SALIENT® MANAGEMENT COMPANY

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Salient Interactive Miner™ Training Guide

Version 7.0

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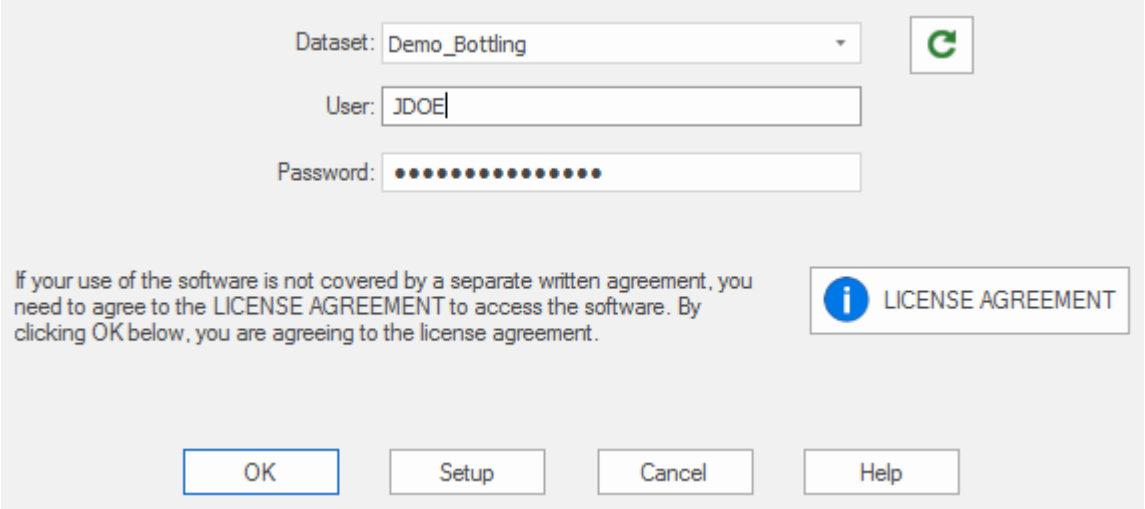
Getting Started

To start up and open a dataset

1. On the **Start** menu, select **Programs**, and then select **Salient UXT, Salient Interactive Miner**. The Open Dataset Server dialog should appear unless single sign-on (SSO) is configured. In SSO configuration, the SIM screen will display immediately without requiring you to enter a user name and password. In this case, you can skip the following steps.
2. In the Open Dataset Server dialog, set up the server location by clicking Setup and entering the IP address of the server if you haven't already. SIM stores this information for future sessions.
3. Select a dataset from the **Dataset** drop-down menu if it is not already selected.
4. In the **User** data window, type your user ID.
5. In the **Password** data window, type your password. Passwords are typically case-sensitive, depending on your organization's security settings.
6. Click **OK**.



Tips

Contact your system administrator if you don't know your user ID or password. Once you log in, you can change your password.

If you do not see the dataset you want to use, click to perform a search. This button searches for all of the datasets that are selected in the list of dataset servers. The search may take a few seconds.

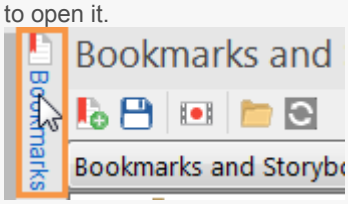
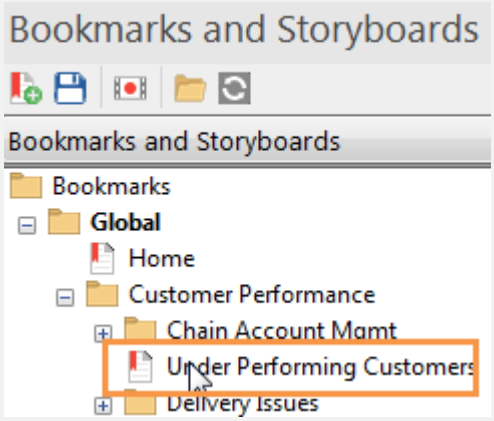
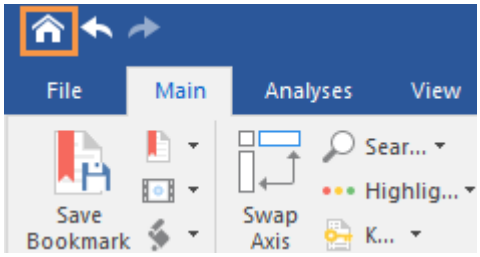
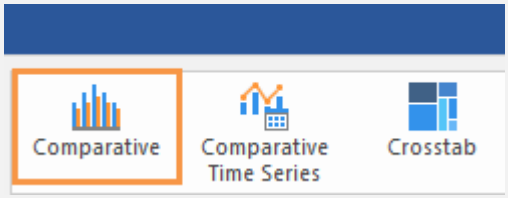
If you still do not see the dataset, it might not be running, or you may need to add it or select it in the list of dataset servers. Click **Setup** to manage the list of dataset servers.

If two or more datasets have the same name, SIM lists the IP addresses of their servers next to the dataset names.

When you exit, SIM saves user data and closes. This does not stop the UXT Server.

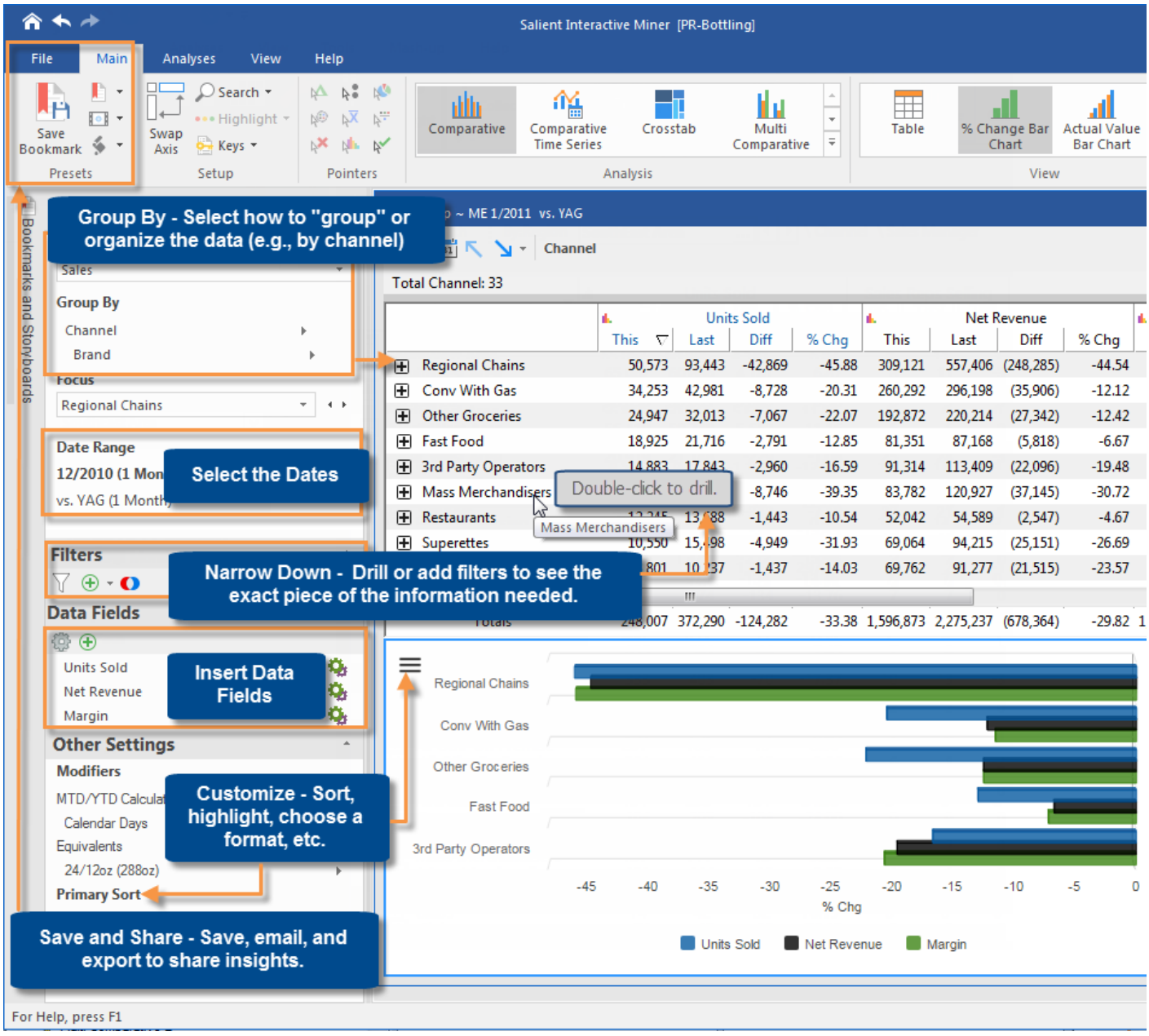
Select a starting point

SIM offers several options for choosing a starting point that allows you to survey and drill deeper.

Option	Explanation	
Use the startup bookmark	Upon opening (see page 4), SIM shows data on the screen. This may be the startup bookmark if one is configured in preferences, or a default layout of data. You can use this startup view if you wish, or choose a different view (see below).	
Open a bookmark	In the Bookmarks panel, click the name of a bookmark to open tip. **Tip:** If the bookmark panel is on autohide, place your cursor over its tab to open it. 	
Go to the home view	Click  at the top of the SIM window to go to the home view. **Tip:** You can set the home view in preferences.	
Start with a Comparative	The Comparative is a standard numbers table or graph that compares several groupings of data and may also compare two different date ranges. This may be a good starting point for investigation. To open a Comparative, click the Comparative button on the ribbon control.	

Basic steps to find actionable information

The following steps allow you to quickly find meaningful, actionable information to help improve performance. Refer to the appropriate sections in this documentation for more information.

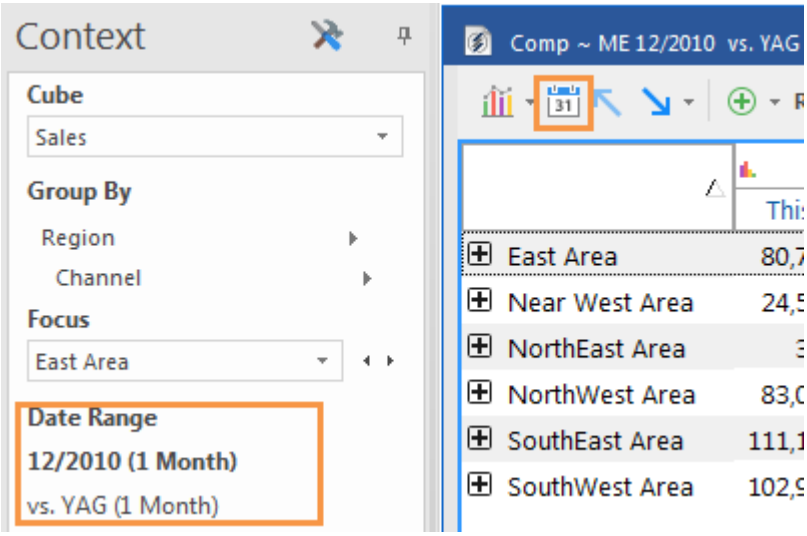


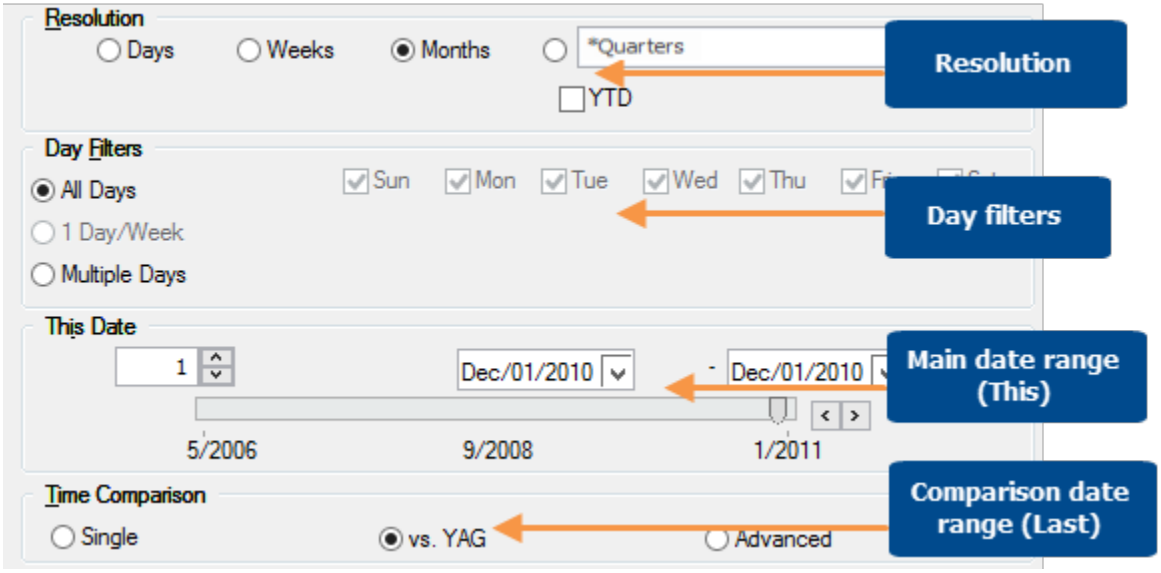
Select the Dates

You can change the dates or "timeframe" shown in any analysis. Many analyses (for example, Comparative Dimension Members) total data over the specified date range. Time-series analyses show data for each individual day, week, month or fiscal period in the date range.

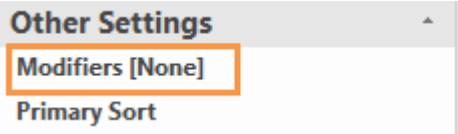
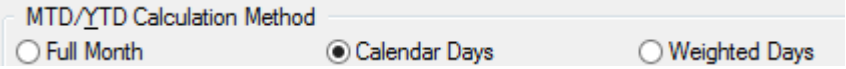
To select the date setup

1. Click the button in the analysis window toolbar, or click the Date Range area of the context panel.
2. In the dialog, choose from the following date settings.





Option	Explanation
Resolution (i.e. days, weeks, months, or customized periods, etc.)	In the **Resolution** box, click the radio button of the units you want to use. Time-series analyses will show data for each unit of time separately. Other types of analyses widgets will total data for the units of time in the selected date range. If you choose **Weeks**, select a week-ending day from the **Week Ending** drop-down menu. This option is not available if your administrator has set a global week-ending day. If you choose **Months** or periods and you are not setting a time-series date range, you can check **YTD** to see data for the first of the year to the selected month or period.
Day filters (optional)	You can choose specific days of the week or business days to analyze. Data for all other dates will be filtered out.
Main date range (This)	In the **This Date** box, select from the following to set the desired date range: • Enter the number of days, weeks, months, or periods in the date range. • Select the ending date of the date range by clicking and dragging the pointer, or click the drop-down arrow beside the end date shown to select the ending date from a calendar. • Optionally, you can set the starting date of the date range by clicking the drop-down arrow beside the start date shown. This automatically adjusts the number of dates in the range. **Tip:** If you are looking at the year-to-date (YTD), the beginning of the date range automatically adjusts to the first month or period of the year.
Comparison date range (Last)	The available time comparisons depend on the type of the selected analysis. In the **Time Comparison** box, choose one of the following: • **Single** shows data for This date range only. • **vs. YAG** compares data with the same time one year earlier based on a set of rules. • **Advanced** lets you select a different date range for comparison. After you click Advanced, set the Last date range using the options in the **Last Date** box.

Option	Explanation
Comparison for incomplete timeframes	If you are comparing months or periods that are incomplete (or may be incomplete when viewed) to a previous date range, then you should select a **MTD/YTD Calculation Method** under Modifiers to determine how to select the dates in Last date range. In the Other Settings area of the context panel, click **Modifiers**.  In the dialog, choose one of the following options:  • **Full Month** - 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. • **Calendar days** - 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. • **Weighted days** (requires additional licensing and setup) - Compare the incomplete month or period with a percent of the total for the Last month or period, based on a projected percent set by your administrator. Budget data is also adjusted based on the projected percent. For example: March 1-15, versus fifty percent of the total of last March. If choosing this method, select the weighted day table from the drop-down menu.

Tips:

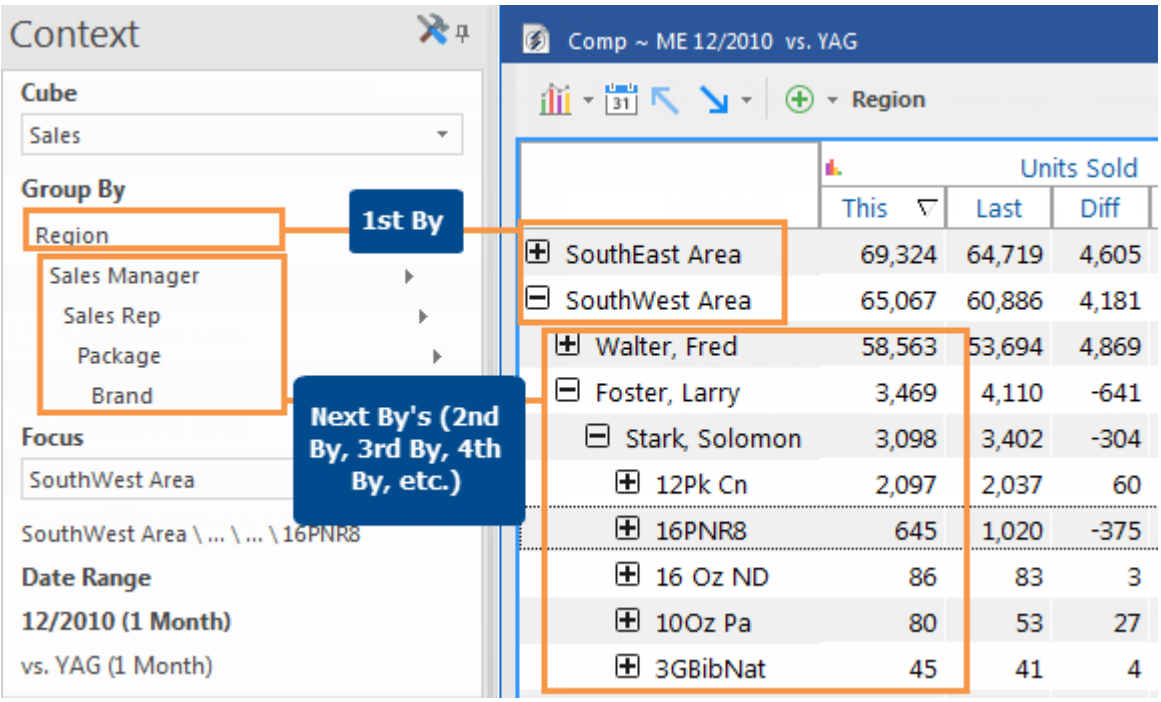
An asterisk (*) appears before the names of incomplete period tables. If you choose an incomplete period table, This date range and Last date range must fall within the defined periods.

