

July 3, 2025

Salient Interactive Miner[™] Training Guide

Version 8.7



Limited warranty

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Getting Started

Log in


To start up and open a dataset

1. On the **Start** menu, select **Programs**, and then select **Salient UXT, Salient Interactive Miner**.

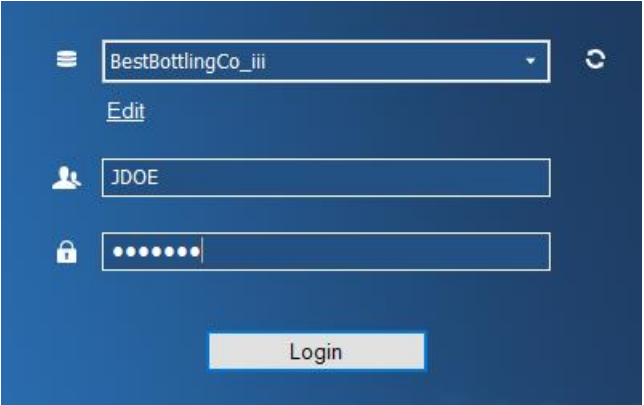
The login screen should appear.

If the server location(s) is not already configured, click on **Edit** to go to dataset server setup before proceeding.

2. From the  menu, select a dataset.

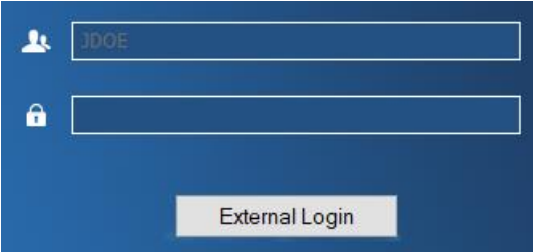
If you don't see the desired dataset, you might need to refresh .

3. For traditional login (i.e., user name and password entered directly into SIM), enter your user ID and password in the login screen. Then click **Login**.



For external/SSO authentication, click the **External 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**.

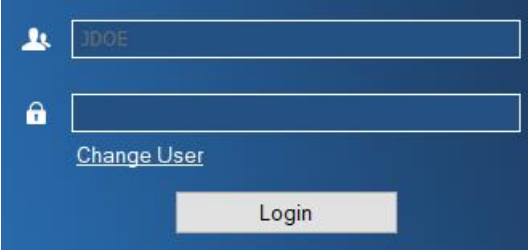
External/SSO authentication:



To start up and open a dataset

For LDAP login (i.e., machine login used for authentication), the user name and password entries are not needed. Simply click **Login**. If you wish, you can log in as a different SIM user (e.g., on a shared computer). In this case, click **Change User**.

LDAP:

A screenshot of the LDAP login interface. It features a dark blue background. At the top left is a user icon. To its right is a text input field containing the text 'JDOE'. Below this is another text input field, preceded by a lock icon. Underneath the password field is a link labeled 'Change User' in blue text. At the bottom center is a light gray button with the text 'Login' in dark blue.

Tips

For security reasons, we recommend exiting SIM (File, Exit) when you are finished.

Contact your system administrator if you don't know your user ID or password. Once you log in, you can change your password.

Passwords are typically case-sensitive, depending on your organization's security settings.

If you still do not see the dataset, it might not be running, or you may need to add it or select it in the list of dataset servers. Click **Edit** to manage the list of dataset servers.

If two or more datasets have the same name, SIM lists the IP addresses of their servers next to the dataset names.

When you exit, SIM saves user data and closes. This does not stop the UXT Server.

Overview of the screen

After you start up and [open a dataset](#) (see page 5), you should see a screen similar to the following:

Home, forward, & back

File menu

Ribbon control

Context panel

Analysis window

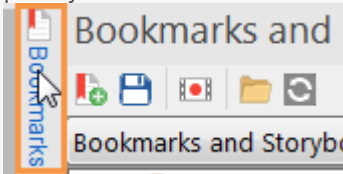
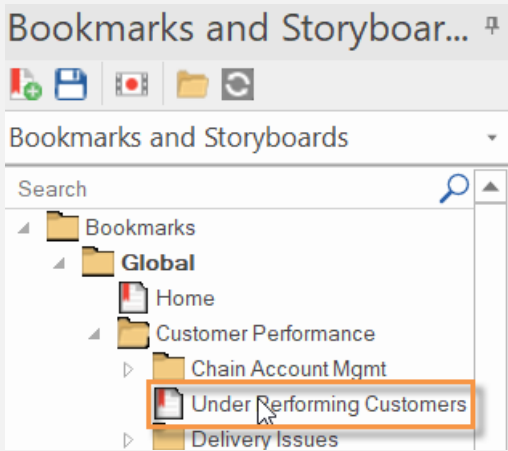

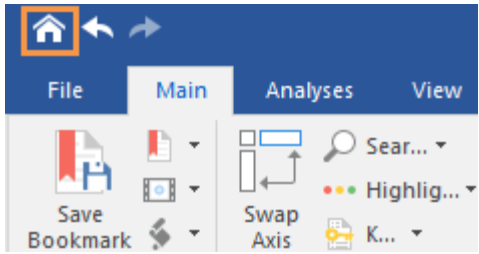
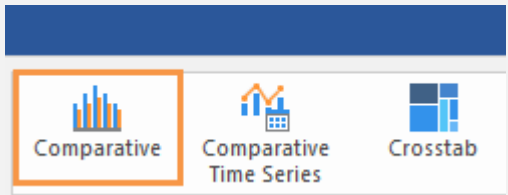
The screenshot displays the Salient Interactive Miner (SIM) interface. The top menu bar includes File, Main, Analyses, View, and Help. The File menu is open, showing options like Presets, Setup, Pointers, and Analysis. The Ribbon control is visible, with tabs for Table, % Change Bar Chart, and Actual Value Bar Chart. The Context panel on the left shows the Cube (Sales) and Group By (Channel, Chain, Package) options. The Analysis window on the right displays a table of data for Units Sold and Margin, comparing This, Last, and Diff values for various categories like Wholesale Clubs, Department Stores, and Dairy Stores.

