the cursor to the new location, and release the mouse button.



Units Returned		Net Revenue		Units Sold
This	Last	This	Last	This
Units Sold	0	2,826	939	305
-10	-18	134,575	218,524	13,269
-319	-586	327,305	481,681	32,800
-380	-536	437,964	628,717	45,246

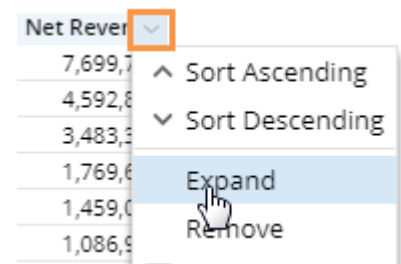
Expand a calculated measure

Many data values are calculated within the UXT system using other measures. To see the formula for a measure, place your cursor over its heading. If you have the necessary rights, you can expand a measure to see all measures used in its formula.

To expand a calculated measure

1. In a grid, place your cursor over the heading of the measure you want to expand and then click the drop-down arrow.
2. On the pop-up menu, select **Expand**.

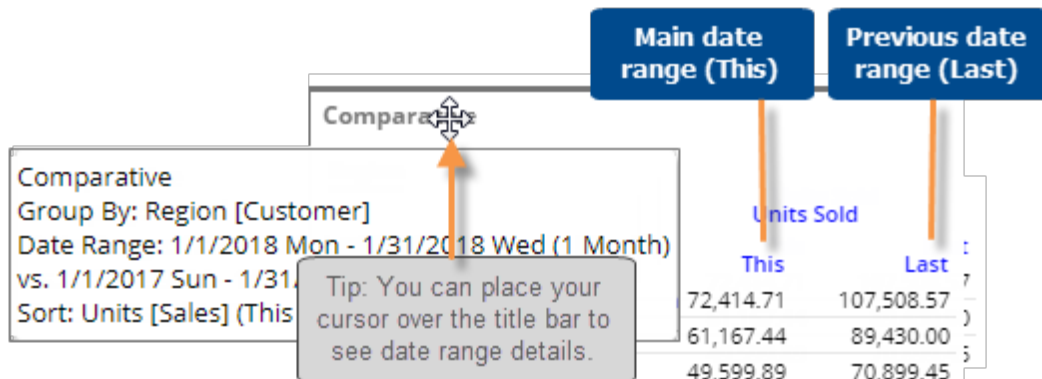
Tip: To remove the measures, access the pop-up menu and select the collapse option.



Net Revenue
7,699,7
4,592,8
3,483,3
1,769,6
1,459,0
1,086,9

Select the Dates


Each widget shows data for a range of dates (days, weeks, months, etc.) that can update nightly. Date settings can be applied per widget and/or linked across multiple widgets, so that date settings update simultaneously. Some widget types allow comparison with a previous date range.




Depending on the configuration of the dashboard, users may be able to change the date range the following ways in view mode or the mobile app:

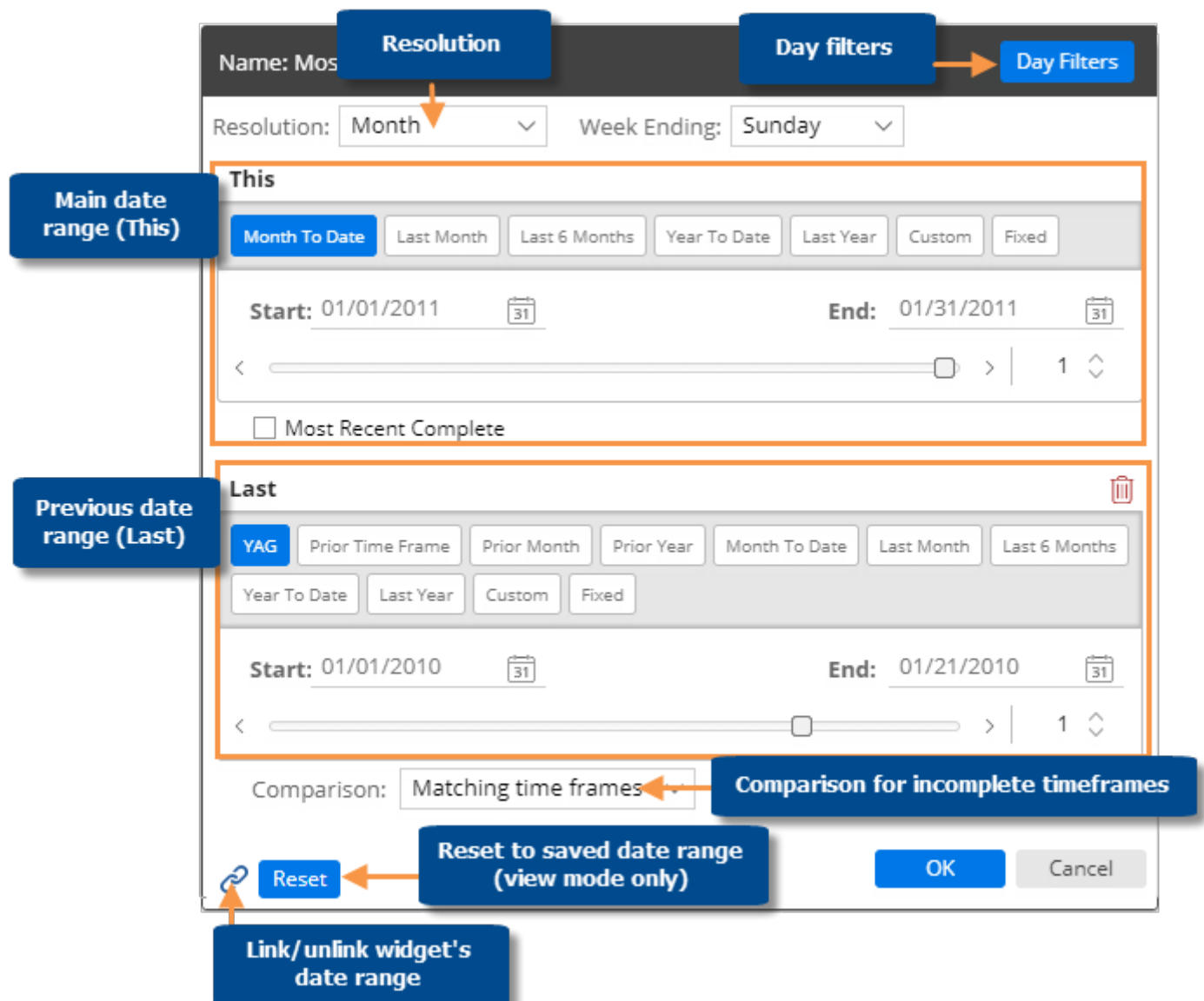
Viewer date options	Explanation
<p>Date setup icon</p> <p>Units Sold</p> <p>This Last</p> <p>168,646 247,354</p>	<p>By default, each widget will have a date setup icon (see page 18) that allows the user to change the date setup, including resolution, number of dates, start/end dates, and other settings. This icon may be disabled for a widget.</p>
<p>Date selector</p> <p>Weekly (Sun) End Date</p> <p>Most Recent Complete(1/23/2011)</p> <p>1/23/2011</p> <p>1/16/2011</p> <p>1/9/2011</p> <p>1/2/2011</p>	<p>A date selector (see page 20) allows users to change the <u>end date</u> of multiple widgets using a drop-down menu. The date selector affects all widgets in the dashboard by default, but may be turned off for specific widgets.</p>

Date setup

If the widget has a date setup icon  in its title bar, you can change its date range, including the resolution, number of dates, comparison date range, etc.

To select the date setup

1. Click the date setup icon  in the title bar of the widget.
2. In the dialog, choose from the following date settings. The available options depend on the dataset and may be pre-configured by your administrator.

Name: Mos

Resolution: Month **Week Ending:** Sunday

This

Month To Date Last Month Last 6 Months Year To Date Last Year Custom Fixed

Start: 01/01/2011 **End:** 01/31/2011

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☐ Most Recent Complete

Last

YAG Prior Time Frame Prior Month Prior Year Month To Date Last Month Last 6 Months

Year To Date Last Year Custom Fixed

Start: 01/01/2010 **End:** 01/21/2010




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Comparison: Matching time frames


Reset **OK** **Cancel**

Reset to saved date range (view mode only)

Link/unlink widget's date range


Option	Explanation
Resolution (i.e. days, weeks, months, or customized periods, etc.)	Choose the units of time from the menu at the top of the dialog. This selection controls which date presets will be available.
Main date range (This)	Under This , click the button of the date range to view. The available date presets depend on the resolution selected above and the dataset configuration. If you wish, you can customize the date range further after making your selection.
Day filters (optional)	Optionally, click the Day Filters button at the top of the dialog to choose specific days of the week or business days within the date range to analyze. Data for all other dates will be filtered out.
Comparison date range (Last)	<p>Under Last, click the button of the previous date range. If the dialog does not include a Last section, click Add Date Range to add one. The available options depend on the resolution selected above and the dataset configuration.</p> <p>Tip: A comparison date range is optional in many widget types. If you want to look at a single date range only, you can click  to remove Last.</p>
Comparison for incomplete timeframes	<p>A Comparison option at the bottom of the dialog determines how to select the dates in Last date range when This date range is incomplete.</p> <ul style="list-style-type: none"> • Matching time frames - Adjust the number of days in Last date range to match the number of days in This date range for a precise view of gain/loss (i.e. how much better/worse are we doing). For example, compare March 1 through 15 of this year with March 1 through 15 last year. • Complete last period - Do not adjust the number of days in Last date range; instead show the complete last month or period for a gap or goal perspective (i.e. how much more to go). For example, compare March through 15 of this year with the full month of March last year.
Linked dates	<p>Toggle the link icon at the bottom of the dialog to link or unlink the widget's date range, depending on whether or not you want the date range to update automatically with other widgets.</p> <p> - indicates that the widget's date range is linked to other widgets. In view mode, the date ranges of all linked widgets update simultaneously when one of them is changed.</p> <p> - indicates that the widget's date range is unlinked and, therefore, has its own stand-alone date range.</p>

Tips:

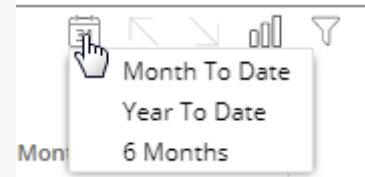
In view mode, you can click the  button to revert the date range back to the last saved settings.

