SALIENT® MANAGEMENT COMPANY

October 6, 2021

Salient Dashboards™ Training Guide

for Dashboard Viewers/Power Viewers

Version 7.80

Limited warranty

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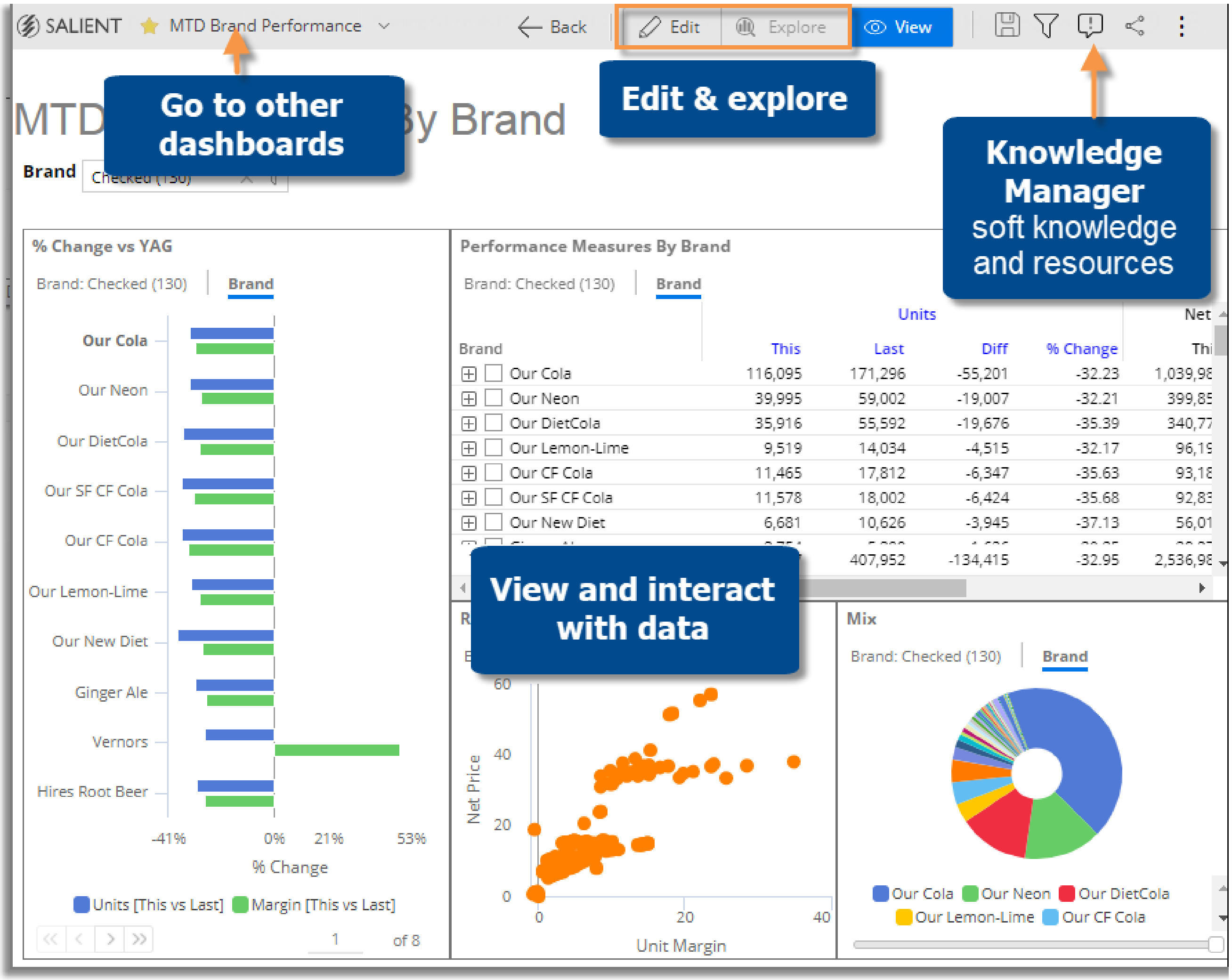
About Salient Dashboards

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

Like Salient's other applications, dashboards start with UXT® technology, which transforms huge volumes of data into a highly-optimized analytical data mart. Salient Dashboards provides role-based access to dashboard building, viewing, and exploring capabilities. Dashboard Designers can create and publish dashboards in "edit" mode using a variety of widget types (Comparative, Trend, Scattergram, etc.) and options to provide the exact information users need—from an overview of the entire organization down to a single fact. Users can then view and interact (see page 11) with the customized dashboards. Power Viewers and Dashboard Designers can go on to perform their own data investigation in "explore" mode (see page 42). Portal dashboards (see page 8) provide easy access to dashboards. In addition, a mobile application is available to provide access on mobile devices.



About Power Viewer

Power Viewer is an enhanced licensing option that provides the following capabilities beyond basic dashboard viewing.

Advanced capabilities in view mode for Power Viewers:

- Select measures using the measure selection tool (i.e. show/hide). (Multiple measures must be pre-configured and measure changing must be enabled for the widget.)
- Use the breadcrumb path to select the By and, therefore, follow a flexible drill path. (Multiple Group Bys must be pre-configured and the breadcrumb path must be enabled for the widget.)
- Use advanced date options such as fixed or moving timeframes and offset time periods. (The date icon must be enabled for the widget.)
- Access setup options for Geo.
- Change display names of measures and measure families in Trend, Comparative, and Multi Comparative graphs (actual value only).
- Save dashboards (as private and/or published depending on user account settings).
- Turn on and create collections (private and/or global depending on user account settings).

Further investigation in explore mode:

Power Viewers have access to explore mode (see page 42) where they can expand a widget to further investigate the data. Explore mode allows users to change the analysis type, add measures beyond those built into the dashboard, group the data by any available attribute, and more. Note that explore mode may be disabled.

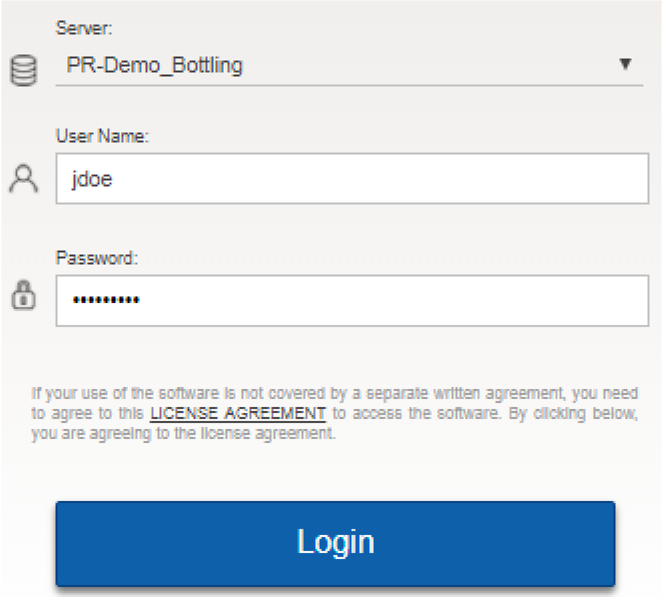
Getting started

Log in

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

To log in

1. In your web browser, go to the address of the Salient Dashboards login page.
2. From the **Server** menu, select a dataset.
3. For classic login (i.e., credentials entered directly in Salient Dashboards), enter your user name and password. Then, click **Login**.



External/SSO authentication: Click the **SSO Login** button. If you are not already logged in, the next screen will allow you to enter your user name and password and **Sign in**.

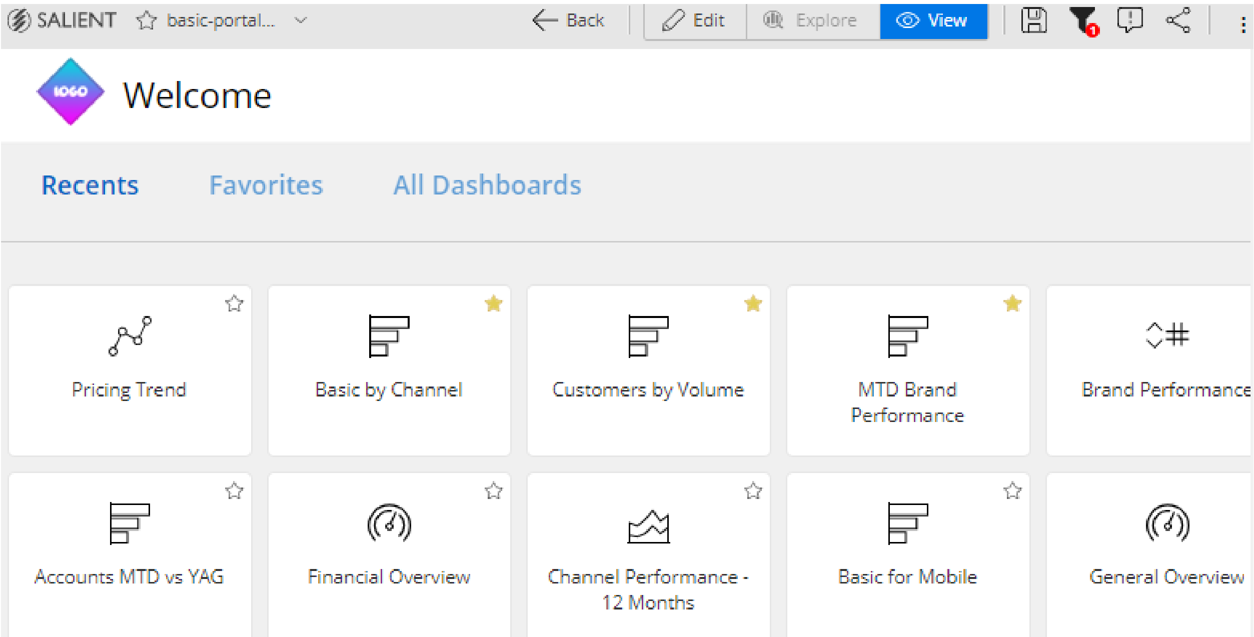
LDAP login (i.e., machine login used for authentication): The user name and password entries may not be needed.

Tips:

- The portal dashboard (see page 8) opens after login unless you have entered a URL for a specific dashboard or changed the home page in user preferences.
- In general, Salient recommends Google Chrome™; however, other browsers are supported.
- A dataset may be configured for a specific language. In this case, the login page will immediately switch to that language after it is selected.
- The first login is typically the slowest due to the downloading and caching of application files.
- Do not attempt to log in to the same dataset more than once at the same time using the same user ID. Multiple logins are not supported.
- You can log out at any time by clicking ⋮ in the upper-right corner of the dashboard screen and selecting **Logout**.

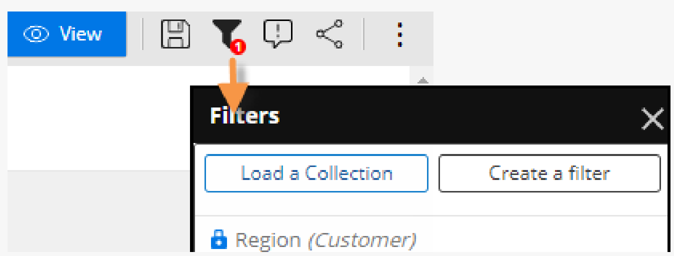
Portal dashboard

After initial login, you typically see a portal dashboard that provides fast and easy access to dashboards. Salient Dashboards come with a default portal dashboard, which your organization can customize. A portal dashboard has buttons or links to open dashboards. The links may be organized into tabs (e.g., recent, favorite, all, etc.).

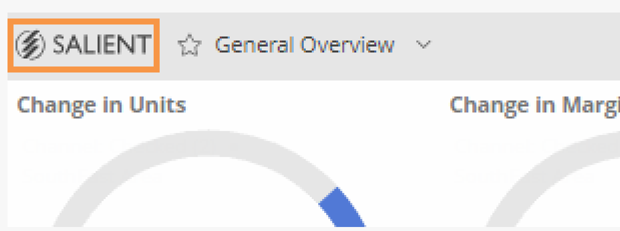


Tips:

If workspace filters are applied, the filter button at the top of the screen has a red icon. You can open the filter panel to see which filters are on.



You can go to the portal from any dashboard by clicking **Salient** in the upper-left corner.

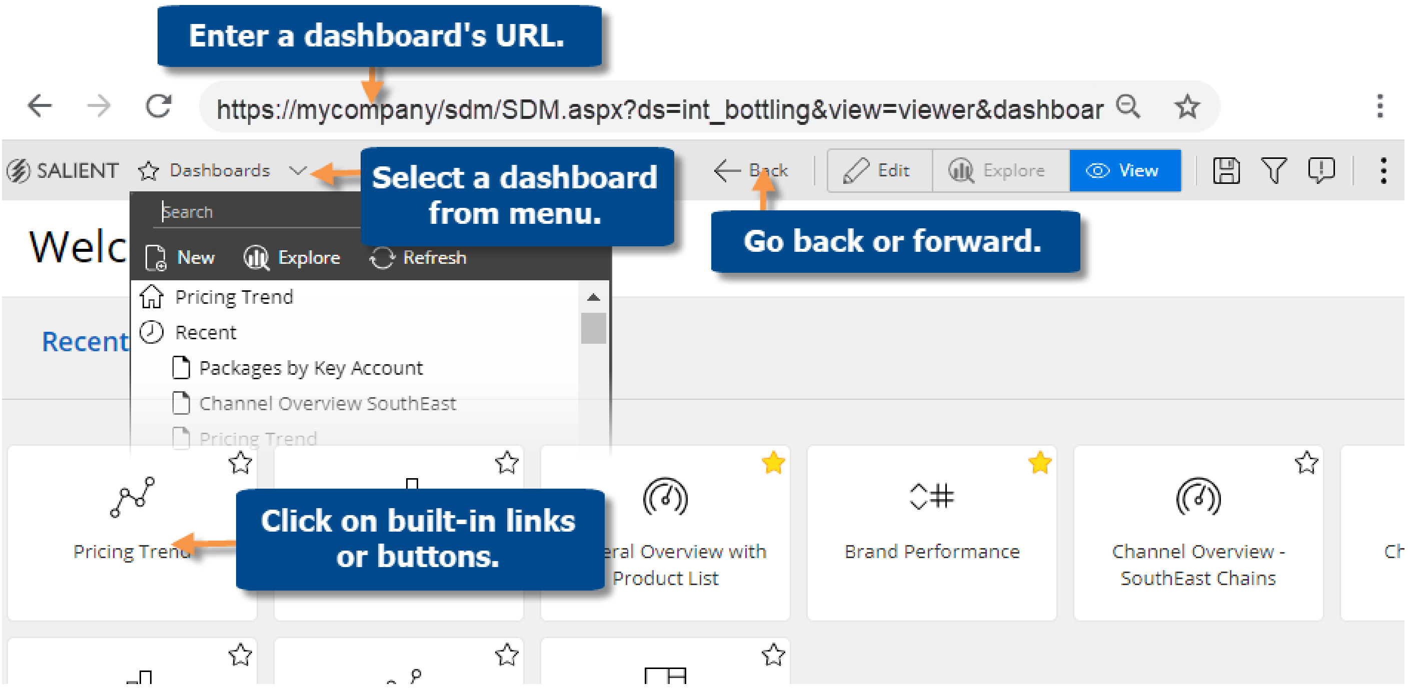


If you wish, you can bypass the portal to go directly to your home dashboard upon login. This option is available in user settings.

User account settings control which dashboards are available: only published dashboards for regular dashboard viewers; published and private dashboards for Power Viewers.

How to open a dashboard

In a browser window: Use any of the following methods to open a dashboard.



Built-in links	Click on buttons, links, icons, etc., in the portal or other dashboards.
Dashboards menu	Open the dashboards menu at the top of the screen and then search for a dashboard or locate it by category and folder. Click on the dashboard name to open it.
URL	Go directly to a specific dashboard by entering its URL or marking it as a favorite in your browser. This may be the dashboard's permanent URL or a temporary URL created by sharing a dashboard (see page 58).
Back & forward buttons	Go back and forward to dashboards you visited within a Salient Dashboards session. Click the browser's back and forward buttons or use the back button in the dashboard toolbar. Note that the history is cleared when you go to another page.

In the mobile app:

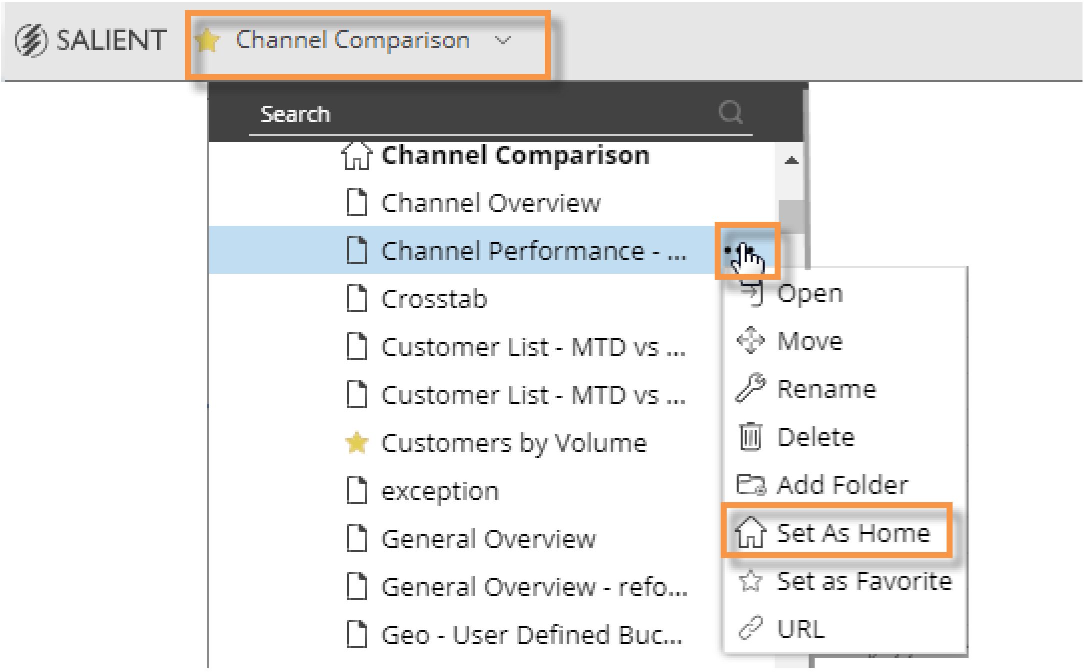
Optionally, access dashboards through the mobile app for optimal viewing on mobile devices. Additional installation and setup are required.

Select the home dashboard

You can select a home dashboard to make it easy to access. The home dashboard will appear at the top of the dashboards menu. In addition, you can change user preferences to go straight to the home dashboard upon login.

To select the home dashboard

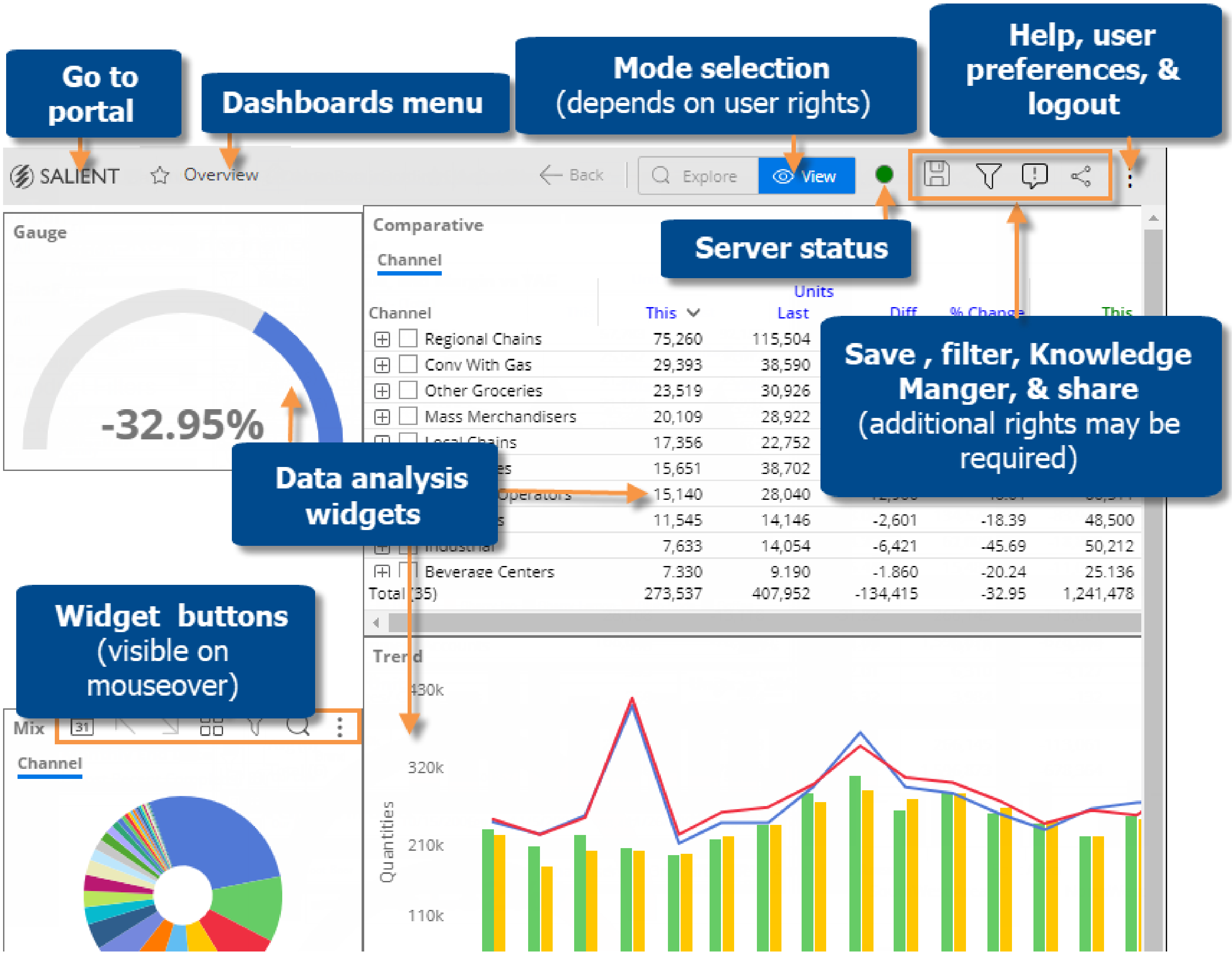
1. Click the drop-down at the top of the screen to open the dashboards menu.
2. Locate the dashboard and place the mouse over it.
3. Click the ... button that appears.
4. In the pop-up menu, select Set as Home.
5. If prompted, click **Yes** to confirm the change.



