

December 22, 2016

# Salient Interactive Miner™ 6.x Training Guide

Introduction & Technology  
Summary

Getting Started in 6 Easy  
Steps

Practical Applications



# Salient Continuous Improvement Suite

Data Mapping, Acquisition,  
Transformation and Loading:



**Salient ETL™**  
Integration tool for database mapping

Choice of alternative ETL

Intelligence Processing:



**Analytical Data Mart**  
Capable of scaling up to billions of records.

Desktop UIs:



**Analytical Workstation**  
Advanced visual data mining application



**Knowledge Manager**  
Collaboration hub for knowledge sharing.

Optional Add-ons:



**Geo Analytics**  
Analyze geospatial data in Analytical Workstation



**Salient360™**  
Excel plugin to connect to Analytical Data Mart

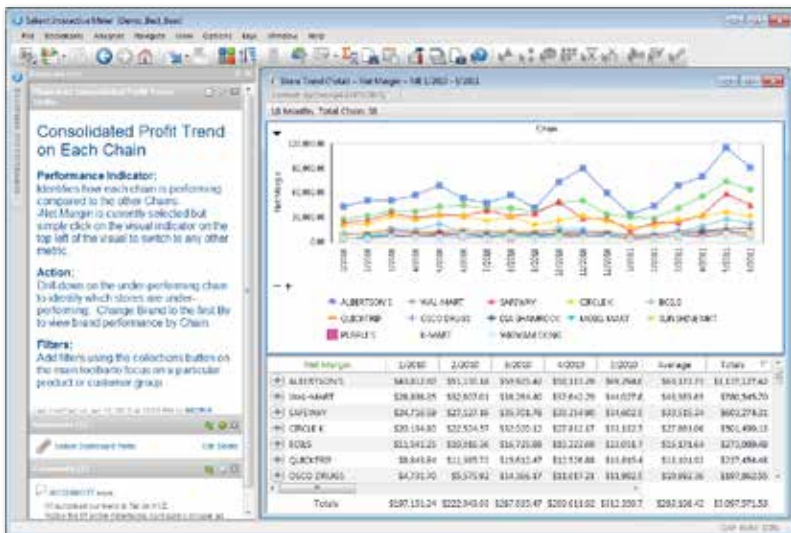
N-Tier UIs:



**Salient Dashboards™**  
Analytics on-the-go for quick consumption

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- Self-Service for Business Users
- Drill-Down Logic Out-of-Box
- No Query Writing

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.

# Getting Started: The SIM Workspace

**Salient Interactive Miner [Demo\_Bottling]**

File Bookmarks Analyses Navigate View Options Keys Window Help

**Analysis Shortcuts**

**Bookmark and Storyboards Panel**

Bookmarks and Storyboards

- Bookmarks
- Global
  - Demo Starting Point
  - Inventory Management
  - Asset Management
  - MRO
  - Finance
  - Margin Variance
  - Forecasting
  - Salient Pre-Sets
  - GEO
  - APM
  - Salient Portfolio Management
- Customer Performance
  - Chain Account Mgmt
  - Cost to Serve
- Product Performance
  - Supplier Performance

**Date Selector**

Comp ~ ME 1/2011 vs. YAG

Context: Sales

Regional Chains >

By:Cust Name **70466 S. NEWBURG DIST. # 715** \ Key Account

Modifiers: Calendar Days Filters:

**Metrics**

	Units		%		Mix (T)	Net Pr
	This	Last	Diff	% Chg		
+ 70466 S. NEWBURG DIST. # 715	2,774	3,948	-1,174	-29.74	7.1	\$7.63
+ 70481 S. NEWBURG DIST. # 155SS	2,721	2,762	-41	-1.48	6.9	\$7.69
+ 70208 OBECK INC.#5901	2,291	2,396	-105	-4.38	5.8	\$7.27
+ 70469 S. NEWBURG DIST # 935	2,095	2,934	-839	-28.60	5.3	\$7.83
+ 70215 OBECK INC. # 831	2,019	4,790	-2,771	-57.85	5.1	\$7.64
+ 11904 VILLAGE NORTH # 07	2,001	5,016	-3,015	-60.11	5.1	\$7.87
+ 11901 VILLAGE NORTH CG/# 15	1,762	6,188	-4,426	-71.53	4.5	\$8.16

## Getting Started in 6 easy steps

- 1 Select the Time Frame
- 2 Choose the Context
- 3 Match an Analysis to Your Question
- 4 Insert the Corresponding Metrics
- 5 Save and Share Intelligence
- 6 Drill Down to Underlying Detail

Most managers have a specific business situation that they want to analyze or question deeper when they use SIM. By following these 6 logical steps, you will quickly and easily be able to engage the appropriate analysis, and find meaningful, actionable information. Then, save and share logical bookmarks with your colleagues.

**Important!** In addition to this Getting Started document, there is an extensive help section within 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

Set up your own customized time-frame to analyze.

- Set the resolution
- Filter on certain days (if applicable)
- Choose the time frame ("This" date range)
- Select previous period to compare against ("Last" date range). Compare to an equivalent date range one year earlier (YAG) or any other dates (Advanced).

System administrator configures custom settings (such as calendar periods)

Options may be disabled based on the current mode of analysis. Change the analysis mode to enable relevant settings if desired.

## Incomplete month options

Select an option for incomplete months:  
On View menu, select Modifiers. In MTD/YTD Calculation Method section, select an option:

Tip: If these options are greyed out, make sure you have the current month selected on the timeline.

**Full Month**  
Incomplete month vs. complete month last year—"gap" or "goal" perspective. For example, January 1–15 this year vs. full month of January last year.

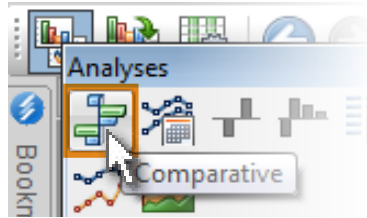
**Calendar Days**  
Compares same number of days this year and last — most precise "gain/loss" vs last. For example, January 1–15 this year vs. January 1–15 last year.

**Weighted Days**  
Weighted days are customized factors that must be set up by your system administrator.

# 2 Choose the Context

Select how to group the data.

Let's start with the Comparative analysis for this lesson.



Use the Numbers/Graph Toggle if you are not already in a grid view

### Pick your sub-groupings:

The By (1st By) shown below controls the groupings shown at the highest level. The 2nd By controls the sub-groupings that one would see next when expanding an item or drilling down. Additional levels of sub-groupings are available as you continue to expand, using the plus symbol on each row.

1<sup>st</sup> By

Next By (2<sup>nd</sup> By \ 3<sup>rd</sup> By \ 4<sup>th</sup> By \ 5<sup>th</sup> By

Comp ~ ME1/2011 vs. YAG								
Context: Sales								
Add to path: By:Region NorthWest Area \ Sales Rep \ Key Account \ Prod Name								
Modifiers: Calendar Days Filters:								
	Units					Net Price		
	This	Last	Diff	% Chg	Mix (T)	This	Diff	
+	SouthEast Area	45,246	66,844	-21,598	-32.31	26.8	\$9.68	\$ .49
+	SouthWest Area	40,085	56,164	-16,079	-28.63	23.8	\$9.36	\$ .48
+	East Area	36,941	50,624	-13,683	-27.03	21.9	\$8.63	\$ .27
-	NorthWest Area	32,800	52,182	-19,382	-37.14	19.4	\$9.98	\$1.01
+	Johnson, Louise	14,302	22,262	-7,960	-35.76	43.6	\$9.65	\$ .74
+	Markey, Ciro	12,279	17,140	-4,861	-28.36	37.4	\$10.20	\$ .80
-	Allen, Chris	3,354	9,540	-6,186	-64.84	10.2	\$8.79	\$1.53
+	Village North	1,762	6,188	-4,426	-71.53	52.5	\$8.16	\$1.54
+	Miniers & Foodmart	1,521	2,832	-1,311	-46.29	45.3	\$9.63	\$ .93
+	Faire Dist-North	71	520	-449	-86.35	2.1	\$6.72	(\$ .53)

Tip: Right-click here to access options to hide "key tabs".

If key tabs are on

(Note: this was for version 4.8 and earlier)

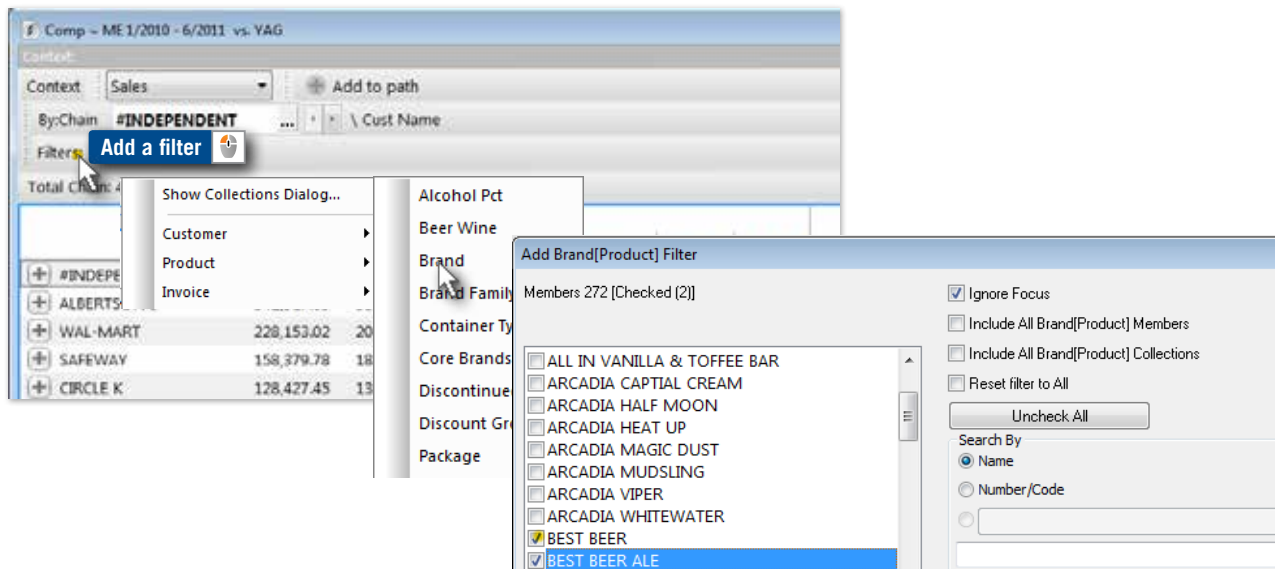
### To change the groupings and sub-groupings.

# 2 Choose the Context (continued)

Choose the part of the business.

Narrow down on a subset of the data by adding a filter, drilling down, or using collections.

## Add filter:



The resulting view adds a filter for the selected item(s) without changing the By dimension or the drill path. You can repeat to narrow down on the exact information needed.

By:Chain #INDEPENDENT ... \ Cust Name

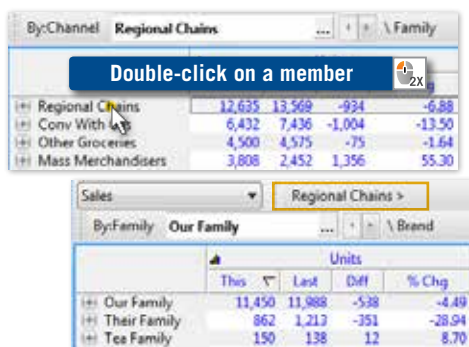
Filters: Brand[Product]:Temp\_Brand[Product]

Total Chain: 40

	This	Last	Diff	% Chg
#INDEPENDENT	190,951.87	208,297.05	-17,345.18	-8.33
ALBERTSON'S	43,244.83	42,527.20	717.63	1.69
WAL-MART	35,607.25	31,719.08	3,888.17	12.26

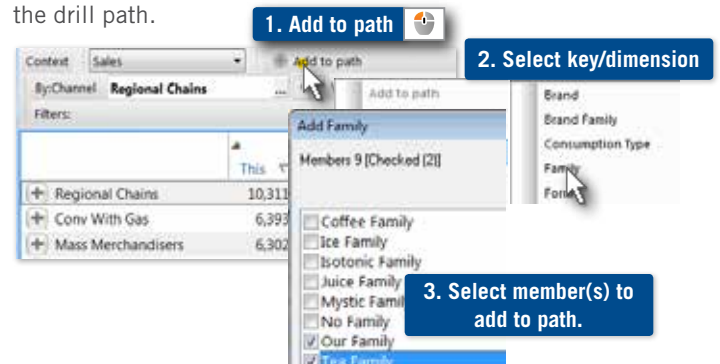
## Drill down:

**Option 1:** Drill down on a member of the current By.




The "drilled" view shows data for the selected member grouped according to what was previously the 2nd By.

**Option 2:** Add one or more members of any dimension to the drill path.

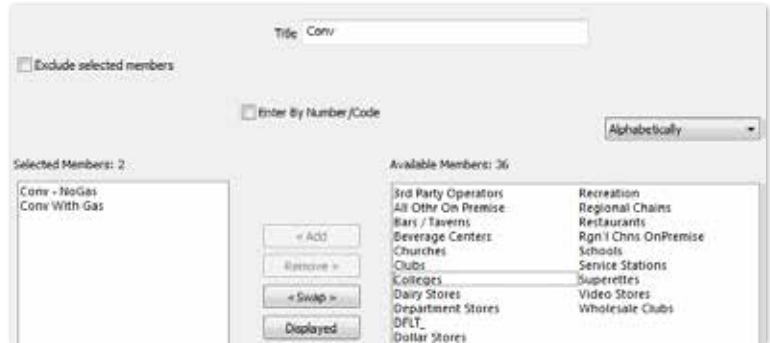
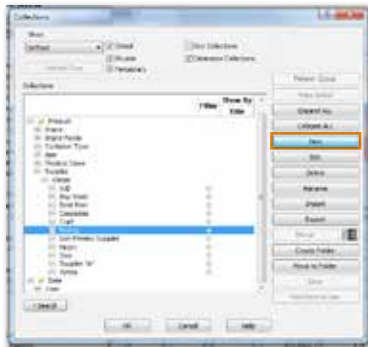


# 2 Choose the Context (continued)

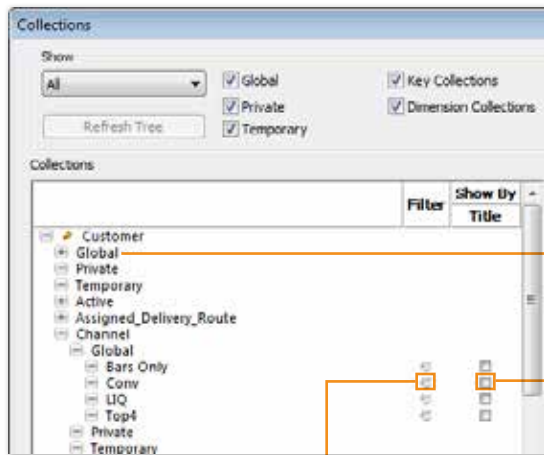
**Collections:** How to create your own filter (also see “Of These” on page 47)

Select the  button, then navigate the tree structure to the area you want to group (e.g. Group of brands/suppliers/customers/etc).

Click New.



Turn a collection on.



**Tip:** Share collections with other users by making them global.


**Filter option**—filters out data for all other members.

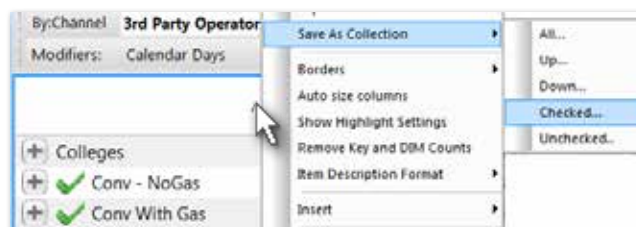
By:Channel Conv With Gas						
Filters: Channel:G_Conv						
	Units				Net Margin	
	This	Last	Diff	% Chg	This	Last
Conv With Gas	29,431	30,153	-722	-2.39	\$137,592	\$156,184
Conv - NoGas	4,662	4,940	-278	-5.63	\$20,905	\$25,856

**Show By Title option**—compares collection as a group to other collections or the total.

By:Channel G_S-Conv						
	Units				Net Margin	
	This	Last	Diff	% Chg	This	Last
G_Conv	34,093	35,093	-1,000	-2.85	\$158,098	\$182,040
Totals (Channel)	270,905	252,847	18,058	7.14	\$859,454	\$877,425

**Alternative Method**

Use the check pointer tool () to check the desired members and then click the options arrow and choose Save as Collection > Checked.

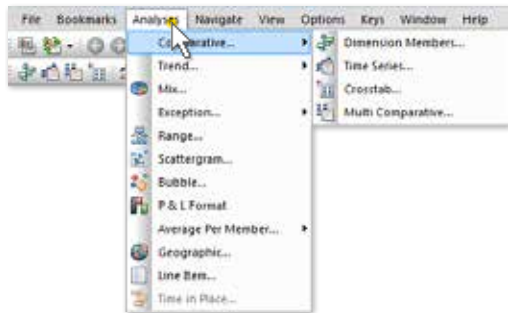




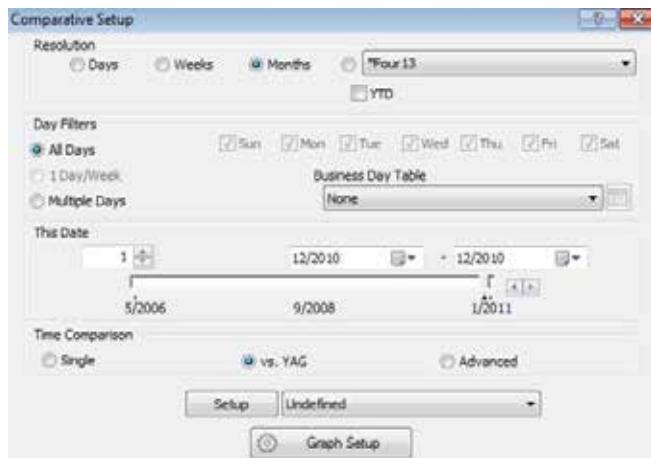
# 3 Pick an Analysis

Please refer to the examples section to identify which analysis to pick. This page will provide some related tips.

**Analysis Setup**—select from menu.



The menu option opens a setup dialog for the analysis.



**Numbers/graphs**

Switch between numbers and graphs.

Select a graph format.