Tips:

Multi Comparative widgets can show additional date ranges besides the standard This and Last ranges (e.g., MTD vs. YAG and YTD vs. YAG).

To edit a date range for a Multi Comparative, click  in the widget's toolbar and then select the name of the date range.

Multi Comparative date ranges cannot be linked to other widgets.

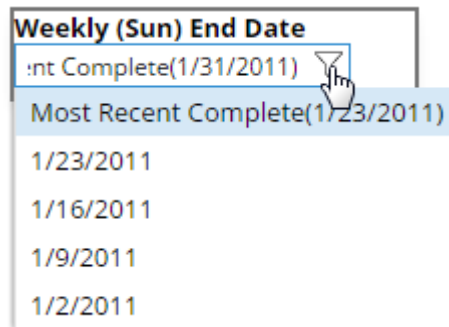


Use a date selector

If the dashboard has a date selector, users can shift the dates of multiple widgets in the dashboard using a drop-down menu. Date selectors do not change the resolution or number of dates in the range.

To use a date selector

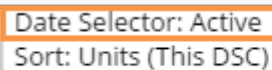
1. Click the drop-down menu.
2. Select a date from the menu to adjust what is considered to be the "current" date. This generally controls the end date of widgets.



Tip:

A date selector does not affect fixed date widgets. A date selector affects all "linked" widgets unless they have a fixed timeframe.

You can see whether a date selector is active or inactive for a given widget by placing your cursor over its title to see the tooltip.

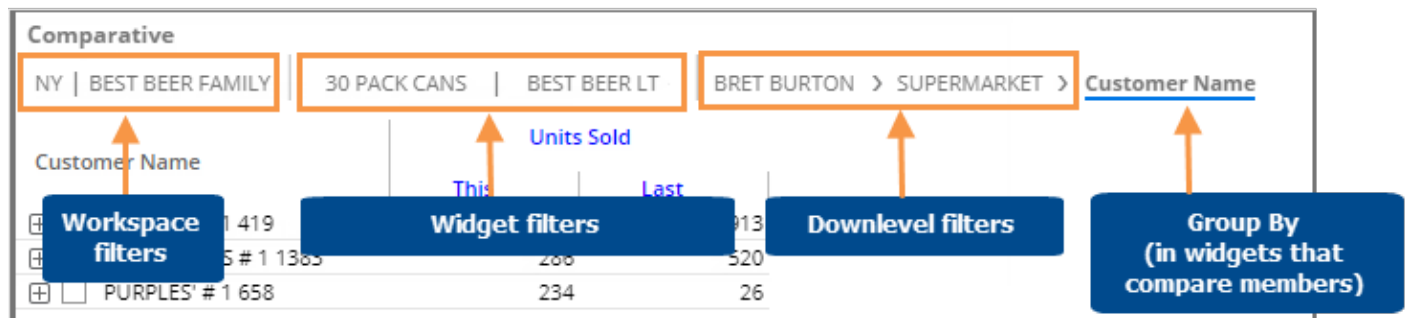
A screenshot of a widget title tooltip. The tooltip is displayed over the title "Date Selector: Active". The text in the tooltip is "Date Selector: Active" and "Sort: Units (This DSC)".

Date Selector: Active
Sort: Units (This DSC)

Group By Attributes

Group By and filter using the breadcrumb path

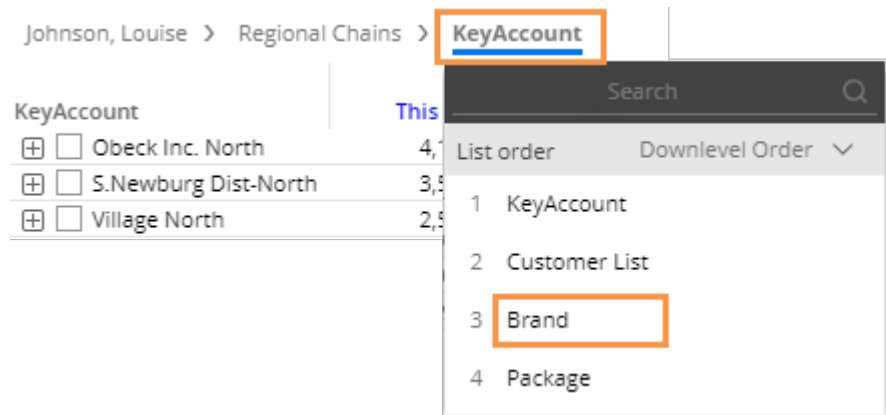
The breadcrumb path at the top of the widget shows how data is grouped (i.e., Group By) as well as filters applied to the widget (including workspace filters, widget filters, and downlevel filters).



In view mode and edit mode, you may be able to change the By, edit filters, and remove filters using the breadcrumb path. The available options depend on the configuration of the widget, and whether or not you have Power Viewer licensing.

To change the By (only in widgets that compare members; Power Viewer only)

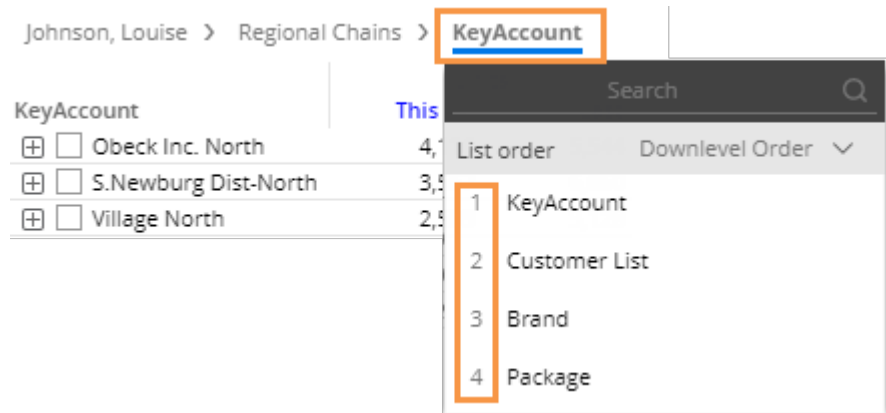
1. Click the By in the breadcrumb path (underlined).
2. In the pop-up dialog, click the name of the dimension by which to group the data. Only dimensions pre-configured in edit mode are available for selection.



Tip: You can search for a dimension by entering the first few characters at the top of the dialog.

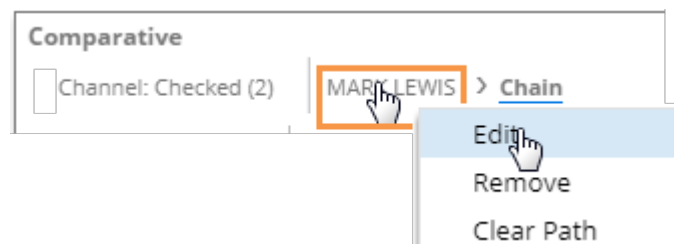
To change the drill order (only in widgets that compare members; Power Viewer only)

1. Click the By in the breadcrumb path (underlined).
2. In the pop-up menu, select from the number drop-downs to adjust the drill order. Only dimensions pre-configured in edit mode are available for selection.

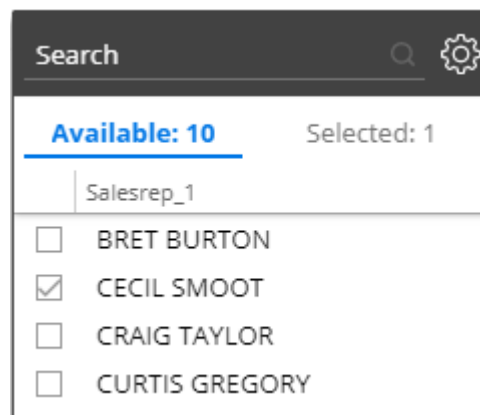


To edit an existing filter (i.e., select different members)

1. Click on the filter in the breadcrumb path and select **Edit**. (This option is not available for workspace filters.)

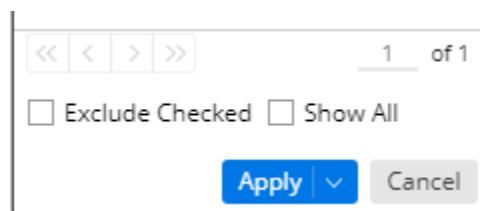


2. In the pop-up dialog, select the desired members. By default, the dialog only shows members with data within the current path. To list other members, click **Show All** at the bottom of the dialog.



