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.

Salient Dashboard Designer enables your team to create interactive consolidated visualizations of decision support intelligence, in a browser for consumption from any computer or mobile device. The following document will guide you through the basics of setting up a dashboard to answer any question and then sharing it with other users.

Performance metrics, decision support facts, gain & loss indicators and more.

Collaborative intelligence and soft knowledge about the dashboard (comments, files, etc.)

Salient Dashboard Designer
Logging In and Using the Portal

Getting Started:

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.

Browser Compatibility: Salient recommends Google Chrome™.

Additional Concepts:

In the portal, click Explore Dashboards or Dashboards/All to see all published dashboards organized by folder.

When viewing a dashboard, the Edit button opens that dashboard in Dashboard Designer so you can edit it (user account must have rights to Dashboard Designer).

Tip: You can change or add a message in the General Info area of Knowledge Manager.

From the portal, access the building application by selecting “Build” (requires user account rights to Dashboard Designer).
Getting Started:
The Designer Screen

Initially, the builder may open to a blank canvas. Follow the next steps to create your first dashboard. We recommend saving a carefully designed dashboard as the “Home” view (see page 22) to easily use it as a template for additional dashboards.

Dashboard Viewer vs. Power Viewer

Dashboard Viewer and Power Viewer are both end-user, browser-based applications that let viewers log in, view, and interact with published dashboards. However, only users with Power Viewer licensing can do the following:

- Select measures (see Page 8).
- Use the breadcrumb path to change the attribute for grouping the data (see Page 11).

In this document, Dashboard Viewer and Power Viewer users will be referred to as Viewers unless specified otherwise.
Getting Started in 6 easy steps

1. Add Widgets
2. Add Measures
3. Choose the Context
4. Select the Time Frame
5. Customize
6. Save and Share

Most managers have a specific business situation that they want to address when they create or use a dashboard. By following these 6 logical steps, you will quickly and easily be able to create and share a custom dashboard with the exact information that you need.

Before Adding Widgets

Customize the workspace

We recommend that you select a data cube for the workspace before adding widgets, because workspace filters will only show data within this cube's date range (see Page 14). In addition, a new widget will use settings of the last selected workspace or widget. Therefore, you may want to select commonly-used settings, such as timeframe and context, for the workspace in orderly to easily apply those settings to new widgets.
1 Add Widgets

**Add widgets:**
Make your widget selection based on the kind of question you have in mind.
See explanations of each widget type starting on page 25.

Additional Concepts:
To switch between numbers and graph formats, click the numbers or graph button on the widget title bar (not available in all widget types).

To select from the available numbers grid formats (standard, swapped, etc.), click the options button, select Settings, and then go to Numbers Grid settings.

The options button on the widget title bar also lets you select from available graph options.
2 Add Measures

Option 1: Measures tree

1. Click the Setup Widget button, or click the options button and select Settings.

2. Go to Measures settings.

3. Check the boxes of the measures to show.

Tip: The measure settings let you create groupings of measures and change the display name of a measure.

Option 2: Measures settings

1. Click the Setup Widget button, or click the options button and select Settings.

2. Go to Measures settings.

3. Check the boxes of the measures to show.

Tip: The measure settings let you create groupings of measures and change the display name of a measure.
Show/hide measures:
You can select the default measures to show when the viewer opens the dashboard (i.e., hide all other measures). For example, you might add several measures and then show only a few “start-up” measures. Power Viewer users will be able to change the measures shown (see below).

Measure selection in Power Viewer:
Power Viewer users can show or hide any of the measures that have been added to the widget.

Dashboard Viewers without Power Viewer licensing do not have this capability.
2 Add Measures Continued

Additional Concepts:

If you don't see the desired measure in the Measures tree or Measures settings, you may need to change the data cube using the drop-down menu in the Context area. The timeframe and other aspects of the Context (see Step 3) may also affect the available measures.

To delete or hide a measure, click on the measure in the legend and select an option. This is not allowed in all widgets.

To hide a measure in the corresponding graph, place your cursor over the column header and click the toggle button that appears.

To delete a measure column, add percent change and difference (i.e. Delta), add mix, highlight, or sort, click on the column drop-down arrow and select the desired option.