Time-series date ranges require at least two units of time.

Group By and Focus

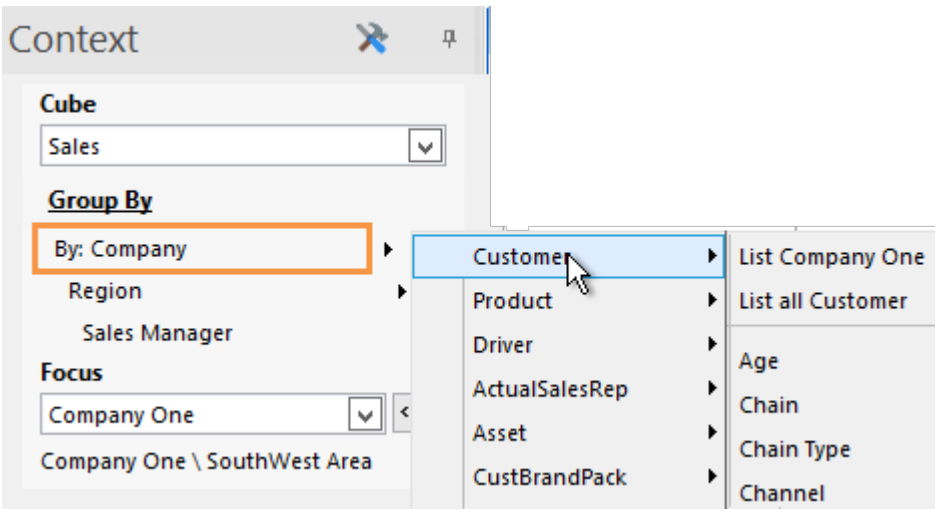
Group By

The By (1st By) controls the groupings shown at the highest level. The 2nd By controls the sub-groupings that you see next when expanding an item or drilling down. Additional levels are available as you continue to expand or drill.



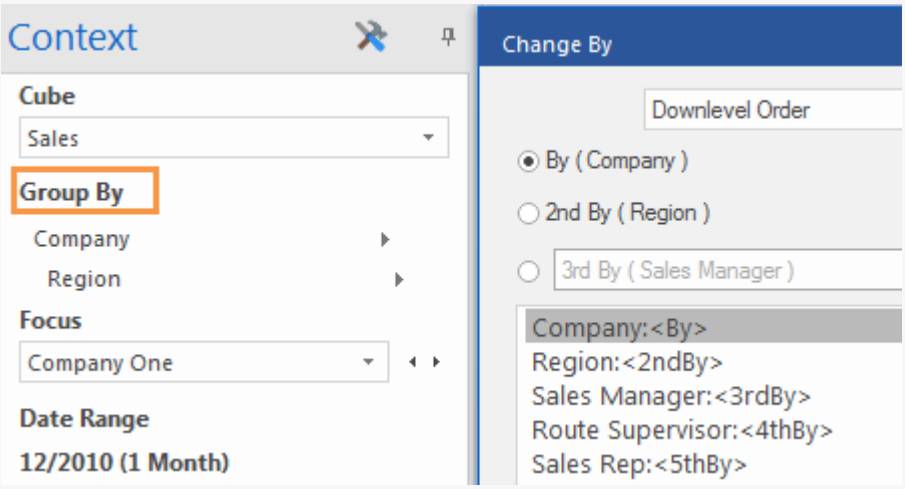
To group By..

1. Click on the analysis window and then click under **Group By** in the context panel. Click on the level you want to change. By default, the context panel shows the 1st By and 2nd By and may show additional levels if you have expanded members.
2. Select the key, and then select the new By.



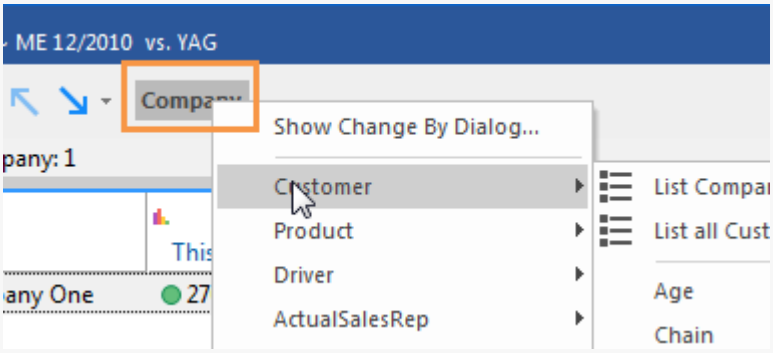
Tips:

To access the Change By dialog where you can change the 1st By, 2nd By, 3rd By, etc., click **Group By** in the context panel.



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

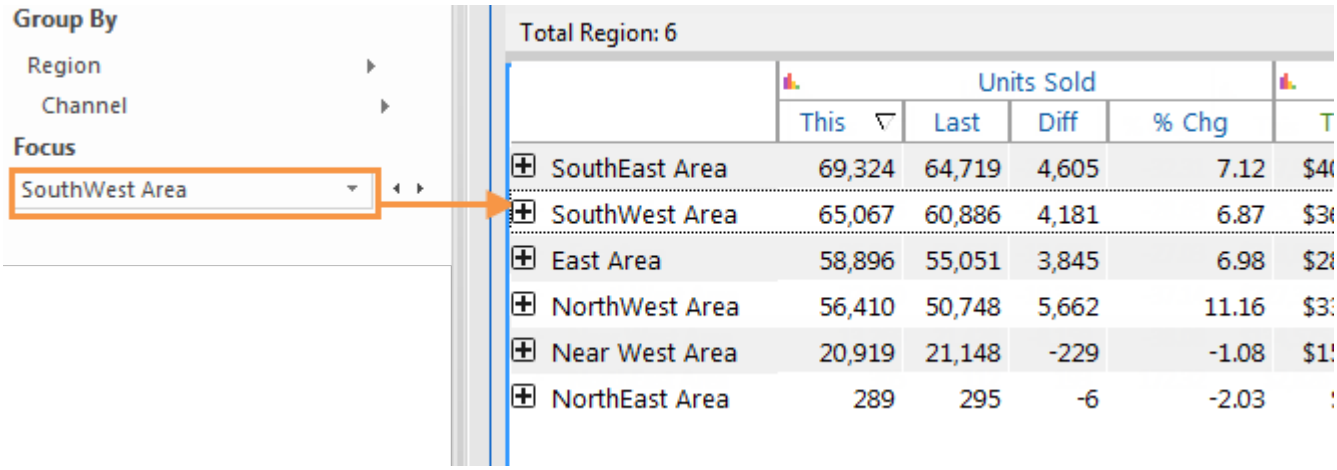
Users can also click the breadcrumb path at the top of the widget to change the By.



Focus

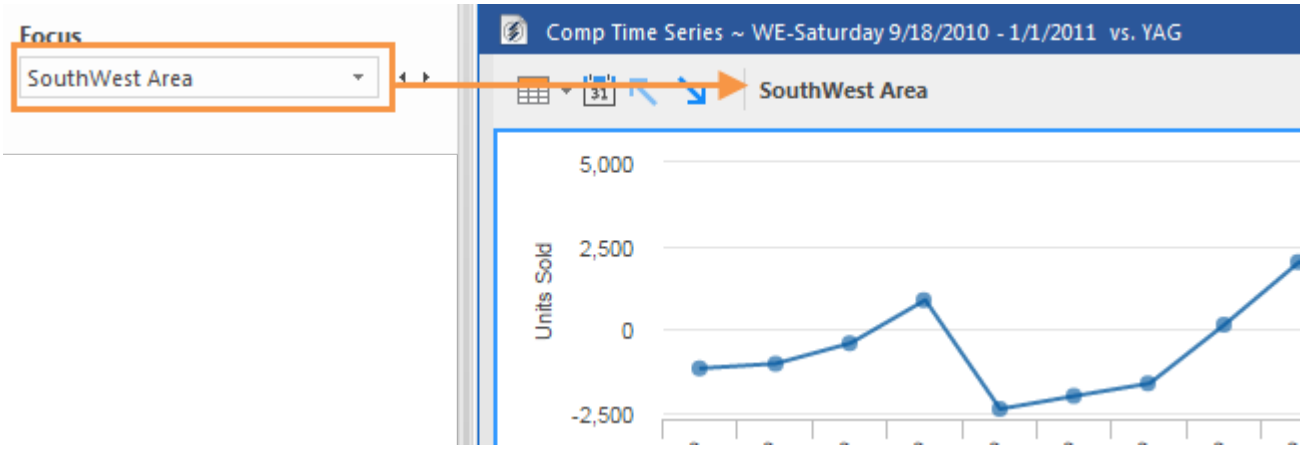
Focus in comparative analyses

On an analysis comparing multiple members at once (for example, Comparative Dimension Members), the row or column of the focus is outlined and you can compare the focus to other members.



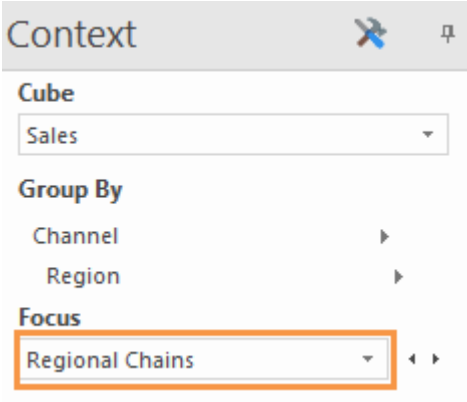
Focus in non-comparative analyses and key lists

Other types of analyses, such as time-series, Scattergram, P&L Format, key lists, etc., only show data for the member in focus; therefore, you should select a focus. You can focus on all or the average of members.

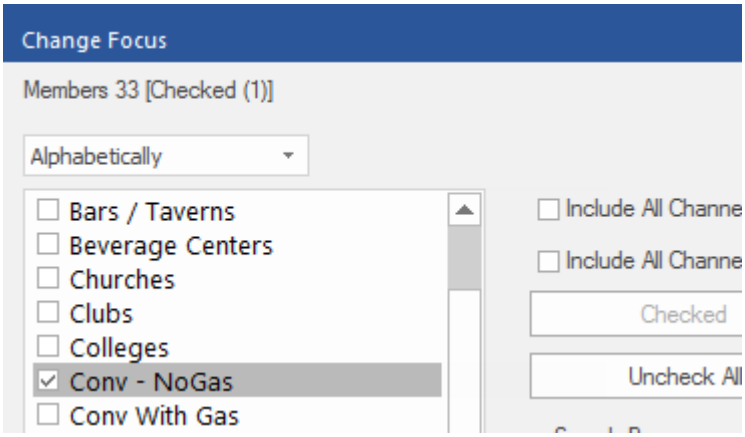


To change the focus

1. Click the focus drop-down in the context panel.



2. Select the new focus from the drop-down menu or dialog. (A drop-down opens if the dimension has just a few members; a dialog opens if the dimension has many members.)

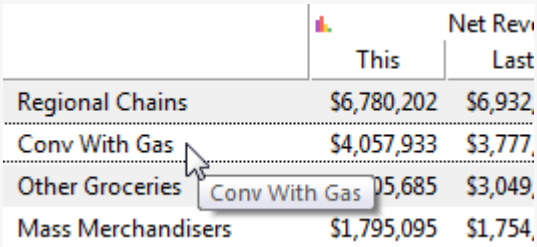


Tips:

If you select more than one member by checking boxes in the Change Focus dialog, SIM will filter out data for all other members. This is also referred to as "checkbox filtering."

In non-comparative analyses (e.g., time-series), you can look at the total or average of all members by selecting the All or Avg option at the top of the dialog.

In comparative views, you can click on the row, column, or item in the analysis window to change the focus.



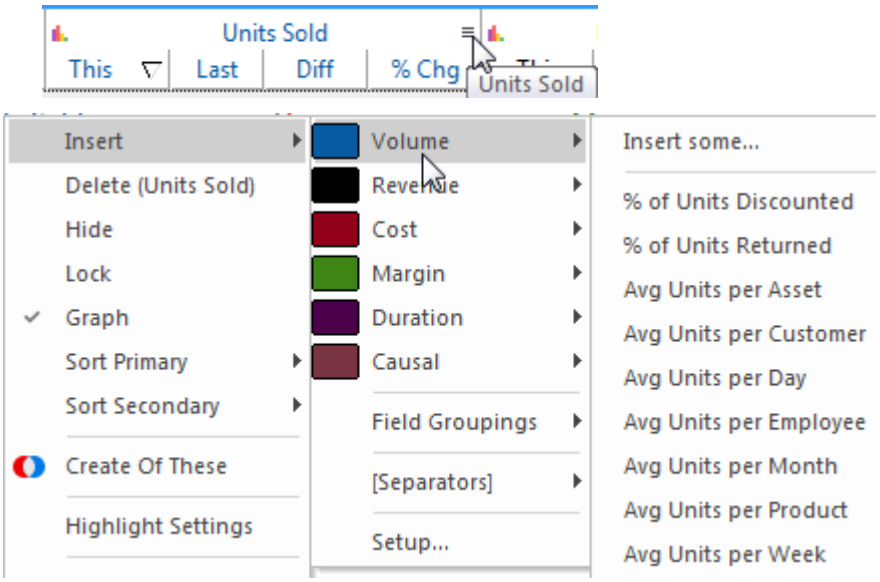
Insert Data Fields

In key lists and most tables, you can insert data fields, which are sometimes referred to as "metrics" or "measures."

To insert a data field

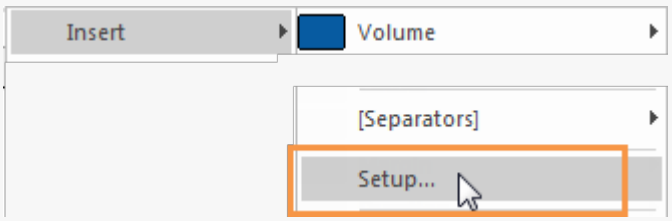
1. Place your cursor over the column heading just before the place where you want to add the data field.
2. Click the tools icon ≡ to open the pop-up menu.
3. On the pop-up menu, select **Insert**.
4. Select the data field grouping (such as Sales) and then the data field if your organization has set up logical groupings.

   Or, select from a submenu of data categories, such as Volume, Costs, etc., and then the data field.

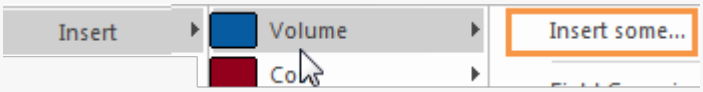


Tips

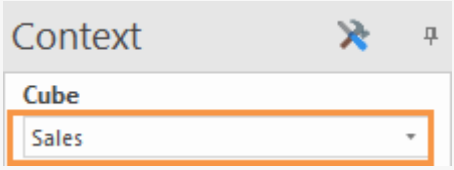
You may prefer to use the Insert Data Types dialog if you want to insert multiple data fields and/or mix, difference, percent change, etc. To access this dialog, select **Setup** on the Insert menu.



To insert multiple data fields from the same category, select **Insert some** from the Insert menu.

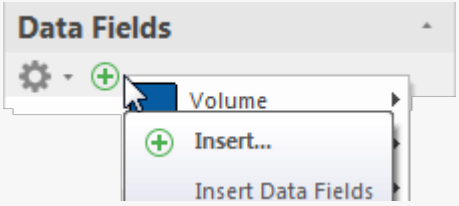


If you don't see the data field you want to insert, you may need to switch to another data cube.

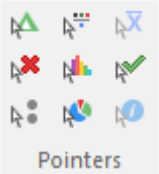


Tips

You can also insert data fields by clicking the button in the Data Fields section of the context panel.

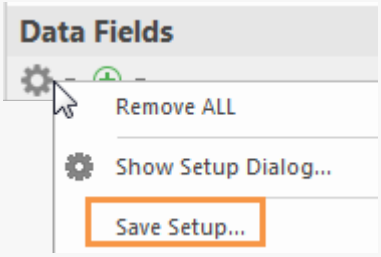


Pointer buttons (see page 16) are available to add Mix, Delta, and other computations.



The Separator options on the Insert menu let you separate sets of data fields for easier viewing. The dash and equal signs are only available when viewed as rows.

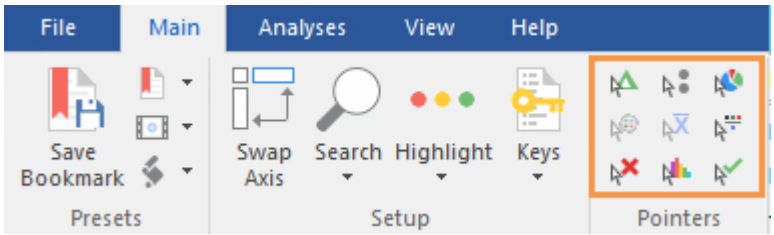
If you want to reuse a layout of data fields, you can save it as a setup.