3. Click **Apply**.

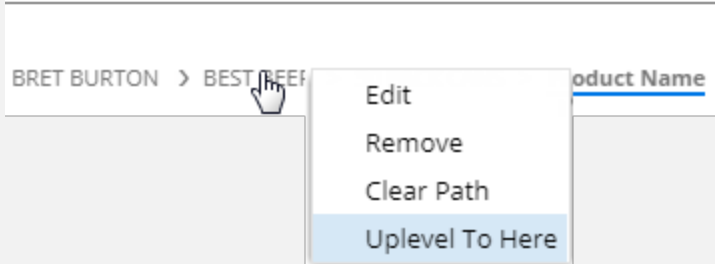
Tip: To apply a filter to all widgets, click the arrow beside the Apply button and select **Apply to Workspace**.



To remove filters

1. In the breadcrumb path, click on the filter (workspace, widget, or downlevel filter).
2. Select from the following options.




Option	Explanation
Remove	This option removes a single filter of any type (widget, workspace, or downlevel).
Clear filters	This option removes all widget filters and clears (i.e., turns off) all workspace filters. This option does not remove downlevel filters.
Clear path	This option removes all downlevel filters; it does <u>not</u> remove workspace or widget filters. The By stays the same.
Uplevel to here	<p>This option removes all downlevel filters from the selected filter downward. The By becomes the dimension of the selected level (for example, Brand).</p>  <p>A screenshot of a dashboard breadcrumb path: "BRET BURTON" > "BEST DEEP" > "Product Name". The "BEST DEEP" filter is highlighted. A dropdown menu is open below it, showing options: "Edit", "Remove", "Clear Path", and "Uplevel To Here". The "Uplevel To Here" option is highlighted in blue.</p>

Expand members

In grids that compare dimension members, you can expand one or more members to see subgroupings within them. You can expand the 1st By dimension to see the 2nd By, the 2nd By dimension to see the 3rd By, etc.

To expand members

Click the  button beside the member.

You can expand additional levels of data (e.g., 2nd By, 3rd By, etc.).

Tip: Multiple By dimensions must be selected (in edit mode) in order to expand.

Comparative		Unit
Channel		
<input checked="" type="checkbox"/>	BAR/TAVERN/COCK	1,750
<input type="checkbox"/>	CASINO	400
<input type="checkbox"/>	#INDEPENDENT	400
<input checked="" type="checkbox"/>	ALTWALTER	375
<input type="checkbox"/>	ITHACA	275
<input checked="" type="checkbox"/>	DAN MANNING	275

Tips:

The selected sort method (see page 38) determines the order within all By dimensions.

Check members

In grids that compare members, you can selectively checkmark any dimension members or key members to view their subtotals, drill down on them, show the checked members in graphs, and more.

To checkmark members

Click the ☐ box(es) beside the member(s).

<input type="checkbox"/>	ITHACA
<input checked="" type="checkbox"/>	ALFRED
<input type="checkbox"/>	ROCHESTER
<input type="checkbox"/>	ALTWALTER

Tips:

After checking members, you can view subtotals by clicking the subtotal button at the bottom of the widget.

You can drill down on the checked members by clicking the Downlevel button and selecting Drill into Checked.


<input checked="" type="checkbox"/>	Total (4)
Checked (1)	20,019
Unchecked (3)	48,014
Total (4)	68,033

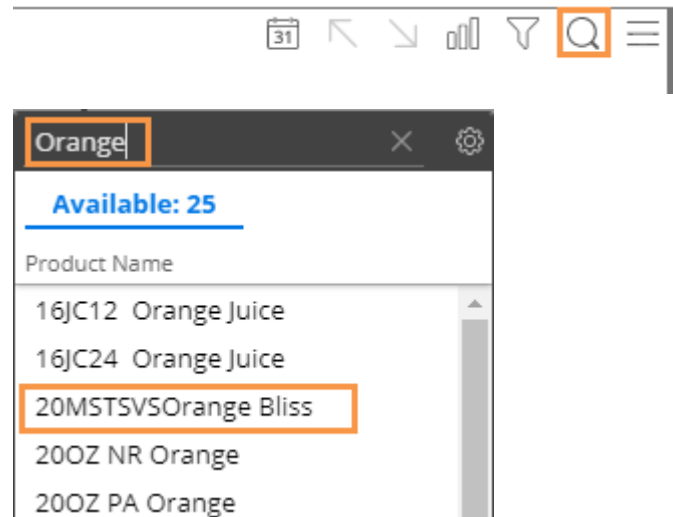
Net Revenue	<div><div>Drill into Focus Row</div><div>Drill into Checked Rows</div></div>
-------------	--

Search

You can perform a search to find specific items in a widget that lists multiple members. The search looks in the current page and any additional pages of data.


To search


1. Click the  button at the top of the widget (visible on mouseover).
2. In the Search window, type some or all of the characters in the item you want to find.
3. The window automatically returns a list of the member(s) that meet the criteria.
4. Click on the desired member to select that item in the widget. If the member is on a different page, the widget goes to that page.

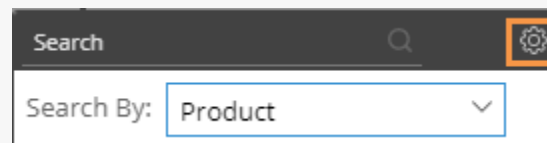
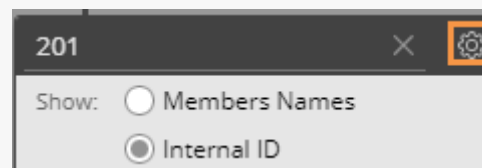


Tips:

To reset the search, click the **x** button at the top of the Search window.

By default, the search looks for matching items based on their names. To search by code, click the  button and choose Internal ID.

In key lists, the search uses the first description (e.g., customer name) by default; however, you can click the  button to search by a different description or the key code. To search by the key code, select the name of the key.



Filter

The breadcrumb path at the top of the widget shows the filters currently applied to the widget and lets you edit or remove filters. The breadcrumb path does not show filters based on collections or user account rights. However, you can place your cursor over the title bar to see a tooltip that includes all filters.

The diagram illustrates a dashboard widget titled "Comparative" with a breadcrumb path: **NY | BEST BEER FAMILY | 30 PACK CANS | BEST BEER LT | BRET BURTON > SUPERMARKET > Customer Name**. Below the path, a table displays data with columns: Customer Name, Units Sold, and Last. The table includes rows for "PURPLES' #1" and "PURPLES' #2".

Four callout boxes identify filter categories:

- Workspace filters**: Points to "NY" and "BEST BEER FAMILY".
- Widget filters**: Points to "30 PACK CANS" and "BEST BEER LT".
- Downlevel filters**: Points to "BRET BURTON" and "SUPERMARKET".
- Group By (in widgets that compare members)**: Points to "Customer Name".

You can also access filters by clicking the filter button at the top of the widget.

The screenshot shows the "Filters" dialog box with a "Create a filter" input field. The dialog is organized into three sections:

- Downlevels**: Includes "Channel (Customer)" with a "SUPERMARKET" filter.
- Widget Filters**: Includes "Package (Product)" with a "30 PACK CANS" filter.
- Workspace Filters**: Includes "Supervisor (Customer)" with an "ITHACA" filter and "Brand Family (Product)" with a "BEST BEER FAMILY" filter.

An "OK" button is located at the bottom right of the dialog.

Pre-configured filters


Your administrator may apply filters (via password collections and other methods) to filter the data available to you. If your account has a conditional password collection applied, then the data may be filtered in some views and not filtered in others. For example, the data may be filtered for customer-level details but summary-level views may be allowed. For more information, contact your system administrator.

Interactive widget filters

Interactive widget filters let users create filters based on pre-set dimensions. Users can select any members within those dimensions to view the corresponding data. Widget filters are available in view mode and edit mode.

To create a widget filter

1. Click the filter button at the top of the widget (visible on mouseover).

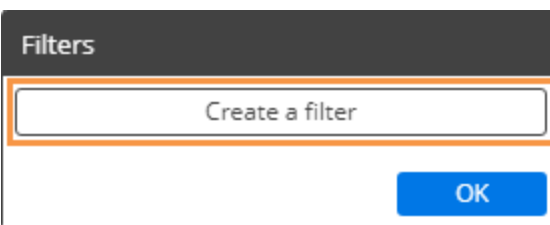


The screenshot shows a toolbar with several icons: a calendar icon with '31', a left-pointing arrow, a right-pointing arrow, a bar chart icon, a funnel icon (the filter button, highlighted with an orange box), a magnifying glass icon, and a hamburger menu icon.

