



**SALIENT®**

# **Salient Dashboards**

## **Training Guide** for Power Viewers

Version 8.4

August 24, 2023

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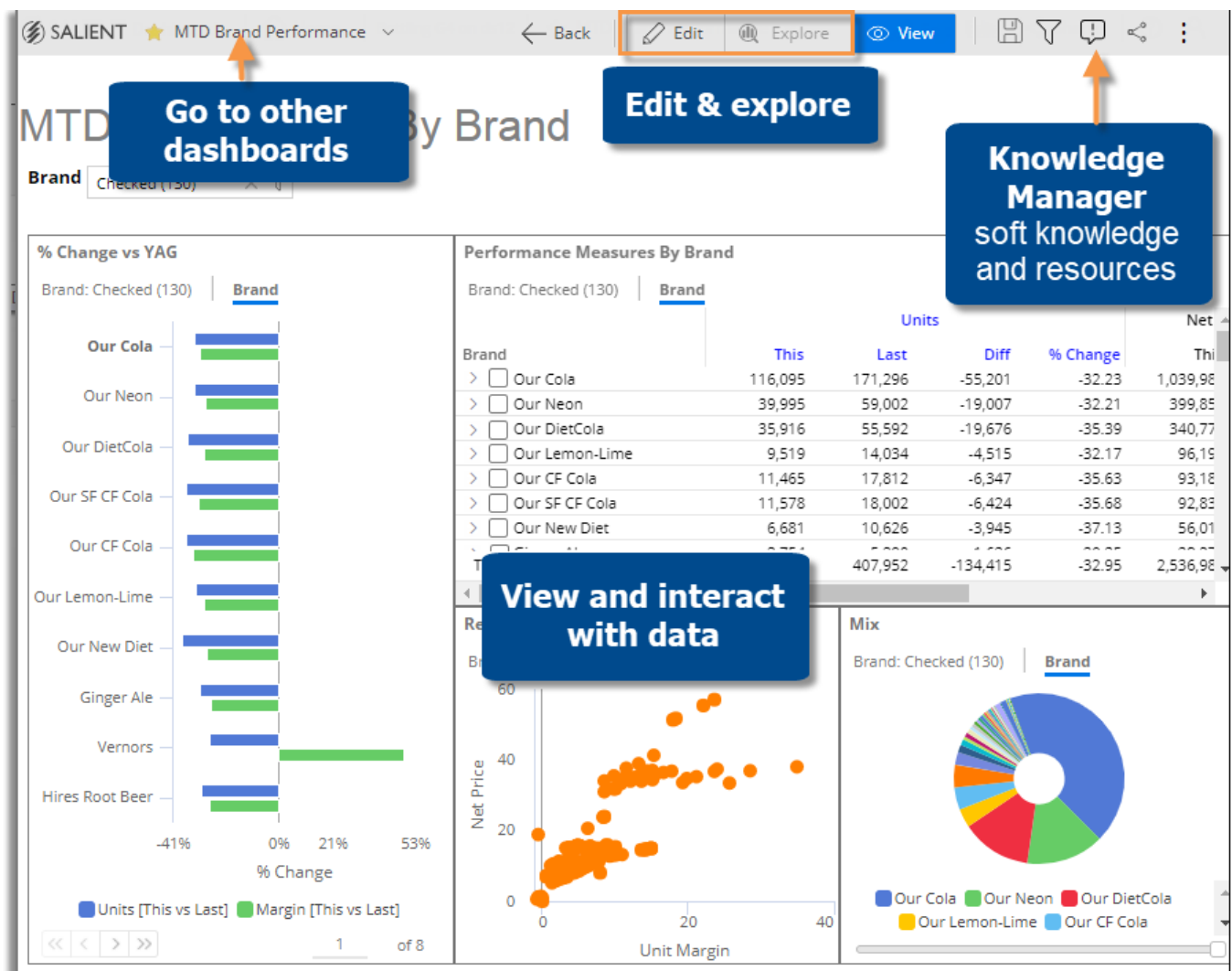
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# About Salient Dashboards

The Salient Dashboards application 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 10) with the customized dashboards and, if they wish, go on to perform their own data investigation in ["explore" mode](#) (see page 63). [Portal dashboards](#) (see page 7) provide easy access to dashboards. In addition, a mobile application is available to provide touch-enabled access on mobile devices.

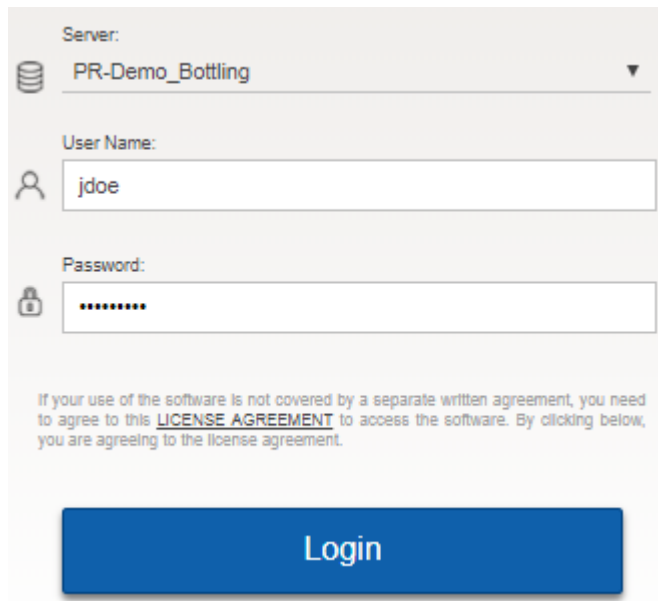


# Getting Started

## 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.

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**.




The login form is a light gray rectangular box. At the top, it has a 'Server:' label with a database icon and a dropdown menu showing 'PR-Demo\_Bottling'. Below this is a 'User Name:' label with a person icon and a text input field containing 'jdoe'. Underneath is a 'Password:' label with a lock icon and a password input field with masked characters. A small disclaimer text is located below the password field, stating that users need to agree to the license agreement. At the bottom of the form is a large blue button with the text 'Login' in white.

*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**.

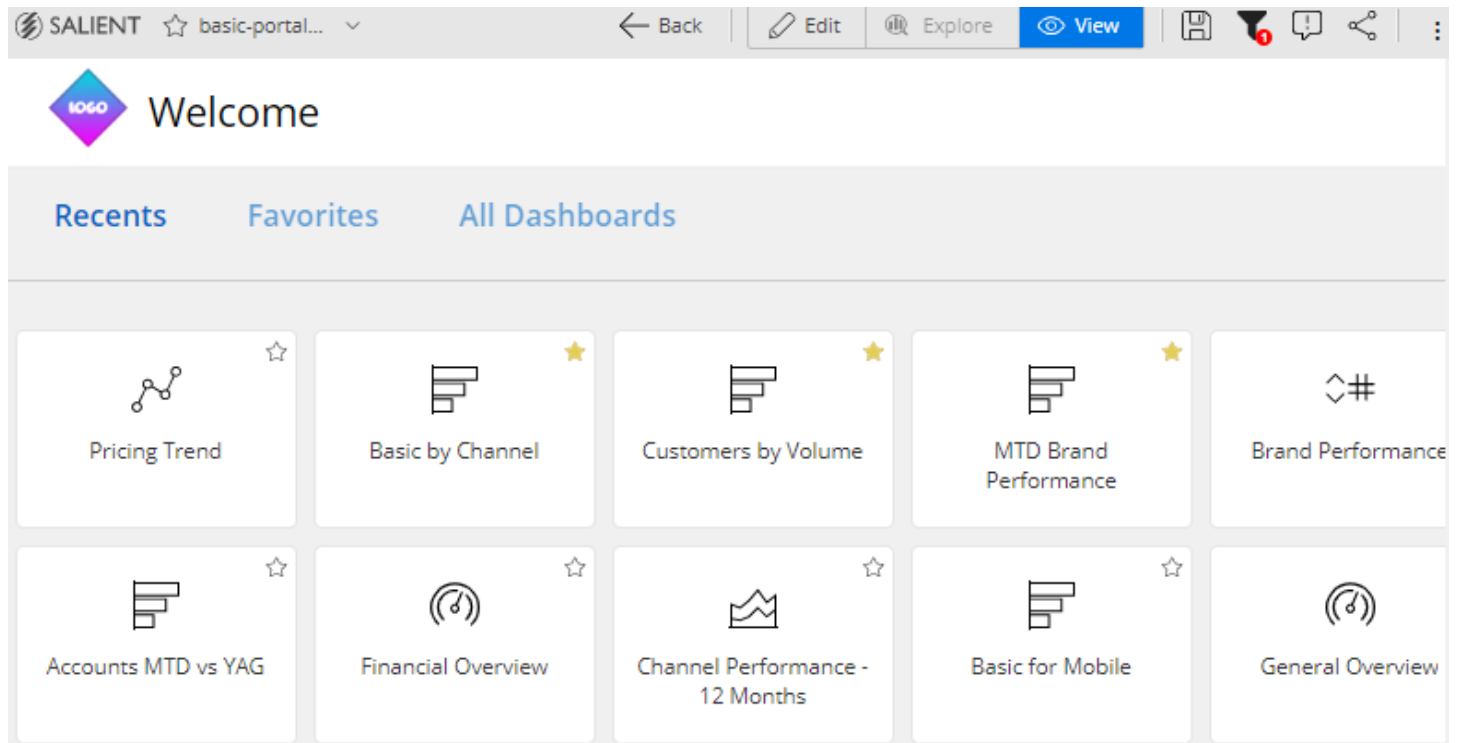
*LDAP login* (i.e., machine login used for authentication): The user name and password entries may not be needed.

### Tips:

- The [portal dashboard](#) (see page 7) 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**.

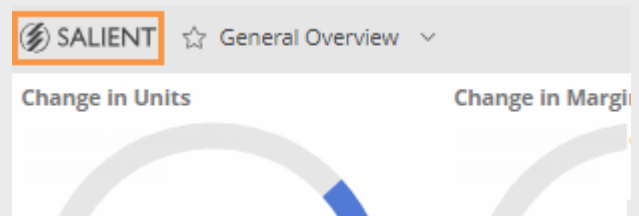
# Portal dashboard

After initial login, you will 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:

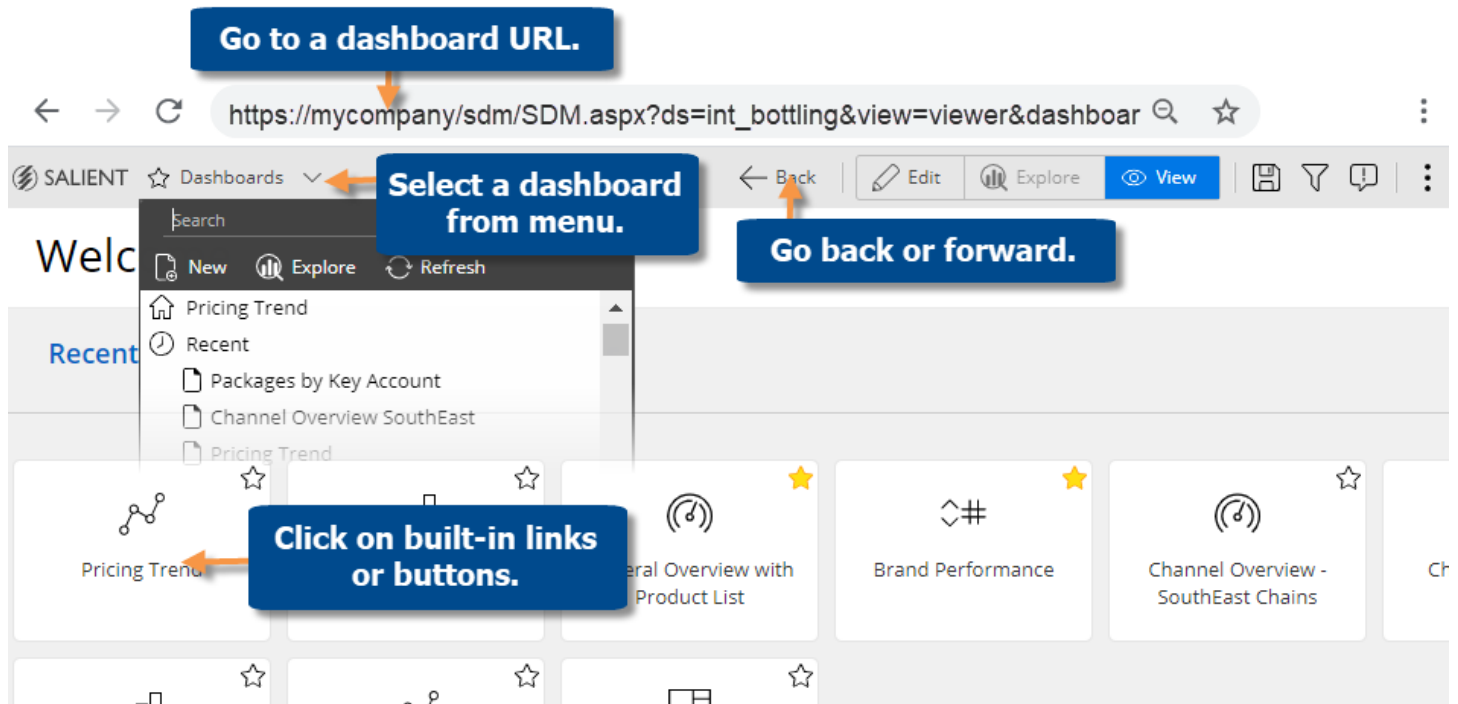
You can go to the portal from any dashboard by clicking **Salient** in the upper-left corner.



User account settings control which dashboards are available.

# How to open a dashboard

Use any of the following methods to open a dashboard.



## URL

Go directly to a specific dashboard by entering its URL in your browser or clicking on a link (e.g., in an email). This may be the dashboard's permanent URL or a temporary URL created by [sharing a dashboard](#) (see page 81).

## 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 (*keyboard shortcut: o*); then, click on a dashboard name.

## 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.

## On a mobile device:

Access dashboards through the Salient mobile app for optimal viewing, or use a browser if you prefer. Going to a dashboard URL will prompt you to choose one of these methods. (To reset your preferred method, clear browser cookies.)



Additional installation and setup are required for the mobile app.

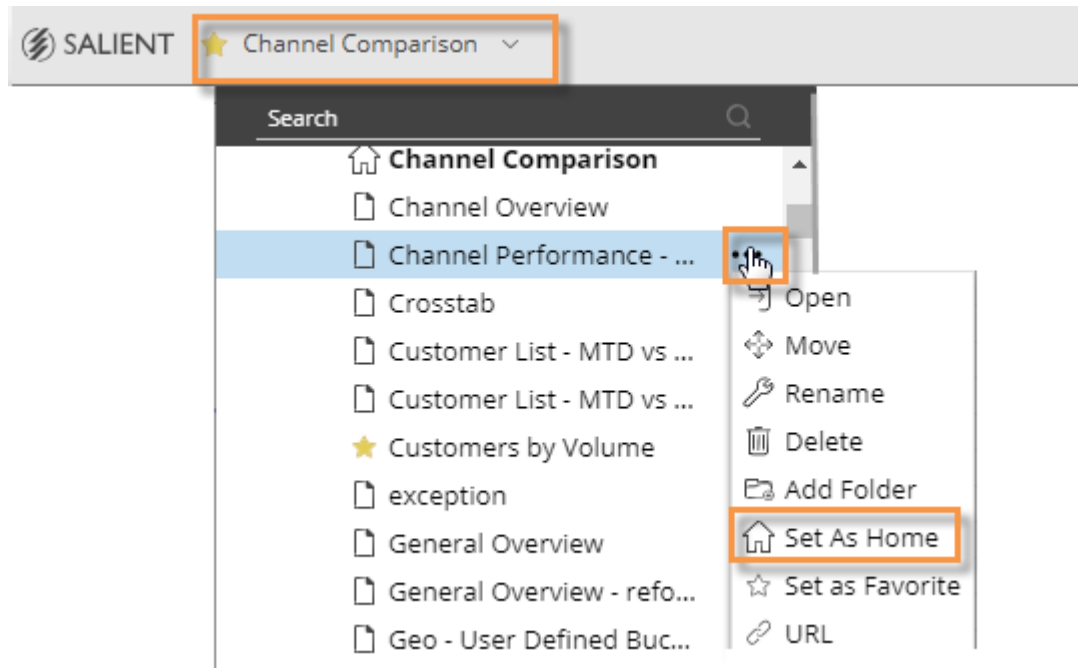


# Select the home dashboard

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.

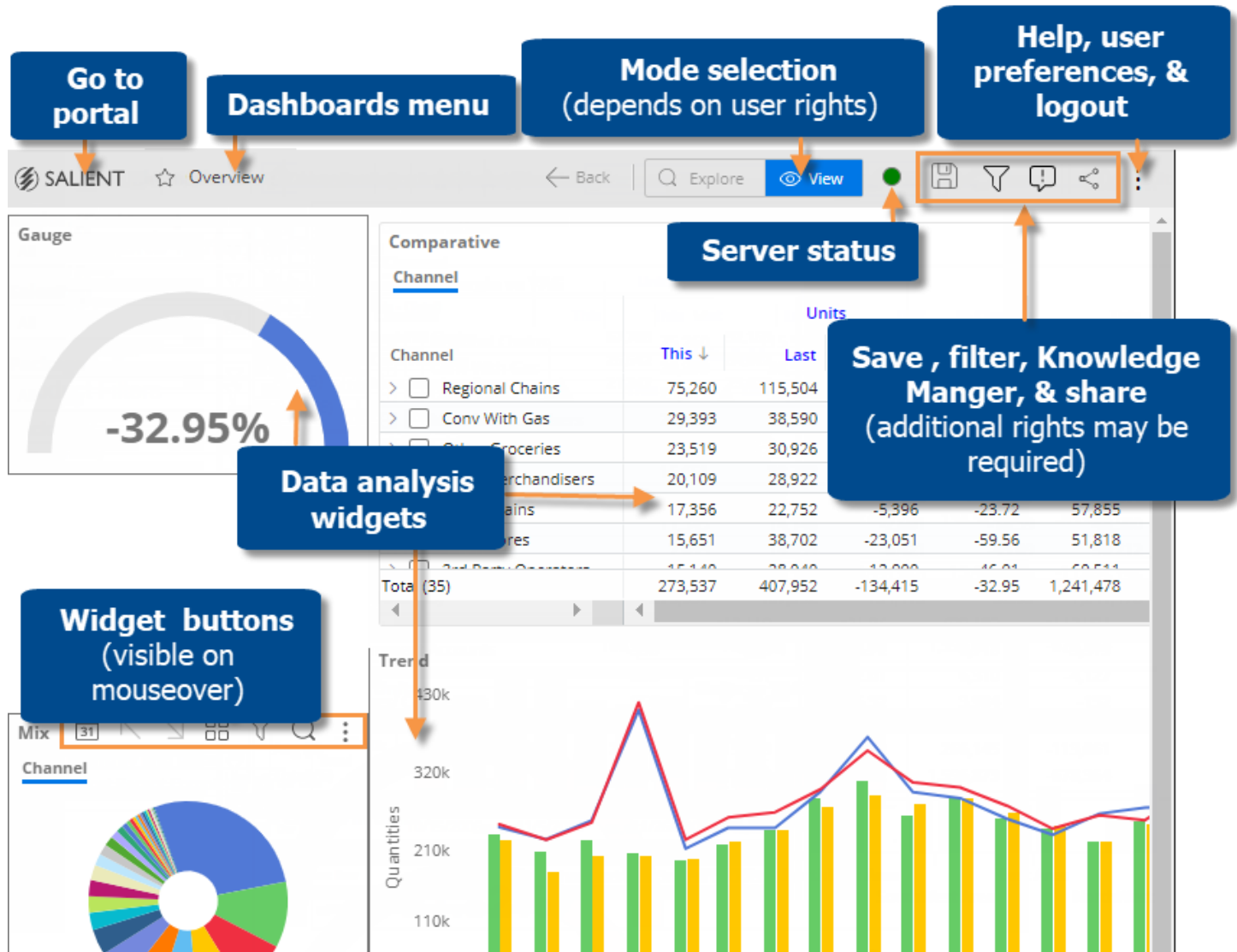


**Tip:** You can also make a dashboard the home dashboard when you save it.

# The Salient Dashboards screen

## View mode

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 further investigate any widget in [explore mode](#) (see page 63) or go to edit mode, which provides dashboard design and editing capabilities.

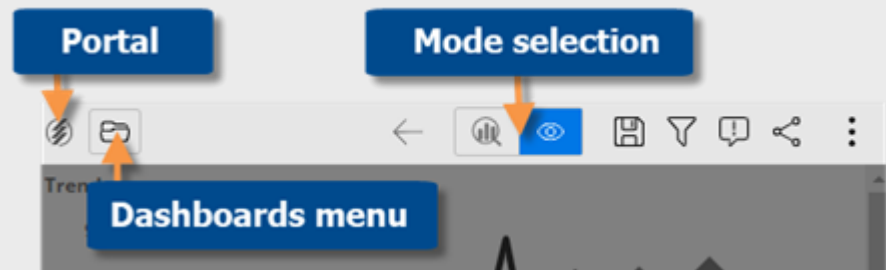


### Tips:

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

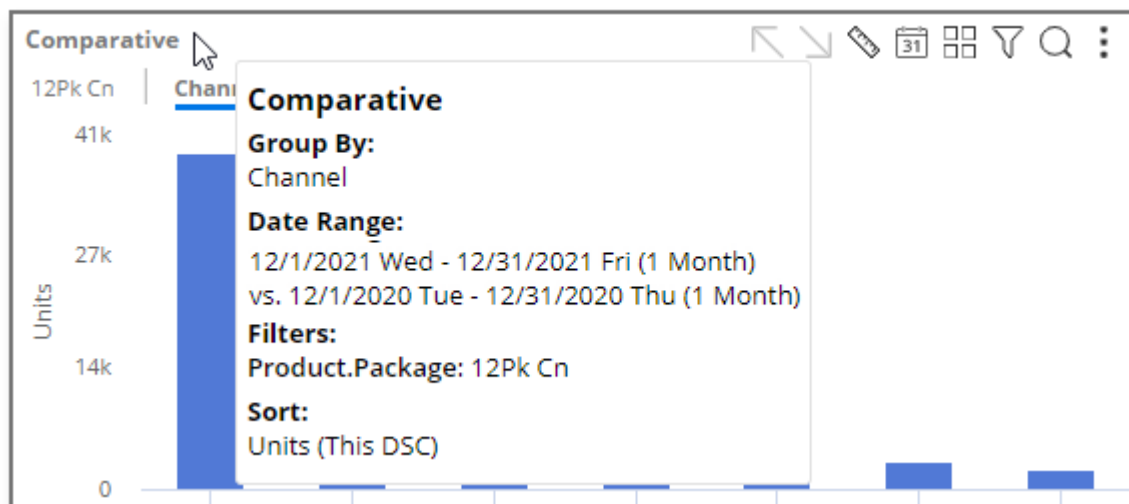
**Tips:**

In a narrow window, the top toolbar is condensed, but the same functions are available:

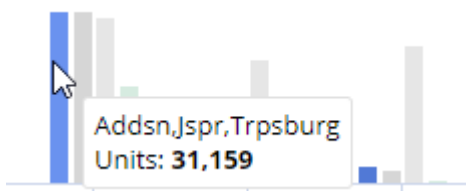


## Dashboard tooltips

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 package, region, etc. You can view a summary of this information by placing your cursor over the widget title bar. The tooltip shows the By, date range, sort, filters, and more.

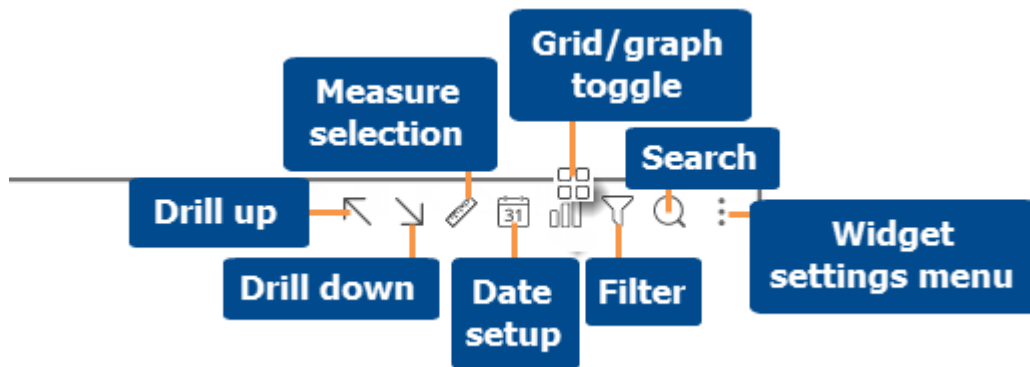


You can also view information about specific items within a widget by placing your cursor over the item. (Some mobile devices may not support mouse-over tooltips.)




## Widget buttons

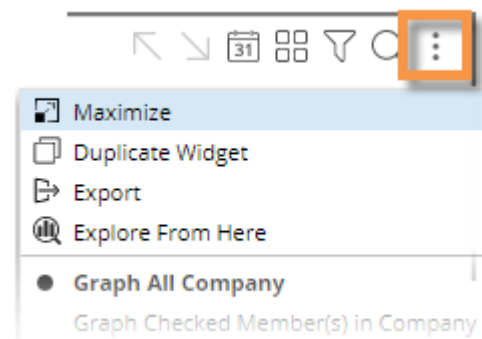
The widget toolbar buttons in the widget's upper-right corner (on mouseover) let you change and interact with the widget.