For widgets that only show one or two measures at a time, you can drag a new measure onto the widget to replace the previous one.
3 Choose the Context

You can choose the context to select the particular subset of data you are interested in and how that data is grouped.

Select how to group the data.

**Group By:**
The By (1st By) dimension controls the groupings shown.
The 2nd By is what one would see next when expanding an item or drilling down.

For example, data is grouped By chain with the ability to expand any chain to see brand/families within it.
**3 Choose the Context**  

**Option 1 for choosing the By: Context bar**

1. Click the widget title to select it.
2. Click the button in the Context area.
3. Select the attribute from menus.

**Option 2 for choosing the By: Breadcrumb path**

**Changing the By in Viewer**

Viewers can change the By using the breadcrumb path if drill-down is enabled (see instructions on Page 13) and they have Power Viewer licensing.

Tip: The available attributes are limited to those for which drill down is enabled.
3 Choose the Context Continued

Drilling down within a dashboard
Narrow down to the exact piece of information needed within a widget/dashboard.

The “drilled” view shows data for the selected member(s) grouped according to what was previously the 2nd By. The widget type, format, measures, etc., remain the same.

Custom drill-downs
See “Advanced Concepts” for information about custom drill-downs, which allow users to drill to through dashboards that utilize different pre-configured settings, such as widget type, measures, sort order, date settings, etc.
3 Choose the Context

Enabling drill-down (within a single dashboard) and By selection for Viewers

1. Click the Options button
2. Select Downlevel Order
3. Check Use custom order
4. Check the boxes of the attributes for which to allow drilling and By selection (By selection also requires Power Viewer licensing).
5. Create a rational drill hierarchy for Viewers by clicking and dragging to arrange the order of dimensions in the list.

Tip: Drill-down does not need to be enabled for custom drill-downs (see Page 32) to function in Viewer.

Drilling down in Dashboard Viewer/Power Viewer

If a custom drill-down is enabled, drilling using any of the following methods takes the viewer to the next dashboard in the drill-down. Otherwise, drilling takes the viewer to a filtered view within the same dashboard. Drill-down must be enabled (see above) for users to be able to drill within a dashboard.

Option 1: Double-click on the item.
Option 2: Select an item(s) and click the drill-down button.
Option 3: Select an item(s) and click the breadcrumb path.
3 Choose the Context  Continued

**Workspace Filters:**
Provides interactive filters so that Viewers can very easily filter the data from a number of common selections you choose to provide them. By default, the filter selections affect all the widgets in the dashboard.

**To add workspace filters:**
1. Click the 1st By button in the Context area.
2. Select the attribute and drag it onto the workspace to create the workspace filter.
3. Repeat to add more filters.

**Additional Concepts:**
In Other Settings, you can enable or disable workspace filters for any widget.

Place your cursor over the widget's title bar to see which workspace filters affect it.

A workspace filter only lists members within its automatically assigned date range, which includes dates between the earliest and latest dates of all of the dashboard's widgets and within the date range of the workspace's data cube (see Page 5).
3 Choose the Context  Continued

Sort:
The dashboard will “remember” your sort after saving, and display members in that order; therefore, we recommend setting a rational ranking before saving.

Focus:
The focus is the grouping or “member” you are focused on and ready to drill down into.

The following widgets compare the focus to other groupings: Comparative, Share Trend, Mix, Exception. These types of widgets reset to the first member (based on the sort) when opening a saved dashboard.

The following widgets aggregate data for all members, show the average of all members, or only show the focus member (i.e. filter out all others), depending on the option selected: Comparative Time Series, Trend, Scattergram, Exception Time Series, and Gauge. These types of widgets remember and open to the focus member(s).

When building trend and other widgets that do not compare multiple members at once, we recommend choosing “All” from the focus area; therefore, giving the Viewer control of the data shown via workspace filters.
3 Choose the Context

Collections:
Let you lock the content down to show data for customized sets of members. Create your own collections in Dashboard Designer and/or use global collections created in SIM.

