SALIENT® MANAGEMENT COMPANY

June 7, 2018

Salient Dashboards™

Training Guide: Building and Editing Dashboards

Version 7.0

Limited warranty

Trademarks

Copyright notice

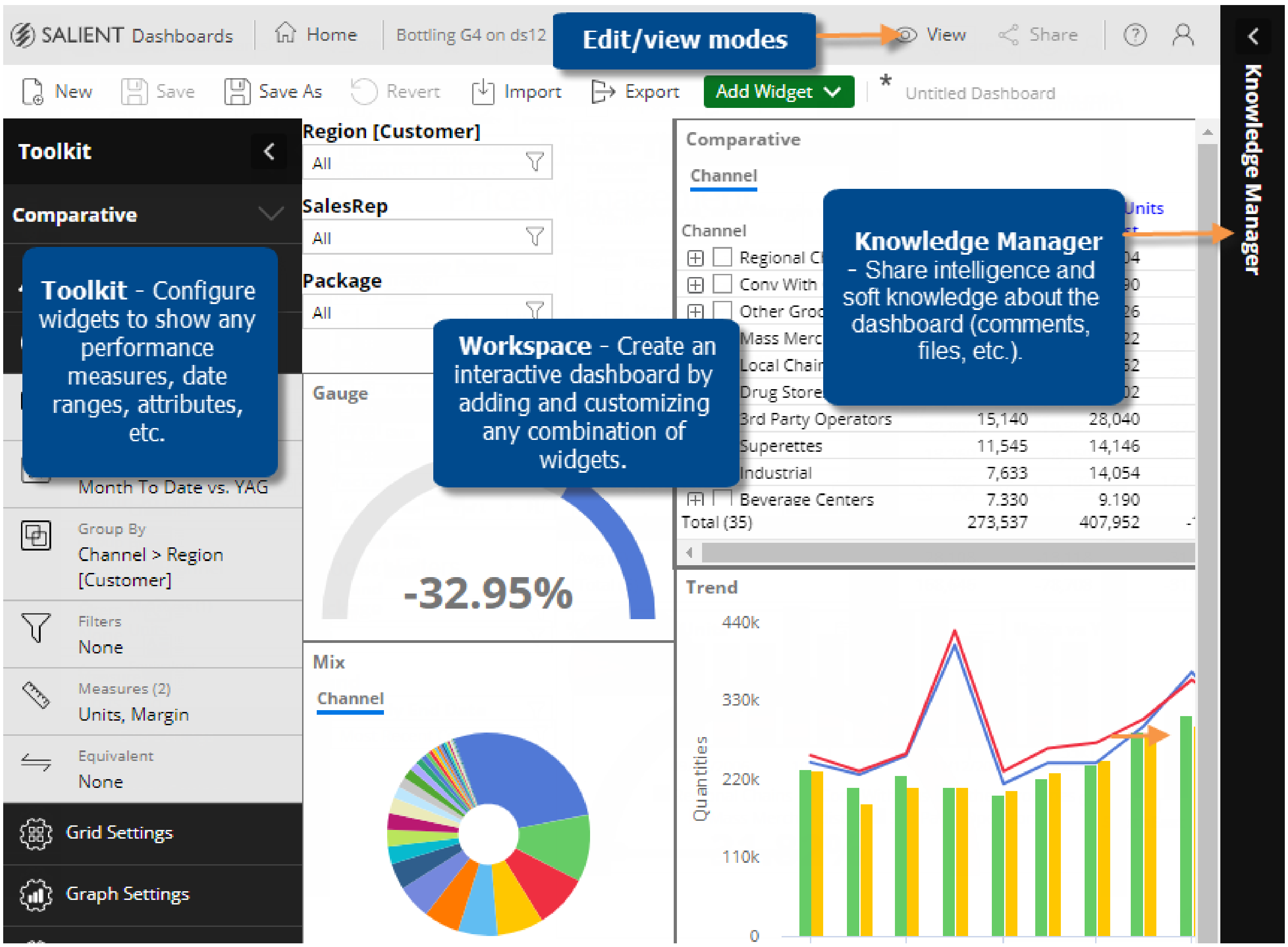
Salient Management Company
203 Colonial Drive, Horseheads, NY 14845
(607) 739-4511
Fax: (607) 739-4045
support@salient.com
www.salient.com

Table of Contents

About Salient Dashboards

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

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



About Power Viewer

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

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

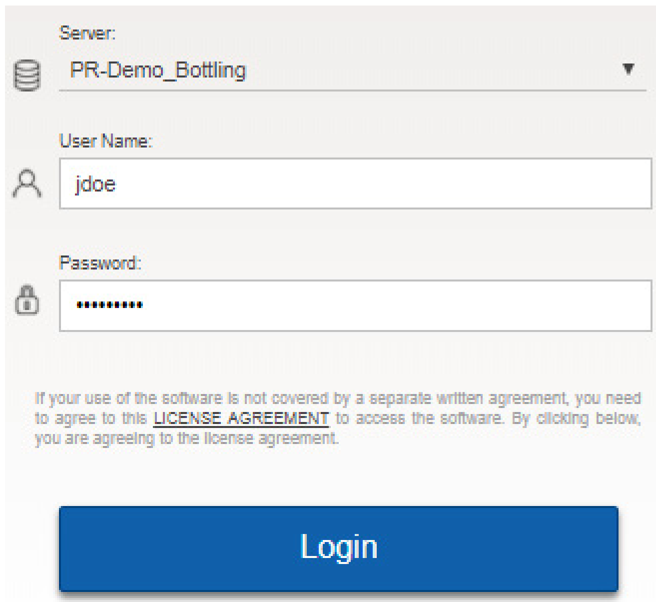
Getting Started

Log in

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

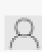
To log in

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



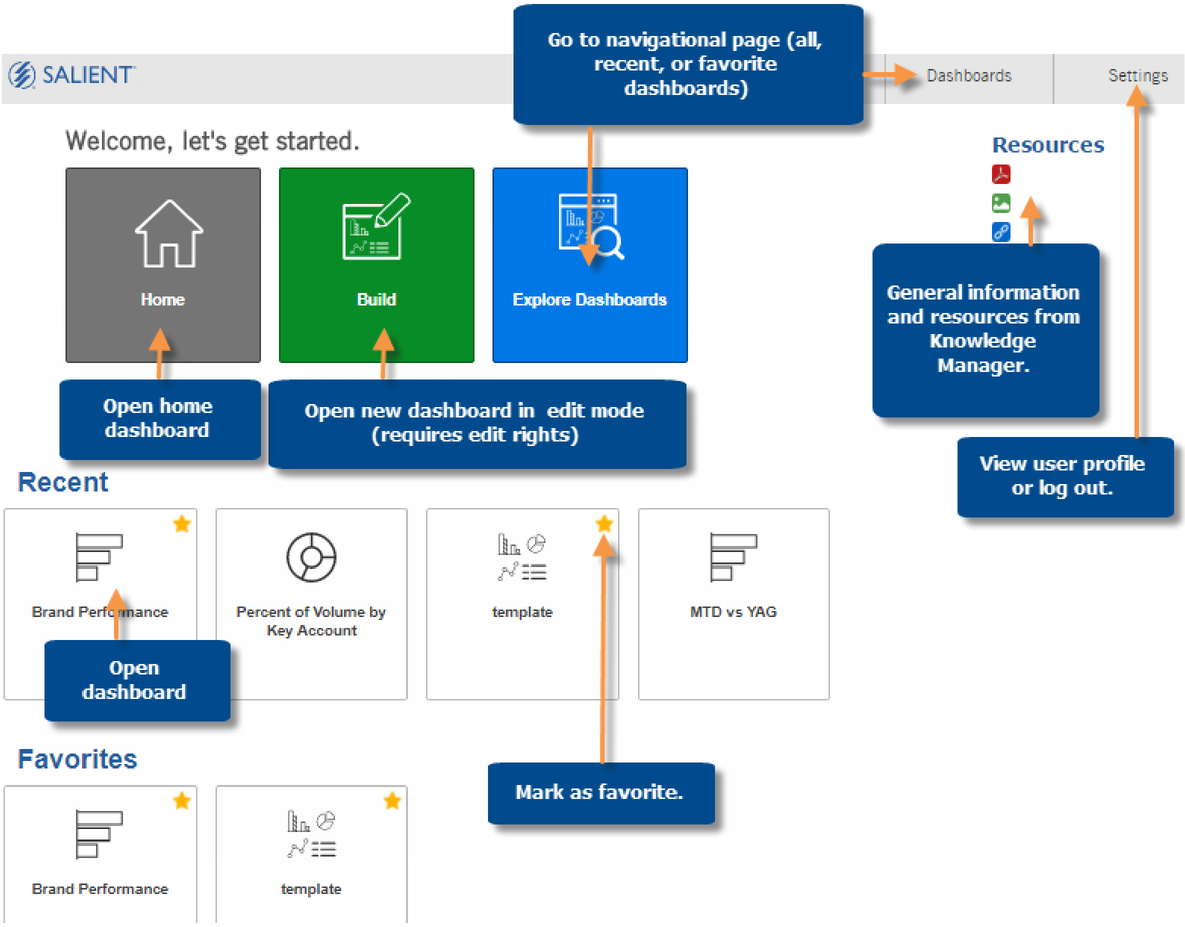
After logging in, you should see the dashboard portal or Salient Dashboards screen.

Tips:

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

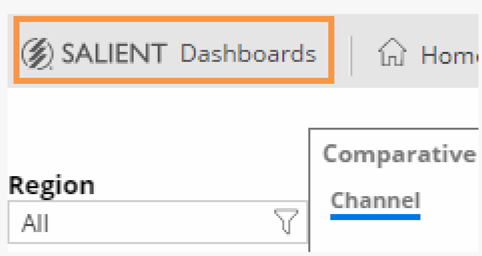
Dashboard portal

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

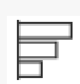


Tips:

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



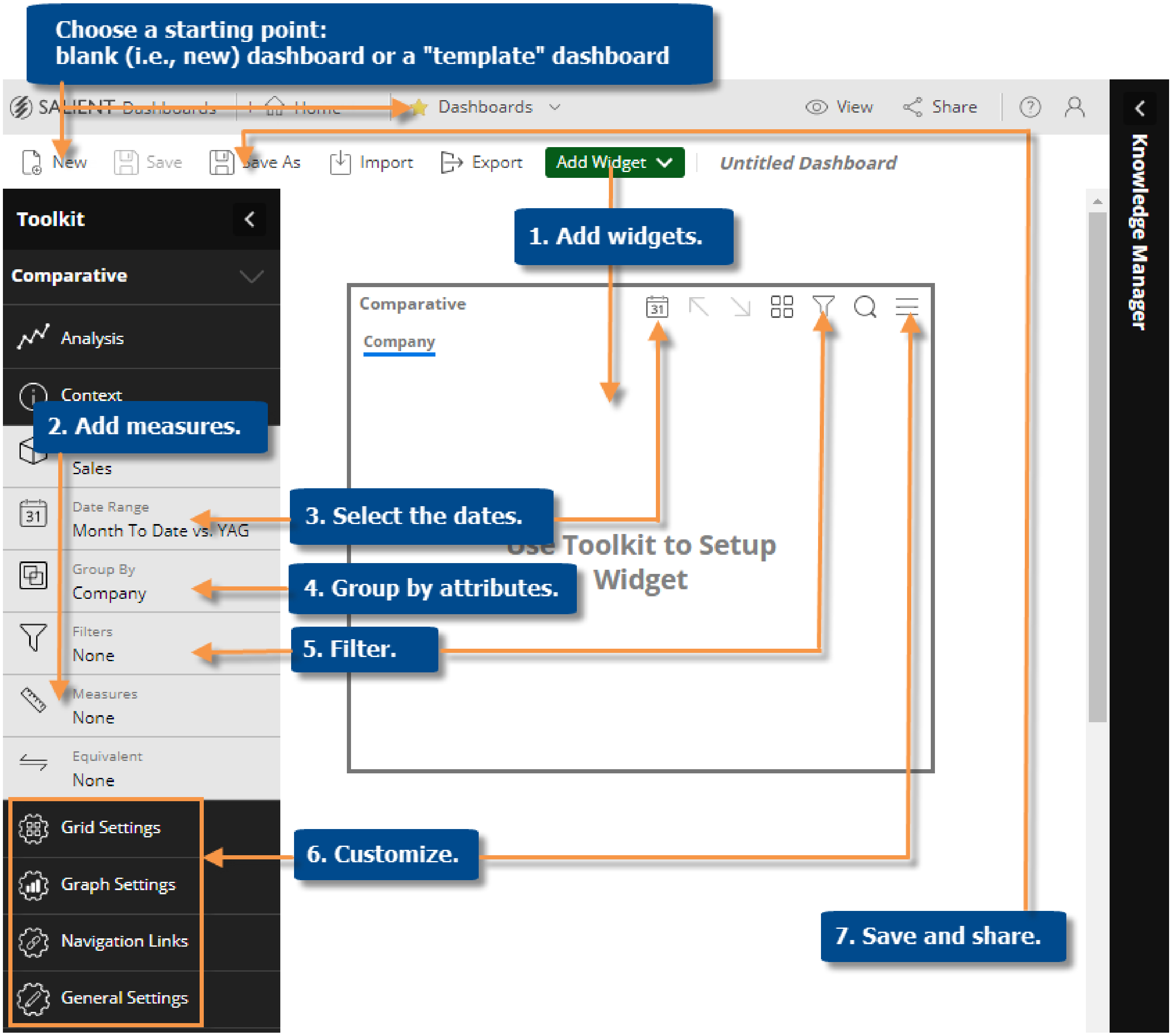
The thumbnail is an uploaded image called a badge (see page 52) if one has been assigned to the dashboard or a general image based on the upper-left widget type.



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

Overview of dashboard creation

You must be in edit mode in order to create or edit a dashboard. The following shows the general process. Refer to the appropriate sections in this documentation for more information.



Tip: You can save any carefully-designed dashboard or blank workspace to use as a template for building new dashboards. For easy access, you could save the dashboard as the "Home" dashboard.

Step 1 - Add Widgets

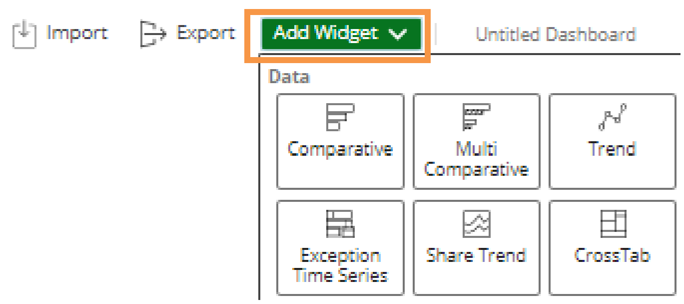
Many different types of analysis widgets (see page 57) are available to help you survey and investigate the data.

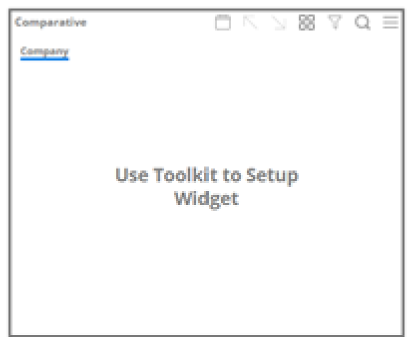
To add a data analysis widget

1. Click the **Add Widget** button at the top of the screen.
2. In the pop-up window:

   To automatically place the widget in the upper-left corner of the workspace, click the button of the analysis type.

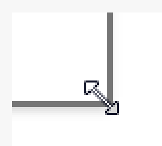
   Or, to place the widget in a specific location, click and drag the button of the analysis type onto the workspace.



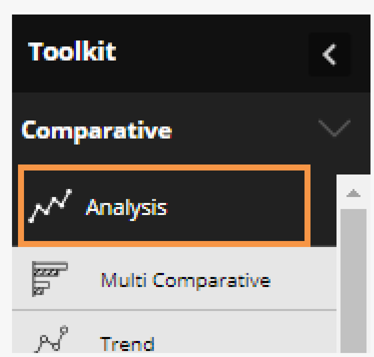


Tips:

- You can optionally change the size of the widget by clicking and dragging its borders.



- You can change the analysis type of an existing widget by clicking on it and then clicking on **Analysis** in the toolkit.



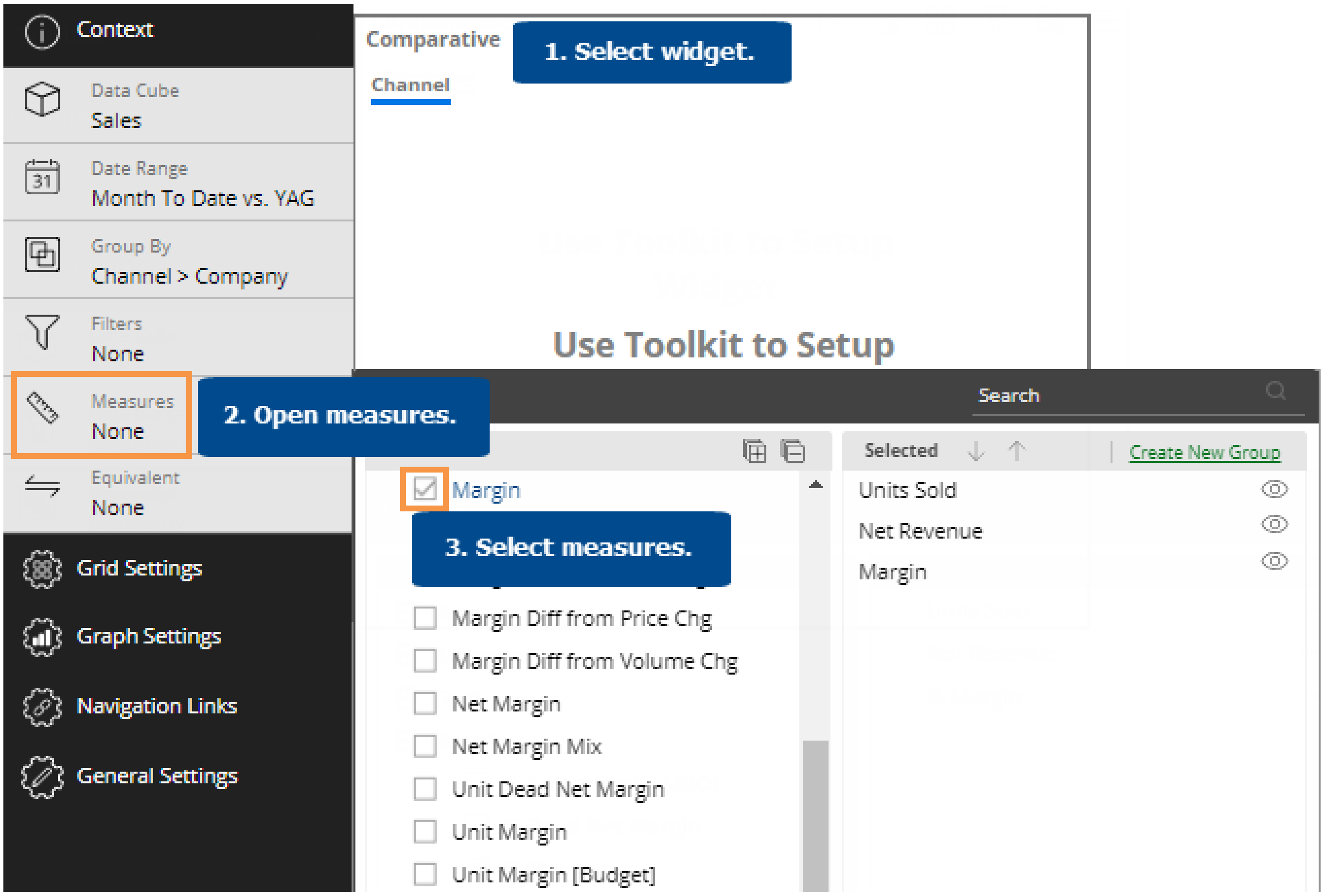
- When you add a widget, it inherits the context settings (date, By, and drill-downs) of the most recently selected widget; therefore, you may want to click on a widget with similar settings (if one exists) prior to adding a widget.

Step 2 - Add Measures

Add measures in edit mode

You can add measures or "data fields" to widgets using the measures area of the toolkit (located under Context). Many widgets can display multiple measures. Other widgets only display one or two measures at a time; however, you can add multiple measures to make them available for selection (see page 19) in view mode or the mobile app.

To add measures



1. **Select widget** - Click on the widget if it's not already selected. You must select the widget before you can add measures to it.
2. **Open measures** - In the Toolkit panel, expand the **Context** area and click on **Measures**.
3. **Select measures** - Under **Available**, click the row(s) or box(es) of the measure(s) to show. The selected measures appear in the right pane.
4. Click **OK**.

Tips:

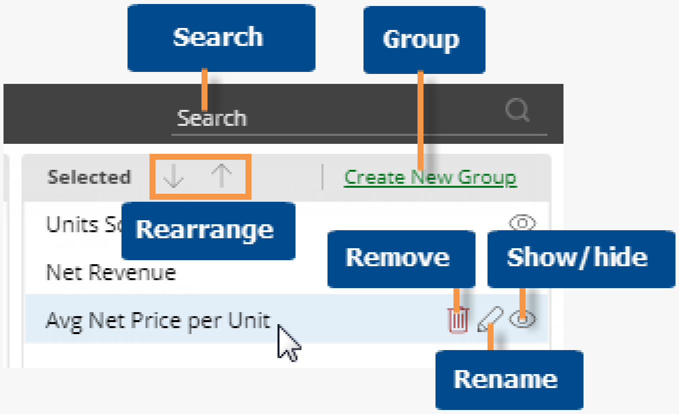
You can create measure groups to help organize measures in grids.

You can search for a measure.

To remove a measure, mouseover its name and click .

To change a measure display name, mouseover its name and click . Note: This changes the display name of the measure in the selected widget only.

To rearrange measure columns after you've added them, use the ↓ ↑ arrows in the measures area.



By default, the available measures depend on the context (data cube, By, etc.). You can check the **Show All** link at the bottom of the dialog to see all measures regardless of the context. Measures may also be limited by the analysis type.

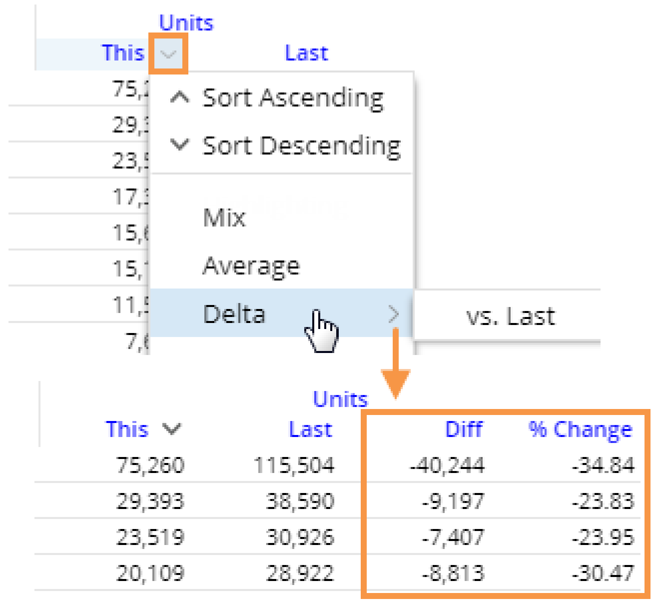
If a grid already has the measure, but is missing a This or Last subcolumn, you can click on the measure column heading and select from a menu to add the subcolumn.

Insert difference and percent change

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

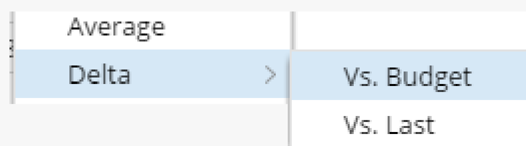
To insert difference and percent change

1. Switch to the grid (see page 43) if you haven't already.
2. To add the difference/change percent (This-Last), place your cursor over the measure's This column, and click the drop-down arrow. From the pop-up menu, select Delta, vs. Last.



Tip:

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

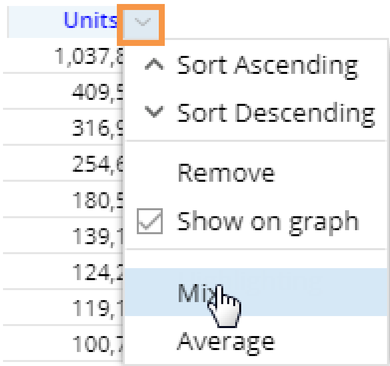


Insert mix

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

To insert mix

1. Switch to the grid (see page 43) if you haven't already.
2. Place your cursor on the column for which you want to add mix values. A drop-down arrow appears.
3. Click the drop-down arrow.
4. On the pop-up menu, select Mix.