	Units Sold				Margin		
	This	Last	Diff	% Chg	This	Last	Diff
Wholesale Clubs	39,275	15,576	23,699	152.15	\$145,299	\$41,474	\$103,825
Department Stores	31,138	23,398	7,740	33.08	\$199,684	\$114,129	\$85,555
Dairy Stores	26,085	21,681	4,404	20.31	\$199,084	\$132,924	\$66,160
All Othr On Premise	25,401	27,729	-2,328	-8.40	\$179,128	\$152,818	\$26,310
Hotels / Motels	24,939	21,413	3,526	16.47	\$151,788	\$106,520	\$45,268
Bars / Taverns	23,730	23,696	34	0.14	\$243,689	\$207,726	\$35,963
Clubs	18,778	18,071	707	3.91	\$158,549	\$135,317	\$23,232
Jails	18,071	18,071	0	0.00	\$122,831	\$92,224	\$30,607
Government Accounts	16,241	16,241	0	0.00	\$128,787	\$128,264	\$523
Garages/ Car Dealers	14,218	13,848	370	2.67	\$107,110	\$86,810	\$20,300
Rgn'l Chns OnPremise	12,422	11,890	532	4.47	\$55,701	\$42,883	\$12,818
S. Newburg Deli	8,547	8,374	173	2.07	\$26,045	\$18,474	\$7,571
S.Newburg FullSrv	2,711	2,700	11	0.41	\$25,240	\$21,633	\$3,607
Obeck Inc. Deli	1,164	816	348	42.65	\$4,416	\$2,776	\$1,640
5G Water	571	375	196	52.27	\$333	\$228	\$105
Premix	433	314	119	37.90	\$4,003	\$2,476	\$1,527
Sales Pr	161	127	34	26.77	\$117	\$73	\$44
120%GrND	1	0	1	100.00	\$0	\$0	\$0

- **File menu** – Select the file tab to open a menu with options to log into a dataset, export, change preferences, etc.
- **Home, forward, & back**– Navigate between views. In preferences, you can choose the home view and set back button options.
- **Ribbon control** – Includes tools to get to the desired information and customize the analysis window. The ribbon control can be minimized.
- **Context panel** - Lets you select the data to show in the analysis window (e.g., change the dates, select the By, add data fields, etc.).
- **Analysis window** – Shows a table or graph of the selected data. Each window has its own toolbar, breadcrumb path, and may include a quick access bar for grouping the data. You can open and arrange multiple analysis windows.

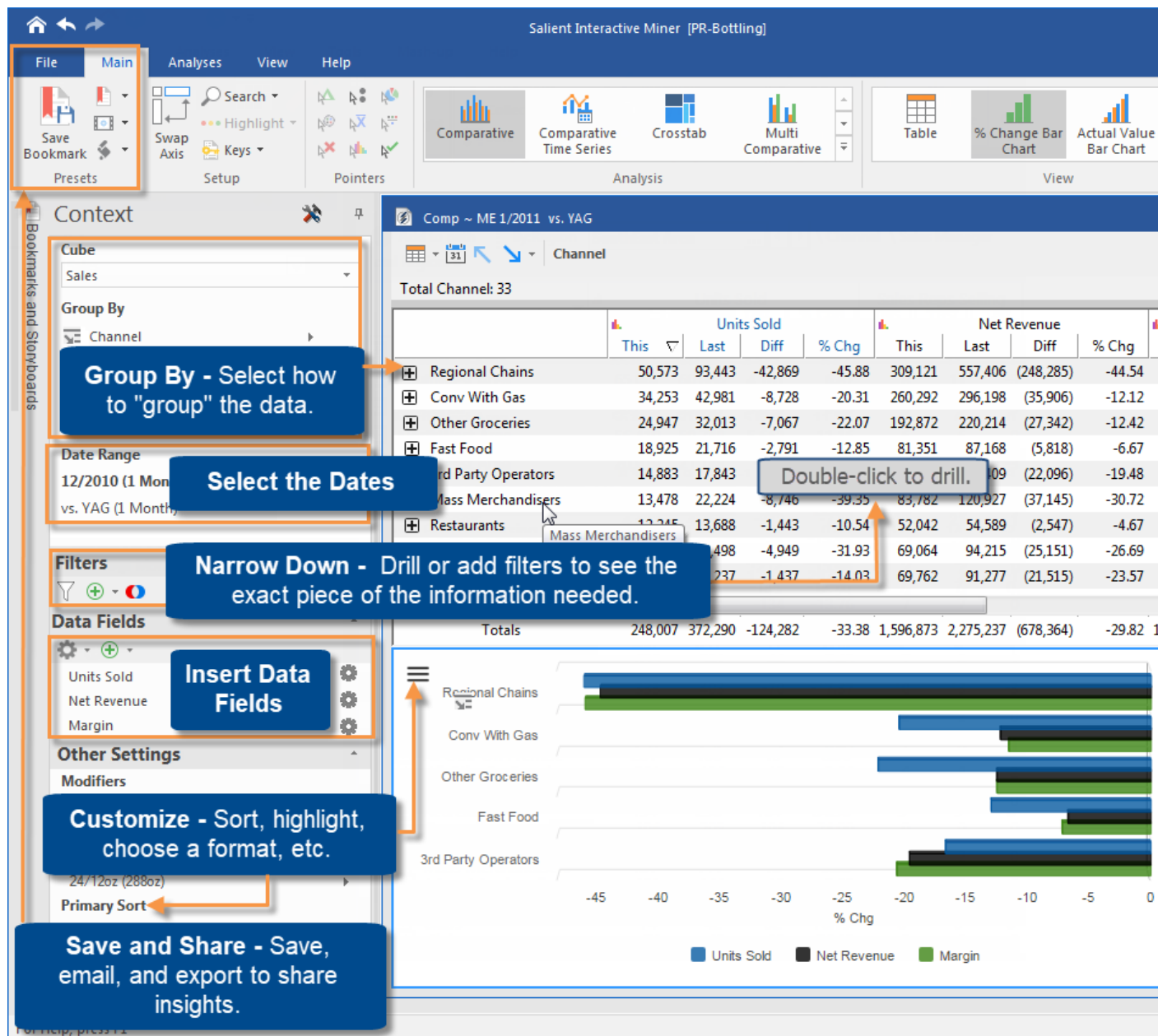
Select a starting point

SIM offers several options for choosing a starting point that allows you to survey and drill deeper.