Modify or create collections:

1. Open the Collections area.

2. Select the key/attribute and type of collection (global or a global category are recommended). Global SIM collections are also available in this area.

3. Click Actions > Add > Collection to create a new collection.

4. Add items to the collection, assign a name, and click OK.

Filter the data in a widget by a collection:

1. Click the widget title to select it.

2. Open the collections area and select the collection.

3. Drag and drop the collection onto the widget.

Collections in Viewer
Users cannot change collections, but can place their cursor over the widget title bar to see which collections are on.

Filter the data in multiple filters and widgets by a collection.
Perform the same steps as above but apply the collection to a workspace filter.

All applicable workspace filters and widgets in the dashboard will use the collection as a filter.
4 Select the Time Frame

Select the default time frame for each widget.
Choose a date range to display when the Viewers first open the dashboard. By default, Viewers will be able to change the date range if they wish as discussed on the next page, but a “starting point” provides a commonly used date range that updates nightly.

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 update automatically. The Fixed option will not update the date range when new data is 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).
A common selection is YTD versus year ago (YAG) with calendar days chosen and the most recent timeframe for nightly updating.
Enabling and disabling date selections in Viewer

By default, the Viewer can change the date of each widget using a date icon and the Date Setup area. If you wish, you can turn off this capability for any widget.

To enable/disable the setup date icon for Viewers:

1. Open the options menu and select Settings.

2. Click the Other Settings tab.

3. Turn on or off the Show Date Setup Icon setting.

Date setup in Viewer

If the date setup icon is enabled:

The Viewer can click the button to access a variety of date range options for the widget.

Additional Concept:

An end date selector is another option for allowing the Viewer to select or "shift" the dates of widgets in the dashboard. See “Advanced Concepts” for more information.
5 Customize

Widget options menu
Click the options button to open a menu that allows you to change the format, allow drill-down, export, and more.

Widget settings
On the options menu, select Settings and then select a tab: Measures, Numbers Grid, Graph, or Other Settings. (See Page 7 for information on Measures settings.)

Other Settings: Change the widget title, enable/disable exporting, enable/disable date selection, turn on/off workspace filters, and more.
Widget settings (continued)

Numbers Grid Settings: Select a layout for a numbers grid. For example, swap rows and columns. Available options depend on the type of widget.

Graph Settings: Customize the lines, bars, etc. in the graph by changing their colors, thickness, style, and more. Turn on data labels. You can also add reference lines as explained in “Advanced Concepts.”
5 Customize Continued

Dashboard title
Optionally, add a content widget to show a dashboard title or description.

Dashboard settings
Click the dashboard settings button to change settings for the entire dashboard.

User preferences
Click the user name at the top of Dashboard Designer and select User Settings.
6 Save and Share

Save and publish dashboards to allow Viewers to access them.

Save and publish a dashboard
You can save and publish a dashboard in one step. Only published dashboards are available to Viewers.

Set the Home view
We recommend saving a carefully designed dashboard as the “Home” view so that you can easily use it as a template for additional dashboards.
6 Save & Share Continued

Share the URL of the published dashboard

How Viewers can access published dashboards

Go to URL
Viewers can go directly to the URL that you provide (see information on left) in order to view a specific dashboard.

Access from portal
Dashboards are automatically available to viewers in the portal as soon as you publish them (depending on user rights).

Dashboards menu
Dashboard viewers can navigate to published dashboards using the dashboards menu. This menu is located at the top of the viewer (if enabled in the dashboard’s settings).

Salient Mobile app
Salient Mobile is a mobile app that optimizes viewing of published dashboards on touch-enabled mobile devices.

Tip: It is important to use this hyperlink for any manually linked directory pages; the landing page after the page loads will display a different address that is not the true address of the dashboard.
6 Save & Share Continued

Additional Concepts:

Share multiple dashboards in a deck (see Independent tabs in Advanced Concepts).

Create a custom portal
Use content widgets to create custom links to the desired dashboards using the HTML editor.

Salient Mobile app
The Salient Mobile app must be installed separately. Contact Salient Management for more information. Once installed, Salient Mobile provides access to all published dashboards in a mobile app that is optimized for viewing on touch devices.
Widget Types

Comparative

A summary view that compares multiple groupings, showing percent change versus a previous timeframe or actual values.

