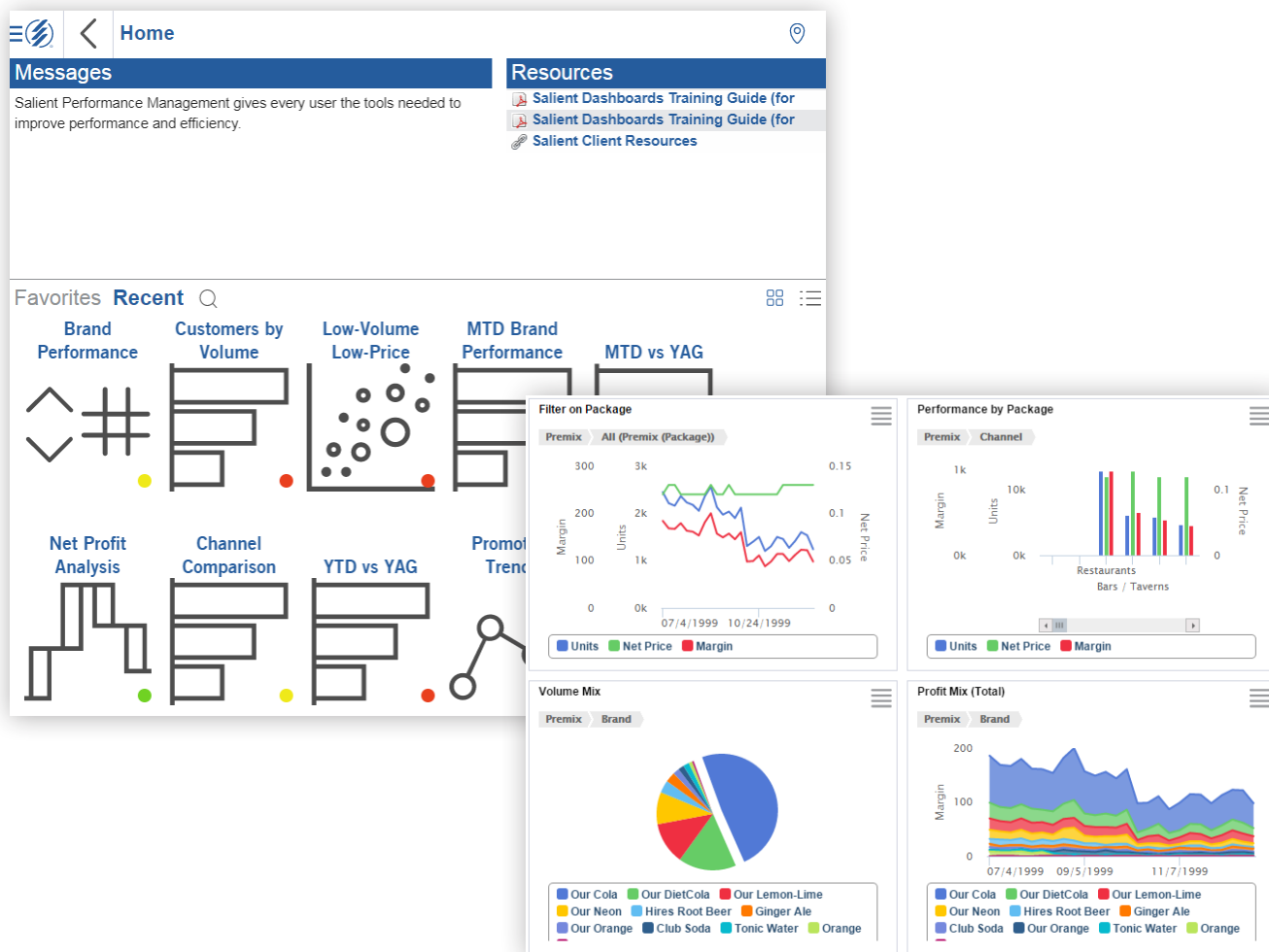


Salient Dashboards

# Setting up Salient Mobile 1.6

# Salient Mobile

Salient Mobile dashboards put the critical information at the fingertips of users on their mobile devices in a fast and easy-to-use app. Users can select information and view widgets just like in traditional web-based dashboards with the advantage of a simplified view that is touch-enabled and optimized for viewing on mobile devices.



## About the Solution

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

# Setting Up Salient Mobile

Follow the steps outlined in this document to make dashboards available in the mobile app. For more information about building dashboards, see the Salient Dashboards online help or user manual.

