# SALIENT® MANAGEMENT COMPANY

Salient Dashboard Viewer 6.x

Training Guide

Salient Dashboards

Salient Dashboards enable your team to maximize productivity using interactive consolidated visualizations of decision support intelligence. The process starts with Salient Dashboard Designer, a web-based application for designing, building, and sharing dashboards. Dashboard Viewer is the web-based , installation-free application that allows users to view and interact with dashboards in a browser on nearly any computer or mobile device. Power Viewer is an enhanced licensing option that allows Dashboard Viewer users to make additional selections in dashboards, such as changing the attribute, selecting measures, and more. A mobile app is also available for optimized viewing on mobile devices. This document will take you through the basics of accessing dashboards, drilling, and making other selections to view the exact information that you need in Dashboard Viewer/Power Viewer.
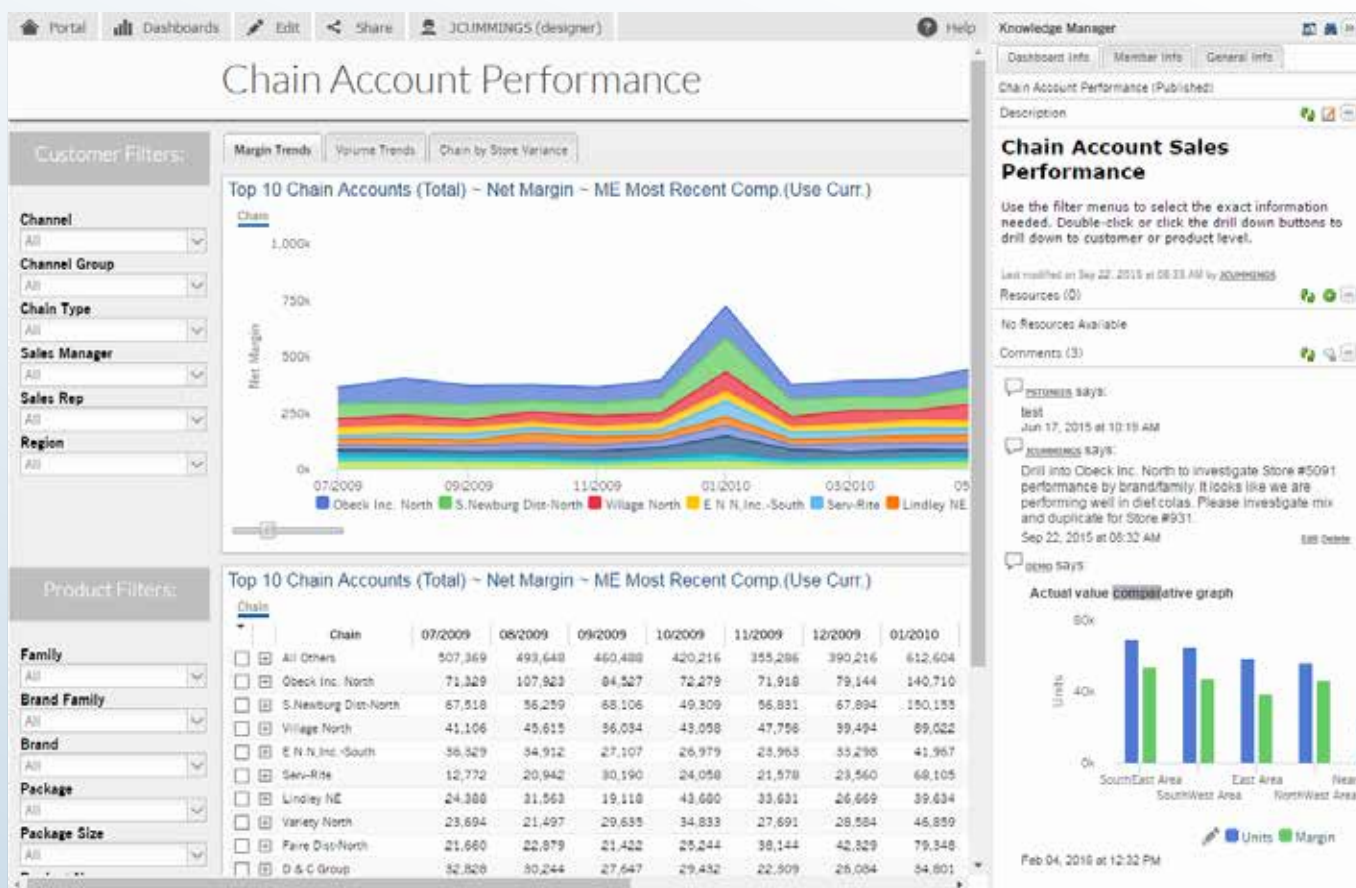
About the Solution

The Salient solution was designed to help managers align, measure and improve their organizations. It provides a logical, intuitive interface that enables visibility into performance feedback from daily activities.

Getting Started:
Accessing Dashboards

You must log in before you can access dashboards using any of the following methods. The login screen automatically appears when you go to the portal or the URL of a specific dashboard(s).

Enter the URL of the portal or a specific dashboard(s).

Browser Compatibility: Salient recommends Google Chrome™.

Dashboard portal (Home view)

To open the portal, enter its URL in a browser window or save it as a "favorite" and then log in (see above). Contact your administrator for the portal URL. All published dashboards are automatically available in the portal.

Navigate to other published dashboards (see the next page).

Go to Dashboard Designer (requires Designer rights).

See all published dashboards organized by folder.

See favorite dashboards

Click to view a dashboard

Use stars to mark your favorite dashboards

Getting Started:
Accessing Dashboards (continued)

Dashboard portal (all dashboards by folder)
Select Dashboards > All to access this view.

See favorite and recent dashboards.