Example:
Compare volume, revenue, and margin for current year vs. prior year.

Tips:
- To switch between actual values and % change, click the Options button.
- To turn on an overlapping bar graph, open the Graph Settings and clear the Enable Column Grouping box.
- Then, adjust the bar widths so that the top bar is the thinnest.

Crosstab

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

Example:
View revenue by package and brand.

<table>
<thead>
<tr>
<th>Package</th>
<th>Our Cola</th>
<th>Our Neon</th>
<th>Our DietCola</th>
</tr>
</thead>
<tbody>
<tr>
<td>12Pk Cn</td>
<td>35,190</td>
<td>9,741</td>
<td>10,886</td>
</tr>
<tr>
<td>2Ltr-S</td>
<td>19,383</td>
<td>5,708</td>
<td>5,047</td>
</tr>
<tr>
<td>6Pk Cn</td>
<td>16,179</td>
<td>6,480</td>
<td>6,714</td>
</tr>
<tr>
<td>200z NfR</td>
<td>9,950</td>
<td>6,096</td>
<td>2,971</td>
</tr>
<tr>
<td>16PNSB</td>
<td>8,152</td>
<td>2,374</td>
<td>3,036</td>
</tr>
<tr>
<td>24oz NfR</td>
<td>5,089</td>
<td>1,494</td>
<td>2,186</td>
</tr>
<tr>
<td>2Ltr-SPa</td>
<td>3,283</td>
<td>1,185</td>
<td>1,052</td>
</tr>
</tbody>
</table>

Numbers View
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.

Comparative Time Series

Displays performance trends for multiple time periods.

Example:

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

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.
**Share Trend**

Compares performance trends for multiple members.

Example:
Identify cannibalization within a product category.

**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.

**Mix**

Displays comparable share performance.

Example:
Regional contribution to total volume.
Exception Time Series

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

Example:
Customers buying a new product.

Exception

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

Example:
Customer buy/no buy activity.

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.
**Content**

Lets you add titles, links, descriptions, embedded web content and more to a dashboard.

Example:
Add a dashboard portal to link to various related dashboards.

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**Image**

Add an image by uploading or selecting from a corporate image library.

Example:
Add a custom logo to a dashboard.

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**Gauge**

Displays a visual indicator of the percent change or value.

Example:
Percent change in volume since last year.

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**Tab Group**

Provides a tabbed or carousel view of multiple groups of widgets within a dashboard, therefore, maximizing the use of screen space. See the following Advanced Concepts for more information.

Example:
Add tabs to show daily, weekly, and monthly data.
Advanced Concepts

Reference lines
You can add custom or calculated reference lines to enhance graphs.

1. Click the options button and select Settings.
2. Go to Graph settings.
3. Click on Custom Reference Line or Calculated Reference Line and select options.

Custom reference lines: Show when data is above or below a threshold value or indicate important dates.

Calculated reference lines: Compare data to averages or totals; show cumulative results or moving averages/ totals; make projections into the future.
Advanced Concepts

**Highlighting**
You can highlight data that falls above or below any threshold.

**In numbers:**

<table>
<thead>
<tr>
<th>Channel</th>
<th>This</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Chains</td>
<td>57,783</td>
<td>-3.05</td>
</tr>
<tr>
<td>Conv With Gas</td>
<td>25,842</td>
<td>-6.38</td>
</tr>
<tr>
<td>Mass Merchandisers</td>
<td>21,347</td>
<td>-35.64</td>
</tr>
<tr>
<td>Other Groceries</td>
<td>21,144</td>
<td>-8.13</td>
</tr>
<tr>
<td>3rd Party Operators</td>
<td>19,111</td>
<td>52.73</td>
</tr>
</tbody>
</table>

1. Click the arrow in the column heading and select Highlight Column.
2. Enable highlighting, enter criteria, and select a style.