- 1 Build dashboards in Salient Dashboards "edit mode"
- 2 Publish dashboards in Salient Dashboards "edit mode"
- 3 Download, install, and log into Salient Mobile
- 4 Open the dashboard to view or edit
- 5 Edit the mobile dashboard layout
- 6 Share

---

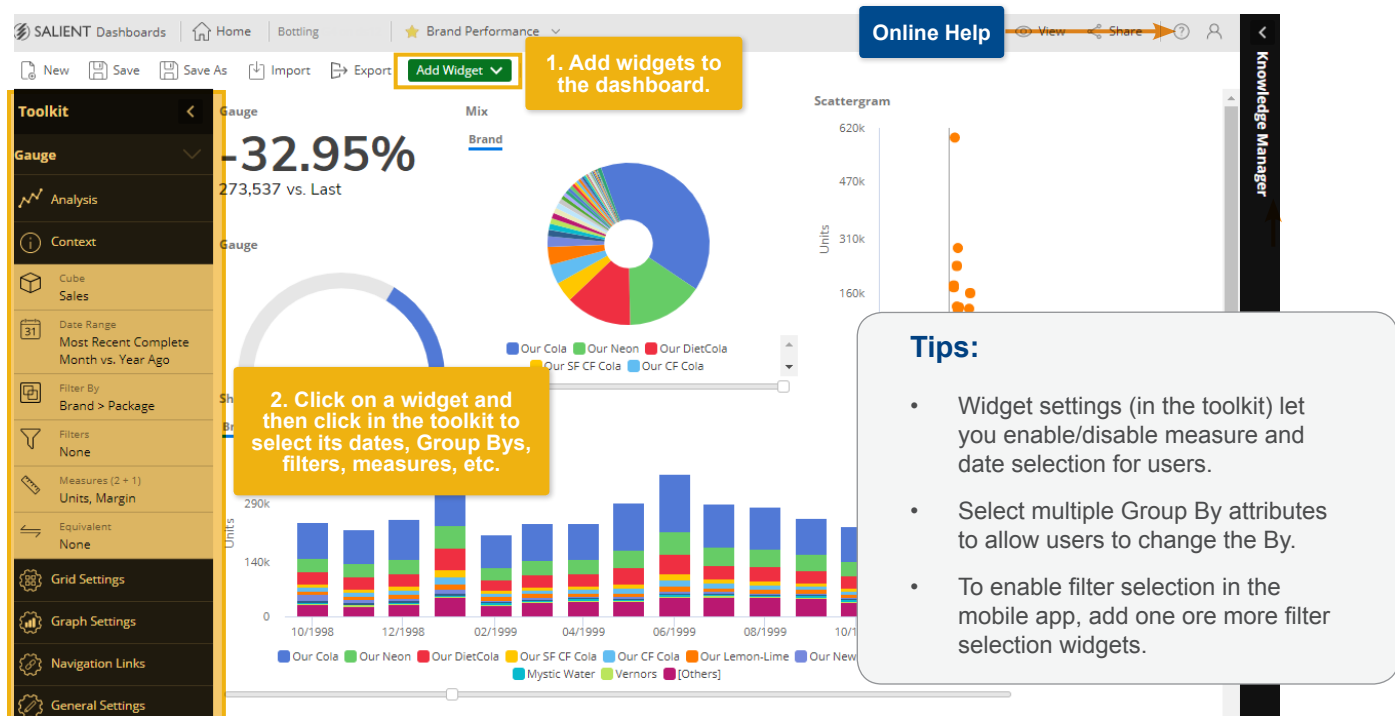
## How it works

Salient browser-based dashboards and the Salient Mobile app are fully-integrated. In the Salient Dashboards browser-based application, designers and builders can create and publish dashboards using a variety of widgets, filters, and customization options. All published dashboards will be available in the mobile app, with restrictions and customizations available depending on the user account. By default, dashboards appear in the app as a single pane with all of the dashboard's widgets available via scroll or "swipe"; however, users who have rights to modify mobile dashboard layouts can customize the layout for any dashboard in the mobile app, by adding panes to show widgets separately, selecting the widgets to show in each pane, changing the background color, adding a custom header, and more. The end result is a set of custom dashboards that are easily accessible and optimized for viewing from any device. Mobile users can also save dashboards offline for viewing when they are without an Internet connection, and then synch back up the next time they are connected.