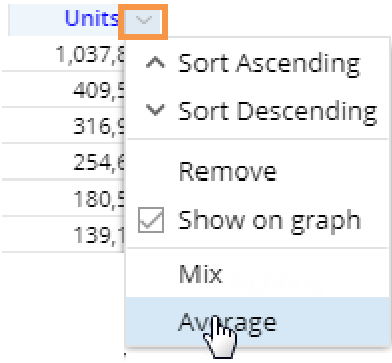


Insert average

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

To insert average

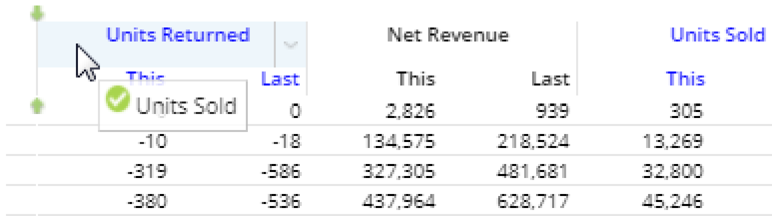
1. Switch to the grid (see page 43) if you haven't already. For the average column to be meaningful, the widget should show at least two units of time (days, weeks, months, etc.)
2. To add the average for This date range, place your cursor over This column; to add the average for Last date range, place your cursor over Last column.
3. Click the arrow that appears and then, from the pop-up menu, select **Average**.



Move measures

To move measures

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



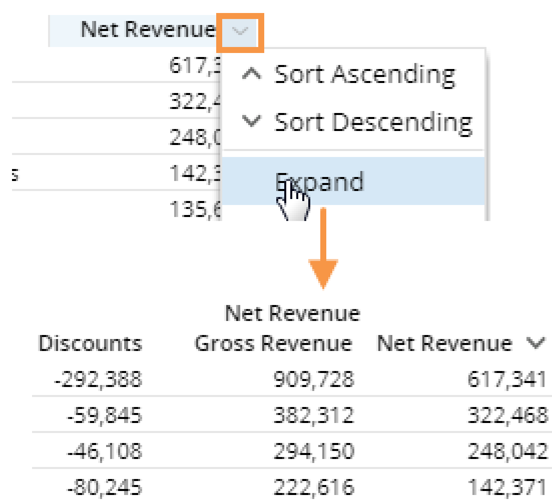
Expand a calculated measure

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

To expand a calculated measure

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

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



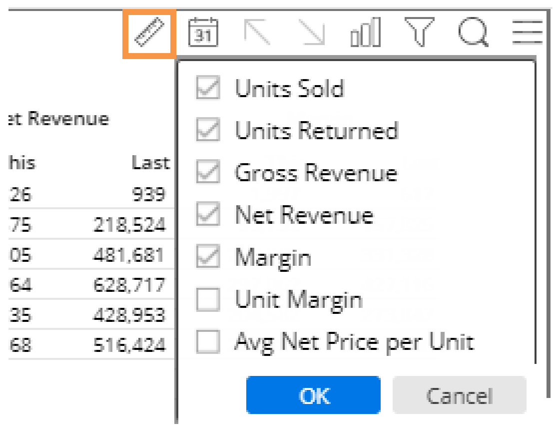
Measure selection tool

Use the measure selection tool (view or edit mode)

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

To select measures

1. On the widget title bar, click the button.
2. In the pop-up window, check the boxes of the measures to show and clear the boxes of the measures to hide. Only measures that have been added (see page 13) to the widget in edit mode are available.
3. Click OK.



Criteria for selecting measures using the tool

- You must have Power Viewer licensing to select measures in view mode.
- The widget must include multiple measures.
- The widget type must support measure selection.
- Measure selection must be enabled (see page 19) for the widget (on by default).

Tip: You can select a few "start-up" measures and then save the dashboard to set the default measures for the widget.

Enable measure selection for viewers

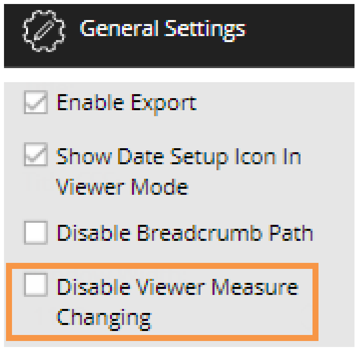
The following is a typical process for allowing measure selection in view mode and configuring a few start-up measures.

1. In edit mode, add several measures to a widget (see page 13). Only measures that have been added to the widget will be available for selection.
2. If desired, add columns for difference & percent change (Delta), mix, etc., so that those columns are pre-configured for the user.
3. Using the measure selection tool (visible in the upper-right corner of the widget on mouseover), show your preferred "start-up" measure(s) for the widget; hide all other measures.
4. Make sure that measure selection is enabled for the widget. Measure selection is enabled by default.

   i. Click on the widget for which to allow measure selection.

   ii. In the toolkit, expand **General Settings**.

   iii. Make sure the **Disable Viewer Measure Changing** box is cleared to enable measure selection.



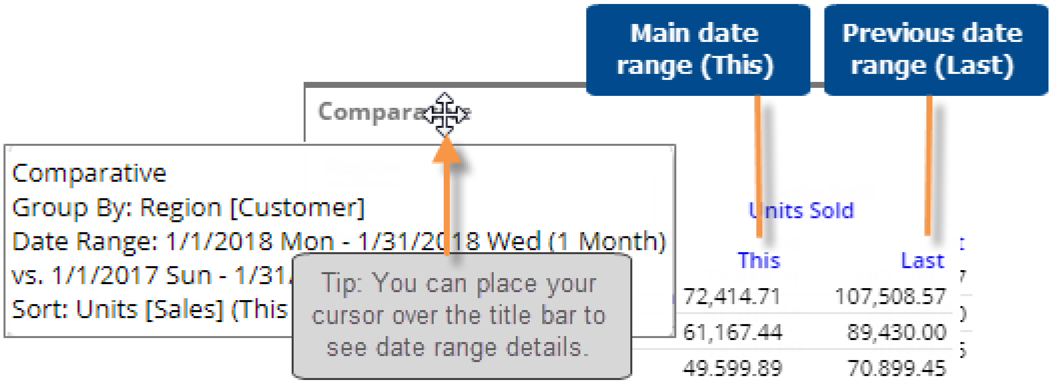
Tips:

- Users can add mix and percent change/difference regardless of whether or not measure selection is enabled.
- Viewer measure selection is not available in Exception and some other widget types.
- Only Power Viewers can select measures.

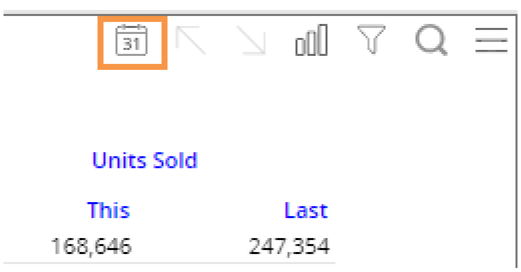
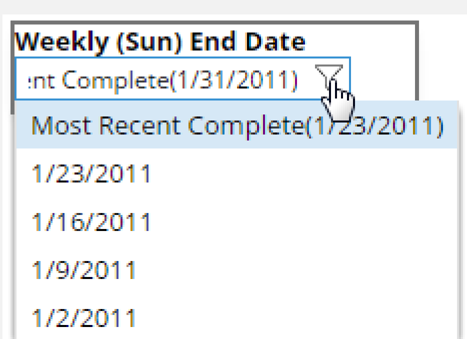
Step 3 - Select the Dates

In date setup (see page 22), you can choose a range of dates (days, weeks, months, etc.) to display when the dashboard is first opened. This provides a commonly-used "starting point" that can update nightly. Date settings can be applied per widget and/or linked across multiple widgets.

In some widget types, you can also set a previous date range with which to compare results. Most widgets total data over the selected range(s); time-series widgets show each date in the range individually.



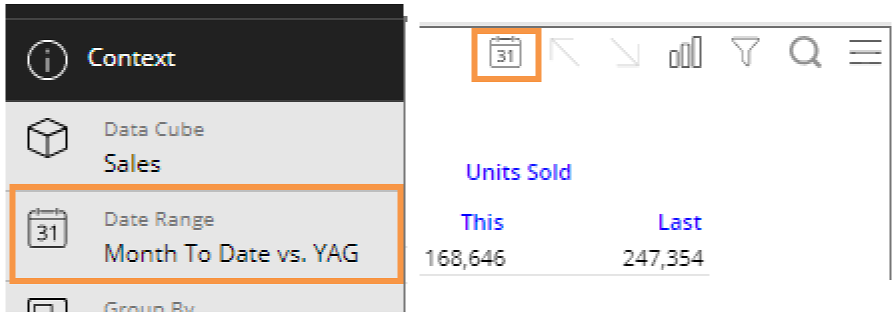
Depending on the configuration of the dashboard, users may be able to change the date range the following ways in view mode or the mobile app:

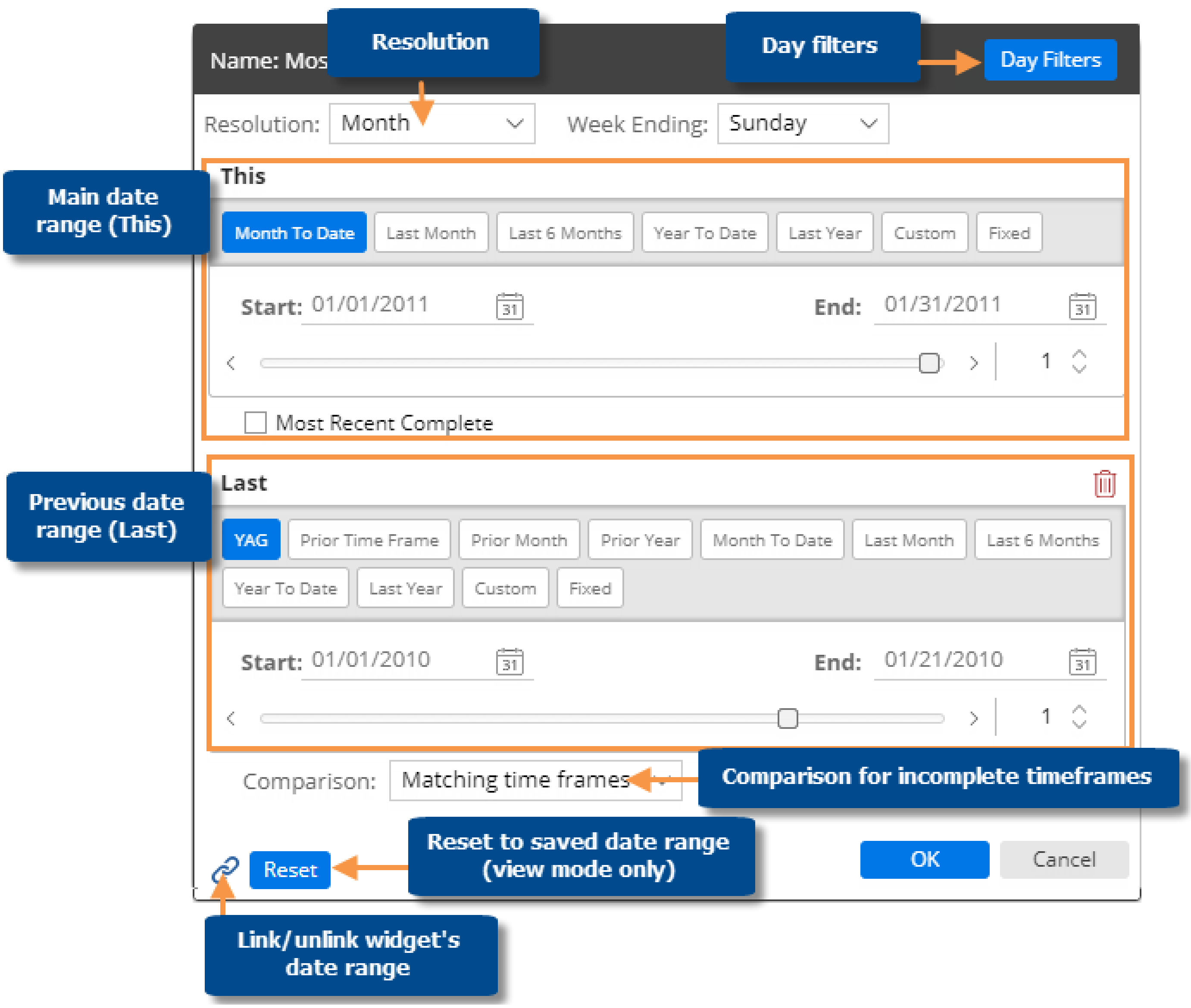
<table>
<tr><th>Viewer date options</th><th>Explanation</th></tr>
<tr><td>Date setup icon

</td><td>By default, each widget will have a date setup icon (see page 22) that allows the user to change the date setup, including resolution, number of dates, start/end dates, and other settings, using the same options available in edit mode. This icon may be disabled for a widget.</td></tr>
<tr><td>Date selector

</td><td>A date selector (see page 74) allows users to change the end date of multiple widgets using a drop-down menu. If configured, the date selector affects all widgets in the dashboard by default, but may be turned off for specific widgets. You can add a date selector to the dashboard if you want this method of date selection to be available to users.</td></tr>
</table>

Date setup

To select the date setup

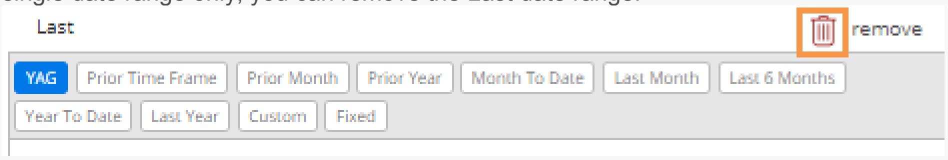
1. Click the date setup icon [31] in the title bar of the widget, or click on the widget and then click on Date Range under Context in the toolkit.
2. In the dialog, choose from the following date settings. The available options depend on the dataset and may be pre-configured by your administrator.





<table>
<tr><th>Option</th><th>Explanation</th></tr>
<tr><td>Resolution (i.e. days, weeks, months, or customized periods, etc.)</td><td>Choose the units of time from the menu at the top of the dialog. This selection controls which date presets will be available.</td></tr>
<tr><td>Main date range (This)</td><td>Under This, click the button of the date range to view (e.g. Month To Date). The available date presets depend on the resolution selected above and the dataset configuration. If you wish, you can customize the date range further after making your selection.</td></tr>
<tr><td>Day filters (optional)</td><td>Optionally, click the Day Filters button at the top of the dialog to choose specific days of the week or business days within the date range to analyze. Data for all other dates will be filtered out.</td></tr>
<tr><td>Comparison date range (Last)
- optional</td><td>Under Last, click the button of the previous date range (e.g., YAG). The available options depend on the resolution selected above.

If the dialog does not include a Last section, click Add Date Range at the bottom of the dialog to include a previous date range if desired.

Tip: A comparison date range is optional in many widget types. If you want to look at a single date range only, you can remove the Last date range.

</td></tr>
<tr><td>Comparison for incomplete timeframes</td><td>A Comparison option at the bottom of the dialog determines how to select the dates in Last date range when This date range is incomplete.
Matching time frames - Adjust the number of days in Last date range to match the number of days in This date range for a precise view of gain/loss (i.e. how much better/worse are we doing). For example, compare March 1 through 15 of this year with March 1 through 15 last year.
Complete last period - Do not adjust the number of days in Last date range; instead show the complete last month or period for a gap or goal perspective (i.e. how much more to go). For example, compare March through 15 of this year with the full month of March last year.</td></tr>
</table>

Option	Explanation
Linked dates	Toggle the link icon at the bottom of the dialog to link or unlink the widget's date range, depending on whether or not you want the date range to update automatically with other widgets. - indicates that the widget's date range is linked to other widgets. In view mode, the date ranges of all linked widgets update simultaneously when one of them is changed. - indicates that the widget's date range is unlinked and, therefore, has its own stand-alone date range. **Tips:** Even if date ranges of widgets are linked, they operate independently in edit mode to allow you to set different initial date ranges for the widgets. The date icon setting must be on (in general widget settings) for linked date ranges to function. You can also link/unlink a widget using the **Use Dashboard Date** setting in general widget settings.

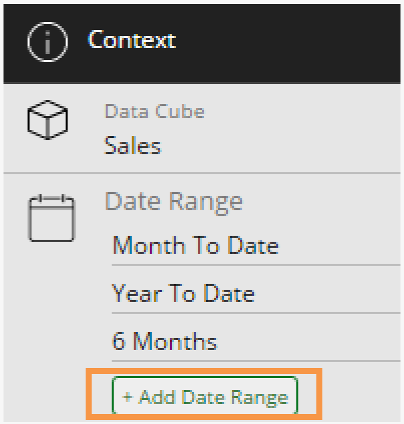
Tips:

The date range selected in edit mode (prior to saving) is used as the default that appears when users open the dashboard in view mode.

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

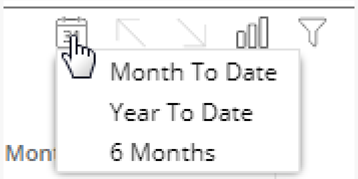
Multi Comparative widgets can show additional date ranges besides the standard This and Last ranges (e.g., MTD vs. YAG and YTD vs. YAG).

To add date ranges to the Multi Comparative, select the widget and then click Add Date Range under Date Range in the toolkit.



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

Multi Comparative date ranges cannot be linked to other widgets.

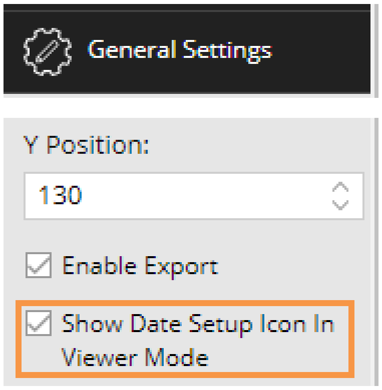


Enable or disable date setup for view mode

By default, the date setup icon is enabled in view mode allowing users to change the date of a widget.

To enable/disable date setup icon for view mode

1. Select the widget for which you want to disable or enable the date setup icon.
2. Expand **General Settings** in the toolkit.
3. Locate the **Show Date Setup Icon in Viewer Mode** property and check or clear its box.

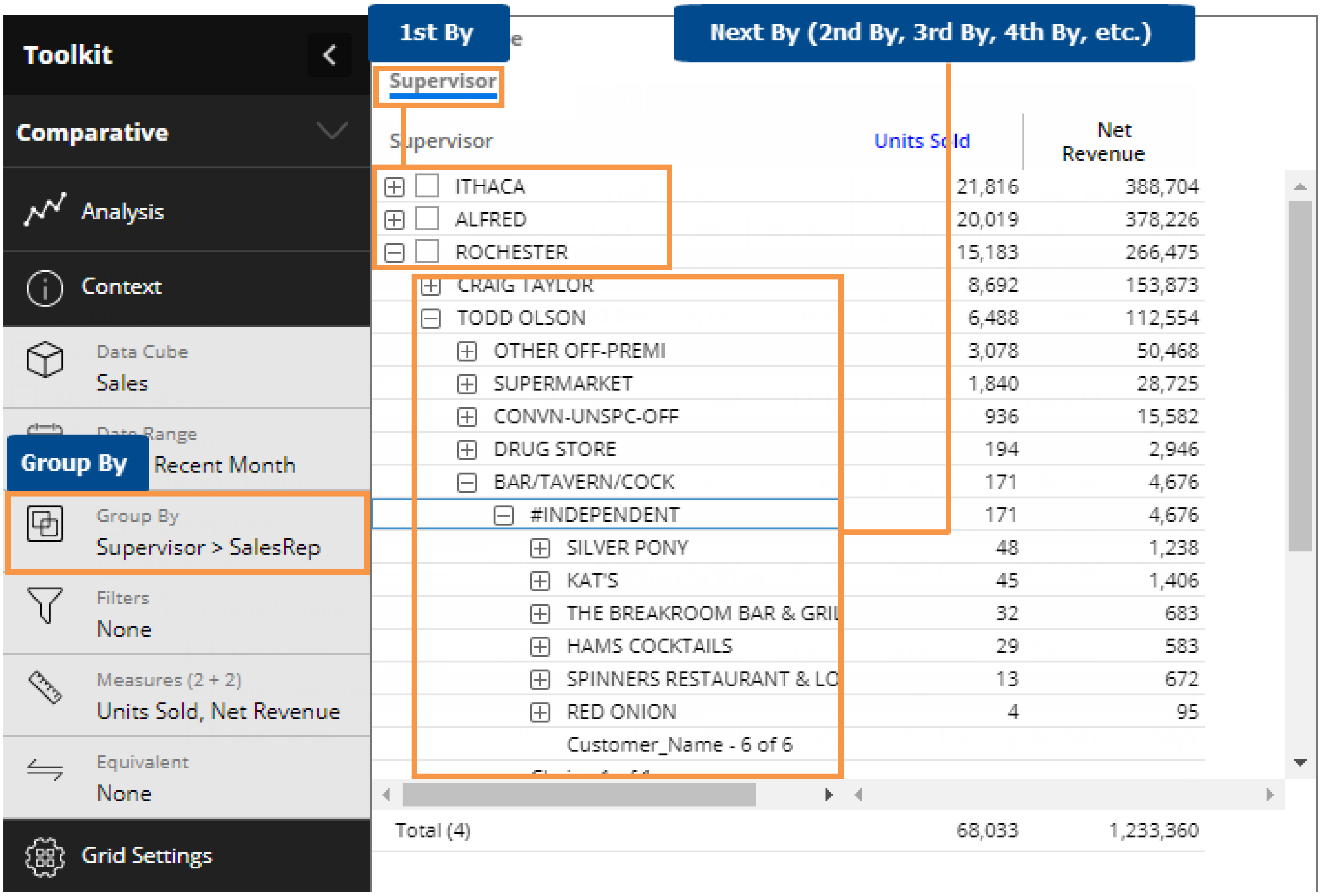


Step 4 - Group By Attributes

Group By

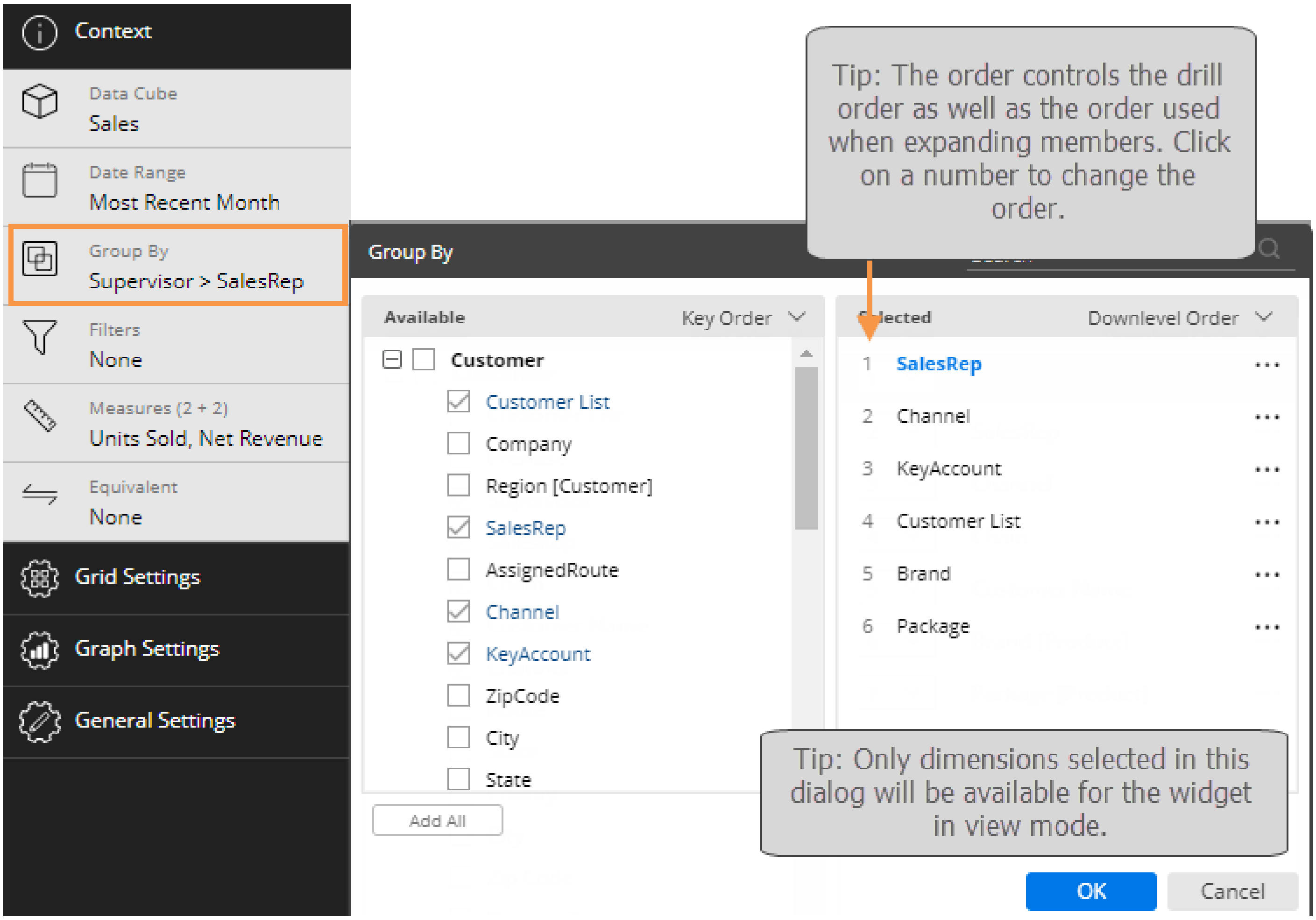
In widgets that compare members (Comparative, Multi Comparative, etc.), the "Group By" selected in edit mode controls the following:

- How data is grouped at the highest level (1st By).
- If and how members can be expanded into additional levels of data (2nd By, 3rd By, etc.).
- The order of dimensions when drilling down (i.e., drill order).
- What users can select as the By from the breadcrumb path.
- What users can drill into.
- What widget filters can be created (in the widget's filter dialog).