Click to open a folder or go back up a level.

Toggle between thumbnail and outline views.

Search for a dashboard.

Click to open a dashboard.

Other ways to access dashboards:

Go to URL
Go directly to a specific dashboard by entering its URL or marking it as a favorite in your browser. Your administrator or other users may share dashboard URLs with you or provide links using other methods such as a web page.

Go to URL of dashboard deck
A URL may take you to a dashboard deck or "tabbed" view of multiple dashboards if set up by your administrator.
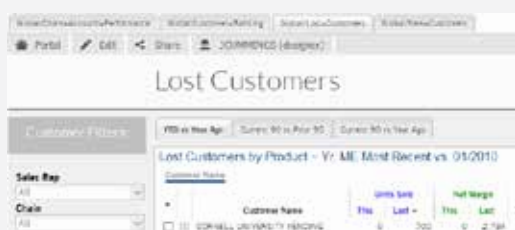
Mobile app
Access dashboards through the mobile app for optimal viewing on mobile devices. Additional installation and setup is required.

Dashboards menu
Navigate to published dashboards using the dashboards menu. If enabled, this menu is located at the top of the viewer.
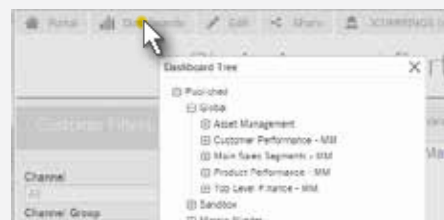
The Viewer Screen

After you open a dashboard in a browser window, you can view and interact with it within the Viewer screen. The exact view depends on the selected dashboard.

Help: In addition to this Guide, a help system is available.

Go to portal

User settings/ logout

Widget

Filters - Select the data to view from filter menus.

Mouseover title or item to see details.

Widget toolbar (see below)

Breadcrumb path - View/ change context. (Only available in Power Viewer.)

Knowledge Manager: Click to view and enter soft knowledge and collaborative intelligence.

Widget toolbar

The buttons at the top of each widget provide different ways to change and interact with the widget. See the remainder of this document for more details.
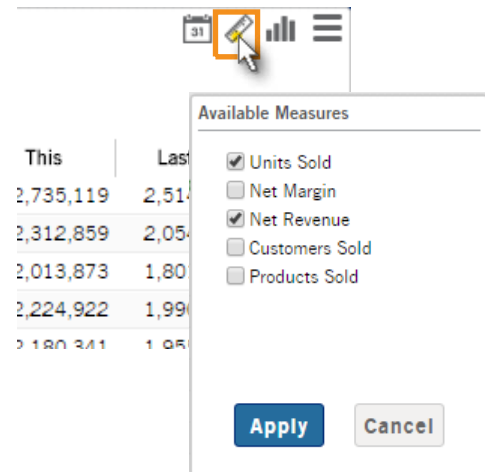
Show/hide measures

Numbers/graph toggle

Change date

Drill down/up

Open options menu
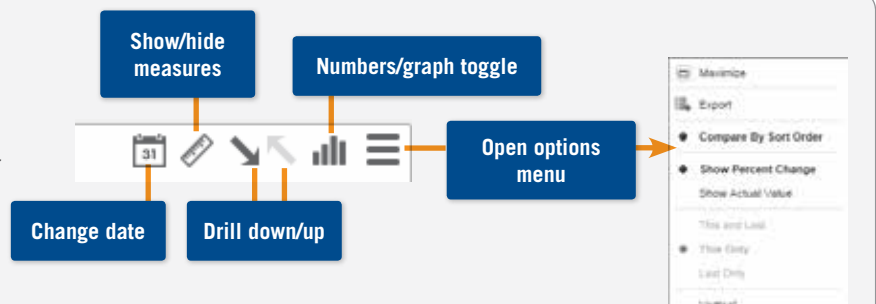
Selecting Measures

Show and hide measures

This capability requires Power Viewer licensing.

Click the ✎ button on the widget toolbar and check the measure(s) to show. Only measures that were added to the widget during dashboard creation are available for selection.
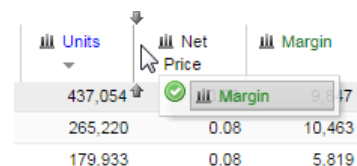
Delta (% Change/Difference), Mix, and Average Per Time Period

You can add these columns for any of the available measures by placing your cursor over the heading, clicking the drop-down arrow, and selecting from the menu.
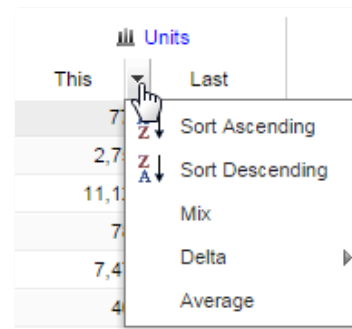
Move columns

Drag and drop a column heading to the new location.

Choosing the Context

Depending on your user rights and the dashboard configuration, you may be able to select the particular subset of data you are interested in and how that data is grouped.

