

Salient Dashboard Designer 6.x

Training Guide

Salient Dashboard Designer

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.



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: Logging In and Using the Portal

Browser Compatibility: Salient recommends Google Chrome™.

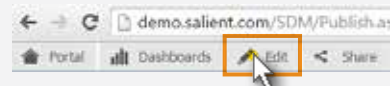
Your server can be set up with an address that is public or private. It can also be hosted by Salient or located within your preferred infrastructure location.

Additional Concepts:

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

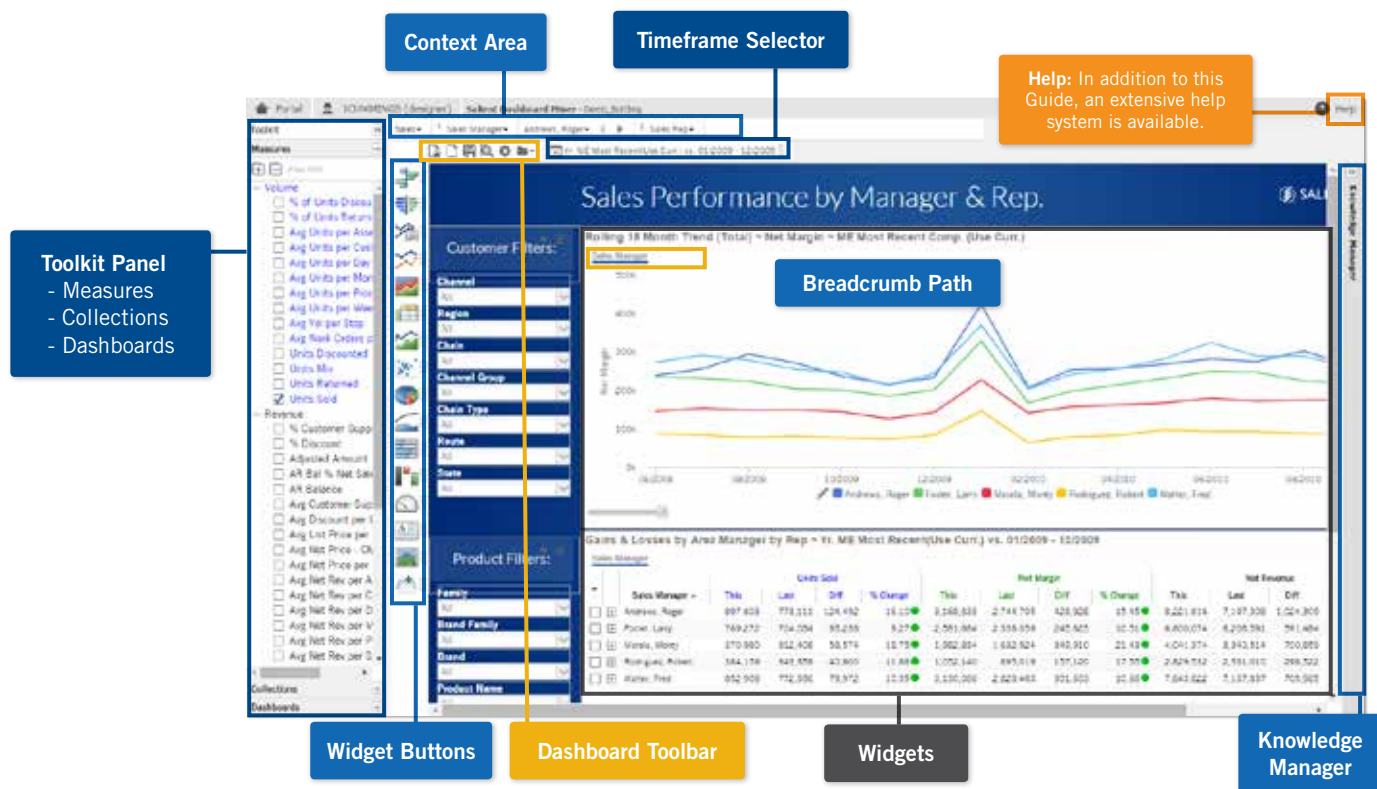


When viewing a dashboard, the Edit button opens that dashboard in Dashboard Designer so you can edit it (user account must have rights to Dashboard Designer).



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

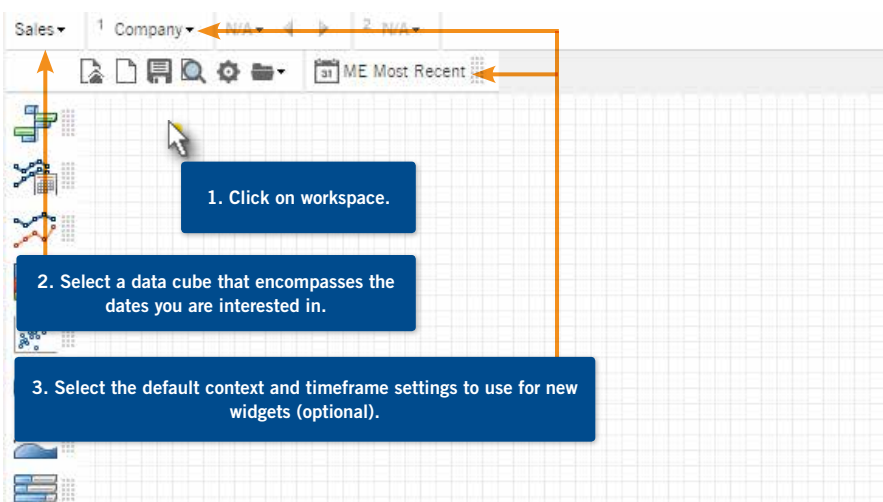
- 1 Add Widgets
- 2 Add Measures
- 3 Choose the Context
- 4 Select the Time Frame
- 5 Customize
- 6 Save and Share

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 order 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.

Comparative

Multi Comparative

Comparative Time Series

Trend

Share Trend

Crosstab

Margin Minder Trend

Scattergram

Mix

Exception Time Series

Exception

Waterfall

Gauge

Content

Image

Tab Group

1. Click on the workspace to select it. This causes the new widget to use the dates and other settings of the workspace.
2. Drag and drop from the widget toolbar onto the workspace.

The initial widget is typically empty. You will add measures in the next step.

Tip: You can change the widget type after you add it by clicking on the widget title bar and then clicking the buttons of the desired widget type.

Tip: Click the corner to resize a widget. Click the widget title and drag to move a widget.

3. Repeat to add more widgets and arrange as desired.

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.

The screenshot shows the 'Comparative' widget interface. At the top, there is a title bar with the word 'Comparative' and three icons: a left arrow, a right arrow, and a table icon. Below the title bar, there is a main content area. On the right side of the main content area, there is a vertical toolbar with three icons: a left arrow, a right arrow, and a bar chart icon. A context menu is open over the bar chart icon, showing the following options: 'Maximize', 'Close Widget', 'Settings', 'Stacked Area Chart', 'Line Chart', and 'Stacked Bar Chart'. The 'Settings' option is highlighted with an orange box. The 'Stacked Area Chart', 'Line Chart', and 'Stacked Bar Chart' options are grouped together in a separate box at the bottom of the menu.