Tip: You can also make a dashboard the home dashboard when you save it.

Salient Dashboards screen

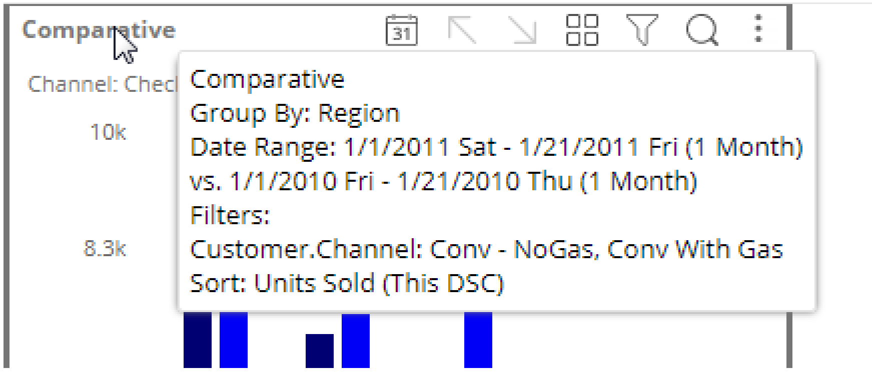
Opening a dashboard typically takes you to view mode, where you can interact with the data and navigate to other dashboards. Depending on your user rights, you may be able to go to edit mode where you can edit the dashboard, or further investigate any widget in explore mode (see page 42).



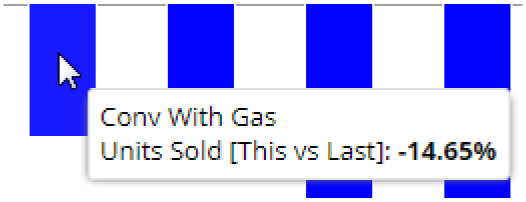
Tip: The server status icon displays for a short time after opening a dashboard and when the server status changes (● = active server; ● = suspended server). You can mouseover either of these icons to see when the last data update occurred.)

Dashboard tooltips

It is important to understand what data you are looking at in each widget. For example, you should know if you are viewing data for a particular region or the entire organization. Mouse-over tooltips are available to show you information about the By, date range, sort, filters, and more, for each widget. To see the tooltip, place your cursor over the widget title bar.

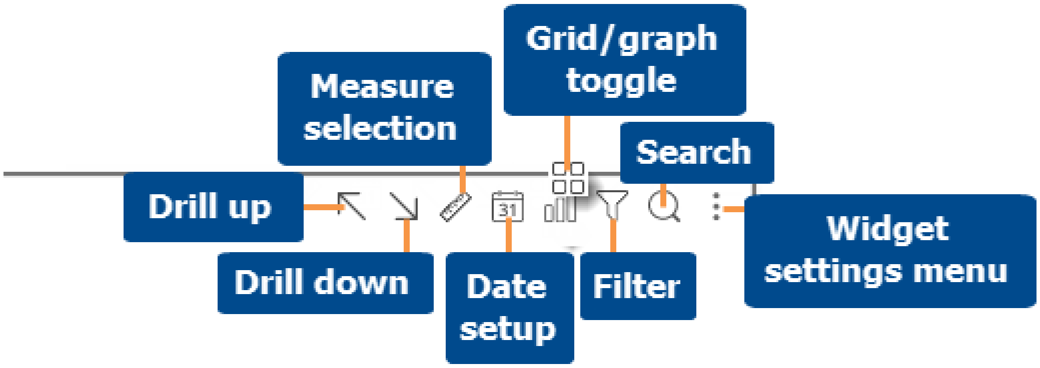


You can also view information about specific items within a widget by placing your cursor over the item. (Some mobile devices may not support mouse-over tooltips.)



Widget buttons

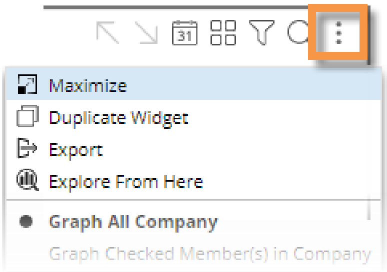
The widget toolbar buttons in the widget's upper-right corner (on mouseover) let you change and interact with the widget.



- Measure selection requires Power Viewer licensing or higher. In addition, the widget must include multiple measures.
- Date setup, grid/graph toggle, and filters may be disabled for view mode.
- Drill down is only enabled if the widget has multiple "Group Bys" and you have selected or checked at least one member.
- Drill up is only enabled if the widget has at least one downlevel filter.

Widget menu

You can click ⋮ in the upper-right corner of a widget (visible on mouseover) to open a menu. The available options depend on your rights, dashboards mode, and the widget type. For example:



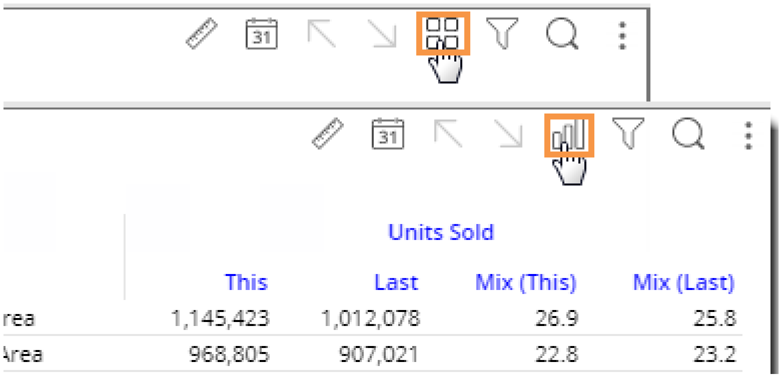
- Maximize - Enlarges the widget to the maximum extent of the dashboard.
- Restore Down - Returns a maximized widget to its original size.
- Duplicate Widget (see page 51) (not available in view mode) - Create a widget exactly like the original. In explore mode, the widget will be expanded in a new tab.
- Export (see page 59) data to UXT, Excel, or CSV (if enabled)
- Explore From Here - Expand the widget in explore mode (see page 42), which maximizes the widget and provides capabilities for data analysis and investigation (e.g. change analysis type, add measures, etc.).
- Notify - Create rules for sending data-based notifications (additional rights required).
- Graph options - Graph all, graph checked, percent change, actual value, etc. (affects graphs only)
- This and Last, This Only, Last Only (affects graphs only)
- Axis Management (for Trend, Comparative, and Multi Comparative graphs)
- Doughnut, Funnel, Pie, Stacked Area, Line, Vertical, Horizontal, etc. (i.e., graph type)
- ✕ - Close Widget (not available in view mode)

Switch between grid and graph formats

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

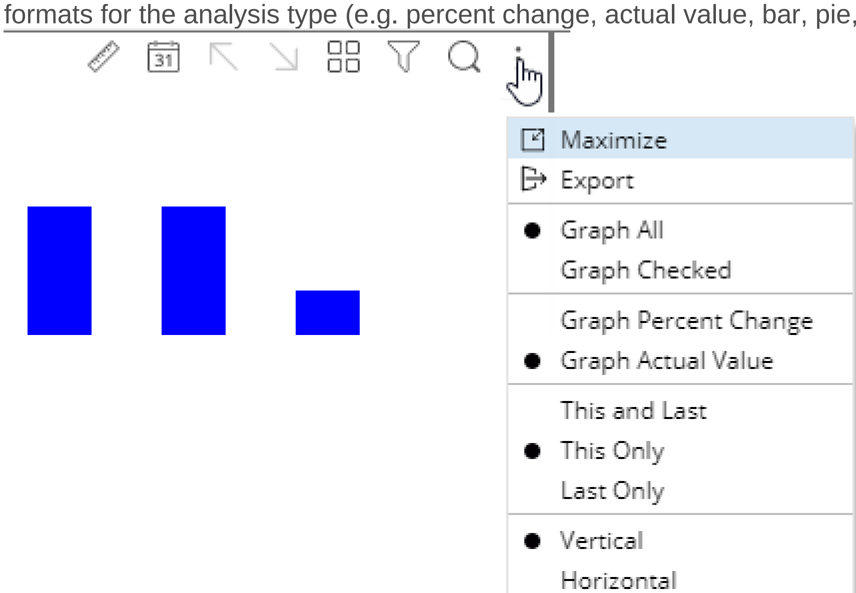
To toggle between a grid and a graph

On the title bar of the widget, click (visible on mouseover) to change from grid to graph or to change from graph to grid of numbers. (This button may be deactivated.)



To select a graph format

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



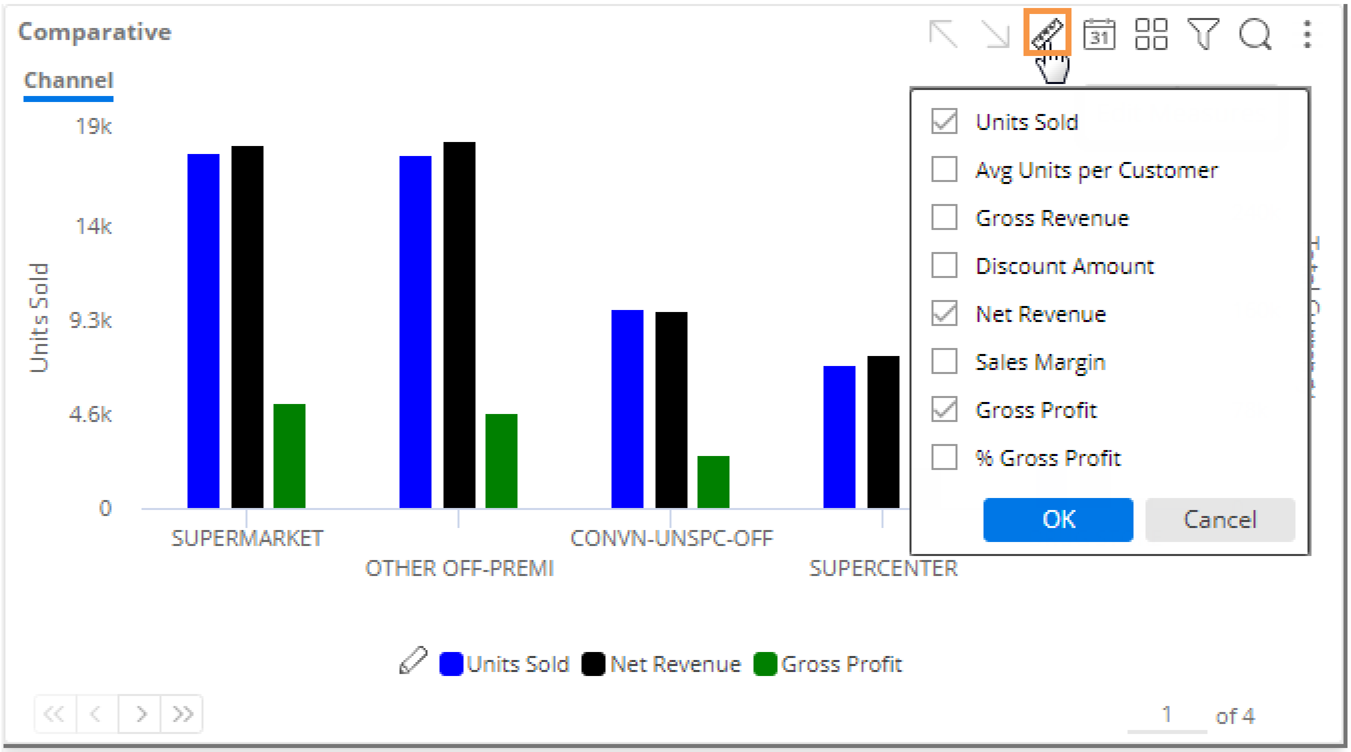
Tip: If the widget uses custom programming (i.e., custom view), the graph/grid button is not available.

Select measures

If a widget includes multiple measures, users may be able to select which measures to show or hide at any given time using the measure selection tool. (This tool may be disabled by the Dashboard Designer.)

To select measures (Power Viewers only)

1. On the widget title bar, click the button.
2. In the pop-up window, check the boxes of the measures to show and clear the boxes of the measures to hide. Only measures that have been added (see page 44) to the widget in during dashboard creation are available. To access a full list of measures, you can go to explore mode (see page 42) (Power Viewers only).
3. Click OK.



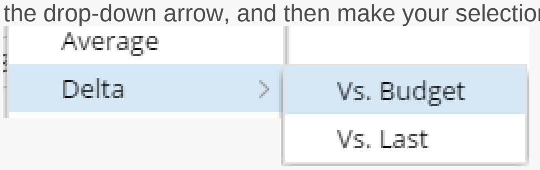
Insert difference and percent change

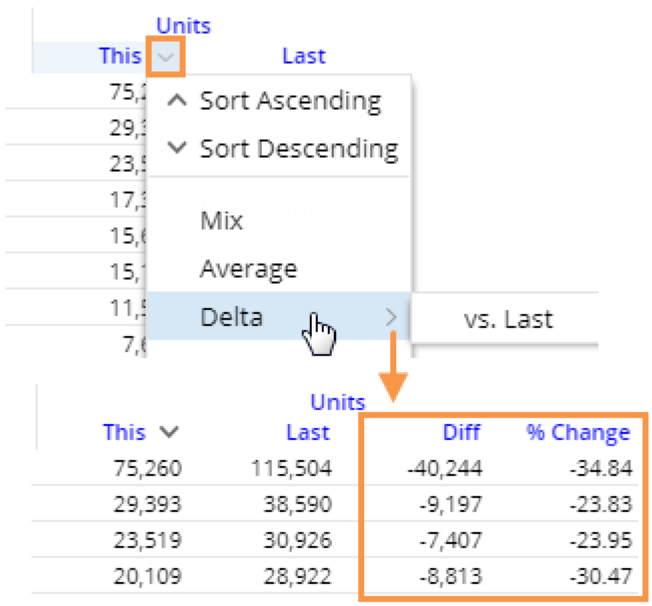
In grids that compare two date ranges, you can insert the difference and percent change.

To insert difference and percent change

1. Switch to the grid (see page 14) if you haven't already.
2. To add the difference/change percent (This-Last), place your cursor over the measure's This column, and click the drop-down arrow. From the pop-up menu, select Delta, vs. Last.

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



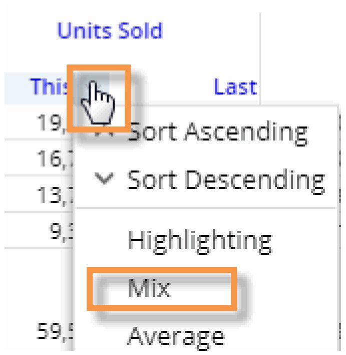


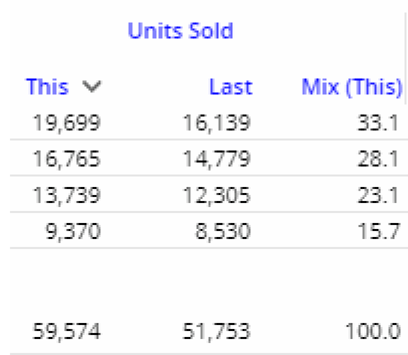
Insert mix

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

To insert mix

1. Switch to the grid (see page 14) if you haven't already.
2. Place your cursor on the column for which you want to add mix values. A drop-down arrow appears.
3. Click the drop-down arrow.
4. On the pop-up menu, select Mix.



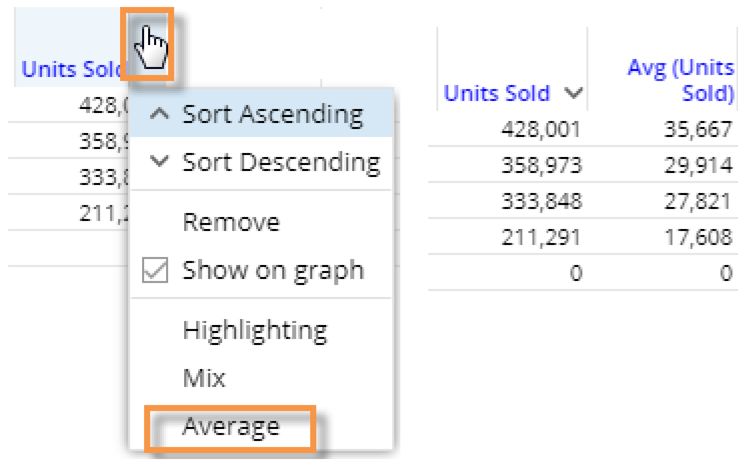


Insert average

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

To insert average

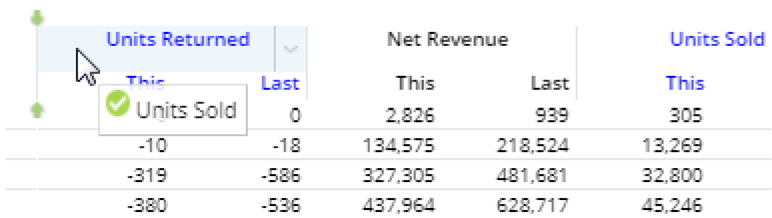
1. Switch to the grid (see page 14) if you haven't already. For the average column to be meaningful, the widget should show at least two units of time (days, weeks, months, etc.)
2. To add the average for This date range, place your cursor over This column; to add the average for Last date range, place your cursor over Last column.
3. Click the arrow that appears and then, from the pop-up menu, select **Average**.



Move measures

To move measures

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



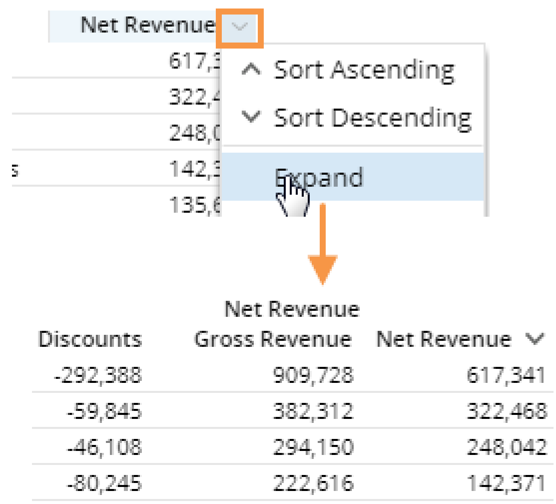
Expand a calculated measure

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

To expand a calculated measure

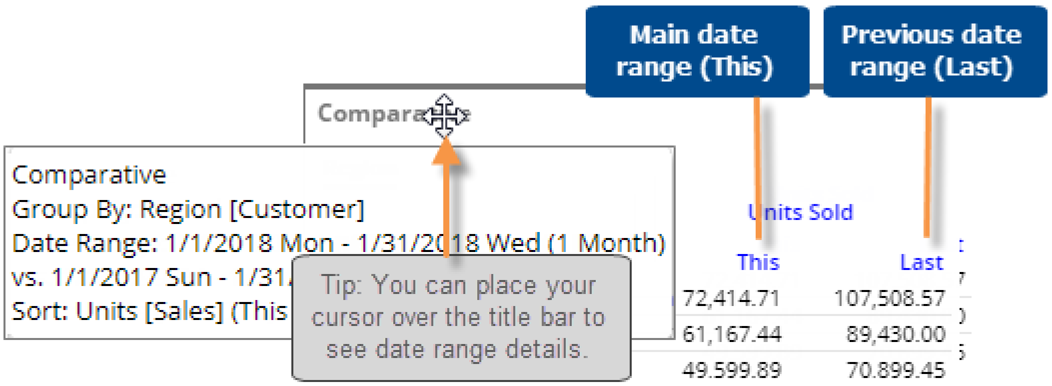
1. In a grid, place your cursor over the heading of the measure you want to expand and then click the drop-down arrow.
2. On the pop-up menu, select **Expand**.

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



Select the dates

Each widget shows data for a range of dates (days, weeks, months, etc.) that can update automatically over time. Date settings can be applied per widget and/or linked across multiple widgets, so that date settings update whenever the dashboard date changes. Some widget types allow comparison with a previous date range.

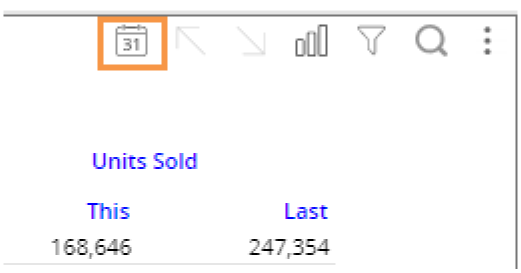


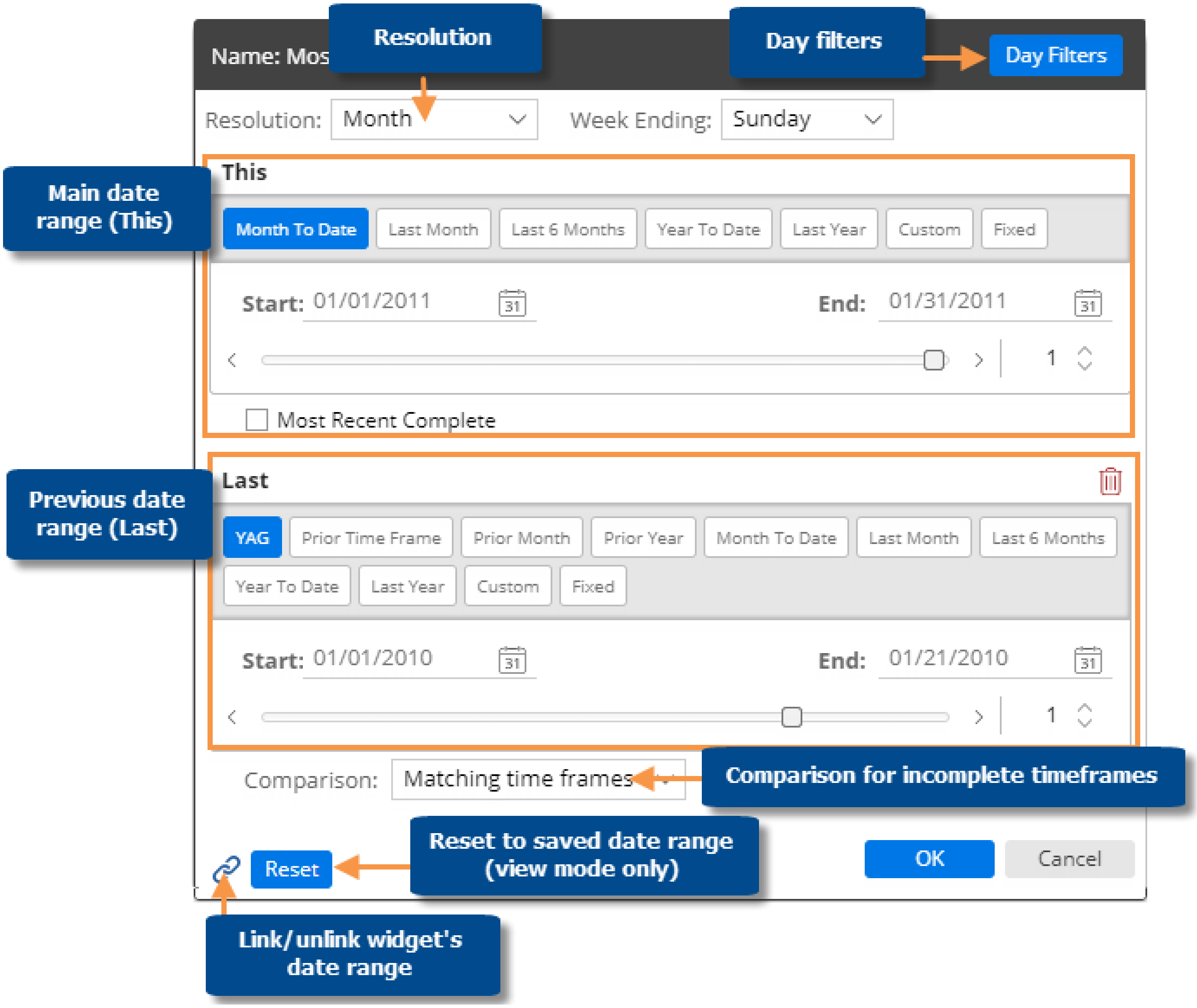
Date setup

If the widget has a date setup icon in its title bar, you can change its date range, including the resolution, number of dates, comparison date range, etc.