For example:

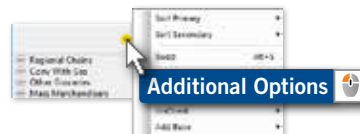
Comparative

Crosstab

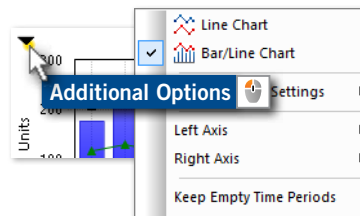


**To see options for each analysis type**

To see additional options in numbers views, place your cursor over the upper-left corner and click the arrow.



To see additional options in graphs, click the arrow in the upper-left corner.



## Additional Concept:

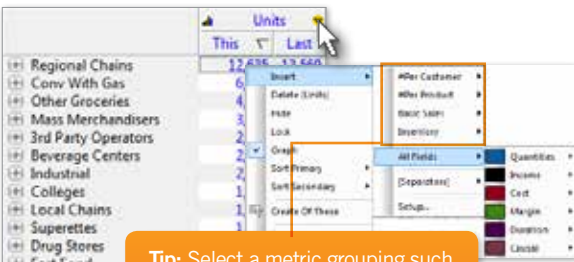
An alternative way to get to an analysis setup is to right click on the icon.



# 4 Insert Metrics

## Insert metrics (revenu, margin, units sold, etc.) in numbers views:

Mouse-over and click the arrow to pick from any integrated data or right-click a heading column.



**Tip:** Select a metric grouping such as Basic Sales and then the metric if your company has set logical groupings of metrics. Otherwise, you can select from a submenu of data categories that include Quantities, Income, Cost, etc.

Show variance, mix and other computations

Select a Pointer Tool

- Delta**—shows changes difference and % Change.
- Average**—shows average value per period.
- Mix**—shows mix % versus the total.

- After the pointer is engaged, click on a column to use it.
- Turn off pointer after use


		Sales							
		This	Last						
Obeck #37		\$38,684	\$20,708						
Obeck #41		\$21,075	\$14,969						
Obeck #54		\$51,586	\$45,645						
Village North #12		\$24,892	\$19,007	This	Mix (%)	Last	Diff	%	Chg
Village North #33		\$20,461	\$14,761	\$51,586	8.5	\$45,645	\$5,941	13.02	
Obeck #45		\$26,916	\$21,354	North #12	\$24,892	4.1	\$19,007	\$5,885	30.96
Village North #17		\$21,863	\$18,405	North #33	\$20,461	3.4	\$14,761	\$5,700	38.62
Village North #14		\$44,161	\$38,841	#45	\$26,916	4.5	\$21,354	\$5,561	26.07
Obeck #15		\$17,442	\$12,547	North #17	\$23,865	4.0	\$18,405	\$5,458	29.65
Village North #99		\$50,864	\$46,846	North #14	\$44,161	7.3	\$38,841	\$5,321	13.70
				#15	\$17,442	2.0	\$12,547	\$4,895	39.01
				Village North #90	\$20,864	6.4	\$46,846	\$4,019	8.58
				Obeck #57	\$27,978	4.6	\$23,965	\$3,993	16.69
				Obeck #00	\$38,288	5.5	\$36,347	\$1,941	5.34

before delta

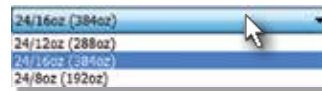
after delta

### 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**.  

4. Configure highlight settings for metrics with: View → Highlight Settings on the menu.

5. If set up by the Administrator, “Modifiers” allow you to change equivalent numerical views.

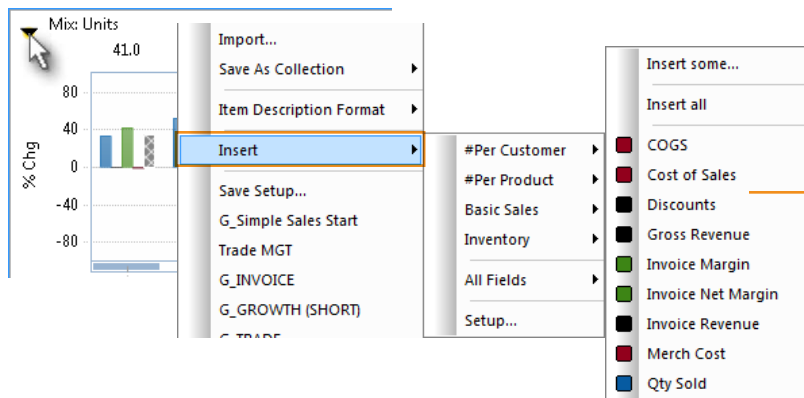


6. **Unit/Total** toggles between per unit and total values.
7. In some analyses (Stacked Trend, Multi Comparative-2, Geographic, etc.), click the Change button to change the data field.
8. In key lists, you can also insert properties (name, address, etc.) and dimensions (channel, sales rep, etc.). See Advanced Concepts section.

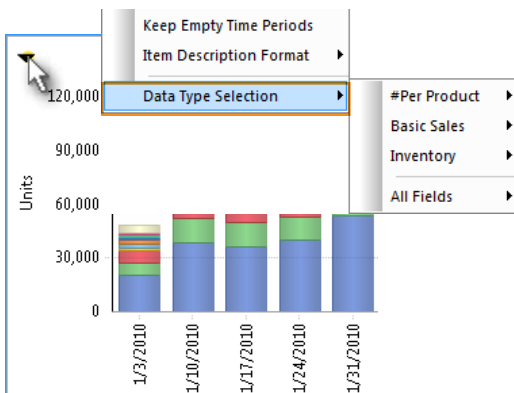
## 4 Insert Metrics (continued)

**Select metrics in graphs:** The method for selecting metrics in graphs depends on the analysis type and graph format.

**Options menu:** In most graphs, you can click the arrow in the upper-left corner to open a menu with options for inserting or selecting the metric.



**Tip:** If you do not see the metric listed, it could already be part of the numbers view but turned off for graphs. Use the following procedure (Mix and Comparative Time) to mark fields for graphs.



### Mix:

Use the following instructions to select data in Mix graphs.

 **Step 1:** Switch to numbers.

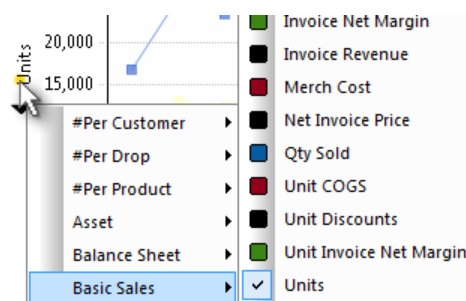
 **Step 1:** Engage Graph pointer



**Step 2:** Select Columns to graph (Add columns if necessary using instructions on previous page.)

 **Step 3:** Switch back to graph.

**Graph label:** In many graphs, you can click the graph axis label to change or insert the metric.



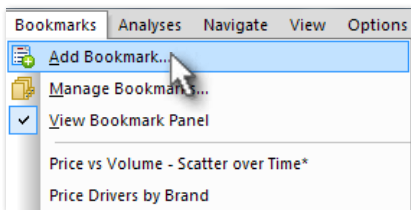
# 5 Save & Share Intelligence

Bookmarking, exporting, copying to clipboard, emailing, and printing are all methods that you can use to save and share intelligence. Also see “Storyboarding” and “Macros” in Advanced Concepts.

## Bookmarks

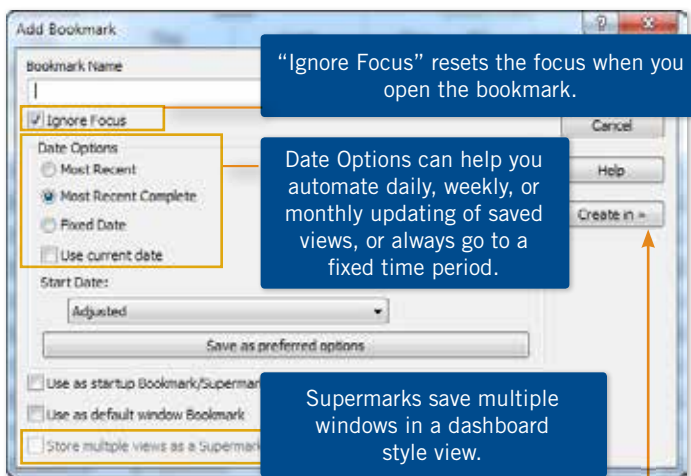
### Create a bookmark

**Step 1:** Configure the view that you want to save (choose analysis, choose context, set timeframe, etc.).

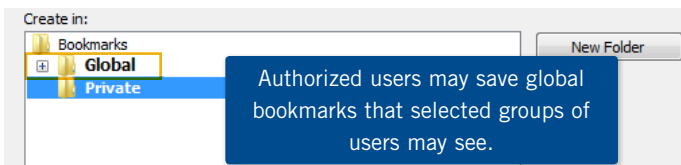


**Step 2:** Add bookmark:

Select Bookmarks → Add Bookmark.

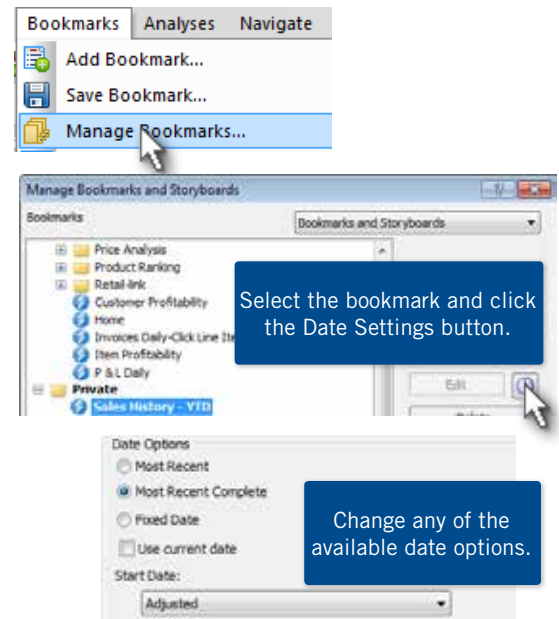


Click “Create in” to select a folder where you want to save the bookmark.



### Edit a bookmark

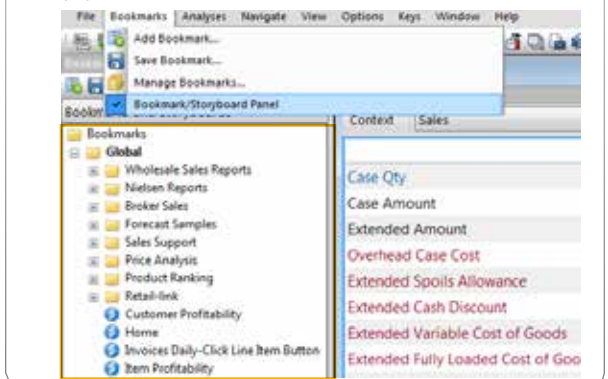
You can change the date options for a bookmark at any time.



For any other bookmark edits (context, analysis type, format, etc.), you must open the original bookmark, make changes, and then resave the bookmark using the procedure to the left.

### Bookmarks panel:

The bookmarks panel makes it easy to open and manage bookmarks. You can turn this panel on in the Bookmarks menu.

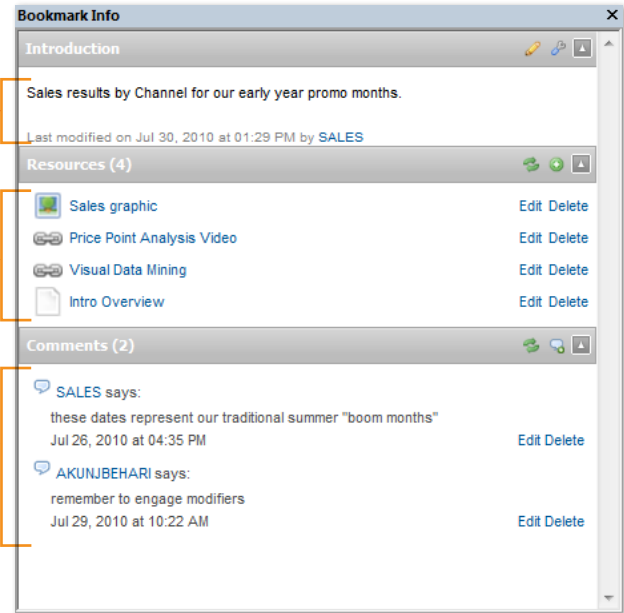


# 5 Save & Share Intelligence (continued)

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

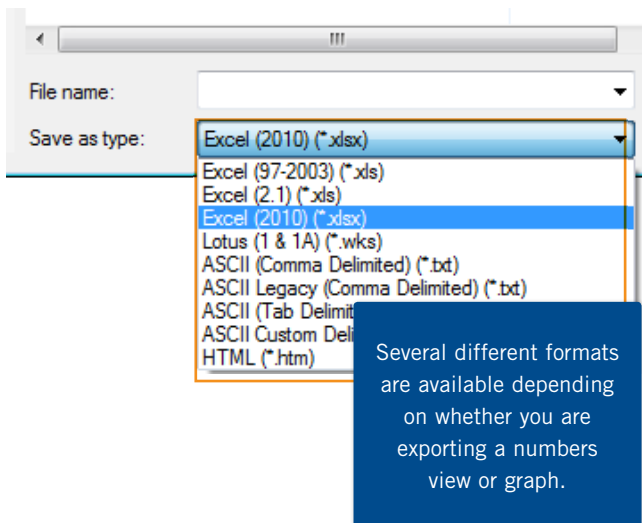
- A brief description of the captured issue and explanation of what is displayed.
- Any additional resources (promotional flyers, brochures, technical documents, etc) can be linked for instant access.
- Comments help document when and why the bookmark was created plus suggestions for improving or changing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

**Contact Salient for help with initial install.**



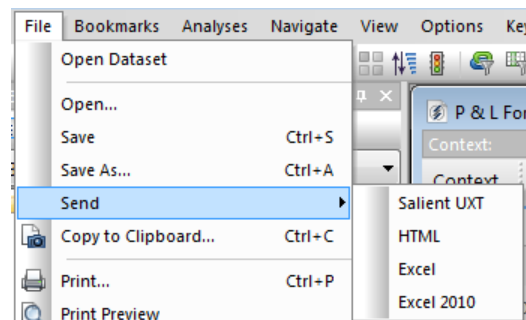
## Export

File → Save As



## Email

File → Send

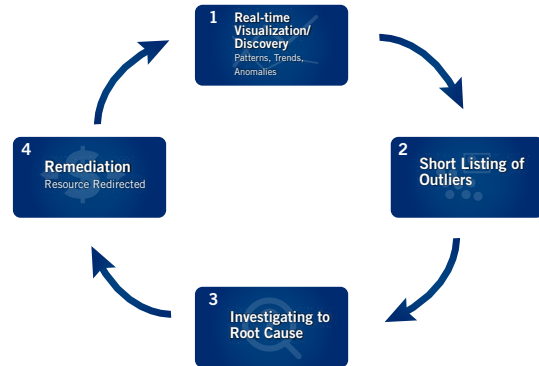


# 6 Drill Down to Underlying Detail

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, including the price they get by volume sold.

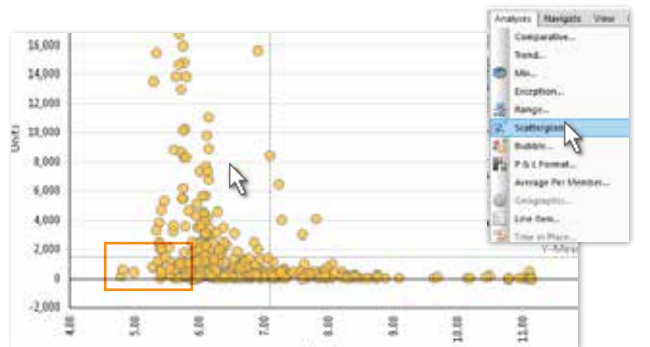
*Who sold to these accounts?*

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

**Step 5:** Drill in on a single customer and view results over time. Correlate changes in price with volume and margin.

**Step 6:** Compare volume, price and margins before, during, and after a discount event to improve promotional performance.

With the information in hand, the sales rep can make the necessary adjustments and keep track of results with the Salient solution.



Rank	CustName	Net Price	Units	SalesRep
1	STATLER HOTEL / TERRECE REST	\$5.48	2,302	Saxton, Tom
2	SKERPON'S BEVERAGE	\$5.64	2,041	Pence, Thomas
3	PICNIC PIZZA	\$5.18	1,439	TS-Ferkel
4	SCHUELLKOLP...	\$4.41	1,222	Office-Lasoski
5	CARMELLA'S I/A...	\$4.18	872	Pence, Thomas
6	HARDINGE DINN...	\$4.26	745	Office-Ferkel
7	MOAKLEY HOUSE	\$5.76	692	Office-Lasoski
8	COHOCTON SPORTS BOOSTER'S CLUB	\$5.56	658	Johnson, Louise



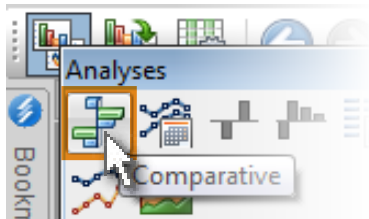
Bookmark Building Segmentation and Measurement Basics

# MTD or YTD vs YAG

Identify gains & losses for MTD or YTD vs. Year Ago (YAG) or budget comparing multiple metrics and any business segment sub-groupings.

MTD or YTD Comparisons	Multiple Metrics			
	MTD or YTD	vs YAG	Mix/of Total	vs Budget/Forecast
Segments with sub-grouping				

1. Analysis: choose the “Comparative”



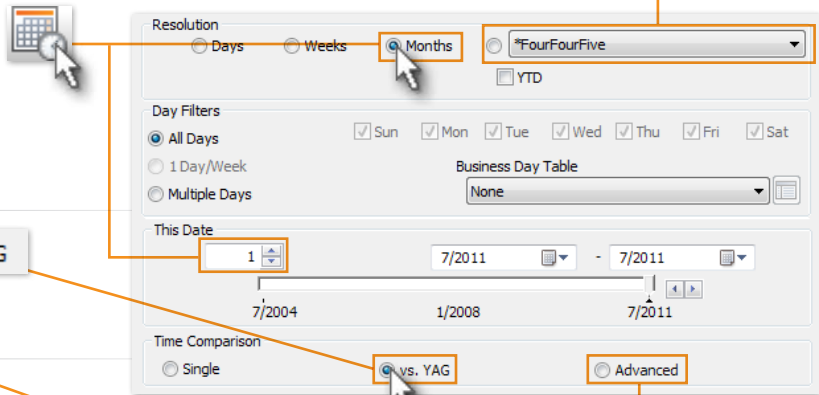
Use the Numbers/Graph Toggle if you are not already in a grid view

## Period Tables

To use a period table, choose from the drop down shown here in the date dialogue box.

