



Salient Mobile Setup Guide

Version 1.9.27

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Table of Contents

Introduction	3
Build Dashboards	5
Set Up Users	12
Additional Setup	15

Introduction

Salient Mobile dashboards put critical information at the fingertips of users in a fast and easy-to-use app. Users can select information and view widgets just like in traditional web-based dashboards with the advantage of a simplified view that is touch-enabled and optimized for viewing on mobile devices.



About the solution

The Salient solution was designed to help managers align, measure and improve their organizations. It provides a logical, intuitive interface that enables visibility into performance feedback from daily activities.

How it works

Salient browser-based dashboards and the Salient Mobile app are fully-integrated. In the Salient Dashboards browser-based application, Dashboard Designers can create, design, and publish dashboards using a variety of widgets, filters, and options. The dashboards will then be available in the mobile app, where users can view and interact with the data. Data access and features can be tailored to each user. The end result is a set of custom dashboards that are easily accessible and optimized for any device. An enhanced "explore" mode allows power users to further investigate the data—by changing the analysis type, grouping by any attribute, adding more measures, etc.

Overview of the setup process

Follow the steps outlined in this document to make dashboards available in the mobile app. For more information about building dashboards, see the Salient Dashboards online help or user manual.

1. [Build dashboards in "edit mode"](#) of the Salient Dashboards browser application.
2. [Set up users](#) by directing them to download and install the Salient mobile app.
3. [Perform additional setup tasks as needed](#) (e.g., configure location services).

Version compatibility

The mobile app requires Version 6.20 or higher of the Salient Dashboards web application. To take advantage of recent enhancements, we recommend using the latest version of Salient Dashboards.

Build Dashboards

Dashboards are built using the Salient Dashboards browser-based application in "edit" mode. You can access this application by going to the login page in any supported browser and then going to "edit mode" (additional rights required). You can then build a dashboard by adding widgets, adding measures, selecting Group Bys, filtering, setting the date range, customizing widgets, setting up layouts, and more. Then, save the dashboard to make it available to mobile app users.

The screenshot shows the Salient Dashboards application in "edit" mode. The interface includes a top navigation bar with "Back", "Edit", "Explore", "View", and a save icon. A "Toolkit" panel on the left lists various widget types like Gauge, Analysis, and Scattergram. The main workspace contains several widgets: a Gauge showing "-32.95" and "273,537 vs. Last", a Scattergram, and a stacked bar chart. Three callout boxes provide instructions:

- 1. Add and customize widgets.**
 - add measures
 - select dates
 - group by
 - choose filters
 - other settings
- 2. Set up layouts. (optional)**
 - select "Workspace"
 - turn on "Show This View in App"
 - choose layout settings
 - arrange widgets
- 3. Save and share**

The "Workspace" panel on the left shows layout settings for "Phone Layout", including "# of Columns" (2), "Row Height" (40), "Gutter Spacing" (H: 8, V: 8), and "Dashboard Margin" (H: 8, V: 0). The "Show This View in App" checkbox is checked.

Refer to the following tips and the *Salient Dashboards User Manual* for more information.

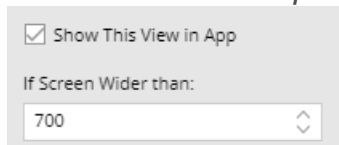
Layout

Depending on the version number of Salient Dashboards, the following methods are available to control a dashboard's layout in the mobile app.

- **Layouts created in the Salient dashboards browser application** - In Salient Dashboards Version 7.80 and higher, Dashboard Designers can design a "phone" layout and "desktop/tablet" layout for each dashboard from within the browser application. This method provides streamlined dashboard management because mobile and browser-based dashboards can be created from a single place.

- The "Show This View in App" setting must be on to use these layouts in Salient mobile. If both layouts (phone and desktop/tablet) are enabled, the Salient mobile app can automatically switch between these layouts based on screen width.

Example: Desktop/tablet layout on screens over 700 pixels wide; phone layout on screens under 700 pixels wide



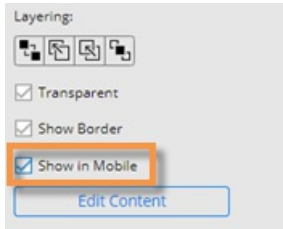
- This layout type may be longer than the screen, in which case mobile users will be able to pan up and down in the dashboard. If the dashboard's widgets extend to the right side of the screen, mobile users can use "dashboard panning" mode to pan the entire dashboard or turn this mode off to scroll within widgets. If the widgets are narrower than the screen, this mode is not available; however, users can swipe in the blank area to pan or within widgets to scroll.

See the *Salient Dashboards User Manual* or help for more information.

- **Layout created within the Salient mobile app** - In all released versions, users who have the necessary rights can [create a layout within the mobile app](#) after creating and saving the dashboard in the browser application. In this method, a Power Viewer or Dashboard Designer can select the number of panes, pick widgets for each pane, and choose other settings in the mobile app itself. Modifying the layout of a published dashboard requires "publish" rights. If a phone layout or desktop/tablet layout is enabled as previously described, it will override the layout defined in the mobile app.
- **Default layout** - If a dashboard does not have a layout defined in the browser application or mobile app, then the mobile app will show one widget at a time in a single pane. Additional widgets will be available via swipe or scroll.

Widget types

The Salient mobile app displays most types of widgets. However, as you design dashboards, keep in mind that some widgets may not be visible or may require additional settings to display them in the mobile app.