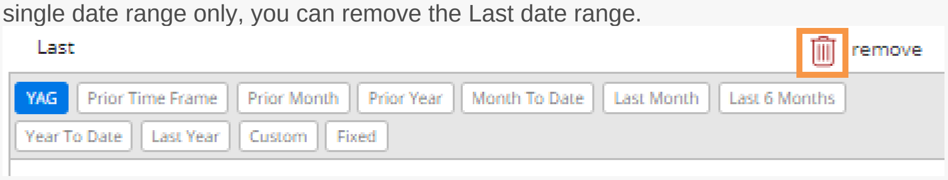
To select the date setup

1. Click the date setup icon in the title bar of the widget.
2. In the dialog, choose from the following date settings. The available options depend on the dataset and may be pre-configured by your administrator.





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

Option	Explanation
Comparison date range (Last) - optional	Under **Last**, click the button of the previous date range (e.g., YAG). The available options depend on the resolution selected above. If the dialog does not include a Last section, click Add Date Range at the bottom of the dialog to include a previous date range if desired. **Tip:** A comparison date range is optional in many widget types. If you want to look at a single date range only, you can remove the Last date range. 
Comparison for incomplete timeframes	A **Comparison** option at the bottom of the dialog controls the selection of the previous (Last) date range when This date range is incomplete. • **Matching time frames -** Adjust the number of days in Last date range to match the number of days in This date range for a precise view of gain/loss (i.e. how much better/worse are we doing). For example, compare March 1 through 15 of this year with March 1 through 15 last year. • **Complete last period -** Do not adjust the number of days in Last date range; instead show the complete last month or period for a gap or goal perspective (i.e. how much more to go). For example, compare March through 15 of this year with the full month of March last year.
Linked dates (i.e., use dashboard date)	Toggle the link icon at the bottom of the dialog to link or unlink the widget's date range, depending on whether you want the date range to update with the dashboard date. - indicates that the widget's date will update when the dashboard date changes. In view mode, the date ranges of all linked widgets update simultaneously when one of them is changed. - indicates that the widget's date range is unlinked and, therefore, has its own stand-alone date range.

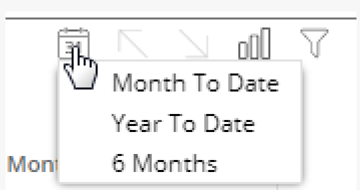
Tips:

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

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

To edit a date range for a Multi Comparative, click 31 in the widget's toolbar and then select the name of the date range.

Multi Comparative date ranges cannot be linked to other widgets.



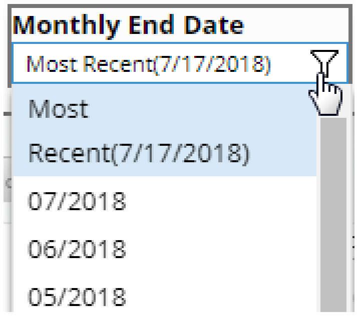
End date selection

A date selector allows users to choose the dashboard end date to shift the date ranges of multiple widgets across the dashboard at once. This type of date selection does not change the resolution (days, weeks, months, etc.) or number of dates in the date ranges.

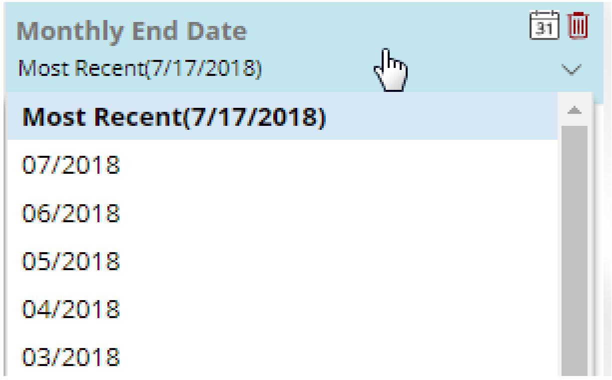
To select the dashboard end date

1. Click a date selector to open it. A date selector may be in the filters panel or within the dashboard as a separate widget, depending on the dashboard's setup. If the dashboard doesn't include a date selector in either of these areas, you can add one (see page 23).
2. Select a dashboard end date from the menu. This controls what is considered the current date or "today" and will, therefore, adjust dynamic date ranges relative to this date. Fixed date ranges and date ranges that are unlinked (i.e., do not use the dashboard date) are not affected by end date selection.

As a separate widget in the dashboard:



In filter panel:

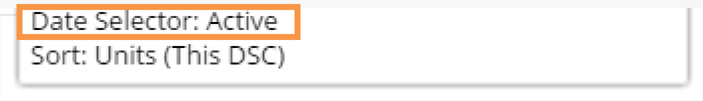


Tips:

If the resolution of an end date selector is different than a widget's date range, then Salient Dashboards will use an appropriate end date based on the selection. For example, if the date selector is monthly and a widget's date range is last week, the resulting date range is the last full week in the selected month.

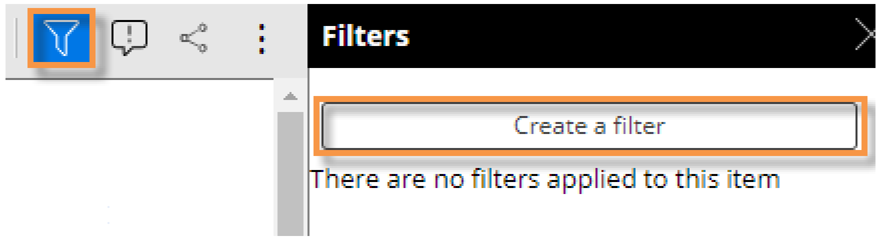
Depending on how it has been set up, the date selector may include a Most Recent or Most Recent Complete option.

A date selector can be selectively turned off for a widget in edit mode, so that it does not affect the widget's date range. You can see whether a date selector is active or inactive for a given widget by placing your cursor over the widget's title to see the tooltip.



To add a date selector to the filters panel

1. Click the at the top of the dashboard screen to open the filter panel.
2. Click **Create a filter**.
3. Click **Date**.



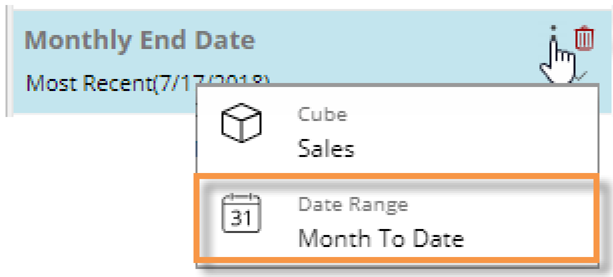
4. Set the dates that will appear as choices in the menu.

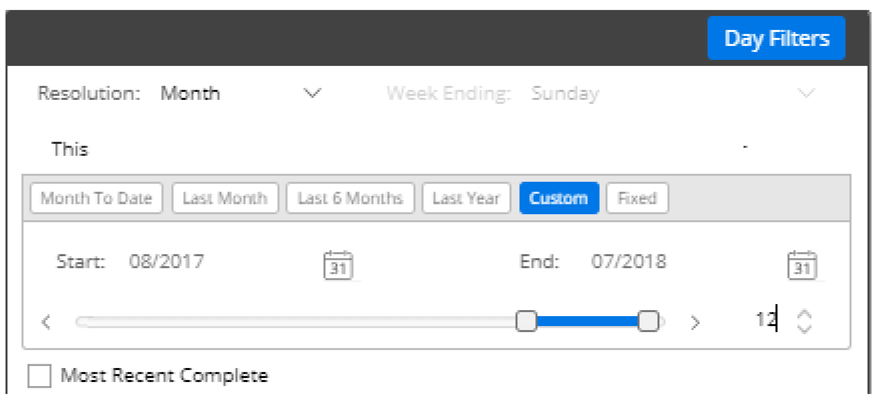
   i. Mouseover the date selector in the filters panel, and then click the ⋮ icon.

   ii. Click on Date Range.

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

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





Tips:

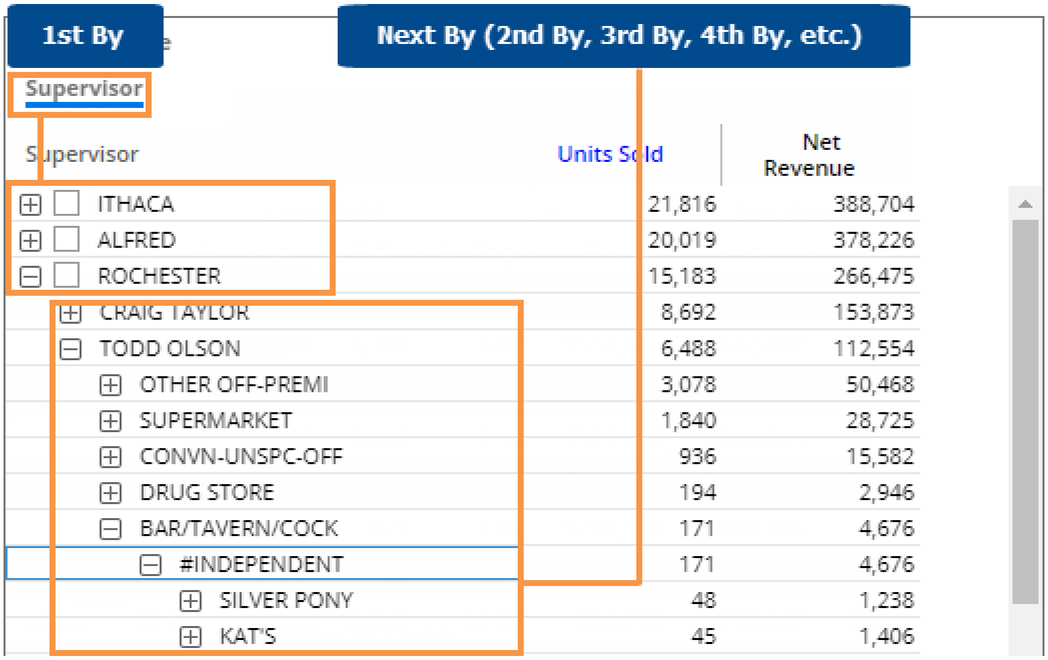
The selected date cube controls the available dates. You may need to change the data cube associated with the date selector to make the desired dates available.

In the Filter panel, this can be done by clicking the ⋮ icon and selecting **Cube**.

The date selector will affect all widgets that use the dashboard date (i.e., linked dates).

Group By attributes

You may be able to select how data is grouped (i.e. Group By) in widgets that compare members. The 1st By is the attribute used to group data at the highest level. Additional levels of attributes (2nd By, 3rd By, etc.) become visible as you expand members or drill down. In addition, you may be able to control the order of these attributes.



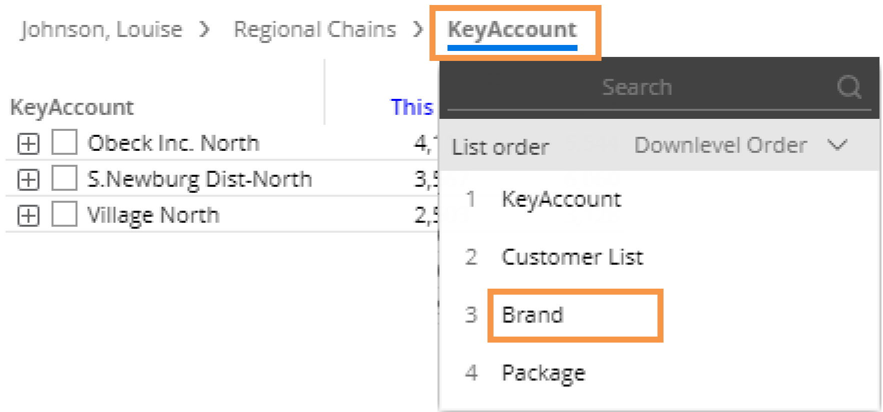
Criteria for Group By selection in view mode

- Only Dashboard Designers and Power Viewers can change the Group By.
- The widget must compare members.
- The widget must have multiple Group By attributes that were built in during dashboard creation. Only these attributes will be available for selection in view mode.
- The breadcrumb path must be <u>not</u> be disabled.

To change the By

only in widgets that compare members; Power Viewers only

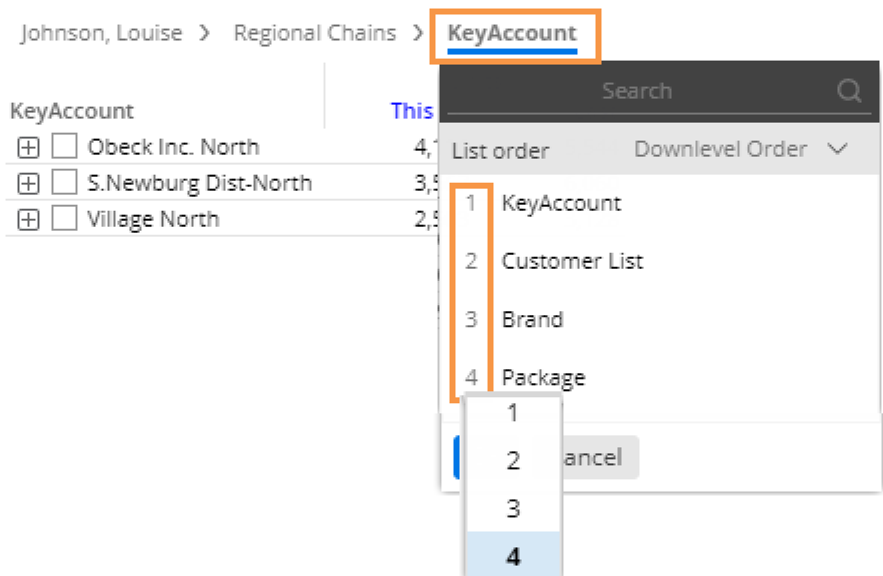
1. Click the By in the breadcrumb path (underlined).
2. In the pop-up dialog, click the name of the dimension by which to group the data.



To select the 2nd By, 3rd By, etc. (i.e. downlevel order)

only in widgets that compare members; Power Viewers only

1. Click the By in the breadcrumb path (underlined).
2. In the pop-up menu, click on a number and select from the drop-down to adjust the drill order, or click and drag to place attributes in the desired order.
3. Click **OK**

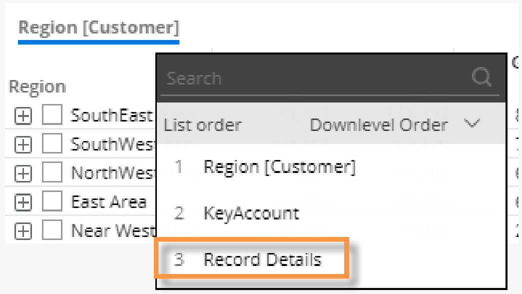


Tips:

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

Tips:

If the widget has a Group By named Record Details, you can select it to view record-level data (e.g., invoices, work orders, etc.).



If the dashboard includes a custom group, you can select it just like a regular dimension.

To access dimensions beyond those that were built into the dashboard, go to explore mode (see page 42) (Power Viewers only).

Expand members

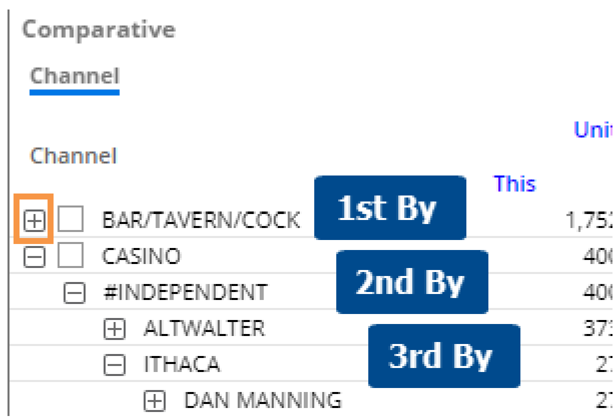
In grids that compare dimension members, you can expand one or more members to see subgroupings within them. You can expand the 1st By dimension to see the 2nd By, the 2nd By dimension to see the 3rd By, etc.

To expand members

Click the ⊞ button beside the member.

You can expand additional levels of data (e.g., 2nd By, 3rd By, etc.).

> **Tip:** The widget must have multiple Group By dimensions.



Tips:

You can choose the 2nd By, 3rd By, etc. using the pop-up menu in the breadcrumb path (see page 25).

The selected sort method (see page 27) determines the order within all By dimensions.

Check members

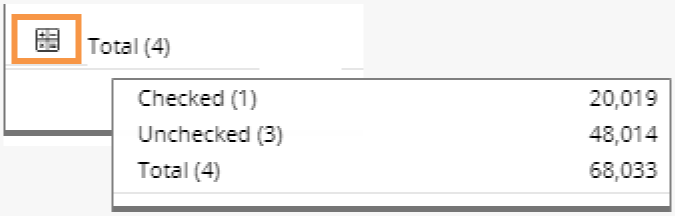
In grids that compare members, you can selectively checkmark any dimension members or key members to view their subtotals, drill down on them, show the checked members in graphs, and more.

To checkmark members

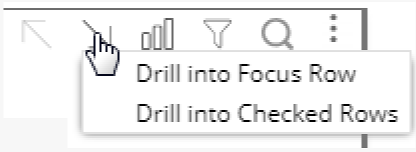
Click the ☐ box(es) beside the member(s).

Tips:

After checking members, you can view subtotals by clicking the subtotal button at the bottom of the widget.



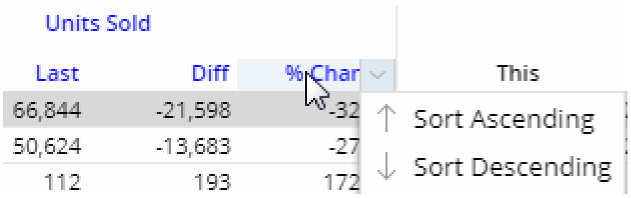
You can drill down on the checked members by clicking the Downlevel button and selecting Drill into Checked.



Sort

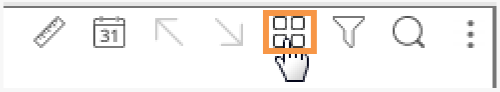
To sort

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

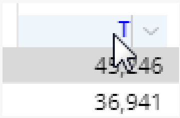


Tips:

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



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

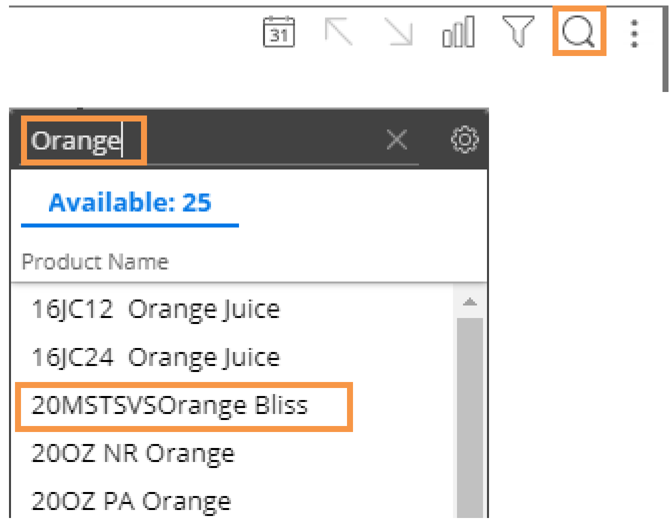


Search

You can perform a search to find specific items in a widget that lists multiple members. The search looks in the current page and any additional pages of data.

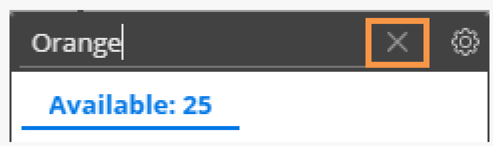
To search

1. Click the button at the top of the widget (visible on mouseover).
2. In the Search window, type some or all the characters in the item you want to find.
3. The window automatically returns a list of the member(s) that meet the criteria.
4. Click on the desired member to go to that item in the widget.

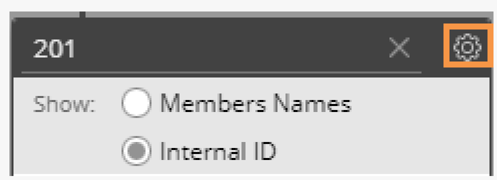


Tips:

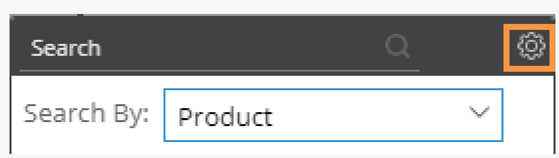
To reset the search, click the **x** button at the top of the Search window.