Workspace Filters:

Workspace filters are interactive menus that you can use to filter the data in the dashboard. These must be pre-built into the dashboard.
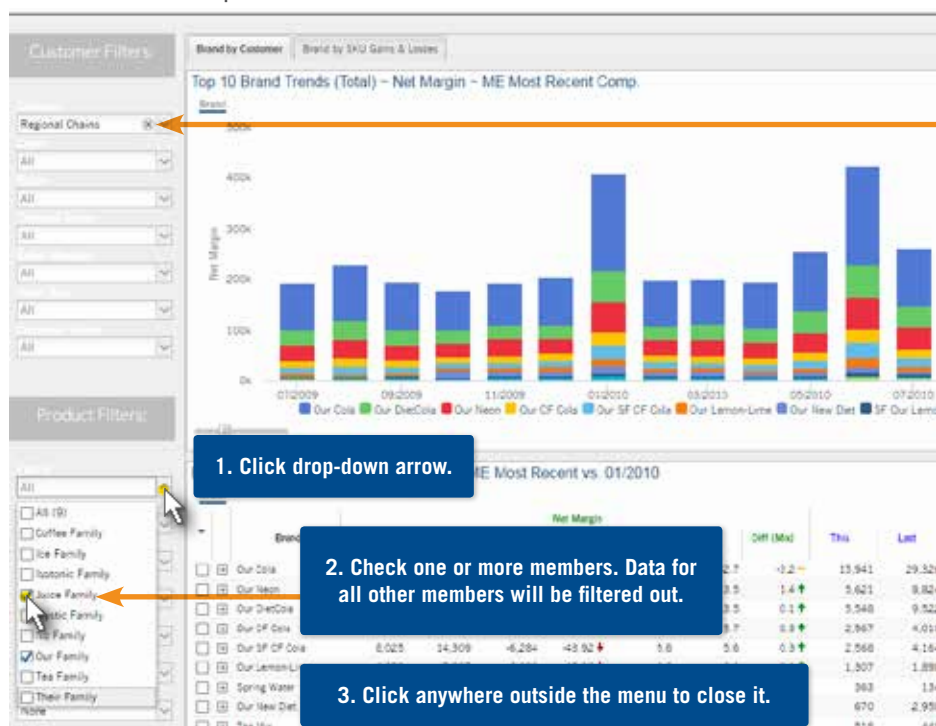
Tip: To quickly clear a filter (i.e., show data for All members), click the (x) button in the filter.

Tip: Viewer does not save your selections for the next time you view the dashboard unless you use the Share feature (see page 15); however, your administrator can enable "pre-filtering" based on your user name.

1. Click drop-down arrow.

2. Check one or more members. Data for all other members will be filtered out.

3. Click anywhere outside the menu to close it.

Additional Concepts:

By default workspace filters affect all widgets in the dashboard, but they can be disabled for a particular widget during dashboard building. To see which filters affect the data in a widget, place your cursor over the widget heading.

Click the filter heading to open a dialog rather than a menu to select the filter items. This allows you to search for a member and may be useful when the filter has a long list of members.

Choosing the Context Continued

Drilling down:

Drilling down takes you deeper into the underlying details for whichever item(s) you choose, walking through a logical hierarchy based on a preconfigured order. You can continue drilling down until you arrive at the necessary details.

To drill down:

> **Tip:** You can only drill in Viewer if drilling has been enabled for the widget or a custom drill-down has been pre-built into the dashboard.

1. Check the box(es) of the members or click on a single row (i.e., focus).

2. Click the Down Level button.

3. Select a drill option (if multiple members are selected).

Double-click

> **Tip:** You can also drill by double-clicking on an item.

After you have drilled:

The "drilled" view shows data for the selected member(s). The results depend on the following:

- **No custom drill-down** - Drilling down takes you to a filtered view within the same widget/dashboard. (Drill-down must be enabled for this option.)
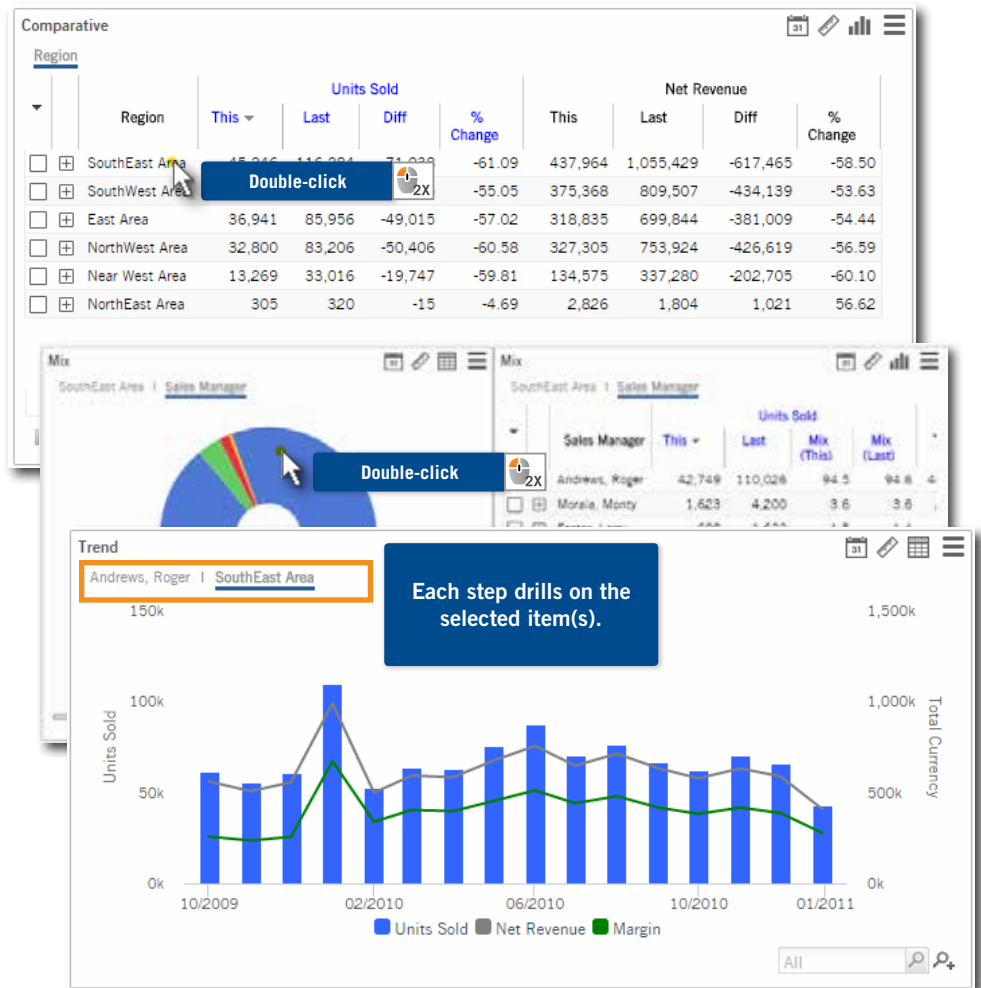
Choosing the Context Continued