## 1 Build dashboards in Salient Dashboards edit mode

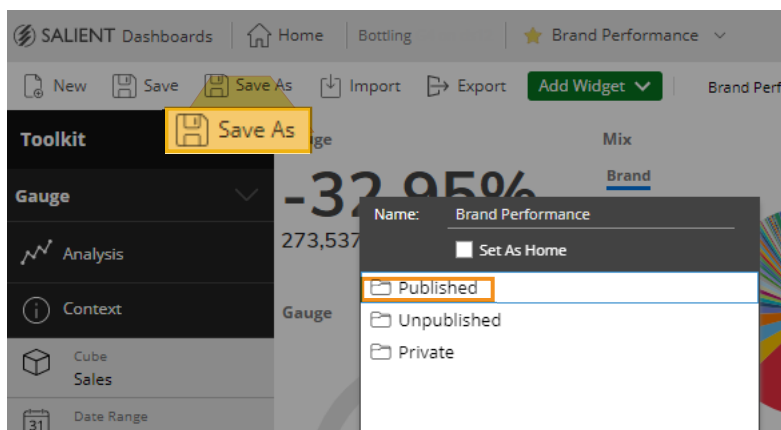
In dashboards "edit mode," build a dashboard by adding widgets, adding measures, selecting Group Bys, filtering, setting the date range, customizing widgets, and more.

See the Salient Dashboards online help, user manual, or training guide.



## 2 Save and publish in Salient Dashboards edit mode

Save the dashboard under "Published" to make it available in the mobile app. This also makes the dashboard available in Salient Dashboards "view mode" (i.e. view in browser).



### Tips:

- When you set the dashboard up for the mobile app, you will be able to change the layout and select any or all of its widgets.
- Only dashboards that have been published will appear in the mobile app.

### 3 Download, Install and Log Into Salient Mobile

You can download the app through the Google, Apple®, or Windows® public app stores.

In the app store, search for "Salient." Once you have located the "Salient" application published by Salient Corporation, follow the prompts to "get" or install the app. You can then open the app and log in as explained below.

#### Requirements:

1. The mobile app requires Version 5.76 or higher of Salient Dashboards. To take advantage of recent enhancements, we recommend using Salient Dashboards Version 7.0.
2. The mobile app can be run on any of the following mobile operating systems: Android™ v 5+ ; Apple (iOS9+); Windows 8.1
3. We recommend a screen size of 7 inches or more.

#### Log in:

The first time you start the mobile app, the login page may prompt you to enter the location of the Salient dashboards web application and select a dataset running at that location. You can also select a language in the setup area. (The language selection affects labels and menu options but not the dashboards themselves.)

English

Enter Location

Please enter the address (URL) of your Salient Dashboard application. For example:  
[www.company.com/SDM](http://www.company.com/SDM)


[www.mycompany.com/sdm](http://www.mycompany.com/sdm)

Bottling

Apply Offline

You can then enter your user name and password. The user account must belong to a user group with dashboard "Publish" rights in order to modify mobile dashboard layouts.

#### Tips:

You can access setup options at any time by tapping the Settings button (gear). 

Your administrator may configure pre-populated login settings (iOS only). See page 11.

**SALIENT** MANAGEMENT COMPANY

administrator

.....