2 Add Measures

Option 1: Measures tree

1. Click the widget to select it.

2. Open the measures area of the toolkit and then the desired data category.

3. Drag and drop the measures onto the widget, or checkmark the desired measures (checkboxes are not available in all widget types).

4. When checkmarking measures, click the green arrow button at the top of the Measures area to apply them to the widget.

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.

2 Add Measures Continued

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).

1. Click the Edit Measures button.

2. Check the boxes of measures to show; clear boxes of measures to hide. Only measures that have been added to the widget are available for selection.

Channel	Units Sold	Net Margin	Products Sold	Unit M
Regional Chains	936,354	1,669,056	263	
Conv With Gas	366,764	1,925,745	285	
Other Groceries	282,631	1,582,757	274	
Mass Merchandisers	266,535	719,842	195	
3rd Party Operators	195,915	625,193	212	
Drug Stores	178,170	508,047	218	
Local Chains	131,046	375,823	240	
Industrial	123,257	547,737	196	

Measure selection in Power Viewer:

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

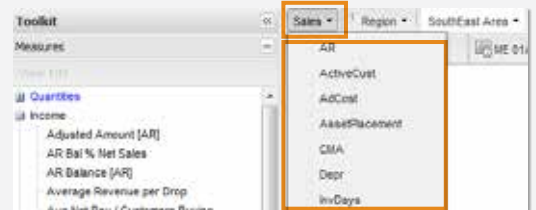
Dashboard Viewers without Power Viewer licensing do not have this capability.

This	Last
2,735,119	2,514,119
2,312,859	2,054,119
2,013,873	1,804,119
2,224,922	1,994,119
2,180,341	1,954,119

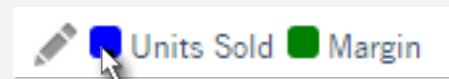
2 Add Measures Continued

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.



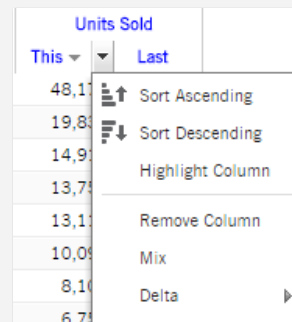
To delete or hide a measure, click on the measure in the legend and select an option. This is not allowed in all widgets.



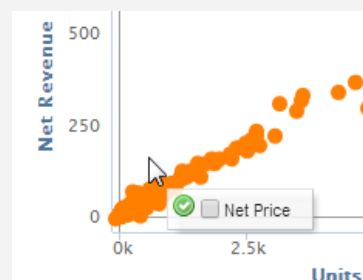
To hide a measure in the corresponding graph, place your cursor over the column header and click the toggle button that appears.



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.

Sales ▾ 1 Brand Family ▾ Colas ▾ 2 Customer Name ▾ Regional Chains ▾ Village North ▾

ME Most Recent

Context Area - view/change context for the currently selected widget.

Comparative

Regional Chains | Village North | Brand Family

	Brand Family	Units Sold ▾	Net
<input type="checkbox"/> +	Colas	6,256	
<input type="checkbox"/> +	Diet Colas	3,492	24,702
<input type="checkbox"/> +	Neons	1,593	12,143
<input type="checkbox"/> +	CSD Lemon - Lime	1,078	6,981

Breadcrumb Path - view/change context for an individual widget. Also available in Dashboard Viewer/Power Viewer with limited capabilities.

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.

1st By

2nd By

Sales ▾ 1 Chain ▾ All Others ▾ 2 Brand Family ▾

Chain

	Chain	Units Sold ▾	Net
<input type="checkbox"/> +	All Others	48,442	
<input type="checkbox"/> +	S.Newburg Dist-North	15,814	105,199
<input type="checkbox"/> +	Village North	14,120	100,705
<input type="checkbox"/> +	Obeck Inc. North	12,022	96,879

1st By

Brand Family - 12 of 12

	Colas	5,949	
	Diet Colas	2,495	
	Neons	1,682	14,703
	CSD Lemon - Lime	786	5,570
	Other CSD Flavors	433	3,101

2nd By

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

3 Choose the Context Continued

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.

Tip: You must use this method to select the 2nd By.

Region	This	Last
SouthEast Area	48,140	64,719
SouthWest Area	40,504	60,886
East Area	38,202	55,051
NorthWest Area	34,421	50,748
Near West Area	17,506	21,148
NorthEast Area	90	295

Option 2 for choosing the By: Breadcrumb path

Change 1st By

- Sales Manager
- Route Supervisor
- Sales Rep
- Route
- Channel
- Channel Group
- Channel Segment
- Chain

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.

Change 1st By

View By

Tip: The available attributes are limited to those for which drill down is enabled.

Region	This	Last
SouthEast		64,719
SouthWest		60,886
East Area		55,051
NorthWest Area	34,421	50,748

3 Choose the Context Continued

Drilling down within a dashboard

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

The screenshot shows a dashboard with a 'Comparative' widget. The breadcrumb path at the top is 'Sales > 1 Brand Family > Colas > 2 Route Supervisor > Regional Chains > Village North'. The widget displays a table of 'Units Sold' for various brand families. Three callout boxes provide drill-down options:

- Option 1: Double-click on the item.** Points to the 'Brand Family' header in the table.
- Option 2: Select an item(s) and click the drill-down button.** Points to the drill-down icon (a downward arrow) in the top right of the widget.
- Option 3: Select an item(s) and click the breadcrumb path.** Points to the 'Brand Family' breadcrumb in the top navigation bar.

	Brand Family	This	Last
<input type="checkbox"/>	Colas	6,256	5,240
<input type="checkbox"/>	Diet Colas	3,492	3,314
<input type="checkbox"/>	Neons	1,593	1,514
<input type="checkbox"/>	CSD Lemon - Lime	1,078	773

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.

The screenshot shows the 'drilled' view of the 'Comparative' widget. The breadcrumb path is 'Regional Chains > Village North > Colas > Route Supervisor'. The widget displays a table of 'Units Sold' for different route supervisors. A callout box indicates: 'Repeat to drill deeper into the next dimension in the downlevel order.'

	Route Supervisor	This	Last
<input type="checkbox"/>	Sportman, Phillip	3,740	2,781
<input type="checkbox"/>	Moriani, Peter	2,516	2,459

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 Continued

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.

Product Name	This	Last	Diff	% Change
12PK CN Our Cola	20,053	33,764	-13,711	-40.61
Cans Our Cola				27.36
20OZ NR Our Cola				5.41
12PK CN Our Neon	6,810	8,292	-1,482	-17.87
2LTR-8 Our Cola				3
16PNR8 Our Cola				
12PK CN Our DietCola				
Cans Our Neon				

Downlevel Order

☒ Use custom order

Viewer

☒ Product Name

☒ Family

☒ Brand Family

☒ Brand

Dimension

Key

Product

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.

