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Salient Dashboards™ Training Guide for Power Viewers

Version 8.3



Limited warranty

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Salient Management Company
203 Colonial Drive, Horseheads, NY 14845
(607) 739-4511
Fax: (607) 739-4045
support@salient.com
www.salient.com

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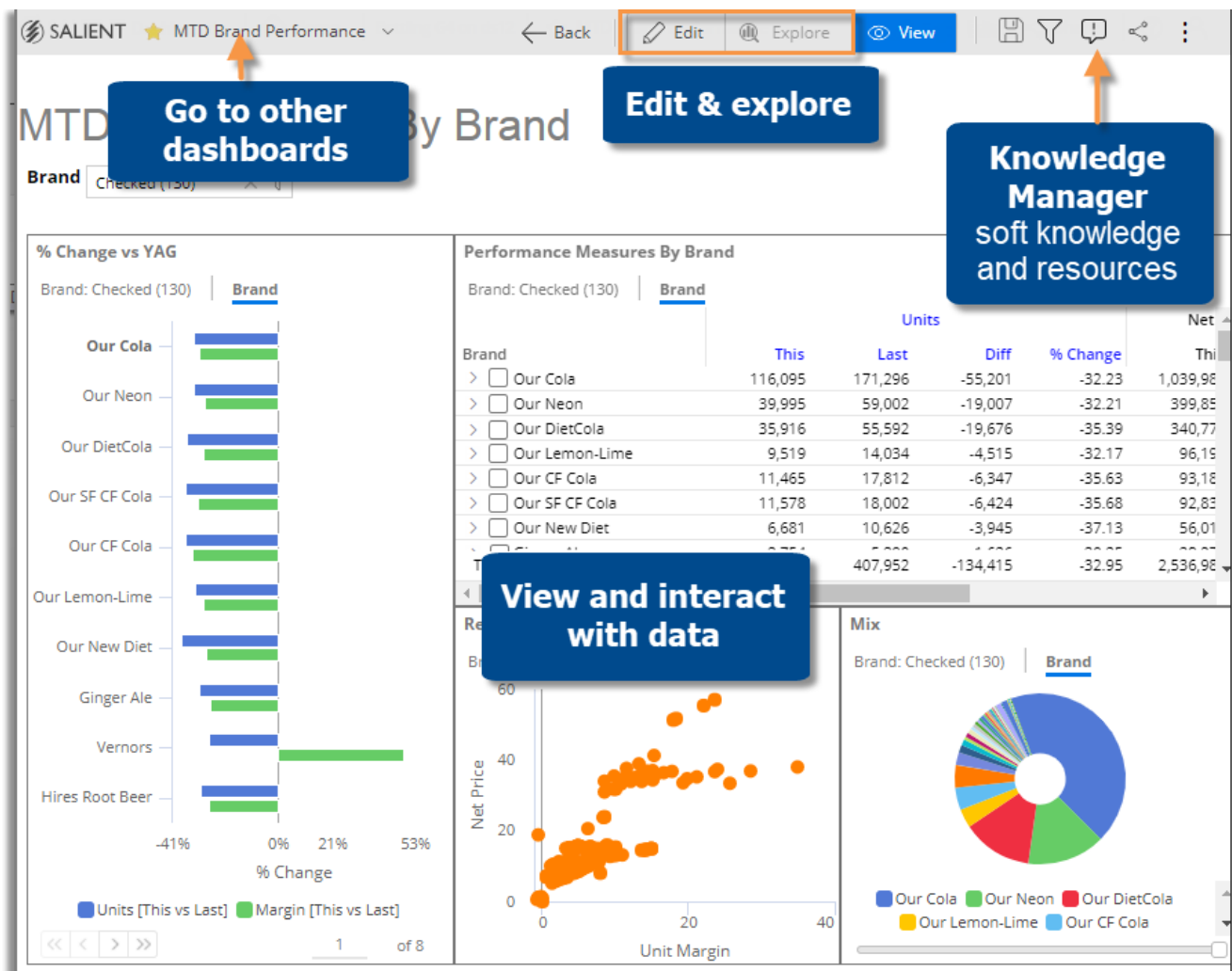
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About Salient Dashboards

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 48). [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.



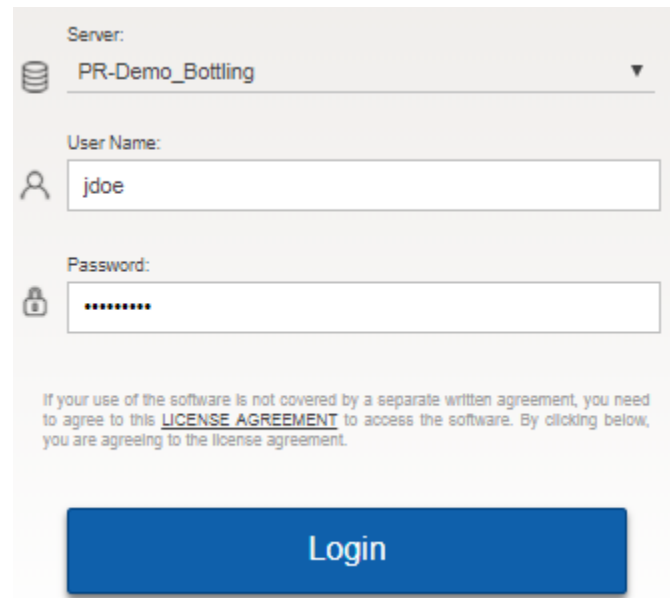
Getting started

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.

To log in


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

The image shows a login form for Salient Dashboards. At the top, there is 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 filled with dots. A small text block below the password field states: 'If your use of the software is not covered by a separate written agreement, you need to agree to this [LICENSE AGREEMENT](#) to access the software. By clicking below, you are agreeing to the license agreement.' At the bottom of the form is a large blue button labeled 'Login'.

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

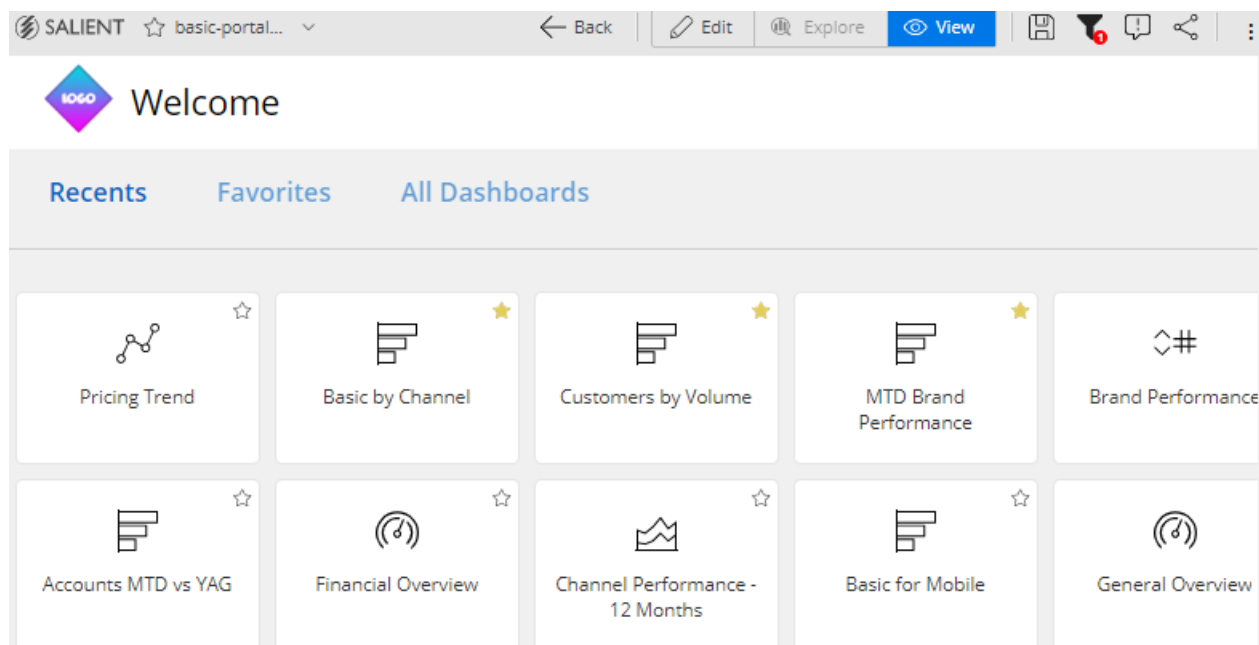
LDAP login (i.e., machine login used for authentication): The user name and password entries may not be needed.

Tips:

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

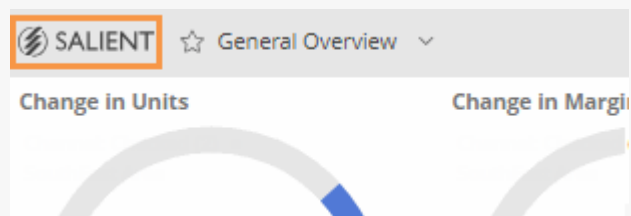
Portal dashboard

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:

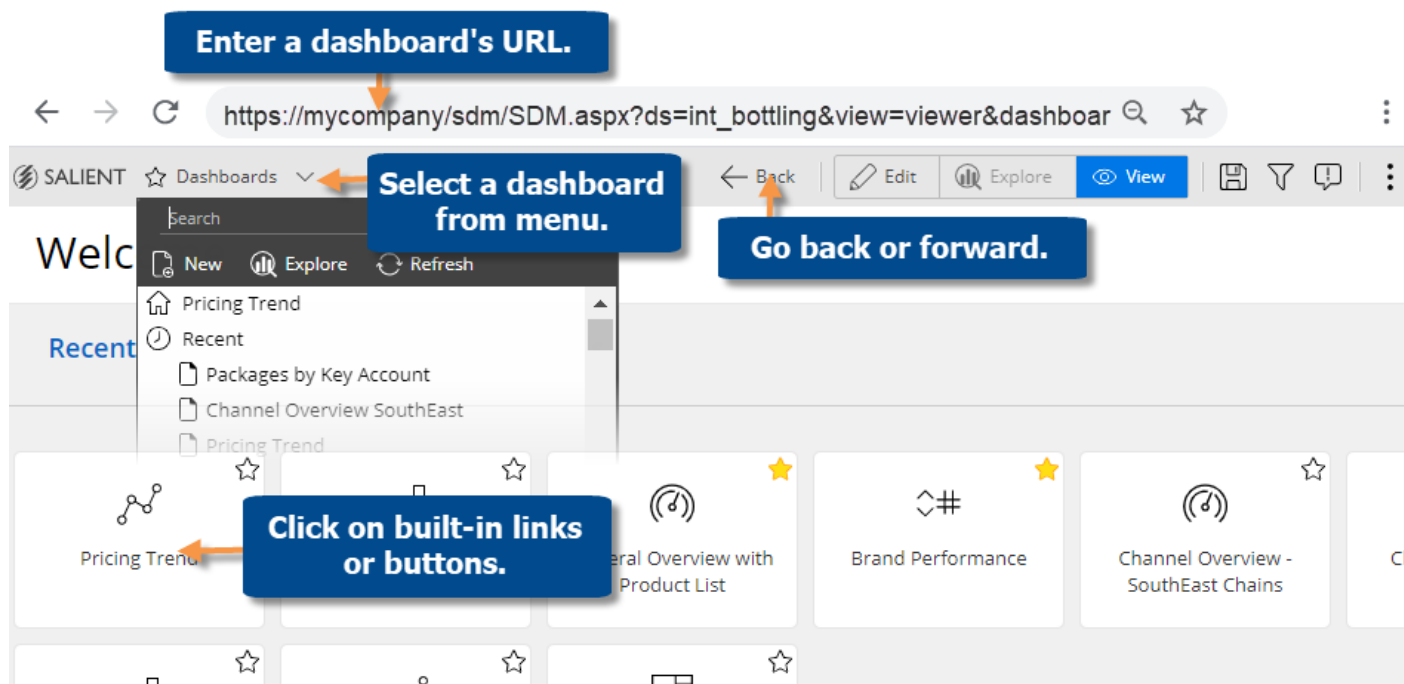
You can go to the portal from any dashboard by clicking **Salient** in the upper-left corner.



User account settings control which dashboards are available.

How to open a dashboard

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



Built-in links

Click on buttons, links, icons, etc., in the portal or other dashboards.

Dashboards menu

Open the dashboards menu at the top of the screen (*keyboard shortcut: o*); then, click on a dashboard name.

URL

Go directly to a specific dashboard by entering its URL or marking it as a favorite in your browser. This may be the dashboard's permanent URL or a temporary URL created by [sharing a dashboard](#) (see page 68).

Back & forward buttons

Go back and forward to dashboards you visited within a Salient Dashboards session. Click the browser's back and forward buttons or use the back button in the dashboard toolbar. Note that the history is cleared when you go to another page.

In the mobile app:

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

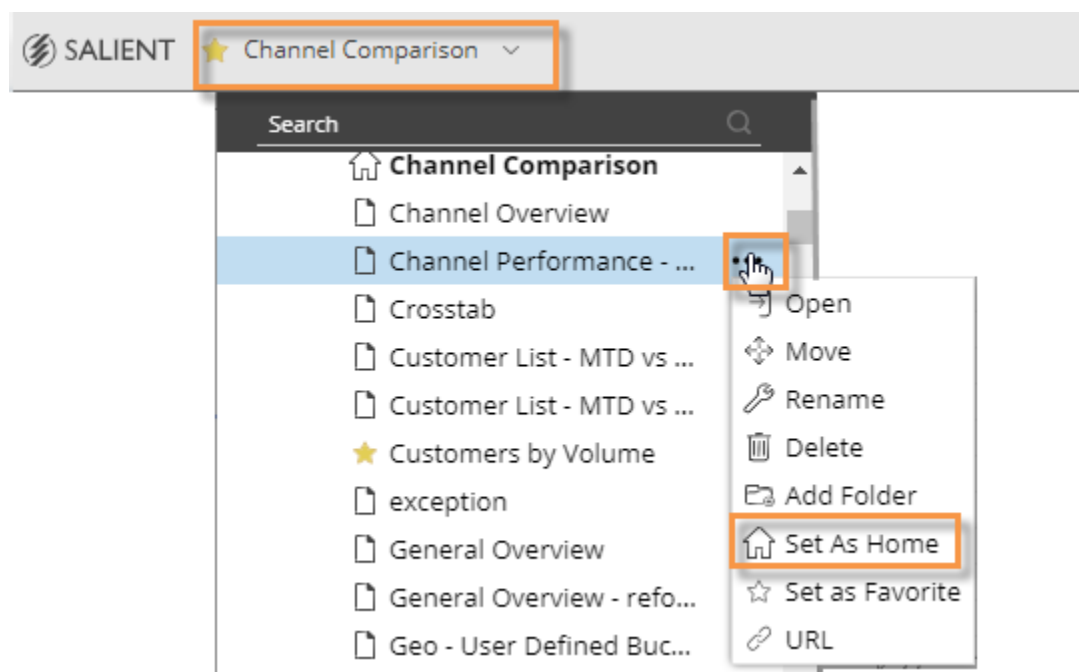


Select the home dashboard

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

To select the home dashboard

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



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

Salient Dashboards screen

Opening a dashboard typically takes you to view mode, where you can interact with the data and navigate to other dashboards. Depending on your user rights, you may be able to go to edit mode where you can edit the dashboard, or further investigate any widget in [explore mode](#) (see page 48).

The screenshot shows the Salient Dashboards interface with several callouts explaining key features:

- Go to portal**: Points to the SALIENT logo.
- Dashboards menu**: Points to the Overview link.
- Mode selection (depends on user rights)**: Points to the View button.
- Help, user preferences, & logout**: Points to the top right toolbar icons.
- Server status**: Points to the green dot icon in the top toolbar.
- Save, filter, Knowledge Manger, & share (additional rights may be required)**: Points to the top right toolbar icons (save, filter, knowledge manager, share).
- Data analysis widgets**: Points to the Gauge widget showing -32.95%.
- Widget buttons (visible on mouseover)**: Points to the buttons on the bottom of the Gauge widget.

The main content area includes a **Comparative** table and a **Trend** chart.

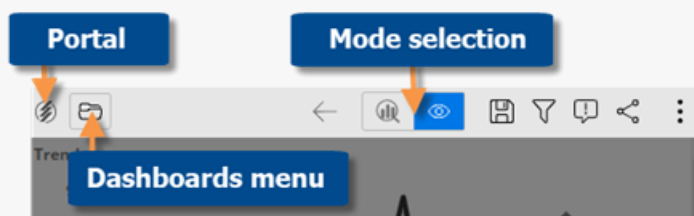
Channel	This ↓	Last	Units
> <input type="checkbox"/> Regional Chains	75,260	115,504	
> <input type="checkbox"/> Conv With Gas	29,393	38,590	
> <input type="checkbox"/> Groceries	23,519	30,926	
> <input type="checkbox"/> Merchandisers	20,109	28,922	
> <input type="checkbox"/> Chains	17,356	22,752	-5,396 -23.72 57,855
> <input type="checkbox"/> Stores	15,651	38,702	-23,051 -59.56 51,818
> <input type="checkbox"/> 2nd Party Operators	15,140	20,040	-13,000 -46.01 60,511
Total (35)	273,537	407,952	-134,415 -32.95 1,241,478

The **Trend** chart shows quantities over time, with a peak around 430k.