Below the toolbar, a table titled "Units Sold" is displayed. The table has four columns: "Diff", "% Change", and "Last". The first column is unlabeled but contains numerical values.

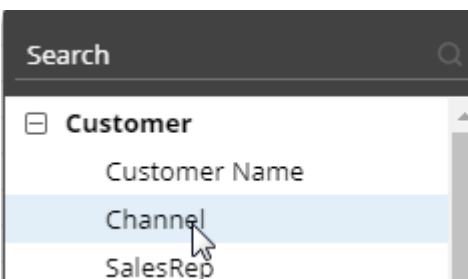
	Diff	% Change	Last
2,691	283	11.75	2,408
2,605	-154	-5.58	2,759
2,483	617	33.07	1,866
2,148	97	4.73	2,051

2. In the pop-up dialog, click **Create Filter**.



The screenshot shows a dialog box titled "Filters". It contains a text input field with the placeholder text "Create a filter". Below the input field is a blue button labeled "OK".

3. Select the dimension for which to create a filter. Only dimensions selected in edit mode (under Group By/Filter By) are available as widget filters.



The screenshot shows a dialog box titled "Search". It contains a list of dimensions under the "Customer" category. The dimensions are "Customer Name", "Channel", and "SalesRep". The "Channel" dimension is highlighted with a blue background, and a mouse cursor is pointing at it.

To create a widget filter

4. Checkmark the desired member(s).
5. Click **Apply** to apply the filter to the selected widget only, or click the drop-down arrow and select **Apply to Workspace** to apply the filter to all widgets in the dashboard.

Tips:

If the widget has checked members, then an option appears in the Filters dialog (Step 2) to let you filter based on the checked members.

By default, the Search dialog (Step 4) shows only members with data in the current context. If you wish, you can check **Show All** to list all members.

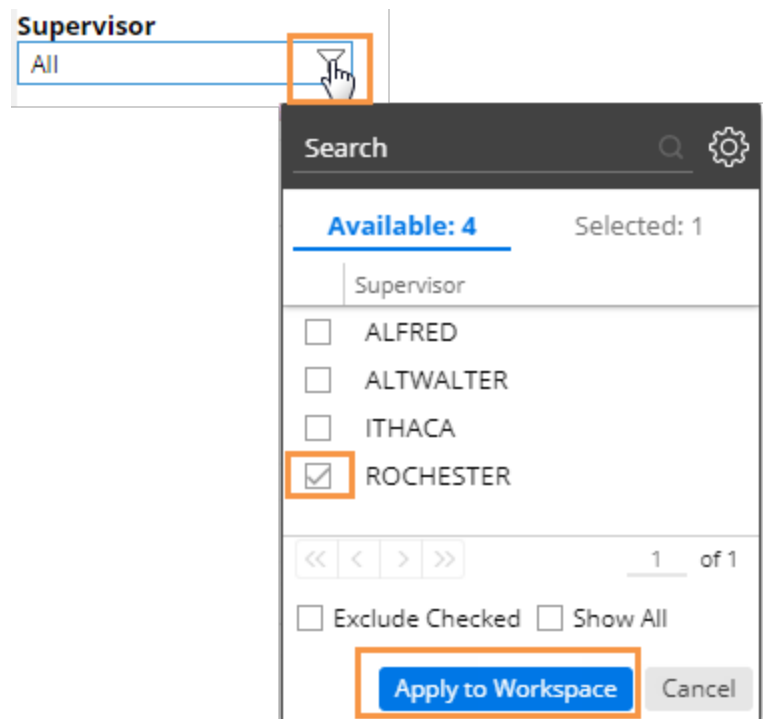
The **Exclude Checked** option lets you show data for all members except the selected members.

Workspace filter widgets

A workspace filter widget is an interactive menu that can be added to the dashboard to allow users to select the members to view. This type of filter affects all widgets in the dashboard by default. Workspace filter widgets are added in edit mode.

To select from a workspace filter widget

1. Click the filter button on the filter widget.
2. In the dialog, place a check beside all members for which you want to see data.
3. When you are finished, click **Apply to Workspace**.



Tips:

To quickly clear a workspace filter (i.e. view data for All), you can click the **X** button on the right side of the filter.



By default, the dialog only shows members with data in the current context. You can click **Show All** in the dialog to list all members.


If the dashboard has multiple workspace filters, then all of the filters (including workspace filter widgets and workspace filters without a separate menu) affect each other (i.e., they filter the available members in other filters). Therefore, you may need to change a filter to All in order to select a member from another filter.

Workspace filters (no widget)

You can apply a filter to the workspace (i.e., all widgets in the dashboard) without a separate filter widget.

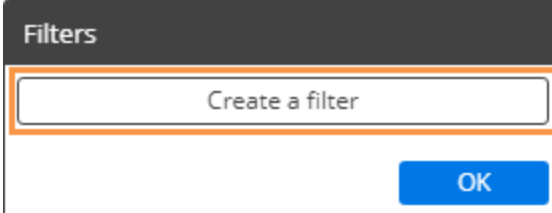
To apply a filter to the workspace (only available for "Group By" dimensions)

1. Click the filter button at the top of any widget (visible on mouseover).



Units Sold				
	Diff	% Change	Last	
2,691	283	11.75	2,408	
2,605	-154	-5.58	2,759	
2,483	617	33.07	1,866	
2,148	97	4.73	2,051	

2. In the pop-up dialog, click **Create Filter**.

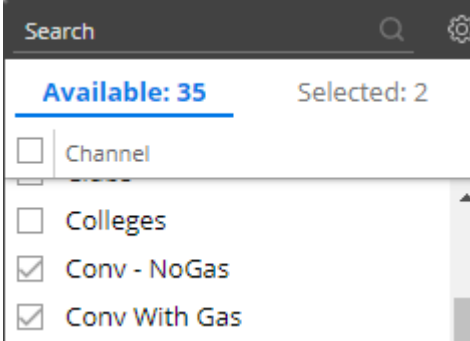


Filters

Create a filter

OK

3. Checkmark the desired member(s).



Search

Available: 35 Selected: 2

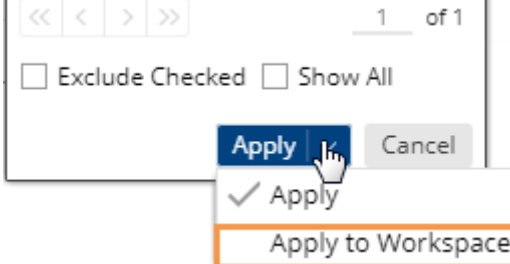
☐ Channel

☐ Colleges

☒ Conv - NoGas

☒ Conv With Gas

4. At the bottom of the dialog, click the drop-down arrow and select **Apply to Workspace**.



<< < > >> 1 of 1

☐ Exclude Checked ☐ Show All

Apply Cancel

✓ Apply

Apply to Workspace

Tip: If the widget has checked members, then another option appears in the Filters dialog to let you filter based on the checked members.




Drill down (i.e., downlevel filters)

You can drill down on one or more members to filter the data in a widget. When you drill, Salient Dashboards adds a downlevel filter to the breadcrumb path.

Drilling is only available in data widgets that include multiple Group By dimensions (configured in edit mode).


To drill down on a single member

Double-click on the row, bar, pie slice, etc., representing that member.

Tip: You can also drill by clicking on a member to select it and then clicking the  button at the top of the widget.

Comparative		
Channel		
Channel	This	% Change
<input checked="" type="checkbox"/> SUPERMARKET	20,575	1.65
<input type="checkbox"/> OTHER OFF-PREMI	19,720	-3.71
<input type="checkbox"/> CONVN-UNSPC-OFF	10,787	-14.06
<input type="checkbox"/> SUPERCENTER	9,076	18.10

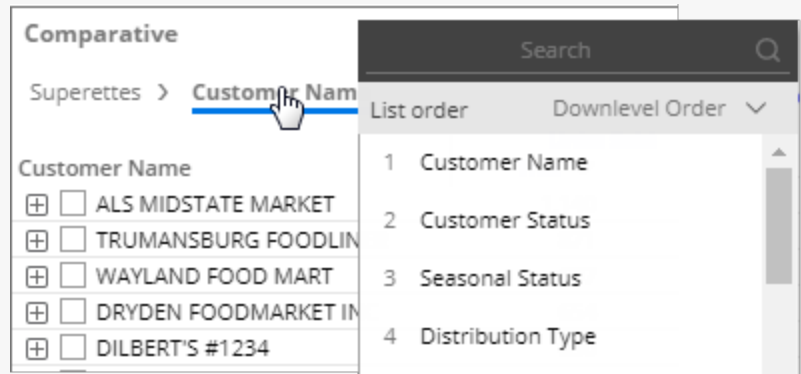
To drill down on a multiple members


1. Check the desired members (see page 25) in a grid.
2. Click  on the title bar at the top of the widget.
3. If a drop-down appears, select **Drill into Checked Rows**.