In key lists (see page 41), you can also insert properties (name, address, etc.), dimensions (channel, sales rep, etc.), and rank.

Show variance, mix, and other computations

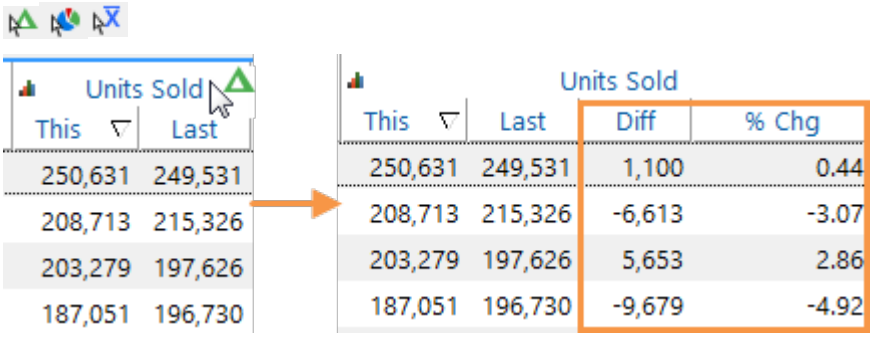
Some of the pointers, located in the Main tab, allow you to add variance, mix, and other computations to a table of numbers.



Button	Explanation
Delta	For any data field, this button inserts the difference (Diff) and percent change (% Chg) between date ranges, or between actual values and budgeted goals. To add the difference/change percent between Last date range and This date range (This-Last), click the main data field heading, or to add the difference/percent change between any other values, click the appropriate subheadings in the order of the formula (e.g., This-Budget). You can also add the difference between average per period columns.
Index	This button lets you index members to a base or standard for one or more data fields. After activating the pointer, click the base member(s) and then the data field.
Mix	This button adds percent of the total (mix) contributed by each dimension member in a Comparative Dimension Members numbers view, each key member in a key list, or each unit of time in a Normal Trend or Comparative Time Series analysis. You cannot add mix for fields calculated with multiplication or division (such as per unit fields).
Average Per Period	This button inserts the average per unit of time (per day, week, month, or period) in tables that total data for two or more units of time. For example, if you are looking at three months of data, this pointer will allow you to see monthly averages for that date range.

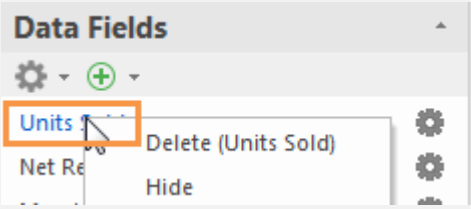
To add variance (delta), mix, or average per period

1. Click on the pointer button.
2. Click on a column heading.
3. When you are done using the pointer, click on a the pointer button again or press **Esc** to turn it off.



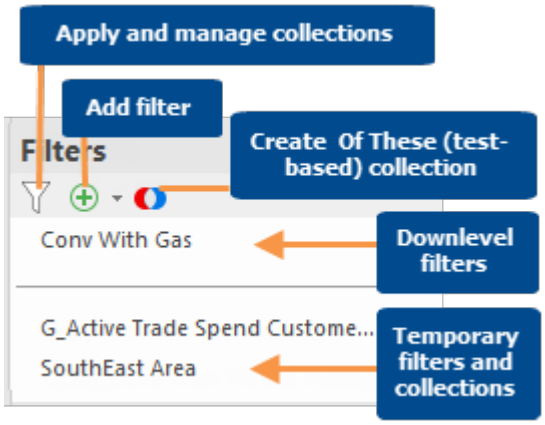
Delete a data field

If you have setup management rights, you can delete a data field.

Option	Explanation
Delete Pointer	Click the Delete Pointer (located in the Pointers section of the main ribbon control). Click the headings of the data fields you want to delete. Click the Delete Pointer again to turn it off.
Data Fields area of context panel	Click the data field name in the Data Fields area of the context panel. In the menu, select **Delete**. 
Double-right-click	Double-right-click the heading of the data field.

Filter

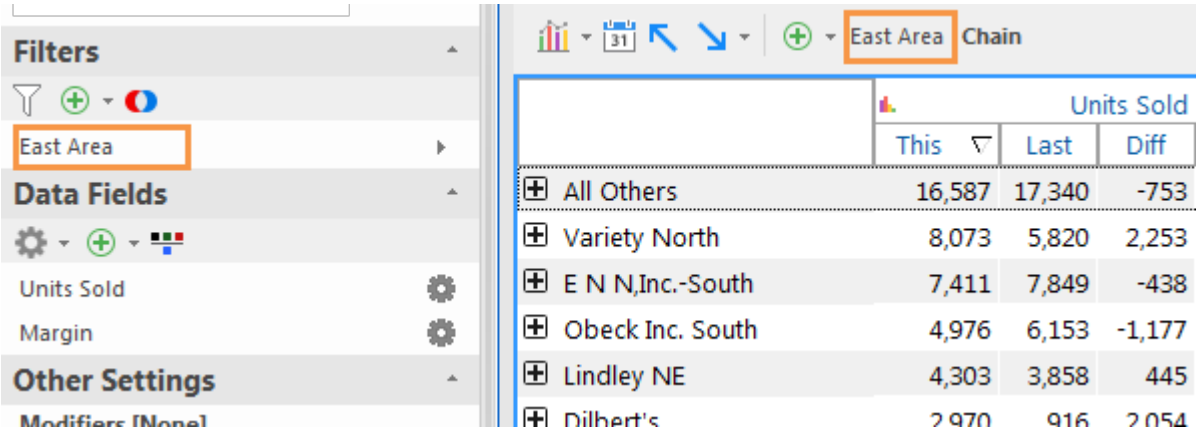
As you ask questions, you'll likely want to narrow down or "filter" on particular subsets of the data. The **Filtering** area of the context panel shows the filters for the selected analysis window and lets you add or remove filters.



Tip: You can click on any filter in the context panel to change it, or double-click to remove it.

Drill

When you drill down, the selected member(s) becomes part of the path, all other data is filtered out, and the data is grouped by the next dimension in the drill order.



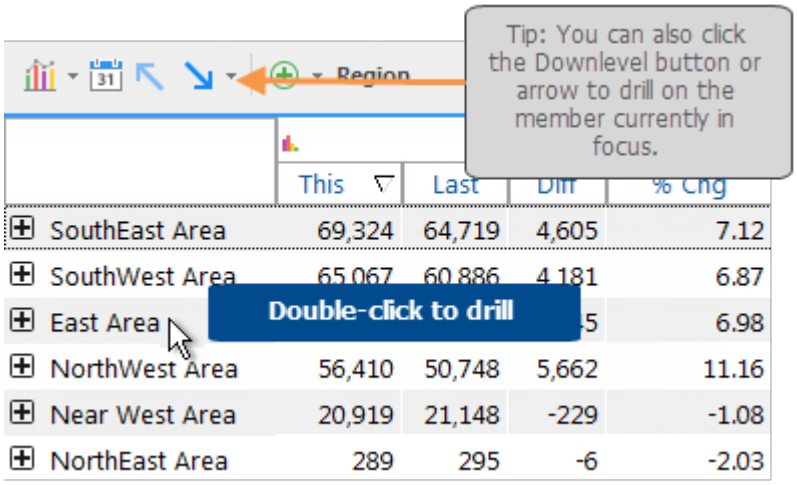
You can use either of the following methods to drill down.

To drill on a single member

1. Group the data (see page 10) by the dimension on which you want to drill.
2. Double-click on the row, bar, pie slice, etc., representing that member.

SIM adds the member to the path and filters out all other data. The data is then grouped by what was previously the 2nd By.

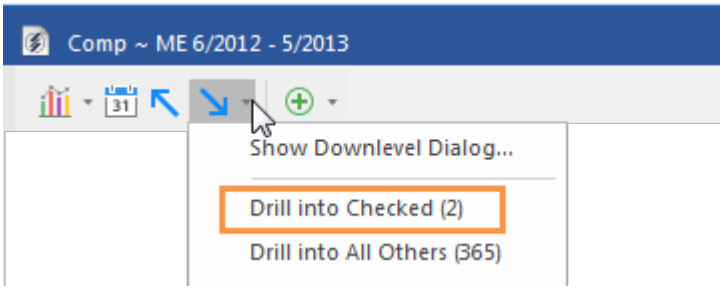
Tip: If you want to select the next By (rather than using the 2nd By), you can click the drop-down arrow beside the Downlevel button:



To drill on multiple members

1. Group the data (see page 10) by the dimension on which you want to drill.
2. Use the check pointer to checkmark the members.
3. Click the drop-down arrow beside the Downlevel button at the top of the analysis window:
4. Select **Drill into Checked**.

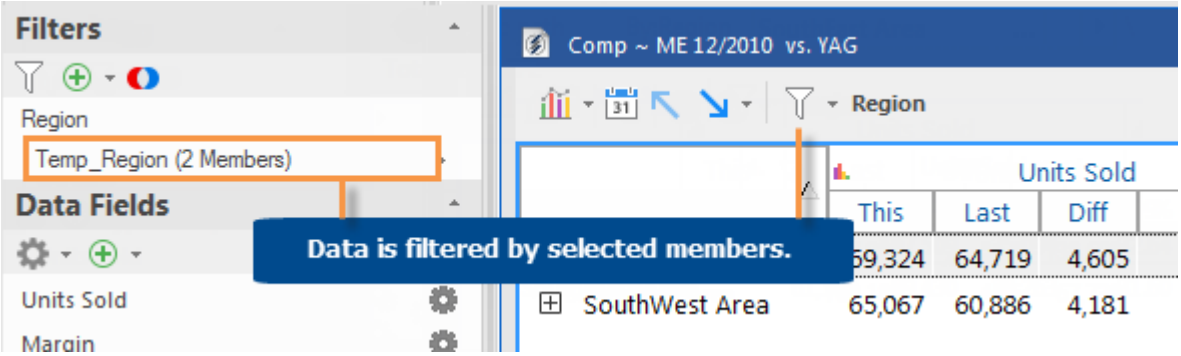
SIM adds a temporary collection to the path and filters out all other data. The data is then grouped by what was previously the 2nd By.



Tip: You can control the downlevel order (i.e., what becomes the next By as you drill) in Preferences.

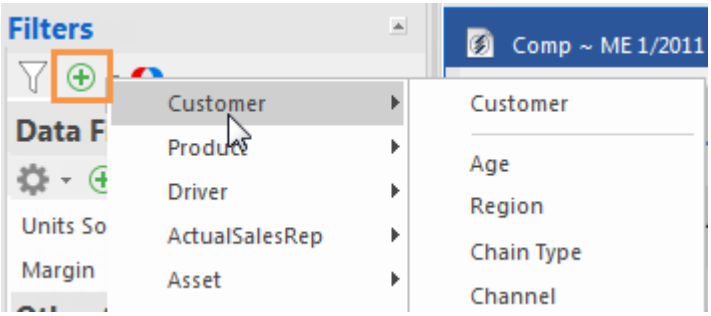
Add a filter

You can add filters to view any subset of the data. Using this method, the selected member(s) do not become part of the drill path; they are simply turned on as a filter. In addition, the By dimension does not change.



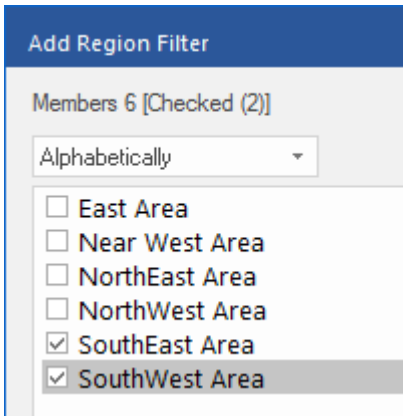
To add a filter

1. Click the analysis window to select it.
2. Under **Filters** in the context panel, the ⊕ button.
3. In the menu, select the key and then the dimension by which you want to filter the data.



4. In the dialog, place a checkmark next to the member(s) you want view.
5. Click **OK**.

Tip: This method of filtering creates and turns on a temporary collection if you select multiple members.

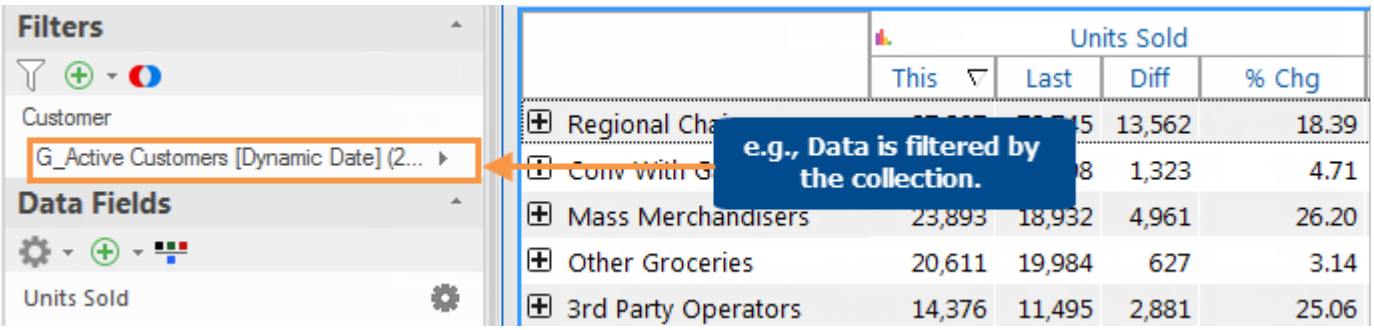


Collections

Turn on a collection

Filter data by a collection

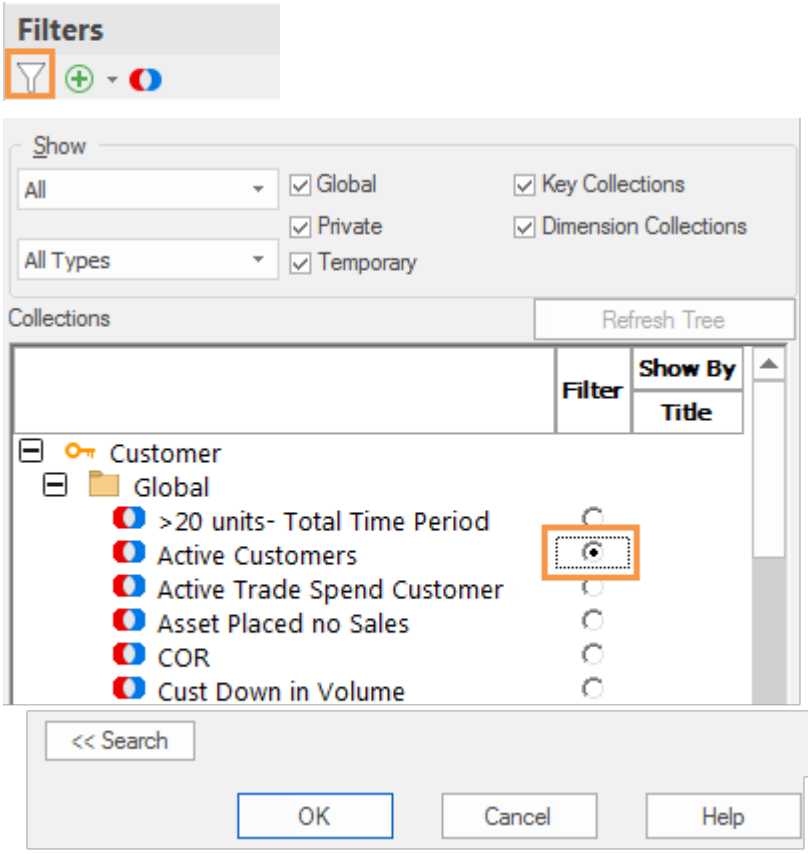
You can apply a collection to filter the data. If you wish, you can filter by multiple collections at a time.



To filter by a collection

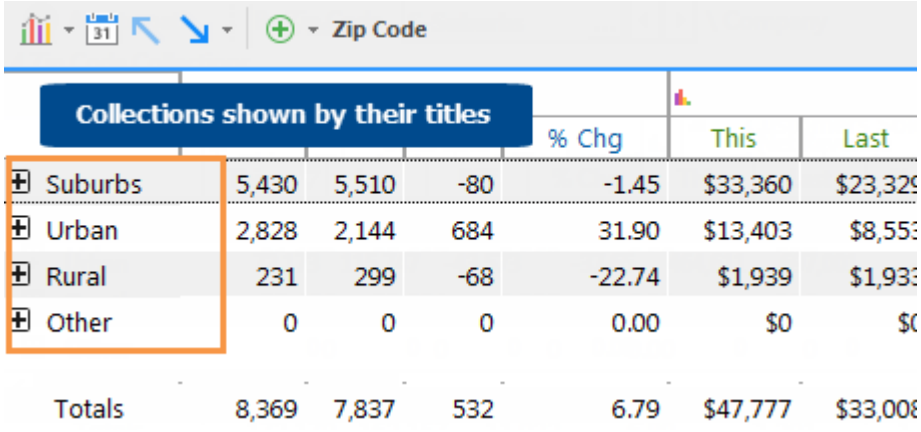
1. In the Filtering area of the context panel, click the button.
2. In the Collections tree, expand the key or dimension and category (global, private, etc.) of the collection you want to turn on.
3. Click the **Filter** radio button beside the collection. Dynamic collections (Of These) have the symbol beside them.
4. Click **OK**.

Tip: Normally, turning on a collection shows data for only the members of the collection. If the **Exclude selected members** option is on for the collection, filtering by the collection shows data for all members except the members of the collection.