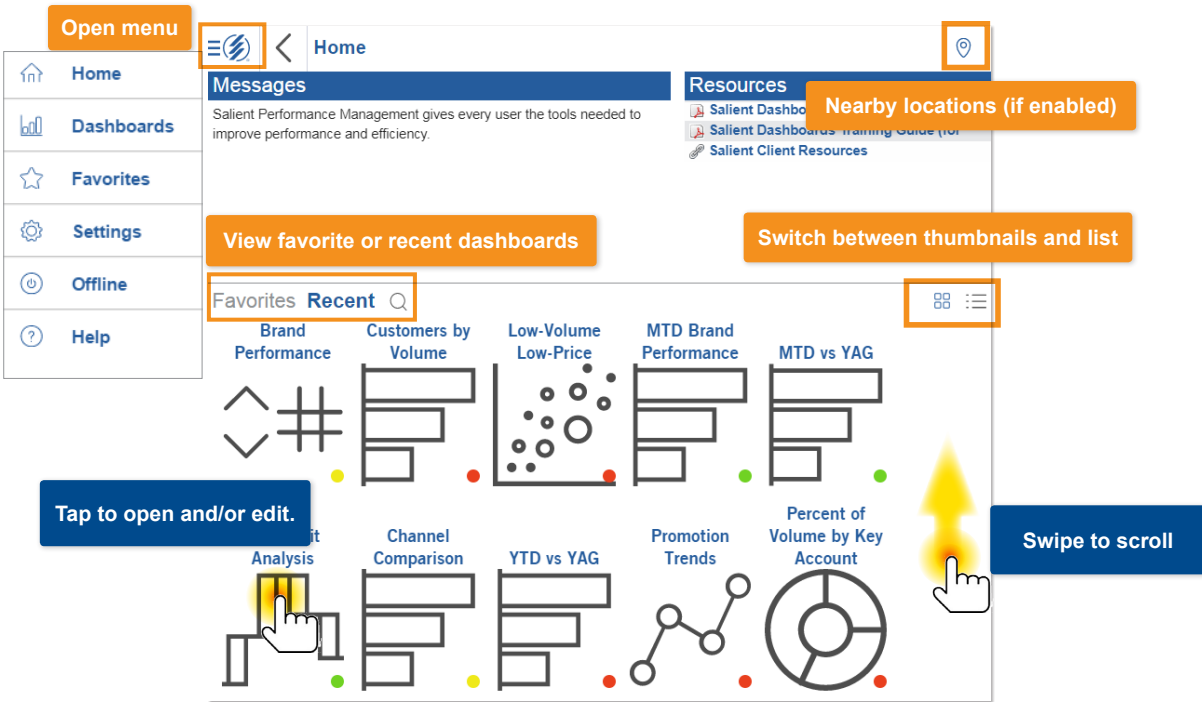
☐ Keep me logged in

Login Offline

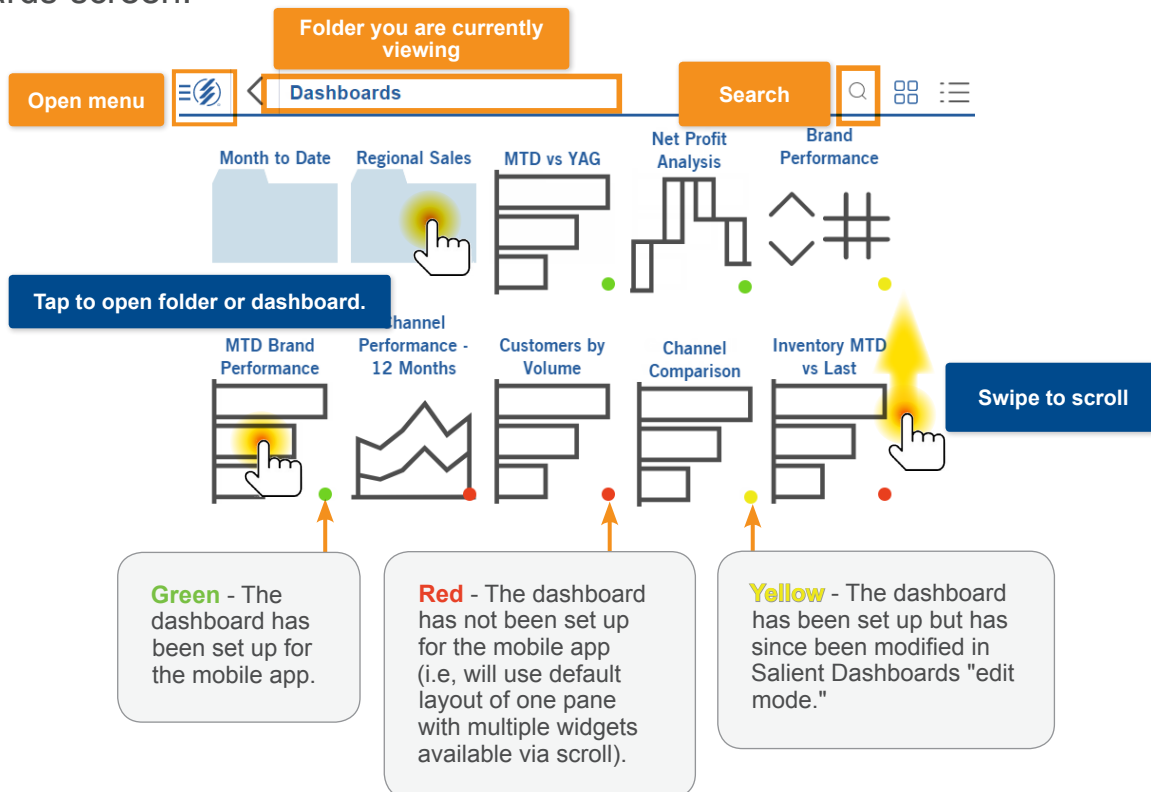
[Clear cached credentials](#)