Widget type	Mobile app visibility
All data analysis widgets (Comparative, Trend, etc.)	Yes
Custom views	Yes
Tabs	Yes (requires a phone layout or desktop/tablet layout built in Salient Dashboards V7.80+)
Buttons, text/HTML, and images	<p>Yes (if "Show in Mobile" is turned on in the widget's general settings; requires a phone layout or desktop/tablet layout built in Salient Dashboards V7.80+)</p> 
Lines, dashboard links, and Knowledge Manager widgets	No

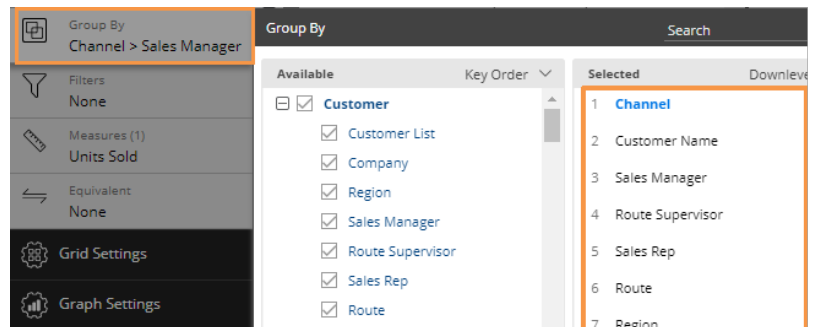
Group By

Users with Power Viewer licensing and higher will be able to change the Group By the following ways in the mobile app:

- In explore mode, all attributes will be available for selection.

- From the breadcrumb path (i.e. not in explore mode), Power Viewers can select from the Group By attributes that are built into the widget during dashboard creation. Therefore, you may want to select multiple "Group By" attributes when building the dashboard.

Example: Building a dashboard with multiple Group By attributes



Measure selection

Users with Power Viewer licensing and higher will be able to select measures the following ways in the mobile app:

- In explore mode, all measures will be available for selection.

- In regular viewing mode, Power Viewers can show/hide the measures that are built into the widget during dashboard creation. Therefore, you may want to add multiple measures when building the dashboard and then hide all measures except those that should appear at start-up.

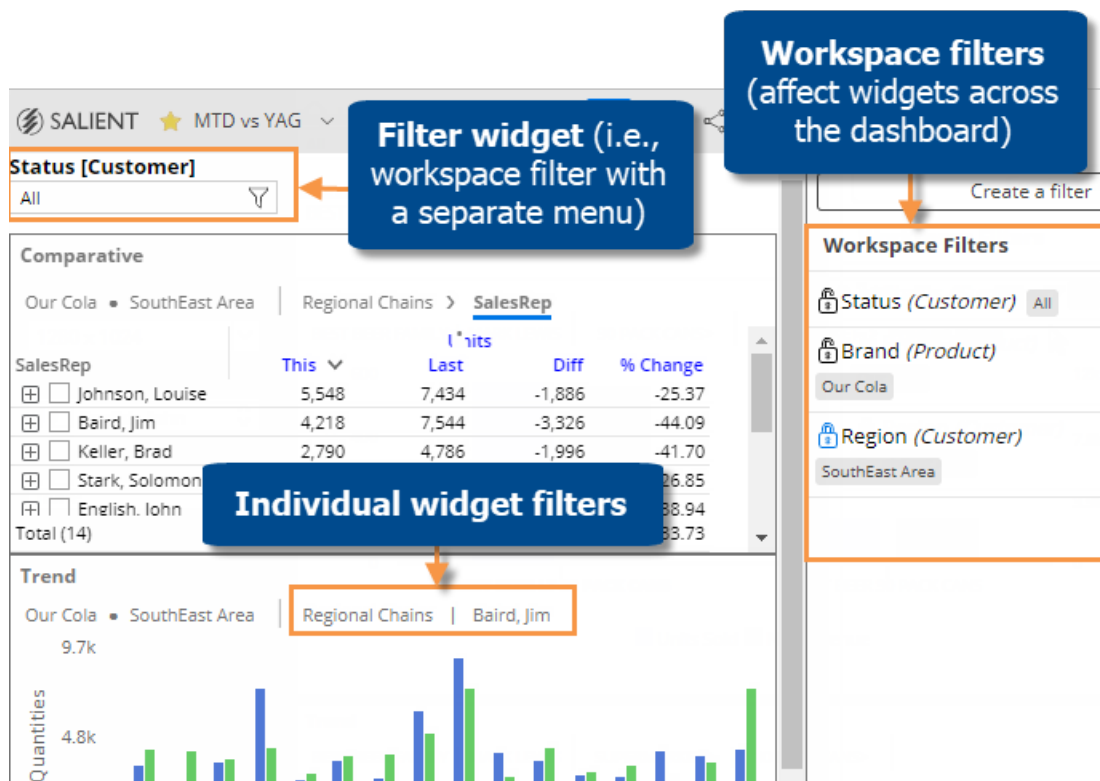
Example: Building a dashboard with multiple measures

Measures		Search	
Available		Selected	↓ ↑ Create New Group
<input type="checkbox"/> Quantities		CustName	<input type="checkbox"/>
<input type="checkbox"/> Income		Units	<input type="checkbox"/>
<input type="checkbox"/> Cost		Margin	<input type="checkbox"/>
<input type="checkbox"/> Margin		Net Price	<input checked="" type="checkbox"/>
<input type="checkbox"/> Duration		Net Revenue	<input checked="" type="checkbox"/>
<input type="checkbox"/> Causal		Customer Count w/Sales Units	<input checked="" type="checkbox"/>
<input type="checkbox"/> AvgInventory			
<input checked="" type="checkbox"/> Customer Count w/Sales Units			

