Getting Started in 6 Easy Steps

Working with Salient Analyses

Knowledge Manager

Technology Summary
Salient Interactive Miner™

Designed to Work the Way You Think

The Salient Interactive Miner (SIM) provides the intuitive tools your team needs to analyze business questions, from high level overviews to root level causes. The following document will guide you through the basics of the SIM interface and provide you with the ability to examine your business from top to bottom.

About the Solution

The Salient solution was designed to help managers align, measure, and improve their organizations. It provides a logical, intuitive interface that allows visibility into existing databases that record daily activities. Using the details of these transactions, your business measures may now be viewed in many meaningful ways, such as trending over time, correlations between previously unrelated data, and change difference between fiscal periods. This yields powerful new insights on overall productivity, efficiency, and effectiveness of promotional and operational tactics across the organization. This information is now made usable for everyday managers to analyze and adjust their business levers accordingly.
Getting Started in 6 easy steps

Most managers have a specific business situation that they are looking to analyze when they use the SIM or they want to question deeper into reports. By following these 6 logical steps, you will quickly and easily be able to engage the appropriate analysis, and find meaningful actionable information.

1. Select the Time Frame
2. Choose the Context
3. Insert the Corresponding Metrics
4. Match an Analysis to Your Question
5. Ask Additional Questions to Find Root Cause
6. Save and Share Intelligence

Important! In addition to this Getting Started document, there is an extensive help section within the SIM. Two ways to access it are:

- Click on the help pointer and select an item in question.
- Click on the help icon to view the entire help document.
1. Select the Time Frame

Set the Time Period that relates to your question.

Click the date dialogue box.

Date options vary slightly depending on which analysis you've chosen:

For example:

- Comparative—Identify totals for one or two time periods
- Trend—Identify trends for one time period
- Comparative Time Series—Compares two trends

Setup timeframe from the top down.

Additional Concepts:

1. The "months" resolution allows a YTD option.
2. If you wish to view the current partial month vs. YAG, set your Calendar Day Modifier
   - Engage Modifiers in the toolbar and select Calendar Days in the dialogue box
3. The date range and resolution are shown in the date bar with mouse-over.
2. Choose the Context

Choose how to group results and then filter on areas of interest

Group

Corresponding groupings for each part of the business.

Filter

Double-click members of a graph or a row to filter. Data is then displayed by the next grouping you select (2nd "By") each time.

Additional Concepts:

1. **Collections** allows you to group and filter on selected dimension members.

2. Use **Key Tabs** to set 'Bys'
   - **Left click** Key Tab of the 1st 'By' dimension, then left click on the dimension
   - **Right click** Key Tab of the 2nd 'By' dimension, then right click on the dimension

3. The chosen date range and resolution are shown in the date bar.
3. Insert the Corresponding Metrics

- Right-Click to Pick from any integrated data
- Show variance, mix and other computations

Select a Pointer Tool
- Delta - shows changes difference and % Change.
- Average - shows average value per period.
- Mix - shows % versus the total.
  - After the pointer is engaged, click on a column to use it.
  - Turn off pointer after use

Additional Concepts:
1. Remove columns with the Delete pointer.
2. To insert more than one metric, use Insert Some.
3. Some metrics are calculated and you may view the formula with a mouse over. Double left click to expand to see the components.

- After the pointer is engaged, click on a column to use it.
- Turn off pointer after use
4. Match an Analysis to Your Question

Make your analysis selection based on the kind of question you have in mind. Each analysis is shown and described beginning on page 11.

Analysis Setup - select from menu.

Setup Graph Views

Step 1: Engage Graph pointer
Step 2: Select Columns to graph
Step 3: Toggle from numbers to graph

Rubber Banding
Right click and drag to display totals and averages or to list outliers depending on your chart type.

Note: If you want to customize your chart background colors, go to: Options → Preferences → Graphs

Additional Concepts:

1. Certain analyses have additional graphs available. For example:

   Comparative
   Cross-Tab

2. An alternative way to get to an analysis setup is to right click on the icon.

3. Within certain analyses, you may left or right click (in the chart outer area) for additional options.
   – The normal Trend options are seen here.
5. Ask Additional Questions to Find Root Cause

Investigate beyond charts & graphs into actionable details.

**Survey** data for Categorical Outliers.
**Expose** Underlying Value Drivers.
**Identify** Root Cause Behaviors.
**Refine, Adjust, and Execute** Based on Findings.

*View the results within Salient and repeat the process.*

Sample "Investigate" Use Case

**Step 1:** This example view identifies customer performance based on price and volume.

**Step 2:** Most of the customers buy along the familiar curve of high quantity, lower price and low quantity, high price. Some; however, do not...