Tips:

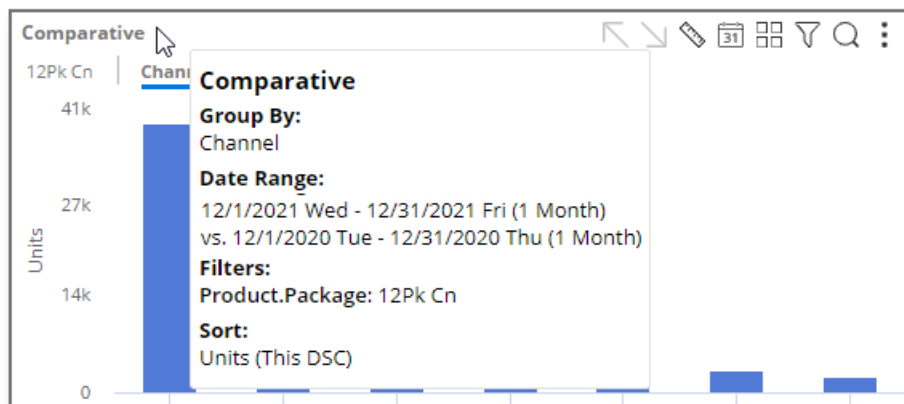
The server status icon appears for a short time after opening a dashboard or when the server status changes (● = active server; ● = suspended server). You can mouseover either of these icons to see when the last data update occurred.

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

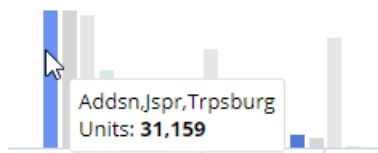


Dashboard tooltips

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.

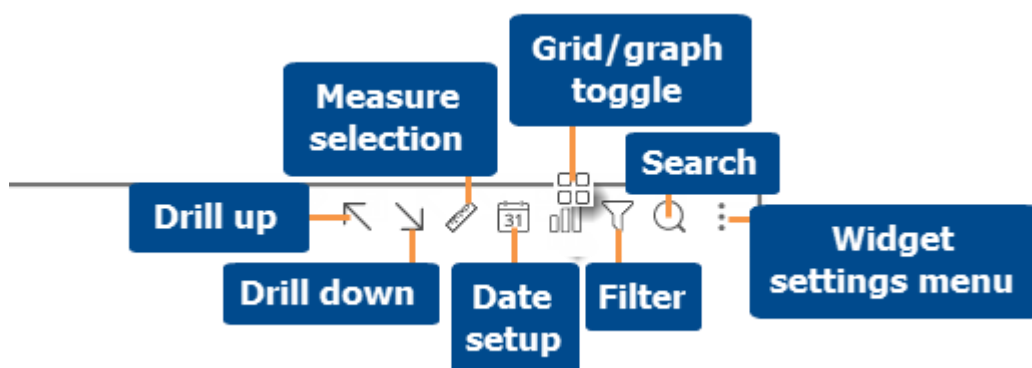


You can also view information about specific items within a widget by placing your cursor over the item. (Some mobile devices may not support mouse-over tooltips.)




Widget buttons

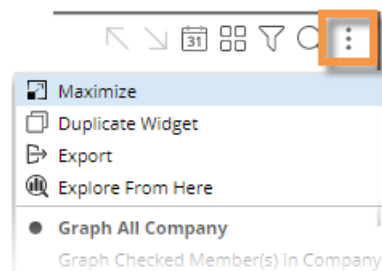
The widget toolbar buttons in the widget's upper-right corner (on mouseover) let you change and interact with the widget.










- Measure selection is only available if the widget includes multiple measures.
- 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:





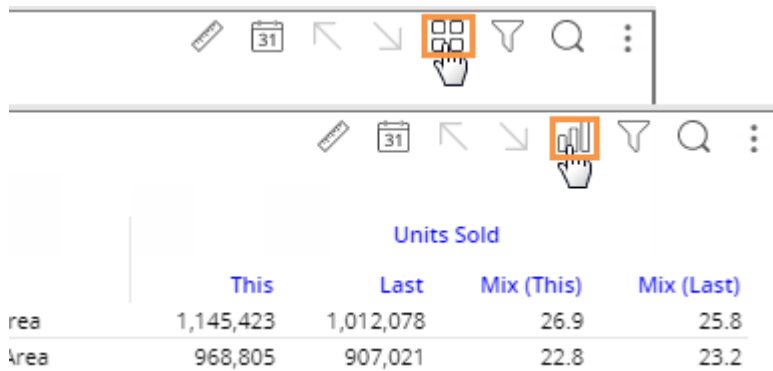
-  Maximize - Enlarges the widget to the maximum extent of the dashboard.
-  Restore Down - Returns a maximized widget to its original size.
-  [Duplicate Widget](#) (see page 57) (not available in view mode) - Create a widget exactly like the original. In explore mode, the widget will be expanded in a new tab.
-  [Export](#) (see page 69) data to UXT, Excel, or CSV (if enabled)
-  Explore From Here - Expand the widget in [explore mode](#) (see page 48), which maximizes the widget and provides capabilities for data analysis and investigation (e.g. change analysis type, add measures, etc.).
-  Notify - Create rules for sending data-based notifications (additional rights required).
- Graph options - Graph all, graph checked, percent change, actual value, etc. (affects graphs only)
- This and Last, This Only, Last Only (affects graphs only)
- Axis Management (for Trend, Comparative, and Multi Comparative graphs)
- Doughnut, Funnel, Pie, Stacked Area, Line, Vertical, Horizontal, etc. (i.e., graph type)
-  - Close Widget (not available in view mode)

Switch between grid and graph formats


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

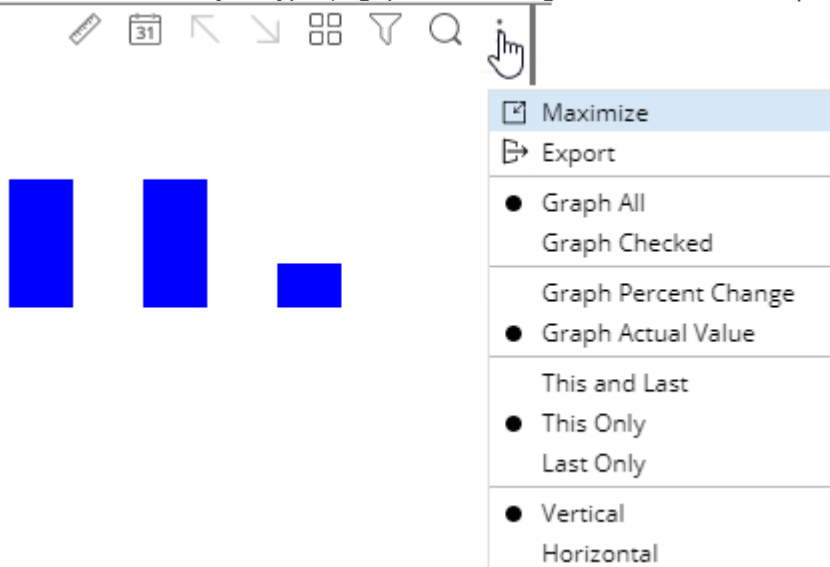
To toggle between a grid and a graph

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.).




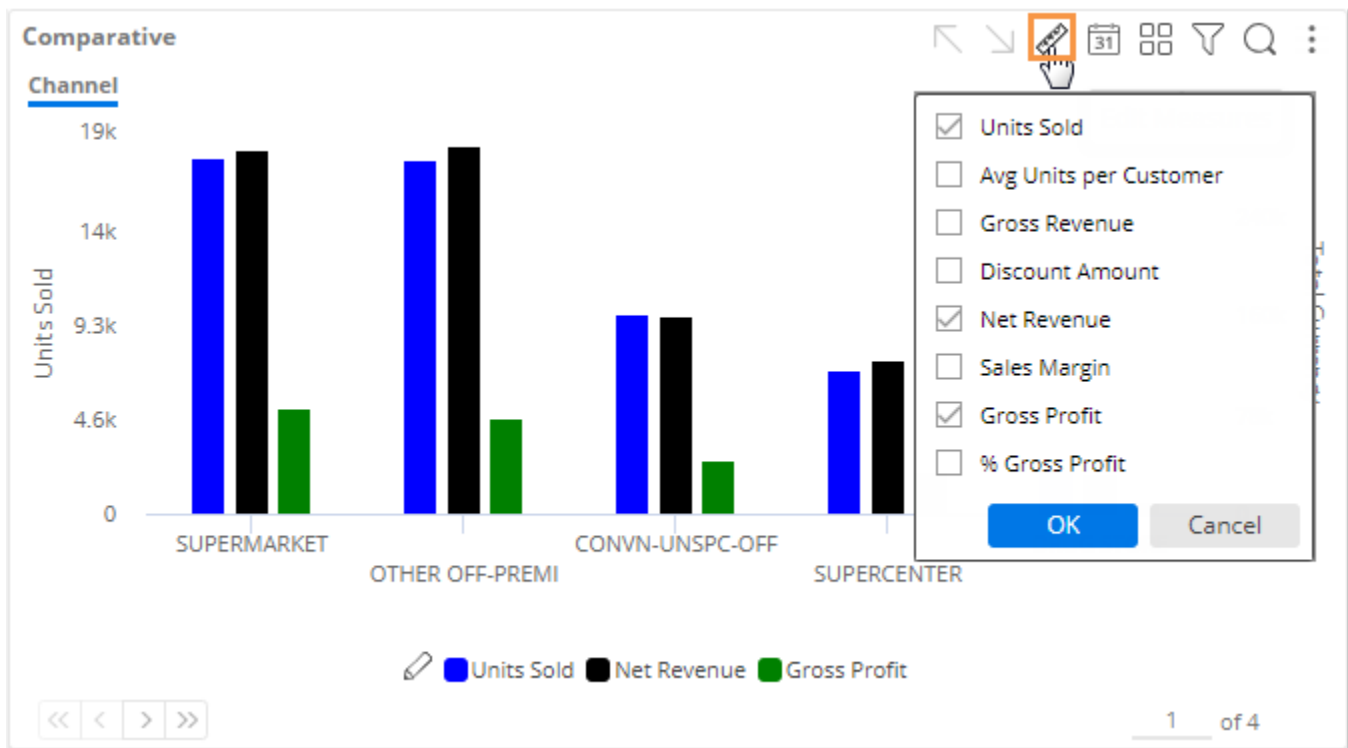
Tip: If the widget uses custom programming (i.e., custom view), the graph/grid button is not available.

Select measures

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

To select measures


1. On the widget title bar, click the  button.
2. In the pop-up window, check the boxes of the measures to show and clear the boxes of the measures to hide. Only measures that have been [added](#) (see page 50) to the widget in during dashboard creation are available. To access a full list of measures, you can go to [explore mode](#) (see page 48).
3. Click OK.



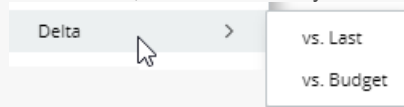
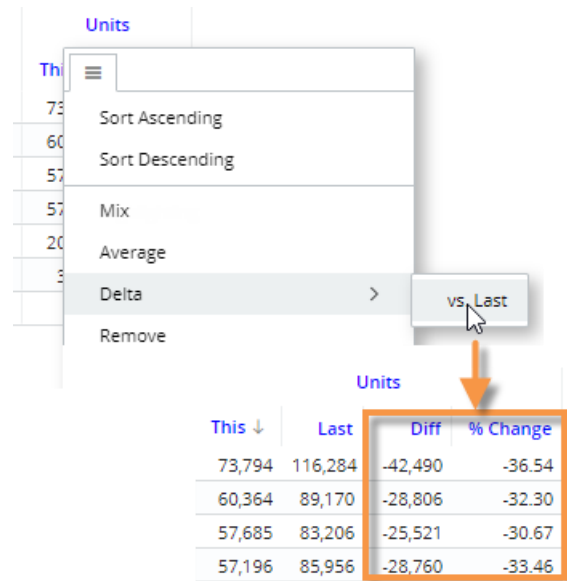
Insert difference and percent change

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

To insert difference and percent change

1. [Switch to the grid](#) (see page 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.





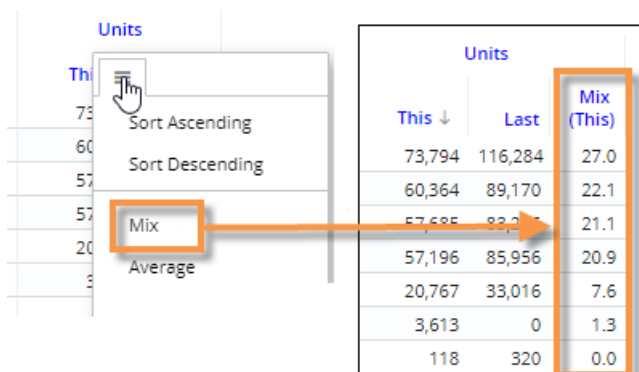
Units			
This ↓	Last	Diff	% Change
73,794	116,284	-42,490	-36.54
60,364	89,170	-28,806	-32.30
57,685	83,206	-25,521	-30.67
57,196	85,956	-28,760	-33.46

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.




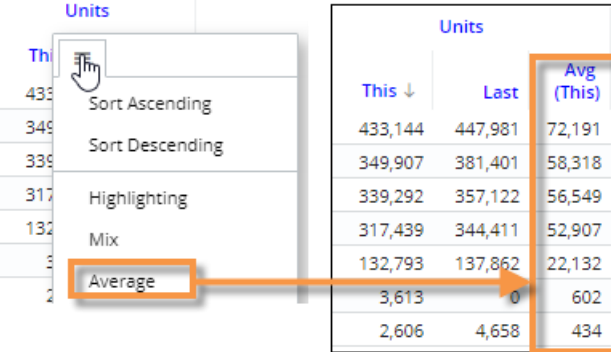
Units		
This ↓	Last	Mix (This)
73,794	116,284	27.0
60,364	89,170	22.1
57,685	83,206	21.1
57,196	85,956	20.9
20,767	33,016	7.6
3,613	0	1.3
118	320	0.0

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**.




Units		
This ↓	Last	Avg (This)
433,144	447,981	72,191
349,907	381,401	58,318
339,292	357,122	56,549
317,439	344,411	52,907
132,793	137,862	22,132
3,613	0	602
2,606	4,658	434

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.

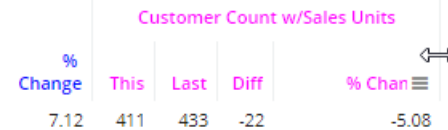


Units		Net Revenue		Margin	
This ↓	Last	This	Last	This	Last
73,794	116,284	66,972	1,055,429	32,384	497,780
60,364	89,170	53,324	809,507	26,234	391,334
57,685	83,206	50,061	753,924	24,646	363,452

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	

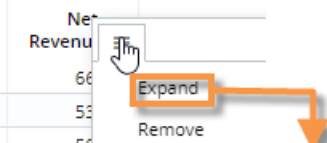
Expand a calculated measure

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.



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.


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

	This	Last
Units	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

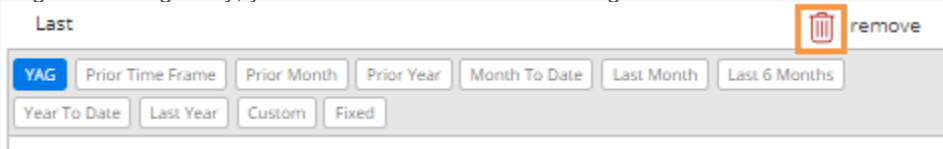


1. Click the date setup icon  in the title bar of the widget.
2. In the dialog, choose from the following date settings. The available options depend on the dataset and may be pre-configured by your administrator.

Units Sold	
This	Last
168,646	247,354


The screenshot shows a date selection dialog with the following components and annotations:

- Resolution:** A dropdown menu set to "Month". An arrow points to it from a blue box labeled "Resolution".
- Day filters:** A dropdown menu set to "Sunday". An arrow points to it from a blue box labeled "Day filters".
- Day Filters:** A button to the right of the "Day filters" dropdown.
- Main date range (This):** A blue box with an arrow pointing to the "This" section. This section includes:
 - Buttons: "Month To Date", "Last Month", "Last 6 Months", "Year To Date", "Last Year", "Custom", "Fixed".
 - Start date: "01/01/2011" with a calendar icon.
 - End date: "01/31/2011" with a calendar icon.
 - A range slider and a "1" with up/down arrows.
 - A checkbox labeled "Most Recent Complete".
- Previous date range (Last):** A blue box with an arrow pointing to the "Last" section. This section includes:
 - Buttons: "YAG", "Prior Time Frame", "Prior Month", "Prior Year", "Month To Date", "Last Month", "Last 6 Months", "Year To Date", "Last Year", "Custom", "Fixed".
 - Start date: "01/01/2010" with a calendar icon.
 - End date: "01/21/2010" with a calendar icon.
 - A range slider and a "1" with up/down arrows.
- Comparison:** A dropdown menu set to "Matching time frames". An arrow points to it from a blue box labeled "Comparison for incomplete timeframes".
- Reset:** A button with a link icon. An arrow points to it from a blue box labeled "Reset to saved date range (view mode only)".
- Link/unlink widget's date range:** A blue box with an arrow pointing to the link icon on the "Reset" button.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

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.


Option	Explanation
Main date range (This)	Under This , click the button of the date range to view (e.g. Month To Date). The available date presets depend on the resolution selected above and the dataset configuration. If you wish, you can customize the date range further after making your selection.
Day filters (optional)	Optionally, click the Day Filters button at the top of the dialog to choose specific days of the week or business days within the date range to analyze. Data for all other dates will be filtered out.
Comparison date range (Last) - optional	<p>Under Last, 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 Add Date Range at the bottom of the dialog to include a previous date range if desired.</p> <p>Tip: A comparison date range is optional in many widget types. If you want to look at a single date range only, you can remove the Last date range.</p> 
Comparison for incomplete timeframes	<p>A Comparison 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"> • Matching time frames - Adjust the number of days in Last date range to match the number of days in This date range for a precise view of gain/loss (i.e. how much better/worse are we doing). For example, compare March 1 through 15 of this year with March 1 through 15 last year. • Complete last period - Do not adjust the number of days in Last date range; instead show the complete last month or period for a gap or goal perspective (i.e. how much more to go). For example, compare March through 15 of this year with the full month of March last year.
Linked dates (i.e., use dashboard date)	<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:

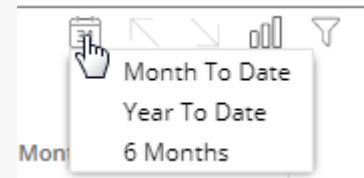
In view mode, you can click the  button to revert the date range back to the last saved settings.