- Date setup, measure selection, 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:





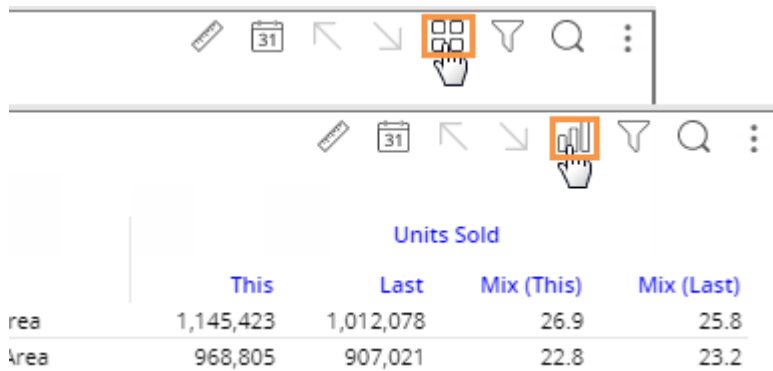
-  Maximize - Enlarges the widget to the maximum extent of the dashboard.
-  Restore Down - Returns a maximized widget to its original size.
-  Duplicate Widget (see page 68) (not available in view mode) - Create a widget exactly like the original. In explore mode, the widget will be expanded in a new tab.
-  Export (see page 81) data to UXT, Excel, or CSV (if enabled)
-  Explore From Here - Expand the widget in [explore mode](#) (see page 63), which maximizes the widget and provides capabilities for data analysis and investigation (e.g. change analysis type).
-  Notify - Create rules for sending data-based notifications (additional rights required).
- Show in Mobile and Hide for Phone - Choose whether to display the widget in the mobile app.
- 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

Most data analysis widgets are available in grid and graph formats.

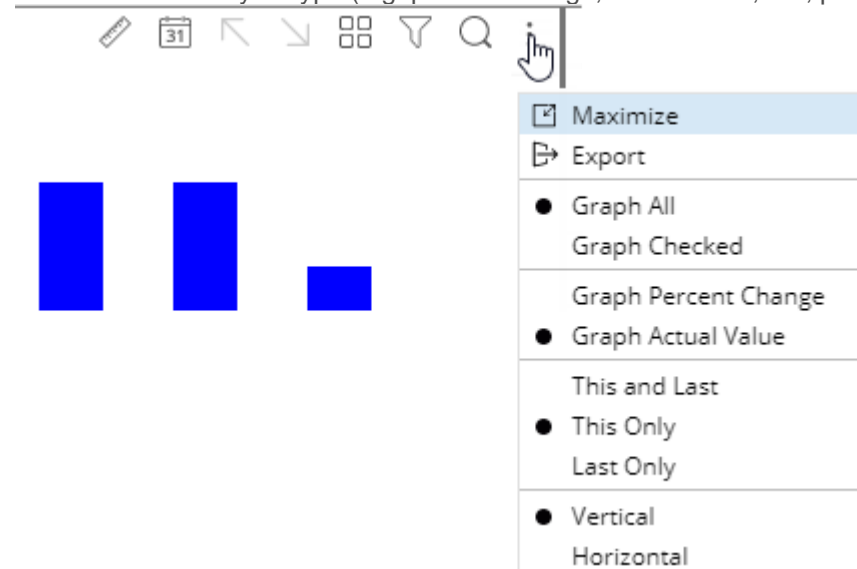
To toggle between a grid and a graph

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.

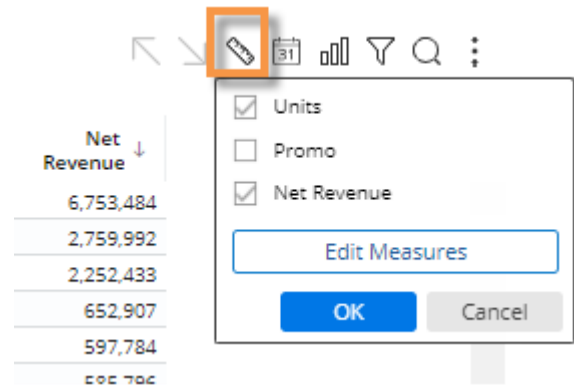
# Select measures

You can select measures using the measure selection  tool in any mode of Salient Dashboards. (This tool may be turned off.)

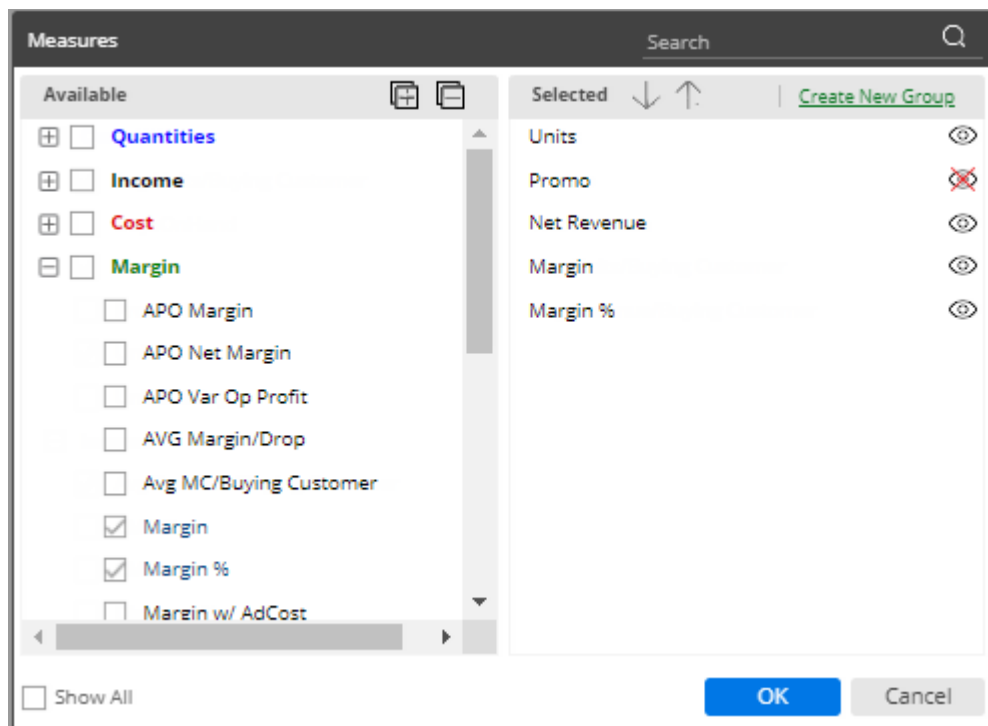
To select measures

1. On the widget toolbar, click the  button (visible on mouseover). If the widget only has one measure, this will take you directly to the Measures window (Step 3).
2. In the pop-up menu, check the boxes of the measures to show and clear the boxes of the measures to hide; then, click OK. This menu lists the measures that have been added to the widget. If you don't see the desired measure(s), click on **Edit Measures** and continue to Step 4.

Note: The ability to edit measures in view mode may be restricted by dashboard or user account settings.



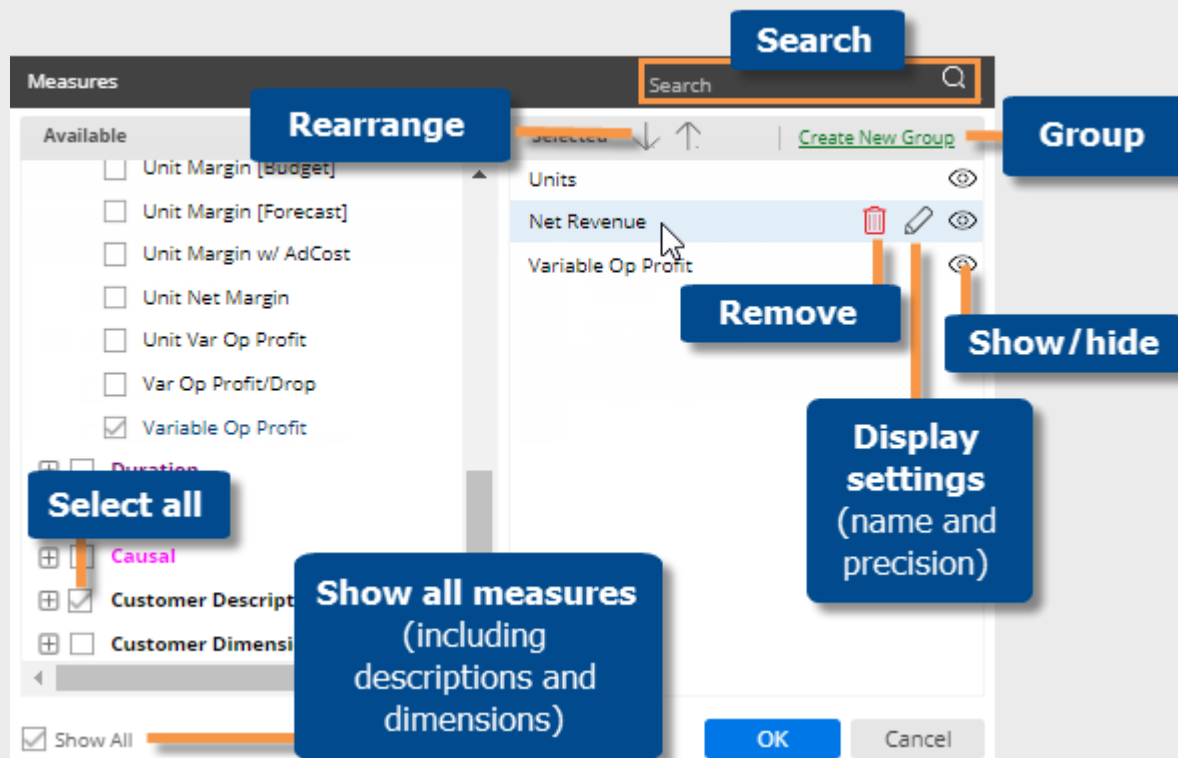
3. *To edit measures:* Expand a data category in the left pane and then check the box(es) of the individual measure(s) or data categories to add. The selected measures appear in the right pane. Click OK when you are finished editing measures.





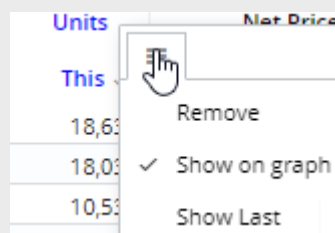
**Tips:**


In the Measures area:

- The tools in the right pane allow you to search for a measure, remove a measure, rearrange measures, change measure display settings, create measure groups, and show/hide measures.
- 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. This option also makes key descriptions (e.g., name, address, etc.) and dimensions available (requires that the key list is selected as a Group By).



To hide a subcolumn (e.g., This or Last), click the menu icon  in its heading and select **Remove**. To add This or Last back, click the menu icon  and select **Show This** or **Show Last**.




In an Exception widget, the measure selection tool  lets you show or hide individual exception columns (Passed, Passed %, etc.). The Measures window (i.e., Edit Measures) controls the measures that will be shown when listing members.

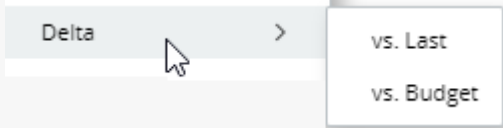
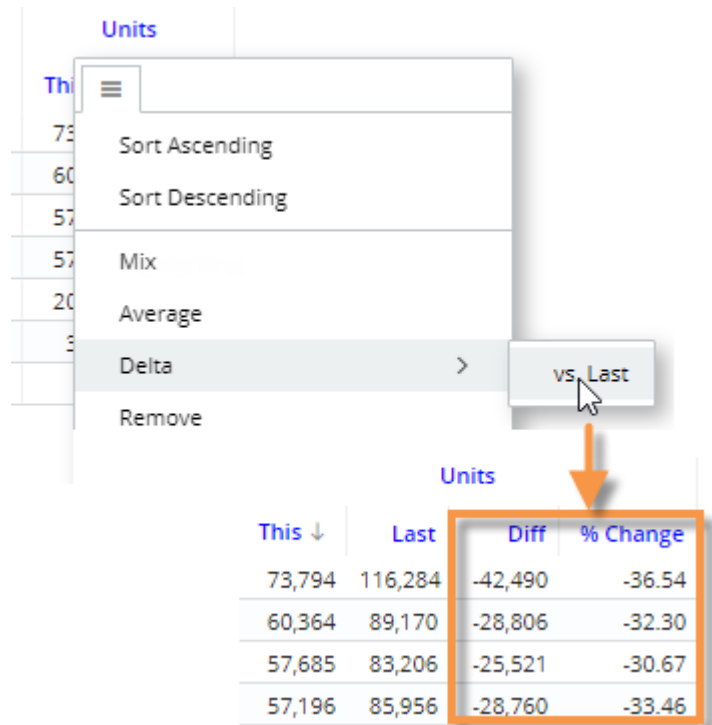
# Insert difference and percent change

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 13) 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 menu icon . 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.

A screenshot showing a 'Units' menu with options: 'Sort Ascending', 'Sort Descending', 'Mix', 'Average', 'Delta', and 'Remove'. The 'Delta' option is highlighted. To the right of the menu is a button labeled 'vs. Last' with a mouse cursor hovering over it. An orange arrow points from this button down to a table below.


This ↓	Last	Diff	% Change
73,794	116,284	-42,490	-36.54
60,364	89,170	-28,806	-32.30
57,685	83,206	-25,521	-30.67
57,196	85,956	-28,760	-33.46

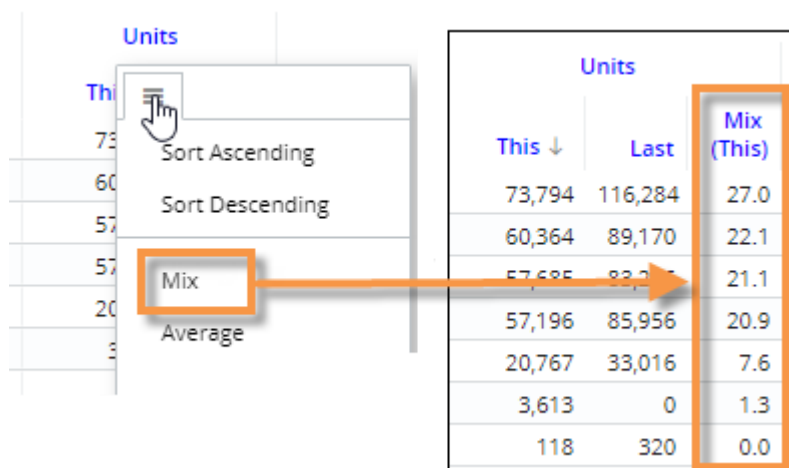


# Insert mix

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 13) if you haven't already.
2. Place your cursor on the column for which you want to add mix values.
3. Click the menu icon .
4. On the pop-up menu, select Mix.



**Tip:** Additional options are available in Crosstab grids.

- Column (Mix - C) - percent of the total of all columns within the given row.
- Row (Mix - R) - percent of the total of all rows within the given column.
- Total (Mix - T) - percent of the total of all rows and columns.

For example, the following shows Mix for Mocha Coffee in the SouthEast region:

	Mocha Coffee				Total	
	Units				Units	
	This	Mix - C (Units)	Mix - R (Units)	Mix - T (Units)	This	Mix (Units)
SouthEast Area	185	40.3	69.0	28.4	459	70.5
SouthWest Area	34	39.5	12.7	5.2	86	13.2
East Area	25	45.5	9.3	3.8	55	8.4
NorthWest Area	24	48.0	9.0	3.7	50	7.7
NorthEast Area	0	0.0	0.0	0.0	1	0.2
Total (5)	268	41.2	41.2	41.2	651	100.0

Mix - C = 185 (Mocha Coffee in SouthEast)/459 (All brands in SouthEast) x 100% = 40.3%


Mix - R = 185 (Mocha Coffee in SouthEast)/268 (Mocha Coffee in all regions) x 100% = 69.0%

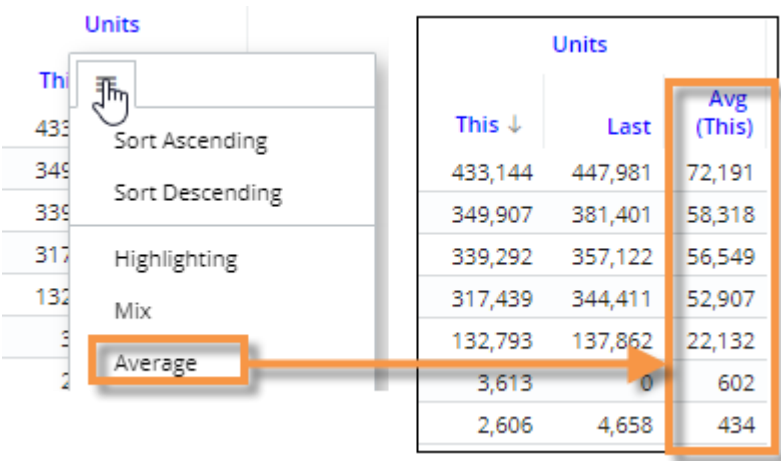
Mix - T = 185 (Mocha Coffee in SouthEast)/651 (total for all brands in all regions) x 100% = 28.4%

# 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 6 months, the average column would show the average value per month.

To insert average

- 1. [Switch to the grid](#) (see page 13) 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 menu icon  and then, from the pop-up menu, select **Average**.



# Move and resize columns

To move columns

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

Units		Net Revenue		Margin	
This ↓	Last	This	Last	This	Last
73,794	116,284	66,972	1,055,429	32,384	497,780
60,364	89,170	53,324	809,507	26,234	391,334
57,685	83,206	50,061	753,924	24,646	363,452

To resize a column

Click and drag the right side of the column to the desired width.

**Tip:** To go back to the default width (i.e., autosize), click the menu icon at the top of the column and select **Reset to Auto Width**.

Customer Count w/Sales Units					
% Change	This	Last	Diff	% Chan	
7.12	411	433	-22	-5.08	

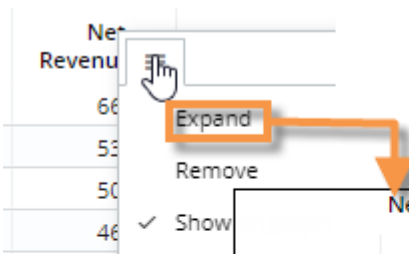
# Expand a calculated measure

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.



The screenshot shows a table with a column header 'Net Revenue'. A mouse cursor is hovering over a small drop-down arrow next to the header. A pop-up menu is visible with the options 'Expand' (highlighted with an orange box and an orange arrow pointing to the expanded table) and 'Remove'. Below the menu, there is a 'Show' button with a checkmark.

Net Revenue		
Discounts	Gross Revenue	Net Revenue ↓
-21,255	88,227	66,972
-16,877	70,200	53,324
-17,164	67,225	50,061
-19,005	65,291	46,286

# 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 (i.e., Last). Most widget types total data over the entire range, while others show each date in the range individually.

**Main date range**


**Previous date range**

Comparat  
Region [Customer]


Tip: You can place your cursor over the title bar to see date range details.

	Units	
	This	Last
	73,794	116,284
	60,364	89,170
	57,685	83,206
	57,196	85,956
Near West Area	20,767	33,016

## 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.

Units Sold

This	Last
168,646	247,354

**Resolution**

**Day filters**

Day Filters

Name: Mos

Resolution: Month Week Ending: Sunday

**Main date range (This)**

**This**

Month To Date Last Month Last 6 Months Year To Date Last Year Custom Fixed

Start: 01/01/2011 End: 01/31/2011

< | 1 >

☐ Most Recent Complete

**Previous date range (Last)**

**Last**

YAG Prior Time Frame Prior Month Prior Year Month To Date Last Month Last 6 Months

Year To Date Last Year Custom Fixed

Start: 01/01/2010 End: 01/21/2010

< | 1 >

Comparison: Matching time frames

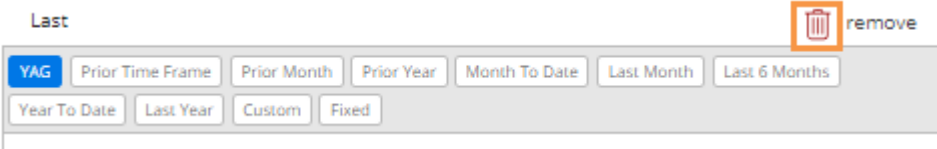


**Comparison for incomplete timeframes**

Reset to saved date range (view mode only)

Reset OK Cancel

Link/unlink widget's date range


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 <b>This</b> , 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 <b>Day Filters</b> 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	<p>Under <b>Last</b>, click the button of the previous date range (e.g., YAG). The available options depend on the resolution selected above.</p> <p>If the dialog does not include a Last section, click <b>Add Date Range</b> at the bottom of the dialog to include a previous date range if desired.</p> <p><b>Tip:</b> 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.</p> 
Comparison for incomplete timeframes	<p>A <b>Comparison</b> option at the bottom of the dialog controls the selection of the previous (Last) date range when This date range is incomplete.</p> <ul style="list-style-type: none"> <li>• <b>Matching time frames</b> - 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.</li> <li>• <b>Complete last period</b> - 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.</li> </ul>
Linked dates (i.e., use dashboard date)	<p>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.</p> <p> - 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.</p> <p> - indicates that the widget's date range is unlinked and, therefore, has its own stand-alone date range.</p>

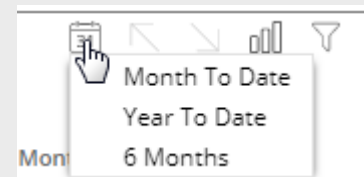
### Tips:

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  in the widget's toolbar and then select the name of the date range.

Multi Comparative date ranges cannot be linked to other widgets.



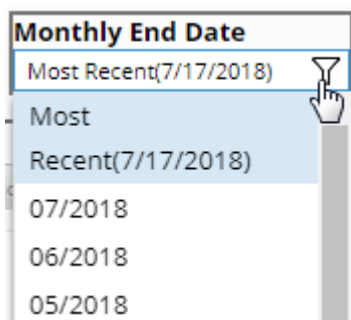
## End date selection

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.

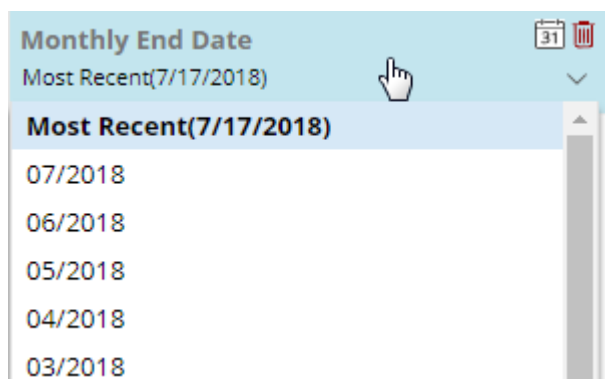
To select the dashboard end date

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 24).
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:

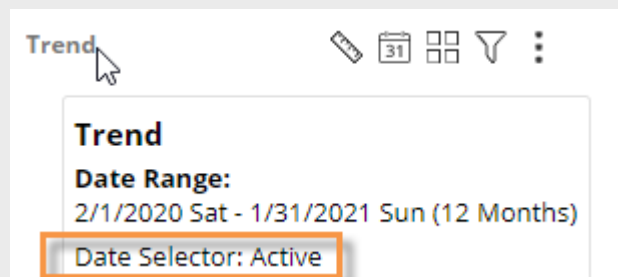


### Tips:


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.

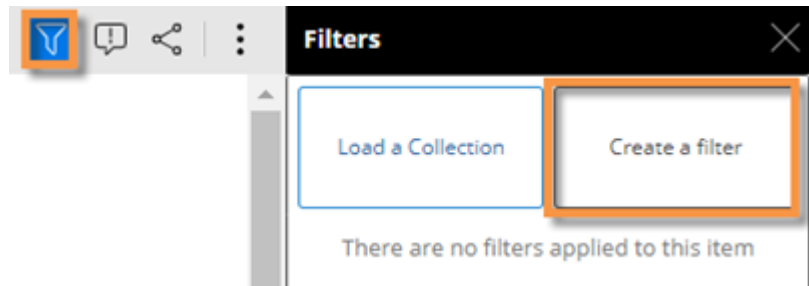
Depending on how it has been set up, the date selector may include a Most Recent or Most Recent Complete option.

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**.



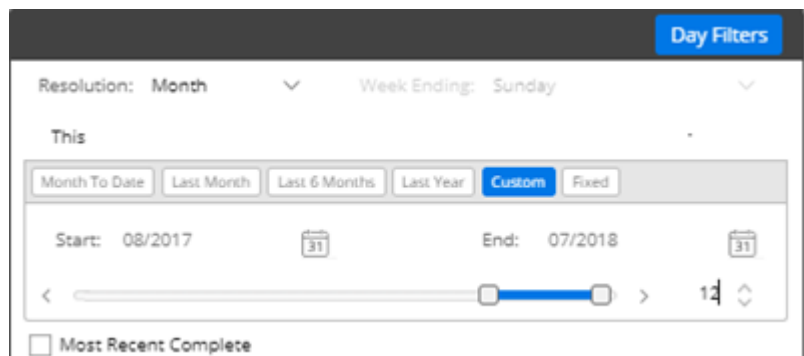
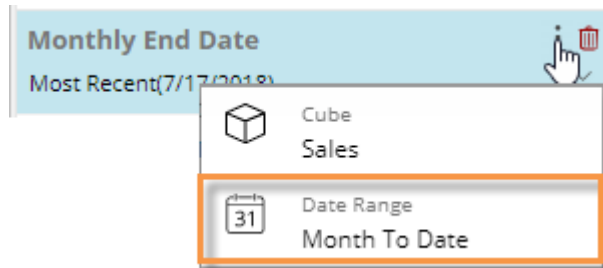
4. Set the dates that will appear as choices in the menu.

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.

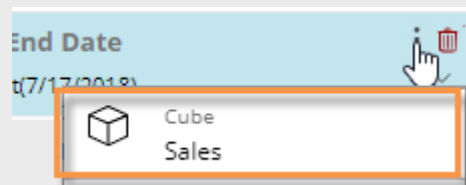


### Tips:

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 can 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. (Group By selection may be turned off.)