By default, the search looks for matching items based on their names. To search by code, click the button and choose Internal ID.



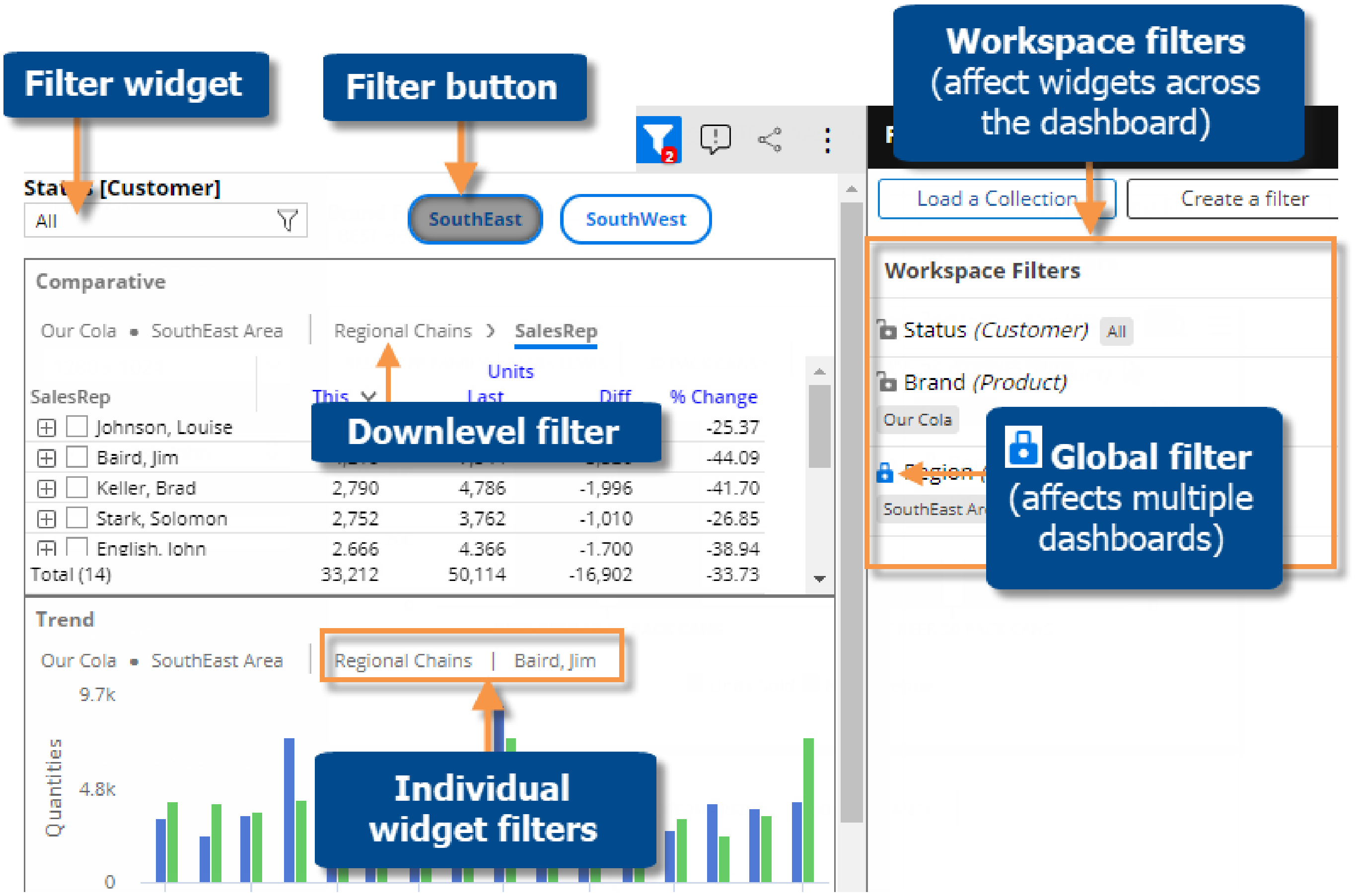
In key lists, the search uses the first description (e.g., customer name) by default; however, you can click the button to search by a different description or the key code. To search by the key code, select the name of the key.



The search returns up to a maximum number of results set by your administrator. You cannot page to results beyond this number.

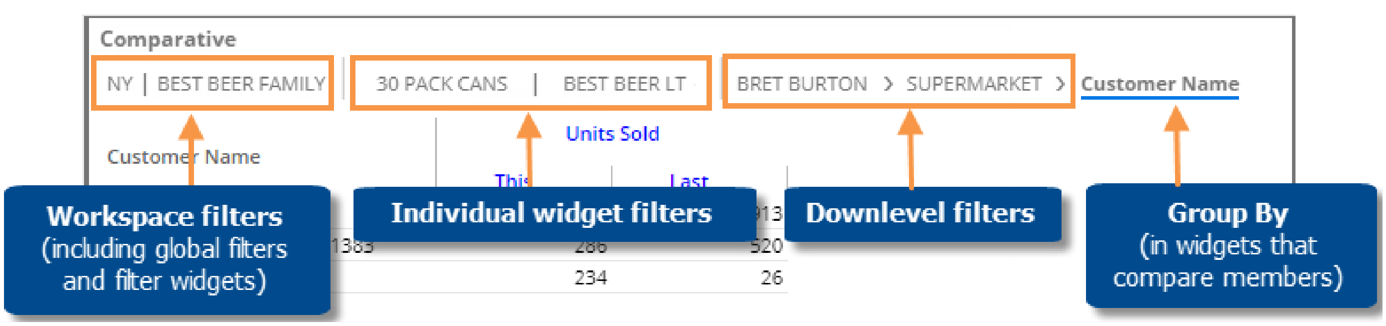
Filter

Filters allow you to narrow down on the exact information needed. Dashboards provide several ways to filter the data, such as global filters, workspace filters, and individual widget filters.



Breadcrumb path

The breadcrumb path at the top of the widget shows the filters currently applied. Just click on a filter in the breadcrumb path to edit or remove it.



Tip: The breadcrumb path does not show filters based on collections or user account rights. However, you can place your cursor over the title bar to see a tooltip that shows all filters.

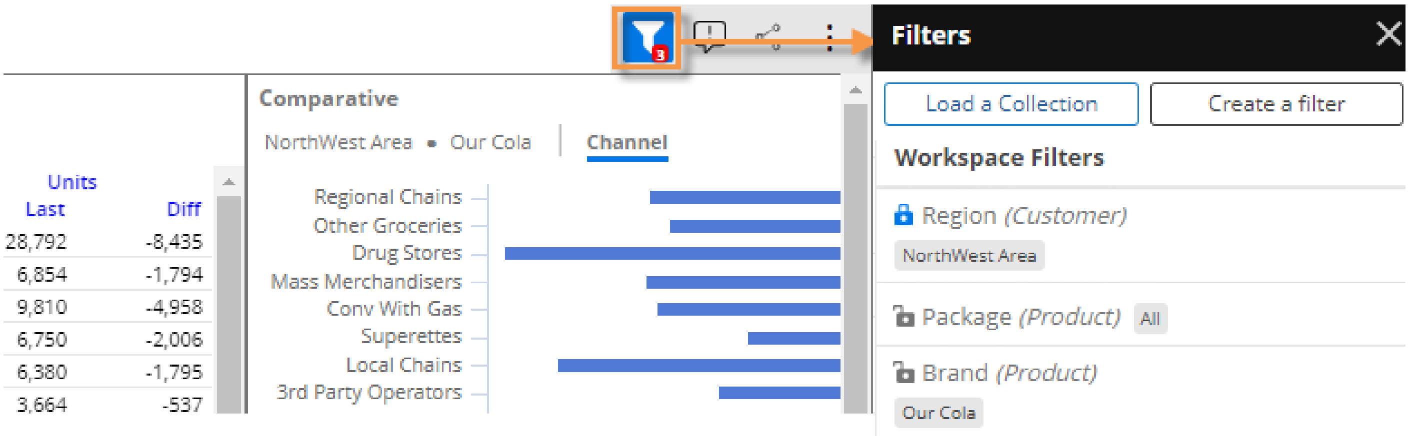
Workspace filters

A workspace filter affects widgets across the dashboard. A filter panel provides streamlined access to these filters. The panel may be disabled in dashboard settings.

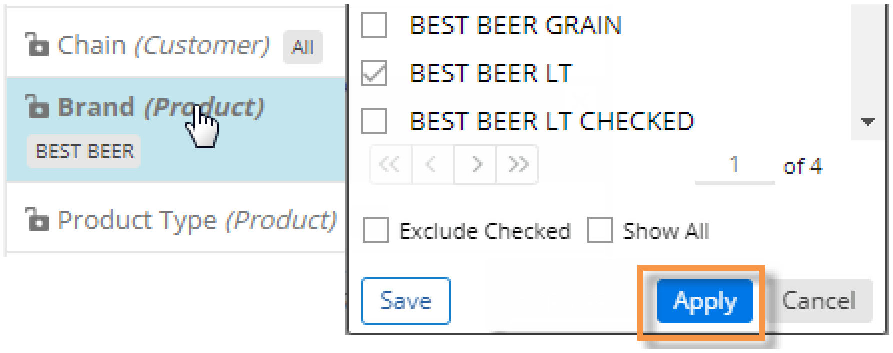
To use workspace filters

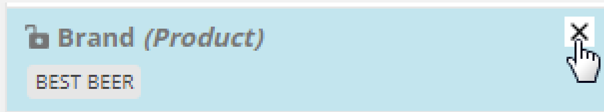
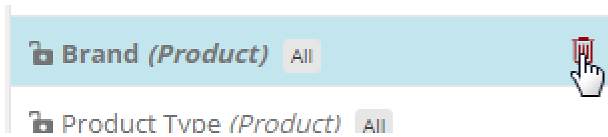
Click at the top of the screen to open the filter panel. This button is blue when the filter panel is open. The red number indicates how many workspace filters are currently on (does not include filters set to "All").

Tip: A contrasting symbol or means that at least one global filter (see page 33) is turned on.



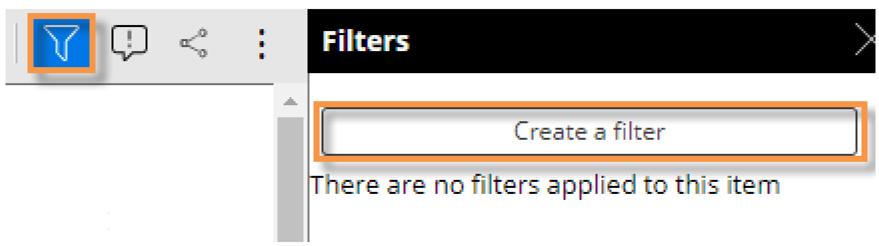
In the filter panel, choose from existing workspace filters or create a new workspace filter (see page 31).

Option	Instructions
Make a filter selection (e.g., select a different member)	Click on the workspace filter and make your selections in the pop-up window. Click **Apply**.  **Tips:** • By default, the window only shows members with data in the current context. You can click **Show All** in the dialog to list all members. • You can import a file (see page 38) to quickly filter on a list of members. Click at the top of the pop-up window to access this option.

Option	Instructions
Reset a filter	Place the cursor over the filter and click the **X** button. The filter will still be present but will show data for all members. 
Remove a filter	Reset the filter as explained above. Then, place the cursor over the filter and click the button. 

To create a workspace filter

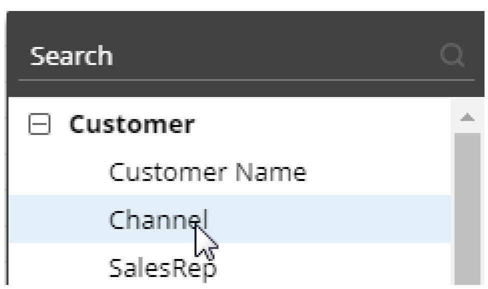
1. Click the at the top of the dashboard screen to open the filter panel.



2. Click **Create a filter**.

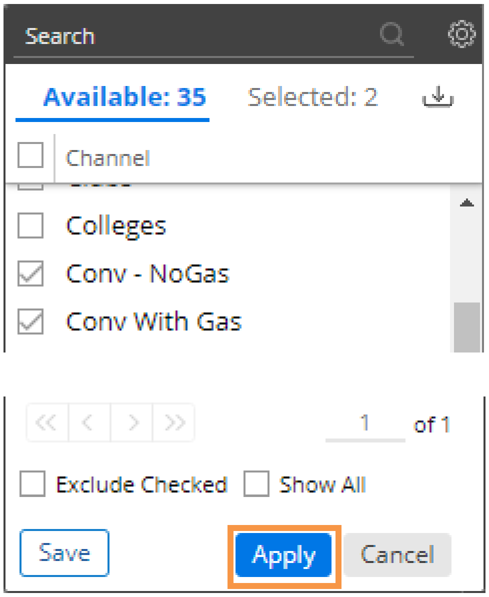
   For Power Viewers, a Load Collection option is also available to filter based on a saved collection of members (see page 36).

3. Select the dimension for which to create a filter. In view mode, available dimensions are limited to Group Bys for the current dashboard.



To create a workspace filter

4. Checkmark the desired member(s) for which to show data.



Tips:

• The **Exclude Checked** option lets you show data for all members except the selected members.

• You can import a file (see page 38) to quickly select members. Click at the top of the selection window to access this option.

• Power Viewers can optionally click **Save** to create a collection of the checked members so that they can be reused later.

5. Click **Apply**.

Tip:

If the data cube of a widget does not include the key/dimension of the filter, then the filter is not applicable and, therefore, does not affect the widget. For example, if the widget shows weather data that is only associated with a customer key, then a product filter, such as brand, will not affect the widget.

Global filters

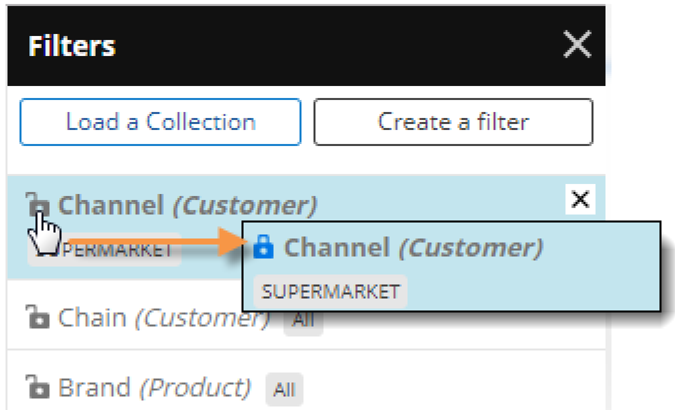
A global filter is a workspace filter that is "locked" so that it stays on when you open other dashboards. You can access these filters using the filter panel just like other workspace filters.

To turn on a global filter

1. Click the button at the top of the dashboard screen to open the filter panel.
2. In the filter list, locate or create the filter you want to turn on globally.
3. Click the lock/unlock button to "lock" the filter. The locked symbol is blue .

When you open another dashboard, it will automatically use global filters. Note that only applicable global filters will be applied (i.e., attribute matches a "Group By" in the dashboard).

Tip: The filter button at the top of the screen shows a contrasting filter symbol if global filters are on: if panel is closed; if panel is open

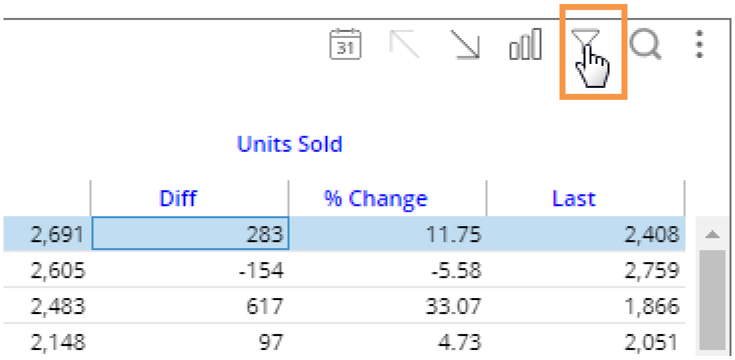


Individual widget filters

Individual widget filters let users filter data in a specific widget. Users simply click the widget's button and then select the data that they want to see.

To create a widget filter

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

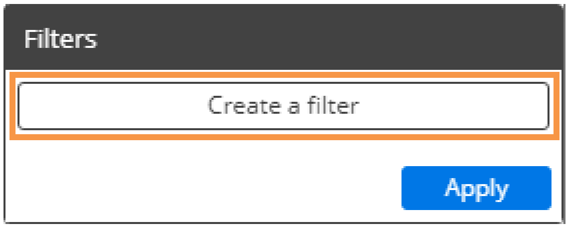


2. In the pop-up dialog, click **Create Filter**.

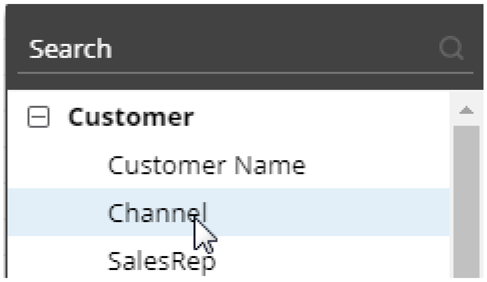
   Other options may be available:

   Checked - If the widget has checked members, you can filter on the checked members.

   Load a Collection - (Power Viewers only) - You can filter on a saved collection of members (see page 36).



3. Select the dimension (i.e., attribute) for which to create a filter. Only dimensions that are built into the widget as "Bys" will be available in view mode.



To create a widget filter

4. Checkmark the desired member(s).

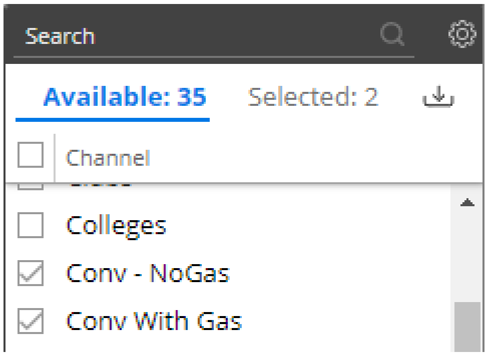
Tips:

• By default, the filter choices only include members with data in the current context. If you wish, you can check **Show All** to list all members.

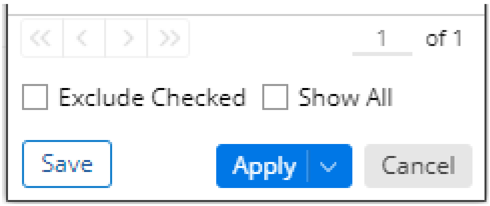
• The **Exclude Checked** option lets you show data for all members <u>except</u> the selected members.

• You can [import a file](#) (see page 38) to quickly select members. Click at the top of the selection window to access this option.

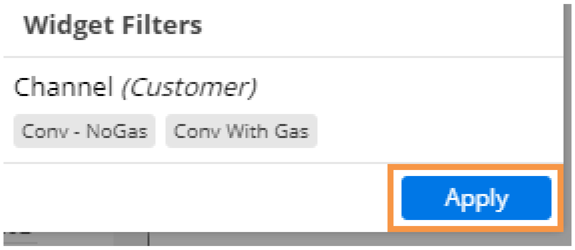
• Power Viewers can optionally click **Save** to create a collection of the checked members so that they can be reused later.



5. Click **Apply** to apply the filter to the selected widget only.



6. Click **Apply** again in the filters area.



Filter data by a collection

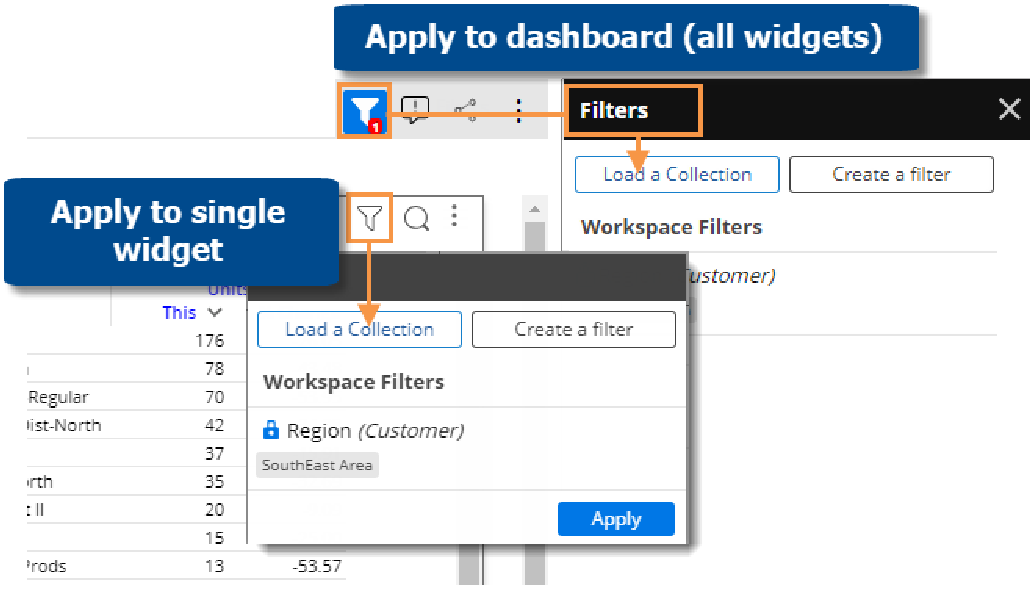
Collections can be applied to a single widget or the workspace (i.e., entire dashboard) to filter the data by a saved set of members. Only Dashboard Designers and Power Viewers can create and apply collections.

To apply a collection as a filter

1. Do one of the following to open the filters area:

- To apply a collection to a single widget, click the filter button at the top of the widget (visible on mouseover).
- To apply a collection to the entire dashboard, click the Filters button to open the Filters panel.