Filter selection

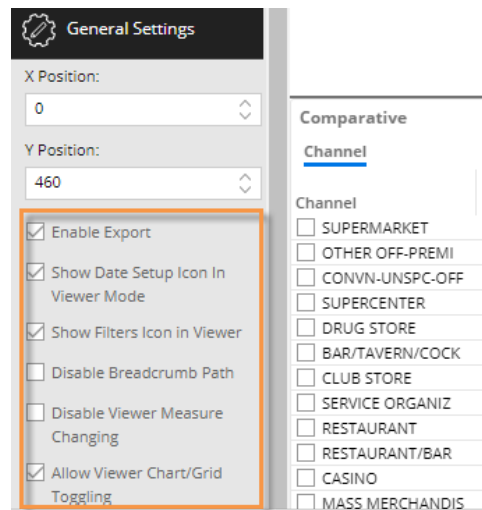
To enable filter selection in the mobile app, add one or more workspace filters. These may include filter widgets, workspace filters in the filters panel, and/or collections (with visibility on) applied to the workspace. Each of these filters will be available as a separate menu in the filters panel and will affect widgets across the dashboard by default. Mobile app users will be able to select from these menus in the filters panel, but they will not be able to add them (except Power Viewers who can use the collection feature). Mobile app users will be able to clear the dashboard filters (i.e., show data for all) and remove filters except those that include a filter widget in the original dashboard.

You may also apply filters to individual widgets. Mobile app users will be able to access these types of filters (except collections) via the breadcrumb path at the top of the widget, but they will not be able to add them.



Enabling/disabling mobile app features

General settings (in the toolkit) let you enable or disable exporting, date setup, widget filtering, measure selection, graph/grid toggling, and more. These settings affect view mode in browser-based dashboards and the mobile app. These settings do not restrict functionality in explore mode.



Saving dashboards

After creating the dashboard, save it to make it available in the mobile app. The available locations depend on your user account settings and control which users will be able to access the dashboard. (Data access may be further restricted based on user account settings.)

- Published - The dashboard will be available globally to all dashboard users.
- Unpublished - The dashboard will be available to Dashboard Designers only.
- Private - The dashboard will only be available to you.

Set Up Users

User accounts

Salient user accounts are set up in the Administrator's Utility for UXT. If dashboard users are already set up, you may not need to make any additions or changes, because dashboard users automatically have login rights for the Salient mobile app. The following account settings affect the specific capabilities that will be available in the mobile app. See the *Salient Dashboards Installation and Configuration Manual* for more information.

- User licensing - Users with Dashboard Designer or Power Viewer licensing have access to advanced features, including measure selection, Group By selection, dashboard save capabilities, collections, and explore mode. Rights to view and modify global/published components are controlled by additional account settings as explained in the *Salient Dashboards Installation and Configuration Manual*.
- User group - The user must belong to a group with access to dashboards. User groups also control access to save capabilities, Knowledge Manager, privileges for global data, publishing rights, and more. The "publish" right also allows users to modify mobile layouts of published dashboards.
- Features - The feature settings may restrict access to specific analysis types, conversions, and more, in the same way that they control these features in browser-based dashboards.
- Rights - The rights settings can restrict user access to specific parts of the dataset.
- Categories - User data categories let you select which global data categories should be available to the user when accessing and saving dashboards and collections.

Download & login

Once user accounts are set up, you can direct users to download the app and then log in.

User requirements

- The mobile app can be run on any of the following mobile operating systems: Android™ v 5+ ; Apple (iOS9+); Windows 8.1+. Custom views are not supported on Windows.
- Notifications must be allowed to use the Notify feature.

Direct users to download and install the Salient mobile app.

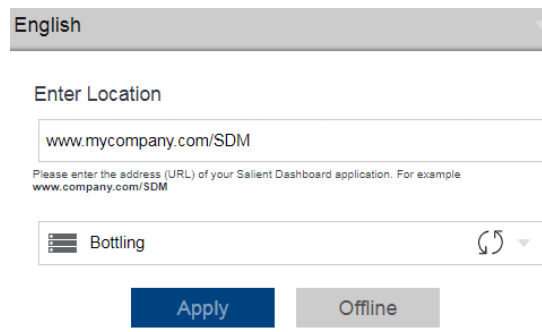
Download the app through the Google, Apple®, or Windows® public app stores.

In the app store, search for "Salient." Once you have located the "Salient" application published by Salient Corporation, follow the prompts to "get" or install the app. You can then open the app and log in as explained below.

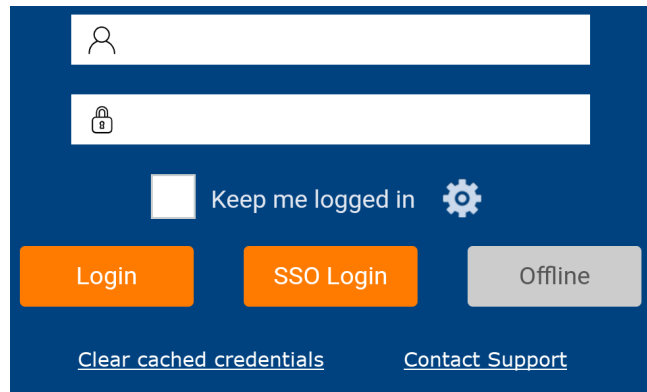
Direct users to log in

At a user's first login, the Salient mobile app will prompt the user to enter location of the Salient dashboards web application. As an administrator, you should communicate this location to users. On Android devices, https is required. The user can then select a dataset running at that location.

Users can also select a language at the top of the setup area. The language selection affects labels and menu options but not the dashboards themselves.




The user can then enter a user name and password. Depending on the server setup, the user may enter Salient credentials as defined in the Administrator's Utility or utilize SSO login. See the *Salient Dashboards Installation and Configuration Manual* for more information. In addition, you may be able to [pre-configure login settings for mobile users](#).