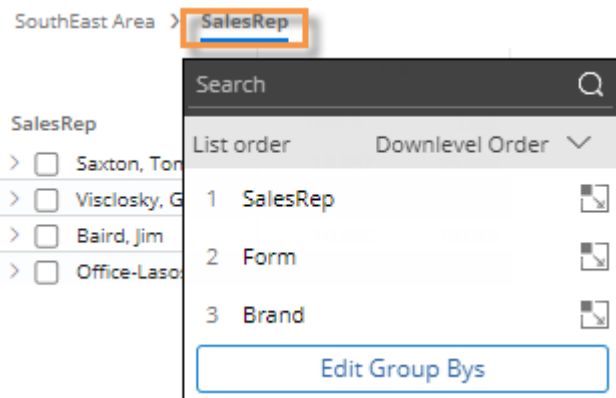
**1st By**


**Next Bys (2nd By, 3rd By, 4th By, etc.)**

Region	Units ↓	Net Revenue
> <input type="checkbox"/> SouthEast Area	69,324	622,179
> <input type="checkbox"/> SouthWest Area	65,067	553,981
✓ <input type="checkbox"/> East Area	58,896	464,027
> Gordon, Pat	20,528	162,706
✓ Turner, Michael	16,552	106,542
> Cans	10,939	61,933
✓ PET	5,480	43,493
Our Cola	2,277	17,813
Our DietCola	896	7,109
Our Neon	749	6,138
Our SF CF Cola	372	2,813

To select the 1st By

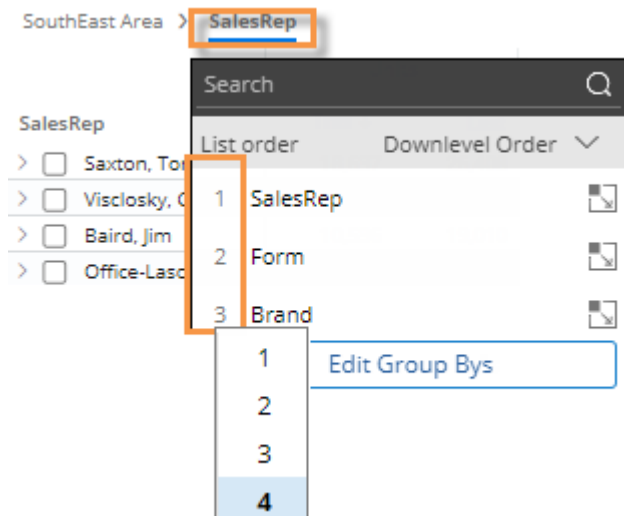
1. Click the By in the breadcrumb path (underlined). If the widget only has one Group By dimension, this will take you directly to the Group By window, where you can [edit dimensions](#) (see page 26).
2. In the pop-up menu, click the name of the dimension to use for grouping the data at the highest level. To search for a dimension, enter the first few characters at the top of the menu. This menu includes dimensions that were built into the widget during dashboard creation. If you do not see the dimension in the list, click on **Edit Group Bys** to [access more dimensions](#) (see page 26).



**Tip:** You can click  to turn on auto-expand for a dimension. This will expand all members to the next By. The results will be different depending on the type of view: [standard grid \(i.e., tree\)](#) (see page 28); [flat view grid](#) (see page 30); or [expanded graph formats](#) (see page 31).

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

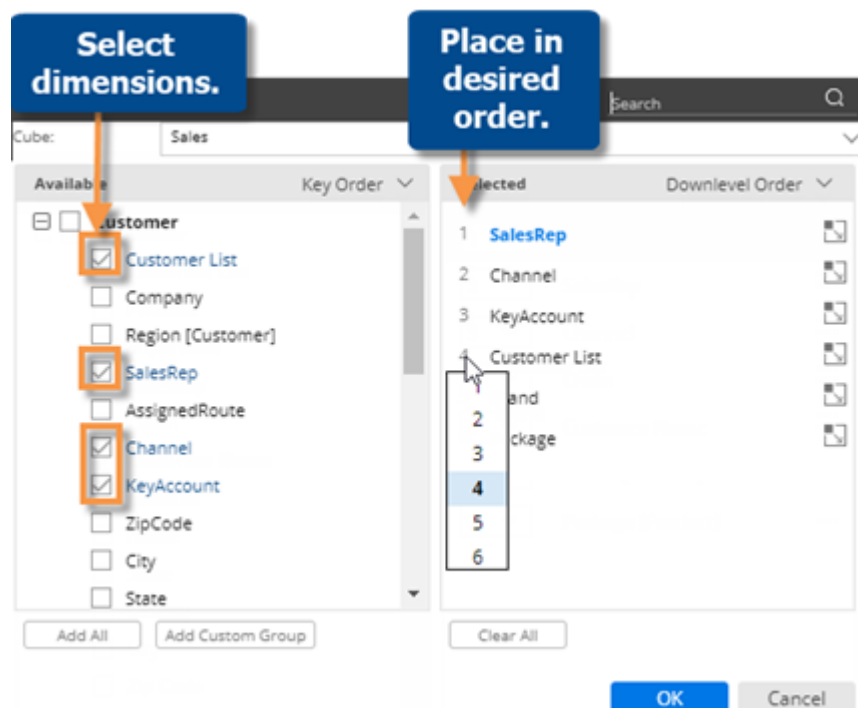
1. Click the By in the breadcrumb path (underlined).  
If the widget only has one Group By dimension, this will take you directly to the Group By area (see below).
2. In the pop-up menu, click on a number and select from the drop-down to adjust the drill order, or click and drag to place dimensions in the desired order. If you do not see a dimension in the list, click on **Edit Group Bys** to access all available dimensions (see below).
3. Click **OK**



To edit the Bys

After clicking on the **Edit Group Bys** button in the menu (see above), you can access all dimensions.

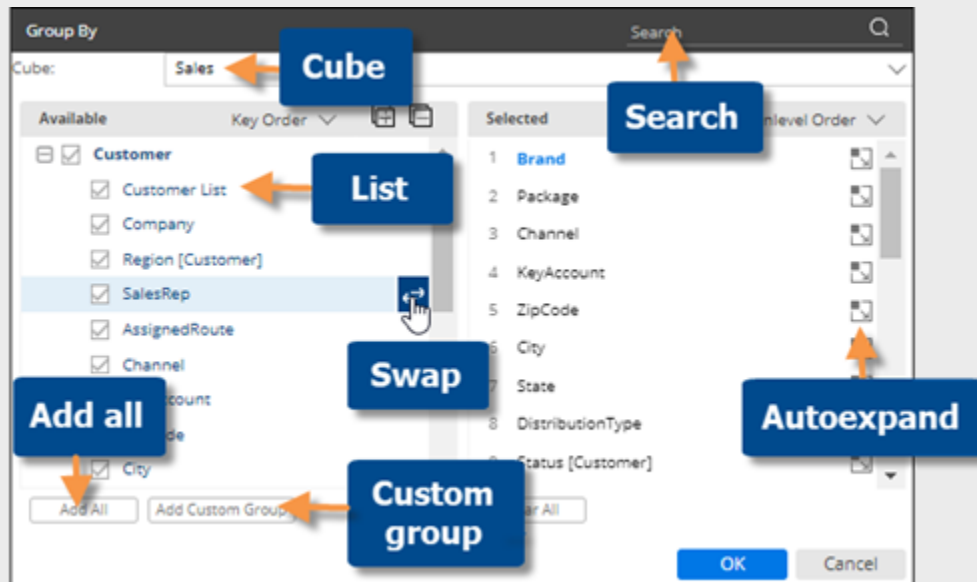
1. Check the box(es) of the dimension(s) you wish to use for grouping the data at any level (1st By, 2nd By, 3rd By, etc.). If the desired By is not listed, you may need to change the data cube at the top of the window.
2. In the right pane, place the selected dimensions in the desired order for grouping data, drilling, and expanding members. You can drag and drop dimensions or click the dimension's number to select from a menu.
3. Click **OK**.



**Tips:**

In the Group By window:

- You can swap the selected dimension in the right pane with an available dimension in the left pane to quickly add it.
- You can add all dimensions using a button.
- To view key-level details (e.g., customers), group the data by the "List" option.
- To view record-level details, group the data by Record Details, which is located after all keys/dimensions in the left pane.
- You can add a custom group to create your own custom method for grouping and comparing data.



# Expand data

## Tree expansion

In standard grids that compare members, you can expand one or more members to see subgroupings underneath them. You can expand the 1st By dimension to see the 2nd By, the 2nd By dimension to see the 3rd By, etc. You can expand members individually or auto-expand all members of a dimension (only available in some analysis types).

Region		Units		
		This ↓	Last	% Change
> <input type="checkbox"/>	SouthEast Area	69,324	64,719	7.12
✓ <input type="checkbox"/>	SouthWest Area	65,067	60,886	6.87
> <input type="checkbox"/>	Stark, Solomon	9,527	18,909	3.27
> <input type="checkbox"/>	Davis, John	5,840	15,009	5.54
✓ <input type="checkbox"/>	Keller, Brad	11,730	9,842	19.18
> <input type="checkbox"/>	S.Newburg Dist-North	4,571		29.88
> <input type="checkbox"/>	Obeck Inc. North	3,032		2.97
✓ <input type="checkbox"/>	Variety Gifts	1,403	1,434	-2.16
	Our Cola	705	817	-13.71
	Our DietCola	128		49.22
	Our Neon	211		-19.91
	Our SF CF Cola	53	42	26.19
	Our CF Cola	52	56	-7.14
	Our Lemon-Lime	43	29	48.28

To expand members individually

Click the > arrow beside the member(s) that you want to expand.



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

**Tip:** The widget must have multiple Group By dimensions; otherwise, the > arrow is not available.

Region		Units	
		This ↓	Last
> <input type="checkbox"/>	SouthEast Area	69,324	64,719
> <input type="checkbox"/>	SouthWest Area	65,067	60,886
> <input type="checkbox"/>	East Area	58,896	55,051
> <input type="checkbox"/>	NorthWest Area	56,410	50,748
> <input type="checkbox"/>	Near West Area	20,919	21,148

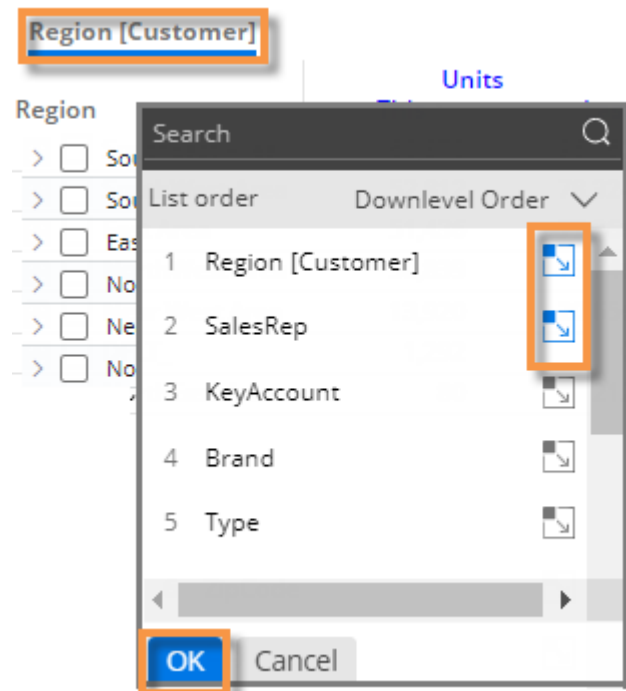
To auto-expand all members of a dimension or key

(only available in Comparative, Multi Comparative, and Mix grids)

1. Click the By in the breadcrumb path (underlined).
2. In the pop-up dialog, click the  button beside the dimension(s) and/or key(s) that you want to expand to the next level. The icon is blue  when auto-expand is on.

*If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.*

3. Click **OK**.



#### Tip:



Depending on the grid page size, you may not be able to see all available 2nd By dimension members at once. In this case, you can increase the grid page size or [change the sort](#) (see page 37) to bring the desired members closer to the beginning of the list.

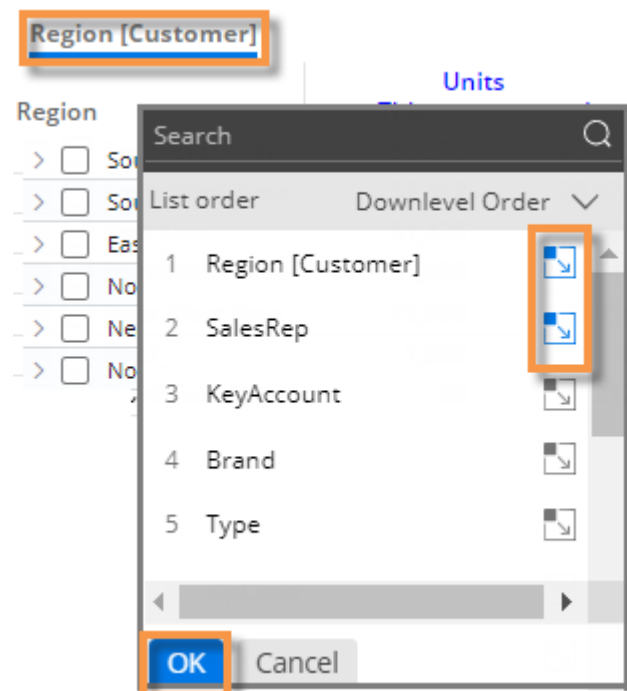
## Auto-expansion in flat view

In a "flat" view, dimensions and keys can be expanded into columns to provide detailed, cross-key information. Each unique combination of members (i.e., attributes) has its own row. You can interact with rows by drilling, sorting, and more, to investigate performance.

1st By			2nd By, 3rd By, etc.					
Region	SalesRep	KeyAccount	This ↓	Last	Diff	% Change	Diff	% Change
> East Area	Gordon, Pat	All Others	8,715	7,527	1,188	15.78	23	-19.43
> East Area	Turner, Michael	Variety North	8,073	5,820	2,253	38.71	97	-46.29
> SouthEast Area	Office-Lasoski	Serv-Rite	7,916	6,259	1,657	26.47	20	-28.23
> NorthWest Area	Allen, Chris	Village North	7,850	3,640	4,210	115.66	87	-13.13
> SouthEast Area	English, John	S.Newburg Dist-North	7,518	5,578	1,940	34.78	80	-24.71
> SouthWest Area	Keller, Brad	S.Newburg Dist-North	5,937	4,571	1,366	29.88	39	-21.70

To expand in a flat view

- Start with one of the following widget types in grid format: Comparative, Multi Comparative, or Mix. The grid type should be "flat view." The grid type is pre-built into the dashboard. You can also select the [grid type](#) (see page 70) in explore mode.
- Select dimensions and/or keys.
  - Click the By in the breadcrumb path (underlined) or open the Group By area in the toolkit.
  - Place dimensions and/or keys in the desired order. This will control the order of columns in flat view (e.g., 1st By will be first column).
  - Click the  button beside the level(s) that you want to auto-expand (i.e., show next dimension as separate column). The icon is blue  when auto-expand is on.
  - Click **OK**.



### Tips:

If you skip a level for auto-expansion, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.

**Tips:**


You cannot auto-expand down to record details; instead, drill down, change the Group By, or expand items individually.

## Auto-expansion in graphs

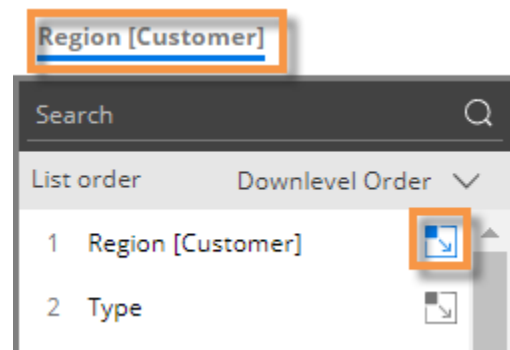
In the following graphs, dimensions and keys can be expanded to see granular results.

- Comparative and Multi Comparative graphs (see below) - visualize performance of subgroupings of dimensions/keys.
- [Mix graphs](#) (see page 32) - show pie slices for subgroupings—in either a "sunburst" format or as independent pie slices.
- Trellis - show small multiple graphs for an expanded dimension or key.

### Expand data in Comparative/Multi Comparative graphs

1. Go to a Comparative or Multi Comparative graph. In general, horizontal bars can display more data than vertical bars when data is expanded.
2. In the [Group By menu](#) (see page 25) or toolkit area, turn on auto-expand for the top level (1st By) and additional levels if desired. The icon is blue  when auto-expand is on.

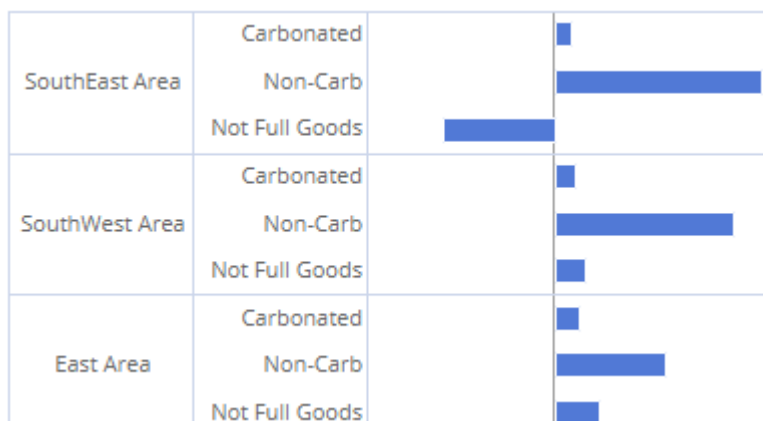
*If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.*



The data layout depends on the underlying [grid type](#) (see page 70), which can be changed in explore mode:

### Comparative/multi comparative graph with "standard" grid type

This graph shows subgroupings within the parent-level.




## Comparative/multi comparative graph with "flat view" grid type

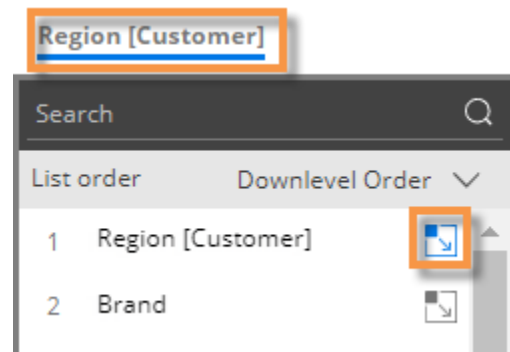
This graph has separate bars at the same level for each unique combination. Bars can be sorted independently of the parent level.



## Expand data in Mix graphs

1. Go to a Mix graph.
2. In the [Group By menu](#) (see page 25) or toolkit area, turn on auto-expand for the top level dimension (1st By) and additional levels if desired. The icon is blue  when auto-expand is on.

*If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.*



The data layout depends on the underlying [grid type](#) (see page 70), which can be changed in explore mode:

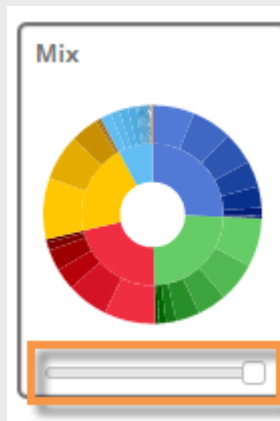


## Mix graph with "standard" grid type (Sunburst)

This graph shows the hierarchy and magnitude of data in a "sunburst" chart. The center ring represents the top-level data (1st By); the data becomes more granular as you move outward. For example, the next ring represents the 2nd By. The slices are sized based on data values and aligned with their parent level to show how much each piece contributed (e.g., brands within each region) .

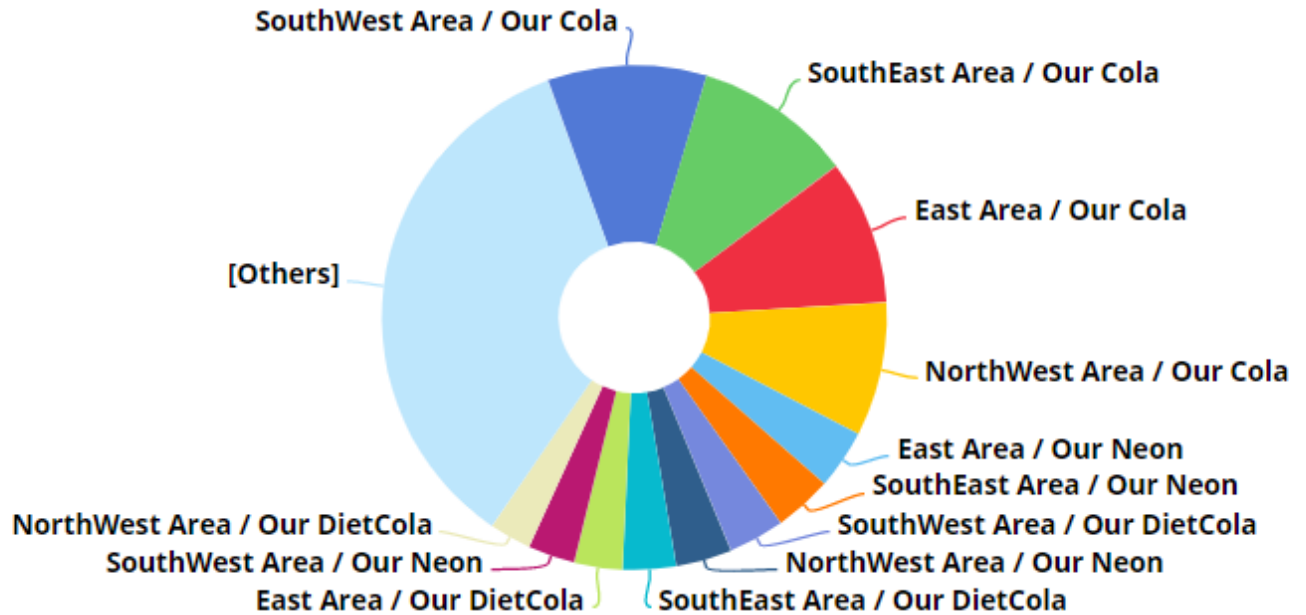


**Tip:** For a sunburst, we recommend setting the **Graph Page Size** to a large number; otherwise, the pie may only show a subset of the data. To set the graph page size, use the slider at the bottom of the graph (i.e., drag the slider all the way to the right).



### Mix graph with "flat view" grid type

This graph has separate pie slices for each combination of members. The pie slices are at the same level to show each unique combination's contribution to the total.



# Check members

In standard 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 individually

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

>	<input type="checkbox"/>	SouthEast Area	73,794
>	<input checked="" type="checkbox"/>	SouthWest Area	60,364
>	<input type="checkbox"/>	NorthWest Area	57,685
>	<input type="checkbox"/>	East Area	57,196


To checkmark a range (i.e., block) of members

1. Click on the top row of the desired range to select it. If you do not select a row, the grid will use the first row by default.
2. Press **Shift** as you click on the bottom row of the desired range.

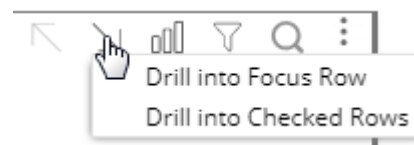
>	<input checked="" type="checkbox"/>	SouthWest Area	989,084	3,857,807
>	<input checked="" type="checkbox"/>	East Area	916,833	3,263,901
>	<input checked="" type="checkbox"/>	NorthWest Area	911,935	3,579,112
>	<input checked="" type="checkbox"/>	Near West Area		207
>	<input type="checkbox"/>	NorthEast Area		679

After checking members:

You can view subtotals by clicking the subtotal button at the bottom of the widget.

	Total (7)	273,537
	Checked (2)	134,158
	Unchecked (5)	139,379
	Total (7)	273,537


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

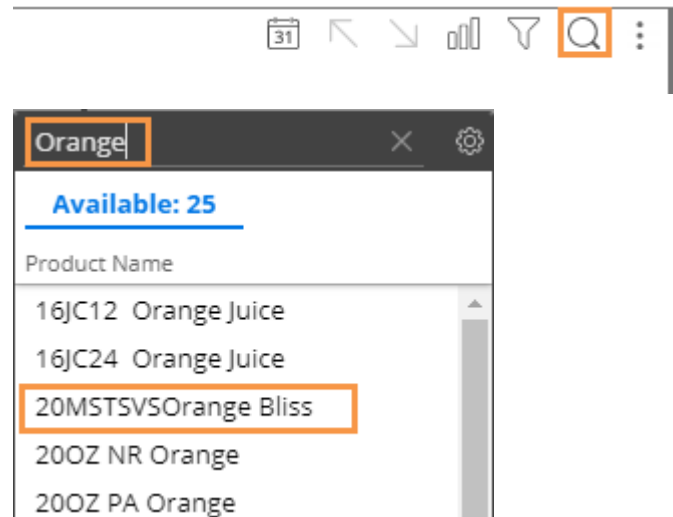


# Search

You can perform a search to find specific items in widgets that list 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.



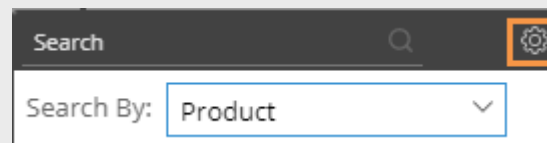
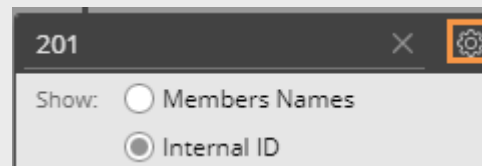
## Tips:

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.

Searching is not available in flat views.



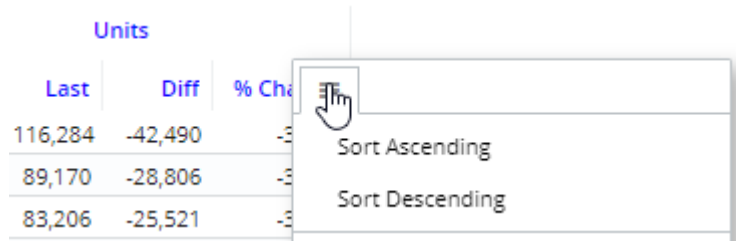
# Sort

You can sort data to rank results. In most widgets, you can sort by values, difference, percent change, names, host codes, etc.

To choose the primary sort

*Option 1:*

1. Place your cursor over the heading or subheading of the column by which you want to sort.
2. Click the menu icon ☰.
3. In the pop-up menu, select a sort option.



Units		
Last	Diff	% Change
116,284	-42,490	-36.13
89,170	-28,806	-32.31
83,206	-25,521	-30.54

*Option 2:*

Click the heading to sort by that column; click again to reverse the sort order.



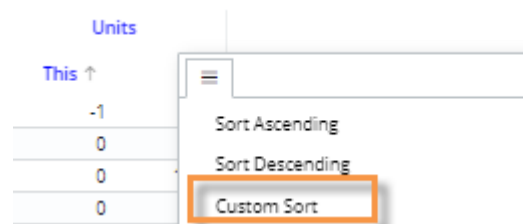
% Change
-63.13
-37.10
-36.54

## Additional sort levels (custom sort)

To control the order of members with matching values (e.g., zeros or matching names) for the primary sort, you can set additional sort levels.