## Salient Mobile App Screens

Home screen:

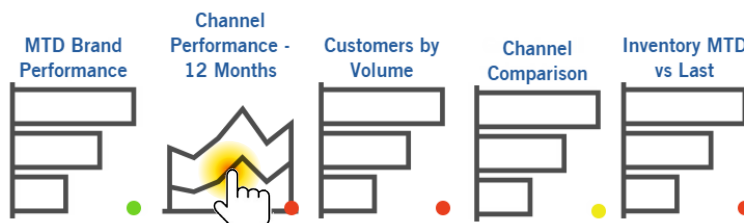


Dashboards screen:



## 4 Open a Dashboard

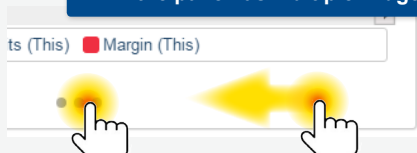
Tap on a dashboard thumbnail to open the dashboard in the mobile app.



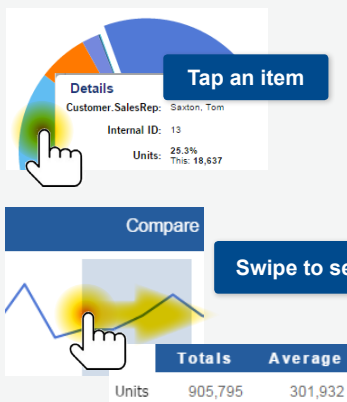
### Tips for viewing dashboards

#### Scroll:

Swipe the lower-right corner or tap the dots at the bottom to scroll if the pane has multiple widgets.



#### See details:



#### Group By (if enabled):

**Comparative**

Channel

Channel	Units	This ↓	Last
> Regional Chains		73,652	64,511
> Mass Merchandisers		32,844	23,234
> Conv With Gas		26,752	21,981
> Other Groceries			051

Tip: Tap the arrow to see additional levels of data.

#### Change widget options:

**Grid/graph toggle**

**Change measures (if allowed)**

**Change dates (if allowed)**

Tip: By default, date settings are linked between widgets in a dashboard (i.e., date setup affects all widgets).

#### Filter:

**Open filters area.**

**Choose filters or load saved filters.**

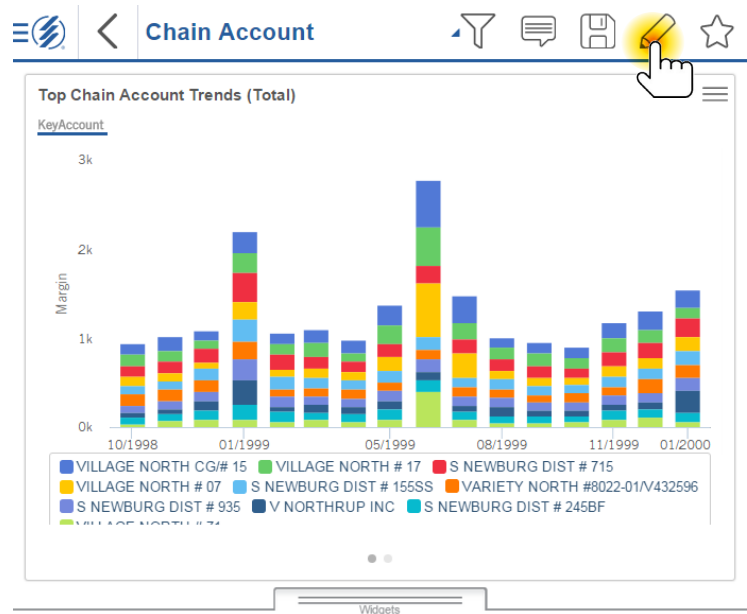
Tip: This is also where a date selector menu is located (if configured).