Tips:

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.



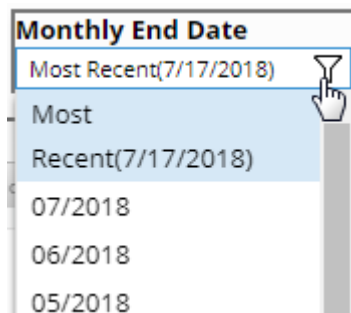
End date selection

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.

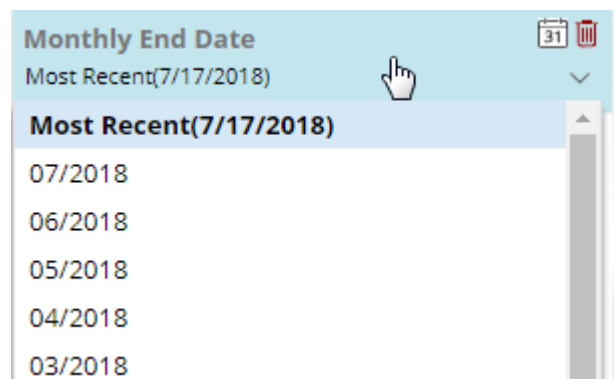
To select the dashboard end date

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 22).
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:

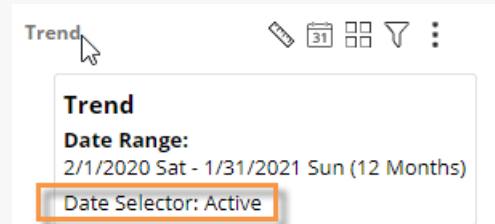
**Tips:**

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.

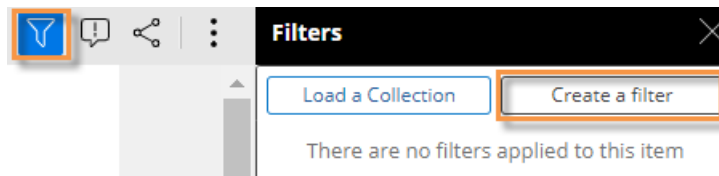
Tips:

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




To add a date selector to the filters panel

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



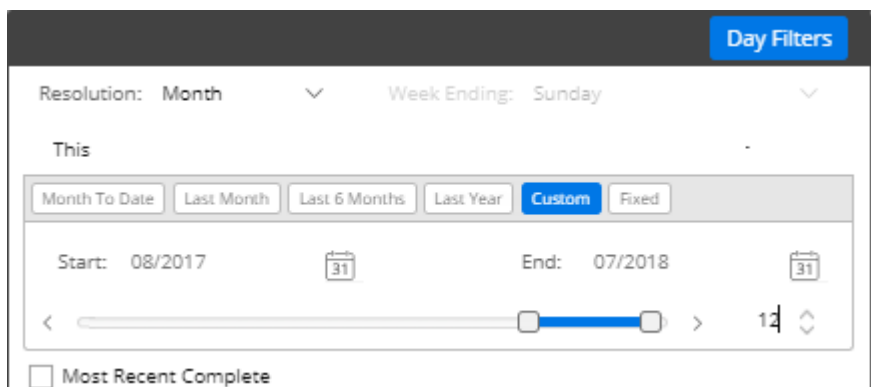
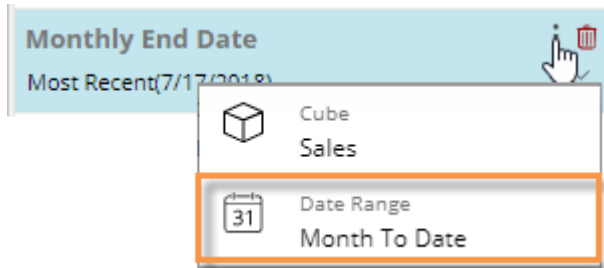
4. Set the dates that will appear as choices in the menu.

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

- ii. Click on Date Range.


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

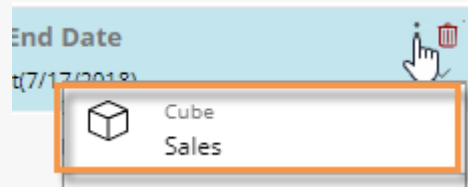
- iii. Configure the date range so that it includes all of dates that should appear as choices in the menu. The dates can be fixed or move automatically based on available data. For example, you might want to allow users to select from the last twelve months.



Tips:

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

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



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

Group By attributes

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

1st By

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

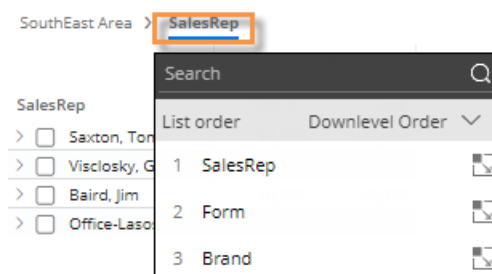
Region	Units ↓	Net Revenue
> <input type="checkbox"/> SouthEast Area	69,324	622,179
> <input type="checkbox"/> SouthWest Area	65,067	553,981
✓ <input type="checkbox"/> East Area	58,896	464,027
> Gordon, Pat	20,528	162,706
✓ Turner, Michael	16,552	106,542
> Cans	10,939	61,933
✓ PET	5,480	43,493
Our Cola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

Criteria for Group By selection in view mode

- The widget must compare members.
- The widget must have multiple Group By attributes that were built in during dashboard creation. Only these attributes will be available for selection in view mode.
- The breadcrumb path must be not be disabled.

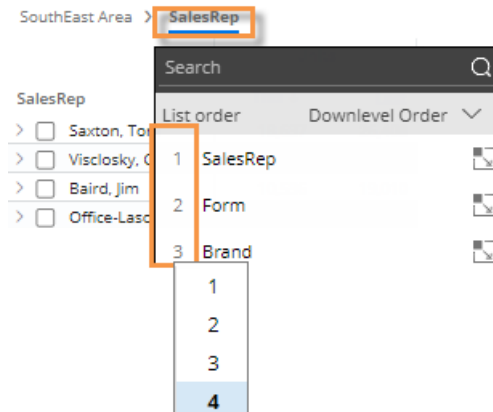
To change the By

1. Click the By in the breadcrumb path (underlined).
2. In the pop-up dialog, click the name of the dimension by which to group the data. To search for a dimension, enter the first few characters at the top of the dialog.




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

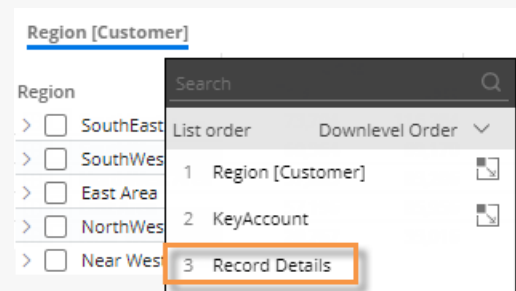
1. Click the By in the breadcrumb path (underlined).
2. In the pop-up menu, click on a number and select from the drop-down to adjust the drill order, or click and drag to place attributes in the desired order.
3. Click **OK**



Tips:

In the pop-up menu, 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 26); [flat view grid](#) (see page 28); or [expanded graph formats](#) (see page 29).

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



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

To access dimensions beyond those that were built into the dashboard, go to [explore mode](#) (see page 48).

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).

		Units		
Region		This ↓	Last	% Change
> <input type="checkbox"/> SouthEast Area	1st By	69,324	64,719	7.12
▼ <input type="checkbox"/> SouthWest Area		65,067	60,886	6.87
> Stark, Solomon	2nd By	9,527	18,909	3.27
> Davis, John		5,840	15,009	5.54
▼ Keller, Brad		11,730	9,842	19.18
> S.Newburg Dist-Nor	3rd By	4,571	4,571	29.88
> Obeck Inc. North		3,032	3,032	2.97
▼ Variety Gifts		1,403	1,434	-2.16
Our Cola	4th By	705	817	-13.71
Our DietCola		128	128	49.22
Our Neon		105	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.

		Units	
Region		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

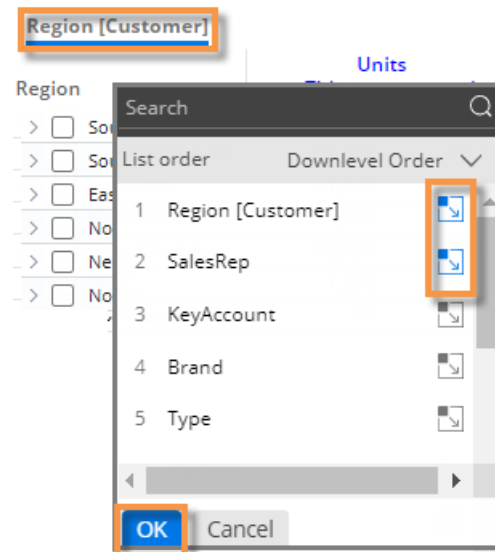
To auto-expand all members of a dimension or key

(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 34) 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.

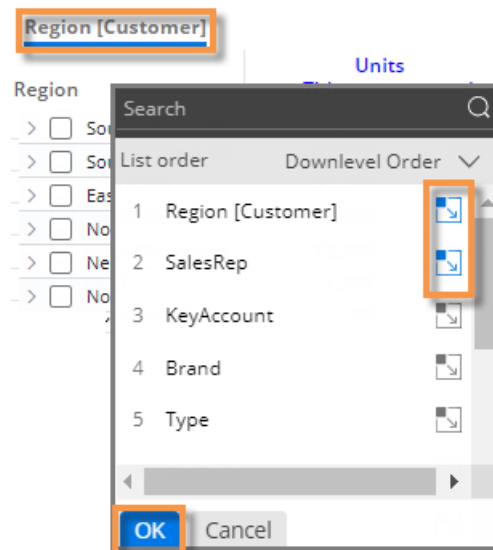
1st By

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 59) 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.


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

Auto-expansion in graphs

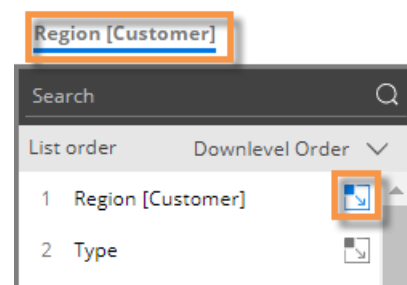
In the following graphs, dimensions and keys can be expanded to see granular results.

- Comparative and Multi Comparative graphs (see below) - visualize performance of subgroupings of dimensions/keys.
- [Mix graphs](#) (see page 30) - 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 24) 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.

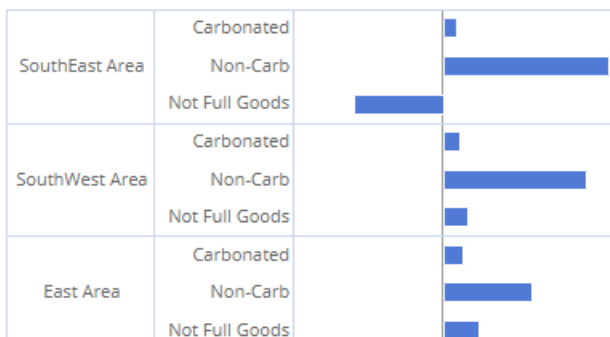
If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.



The data layout depends on the underlying [grid type](#) (see page 59), 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

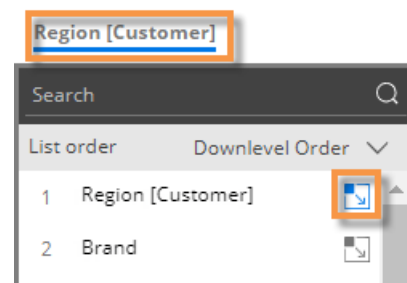
This graph has separate bars at the same level for each unique combination. Bars can be sorted independently of the parent level.



Expand data in Mix graphs

1. Go to a Mix graph.
2. In the [Group By menu](#) (see page 24) 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.



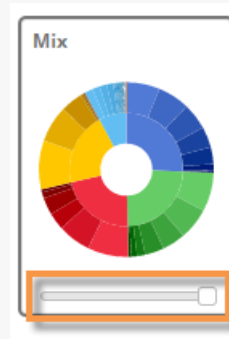
The data layout depends on the underlying [grid type](#) (see page 59), which can be changed in explore mode:

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) .

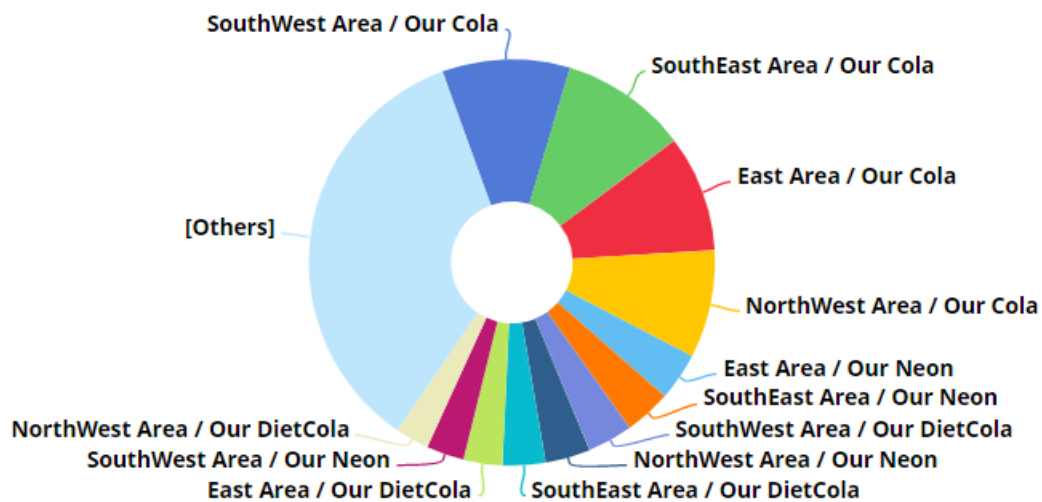


Tip: For a sunburst, we recommend setting the **Graph Page Size** to a large number; otherwise, the pie may only show a subset of the data. To set the graph page size, use the slider at the bottom of the graph (i.e., drag the slider all the way to the right).



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

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

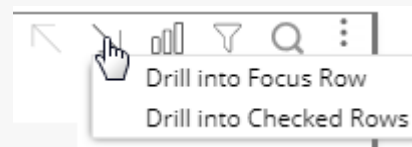
> <input type="checkbox"/>	SouthEast Area	73,794
> <input checked="" type="checkbox"/>	SouthWest Area	60,364
> <input type="checkbox"/>	NorthWest Area	57,685
> <input type="checkbox"/>	East Area	57,196

Tips:

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.

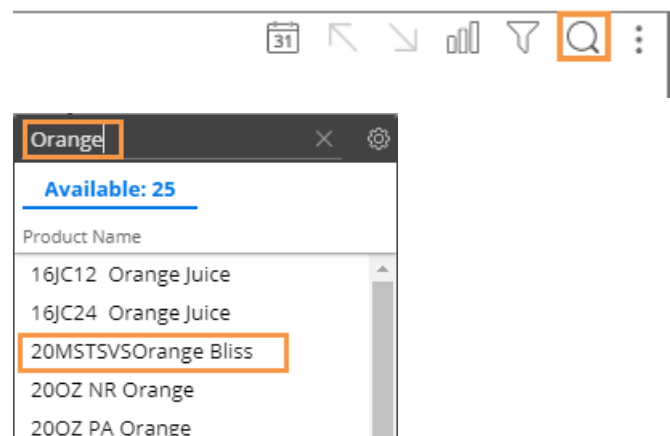


Search

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.



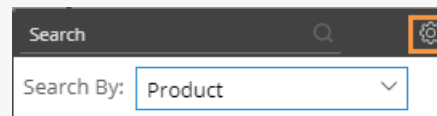
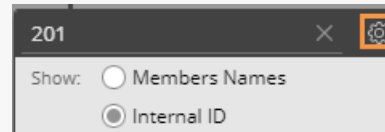
Tips:

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 to bring the most important data to the top of the view.

To sort

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	% Chg	
116,284	-42,490	-36.13	☰
89,170	-28,806	-32.31	
83,206	-25,521	-30.65	

Sort Ascending
 Sort Descending

Tips:

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

% Change	
-63.13	
-37.10	
-36.54	

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.

Region		
<input type="checkbox"/>	Near West Area	☰
<input type="checkbox"/>	NorthEast Area	
<input type="checkbox"/>	SouthEast Area	
<input type="checkbox"/>	East Area	
<input type="checkbox"/>	SouthWest Area	

Sort Ascending
 Sort Descending
 Sort Host Code Ascending
 Sort Host Code Descending

Filter

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

The screenshot shows a dashboard with two main widgets: a table and a bar chart. Annotations point to different filter types:

- Filter widget:** Points to the 'Status (Customer)' dropdown menu.
- Filter button:** Points to the 'SouthEast' button.
- Workspace filters:** Points to the 'Workspace Filters' panel on the right, which includes 'Status (Customer)' and 'Brand (Product)'.
- Global filter:** Points to the 'Region' filter in the 'Workspace Filters' panel.
- Downlevel filter:** Points to the 'Regional Chains' breadcrumb in the table widget.
- Individual widget filters:** Points to the 'Baird, Jim' filter in the bar chart widget.