Option	Explanation	
Use the startup bookmark	After logging in, the analysis window will show the startup bookmark or a default layout of data, depending on your preferences. You can use this startup view or open a different view (see below).	
Open a bookmark	<p>In the Bookmarks panel, click the name of a bookmark to open it.</p> <p>Tip: If the bookmark panel is on autohide, place your cursor over its tab to open it.</p>  <p>To search for a bookmark, type part or all of its name at the top of the panel.</p>	
Go to the home view	<p>Click  at the top of the SIM window to go to the home view.</p> <p>Tip: You can set the home view in preferences.</p>	
Start with a Comparative or choose another analysis	<p>The Comparative is a standard table or graph that compares several groupings of data for one or two date ranges. This may be a good starting point for investigation. SIM offers several other analysis types (see page 44), such as a trend, to answer different types of questions.</p> <p>To open a Comparative or other analysis, click the corresponding button on the ribbon control.</p>	

Basic steps to find actionable information


After selecting a [starting point](#) (see page 8), you can perform the following steps to dig deeper and find meaningful, actionable information. Refer to the appropriate sections in this document for more information.

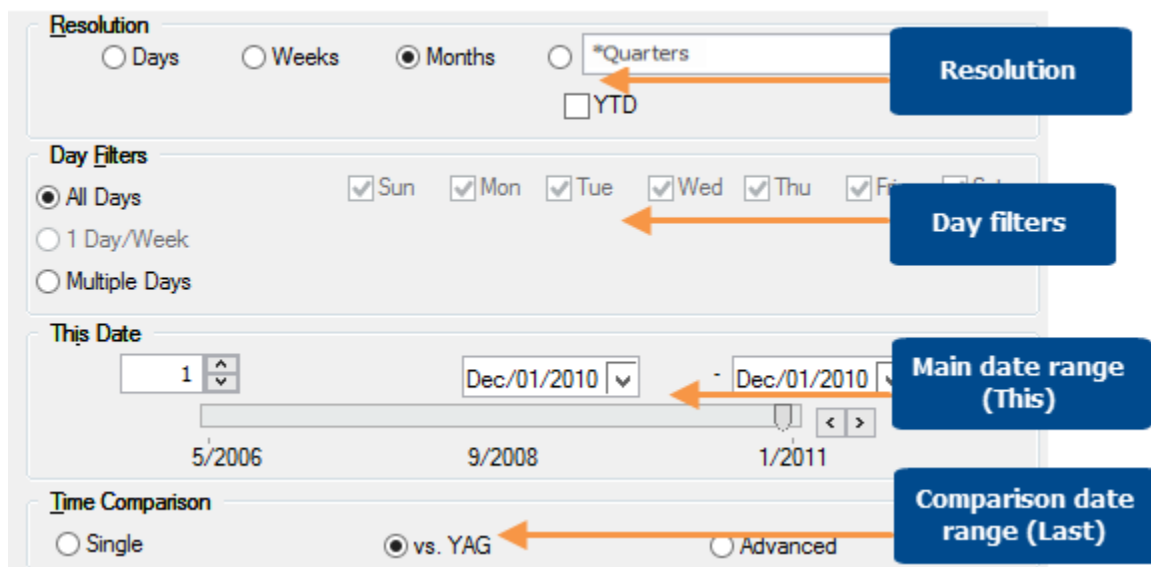
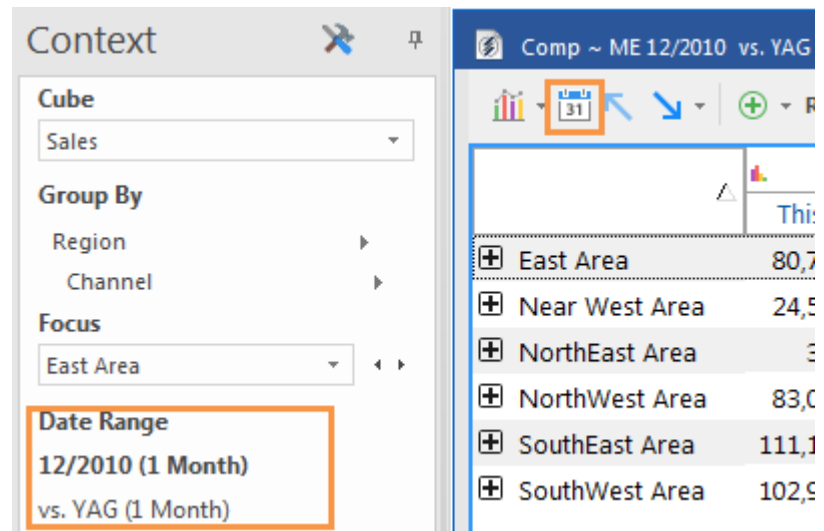


Select the Dates

You can change the dates or "timeframe" shown in any analysis. Many analyses (for example, Comparative Dimension Members) total data over the specified date range. Time-series analyses show data for each individual day, week, month, or fiscal period in the date range.

To select the date setup

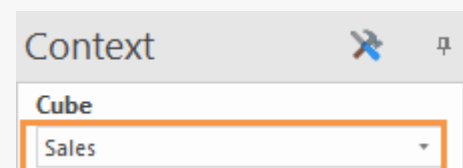
1. Click the  button in the analysis window toolbar, or click the Date Range area of the context panel.
2. In the dialog, choose from the following date settings.