To set more sort levels (custom sort)

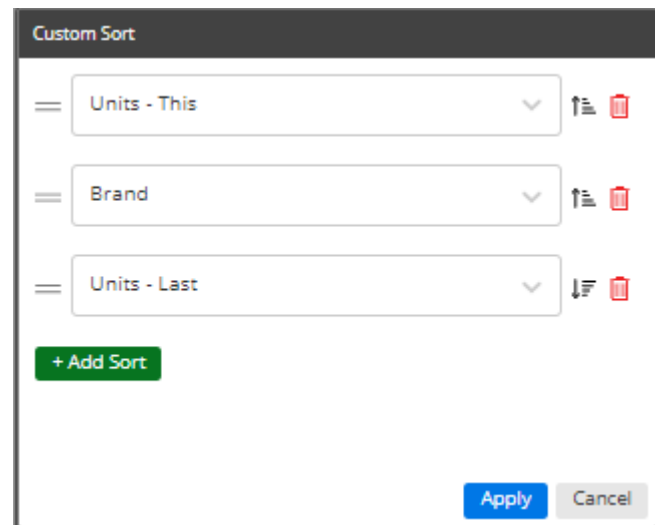
1. Place your cursor over a column heading.
2. Click the menu icon ☰.
3. In the pop-up menu, select **Custom Sort**.





Units	
This ↑	
-1	
0	
0	
0	



To set more sort levels (custom sort)



4. In the Custom Sort dialog, click **+ Add Sort** to add a sort level(s).
5. For each level, select the column by which to sort and choose ascending  or descending . To rearrange levels, click and drag the **=** icon.



**Custom Sort**

= Units - This  

= Brand  

= Units - Last  

**+ Add Sort**

**Apply** **Cancel**

Any rows that have the same values for the primary sort will be ranked according to the secondary sort; any rows with the same primary and secondary sort values will be ranked according to the 3rd sort level; and so on. For example, list products that didn't sell this month (zeros), grouped by brand and then ranked by sales for last month.


2nd		1st	3rd
Brand	Package	This ↑	Last
> Our Cola	8PkCnsPa	0	1,230
> Our Cola	8Pk Cans	0	923
> Our Lemon-Lime	16Oz NR	0	319
> Our Neon	8PkCnsPa	0	443
> Our Neon	8Pk Cans	0	263
> Our New Diet	16PNR8	0	668
> Our New Diet	8PkCnsPa	0	190
> Our New Diet	16PNR8Pa	0	167
> Our New Diet	24Oz NR	0	163

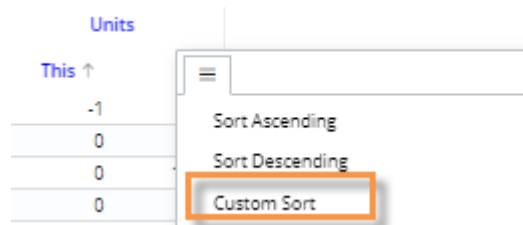
## Crosstab sorting

By default, Crosstab widgets use the same sort method for rows and columns; however, you can choose different sort methods if you wish. For example, you could sort rows (accounts) by name and columns (packages) by sales units. (Note that the sort is based on total values.)

Name	12Pk Cn		2Ltr-8		6Pk Cn		Units (This)
	Units		Units		Units		
	This	Last	This	Last	This	Last	
> <input type="checkbox"/> A Plus Marts	89	144	593	477	69	70	
> <input type="checkbox"/> Acorn Mkts	6	105	0	59	0	0	
> <input type="checkbox"/> All Others	7,845	6,800	8,188	7,493	24,375	18,228	
> <input type="checkbox"/> American Food & Vend	0	0	0	0	845	780	
> <input type="checkbox"/> Arrow Mart	220	115	160	295	20	7	
> <input type="checkbox"/> B. English-North	122	129	192	78	2	78	
> <input type="checkbox"/> B. English-South	0	134	0	0	0	0	



## To sort Crosstab widgets

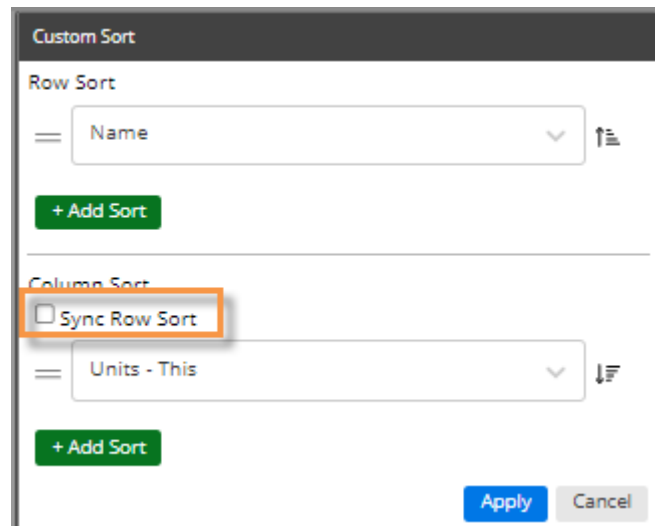
1. Place your cursor over a column heading in a Crosstab grid.
2. Click the menu icon .
3. In the pop-up menu, select Custom Sort.



4. In the Custom Sort dialog, leave **Sync Row Sort** checked to use the same sort method for rows and columns. Then choose sort options.

OR

Clear the **Sync Row Sort** box to use different sort methods. Then, choose how to sort rows and columns. For each sort, you can select the measure, add sort levels (for matching values), and toggle between ascending  and descending .

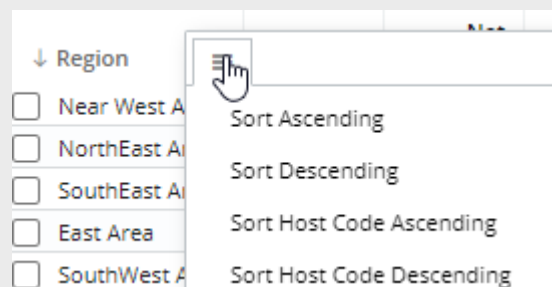


## Tips:

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

When sorting by dimension member, additional options are available in the menu. You can use either sorting method even if host codes are not currently displayed.

- **Sort Ascending/Descending** uses dimension member names.
- **Sort Host Code Ascending/Descending** uses dimension member codes.



# Filter

Filters allow you to narrow down on the exact information needed. You can filter data globally as you use different dashboards, filter across a single dashboard (i.e., workspace filters), filter an individual widget, and apply a filter to a column (in Multi Comparative widgets). Filtering methods include simple menus to select one or more members, saved sets of members (i.e. collections), and dynamic filtering based on tests.

The screenshot shows a dashboard with a 'Status' filter set to 'All'. Below it, a 'Multi Comparative' widget displays a table of sales data for 'Our Cola' in the 'SouthEast Area'. The table has columns for 'SalesRep', 'Units', and 'Month To Date vs. YAG'. A blue callout box labeled 'Column filters (in Multi Comparative)' points to the 'Units' column. To the right, a 'Global filter' callout points to the 'Status' filter. Below the table, a 'Trend' widget shows a bar chart for 'Visclosky, George'. A blue callout box labeled 'Individual widget filters' points to the chart. On the right side, a 'Workspace filters' callout points to a sidebar containing filters for 'Status (Customer)', 'Brand (Product)', and 'Region (Customer)'.

SalesRep	This	Last	This	Last	This	Last
Visclosky, George	8,505	13,505	1,960	7,146		
Saxton, Tom	6,944	9,944	853	5,814		
Office-Lasoski	4,397	7,397	229	6,758		
English, John	4,348	6,348	913	3,380		
Baird, Jim	4,224	7,556	1,580	2,998	2,476	4,966
TS-Lasoski	1,869	2,416	0	0	875	1,104
Andrews, Greg	547	670	0	0	108	138
Special Event	12	18	0	0	0	0
Total (9)	30,856	47,652	8,276	15,022	17,418	29,310

## 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.

The screenshot shows a 'Comparative' widget with a breadcrumb path at the top: 'NY | BEST BEER FAMILY | 30 PACK CANS | BEST BEER LT | BRET BURTON > SUPERMARKET > Customer Name'. Below the breadcrumb path, there are four blue callout boxes: 'Workspace filters (including global filters and filter widgets)' points to the 'NY' filter; 'Individual widget filters' points to the '30 PACK CANS' filter; 'Downlevel filters' points to the 'BRET BURTON > SUPERMARKET' filter; and 'Group By (in widgets that compare members)' points to the 'Customer Name' filter.

Customer Name	This	Last
1385	286	520
234	26	



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

Collections are saved sets of members. Collections can be applied to a single widget or the workspace (i.e., all widgets) to filter the data. If the collection is applied to a single widget, it is considered to be a "widget filter"; if the collection is applied to the workspace (i.e., workspace filter), it filters across the dashboard.

Dynamic filters are based on test criteria (e.g., volume greater than zero) rather than a static set of members. When a dynamic filter is applied to a widget, the Salient Dashboards application runs a test and filters out data for members that do not meet criteria. This type of collection is only available for key members (e.g., customers). Dynamic filters may be saved as dynamic collections so they can be reused and shared.


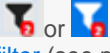
## Workspace filters

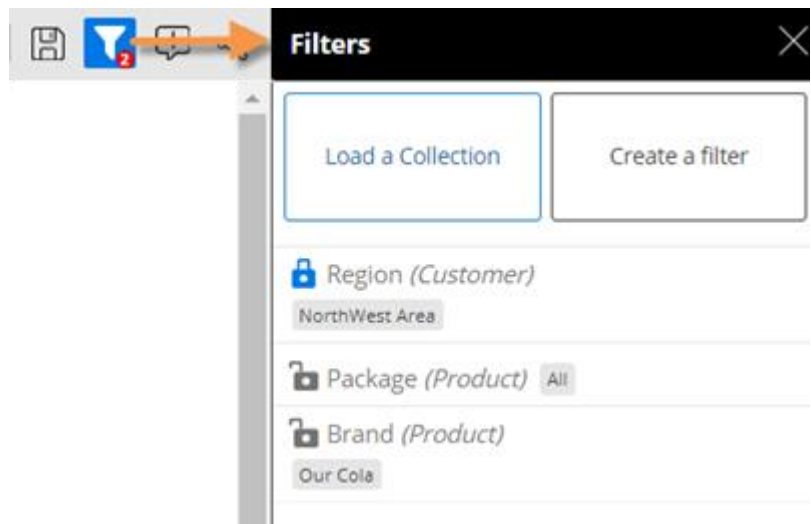
A workspace filter affects widgets across the dashboard. A filter panel provides streamlined access to these filters.

To use workspace filters

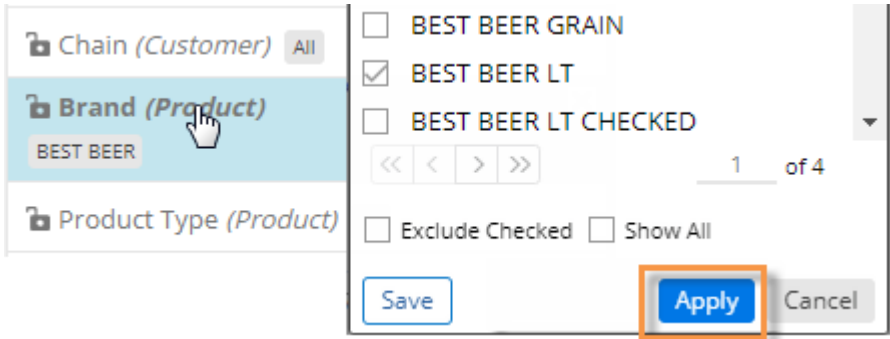



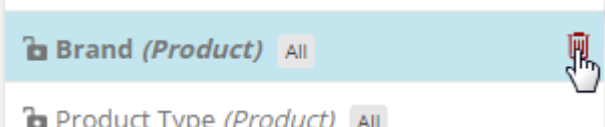
Click  at the top of the screen to open the filter panel (*keyboard shortcut: f*). This button is blue when the filter panel is open.

### Tips:


- The red number  indicates how many workspace filters are currently on (does not include filters set to "All").
- A contrasting symbol  means that at least one [global filter](#) (see page 44) is turned on.

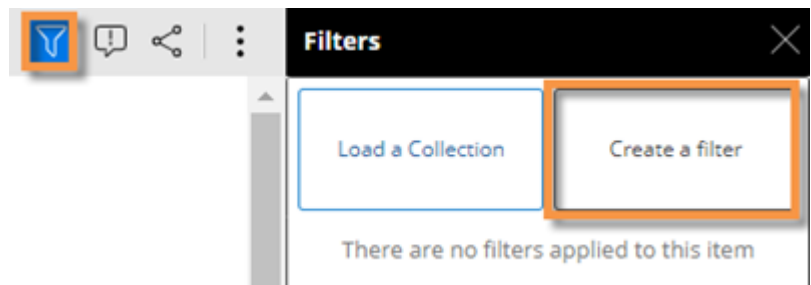


In the filter panel, choose from existing workspace filters or [create a new workspace filter](#) (see page 42).

Option	Instructions
Make a filter selection (e.g., select a different member)	<p>Click on the workspace filter and make your selections in the pop-up window. Click <b>Apply</b>.</p>  <p><b>Tips:</b></p> <ul style="list-style-type: none"> <li>• By default, the window only shows members with data in the current context. You can click <b>Show All</b> in the dialog to list all members.</li> <li>• You can <a href="#">import a file</a> (see page 58) to quickly filter on a list of members. Click  at the top of the pop-up window to access this option.</li> </ul>
Reset a filter	<p>Place the cursor over the filter and click the <b>X</b> button. The filter will still be present but will show data for all members.</p> 
Remove a filter	<p>Reset the filter as explained above. Then, place the cursor over the filter and click the  button.</p> 

### To create a workspace filter

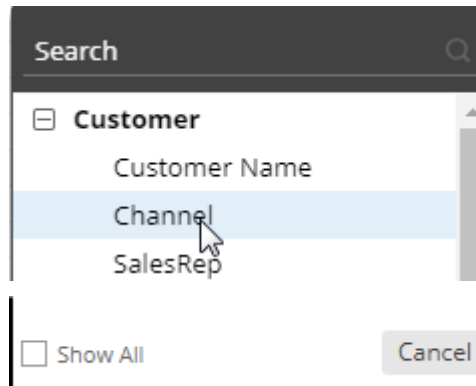
1. Click the  at the top of the dashboard screen to open the filter panel.
2. Click **Create a filter**. This option allows you to select members from a menu. If you prefer, you can filter on a [collection of members](#) (see page 46).



## To create a workspace filter


3. Select the dimension for which to create a filter.

*If you do not see the dimension listed (in view mode):* Check the **Show All** box to access dimensions besides those that were built into the dashboard.

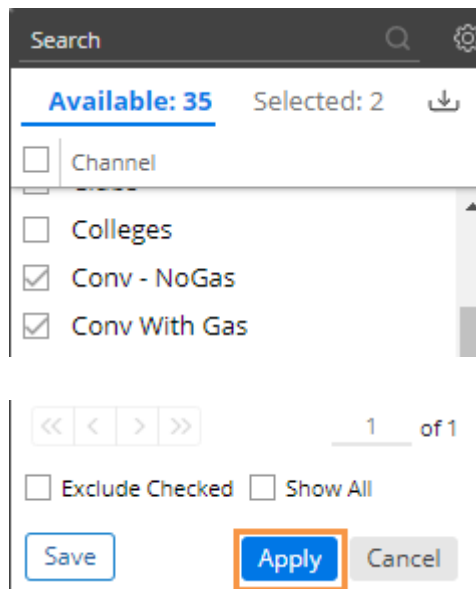


4. Checkmark the member(s) to filter on.

### Tips:

- The **Exclude Checked** option lets you show data for all members except the selected members.
- You can [import a file](#) (see page 58) to quickly select members. Click  at the top of the selection window to access this option.
- You 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.

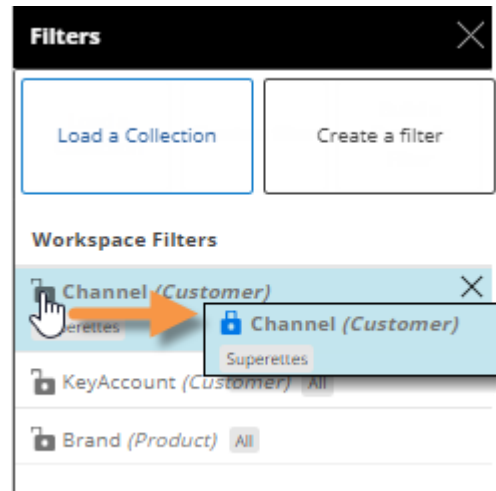
To turn on a global filter

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

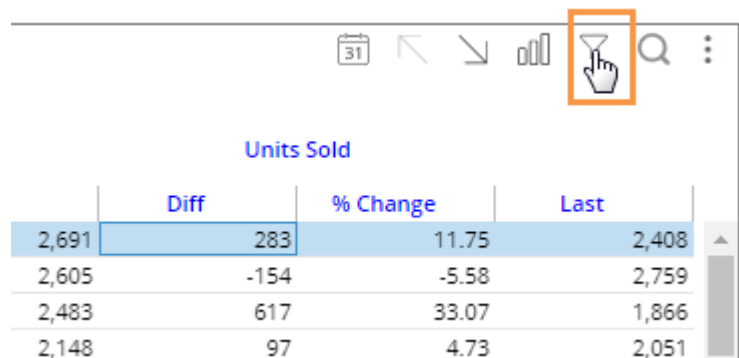


# Individual widget filters

Individual widget filters let you filter data in a specific widget without affecting the entire dashboard.

To create a widget filter

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



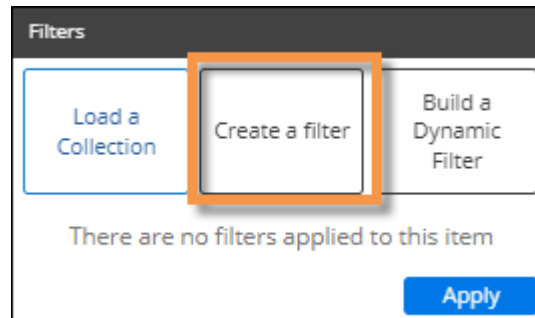
	Diff	% Change	Last
2,691	283	11.75	2,408
2,605	-154	-5.58	2,759
2,483	617	33.07	1,866
2,148	97	4.73	2,051

To create a widget filter

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

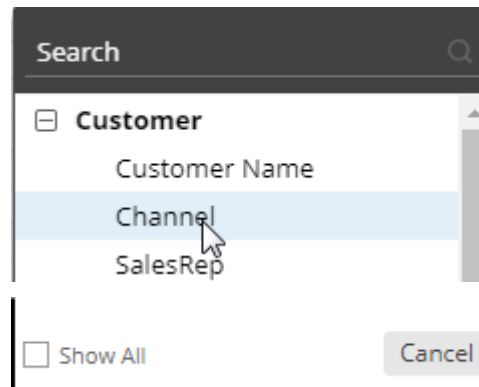
Other options may be available:

- **Checked** - If the widget has checked members, you can filter on them.
- **Load a Collection** - You can filter on a saved [collection of members](#) (see page 46).
- **Build a Dynamic Filter** - You can [filter based on test criteria](#) (see page 48).




3. Select the dimension (i.e., attribute) for which to create a filter.

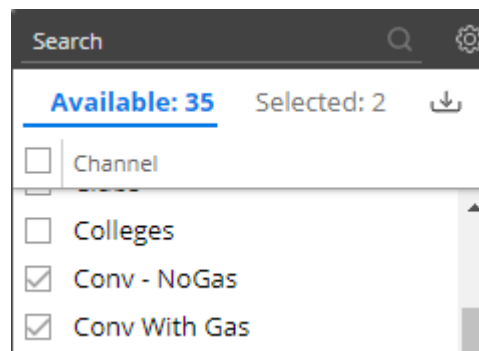
*If you do not see the dimension listed (in view mode):* Check the **Show All** box to access dimensions besides those that were built into the widget.



4. Checkmark the desired member(s).

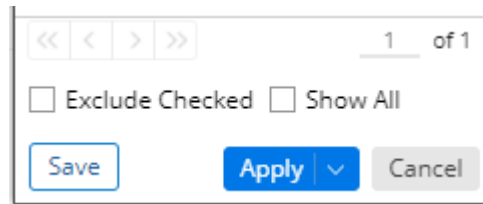
#### Tips:

- 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 except the selected members.
- You can [import a file](#) (see page 58) to quickly select members. Click  at the top of the selection window to access this option.
- You can optionally click **Save** to create a collection of the checked members so that they can be reused later.

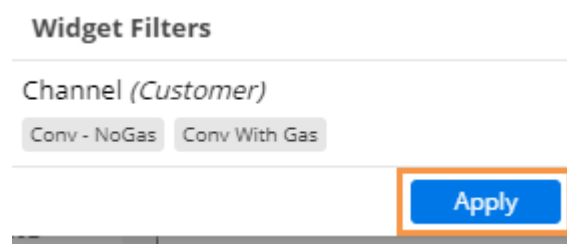


To create a widget filter

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





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

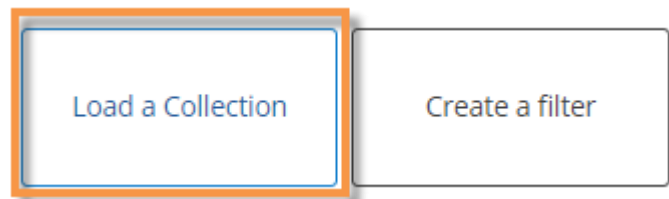


## Filter data by a collection

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.




To apply a collection as a filter

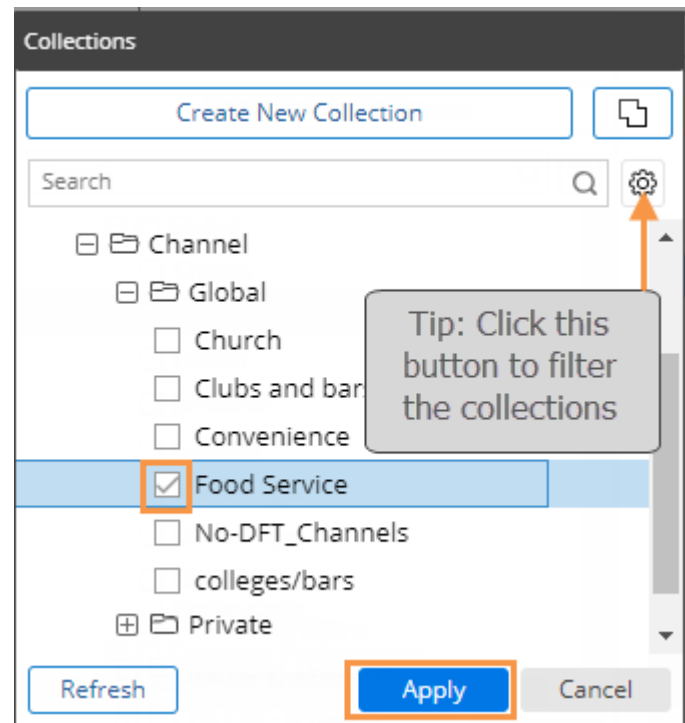
1. Do one of the following to open the filters area:
  - *To apply a collection to a single widget:* Click the filter  button at the top of the widget (visible on mouseover).
  - *To apply a collection to the entire dashboard:* Click the filters  button at the top of the screen to open the Filters panel. (Collections cannot be applied to the workspace in explore mode.)
  - *To apply a collection to an individual column (in Multi Comparative only):* Click the column header, and select Filter Date Range.
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.
4. Click **Apply**.

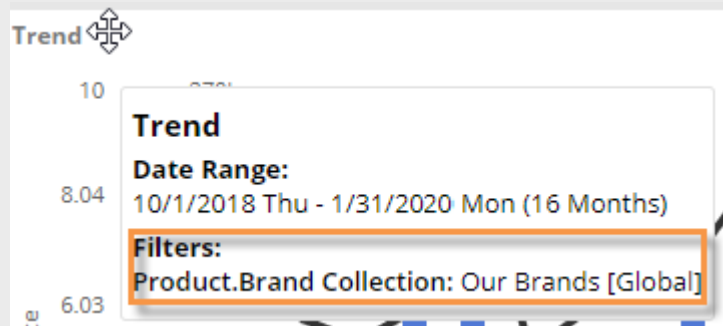
**Tips:**

- 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.
- The  symbol represents a [dynamic collection](#) (see page 48). This type of collection updates dynamically based on test criteria.
- The  symbol represents a dynamic collection that has been created in SIM. You can apply this type of collection but not edit it in Salient Dashboards.
- The  button lets you merge multiple collections into a single new collection.



**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 even if they are hidden in view mode.




# Dynamic filters

Dynamic filters are based on test criteria (e.g., volume greater than zero). When a dynamic filter is on, the widget only includes data for the members that meet the test criteria. The filter updates automatically based on the data context rather than storing a static list of members. Dynamic filters may be saved as dynamic collections so they can be reused and shared.

## To apply a dynamic filter

1. Go to the filters area for the widget or column:

*To apply a dynamic filter to a widget* - Select the widget and click the filter  button in its upper-right corner (visible on mouseover).