#### Save for offline use:

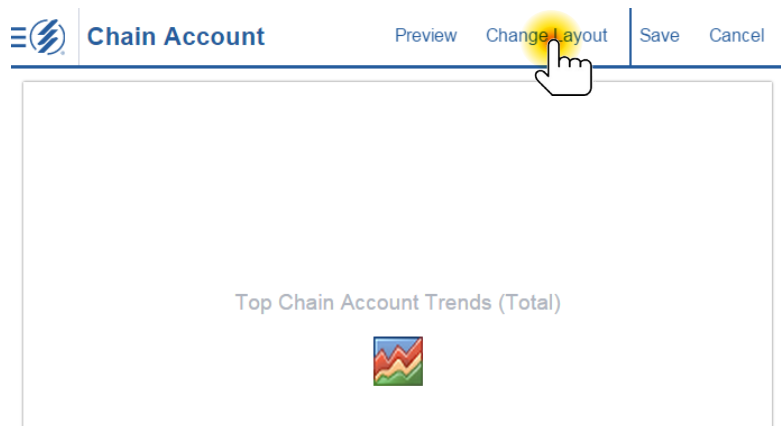


## 5 Edit the Mobile Dashboard Layout

After opening the dashboard, tap the edit button to create or edit the dashboard's mobile layout.



Next, tap on Change Layout to open the wizard.





## 5 Edit the Mobile Dashboard Layout (continued)

Select layout options in the wizard.

The Dashboard Widgets area shows the available widgets in the dashboard.

1. Select a layout. Keep in mind that you can show multiple widgets in a single pane. In this case, viewers will be able to "scroll" to the next widget.

2. Select whether or not to include a custom header. You can enter the text for the header in the next screen.

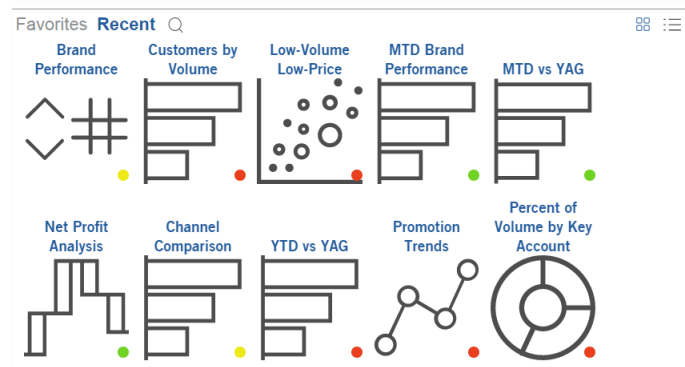
3. Select a background color.

Select widget(s) to show in each pane.

## 6 Share

### Share mobile dashboards

The mobile app automatically provides access to all published dashboards.



**Tip:** Tell users the location of the Salient dashboards web application. They will need to enter this location the first time that they log in.

English

#### Enter Location

Please enter the address (URL) of your Salient Dashboard application. For example:  
**www.company.com/SDM**

www.mycompany.com/sdm

Bottling

Apply

Offline

### Knowledge Manager

Knowledge Manager enables users to share thoughts or “soft knowledge” for collaboration. If installed with a SIM/Dashboards setup, the information is sharable between SIM, Salient Dashboards browser-based “view” and “edit” modes, and the mobile app. Several configuration steps and security rights are required before Knowledge Manager panels are available. Contact the Salient support desk for more information.

#### To access Knowledge Manager:



Tap the Knowledge Manager button.

#### Knowledge Manager

Dashboard Info

Member Info

##### Description

Edit

Price management: Note fluctuations in price and the resulting net revenue in the trend graph. The pie chart shows which brands had the most revenue during a given timeframe.

##### Resources(1)

Add

News article 4/18/15

##### Comments (1)

Add

ADMINISTRATOR says  
Significant dip following the Fall '14 promotion.  
April 22, 2015 at 1:40 PM

# Advanced

## Pre-configured login settings (iOS only)

Using mobile device management (MDM) software, you can optionally push the following login information to mobile app clients to automatically populate these fields in the login page. Refer to the documentation on the MDM you are using for additional instructions. This feature is currently only available on iOS.

Key	Type	Description
serverUrl	string	URL of the Salient Dashboard web application
serverIndex	int	The index of the dataset you wish to connect to for the configured dashboard server. If you only have one dataset, then the serverIndex should be 0.
username	string	If specified, the username field will be populated with this value.
password	string	If specified, the password field will be populated with this value.
language	string	The mobile app will initially load with the specified language. Supported options include: chinese, english, german, japanese, portuguese, and spanish.