Comparative		
Channel		
Channel	This	% Change
<input checked="" type="checkbox"/> SUPERMARKET	20,575	1.65
<input type="checkbox"/> OTHER OFF-PREMI	19,720	-3.71
<input type="checkbox"/> CONVN-UNSPC-OFF	10,787	-14.06
<input checked="" type="checkbox"/> SUPERCENTER	9,076	18.10
<input type="checkbox"/> DRUG STORE	2,158	6.25
<input type="checkbox"/> BAR/TAVERN/COCK	1,752	-0.86

Tips:

When you drill, the By becomes what was previously the 2nd By. For flexible drilling, you may be able to change the By and/or downlevel order (see page 21) as you drill (edit mode or Power Viewer only).



After you have drilled down, you can drill back up at any time by clicking  on the widget toolbar.

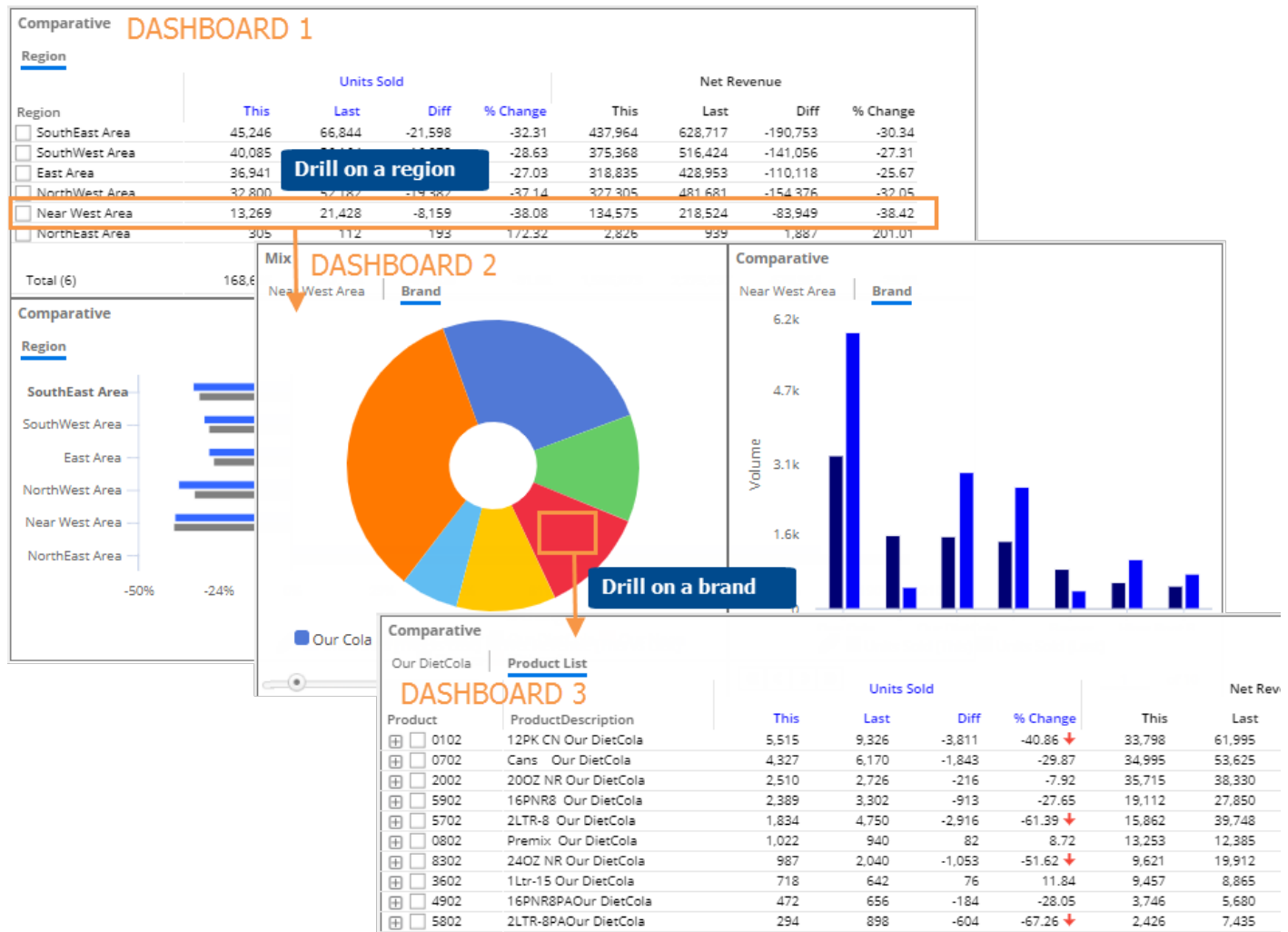
If the dashboard has a workspace filter for the "drilled" dimension, then drilling turns on the corresponding workspace filter and, therefore, may affect other widgets in the dashboard.

If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

Custom drill-downs

A custom drill-down is a set of preconfigured dashboards through which the user can drill. The custom drill path can include a variety of widget types and display settings to optimize the investigative process while allowing the user to select the item(s) on which to drill.

Custom drill-downs can only be created in edit mode; users can utilize custom drill-downs in view mode or edit mode. All of the dashboards in a custom drill-down must be published.

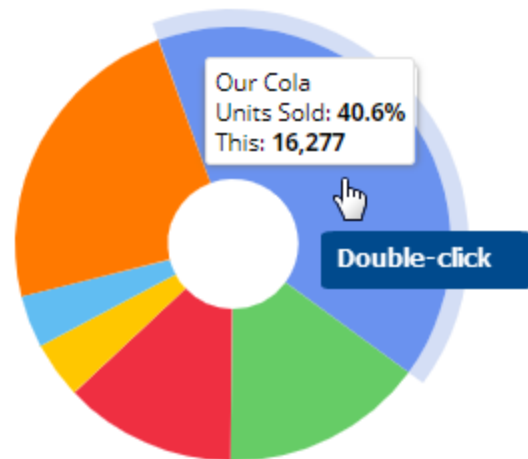


Use custom drill-downs

To use a custom drill-down


1. Open the first dashboard (see page 9) in the custom drill-down.
2. Select the item(s) and drill by double-clicking or using other drill methods (see page 35).
3. You can continue to drill down until you reach the last dashboard in the custom drill-down.

Region	Units Sold		
	This	Last	Diff
<input type="checkbox"/> SouthEast Area	45,246	66,844	-21,598
<input type="checkbox"/> SouthWest Area	40,085	56,164	-16,079
<input type="checkbox"/> East Area		50,624	-13,683
<input type="checkbox"/> NorthWest Area		52,182	-19,382
<input type="checkbox"/> Near West Area	13,269	21,428	-8,159
<input type="checkbox"/> NorthEast Area	305	112	193



Tips:

If the widget has multiple Bys, then you must drill through all of them before the next dashboard will open.


You can drill on multiple member(s) by checking them and then clicking  on the title bar at the top of the widget.

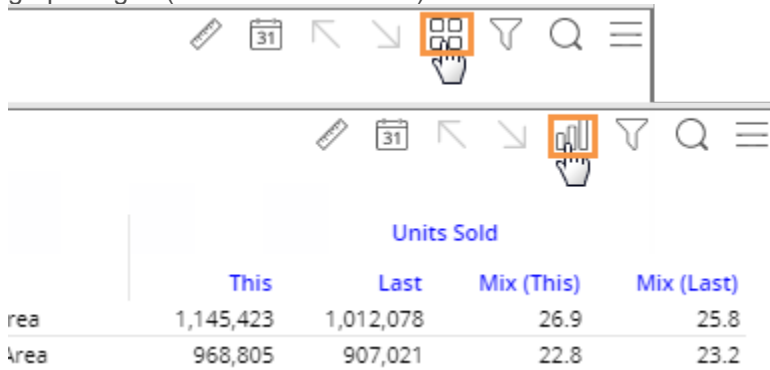
Customize

Switch between grid and graph formats


Various grid and graph formats are available for each analysis type.

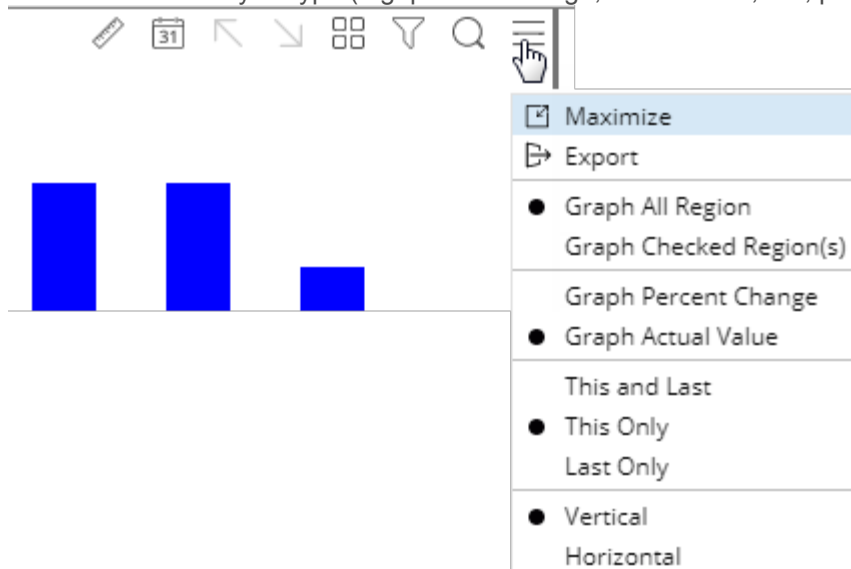
To switch between a grid and a graph

On the title bar of the widget, click  (visible on mouseover) to change from grid to graph or  to change from graph to grid (i.e. table of numbers).