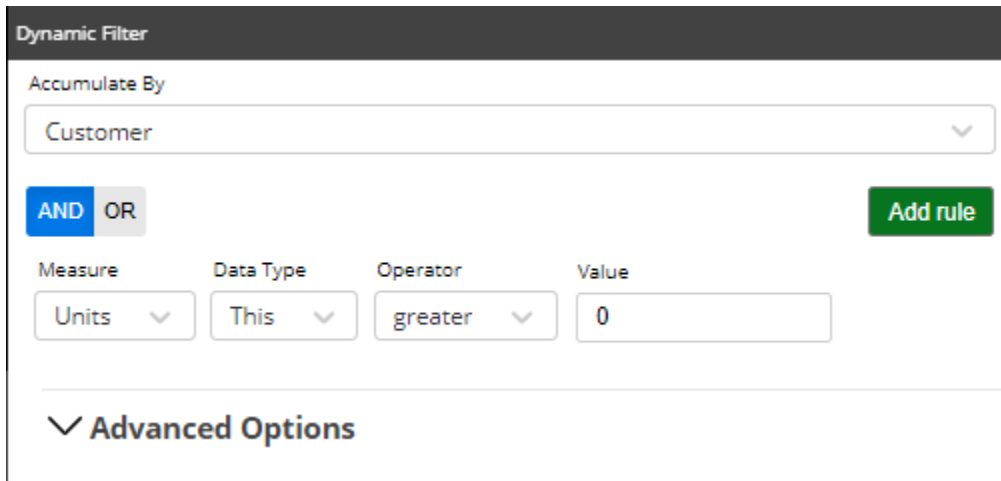
*To apply a dynamic filter to an individual column (in Multi Comparative only)* - Click the column heading and select **Filter Date Range**.

2. Click **Build a Dynamic Filter**.



3. In the **Dynamic Filter** area, choose the key to test from the Accumulate By menu (e.g., filter out customers that do not pass the test).
4. Set up one or more rules:
  - Select the measure to test.
  - Select the date range (This or Last) or the variance (Diff or % Change) you wish to test. By default, the date ranges correspond to the widget date ranges. For example, if the widget compares the month-to-date with the prior month, then a rule for "This" would look at the month-to-date and a rule for "Last" would look at the prior month. If the widget does not have a Last date range, then a rule for "Last" will default to one year earlier (YAG) than the "This" date range. If you prefer, you can test a different date range (i.e., something other than the widget date range) by changing the Advanced settings as explained below.
  - Select an operator (e.g., greater than).
  - Enter a value to compare against.
  - To use multiple rules, click Add Rule, repeat the above steps, and choose **AND** or **OR** to control which rules must be met.

**Tip:** If the desired key or measure is not available, you may need to change the cube under Advanced Options.



**Dynamic Filter**

Accumulate By  
Customer

AND OR Add rule

Measure	Data Type	Operator	Value
Units	This	greater	0

Advanced Options



5. Optionally, expand the Advanced Options area and choose settings to refine the test.

Advanced option	Explanation
Cubes	To test based on data from a different cube, select from the Cubes menu. This controls which keys and measures are available for selection.
Equivalent	To test data after it has been converted to equivalent units (if applicable), select from the Equivalent menu. An equivalent table selected here overrides an equivalent table applied to the widget.
Passed In	<p>Choose the part of the date range to consider for the test. These options affect the outcome when the date range includes multiple units of time (e.g., 12 weeks).</p> <ul style="list-style-type: none"> <li>• All Periods (In Total) - looks at the entire date range (e.g., total of all 12 weeks).</li> <li>• First and Last Period - looks at the first and last units of time (e.g., 1st week and 12th week); both units of time are needed to pass the test.</li> <li>• First Time Period - only considers first unit of time (e.g., 1st week).</li> <li>• Last Time Period - only considers last unit of time (e.g., 12th week).</li> <li>• Any Period (Individually) - considers all units of time individually with only one unit of time needed to pass the test (any week).</li> <li>• All Periods (Individually) - considers all units of time individually with all units of time needed to pass the test (e.g., every week).</li> </ul>
Date Range	<p>Choose the date range to test.</p> <ul style="list-style-type: none"> <li>• Dynamic Date Range (default) - When this option is on, the test will use the date range of the widget. For example, if the widget shows the month-to-date, the test will look at that month to determine which members pass. If the month updates over time (e.g., November to December) <u>or</u> the widget timeframe changes (e.g., one month to 6 months), then the test will automatically update to look at the new dates.</li> <li>• Specific Date Range - You can choose this option to test data for a specific date range, which can be different than the widget's date range. For example, you might want to find new products based on three months of data but look at data for a longer timeframe in the widget. After choosing this option, the date setup dialog will appear. You can then select the date range(s) for the test. Any "This" rules in the test will look at the "This" date range you select here; any "Last" rules will look at the "Last" date range. The date range(s) can be fixed or update over time based on the current date (e.g. month-to-date). However, the resolution and number of dates used in the test will not change.</li> </ul>
Filters	To filter the data prior to testing it, click the arrow beside the Filters menu. This option will filter the data used in the test but will not directly filter the data shown in the widget. See the following new product example. You can load a collection of saved members or create your own filter by selecting members. As in other areas of dashboards, you can combine multiple filters.

6. Do one of the following:

- To immediately apply the filter without saving it, click **Apply**.
- To save the filter as a dynamic collection, click **Save**. Note that this will save the test criteria rather than a list of members.

## Example - New product filter

You could use a dynamic filter to find and analyze products that were recently introduced. In this example, a product would be included if it had volume of greater than zero during This date range (based on the widget's This timeframe) and volume of zero or less during Last date range (based on the widget's Last timeframe).

**Dynamic Filter**

Accumulate By  
Product

**AND** **OR** Add rule

Measure	Data Type	Operator	Value	
Units	This	>	0	
Units	Last	<=	0	

**Advanced Options**

Now suppose you are interested in products that are new to a particular channel. You could use a filter in the advanced area of the test to find those products.

**Advanced Options**

Cubes: Sales      Equivalent: None

Passed In: All Periods (In Total)      Date Range: Dynamic Date Range

Filters: Convenience

When this setting is on, the test runs the test on the filtered data (e.g., sales for convenience stores only) but does not directly filter the data in the widget. In this example, the widget includes data for other channels, but the results are filtered on products that are new to the convenience channel.

↑ Channel	Units	
	This	Last
> <input type="checkbox"/> 3rd Party Operators	86	27
> <input type="checkbox"/> All Othr On Premise	301	47
> <input type="checkbox"/> Bars / Taverns	44	0
> <input type="checkbox"/> Beverage Centers	459	127
> <input type="checkbox"/> Churches	38	2
> <input type="checkbox"/> Clubs	24	4
> <input type="checkbox"/> Colleges	312	72
> <input type="checkbox"/> Conv - NoGas	216	0
> <input type="checkbox"/> Conv With Gas	1,861	0
> <input type="checkbox"/> Dairy Stores	69	2
<b>Total (32)</b>	<b>12,538</b>	<b>1,743</b>

## Example - Active customer filter

You could use a dynamic test to filter on active customers. In this example, a customer would be included if it had volume of greater than zero during This date range (based on the widget's This timeframe).

**Dynamic Filter**

Accumulate By  
Customer

AND OR Add rule

Measure	Data Type	Operator	Value
Units	This	>	0

**Advanced Options**

Cubes  
Sales

Equivalent  
None

Passed In  
All Periods (In Total)

Date Range  
Dynamic Date Range

Filters  
x | v

If your definition of an active customer is based on a more precise timeframe (e.g., sales during last 12 months), you could assign a specific date range that is not based on the widget date range. This would allow you to change the date range of the widget without affecting the test.

**Advanced Options**

Cubes  
Sales

Equivalent  
None

Passed In  
All Periods (In Total)

Date Range  
Specific Date Range

Filters  
There are no filters

**Name: Last 12 Months [1 Month Lag] vs. YAG** Day Filters

Resolution: Month Week Ending: Sunday


This




Month To Date Last Month Last 6 Months Year To Date Last Year Custom Fixed

Start: 01/1999 End: 12/1999

< | 12 >


# Column filters (in Multi Comparative)

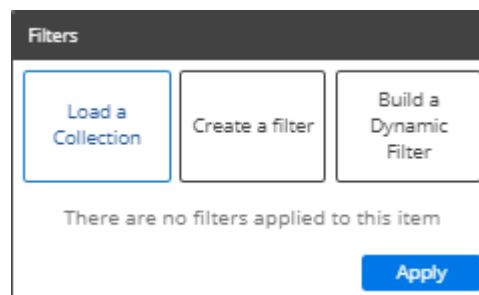
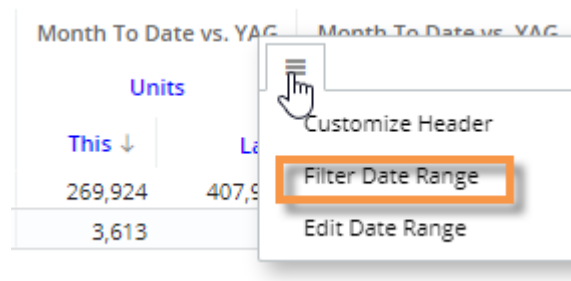
The columns in a Multi Comparative widget can be filtered on various subsets of data. The filters, date ranges, measures, and equivalents can be the same or different across columns. Any number of columns can be included to provide a customized view of performance. For example, compare performance across individual brands, packages, and custom groups of products in one view. A filter icon  indicates that a column is filtered. The filtered data is also available when you switch to graph format.

Channel	All Products		Our Cola			12 Pack Cans		Our Carbonated Brands		Products with Net Price > \$10	
	Units		Units			Units		Units		Units	
	This ↓	% Change	This	Last	% Change	This	% Change	This	% Change	This	% Change
> <input type="checkbox"/> Regional Chains	87,307	18.54	35,909	29,847	20.31 	38,902	2.26	80,345	20.11 	5,365	-18.64
> <input type="checkbox"/> Conv With Gas	29,431	10.01	12,751	11,590	10.02	5,568	14.54	26,121	10.67	12,266	-6.59
> <input type="checkbox"/> Mass Merchandisers	23,893	-27.25 	10,975	15,990	-31.36 	15,290	-40.53 	23,059	-27.99 	1,798	2.98
> <input type="checkbox"/> Other Groceries	20,611	4.06	8,880	7,889	12.56	3,185	88.46 	17,308	8.88	7,557	-12.16
> <input type="checkbox"/> 3rd Party Operators	14,376	-8.29	5,523	5,951	-7.19	201	55.81 	12,165	-9.69	5,953	-16.47
> <input type="checkbox"/> Drug Stores	14,296	10.74	5,965	5,797	2.90	7,311	3.32	13,532	9.89	1,223	8.71
> <input type="checkbox"/> Local Chains	11,851	5.16	5,377	5,191	3.58	4,195	6.91	10,979	5.96	1,118	-18.45
> <input type="checkbox"/> Industrial	9,576	8.47	2,151	2,159	-0.37	1	-80.00 	5,241	4.78	2,215	6.70
> <input type="checkbox"/> Superettes	9,020	-7.84	3,681	4,215	-12.67	2,349	-25.31 	7,875	-10.14	1,551	-22.84 

The following instructions explain how to filter individual columns. Column filters can also be set up to work with dashboard filters to compare whatever is selected to [benchmarks](#) (see page 54) such as "all others" or custom cohorts.


To apply a filter to a column

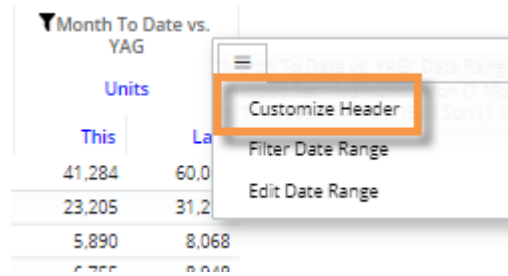
1. Add or select a Multi Comparative widget. Column filtering is only available in this widget type.
  - The widget must have at least one measure.
  - The widget must be in grid format.
2. Place the cursor over the main heading of the column to filter and click the  menu icon.
3. Select **Filter Date Range**.
4. In the next menus, choose how to filter the column. These options are the same as those available for other types of filters. For example, you can [filter on a saved collection](#) (see page 46), [create a new filter for any available dimension](#) (see page 44), [apply a dynamic filter](#) (see page 48), etc.



## To apply a filter to a column

5. *(Recommended)* Customize the column header to indicate what the column is filtered on:

- Place the cursor over the column and click the  menu icon.
- Select **Customize Header**.
- Choose header options.



### Tips:

- Column filters also allow you to apply equivalents to individual columns to compare converted data within a widget. Equivalents are available via the **Create a filter** option.
- Depending on the dataset configuration, you may be able to include custom calculations that compare one column to another (e.g., difference between one brand and all products). This feature requires temporal measures.

# Benchmarking

Benchmarking allows you to compare the performance of any part of your organization to other parts that represent standards and industry bests. In Salient Dashboards, you can dynamically benchmark performance against "all others" or custom peer groups (i.e., cohorts) using advanced options in Multi Comparative column filters. For example, compare a single account to all others and/or a top-performing group of similar accounts. The results update dynamically based on whatever filter is selected at the time; just pick from the filter to benchmark a different part of the organization (e.g., a different account).

Multi Comparative

R D Foods | Form

Last Month vs. YAG

R D Foods

Units

Form	This ↓	Diff	% Change	Mix (This)
> <input type="checkbox"/> PET	3,188	-785	-19.76	87.1
> <input type="checkbox"/> Glass	164	92	127.78	4.5
> <input type="checkbox"/> Fountain Tank	161	-14	-8.00	4.4
> <input type="checkbox"/> Cans	148	150	7,500.00	4.0
> <input type="checkbox"/> Cups & Lids	0	0	0.00	0.0
> <input type="checkbox"/> Fountain BIB	0	0	0.00	0.0

Last Month vs. YAG | Benchmark Group:  
Target Conv with Gas Acct

Units

This	Diff	% Change	Mix (This)
4,440	739	19.97	59.9
226	55	32.16	3.0
10	15	300.00	0.1
2,659	-1,314	-33.07	35.9
48	48	100.00	0.6
28	19	211.11	0.4

KeyAccount (Customer)

R D Foods

The filtered data is also available when you switch to graph format.

To compare performance to a benchmark

1. Add or select a Multi Comparative widget. Column filtering is only available in this widget type.
  - The widget must have at least one measure.
  - The widget must be in grid format.
  - The widget should have at least two date columns, which should typically use the same date (e.g. MTD vs. YAG) as each other to provide a direct comparison.
2. Apply a workspace filter to focus on the member (e.g., account) that you want to compare to a benchmark. The workspace filter may be applied via a filter widget, filter panel, or other method. To preview results as you work, select a member from the filter (e.g., a single account). A different member may be selected at any time; the columns will update dynamically.


\*

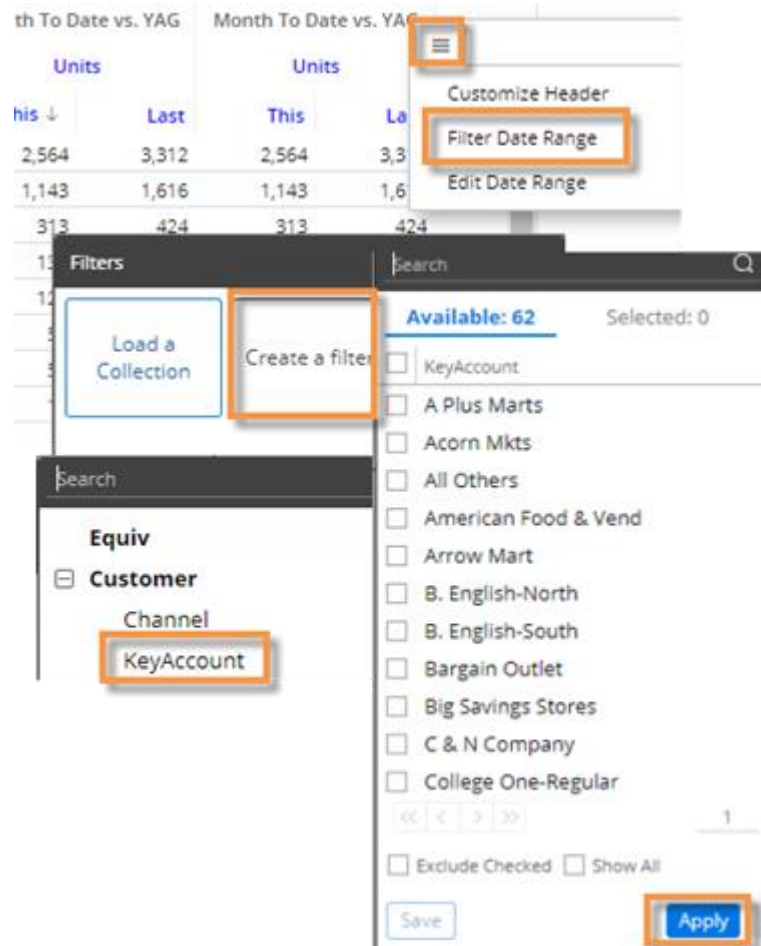
<

3. Leave at least one column as is to show results for whatever is selected in the filter.

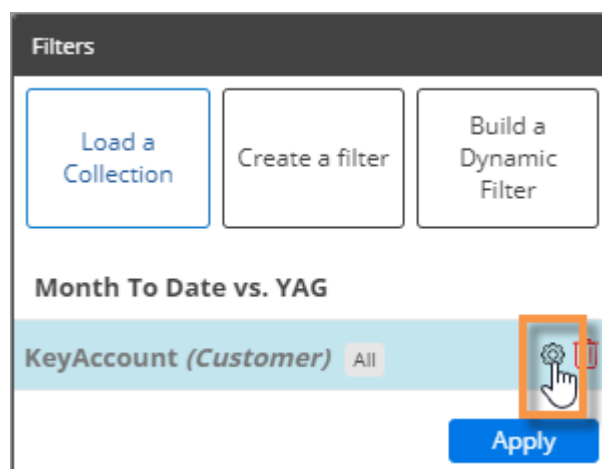
To compare performance to a benchmark

4. In another column, apply a filter for the same dimension or key as the workspace filter (e.g., key account)—leaving it set to All.

- Place the cursor over the column and click the  menu icon.
- Select **Filter Date Range**.
- Click **Create a filter**.
- Select the dimension or key list.
- Do not check any members. Click **Apply** once.



5. In the Filters area, place the cursor over the new filter and click the  button to access advanced settings.

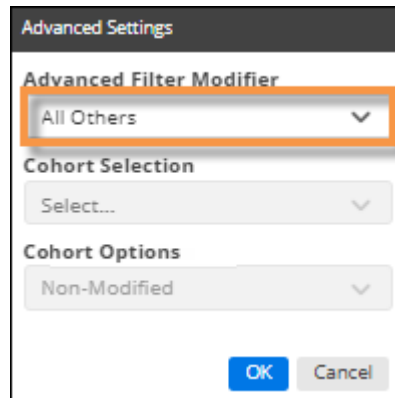


To compare performance to a benchmark

6. Select one of the following from the Advanced Filter Modifier menu:

#### Option 1: Compare to All Others

To show data for all members except the member you are filtered on (e.g., all key accounts except R D Foods), select **All Others** and click OK.



#### Option 2: Compare to a Cohort

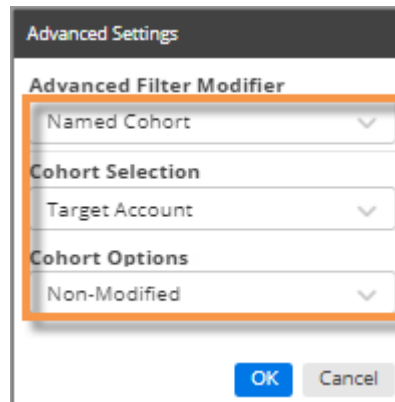
To show data for a custom group of members (must be pre-defined by an administrator), make the following selections and click OK.

Select **Named Cohort**.

From the Cohort Selection menu, select the name of the cohort group. The Salient Dashboards application will search within this group to find the corresponding cohort for the filter member (e.g., target account for R D Foods) and show results for the cohort member(s).

From the Cohort Options menu, choose from the following options to add or remove the filter member from the results:


- **Non-Modified** - Leave the cohort as is; do not add or remove the filter member.
- **Include Filtered Members** - If the cohort does not include the filter member, add it to the results.
- **Exclude Filtered Members** - If the cohort includes the filter member, remove it from the results.

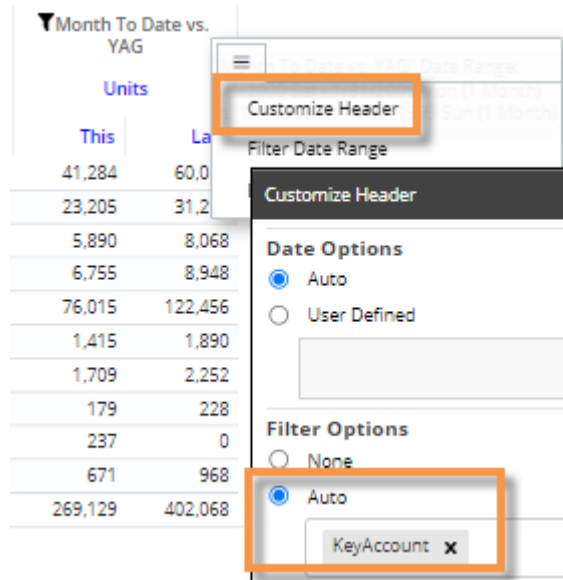


7. After choosing Advanced Settings, click **Apply** to apply the filter to the column.



To compare performance to a benchmark

8. *(Recommended)* Repeat the following steps for each column to modify headings so that they show what the column is filtered on:
  - Place the cursor over the column and click the  menu icon.
  - Select **Customize Header**.
  - In the **Filter Options** section, select **Auto** and then select the filter dimension to automatically show the member(s) that the column is filtered on; then click OK. Other options for custom headers are available.



#### Tips:

For a cohort comparison:

- If the filter member does not have a cohort within the selected group, the column will show zero data and the column header will show "Group Not Found" (if filter label is on).
- You cannot compare a cohort to multiple members at once (i.e., filter on multiple members); the column will show zeros if multiple members are on.

Depending on the dataset configuration, you may be able to include custom calculations that compare one column to another (e.g., difference between an account and a target account). This feature requires temporal measures.

See the *Salient Dashboards Installation and Configuration Manual* for information about creating and editing cohorts.


To provide automatic comparisons of user-assigned data to benchmarks (e.g., how am I doing compared to everyone else), your organization can use password collections to filter the data in a column and include another column with "all others" or cohorts applied. This feature requires additional setup.

# Import filters

You can import a text file (i.e., local collection) to quickly select members for a filter as explained below. This method works 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. This feature may be turned off globally by your administrator.

In addition to the method explained below, you can [import options, including filters, from other dashboards](#) (see page 79). However, this option is not available for filter widgets.

To import a text file for a filter

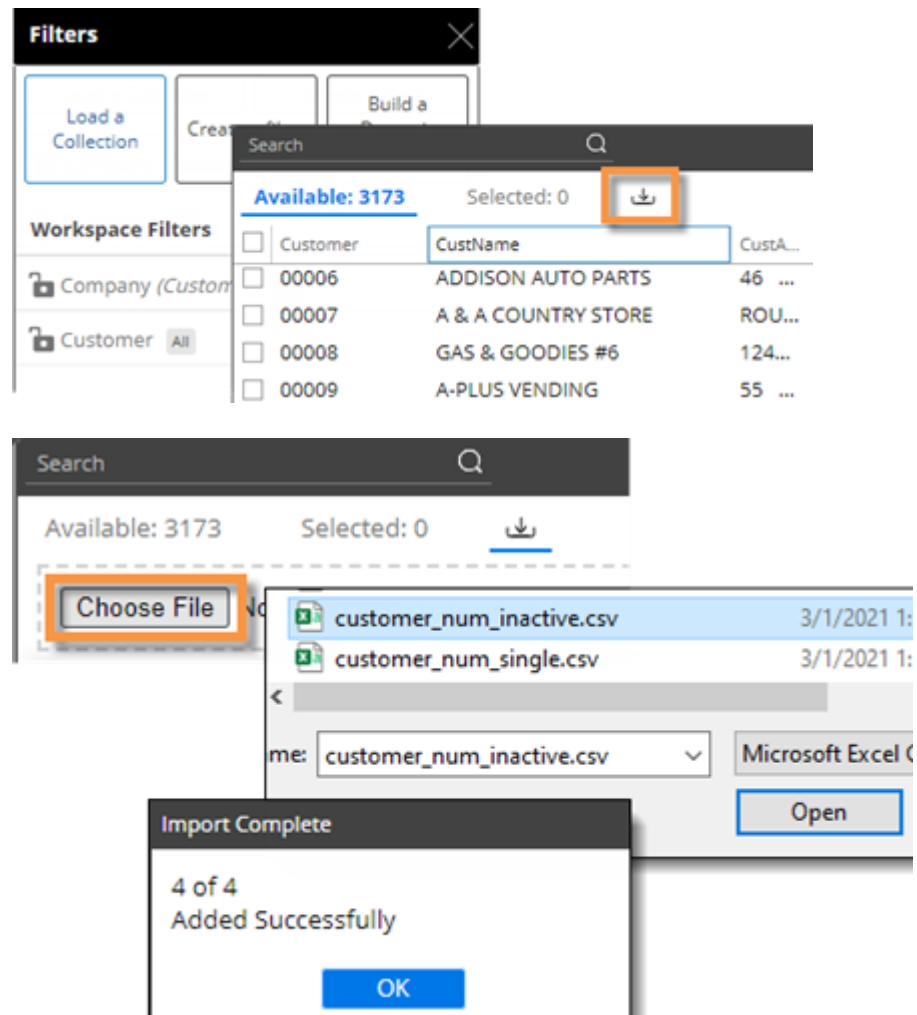
1. If you haven't already, create a text file that lists the members. It should have the CSV extension. Each line should list the host code of a single member.
2. Go to the selection window for the filter. For example, to import a text file for a workspace filter, click on the workspace filter in the filters panel.
3. Click the  button at the top of the window.

Example CSV file

```
91857
11904
11880
00000
```

4. Choose the file and click Open.

Salient Dashboards will show a summary of the members imported.



To import a text file for a filter

- 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.

Channel	This ↓	Last
> <input type="checkbox"/> Regional Chains	87,307	73,745
> <input type="checkbox"/> Conv With Gas	29,431	30,153
> <input type="checkbox"/> Mass Merchandisers	23,893	18,932
> <input type="checkbox"/> Other Groceries	20,611	21,147
> <input type="checkbox"/> 3rd Party		
> <input type="checkbox"/> Drug Stores	14,290	16,732

**Double-click to drill**

To drill down on multiple members


- Check the desired [members](#) (see page 35) in a grid.
- Click  on the title bar at the top of the widget.
- If a drop-down appears, select **Drill into Checked Rows**.