- **Custom drill-down -**
  Drilling down takes you
  to the next dashboard or
  "step", which filters the
  data based on the selected
  members. The widget types,
  measures, and other settings
  can vary between "steps" in
  the drill-down process. (A
  custom drill-down must
  be pre-configured for this
  option.)

Collections

A widget may also be filtered by a
collection, which is a custom set of
members created by the dashboard
builder. Place your cursor over the
widget title bar to see if a collection is
filtering its data.

Choosing the Context Continued

## Selecting the attribute for grouping the data (By):

If you have Power Viewer licensing and drill-down is enabled, you can change the attribute used to group the data. This is also known as the "By" dimension.

1. Click the underlined attribute in the breadcrumb path.
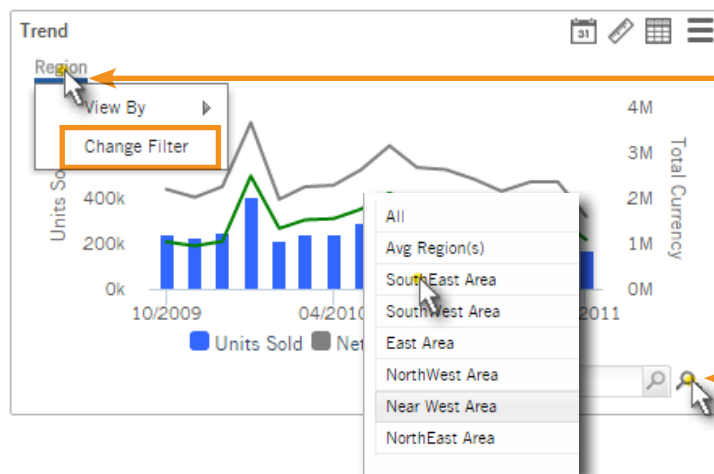
2. Select View By.

3. Select the attribute.

Tip: The available attributes may be limited by the dashboard designer.
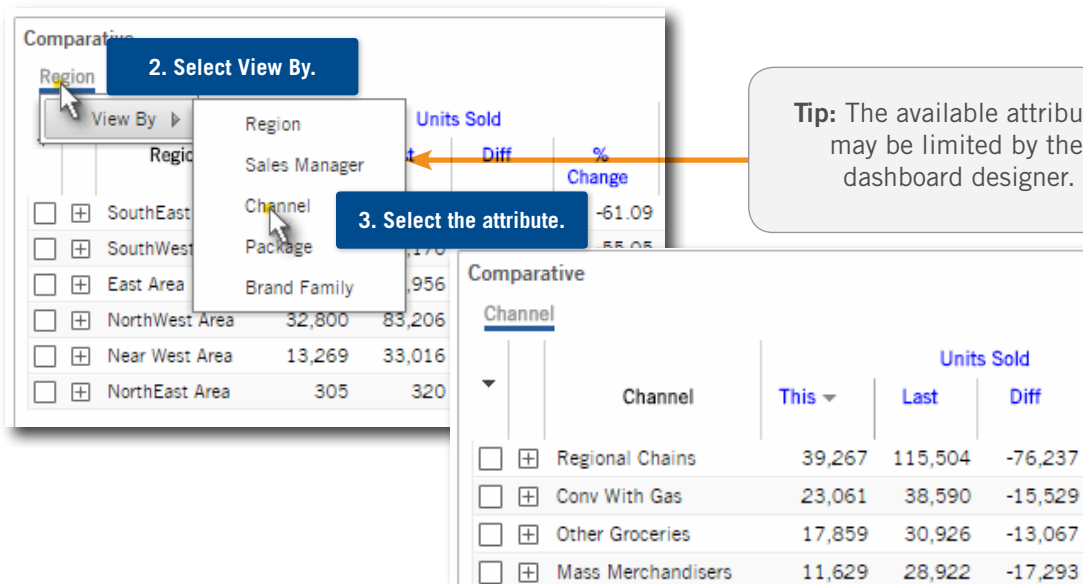
Select the focus/filter:

In widgets that show data for the focus only (e.g., Trend, Waterfall, Comparative Time Series, etc.), you can select a focus item to filter out data for all other items. This option does not filter data in widgets that compare members.

If you have Power Viewer licensing:

1. Click the underlined attribute in the breadcrumb path.

2. Select Change Filter.

3. Select an item from the dialog, or select All/Avg to see data for all members (i.e., remove filter).

If you do not have Power Viewer licensing:

1. Click the Search Plus button at the bottom of the widget.

2. Select an item from the dialog.

Choosing the Context Continued

Expand:

If drill-down is enabled, you can expand an item(s) to see its data by a secondary attribute (for example, SouthEast area's data by sales manager). To expand an item, click the plus ⊞ button.

	SouthEast Area	45,246	116,284	-71,038	-61.09
	Sales Manager - 4 of 4				
	Andrews, Roger	42,749	110,026	-67,277	-61.15
	Morala, Monty	1,623	4,200	-2,577	-61.36
	Foster, Larry	698	1,622	-924	-56.97
	Walter, Fred	176	436	-260	-59.63

Change the order/sort:

You can sort by a column to change the order. Place your cursor over the column heading, click the drop-down arrow, and select a sort option.