2. Time-frame: Select most recent month or period

(or select the current month if you have forecasts or “future time periods” in your data-set.)



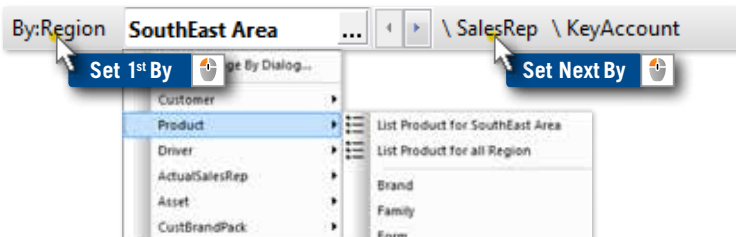
Select comparison period

Compare to YAG or other prior month.

Select an option for incomplete months: See “Incomplete month options.”

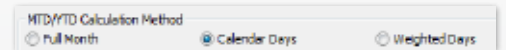
3. Context: Select any sub-groupings of business segments

\*Optionally apply any filters. See the page called “Choose the Context”



## Incomplete month options

Select an option for incomplete months: View > Modifiers > MTD/YTD Calculation Method



Incomplete month vs complete month last year—“gap” or “goal” perspective

Compares same number of days this year and last year—most precise “gain/loss” vs last

**4. Metrics: Insert and / or delete**



Hover on any column heading then right click, or click on the arrow that appears on hover and choose “Insert” to add metrics.

**Budget/forecast:** same as Inserting metrics above

**5. Add variance, mix, budgets:**

Activate the pointer tool shown by clicking once on the icon and then on the heading to perform the math. Then, click the same icon to deselect.

**% Change and Difference**



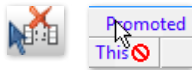
**Percent of total (mix)**

Same steps as above to activate pointer



**Delete**

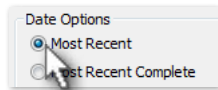
Click the “delete” cursor tool button once to activate then click on either headings or sub-headings to remove columns.



**6. Save bookmark:**

**Bookmarks > Add Bookmark**

Select Most Recent to automatically update



**For YTD**



**YTD vs YAG**

Use the same steps listed on the left except:

- Check the YTD box when selecting the time-frame
- For fiscal YTD or YTD using your period table, choose the option to the right, below.



# Date Comparison Notes:

Our suggested method provides the most automated way to update MTD/YTD bookmarks over time. If you require a comparison of exactly the same number of “days with sales,” other options are available such as:

- Add a “count” field to identify the number of days with sales for each period to see if there was one or two more business days this month compared to YAG.
- The date dialog box provides a “days” resolution that lets you pick any start and end date with an Advanced time comparison; however, it must be updated each time you view the bookmark.



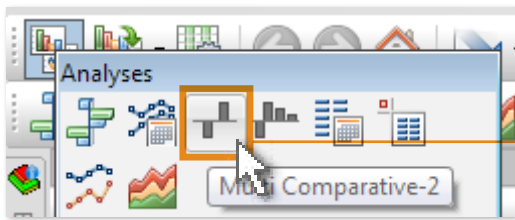
Bookmark Building 101 Segmentation and Measurement Basics

# MTD and YTD vs YAG (1 Metric)

Identify gains & losses for both MTD and YTD comparing one measure and any business segment sub-grouping.

Any 1 Metric	Month to Date		Year to Date	
	This	Last	Diff	%Chg
Segments w/ sub-grouping				
_____				
_____				
_____				
_____				

1. Analysis: Choose the Multi Comparative-2



Select the Numbers View

If this button is greyed out you may need to turn off multi-analysis by clicking this icon

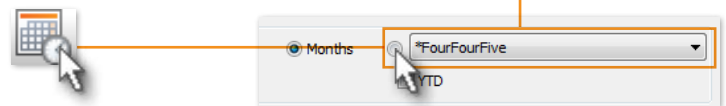


**Period Tables**

To use a period table, choose from the drop down shown here in the date dialogue box.

2. Time-frame: Select most recent month

Select an option for incomplete months: See "Incomplete month options."

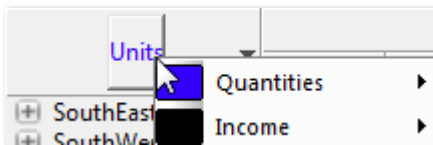


3. Context: Select any sub-groupings of business segments

\*Optionally apply any filters. See the section called "Choose the Context"



4. Select Metric: Click upper-left box

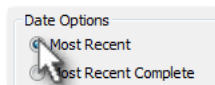


5. Variance, Mix, Budgets:

This preset does not support mix or budgets. All columns are "pre-set" for ease of use. See the next lesson to customize columns.

6. Save Bookmark:

Bookmarks > Add Bookmark  
Select Most Recent



If you choose "Most Recent Complete", the numbers will be based on Last Month End.

**Incomplete month options**

Select an option for incomplete months:  
View > Modifiers > MTD/YTD Calculation Method

MTD/YTD Calculation Method

Full Month     Calendar Days     Weighted Days

↑

Incomplete month vs complete month last year—"gap" or "goal" perspective

↑

Compares same number of days this year and last year—most precise "gain/loss" vs last

## Bookmark Building 101 Segmentation and Measurement Basics

# MTD and YTD vs YAG (Multiple Metrics)

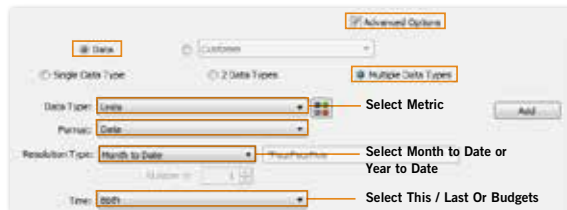
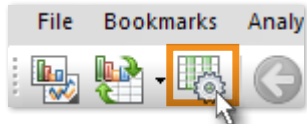
Identify Gains & losses for both MTD and YTD comparing multiple metrics and any business segment sub-grouping.

Any # Metrics	Month to Date		Year to Date	
	Any Number of Metrics		Any Number of Metrics	
Segments w/ Subgrouping				
_____				
_____				
_____				
_____				

- 1. Analysis:**  
Analyses > Multi Comparative



- 2. Configure Time-frame by Metric:**  
In Multi Comparative Setup, click Setup. Click New.

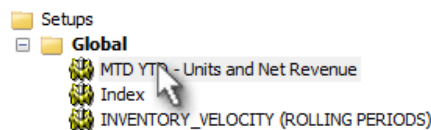


Select options as shown. Click Add to add columns Repeat for additional metrics, YTD and budgets.

- 3. Variance, Mix, Budgets**  
Repeat for additional metrics, YTD, and budgets.  
In preview pane, use pointer tools to add delta and/ or mix.

Month to Date		Year to Date		Month to Date		Year to Date	
Units		Units		Net Revenue		Net Revenue	
This	Last	This	Last	This	Last	This	Last

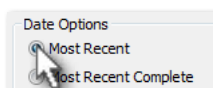
In Preview pane, click and drag to move columns.



- 4. Context:** Select any sub-groupings of business segments  
\*Optionally apply any filters. See the section called "Choose the Context"

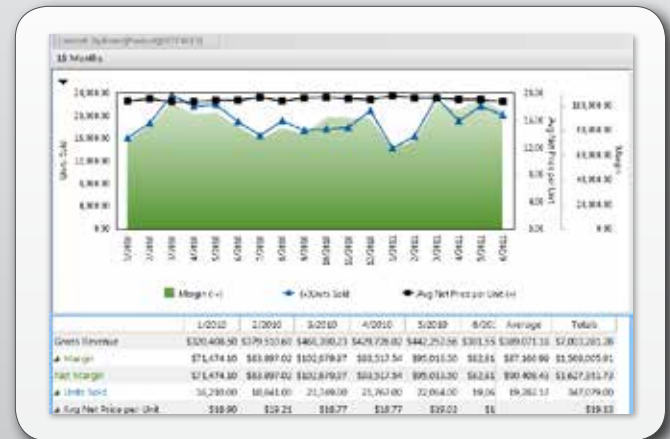
By Superior	ROCHESTER	This	Last	Customer
		213,840.30	225,164.	
	#INDEPENDENT	108,559.08	115,258.	

- 5. Save bookmark:**  
Bookmarks > Add Bookmark  
Select Most Recent

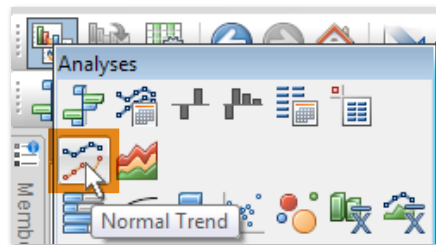


Tracking Performance Over Time, Trend Analysis

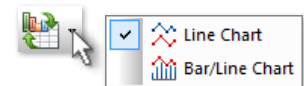
# Trend any one “thing” with multiple metrics, “cause and effect”



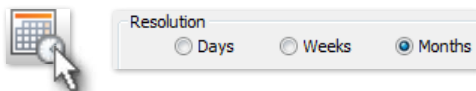
1. Analysis:  
Analysis > Normal Trend



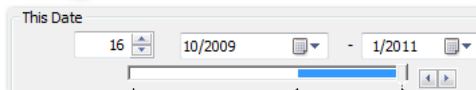
Select line graph.



2. Time-frame: Select units of time.



Select how many and when.



3. Context:

Select segments.



Select focus.

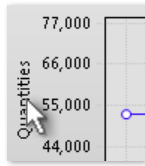
The Normal Trend shows data for the item in focus. Options include:

- Single item  Recreation  Regional Chains  Restaurants
- Total or average of all items  All Channel(s)  Avg Channel(s)

\*Optionally, apply any filters.

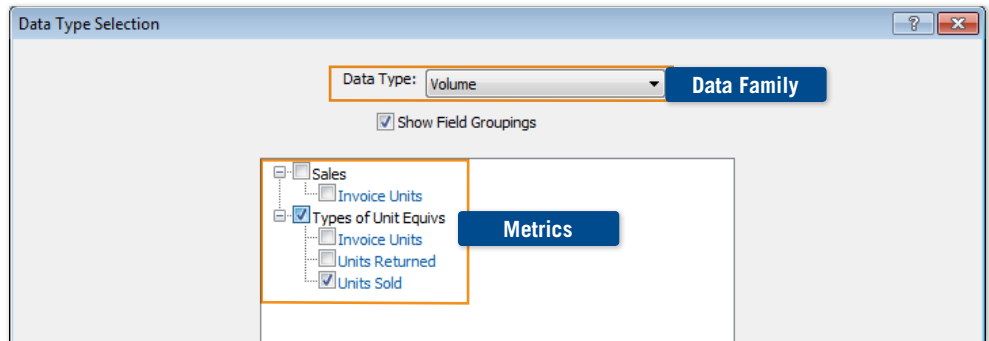
#### 4. Metrics:

Click axis label to open dialog.



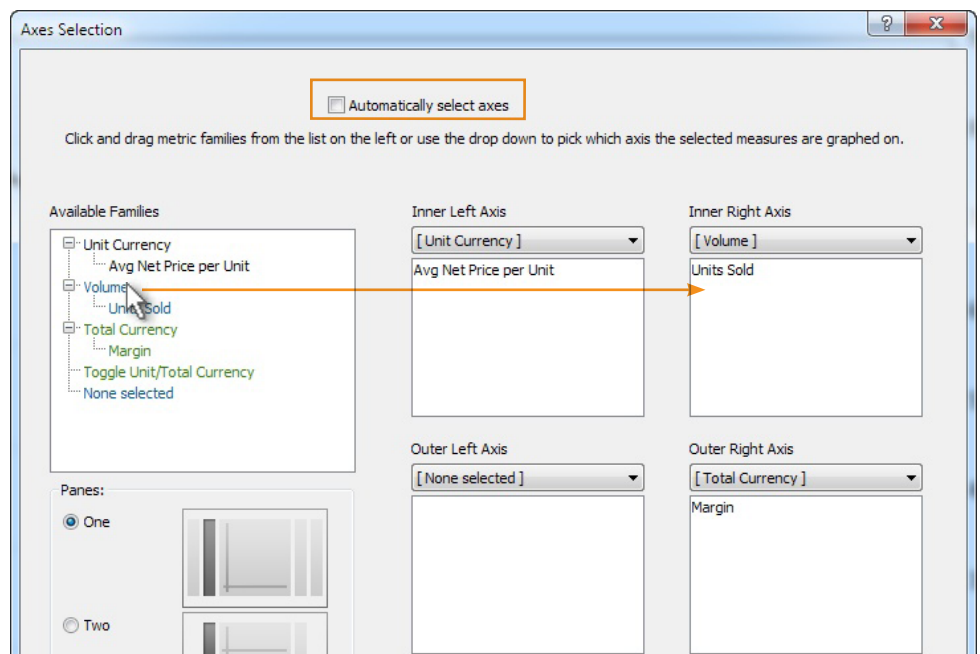
In Data Type Selection dialog, select all of the metrics to display. (In the next dialog, you will be able to assign metrics to axes.)

- Select the data family (e.g., volume, total currency, etc.) of the metric(s).
- Check the boxes of the metrics.
- Repeat until you have checked the boxes of all metrics to display.
- Click **Next** when you are finished selecting metrics.



In the Axes Selection dialog, select “where” you want to graph each family or single metric.

- Clear the Automatically Select Axes box.
- Drag and drop the available data family and/or single metric to the desired axis. Only metrics and associated families that you selected in the previous dialog are available. Click **Back** to add metrics.



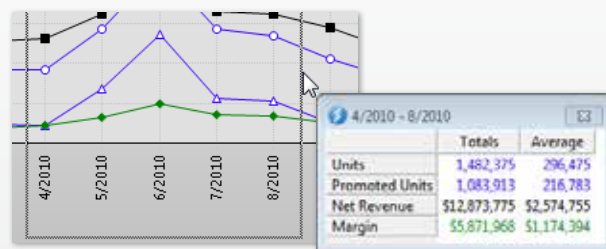
#### 5. Save bookmark:

**Bookmarks > Add Bookmark**

Select Most Recent or Most Recent Complete option to update automatically.

### Additional Concept: Rubber-banding dates

To see details for any subset of the date range, RIGHT-CLICK and drag (available in any time-series).

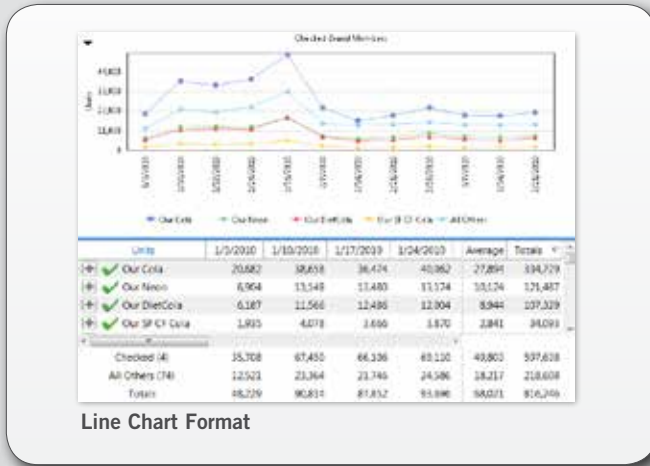


Tracking Performance Over Time, Trend Analysis

# Trend multiple “things”

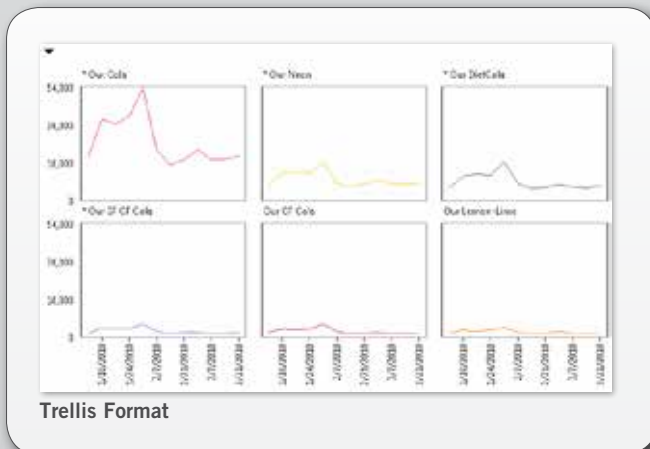
Identify performance trends for all members within any business segment.

## Comparison trend



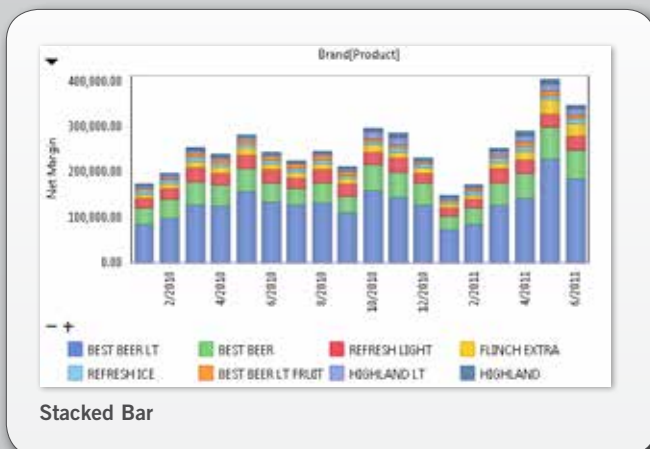
Line Chart Format

## Individual trends “side-by-side” for comparison



Trellis Format

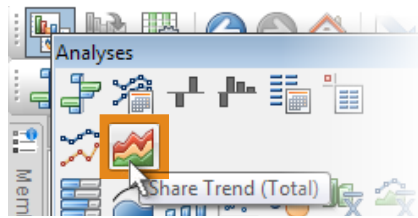
## Trend of individual segments “stacked” to show totals over time



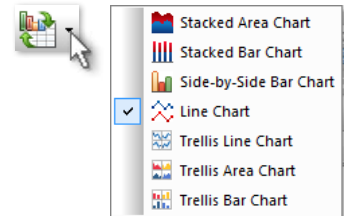
Stacked Bar

**1. Analysis:**

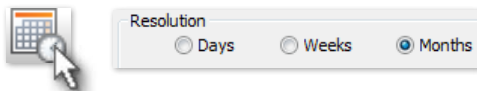
Analysis > Share Trend (Total)



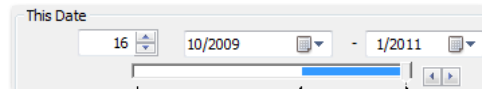
Select graph format (see examples on the previous page).