The image shows a login screen for the Salient mobile app. It has a dark blue background. At the top, there are two white input fields: the first for a username with a person icon, and the second for a password with a lock icon. Below these is a checkbox labeled 'Keep me logged in' next to a gear icon. There are three buttons: an orange 'Login' button, an orange 'SSO Login' button, and a grey 'Offline' button. At the bottom, there are two links: 'Clear cached credentials' and 'Contact Support'.

User access to dashboards

After logging in, users can open dashboards by tapping on them in the home screen. All published dashboards are automatically available in the mobile app.

In addition, you can share a specific dashboard with users by providing its URL. This can be accomplished using the  Share button in the mobile app or by creating a [mobile dashboard link](#). These capabilities are also available to end users.

User troubleshooting

Users can send log files to Salient support to assist with troubleshooting. To access this function, a user can click the [Contact Support](#) link on the login page or the Contact Support button in the mobile app settings area. When prompted, the user must allow Salient to access photos and media to enable this feature. To email via Microsoft Outlook instead of the device's default email app, the Microsoft Office Outlook Desktop Integration app must be installed. On Windows, the support email address may not populate automatically; in this case, the user can manually enter support@salient.com.

Additional Setup

The mobile configuration file

You can create a mobile configuration file to customize branding, configure location services, and choose other settings. The mobile configuration should be a text file with the settings described in this document. For a single dataset or to share settings between multiple datasets, only one mobile configuration file is needed. In this case, the file should be named `MobileConfig.json` and located in the root dashboards web application folder (e.g., `wwwroot/SDM`).

If you want to use different settings for multiple datasets, you can create a unique `.json` file for each dataset. In this case, you must modify the Salient Dashboards `sysconfig.xml` file to point to the correct mobile configuration file for each server. To make this change, add a `configMobileFileName` parameter equal to the name of the `.json` file in the `uxtServer` section of the `sysconfig.xml` file. See the following example.

```
<uxtServer host="123.456.789.01" storageHook="123.456.789.01"
displayName="MySet1" configDSFileName="config.DSN.MySet1.xml"
configGUIFileName="config.GUI.MySet1.xml"
configKMANFileName="kmanConfig.MySet1.xml"
configMobileFileName="MobileConfig1.json" description="Main dataset" />
```

Custom branding

You can optionally apply a custom color scheme to the mobile app using the following instructions. Custom branding uses an external CSS stylesheet to define the mobile app colors.

1. Modify the mobile configuration file.

You may need to create this file if you haven't already. See the previous topic "The mobile configuration file" for information about the required file name and location and, optionally, how to use different mobile configuration files for different datasets.

Within the mobile configuration file, specify the location and name of the `.css` file and, optionally, a series of colors to override the default colors used in graphs (pie slices, bars, etc.). You can enter the date or another unique identifier after the `.css` file path and name to determine when to

use the cached version of the .css file or download the .css file.

Example:

```
"cssPath": "css/MobileApp.css?05-17-15",
  "chart": {
    "seriesColors": ['#003366', '#800000', '#99CCFF', '#9933FF',
'#009933', '#FF0000', '#FF66FF']
```

2. Create a .css file (e.g., MobileApp.css)

This file defines the specific colors to use for various elements of the mobile app. If you use multiple mobile configuration files, you can also use multiple .css files with different settings for different datasets. We recommend storing the .css file(s) in the SDM/css directory; if the .css file is not located within the dashboard web application directories, then you must enter the full path in the mobile configuration file explained above. The following components can be defined within the .css file.

Main background

(Blue font on white background by default)

.primary-section

.primary-font-color

Headers

.primary-header *(Top toolbar on each page)*

.active *(Active tab text in Fav/Recent)*

.inactive *(Inactive tab text in Fav/Recent)*

.secondary-header *(Messages/Resources header on home page)*

Menus

.salient-menu

.dashboard-menu

.main-menu

Dialogs

.salient-dialog (*Most pop-ups*)

.salient-alert (*Alerts such as "Lost Connection"*)

Icons

(*Default icon class for icons that don't have a more specialized class. Use fill:#color.*)

salient-menu-icon

Sidebars

.salient-sidebar

.kman-sidebar

.filter-sidebar

.sidebar-header

.filters-heading

.knowledge-heading

Location services (nearby locations)

Perform the following steps to allow users to find nearby locations defined within the dataset (i.e., location services). For example, users could find nearby customers or assets. The resulting locations will be listed out along with descriptions, dimensions, and data, depending on the configuration settings discussed below. If you perform additional configuration (see Step 5), the mobile app will also display of a map of the nearby locations. The dataset must have a geographic data cube in order to configure and turn on location services.

1. Create a default location services dashboard.

- The information displayed by each result in the location services panel is based on a default dashboard. Create a default dashboard with the following elements:
- Add a widget that lists out members of the geo-coded key.
- In the widget, add all of the dimensions and key description fields you want to show in the Location panel. You can format and configure the order of these fields in Step 3.
- Add at least one measure to the widget. The Location panel will show the values and percent change for the first measure listed.
- Turn on highlighting for a measure. The Location panel will show a highlighting indicator based on the first highlighted measure. The first highlighted measure may be the same as the first measure or it may be different.
- Add filters to the dashboard. These filters will be available in the Location panel to allow users to filter their results.