Brand	This ▾	▾	Last	Diff	%
⊞ Our Cola	37.		Sort Ascending		
⊞ Our Neon	16.		Sort Descending		
⊞ Our DietCola	12.		Delta ▸		
⊞ Our Lemon-Lime	3.62	3.48	0.14		
⊞ Our SF CF Cola	3.44	4.17	-0.73		

🗮 Units Mix

View subtotals/check:

Checkmark a custom set of items you are interested it. In a comparative widget, the subtotals appear at the bottom.

	Our SF CF Cola	5,804	10,312
	Our CF Cola	5,629	10,204
	Cups	5,137	5,374
	Tea Mix	3,107	1,736
	Mystic Water	2,473	1,036
	Hires Root Beer	2,255	2,808
	Our New Diet	1,868	6,424
	Checked (3)	28,627	49,492
	Unchecked (79)	140,019	197,862
	Total (82)	168,646	247,354

Search:

To perform a regular search for an item by name, type the name in the lower-right corner and click 🔍. Or, to perform an advanced search by name or code, click the 🔍₊ button.

2LTR-8NDPunch	118	300	-182
5gBibLclOur Neon	115	132	-17
9.5 4X6 Coffee	105	116	-11
2LTR-8PALmn-Lime	104	366	-262
24OZ PA Our DietCola	103	230	-127
Total (215)	131,660	226,110	-94,450

Page 1 of 3 ▸ ▸| Orange 🔍 🔍₊

Selecting the Time Frame

Change the date range

Each widget starts out with a default timeframe set by the dashboard designer. You can change the timeframe if the date setup icon is enabled for the widget.

1. Click the date control.

Tip: The widget title bar may show the currently selected dates. You can also place your curor over the title bar to see the dates.

2. Select from available date options.

Set the resolution (days, weeks, months, etc.)

Filter on certain days *(if applicable).*

Select a period to compare against.

Choose Most Recent or Most Recent Complete to use the most recent or most recent complete data available.

Set the date range (starting date/ending date).

Tips:

A year to date (YTD) option is available for months and periods.

If the month you are comparing isn't complete, the Calendar Days option allows you to compare the time period to an equivalent number of days during the same period (e.g., 15 days during this month versus 15 days last month.)

3. Click OK.

Selecting the Time Frame

End Date Selector

If the dashboard has an end date selector, you can to shift the end date of all widgets simultaneously without changing the resolution or number of dates in the widgets.

Additional Concepts:

1. If a dashboard has an end date selector and a Viewer date setup icon, then changing the date via the icon temporarily disables the end date selector.

2. By default, an end date selector affects all widgets in the dashboard; however, the dashboard builder can turn an end date selector off for a widget. To see if a date selector affects a widget, place your cursor over the widget title bar.

Customizing Widgets

Toggle between numbers and graph

Click the numbers or graph button to switch back and forth between these formats.
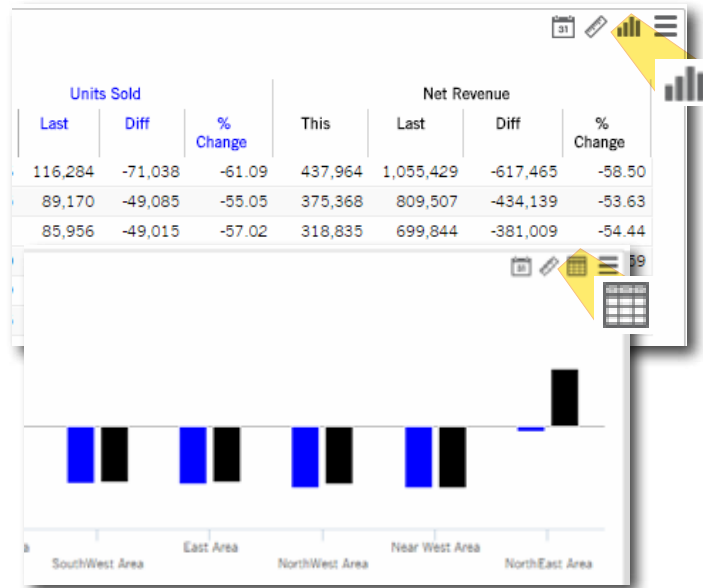
Graph formats

Some types of graphs have multiple format choices. Click the settings button and select from the available options.

Stacked Area Chart
Line Chart
Stacked Bar Chart
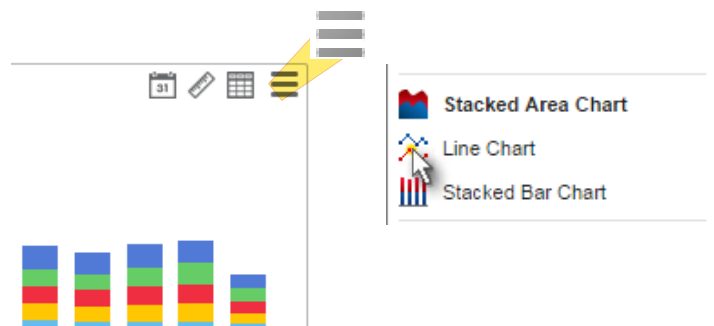
Other options

Other options on the settings menu may include: actual value or percent change; data for this date range, last date range, or both; vertical or horizontal, and more.