**2. Time-frame:** Select units of time.



Select how many and when.



**3. Context:**

Select segments.



\* Optionally, apply any filters.

– Switch to numbers.



– Checkmark items.



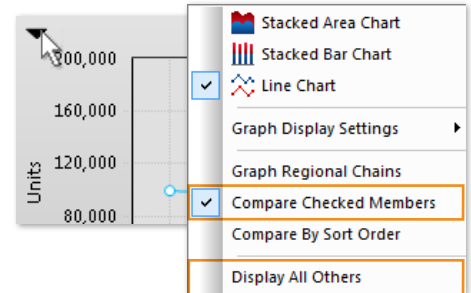
– Switch back to graph.



<input checked="" type="checkbox"/> Regional Chain	<input checked="" type="checkbox"/> Conv With Gas
59,601	27,940
64,511	21,981

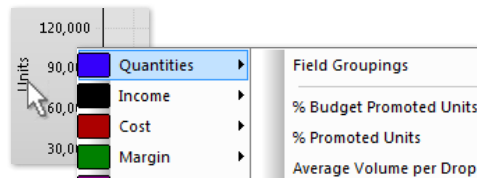
In the graph:

- Click arrow to open menu.
- Select “Compare Checked Members”
- Uncheck “Display All Others”



**4. Metrics:**

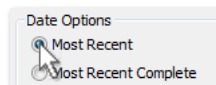
Click axis label and select.



**5. Save bookmark:**

Bookmarks > Add Bookmark

Select Most Recent or Most Recent Complete option to update automatically.



Tracking Performance Over Time, Trend Analysis

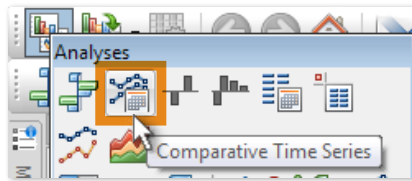
# Rolling 12-month vs. YAG bar/line chart

Find when high growth or performance challenges occur vs the past or forecast

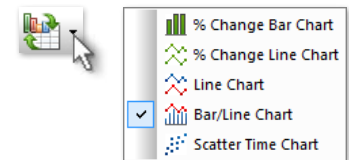


1. Analysis:

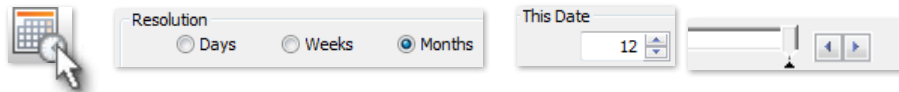
Analysis > Comparative Time Series



Select from the available chart types



2. Time-frame: Select most recent 12 months (or similar if using custom periods).



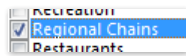
3. Context: Select any sub-groupings of business segments

\*Optionally apply any filters. See the page called "Choose the Context"

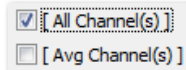


The Comparative Time Series shows data for the item in focus. Options include:

– Single item



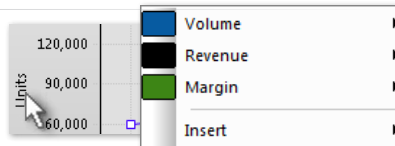
– Total or average of all items



\*Optionally, apply any filters.

4. Metrics:

Click axis label and select or insert a metric.

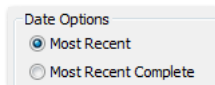


5. Save bookmark:

Bookmarks > Add Bookmark

Select Most Recent or Most Recent Complete

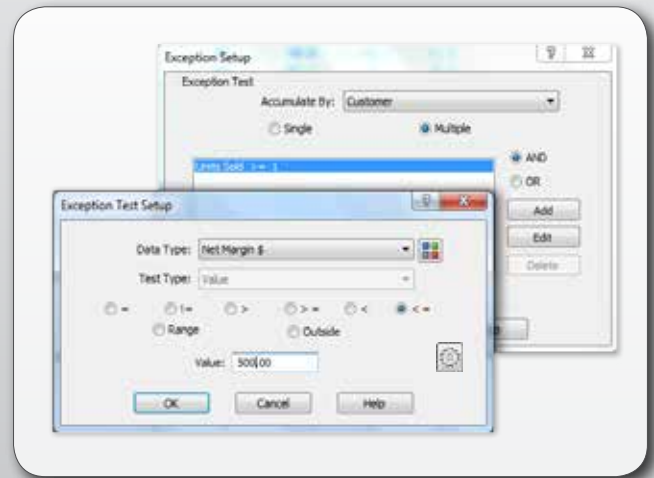
option to update automatically.



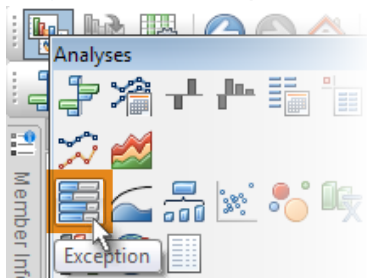
Exception Analysis

# User-Defined Exceptions

Set any performance-based criteria such as:  
 % Distribution by Brand, Channel, Rep,  
 etc. *who did and did not buy within any  
 business segments.*



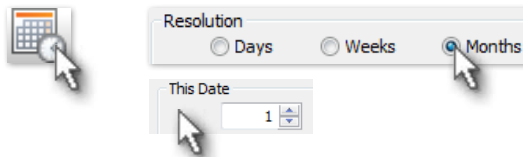
**1. Analysis:** choose the Exception.



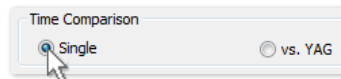
Use the Numbers/Graph Toggle if you are not already in a grid view

**2. Time-frame:**

Select most recent week, MTD, YTD, or any other time-frame.



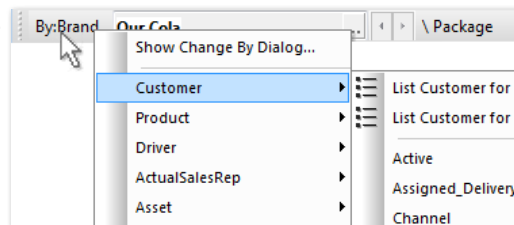
Select time comparison.



**3. Context:**

Select any sub-groupings of business segments

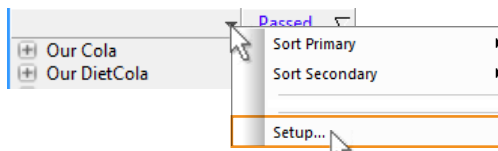
\*Optionally apply any filters.



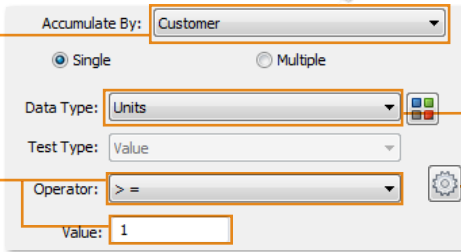


**4. Test setup:**

Place cursor over upper left box and click arrow to select Setup from the Options menu, or access these options using the Exception Setup dialog (Analyses > Exception > Dimension Members).



Select what to test and count.



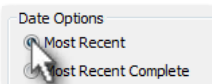
Select the test metric.

Select test criteria.

Tip: Click this button to open a column setup area where you can add difference and percent change since the previous time period (not available for single time comparisons).

**5. Save bookmark:**

Bookmarks > Add Bookmark  
Select Most Recent or Most Recent Complete option to update automatically.



**Automated exceptions:**  
(e.g. list of non-buyers)

Automated exceptions (i.e., automatically updated lists of buyers/non-buyers or pass/fail for any other performance criteria) can be achieved using the "Of These" feature. See page 49.

**List buyers / non-buyers:**

List out customers who passed or failed the test.



Total Failed (Customer): 20

	CustName	Units
11900	VILLAGE NORTH	0
11903	VILLAGE NORTH # 27	0
11906	VILLAGE NORTH # COC/07	0
11909	VILLAGE NORTH # PF/17	0
11911	VILLAGE NORTH # SS/17	0
70222	OBECK INC #FS	0
70236	OBECK INC #931D	0

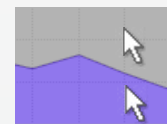


Tip: To insert related customer information: Place your cursor over heading, click arrow, and select descriptions/dimensions.

	Totals	Passed	% Passed	Failed
Industrial	578	222	38.4	356
Schools	458	204	44.5	254
Recreation	411	130	29.3	281
Restaurants	411	182	44.3	229



In bar graph, DOUBLE-RIGHT-CLICK colored (passed) or gray (failed) section of bar.



In time-series graph, DOUBLE-RIGHT-CLICK colored (passed) or gray (failed) area above desired date.

To List: In grid, DOUBLE-RIGHT-CLICK under passed or failed column.

Exception Analysis

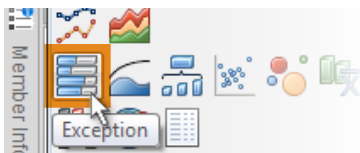
# Distribution Gap Analysis

Identify “gap” in distribution by listing out products or customers who passed or failed a test based on your criteria.

	CustName	SalesRep
00073	BETTER BARGAINS	Pence, Thomas
00074	BETTER BARGAINS # 7721	TS-Kinser
00075	BETTER BARGAINS # 8596	TS-Kinser
00076	BETTER BARGAINS # 3966	Gordon, Pat
00078	BETTER BARGAINS # 9836	TS-Lasoski
00079	BETTER BARGAINS # 4696	TS-Lasoski
00080	ADVANCE SYSTEMS ID, CO	TS-Lasoski

Non-buying customers for selected segment (i.e., "failed" customers)

1. Analysis: choose the Exception.

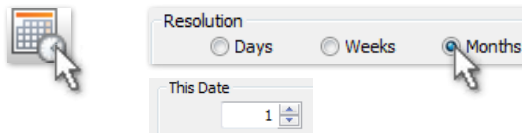


Use the Numbers/Graph Toggle if you are not already in a grid view

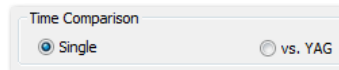
	Passed	% Passed	Failed	% Failed
Our Cola	2,064	35.3	3,777	64.7
Our DietCola	1,740	29.8	4,101	70.2
Our Neon	1,428	24.4	4,413	75.6
Our Lemon-Lime	1,350	23.1	4,491	76.9
Hires Root Beer	939	16.1	4,902	83.9
Orange	655	11.2	5,196	88.8
Our SF CF Cola	630	10.8	5,211	89.2
Ginger Ale	628	10.8	5,213	89.2
Average	176	3.0	5,965	97.0

2. Time-frame:

Select most recent week, MTD, YTD, or any other time-frame.



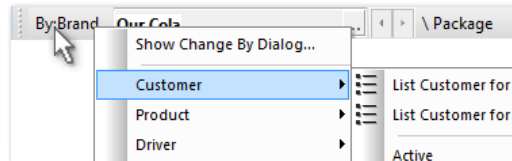
Select time comparison.



3. Context:

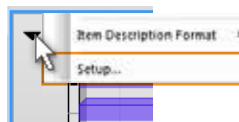
Select any sub-groupings of business segments

\*Optionally apply any filters.



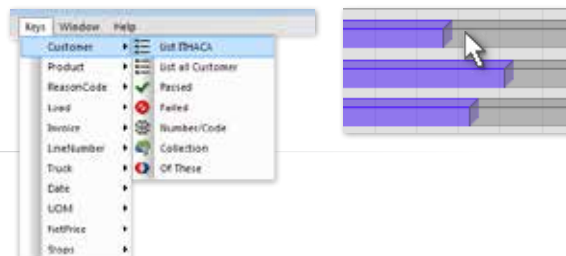
4. Test Setup: Click arrow in upper-left corner and select Setup.

Select test settings in dialog (See Step 4 of User Defined Exceptions, Page 25).



5. List Customers: DOUBLE-RIGHT-CLICK on the gray area to list failing customers within any segment; DOUBLE-RIGHT-CLICK on the colored area to list passing customers.

or choose from the “Keys” menu

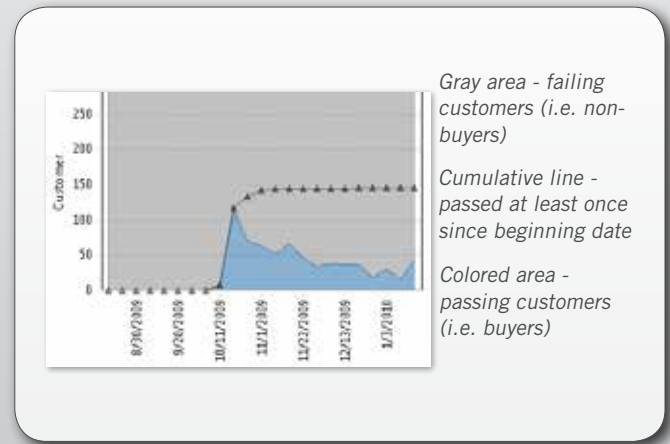


6. Save bookmark

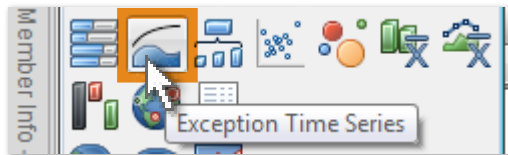
Exception Analysis

# New Product Intro / Penetration Over Time

Trend number of customers who pass and fail (i.e. buyers and non-buyers) over time. Identify product life-cycle, rate of introduction, market reaction to new products and customized penetration test results based on your own criteria.



1. Analysis: Choose the Exception Time Series.

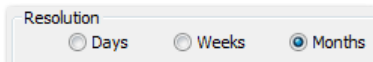


Use the Numbers/Grid toggle to switch to graph view.

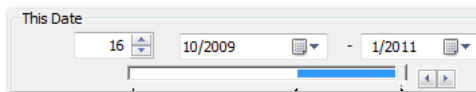
2. Time-frame:



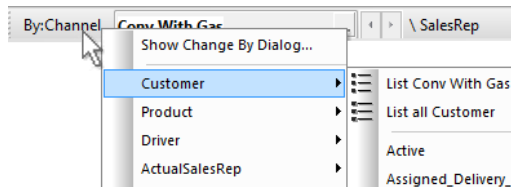
Select units of time.



Select how many and when.



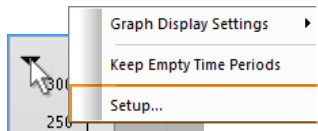
3. Context: Select segments.



Select focus.

4. Test setup: Click arrow in upper-left corner and select Setup.

Select test settings in dialog (same as previous).



5. Save bookmark:

Bookmarks > Add Bookmark

Select Most Recent

## Advanced test criteria:

Previous examples use the basic test of customers with Sales Units greater than or equal to 1. Easily customize the test.

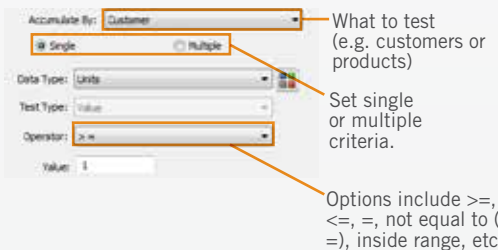


Open setup:

In grid, place cursor over upper-left box and click arrow.

In graph, click arrow in upper-left corner.

Select Setup.



Multiple criteria:

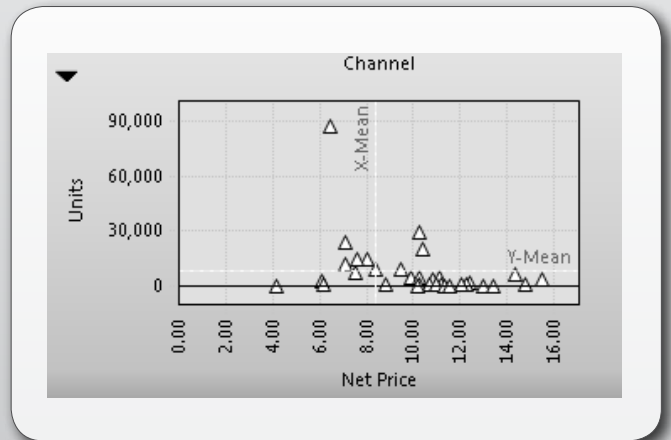


Define multiple criteria that customers, products, etc., must pass. Specify that they must pass all criteria (AND) or at least one (OR).

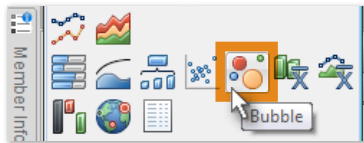
## Scattergram Analysis

# Scattergram Analysis

Determine outliers at a summary business segment level (channels, sales representatives, brands, etc.)



- 1. Analysis:**  
Analysis > Bubble

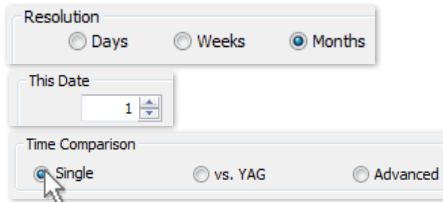


Select graph format



- 2. Time-frame:**

Select most recent week, MTD, YTD, or any other time-frame.



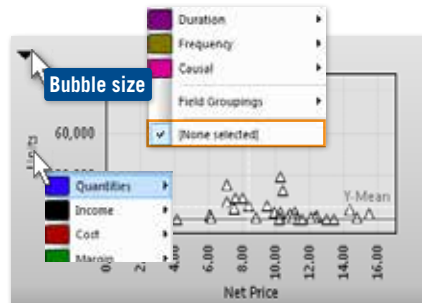
Select single comparison.

- 3. Context:**  
Select segments.

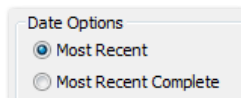


\*Optionally, apply any filters. See the context section in "Getting Started".

- 4. Metric:**  
Click label and select:  
Bubble size—Choose [None Selected]  
x axis & y axis - Choose any metric

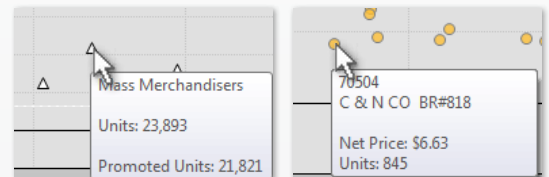


- 5. Save bookmark:**  
Bookmarks > Add Bookmark  
Select Most Recent or Most Recent Complete option to update automatically.