2. Click **Load a Collection**.

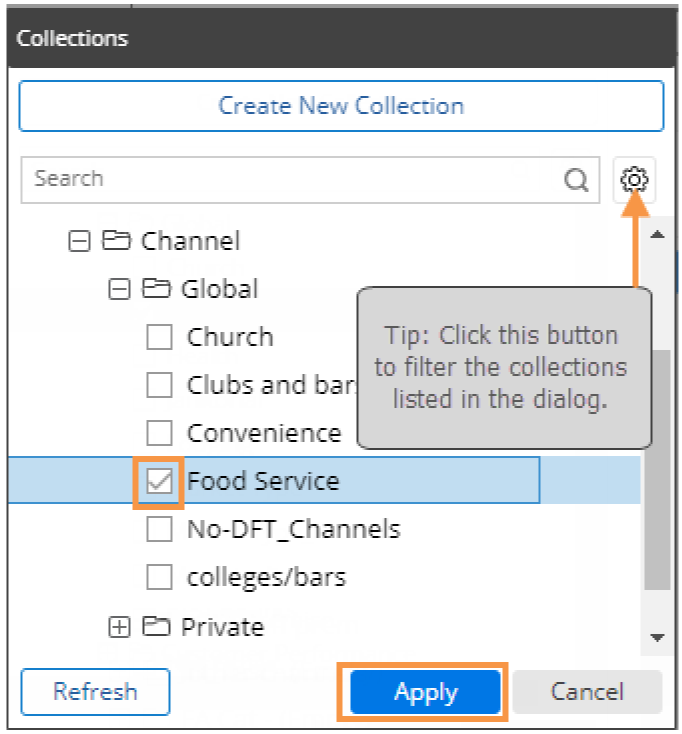


3. In the Collections dialog, locate the collection and place a checkmark beside it. You may need to expand a key, dimension, and category to find the collection. A search option is also available.

   If the collection does not already exist, you can click **Create New Collection** at the top of the window.

Tip: If you select more than one collection within the same key or dimension, results will be limited to members that are common to all selected collections.

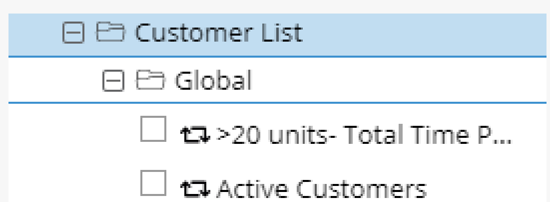
4. Click **Apply**.



Tips:

The breadcrumb path does not show when collection-based filters are on, but the widget tooltip (shown when placing the cursor over the title bar) shows collection filters.

In the Collections dialog, dynamic collections have a symbol. These are created in SIM and dynamically update based on test criteria.



Import filters

Users can import a text file (i.e., local collection) to quickly select members for several types of filters, including workspace filters, individual widget filters, and filter widgets. In addition, text files can be used when creating filter buttons and collections. Any user can access this capability, unlike collections which are limited to Power Viewers and Dashboard Designers; however, this feature may be turned off globally by your administrator.

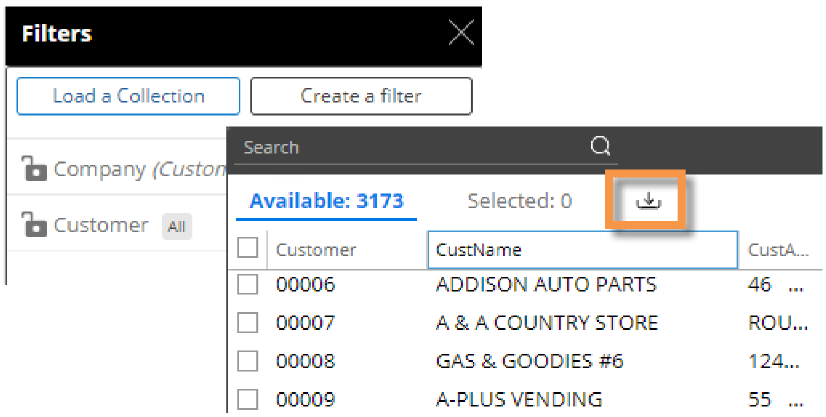
To import a text file for a filter

1. If you haven't already, create a text file that lists the members. It should have the CSV extension. Each line should list the host code of a single member.

Example CSV file

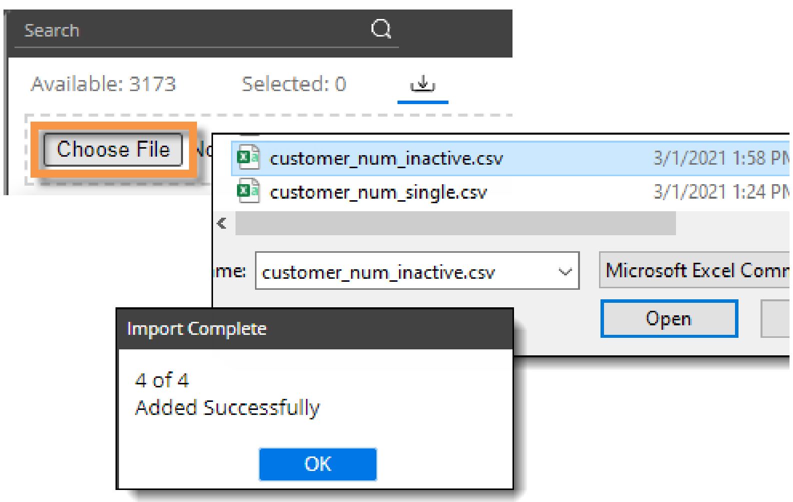
```
91857
11904
11880
00000
```

2. Go to the selection window for the filter. For example, to import a text file for a workspace filter, click on the workspace filter in the filters panel.
3. Click the button at the top of the window.



4. Choose the file and click Open.

   Salient Dashboards will show a summary of the members imported.



5. Click **Apply**.

Drill down (i.e., downlevel filters)

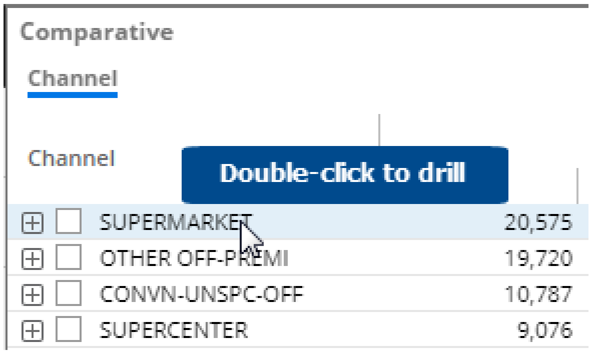
You can drill down on one or more members to filter the data in a widget. When you drill, Salient Dashboards adds a downlevel filter to remove data for all other members.

Drilling is only available in data widgets that have multiple Group By dimensions.

To drill down on a single member

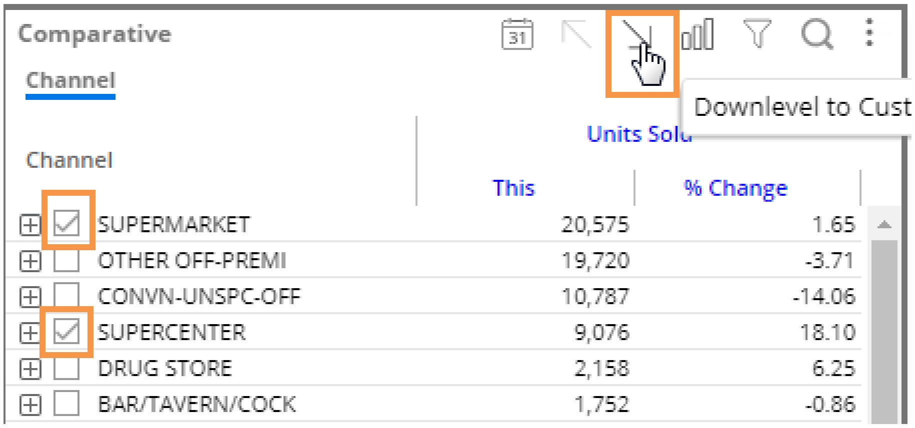
Double-click on the row, bar, pie slice, etc., representing that member.

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



To drill down on multiple members

1. Check the desired members (see page 27) in a grid.
2. Click ↘ on the title bar at the top of the widget.
3. If a drop-down appears, select **Drill into Checked Rows**.

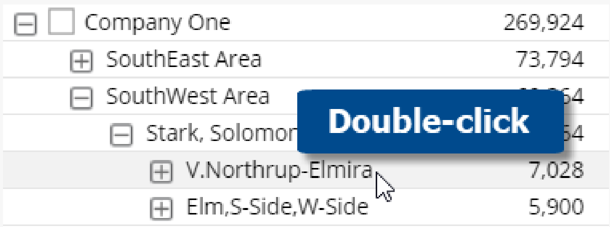


Tips:

When you drill, the By becomes what was previously the 2nd By. You may be able to change the By and/or downlevel order (see page 24) as you drill to follow a flexible drill path. Only Power Viewers and Dashboard Designers have this capability.

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

You can drill down on expanded grid rows to filter on multiple levels at once. In this case, drilling back up will remove all the drill levels simultaneously.



Tips:

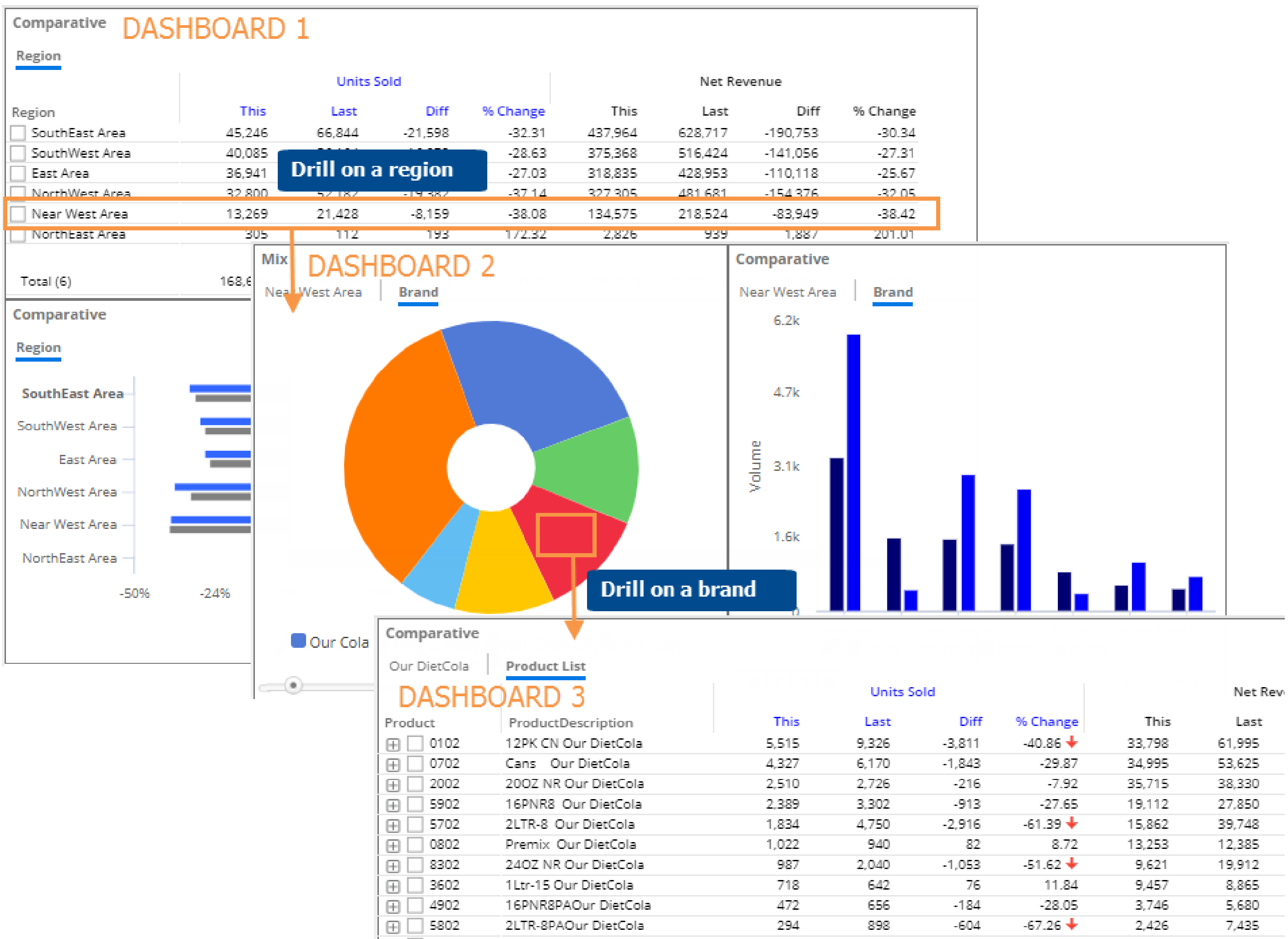
If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

Drilling affects other widgets in the dashboard if the dashboard has a corresponding workspace filter.

Custom drill-downs

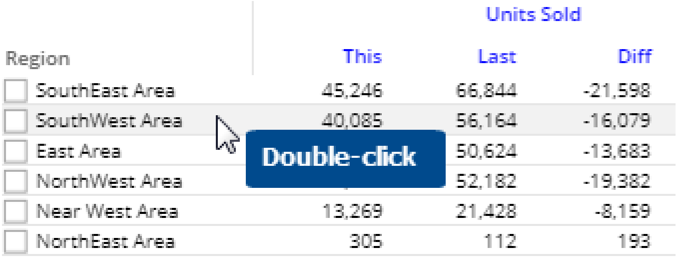
A custom drill-down is a set of preconfigured dashboards through which the user can drill (see page 41). The custom drill path can include a variety of widget types and display settings to optimize the investigative process while allowing the user to select the item(s) on which to drill.

Custom drill-downs must be created in edit mode by a Dashboard Designer. All dashboards in a custom drill-down must be published.



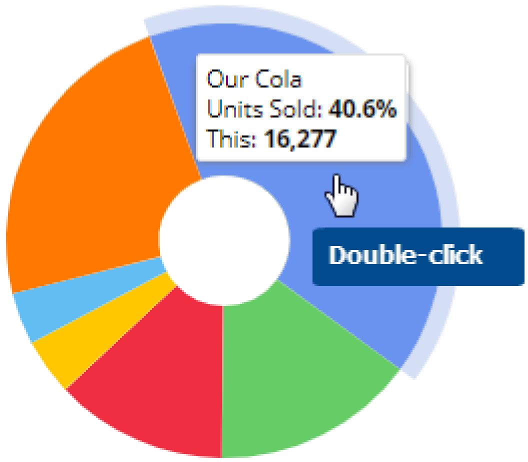
To use a custom drill-down

1. [Open the first dashboard](#) (see page 9) in the custom drill-down.
2. Select the item(s) and drill by [double-clicking or using other drill methods](#) (see page 39).



Region	Units Sold This	Units Sold Last	Units Sold Diff
SouthEast Area	45,246	66,844	-21,598
SouthWest Area	40,085	56,164	-16,079
East Area		50,624	-13,683
NorthWest Area		52,182	-19,382
Near West Area	13,269	21,428	-8,159
NorthEast Area	305	112	193

3. You can continue to drill down until you reach the last dashboard in the custom drill-down.



Tips:

Depending on the widget's configuration, you may need to drill through additional levels of Bys before the next dashboard will open.

You can drill on multiple member(s) by checking them and then clicking ↘ on the title bar at the top of the widget.

Explore (Power Viewers only)

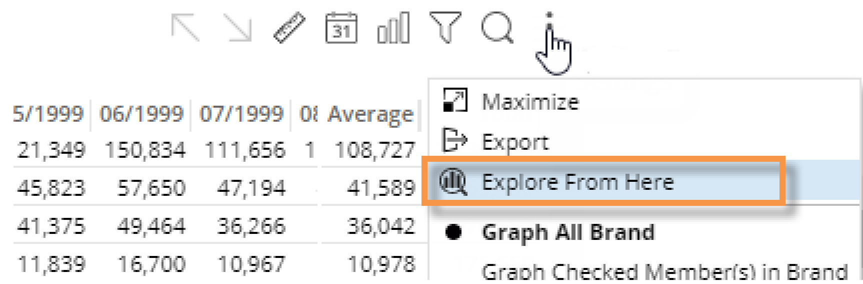
Explore mode provides additional capabilities for data investigation beyond those available in view mode. Users can change the analysis type, group the data by another attribute (any available in the dataset), add measures besides those that were built into the dashboard, and more. Explore mode does not allow users to build and format complex dashboards. Administrators can turn off this capability.

To start exploring from a widget

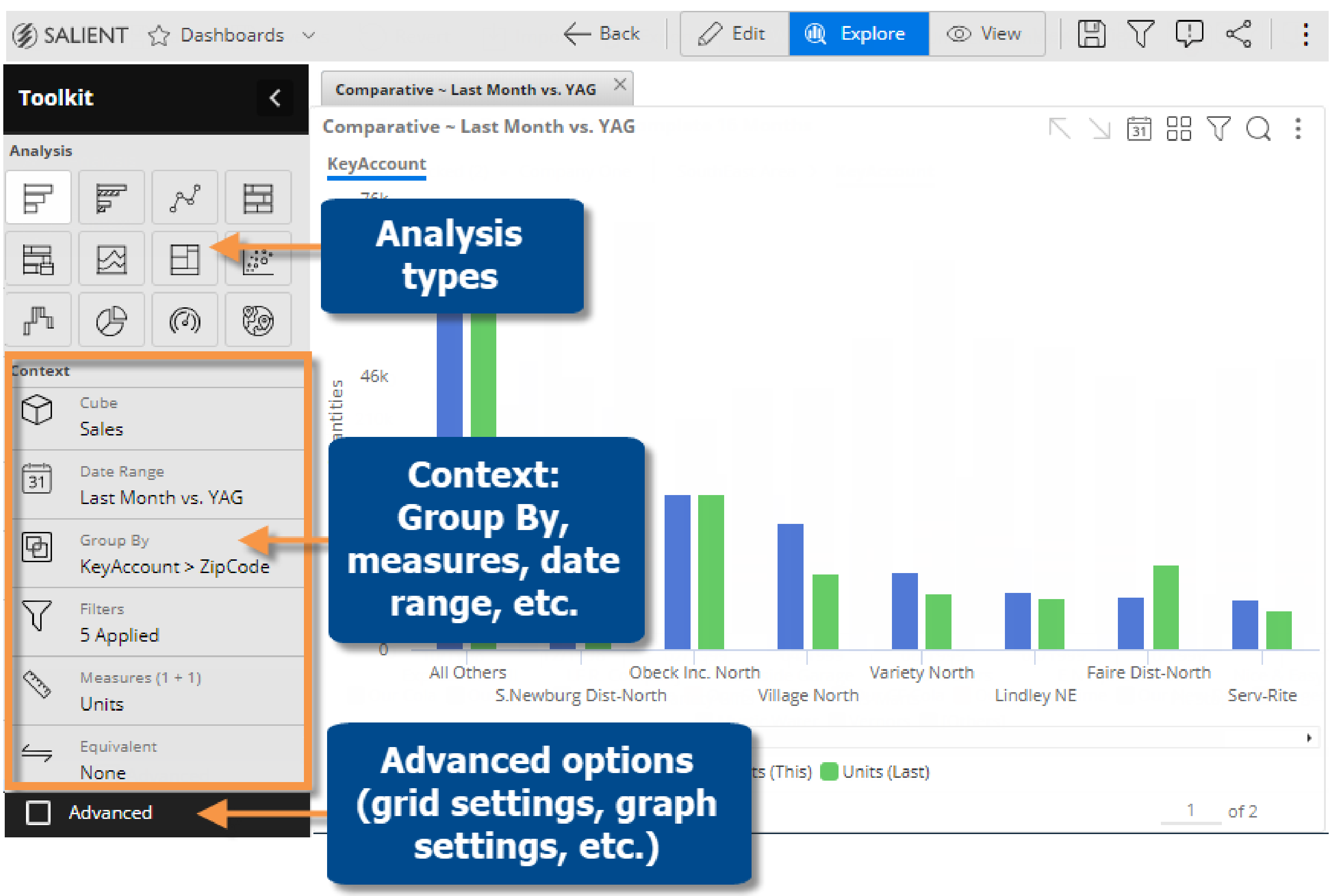
When viewing a dashboard, you can expand any of its widgets in explore mode to dig deeper into the data.

Click ⋮ in the upper-right corner of a widget (visible on mouseover) to open the menu.

Select **Explore From Here**.

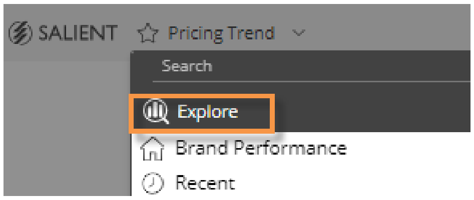


The widget is maximized within its own tab in explore mode. Additional options to investigate the data (see below) are available in the toolkit on the left side of the screen.



Go straight to explore mode

If you prefer, you can start exploring from a default view rather than picking a widget



In the dashboards screen, open the dashboards menu and select **Explore**.

The default starting point is a simple comparative, unless your organization has customized its own starting point.

What you can do in explore mode

Explore mode offers the same options for interacting with the data that are available in view mode plus the following:

- Change the analysis type (see page 43).
- Add any measures (see page 44). In key lists, you may also add descriptions and dimensions.
- Select any dimension as the Group By or Filter By (see page 46).
- Highlight data (see page 48).
- Duplicate a widget (see page 51).
- Access advanced options (see page 52) (general settings, grid settings, graph settings, and navigation links).

When you are finished exploring

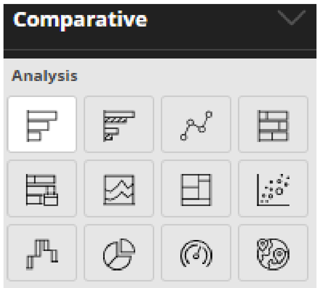
When you are done exploring, you can:

- Use the browser's back button to go back to your previous dashboard/mode.
- Save (see page 57) your changes in a new dashboard. The resulting dashboard will use the same formatting as explore mode (i.e., maximized widgets in a tabs).