Show a collection by its title

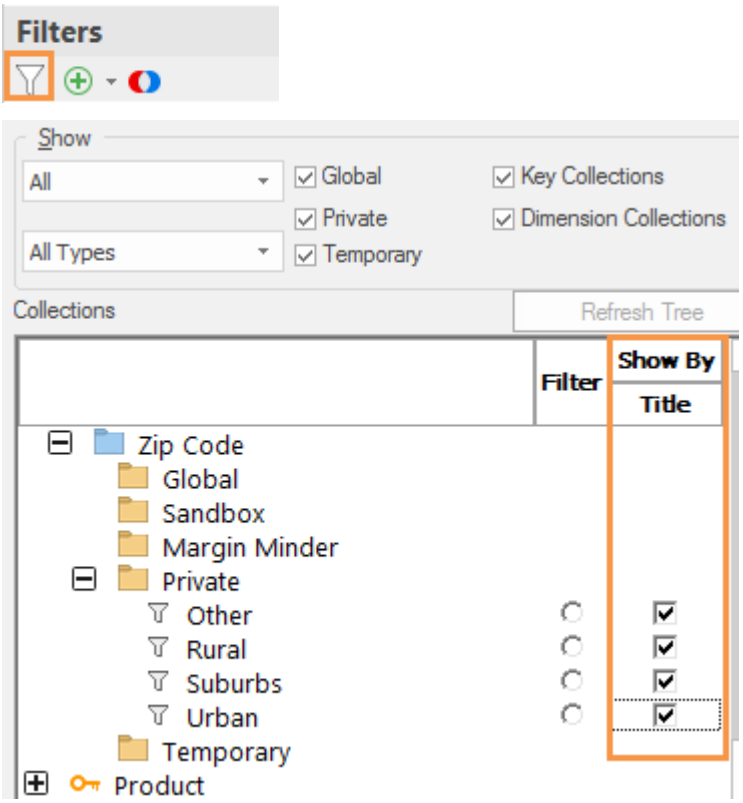
You can show a collection of dimension members by its title. This shows the collection as a whole so you can compare it with other collections and the total for the given context.



To show a collection by its title

1. If you haven't already, group By (see page 10) the dimension of the collection. This step is not required but is recommended in order to show the collection immediately after you turn it on.
2. In the **Filters** section of the context panel, click the button.
3. In the **Collection** dialog, check the **Show By Title** box in the row of the collection you want to display. This option is only available for dimension collections.
4. Check additional **Show By Title** boxes if you want to compare multiple collections.
5. Click **OK**.

Tip: To show an entire folder of collections by title, right-click on the folder name and select **Turn-On Show By Titles.**

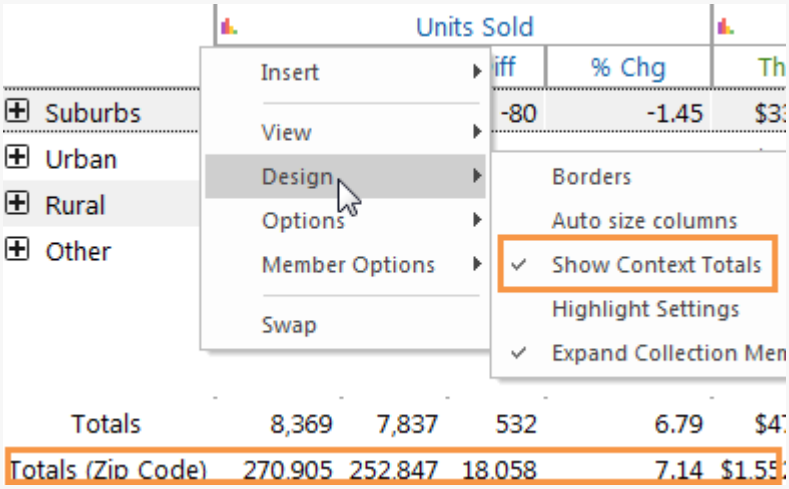


Tips:

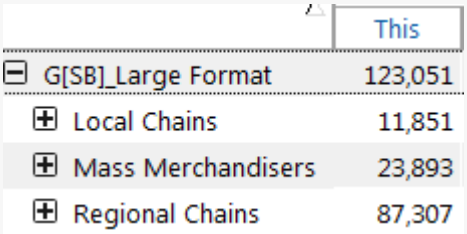
When Show By Title is on, the analysis shows the collection as a whole and treats it just like a dimension member, except that the focus window shows the characters "S-" (or "G_S-" if global).

Tips:

The "Totals" row only includes data for members of the selected collections. To add a row showing the total for all members in the context, you can turn on the **Show Context Totals** option.



You can select how SIM behaves when you expand members using the plus button ⊞. By default, the collection expands into the members of the next By. You can select the **Expand Collection Members** option on the tools menu (under Design) to expand a collection into the members of the collection.



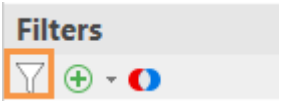
Create a collection

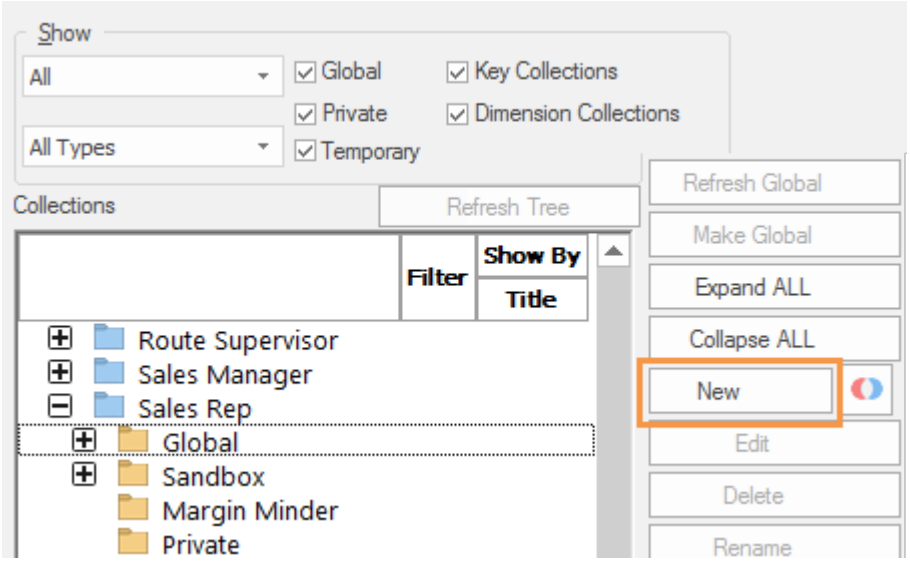
Create a classic collection

A classic collection contains a static list of members to allow you to filter out data for all other members.

To create a classic collection

1. In the Filtering section of the context panel, click the button.
2. In the **Collections** dialog, locate the row of the collection's key or dimension.
3. Underneath the key or dimension, select the category (global, private, etc.) and, optionally, subfolder where you want to save the collection.
4. Click **New**.

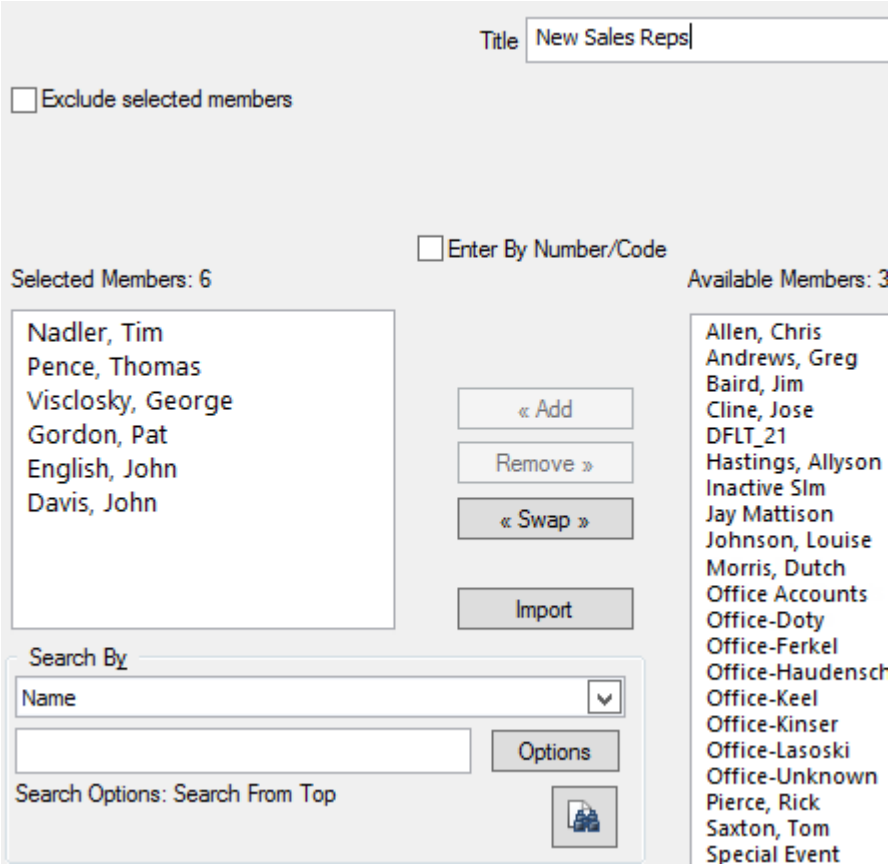




Tip: If you do not see the desired key, dimension, category, or folder, you may need to select options in the **Show** box in order to list more items in the collections tree.

To create a classic collection

5. In the **Edit Collection** dialog, enter a collection **Title**.
6. Under **Available Members**, highlight the members to add to the collection and click **Add**, or use other options in the Edit Collection dialog to add members.
7. When you are done adding members, click **OK**.



Tips:

You can also save checked members as a collection or create a classic collection using an exception test (i.e. Of These).

By default, collections filter out members that are not included in the collection. If you prefer, you can check the **Exclude selected members** box to filter out data for the collection members. This may help reduce the need to update collections in some situations. You cannot see the effect of this setting until you turn the collection on.

For key members only, if you want to select from a list of all members of the key, check the **Ignore Focus** box; otherwise, the Available Members list contains only key members in the current context.

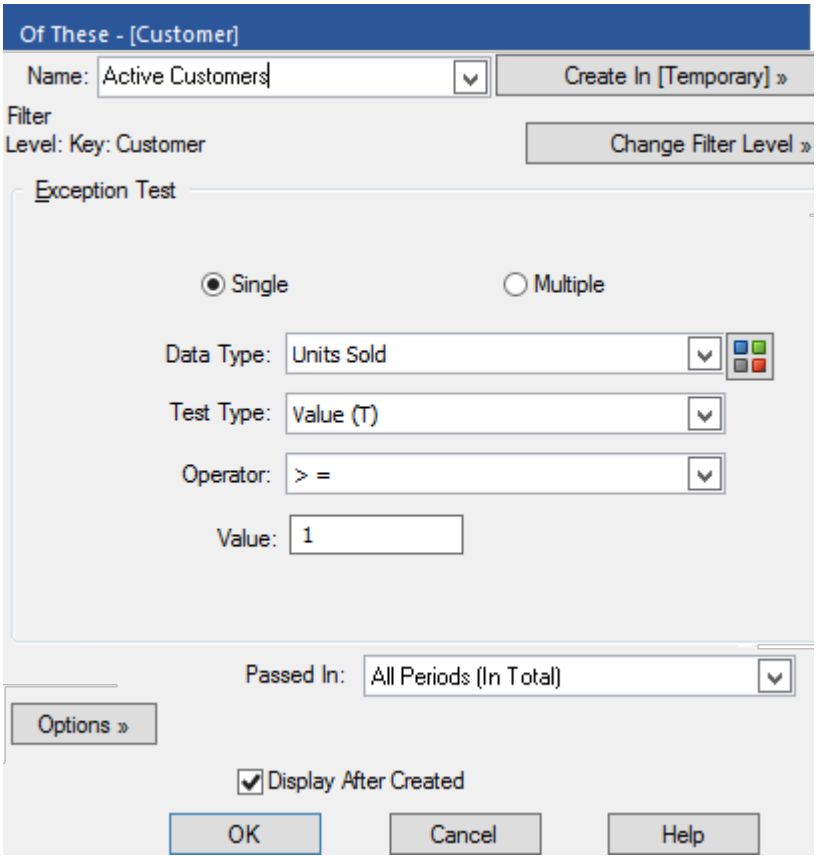
Create a dynamic collection (Of These)

A dynamic collection is a filter that dynamically updates based on test criteria, such as revenue above a given value. Every time you turn a dynamic collection on, SIM reruns the test based on the selected settings and your current view. This is different than a classic collection, which saves a static list of members. This type of collection is only available for members at the lowest level (e.g., customers).

To create a dynamic collection (Of These)

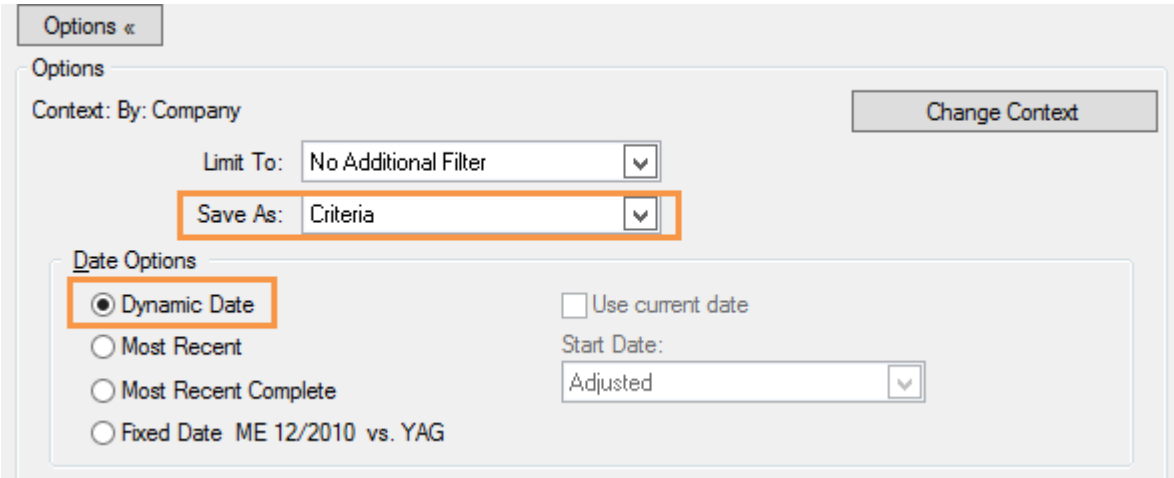
1. Before creating Of These:
   - We recommend removing all filters from the current analysis window unless the filter will be used for a specific purpose related to the dynamic collection.
   - Select the initial date settings (see page 7). Depending on the settings, this date range may dynamically update.
   - Turn on or off equivalents as desired. The Of These stores the equivalent settings used when it was created.

2. In the Filters section of the context panel, click the button.
3. In the **Of These** dialog, enter a collection name.
4. Click **Create In** to select a global or private folder.
5. Set the **Filter Level** to the key you want to test (e.g., customer).
6. In the **Exception Test** box, set the test criteria to determine which members pass (e.g., customers that bought at least one unit).
7. In general, we recommend leaving **All Periods (In Total)** selected under **Passed In** to consider the entire date range when determining which members pass. Additional options are available.
8. To immediately filter by the collection, check the **Display After Created** box.
9. If you wish, you can click the **Options** button to select from the following advanced options.
10. When you are done defining the collection, click **OK**.



Tip: Temporary collections are only stored for your current session. If you do not enter a name, the collection will be temporary.

Advanced options



Option	Explanation
Context	Shows your currently selected filters as well as the By. SIM will limit the collection to the members that belong to or have data for the filters shown here (regardless of the context settings used when the collection is turned on). To change any of the filters, click the **Change Context** button. This button also allows you to change the date range, modifiers, and more.
Limit To	Select whether or not to filter results based on the focus or currently checked members.
Save As	Leave **Criteria** selected in order to save the test settings as a dynamic collection so that it updates automatically. Otherwise, the collection will be a static list of members (i.e. classic).
Date Options	Typically, you would leave **Dynamic Date** selected so that the date range updates automatically based on the date range of the currently-selected view. However, additional date options are available.

Customize

Tools menu

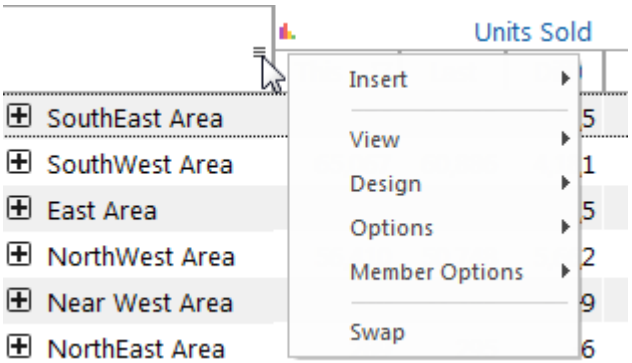
The tools menu includes various options to customize the analysis window.

To open the tools menu

In tables:

Place your cursor over the upper-left box.

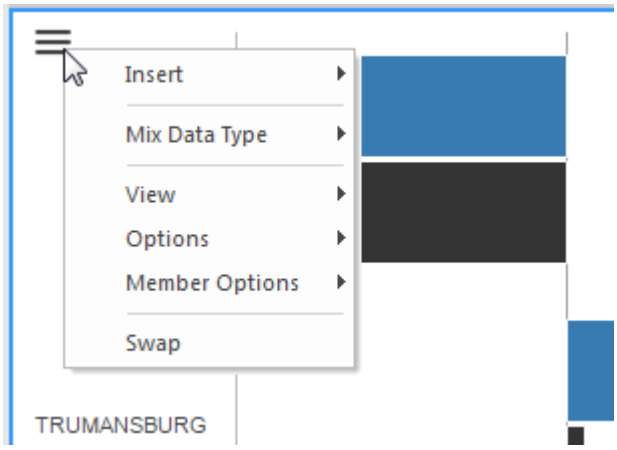
Click the ≡ icon that appears.



In graphs:

Place your cursor over the graph.