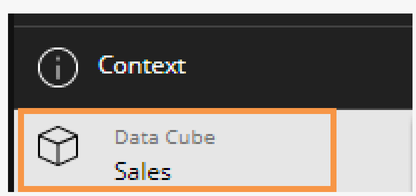
To select the Group By (in widgets that compare members)

1. Click on the widget and then click on **Group By** in the toolkit.
2. In the dialog, check the box of the dimension to use as the 1st By.
3. Then, check the box(es) of any additional dimensions to use as the 2nd By, 3rd By, etc.
4. Click OK.



Tips:

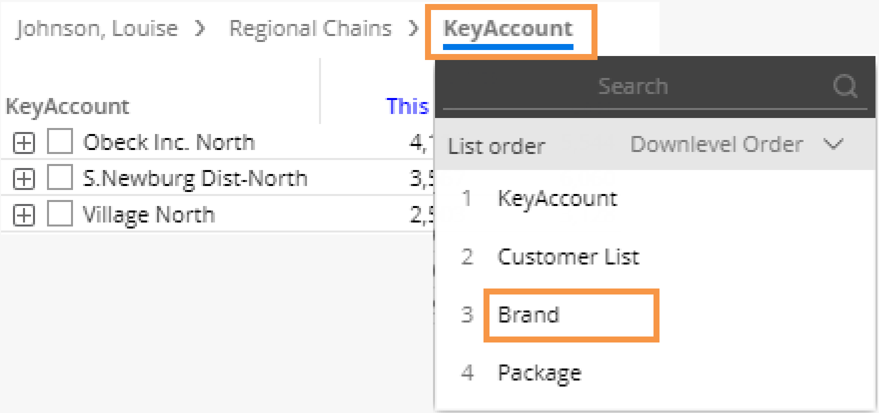
If the desired By is not listed, you may need to change the data cube using the drop-down menu in the context panel.



Tips:

You can swap a By in the Group By dialog by clicking the original dimension in the right pane, placing your cursor over a different dimension in the left pane, and clicking the arrow button. If you don't select a dimension in the right pane, this swaps the 1st By.

Users can also click the breadcrumb path at the top of the widget to change the By in edit mode and view mode. The dimensions are limited to those selected in the Group By dialog. Only Power Viewer users can select the By in view mode.



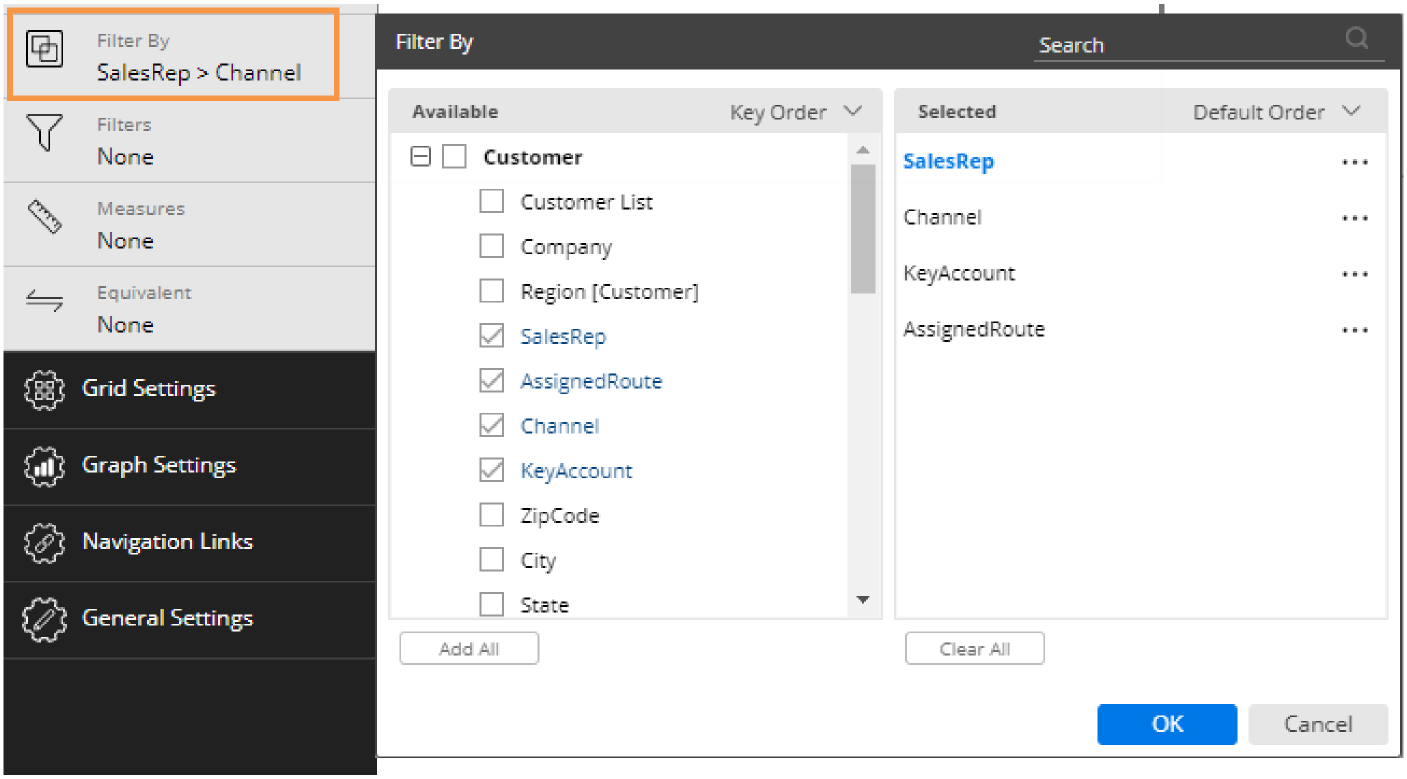
You can search for a dimension by entering its first few characters at the top of the dialog.

Filter By

In non-comparative widgets (Trend, Gauge, Waterfall, etc.), data is aggregated rather than grouped by a dimension. Therefore, instead of a Group By, a Filter By is available in edit mode to let you select what widget filters can be created (in the widget's filter dialog). The Filter By selections affect edit mode and view mode.

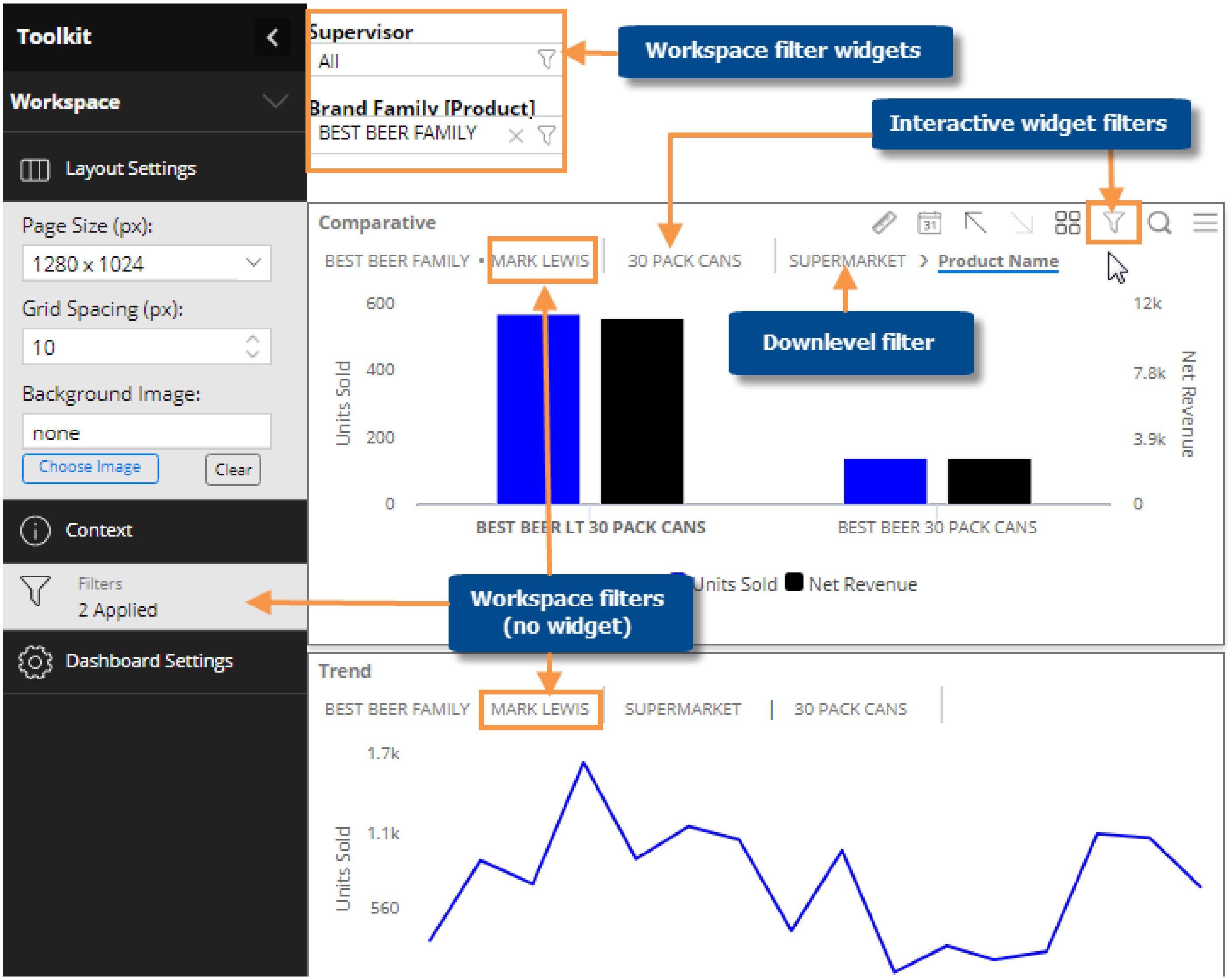
To make widget filters available (in non-comparative widgets)

1. Click on the widget and then click on **Filter By** in the toolkit.
2. In the dialog, check the box(es) of the dimensions for which widget filters will be allowed.

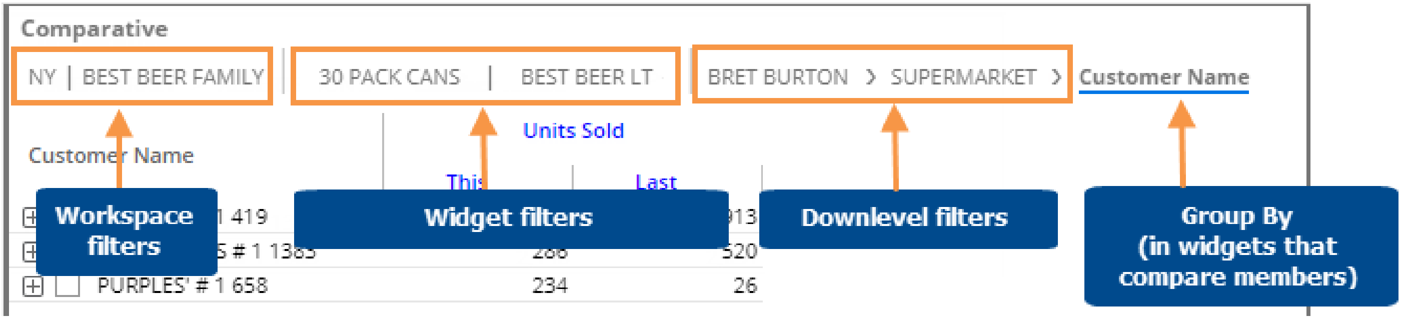


Step 5 - Filter

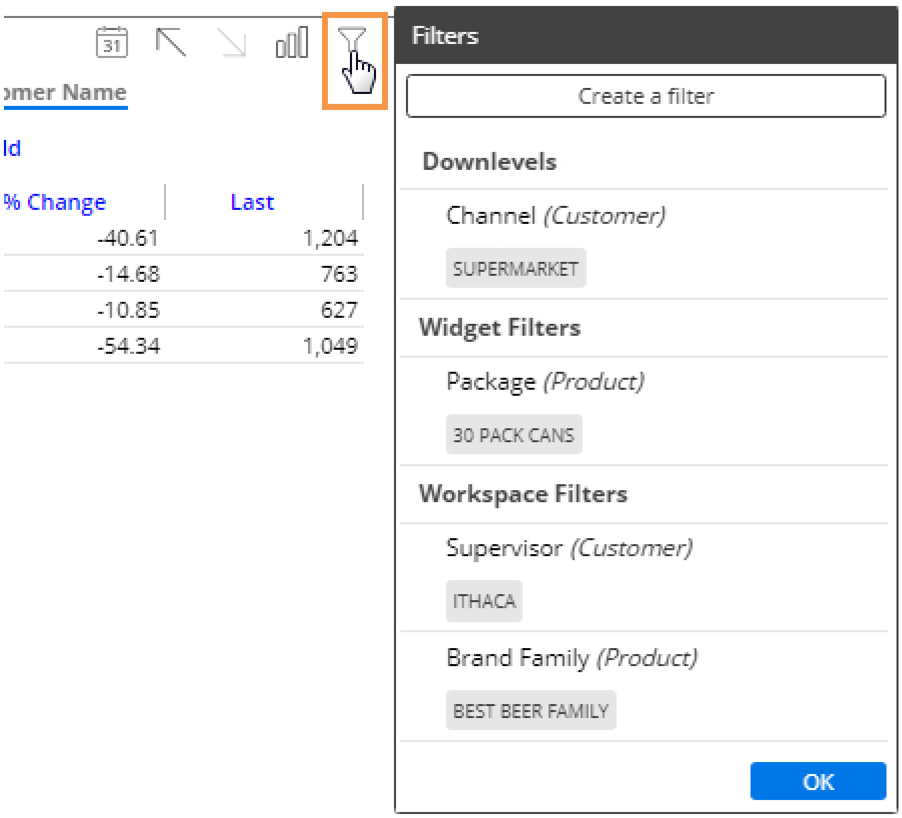
Dashboards provide several ways to filter the data to narrow down on the exact information needed.



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



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



Pre-configured filters

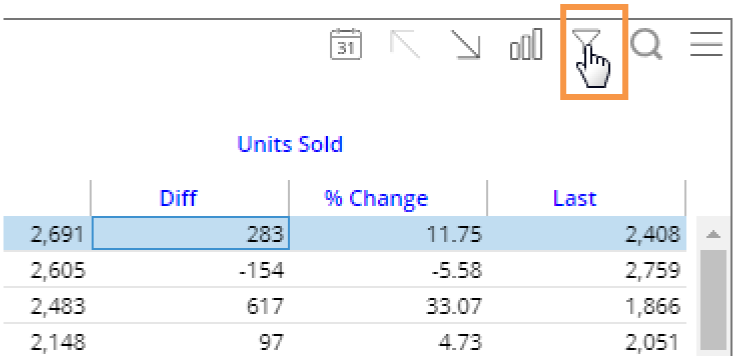
Your administrator may apply filters (via password collections and other methods) to filter the data available to you. If your account has a conditional password collection applied, then the data may be filtered in some views and not filtered in others. For example, the data may be filtered for customer-level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

Interactive widget filters

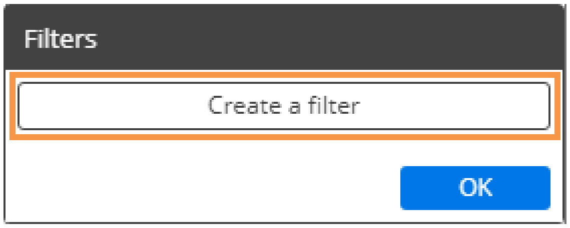
Interactive widget filters let users create filters based on pre-set dimensions. Users can select any members within those dimensions to view the corresponding data. Widget filters are available in view mode and edit mode.

To create a widget filter

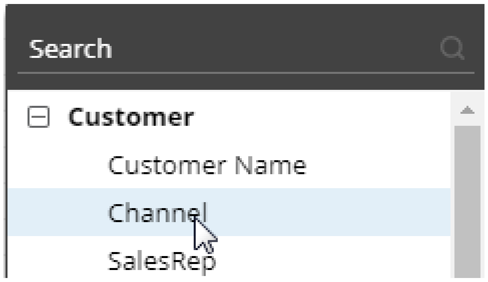
1. Click the filter button at the top of the widget (visible on mouseover).



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

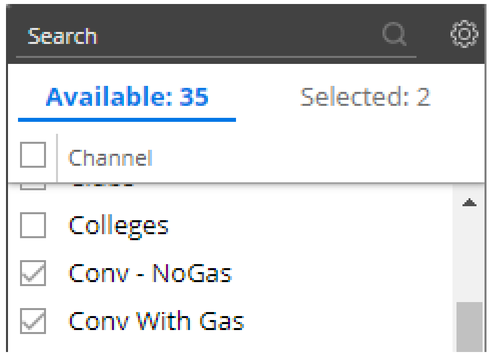


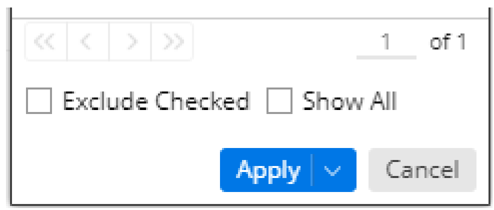
3. Select the dimension for which to create a filter. Only dimensions selected in edit mode (under Group By/Filter By) are available as widget filters.



To create a widget filter

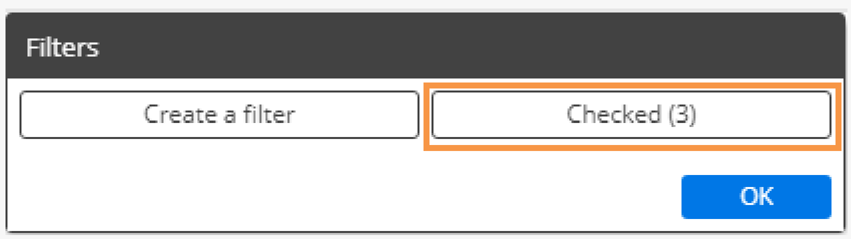
4. Checkmark the desired member(s).
5. Click **Apply** to apply the filter to the selected widget only, or click the drop-down arrow and select **Apply to Workspace** to apply the filter to all widgets in the dashboard.





Tips:

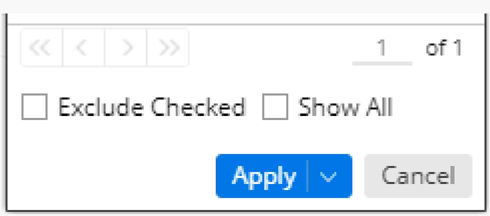
If the widget has checked members, then an option appears in the Filters dialog (Step 2) to let you filter based on the checked members.



In edit mode, you also have the option of applying a collection as a filter to the widget (Step 2).

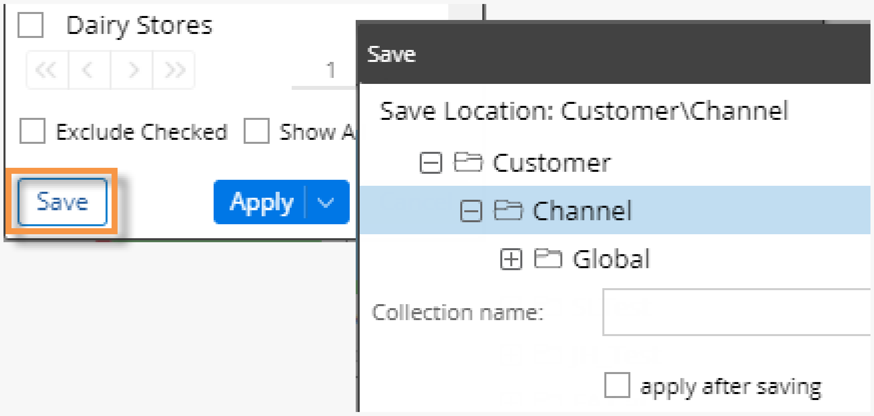
By default, the Search dialog (Step 4) shows only members with data in the current context. If you wish, you can check **Show All** to list all members.

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



Tips:

In edit mode, you can save the selected members as a collection so that you can easily re-use the filter selection. Click the **Save** button at the bottom of the Search dialog, and then select a name and location for the collection.

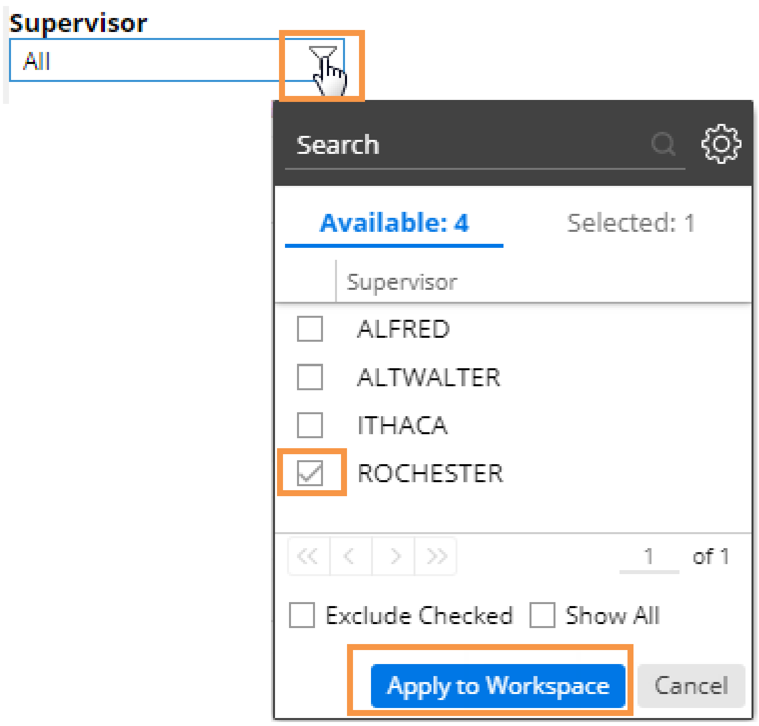


Workspace filter widgets

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

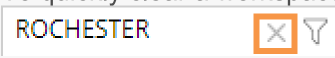
To select from a workspace filter widget

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



Tips:

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

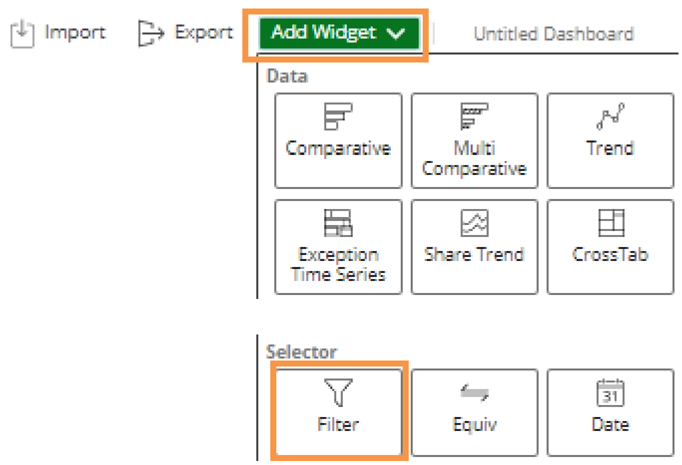


By default, the dialog only shows members with data in the current context. You can click **Show All** in the dialog to list all members.

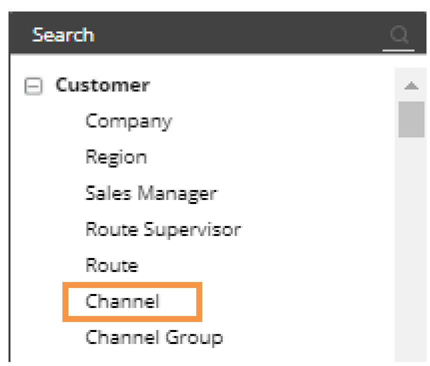
If the dashboard has multiple workspace filters, then all of the filters (including workspace filter widgets and workspace filters without a separate menu) affect each other (i.e., they filter the available members in other filters). Therefore, you may need to change a filter to All in order to select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

To add a workspace filter

1. Click the **Add Widget** button at the top of the screen.
2. Click and drag Filter onto the workspace.



3. In the pop-up window, select the dimension for which to create a filter.



4. If you want the workspace filter to open to a default member(s) when users open the dashboard, make selections (see page 35) in the filter before saving. Otherwise, the workspace filter will open to All.