Option	Explanation
Resolution (i.e. days, weeks, months, or customized periods, etc.)	<p>In the Resolution box, click the radio button of the units you want to use. Time-series analyses will show data for each unit of time separately. Other types of analyses widgets will total data for the units of time in the selected date range.</p> <p>If you choose Weeks, select a week-ending day (not available if your administrator has set a global week-ending day).</p> <p>If you choose Months or periods and you are <u>not</u> setting a time-series date range, you can check YTD to see data for the first of the year to the selected month or period.</p>
Main date range (This)	<p>In This Date box, set the main date range.</p> <ul style="list-style-type: none"> Ending date - <i>Option 1</i>) Drag the pointer on the date slide to the desired ending date. <i>Option 2</i>) Click the drop-down arrow beside the ending date and then pick the ending date from a calendar. Starting date: <i>Option 1</i>) Enter the number of dates to include in the date range. This will automatically adjust the starting date relative to the ending date. <i>Option 2</i>) Click the drop-down arrow beside the starting date and then pick the starting date from a calendar. This will automatically adjust the number of dates. <p>Tip: Time-series analyses require at least two dates.</p>
Day filters (optional)	You can 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)	<p>In the Time Comparison box, choose one of the following (availability depends on analysis type):</p> <ul style="list-style-type: none"> Single shows data for This date range only. vs. YAG compares data with the same time one year earlier. Advanced lets you select a different date range for comparison. After you click Advanced, set the Last date range using the options in the Last Date box.
Comparison for incomplete timeframes	If you are comparing months or periods that are incomplete (or may be incomplete when viewed) to a previous date range, then you should select a MTD/YTD Calculation Method under Modifiers to determine how to select the dates in Last date range.

Tip:

If the dialog does not show the desired date range, you may need to change the data cube of the selected analysis window to one that includes those dates.



Group By and Focus

Group By

The Group By controls the following:

- How data is grouped at the highest level (1st By).
- The order of dimensions when drilling down (i.e., drill order).
- How members can be expanded into additional levels of data (2nd By, 3rd By, etc.)—in either a standard table or [flat view](#) (see page 51).

Context

Cube

Sales

Group By

Region

1st By

SalesRep

2nd By, 3rd By, 4th By, etc.

KeyAccount

Package

Brand

STANDARD TABLE

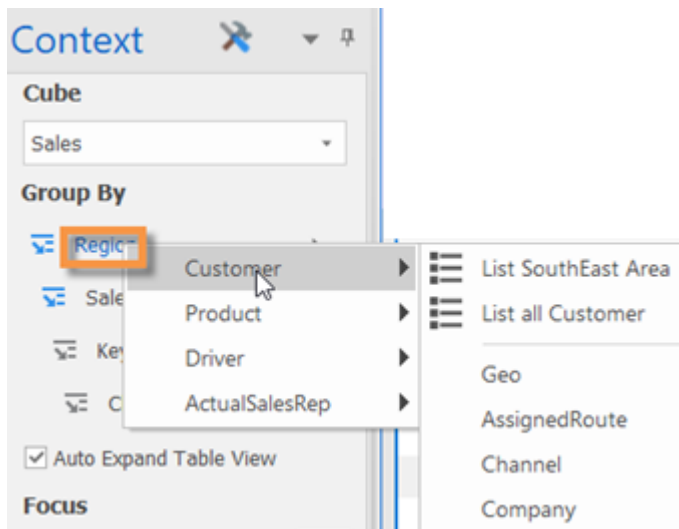
	This ▾	Last	Diff	% Chg
SouthEast Area	67,473	55,474	11,999	21.63
SouthWest Area	58,964	52,127	6,837	13.12
Papis, M...	17,098	13,635	3,463	25.40
S.Ne...	3,605	2,819	786	27.88
Lind...	2,954	1,805	1,149	63.66
1	2,775	1,658	1,117	67.37
2	127	30	97	323.33
12PkCnND	23	10	13	130.00
20Oz NR	16	48	-32	-66.67
Cans	9	35	-26	-74.29

FLAT VIEW

	1st By	2nd By, 3rd By, etc.	This ▾	Last	Diff	% Chg
	SalesRep	KeyAccount				
SouthEast Area	Office-Lasoski	Serv-Rite	8,712	5,932	2,780	46.86
East Area	Vasser, Jimmy	All Others	6,288	6,672	-384	-5.76
SouthEast Area	Brack, Kenny	All Others	6,149	7,103	-954	-13.43
DFLT_96	da Matta, Cristian	S.Newburg Dist-North	6,047	4,289	1,758	40.99

To change how the data is grouped

1. Click on the analysis window and then click under **Group By** in the context panel. Click on the level you want to change. By default, the context panel shows the 1st By and 2nd By and may show additional levels if you have expanded members.
2. In the first menu, select the key that the dimension categorizes.
3. In the next menu, select the specific dimension (i.e., how to group the data).



Tips:

Alternate methods of changing the by are available:

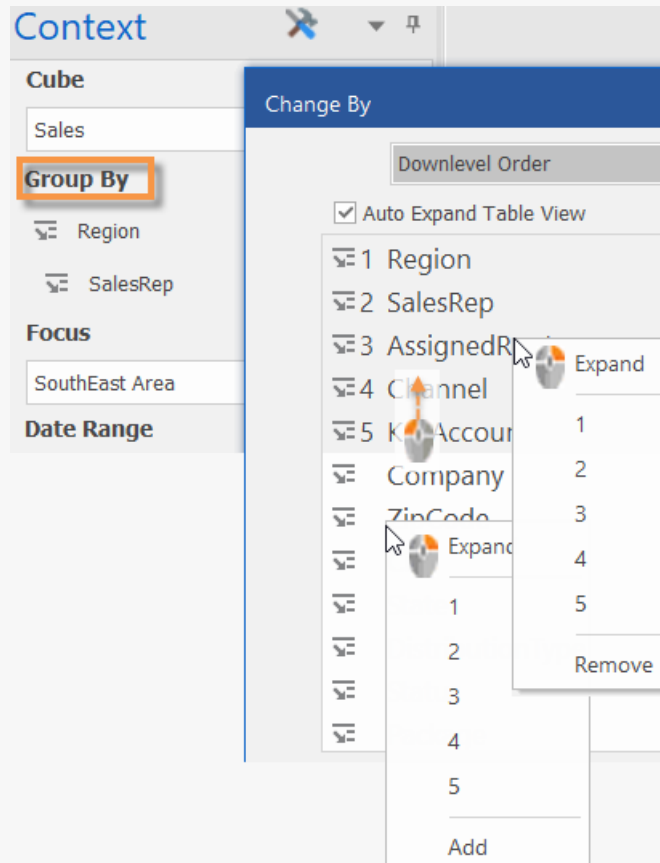
- To change multiple By levels at once (i.e., the drill hierarchy), click **Group By** in the context panel to access the Change By dialog. Then, use one of the following methods:

Drag and drop a dimension to a numbered position. Repeat to rearrange more dimensions.