Change the analysis type in explore mode

To change the analysis type

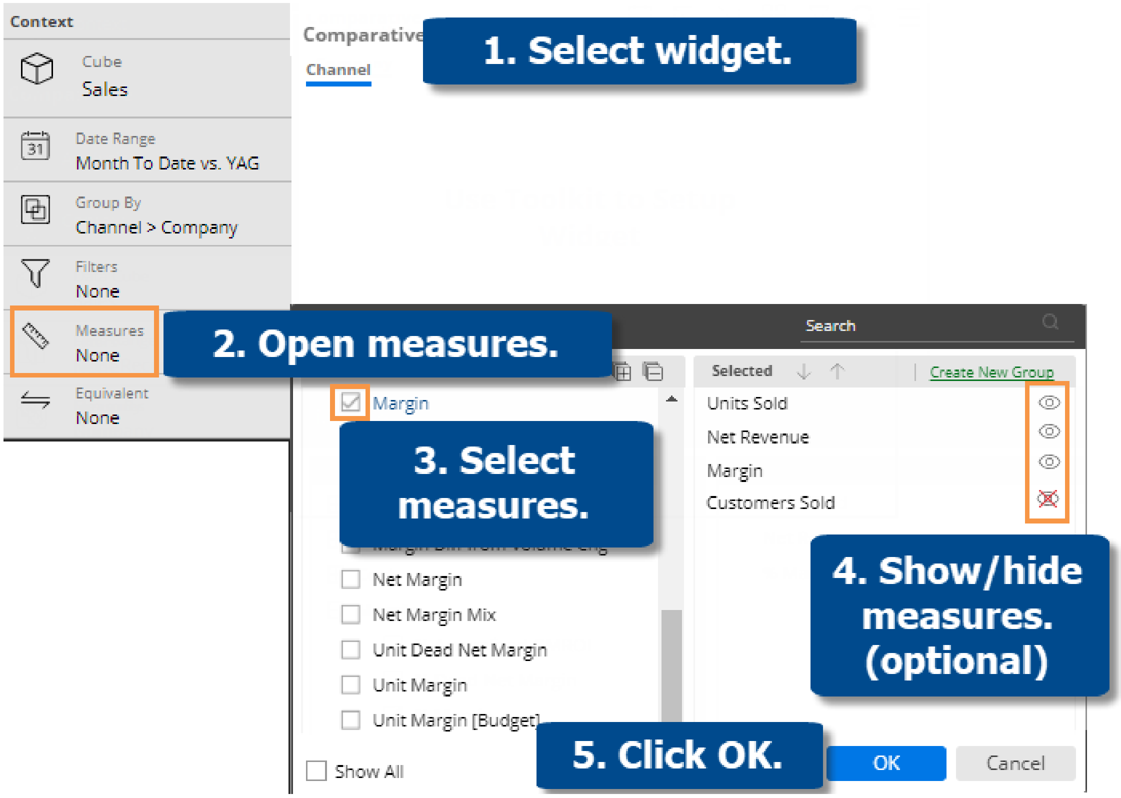
1. Select the widget.
2. At the top of the toolkit, click the button of the desired analysis type (see page 63).



Add measures in explore mode

You can add measures or "data fields" to data widgets using the measures area of the toolkit (located under Context).

To add measures



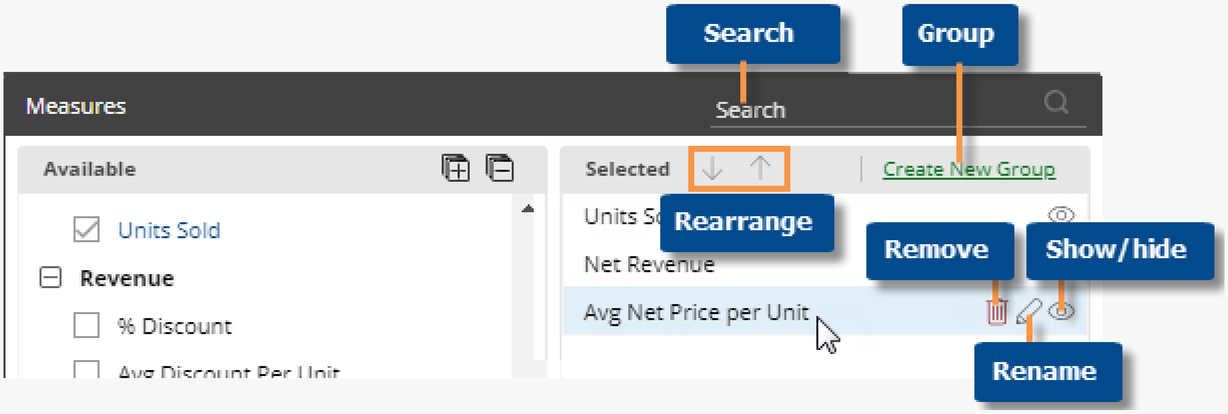
1. **Select widget** - Click on the widget if it's not already selected.
2. **Open measures** - In the Toolkit panel, expand the **Context** area and click on **Measures**.
3. **Select measures** - Under **Available**, click the row(s) or box(es) of the measure(s) to show. The selected measures appear in the right pane. The number of allowed measures depends on the widget type.
4. Optionally, hide all measures except those that you want to show.
5. Click **OK**.

Tips:

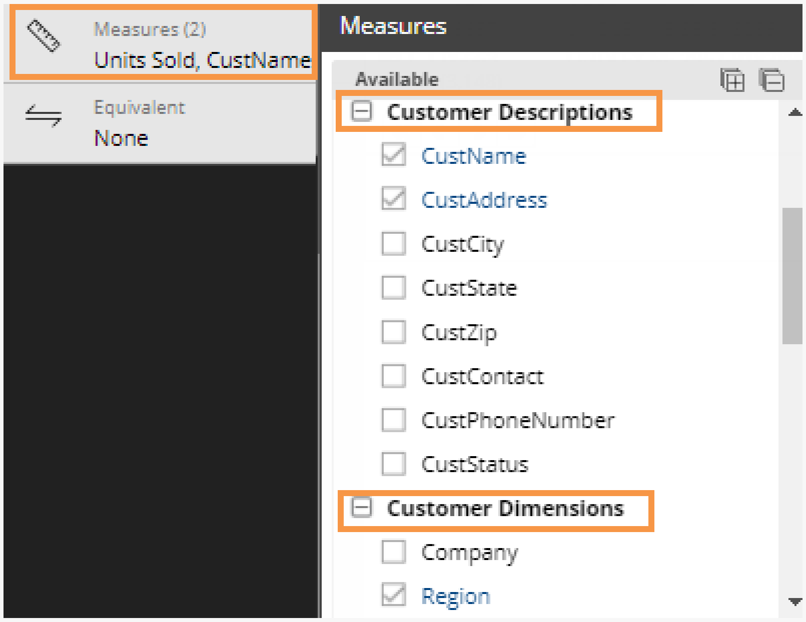
By default, the available measures depend on the context (data cube, By, etc.). You can check the **Show All** link at the bottom of the dialog to see all measures regardless of the context. Measures may also be limited by the analysis type.

Tips:

The tools in the right pane of the dialog allow you to search for a measure, remove a measure, rearrange measures, rename a measure (display name only), and show/hide measures. In addition, you can create measure groups to help organize measures if you wish.



In a key list (e.g., customer list), you can add descriptions (e.g.,name, address, channel, etc.) and dimensions (e.g., region, sales rep, etc.) in addition to measures.



Group or filter by any attribute in explore mode

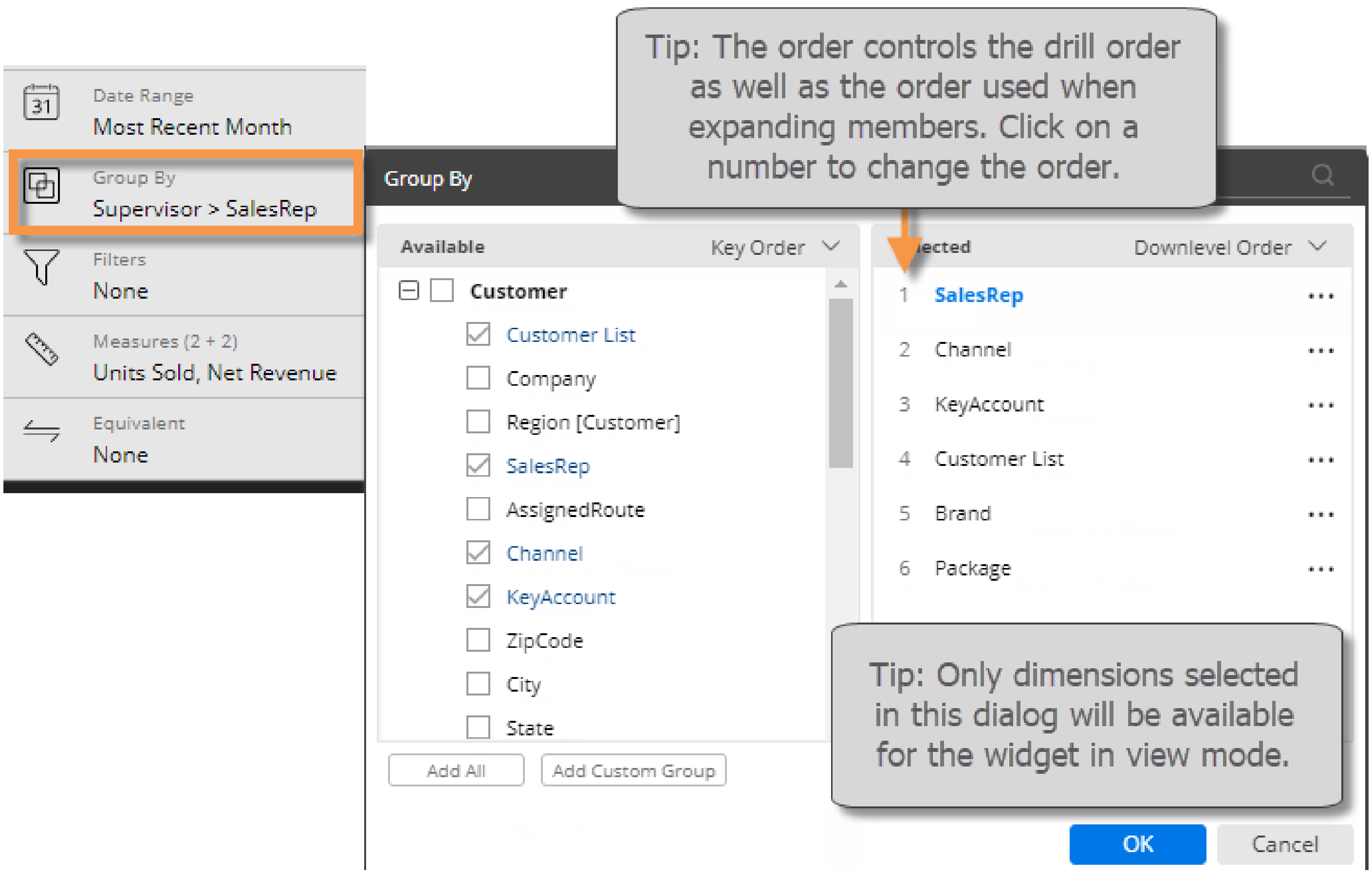
In explore mode (see page 42), you can select any attributes in the dataset; you are not limited to those built into the dashboard. In comparative widgets, these attributes control how the data can be grouped (i.e., Group By), drilled on, and filtered. In non-comparative widgets (Trend, Gauge, Waterfall, etc.), these attributes control what filters can be applied (i.e., Filter By).

Group By (in comparative widgets)

1. Click on the widget and then click on **Group By** in the toolkit.
2. In the dialog, select the desired Group By attribute(s):

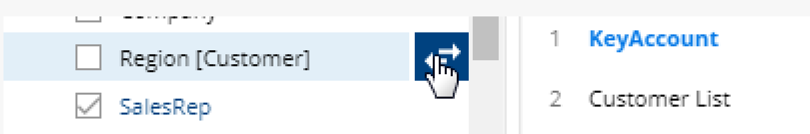
   • To add a Group By attribute, checkmark it on the left pane of the dialog.

   • To change the order of the selected Group By attributes (i.e. drill order), drag and drop in the right pane or select from the number drop-down menus.
3. Click OK.



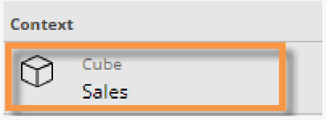
Tips:

You can swap a By in the Group By dialog by clicking the original dimension in the right pane, placing your cursor over a different dimension in the left pane, and clicking the arrow button.

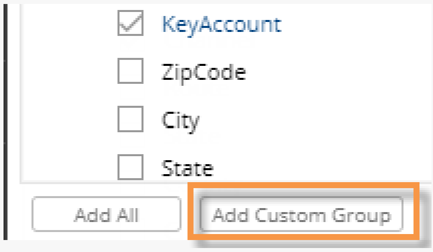


Tips:

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



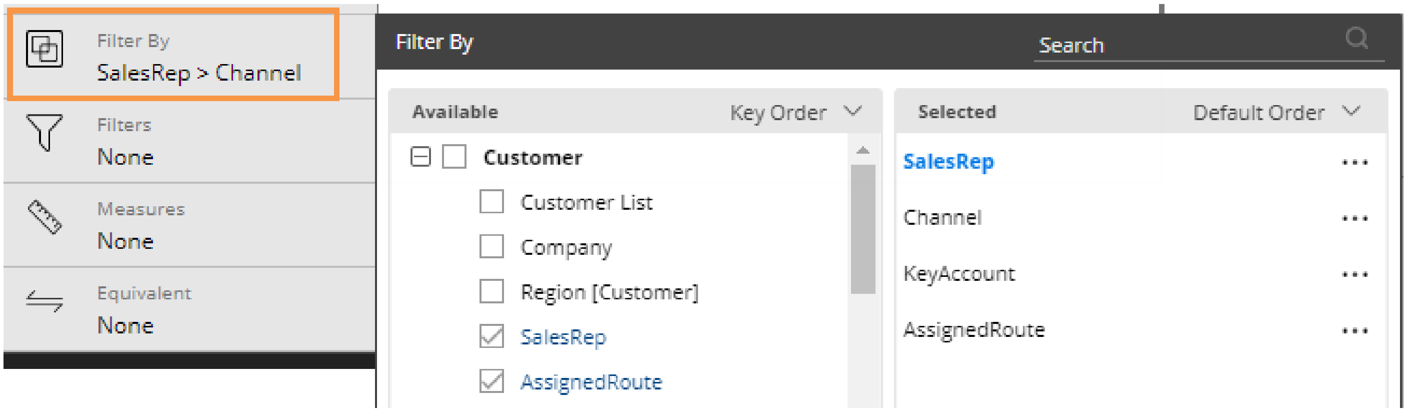
You can add a custom group to create your own method for grouping and comparing data.



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

Filter By (in non-comparative widgets)

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



Highlight data

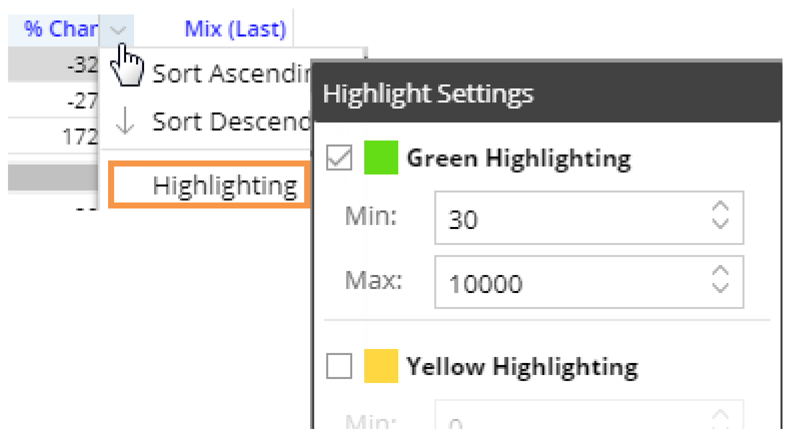
You can highlight data based on custom criteria or percent of the total (i.e., heatmap) to spot areas of concern or importance. The availability of highlighting depends on the widget type.

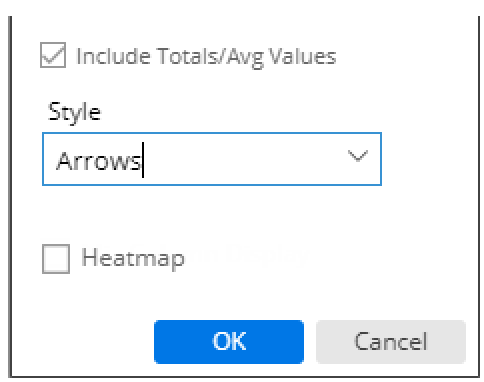
Grid highlighting based on custom criteria

SouthEast Area	69,324	4,605	7.12
SouthWest Area	65,067	4,181	6.87
East Area	58,896	3,845	6.98
NorthWest Area	56,410	5,662	11.16
Near West Area	20,919	-229	-1.08
NorthEast Area	289	-6	-2.03

To highlight data based on custom criteria in a grid (in explore mode)

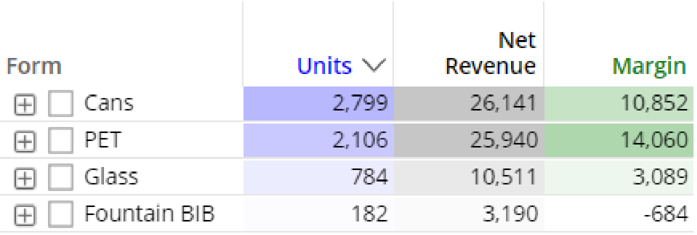
1. Place your cursor on the heading of the column to highlight. You can highlight actual values (This or Last), percent change, difference, etc., for any measure.
2. Click the drop-down arrow that appears.
3. Select **Highlighting**.
4. In Highlight Settings, check **Green highlighting**, **Yellow highlighting**, and/or **Red highlighting**, depending on the highlighting color(s) you want to use.
5. For each color range, type a minimum value and maximum value. If you use multiple ranges, they cannot overlap.
6. Optionally, check **Include Totals/Avg Values** to apply the highlight settings to applicable totals, averages, and subtotals (i.e., checked/unchecked) in the grid.
7. From the **Style** drop-down, select a highlighting style. The style controls the symbol used in grids.
8. Click **OK**.





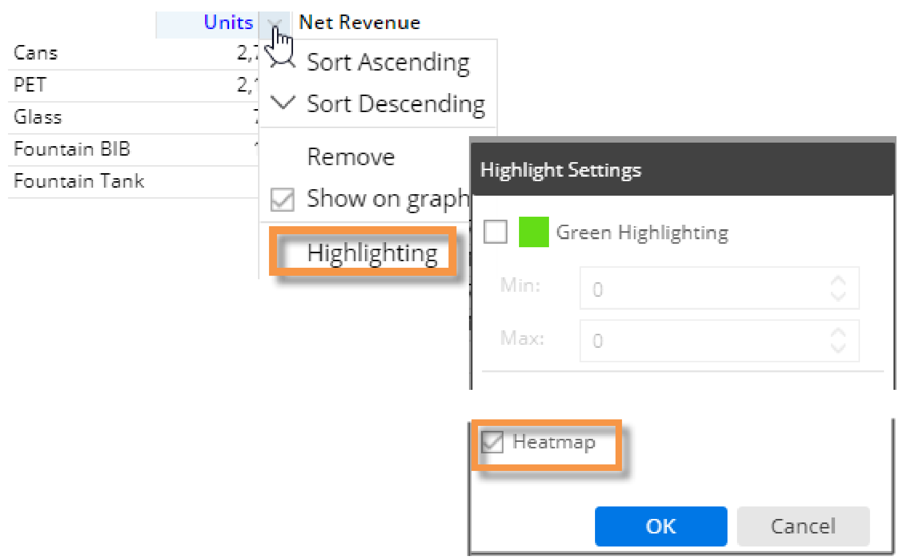
Heatmap highlighting in grids

You can highlight grid cells based on the percent of the total for a given column to create a "heatmap"; the darkest shades represent the largest values. This method does not require you to enter criteria because the shades are calculated automatically.



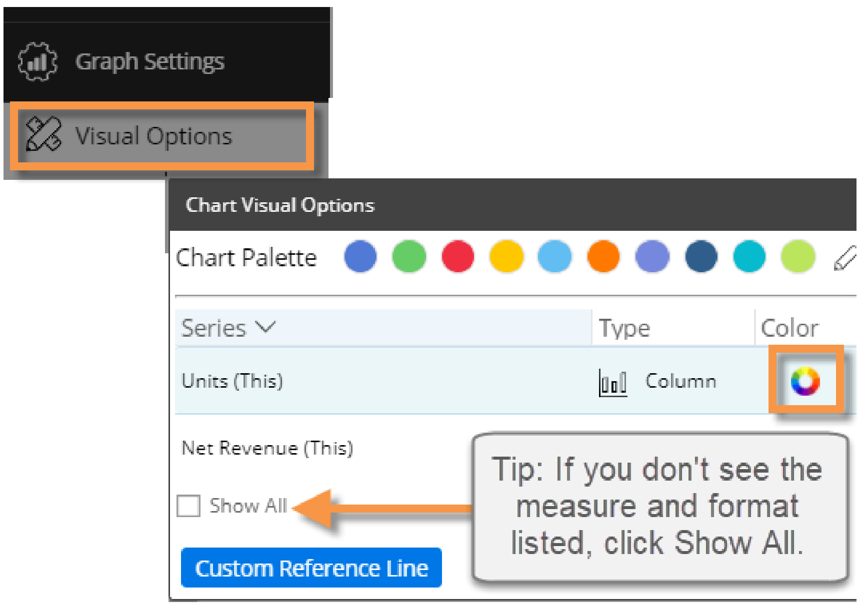
To turn on heatmap highlighting (in explore mode)

1. Place your cursor on the heading of the column to highlight.
2. Click the drop-down arrow that appears.
3. Select **Highlighting**.
4. In **Highlight Settings**, check the **Heatmap** box.
5. Click **OK**.

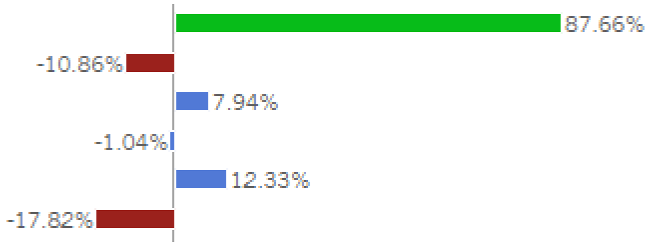


6. Optionally, choose a custom color in Graph Settings, Visual Options. Locate the specific measure and format (e.g., Units for This date range) and then click in the Color column. This color will serve as the darkest shade possible, with other shades calculated accordingly.

   If you skip this step, then the grid will use the color of the data type (i.e., blue for volume, black for revenue, etc.)