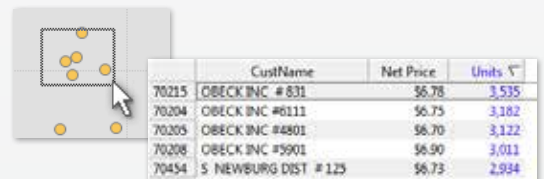
## Learn more:

**Identify:**  
Mouseover any point to see its name and values.

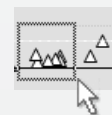


**Rubber-band and list:**  
RIGHT-CLICK and drag to select and list out any points.

\*At the business segment level, this lists out underlying details (customers, SKUs, etc.)



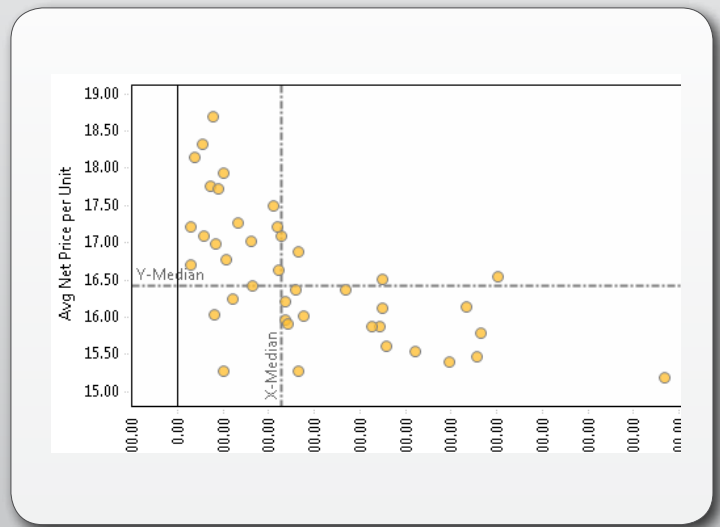
**Zoom:**  
Click and drag to zoom in.



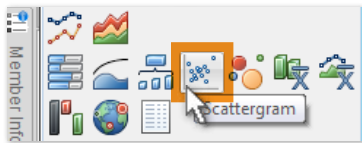
Scattergram Analysis

# Simple Scattergram

Determine outliers at the lowest level of detail (SKU, customer, etc.)




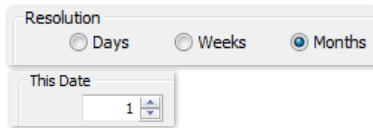
- 1. Analysis:  
Analysis > Scattergram




Select graph format



- 2. Time-frame:  Select most recent week, MTD, YTD, or any other time-frame.



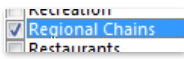
- 3. Context:  
Select segments. By: 

Select focus.

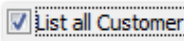
The Scattergram shows data for the focus only.

Options include:

—Single member

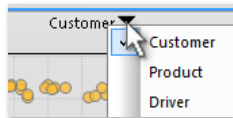


—All members

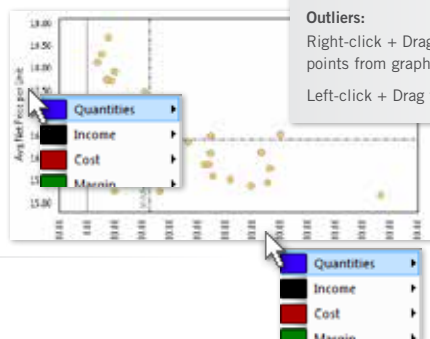


\* Optionally, apply any filters.

- 4. What to graph:  
Click label above graph and make selection.



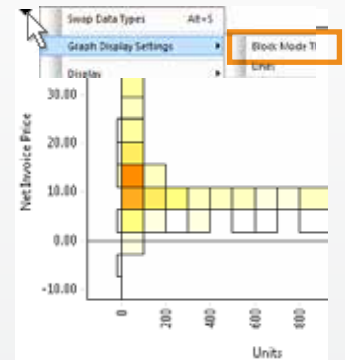
- 5. Metrics:  
Click each axis label and select metric.



- 6. Save bookmark:  
(see previous)

## Block mode:

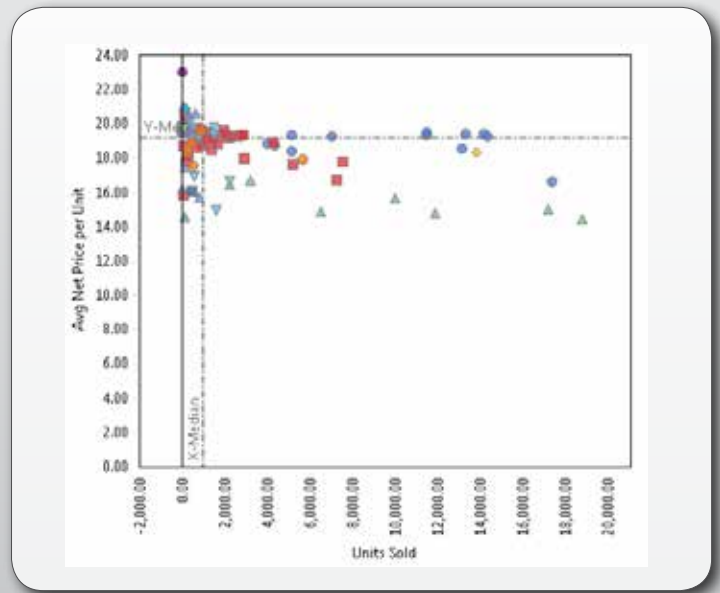
If the Scattergram has many points, the graph can group the points together into “blocks” to improve performance and show where points are clustered together.



Scattergram Analysis

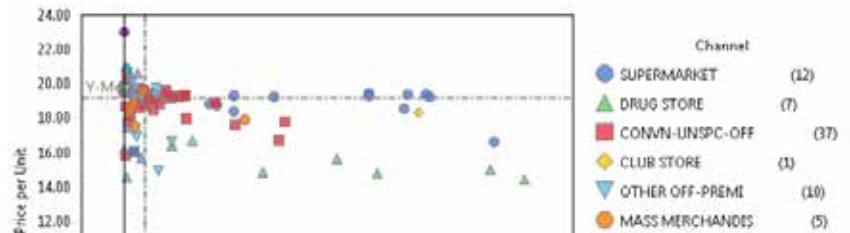
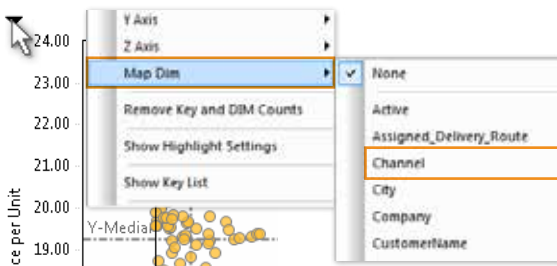
# Enhanced Scattergram

“Color and shape” by secondary segment or third metric for added intelligence

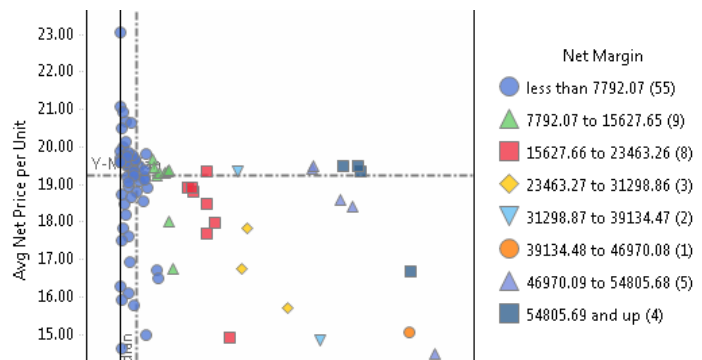
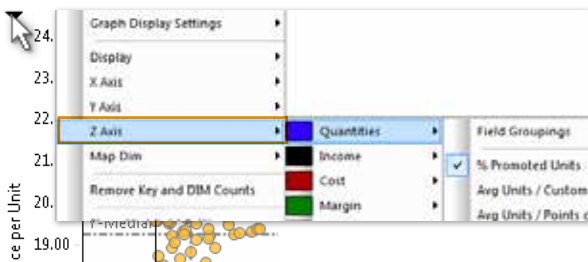


Same as simple Scattergram plus:

For a secondary segment (e.g., Channel), click arrow in upper-left corner and select the Map Dim option and then the desired business segment.



For a third metric, select a Z axis option.



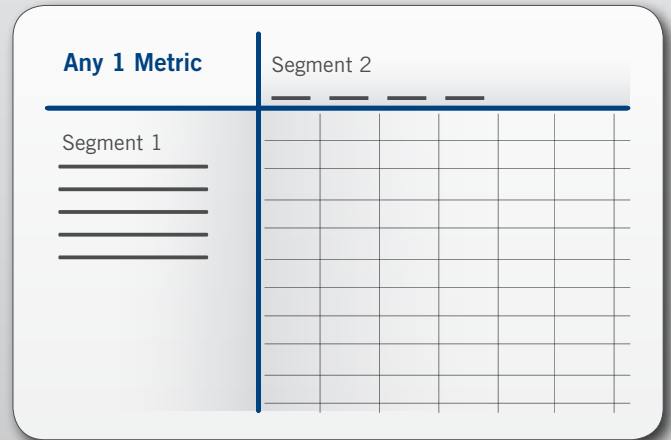
Crosstab analysis, matrix any two business segments

# Crosstab

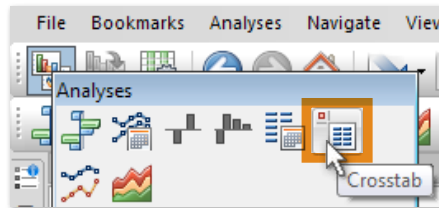
Identify performance for any metric within any two business segments

**Example:**

- Brand sales by Sales Rep
- Supplier sales by Region
- Chain Account sales by Product Category
- Customer list by related group of SKU's



- 1. Analysis:**  
Analysis > Crosstab



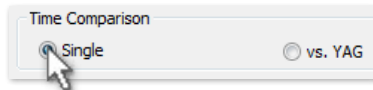
Use the Numbers/Grid toggle if you are not already in grid view.



- 2. Time-frame:** Select any date(s) (days, weeks, months, YTD, etc.).

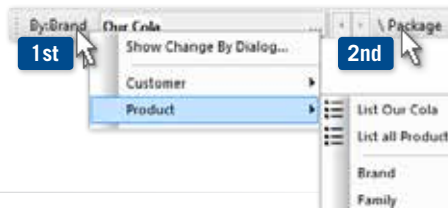


Select a Single comparison.

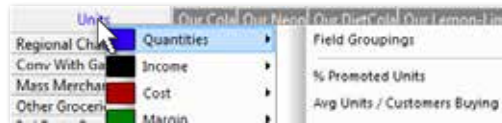


- 3. Context:**  
Select two related business segments.

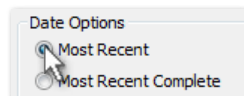
\*Optionally, apply any filters.  
See the SIM Getting Started Guide.



- 4. Metrics**  
Click metric in upper-left box and select from menu.



- 5. Save bookmark:**  
Bookmarks > Add Bookmark



Select Most Recent or Most Recent Complete option to update automatically.

Crosstab analysis, matrix any two business segments

# Crosstab

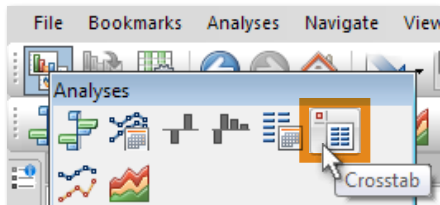
Identify performance for any two metrics within any two business segments

**Note:** for sub-grouping and more advanced comparison; consider the same intelligence that the “Comparative Dim Member” analysis provides

Any 2 Metrics	Segment 2			
	Measure 1	Measure 2	Measure 1	Measure 2
Segment 1				

## 1. Analysis:

Analysis > Crosstab



Use the Numbers/Grid toggle if you are not already in grid view.

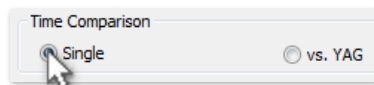


## 2. Time-frame:



Select any date(s) (days, weeks, months, YTD, etc.).

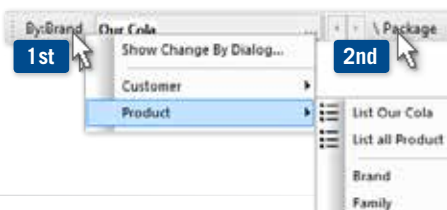
Select a Single comparison.



\* Comparison must be Single

## 3. Context:

Select two related business segments.

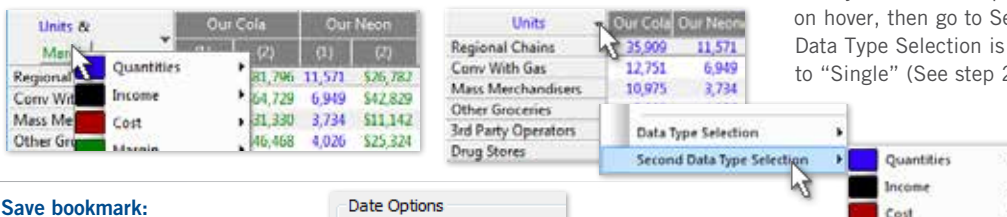


\*Optionally, apply any filters.

See the SIM Getting Started Guide.

## 4. Metrics

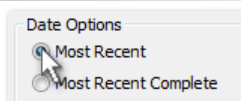
Click each metric in upper-left box and select from menu.



\*If only one metric is present in box, click the arrow shown on hover, then go to Second Data Type Selection. If Second Data Type Selection is unavailable, change the time-frame to “Single” (See step 2).

## 5. Save bookmark:

Bookmarks > Add Bookmark



Select Most Recent or Most Recent Complete option to update automatically.



Crosstab analysis, matrix any two business segments

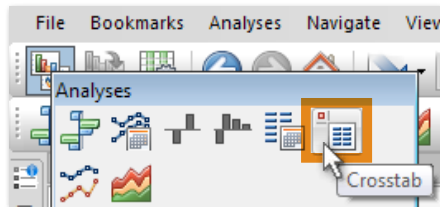
# Crosstab

## Variance vs. YAG

*Identify gains & losses vs year ago for any metric within any two segments.*

Any 1 Metric vs YAG	Segment 2					
	Diff	%Chg	Diff	%Chg	Diff	%Chg
Segment 1						

- 1. Analysis:**  
Analysis > Crosstab



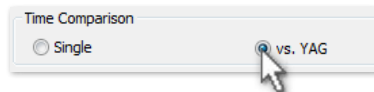
Use the Numbers/Grid toggle if you are not already in grid view.



- 2. Time-frame:** Select any date(s) (days, weeks, months, YTD, etc.).

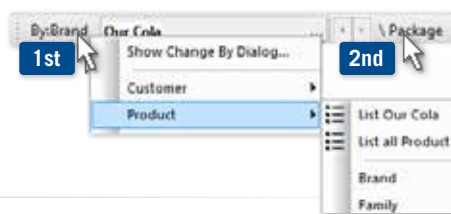


Select a YAG comparison.



- 3. Context:**  
Select two related business segments.

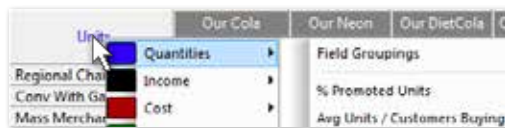
\*Optionally, apply any filters.  
See the SIM Getting Started Guide.



Product	Our Cola	Our Neon
BEST BEER LT	11,379	30,505
BEST BE	17,894	13,410
REFRESH	48,038	14,303
REFRESH	17,764	7,909
FUNCH EXTRA	6,463	2,863
HIGHLAND LT	28,214	3,881
HIGHLAND	28,428	4,910
BEST BEER LT PRST	0	1,855
BEST BEER BLOCKED	0	4,221
BEST CHOICE	1,134	2,967

- 4. Metrics**  
Click metric in upper-left box and select from menu.

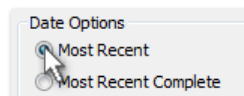
\*If two metrics are present in box, click second metric and choose None Selected to accomplish this view.



- 5. Variance:**  
Click arrow in upper-left box and select Show Delta Values.

Units	Our Cola		Our Neon	
	This	Last	This	Last
Regional Chains	35,909	29,997	11,571	8,622
Conv With Gas	12,751	14,140	6,040	7,130
Mass Merchandisers				
Other Groceries				
3rd Party Operators				

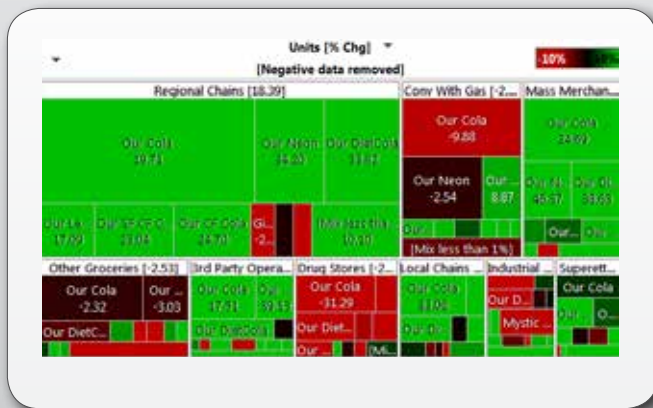
- 6. Save bookmark:**  
Bookmarks > Add Bookmark  
Select Most Recent or Most Recent Complete option to update automatically.



Crosstab analysis, matrix any two business segments

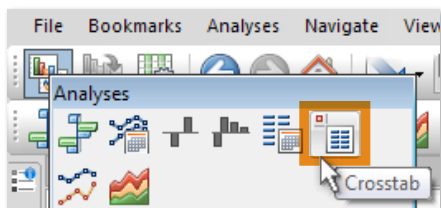
# Deltamap

Visually identify gains & losses vs year ago for any metric within any two segments. Also compare share for each area to focus on what's important.



### 1. Analysis:

Analysis > Crosstab



Select Deltamap.



If Deltamap is not listed, you may need to:

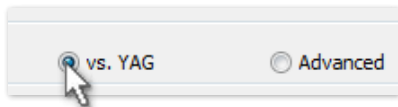
- Select YAG or Advanced comparison (see below).
- Select a different metric (one that can be divided logically).

### 2. Time-frame:

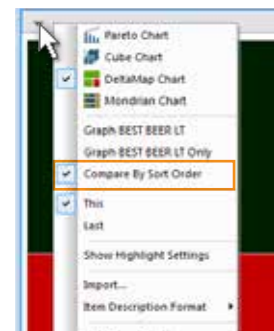
Select any date(s) (days, weeks, months, YTD, etc.).