Drill into SouthEast Area

View By

Sales Rep

Channel

City

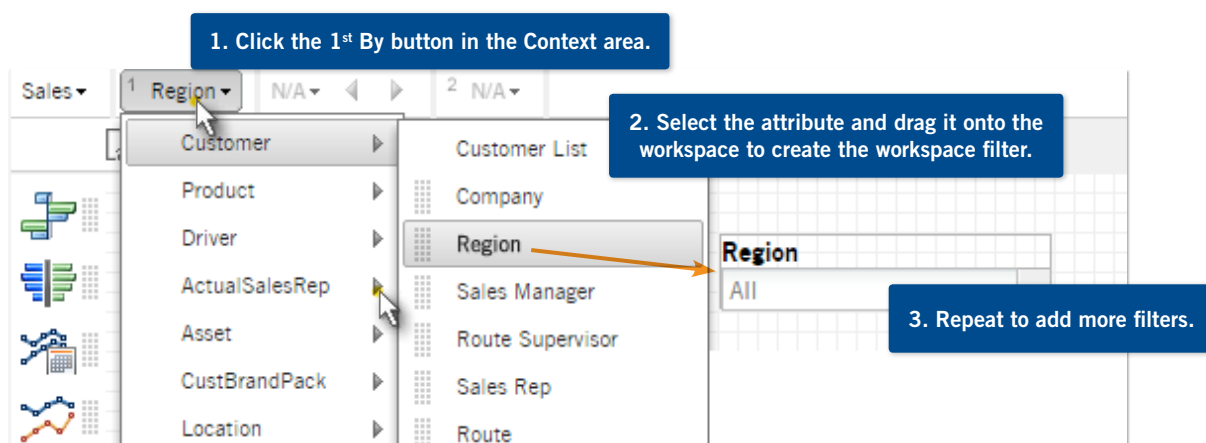
Region	View By	Sales Rep	Channel	City
SouthEast Area	48,14			
SouthWest Area	40,50			
East Area	38,20			
NorthWest Area	34,421	50,748		

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:

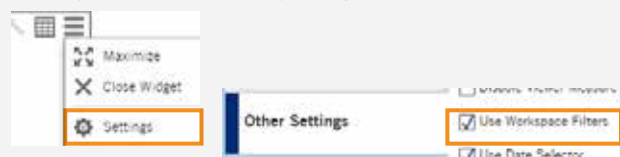


Workspace filters in Viewer

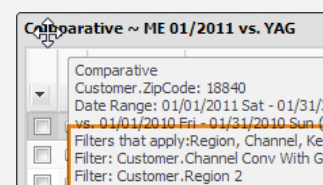


Additional Concepts:

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.

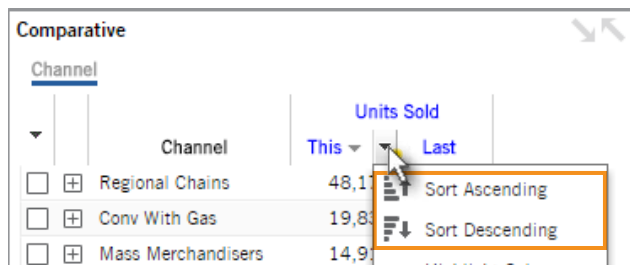


A workspace filter only lists members within its automatically assigned date range, which includes dates between the earliest and latest dates of all of the dashboard's widgets and within the date range of the workspace's data cube (see Page 5).

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.



Comparative

Channel

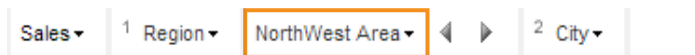
	Channel	Units Sold	This	Last
<input type="checkbox"/>	Regional Chains	48,110		
<input type="checkbox"/>	Conv With Gas	19,830		
<input type="checkbox"/>	Mass Merchandisers	14,910		

Sort Ascending
Sort Descending

Place cursor over column by which to sort, click drop-down arrow, and select a sort option.

Focus:

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

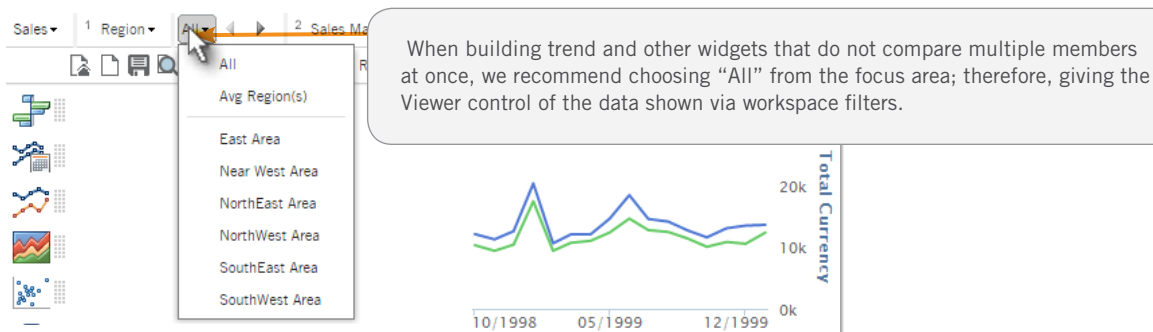


Sales 1 Region NorthWest Area 2 City

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.

	Region	Units Sold	
		This	Last
<input type="checkbox"/>	SouthEast Area	48,140	64,719
<input type="checkbox"/>	SouthWest Area	40,504	60,886
<input type="checkbox"/>	East Area	38,202	55,051
<input type="checkbox"/>	NorthWest Area	34,421	50,748
<input type="checkbox"/>	Near West Area	17,506	21,148

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).



Sales 1 Region 2 Sales M

All
Avg Region(s)
East Area
Near West Area
NorthEast Area
NorthWest Area
SouthEast Area
SouthWest Area

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.

Total Currency

10/1998 05/1999 12/1999

3 Choose the Context Continued

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.

Tip: Published dashboards cannot use private collections; therefore, we recommend using global collections.

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.

Comparative
Group By: Brand
Date Range: 1/1/2000 Sat - 1/31/2000 Mon (1 Month)
vs. 1/1/1999 Fri - 1/31/1999 Sun (1 Month)
Sort: Units (This DSC)
Currency Table: EURO
Filters:
Customer Collection: gas & goodies

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.

Package
All Members
Brand
All Members
Region
All Members
SalesRep
All Members
South Areas

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.

1. Click the widget title to select it.

2. Click the date control.

3. 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 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.

Region	This	Last
SouthEast Area	48,140	64,719
SouthWest Area	40,504	60,886
East Area	38,202	55,051

Date Setup - Comparative

Resolution: ☐ Days ☐ Weeks ☒ Months ☐ Four13 ☒ YTD

Day Filters: ☒ Sun ☒ Mon ☒ Tues ☒ Wed ☒ Thurs ☒ Fri ☒ Sat ☒ Calendar Days

Business Day Table: None

☒ Hide Filtered Time Periods

Time Comparison: ☐ Single ☒ YAG ☐ Advanced

This Date: ☐ Fixed Date ☒ Most Recent ☐ Most Recent Complete ☐ Use cur

1/2011 01/2011

5/2006

4 Select the Time Frame Continued

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 In Viewer Mode.

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.

Resolution

Day Filters

Time Comparison

Start/End Dates and Most Recent or Fixed Options

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.