Tip:

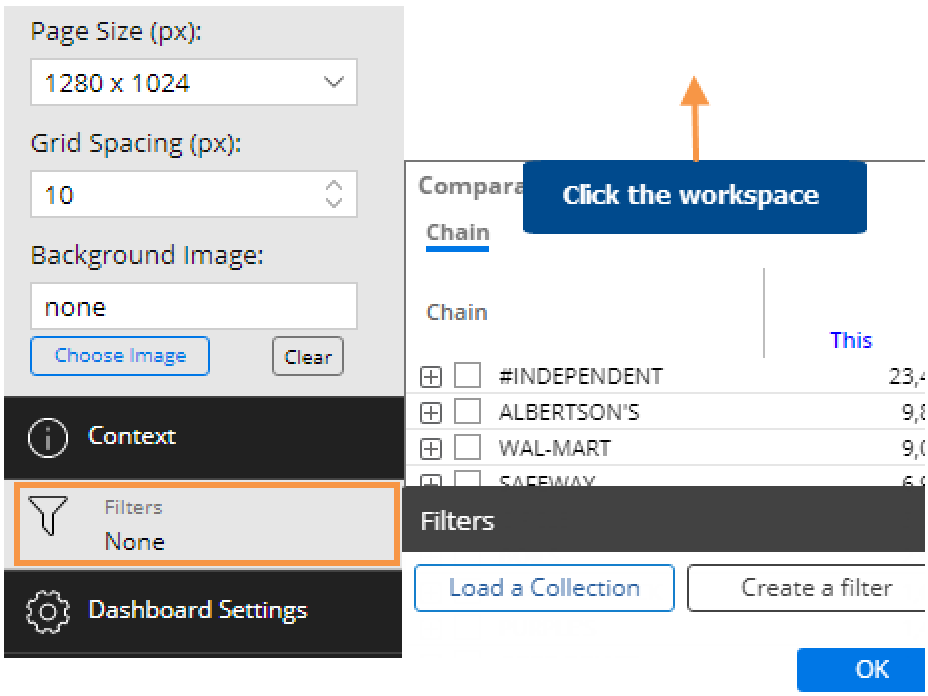
By default, all widgets use all of the applicable workspace filters included in the dashboard; however, you can turn off workspace filters for a specific widget, by clearing the **Use Workspace Filters** setting in the widget's general settings.

Workspace filters (no widget)

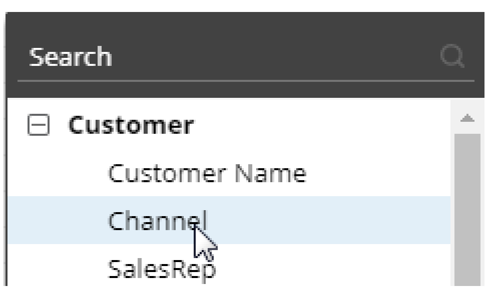
You can apply a filter to the workspace (i.e., all widgets in the dashboard) without a separate filter widget. When created in edit mode, the filter can be based on any dimension. When created in view mode, the filter can be based on any of the "Group By" dimensions.

To apply a filter to the workspace (edit mode; any dimension)

1. Click on the workspace to select it.
2. Expand the Context area of the toolkit.
3. Click on Filters.
4. In the pop-up dialog, click **Create a filte**r to select members from a dialog (see below) or click **Load Collection** to filter based on a collection.

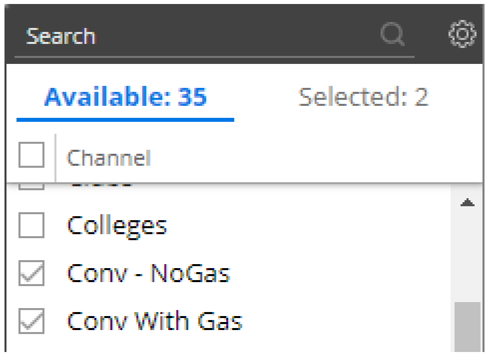


5. Select the dimension for which to create a filter.



To apply a filter to the workspace (edit mode; any dimension)

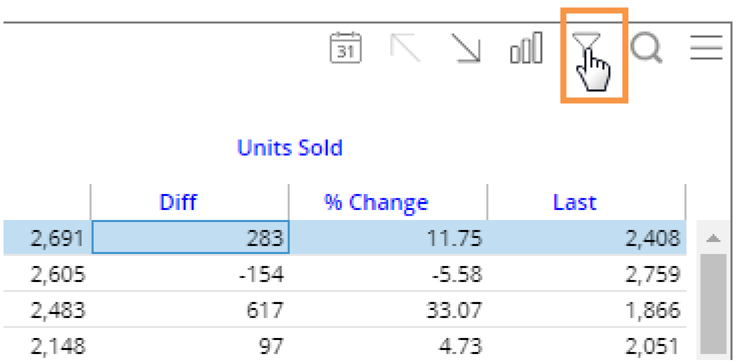
6. Select the desired member(s).



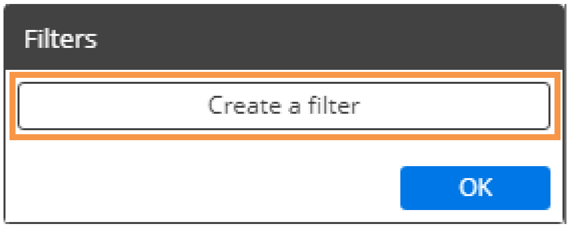
7. Click **Apply to Workspace**.

To apply a filter to the workspace (view or edit mode; only available for "Group By" dimensions)

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

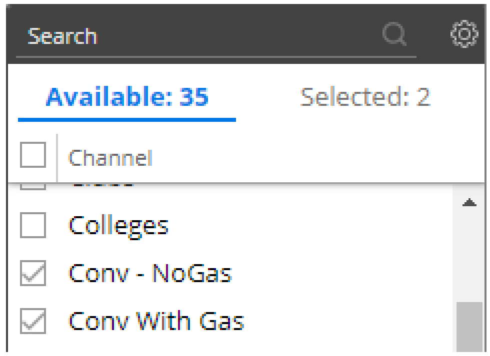


2. In the pop-up dialog, click **Create Filter**.

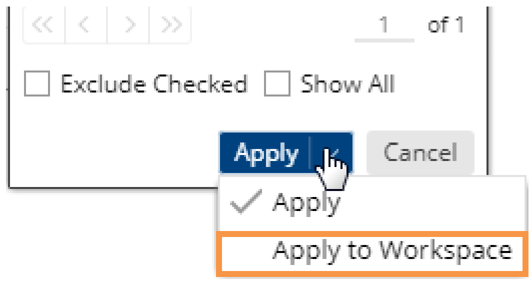


To apply a filter to the workspace (view or edit mode; only available for "Group By" dimensions)

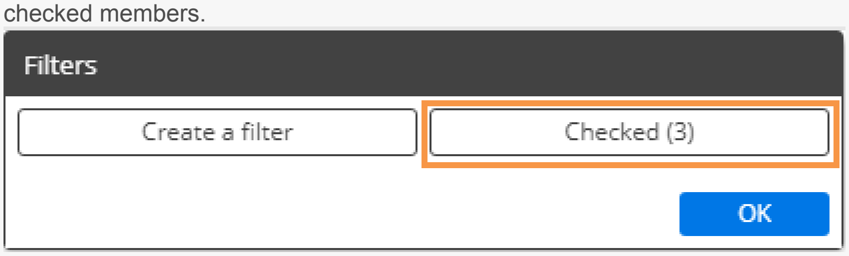
3. Checkmark the desired member(s).



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



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



Drill down

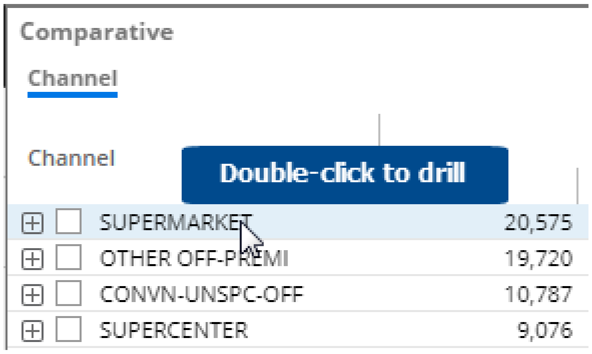
You can drill down on one or more members to filter the data in a widget. When you drill, Salient Dashboards adds a downlevel filter to the breadcrumb path.

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

To drill down on a single member

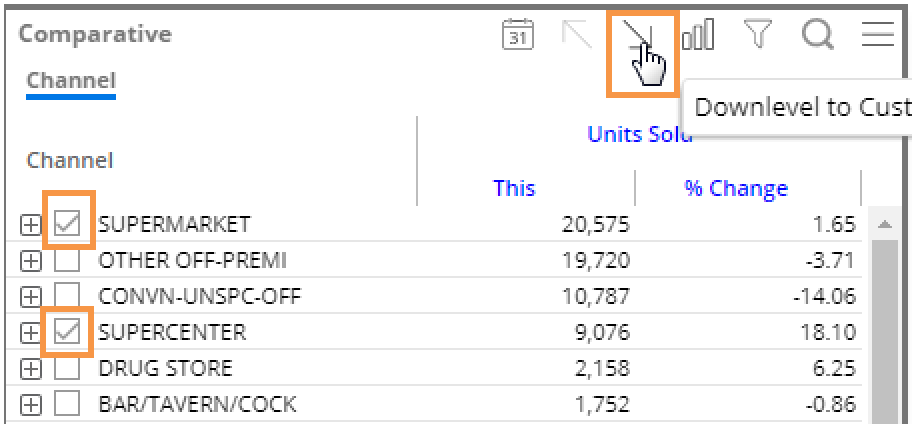
Double-click on the row, bar, pie slice, etc., representing that member.

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



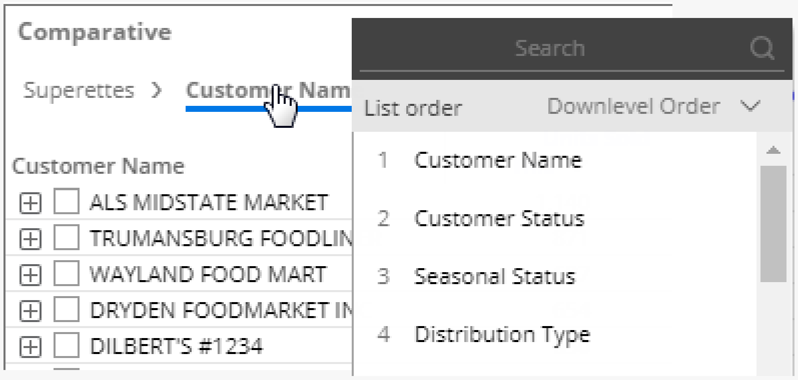
To drill down on a multiple members

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



Tips:

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



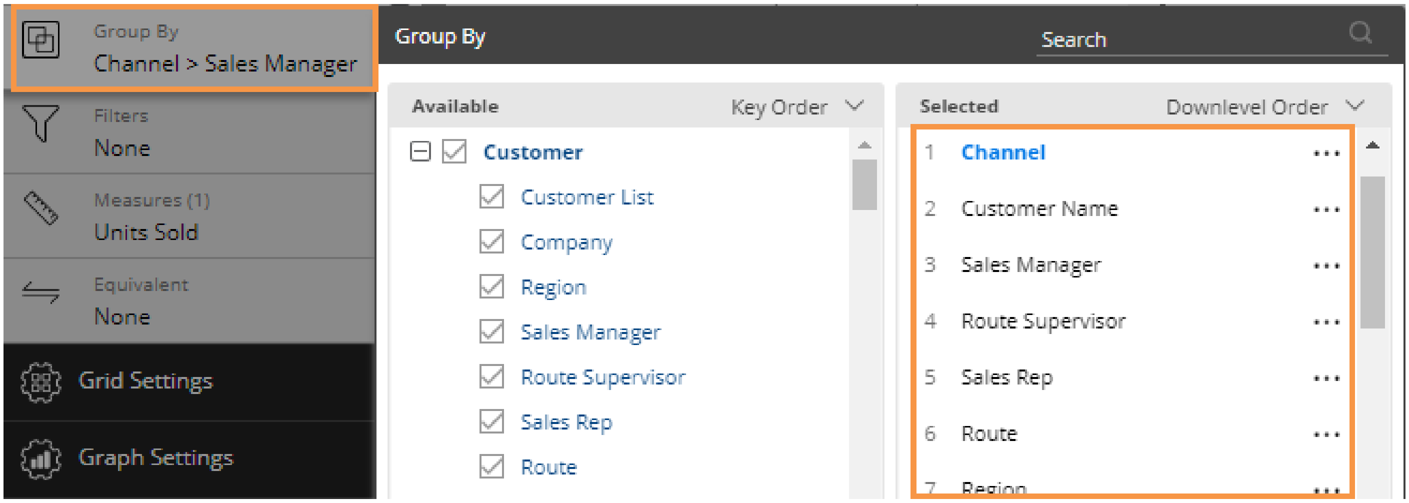
After you have drilled down, you can drill back up at any time by clicking  on the widget toolbar.

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

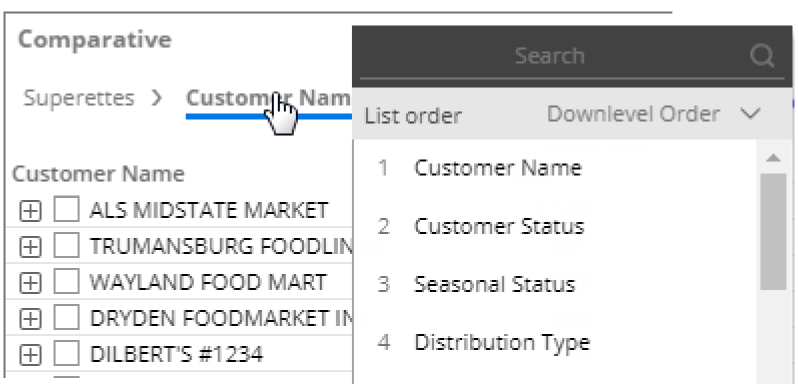
If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

Allow drilling in view mode

If you add multiple Group By dimensions (see page 27), viewers can drill down (see page 40) in view mode; therefore, the Group By should include all possible dimensions on which users should be able to drill. In addition, the Group By order controls the default drill down order. This setting is applied per widget. (Group By dimensions are not required for custom drill-downs (see page 70)).



Drilling capabilities in view mode may be different depending on the user's licensing.

Licensing	Description
Power Viewer	Users can change the By as they drill, which allows them to follow a flexible drill path within any of the Group By dimensions. 
Regular Viewer	Users must follow the preset drill path set in the Group By dialog.

Tip: Users cannot drill in non-comparative widgets (e.g., Trend, Gauge, etc.); instead, they can add filters if enabled in the **Filter By** area.

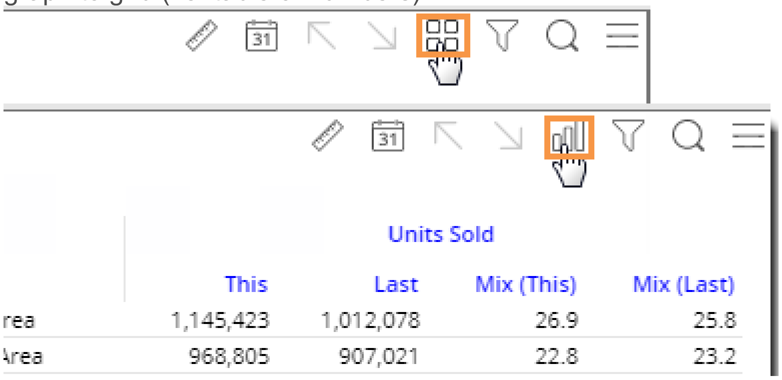
Step 6 - Customize

Switch between grid and graph formats

Various grid and graph formats are available for each analysis type. Users can also follow these same methods in view mode to switch between grids and graphs. Your selection prior to saving will be the default when users open the dashboard.

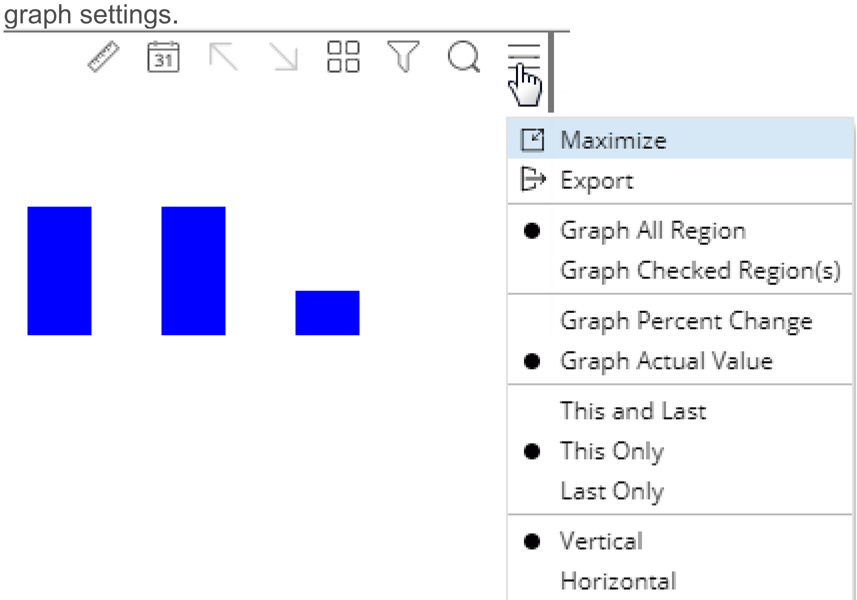
To switch between a grid and a graph

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



To select a graph format

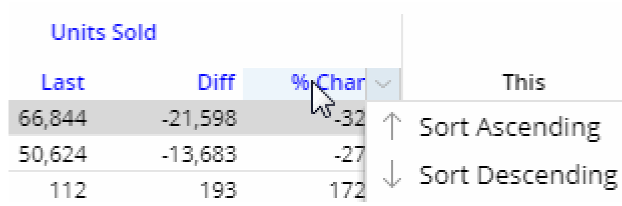
For graphs, click in the upper-right corner of the widget (visible on mouseover) to select from available graph formats for the analysis type (e.g. percent change, actual value, bar, pie, etc.). Additional options are available in graph settings.



Sort

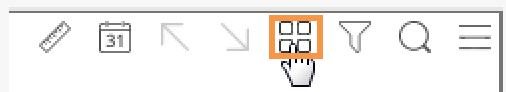
To sort

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



Tips:

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



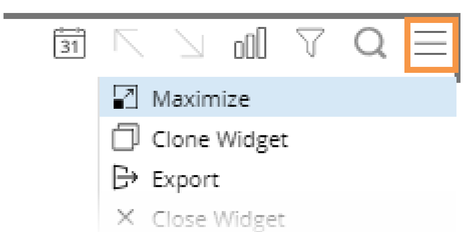
You can also click a heading to sort; click again to reverse the sort order.

Sorting is available in the following widgets:

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

Widget settings menu (edit and view modes)

You can click ☰ in the upper-right corner of a widget (visible on mouseover) to access several options. The available options depend on your rights, whether you are in view or edit mode, and the widget type.

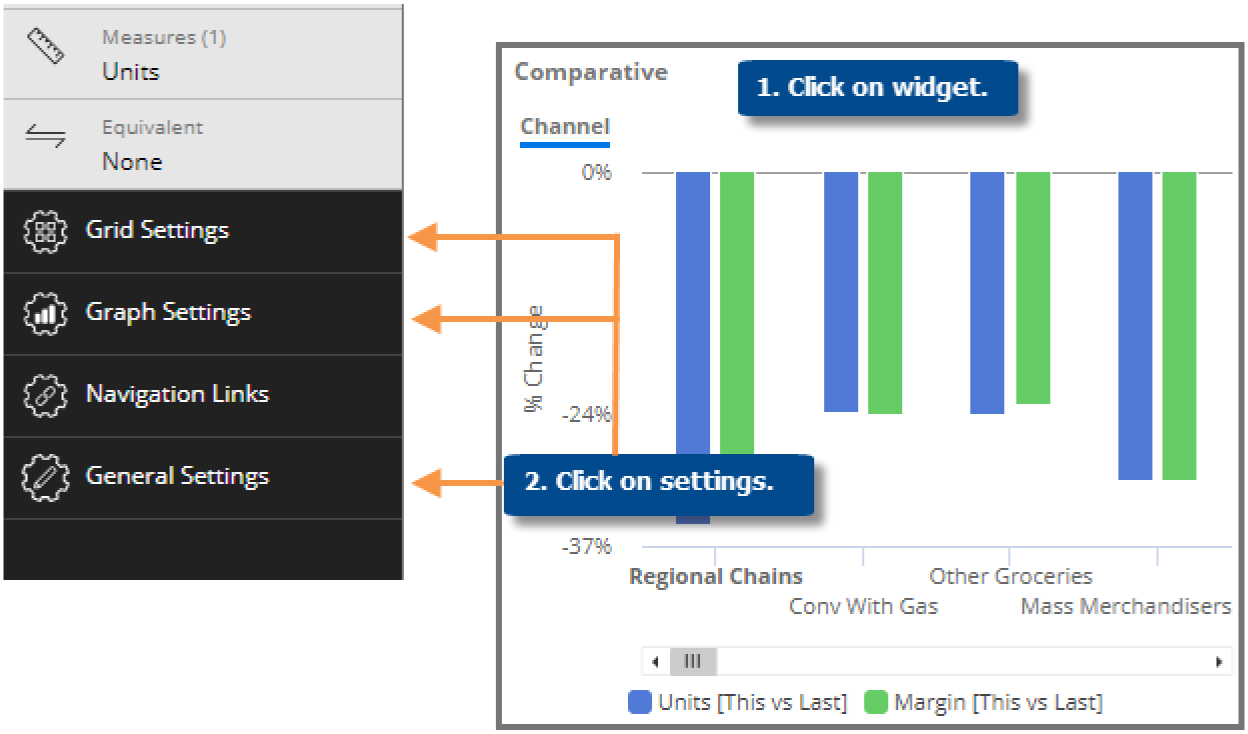


- - Maximize - Enlarges the widget to the maximum extent of the dashboard.
- - Restore Down - Returns a maximized widget to its original size.
- - Clone Widget - Create a widget exactly like the original.
- - Export
- ✕ - Close Widget
- Graph Percent Change or Actual Value (affects graphs only)
- This and Last, This Only, Last Only (affects graphs only)

- Axis Shuttle (affects graphs only; select which measures to plot along each axis)
- Doughnut, Funnel, Pie, Stacked Area, Line, etc. (i.e., graph type)

Grid, graph, and general widget settings

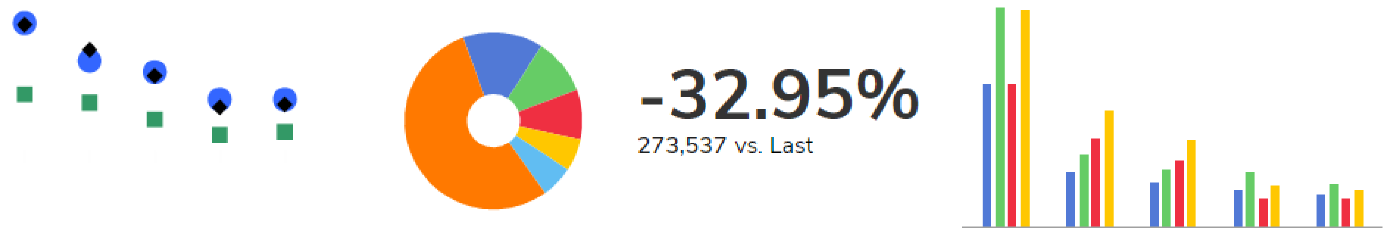
In edit mode, you can configure several widget options by clicking on the widget and then clicking one of the settings areas in the toolkit.



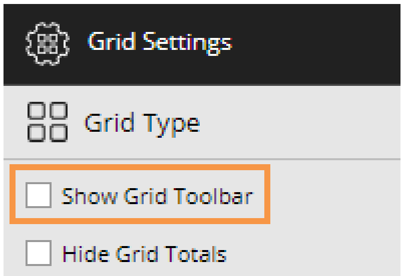
Area	Settings
Grid Settings	Grid page size, show/hide totals, grid types (e.g., scorecard), etc.
Graph Settings	Graph page size; orientation; show/hide legend, axis, labels; visual options, etc.
General Settings	Widget title, size, position, transparency, enable/disable options for view mode, etc.