Click the ≡ button in the upper-left corner.



The available options depend on the analysis mode and format. The following list includes the more common options.

Option	Explanation
Insert	Insert a data field (see page 14).
View	Select a table or graph format.
Design (tables only)	
- Borders	Add and remove borders in tables.
- Auto size columns	Return columns to their default width.

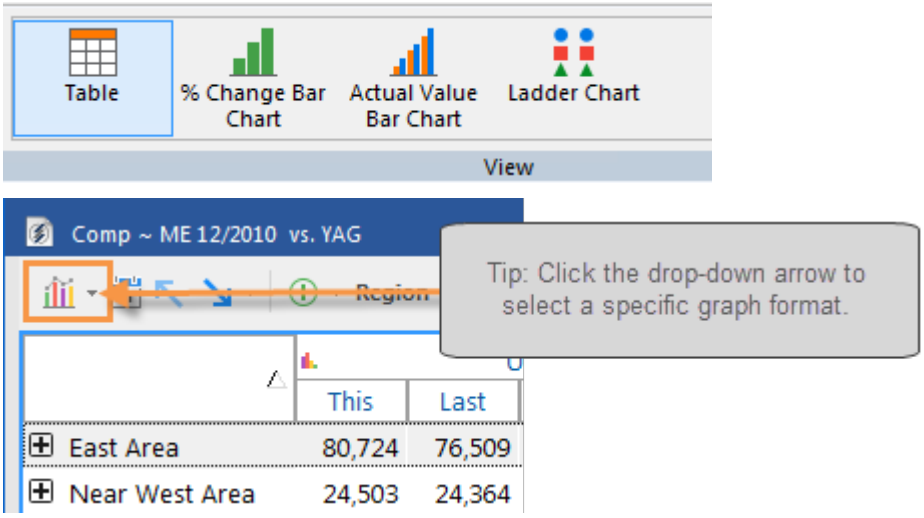
Option	Explanation
- Highlight Settings	Turn on/off and configure highlight settings.
Options	
- Tree Options	Expand or collapse dimension members.
- Sort	Select the primary or secondary sort (see page 30).
- Pointer Tools	Check or uncheck members; select the base for the Index pointer.
- Display Settings	In tables, you can **Remove key and dim counts** to prevent possible memory errors in large datasets. You can turn this option on in Comparative Dimension Members and other analyses, but counts will not be removed until you turn on a key list. In graphs, display settings may include 2-D/3-D, dynamic scaling, show or hide totals, and more.
- Item Description Format	Allows you to set options for displaying dimension member codes.
Member Options	
- Export	Export selected members to a text file.
- Import	Import a text file to create or append a collection.
- Save as Collection	Group selected members into a collection.
Swap	Swap columns and rows in a table or switch between vertical and horizontal bars in a graph.

Switch between table and graph formats

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

To switch between a table and a graph

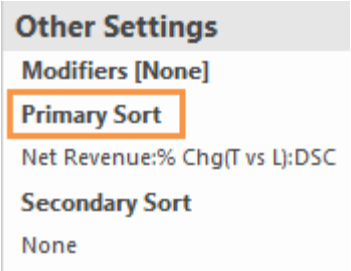
1. Select the analysis window you want to change by clicking on it.
2. Click the button of the desired format in the View section of the main tab, or click the numbers/graph button at the top of the analysis window.

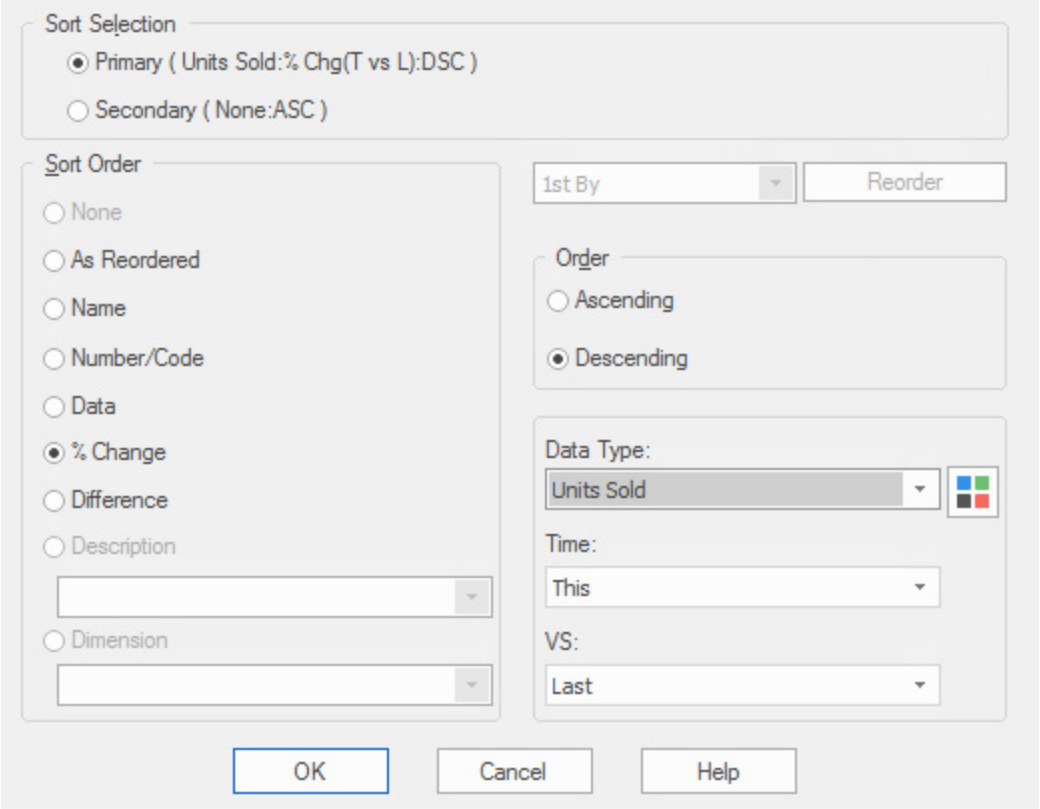


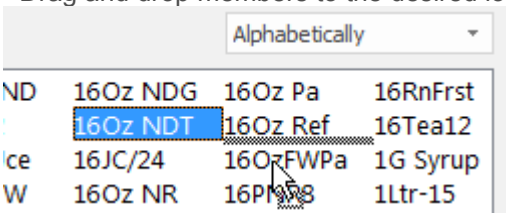
Sort

To sort

1. Click on the analysis window to select it.
2. Under Other Settings in the context panel, click **Primary Sort** or **Secondary Sort**.
3. Under **Sort Selection**, select whether you want to change the primary sort or secondary sort. The secondary sort is used to rank members that fall into the same place based on the primary sort.
4. Under **Sort Order**, select from the following sort methods.
5. Under **Order**, choose to sort in Ascending or Descending order (not used for "As Reordered").





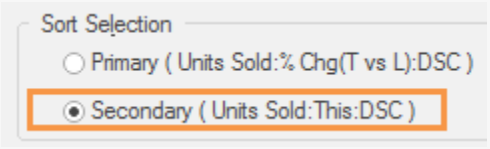
Option	Explanation
As Reordered	You can put members in a custom order. To use this option: 1. In the Sort Order dialog, click the **As Reordered** radio button. 2. From the drop-down menu by the **Reorder** button, leave 1st By selected to reorder the primary groupings, or select a different level of groupings to reorder. 3. Click **Reorder.** 4. In the **Reorder** dialog, do a combination of the following to place the dimension members in the desired order: - Choose from the drop-down menu to sort members alphabetically or as they are sorted in the current analysis. - Drag and drop members to the desired location in the window. 
Name	Sort by names/descriptions.
Number/Code	Sort by codes.

Option	Explanation
Data	Sort by a data field. To use this option: 1. Click the **Data** radio button. 2. From the **Data Type** drop-down menu, select the data field. 3. From the **Time** drop-down menu, select **This**, **Last**, or **Budget** if available.
% Change	Sort by percent change (not available in single time comparison). To use this option: 1. Click the **% Change** radio button. 2. From the **Data Type** drop-down menu, select the data field. **Tip:** By default, the analysis sorts by the percent change from Last date range to This date range (This-Last). You can change this calculation or sort by % difference versus budget (if available) using the Time and VS menus.
Difference	Sort by difference (not available in single time comparison). To use this option: 1. Click the **% Change** radio button. 2. From the **Data Type** drop-down menu, select the data field. **Tip:** By default, the analysis sorts by the difference from Last date range to This date range (This-Last). You can change this calculation or sort by difference versus budget (if available) using the Time and VS menus.
Invoice (Line Item only)	Sort records by invoice number
Date (Line Item or Time in Place only)	Sort records by date. For non-transactional records, this option sorts by the starting date.
Description (key lists only)	Sort by other key member descriptions, such as address, phone number, etc. To use this option, click the radio button and then select a description from the menu.
Dimension (key lists only)	Sort by dimension member, such as region, state, zip code, etc. To use this option, click the radio button and then select a dimension from the menu.
Sort records by invoice number (Line Item only)	Click the **Invoice** radio button.

Tips:

You can sort by a data field even if it isn't currently shown in the analysis window.

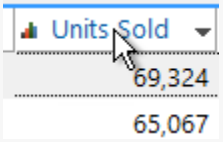
You can also change the secondary sort, which controls the order of members that have the same value for the primary sort. To do so, click Secondary Sort in the context panel or choose the Secondary button in the dialog.



This option is not available if you have reordered members.

Tips:

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



The window uses the selected sort method until you perform a new sort or turn on a key list. Key lists retain their own sort order.

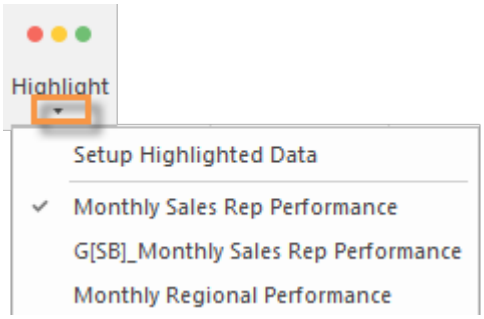
Highlighting

You can turn highlighting on to spot areas of concern or importance. Highlight settings can be customized and reused.

	Units Sold				Margin			
	This	Last	Diff	% Chg	This	Last	Diff	% Chg
Allen, Chris	11,113	6,811	4,302	63.16	$52,170	$21,752	$30,418	139.84
Andrews, Greg	3,502	3,479	23	0.66	$33,647	$25,402	$8,244	32.45
Baird, Jim	10,431	9,610	821	8.54	$50,703	$29,575	$21,128	71.44
Cline, Jose	95	49	46	93.88	$574	$285	$289	101.29
Davis, John	15,988	15,143	845	5.58	$80,971	$51,325	$29,646	57.76
English, John	13,229	9,872	3,357	34.01	$59,100	$32,742	$26,358	80.50
Gordon, Pat	20,572	18,820	1,752	9.31	$98,755	$74,034	$24,720	33.39
Hastings, Allyson	241	476	-235	-49.37	$2,023	$2,679	($656)	-24.50
Johnson, Louise	24,816	24,194	622	2.57	$143,920	$100,880	$43,040	42.66

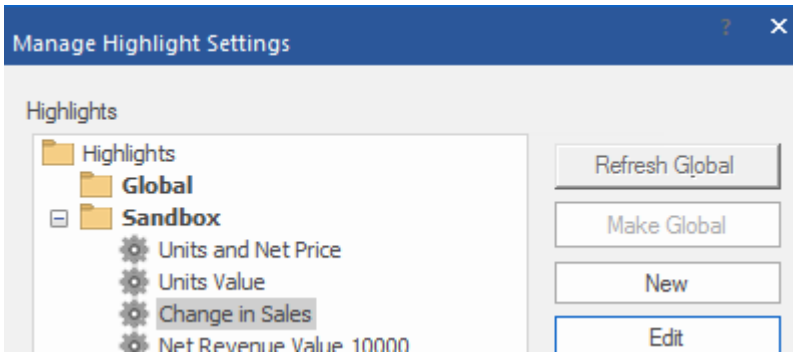
To turn on highlighting

1. Click the arrow under the highlight button.
2. You can select from a limited number of recently-used highlight settings in the menu, or select **Setup Highlighted Data** to access the dialog where you can access all highlight settings.



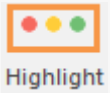
To turn on highlighting

3. If you open the dialog, select the desired highlight settings and click **OK**, or click **New** to add highlight settings.



Tips:

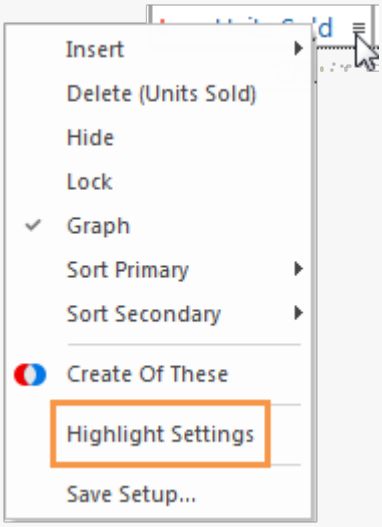
You can click the Highlight button in the setup section of the main tab to quickly turn on or off the most-recently-selected highlight settings.



You can apply new highlight settings to an individual column or row.

1. Place your cursor over the column or row and click the ≡ icon that appears.
2. In the menu, select **Highlight Settings**.
3. In the **Highlight Setting Info** dialog, define the highlighting criteria for the column or row.

SIM temporarily stores the new or updated highlight settings in an "Undefined" highlight setting. You can save these highlight settings to reuse them in future sessions by opening the tools menu and selecting **Design**, **Highlight Settings**, **Save Highlights**.



Preference settings allows you to change the shade of highlighting and the number of highlight settings listed in the drop-down menu.

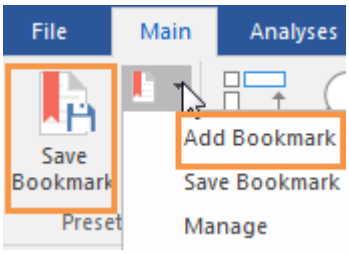
Save and Share

Bookmarks

You can create a bookmark to save and share a view of the data.

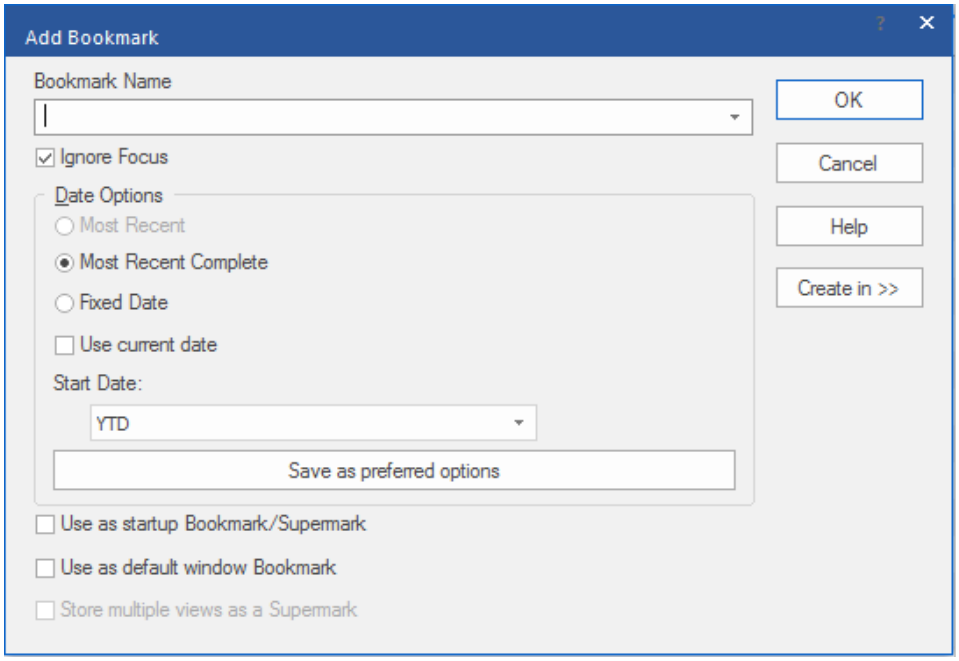
To add a bookmark

1. Set up one or more analysis windows to use the By, date range, data fields, filters, and any other parameters of the bookmark you want to create.
2. On the main tab of the ribbon control, click **Save Bookmark** or click the bookmark drop-down button and select **Add Bookmark**.



Tip: Both of these options open the same dialog when you create a new bookmark; if you are saving changes to an existing bookmark, the Save option loads the existing bookmark name and other options.

3. In the dialog, type a bookmark name and select from the following bookmark options.

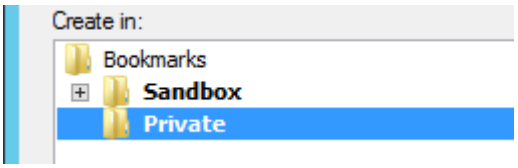


Option	Explanation
Ignore Focus	This option resets the focus to the first available member when viewed. **Tip:** When comparing members for an automatically updated date range (i.e., most recent or most recent complete), we recommend leaving this option checked to automatically go to the beginning of the list. In time-series views or other views that filter out data based on the focus member, we recommend leaving this option off in order to retain the filter.
Date Options	Choose how to update the date range of the bookmark.
- Most Recent	Automatically updates the date range to go to the most recent day(s), month(s), or period(s) in the selected data cube. This option can show incomplete months and periods. This option is not available for weeks (instead use Most Recent Complete).
- Most Recent Complete	Automatically updates the date range to go to the most recent complete week(s), month(s), or period(s) in the selected data cube. SIM uses a set of rules to determine what is considered to be complete. Most Recent Complete is not available for daily time resolution (instead use Most Recent).
- Fixed Date	Uses the date range selected during bookmark creation regardless of when the bookmark is opened.
- Use current date	This option is useful for budgets, non-transactional data, or other types of data cubes that may extend into the future. With this option on, SIM will use the current date of your system, rather than a future date in the data cube, to determine the date range when viewing the data.
- Start Date	For use with the Most Recent and Most Recent Complete options, this setting lets you control whether SIM will adjust the start date to use the same number of days, weeks, months, or periods as the original analysis, or adjust the number of dates to maintain a fixed start date. Select one of the following options from the **Start Date** drop-down menu: • **Adjusted** - will change the start date so that the results include the same number of days, weeks, months, or periods as the original analysis. The entire date range moves as time goes on. • **YTD** - Assigns the first day of the current year as the start date, regardless of the current date. With this option, the numbers of days, weeks, months, or periods change to include the first of the year through the most recent (or most recent complete) date. The date range grows as time goes on. • **Fixed** - Sets the start date of the original analysis as a fixed start date, regardless of the current date. With this option, the numbers of days, weeks, months, or periods change depending on when users view the data. The date range grows as time goes on.
- Save as preferred options	Save the currently selected **Date Options** as the default.
Use as startup Bookmark/Supermark	Use the bookmark as the initial view when you first start up or reset windows.