To select a graph format

For graphs, click  in the upper-right corner of the widget (visible on mouseover) to select from available graph formats for the analysis type (e.g. percent change, actual value, bar, pie, etc.).



Sort

To sort

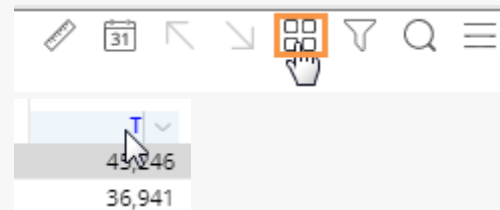
1. Place your cursor over the heading or subheading of the column by which you want to sort.
2. Click the drop-down arrow that appears.
3. In the pop-up menu, select Sort Ascending or Sort Descending.

Units Sold					
Last	Diff	% Char			This
66,844	-21,598	-32		↑	Sort Ascending
50,624	-13,683	-27		↓	Sort Descending
112	193	172			

Tips:

To sort a graph, switch to the grid format and then perform these same tasks; then switch back to the graph.


You can also click a heading to sort; click again to reverse the sort order.






Sorting is available in the following widgets:

- In widgets that compare members, you can sort by values, difference, percent change, etc.
- In Trend widgets, you can sort by date (ascending/descending) or by data (e.g., rank months by volume).

Widget settings menu

You can click  in the upper-right corner of a widget (visible on mouseover) to access several options. The available options depend on your rights and the widget type.



-  - Maximize - Enlarges the widget to the maximum extent of the dashboard.
-  - Restore Down - Returns a maximized widget to its original size.
-  - Export (see page 40) - This button is only available if exporting is enabled for view mode.
- Graph Percent Change or Actual Value (affects graphs only)
- This and Last, This Only, Last Only (affects graphs only)
- Axis Shuttle (affects graphs only; select which measures to plot along each axis)
- Doughnut, Funnel, Pie, Stacked Area, Line, etc. (i.e., graph type))


Save and Share

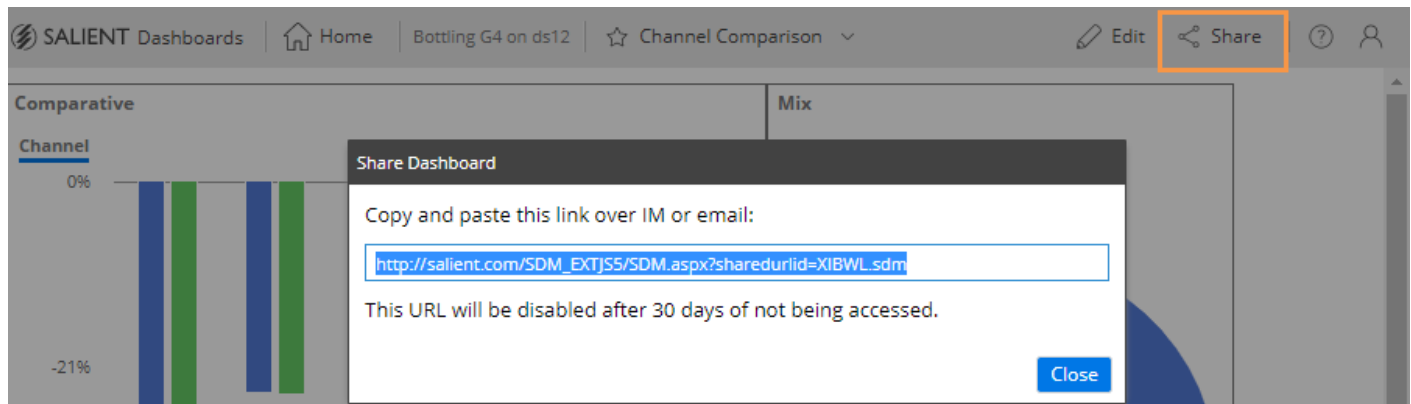
Share a dashboard

Sharing a dashboard creates a temporary dashboard URL, which you can access in future sessions and/or share with other users. If you modify a dashboard (e.g., apply a filter, drill down, change the date, select measures, etc.) prior to sharing it, then the shared dashboard includes these changes, therefore, allowing you to reuse common selections and share them with other users. You can only share published dashboards.

The URL is valid for a number of days (set by your administrator) after the last time it is accessed; therefore, if users continue to access the URL, it will remain available.

To share a dashboard

1. Open the dashboard and make the desired changes. For example, you might filter or change the date.
2. Click  **Share** in the upper-right corner of the screen.
3. In the **Share Dashboard** window, copy the URL using the browser controls (for example, right-click and select Copy in most desktop browsers).
4. Share or save this URL for use by other users or in future sessions.





Export data from a widget

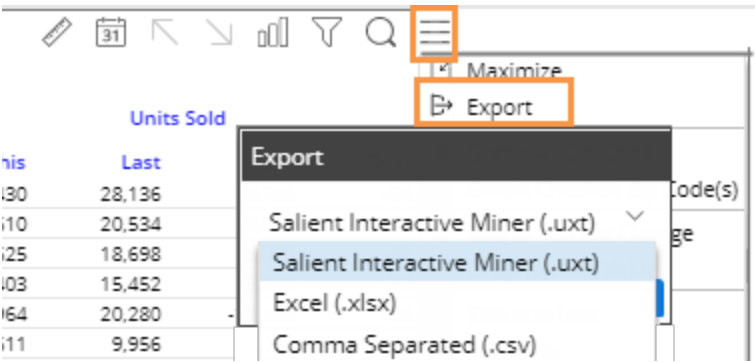
You can export the data from a widget to one of the following file types, depending on dashboard and widget settings:

- UXT file (.uxt), which can be opened in SIM. Because Salient Dashboards and dashboards have functionality differences, the view will be approximately the same between the two applications, but may have minor differences.
- Excel (.xlsx)
- Comma-separated value (.csv)

Note that you can export data from a graph, but in Excel and comma-separated files, the results will only show numbers.

To export data from a widget

1. Customize the widget to use the desired date range, dimension, drill-path, etc.
2. On the title bar of the widget, click  and then select Export .
3. If prompted, in the **Export** dialog, select the file type to which you want to export. The file type may be pre-configured.



4. If you are exporting to Excel or a comma-separated file, you may also have the following options:

What to Export (only in widgets with multiple pages): Choose to export all pages of data or only the current page.

Export 2nd By Option (only if multiple Group Bys are configured): Choose whether or not to export rows for the 2nd By underneath members of the 1st By. If you choose to export 2nd By (i.e., expanded) rows, an additional option (**Include First By Subtotals**) allows you to include or omit a row to show the subtotal value for each member of the 1st By. Be aware that with this option checked, the data includes duplicates and a simple totaling of a column may yield incorrect results. For example:

Region	SalesRep	Units This
Near West Area		20898
Near West Area	Office-Ferkel	4116
Near West Area	Office-Lasoski	3730
Near West Area	Office-Kinser	1025
Near West Area	Office Accounts	1025
Near West Area	Special Event	919

Subtotals row

Expanded rows

Include Host Code Columns: Check this option to include a column(s) for the host codes of the members.

File Name: Specify the file name to use.

5. Click **OK**.

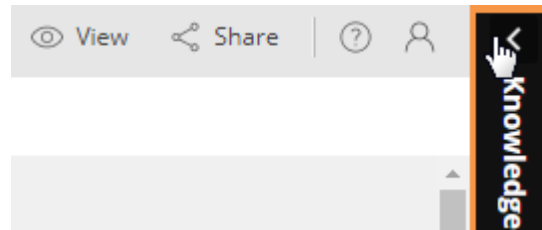
Knowledge Manager

Knowledge Manager enables users to organize thoughts or “soft knowledge” for collaboration. You can add text descriptions, upload images or other resources, and add comments. In addition, this information can be shared between all users across multiple devices in SIM, Salient Dashboards, and the Salient Mobile app (additional setup required).

To show the Knowledge Manager panel

Click the Knowledge Manager on the side of the screen (on the right side by default) to toggle the panel on and off.