Simplified widgets

In settings (located in the toolkit), you can turn off the legend, axis labels, and more, to create simplified widgets (for example, mini-widgets for optimal display on smaller devices).

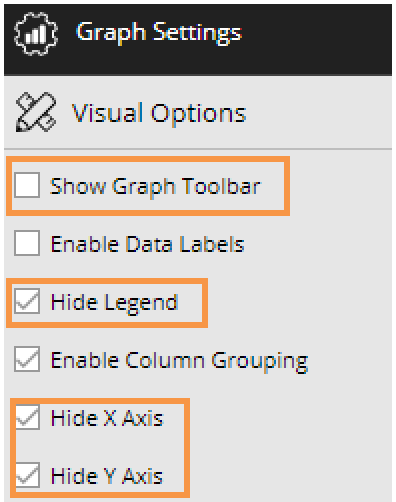


Simplified widget settings



In grid settings:

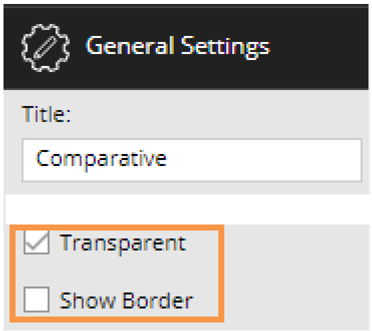
Clear the toolbar option. This will hide the paging toolbar at the bottom of the widget.



In graph settings:

Clear the toolbar option. This will hide the paging toolbar at the bottom of the widget.

Hide the legend, x axis, and y axis.



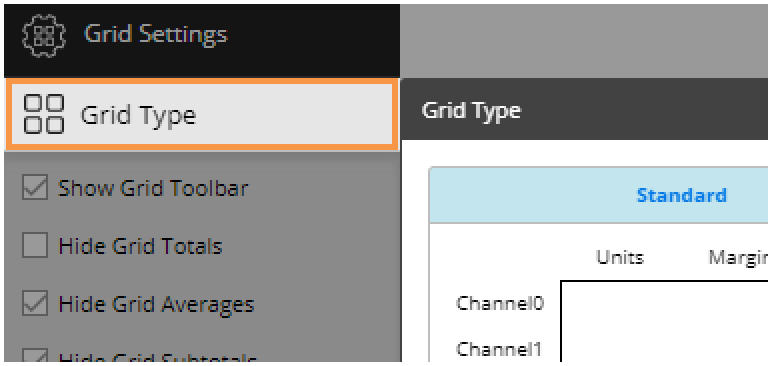
In general settings:

Turn on transparency.

Clear the border option (i.e., hide the border).

Grid types

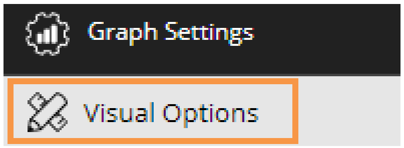
You can select from the following grid types by opening the grid settings area of the toolkit and clicking Grid Type. The available types depend on the selected widget.

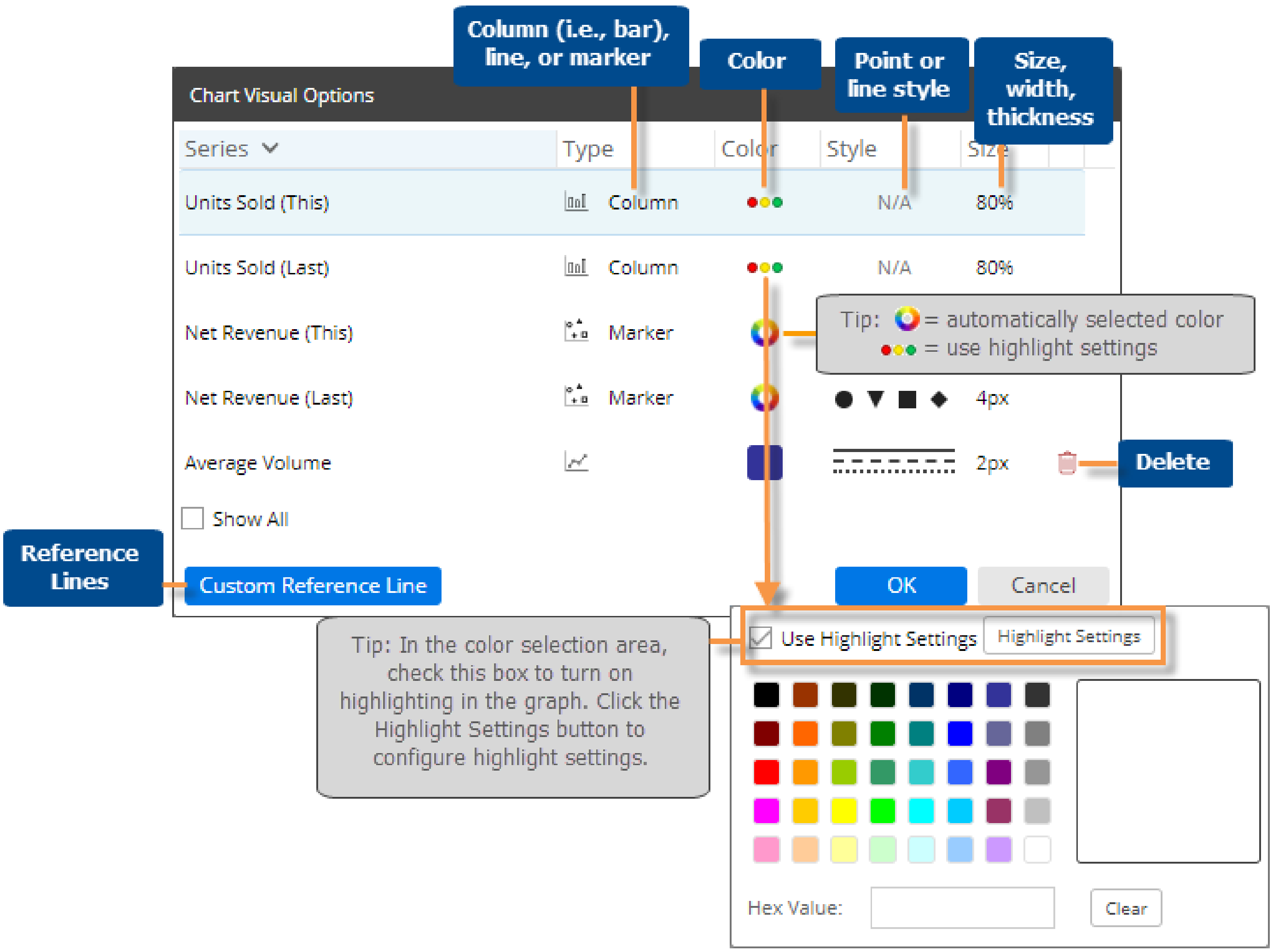


<table>
<tr><th>Grid type</th><th>Example</th></tr>
<tr><td>Standard - default row and column layout</td><td>
<table>
<tr><td></td><td colspan="4">Units Sold</td></tr>
<tr><td>Region</td><td>This</td><td>Last</td><td>Diff</td><td>% Change</td></tr>
<tr><td>SouthEast Area</td><td>1,145,423</td><td>1,012,078</td><td>133,345</td><td>13.18</td></tr>
<tr><td>SouthWest Area</td><td>968,805</td><td>907,021</td><td>61,784</td><td>6.81</td></tr>
<tr><td>East Area</td><td>896,578</td><td>835,065</td><td>61,513</td><td>7.37</td></tr>
<tr><td>NorthWest Area</td><td>887,050</td><td>822,603</td><td>64,447</td><td>7.83</td></tr>
</table>
</td></tr>
<tr><td>Swapped - switches rows and columns</td><td>
<table>
<tr><td></td><td>Region</td><td>SouthEast Area</td><td>SouthWest Area</td></tr>
<tr><td rowspan="4">Units Sold</td><td>This</td><td>1,145,423</td><td>968,805</td></tr>
<tr><td>Last</td><td>1,012,078</td><td>907,021</td></tr>
<tr><td>Diff</td><td>133,345</td><td>61,784</td></tr>
<tr><td>% Change</td><td>13.18</td><td>6.81</td></tr>
</table>
</td></tr>
<tr><td>Scorecard - measures in rows and formats (This, Last, difference, etc.) in columns; does not compare members</td><td>
<table>
<tr><td></td><td>This</td><td>Last</td><td>Diff</td><td>% Change</td></tr>
<tr><td>Units Sold</td><td>4,257,862</td><td>3,915,236</td><td>342,626</td><td>8.75</td></tr>
<tr><td>Net Revenue</td><td>38,565,105</td><td>35,313,796</td><td>3,251,310</td><td>9.21</td></tr>
</table>
</td></tr>
<tr><td>Scorecard swapped - measures in columns and formats (This, Last, difference, etc.) in rows; does not compare members</td><td>
<table>
<tr><td></td><td>Units Sold</td><td>Net Revenue</td></tr>
<tr><td>This</td><td>4,257,862</td><td>38,565,105</td></tr>
<tr><td>Last</td><td>3,915,236</td><td>35,313,796</td></tr>
<tr><td>Diff</td><td>342,626</td><td>3,251,310</td></tr>
<tr><td>% Change</td><td>8.75</td><td>9.21</td></tr>
</table>
</td></tr>
</table>

Visual options

To customize a graph, you can make the following selections in the **Visual Options** area. These options depend on the widget type. To access these options, click on Graph Settings in the toolkit and then click Visual Options. Then click in the column/row of the item you want to customize.





Text and HTML widgets

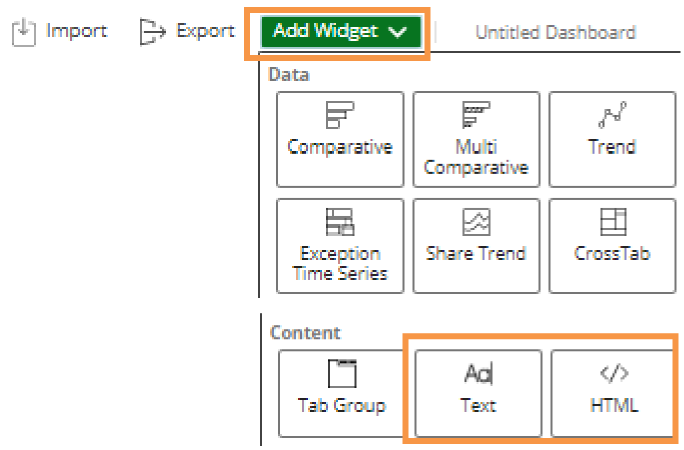
Text and HTML widgets show text or other content. These widgets can include hyperlinks and embedded content from other web pages. The only difference between HTML and text widgets is that the default editor is source (i.e., code) mode for HTML widgets and WYSIWYG mode (i.e., formatting controls) for content widgets; however, you can switch between these modes for both types of widgets.

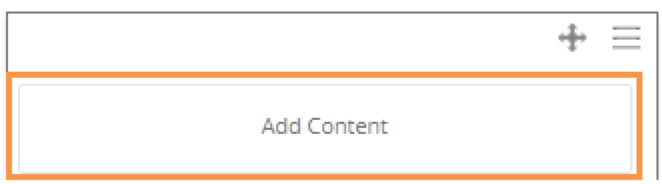
Due to the flexibility of text and HTML content widgets, we cannot guarantee their appearance, especially for information pasted into the editor, on all browsers. As always, you should preview a dashboard before publishing it.

To add a text or HTML widget

1. Click the 

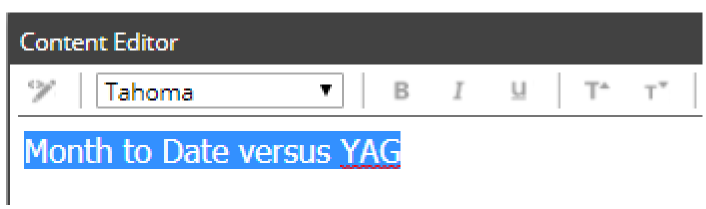
 button at the top of the screen.
2. In the pop-up window, click and drag Text or HTML onto the workspace, depending on your preferred edit mode (WYSIWYG for text or source code for HTML).
3. Click **Add Content** in the widget, or click the  button at the top of the widget and then select **Edit**.





5. Depending on the edit mode, enter text or HTML code into the **Content Editor**. To switch between modes, click  on the Content Editor toolbar.

Content Editor (WYSIWYG mode):



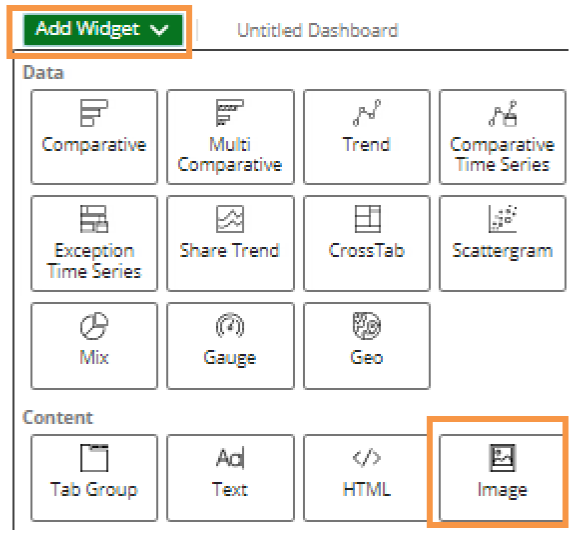
Content Editor (source edit mode):

Image widgets

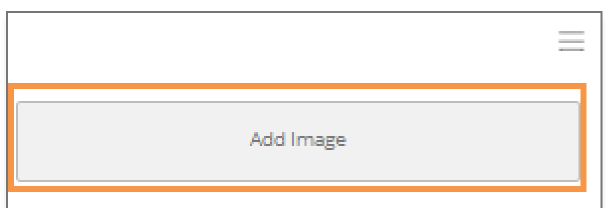
Image widgets allow you to add images to a dashboard. The Image Manager stores all images used in dashboards and allows all Salient Dashboards users to upload and access them while in edit mode.

To add an image

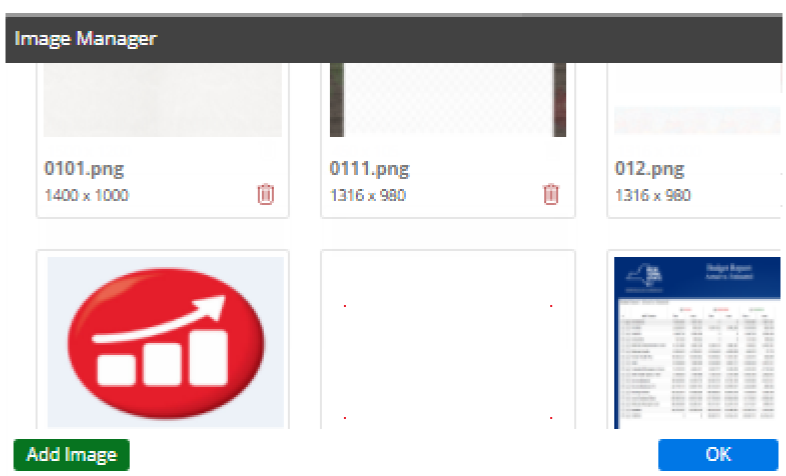
1. Click the Add Widget button at the top of the screen.
2. In the pop-up window, click and drag Image onto the workspace.



3. Click **Add Image** in the widget, or click the button at the top of the widget and then select **Edit**.

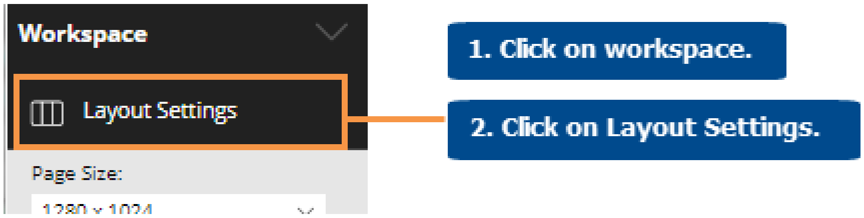


4. In the Image Manager, select an image or click Add Image to upload a new image. The image file type must be supported by the web browser used.
5. Click OK.



Layout settings

Layout settings allow you to control the dashboard size, workspace grid spacing, and background image. To access layout settings, select the workspace (i.e., not a widget) and go to Layout Settings the toolkit.

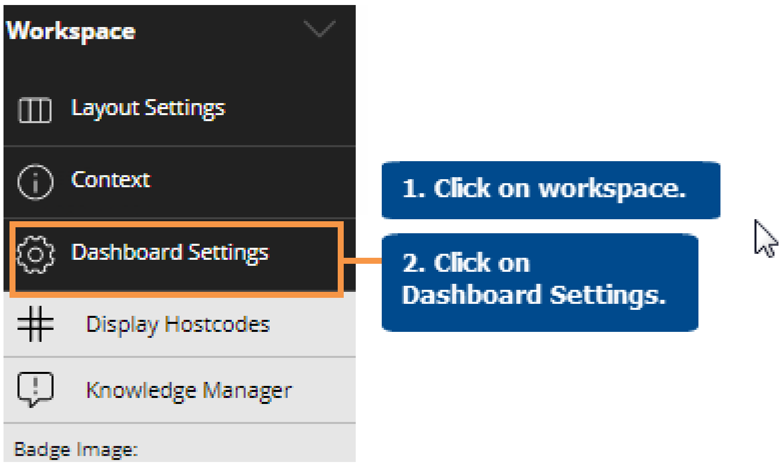


Setting	Explanation
Page size	Select the width and height in pixels of the dashboard.
Grid spacing	Salient Dashboards snaps widgets to a grid when you move or resize them. Enter the **Grid Spacing** (i.e., number of pixels between grid points).
Background image	Optionally, select a background image for the dashboard. Otherwise, the background is white. The dashboard will repeat the background image for the dashboard page size.

Tip: If you want to reuse layout settings in new dashboards, you can apply the desired settings to a blank dashboard and then set that dashboard as the home dashboard so that new dashboards will use the settings.

Dashboard settings

Dashboard settings allow you to control a variety of options for the dashboard, such as a badge image, available export options, etc. To access dashboard settings, select the workspace (i.e., not a widget) and go to Dashboard Settings the toolkit.



Setting	Explanation
Display Hostcodes	If you wish, you can display dimension member codes along with or instead of their descriptions throughout Salient Dashboards.
Knowledge Manager	Click **Knowledge Manager** to select settings for the Knowledge Manager panel.
Badge Image	Optionally, select an image to represent the dashboard in the dashboard portal. Otherwise, the portal displays a general image based on the upper-left widget type as the dashboard thumbnail.
Export	Select the format for exporting data when the user clicks the Export button on the title bar of a widget. In addition to this setting, you can disable exporting for any widget in its settings.
Allow Spawning	Check this box if you want users to be able to create new widgets by clicking or double-clicking.
Show Standard Widget Title	Check this box to include the standard text describing the widget's timeframe after the widget title. (The widget title is defined in the widget's general settings.)
Add Cube Name to Data Field	Check this box to display the name of a data cube from which the measure originates in measure headings and the Measures area.

Tip: If you want to reuse dashboard settings in new dashboards, you can apply the desired settings to a blank dashboard and then set that dashboard as the home dashboard so that new dashboards will use the settings.

Step 7 - Save and Share

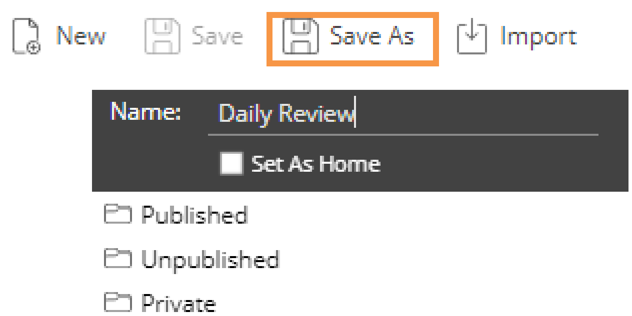
Save and publish dashboards

We recommend saving dashboards frequently to avoid losing any changes.

A dashboard must be published to be available in view mode and the Salient Mobile app. To publish a dashboard, simply save it under the Published folder or one of its subfolders. We recommend previewing a dashboard in view mode (click View on the toolbar) prior to publishing it.

To save a dashboard

1. On the dashboard toolbar, click Save As to save a new dashboard, or click Save to save changes to an existing dashboard.
2. At the top of the pop-up window, type a dashboard name.
3. In the dashboard tree, select one of the following folders or a subfolder within it. You may need to expand a folder (single-click) in order to see its subfolders.



Published - Select this location to publish the dashboard so that it is available to other users in view mode and the Salient Mobile app.

Unpublished - This option makes the dashboard global so that it is available to other users in edit mode but not in view mode. .

Private - This option makes the dashboard private so that you are the only user who can access it until it is published.

4. Click **OK**.

Tips:

Saving dashboards in Published or Unpublished (i.e., global) folders requires special rights assigned by your administrator.

You can check the **Set as Home** box to make this dashboard the home dashboard for Salient Dashboards.

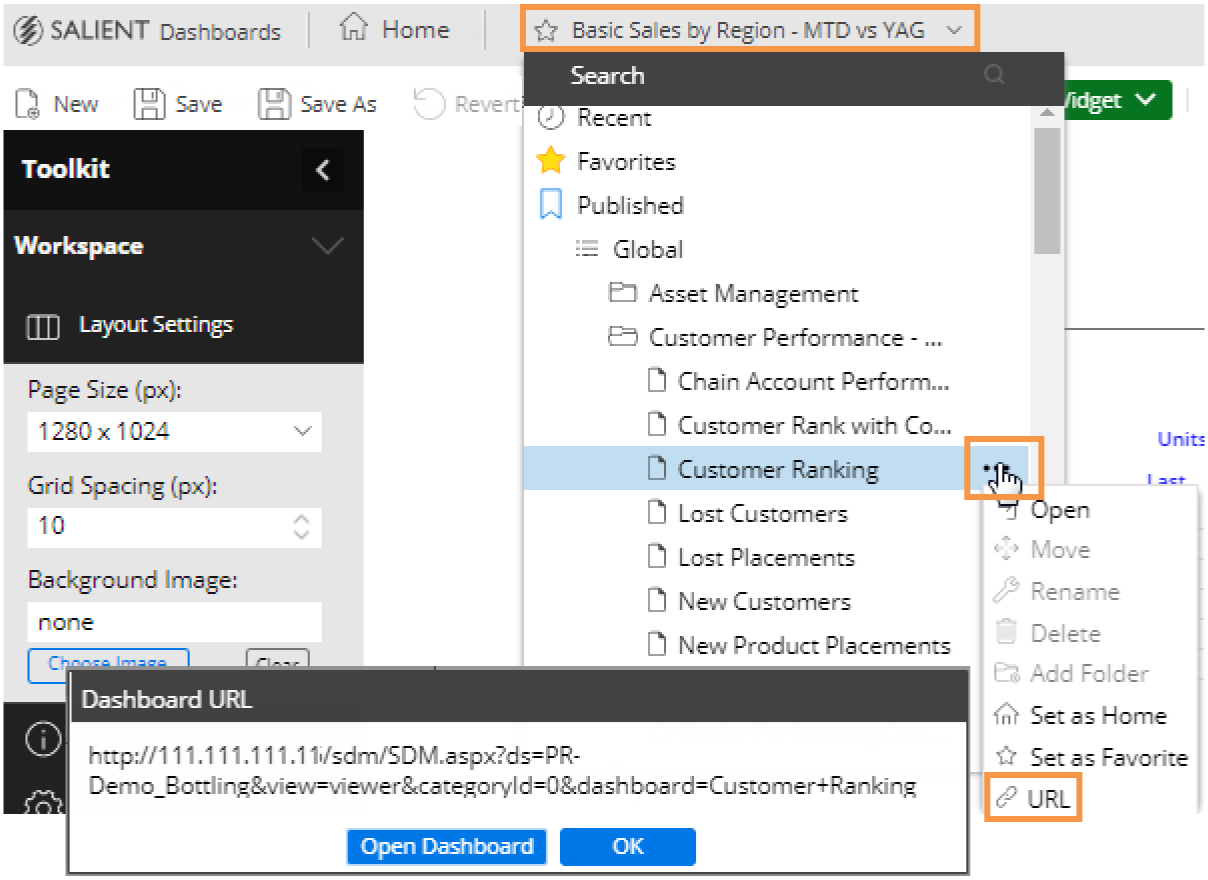
Once a dashboard is published, it is available to users via the dashboard portal, dashboard tree (in view or edit mode), and Salient Mobile app. In addition, you can access the dashboard's URL (see page 54) and then share it with users to allow them to go directly to the dashboard.