Comparative		
Channel		
Channel	This ↓	% Change
> <input checked="" type="checkbox"/> Regional Chains	87,307	18.39
> <input type="checkbox"/> Conv With Gas	29,431	-2.39
> <input checked="" type="checkbox"/> Mass Merchandisers	23,893	26.20
> <input type="checkbox"/> Other Groceries	20,611	-2.53
> <input type="checkbox"/> 3rd Party Operators	14,376	23.33

Downlevel to SalesRep

### 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 25) as you drill to follow a flexible drill path.

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

**Tips:**

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.

▼ <input type="checkbox"/> Regional Chains	87,307
> Johnson, Louise	13,811
▼ Baird, Jim	10,353
> Village North	4,651
> S.Newb...	...

**Double-click**

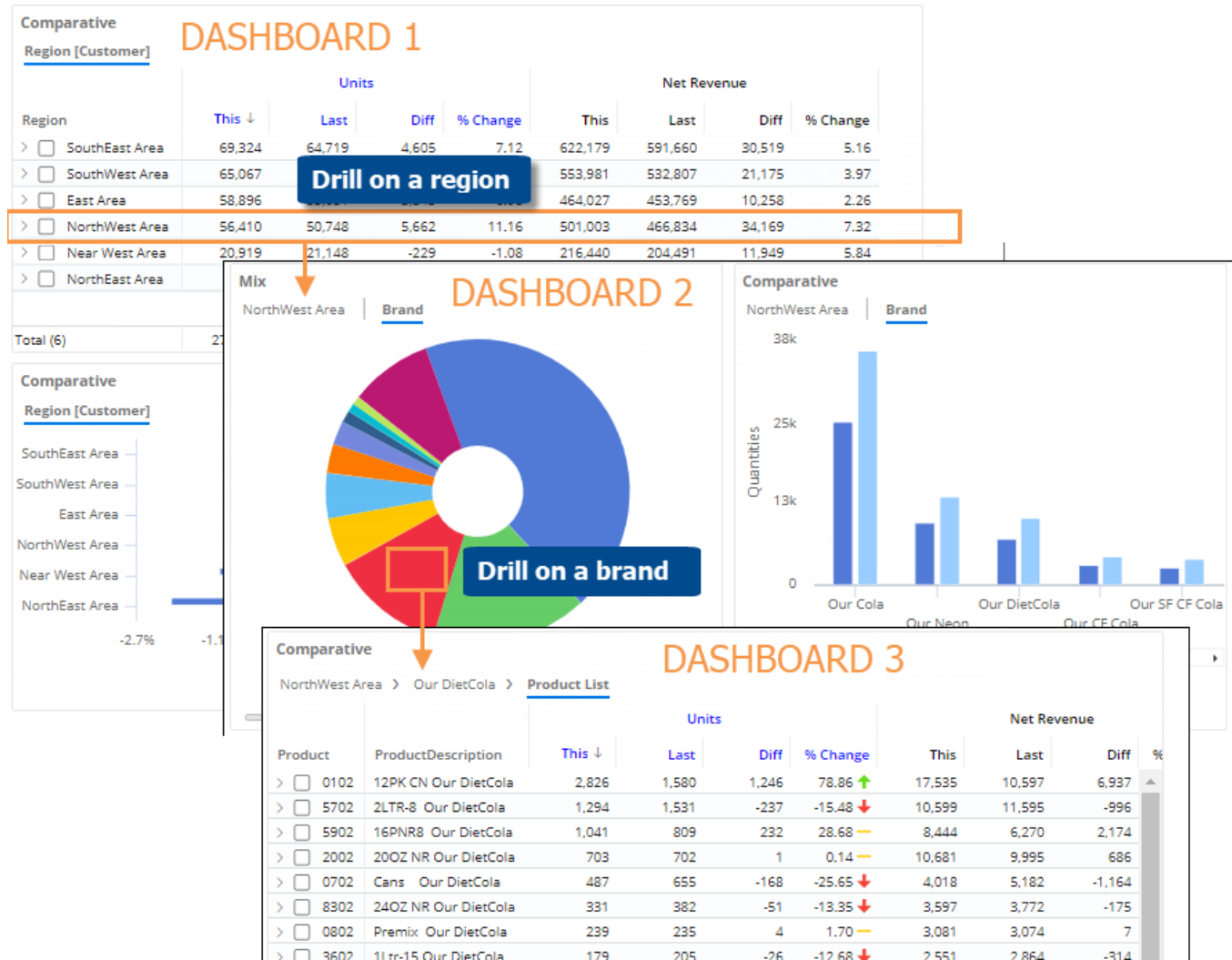
If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

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 62). 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.

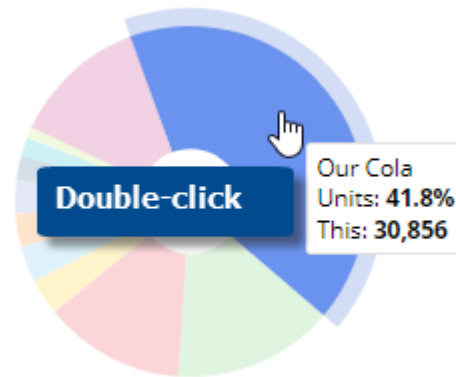


## Use custom drill-downs

1. [Open the first dashboard](#) (see page 8) in the custom drill-down.
2. Select the item(s) and drill by [double-clicking or using other drill methods](#) (see page 59).


		Units		
Region		This ↓	Last	Diff
> <input type="checkbox"/> SouthEast Area		69,324	64,719	4,605
> <input type="checkbox"/> SouthWest Area		65,067	60,886	4,181
> <input type="checkbox"/> East Area			55,051	3,845
> <input type="checkbox"/> NorthWest Area			50,748	5,662
> <input type="checkbox"/> Near West Area		20,919	21,148	-229

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

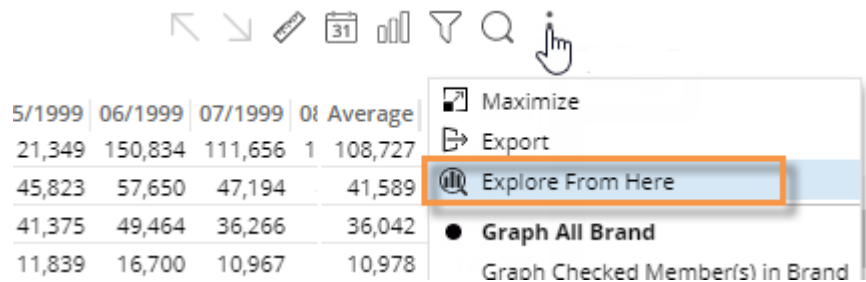
Explore mode provides additional capabilities for data investigation beyond those available in view mode. Users can change the analysis type, choose settings, and more. Explore mode does not provide the same dashboard building capabilities as edit mode.

To start exploring from a widget

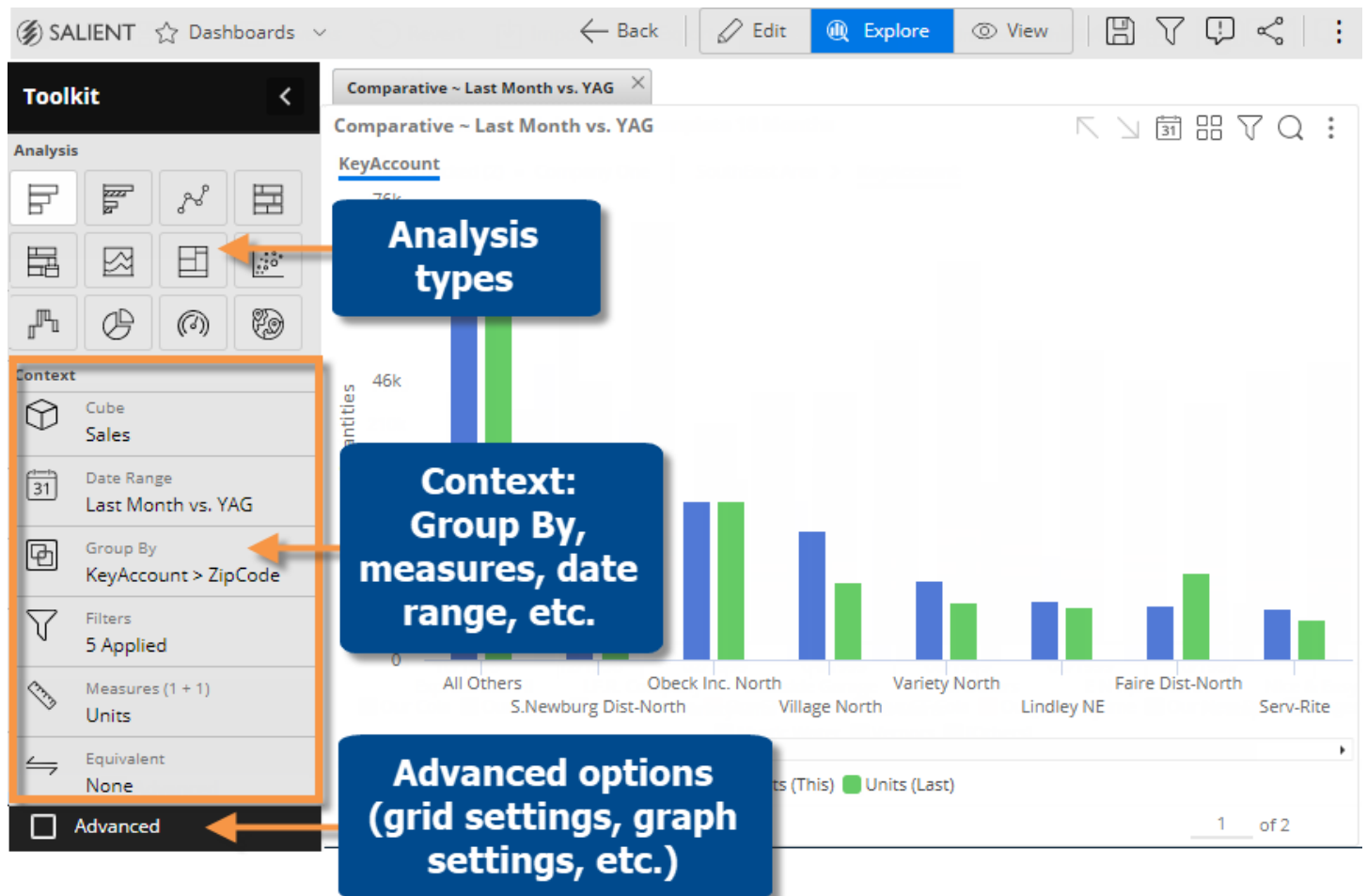
When viewing a dashboard, you can expand any of its widgets in explore mode to dig deeper into the data.

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.



A screenshot of the Salient Dashboards interface in Explore mode. The interface shows a top navigation bar with 'SALIENT', 'Dashboards', and buttons for 'Back', 'Edit', 'Explore' (active), and 'View'. Below the navigation bar is a 'Toolkit' panel on the left and a main data visualization area on the right. The Toolkit panel has sections for 'Analysis' (with various chart icons), 'Context' (with settings for Cube, Date Range, Group By, Filters, Measures, and Equivalents), and an 'Advanced' checkbox. The main area displays a bar chart titled 'Comparative ~ Last Month vs. YAG' with a 'KeyAccount' filter. The chart compares 'Units (This)' and 'Units (Last)' across various locations. Three blue callout boxes with arrows point to specific features: 'Analysis types' points to the Analysis section of the Toolkit; 'Context: Group By, measures, date range, etc.' points to the Context section; and 'Advanced options (grid settings, graph settings, etc.)' points to the Advanced checkbox.

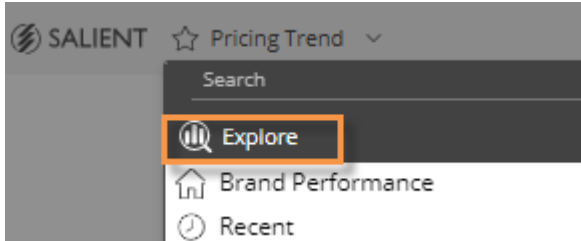
**Analysis types**

**Context: Group By, measures, date range, etc.**

**Advanced options (grid settings, graph settings, etc.)**

## 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 64) including analysis-specific settings such as exception criteria, a scattergram key, and geo measures.
- [Highlight data](#) (see page 65).
- [Duplicate a widget](#) (see page 68).
- [Access advanced options](#) (see page 69) (general settings, grid settings, graph settings, navigation links, and dashboard settings).
- Access more areas of the toolkit, where you can change the date range, add measures, Group By dimensions, and more. These capabilities are also available in view mode but may be more directly accessed via the toolkit in explore mode.

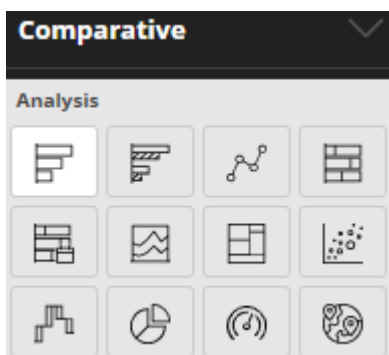
## When you are finished exploring

When you are done exploring, you can:

- Use the browser's back button to go back to your previous dashboard/mode.
- Keep your changes by [saving](#) (see page 80) a new dashboard and/or exporting the dashboard to an SDM file. The resulting dashboard will open in explore mode.

# Change the analysis type in explore mode

1. Select the widget.
2. At the top of the toolkit, click the button of the desired [analysis type](#) (see page 87).





# Highlight data

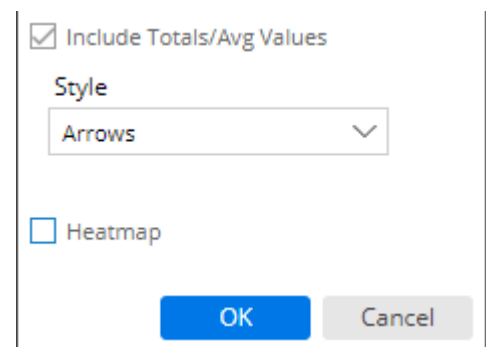
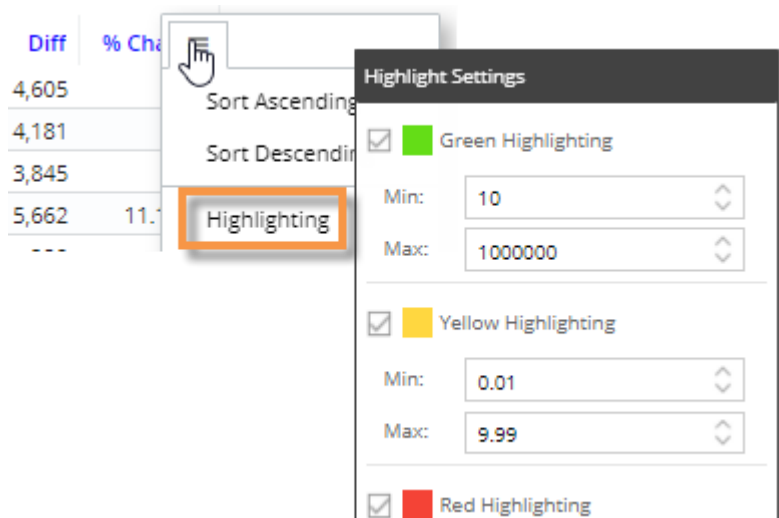
You can highlight data based on custom criteria or percent of the total (i.e., heatmap) to spot areas of concern or importance. The availability of highlighting depends on the widget type.

## Grid highlighting based on custom criteria

<input type="checkbox"/>	SouthEast Area	69,324 ●	4,605	7.12 —
<input type="checkbox"/>	SouthWest Area	65,067 ●	4,181	6.87 —
<input type="checkbox"/>	East Area	58,896	3,845	6.98 —
<input type="checkbox"/>	NorthWest Area	56,410	5,662	11.16 ↑
<input type="checkbox"/>	Near West Area	20,919	-229	-1.08 ↓
<input type="checkbox"/>	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 menu icon ☰.
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**.



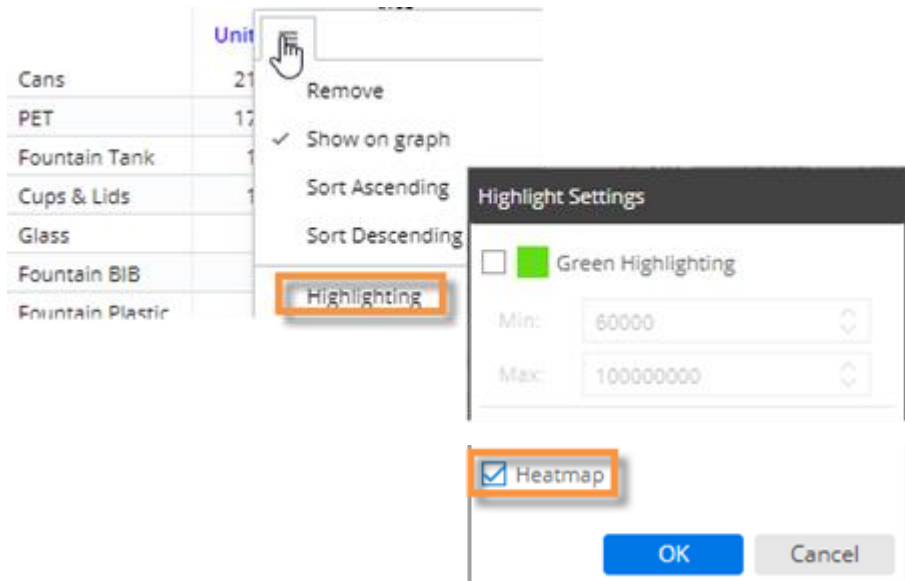
## Heatmap highlighting in grids

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.

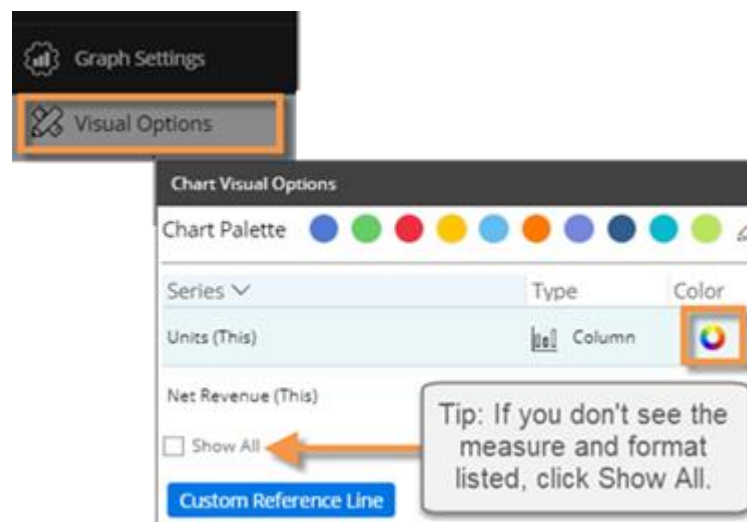
Form	Units ↓	Net Revenue	Margin
> <input type="checkbox"/> Cans	21,320	15,773	7,444
> <input type="checkbox"/> PET	17,360	17,516	9,229
> <input type="checkbox"/> Fountain Tank	1,192	1,718	1,009
> <input type="checkbox"/> Cups & Lids	1,152	101	-35
> <input type="checkbox"/> Glass	962	1,462	628

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**.

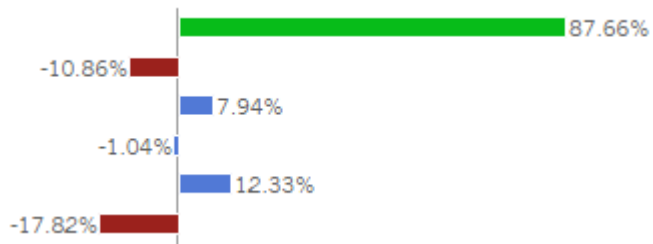


6. Optionally, choose a custom color in Graph Settings, Visual Options. Locate the specific measure and format (e.g., Units for This date range) and then click in the Color column. This color will serve as the darkest shade possible, with other shades calculated accordingly.




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.)

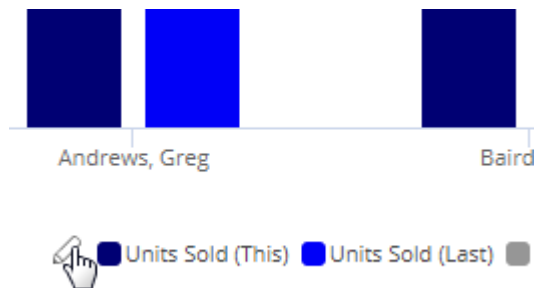
## Graph highlighting







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.

Series	Type	Color	Style	Size
Units Sold (This)	Column		N/A	80%
Units Sold (Last)	Column		N/A	80%
Net Revenue (This)	Marker		N/A	80%
Net Revenue (Last)	Marker		N/A	80%

☒ Use Highlight Settings [Highlight Settings](#)

## 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.

**Highlight Settings**

☒ ■ Green Highlighting

Min: 10000

Max: 10000000

☒ ■ Yellow Highlighting

Min: 5000

☒ Include Totals/Avg Values

Style: Arrows

☐ Heatmap

OK Cancel

## Duplicate a widget

When you duplicate a widget in [explore mode](#) (see page 63), 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

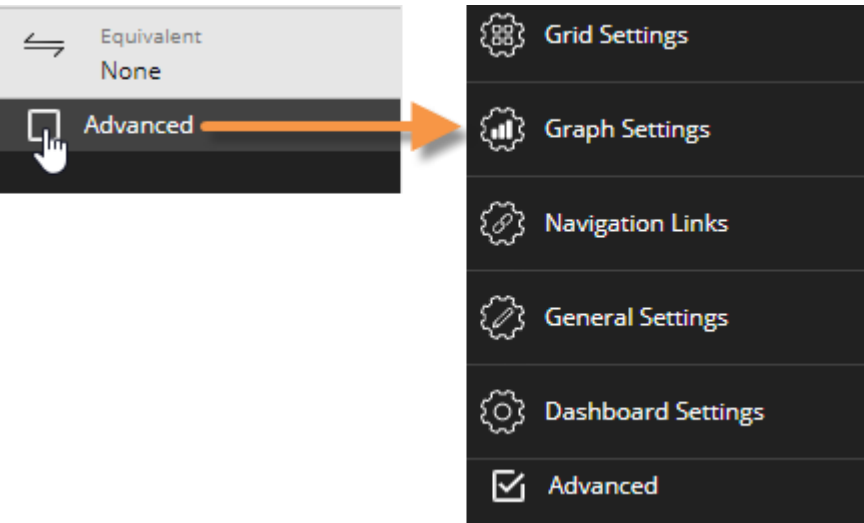
1. In explore mode, select the widget/tab you want to duplicate.
2. On the widget title bar, click the menu button and select Duplicate Widget, or press **+** on the keyboard.
3. Make changes to the new widget as desired.

# Advanced options for exploring

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.



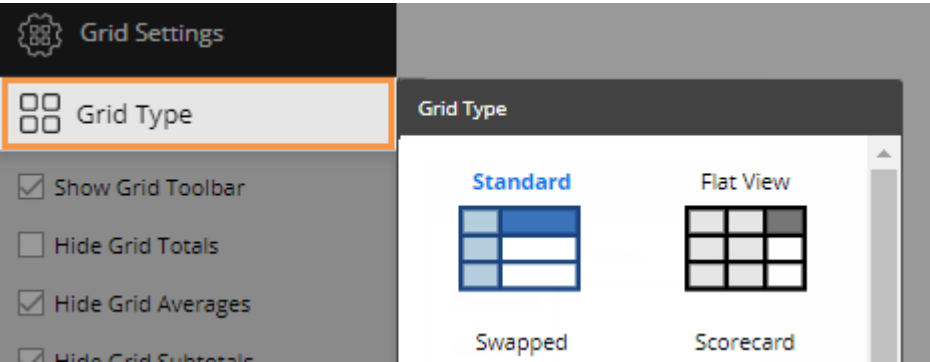
The following settings become available.

Area	Settings
Grid Settings	Grid page size, infinite scrolling, show/hide totals, <a href="#">grid types</a> (see page 70), etc.
Graph Settings	Graph page size; orientation; show/hide legend, axis, labels; <a href="#">visual options</a> (see page 73), trellis, etc.
Navigation Links	Embedded links to other dashboards
General Settings	Widget title, style, size, position, transparency, enable/disable options for view mode, etc.
Dashboard Settings	<a href="#">Member coloring</a> (see page 76), host code display settings, Knowledge Manager settings, metric coloring in grids, etc.


# Grid types in explore mode

The grid type affects the layout of columns and rows. In addition, some grid types affect the format of graphs when [auto-expand is on](#) (see page 31). To change the grid type, go to Grid Settings in the toolkit and click on Grid Type. The available types depend on the selected widget.