For example:

Company	City	DriverNumber	Region	State
All	All	All	All	All

Comparative								
<u>Customer List</u>								
Customer	CustName	CustAddress	CustCity	This	Last	Sales Diff	% Change	
<input type="checkbox"/> 02009				2,395	0	2,395 ↑	100.00	
<input type="checkbox"/> 02004				370	0	370 ↑	100.00	
<input type="checkbox"/> 05002	GROTON HIGH JUICE	PERU ROAD	GROTON	344	0	344 ↑	100.00	
<input type="checkbox"/> 00002				210	0	210 ↑	100.00	
<input type="checkbox"/> 06002				128	0	128 ↑	100.00	
<input type="checkbox"/> 02700				117	0	117 ↑	100.00	
<input type="checkbox"/> 02001				108	0	108 ↑	100.00	
<input type="checkbox"/> 06300				100	0	100 ↑	100.00	
<input type="checkbox"/> 00100	ITHACA AGWAY FEED STORE	120 S FULTONST	ITHACA	79	30	49 ↑	163.33	
<input type="checkbox"/> 00000	Internal (For inactive Assets)		ELMIRA	46	0	46 ↑	100.00	
<input type="checkbox"/> 09700	SNYDERS	523 E HIGH ST	PAINTED POST	40	0	40 ↑	100.00	
<input type="checkbox"/> 03800				31	0	31 ↑	100.00	

2. Save default location services dashboard as .sdm file.

After creating the default location services dashboard, save it as an .sdm file and place the file in the root dashboards web application folder (e.g., wwwroot/SDM).

3. Define location service settings in the mobile configuration file.

You may need to create this file if you haven't already. See the topic ["The mobile configuration file"](#) for information about the required file name and location. Within this file, add or modify the following section to define the parameters for location services.

Example mobile configuration file (.json):

```
{
  "locConfig": {
    "geoCubeId":10,
    "geoKeyId":0,
    "availableDistances": [10, 20, 30, 40, 50, 100, 150, 200, 250,
500, 1000],
    "distanceUnit": "miles",
    "maxResults": 1000,
```

```

    "defaultDashboardName": "location_dashboard.sdm",
    "fieldFormatter": "<h1>{desc1}</h1><h2>Company</h2><p>{dim0}</p>
<h2>Address</
    h2><p>{desc2}</p><h2>City</h2><p>{dim7}</p><h2>State</h2><p>
{desc4}</p>"
  }
}

```

Parameter	Explanation
geoCubeld	Enter the cube ID of geographic data cube. Refer to the configuration report available through the SIM Support dialog to identify ID numbers for dataset components.
geoKeyld	Enter the ID of the geo-coded key within the geographic data cube.
availableDistances	Enter distances to make available in the Distance drop-down menu.
distanceUnit	Enter the desired unit of distance (either "miles" or "kilometers").
maxResults	Enter the maximum number of results to display at one time.
defaultDashboardName	Enter the name of the default location services dashboard (.sdm file) from which to pull data for the information displayed beside each result (see Steps 1 and 2). If the .sdm file is not located in the root web application directory, include its location relative to that directory.

fieldFormatter	<p>List the dimensions, key descriptions, and text to display underneath each result (e.g., address, city, state, etc.) enclosed within formatting parameters. Formatting parameters can include styles defined via custom branding.</p> <p>To display a static text label (e.g. "Company"), enter the text itself.</p> <p>To display a key description field (e.g., the specific customer name, address, etc.), enter {desc#} in which # is the number of the description for the geo-coded key based on the order listed in the configuration report where 1 is the first description for the key. For example, in the following configuration report, CustName is {desc1}.</p> <p>To display a dimension field (e.g., a specific company), enter {dim#} in which # is the number of the dimension for the geo-coded key based on the order listed in the configuration report where 0 is the first dimension for the key. For example, in the following configuration report, Company is {dim0}.</p>
----------------	---

Example configuration report used to find ID numbers

```
[ 0 ] 'Customer' ['Customer'] (member count: 6366)
```

```
  Cube Affinity:
```

```
Sales, Depr, WorkOrders, AssetPlacement, CMA, ActiveCust, AR, CoordData
```

```
  Attributes:
```

```
    Key Master Fields:9
```

```
      Host Code Width:5
```

```
      Host Code Type: Numeric Zero
```

```
      CustName (30)
```

```
      CustAddress (28)
```

```
      CustCity (23)
```

```
      CustState (2)
```

```
      CustZip (5)
```

```
      CustContact (25)
```

```
      CustPhoneNumber (14)
```

```
      CustStatus (8)
```

```
< 0 > 'Company' ['Company'] (3,3) Len: (15,11)
< 1 > 'Region' ['Region'] (13,13) Len: (16,14)
< 2 > 'Sales Manager' ['Sales Manager'] (6,6) Len: (25,17)
```

Example location results

For example, the fieldFormatting parameter in the previous .json file example would produce the following results:

```
S. NEWBURG DIST. # 245BF
Company
Company One
Address
W CHAMBERS RD.
City
ELMIRA
State
NY
```

4. Direct users to turn on location services.

In the Settings area of the mobile app, users should turn on location services.



5. Enable location maps (optional).

You can optionally enable mapping of nearby locations. When this feature is enabled, a map of the nearby locations will display in addition to the location list. This feature requires Salient Dashboards Version 7.0+ and access to a WMS (Web Map Service) server. In addition, you must add the following section to the mobile configuration file (.json). In general, you should modify the wmsUrl property to point to the correct WMS server and can then use the remaining settings shown below.

Example mobile configuration file (.json)

```
"locationMapLayers": [{
  "layerType" : "base",
  "geoInfo" : {
    "wmsUrl" : "https://{geo_server_domain}/geoserver/Basemap/wms",
    "parameterInfo" : {
      "noWrap": true,
      "bounds": [
```

```

        [-90, -180],
        [90, 180]
    ],
    "tiled" : true,
    "tilesorigin" : "-180,90",
    "version" : "1.1.0",
    "srs" : "EPSG:4326",
    "format" : "image/png",
    "transparent" : true,
    "layers" : "Basemap"
}
}
}]

```

Notes:

- locationMapLayers is a root property; it does not go underneath the locConfig property that is used for setting up other location panel settings.
- noWrap and bounds - These are recommended to prevent the world map from repeating if you zoom out. They can be omitted if you want the world map to repeat.
- The settings shown here are recommended. Additional leaflet configuration settings may be used by including them in the geoInfo parameterInfo property.
- The example shown here uses one layer. Multiple layers can be included by defining each one within an opening and closing brace { } and then separating layer definitions with commas.