Access a published dashboard's URL

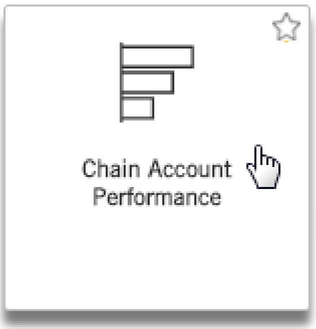
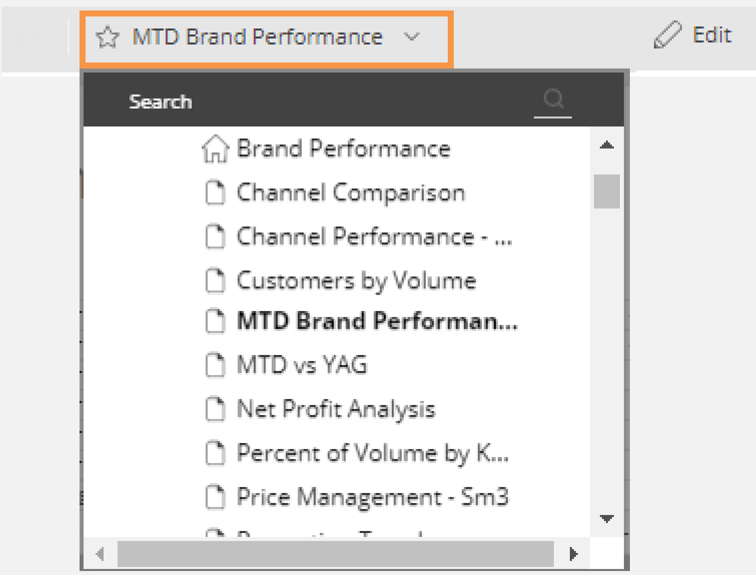
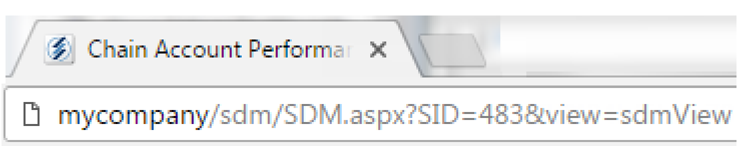
You may want to share the URL of a dashboard with users so that they can access it directly. A dashboard URL also allows you to link to a dashboard from a web page and/or save the dashboard as a bookmark in your browser. For any of these options, you need to know the URL of the dashboard. A dashboard must already be published (see page 53) to access its URL.

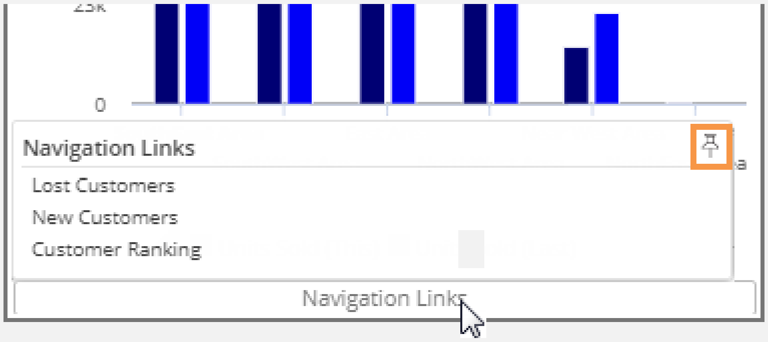
To access a published dashboard's URL

1. Click the drop-down at the top of the screen to open the dashboards menu.
2. Under Published, locate the dashboard and place the cursor over it.
3. Click the ... button that appears.
4. In the pop-up menu, select URL.
5. A dialog shows the URL of the dashboard. You can copy and paste it into an email program or another application.



How users can access published dashboards

<table>
<tr><th>Option</th><th>Explanation</th></tr>
<tr><td>Portal

</td><td>Log in and then click on a dashboard icon in the portal (see page 8) to open it in view mode. You can then switch to edit mode if you have the necessary rights.</td></tr>
<tr><td>Dashboards menu

</td><td>1. In edit mode or view mode, click the dashboards drop-down button at the top of the screen. If a dashboard is already open, this button displays its name.
2. In the pop-up window, you can search for a dashboard or open a dashboard category and folder to find a dashboard.
3. Click on the dashboard you want to open.</td></tr>
<tr><td>URL

</td><td>Go directly to a specific dashboard by entering its URL or marking it as a favorite in your browser. You may be required to log in. Your administrator or other users may share dashboard URLs with you or provide links using other methods such as a web page.</td></tr>
</table>

Option	Explanation
Embedded dashboard links 	A widget may have pre-configured links (see page 76) to other dashboards via a button or panel.
Mobile app 	Access dashboards through the mobile app for optimal viewing on mobile devices. Additional installation and setup is required.

Types of Analysis Widgets

You can choose from various modes of analysis depending on what you want to find out about the data and how you want to display it. Most analysis types are available as either a numbers grid or graph.

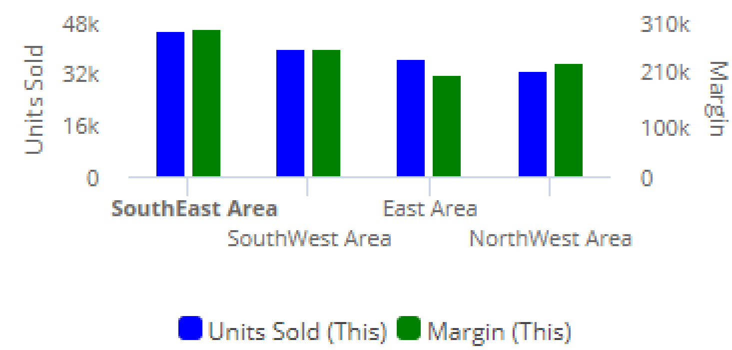
<table>
<tr><th>Analysis type</th><th>Examples</th></tr>
<tr><td>

Comparative

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

</td><td>

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



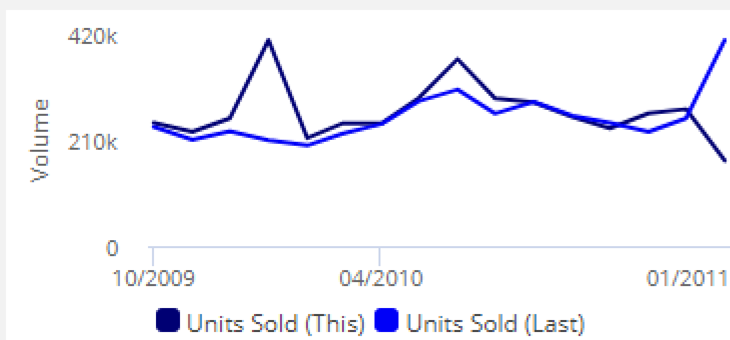
</td></tr>
<tr><td>

Comparative Time Series

Trend over time for two date ranges; any number of measures

Tip: This option in the Add Widget menu adds a Trend widget for two date ranges (This and Last).

</td><td>



</td></tr>
</table>

Analysis type	Examples

Crosstab

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

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

Multi Comparative

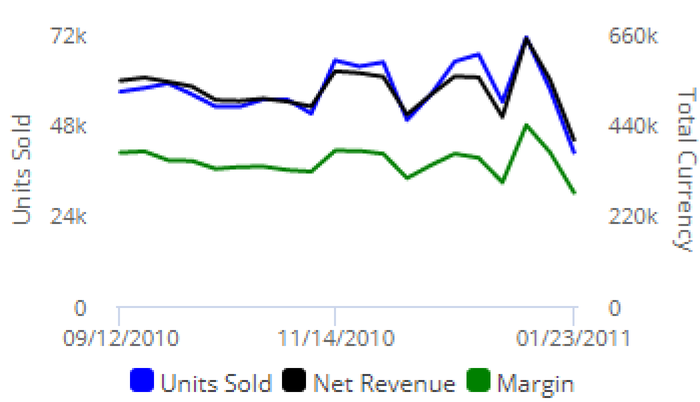
Comparison of members for any number of date ranges; any number of measures

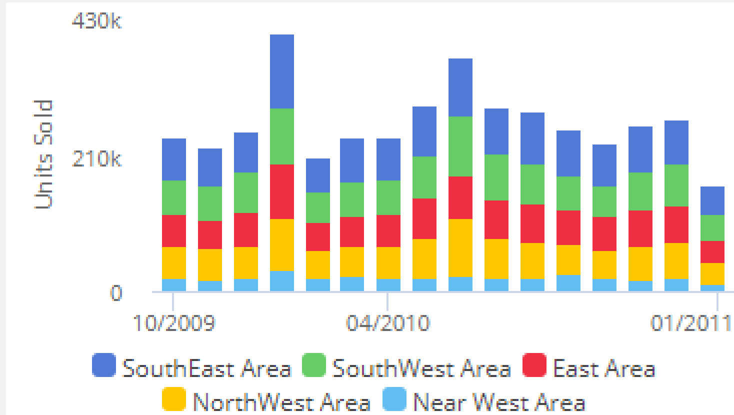
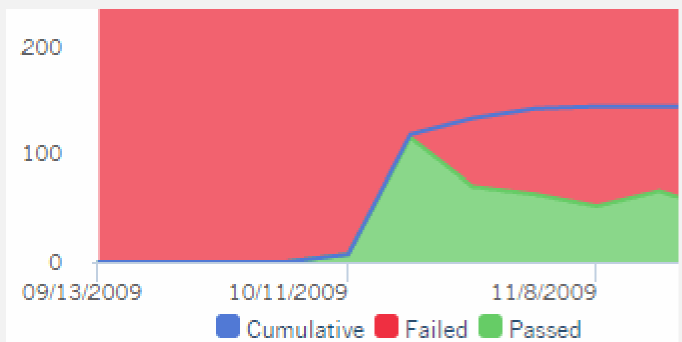
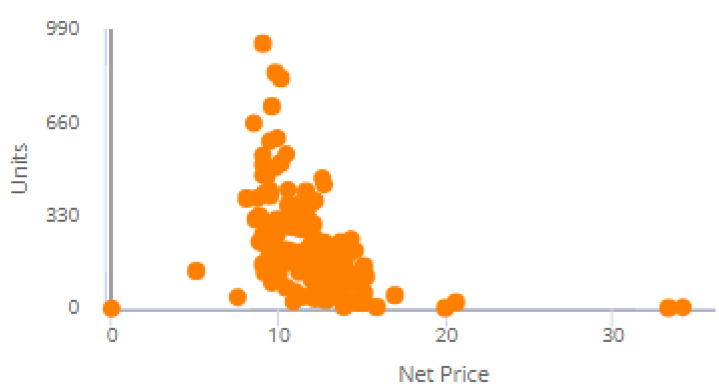
	Month To Date vs. YAG		Last Year vs. YAG	
	Units Sold		Units Sold	
Region	This	% Change	This	Last
SouthEast Area	45,246	-32.31	910,342	772,763
SouthWest Area	40,085	-28.63	762,082	696,724
East Area	36,941	-27.03	706,588	642,115
NorthWest Area	32,800	-37.14	703,359	627,379
Near West Area	13,269	-38.08	279,479	247,536
NorthEast Area	305	172.32	5,114	8,631
Total (6)	168,646	-31.82	3,366,964	2,995,148

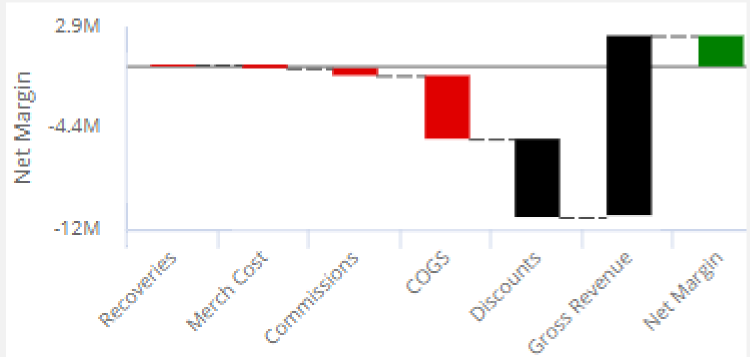
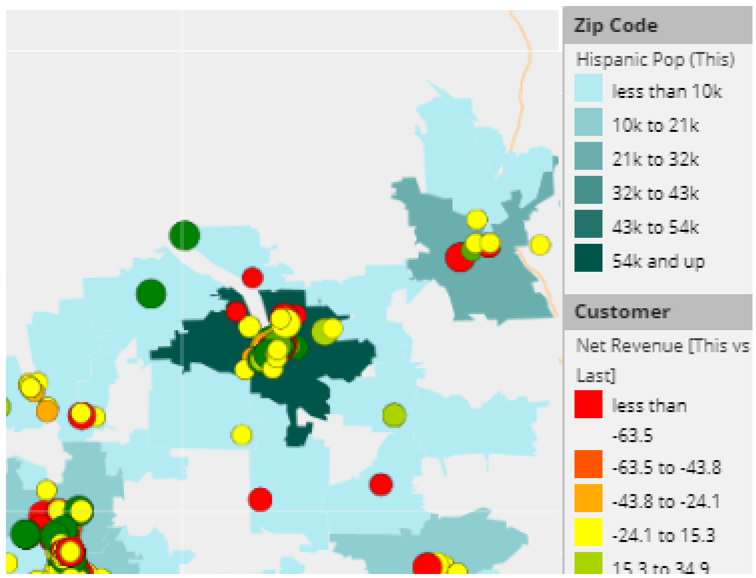
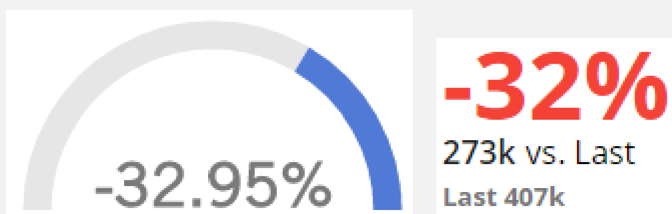
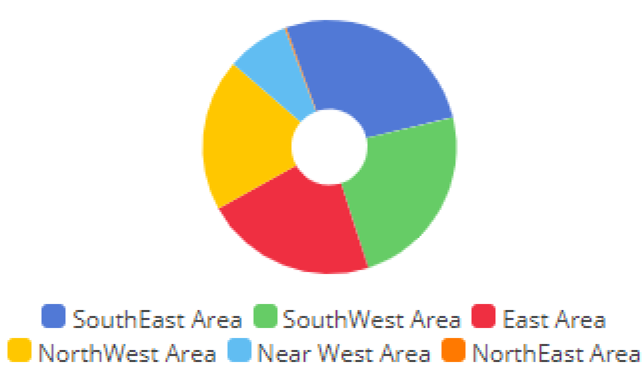
Trend

Trend over time for one or two date ranges for multiple measures

Tip: This option in the Add Widget menu adds a Trend widget for one date range (This).



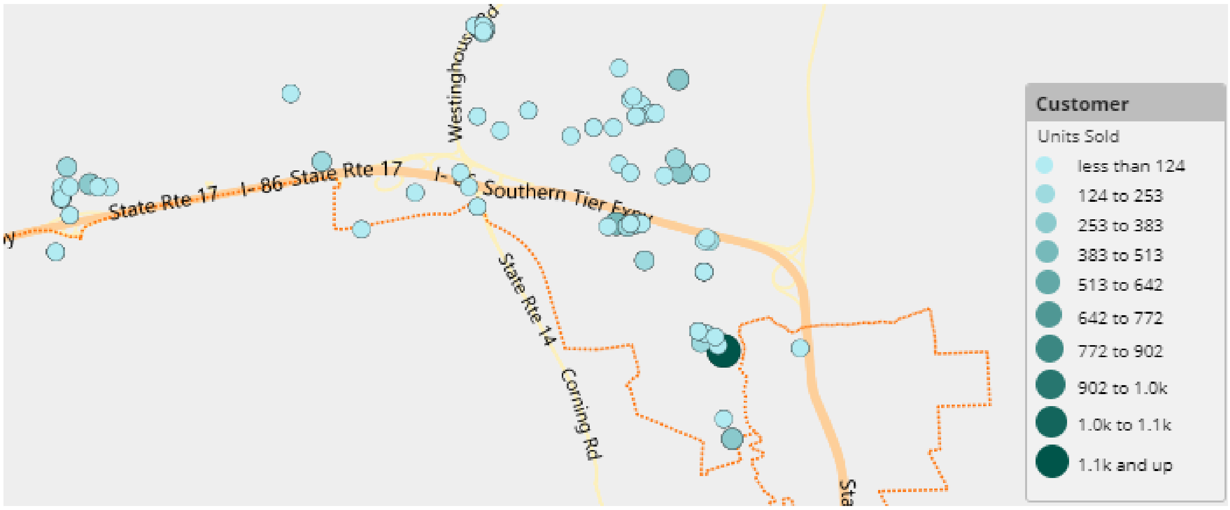
<table>
<tr><th>Analysis type</th><th>Examples</th></tr>
<tr><td>Share Trend
Comparison trend for multiple members; either actual values or percent of the total for single measure</td><td>
</td></tr>
<tr><td>Exception
Pass and fail of key members for an exception test (e.g., customers with units >=1)</td><td>
<table>
<tr><th>Channel</th><th>Totals</th><th>Passed</th><th>% Passed</th><th>Failed</th><th>% Failed</th></tr>
<tr><td>All Othr On Premise</td><td>1,122</td><td>69</td><td>6.1</td><td>1,053</td><td>93.9</td></tr>
<tr><td>Industrial</td><td>578</td><td>206</td><td>35.6</td><td>372</td><td>64.4</td></tr>
<tr><td>Schools</td><td>459</td><td>206</td><td>44.9</td><td>253</td><td>55.1</td></tr>
<tr><td>Recreation</td><td>444</td><td>55</td><td>12.4</td><td>389</td><td>87.6</td></tr>
<tr><td>Restaurants</td><td>411</td><td>161</td><td>39.2</td><td>250</td><td>60.8</td></tr>
<tr><td>Fast Food</td><td>395</td><td>166</td><td>42.0</td><td>229</td><td>58.0</td></tr>
<tr><td>Other Groceries</td><td>283</td><td>161</td><td>56.9</td><td>122</td><td>43.1</td></tr>
<tr><td>Colleges</td><td>262</td><td>28</td><td>10.7</td><td>234</td><td>89.3</td></tr>
<tr><td>Bars / Taverns</td><td>212</td><td>101</td><td>47.6</td><td>111</td><td>52.4</td></tr>
<tr><td>Total (38)</td><td>5,863</td><td>1,915</td><td>32.7</td><td>3,948</td><td>67.3</td></tr>
</table>
</td></tr>
<tr><td>Exception Time Series
Pass and fail of key members for an exception test over time</td><td>
</td></tr>
<tr><td>Scattergram
Plot of key members (e.g., customers) for two measures to show trends and outliers</td><td>
</td></tr>
</table>

Analysis type	Examples
Waterfall How the components of a calculated measure affect its make-up	
Geo Map showing data values and/or change since another date range	
Gauge A simple visual tool showing performance; single measure	
Mix Percent of the total for multiple members for one or two date ranges; any number of measures	

Advanced Concepts

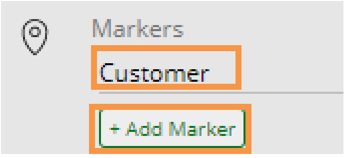
Geo

The Geo widget is a map that provides geospatial intelligence (requires additional installation and setup). The map typically has markers that represent member locations (e.g., customer locations). The color and/or size of markers can indicate data values, difference, or percent change (e.g., large dark circles represent customers with high volume).



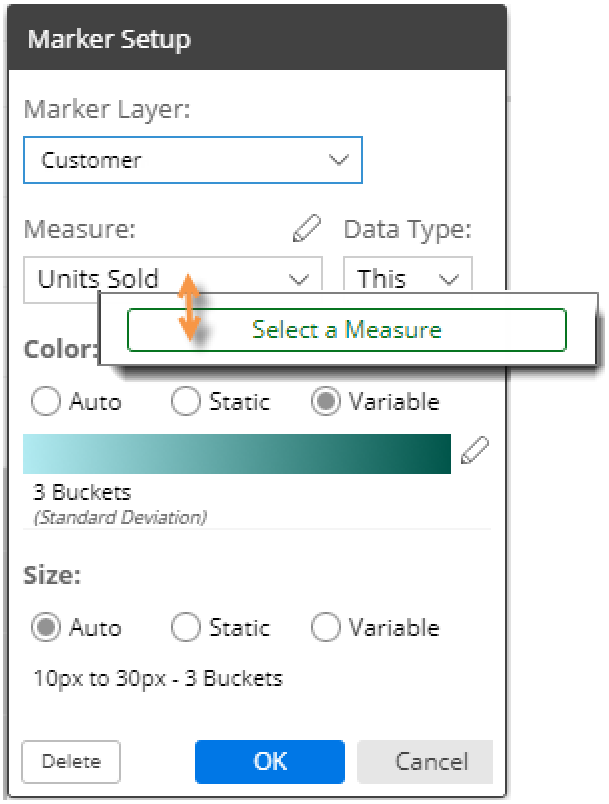
To set up a geo point map colored and sized by measure

1. After adding a Geo widget, access marker setup by clicking **Add Marker** under **Markers** in the toolkit. (If you have already added the marker, you can click on its name to edit it.)
2. In the **Marker Setup** dialog, select the following settings.



Tip: Power Viewer users will be able to change the marker setup by clicking on the map legend.

To set up a geo point map colored and sized by measure



Marker Layer - Select the key or dimension to plot on the map (e.g., Customer).

Measure - Click **Select a Measure** to add the measure, or select from the **Measure** drop-down menu if measures have already been added.

Data Type - Select values (This or Last), Diff, % Change, etc.

Point color - Select from the following.

- Auto - Markers are colored in shades of teal based on data; uses the default number of equally-sized buckets (i.e., ranges); requires no additional setup.
- Static - uses the same color/shade for all points regardless of data.
- Variable - (see the following instructions) Allows you to choose the range selection method, colors, and number of buckets.

Point size - Select from the following.

- Auto - Markers are sized based on data; uses the default number of equally-sized buckets; requires no additional setup.
- Static - uses the same point size for all markers regardless of data.
- Variable - (see the following instructions) allows you to choose the range selection method, pixel size, and number of buckets.

Tip: If you customize one of these options (variable color or variable size) and use Auto for the other, then the Geo map uses the customized options for both color and size.

Variable (i.e., customized) point color and size options

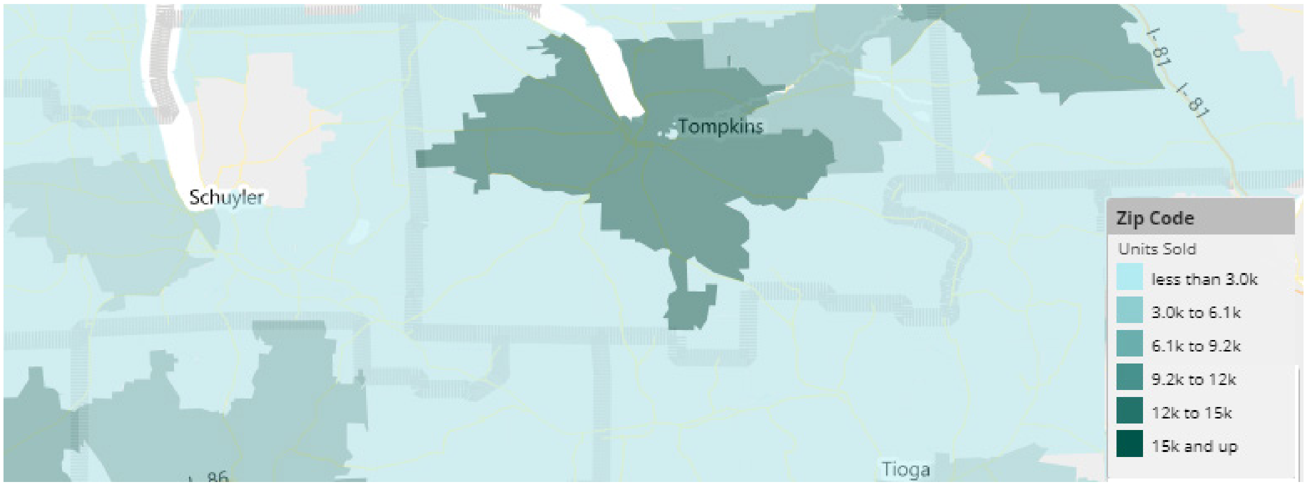
The variable color and size options in Geo allow you to do any of the following:

- Select the number of buckets (e.g., 4 ranges of volume sold)
- Select how the ranges are determined (standard deviation or equal size)
- Select a color gradient (2 or 3 color stops)
- Select a range of point size in pixels
- Use different measures or data types for color and size (e.g., size based on values and color based on percent change)

To access these options, choose the variable option in the Marker Setup dialog.

Geo area map colored by measure

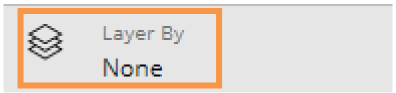
Geo maps can shade areas based on data totals, data averages, percent change, or difference, for each area within a layer. The map can overlay points (see page 61) on the colored areas, or you can view the area map without points. For example, view zip codes by units sold (darker areas have higher values).