Maximize
Export
Compare By Sort Order
Show Percent Change
Show Actual Value
This and Last
This Only
Last Only
Vertical
Horizontal
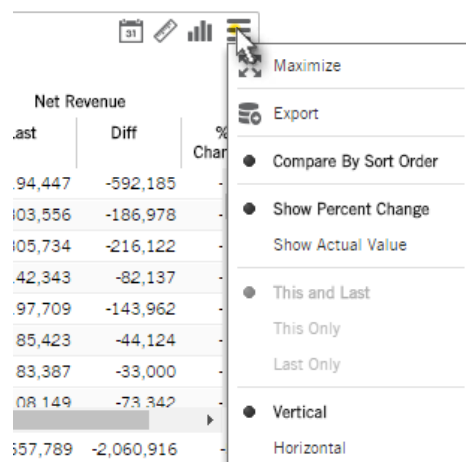
Sharing Information

Share URL

You can make changes in a dashboard and then share the URL (see below) to save, share, and re-use common selections.

1. Make selections in the dashboard (select from filters, change the date, select a format, select measures, drill, etc.).

2. Click the Share button.

3. Save the resulting URL and, optionally, share it with other users. When you open this URL, your selections will be pre-loaded.

Tip: The URL will be discarded after a number of days of inactivity (set by your administrator).

Sharing Information Continued

Export

You can export the data from a widget to a Microsoft Excel®, comma-separated (CSV), or UXT-compatible file. This cabability can be disabled or limited by the dashboard designer. Note that exporting a graph to an Excel or CSV file exports the underlying data but not the graph itself.

1. Click the settings button.

2. Select Export.
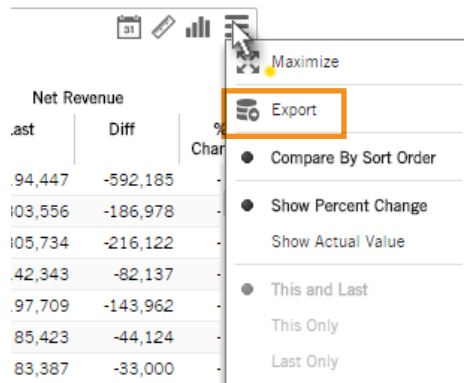
3. Select a file format. (This option may be disabled.)
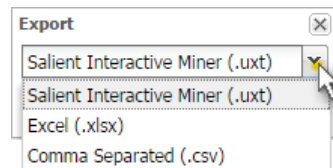
4. For Excel or CSV files, you may have additional options for exporting members of the secondary dimension used for grouping the data (for example, packages within each brand).

Sharing Information Continued

Knowledge Manager

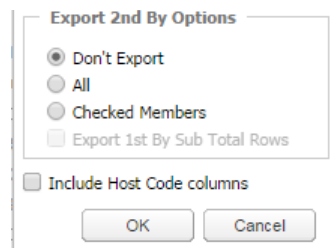Enables users to organize thoughts or "soft knowledge" for collaboration. If installed with a SIM/SDM setup, the information is sharable between SDM, Dashboard Viewer, and SIM. Several configuration steps and security rights are required.

To open Knowledge Manager:
Click the Knowledge Manager bar on the right side of Dashboard Viewer. Three panels are available.

Dashboard Info – includes the description, resource, and comments for a dashboard.

Member Info – allows you to connect information to specific customers, brands, products, regions, sales representative, assets, etc. Select the member in a widget to view or add information.

General Info – contains global information relevant to multiple dashboards as well as a search feature.
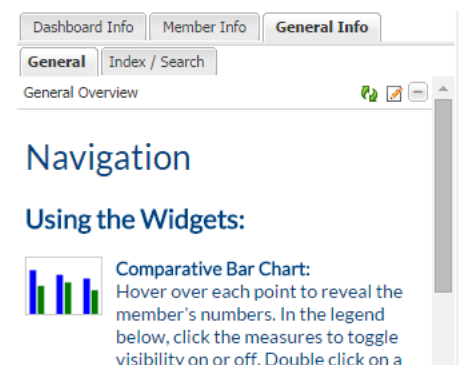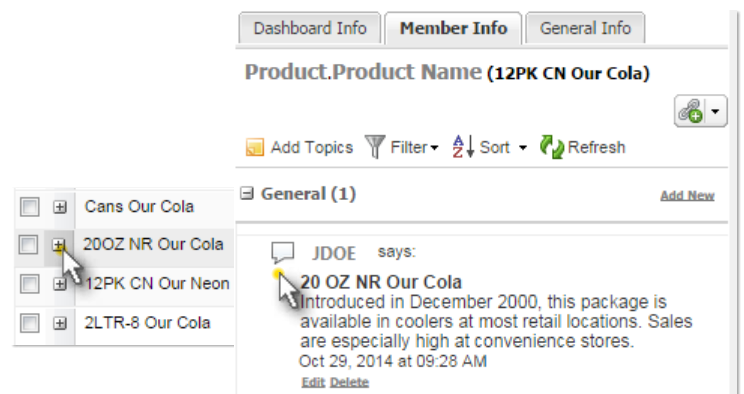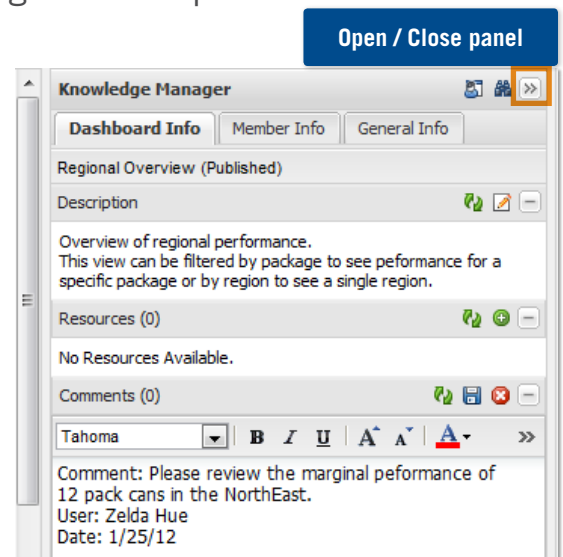
Widget Types

Widget types are preconfigured in each dashboard, but you can switch between numbers and graphs and select from various formats (see page 14).