Select another period to compare against (YAG or Advanced).



Choose "Compare By Sort Order" from the Chart Options

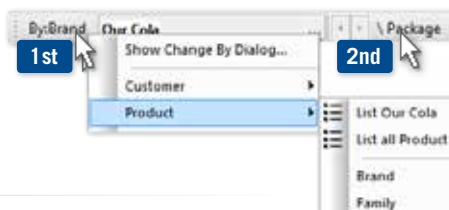


### 3. Context:

Select two related business segments.

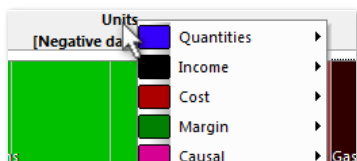
- 1st: major blocks (e.g. brands)
- 2nd: subsections (e.g. packages within each brand)

\*Optionally, apply any filters.



### 4. Metrics

Click metric at top of Deltamap.



### About the Deltamap:

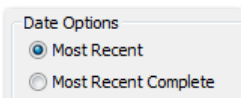
Large green blocks show the biggest positive changes; large red blocks show the biggest negative changes.



Place your cursor over any block to see what it represents and the underlying numbers.

### 5. Save bookmark:

Bookmarks > Add Bookmark



Select Most Recent or Most Recent Complete option to update automatically.

Profit and Loss Analysis

# P&L Format, for any one part of the business at a time

List many metrics vertically, for a consolidated scorecard for any segment.

Any Metrics	MTD or YTD	YAG	Diff vs YAG	% Chg
Segment 1				
_____				
_____				
_____				
_____				
_____				
_____				
_____				
_____				
_____				

- 1. **Analysis:**  
Analysis > P&L Format

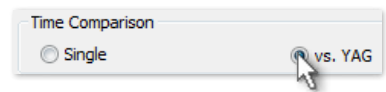
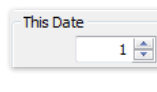
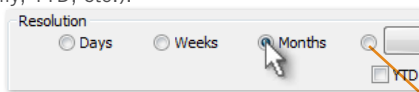


Use the Numbers/Grid toggle if you are not already in grid view.



- 2. **Time-frame:** Select date range (weekly, monthly, YTD, etc.).

\* Also see "MTD/YTD option."



Select YAG.

- 3. **Context:**  
Select segments.

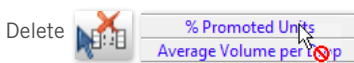
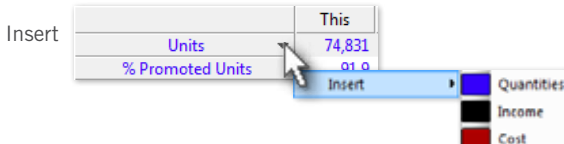


Select focus.

The P&L shows data for the item in focus. Options include:

- Single item
  - Regional Chains
  - Restaurants
- Total or average of all
  - All Channel(s)
  - [ Avg Channel(s) ]

- 4. **Metrics:** Insert and / or delete



## Period Tables

To use a period table, choose from the drop down shown here in the date dialogue box.

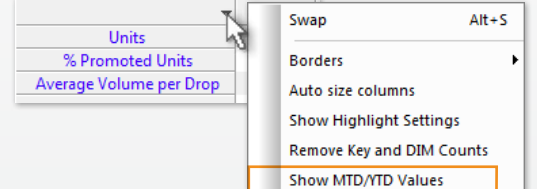
## Consolidated MTD/YTD

switches the time-frame to show:

MTD and YTD with the selected columns under each heading.

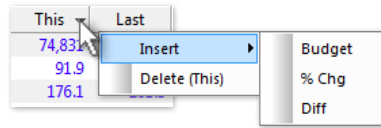
Month				YTD			
This	Diff	% Chg	Budget	This	Diff	% Chg	Budget
74,831	-40,673	-35.21	62,246	74,831	-40,673	-35.21	62,246
91.9	-0.4	-0.40		91.9	-0.4	-0.40	
176.1	-85.2	-32.62		176.1	-85.2	-32.62	

Click the arrow shown on over in the upper-left corner to select this option.



**5. Columns: (This, Last Diff, % Change, Budget, etc.)**

Click arrow in column heading or right-click and choose Insert.



Use the Delta Pointer Cursor Tool to add Diff/% Change vs Budgets

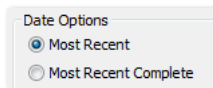
Click once to activate then click the field headings based on the logical "order of operations."



**6. Save bookmark:**

**Bookmarks > Add Bookmark**

Select Most Recent or Most Recent Complete option to update automatically.



**Example**

**P & L MTD vs YAG**  
For any 1 part of the business

**Performance Indicator:**  
The actual Gain or Loss (Diff) vs YAG.

**Answers the question:**  
Exactly how much are we up or down MTD vs YAG in any 1 part of the business comparing many different metrics.

**Metrics:**  
any metrics chosen from the "insert menu" or using the pointer tools to perform math.

**Segmentation:**  
any 1 segment and each member within that segment individually.

Resources (0)  
No Resources Available.

Comments (0)  
No Comments Available.

	This	Last	Diff	% Chg
Units	6,560	25,794	-19,234	-74.57
Gross Revenue	\$83,394	\$307,429	(\$224,035)	-72.87
Net Revenue				
Discounts	(\$29,647)	(\$109,720)	\$80,073	72.98
Customer Support	\$0	\$20,154	(\$20,154)	-100.00
Margin				
COGS	\$31,629	\$115,132	(\$83,502)	-72.53
% Margin	41.2	35.2	6.0	17.05
Other Product Cost	\$7,171	\$29,216	(\$22,044)	-75.45
Merch Cost	\$4,920	\$19,346	(\$14,426)	-74.57
Net Margin				
Commissions	\$3,207	\$13,395	(\$10,189)	-76.06
Recoveries	(\$955)	(\$3,525)	\$2,570	72.90
% Net Margin	27.8	18.7	9.1	48.68
Repair & Depr Cost	\$182	\$285	(\$104)	-36.32
Avg Repair Hrs per	.30	.13	.17	123.88
Variable Op Profit	\$14,764	\$32,923	(\$18,158)	-55.15
Variable Op Profit %	27.5	18.5	8.9	48.15
Avg Var Op Profit	\$2.25	\$1.28	\$.97	76.33
Drops	45	68	-23	-33.82
WO_Count	6	2	4	200.00
Repair Time_hrs	6.0	2.4	3.6	154.23
ActiveCustCount	4.0	4.0	.0	.00

## Profit and Loss Analysis

### Consolidated P&L across multiple parts of the business

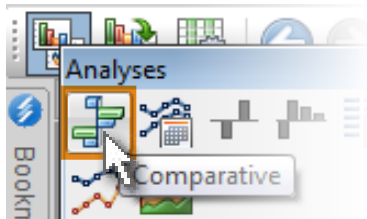
Vertically list gains & losses for all members within any group to target areas for improvement.

**Example:**

- Gross P & L for each region
- Sales figures and distribution stats for each division

	Multiple	Segments	Multi	Segments
Measures				
Grouped				
by Time				
Period				
Current Totals, Mix, vs YAG vs Forecast, (For each metric)				

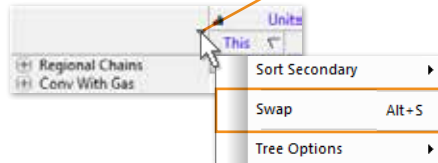
**1. Analysis:** choose the “Comparative”



Use the Numbers/Graph Toggle if you are not already in a grid view

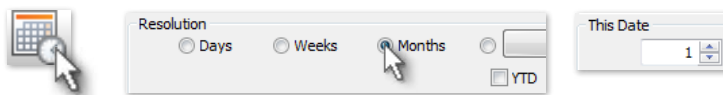
Click the visual indicator that displays on hover in the upper left grey box (or right click) to access the swap option.

Swap rows/columns.

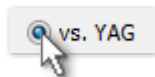


**2. Time-frame:** Select date range (weekly, monthly, YTD, etc.).

(or select the current month if you have forecasts or “future time periods” in your data-set.)



Select comparison period

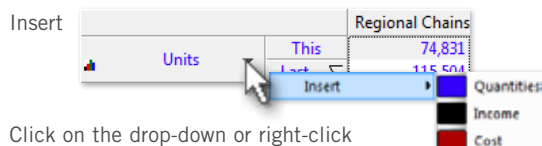


**3. Context:** Select any sub-groupings of business segments

\*Optionally apply any filters.

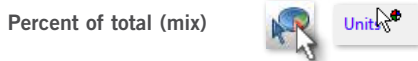
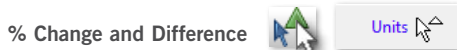


**4. Metrics:** Insert and / or delete



Click on the drop-down or right-click an existing measure to add or delete metrics

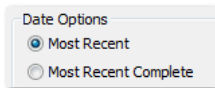
5. Add Variance, Mix, Budgets:



Budget/forecast: same as inserting metrics above

6. Save bookmark:

Bookmarks > Add Bookmark  
Select Most Recent to automatically update



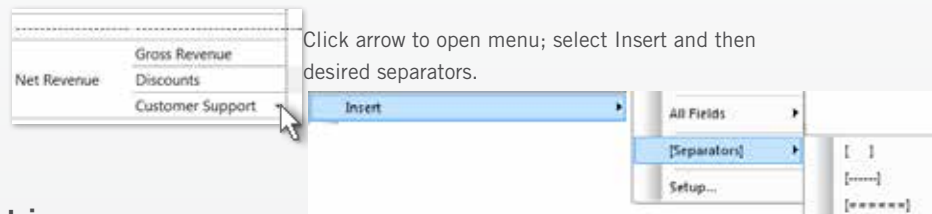
Example

		Obeck Inc. North	S.Newburg Dist-North	Village North	Obeck Inc. South	C & N Comp	Totals
Units	This	15,205	11,479	6,560	2,965	1	39,267
	Diff	-23,513	-23,471	-19,234	-3,879	-3	-76,237
	Mix (T)	38.7	29.2	16.7	7.6		100.0
	Diff (Mix)	5.2	-1.0	-5.6	1.6		.0
Net Revenue	Gross Revenue This	\$187,671	\$148,848	\$83,394	\$35,606	\$23	\$495,299
	Discounts This	(\$71,160)	(\$59,236)	(\$29,647)	(\$13,782)	(\$6,	(\$186,178)
	Customer Support This	\$0	\$0	\$0	\$0		\$0
COGS	This	\$67,666	\$54,583	\$31,629	\$12,749	\$8	\$181,464
	Diff	(\$103,234)	(\$102,784)	(\$83,502)	(\$17,527)	(\$17,	(\$333,352)
Merch Cost	This	\$6,082	\$4,018	\$4,920	\$1,186	\$1	\$17,824
	Diff	(\$9,405)	(\$8,215)	(\$14,426)	(\$1,552)	(\$2,	(\$36,919)
Net Margin	Commissions This	\$8,361	\$6,063	\$3,207	\$0	\$	\$18,464
	Diff	(\$12,123)	(\$12,384)	(\$10,189)	\$0	(\$2,	(\$36,722)
Recoveries	This	(\$2,069)	(\$1,583)	(\$955)	(\$402)	(\$	(\$5,420)
	Diff	\$3,333	\$3,438	\$2,570	\$502	\$	\$10,744

# Additional Concepts:

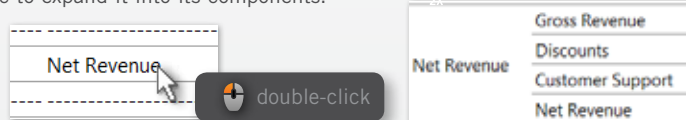
## Separators

Insert horizontal lines or spaces to separate groups of related metrics.



## Expanding metrics

Double-click on a calculated metric to expand it into its components.



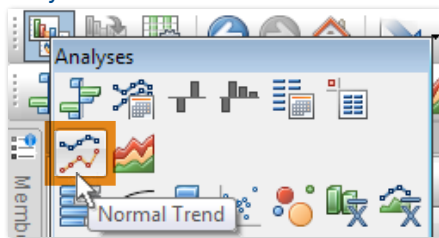
Profit and Loss Analysis

# Rolling 12-month P&L over time

Consolidate financials or many metrics for any part of the business over time (rolling Periods, Months, Weeks, Quarters...)

Any Metrics	Consecutive Days, Wks, Months Rolling 12 Month (Month over Month)				
Metric					
Metric					

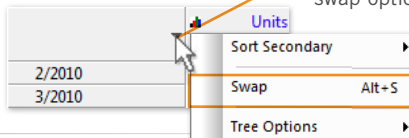
1. Analysis: choose the "Normal Trend"



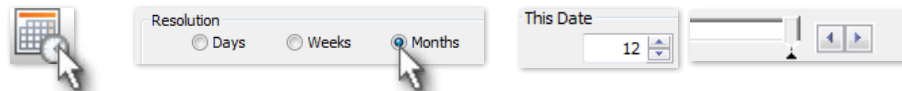
Use the Numbers/Graph Toggle if you are not already in a grid view

Left or right-click near the visual indicator that display on hover in the upper left grey box (or right click) to access the swap option.

Swap rows/columns.



2. Time-frame: Select most recent 12 months.



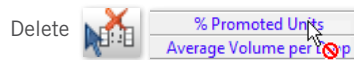
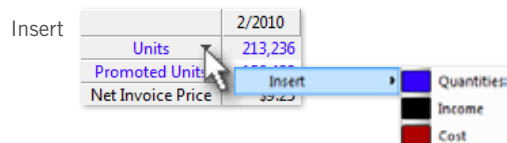
3. Context:

Select segments.



Select focus.

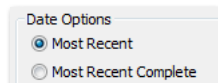
4. Metrics: Click label and select:



5. Save bookmark:

Bookmarks > Add Bookmark

Select Most Recent to automatically update



Profit and Loss Analysis

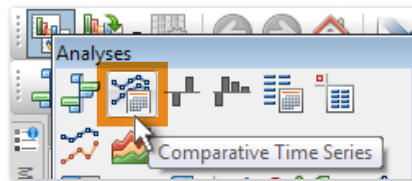
# Rolling 12-month P&L over time vs YAG

Identify gains & losses (diff & %change) vs Year ago or forecast with consolidated financials or other stats for any part of the business over time (rolling Periods, Months, Weeks, Quarters...)

Rolling 12 Month (Month over Month) vs YAG					
	Month vs YAG	Month vs YAG	Month vs YAG	Month vs YAG	Month vs YAG
Metric					

1. Analysis:

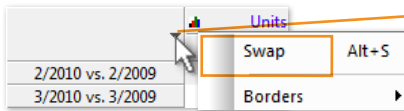
Analysis > Comparative Time Series



Select numbers grid.

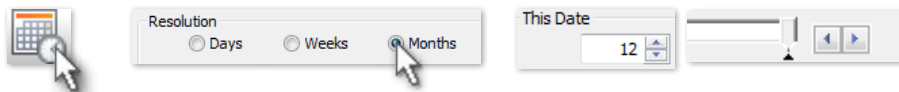


Swap rows/columns.



Left or right-click near the visual indicator that displays on hover in the upper left grey box (or right click) to access the swap option.

2. Time-frame: Select most recent 12 months.



Select vs. YAG



3. Context:

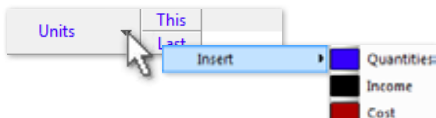
Select segments.



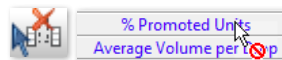
Select focus.

4. Metrics: Click label and select:

Insert

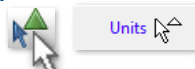


Delete



5. Add Variance and Budgets:

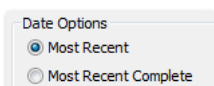
% Change and Difference



Budget/forecast - same as inserting metrics above

6. Save bookmark: Bookmarks > Add Bookmark

Select Most Recent to automatically update





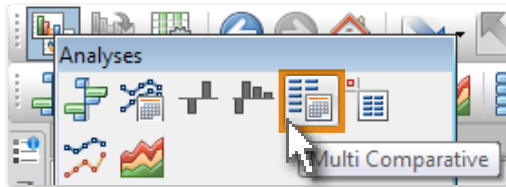
Profit and Loss Analysis

# P&L, for combinations of time periods

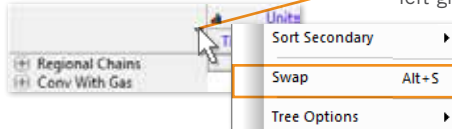
Consolidate your daily, monthly, MTD, YTD or period-based reporting into one consolidated gains & losses drill-down perspective to target areas for improvement.

	30 Day	MTD	YTD
Metric			

- 1. Analysis: Analysis > Multi Comparative



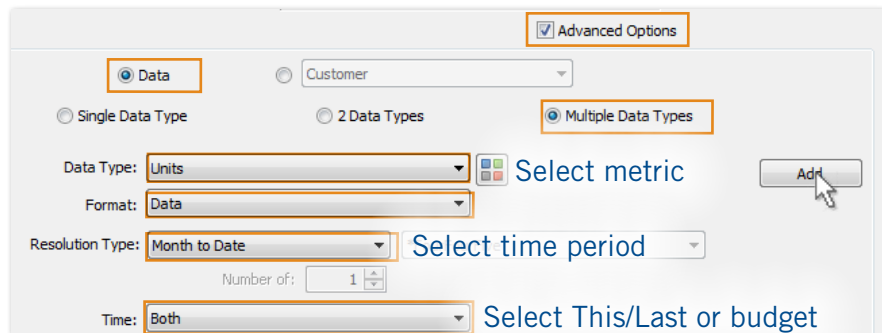
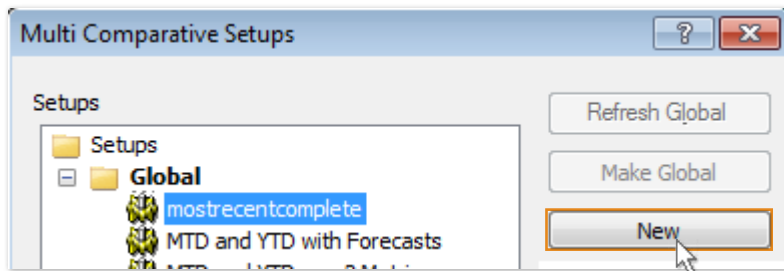
Swap rows/columns.



Click the visual indicator that display on hover in the upper left grey box (or right click) to access the swap option.