## The mobile configuration file

You can create a mobile configuration file to customize branding and configure location services. You can use one mobile configuration file if you use a single dataset or you want to use the same settings across multiple datasets. In this case, the file should be named MobileConfig.json and located in the root dashboards web application folder (e.g., wwwroot/SDM). See the following topics for information on the available configuration settings in this file. If you want to use different settings for different datasets, you can create a unique .json file for each dataset and then specify the .json file name in the server definition in the Salient Dashboards sysconfig.xml file.

### To use different mobile configuration files (.json) for different datasets

1. Create a .json file for the dataset. The .json file should be located in the root dashboards web application folder (e.g., wwwroot/SDM). Refer to the following topics for more information on configuration settings in the .json file.
2. Open the Salient Dashboards sysconfig.xml file.
3. In the UXTServer section for the dataset, add a configMobileFileName parameter equal to the name of the .json file. See the following example. If you omit this parameter, the Salient Mobile app will use the MobileConfig.json for all datasets.

```
<uxtServer host="123.456.789.01" storageHook="123.456.789.01" displayName="MySet1"
configDSFileName="config.DSN.MySet1.xml" configGUIFileName="config.GUI.MySet1.xml"
configKMANFileName="kmanConfig.MySet1.xml" configMobileFileName="MobileConfig1.json"
description="Main dataset" />
```

# Advanced

## Custom branding

You can optionally apply a custom color scheme to the mobile app using the following instructions. Custom branding uses an external CSS stylesheet to define the mobile app colors.

### 1. Modify the mobile configuration file.

You may need to create this file if you haven't already. See the previous topic "The mobile configuration file" for information about the required file name and location and, optionally, how to use different mobile configuration files for different datasets.

Within the mobile configuration file, specify the location and name of the .css file and, optionally, a series of colors to override the default colors used in graphs (pie slices, bars, etc.). You can enter the date or another unique identifier after the .css file path and name to determine when to use the cached version of the .css file or download the .css file.

Example:

```
"cssPath": "css/MobileApp.css?05-17-15",
  "chart": {
    "seriesColors": ['#003366', '#800000', '#99CCFF', '#9933FF', '#009933', '#FF0000',
    '#FF66FF']
```

### 2. Create a .css file (e.g., MobileApp.css)

This file defines the specific colors to use for various elements of the mobile app. If you use multiple mobile configuration files, you can also use multiple .css files with different settings for different datasets. We recommend storing the .css file(s) in the SDM/css directory; if the .css file is not located within the dashboard web application directories, then you must enter the full path in the mobile configuration file explained above. The following components can be defined within the .css file.

Selector	Explanation
<b>Main background</b>	Blue font on white background by default
.primary-section	
.primary-font-color	
<b>Headers</b>	
.primary-header	Top toolbar on each page
.active	Active tab text in Fav/Recent
.inactive	Inactive tab text in Fav/Recent
.secondary-header	Messages/Resources header on home page
<b>Menus</b>	
.salient-menu	
.dashboard-menu	
.main-menu	

Selector	Explanation
<b>Dialogs</b>	
.salient-dialog	Most pop-ups
.salient-alert	Alerts such as "Lost Connection"
<b>Icons</b>	Default icon class for icons that don't have a more specialized class. Use fill:#color.
salient-menu-icon	
<b>Sidebars</b>	
.salient-sidebar	
.kman-sidebar	
.filter-sidebar	
.sidebar-header	
.filters-heading	
.knowledge-heading	

# Advanced

## Location services

You can optionally configure location services to allow users to find nearby locations defined within the dataset. For example, users could find nearby customers or assets. The dataset must have a geographic data cube in order to configure and turn on location services.

### 1. Create a default location services dashboard.

The information displayed by each result in the location services panel is based on a default dashboard. Create a default dashboard with the following elements:

- Add a widget that lists out members of the geo-coded key.
- In the widget, add all of the dimensions and key description fields you want to show in the Location panel. You can format and configure the order of these fields in Step 3.
- Add at least one measure to the widget. The Location panel will show the values and percent change for the first measure listed.
- Turn on highlighting for a measure. The Location panel will show a highlighting indicator based on the first highlighted measure. The first highlighted measure may be the same as the first measure or it may be different.
- Add filters to the dashboard. These filters will be available in the Location panel to allow users to filter their results.