**Step 3:** Who are they? Rubberband to get a list of the outliers, the price they get by volume sold.

*Who sold to these accounts? Right click to insert the Sales Reps' names.*

**Step 4:** A manager can now contact the Sales Rep to see why these customers are getting such aggressive pricing given their volume.

**Step 5:** The Sales Rep will make the necessary adjustments and the manager can keep track of results with the Salient solution.
6. Save & Share Intelligence

Bookmarking, exporting to different file formats, copying to clipboard, and printing are all methods that you can use to save and share intelligence.

### Add Bookmarks

- Price vs Volume - Scatter over Time
- Price Drivers by Brand
- Visual Examples
- G_New Product - Penetration
- G_Avg Margin per Drop less than 20.00
- G_New Product - Cannibalization
- G_New Product Results
- New Diet Brand - Trend and Exception
- Mix Management
- New Product Penetration

### File → Save As

**Copy to Clipboard**

**Bookmarks**
- Authorized users may save Global bookmarks that everyone may see.
- Date options can help you automate daily and weekly updating of saved views.
- Supermark bookmarks save multiple windows in a dashboard style view.

### After a bookmark is created, a description and explanation of its use can be saved in the Bookmark Info panel of Knowledge Manager.

- A brief description of the captured issue and explanation of what is displayed
- Any additional resources (promotional flyers, brochures, technical documents, etc) can be linked for instant access
- Comments help document when and why the bookmark was created plus suggestions for improving or changing the issue presented.

**Contact Salient for help with initial install. More on page 18**
Working with Salient Analyses

Frequently Used Terms

**Keys tabs** – The primary groups of people, places and things involved in your organization’s activities. For example: Customer, Product, Store, Vendor…

**Dimensions / Attributes** – Attributes that describe and classify groupings of list members. Each key typically has several attributes that describe its members such as the following common Product attributes: Brand, Category, Department…

**Members** – The individual records from lists such as: ‘Customer ABC’, ‘Product ABC’ and ‘Supplier ABC’, or ‘Dimension Members’ as shown:

**Visual Data Mining (VDM)** – the process of visually identifying meaningful information.

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General Visual Data Mining Capabilities

- change chart type
- axis setup
- dynamic scale
- measures setup

- change metrics

- list sales that week
- compare sales that week

- see totals & averages
**Comparative View**

Displays summary performance

- **Attribute** – one or more...
  - Customer, Division, etc.
- **Time** – days, weeks, months, years, etc.
- **Data Measure** – one or more...
  - Quantity, Revenue, Cost, etc.

Example:
- view volume quantity & gross revenue for current year vs. prior year vs. prior year

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**Comparative Time Series**

Displays performance trends for multiple time periods

- **Attribute** – one...
  - East Division
- **Time** – days, weeks, months, years, etc.
- **Data Measure** – one or more...
  - Quantity, Revenue, Cost, etc.

Example:
- view units, gross revenue, and cost of goods by month for current year vs. prior year.

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**Crosstab**

Displays a summary performance matrix

- **Attributes** – any two attributes...
  - by Region by Store
- **Time** – days, weeks, months, years, etc.
- **Data Measure** – one or two

Example:
- view quantity sold by all product packages by all brands with totals and averages for both.
**Multi-Comparative**

Displays summary performance for user-defined periods of time

- **Attribute** – one or more...
  
  Brands, Products, etc.

- **Time** – one or more...days, weeks, months, user-defined, etc...

- **Data Measures** – one or more...
  
  Sales, Margin, Cost of Goods Sold

Example:

- **View sales summary** (month-to-date, year-to-date) by one or more data measures.

**Normal Trend**

Displays non-comparative performance trends for multiple time periods

- **Attribute** – one...Eastern Region

- **Time** – by one or more measures...
  
  net price, quantity sold

- **Data Measure** – one or more...
  
  Quantity, Net Price, Unit Margin, etc.

Example:

- **Volume & margin monthly trends for a store by a specific product group.**

**Stack by Volume Trend**

Displays performance SHARE trends

- **Attribute** – one (all members)...
  
  all stores within a region

- **Time** – days, weeks, months, years, etc.