SalesRep	This	Last	Diff	% Change
> Johnson, Louise				-25.37
> Baird, Jim				-44.09
> Keller, Brad	2,790	4,786	-1,996	-41.70
> Stark, Solomon	2,752	3,762	-1,010	-26.85
> English, John	2,666	4,366	-1,700	-38.94
Total (14)	33,212	50,114	-16,902	-33.73

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 dashboard with a table widget. The breadcrumb path at the top is: NY | BEST BEER FAMILY | 30 PACK CANS | BEST BEER LT | BRET BURTON > SUPERMARKET > Customer Name. Annotations point to different filter types:

- Workspace filters (including global filters and filter widgets):** Points to the 'Customer Name' filter in the breadcrumb path.
- Individual widget filters:** Points to the '30 PACK CANS' filter in the breadcrumb path.
- Downlevel filters:** Points to the 'BRET BURTON > SUPERMARKET' filter in the breadcrumb path.
- Group By (in widgets that compare members):** Points to the 'Customer Name' filter in the breadcrumb path.



Customer Name	Units Sold
1383	286
234	26



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

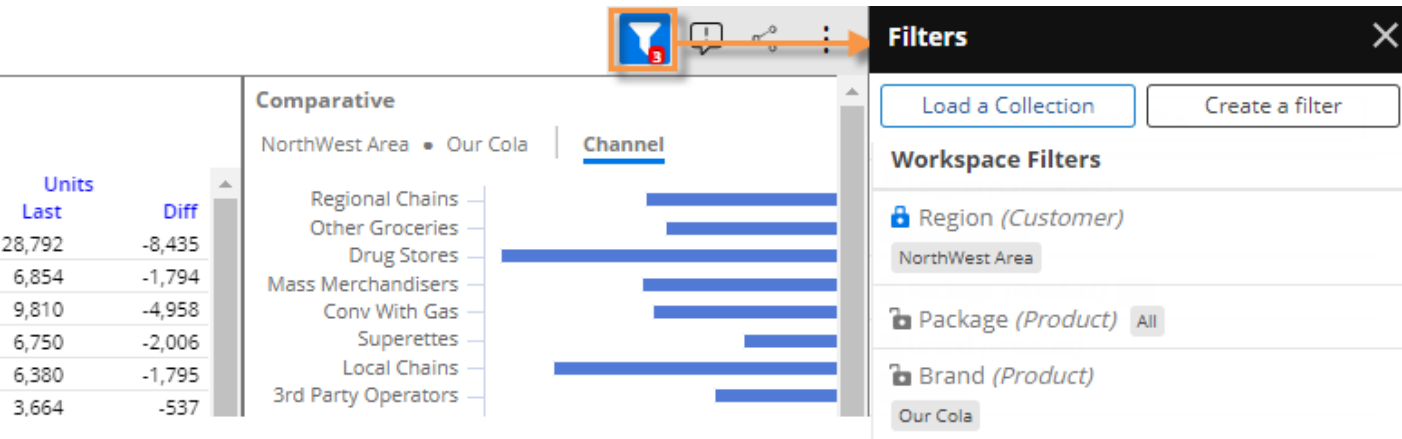
Workspace filters

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

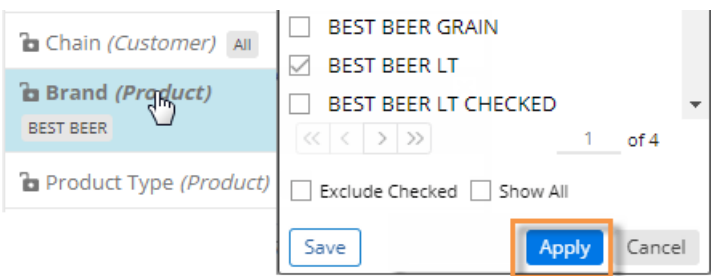

To use workspace filters




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

Tip: A contrasting symbol  or  means that at least one [global filter](#) (see page 39) is turned on.




In the filter panel, choose from existing workspace filters or [create a new workspace filter](#) (see page 37).

Option	Instructions
Make a filter selection (e.g., select a different member)	<div>Click on the workspace filter and make your selections in the pop-up window. Click Apply.</div> <div></div> <div>Tips:<ul style="list-style-type: none">• By default, the window only shows members with data in the current context. You can click Show All in the dialog to list all members.• You can import a file (see page 44) to quickly filter on a list of members. Click  at the top of the pop-up window to access this option.</div>

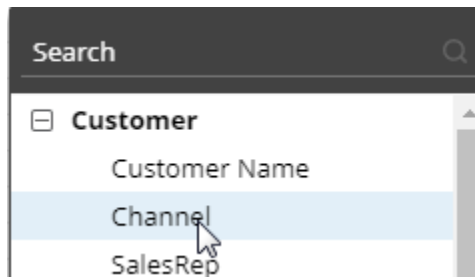
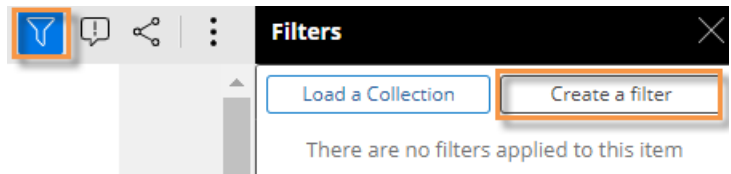
Option	Instructions
Reset a filter	Place the cursor over the filter and click the X button. The filter will still be present but will show data for all members. 
Remove a filter	Reset the filter as explained above. Then, place the cursor over the filter and click the  button. 

To create a workspace filter

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

You can also **Load a Collection** to filter based on a saved [collection of members](#) (see page 42).


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



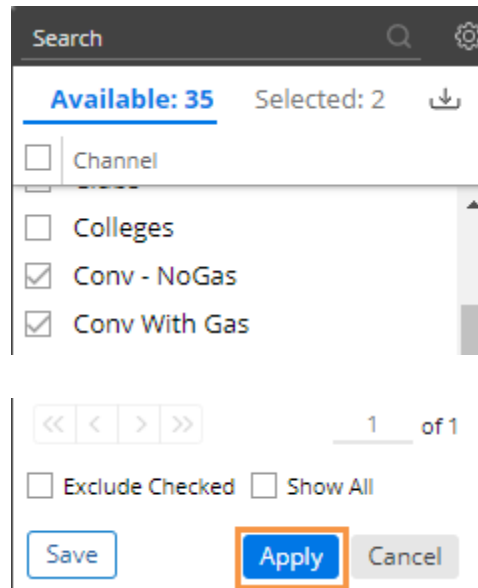
To create a workspace filter

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

Tips:

- The **Exclude Checked** option lets you show data for all members except the selected members.
- You can [import a file](#) (see page 44) 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.

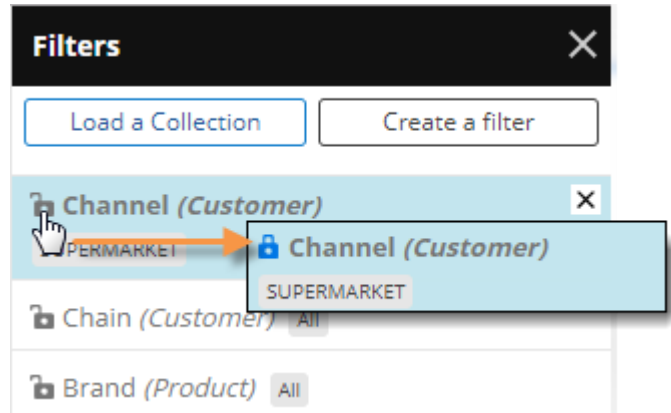
To turn on a global filter

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

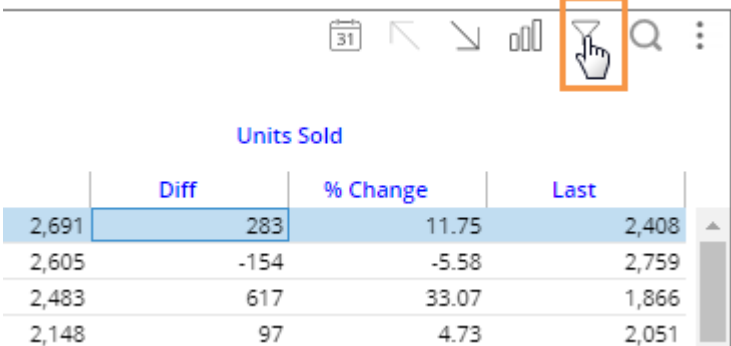


Individual widget filters

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

To create a widget filter

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



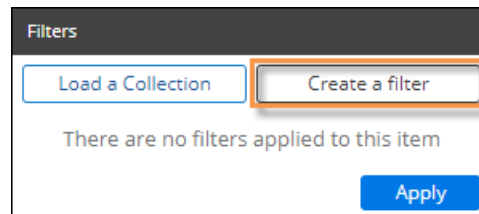
	Diff	% Change	Last
2,691	283	11.75	2,408
2,605	-154	-5.58	2,759
2,483	617	33.07	1,866
2,148	97	4.73	2,051

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

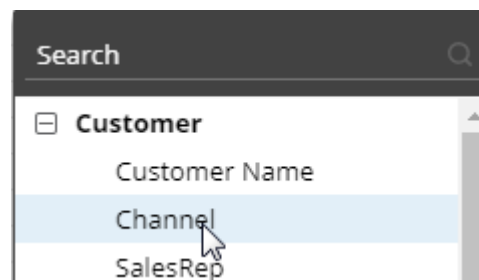
Other options may be available:

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

Load a Collection - You can filter on a saved [collection of members](#) (see page 42).




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

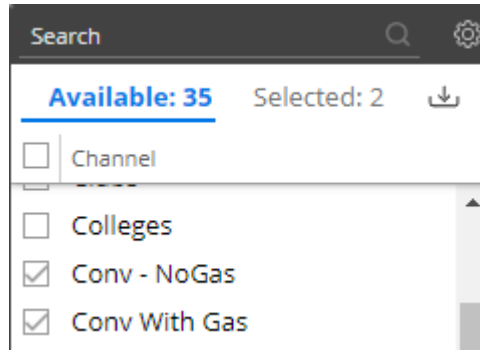


To create a widget filter

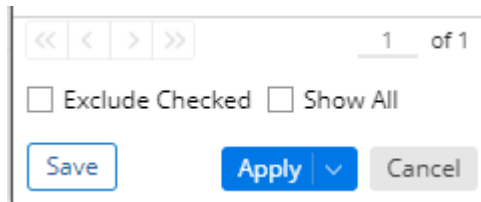
4. Checkmark the desired member(s).

Tips:

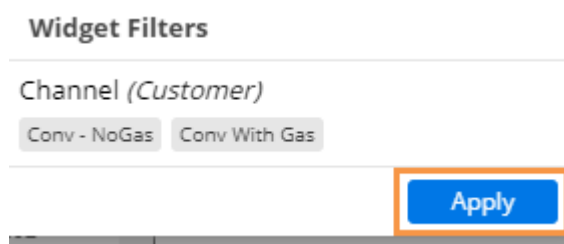
- By default, the filter choices only include members with data in the current context. If you wish, you can check **Show All** to list all members.
- The **Exclude Checked** option lets you show data for all members except the selected members.
- You can [import a file](#) (see page 44) to quickly select 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** to apply the filter to the selected widget only.



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

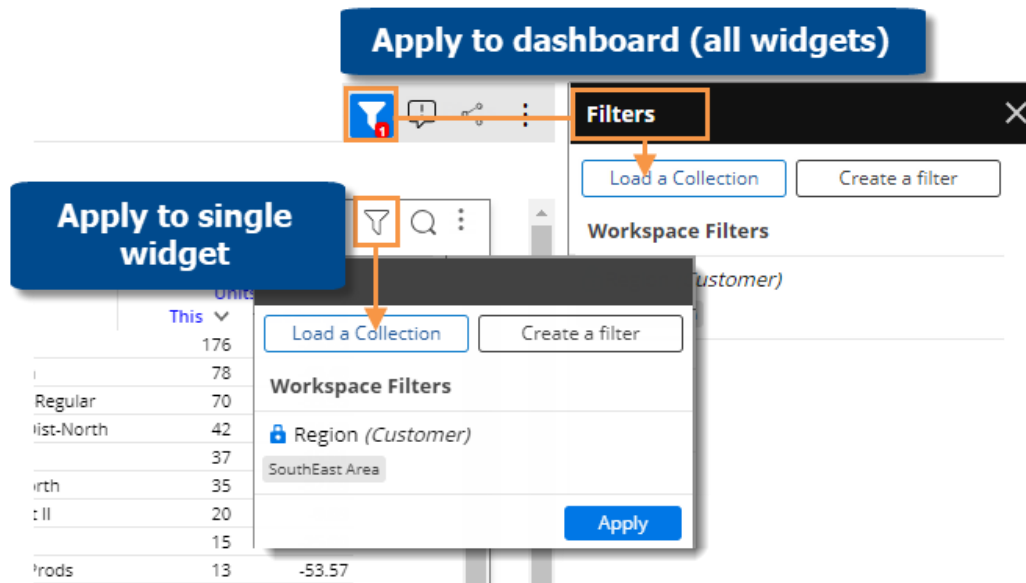


Filter data by a collection

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

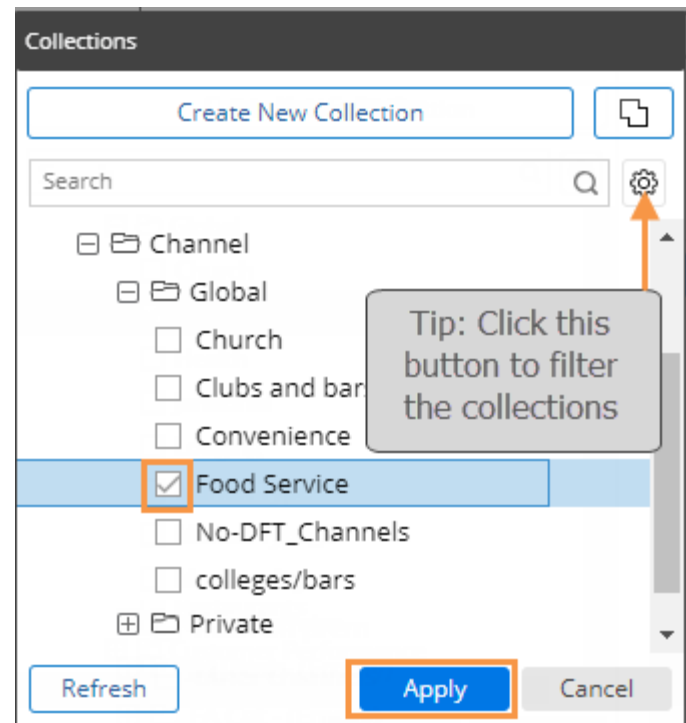
1. Do one of the following to open the filters area:
 - To apply a collection to a single widget, click the filter button at the top of the widget (visible on mouseover).
 - To apply a collection to the entire dashboard, click the Filters button to open the Filters panel.
2. Click **Load a Collection**.



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


Tips:

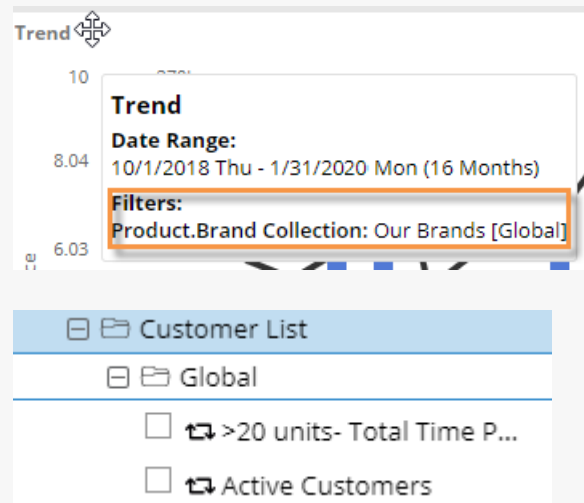
- If you select more than one collection within the same key or dimension, results will be limited to members that are common to all selected collections.
- The  button lets you merge multiple collections into a single new collection.



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.

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




Import filters

The following methods let you quickly import filters instead of creating them from scratch:

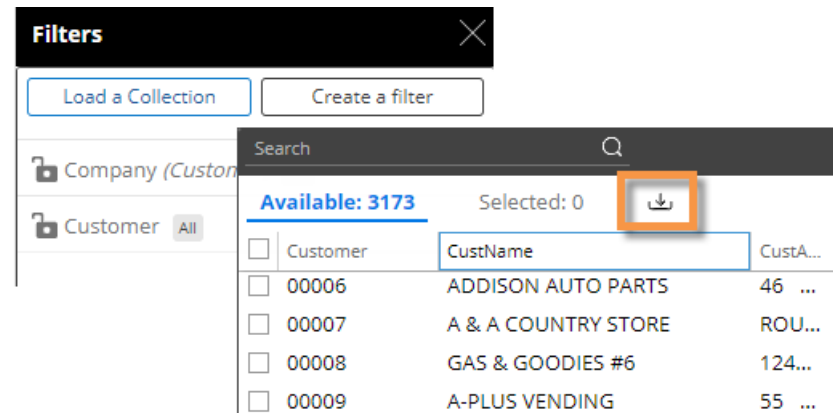
- [Import options, including filters, from other dashboards](#) (see page 66). This option is not available for filter widgets.
- Import a text file (i.e., local collection) to quickly select members for a filter as explained below. This method works for several types of filters, including workspace 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.

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.