Monthly End Date

01/2011

01/2011

12/2010

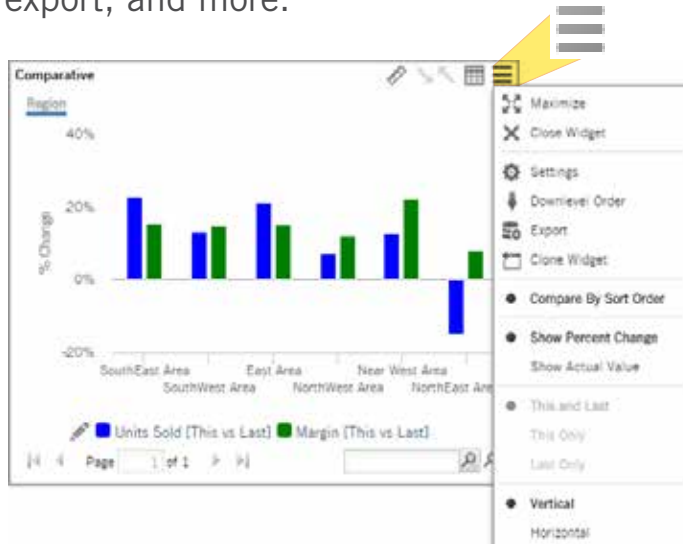
11/2010

10/2010

5 Customize

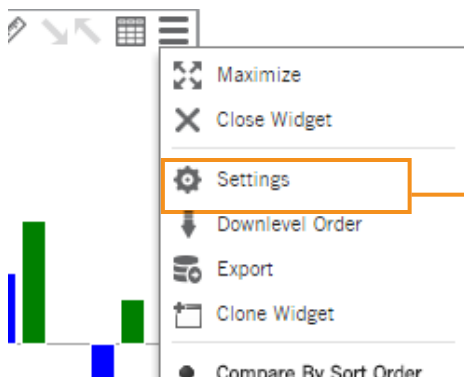
Widget options menu

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.

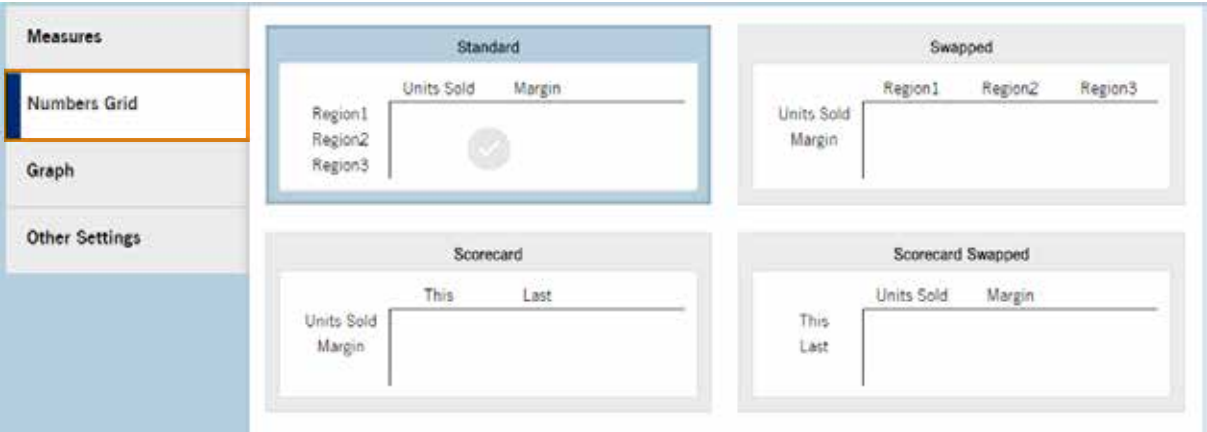
The 'Other Settings' tab is selected. It contains the following settings:

- Title: Comparative
- Title CSS:
- Window Width: 420
- Window Height: 350
- ☒ Enable Export
- ☒ Show Date Setup Icon In Viewer Mode
- ☐ Disable Breadcrumb Path
- ☐ Disable Viewer Measure Changing
- ☒ Use Workspace Filters
- ☒ Use Date Selector
- ☒ Use Equiv Selector

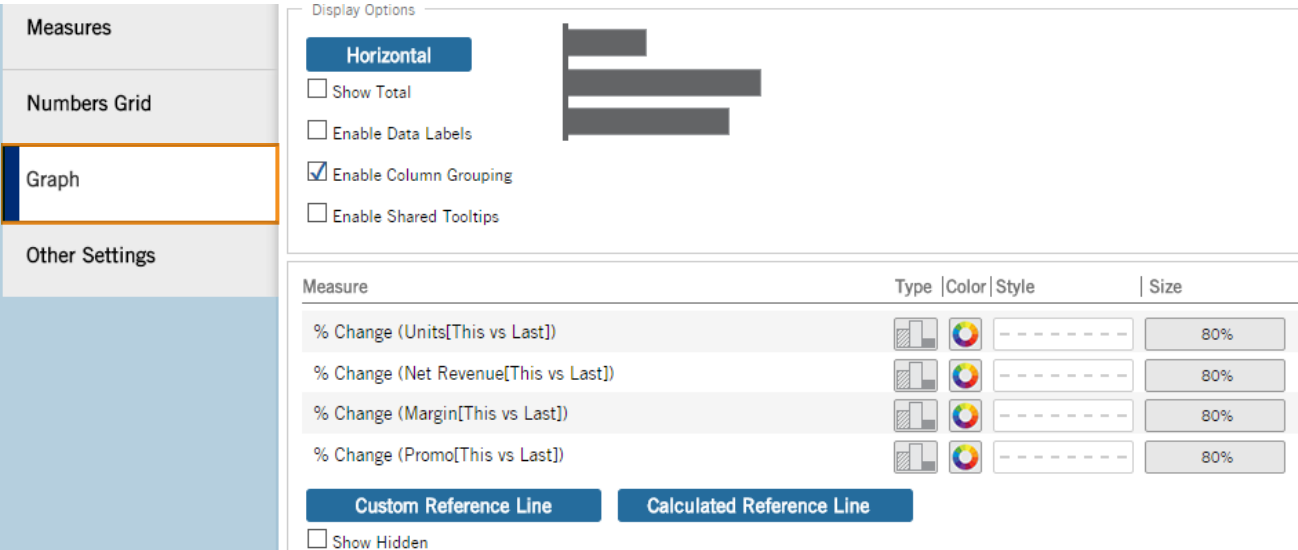
5 Customize Continued

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.

1. Drag and drop the content widget onto the workspace.

2. Click the options button and then Edit.

3. Enter and format text.

Tip: Click to switch to Source Edit mode. This allows you to enter HTML code and embed web content such as videos and web pages.

Dashboard settings

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

Dashboard Settings

General Members **Viewer** Knowledge

Page Size (px) 1280 x 1024

Grid Spacing (px) 10

Export Prompt

Background Image bg-keuka4.png

Badge Image None

☐ Show Standard Widget

☐ Add Cube Name to Data

Tip: The Viewer settings control whether end users will be able to open a new window by double-clicking/rubber-banding.

Tip: Select or upload an image of the dashboard (e.g., screenshot) to display it in the portal instead of the default badge image.

User preferences

Click the user name at the top of Dashboard Designer and select User Settings.