- 2. Configure columns with metrics by Time Period:

On the Analyses Menu, select Comparative > Multi-Comparative. In Multi Comparative Setup, click Setup. In the next dialog click New. Select options as shown and click Add.

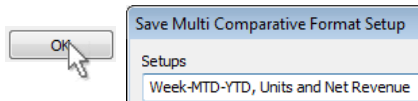


Repeat for additional metrics, time periods (week, MTD, YTD, multiple months, or multiple weeks) or budgets.

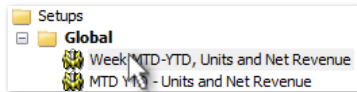
In preview pane, use pointer tools to add delta and/or mix. (Note: Metrics/time periods appear as columns in preview but will appear in rows when swapped.) Click and drag to rearrange.

	1 Week	Month to Date			Year to Date			1 Week	Month to Date	
	Units	Units			Units			Net Revenue	Net Revenue	
	This	This	Diff	% Chg	This	Diff	% Chg	This	This	Last

Save the new setup, Then select OK.



Apply setup.



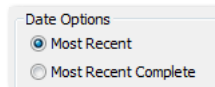
**3. Context:** Select any sub-groupings of business segments.

\*Optionally, apply any filters.



**4. Save bookmark:**

**Bookmarks > Add Bookmark**  
Select Most Recent to automatically update



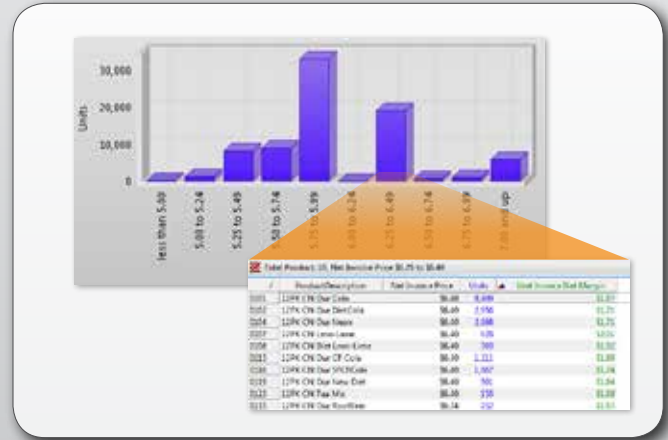
## Example

			Regional Chains	Conv With Gas	Other Groceries	Mass Merchandisers	3rd Party Operators	Totals
1 Week	Units	This	12,778	7,407	5,418	4,827	3,246	55,317
		This	39,267	23,061	17,859	11,629	10,394	168,646
Month to Date	Units	Diff	-28,565	-3,959	-2,883	-5,349	-3,520	-78,708
		% Chg	-42.11	-14.65	-13.90	-31.51	-25.30	-31.82
Year to Date	Units	This	39,267	23,061	17,859	11,629	10,394	168,646
		Diff	-28,565	-3,959	-2,883	-5,349	-3,520	-78,708
		% Chg	-42.11	-14.65	-13.90	-31.51	-25.30	-31.82
1 Week	Net Revenue	This	\$105,501	\$83,937	\$58,913	\$34,194	\$32,149	\$537,125
		This	\$309,121	\$260,292	\$192,872	\$83,782	\$91,314	\$1,596,873
Month to Date	Net Revenue	Diff	(\$212,626)	(\$26,639)	(\$27,342)	(\$37,145)	(\$22,096)	(\$626,612)
		% Chg	-40.75	-9.28	-12.42	-30.72	-19.48	-28.18
Year to Date	Net Revenue	This	\$309,121	\$260,292	\$192,872	\$83,782	\$91,314	\$1,596,873
		Diff	(\$212,626)	(\$26,639)	(\$27,342)	(\$37,145)	(\$22,096)	(\$626,612)
		% Chg	-40.75	-9.28	-12.42	-30.72	-19.48	-28.18

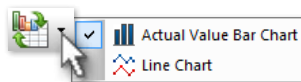
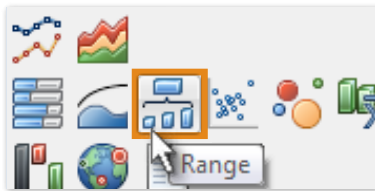
Range Analysis

# Price range analysis for any one product

How many are sold within each price range? Drill to a list of SKUs sold in any range. This analysis will group transactions within ranges for any measure you choose. Visual results help identify how high an item can be priced before demand significantly drops.

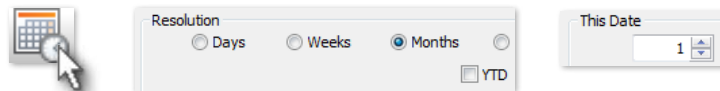


1. Analysis: choose the "Range"

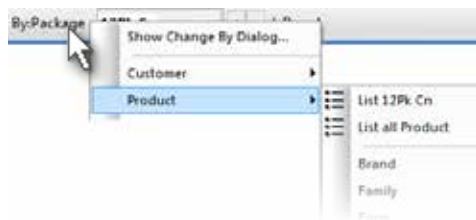


Click the graph format arrow and select Actual Value Bar Chart.

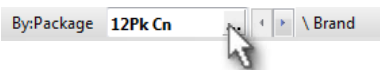
2. Time-frame: Select most recent week, MTD, YTD, or any other time-frame.



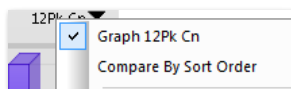
3. Context: Select a product segment



Focus on desired category.



Graph focus only (click label above graph)

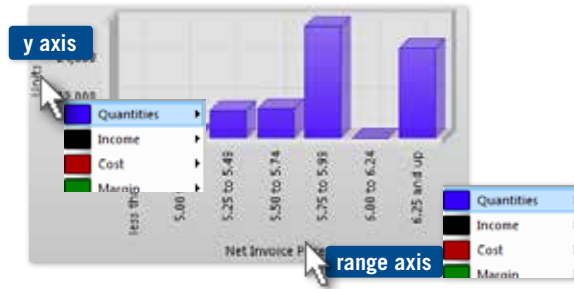


Optionally, apply customer segment filter (e.g., single region, sales rep, channel, etc.). See "Choose the Context" in the SIM Getting Started Guide.

**4. Metrics:** Click label and select:

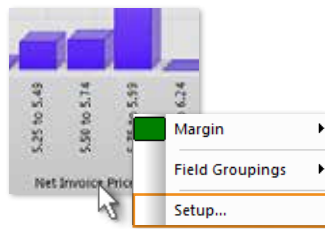
**range axis** - Choose average price metric.  
(or similar)

**y axis** - Choose sales volume metric.  
(or your own choice)



**5. Price ranges:** Choose how to segregate price ranges.

Click range axis label and select Setup.



Select method for determining ranges and # of ranges.

Optionally, define your own custom ranges.

**6. SKU list:**

**Double right-click** to list individual SKUs for that price range.

Insert other relevant metrics such as margin per unit.

Description	Net Invoice Price	Units
Cola	\$6.40	9,404
DietCola	\$6.40	2,956

**7. Save bookmark:**

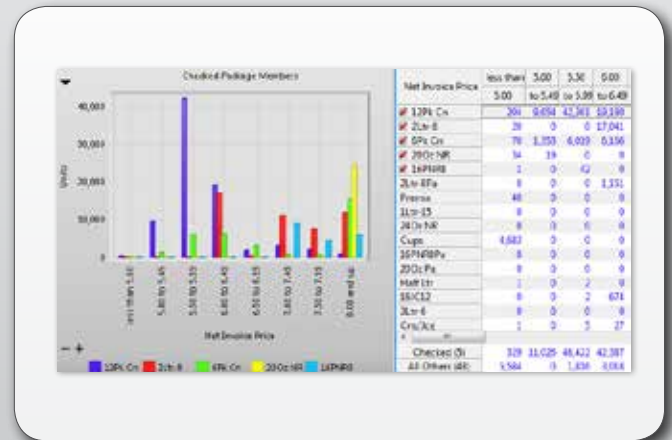
**Bookmarks > Add Bookmark**

Select Most Recent to automatically update

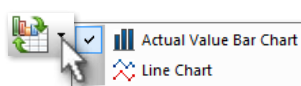
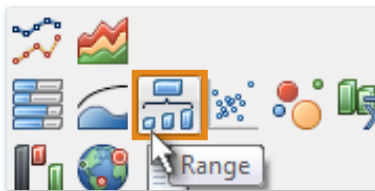
Range Analysis

# Price range analysis for multiple products

Compare pricing for multiple products; identify “sweet spots” where price can be positioned highest while still avoiding demand dropping off too dramatically.

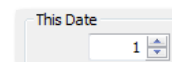
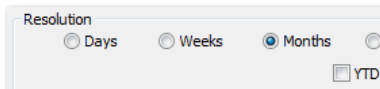


1. Analysis: choose the “Range”

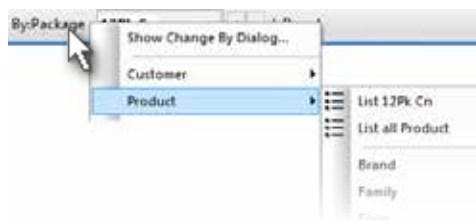


Click the graph format arrow and select Actual Value Bar Chart.

2. Time-frame: Select most recent week, MTD, YTD, or any other time-frame.

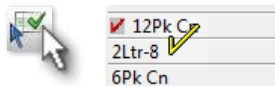


3. Context: Select a product segment



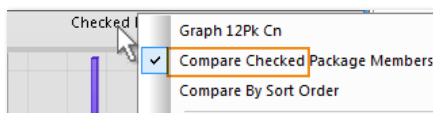
Pick products to graph:

Check-mark products.



Graph checked items

(click label above graph)

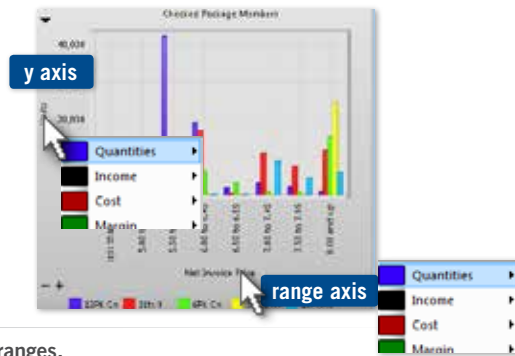


\*Optionally, apply any filters.

**4. Metrics:** Click label and select:

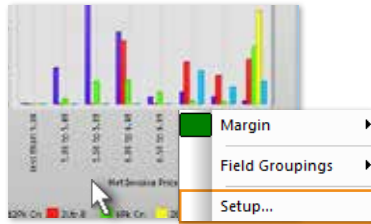
range axis - Choose average price metric.

y axis - Choose sales volume metric.



**5. Price ranges:** Choose how to segregate price ranges.

Click range axis label and select Setup.



Select method for determining ranges and # of ranges.

Data: Net Invoice Price

Test: Automatic Points

Points: 3

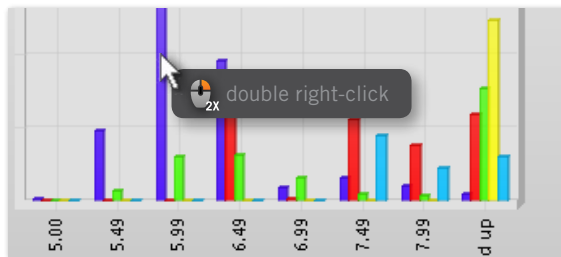
Setup

Standard Deviations  
Equal Size  
Automatic Points  
User Defined Equal Size

Optionally, define your own custom ranges.

**6. SKU list:**

Double right-click to list individual SKUs for that price range.



Insert other relevant metrics such as margin per unit.

escription	Net Invoice Price	Units
Cola	\$6.40	9,400
DietCola	\$6.40	2,956

Insert

**7. Save bookmark:**

Bookmarks > Add Bookmark

Select Most Recent to automatically update

Date Options

Most Recent

Most Recent Complete

# Demand by price point and customer

Are products being sold at price points outside the norm for any given market? Identify the prices that work best for any chain, market or individual customer.

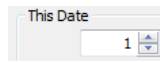
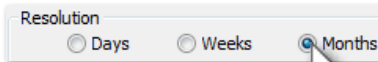
	CUs Sold		UnitNet Price \$		Margin \$	
	This	Diff	This	Diff	This	Diff
OTHER OFF-PREME	44,624.32	1,264.10	\$16.89	\$0.21	\$168,504.24	\$22,461.52
SUPERMARKET	37,909.11	2,319.85	\$16.88	\$0.18	\$127,681.10	\$11,011.54
BEST BEER LT	16,952.28	831.03	\$17.33	(\$0.12)	\$67,165.51	\$14,949.22
BEST BEER LT 30 PACK CANS	10,557.50	1,571.50	\$19.48	\$0.00	\$10,896.22	\$1,565.26
BEST BEER LT 18 PACK CANS	2,319.75	168.00	\$12.96	\$0.05	\$10,194.46	\$3,256.81
12.90	2,068.75	194.50	\$12.90	\$0.00	\$9,090.40	\$2,334.89
13.52	231.00	191.50	\$13.52	\$0.00	\$1,104.06	\$923.92
SAFEWAY #1 95	45.00	45.00	\$13.51	\$13.51	\$215.06	\$215.06
SAFEWAY #1 92	41.25	41.25	\$13.52	\$13.52	\$197.14	\$197.14
SAFEWAY #1 250	37.50	37.50	\$13.52	\$13.52	\$179.22	\$179.22
SAFEWAY #1 419	37.50	37.50	\$13.52	\$13.52	\$179.21	\$179.21
BOUL'S #1 683	37.50	37.50	\$13.52	\$13.52	\$179.27	\$179.27
BOUL'S #1 875	15.00	15.00	\$13.52	\$13.52	\$71.69	\$71.69
SAFEWAY #1 86	9.75	9.75	\$13.52	\$13.52	\$46.61	\$46.61
SAFEWAY #1 213	7.50	7.50	\$13.52	\$13.52	\$35.85	\$35.85

## 1. Analysis: choose the "Comparative"

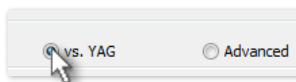


Use the Numbers/Graph Toggle if you are not already in a grid view

## 2. Time-frame: Select most recent week, MTD, YTD, or any other time-frame.



Select another period to compare against (YAG or Advanced).

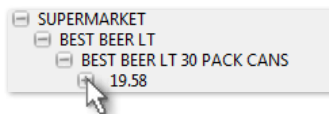


## 3. Context: Select sub-groupings

(up to five levels to show market type/channel, brand, product, price, and customer)

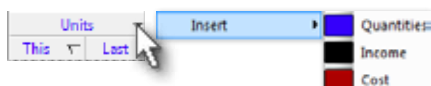


Expand desired groupings.

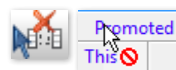


## 4. Metrics: volume, price, margin

Insert

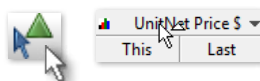


Delete



Difference / %change

To make it easier to find price change occurrences



## 5. Save bookmark: Bookmarks > Add Bookmark

# Advanced Concepts

**Key lists:** list out key members (customers, products, etc.) from any analysis type.

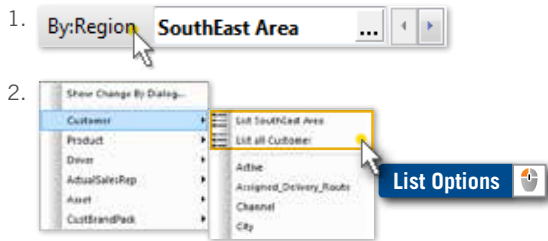
Total Customer: 2,472						
	Customer	Customer	SalesRep	This	Last	Units
11628	VILLAGE NORTH #1022-01/1022SR	SEL N BLMORAGT	Tanner, Michael	8,073	5,82	
11801	VILLAGE NORTH COLM ST	B BROSSETT	Alan, Chris	7,830	5,84	
11598	FINE HOST / DROP SHIPMENT	HE STINA LANE	JA Office Jason	7,287	6,10	
20499	S NEWBURG DIST # 715	323 STATE RT 261 RD	Angley, John	7,158	6,35	
20481	S NEWBURG DIST # 13555	289 SADDLE ST	Yates, Brad	6,827	6,37	
20483	S NEWBURG DIST # 24867	41 CHAMBERS RD	Coan, John	5,219	4,91	
20489	S NEWBURG DIST # 925	18 MORRIST	Johnson, Louise	4,726	3,82	
11808	VILLAGE NORTH ST	500 S VILAGE EAST	Bank, Jim	4,590	3,87	

Customer List

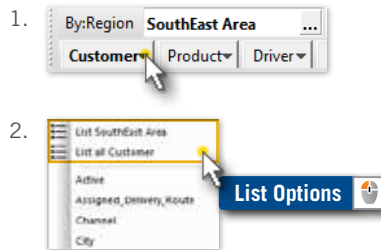
Total Product: 372						
	ProductDescription	Type	LOC_Code	This	Last	Remaining Units
8133	12PK CN Our Cola	Carbonated		37,812	30,148	30,138
8132	12PK CN Our DietCola	Carbonated		22,811	8,979	12,912
8134	12PK CN Our Name	Carbonated		11,948	7,580	11,983
8137	12PK CN Our Orange	Carbonated	998800284	2,736	1,900	2,769
8138	12PK CN Diet Lime-Lime	Carbonated	998800284	1,121	844	1,055
8135	12PK CN Our CF Cola	Carbonated		5,119	5,811	5,074
8136	12PK CN Our CF Cola	Carbonated		4,887	5,742	4,999
8139	12PK CN Our New Diet	Carbonated	800018023	1,152	1,209	1,128

Product List

To open key list (with key tabs off):



To open key list (with key tabs on):



## List options

List for one attribute grouping:

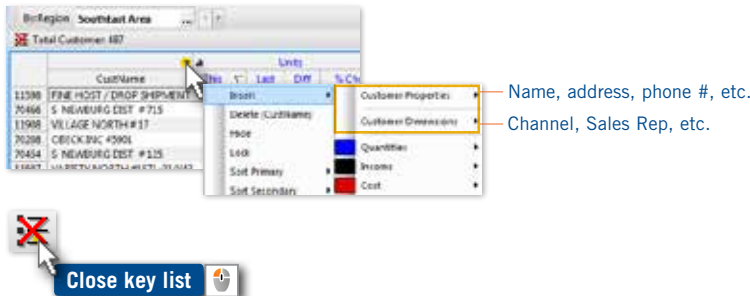
Only lists members with data for the selected grouping.