Company		City	DriverNumber	Region	State
All		All	All	All	All

Comparative							
Customer List							
	Customer	CustName	CustAddress	CustCity	This	Last	Sales Diff ▼ % Change
<input type="checkbox"/>	02009				2,395	0	2,395 ↑ 100.00
<input type="checkbox"/>	02004				370	0	370 ↑ 100.00
<input type="checkbox"/>	05002	GROTON HIGH JUICE	PERU ROAD	GROTON	344	0	344 ↑ 100.00
<input type="checkbox"/>	00002				210	0	210 ↑ 100.00

### 2. Save default location services dashboard as .sdm file.

After creating the default location services dashboard, save it as an .sdm file and place the file in the root dashboards web application folder (e.g., wwwroot/SDM).

# Advanced

## Location services (continued)

### 3. Modify the mobile configuration file.

You may need to create this file if you haven't already. See the topic "The mobile configuration file" for information about the required file name and location and, optionally, how to use different mobile configuration files for different datasets. Within this file, add or modify the following section to define the parameters for location services.

Example mobile configuration file (.json):

```
{
  "locConfig": {
    "geoCubeId":10,
    "geoKeyId":0,
    "availableDistances": [10, 20, 30, 40, 50, 100, 150, 200, 250, 500, 1000],
    "distanceUnit": "miles",
    "maxResults": 1000,
    "defaultDashboardName":"location dashboard.sdm",
    "fieldFormatter": "<h1>{desc1}</h1><h2>Company</h2><p>{dim0}</p><h2>Address</h2><p>{desc2}</p><h2>City</h2><p>{dim7}</p><h2>State</h2><p>{desc4}</p>"
  }
}
```

- **geoCubeId** = Enter the cube ID of geographic data cube. Refer to the configuration report available through the SIM Support dialog to identify ID numbers for dataset components.
- **geoKeyId** = Enter the ID of the geo-coded key within the geographic data cube.
- **availableDistances** = Enter distances to make available in the Distance drop-down menu.
- **distanceUnit** = Enter the desired unit of distance (either "miles" or "kilometers").
- **maxResults** = Enter the maximum number of results to display at one time.
- **defaultDashboardName** = Enter the name of the default location services dashboard (.sdm file) from which to pull data for the information displayed beside each result (see Steps 1 and 2). If the .sdm file is not located in the root web application directory, include its location relative to that directory.
- **fieldFormatter** = List the dimensions, key descriptions, and text to display underneath each result (e.g., address, city, state, etc.) enclosed within formatting parameters. Formatting parameters can include styles defined via custom branding.

To display a static text label (e.g. "Company"), enter the text itself.

To display a key description field (e.g., the specific customer name, address, etc.), enter {desc#} in which # is the number of the description for the geo-coded key based on the order listed in the configuration report where 1 is the first description for the key. For example, in the following configuration report, CustName is {desc1}.

To display a dimension field (e.g., a specific company), enter {dim#} in which # is the number of the dimension for the geo-coded key based on the order listed in the configuration report where 0 is the first dimension for the key. For example, in the following configuration report, Company is {dim0}.

# Advanced

## Location services (continued)

Example configuration report used to find ID numbers:

```
[ 0 ] 'Customer' ['Customer'] (member count: 6366)
    Cube Affinity:
        Sales, Depr, WorkOrders, AssetPlacement, CMA, ActiveCust, AR, CoordData
    Attributes:
        Key Master Fields:9
        Host Code Width:5
        Host Code Type: Numeric Zero
        CustName (30)
        CustAddress (28)
        CustCity (23)
        CustState (2)
        CustZip (5)
        CustContact (25)
        CustPhoneNumber (14)
        CustStatus (8)
    < 0 > 'Company' ['Company'] (3,3) Len: (15,11)
    < 1 > 'Region' ['Region'] (13,13) Len: (16,14)
    < 2 > 'Sales Manager' ['Sales Manager'] (6,6) Len: (25,17)
```

For example, the fieldFormatting parameter in the .json file example on the previous page would produce the following results:

```
S. NEWBURG DIST. # 245BF
Company
Company One
Address
W CHAMBERS RD
City
ELMIRA
State
NY
```

### 4. Direct users to turn on location services.

In the Settings area of the mobile app, users should turn on location services.



## About Salient

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

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

For more information, visit [www.salient.com](http://www.salient.com).