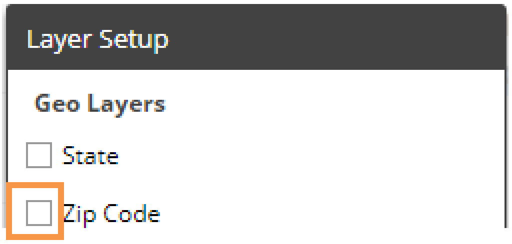


To set up a geo area map colored by measure

1. After adding a Geo widget, access layer setup by clicking **Layer By** in the toolkit.
2. In the **Layer Setup** dialog, check the box of the layer for which want to color areas. Only pre-configured spatial layers are available for selection.
3. Select from the following options.

Tip: Power Viewer users will be able to change the layer setup by clicking on the map legend.





To set up a geo area map colored by measure

Measure - Click **Select a Measure** to add the measure, or select from the **Measure** drop-down menu if measures have already been added.

Data Type - Select values (This or Last), Diff, % Change, etc.

If you want to customize the colors and number of buckets, select from the following options.

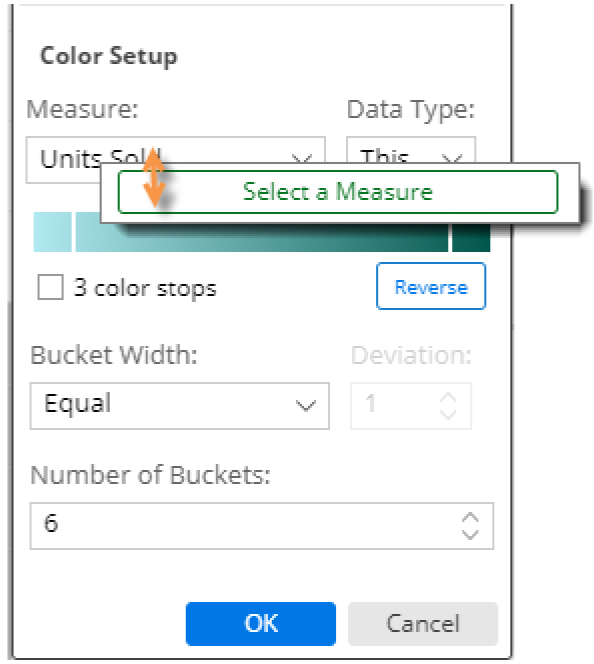
3 color stops - Optionally, use three color stops to define the lowest, average, and highest data points with a gradient in-between. Or, leave this option cleared to use a two-color gradient.

Colors - Click each stop in the color bar to define the color. You can also click **Reverse** to reverse the colors.

Bucket Width - Select the method for determining the ranges:

- Standard deviation - centers the ranges around the mean.
- Equal - creates a defined number of equally-sized ranges between the minimum and maximum values.

Number of Buckets - Select the number of buckets (i.e. ranges) to show. If equal is selected, this will be the total number of buckets. If standard deviation is selected, this number of buckets will be present both above and below the mean.

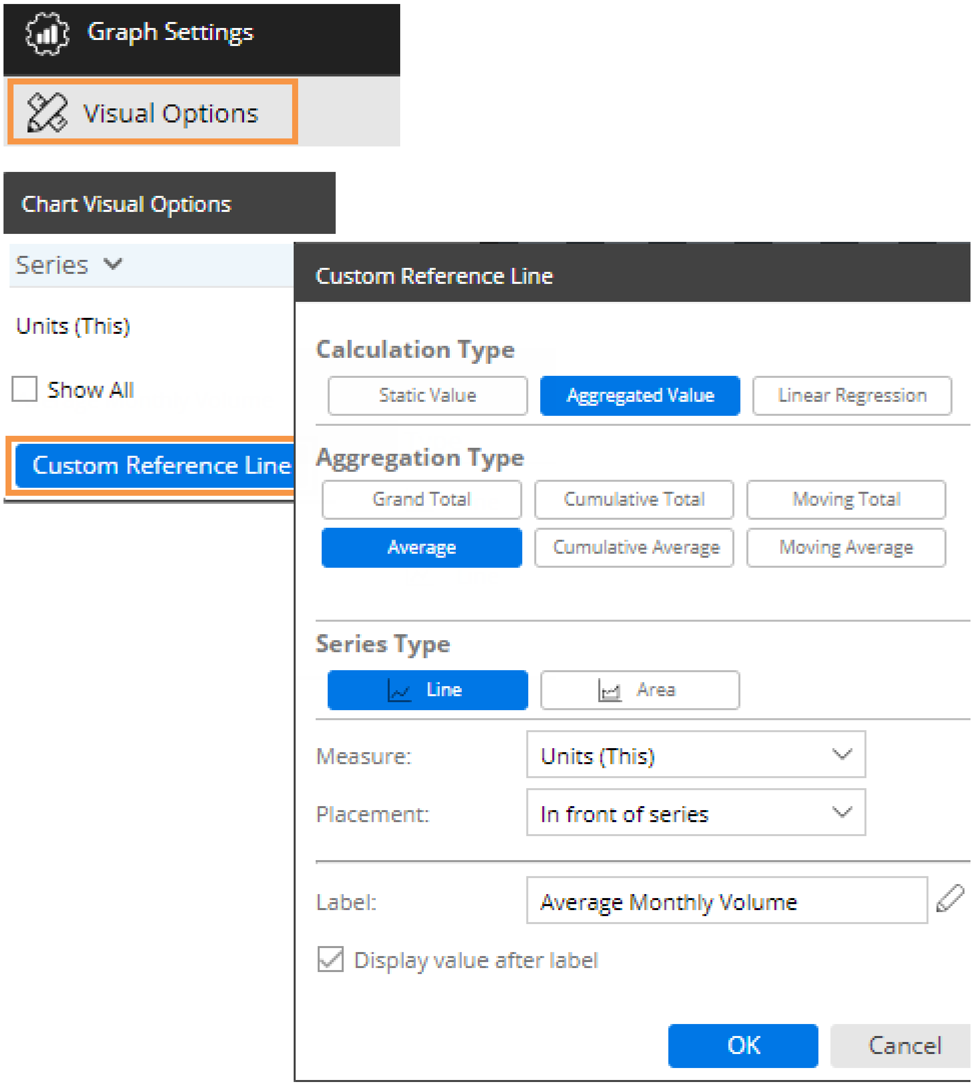


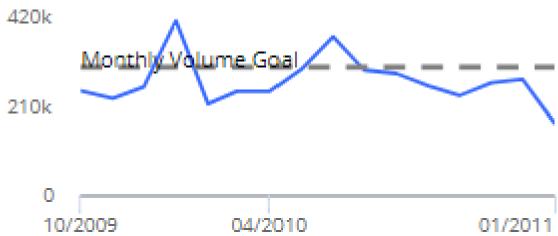
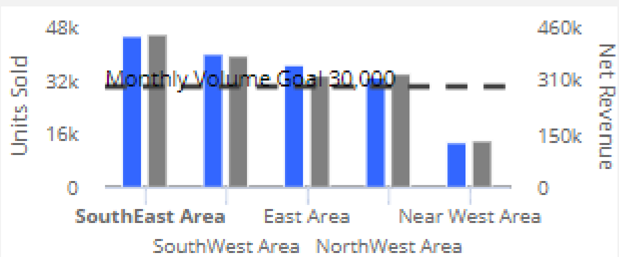
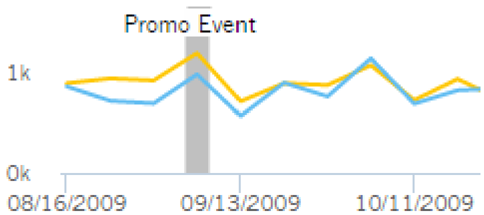
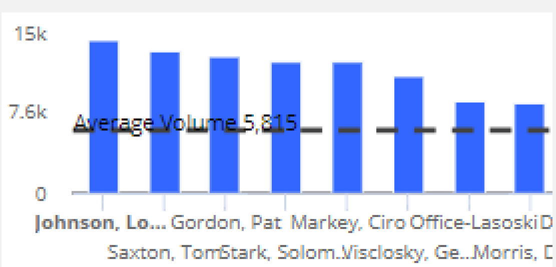
Reference lines

You can add custom lines to enhance data visualizations. Custom lines can show thresholds, important dates, and calculated values such as averages, totals, moving averages/totals, cumulative values, and projections.

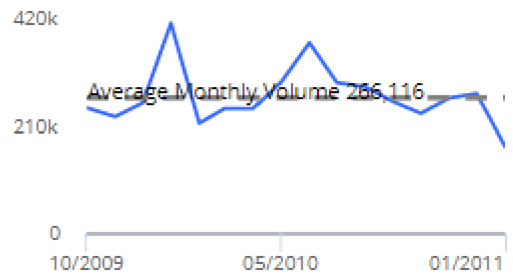
To add reference lines

1. Click on Graph Settings in the toolkit and then click Visual Options.
2. Click the Custom Reference Line button.
3. Select from the available settings, depending on what you want the reference line to show.



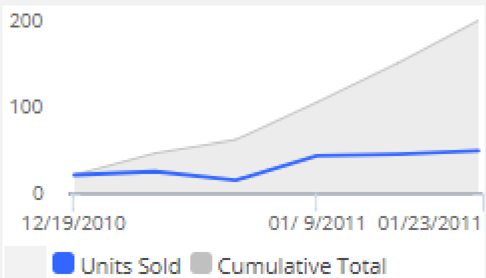
Reference line examples	Recommended settings
Compare values to a fixed, user-defined threshold: Over time in time-series: 	Calculation Type - Static Value Axis -  Y Value or From/To - Enter a static value. For a shaded area, enter the start value and the end value.
Compare values to a fixed, user-defined threshold: Across members in comparative: 	Calculation Type - Static Value Y Value or From/To - Enter a static value. For a shaded area, enter the start value and the end value.
Important dates on a time-series 	Calculation Type - Static Value Axis -  X Value - Click the date control(s) and select a single date (for Line) or the beginning and ending dates (for Area).
Calculated average or total over multiple members (e.g., average volume per sales rep) 	Calculation Type - Aggregated Value Aggregation Type - Grand Total of all members, or Average of all members

<table>
<tr><th>Reference line examples</th><th>Recommended settings</th></tr>
<tr><td>
Calculated average across dates (e.g., average volume per month)



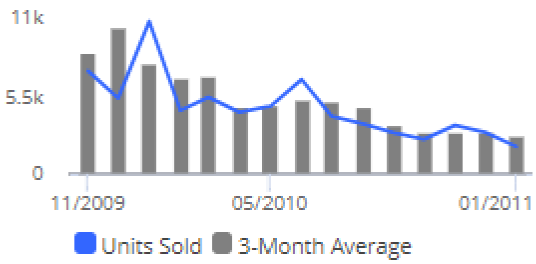
</td><td>
Calculation Type - Aggregated Value

Aggregation Type - Average
</td></tr>
<tr><td>
Cumulative average or total over date range (e.g., cumulative volume over time)



</td><td>
Calculation Type - Aggregated Value

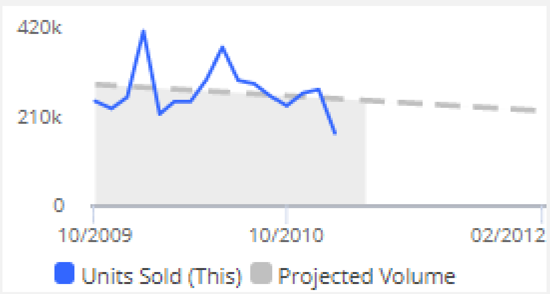
Aggregation Type - Cumulative Average or Cumulative Total
</td></tr>
<tr><td>
Moving averages or totals for a set number of prior dates; smooths data fluctuations



</td><td>
Calculation Type - Aggregated Value

Aggregation Type - Moving Average or Moving Total

Duration - Select the number of prior dates to include in the calculation.
</td></tr>
<tr><td>
Calculated trends with future projections



</td><td>
Calculation Type - Linear Regression

Projection Duration - Select the number of future dates for which to project data based on a linear regression.
</td></tr>
</table>

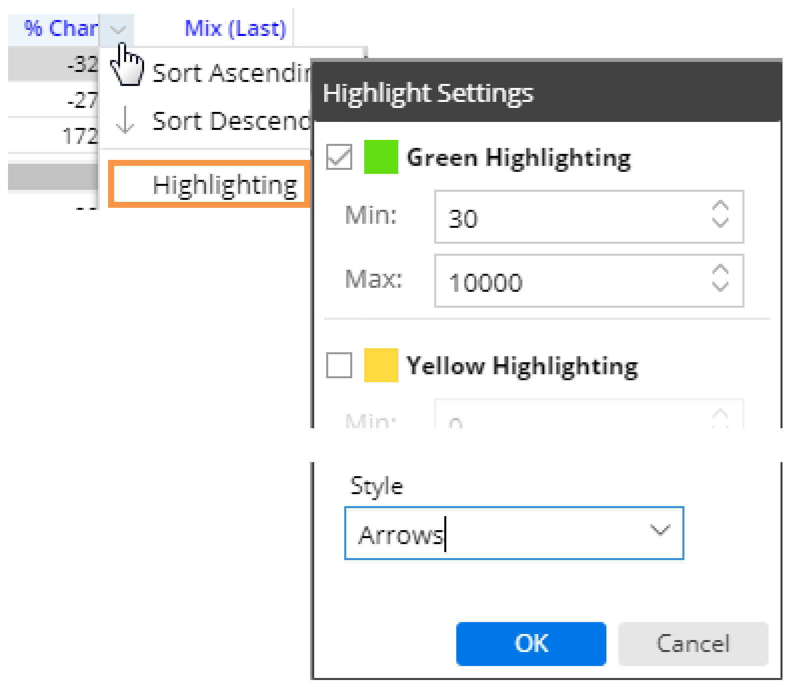
Highlight data

You can use highlighting to spot data that falls within or outside of the expected ranges. You can set unique range criteria for each column (for example, percent change or values) for any or all measures shown.

Grid highlighting

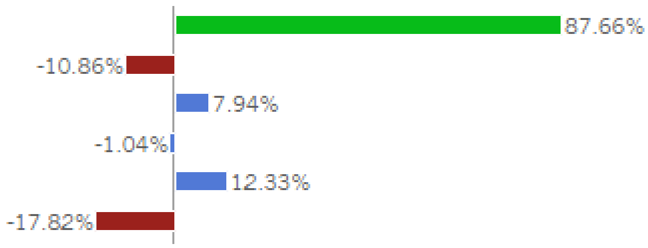
To highlight data in grids

1. Place your cursor on the heading of the column to highlight. You can highlight actual values (This or Last), percent change, difference, etc., for any measure.
2. Click the drop-down arrow that appears.
3. Select **Highlighting**.
4. In Highlight Settings, check **Enable green highlighting**, **Enable yellow highlighting**, and/or **Enable red highlighting**, depending on the highlighting color(s) you want to use.
5. For each color range, type a minimum value and maximum value. If you use multiple ranges, they cannot overlap.
6. From the **Style** drop-down, select a highlighting style.
7. Click **OK**.



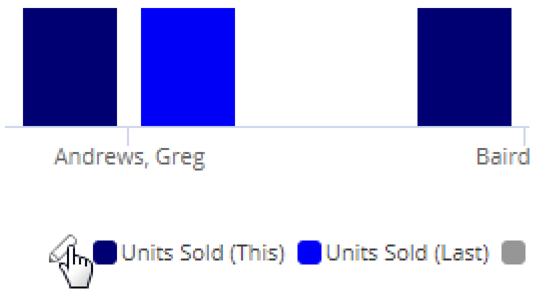
Tip: To access highlight settings for Gauge widgets, click in the upper-right corner of the widget and select Highlight Settings.

Graph highlighting

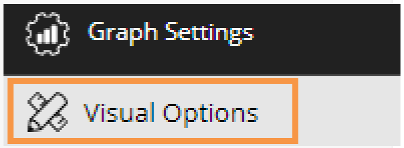


To highlight data in graphs

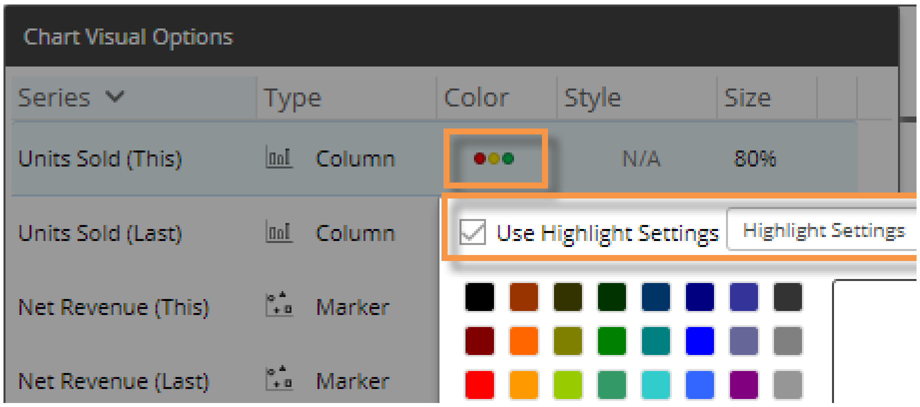
1. Access visual options by placing the mouse over the graph legend and then clicking the ✎ button that appears.



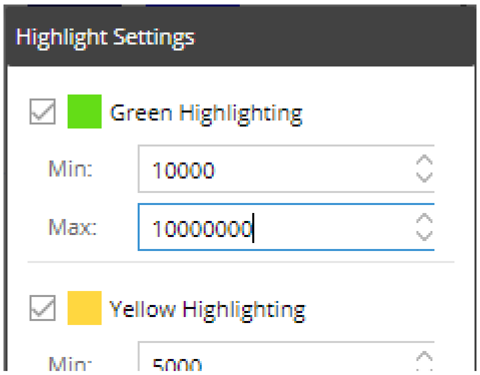
Tip: You can also access visual options under Graph Settings in the toolkit in edit mode.



2. For the measure/format to highlight, click in the Color column.
3. Check the **Use Highlight Settings** box.



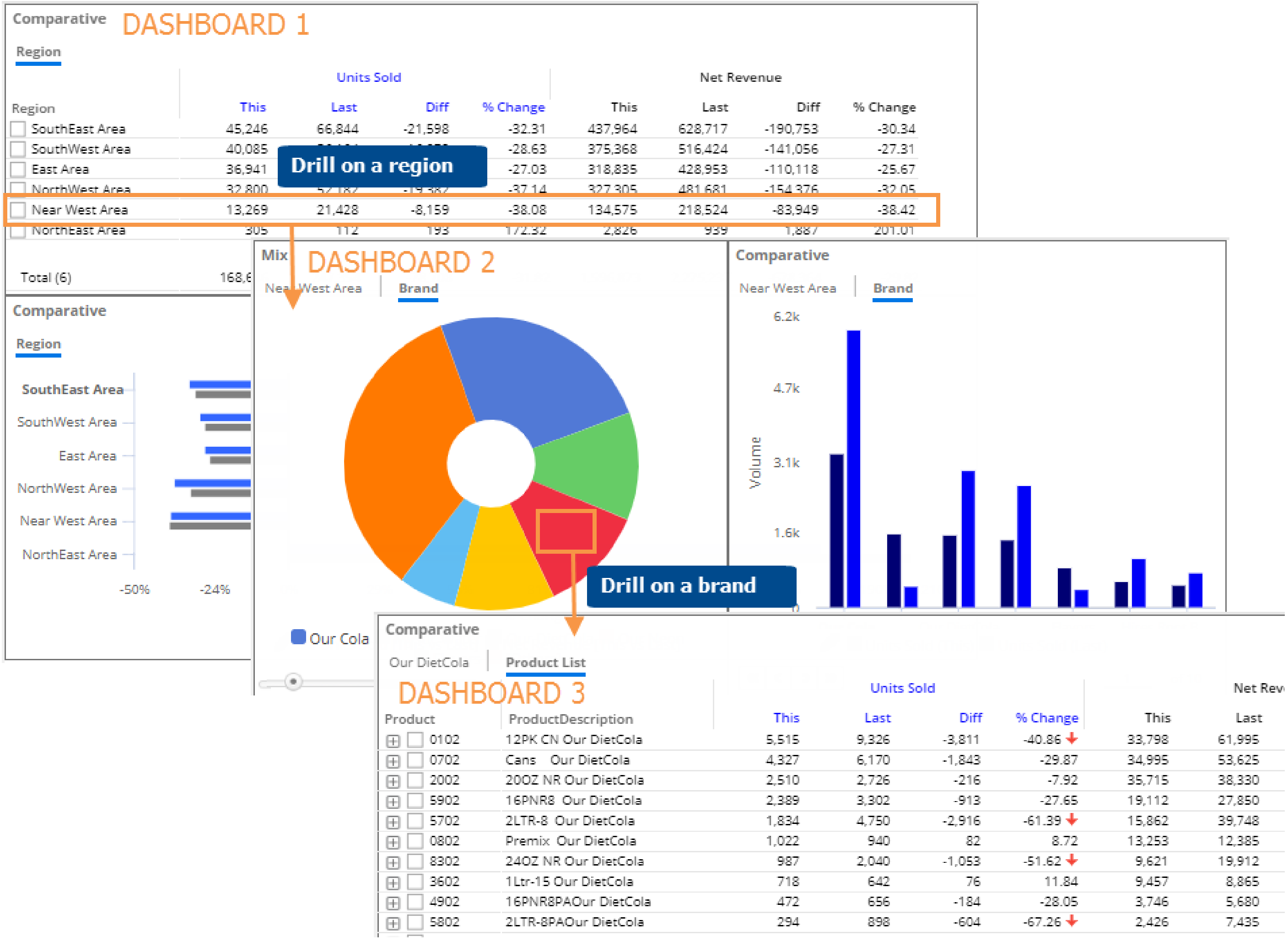
4. If highlight settings are not already configured, click the **Highlight Settings** button to enable them and set highlighting ranges.
5. When you are finished, click OK.



Custom drill-down

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

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



Create a custom drill-down

To create a custom drill-down

1. Create, configure, and publish a dashboard to use for each "step" in the drill-down. Within each dashboard, make sure you select and save the appropriate widget type(s), By dimension, date range, display settings, etc. Consider the following when building the dashboard steps.

   By - Before going to the next dashboard, the user will need to drill through all of the selected By levels within the widget; therefore, if you want users to go directly to the next dashboard the first time they drill, you should only select one By (i.e. only the 1st By) under the Group By area.

   Filters - When the user drills, the selected member will automatically become a downlevel filter in the next dashboard. You do not need to add the filter prior to saving.

2. Open the first dashboard or "step" and set up the navigation link(s)

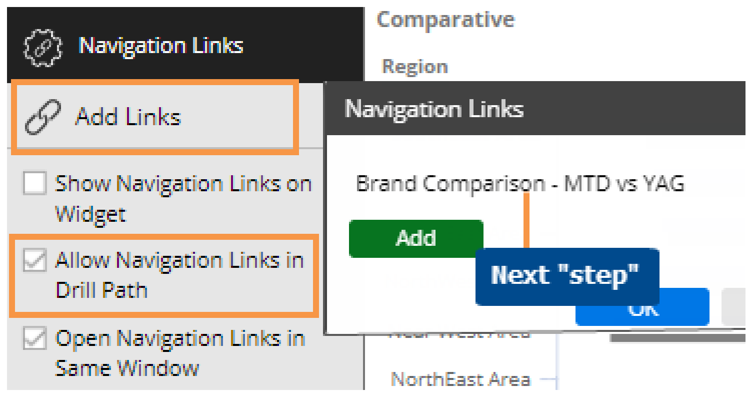
   i. Click on a widget for which you want to set up custom drill-down. The widget must compare members.

   ii. Click on Navigation Links in the toolkit and then click Add Links.

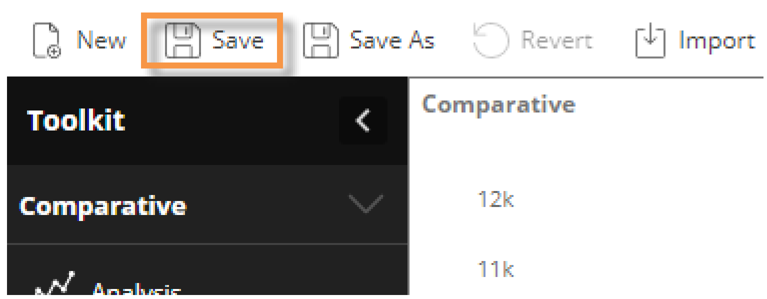
   iii. Click Add and then select the dashboard to use as the next step. You can add multiple dashboards if you want the user to be able to select which one to go to when they drill.

   iv. Under Navigation Links, check the Allow Navigation Links in Drill Path box.

   v. Repeat for all widgets from which custom drill-down should be allowed.



3. Save changes to the dashboard.
4. Repeat Steps 2 and 3 for each dashboard used as a step in the drill-down (except the last step)—specifying the next step and saving each one.
5. Share the dashboard of the first step with users.