Total/average setting

The mobile configuration file allows you to specify the following setting in addition to location services and custom branding. You may need to create this file if you haven't already. See the topic ["The mobile configuration file"](#) for information about the required file name and location.

```
{
  "alwaysShowGridTotalsAndAverages": true
}
```

Optionally, set this parameter equal to "true" to always show show total and average rows in applicable widgets in the mobile app, even if these rows are hidden in browser-based dashboards. Omit this parameter or set it to "false" to show or hide totals and averages according to the dashboard's settings.

Pre-configured login settings

Using mobile device management (MDM) software, you can optionally push the following login information to mobile app clients to automatically populate these fields in the login page. Refer to the documentation on the MDM you are using for additional instructions. This feature is currently only available on iOS.

Key	Type	Description
serverUrl	string	URL of the Salient Dashboard web application
serverIndex	int	The index of the dataset you wish to connect to for the configured dashboard server. If you only have one dataset, then the serverIndex should be 0.
username	string	If specified, the username field will be populated with this value.
password	string	If specified, the password field will be populated with this value.
language	string	The mobile app will initially load with the specified language. Supported options include: chinese, english, german, japanese, portuguese, and spanish.

Design layouts within the mobile app

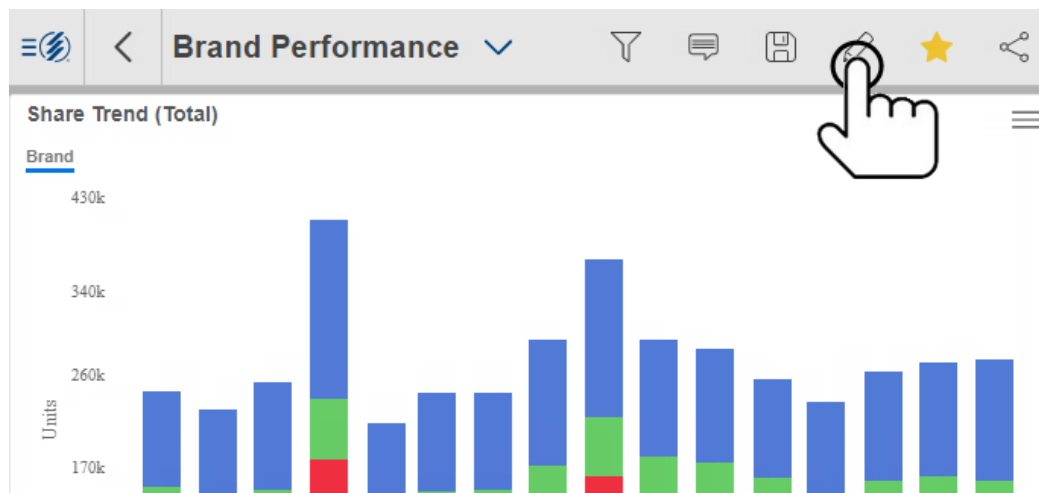
If your organization has installed Salient Dashboards Version 7.80 or higher, the following procedure may not be necessary because Dashboard Designers can arrange widgets in the dashboards browser application. If you have not upgraded to Salient Dashboards Version 7.80, your organization cannot create mobile layouts in the dashboards browser application; instead, you can create a layout within the mobile app itself (see the following instructions).

If a dashboard does not have either type of layout (designed in browser application or mobile app), the mobile app will display a single pane with additional widgets available via swipe.

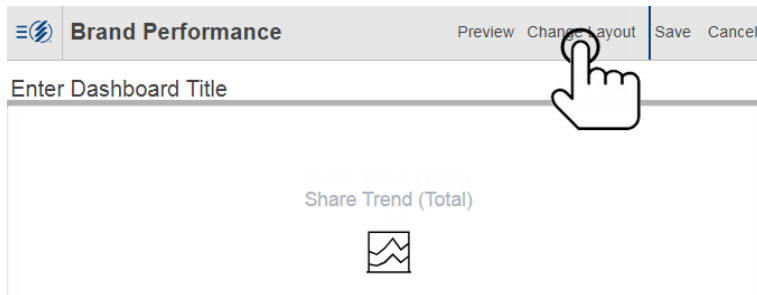
To create a layout within the Salient mobile app

This procedure requires rights to save dashboards within the category. In other words, a user must be a Power Viewer or Dashboard Designer to modify the layout of a private dashboard. Modifying the layout of a published dashboard also requires "publish" rights. In version 7.80 and higher, the edit feature is not available in the mobile app if the dashboard already has a layout defined in Salient Dashboards edit mode (i.e., "Show This View in App" setting is on.)