User Preferences

1st and 2nd By display options

☒ Group By Key

☐ Sort Alphabetically

☐ Sort By Downlevel Order

Other options

☒ Always Confirm Before Closing Window

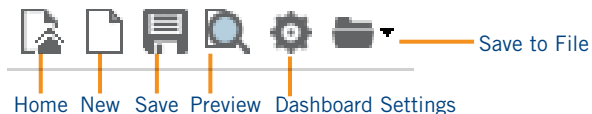
Currency Table: None

OK Cancel

These preferences control how the 1st By and 2nd By menus organize the available attributes.

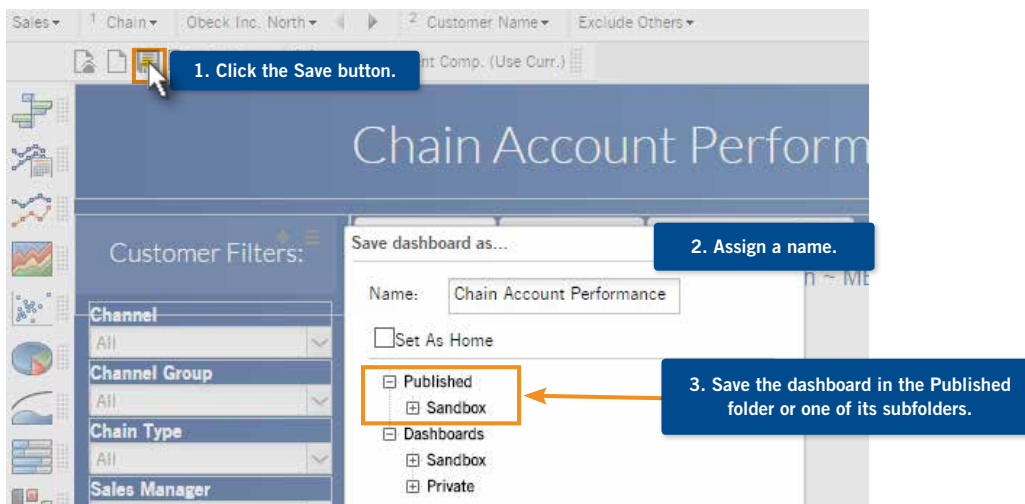
6 Save and Share

Save and publish dashboards to allow Viewers to access them.



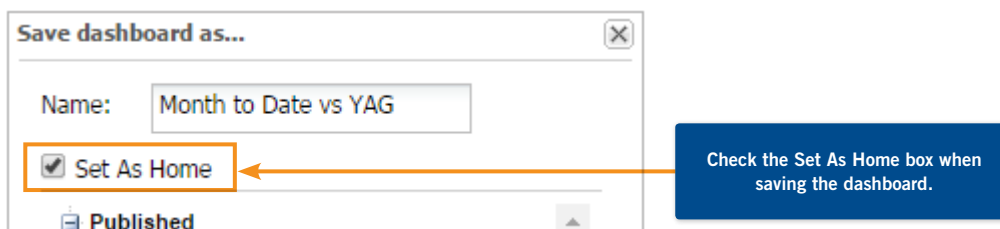
Save and publish a dashboard

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



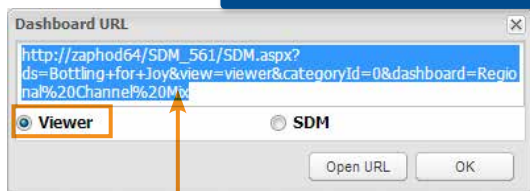
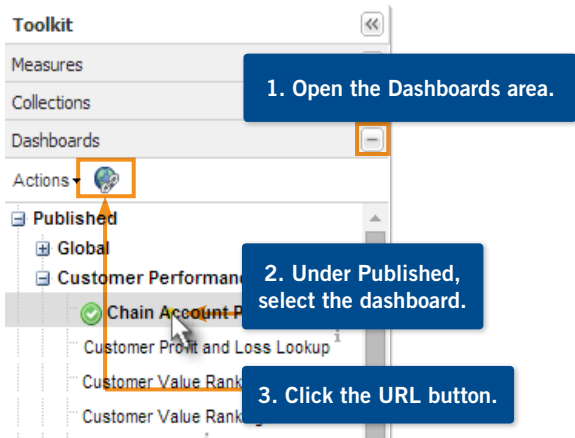
Set the Home view

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



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.

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.



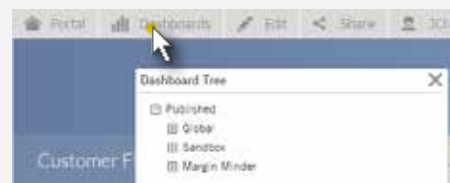
Access from portal

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.



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

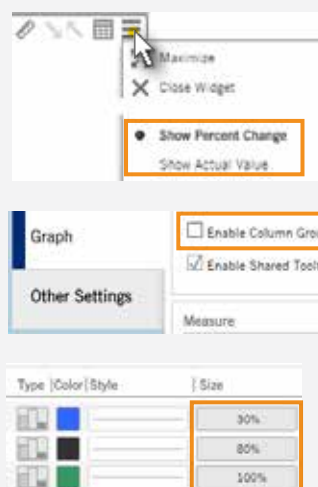
A summary view that compares multiple groupings, showing percent change versus a previous timeframe or actual values.

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.



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



Numbers View

Key/Account	Units		Net Revenue	
	This	Last	This	Last
All Others	971,624	955,819	10,303,814	9,916,337
Obeck Inc. North	294,024	334,976	2,297,303	2,544,640
Village North	287,697	199,916	2,340,250	1,506,426
S. Newburg Dist-North	268,225	238,557	2,037,930	1,809,948
Lindley NE	133,262	116,560	982,148	787,852
Village North	124,334	119,005	968,003	833,243
Pine St-North	119,104	94,439	941,582	724,300
Sep-Rite	118,401	65,608	968,180	507,910

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.

Package	Our Cola	Our Neon	Our DietCola
12Pk Cn	39,190	9,741	10,896
2Ltr-8	19,385	5,708	5,047
6Pk Cn	16,179	6,430	6,714
200z NR	9,550	6,098	2,971
16PNR8	8,152	2,374	3,036
240z NR	5,089	1,494	2,186
2Ltr-8Pa	3,233	1,183	1,052

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.

Key/Account	Month				YTD			
	Units		Margin		Units		Margin	
	This	Last	This	Last	This	Last	This	Last
All Others	85,033	113,756	480,336	627,770	85,033	113,756	480,336	627,770
Obeck Inc. North	27,440	50,732	97,778	152,605	27,440	50,732	97,778	152,605
S Newburg Dist-North	19,366	54,950	83,854	148,367	19,366	54,950	83,854	148,367
Village North	16,987	25,794	55,134	82,577	16,987	25,794	55,134	82,577
Variety North	11,135	16,280	28,436	40,384	11,135	16,280	28,436	40,384
Faire Dist-North	11,130	26,614	33,531	71,488	11,130	26,614	33,531	71,488
Seru-Rite	9,662	18,890	38,079	62,268	9,662	18,890	38,079	62,268
Lindley NE	8,294	11,698	25,639	37,606	8,294	11,698	25,639	37,606
V Northrup Co.	7,028	8,132	25,095	29,333	7,028	8,132	25,095	29,333

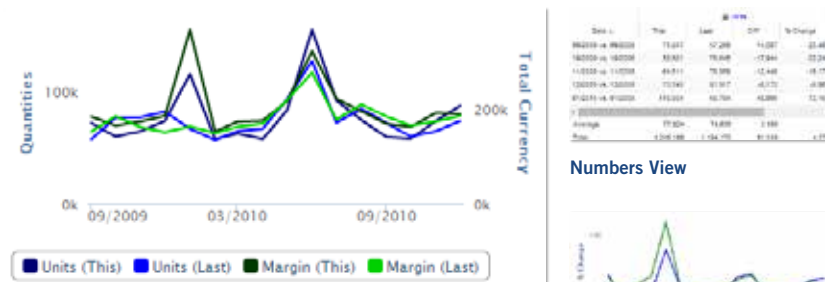
Numbers View

Comparative Time Series

Displays performance trends for multiple time periods.