**Tip:** In explore mode, check ☐ **Advanced** at the bottom of the toolkit to access settings.



Grid type	Example	Explanation																																								
Standard	<table><tr><th colspan="2"></th><th colspan="3">Units</th></tr><tr><th colspan="2">Region</th><th>This ↓</th><th>Last</th><th>% Change</th></tr><tr><td>&gt;</td><td><input type="checkbox"/> SouthEast Area</td><td>73,794</td><td>116,284</td><td>-36.54</td></tr><tr><td>&gt;</td><td><input type="checkbox"/> SouthWest Area</td><td>60,364</td><td>89,170</td><td>-32.30</td></tr><tr><td>&gt;</td><td><input type="checkbox"/> NorthWest Area</td><td>57,685</td><td>83,206</td><td>-30.67</td></tr><tr><td>∨</td><td><input type="checkbox"/> East Area</td><td>57,196</td><td>85,956</td><td>-33.46</td></tr><tr><td></td><td>&gt; Carbonated</td><td>54,648</td><td>82,242</td><td>-33.55</td></tr><tr><td></td><td>&gt; Non-Carb</td><td>1,956</td><td>2,966</td><td>-34.05</td></tr></table>			Units			Region		This ↓	Last	% Change	>	<input type="checkbox"/> SouthEast Area	73,794	116,284	-36.54	>	<input type="checkbox"/> SouthWest Area	60,364	89,170	-32.30	>	<input type="checkbox"/> NorthWest Area	57,685	83,206	-30.67	∨	<input type="checkbox"/> East Area	57,196	85,956	-33.46		> Carbonated	54,648	82,242	-33.55		> Non-Carb	1,956	2,966	-34.05	<p>In general, a standard grid shows measures in columns and members in rows.</p> <p>Expanded dimensions will be in a "tree."</p>
		Units																																								
Region		This ↓	Last	% Change																																						
>	<input type="checkbox"/> SouthEast Area	73,794	116,284	-36.54																																						
>	<input type="checkbox"/> SouthWest Area	60,364	89,170	-32.30																																						
>	<input type="checkbox"/> NorthWest Area	57,685	83,206	-30.67																																						
∨	<input type="checkbox"/> East Area	57,196	85,956	-33.46																																						
	> Carbonated	54,648	82,242	-33.55																																						
	> Non-Carb	1,956	2,966	-34.05																																						

Grid type	Example	Explanation																																						
	<div><table><tr><td rowspan="3">Our Cola</td><td>Cans</td><td></td></tr><tr><td>PET</td><td></td></tr><tr><td>Glass</td><td></td></tr><tr><td rowspan="2">Our Neon</td><td>PET</td><td></td></tr><tr><td>Cans</td><td></td></tr><tr><td rowspan="3">Our DietCola</td><td>Cans</td><td></td></tr><tr><td>PET</td><td></td></tr><tr><td>Glass</td><td></td></tr></table></div>	Our Cola	Cans		PET		Glass		Our Neon	PET		Cans		Our DietCola	Cans		PET		Glass		<p>In <a href="#">graphs with auto-expanded dimensions</a> (see page 31), the standard grid type will cause members to be grouped under the parent category.</p>																			
Our Cola	Cans																																							
	PET																																							
	Glass																																							
Our Neon	PET																																							
	Cans																																							
Our DietCola	Cans																																							
	PET																																							
	Glass																																							
Flat view	<table><tr><th rowspan="2">Region</th><th rowspan="2">Type</th><th colspan="3">Units</th></tr><tr><th>This ↓</th><th>Last</th><th>% Change</th></tr><tr><td>&gt; SouthEast Area</td><td>Carbonated</td><td>67,439</td><td>106,188</td><td>-36.49</td></tr><tr><td>&gt; SouthWest Area</td><td>Carbonated</td><td>57,028</td><td>84,426</td><td>-32.45</td></tr><tr><td>&gt; NorthWest Area</td><td>Carbonated</td><td>54,707</td><td>79,084</td><td>-30.82</td></tr><tr><td>&gt; East Area</td><td>Carbonated</td><td>54,648</td><td>82,242</td><td>-33.55</td></tr><tr><td>&gt; Near West Area</td><td>Carbonated</td><td>16,829</td><td>24,866</td><td>-32.32</td></tr><tr><td>&gt; SouthEast Area</td><td>Non-Carb</td><td>5,067</td><td>8,340</td><td>-39.24</td></tr></table>	Region	Type	Units			This ↓	Last	% Change	> SouthEast Area	Carbonated	67,439	106,188	-36.49	> SouthWest Area	Carbonated	57,028	84,426	-32.45	> NorthWest Area	Carbonated	54,707	79,084	-30.82	> East Area	Carbonated	54,648	82,242	-33.55	> Near West Area	Carbonated	16,829	24,866	-32.32	> SouthEast Area	Non-Carb	5,067	8,340	-39.24	<p>The <a href="#">flat view grid</a> (see page 30) is like the standard format except it places expanded dimensions in separate columns so rows can be treated independently.</p>
Region	Type			Units																																				
		This ↓	Last	% Change																																				
> SouthEast Area	Carbonated	67,439	106,188	-36.49																																				
> SouthWest Area	Carbonated	57,028	84,426	-32.45																																				
> NorthWest Area	Carbonated	54,707	79,084	-30.82																																				
> East Area	Carbonated	54,648	82,242	-33.55																																				
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> SouthEast Area	Non-Carb	5,067	8,340	-39.24																																				

Grid type	Example	Explanation																	
	<div><div><div>Our Cola / Cans</div><div>Our Cola / PET</div><div>Our Neon / PET</div><div>Our DietCola / Cans</div><div>Our DietCola / PET</div><div>Our Neon / Cans</div><div>Our SF CF Cola / Cans</div><div>Our CF Cola / Cans</div><div>Our CF Cola / PET</div></div><div><div>Our Cola / Cans</div><div>Our Cola / PET</div><div>Our Neon / PET</div><div>Our DietCola / Cans</div></div></div>	In <a href="#">graphs with auto-expanded dimensions</a> (see page 31), the flat view displays combinations of members in a single level. The combinations can be sorted independently.																	
Swapped	<table><tr><td></td><td>Region</td><td>SouthEast Area</td><td>SouthWest Area</td></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>		Region	SouthEast Area	SouthWest Area	Units Sold	This	1,145,423	968,805	Last	1,012,078	907,021	Diff	133,345	61,784	% Change	13.18	6.81	In a swapped grid, columns and rows are switched.
	Region	SouthEast Area	SouthWest Area																
Units Sold	This	1,145,423	968,805																
	Last	1,012,078	907,021																
	Diff	133,345	61,784																
	% Change	13.18	6.81																
Scorecard	<table><tr><td></td><td>This</td><td>Last</td><td>Diff</td><td>% Change</td></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>		This	Last	Diff	% Change	Units Sold	4,257,862	3,915,236	342,626	8.75	Net Revenue	38,565,105	35,313,796	3,251,310	9.21	The scorecard grid shows measures in rows and timeframes (This, Last, difference, etc.) in columns; does not compare members.		
	This	Last	Diff	% Change															
Units Sold	4,257,862	3,915,236	342,626	8.75															
Net Revenue	38,565,105	35,313,796	3,251,310	9.21															
Scorecard swapped	<table><tr><td></td><td>Units Sold</td><td>Net Revenue</td></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>		Units Sold	Net Revenue	This	4,257,862	38,565,105	Last	3,915,236	35,313,796	Diff	342,626	3,251,310	% Change	8.75	9.21	The swapped scorecard shows measures in columns and timeframes (This, Last, difference, etc.) in rows; does not compare members.		
	Units Sold	Net Revenue																	
This	4,257,862	38,565,105																	
Last	3,915,236	35,313,796																	
Diff	342,626	3,251,310																	
% Change	8.75	9.21																	




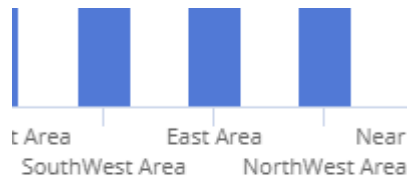
# Visual options

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).

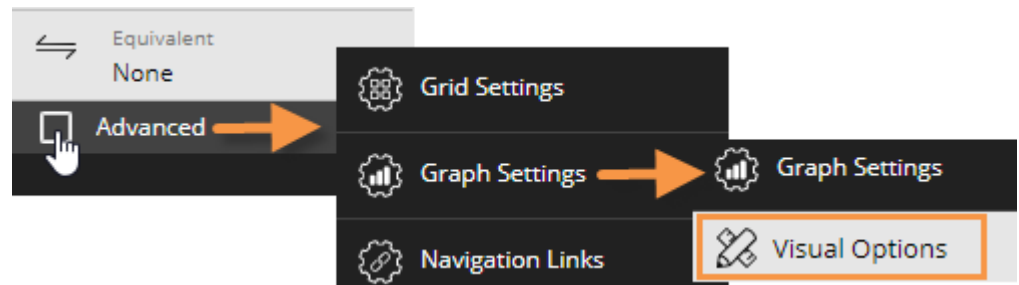


*In explore mode:*


Checkmark **Advanced** at the bottom of the toolkit.

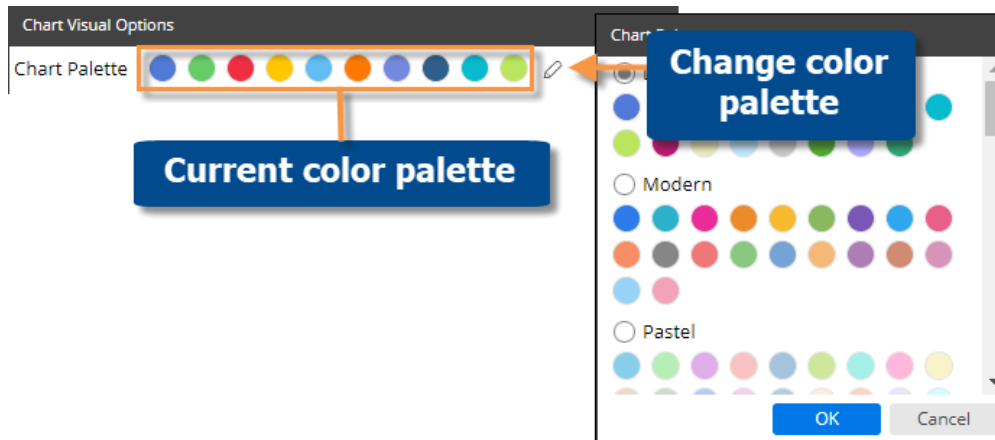
Expand Graph Settings.

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 most 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:

**Type:** line, column (i.e., bar), area, or marker

**Color**

- = auto-select
- = highlight
- (solid) = user-selected

**Point or line style**

**Size:** width, thickness, etc.

Series	Type	Color	Style	Size
Units Sold (This)	Column		N/A	80%
Units Sold (Last)	Column		N/A	80%
Net Revenue (This)	Marker			4px
Net Revenue (Last)	Marker			4px
Average Volume				2px

☐ Show All

Custom Reference Line

OK Cancel Delete

**Color Picker** Turn on highlighting

☐ Use Highlight Settings Highlight Settings

Pick a color

Clear color (auto-select)

Hex Value: 333333

Clear

OK Cancel



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

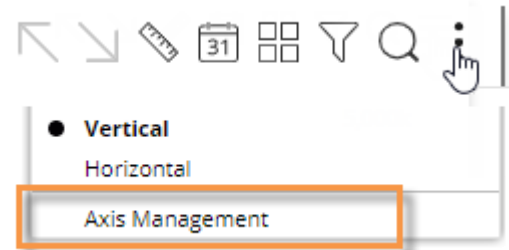
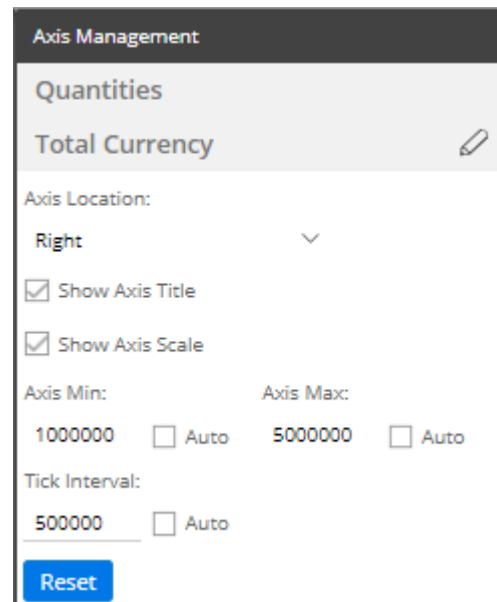
# Axis management

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

To customize axes

Before proceeding, add the desired measures.

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 .
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.



 A screenshot of the 'Axis Management' configuration panel. The panel has a dark header with the title 'Axis Management'. Below the header, there are two sections: 'Quantities' and 'Total Currency', each with a pencil icon to its right. Under 'Total Currency', the 'Axis Location' is set to 'Right' with a dropdown arrow. There are two checked checkboxes: 'Show Axis Title' and 'Show Axis Scale'. Below these, there are two rows of settings: 'Axis Min' with a value of '1000000' and an 'Auto' checkbox, and 'Axis Max' with a value of '5000000' and an 'Auto' checkbox. A 'Tick Interval' section shows a value of '500000' and an 'Auto' checkbox. At the bottom of the panel is a blue 'Reset' button.

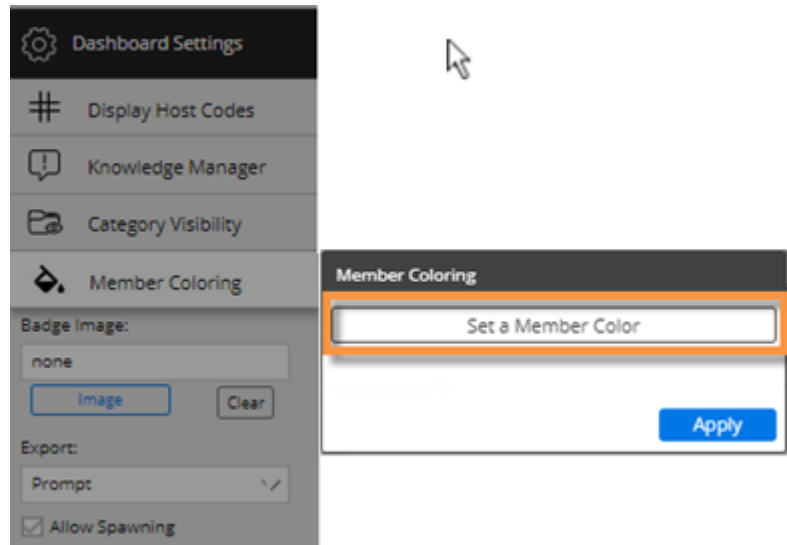
# Member coloring

You can assign custom colors to specific dimension members to enhance visual understanding in some types of graphs. For example, you might assign blue to represent a certain region. The colors will be applied consistently in all applicable widgets, which include Mix, Share Trend, and some Crosstab graphs (see the following tips), within the dashboard. For members with assigned colors, the member coloring will override the [color palette](#) (see page 73). Member colors do not carry over from one dashboard to another; however, you can [import settings for member coloring](#) (see page 79).

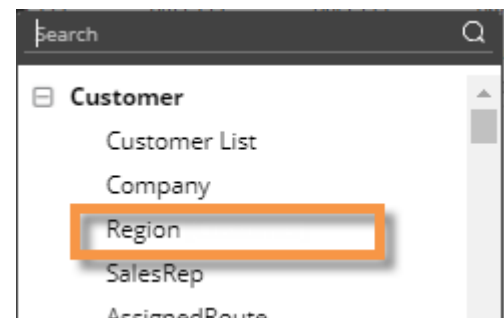
To apply member coloring

1. In explore mode, click on **Advanced** at the bottom of the toolkit.
2. In the toolkit, expand **Dashboard Settings**, and click on **Member Coloring**.
3. Click on **Set a Member Color**.

**Tip:** This menu shows a summary of the member colors that have already been defined. You can click on a dimension to edit its colors.

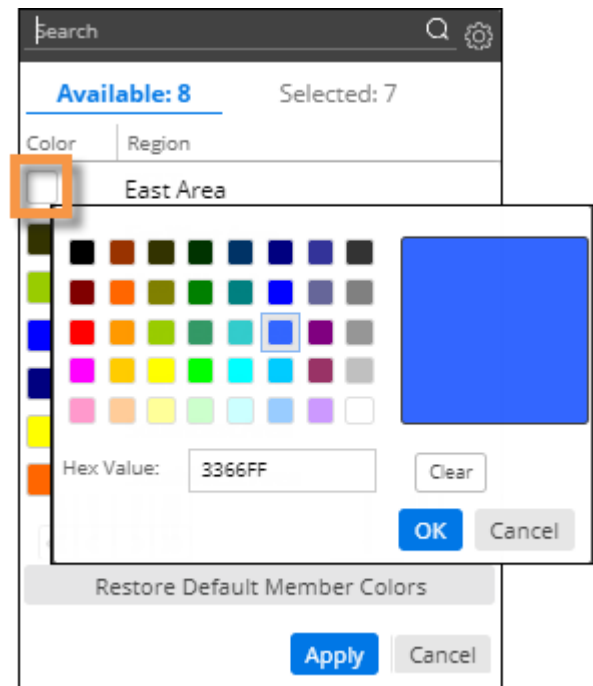


4. In the next menu, choose the dimension.

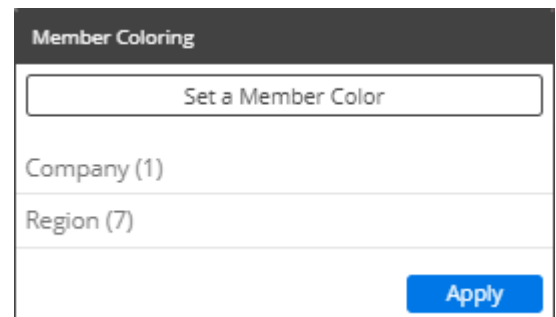


## To apply member coloring

5. Locate a member to which you want to assign a color. If you wish, you can search for a member.
6. Click the square beside the member and choose a color. Repeat this step to choose colors for additional members. You may skip a member(s); in this case, the default color from the palette will be applied to the member(s).
7. When you are finished choosing colors for a dimension, click **Apply**.



8. Click **Apply**, or repeat this procedure to choose coloring for additional dimensions.

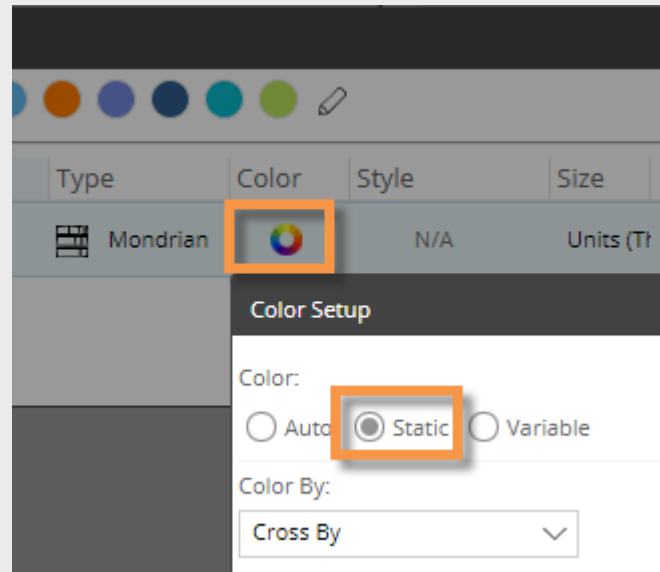


**Tips:**

Only Mix, Share Trend, and Crosstab graphs with static colors show member coloring, because other types of widgets use coloring to represent measures, percent change, pass/fail, etc.

To turn on static colors for a Crosstab so that member coloring can be utilized, go to its color setup in **Visual Options**.

*Crosstab static coloring (in visual options):*

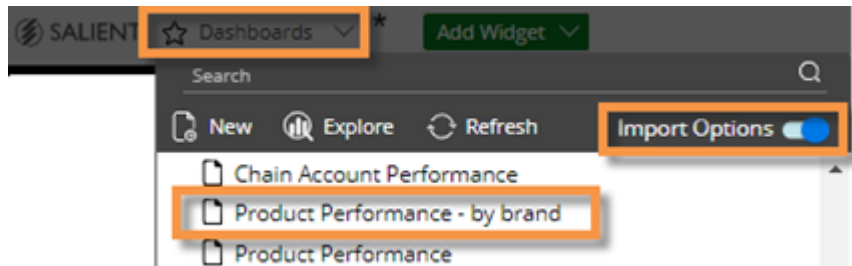


# Import dashboard options

You can import settings from other dashboards. For example, you might want to import filters, member coloring, and other dashboard settings.

To import dashboard options

1. Open the dashboard to which you want to apply the settings.
2. Go to the dashboards menu at the top of the screen.
3. Turn on **Import Options**.
4. Click on the name of the dashboard that has the settings you want to import.



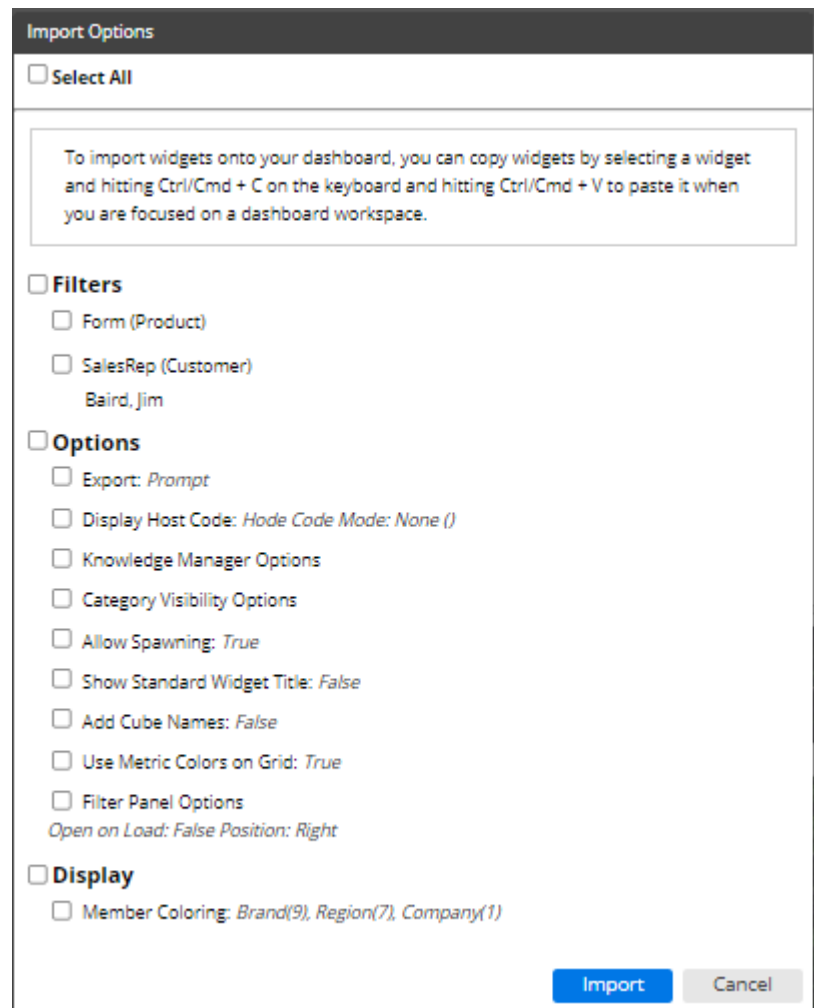
5. In the Import Options dialog, check the settings you wish to import, or check Select All to quickly import all available settings.

**Filters** - includes filters that have been applied to the workspace. (Workspace filters associated with filter widgets are not available for import.)

**Options** - include various dashboard settings.

**Display** - includes settings for custom [coloring of members](#) (see page 76) and may also include a background image and badge image (if used).

6. Click **Import**.



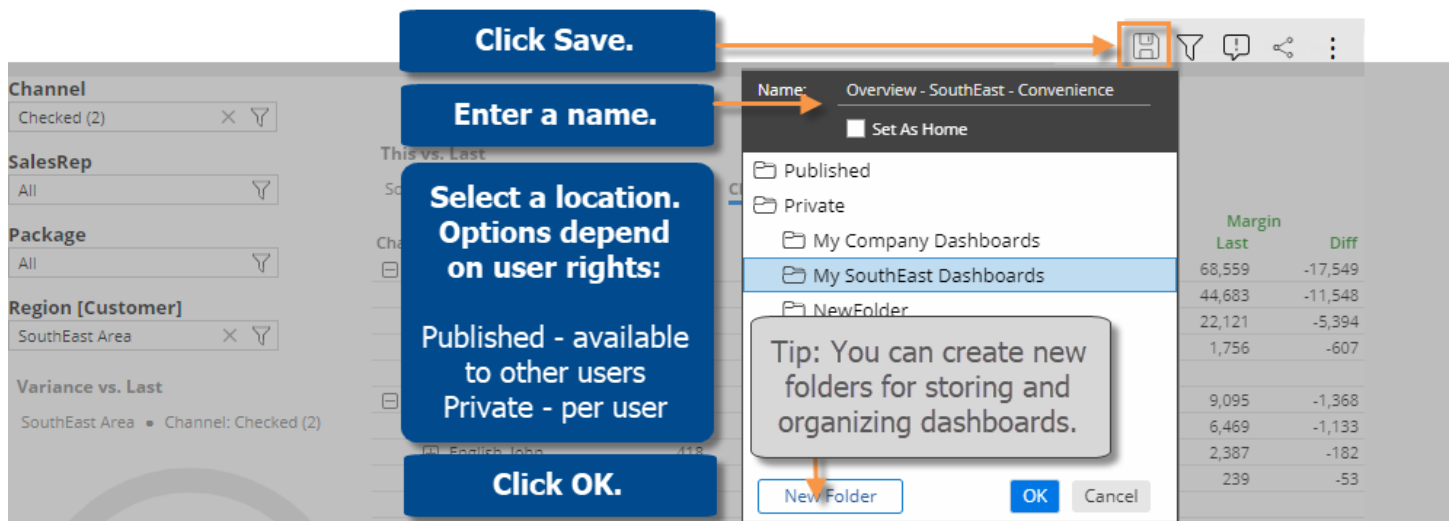
# Save and Share

## Save a dashboard

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 81).