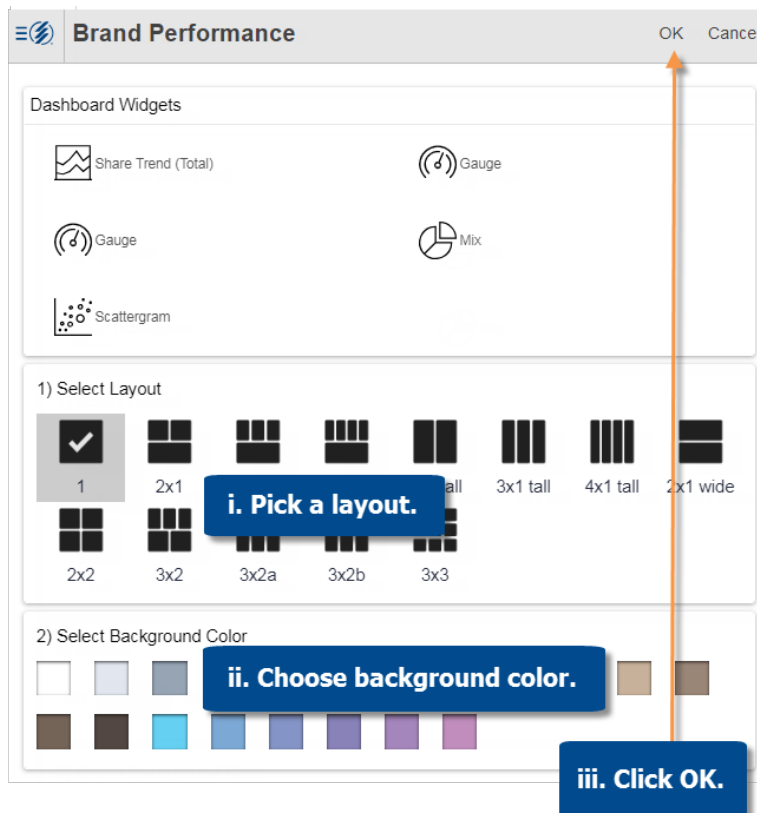
1. Open the dashboard and tap the edit button.



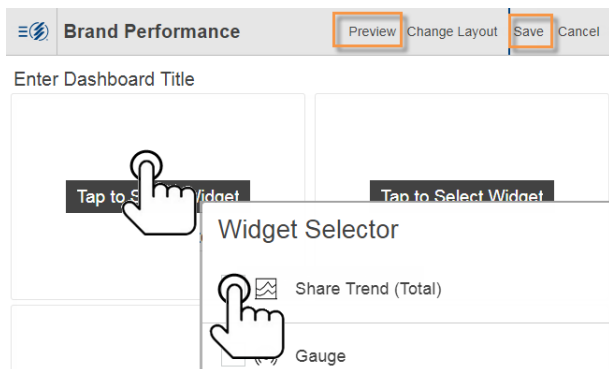
2. Tap on Change Layout to open the wizard.



3. Select layout options in the wizard. When choosing the number of panes, keep in mind that you can show multiple widgets per pane. In this case, viewers will be able to scroll to the next widget.



4. Select widgets to show in each pane. Tap a pane; then, select the widget(s) to show. If multiple widgets are selected for a pane, they will be available via swipe. Repeat for each pane; then save.



Mobile dashboard links

A mobile dashboard link allows a user to launch the mobile app and go directly to a dashboard. Mobile dashboard links can be saved for easy access to specific dashboards and shared with users via email, text messages, or other methods. Optional parameters can be included in the link to apply a filter or select a specific location in the location panel.

To determine the URL of a mobile dashboard link

Option 1

Use the Share feature within the mobile app to determine the mobile URL, which can be copied from the resulting email message.

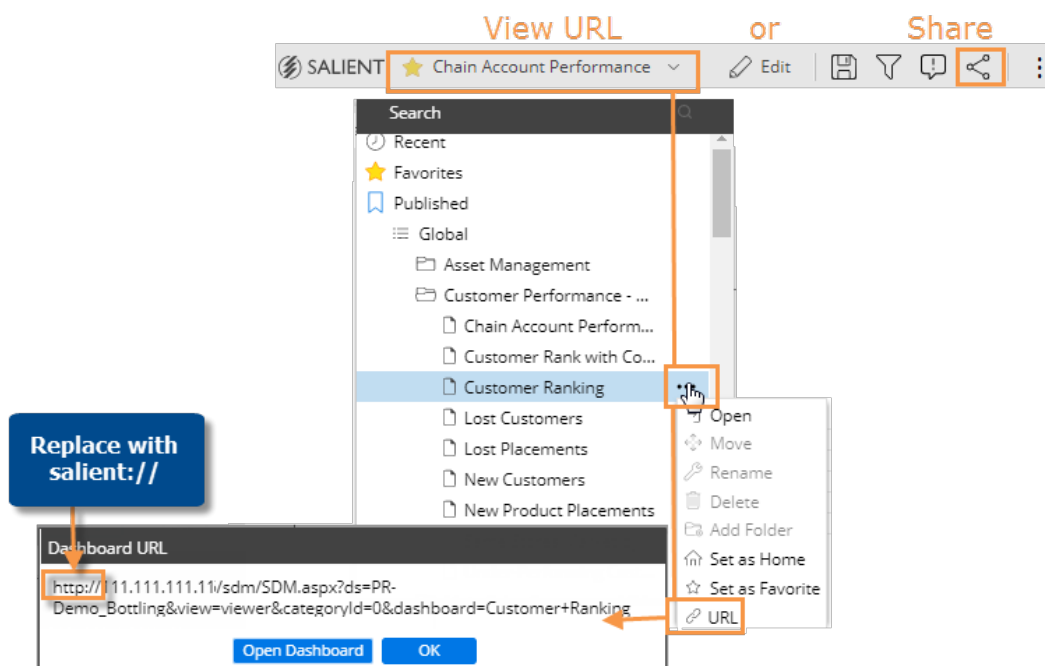


Option 2

Create the mobile URL based on the URL of the corresponding browser-based dashboard. In general, the URL for a mobile link is the same as the URL for a browser-based dashboard except that the prefix is `salient://` instead of `http://`.

You can obtain the URL of the browser-based dashboard by selecting the URL option on the dashboards menu or using the Share feature of browser-based dashboards.

Once you have obtained this URL, replace `http://` with `salient://` to open the dashboard in the mobile app. For a secure URL, you should replace `https://` with `salient://` and append `&secure` to the end of the URL.