Option	Explanation
Use as default window Bookmark	Save as home view (new windows or when you click the Home button).
Store multiple views as a Supermark	Save all currently-open analysis windows, including the relative window sizes and whether or not their context bars are hidden, as a supermark.

To add a bookmark (continued)

4. Click **Create in**; then select the folder where you want to save the bookmark. If you have rights to create global user data, you can make a bookmark available to other users by saving it in a global category or one of its subfolders.
5. Click **OK**.



Tips:

All components (setups, collections, etc.) of global bookmarks must be global. If you are saving a global bookmark that includes private components (setups, collections, etc.), then you are prompted to make the private components global. In this case, SIM retains a private copy of the bookmark component(s), but uses the global component(s) in the bookmark.

If Knowledge Manager is configured, you can save a description and additional resources for the bookmark.

You can change the date options for a bookmark at any time, by selecting it in the bookmark management dialog and click the button.

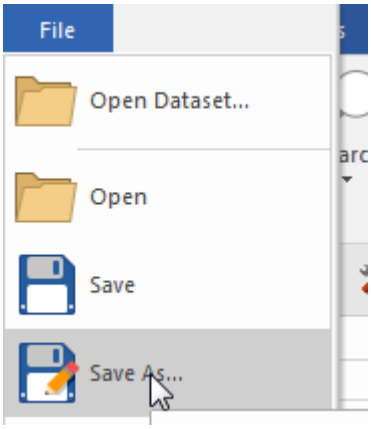
To edit any other aspect of a bookmark (By, data fields, etc.), open the bookmark, make the desired changes and then save the bookmark.

Export data

You may be able to export analysis data to a file that can be used in another application, such as Excel. If you want to export this information on a regular basis, you might want to create a macro (see page 50).

To export data

1. Click on the analysis you want to export in order to make it active.
2. On the **File** menu, select **Save As**.
3. In the **Save As** dialog, from the **Save as type** drop-down menu, select a file type.
4. Select a location and name for the file you want to export.
5. Click **Save**.



If you are exporting an encrypted Excel file, the **Enter Password** dialog appear. Type and re-type the password required to open the file. This password must meet security requirements.

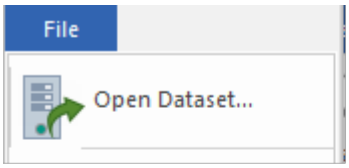
For all formats, output preference settings control what is included in the header.

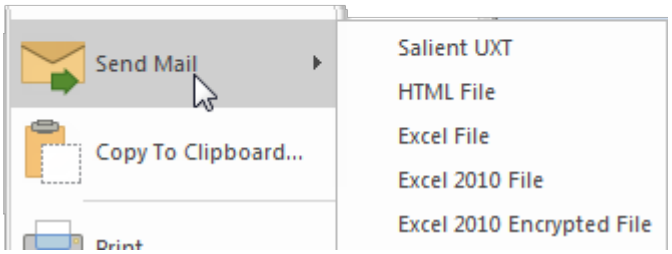
Email data

You can email data from an analysis in order to share it with others. This function only works with MAPI-capable email software that is properly configured prior to use. If you want to email this information on a regular basis, you might want to create a macro (see page 50). When you email from within SIM, the analysis or list becomes an email attachment in the selected format.

To email data

1. Click on the analysis you want to send in order to make it active.
2. On the **File** menu, select **Send Mail**.
3. On the submenu, select one a format.

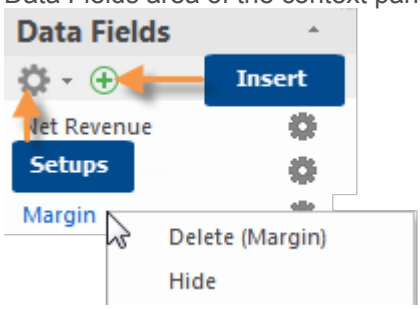
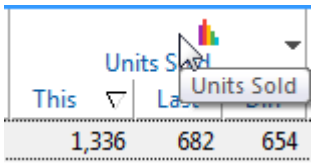


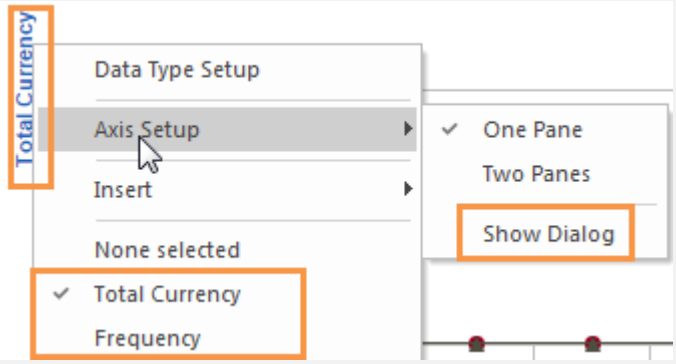
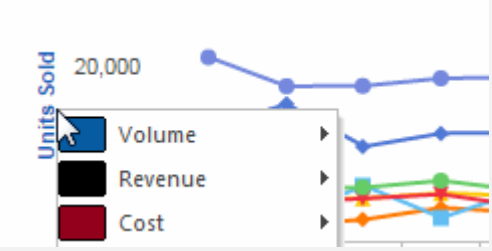


Advanced Topics

Select the data in graphs

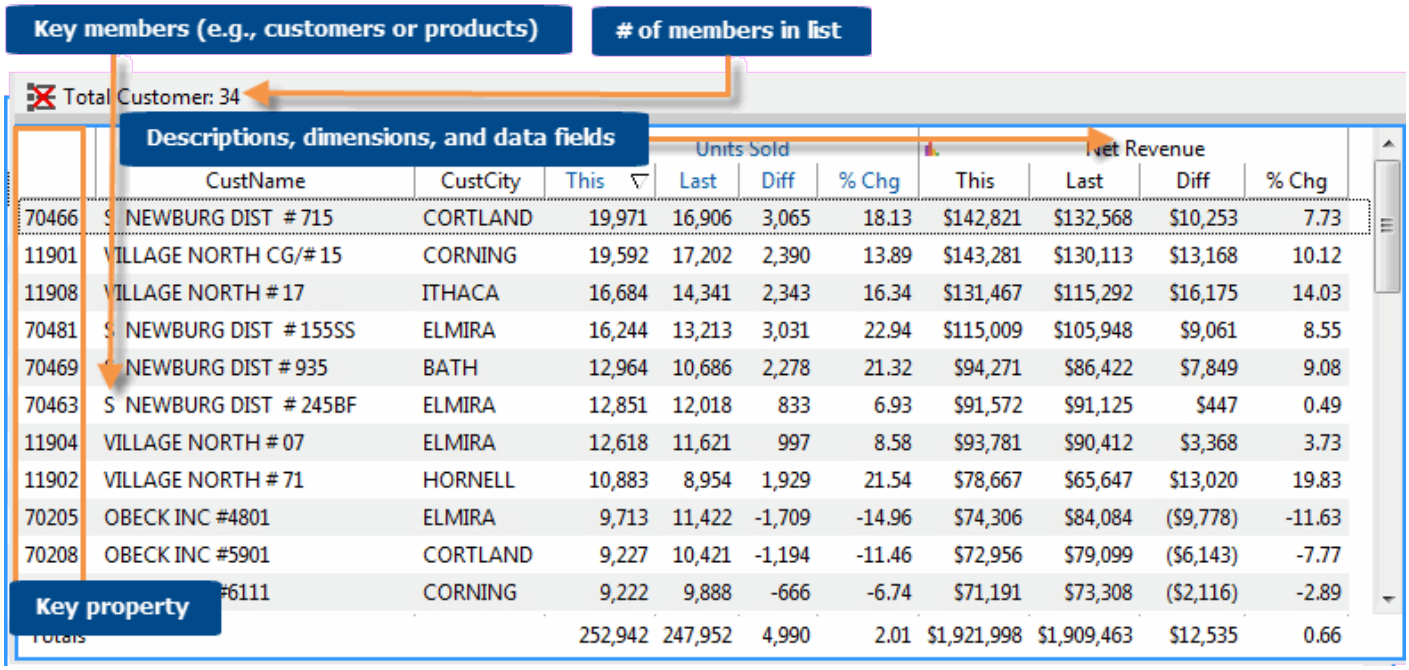
In general, you can select the data fields in graphs using the following methods

Graph type	General instructions for selecting data fields
Graphs that show multiple data fields: *Comparative percent change, Comparative Time Series percent change, Mix*	Insert data fields or select a setup with the desired data fields in the Data Fields area of the context panel.  These graphs are limited to the data fields that have been marked for graphs in the current setup. This setting is on for each data field by default; however, if you do not see a data field, you may need to mark it for graphs using the graph pointer in table format.  Depending on your preferences, the data fields shown in percent change graphs may also be limited by presence or absence of percent change or difference columns.

Graph type	General instructions for selecting data fields
Graphs limited to four or fewer axes (i.e., data families): *Comparative actual value & ladder, Normal Trend*	These graphs show up to four data families (volume, unit currency, total currency, percent, etc.) and/or individual data fields—two along the left axis and two along the right axis. The graph will automatically include data fields within the first four families of data in the setup; however, you can configure each axis by clicking the axis label and selecting a data family or opening the dialog. 
Analyses that show one or two data fields at a time: *Crosstab, Share Trend, Scattergram, Geo, Range, Exception, APM, Multi Comparative-2 and -4, Bubble*	Select the data field(s) or test under Data Fields/Setup in the context panel.  .
Analyses that allow multiple data fields but the graph format only shows one or two data fields at a time: *P&L, Comparative Time Series actual value & scatter time, Line Item*	Add the data fields to the analysis. Click the axis label to change the data field in the graph. 

Key lists

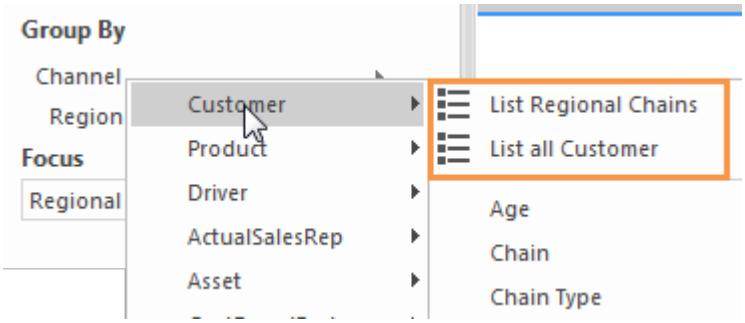
A key list is a table showing individual members of a key (e.g., customers). A key list is created when you "Group By" the key.



	CustName	CustCity	Units Sold This	Units Sold Last	Units Sold Diff	Units Sold % Chg	Net Revenue This	Net Revenue Last	Net Revenue Diff	Net Revenue % Chg
70466	S NEWBURG DIST # 715	CORTLAND	19,971	16,906	3,065	18.13	$142,821	$132,568	$10,253	7.73
11901	VILLAGE NORTH CG/# 15	CORNING	19,592	17,202	2,390	13.89	$143,281	$130,113	$13,168	10.12
11908	VILLAGE NORTH # 17	ITHACA	16,684	14,341	2,343	16.34	$131,467	$115,292	$16,175	14.03
70481	S NEWBURG DIST # 155SS	ELMIRA	16,244	13,213	3,031	22.94	$115,009	$105,948	$9,061	8.55
70469	NEWBURG DIST # 935	BATH	12,964	10,686	2,278	21.32	$94,271	$86,422	$7,849	9.08
70463	S NEWBURG DIST # 245BF	ELMIRA	12,851	12,018	833	6.93	$91,572	$91,125	$447	0.49
11904	VILLAGE NORTH # 07	ELMIRA	12,618	11,621	997	8.58	$93,781	$90,412	$3,368	3.73
11902	VILLAGE NORTH # 71	HORNELL	10,883	8,954	1,929	21.54	$78,667	$65,647	$13,020	19.83
70205	OBECK INC #4801	ELMIRA	9,713	11,422	-1,709	-14.96	$74,306	$84,084	($9,778)	-11.63
70208	OBECK INC #5901	CORTLAND	9,227	10,421	-1,194	-11.46	$72,956	$79,099	($6,143)	-7.77
	#6111	CORNING	9,222	9,888	-666	-6.74	$71,191	$73,308	($2,116)	-2.89
Totals			252,942	247,952	4,990	2.01	$1,921,998	$1,909,463	$12,535	0.66

To list key members

1. Click on the analysis window and then click the top level under **Group By** in the context panel.
2. Select the key, and then select a List option.



The first list option filters the data based on the selected focus. (e.g., only customers in the regional chains channel).

The second option (**List all** or **List for all**) turns off the focus and lists all members.

Tips:

If you don't see the key listed in the Group By menu or dialog, you may need to change the data cube.

You can insert data (see page 14), change the setup, and more to change the columns included in the key list.

Tips:

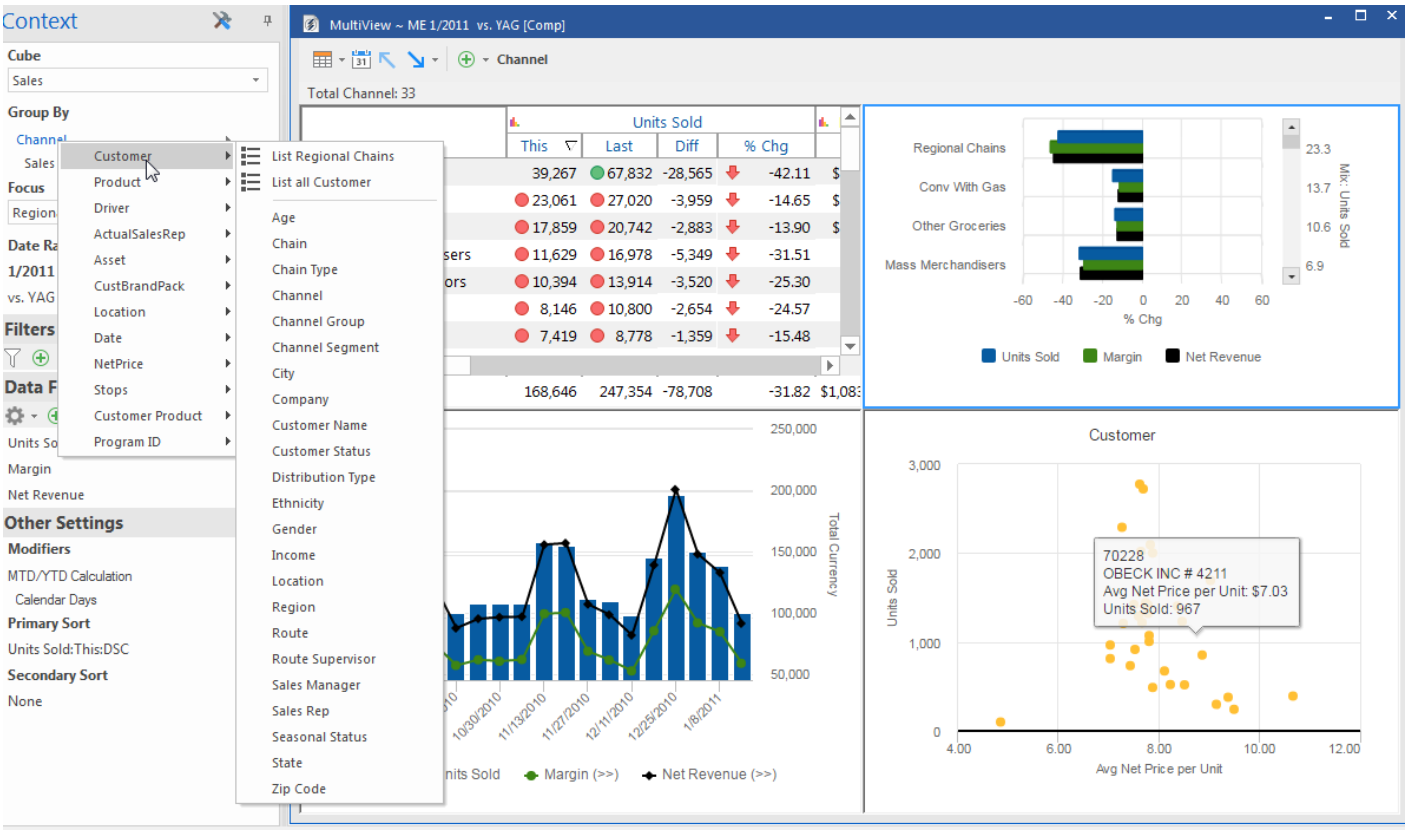
Depending on the analysis type, the key list may also be available in graph format.

You can click the button at the top of the analysis window to switch between formats.

To close the key list, click the Turn-Off icon at the top of the key list.