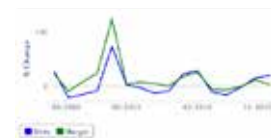
Example:

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



Actual Values (This and Last)

Numbers View



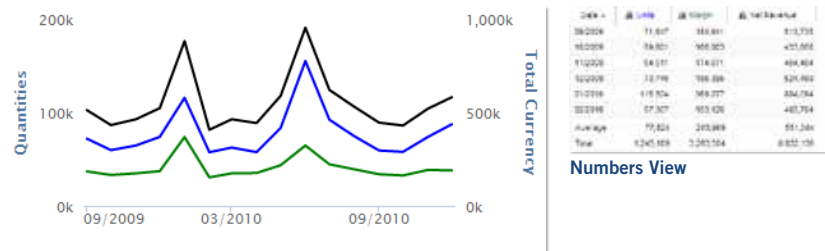
Percent Change

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

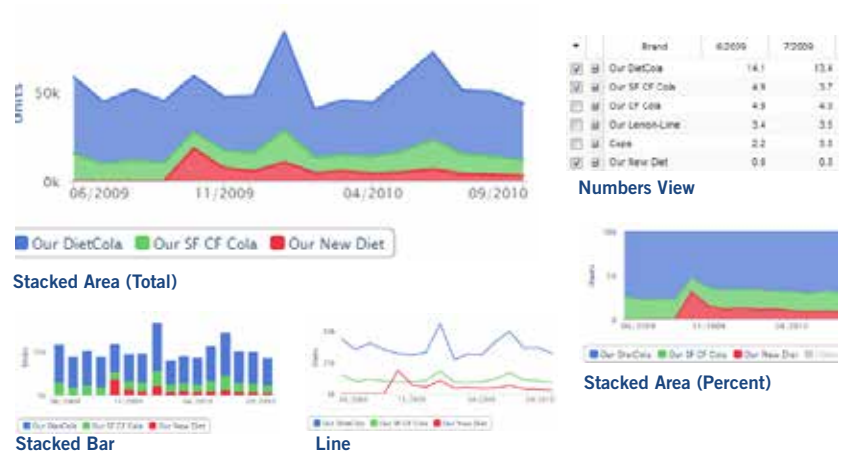
Numbers View

Share Trend

Compares performance trends for multiple members.

Example:

Identify cannibalization within a product category.

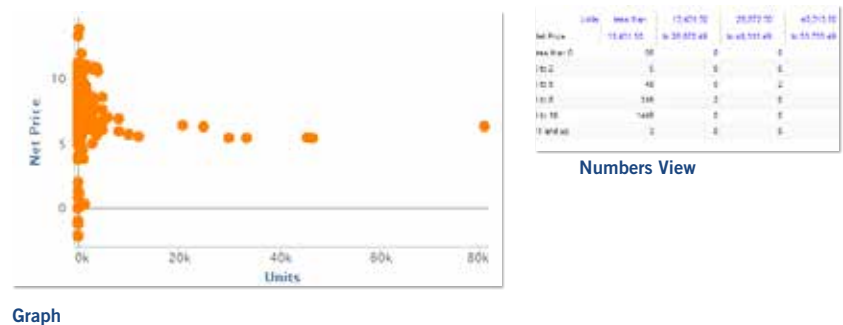


Scattergram

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.

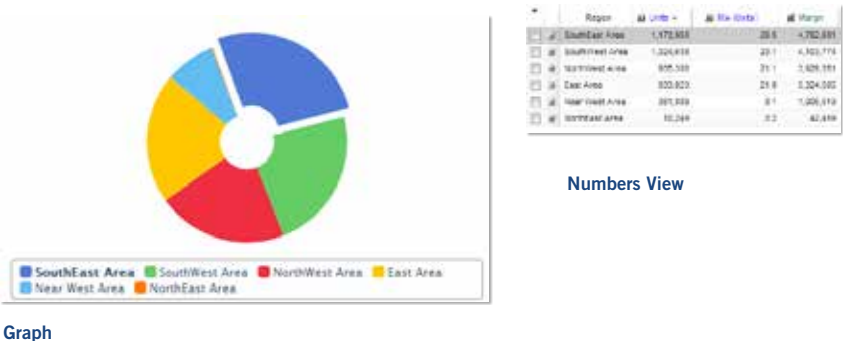


Mix

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.



Graph

Item	Period	% Passed	Period	% Passed	Period
00000	0	0.0	200	100.0	
00000	1	0.0	200	100.0	
00000	2	0.0	100	100.0	
00000	3	0.0	100	100.0	
00000	4	0.0	100	100.0	
00000	5	0.0	100	100.0	
00000	6	0.0	100	100.0	
00000	7	0.0	100	100.0	
00000	8	0.0	100	100.0	
00000	9	0.0	100	100.0	
00000	10	0.0	100	100.0	
00000	11	0.0	100	100.0	
00000	12	0.0	100	100.0	
00000	13	0.0	100	100.0	
00000	14	0.0	100	100.0	
00000	15	0.0	100	100.0	
00000	16	0.0	100	100.0	
00000	17	0.0	100	100.0	
00000	18	0.0	100	100.0	
00000	19	0.0	100	100.0	
00000	20	0.0	100	100.0	

Numbers View

Exception

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

Example:

Customer buy/no buy activity.



Graph

Item	Passed	% Passed	Failed
Our Cola	1,000	100%	0
Our Diet Cola	1,000	100%	0
Our Lemon-Lime	1,000	100%	0
Our Neon	1,000	100%	0
Hires Root Beer	1,000	100%	0
Orange	1,000	100%	0
Ginger Ale	1,000	100%	0

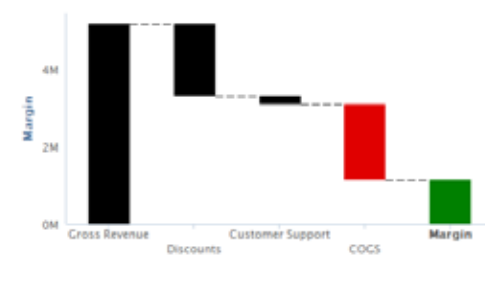
Numbers View

Waterfall

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

Example:

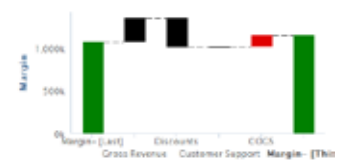
Chain store P&L activity detail.