OR

Right-click on a dimension to select from a menu.

By default, you can define up to five levels of dimensions. To define additional levels, right-click on a non-numbered dimension and select **Add**. To remove a level, right-click on a numbered dimension and select **Remove**.





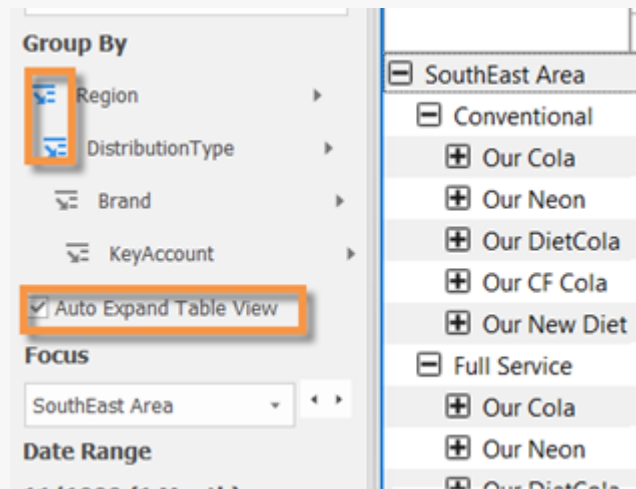
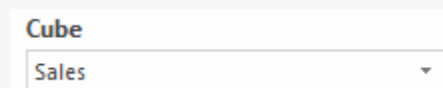
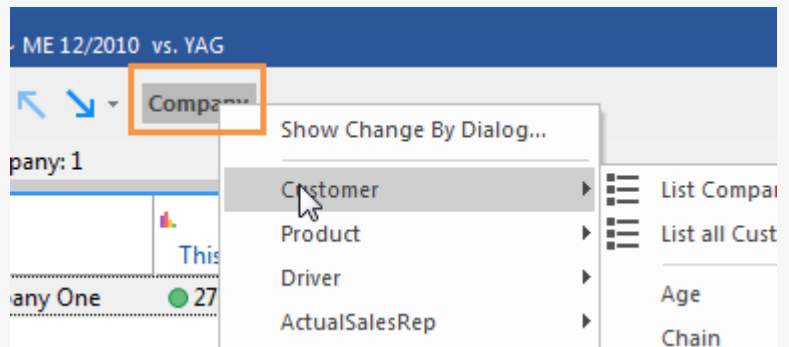
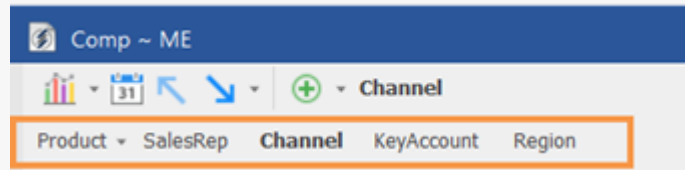
Tips:

- A quick access bar allows you to change the By with a single click (if the bar is turned on and configured). Left-click on a button to select the 1st By; right-click to select the 2nd By.
- You can use the breadcrumb path above the analysis to change the By.

These settings control the downlevel order in the current window. The default downlevel order for new windows can be set in preferences.

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

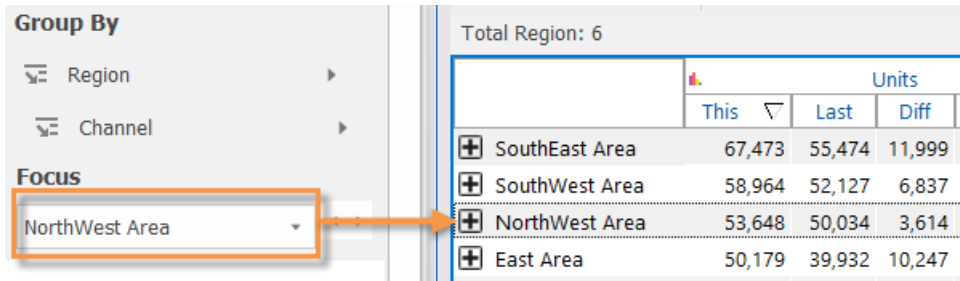
To expand an individual member to see its data grouped by the next level (i.e., 2nd By), click the  button beside it in a table. To auto-expand all members of a dimension to the next level, click the  button beside it and turn on the **Auto Expand Table View** option in the context panel.



Focus

Focus in comparative analyses

On an analysis comparing multiple dimension members at once (for example, Comparative Dimension Members), the row or column of the focus is outlined, and you can compare the focus to other dimension members.

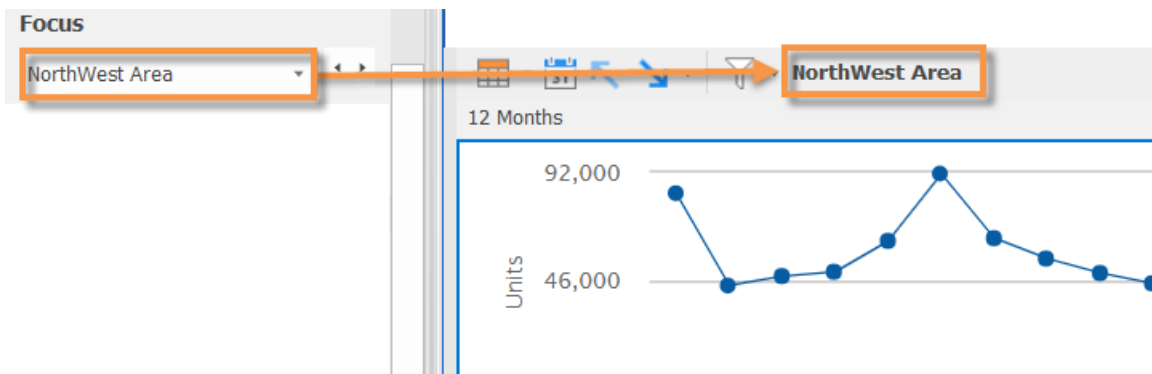


The screenshot shows a 'Group By' panel on the left with 'Region' and 'Channel' selected. The 'Focus' dropdown is set to 'NorthWest Area'. An orange box highlights the 'Focus' dropdown, and an orange arrow points from it to the 'NorthWest Area' row in the table. The table has a header 'Total Region: 6' and a sub-header 'Units' with columns 'This', 'Last', and 'Diff'. The data rows are:

	This	Last	Diff
SouthEast Area	67,473	55,474	11,999
SouthWest Area	58,964	52,127	6,837
NorthWest Area	53,648	50,034	3,614
East Area	50,179	39,932	10,247

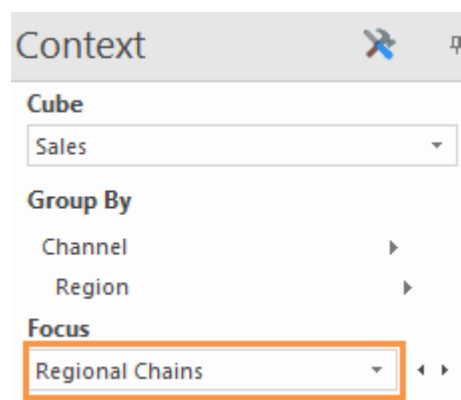
Focus in non-comparative analyses and key lists

Other types of analyses, such as time-series, Scattergram, P&L Format, key lists, etc., only show data for the member in focus; therefore, you should know what the focus is and how to change it. You can focus on all or the average of dimension members.



To change the focus

1. Click the focus drop-down in the context panel.



To change the focus

2. Select the new focus from the drop-down menu or dialog. (A drop-down opens if the dimension has just a few members; a dialog opens if the dimension has many members.)

Change Focus

Members 33 [Checked (1)]

Alphabetically

- ☐ Bars / Taverns
- ☐ Beverage Centers
- ☐ Churches
- ☐ Clubs
- ☐ Colleges
- ☒ Conv - NoGas
- ☐ Conv With Gas

☐ Include All Channel(s)

☐ Include All Channel(s)

Checked

Uncheck All

Tips:

If you select more than one member by checking boxes in the Change Focus dialog, SIM will filter out data for all other members. This is also referred to as "checkbox filtering."

In non-comparative analyses (e.g., time-series), you can look at the total or average of all dimension members by selecting the All or Avg option at the top of the dialog.

Change Focus

Members 35

Alphabetically

☐ [All Channel(s)]

☐ [Avg Channel(s)]

In comparative views, you can click on the row, column, or item in the analysis window to change the focus.

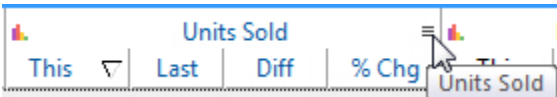
	This	Net Rev
		Last
Regional Chains	\$6,780,202	\$6,932,000
Conv With Gas	\$4,057,933	\$3,777,000
Other Groceries	\$5,685,000	\$3,049,000
Mass Merchandisers	\$1,795,095	\$1,754,000

Insert Data Fields

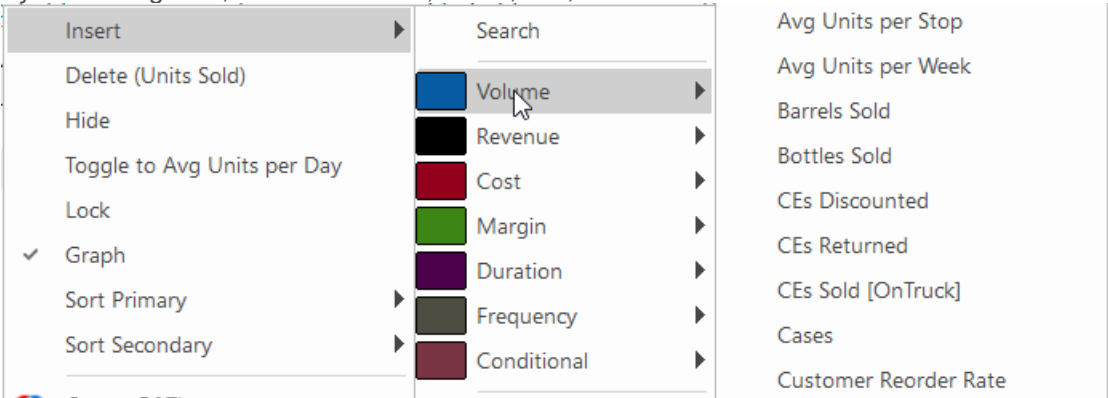
In key lists and most tables, you can insert data fields, which are sometimes referred to as "metrics" or "measures."

To insert a data field

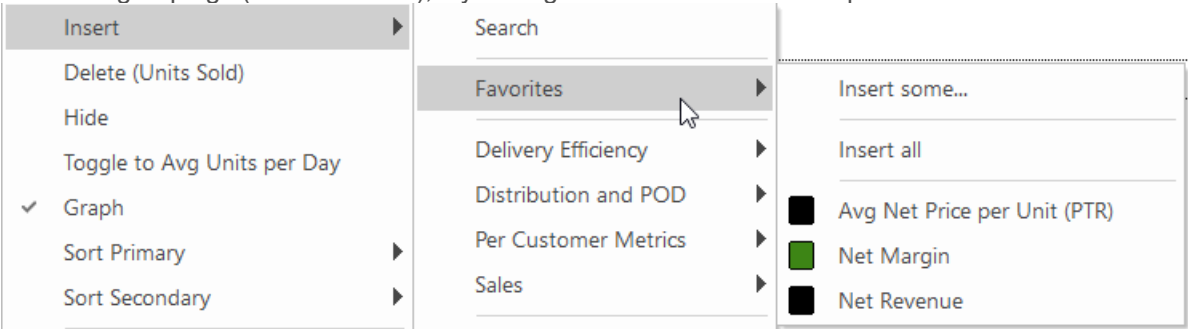
1. Place your cursor over the column heading just before the place where you want to add the data field.
2. Click the tools icon ≡ to open the pop-up menu.
3. On the pop-up menu, select **Insert**.
4. Select the data field from the menus. These may be organized the following ways, depending on your data field group preferences:



- By data categories, such as Volume, Costs, etc., which are based on schema definitions.