MultiView

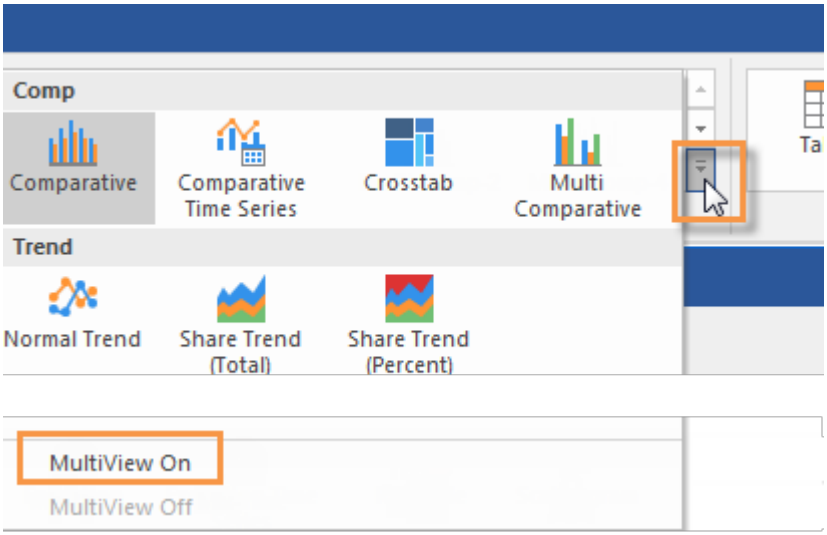
MultiView lets you control multiple analyses within one window with a single set of context settings. When you change the context (By, focus, filters, etc.), SIM updates all of the panes in the window accordingly.



To turn on MultiView

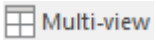
1. In the Main tab of the ribbon, expand the Analysis area and click the **MultiView on** option at the bottom.

   If the window is not already split, turning on MultiView splits the window into four panes using the default settings.

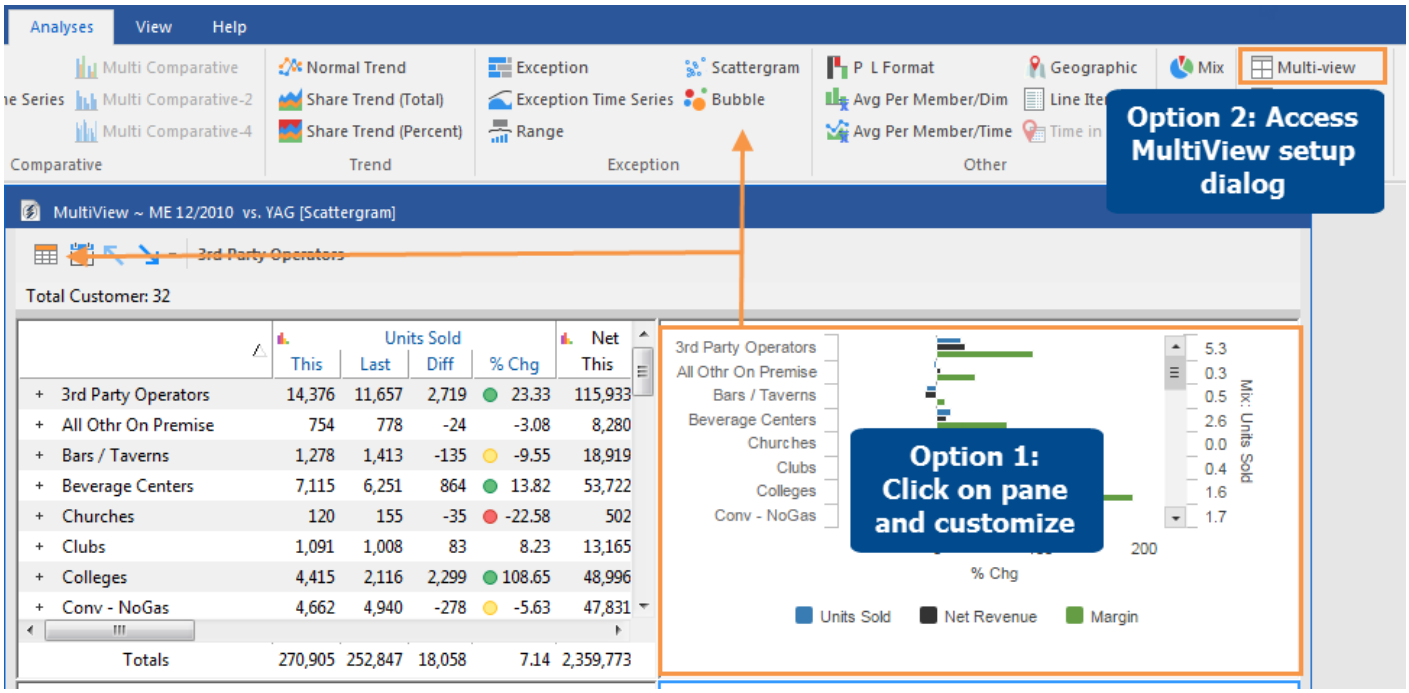


2. Customize the analysis type and format of any individual pane using either of the following methods:

   Option 1: Click on a pane and then make the desired changes.

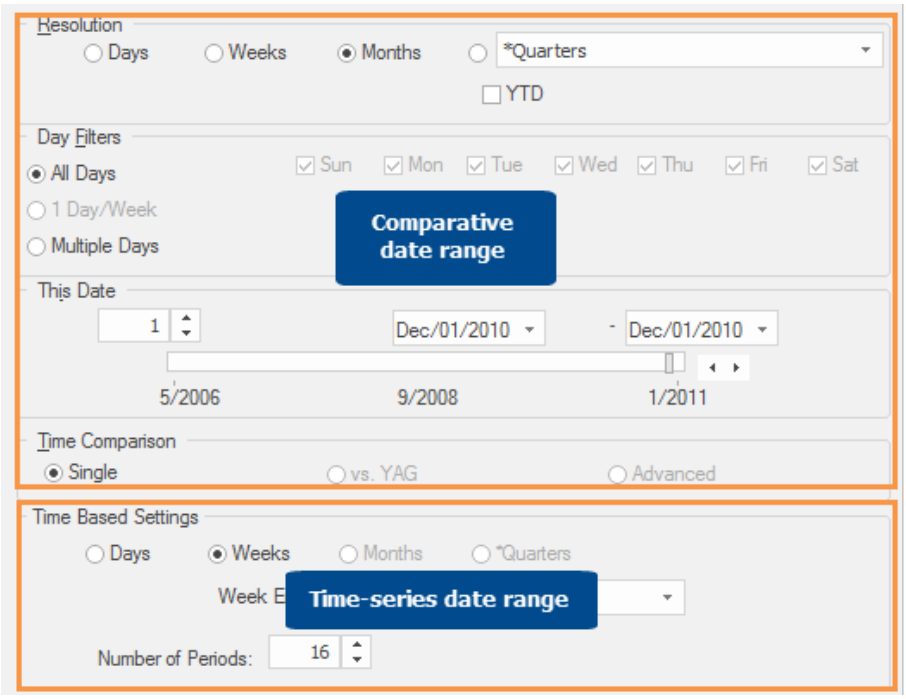
   Option 2: Set up MultiView panes from a dialog (click the 

button on the Analyses tab to access). This method also allows you to customize the time comparison and setup for each pane.



MultiView date ranges

MultiView allows you to define two date ranges—one set (This/Last) for comparative panes and another range for time-series panes. When you change the comparative date range, SIM updates all comparative panes; when you change the time-series date range, SIM updates all time-series panes.



Tips:

You can split a window without turning on MultiView; however, the panes will be limited to different formats of a single analysis type.

Multi Comparative-2, Multi Comparative-4, and Multi Comparative analyses are not allowed as part of a MultiView window.

To turn MultiView off, in the Main tab of the ribbon, expand the Analysis area and click the **MultiView off** option at the bottom

Save and Share

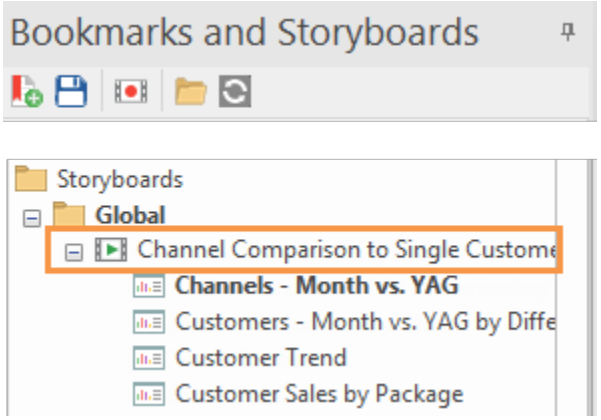
Storyboards

View a storyboard

Storyboards allow you to follow a path of investigation through pre-configured views or "steps" that can each have their own analysis type, format, and other settings. When you view a storyboard, you can drill on whatever item(s) interest you to go to the next step, which filters out all other data.

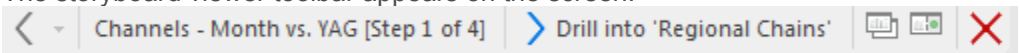
To view a storyboard

1. In the storyboards section of the bookmarks and storyboards panel, click on the name of a storyboard to open it. The selected window then shows the starting point or "initial step" of the storyboard in storyboard viewer mode.



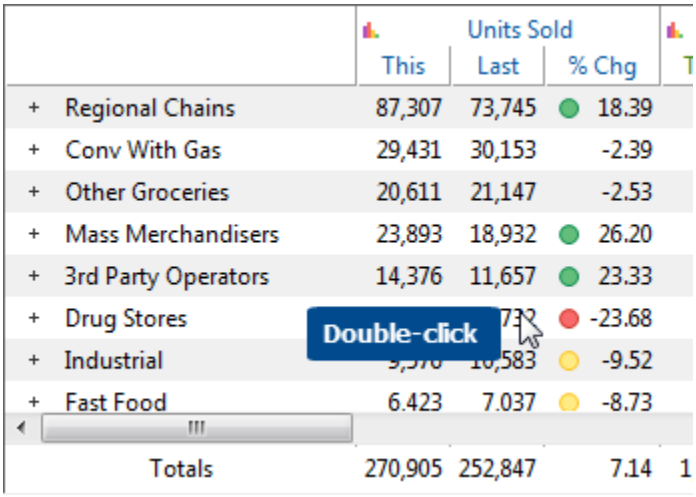
In storyboard viewer mode:

- The storyboard viewer toolbar appears on the screen.

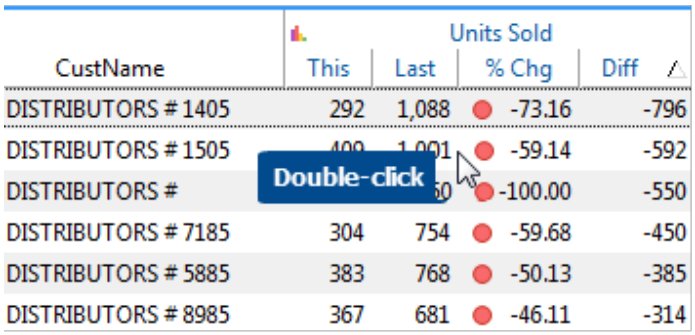


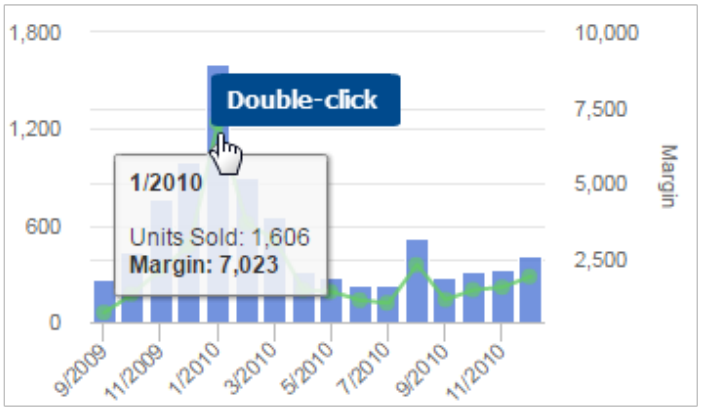
- Analysis types and some other controls are disabled because the storyboard controls the analysis type and other settings. You can adjust the sort and some other settings; however, these changes do not carry over between steps.

2. Move through the steps in the storyboard. In general, you can double-click on an item or date to drill down. Continue to move through the storyboard until SIM notifies you that you have reached its end.



Tip: At any time, you can exit the storyboard to continue your own path of investigation by clicking ✕ on the storyboard viewer toolbar. In addition, you can open a new window and follow your own path of investigation.

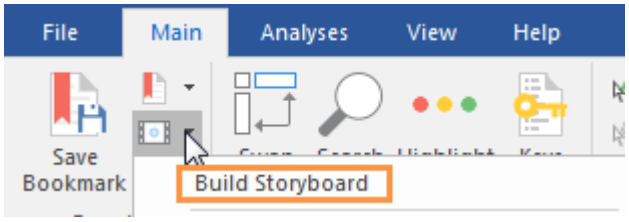




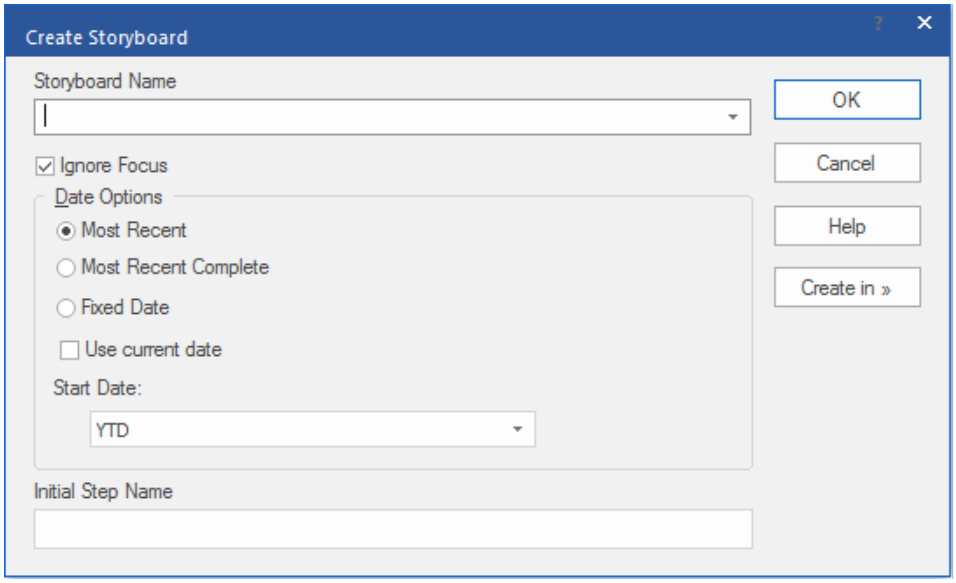
Create a storyboard

The first task in creating a storyboard is to set up its starting point or "initial step." You can then create the next steps in the storyboard by drilling, customizing, and saving each step.

To create a storyboard



1. Set up the analysis window to show the starting view of the storyboard by selecting the Group By, date range, analysis type, and any other parameters as necessary.
2. On the main tab of the ribbon control, click the storyboard drop-down button and select **Build Storyboard**.
3. In the **Create Storyboard** dialog, type a storyboard name and select from the following options, which are the same as options available for bookmarks (see page 35).



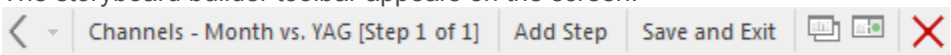
4. In the **Initial Step Name** box, type a name for the starting point of the storyboard.

5. Click **Create in**; then select the folder where you want to save the storyboard. If you have rights to create global user data, you can make a storyboard available to other users by saving it in a global category or one of its subfolders.
6. Click **OK**.

SIM saves the initial step and goes into storyboard builder mode so that you can create the next steps of the storyboard.

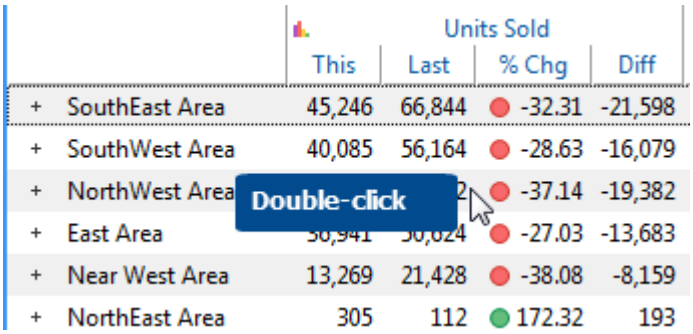
In storyboard builder mode:

- The storyboard builder toolbar appears on the screen.

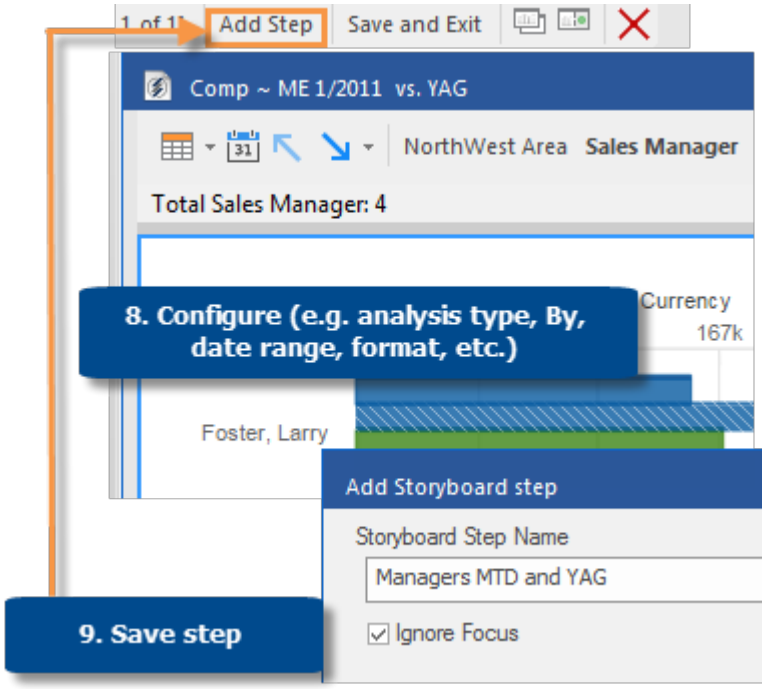


- Toolbar buttons and other controls are enabled or disabled based on what you are currently allowed to do.