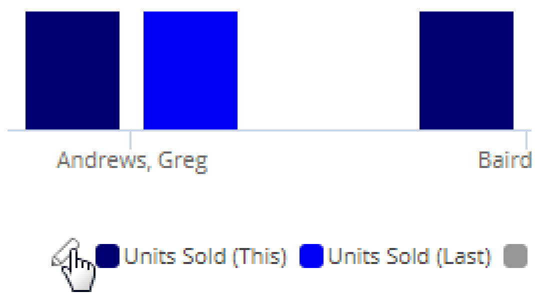


Graph highlighting



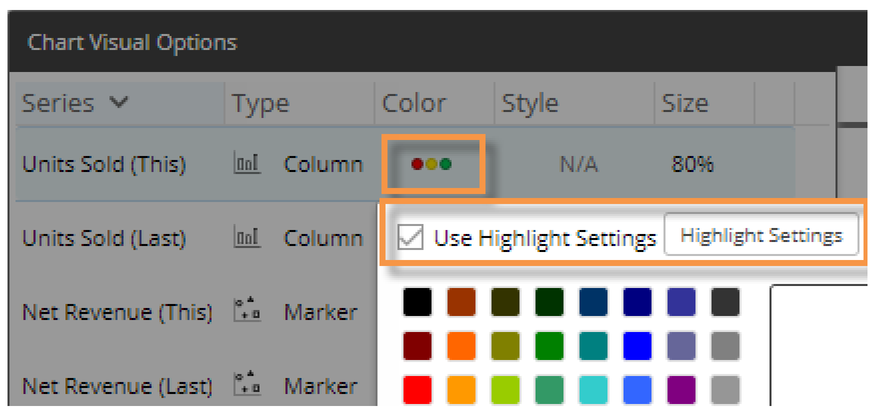
To highlight data in graphs

1. Access visual options by clicking in the graph legend (available on mouseover if the legend is enabled).



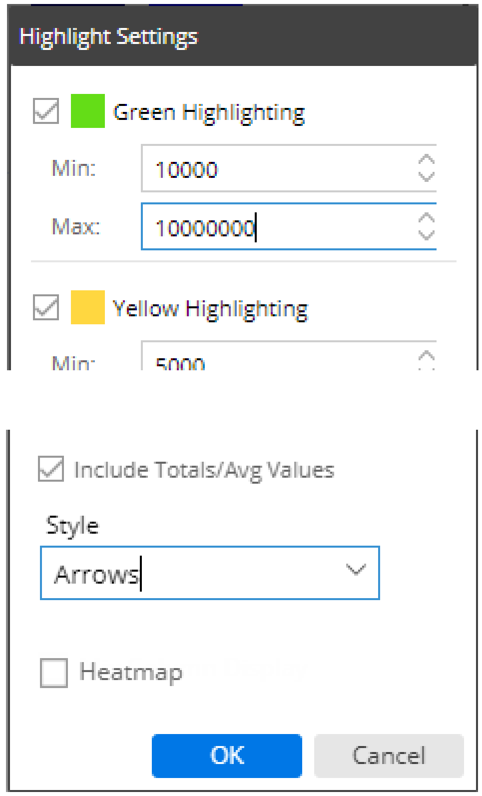
> **Tip:** You can also access visual options under Graph Settings in the toolkit (in explore mode).

2. For the measure/format to highlight, click in the Color column.
3. Check the **Use Highlight Settings** box.
4. If highlight settings are not already configured, click the **Highlight Settings** button and set highlighting ranges as explained below.



To highlight data in graphs

- For each color you wish to use, check the box and type a minimum value and maximum value. Ranges cannot overlap.
- Optionally, check **Include Totals/Avg Values** to apply the highlight settings to applicable totals in the graph. This setting only affects graphs that compare members and include the graph total, which can be turned on in graph settings.
- Select a style. In graphs, the style controls custom highlighting colors if they are configured.
- When you are finished, click OK.



Duplicate a widget in explore mode

When you duplicate a widget in explore mode (see page 42), the new widget will be maximized in its own tab, allowing you to follow another path of investigation within the dashboard.

To duplicate a widget

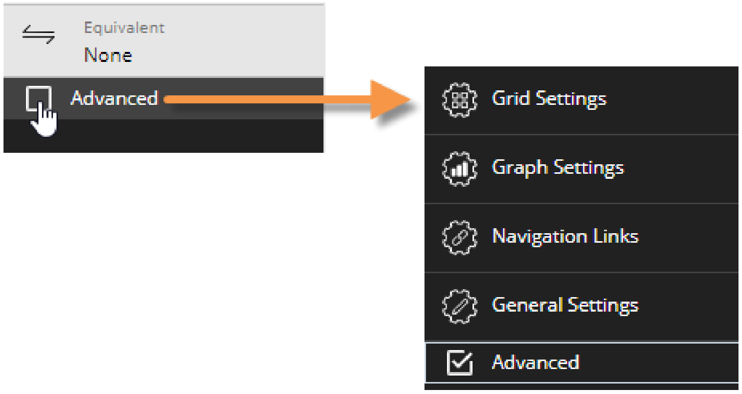
1. Select the widget/tab you want to duplicate.
2. On the widget title bar, click the ⋮ menu button and then select Duplicate Widget.
3. Make changes to the new widget as desired.

Advanced options

In explore mode, advanced options are hidden by default to simplify the screen.

To turn on advanced options for exploring

At the bottom of the toolkit, check the Advanced box.

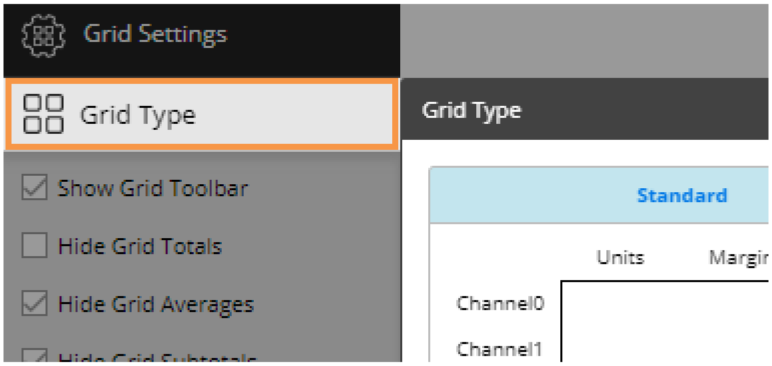


The following settings become available.

Area	Settings
Grid Settings	Grid page size, show/hide totals, grid types (see page 53), etc.
Graph Settings	Graph page size; orientation; show/hide legend, axis, labels; visual options (see page 54), etc.
Navigation Links	Embedded links to other dashboards
General Settings	Widget title, style, size, position, transparency, enable/disable options for view mode, etc.

Grid types

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



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

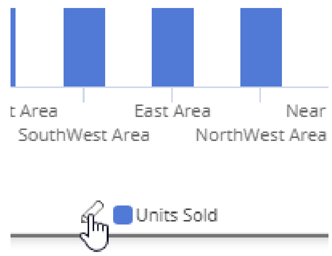
Visual options

Using visual options, you can customize the colors and styles used in most graphs.

To access visual options

In view mode:

Click 🖉 in the graph legend (visible on mouseover if the legend is enabled).

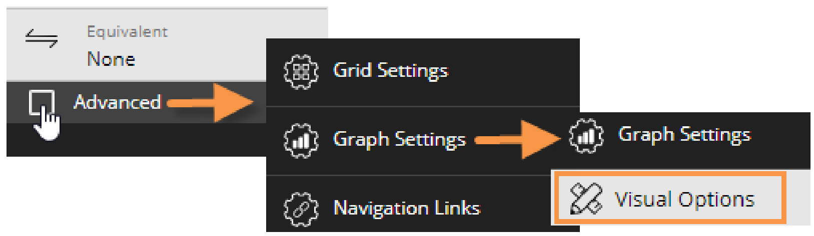


In explore mode:

Checkmark Advanced at the bottom of the toolkit.

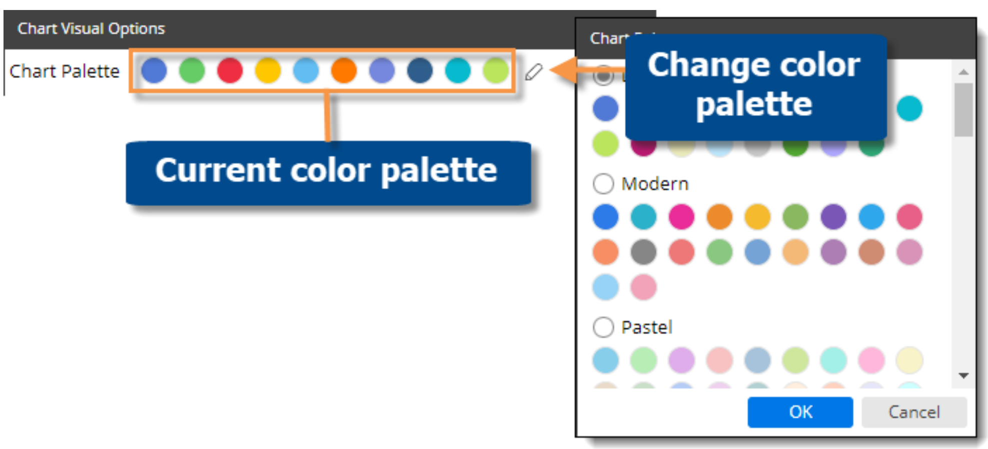
Expand Graph Settings.

Click on Visual Options.



Choose a color palette

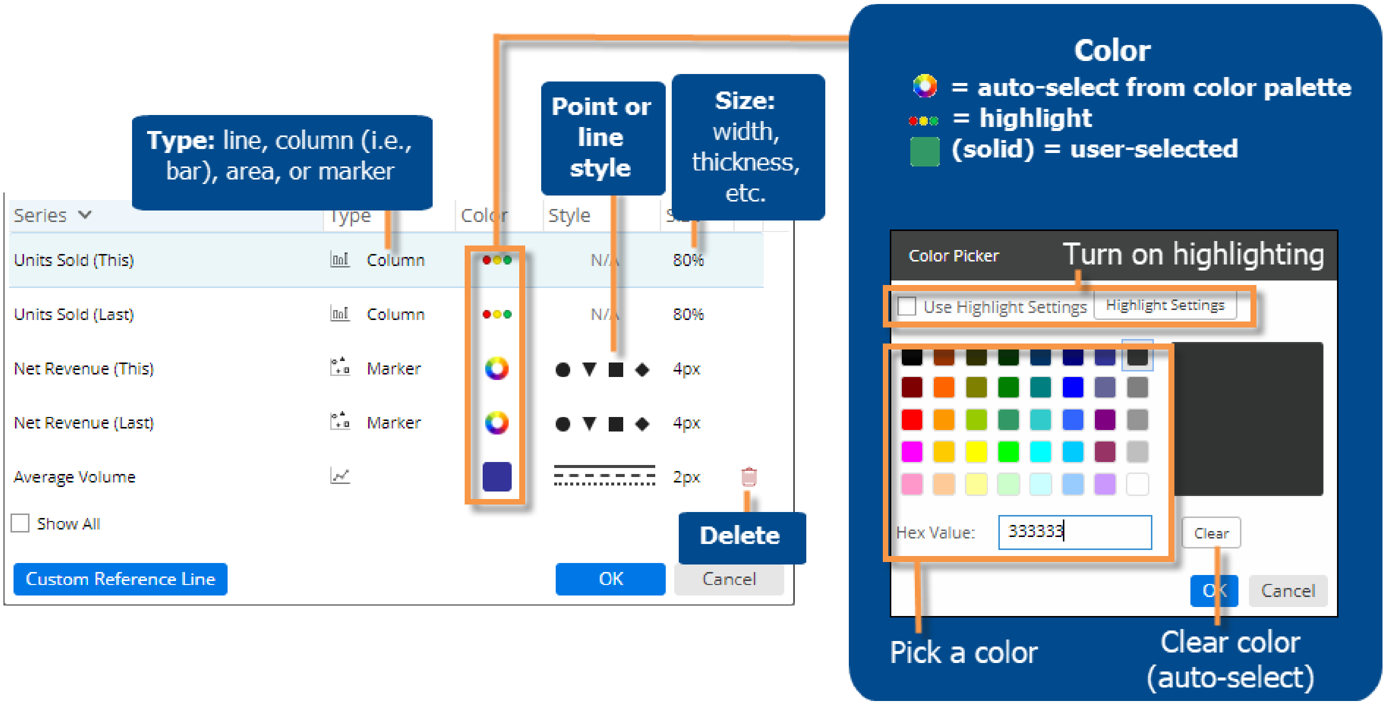
At the top of visual options, click 🖉 to change the color palette, which controls the default colors of the graph components. Salient Dashboards will apply the selected palette's colors in the order they are shown (e.g., blue to first component, green to second component, etc.). The available palettes depend on the dataset configuration.



Tip: You can override the selected palette by choosing a color for an individual graph component as explained below.

Customize graph components

Depending on the graph type, you can customize individual graph components (e.g., bars, lines, points, etc.). In visual options, click in the row of the component to make the following changes:



Tip: If you don't see the measure/format, checkmark the **Show All** box.

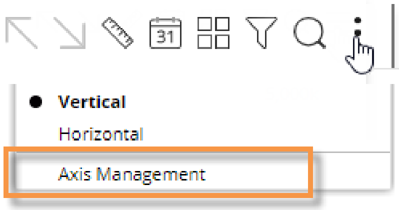
Axis management

You can customize the axes of several graph types, including Trend, Comparative, and Multi Comparative.

To customize axes

Before proceeding, add the desired measures (see page 44).

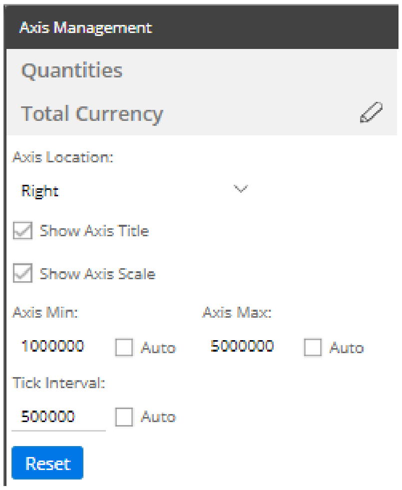
1. Click ⋮ in the upper-right corner of the widget, and select Axis Management.



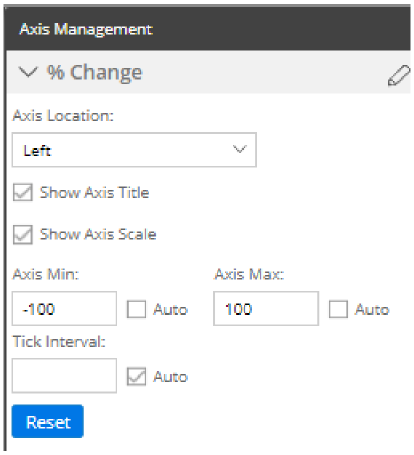
2. For an actual value graph, choose the axis to customize (e.g., Quantities, Total Currency, etc.). Depending on the selected measures, the graph may include multiple axes, each of which represents a measure or data family.

   For a percent change graph, all % change data will be plotted along a single axis so this step is not necessary.
3. To change the axis title, click 🖉 (requires Power Viewer licensing or higher).
4. Choose the axis location.
5. Show or hide the axis title.
6. Show or hide the axis scale.
7. Choose scale settings, including the minimum, maximum, and tick interval. These may be automatic or custom values.
8. Click Save when you are finished.

Actual value axis settings:



Percent change axis settings:



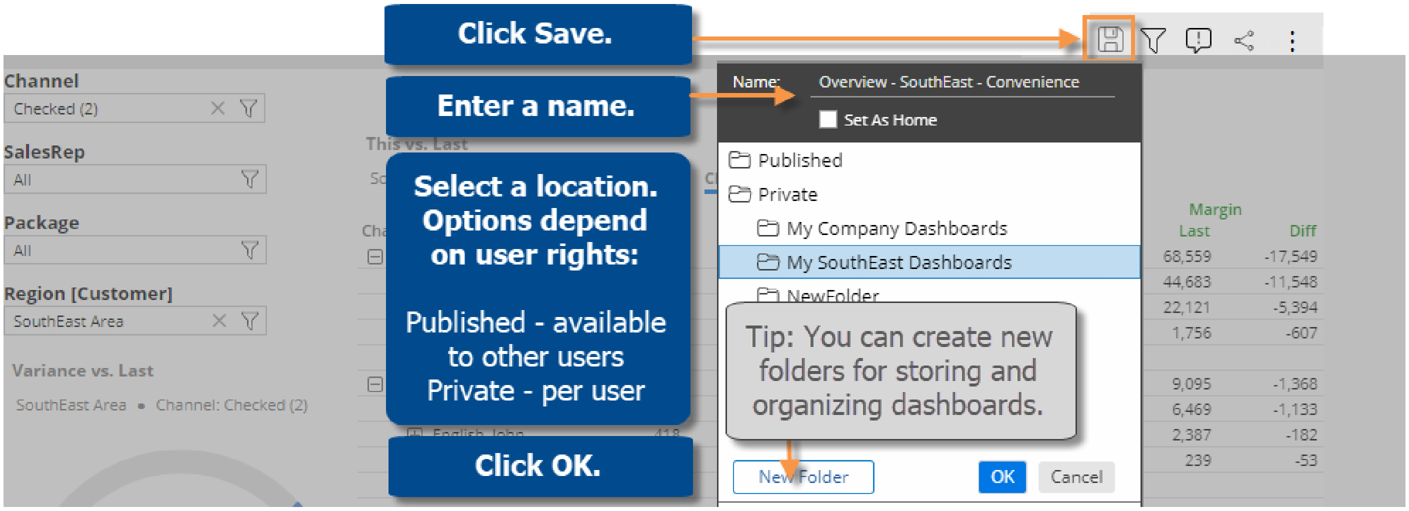
Save and share

Save a dashboard (Power Viewers only)

After you have made changes to a dashboard, you may want to save it so that you can return to it in the future with your desired settings already applied and/or share it with others (additional rights may be required).

To save a dashboard

1. Open the original dashboard and make the desired changes. For example, you might apply a filter or change the date.
2. Click **Save** at the top of the screen.
3. Type a dashboard name. This might be the same as the original dashboard or you might modify the name.
4. Select a location. The available locations depend on your user rights: private dashboards are only available to you; published dashboards are available to other users.
5. Click **OK**.



Tips:

The saved dashboard is a copy of the original dashboard unless you overwrite it using the same location and name; therefore, if the original dashboard changes, the copy will not be updated.

If you only have access to the private folder and you want to share a dashboard with other users, you may want to use the Share URL feature (see page 58).

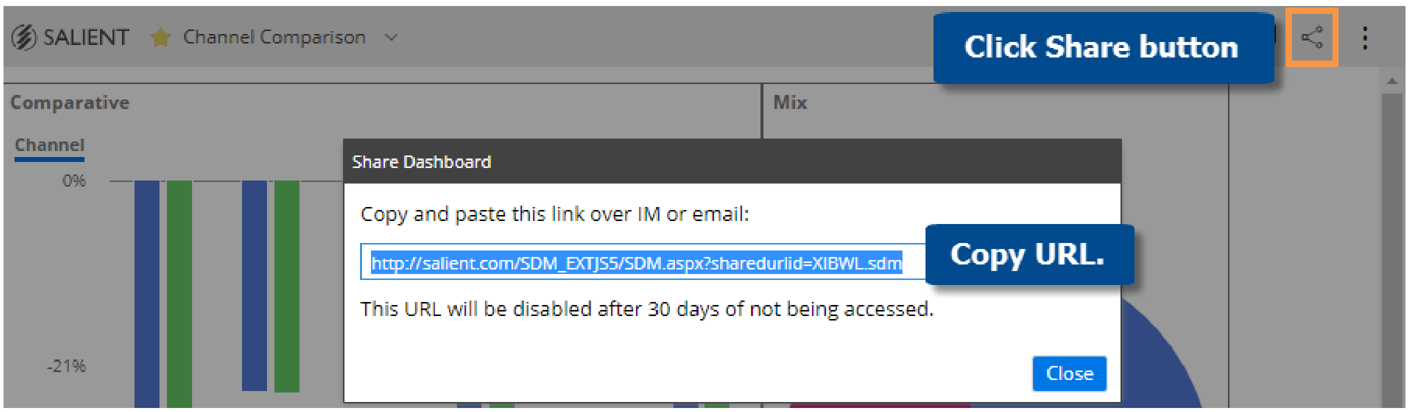
Share a dashboard

Sharing a dashboard creates a temporary dashboard URL, which you can access in future sessions and/or share with other users. A shared URL retains any changes that you made, such as filters, date range selections, etc., and is therefore, a useful method for returning to a dashboard with your preferred settings already applied.

The URL is valid for a number of days (set by your administrator) after the last time it is accessed; therefore, if users continue to access the URL, it will remain available.

To share a dashboard

1. Open the dashboard and make the desired changes. For example, you might filter or change the date.
2. Click  in the upper-right corner of the screen.
3. In the **Share Dashboard** window, copy the URL using the browser controls (for example, right-click and select Copy in most desktop browsers).
4. Share or save this URL for use by other users or in future sessions.



Export data from a widget

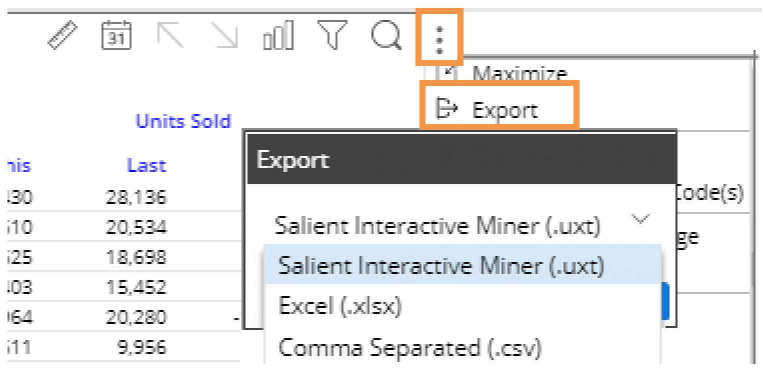
You can export the data from a widget to one of the following file types, depending on dashboard and widget settings. This option is available in a grid or graph; however, only the data (i.e. not the graph) will be included in Excel and comma-separated value files.