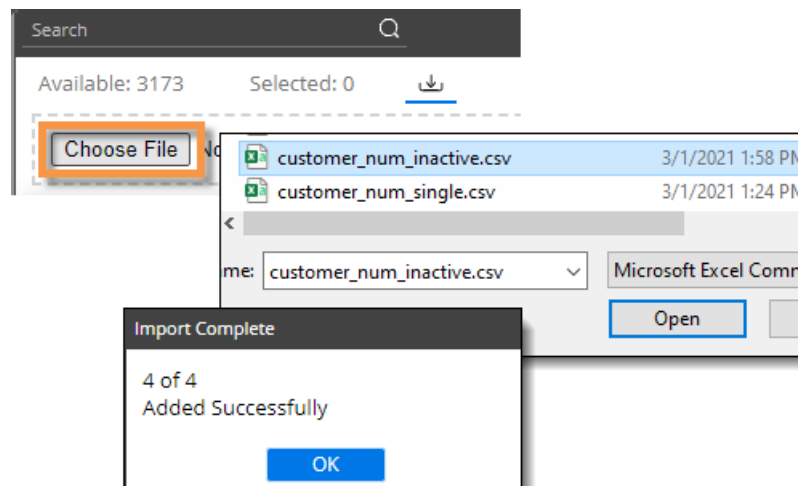
Example CSV file

```
91857
11904
11880
00000
```



4. Choose the file and click Open.

Salient Dashboards will show a summary of the members imported.



5. Click **Apply**.


Drill down (i.e., downlevel filters)

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

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

To drill down on a single member


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

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

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	14,230	10,732

Double-click to drill

To drill down on multiple members


1. [Check the desired members](#) (see page 32) in a grid.
2. Click  on the title bar at the top of the widget.
3. If a drop-down appears, select **Drill into Checked Rows**.

Comparative			Units	
Channel			Units	
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 24) 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.

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

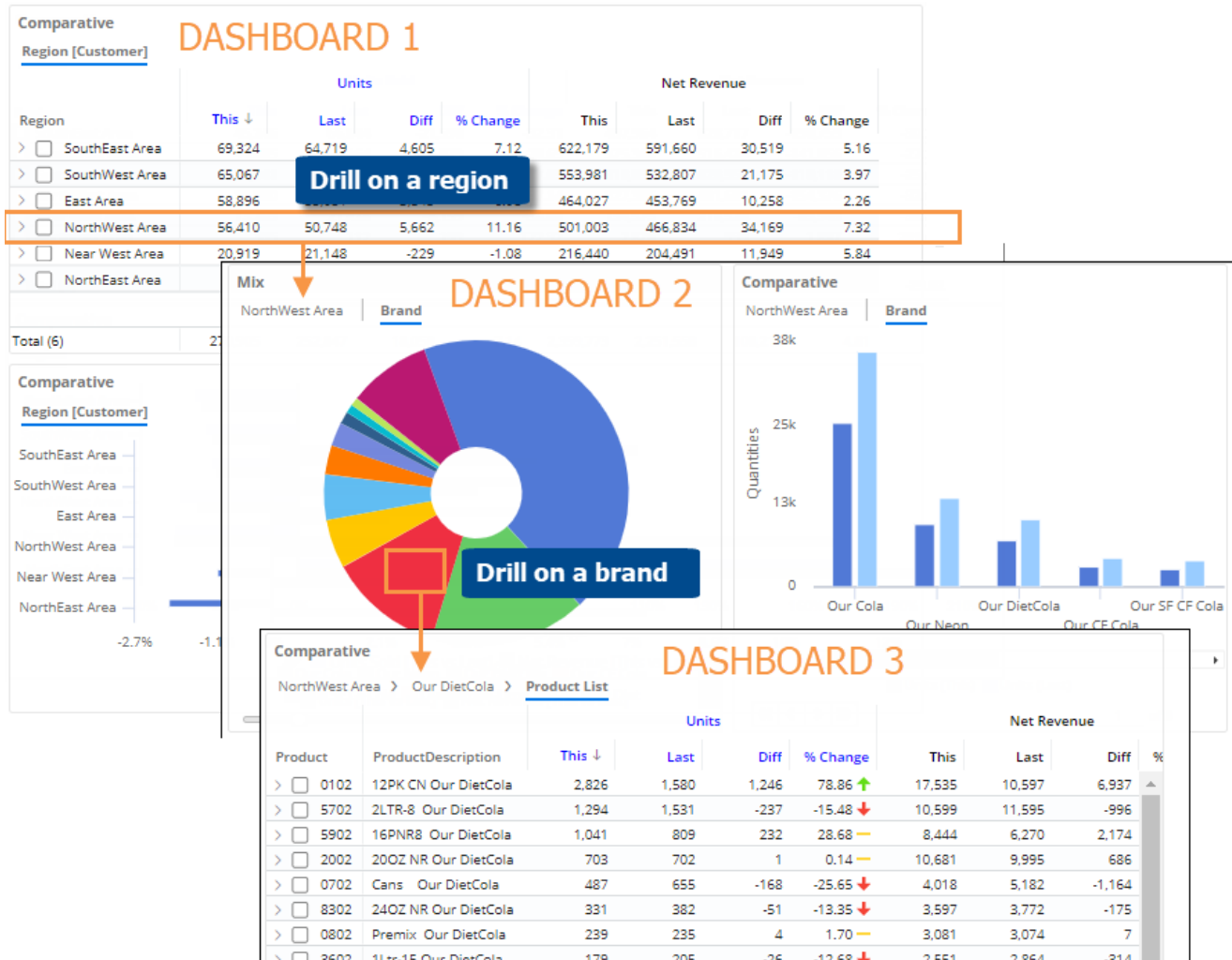
If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

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 46). The custom drill path can include a variety of widget types and display settings to optimize the investigative process while allowing the user to select the item(s) on which to drill.

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



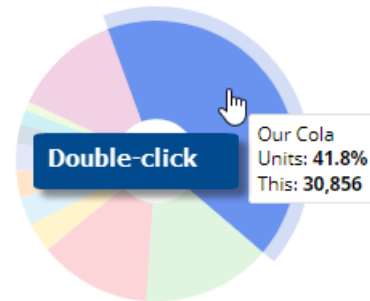
To use a custom drill-down

1. [Open the first dashboard](#) (see page 8) in the custom drill-down.
2. Select the item(s) and drill by [double-clicking or using other drill methods](#) (see page 45).

Comparative		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		58,896	55,051	3,845
> <input type="checkbox"/> NorthWest Area		56,410	50,748	5,662
> <input type="checkbox"/> Near West Area		20,919	21,148	-229


To use a custom drill-down

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

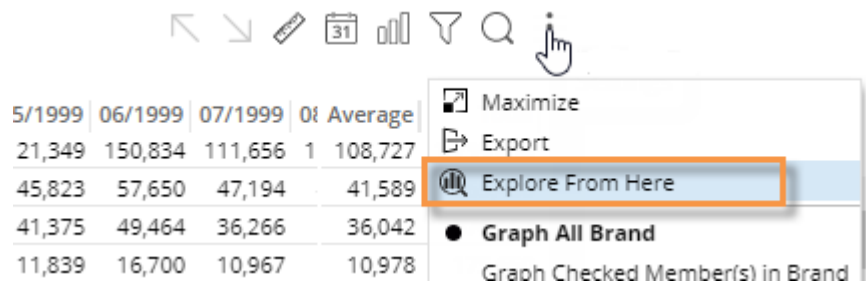
Explore mode provides additional capabilities for data investigation beyond those available in view mode. Users can change the analysis type, group the data by another attribute (any available in the dataset), add measures besides those that were built into the dashboard, and more. Explore mode does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

To start exploring from a widget

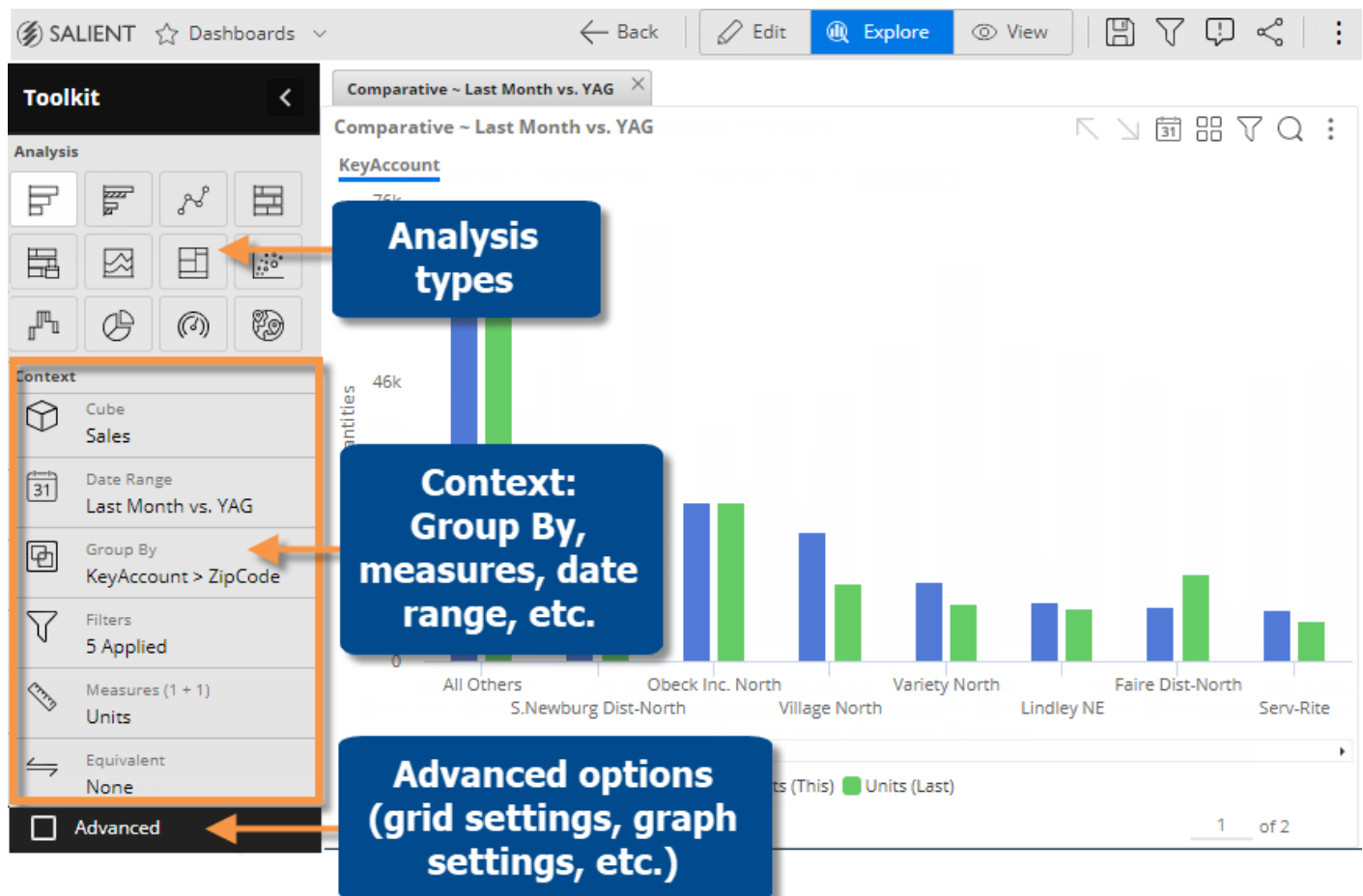
When viewing a dashboard, you can expand any of its widgets in explore mode to dig deeper into the data.

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 Explore mode interface. The interface shows a dashboard titled "Comparative ~ Last Month vs. YAG" with a bar chart. On the left is a "Toolkit" panel with sections for Analysis, Context, and Advanced options. Annotations with arrows point to specific parts of the interface:

- Analysis types**: Points to the Analysis section of the Toolkit.
- Context: Group By, measures, date range, etc.**: Points to the Context section of the Toolkit.
- Advanced options (grid settings, graph settings, etc.)**: Points to the Advanced section of the Toolkit.

The Toolkit panel includes the following sections:

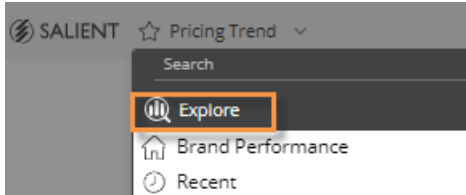
- Analysis**: Contains icons for various analysis types.
- Context**: Includes a Cube (Sales), Date Range (Last Month vs. YAG), Group By (KeyAccount > ZipCode), Filters (5 Applied), Measures (1 + 1), Units, and Equivalent (None).
- Advanced**: Includes a checkbox for "Advanced".

The main dashboard area shows a bar chart titled "Comparative ~ Last Month vs. YAG" with the following data series:

Category	Units (This)	Units (Last)
All Others	~46k	~46k
S.Newburg Dist-North	~46k	~46k
Obeck Inc. North	~46k	~46k
Village North	~46k	~46k
Variety North	~46k	~46k
Lindley NE	~46k	~46k
Faire Dist-North	~46k	~46k
Serv-Rite	~46k	~46k

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 49).
- [Add any measures](#) (see page 50). In key lists, you may also add descriptions and dimensions.
- [Select any dimension as the Group By or Filter By](#) (see page 52).
- [Highlight data](#) (see page 54).
- [Duplicate a widget](#) (see page 57).
- [Access advanced options](#) (see page 58) (general settings, grid settings, graph settings, navigation links, and dashboard settings).

When you are finished exploring

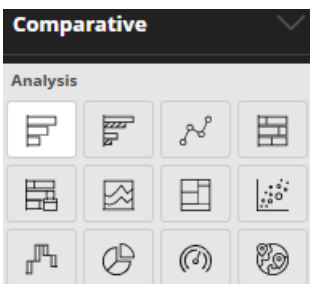
When you are done exploring, you can:

- Use the browser's back button to go back to your previous dashboard/mode.
- [Save](#) (see page 67) your changes in a new dashboard. The resulting dashboard will use the same formatting as explore mode (i.e., maximized widgets in a tabs).

Change the analysis type in explore mode

To change the analysis type

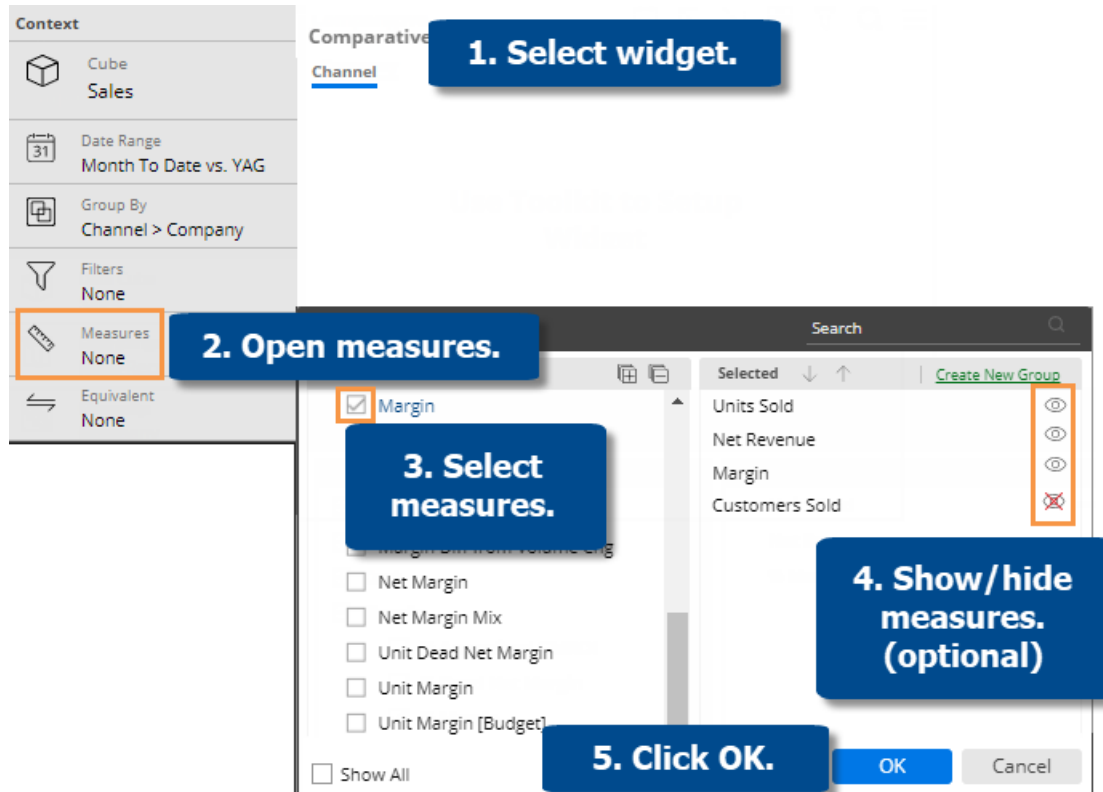
1. Select the widget.
2. At the top of the toolkit, click the button of the desired [analysis type](#) (see page 74).