Comparative

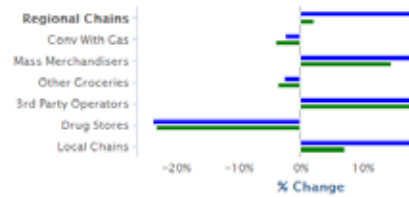**A summary view that compares multiple groupings between two different timeframes.**

Example:

Compare volume and margin for current year vs. prior year.

Clustered/Grouped Bar Graph (Actual Value or % Change)

Numbers View

Tips:

- To switch between actual values and % change, click the Options button.

- Clustered or overlapping bar graphs are pre-selected by the dashboard designer and cannot be switched in Viewer.
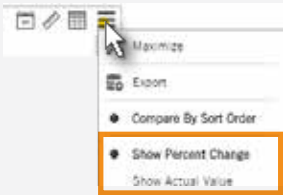
Overlapping Bar Graph (Actual Value or % Change)

Crosstab

A comparison grid that organizes data by two different attributes at once.

Example:

View revenue by package and brand.

Numbers View

Widget Types continued

Multicomparative-2

A summary view that includes two time comparisons: current month vs. the same month last year and year to date (YTD) vs. a year ago.

Example:

Compare volume and margin for current month and year vs. prior year.

Numbers View

Comparative Time Series

Displays performance trends for multiple time periods.

Example:

Compare volume and margin for current year vs. prior year.

Actual Values (This and Last)

Numbers View

Percent Change

Trend

Displays performance trends for multiple metrics over a range of dates.

Example:

Volume, net revenue, and margin trends for an account by a specific product group.

Graph
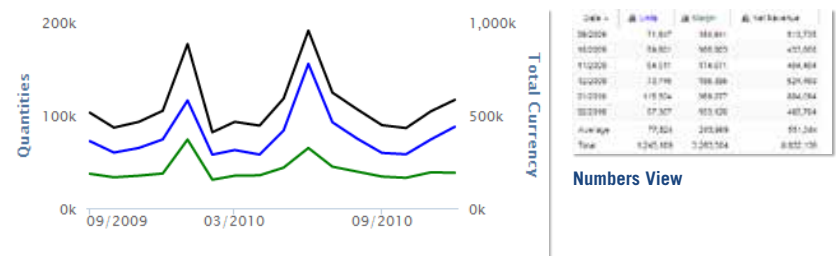
Numbers View

Widget Types continued

Share Trend

Compares performance trends for multiple members.

Example:

Identify cannibalization within a product category.

Stacked Area (Total)

Numbers View

Stacked Area (Percent)

Stacked Bar

Line
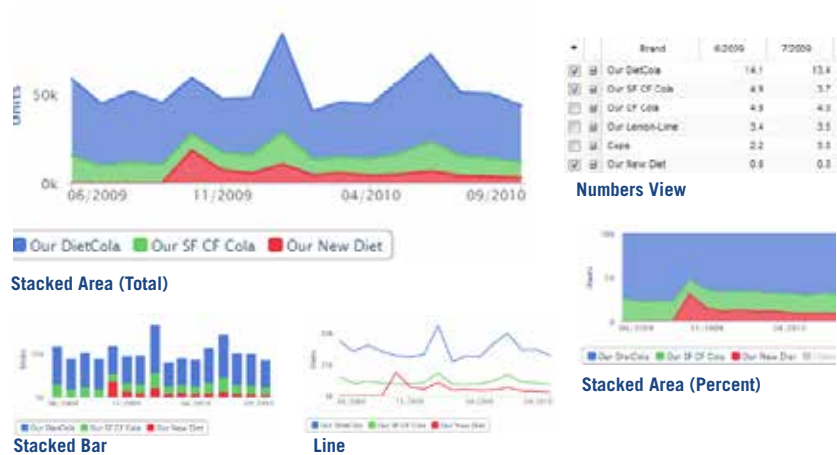
Scattergram

Displays a matrix of any two measures to find outliers (e.g. customers).

Example:

Perform volume vs. price relationship comparison for all customers who purchased a product.

Graph

Numbers View

Tip: You can click and drag to list out points (e.g., customers).
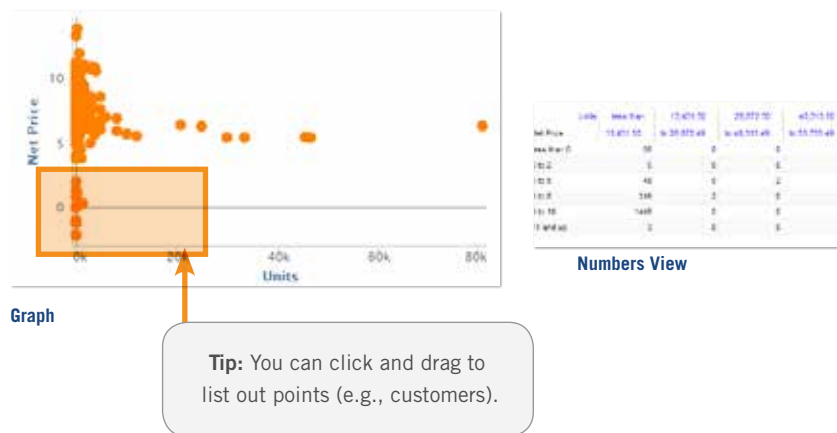
Mix

Displays comparable share performance.