Actual Value

Item	Value	% Change	Diff
Gross Revenue	1,000,000	0.0%	0
Discounts	-1,000,000	-100%	-1,000,000
Customer Support	-1,000,000	-100%	-1,000,000
COGS	1,000,000	100%	1,000,000
Margin	1,000,000	100%	1,000,000

Numbers View



Difference

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.



Image

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

Example:

Add a custom logo to a dashboard.

Gauge


Displays a visual indicator of the percent change or value.

Example:

Percent change in volume since last year.

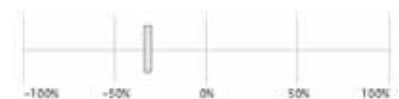


Speedometer

A screenshot of a "Numbers View" table showing regional data. The table has columns for "Region", "This", and "Last".

Region	This	Last
SouthEast Area	48,218	66,894
SouthWest Area	40,006	94,164
East Area	36,941	56,824
NorthWest Area	32,890	52,152
NorthEast Area	13,289	21,428
SouthWest Area	535	117
Total (5)	168,940	247,354

Numbers View



Linear

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.



Tab



Carousel

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.

Measures

- Numbers Grid
- Graph
- Other Settings

Display Options

Horizontal

- ☐ Show Total
- ☐ Enable Data Labels
- ☒ Enable Column Grouping
- ☐ Enable Shared Tooltips

Measure

% Change (Units[This vs Last])

Custom Reference Line

Series Type:

Measure

% Change (Units Sold[This vs Last])

Y Value

Label

Average or Total Line

Series Type:

Measure

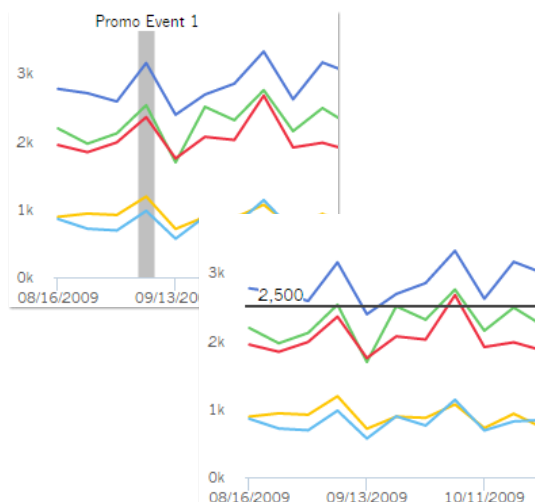
% Change (Units Sold[This vs Last])

Aggregation

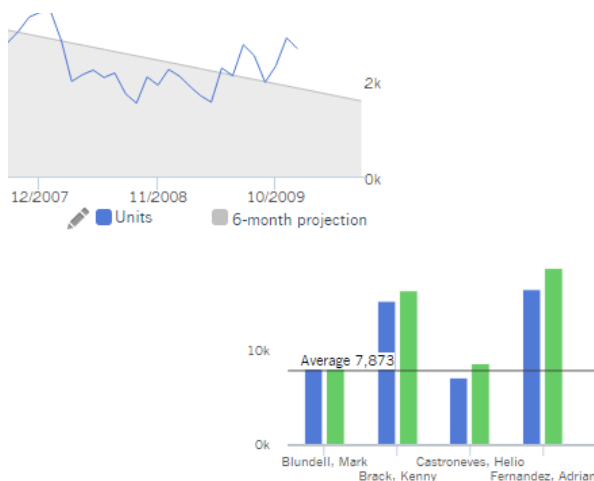
Average

Label

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

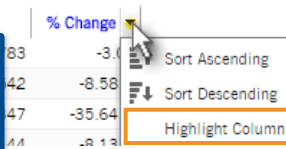
You can highlight data that falls above or below any threshold.

In numbers:

Channel	This ▾	% Change
Regional Chains	57,783	-3.05
Conv With Gas	25,542	-8.58
Mass Merchandisers	21,347	-35.64
Other Groceries	21,144	-8.13
3rd Party Operators	19,111	52.73

1. Click the arrow in the column heading and select Highlight Column.

2. Enable highlighting, enter criteria, and select a style.



☒ Enable green highlighting.

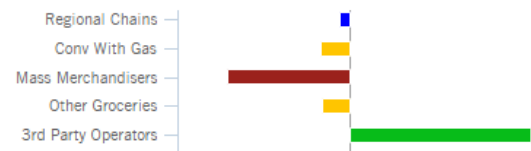
Green Range

Min:

Max:

Style

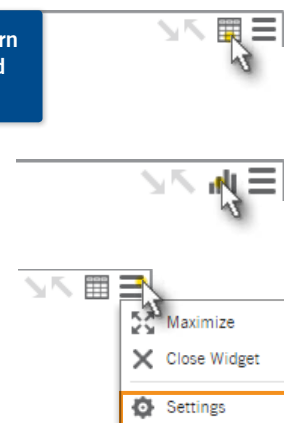
In graphs:



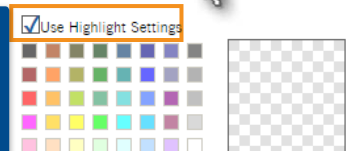
1. Switch to numbers and turn on highlighting as explained on the left.

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.



Advanced Concepts

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:

The diagram illustrates the process of adding a tab group to a dashboard workspace. It includes four numbered steps:

- 1. Drag and drop Tab Group onto workspace.** An arrow points from a 'Tab Group' widget in the left sidebar to the workspace.
- 2. Click Options button to add or rename tabs.** An arrow points from the 'Options' button (a small gear icon) on the 'Tab Group' widget to a context menu.
- 3. Drag widgets onto tabs and configure as desired.** An arrow points from a widget in the sidebar to one of the tabs within the 'Tab Group'.
- 4. Select Settings to change format (tab or carousel) if desired.** An arrow points from the 'Settings' option in the context menu to a 'Tab Settings' dialog box.

The context menu shown in step 2 includes the following options: Add Tab, Settings, Rename Tab, and Close Widget. The 'Tab Settings' dialog box in step 4 shows options for 'Tab Name', 'Background', and 'Color'.

Tip: Click the settings button to access format options. (Icon: Gear)

Tab Groups in Viewer



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.

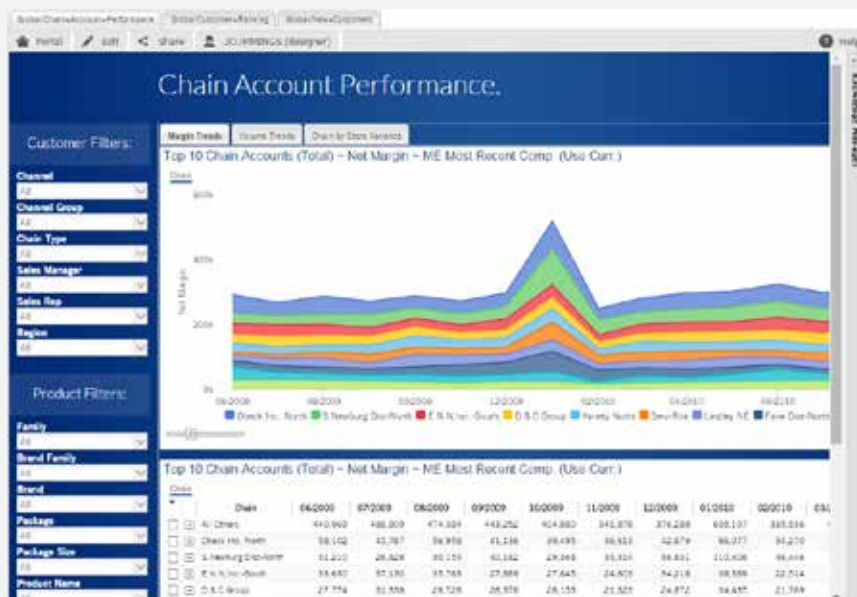
To add a build a dashboard deck:

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.