- UXT file (.uxt), which can be opened in SIM. Because SIM and dashboards have functionality differences, the view will be approximately the same between the two applications, but may have minor differences.
- Excel (.xlsx)
- Comma-separated value (.csv)

Alternatively, you can create a pdf file (see page 60).

To export data from a widget

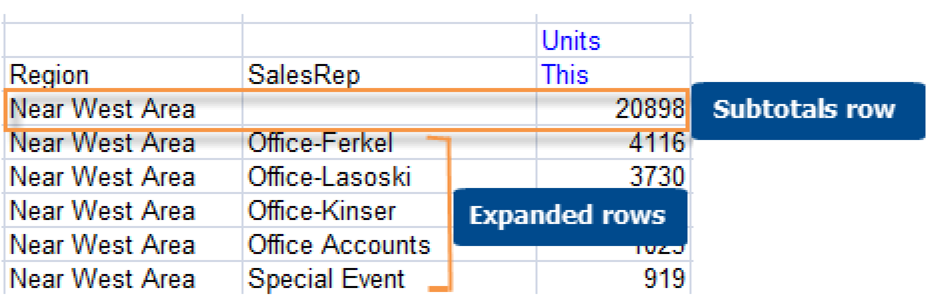
1. Customize the widget to use the desired date range, dimension, drill-path, etc.
2. On the title bar of the widget, click ⋮ and then select Export.
3. If prompted, in the **Export** dialog, select the file type to which you want to export. The file type may be pre-configured.



4. If you are exporting to Excel or a comma-separated file, you may also have the following options:

   What to Export (only in widgets with multiple pages or checked rows): Choose to export rows in the current page of data, all rows in all pages, or only the checked rows (if rows are checked).

   Export 2nd By Option (only if multiple Group Bys are configured): Choose whether to export rows for the 2nd By underneath members of the 1st By. If you choose to export 2nd By (i.e., expanded) rows, an additional option (**Include First By Subtotals**) allows you to include or omit a row to show the subtotal value for each member of the 1st By. Be aware that with this option checked, the data includes duplicates and a simple totaling of a column may yield incorrect results. For example:



   Include Host Code Columns: Check this option to include a column(s) for the host codes of the members.

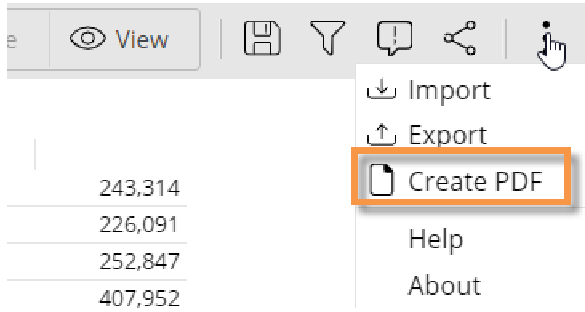
   File Name: Specify the file name to use.

5. Click **OK**.

Create a PDF

You can create a portable document format (.pdf) file that shows the contents of a dashboard.

To create a PDF



1. Open the dashboard.
2. Click in the upper-right corner of the screen.
3. Click **Create PDF** in the menu.
4. In the dialog, enter a file name or leave as is to use the default file name.
5. Choose from the following options:

Fit Dashboard to Single Page - This option fits the entire dashboard on one page. (The page may be a non-standard size.) If this option is cleared, the PDF file may include multiple pages.

Include Header on Each Page - This option includes headers with the dashboard name, date, and time as well as footers that show the dashboard a URL links. You can optionally add your own custom footer above the URL.

Export Individual Tabs as Separate Pages (only for dashboards that include tab group widgets) - This option shows the contents of all tabs on separate pages. If this option is cleared, the PDF file will show whatever tab is currently selected and omit the other tabs. When the option is on, you can clear the boxes of any tabs to selectively include or exclude specific tabs.

6. Click **Create**.

Salient Dashboards will temporarily open a new browser tab while it creates and downloads the PDF. This process will take longer the first time you use this feature.

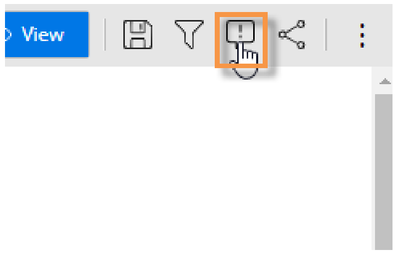
Knowledge Manager

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

To show the Knowledge Manager panel

Click the Knowledge Manager button at the top of the screen to open the panel.

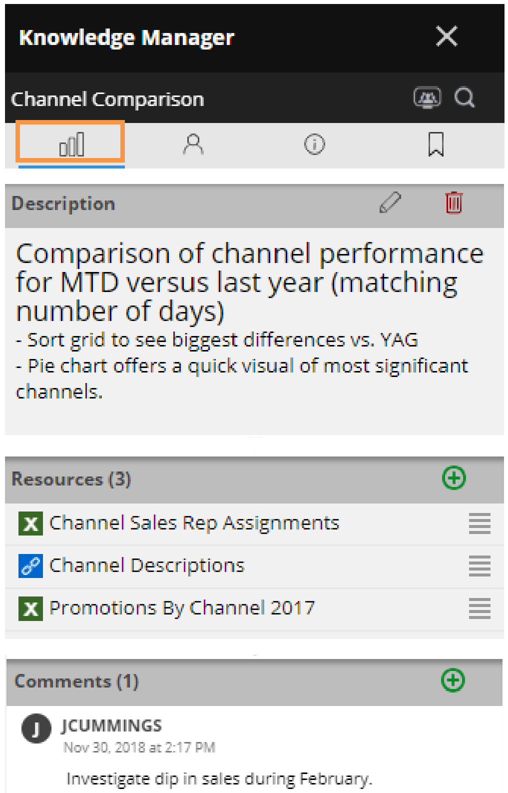
Knowledge Manager includes the following tab.



Dashboard Info

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

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



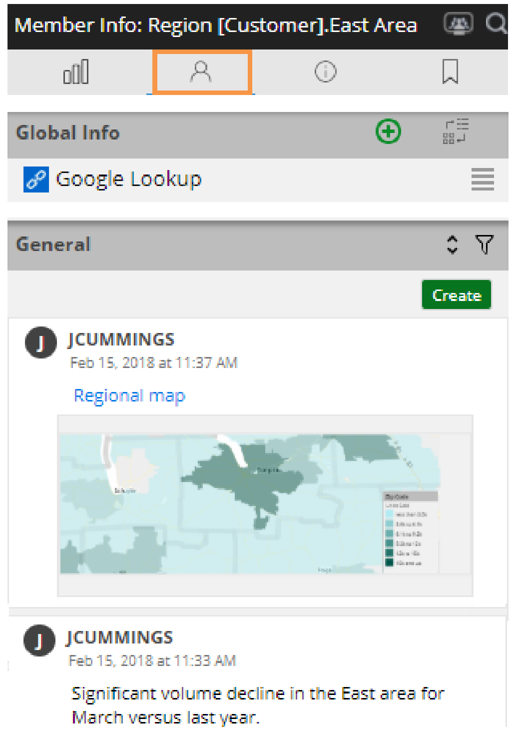
Member Info

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

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

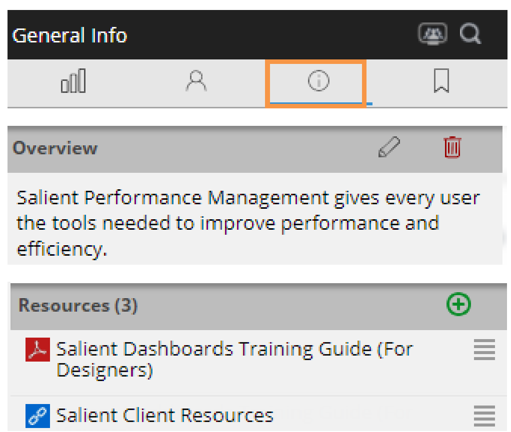
Media examples include news stories, events or related websites.

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



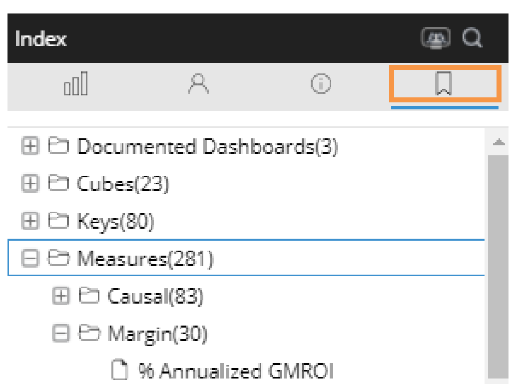
General Info

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



Index/Search

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

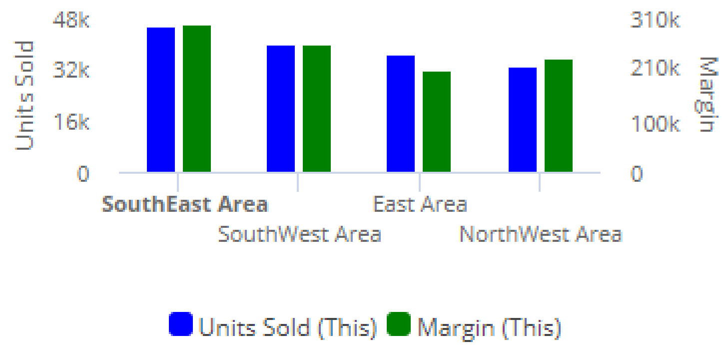


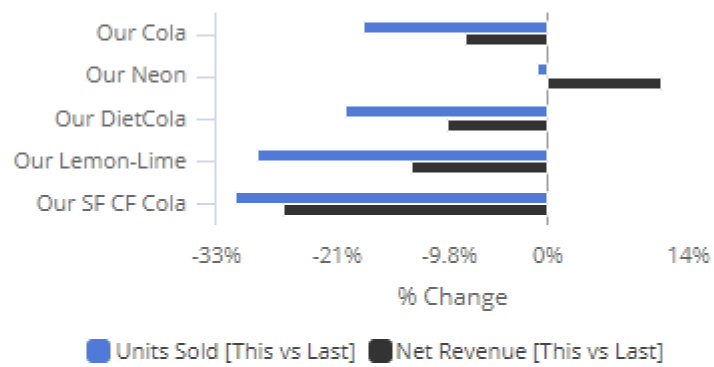
Types of data analysis widgets

A dashboard can include any of the following data analysis widgets. In explore mode (Power Viewers only), you can change the analysis type (see page 43). All users can switch between grid and graph formats (see page 14) (if enabled for the widget).

Analysis type	Examples
Comparative Comparison of members for one or two date ranges; any number of measures	

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



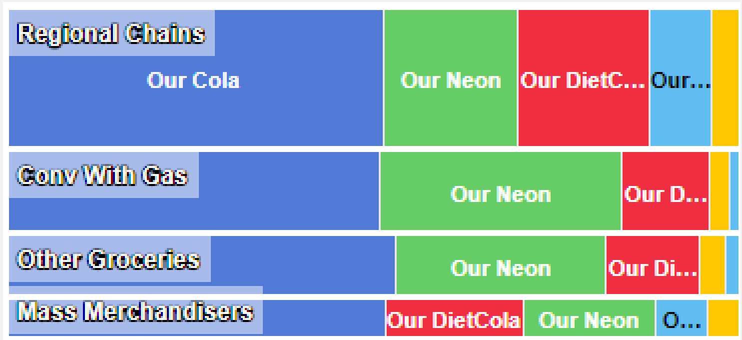


Analysis type	Examples

Crosstab

Comparison grid or graph that organizes data by two different attributes (i.e., dimensions) to examine cross-sections of data.

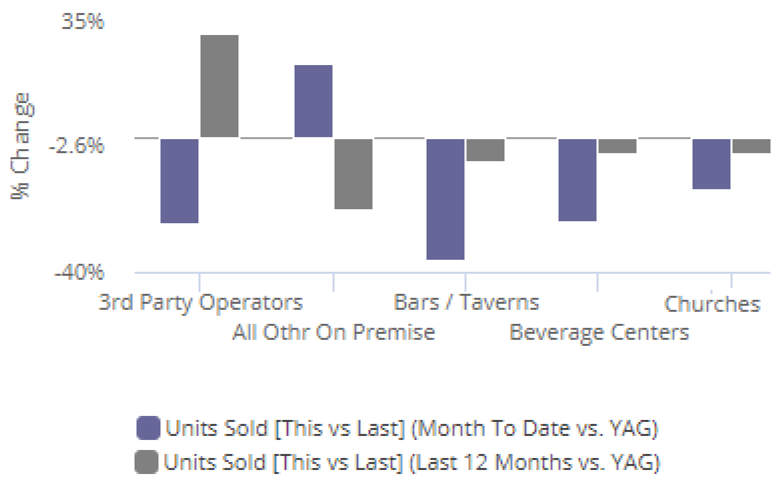
Region	Our Cola	Our Neon	Our DietCola	Our Lemon-Lime
SouthEast Area	27,332	10,090	9,316	2,650
SouthWest Area	27,513	8,239	9,750	3,362
East Area	25,313	10,343	8,364	2,644
NorthWest Area	23,342	9,620	7,189	2,358
Near West Area	5,634	2,352	2,772	868
NorthEast Area	182	10	32	11



Multi Comparative

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

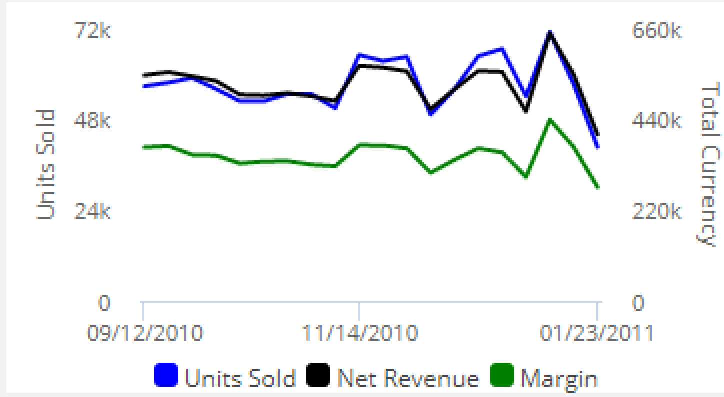
	Month To Date vs. YAG		Last Year vs. YAG	
	Units Sold		Units Sold	
Region	This	% Change	This	Last
SouthEast Area	45,246	-32.31	910,342	772,763
SouthWest Area	40,085	-28.63	762,082	696,724
East Area	36,941	-27.03	706,588	642,115
NorthWest Area	32,800	-37.14	703,359	627,379
Near West Area	13,269	-38.08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



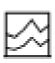
Analysis type	Examples

Trend

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

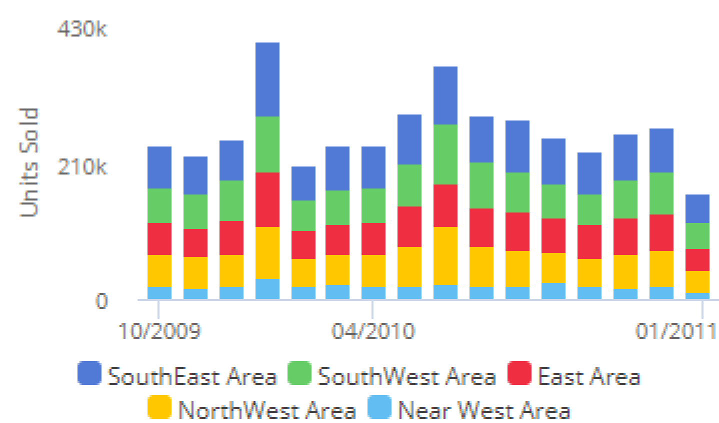


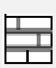
Date	Units Sold	Avg List Price per Unit	Margin
12/12/2010	55,849	12.56	340,300
12/19/2010	64,570	12.49	368,206
12/26/2010	66,486	12.50	358,264
1/2/2011	53,978	12.48	298,829
1/9/2011	70,920	12.40	437,850
1/16/2011	57,179	12.80	371,473
1/23/2011	40,547	13.01	274,320
Total	4,290,796	12.33	24,743,785



Share Trend

Comparison trend for multiple members; either actual values or percent of the total for single measure

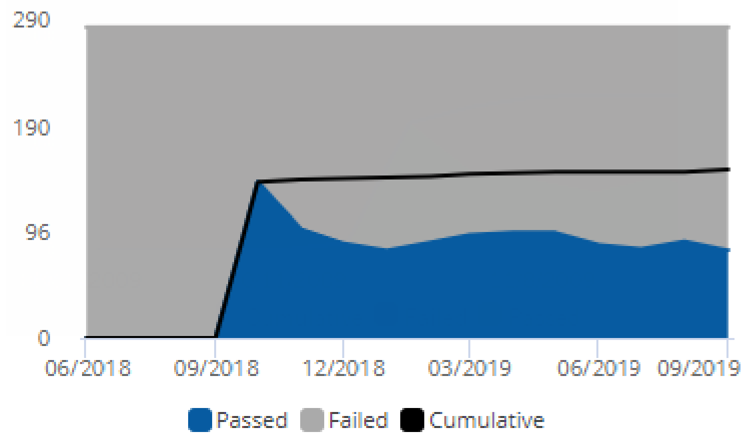
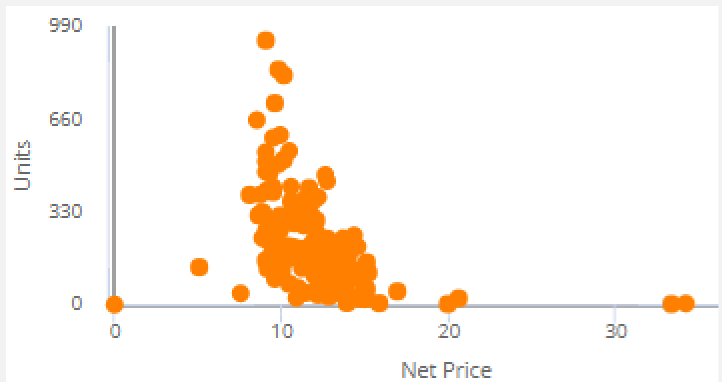
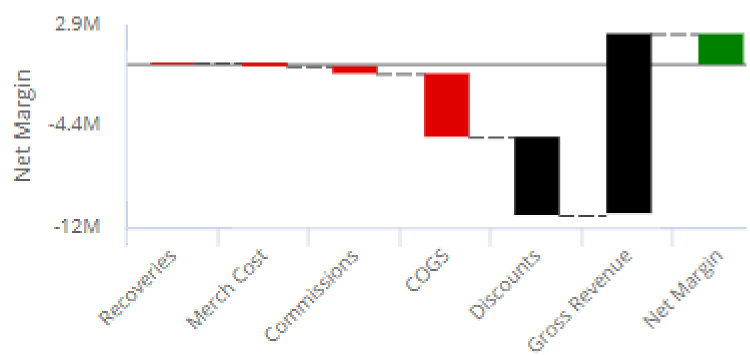


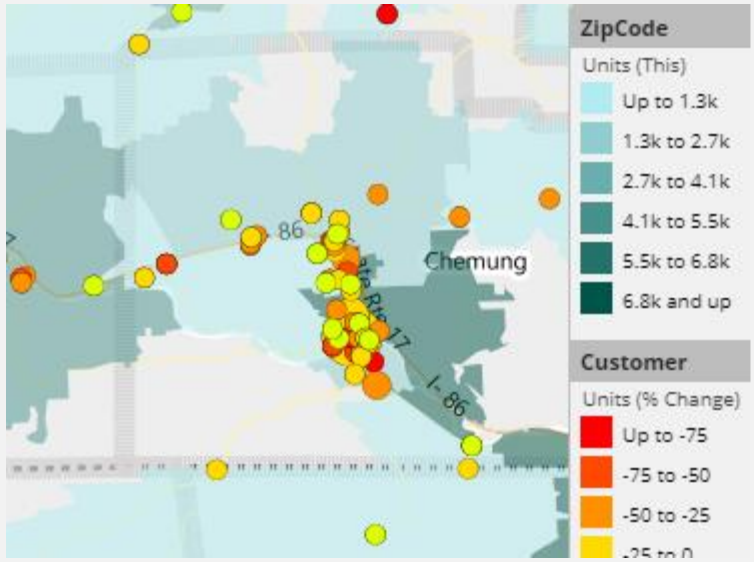
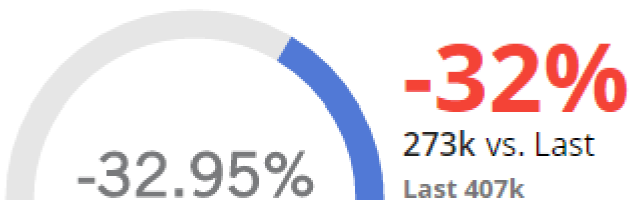
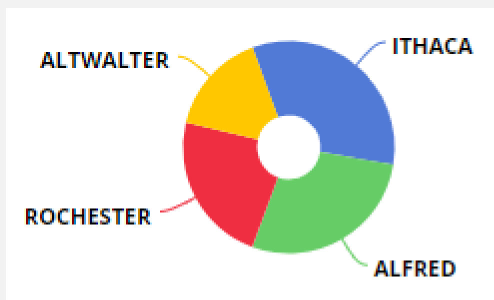


Exception

Pass and fail of key members for an exception test (e.g., customers with units >=1)

Channel	Totals	Passed	% Passed	Failed	% Failed
All Othr On Premise	1,122	69	6.1	1,053	93.9
Industrial	578	206	35.6	372	64.4
Schools	459	206	44.9	253	55.1
Recreation	444	55	12.4	389	87.6
Restaurants	411	161	39.2	250	60.8
Fast Food	395	166	42.0	229	58.0
Other Groceries	283	161	56.9	122	43.1
Colleges	262	28	10.7	234	89.3
Bars / Taverns	212	101	47.6	111	52.4
Total (38)	5,863	1,915	32.7	3,948	67.3

Analysis type	Examples
Exception Time Series Pass and fail of key members for an exception test over time	
Scattergram Plot of key members (e.g., customers) for two measures to show trends and outliers	
Waterfall How the components of a calculated measure affect its make-up	

Analysis type	Examples
Geo Map showing data values and/or change since another date range	
Gauge A simple visual tool showing performance; single measure	
Mix Percent of the total for multiple members for one or two date ranges; any number of measures	

Tips:

- To view record-level data similar to that in SIM's Line Item or Time in Place analysis, you can group the data by Record Details.
- Custom views may be configured to show representations of data beyond the graphs and grids shown here.

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.

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