Add measures in explore mode

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

To add measures

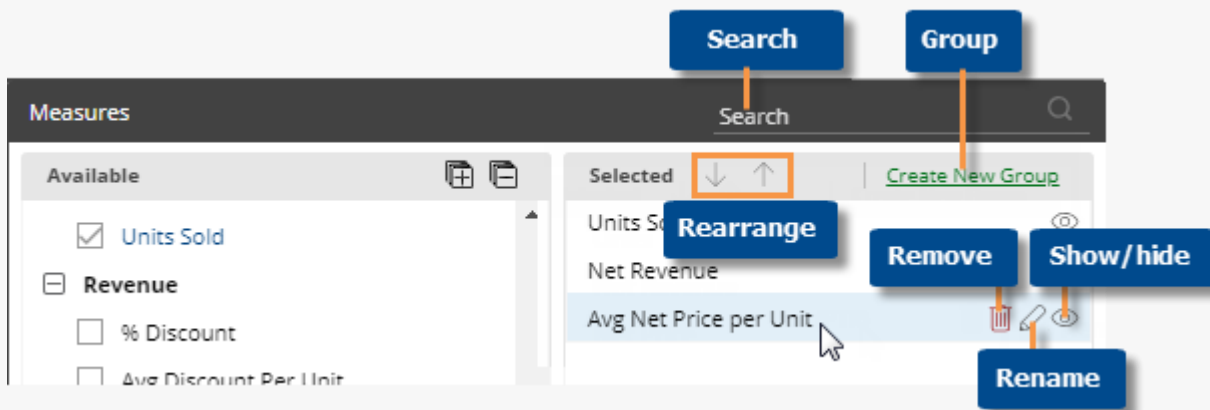


1. **Select widget** - Click on the widget if it's not already selected.
2. **Open measures** - In the Toolkit panel, expand the **Context** area and click on **Measures**.
3. **Select measures** - Under **Available**, expand the data category and then check the box(es) of the measure(s) to show. The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

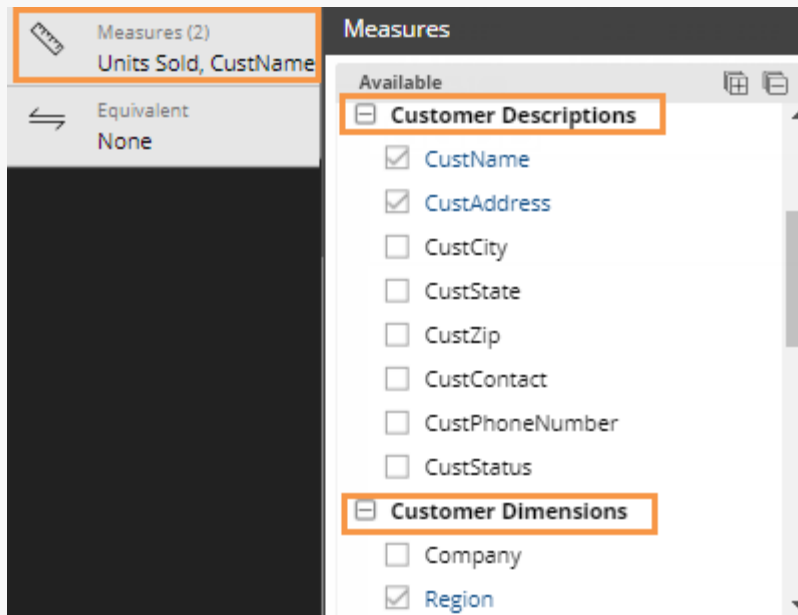
Tips:

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

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




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

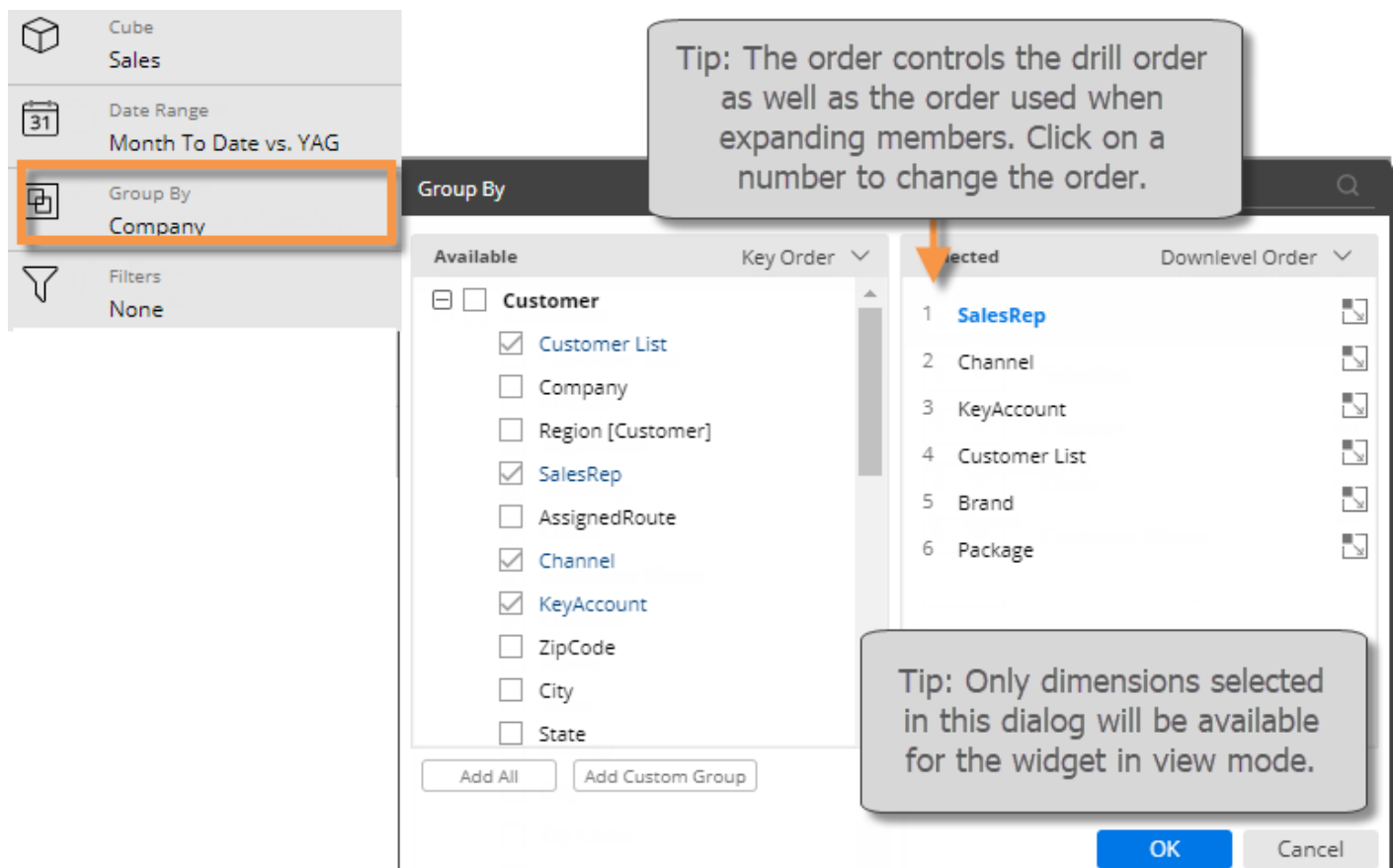


Group or filter by any attribute in explore mode

In [explore mode](#) (see page 48), you can select any attributes in the dataset; you are not limited to those built into the dashboard. In comparative widgets, these attributes control how the data can be grouped (i.e., Group By), expanded, drilled on, and filtered. In non-comparative widgets (Trend, Gauge, Waterfall, etc.), these attributes control what filters can be applied (i.e., Filter By).

Group By (in comparative widgets)

1. Click on the widget and then click on **Group By** in the toolkit.
2. In the dialog, select the desired Group By attribute(s):
 - To add a Group By attribute, checkmark it on the left pane of the dialog. To search, type the first few characters at the top of the dialog.
 - To change the order of the selected Group By attributes (i.e. drill order), drag and drop in the right pane or select from the number drop-down menus.
 - *(Optional)* To turn on auto-expand for a dimension, click the  button in the right pane. This will expand all members of the dimension. The results will be different depending on the type of view: [standard grid \(i.e., tree\)](#) (see page 26); [flat view grid](#) (see page 28); or [expanded graph formats](#) (see page 29).
3. Click OK.



Group By

Available

- ☐ Customer
 - ☒ Customer List
 - ☐ Company
 - ☐ Region [Customer]
- ☒ SalesRep
- ☐ AssignedRoute
- ☒ Channel
- ☒ KeyAccount
- ☐ ZipCode
- ☐ City
- ☐ State

Selected

- 1 SalesRep
- 2 Channel
- 3 KeyAccount
- 4 Customer List
- 5 Brand
- 6 Package

Tip: The order controls the drill order as well as the order used when expanding members. Click on a number to change the order.

Tip: Only dimensions selected in this dialog will be available for the widget in view mode.

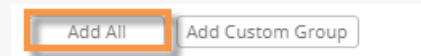
OK Cancel

Tips:

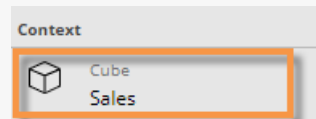
You can swap a By in the Group By dialog by clicking the original dimension in the right pane, placing your cursor over a different dimension in the left pane, and clicking the arrow button.



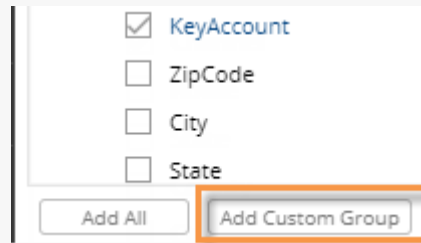
You can quickly add all dimensions using a button at the bottom of the left pane.



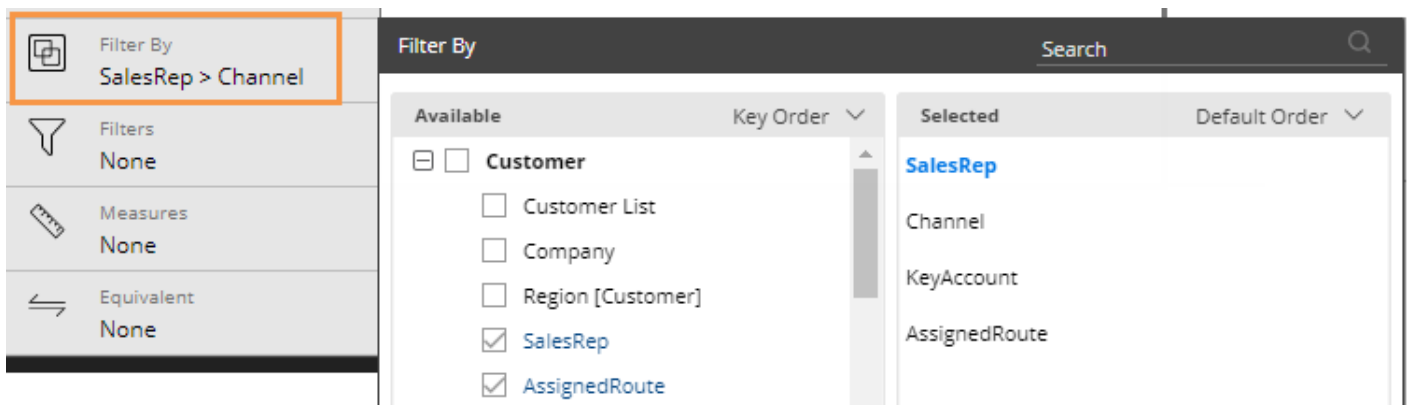
If the desired By is not listed, you may need to change the data cube using the drop-down menu in the context panel.



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

**Filter By (in non-comparative widgets)**

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




Highlight data

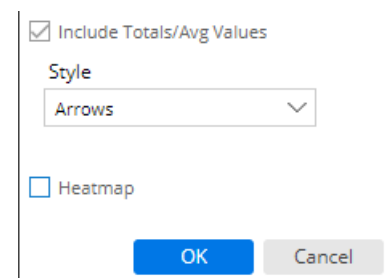
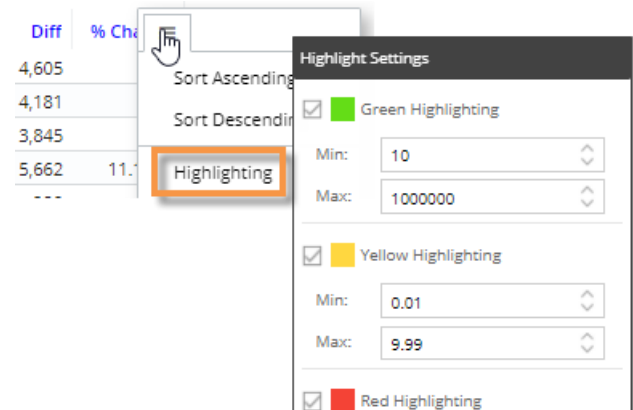
You can highlight data based on custom criteria or percent of the total (i.e., heatmap) to spot areas of concern or importance. The availability of highlighting depends on the widget type.

Grid highlighting based on custom criteria

<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**.



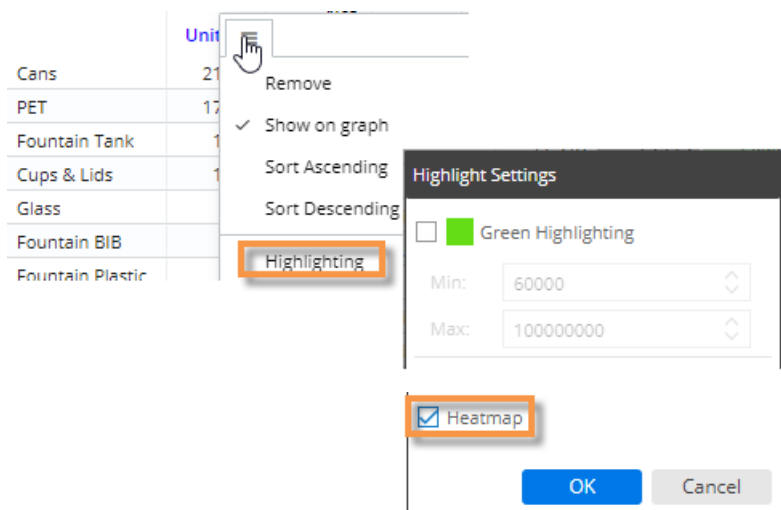
Heatmap highlighting in grids

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

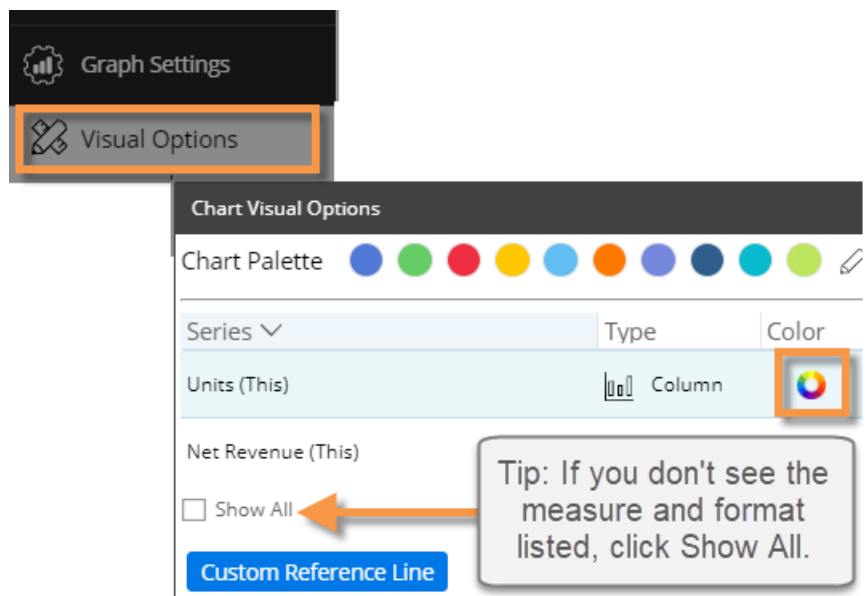
To turn on heatmap highlighting (in explore mode)

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**.

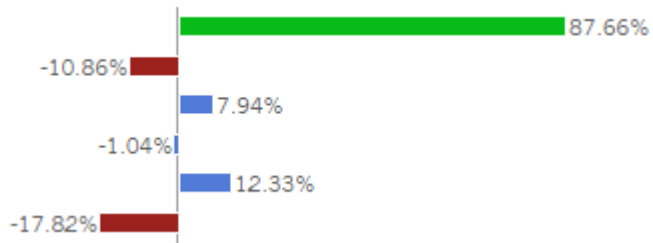


6. Optionally, choose a custom color in Graph Settings, Visual Options. Locate the specific measure and format (e.g., Units for This date range) and then click in the Color column. This color will serve as the darkest shade possible, with other shades calculated accordingly.


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.)



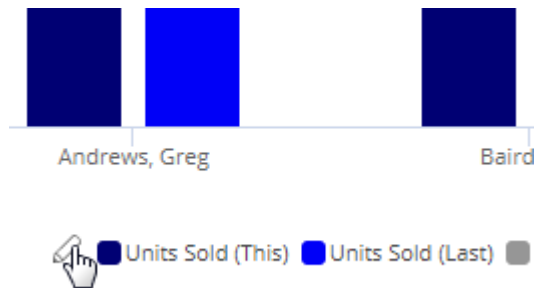
Graph highlighting







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 48), 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

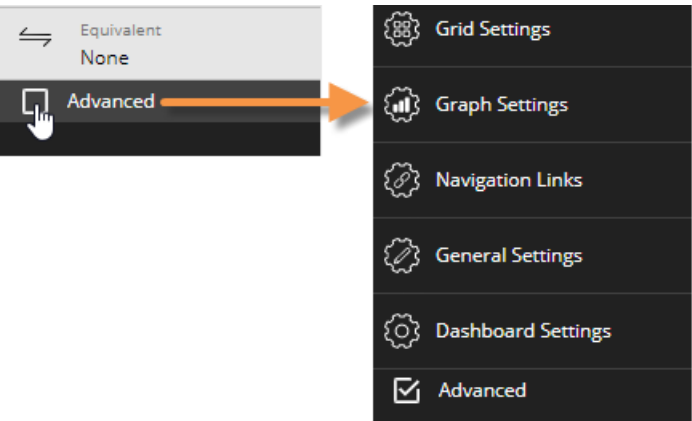
1. In explore mode, select the widget/tab you want to duplicate.
2. On the widget title bar, click the menu button and select Duplicate Widget, or press + on the keyboard.
3. Make changes to the new widget as desired.

Advanced options

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.