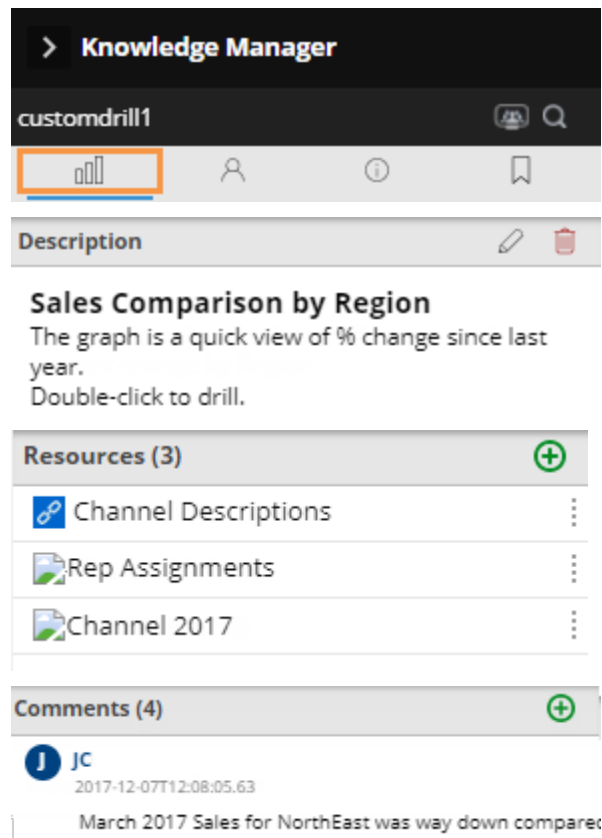
Knowledge Manager includes the following tabs:



Dashboard Info

Allows users who create dashboards to write descriptions and purposes for them.

Resources (links to web pages, pictures or documents) and comments can be included as future reference materials become available.



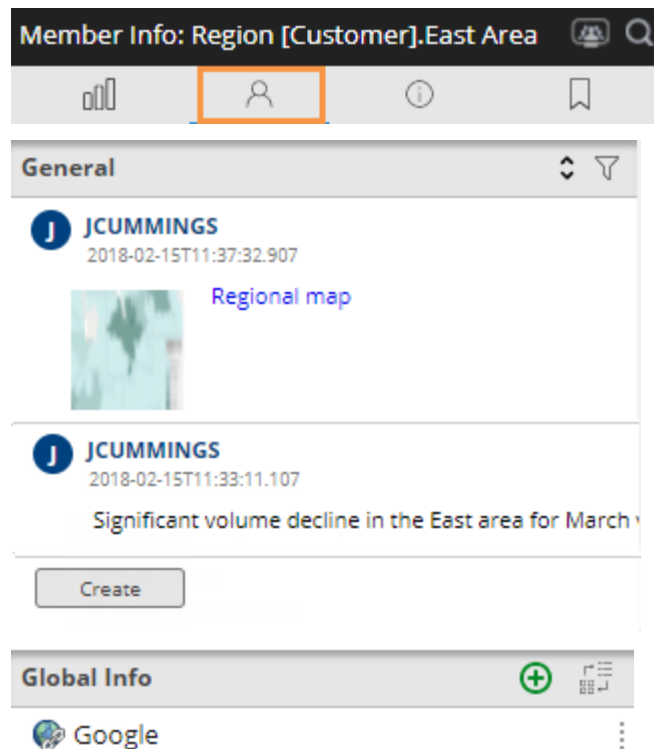
Member Info

Allows you to connect media or non-media information to specific customers, sales reps, products, etc.

Entries can be filtered to keep the most current information on top.

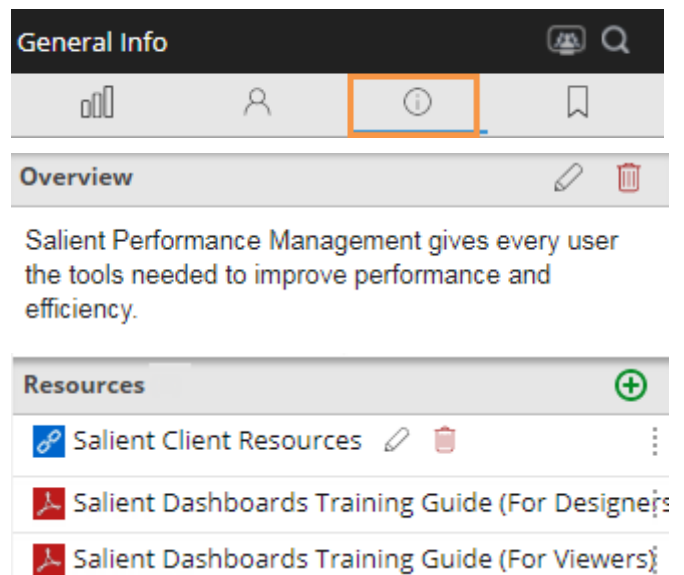
Media examples include news stories, events or related websites.

Non-media can be details on location, entry, specific contact info, or security issues.



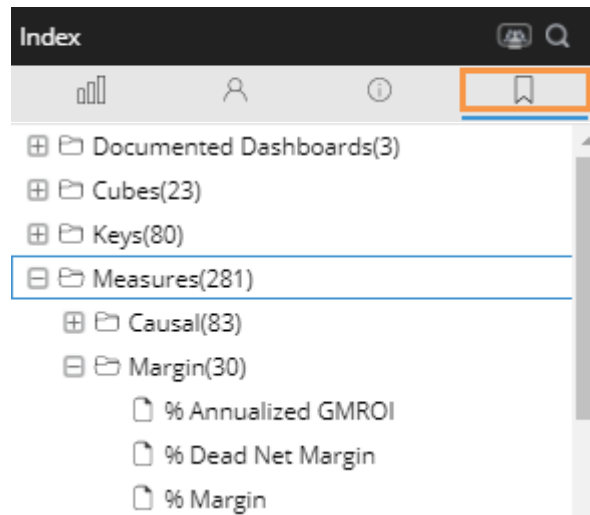
General Info

Adds global information available to most users such as manuals, training material, or information about the dataset.



Index/Search

Search, view, or add information about the schema (keys, dimensions, measures, etc.).



Types of Analysis Widgets

A dashboard can include any of the following data analysis widgets. By default, the widget title bar shows its widget type. You cannot change the analysis type in view mode, but you can switch between grid or graph format (see page 37).

Analysis type

Comparative

Comparison of members for one or two date ranges; any number of measures

Examples

Region	Units Sold		Margin	
	This	% Change	This	% Change
<input type="checkbox"/> SouthEast Area	45,246	-32.31	297,062	-30.45
<input type="checkbox"/> SouthWest Area	40,085	-28.63	257,388	-27.44
<input type="checkbox"/> East Area	36,941	-27.03	204,582	-25.29
<input type="checkbox"/> NorthWest Area	32,800	-37.14	228,863	-30.93
<input type="checkbox"/> Near West Area	13,269	-38.08	93,752	-40.60
<input type="checkbox"/> NorthEast Area	305	172.32	1,997	223.62
Total (6)	168,646	-31.82	1,083,643	-29.88

Units Sold

Margin

SouthEast Area

SouthWest Area

East Area

NorthWest Area



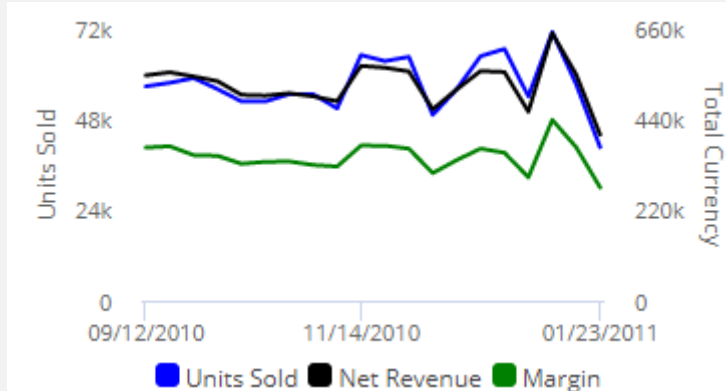

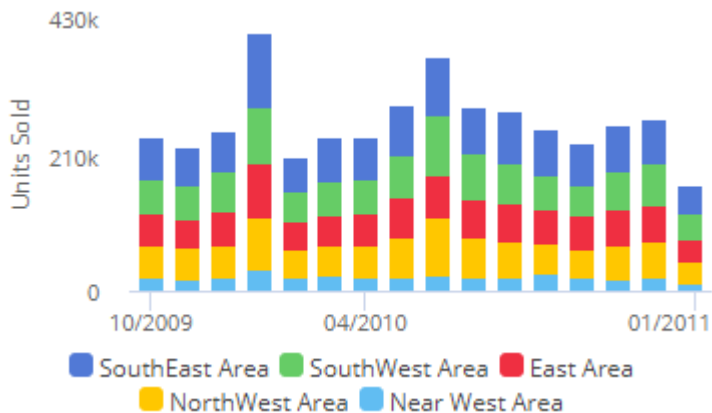
Units Sold (This)