Example:

Regional contribution to total volume.
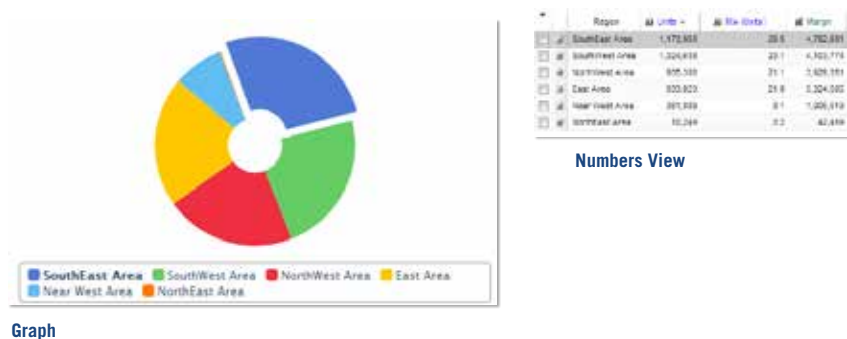
Graph

Numbers View

Widget Types continued

Exception Time Series

Displays trends of pass/fail tests (e.g. number of passing customers).

Example:

Customers buying a new product.

Numbers View

Graph

Exception

Display pass/fail information based on user-defined criteria.

Example:

Customer buy/no buy activity.

Numbers View

Graph

Waterfall

Displays a matrix of measures and their change for any two time periods or compared to budgets.

Example:

Chain store P&L activity detail.

Numbers View

Actual Value

Difference

Widget Types continued

Gauge

Displays a visual indicator of the percent change or value.

Example:

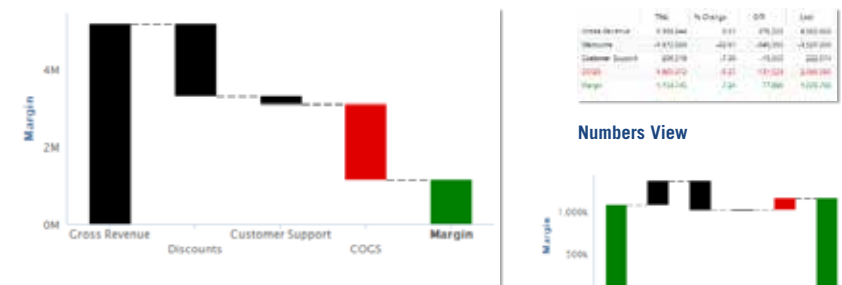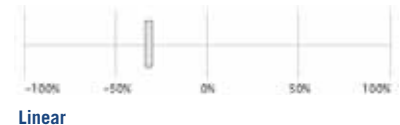Percent change in volume since last year.

Speedometer

Numbers View

Linear

Tab Group

Provides a tabbed or carousel view of multiple groups of widgets within a dashboard. Switch between widgets by clicking on tabs or arrow buttons. Also see tab groups versus independent tabs (below).

Example:

Daily, weekly, and monthly data.

Tab

Carousel

Tab groups versus independent tabs (i.e., dashboard deck)

Tabs may be part of a single dashboard (above) or represent separate, independent dashboards in a dashboard deck. It is important to understand that selections in independent tabs do not affect other tabs or dashboards.

Tab groups within a dashboard

Selections affect multiple tabs within the dashboard.

Independent tabs (i.e. dashboard deck)

Lost Customers

Independent tabs are located above the dashboard toolbar. Selections in one tab do not affect another tab.
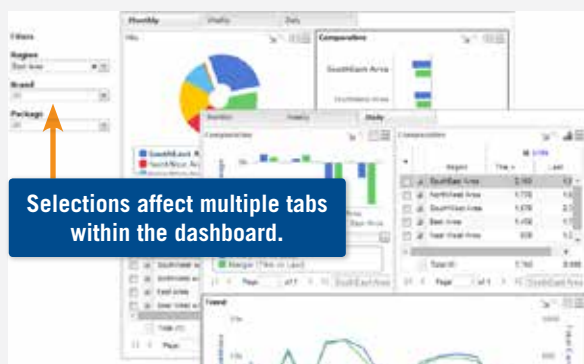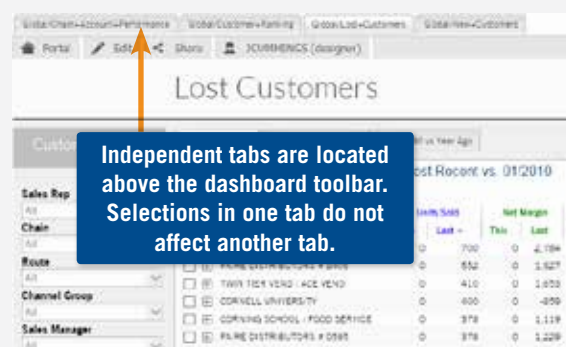
Salient
Continuous Improvement Suite

Data Mapping, Acquisition, Transformation and Loading:

Salient ETL™
Integration tool for database mapping

Choice of alternative ETL

Intelligence Processing:

Analytical Data Mart
Capable of scaling up to billions of records.

Desktop UIs:

Analytical Workstation
Advanced visual data mining application

Knowledge Manager
Collaboration hub for knowledge sharing.

Optional Add-ons:

Geo Analytics
Analyze geospatial data in Analytical Workstation

Salient360™
Excel plugin to connect to Analytical Data Mart

N-Tier UIs:

Salient Dashboards
Analytics on-the-go for quick consumption

About Salient

Salient Management Company offers business and government a new solution for efficient management. Drawing on diverse data from multiple sources, Salient technology measures how business activity creates value, quality, financial efficiency, and productivity, while the user interface eliminates barriers to using this knowledge for continuous process improvement.

Salient is a worldwide provider of advanced performance management and decision support systems for a wide range of industries and the public sector. Founded in 1986, Salient today serves more than 115,000 users in 61 countries.

For more information, visit www.salient.com.

SALIENT® MANAGEMENT COMPANY