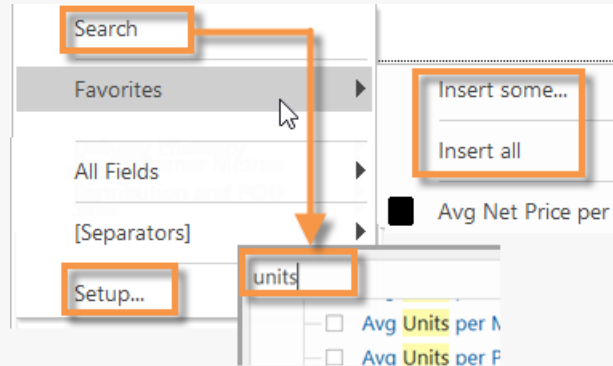
- By data field groupings, which may include favorite data fields, if they are selected in preferences, and logical data field groupings (such as Sales), if your organization has set them up.



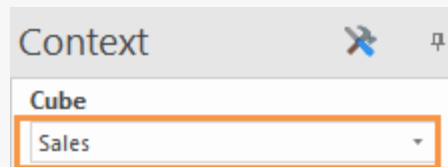
Tips


You can select the data fields directly from the menus or use the following options:

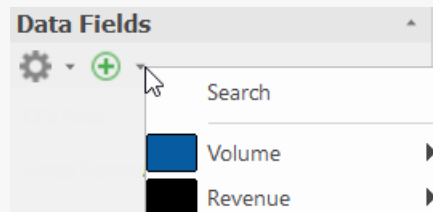
- **Search** for a data field. This option will take you to a dialog where you can enter search criteria.
- Select **Insert some** or **Insert all** to Insert multiple data fields or all data fields from the same category or group.
- Select **Setup** to access the Insert Data Types dialog, which provides more options, such as percent change, difference, and mix columns.







If you don't see the data field you want to insert, you may need to switch to another data cube.



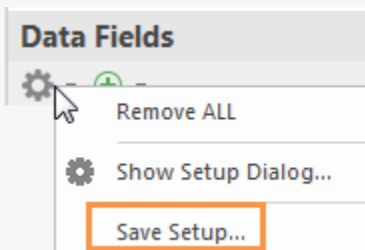
You can also insert data fields by clicking the  button in the Data Fields section of the context panel.



The Separator options on the Insert menu let you separate sets of data fields for easier viewing. The dash and equal signs are only available when viewed as rows.

	Units Returned	-12
	Avg Units per Day	228
<hr/>		
	Gross Revenue	\$26,929
	Net Revenue	\$21,579

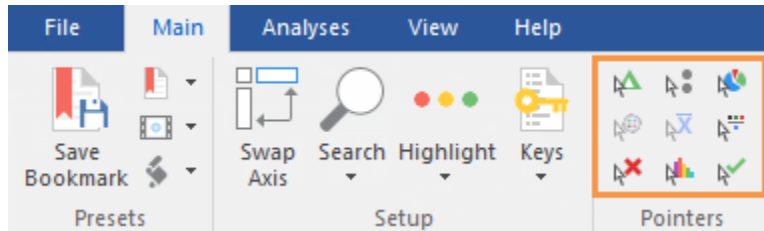
If you want to reuse a layout of data fields, you can save it as a setup.



In [key lists](#) (see page 55), you can also insert properties (name, address, etc.), dimensions (channel, sales rep, etc.), and rank.

Show variance, mix, and other computations

Some of the pointers, located in the Main tab, allow you to add variance, mix, and other computations to a table of numbers.



Button	Explanation
Delta	For any data field, this button inserts the difference (Diff) and percent change (% Chg) between date ranges, or between actual values and budgeted goals. To add the difference/change percent between Last date range and This date range (This-Last), click the main data field heading, or to add the difference/percent change between any other values, click the appropriate subheadings in the order of the formula (e.g., This-Budget). You can also add the difference between average per period columns.
Index	This button lets you index members to a base or standard for one or more data fields. After activating the pointer, click the base member(s) and then the data field.
Mix	This button adds percent of the total (mix) contributed by each dimension member in a Comparative Dimension Members numbers view, each key member in a key list, or each unit of time in a Normal Trend or Comparative Time Series analysis. You cannot add mix for fields calculated with multiplication or division (such as per unit fields)SUM function.
Average Per Period	This button inserts the average per unit of time (per day, week, month, or period). For example, if you are looking at three months of data, this pointer will allow you to see monthly averages across the date range.


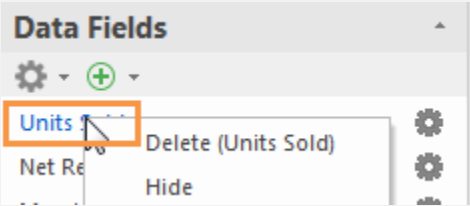
To add variance (delta), mix, or average per period

1. Click on the pointer button.
2. Click on a column heading.
3. When you are done using the pointer, click on the pointer button again or press **Esc** to turn it off.

Units Sold		Units Sold		Units Sold	
This	Last	This	Last	Diff	% Chg
250,631	249,531	250,631	249,531	1,100	0.44
208,713	215,326	208,713	215,326	-6,613	-3.07
203,279	197,626	203,279	197,626	5,653	2.86
187,051	196,730	187,051	196,730	-9,679	-4.92

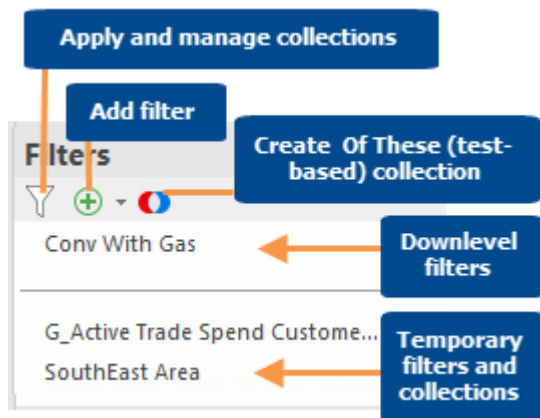
Delete a data field

If you have setup management rights, you can delete a data field.