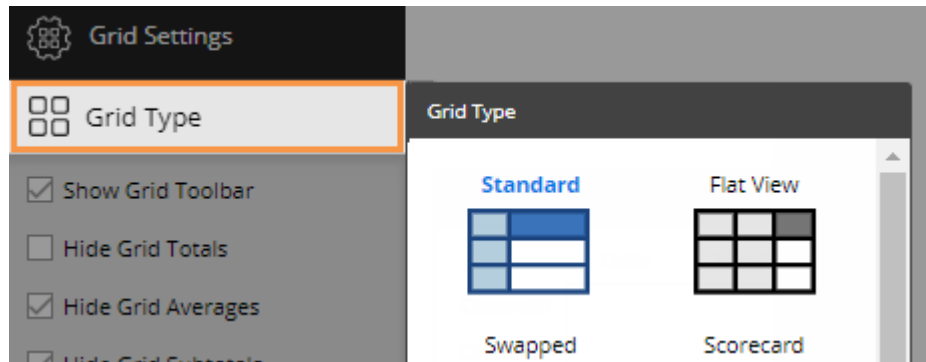


The following settings become available.

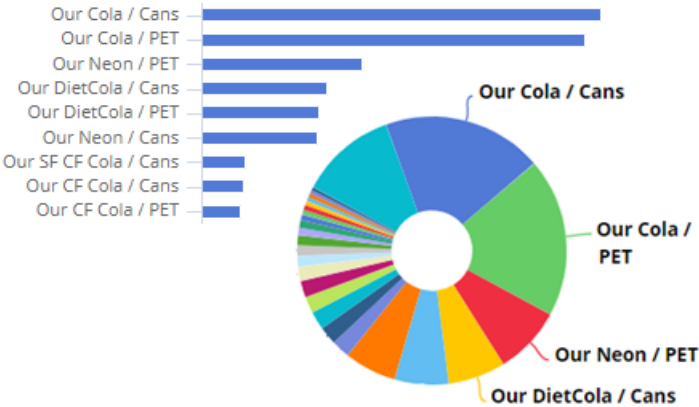
Area	Settings
Grid Settings	Grid page size, infinite scrolling, show/hide totals, grid types (see page 59), etc.
Graph Settings	Graph page size; orientation; show/hide legend, axis, labels; visual options (see page 61), trellis, etc.
Navigation Links	Embedded links to other dashboards
General Settings	Widget title, style, size, position, transparency, enable/disable options for view mode, etc.
Dashboard Settings	Member coloring (see page 64), host code display settings, Knowledge Manager settings, metric coloring in grids, etc.

Grid types

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 29). 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.



Grid type	Example	Explanation																																			
Standard	<table><thead><tr><th>Region</th><th>This ↓</th><th>Last</th><th>% Change</th></tr></thead><tbody><tr><td>> <input type="checkbox"/> SouthEast Area</td><td>73,794</td><td>116,284</td><td>-36.54</td></tr><tr><td>> <input type="checkbox"/> SouthWest Area</td><td>60,364</td><td>89,170</td><td>-32.30</td></tr><tr><td>> <input type="checkbox"/> NorthWest Area</td><td>57,685</td><td>83,206</td><td>-30.67</td></tr><tr><td>▼ <input type="checkbox"/> East Area</td><td>57,196</td><td>85,956</td><td>-33.46</td></tr><tr><td> > Carbonated</td><td>54,648</td><td>82,242</td><td>-33.55</td></tr><tr><td> > Non-Carb</td><td>1,956</td><td>2,966</td><td>-34.05</td></tr></tbody></table>	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>							
	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																																		
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> Carbonated	54,648	82,242	-33.55																																		
> Non-Carb	1,956	2,966	-34.05																																		
	<div><table><tbody><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></tbody></table></div>	Our Cola	Cans		PET		Glass		Our Neon	PET		Cans		Our DietCola	Cans		PET		Glass		<p>In graphs with auto-expanded dimensions (see page 29), 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><thead><tr><th>Region</th><th>Type</th><th>This ↓</th><th>Last</th><th>% Change</th></tr></thead><tbody><tr><td>> SouthEast Area</td><td>Carbonated</td><td>67,439</td><td>106,188</td><td>-36.49</td></tr><tr><td>> SouthWest Area</td><td>Carbonated</td><td>57,028</td><td>84,426</td><td>-32.45</td></tr><tr><td>> NorthWest Area</td><td>Carbonated</td><td>54,707</td><td>79,084</td><td>-30.82</td></tr><tr><td>> East Area</td><td>Carbonated</td><td>54,648</td><td>82,242</td><td>-33.55</td></tr><tr><td>> Near West Area</td><td>Carbonated</td><td>16,829</td><td>24,866</td><td>-32.32</td></tr><tr><td>> SouthEast Area</td><td>Non-Carb</td><td>5,067</td><td>8,340</td><td>-39.24</td></tr></tbody></table>	Region	Type	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 flat view grid (see page 28) is like the standard format except it places expanded dimensions in separate columns so rows can be treated independently.</p>
Region	Type	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																																	
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> Near West Area	Carbonated	16,829	24,866	-32.32																																	
> SouthEast Area	Non-Carb	5,067	8,340	-39.24																																	

Grid type	Example	Explanation																	
		In graphs with auto-expanded dimensions (see page 29), 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																	

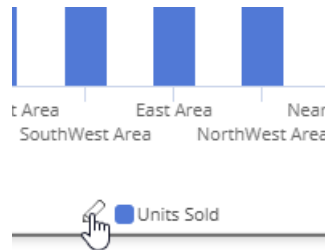
Visual options

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).

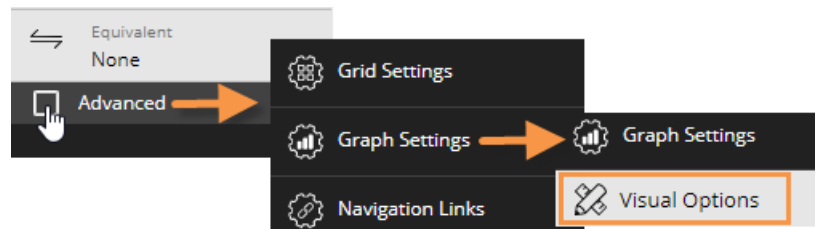


In explore mode:


Checkmark Advanced at the bottom of the toolkit.

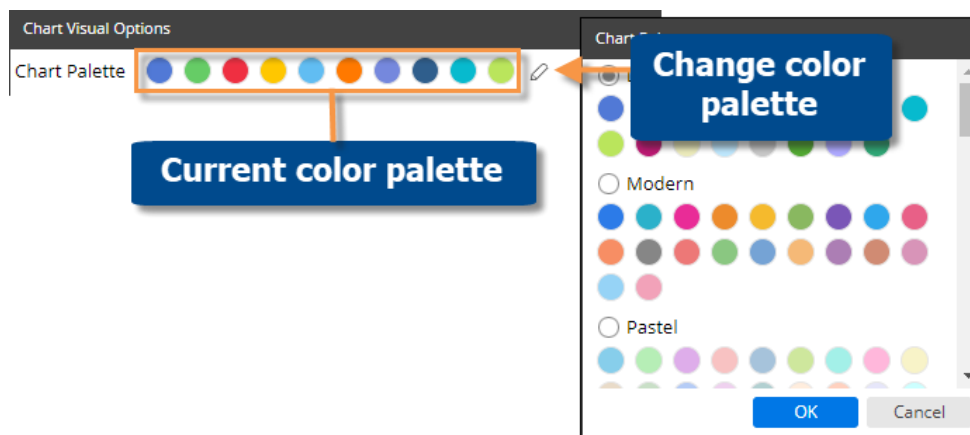
Expand Graph Settings.

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 the graph components. Salient Dashboards will apply the selected palette's colors in the order they are shown (e.g., blue to first component, green to second component, etc.). The available palettes depend on the dataset configuration.



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

Customize graph components

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

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

Point or line style

Size: width, thickness, etc.

Series	Type	Color	Style	Size
Units Sold (This)	Column	[Color icons]	N/A	80%
Units Sold (Last)	Column	[Color icons]	N/A	80%
Net Revenue (This)	Marker	[Color icon]	● ▼ ■ ◆	4px
Net Revenue (Last)	Marker	[Color icon]	● ▼ ■ ◆	4px
Average Volume		[Color icon]	— — — — —	2px

☐ Show All

Custom Reference Line

Delete

OK Cancel

Color

- [Color icon] = auto-select from color palette
- [Color icon] = highlight
- [Solid color icon] = user-selected

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.

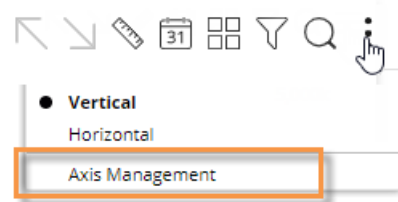
To customize axes

Before proceeding, [add the desired measures](#) (see page 50).

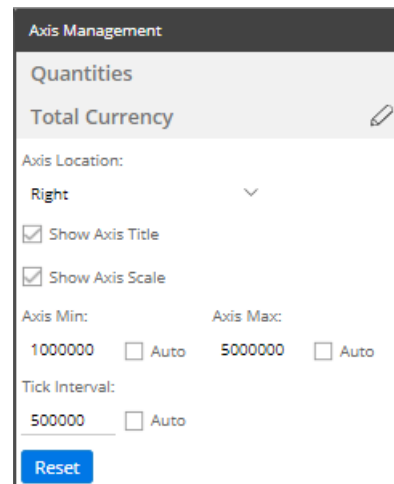
1. Click  in the upper-right corner of the widget, and select Axis Management.
2. For an actual value graph, choose the axis to customize (e.g., Quantities, Total Currency, etc.). Depending on the selected measures, the graph may include multiple axes, each of which represents a measure or data family.

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.





Actual value axis settings:



Axis Management

Quantities

Total Currency 

Axis Location: **Right** 

☒ Show Axis Title

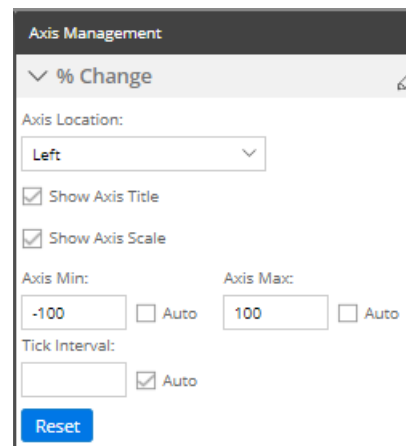
☒ Show Axis Scale

Axis Min: **1000000** ☐ Auto Axis Max: **5000000** ☐ Auto


Tick Interval: **500000** ☐ Auto


Reset

Percent change axis settings:



Axis Management

% Change 

Axis Location: **Left** 

☒ Show Axis Title

☒ Show Axis Scale

Axis Min: **-100** ☐ Auto Axis Max: **100** ☐ Auto

Tick Interval: ☐ ☒ Auto

Reset

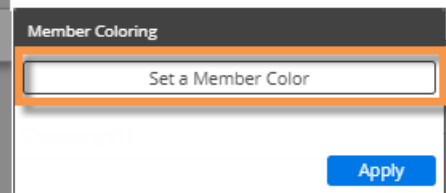
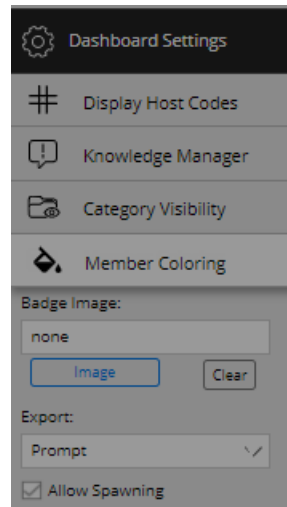
Member coloring

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 61). Member colors do not carry over from one dashboard to another; however, you can [import settings for member coloring](#) (see page 66).

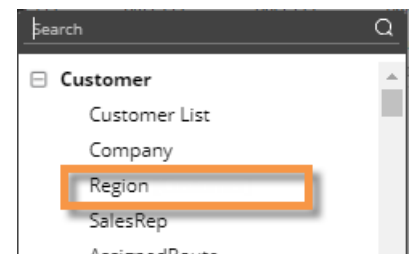
To apply member coloring

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.

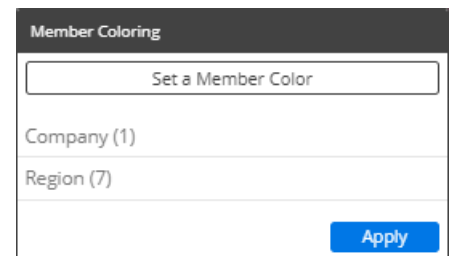
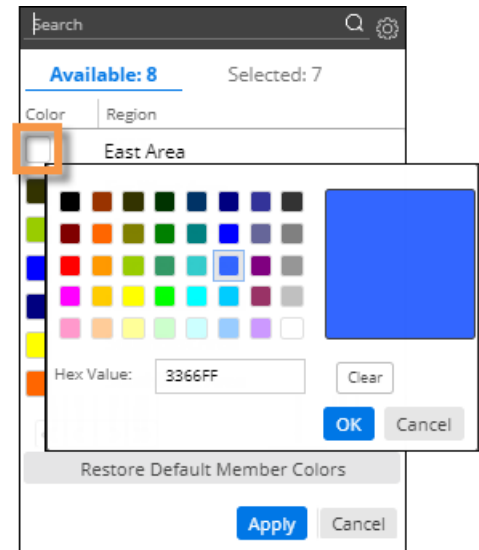


4. In the next menu, choose the dimension.



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.

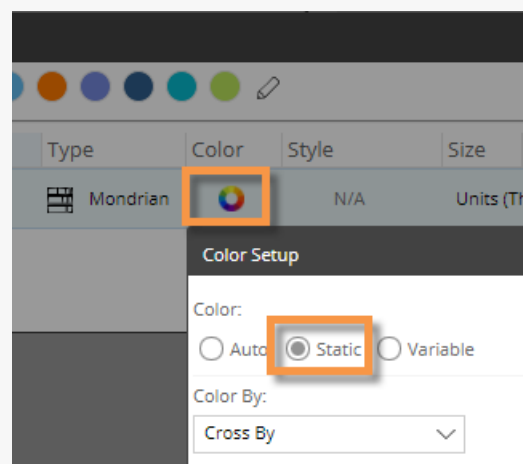


Tips:

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

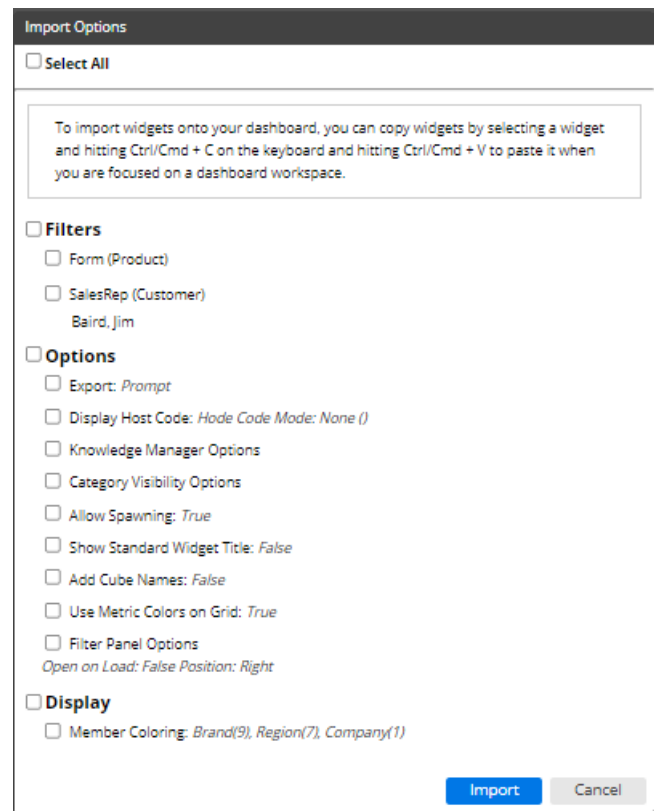
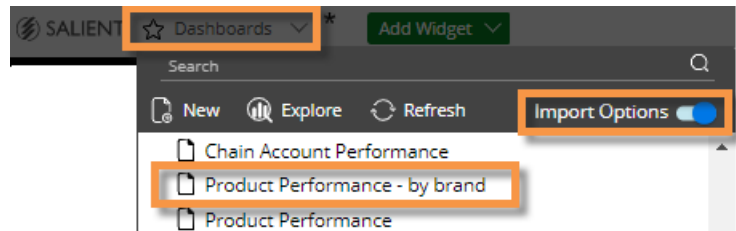
1. Open the dashboard to which you want to apply the settings.
2. Go to the dashboards menu at the top of the screen.
3. Turn on **Import Options**.
4. Click on the name of the dashboard that has the settings you want to import.
5. In the Import Options dialog, check the settings you wish to import, 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 64) and may also include a background image and badge image (if used).

6. Click **Import**.



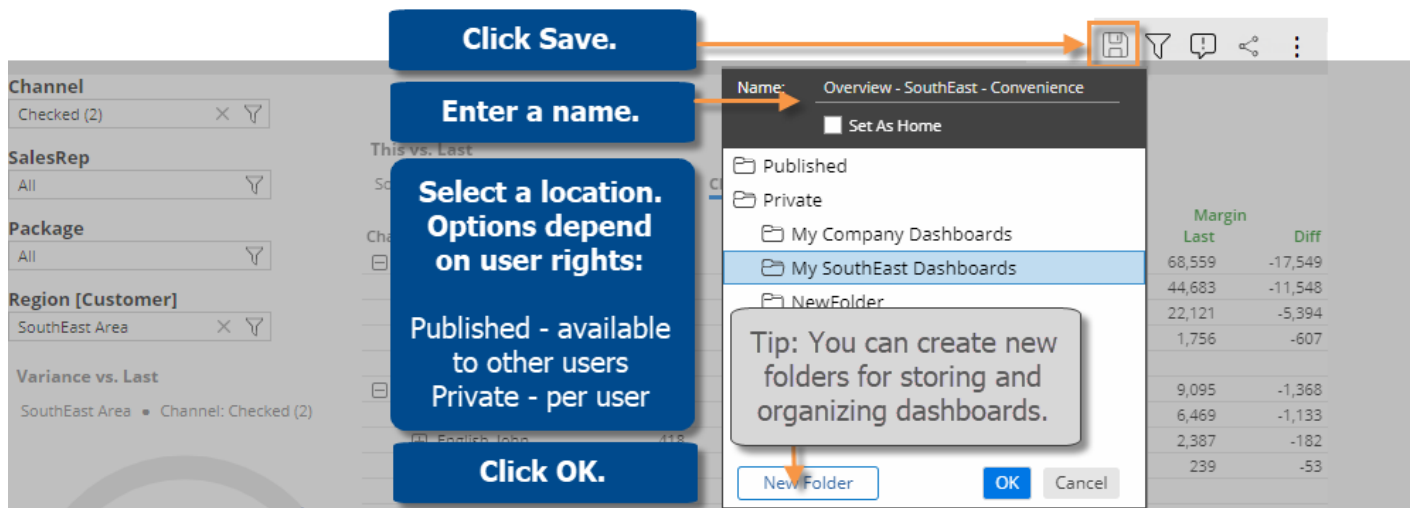
Save and share

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 68).