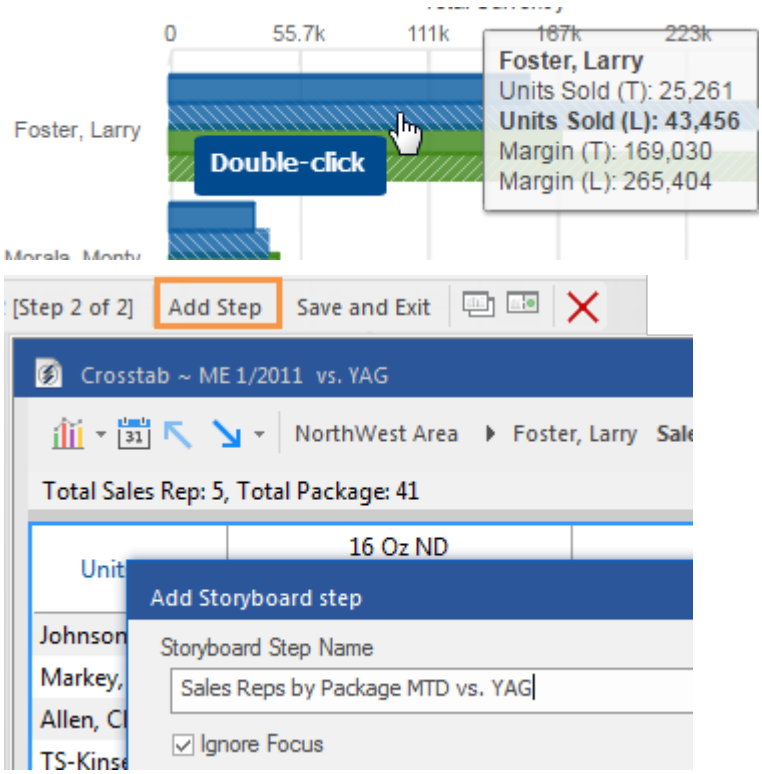
7. *Drill down* - If the next step should drill down, you can double-click on the member or date. Note that storyboard builder does not store the specific item(s) on which you have drilled down; instead, SIM will allow the user to select the item(s) when viewing the storyboard. If the next step does not drill-down, proceed to Step 8.



8. *Configure* - Customize the storyboard step by making the desired changes. For example, you might change the analysis type, graph format, By, data fields, sort, etc.
9. *Save* - On the storyboard builder toolbar, click **Add Step**. In the **Add Storyboard step** dialog, enter the name of the step and click **OK**. You are now ready to create another step in the storyboard if you wish.



10. For each step in the storyboard, repeat Steps 7 through 9... drilling down, making changes, and then saving the step each time.



11. When you are finished creating steps, click **Save and Exit** on the storyboard builder toolbar.

After creating a storyboard, you should view it (see page 45) in order to test its settings.

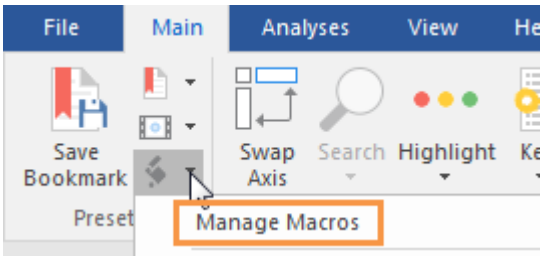
Tip: All components (setups, collections, etc.) of global storyboards must be global. If you are saving a global storyboard that includes private components (setups, collections, etc.), then you are prompted to make the private components global. In this case, SIM retains a private copy of the component(s), but uses the global component(s) in the storyboard.

Macros

Macros allow you to quickly print, export, or email commonly-used views of the data. You can run macros within SIM whenever you wish and/or automate reports by scheduling macros (see page 54). Possible output formats include Excel, TXT, HTM, etc.

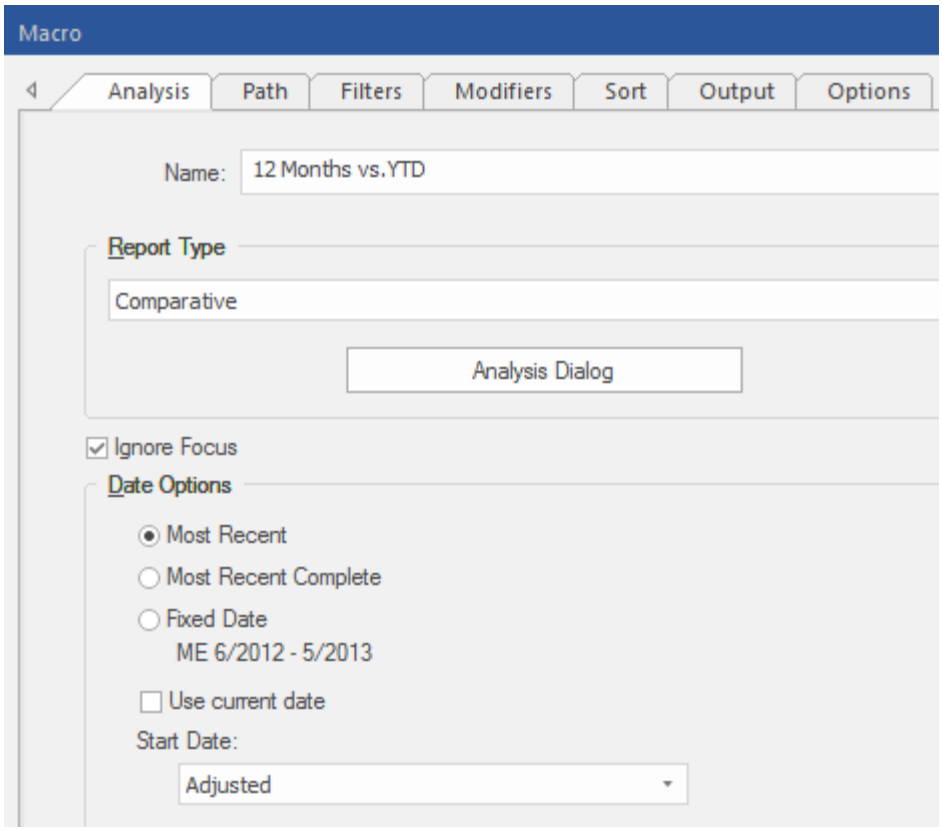
To create a macro

1. Set up an analysis to use the By, date, focus, sort, modifiers, collections and any other parameters of the view you want to export or print.
2. On the main tab of the ribbon control, click the macro drop-down button and select **Manage Macros**.



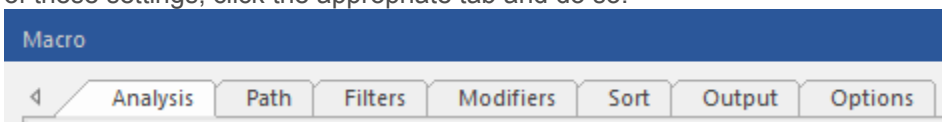
3. In the **Manage Macros** dialog, click **New**.
4. In **Analysis** tab of the **Macro** dialog, type a macro name.
5. Select from the following date options, which are the same as the bookmark date options (see page 35).

Tip: You can leave the Report Type options as is unless you want to change the analysis type, data fields, or specific date options, such as resolution and number of dates, from the analysis you configured in Step 1.



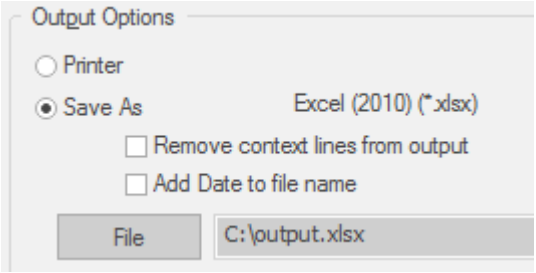
To create a macro (continued)

6. By default, the macro uses the same settings as the analysis configured in Step 1. If you want to change any of these settings, click the appropriate tab and do so.



- The analysis type and data field setup can be configured via the Analysis tab.
- The By, focus, and drill path can be configured in the Path tab. In addition, this area lets you output results FOR EACH dimension member.
- Collections can be applied and managed in the Filters tab. In addition, this area lets you output results FOR EACH key member.
- Modifiers such as calendar days can be turned on in the Modifiers tab.
- The sort order can be configured in the Sort tab.
- Table/graph formats, key list settings, and output options (e.g., print or save file) can be configured in the Output tab.
- Additional options related to expanding members can be configured in the Options tab (see below). This tab also allows you to configure highlight settings, hidden fields, and more.
- If configured, an Email tab allows you to email macro results (see Step 11).

To create a macro (continued)

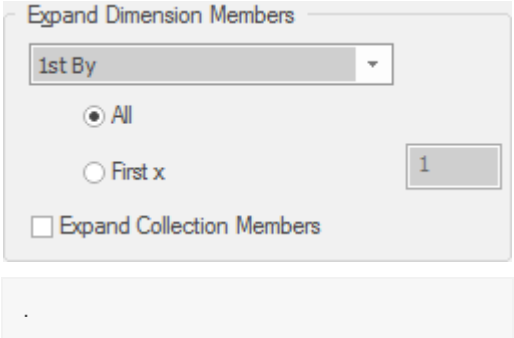


7. Click the **Output** tab,
8. Under Output Options, click the **Printer** radio button if you want the macro to print to your default printer. With this option selected, you cannot email macro results.

   Or, click the **Save As** radio button if you want the macro to export the results to a file. Optionally, check the **Add Date to file name** box if you want to append the file name with the date, therefore, creating unique file names so that results are not overwritten when the macro runs on a regular basis.
9. You can optionally turn off the header that includes the analysis type, date, and user name, etc., by checking the **Remove context lines from output** box. This option affects a single macro.
10. If you want the macro to email results, click the **Email** tab and select settings for emailing the results. Your administrator must enable this option in order to access this tab.
11. Click **OK**.

Options for expanding members

The following options allow you to include expanded subgroupings of the 2nd By, 3rd By, etc., in the macro results. To access these options, go to the **Options** tab. The macro will use the options selected here rather than the current analysis.



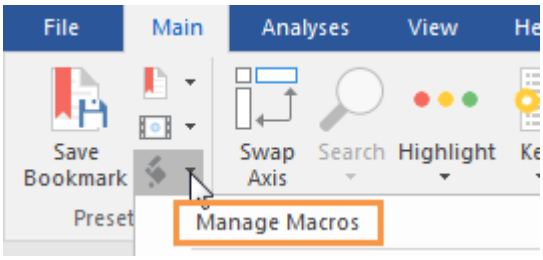
Scheduled macros

Enable scheduled macros and enter status email settings

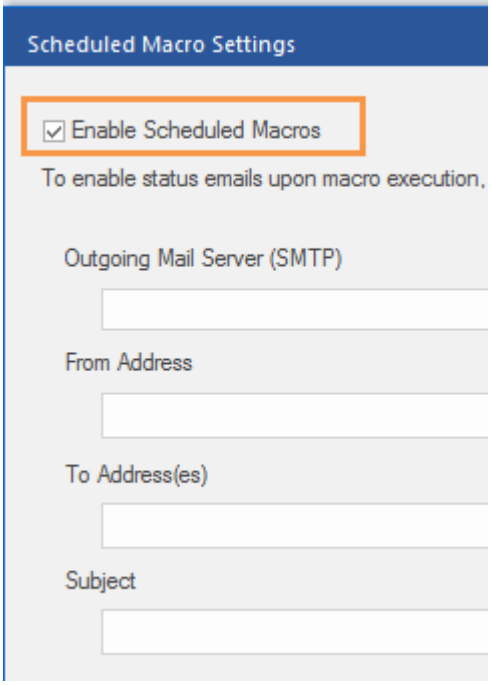
You can schedule a macro to run automatically using a task scheduling program and the parameters provided by SIM. A scheduled macro outputs the results to a file or email based on the specifications in the macro output (see page 50) and email settings. The following setup is required before you can schedule a macro (see page 54).

To enable macros and enter status email settings

1. On the main tab of the ribbon control, click the macro drop-down button and select **Manage Macros**.



2. In the Manage Macros dialog, click the **Schedule** button.
3. In the **Scheduled Macro Settings** dialog, check the **Enable Scheduled Macros** box.
4. Enter the following information to set up the status emails for all scheduled macros. These are not the same as the email settings for the results emails sent by macros.
   - **Outgoing Mail Server (SMTP)** - Select a server that has been entered by your administrator or enter a server.
   - **From Address**
   - **To Address(es)** - When entering multiple addresses, separate them with a semicolon (;).
   - **Subject**
5. Click **OK**.



Schedule a macro

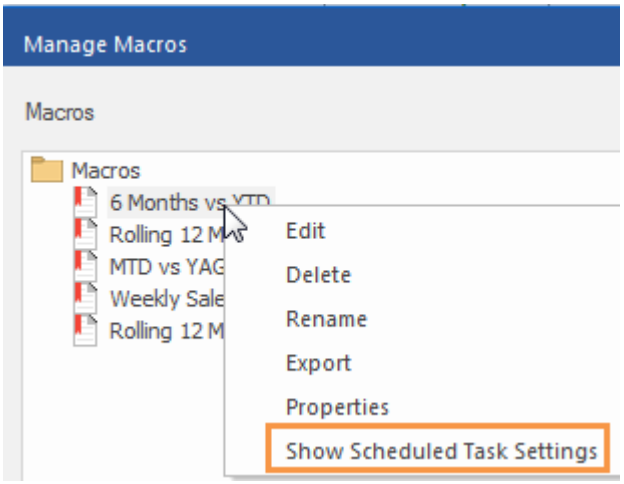
If you have enabled macros (see page 52) in SIM, you can schedule the macro in your preferred task scheduling program.

To schedule a macro

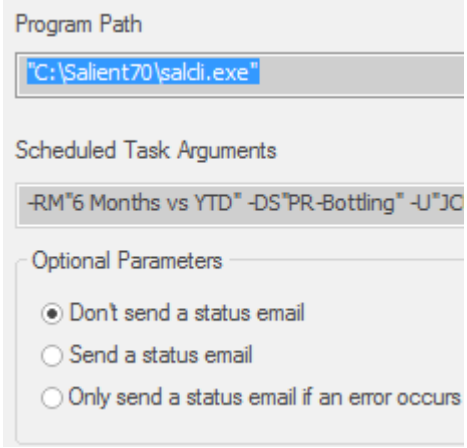
Follow instructions in the task scheduling program to create a scheduled task.

To access the necessary information to set up the task, including program path and scheduled task argument:

- Right-click on the macro or folder of macros in the Manage Macros dialog and select **Show Scheduled Task Settings**.



- In the **Scheduled Task Arguments** dialog, in the **Optional Parameters** section, choose an option for sending status emails.
- Copy and paste the program path and arguments from this dialog into the task scheduling program.



Tips:

Before you can run a scheduled macro that is stored in local user data, you must force a macro save, either by clicking the **Save** button in the **Manage Macros** dialog or by exiting SIM.

Scheduled macros cannot print. Any macros set up to print will be skipped if run via a scheduled task.

You can schedule multiple macros to run at once if they are located in the same folder. Right-click on the folder name to see its arguments.

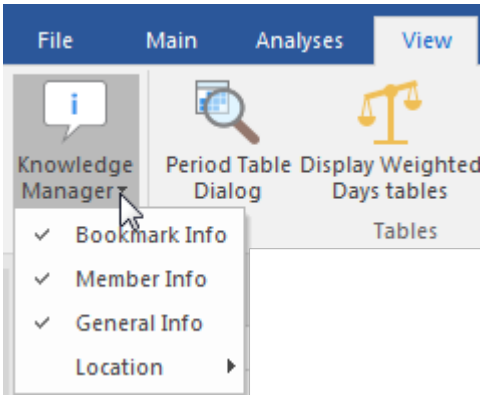
Knowledge Manager

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 panels

In the View tab of the ribbon control, click the Knowledge Manager button and then the name of the panel.

Knowledge Manager includes the following panels:



Bookmark Info

Allows users who create bookmarks and storyboards to write a descriptions and purposes for them.

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

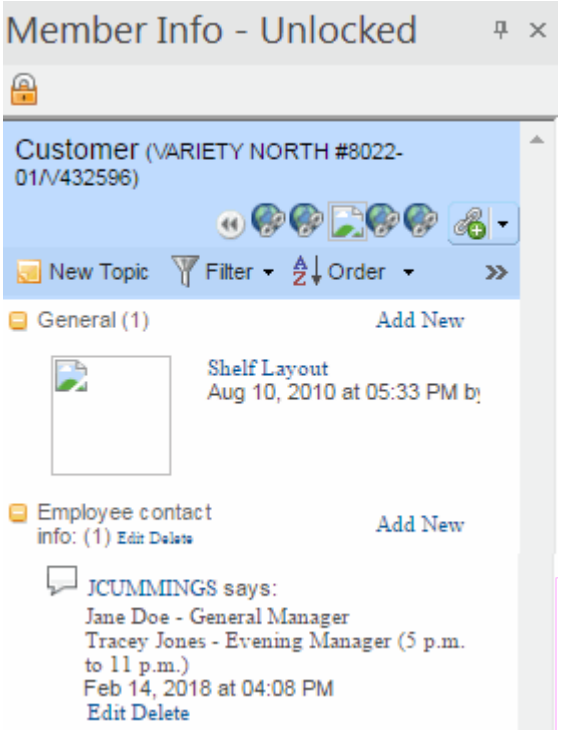
Member Info

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

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

Index/Search: search, view, or add information about the schema (keys, dimensions, data fields, etc.).