Parameters

If you wish, you can add or modify parameters. Replace any spaces with "+" or "%20" (for example, Channel+Comparison). Omitting the dashboard identifier (dashboard or shareddashboard) will go to the home page rather than a specific dashboard.

Parameter	Explanation
ds	This is the name of the dataset. If omitted, the link will attempt to open the most recent dataset accessed by the user.
view	The "view" parameter is ignored by the mobile app.
categoryId	This identifies the category of the dashboard when it is identified by name.
dashboard	This is the name of the dashboard.
shareddashboard	This is a dashboard identifier that is automatically assigned when the dashboard is shared in the mobile app.
filters & filterValues	Refer to "Filters in mobile dashboard links".
locationSelectionHostCode & locationSelectionName	Refer to "Locations in mobile dashboard links".

Basic examples

`salient://mycompany.com/SDM/SDM.aspx?ds=Bottling`

This link would open the mobile app to the home page.

`salient://mycompany.com/SDM/SDM.aspx?
ds=Bottling&dashboard=Channel+Overview`

This link would open the Channel Overview dashboard in the mobile app.

`salient://mycompany.com/SDM/SDM.aspx?sharedashboard=MGPFY`

This link would open a dashboard that was automatically given the MGPFY identifier when it was shared in the mobile app.

Filters in mobile dashboard links

You can add parameters to a mobile dashboard URL to automatically filter the dashboard when it is opened. You can filter by one or more members of one or more dimensions and/or keys. This method of filtering affects all applicable widgets in the dashboard.

To apply a filter via a dashboard URL

Add the following parameters to the end of the dashboard URL.

`&filters=key.dimension,key.dimension`

- *key* is the internal name or id of the key associated with the dimension by which you want to filter.
- *dimension* is the internal name or id of the dimension.
- To filter by a key member, list the key rather than the key.dimension name. For example, `&filters=Customer` would filter on one or more members of the customer key.
- To filter by multiple keys and/or dimensions, include them as a comma-separated list.

`&filterValues=member_code,member_code|member_code,member_code`

- *member_code* is the code of the dimension member or key member by which you want to filter data.
- To include data for multiple members of a dimension or key, list the members' codes separated by commas.
- When filtering by multiple dimensions or keys, separate each list with a pipe (|).
- A key code must conform to the exact length and format specified in the dataset; therefore, padding may be necessary. Replace any spaces with "+" or "%20".
- A dim code will be automatically padded on the right side if the code does not match the required length. Additional spaces are not necessary in this situation.

Examples

```
salient://mycompany.com/SDM/SDM.aspx?
dashboard=MTD+vs+YAG&categoryId=0&filters=Customer&filterValues=11901
```

The resulting dashboard would be filtered by customer 11901.

```
salient://mycompany.com/SDM/SDM.aspx?
dashboard=MTD+vs+YAG&categoryId=0&filters=Customer.Region
&filterValues=01
```

The resulting dashboard would be filtered by customer region 01.

```
salient://mycompany.com/SDM/SDM.aspx?
dashboard=MTD+vs+YAG&categoryId=0&filters=Customer
&filterValues=11901,11227,11391
```

The resulting dashboard would be filtered by customers 11901, 11227, and 11391.

```
salient://mycompany.com/SDM/SDM.aspx?dashboard=MTD+vs+YAG&categoryId=0
&filters=Customer.Region,Customer.Channel&filterValues=01|20
```

The resulting dashboard would be filtered by customer regions 01 and also by customer channel 20.

Locations in mobile dashboard links

You can include a location parameter in a mobile dashboard URL to automatically select a member as a location. This results in the following:

- The location button at the top of screen shows the name or code of the member.
- The member is selected at the top of the location panel when opened.
- If you switch to a map, the selected member is represented by a red icon.
- All dashboards filter data by the selected member until the user de-selects it.

To select a location via a dashboard URL

Add the following parameters to the end of the dashboard URL. Replace any spaces with "+" or "%20" (for example, X+Marts).

```
&locationSelectionHostCode=member_code
```

- *member_code* is the host code of the key member you want to select as a location.
- A key code must conform to the exact length and format specified in the dataset; therefore, padding may be necessary.

`&locationSelectionName=display_name`

- *display_name* is a name to display in the location button and panel.
- This parameter is optional. If omitted, the location button and panel will display the host code.

Examples

```
salient://mycompany.com/SDM/SDM.aspx?
ds=Bottling&locationSelectionHostCode=11598
```

This link would open the mobile app to the home page with customer 11598 pre-selected in the location panel. The location panel and button would display the host code "11598."

```
salient://mycompany.com/SDM/SDM.aspx?
ds=Bottling&locationSelectionHostCode=11598&locationSelectionName=X+Marts
```

This link would open the mobile app to the home page with customer 11598 pre-selected in the location panel. The location panel and button would display "X Marts" instead of the host code.

```
salient://mycompany.com/SDM/SDM.aspx?
ds=Bottling&dashboard=Channel+Overview&locationSelectionHostCode=11598
```

This link would open the Channel Overview dashboard in the mobile app. Customer 11598 would be pre-selected as a location; therefore, the dashboard (and all other dashboards) would filter out data for all other customers.

Notify

Salient Dashboards can send automated notifications to mobile users based on dashboard data and custom business criteria. Notifications are interactive; users can click on the notification to open a dashboard showing the underlying data.

The Notify feature requires additional installation and configuration as explained in the *Salient Dashboards Installation and Configuration Manual*. Once the Notify feature is configured, Salient Dashboard users can set up notification rules and messages in the browser-based dashboards application. (Refer to the Salient Dashboards help for information.) Notifications are then automatically pushed to mobile devices and/or emailed when data meets the criteria. Salient mobile app users must allow notifications to use this feature.

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