- **Data Measure** – one measure at a time
  
  (Net Revenue shown here)

Example:

- **How new brand impacts sales of other brands within category**

- **How new store impacts sales of other stores within the same area**
Stack by Share of Mix Trend

Displays performance MIX trends
- **Attribute** – one (all members)… all stores within a region
- **Time** – days, weeks, months, years, etc.
- **Data Measure** – one measure(% of total) at a time (units shown here)

Example:
- how has a new brand cannibalized an existing brand

Exception

Displays PASS/FAIL information based on user defined criteria/conditions
- **Attributes** – one or more…Brand, Package, etc.
- **Time** – one or two
- **Date Measure** – one or more… Pass/Fail criteria can be set for one or more data measures

Example:
- customer meeting specific margin/profit criteria
- product buy/no buy activity

Exception Time Series

Displays PASS/FAIL key list trend information
- **Attributes** – one or more…Brand, Package, etc.
- **Time** – one or two
- **Date Measure** – one or more… Pass/Fail criteria can be set for one or more data measures

Example:
- customer activity trends
- product penetration trends
- product lifecycle
**Range**

Displays a matrix of any one measure

- **Attribute** – one (all members)... all sizes of a specific product.
- **Time** – days, weeks, months, etc.
- **Data Measure** – one...Quantity, Revenue, Cost, etc

Example:
- determine optimal price point for specific products

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**Scattergram**

Displays a matrix of any two measures in attempt to find key member outliers

- **Attribute** – one...Region, Division, etc - specific customers, products, etc.
- **Time** – days, weeks, months, etc.
- **Data Measure** – two...Quantity and Margin, Net Price and Unit Margin

Example:
- perform price vs. quantity relationship comparison for all customers who purchased a specific product.

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**Bubble Chart**

Displays a matrix of three measures and how they correlate

- **Attribute** – one or two...Category, Brand, Division
- **Time** – days, weeks, months, etc.
- **Data Measure** – three...Quantity, Revenue, Margin

Example:
- Sales by price-point plotted by margin percent
### P&L Format
Displays a matrix of measures and their change vs any two time periods or vs. budget data
- **Attribute** – one (specific member)...store, salesperson, product
- **Time** – days, weeks, months, years, etc.
- **Data Measure** – multiple

**Example:**
- Chain store P&L activity detail

### Average Per Member
Displays PASS/FAIL and average per period performance of key members who pass or qualify based on the criteria
- **Attribute** – one...all sizes of a specific product
- **Time** – one or two periods of time
- **Date Measure** – average for one measure based on one or more performance criteria

**Example:**
- Average sales per store of stores that were open during the same time period last year

### Average Per Member Time Series
Displays PASS/FAIL & average performance trend information for key members
- **Attribute** – one...product brand
- **Time** – days, weeks, months in a series
- **Data Measure** – based on one or more performance criteria
Time in Place

Displays changing conditions over time

- **Attribute** – one by any attribute member...
  specific vending machine
- **Time** – days, weeks, months, etc.

Example:

- **asset placement history by customer**
  (which assets are in place over time & historical status)
- **by asset** (which customers over time & historical status)

Geographic

Provides GEOGRAPHICAL view of each key member for a specific attribute.

- **Attribute** – one... Western region
- **Time** – days, weeks, months, etc.
- **Data Measure** – one or two...
  Quantity, Margin, etc.

Example:

- plot on a map the impact of how frequency of delivery could save distribution cost

Line Item

Displays Line Item details attached to any one key member*

- **Attribute** – one by any attribute member...
  specific product within a category
- **Time** – days, weeks, months, etc.
- **Date Measure** – one or more

Example:

- by customer (product purchases by line item) for specific period of time

*must first be drilled into a key member...
Example: specific customer and/or product
Mix-Time
Displays comparable SHARE performance

- **Attribute** – one by all members...
  - all products within a category.
- **Time** – days, weeks, months... for any two
- **Data Measure** – one or more

Example:
- change in region contribution to total sales & volume distribution

Mix-Data
Displays SHARE performance

- **Attribute** – one by all members...
  - all customer market segments
- **Time** – one period of time
- **Data Measure** – one or more

Example:
- Regional contributions of total sales
- Margin/Profit contribution by store within a region/area
Knowledge Manager enables users to organize thoughts or "soft knowledge" for collaboration.

Each section of the panels contains text, file or object entry tools.

The General Info panel has three tabs:
- General: adds global information available to most users
- Index/Search: adds searchable information such as a glossary of terms
- About me: adds personal information on authorized authors of Knowledge Manager entries

The Bookmark Info panel allows users who create bookmarks whether global or private can write a description and purpose for the bookmark.

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

The Member Info panel allows you to connect media or non-media information to specific customers.

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.
Salient Technology Summary

Front End Management Applications

**Desktop Client**

Salient Interactive Miner™
*The only* self-service, facts-on-demand visual data miner.

**Web Client**

Salient Dashboards™
*The only* tool that enables independent creation and exploration beyond ordinary dashboard boundaries.

The Salient Platform

*The only* super-scalable in-memory intelligence processing & visualization technology

Easy Integration

*The only* integration tool that directly merges structured business planning with technical design

Works with Your Existing Infrastructure

Any Process – Sales, Finance, Distribution, Supply Chain
Any Data Source – SAP, Oracle, Any ERP, DW, or POS, MS Dynamics, Excel, Access...
"If people do not see the process, they can not improve it."

W. Edwards Deming