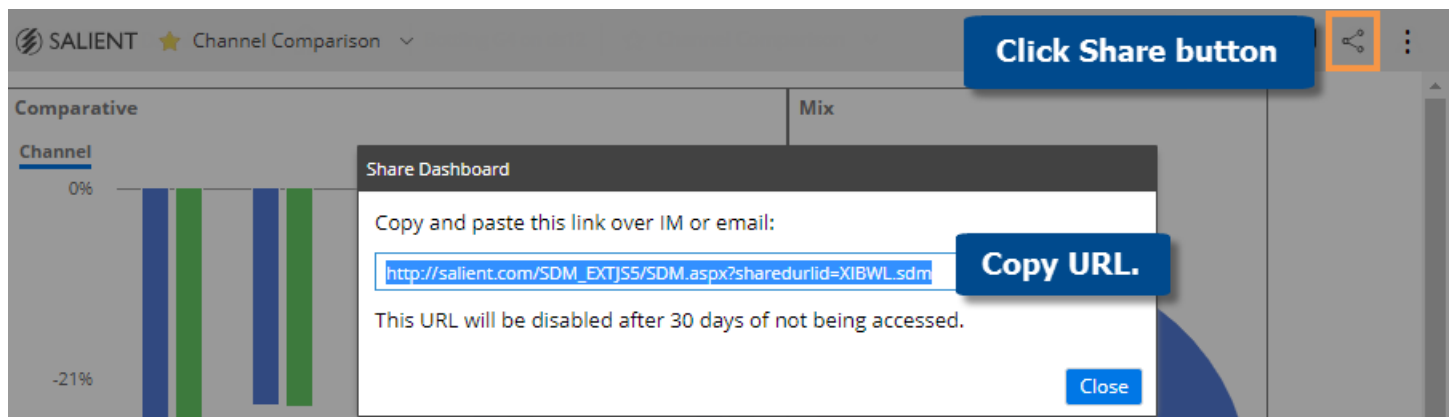
# Share a dashboard

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

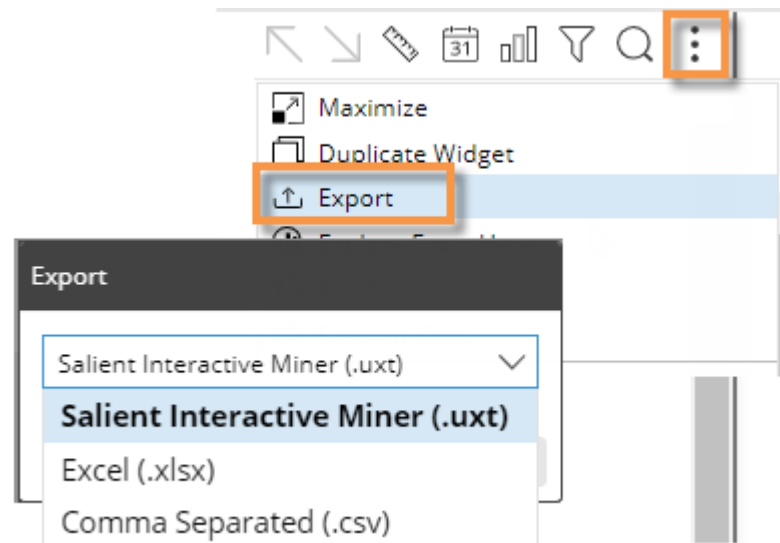
You can export the data from a widget to one of the following file types, depending on dashboard and widget settings. This option is available in a grid or graph; however, only the data (i.e. not the graph) will be included in Excel and comma-separated value files.

- UXT file (.uxt), which can be opened in SIM to go to approximately the same view as the dashboard. Because SIM and dashboards have functionality differences, the view may have minor differences.
- Excel (.xlsx) - includes a header and the data.
- Comma-separated value (.csv) - includes a header and the data.

Alternatively, you can [create a pdf file](#) (see page 83) containing the data.

### 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.



### For Excel and comma-separated files:

4. If the widget has checked members and/or multiple pages, choose what to export: all rows, only rows in the current page of data, or only the checked rows (if rows are checked).

:

5. In the **Export Expansions** section, choose what to expand to the next level of data (only available if multiple Group Bys are configured).

#### **Current Grid Expansions** -

expands the same members as the current grid. If no members are expanded, the file will show top-level data.

**Expand and Export to** - expands all members at the specified level and above regardless of what is expanded in the current grid. This option is similar to auto-expansion.

These options are different for record details (see below).

**Export**

☒ All Rows

☐ Rows on This Page

☐ Checked Rows

**Export Expansions**

☒ Current Grid Expansions

☐ Expand And Export To

1. Department

☐ Include Subtotal Rows

In addition, you can include or omit subtotal rows for any expanded members. Be aware that with this option checked, the data includes duplicates and a simple totaling of a column may yield incorrect results. For example:

Region	SalesRep	Units
Near West Area		20898
Near West Area	Office-Ferkel	4116
Near West Area	Office-Lasoski	3730
Near West Area	Office-Kinser	
Near West Area	Office Accounts	
Near West Area	Special Event	919

**Subtotals row**

**Expanded rows**

- Optionally, check **Include Host Code Columns** option to include a column(s) for the host codes of the members. If members are expanded, this option will also include host codes for subgroupings.
- Specify the file name to use.
- Click **OK**.

## Exporting record details


In general, you can choose the level of data to expand during the export process (see step 5 above). However, this capability is different for record details due to the large number of data records that are possible. Use one of the following options to export record-level data:

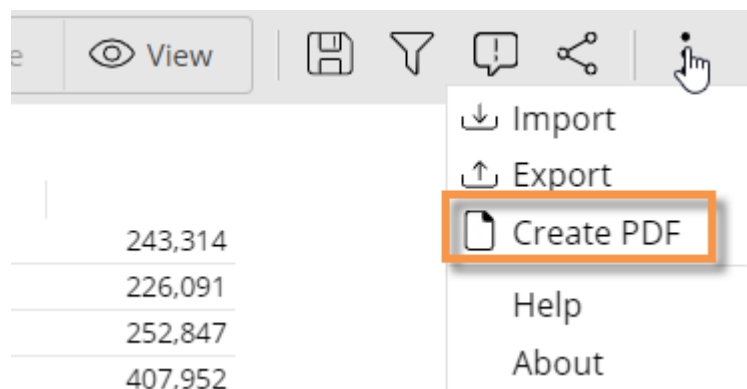
- Choose Record Details as the 1st By prior to exporting. The resulting file will show data at this level. Expansion options will not be available during the export process.
- Choose Record Details as the 2nd By prior to exporting. During the export process, you can optionally choose to expand data down to record details for all members (e.g., all accounts expanded into record details); however, be aware that the file will only include the first 1,000 records for each member of the 1st By.
- Choose Record Details as a By further down in the drill order and expand dimensions individually prior to exporting. The file will only include the first 1,000 records for any given dimension.

## Create a PDF

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

To create a PDF

- Open the dashboard.
- Click  in the upper-right corner of the screen.
- Click **Create PDF** in the menu.
- In the dialog, enter a file name or leave as is to use the default file name.
- 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

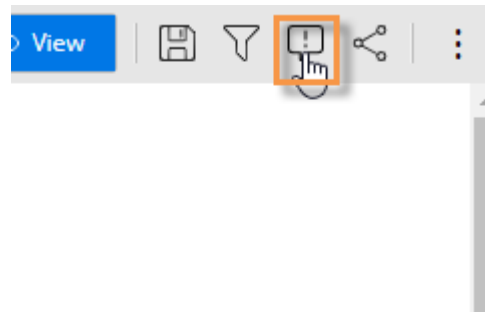
Knowledge Manager enables users to organize thoughts or “soft knowledge” for collaboration. You can add text descriptions, upload images or other resources, and add comments. In addition, this information can be shared between all users across multiple devices in SIM, Salient Dashboards, and the Salient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

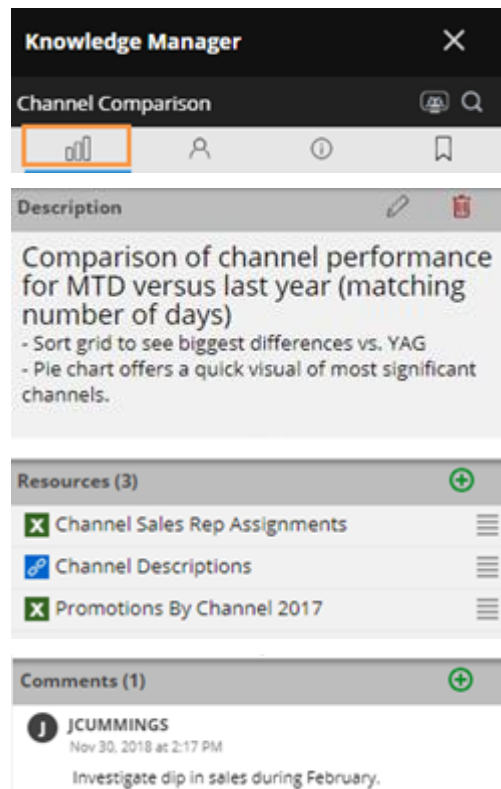
**Tip:** The use of Knowledge Manager depends on your user account rights.



## 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.



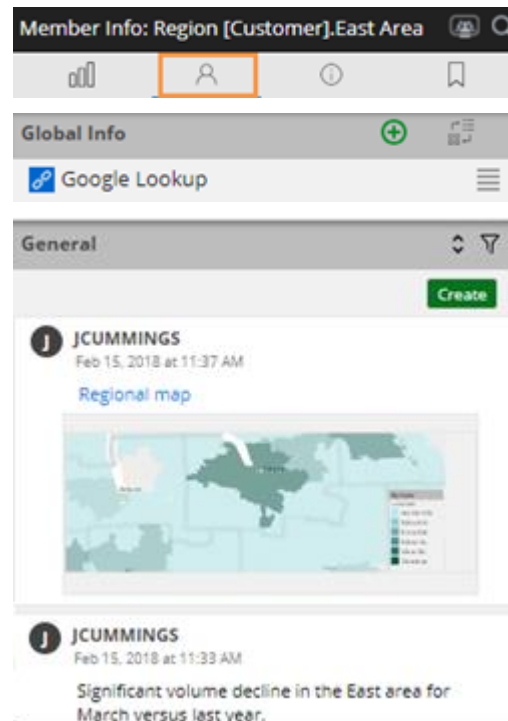
## Member Info

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.

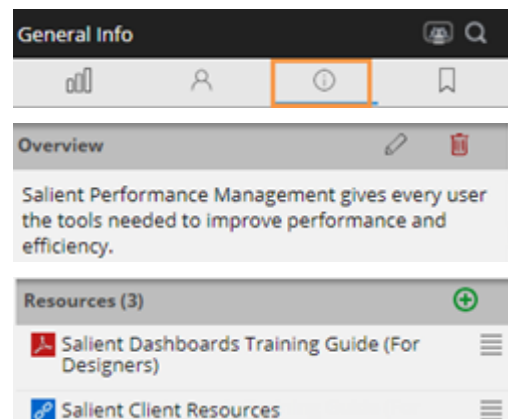
Media examples include news stories, events or related websites.

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



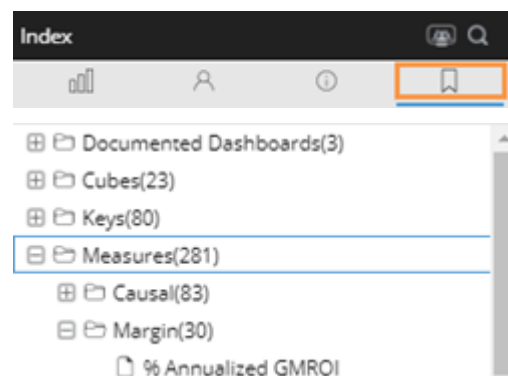
## General Info

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, you can [change the analysis type](#) (see page 64). In any mode, you can switch between [grid and graph formats](#) (see page 13) (if enabled for the widget).

Analysis type

Examples

Comparative

Comparison of members for one or two date ranges; any number measures.


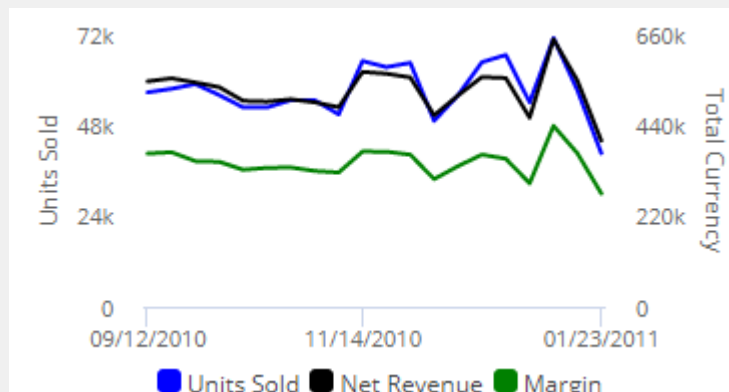

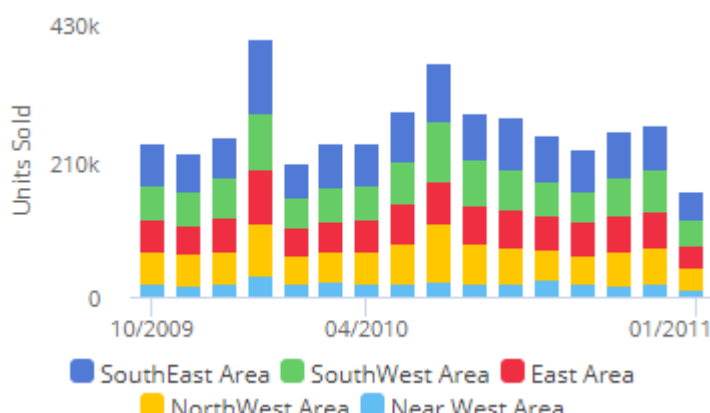

Region	Units		Margin	
	This ↓	% Change	This	% Change
> <input type="checkbox"/> SouthEast Area	69,324	7.12	272,800	0.00
> <input type="checkbox"/> SouthWest Area	65,067	6.87	240,924	1.70
> <input type="checkbox"/> East Area	58,896	6.98	194,826	-4.60
> <input type="checkbox"/> NorthWest Area	56,410	11.16	233,965	4.84
> <input type="checkbox"/> Near West Area	20,919	-1.08	116,312	8.00
> <input type="checkbox"/> NorthEast Area	289	-2.03	985	23.26
Total (6)	270,905	7.14	1,059,811	1.36


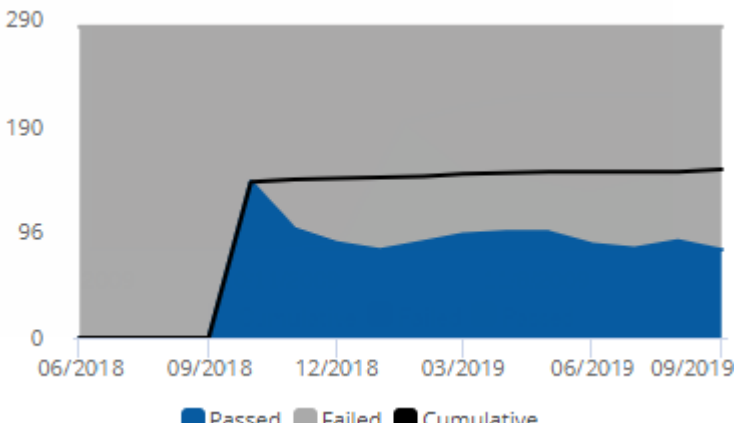

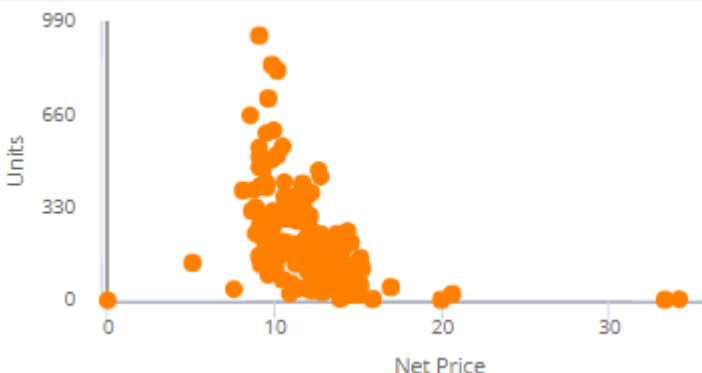


Region	Units Sold (This)	Margin (This)
SouthEast Area	69,324	272,800
SouthWest Area	65,067	240,924
East Area	58,896	194,826
NorthWest Area	56,410	233,965


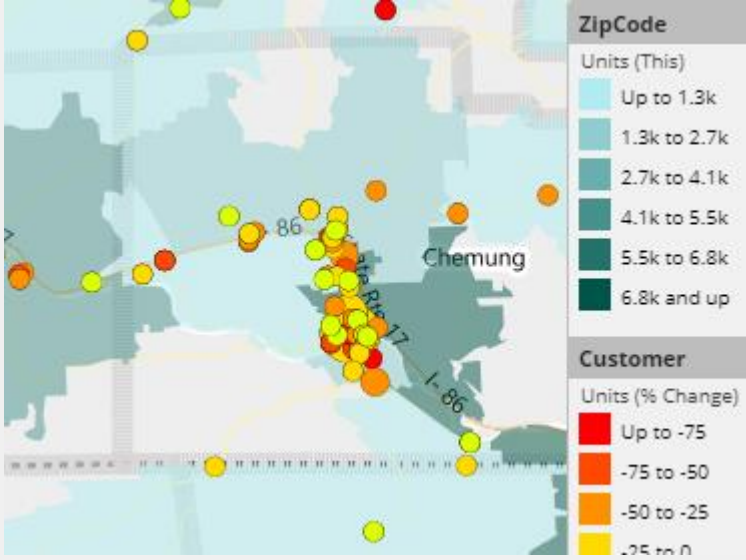

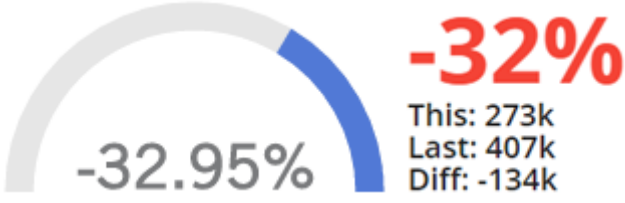

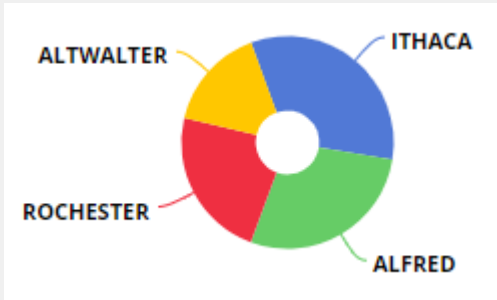
Product	Units Sold [This vs Last]	Net Revenue [This vs Last]
Our Cola	-10.0%	-5.0%
Our Neon	-0.5%	12.0%
Our DietCola	-15.0%	-10.0%
Our Lemon-Lime	-25.0%	-12.0%
Our SF CF Cola	-30.0%	-15.0%

Analysis type	Examples																																																
<div><div><div></div><div></div></div><div>Crosstab</div></div> <p>Comparison grid or graph that organizes data by two different attributes (i.e., dimensions) to examine cross-sections of data.</p>	<table><thead><tr><th>Region</th><th>Our Cola</th><th>Our Neon</th><th>Our DietCola</th><th>Our Lemon-Lime</th></tr></thead><tbody><tr><td>&gt; <input type="checkbox"/> SouthEast Area</td><td>27,332</td><td>10,090</td><td>9,316</td><td>2,650</td></tr><tr><td>&gt; <input type="checkbox"/> SouthWest Area</td><td>27,513</td><td>8,239</td><td>9,750</td><td>3,362</td></tr><tr><td>&gt; <input type="checkbox"/> East Area</td><td>25,313</td><td>10,343</td><td>8,364</td><td>2,644</td></tr><tr><td>&gt; <input type="checkbox"/> NorthWest Area</td><td>23,342</td><td>9,620</td><td>7,189</td><td>2,358</td></tr><tr><td>&gt; <input type="checkbox"/> Near West Area</td><td>5,634</td><td>2,352</td><td>2,772</td><td>868</td></tr><tr><td>&gt; <input type="checkbox"/> NorthEast Area</td><td>182</td><td>10</td><td>32</td><td>11</td></tr><tr><td>Total (6)</td><td>109,316</td><td>40,654</td><td>37,423</td><td>11,893</td></tr></tbody></table> <div><div>Regional Chains</div><div>Our ColaOur NeonOur DietC...Our...</div><div>Conv With Gas</div><div>Our NeonOur D...</div><div>Other Groceries</div><div>Our NeonOur Di...</div><div>Mass Merchandisers</div><div>Our DietColaOur NeonO...</div></div>	Region	Our Cola	Our Neon	Our DietCola	Our Lemon-Lime	> <input type="checkbox"/> SouthEast Area	27,332	10,090	9,316	2,650	> <input type="checkbox"/> SouthWest Area	27,513	8,239	9,750	3,362	> <input type="checkbox"/> East Area	25,313	10,343	8,364	2,644	> <input type="checkbox"/> NorthWest Area	23,342	9,620	7,189	2,358	> <input type="checkbox"/> Near West Area	5,634	2,352	2,772	868	> <input type="checkbox"/> NorthEast Area	182	10	32	11	Total (6)	109,316	40,654	37,423	11,893								
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<div><div><div></div><div></div></div><div>Multi Comparative</div></div> <p>Comparison of members for any number of date ranges and measures; <a href="#">column filters</a> (see page 52) may be applied to focus on specific subsets of data and provide dynamic <a href="#">benchmark comparisons</a> (see page 54).</p>	<table><thead><tr><th rowspan="3">Region</th><th colspan="2">Last Month vs. YAG</th><th colspan="2">Last Year vs. YAG</th></tr><tr><th colspan="2">Units</th><th colspan="2">Units</th></tr><tr><th>This ↓</th><th>% Change</th><th>This</th><th>% Change</th></tr></thead><tbody><tr><td>&gt; <input type="checkbox"/> SouthEast Area</td><td>69,324</td><td>7.12</td><td>910,342</td><td>17.80</td></tr><tr><td>&gt; <input type="checkbox"/> SouthWest Area</td><td>65,067</td><td>6.87</td><td>762,082</td><td>9.38</td></tr><tr><td>&gt; <input type="checkbox"/> East Area</td><td>58,896</td><td>6.98</td><td>706,588</td><td>10.04</td></tr><tr><td>&gt; <input type="checkbox"/> NorthWest Area</td><td>56,410</td><td>11.16</td><td>703,359</td><td>12.11</td></tr><tr><td>&gt; <input type="checkbox"/> Near West Area</td><td>20,919</td><td>-1.08</td><td>279,479</td><td>12.90</td></tr><tr><td>&gt; <input type="checkbox"/> NorthEast Area</td><td>289</td><td>-2.03</td><td>5,114</td><td>-40.75</td></tr><tr><td>Total (6)</td><td>270,905</td><td>7.14</td><td>3,366,964</td><td>12.41</td></tr></tbody></table> <div><div>% Change</div><div><div>35%</div><div>-2.6%</div><div>-40%</div></div><div><div>3rd Party Operators</div><div>All Othr On Premise</div><div>Bars / Taverns</div><div>Beverage Centers</div><div>Churches</div></div><div><div>Units Sold [This vs Last] (Month To Date vs. YAG)</div><div>Units Sold [This vs Last] (Last 12 Months vs. YAG)</div></div></div>	Region	Last Month vs. YAG		Last Year vs. YAG		Units		Units		This ↓	% Change	This	% Change	> <input type="checkbox"/> SouthEast Area	69,324	7.12	910,342	17.80	> <input type="checkbox"/> SouthWest Area	65,067	6.87	762,082	9.38	> <input type="checkbox"/> East Area	58,896	6.98	706,588	10.04	> <input type="checkbox"/> NorthWest Area	56,410	11.16	703,359	12.11	> <input type="checkbox"/> Near West Area	20,919	-1.08	279,479	12.90	> <input type="checkbox"/> NorthEast Area	289	-2.03	5,114	-40.75	Total (6)	270,905	7.14	3,366,964	12.41
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<div> Exception</div> <div>Pass and fail of key members for an exception test (e.g., customers with units &gt;=1)</div>	<div><table><tr><th>Channel</th><th>Totals ↓</th><th>Passed</th><th>% Passed</th><th>Failed</th><th>% Failed</th></tr><tr><td>&gt; <input type="checkbox"/> All Othr On Premise</td><td>1,122</td><td>184</td><td>16.4</td><td>938</td><td>83.6</td></tr><tr><td>&gt; <input type="checkbox"/> Industrial</td><td>578</td><td>303</td><td>52.4</td><td>275</td><td>47.6</td></tr><tr><td>&gt; <input type="checkbox"/> Schools</td><td>459</td><td>330</td><td>71.9</td><td>129</td><td>28.1</td></tr><tr><td>&gt; <input type="checkbox"/> Recreation</td><td>444</td><td>215</td><td>48.4</td><td>229</td><td>51.6</td></tr><tr><td>&gt; <input type="checkbox"/> Restaurants</td><td>411</td><td>245</td><td>59.6</td><td>166</td><td>40.4</td></tr><tr><td>&gt; <input type="checkbox"/> Fast Food</td><td>395</td><td>266</td><td>67.3</td><td>129</td><td>32.7</td></tr><tr><td>&gt; <input type="checkbox"/> Other Groceries</td><td>283</td><td>182</td><td>64.3</td><td>101</td><td>35.7</td></tr><tr><td>&gt; <input type="checkbox"/> Colleges</td><td>262</td><td>230</td><td>87.8</td><td>32</td><td>12.2</td></tr><tr><td>Total (38)</td><td>5,863</td><td>3,166</td><td>54.0</td><td>2,697</td><td>46.0</td></tr></table></div>	Channel	Totals ↓	Passed	% Passed	Failed	% Failed	> <input type="checkbox"/> All Othr On Premise	1,122	184	16.4	938	83.6	> <input type="checkbox"/> Industrial	578	303	52.4	275	47.6	> <input type="checkbox"/> Schools	459	330	71.9	129	28.1	> <input type="checkbox"/> Recreation	444	215	48.4	229	51.6	> <input type="checkbox"/> Restaurants	411	245	59.6	166	40.4	> <input type="checkbox"/> Fast Food	395	266	67.3	129	32.7	> <input type="checkbox"/> Other Groceries	283	182	64.3	101	35.7	> <input type="checkbox"/> Colleges	262	230	87.8	32	12.2	Total (38)	5,863	3,166	54.0	2,697	46.0
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Analysis type	Examples
 <i>Exception Time Series</i> Pass and fail of key members for an exception test over time	 <p>290 190 96 0</p> <p>06/2018 09/2018 12/2018 03/2019 06/2019 09/2019</p> <p>Passed Failed Cumulative</p>
 <i>Scattergram</i> Plot of members for two measures to show trends and outliers. The points can represent key members (e.g., customers) or dimension members (e.g., regions).	 <p>990 660 330 0</p> <p>0 10 20 30</p> <p>Units</p> <p>Net Price</p>
 <i>Waterfall</i> How the components of a calculated measure affect its make-up	 <p>2.9M -4.4M -12M</p> <p>Recoveries Merch Cost Commissions COGS Discounts Gross Revenue Net Margin</p>

Analysis type	Examples
 <b>Geo</b> Map showing data values and/or change since another date range	
 <b>Gauge</b> A simple visual tool showing performance; single measure	
 <b>Mix</b> 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.