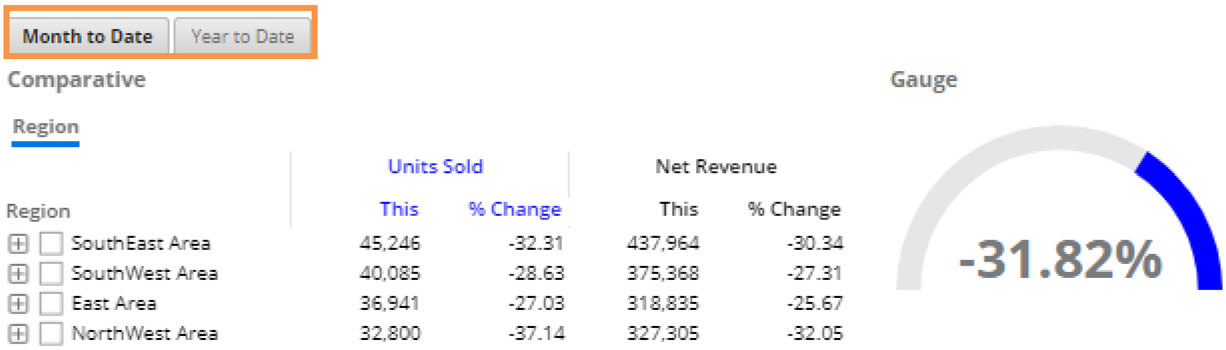


Tip: The custom drill-down can either open the next step in the same window or a new window depending on the **Open Navigation Links in Same Window** setting (located under Navigation Links).

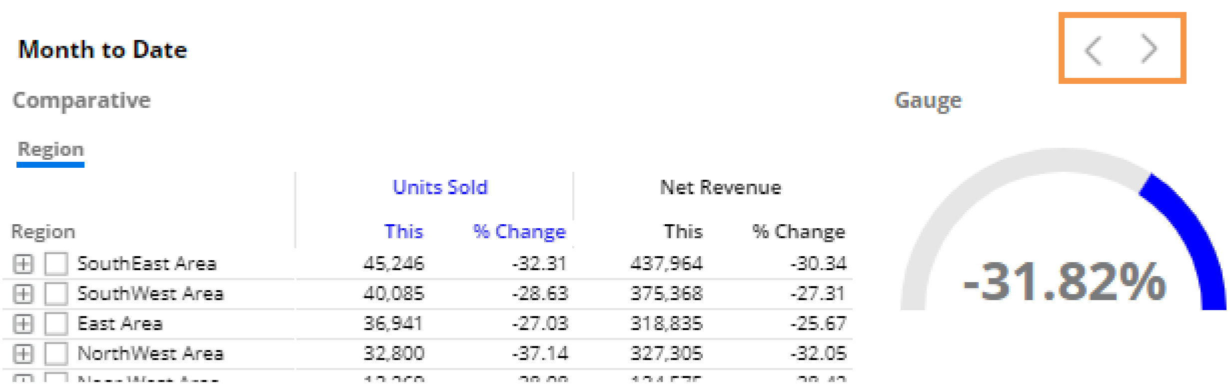
Tab group

The tab group widget provides a tabbed or carousel view of multiple groups of widgets within a dashboard, therefore, maximizing screen space. The user can switch between the widgets by clicking on tabs or arrows. Within each tab, you can add one or more widgets. You can add the desired number of tabs and customize the names of the tabs.

Tab format

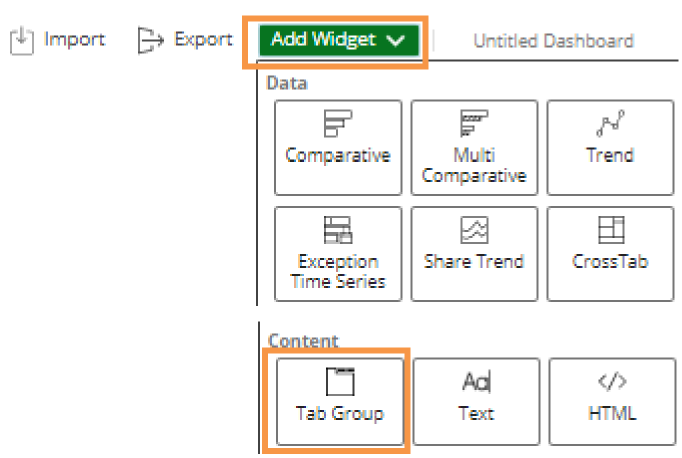


Carousel format



To add a tab group

1. Click the **Add Widget** button at the top of the screen.
2. In the pop-up window, click and drag Tab Group onto the workspace.
3. Optionally change the size of the tab group by clicking and dragging its borders.

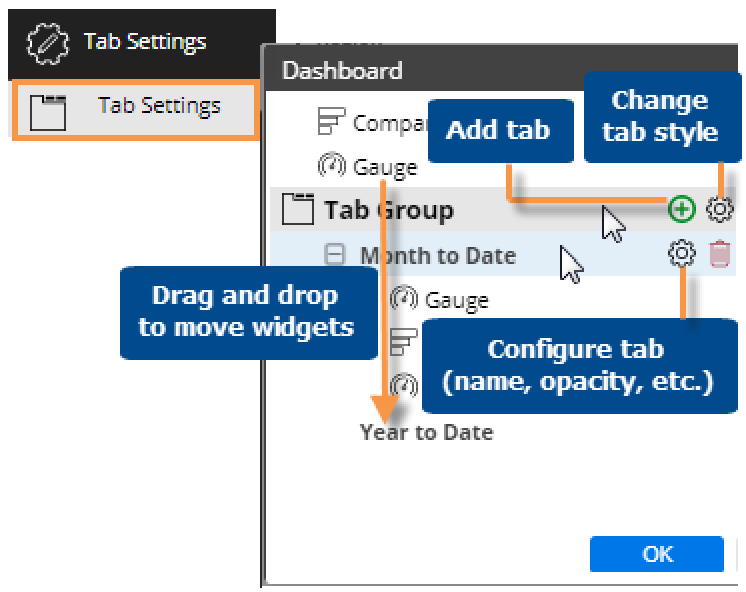


To add a tab group

4. The tab group has two tabs when you first add it. To add additional tabs, click the ☰ button in the upper-right corner (visible on mouseover) and select **Add Tab**.

5. Set up each tab by adding widgets and configuring them. To add a widget to a tab, select the tab and then drag a widget into it or go to **Tab Settings** (see the next step).

6. Configure the tab group by clicking **Tab Settings** in the toolkit (the tab group must be selected) and making selections in the pop-up window.

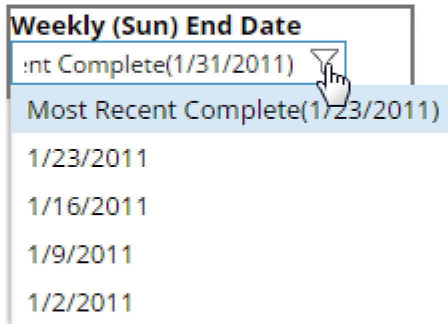


Date selector widgets

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

To use a date selector

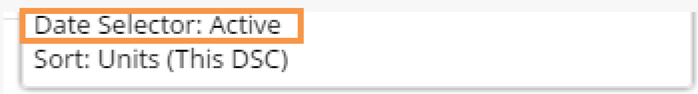
1. Click the drop-down menu.
2. Select a date from the menu to adjust what is considered to be the "current" date. This generally controls the end date of widgets.



Tip:

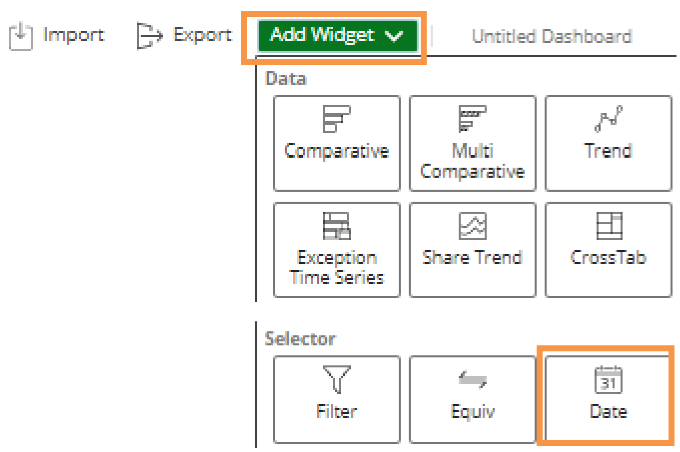
A date selector does not affect fixed date widgets. A date selector affects all "linked" widgets unless they have a fixed timeframe.

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



To add a date selector

1. Click the Add Widget button at the top of the screen.
2. In the pop-up window, click the Date button or drag it onto the workspace.



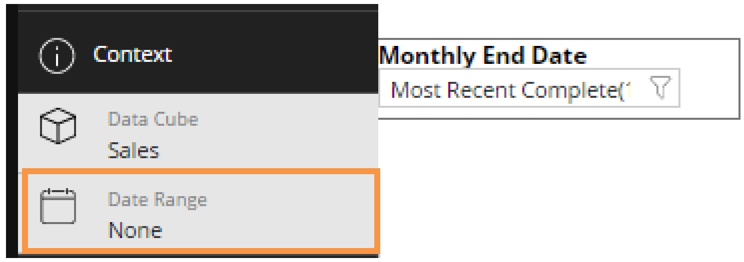
To add a date selector

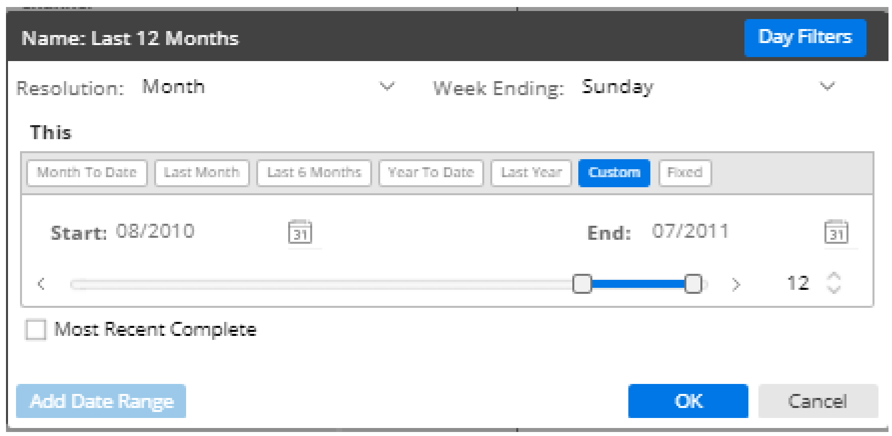
3. Set the dates (see page 22) that will appear as choices in the date selector menu.

   i. Click on the date selector, and then click on Date Range under context in the toolkit.

   ii. Select the resolution of the dates to appear in the menu (e.g., months).

   iii. Configure the date range so that it includes all of dates that should appear as choices in the menu. The dates can be fixed or move automatically to the most recent (or most recent complete) date available. For example, you might want to allow users to select from the last twelve months.





Tips:

By default, a date selector affects all widgets in the dashboard that move relative to "today," "last day of cube," or "last day of data" (i.e., does not affect fixed date widgets). You can disable the date selector for any widget in general settings.

You can only add one date selector to a dashboard.

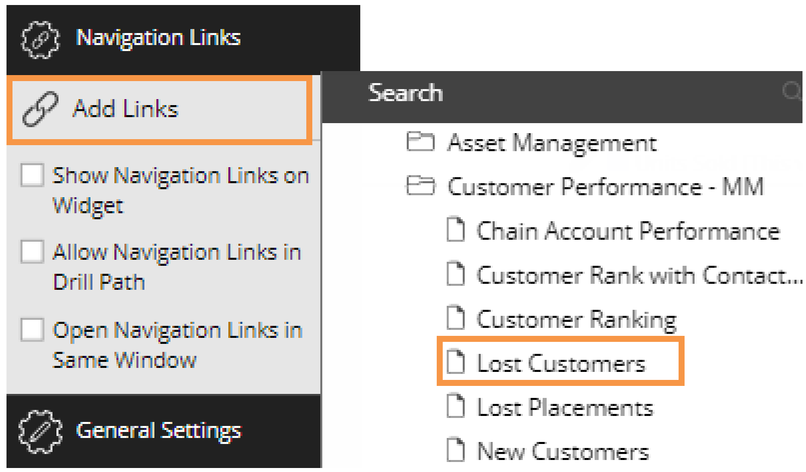
The selected data cube controls the available dates. If the desired dates are not available, you may need to change the data cube associated with the date selector.

Navigation links

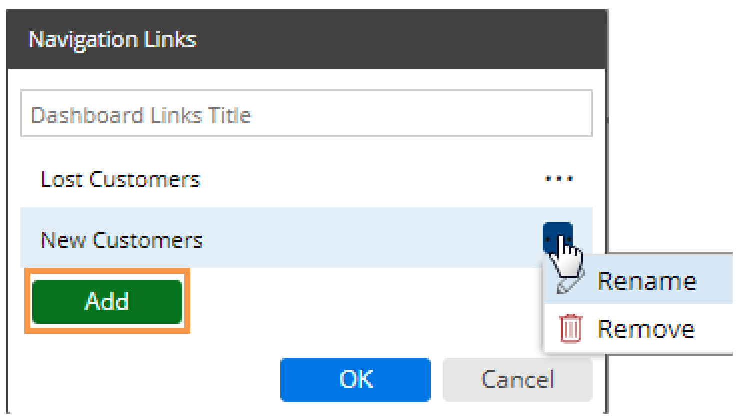
You can embed links to published dashboards within a widget to allow users to easily access related dashboards. The links are listed at the bottom of the widget and/or are available via custom drill-downs (see page 70).

To add dashboard links to a widget

1. Click on a widget.
2. Click on Navigation Links in the toolkit
3. Click Add Links.
4. Select the dashboard to which you want to link. Only published dashboards are available for dashboard links.



5. To link to multiple dashboards, click Add and select additional dashboards. If you wish, you can enter a custom name for the group of dashboard links (defaults to "Dashboard Links" if not specified).
6. If you want to change the display name of any dashboard link, click the ... button and select **Rename**. This assigns a temporary display name but does not change the actual dashboard name.
7. Click OK.



8. Under Navigation Links in the toolkit, select from the following options:

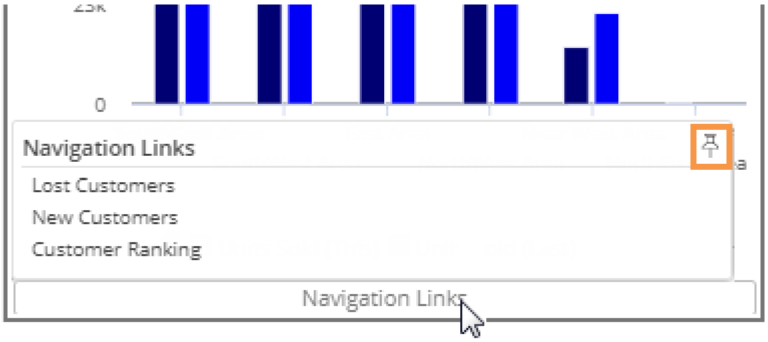
   Show Navigation Links on Widget - Check this box to show the links at the bottom of the widget (pinned or unpinned; see below).

   Allow Navigation Links in Drill Path - Check this box if you want to make the links available via a custom drill-down (see page 71). Otherwise, leave this box cleared.

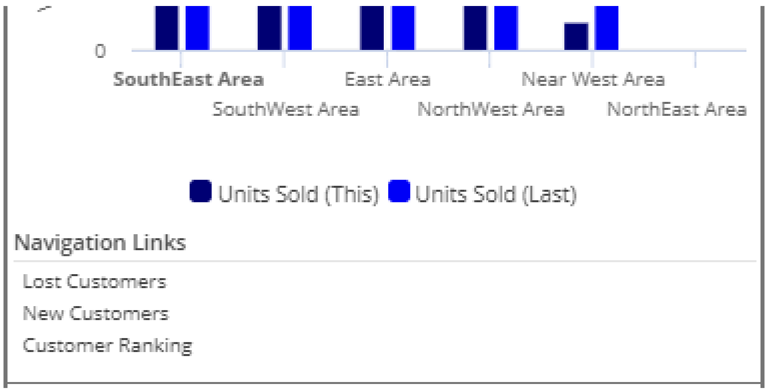
   Open Navigation Links in Same Window - Check this box to open the linked dashboards in the same window as the original dashboard.

Navigation links on the widget are unpinned by default (i.e., mouseover to see links). If you prefer, you can pin the links to the bottom of the widget so they are always visible.

Unpinned:

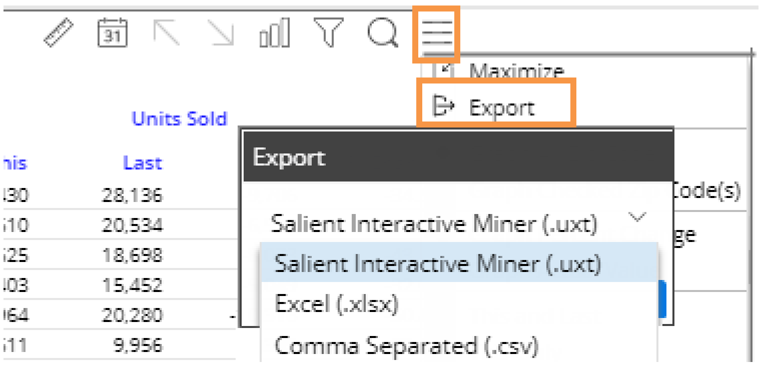


Pinned:



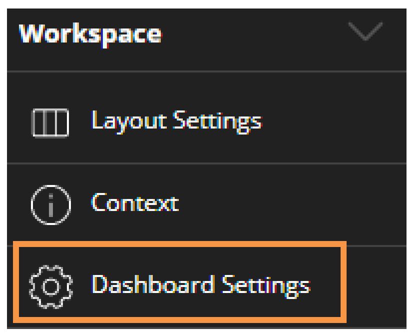
Limiting export options for users

If allowed, users can export in view and edit mode by clicking the ☰ button and selecting Export. The default export options include an Excel, comma-separated, or UXT-compatible file. If you wish, you can turn this capability off or limit the allowed formats.

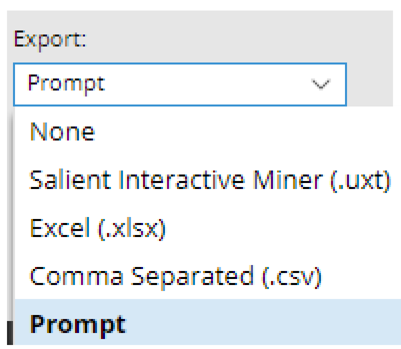


To turn off or limit export options for all widgets in dashboard

1. Click the workspace to select it.
2. In the toolkit, select Dashboard Settings.

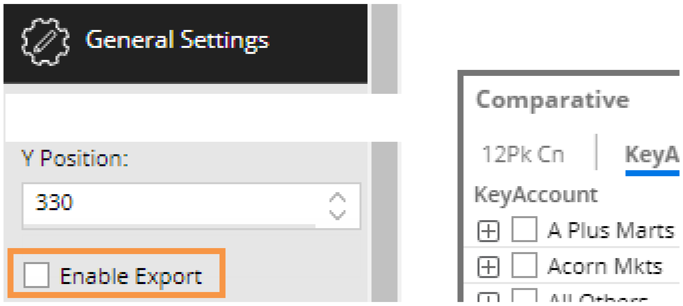


3. From the Export menu, select a single format, None to turn off exporting, or Prompt to allow all formats.



To turn off exporting for a single widget

1. Click the widget to select it.
2. In the toolkit, select General Settings.
3. Clear the Enable Export box.



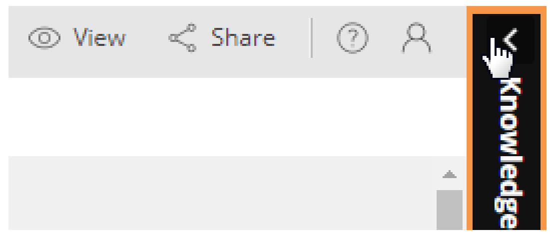
Knowledge Manager

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

To show the Knowledge Manager panel

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

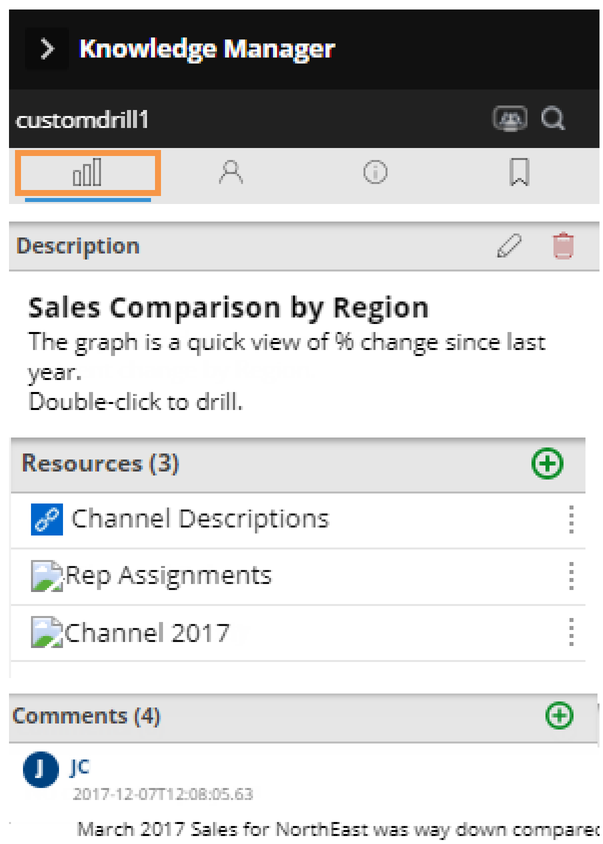
Knowledge Manager includes the following tabs:



Dashboard Info

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

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



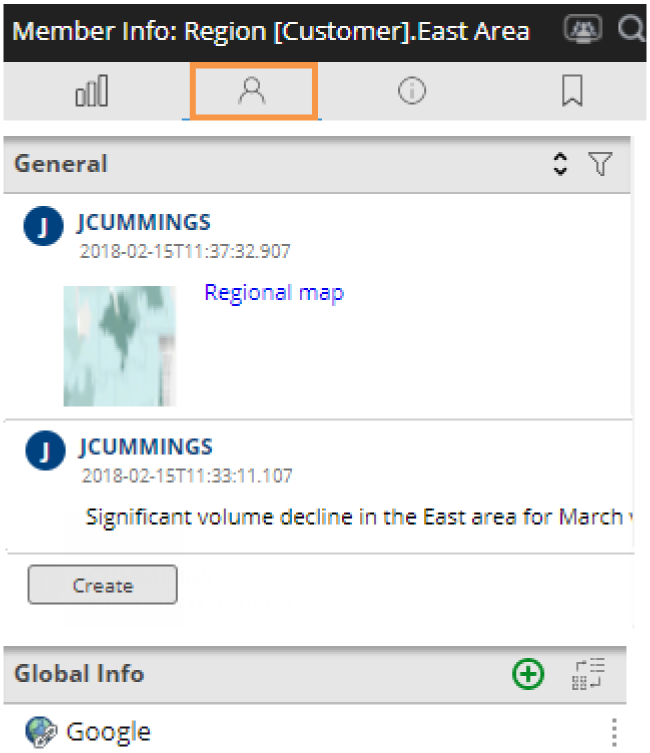
Member Info

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

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

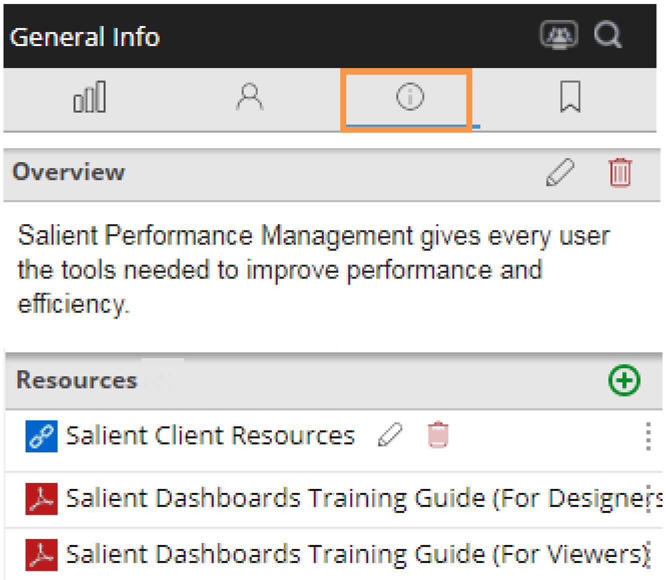
Media examples include news stories, events or related websites.

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



General Info

Adds global information such as manuals, training material, or information about the dataset.



Index/Search

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