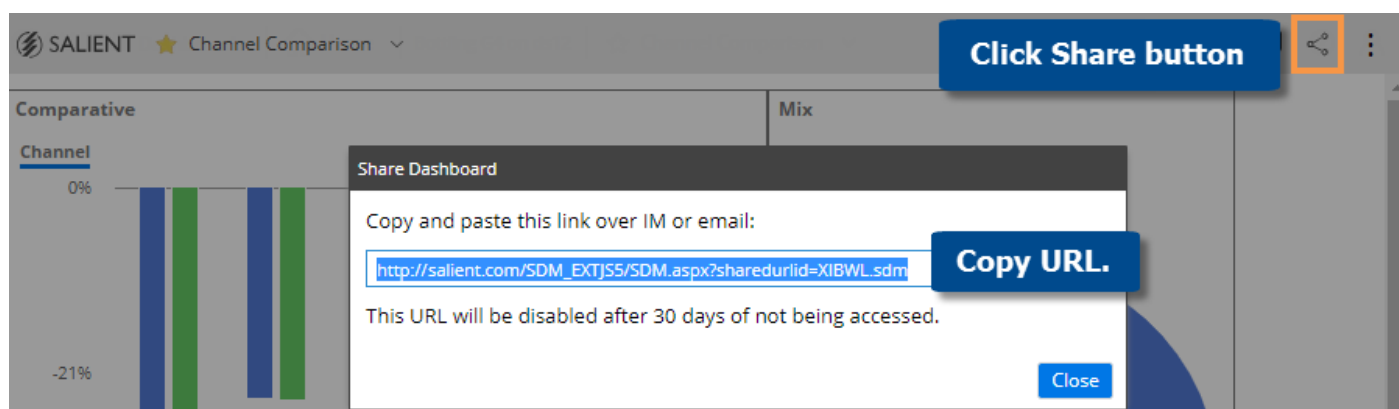
Share a dashboard

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

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

To share a dashboard

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




Export data from a widget

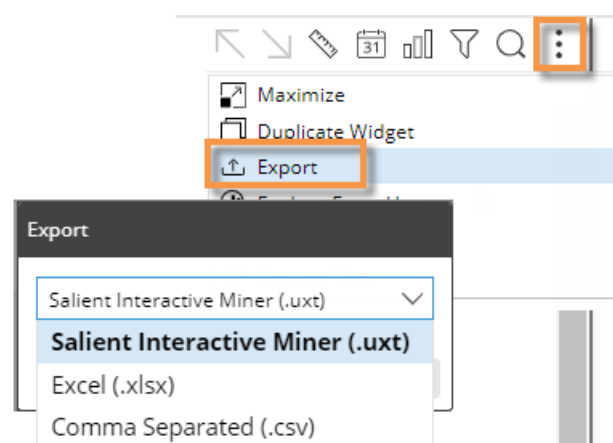
You can export the data from a widget to one of the following file types, depending on dashboard and widget settings. This option is available in a grid or graph; however, only the data (i.e. not the graph) will be included in Excel and comma-separated value files.

- UXT file (.uxt), which can be opened in SIM 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 71).

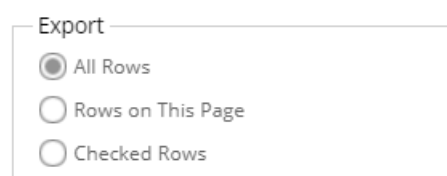
To export data from a widget

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).



To export data from a widget

- 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.

Export Expansions

☒ Current Grid Expansions

☐ Expand And Export To

1. Department

▼

☐ Include Subtotal Rows

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

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

- 6. 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 supgroupings.
- 7. Specify the file name to use.
- 8. 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:

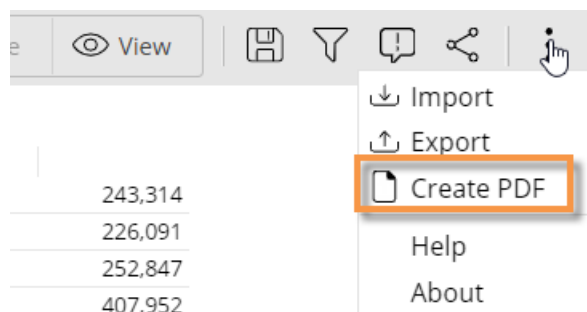
- Choose Record Details as the 1st By prior to exporting. The resulting file will show data at this level. Expansion options will not be available during the export process.
- Choose Record Details as the 2nd By prior to exporting. During the export process, you can optionally choose to expand data down 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

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



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

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

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

6. Click **Create**.

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

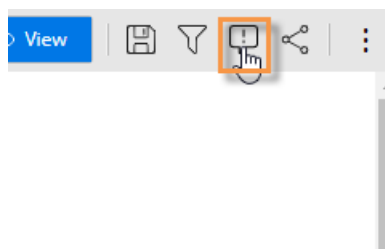
Knowledge Manager

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

To show the Knowledge Manager panel

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

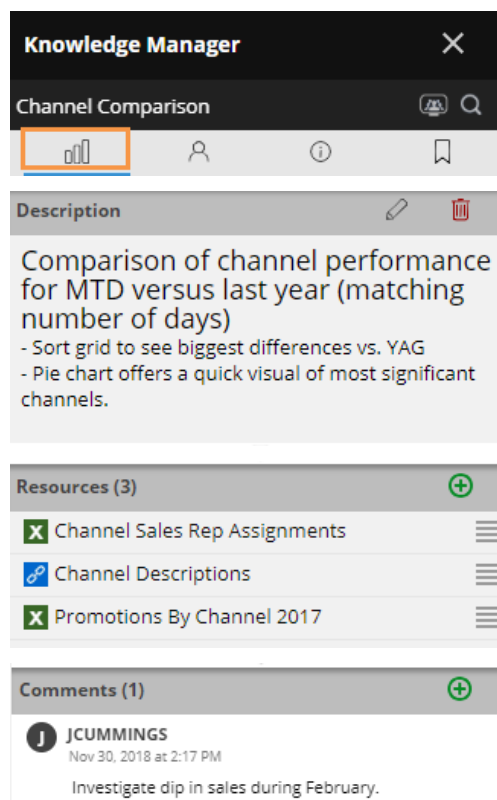
Knowledge Manager includes the following tab.



Dashboard Info

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

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



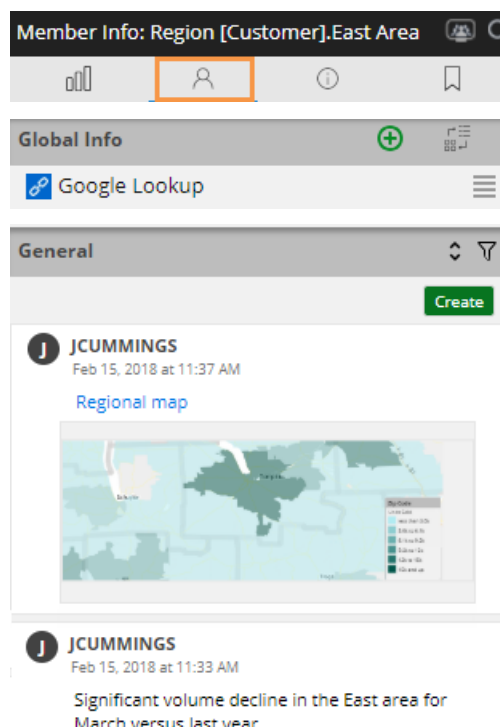
Member Info

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

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

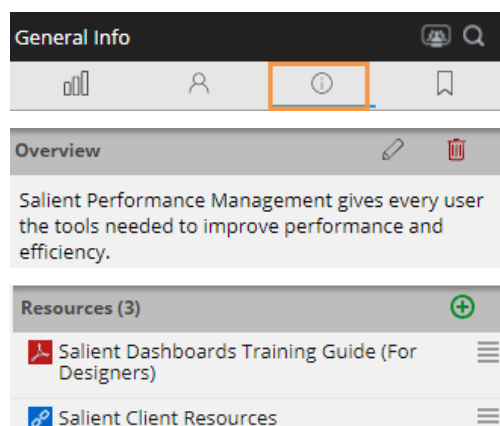
Media examples include news stories, events or related websites.

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



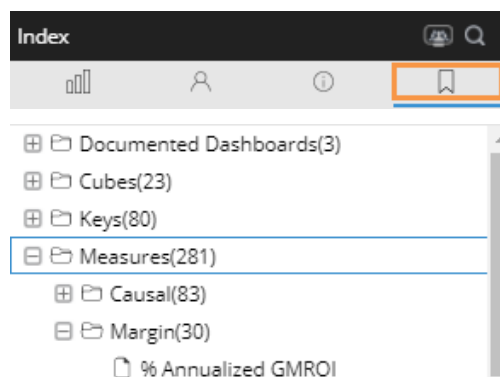
General Info

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



Index/Search

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



Types of data analysis widgets

A dashboard can include any of the following data analysis widgets. In explore mode, you can [change the analysis type](#) (see page 49). 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 of measures.




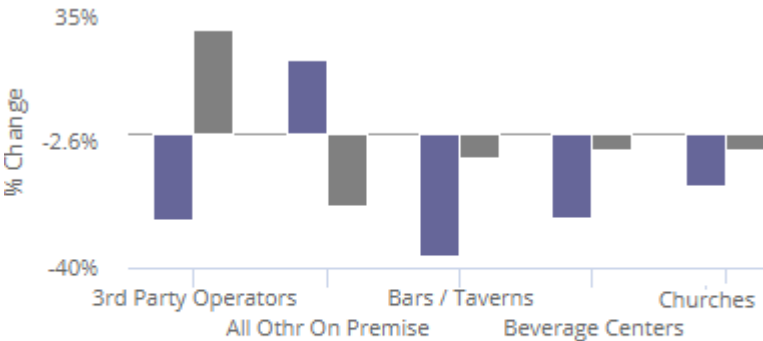
Region	Units		Margin	
	This ↓	% Change	This	% Change
> <input type="checkbox"/> SouthEast Area	69,324	7.12	272,800	0.00
> <input type="checkbox"/> SouthWest Area	65,067	6.87	240,924	1.70
> <input type="checkbox"/> East Area	58,896	6.98	194,826	-4.60
> <input type="checkbox"/> NorthWest Area	56,410	11.16	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


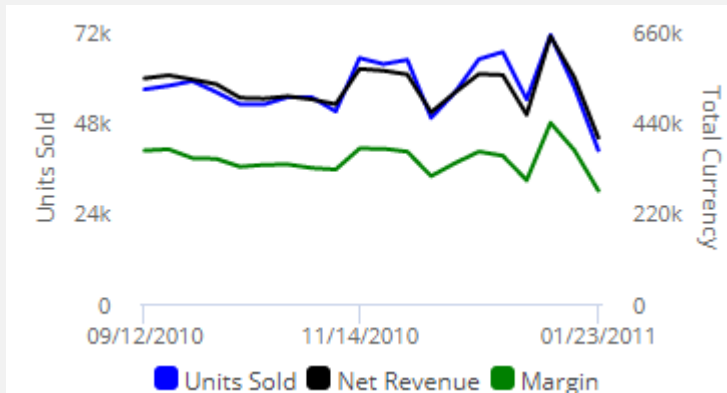

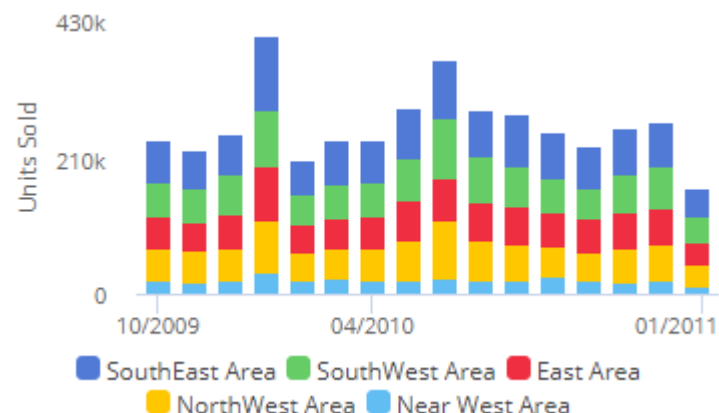



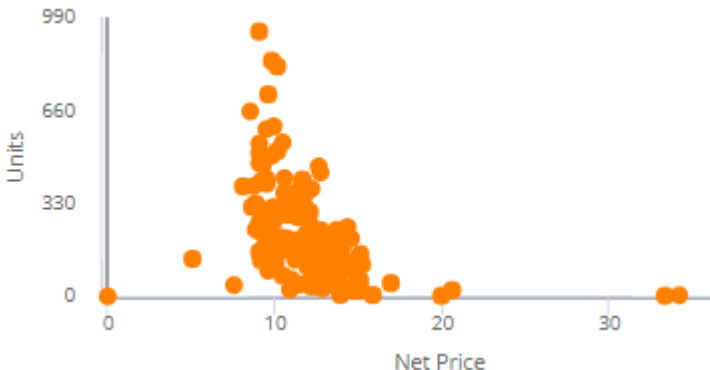


Units Sold (This) Margin (This)


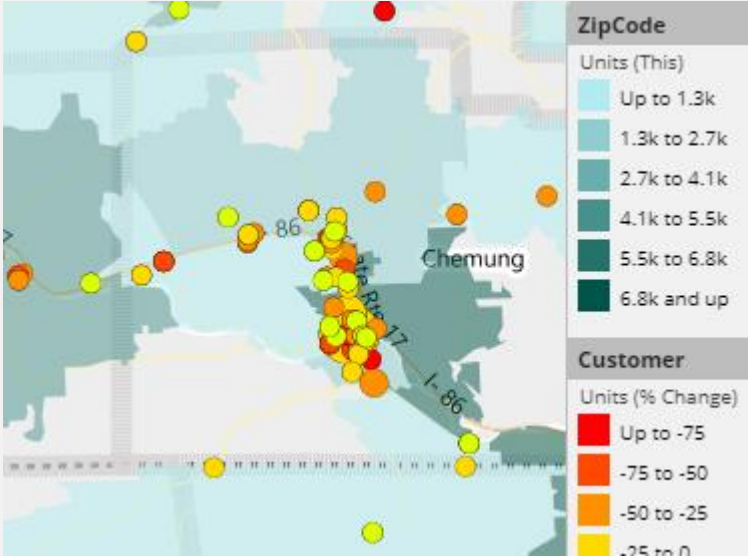

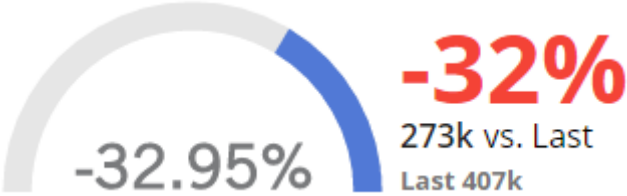

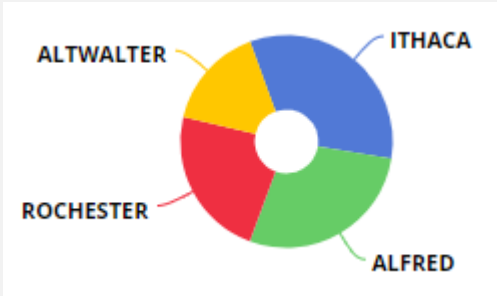


Units Sold [This vs Last] Net Revenue [This vs Last]

Analysis type	Examples																																																
<div></div> <div>Crosstab</div> <p>Comparison grid or graph that organizes data by two different attributes (i.e., dimensions) to examine cross-sections of data.</p>	<table><tr><th>Region</th><th>Our Cola</th><th>Our Neon</th><th>Our DietCola</th><th>Our Lemon-Lime</th></tr><tr><td>> <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>> <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>> <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>> <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>> <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>> <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></table> <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>Multi Comparative</div> <p>Comparison of members for any number of date ranges; any number of measures</p>	<table><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><tr><td>> <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>> <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>> <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>> <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>> <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>> <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></table> <div></div> <div><div><div></div>Units Sold [This vs Last] (Month To Date vs. YAG)</div><div><div></div>Units Sold [This vs Last] (Last 12 Months vs. YAG)</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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Analysis type	Examples																																																												
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<div> <i>Exception</i></div> <div>Pass and fail of key members for an exception test (e.g., customers with units >=1)</div>	<table><tr><th>Channel</th><th>Totals ↓</th><th>Passed</th><th>% Passed</th><th>Failed</th><th>% Failed</th></tr><tr><td>> <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>> <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>> <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>> <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>> <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>> <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>> <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>> <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>	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	
 <i>Scattergram</i> Plot of key members (e.g., customers) for two measures to show trends and outliers	
 <i>Waterfall</i> How the components of a calculated measure affect its make-up	

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

Tips:

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

About Salient

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

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

For more information, visit www.salient.com.



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