By:Region SouthEast Area			
Total Customer: 487			
	Customer	This	Last
11598	FINE HOST / DROP SHIPMENT	7,277	
20486	S NEWBURG DIST # 715	7,318	
11808	VILLAGE NORTH # 17	4,590	
20208	CHICK PAC #5901	8,611	
20454	S NEWBURG DIST # 135	2,934	

Lists all members with data.

By:Region (None)			
Total Customer: 2,472			
	Customer	This	Last
11628	VILLAGE NORTH #1022-01/1022SR	8,073	
11801	VILLAGE NORTH COLM ST	7,830	
11598	FINE HOST / DROP SHIPMENT	7,207	
20499	S NEWBURG DIST # 715	7,158	
20481	S NEWBURG DIST # 13555	5,827	

Insert multiple data fields or descriptions related to the list



To list information that relates to other parts of the business (like customer and product descriptions together in a consolidated view) utilize the line item analysis and filter first so that the results are a manageable list length.



# Advanced Concepts

**Of These:** “Of These” creates an automated exception listing or filter to show data for the members that pass or fail a numerical test. The results can be updated automatically using “dynamic” testing criteria to show the members that pass or fail on any given date within any subset of the data. This type of filter is only available for members at the lowest level (e.g., customers, products, assets, etc.).

1. Select and modify the view on which to base the Of These. See tips on the right.

2. Click on “Collections Plus/Of These”



3. Enter a name, pick a global or private folder.

4. Set the test level to a product or customer test. Then, use one or more criteria (for example, units < 1).

5. Save as criteria in order to automatically update the Of These collection by rerunning the test whenever you turn it on. Otherwise, the Of These stores a static list of members. For information on other settings, see the “SIM User Manual.”

Customer: Non-Buyers [Dynamic Date]		Modifiers: Calendar Days		
✖ Total Customer: 343				
	CustName	This	Last	Units Diff
91838	CORNELL UNIVERSITY	0	400	-400
70813	FAIRE DISTRIBUTORS # 8405	0	254	-254
10637	STRICKLAND BEV	0	214	-214
02893	CORNELL UNIVERSITY VENDING	0	208	-208
04194	FAIRE DISTRIBUTORS # 0595	0	188	-188

## Tips:

- In general, we recommend removing all filters before creating the Of These collection.
- Select the initial date settings (for example, three months) before creating the Of These collection. Depending on the settings, this date range may dynamically update based on the view when you turn on the Of These.
- Turn on or off equivalents as desired. The Of These stores the equivalent settings used when it was created.

**Of These - [Customer]**

Name: Non-Buyers Create In [Private] s

Filter Level Key: Customer Change Filter Level >

Exception Test

Single  Multiple

Data Type: Units

Test Type: Value (T)

Operator: <

Value: 1

Passed In: All Periods (In Total)

Options <

Options

Context: By Channel Change Context

Limit To: No Additional Filter

Save As: Criteria

Date Options

Dynamic Date  Use current date

Most Recent

Most Recent Complete

Fixed Date ME 1/2011 vs. YAG

Start Date: Adjusted

OK Cancel Help

# Advanced Concepts

## Of These - continued

### Examples

Same Store Sales (i.e. active this year and last):

Of These - [Customer]

Name: Same Store Sales

Filter Level: Key: Customer

Exception Test

Single  Multiple

Data Type: Units

Test Type: Value (Both Time Frames)

Operator: >=

Value: 1

Underperforming customers:

Under-Performing Customers

Name: Under-Performing Customers

Filter Level: Key: Customer

Exception Test

Single  Multiple

Data Type: Units

Test Type: Difference

Operator: <

Value: 0

New customers:

New Customers

Name: New Customers

Filter Level: Key: Customer

Exception Test

Single  Multiple

Units > 0  
AND (Units(L) <= 0)

AND  OR

Add Edit

# Advanced Concepts

**Note:** MultiView needs to be enabled for each user in the admin utility

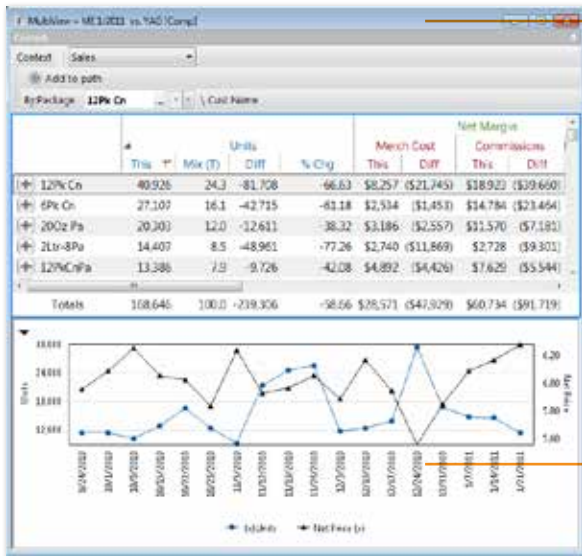
## MultiView

Control multiple analyses with a single context control in one window.

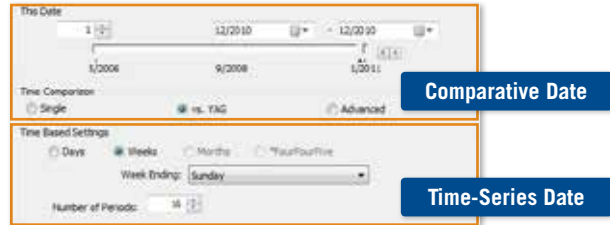
**Step 1:** Split the window (2 or 4 panes)



**Step 2:** Turn on MultiView



**Tip:** You can set two separate date ranges: one for comparative and one for time series.



**Comparative Date**

**Time-Series Date**

**Tip:** Click on a pane to activate it and configure settings.

With MultiView on, changing the context (drilling down, changing the focus, etc., updates all panes in the window.



**Turns off MultiView**

# Advanced Concepts

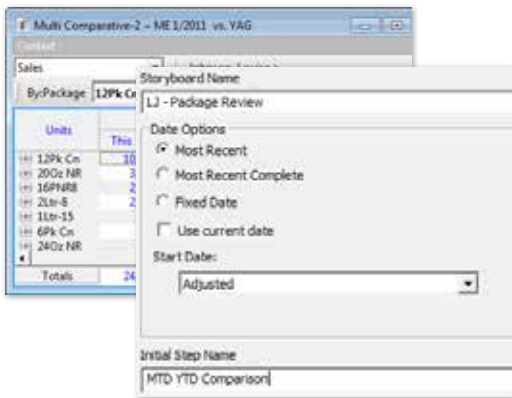
## Save & Share Intelligence

**Note:** Storyboards need to be enabled for each user in the admin utility

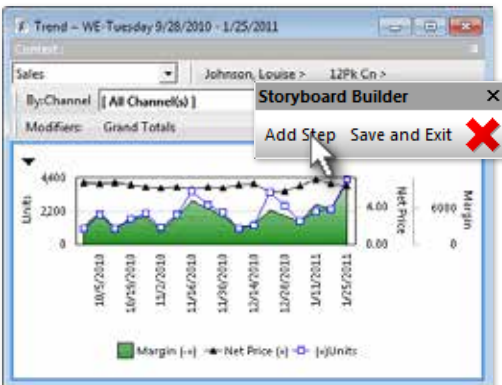
**Storyboards**—let users drill down through a set of views to identify root cause without needing to configure the context, analysis type, or other settings. Power users can create a storyboard to share. Users can open the storyboard and drill down on whatever item interests them.

### Create a storyboard

**Step 1:** Configure and save the storyboard starting point.  
(Options → Storyboard → Builder → Start)

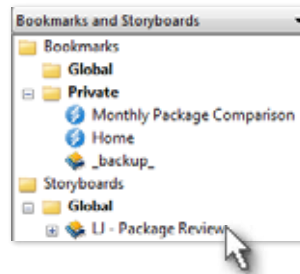


**Step 2:** Drill down, configure, and save next step...continue to end of storyboard.

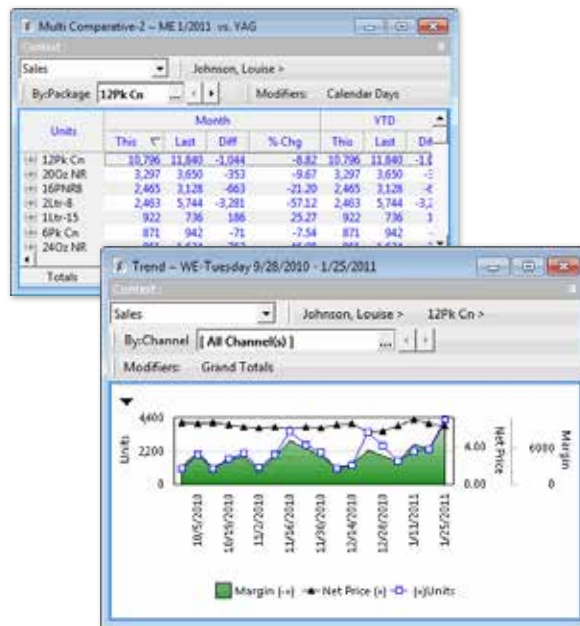


### View a storyboard

**Step 1:** Open storyboard.  
(View → Storyboard/Bookmark Panel)



**Step 2:** Double-click to drill down on any item/date.



# Advanced Concepts

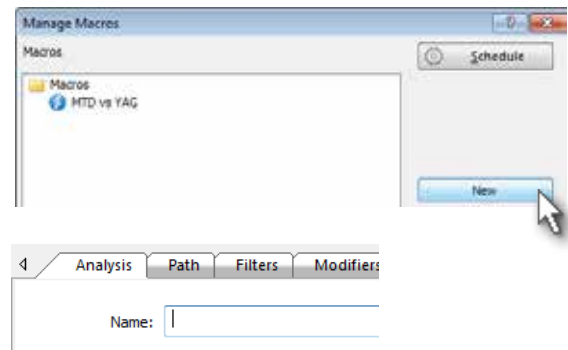
## Save & Share Intelligence

**Macros**—let users easily email, save, or print commonly-used results. Macros save nearly every aspect of any given view in addition to output settings such as email, and/or save as file (Excel, TXT, HTM, etc.). Users simply run the macro, either in SIM or as part of an automated process, in order to output results.

### Create a macro

**Step 1:** Configure the view to show the desired results (choose analysis, choose context, set timeframe, etc.). The macro results are based on the view that is selected when the macro is created.

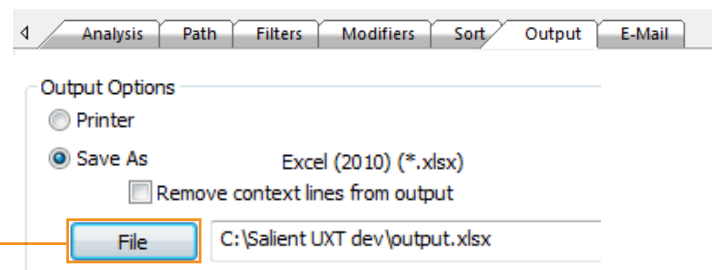
**Step 2:** Create new macro: Select [Options](#) → [Macros](#); click New.



**Step 3:** In the Analysis tab, type a macro name.

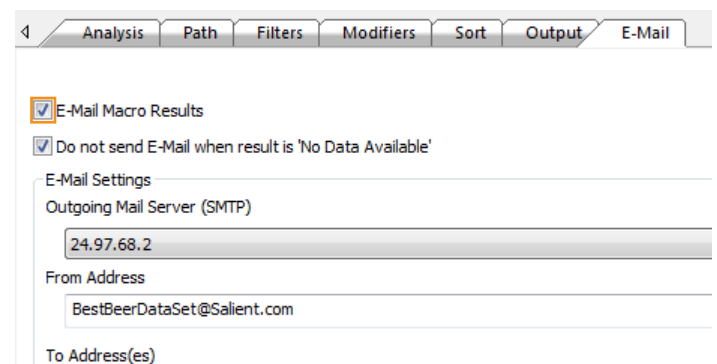
**Step 4:** Select Output settings. Click the Output tab. In the bottom of the dialog, choose to print or create a file (Save As). To email results, choose the Save As option and configure email options in the next step.

To select the file type, click the file button.



**Step 5:** Select Email settings (when emailing results only). Click the Email tab. (Tip: Contact your administrator if you do not see this tab. Some administrative setup is required.)

Check the Email Macro Results box and enter settings.



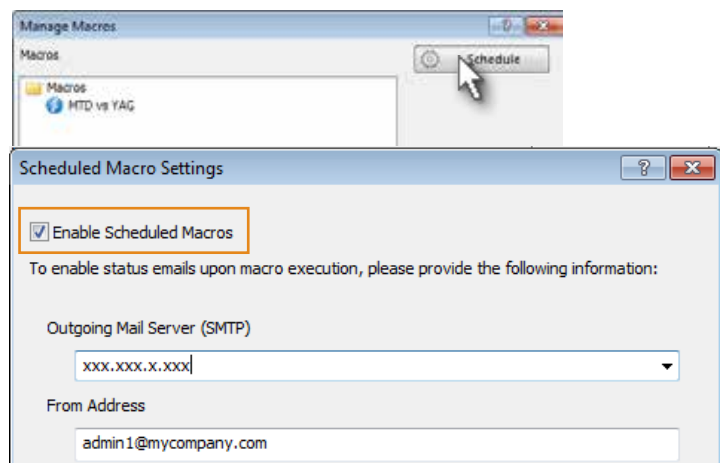
# Advanced Concepts

## Macros (continued)

### Automate/schedule macros

You can automatically run macros as part of scheduled tasks. The following setup is required:

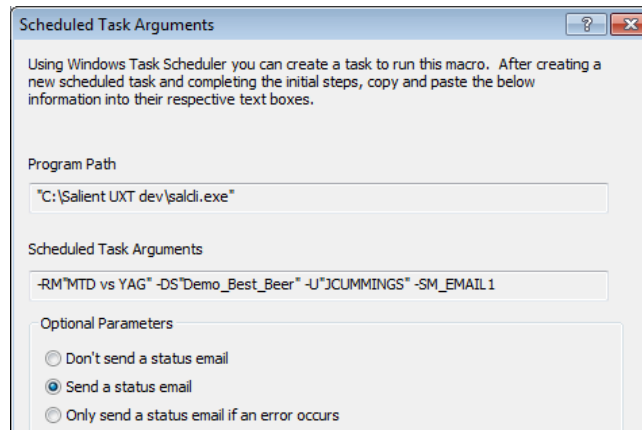
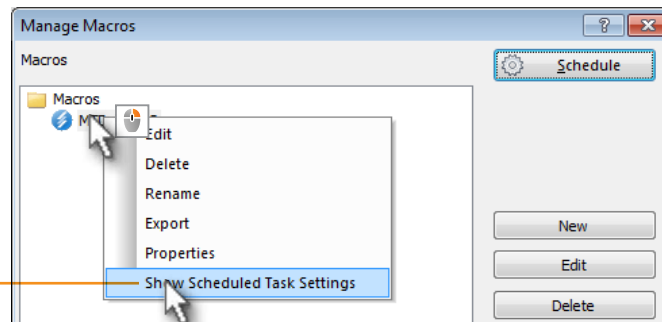
**Step 1:** If you haven't already, enable scheduled macros by clicking the Schedule button and checking "Enable Scheduled Macros."



**Step 2:** Enter settings for status emails sent for scheduled macros. Note that this is different than the settings for macro results emails (see previous page).

**Step 2:** In your task scheduling program, set up a task to run the macro according to your preferred schedule.

You can find the necessary information, including program path and scheduled task arguments by right-clicking on the macro and selecting Show Scheduled Task Settings.



**Knowledge Manager** enables users to organize thoughts or “soft knowledge” for collaboration.

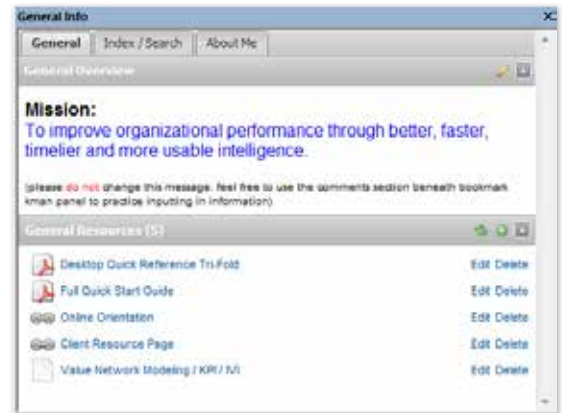
Each section of the panels contains text, file or object entry tools.

**The General Info panel has three tabs:**

**General:** adds global information available to most users

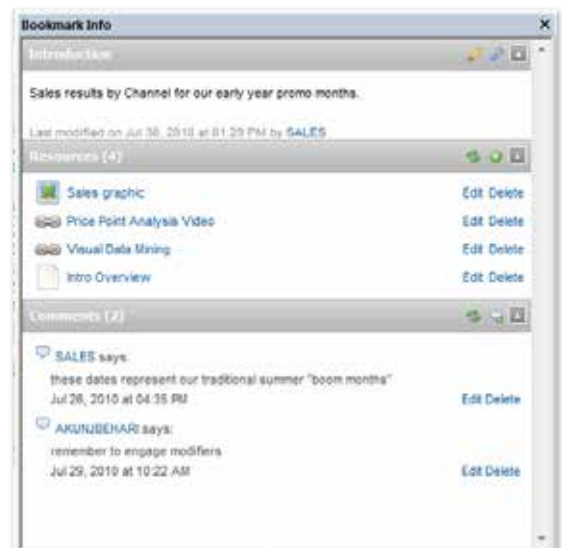
**Index/Search:** adds searchable information such as a glossary of terms

**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 to write a description and purpose for the bookmark.**

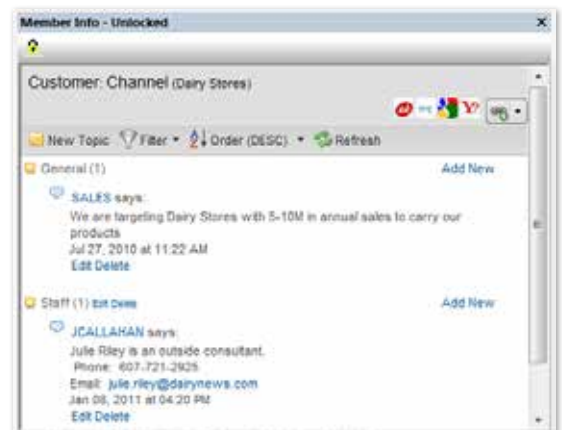
Resources (links to web pages, pictures or documents) or comments can be included as future reference materials become available.



**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.



## 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).