**In graphs:**

1. Switch to numbers and turn on highlighting as explained on the left.
2. Switch back to graph.
3. On the options menu, select Settings.
4. In Graph settings, click the color control for the column and check the Use Highlight Settings box.
Advanced Concepts

Creating a custom drill-down (i.e., storyboard)
You can create a custom drill down to allow users to easily drill through a set of pre-configured views to find the exact information needed.

1. Create, configure, and publish each dashboard or “step” in the drill-down.
   i. Add and configure widgets.
   ii. Save and publish dashboard.
   Tip: You do not need to add filters; data will automatically be filtered as the user drills.
   iii. Repeat for all dashboards in the drill-down.

2. Enable custom drill-down and select next step for each dashboard.
   i. Open the dashboard or “step.”
   ii. In Other Settings, enable Custom Drill Down and select the next dashboard or “step” in the drill-down (repeat for each widget from which drill-down should be allowed).
   iii. Save/publish changes.
   iv. Repeat for all dashboards in the drill-down except the last step.
Advanced Concepts

Using a custom drill-down (in Viewer or Builder)
Once a custom drill-down has been created, users can drill down through the pre-configured steps in Viewer or Builder by double-clicking (or using other drill methods) on the items in which they are interested.
Tab groups versus independent tabs (i.e., dashboard deck)
Two different options are available to provide a tabbed view of widgets to the user. Either method maximizes the use of screen space by allowing the user to switch between tabs to view widgets.

Tab groups (recommended method):
Multiple tabs are part of the same dashboard; therefore, workspace filters, date selectors, etc., located in the dashboard can affect multiple tabs at once. In addition, this feature offers a tab format or carousel format. The carousel format allows the user to switch between views by clicking arrows.

To add a tab group:

1. Drag and drop Tab Group onto workspace.
2. Click Options button to add or rename tabs.
3. Drag widgets onto tabs and configure as desired.
4. Select Settings to change format (tab or carousel) if desired.

Tip: Click the settings button to access format options.
Independent tabs (i.e., dashboard deck)
Each tab is a different dashboard; therefore, they operate independently and a filter in one tab does not affect other tabs.

To add a build a dashboard deck:

1. Under Actions, select Build Deck.
2. Add the desired dashboards (only published dashboards are available).
3. Copy and share the URL. It is important to use this hyperlink for any manually linked directory pages; the landing page after the page loads will display a different address that is not the true address of the dashboard.
Advanced Concepts

Turning off or limiting export options for Viewers
By default, Viewers can export the data from any widget to an Excel, comma-separated, or UXT-compatible file. If you wish, you can turn this capability off or limit the allowed formats.

To turn off or limit export options for all widgets in dashboard:

1. Click the Settings button.

2. Select the allowed format, None to turn off exporting, or Prompt to allow all formats.

To turn off export options for a single widget:

1. Click the Options button and select Settings.

2. In Other Settings, clear the Export option.
End Date Selector
An alternate method of allowing the Viewer to adjust the date is to add an end date selector. The end date selector allows the Viewer to shift the end date of all widgets simultaneously without changing the resolution or number of dates in the widgets.

To add a date selector:

1. Drag the date control onto the workspace.
2. After adding a date selector, click the date control to configure its settings.
3. From the Date Setup dialog, select the dates to use as choices for the end date (e.g. 12 months).

Additional Concepts:
1. An end date selector affects all widgets in the dashboard unless turned off in the widget properties.
2. 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.
**Knowledge Manager** enables users to organize thoughts or “soft knowledge” for collaboration.

If installed with a SIM/Dashboards setup, the information is sharable between dashboards and SIM. Several configuration steps and security rights are required before Knowledge Manager panels are available. Contact the Salient support desk for more information.

**Panel**
The panel is located on the right side of Dashboard Designer and Viewer.

Three tabs are available:

- **Dashboard Info** – includes the description, resource, and comments for a dashboard.
- **Member Info** – allows you to connect media or non-media information to specific customers, brands, products, regions, sales representatives, assets, etc.
- **General Info** – contains global information available to most users as well as a search feature.

**Measures Info**
View and enter information about Measures using controls in the Measures panel. The 📊 symbol indicates that a measure has associated information.

**Dashboard Info**
Dashboard descriptions can also be viewed and edited in the Dashboards area of the Toolkit.
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.