Independent tabs (i.e. dashboard deck) in Viewer

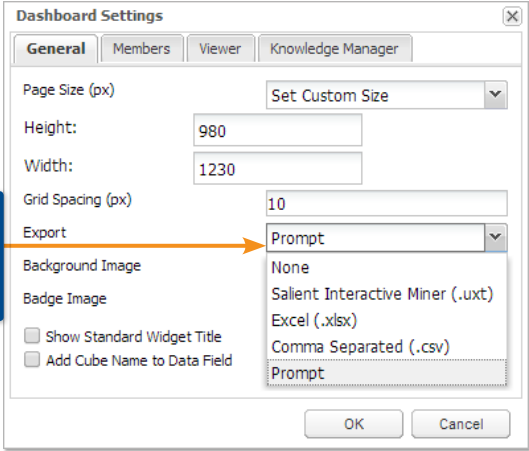


Advanced Concepts

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.

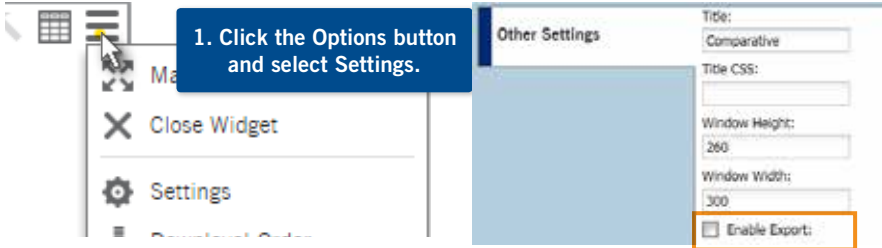
To turn off or limit export options for all widgets in dashboard:



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:

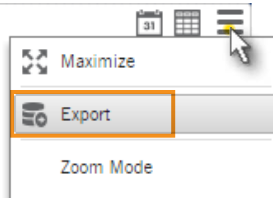


1. Click the Options button and select Settings.

2. In Other Settings, clear the Export option.

Export options in Viewer

Export on with all formats allowed:



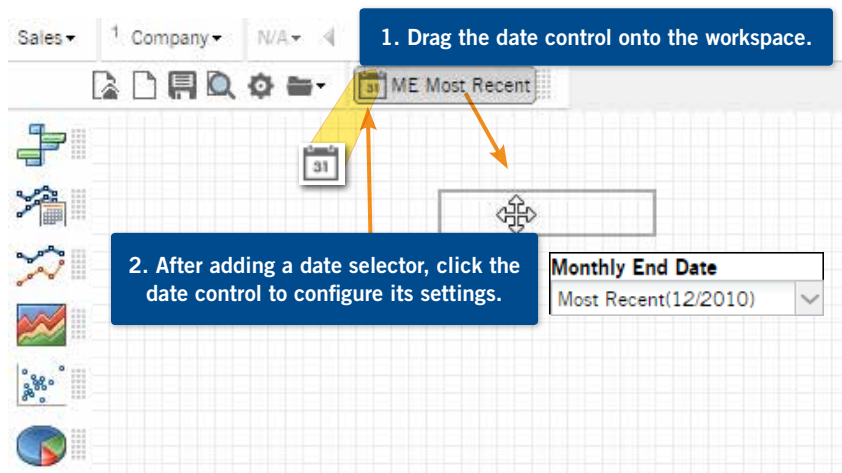
File Type:

- Salient Interactive Miner (.uxt)
- Salient Interactive Miner (.uxt)
- Excel (.xlsx)
- Comma Separated (.csv)

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:



3. From the Date Setup dialog, select the dates to use as choices for the end date (e.g. 12 months).

This Date

☒ Fixed Date ☐ Most Recent ☐ Most Recent Complete

12 02/2010

Dashboard selector in Viewer

Monthly End Date

01/2011

01/2011

12/2010

11/2010

10/2010

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:

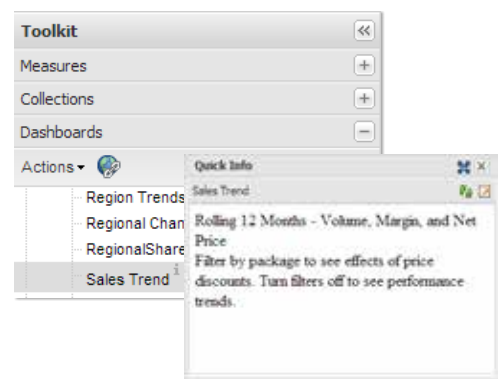
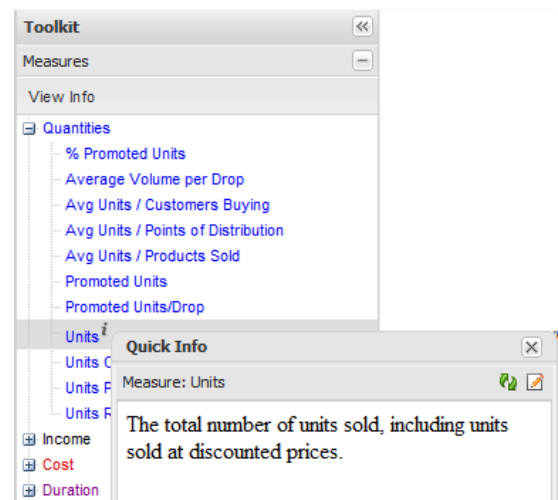
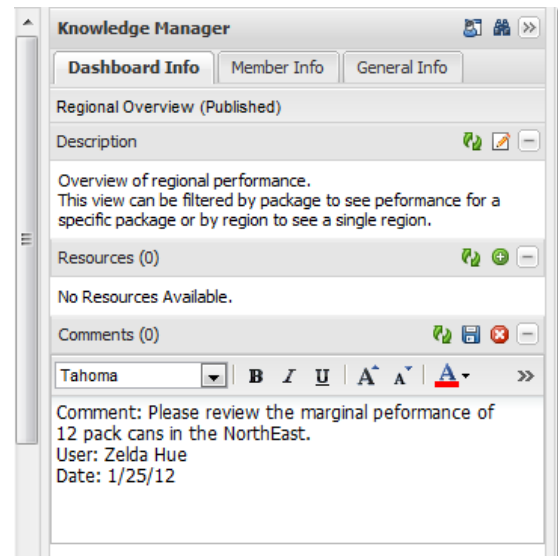
- **Dashboard Info** – includes the description, resource, and comments for a dashboard.
- **Member Info** – allows you to connect media or non-media information to specific customers, brands, products, regions, sales representatives, assets, etc.
- **General Info** – contains global information available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

Measures Info

View and enter information about Measures using controls in the Measures panel. The *i* 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.