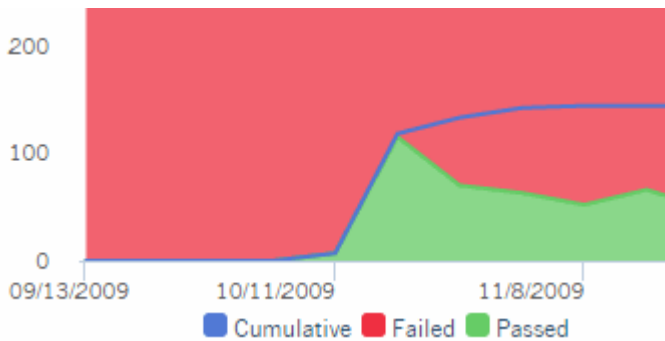

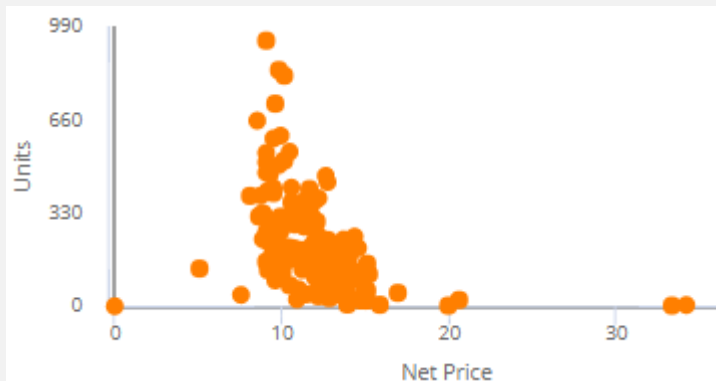

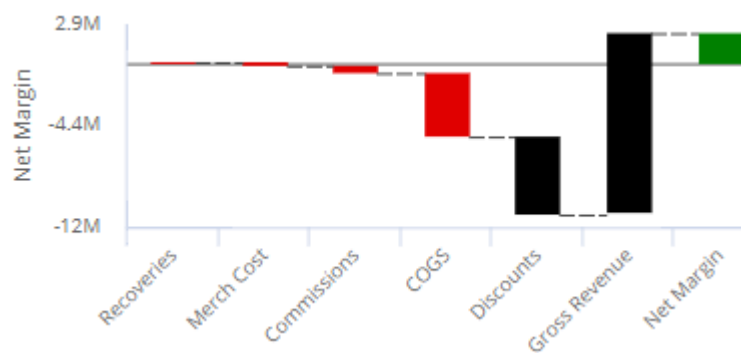
Margin (This)


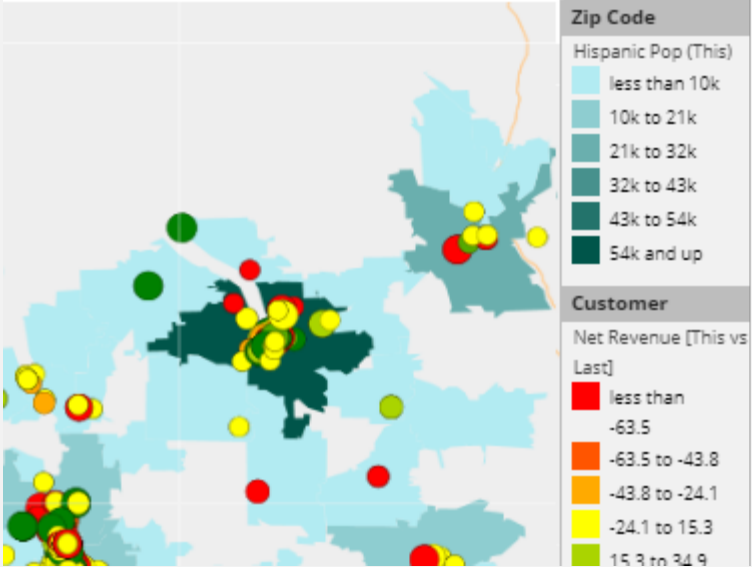

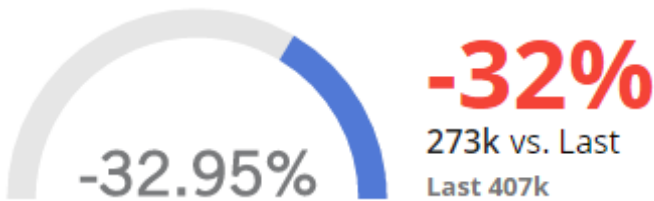

Crosstab

Comparison grid or graph that organizes data by two different attributes (i.e., dimensions)

Region	Our Cola	Our Neon	Our DietCola	Our Lemon-Lime
<input type="checkbox"/> SouthEast Area	27,332	10,090	9,316	2,650
<input type="checkbox"/> SouthWest Area	27,513	8,239	9,750	3,362
<input type="checkbox"/> East Area	25,313	10,343	8,364	2,644
<input type="checkbox"/> NorthWest Area	23,342	9,620	7,189	2,358
<input type="checkbox"/> Near West Area	5,634	2,352	2,772	868
<input type="checkbox"/> NorthEast Area	182	10	32	11

Analysis type	Examples																																								
<div> Multi Comparative</div> <div>Comparison of members for any number of date ranges; any number of measures</div>	<div><div><div>Month To Date vs. YAG</div><div>Units Sold</div></div><div><div>Last Year vs. YAG</div><div>Units Sold</div></div></div> <table><thead><tr><th>Region</th><th>This</th><th>% Change</th><th>This</th><th>Last</th></tr></thead><tbody><tr><td><input type="checkbox"/> SouthEast Area</td><td>45,246</td><td>-32.31</td><td>910,342</td><td>772,763</td></tr><tr><td><input type="checkbox"/> SouthWest Area</td><td>40,085</td><td>-28.63</td><td>762,082</td><td>696,724</td></tr><tr><td><input type="checkbox"/> East Area</td><td>36,941</td><td>-27.03</td><td>706,588</td><td>642,115</td></tr><tr><td><input type="checkbox"/> NorthWest Area</td><td>32,800</td><td>-37.14</td><td>703,359</td><td>627,379</td></tr><tr><td><input type="checkbox"/> Near West Area</td><td>13,269</td><td>-38.08</td><td>279,479</td><td>247,536</td></tr><tr><td><input type="checkbox"/> NorthEast Area</td><td>305</td><td>172.32</td><td>5,114</td><td>8,631</td></tr><tr><td>Total (6)</td><td>168,646</td><td>-31.82</td><td>3,366,964</td><td>2,995,148</td></tr></tbody></table>	Region	This	% Change	This	Last	<input type="checkbox"/> SouthEast Area	45,246	-32.31	910,342	772,763	<input type="checkbox"/> SouthWest Area	40,085	-28.63	762,082	696,724	<input type="checkbox"/> East Area	36,941	-27.03	706,588	642,115	<input type="checkbox"/> NorthWest Area	32,800	-37.14	703,359	627,379	<input type="checkbox"/> Near West Area	13,269	-38.08	279,479	247,536	<input type="checkbox"/> NorthEast Area	305	172.32	5,114	8,631	Total (6)	168,646	-31.82	3,366,964	2,995,148
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<div> Share Trend</div> <div>Comparison trend for multiple members; either actual values or percent of the total for single measure</div>	<div></div>																																								

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<div></div> <div>Exception</div> <div>Pass and fail of key members for an exception test (e.g., customers with units >=1)</div>	<table><thead><tr><th>Channel</th><th>Totals</th><th>Passed</th><th>% Passed</th><th>Failed</th><th>% Failed</th></tr></thead><tbody><tr><td> All Othr On Premise</td><td>1,122</td><td>69</td><td>6.1</td><td>1,053</td><td>93.9</td></tr><tr><td> Industrial</td><td>578</td><td>206</td><td>35.6</td><td>372</td><td>64.4</td></tr><tr><td> Schools</td><td>459</td><td>206</td><td>44.9</td><td>253</td><td>55.1</td></tr><tr><td> Recreation</td><td>444</td><td>55</td><td>12.4</td><td>389</td><td>87.6</td></tr><tr><td> Restaurants</td><td>411</td><td>161</td><td>39.2</td><td>250</td><td>60.8</td></tr><tr><td> Fast Food</td><td>395</td><td>166</td><td>42.0</td><td>229</td><td>58.0</td></tr><tr><td> Other Groceries</td><td>283</td><td>161</td><td>56.9</td><td>122</td><td>43.1</td></tr><tr><td> Colleges</td><td>262</td><td>28</td><td>10.7</td><td>234</td><td>89.3</td></tr><tr><td> Bars / Taverns</td><td>212</td><td>101</td><td>47.6</td><td>111</td><td>52.4</td></tr><tr><td>Total (38)</td><td>5,863</td><td>1,915</td><td>32.7</td><td>3,948</td><td>67.3</td></tr></tbody></table>	Channel	Totals	Passed	% Passed	Failed	% Failed	All Othr On Premise	1,122	69	6.1	1,053	93.9	Industrial	578	206	35.6	372	64.4	Schools	459	206	44.9	253	55.1	Recreation	444	55	12.4	389	87.6	Restaurants	411	161	39.2	250	60.8	Fast Food	395	166	42.0	229	58.0	Other Groceries	283	161	56.9	122	43.1	Colleges	262	28	10.7	234	89.3	Bars / Taverns	212	101	47.6	111	52.4	Total (38)	5,863	1,915	32.7	3,948	67.3
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Analysis type	Examples
 <i>Geo</i> Map showing data values and/or change since another date range	
 <i>Gauge</i> A simple visual tool showing performance; single measure	
 <i>Mix</i> Percent of the total for multiple members for one or two date ranges; any number of measures	