Option	Explanation
Delete Pointer	<p>Click the Delete Pointer  (located in the Pointers section of the main ribbon control).</p> <p>Click the headings of the data fields you want to delete.</p> <p>Press Esc or click the Delete Pointer again to turn it off.</p>
Data Fields area of context panel	<p>Click the data field name in the Data Fields area of the context panel.</p> <p>In the menu, select Delete.</p> 
Double-right-click	Double-right-click the heading of the data field.

Filter

As you ask questions, you'll likely want to narrow down or "filter" on subsets of the data. The **Filtering** area of the context panel shows the filters for the selected analysis window and lets you add or remove filters. Several methods are available for filtering.



Tip: You can click on any filter in the context panel to change it or double-click to remove it.

Drill

When you drill down, the selected member(s) becomes part of the path, all other data is filtered out, and the data is grouped by the next dimension in the drill order.

The screenshot shows the application interface. On the left, the 'Filters' panel has 'East Area' selected. Below it, the 'Data Fields' panel shows 'Units Sold' and 'Margin'. On the right, a data table displays 'Units Sold' data for various categories. The table has columns for 'This', 'Last', and 'Diff'.

	This	Last	Diff
All Others	16,587	17,340	-753
Variety North	8,073	5,820	2,253
E N N,Inc.-South	7,411	7,849	-438
Obeck Inc. South	4,976	6,153	-1,177
Lindley NE	4,303	3,858	445
Dilbert's	2,970	916	2,054

You can use either of the following methods to drill down.

To drill on a single member

1. [Group the data](#) (see page 12) by the dimension on which you want to drill.
2. Double-click on the row, bar, pie slice, etc., representing that member.

SIM adds the member to the path and filters out all other data. The data is then grouped by what was previously the 2nd By.

Tip: If you want to select the next By (rather than using the 2nd By), you can click the drop-down arrow beside the Downlevel button:




Tip: You can also click the Downlevel button or arrow to drill.

	This	Last	Diff	% Chg
SouthEast Area	69,324	64,719	4,605	7.12
SouthWest Area	65,067	60,886	4,181	6.87
East Area	55,410	50,748	4,662	9.18
NorthWest Area	56,410	50,748	5,662	11.16
Near West Area	20,919	21,148	-229	-1.08
NorthEast Area	289	295	-6	-2.03

Double-click to drill

To drill on multiple members

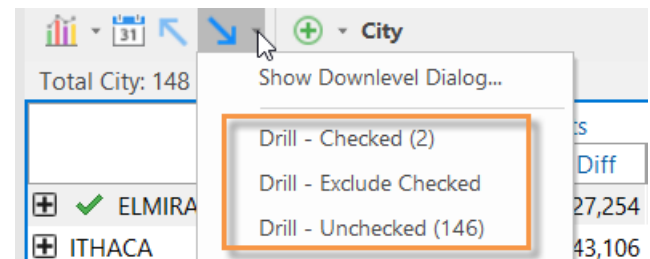
1. [Group the data](#) (see page 12) by the dimension on which you want to drill.
2. Use the check pointer  to checkmark the members.

Tip: Keyboard shortcuts are available for the checkmark pointer. Press Ctrl to checkmark individual members or Shift to select a range of members.

	This	Last
ELMIRA	641,344	614,091
ITHACA	512,739	469,631
CORTLAND	355,326	347,254
CORNING	330,978	314,911
SAYRE	291,165	283,241
HORSEHEADS	195,217	189,041
BATH	229	175,841

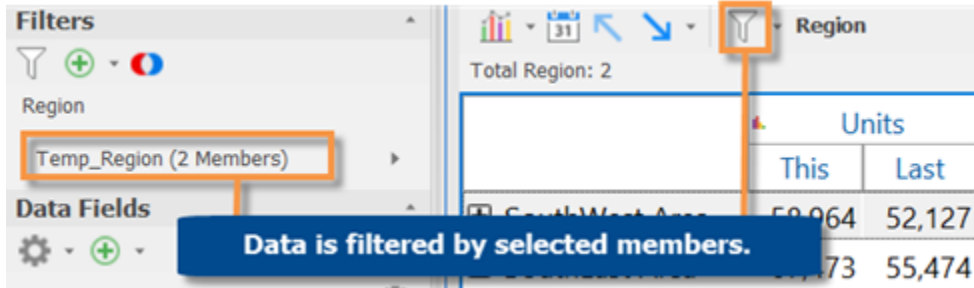
3. Click the drop-down arrow beside the Downlevel button at the top of the analysis window:
4. Select an option from the menu.

SIM turns on a temporary collection as a filter. The data is then grouped by what was previously the 2nd By.



Add a filter

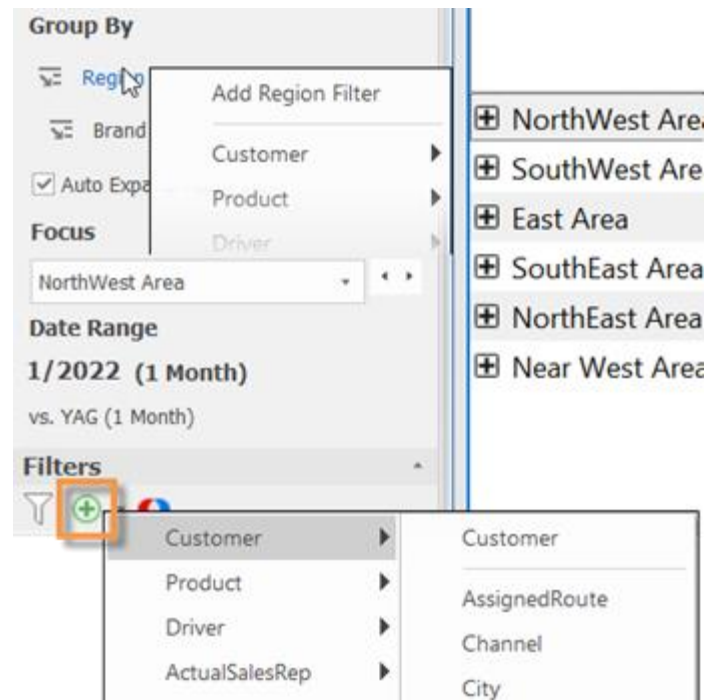
You can add filters to view any subset of the data. Using this method, the selected member(s) do not become part of the drill path; they are simply turned on as a filter. In addition, the By dimension does not change.



To add a filter

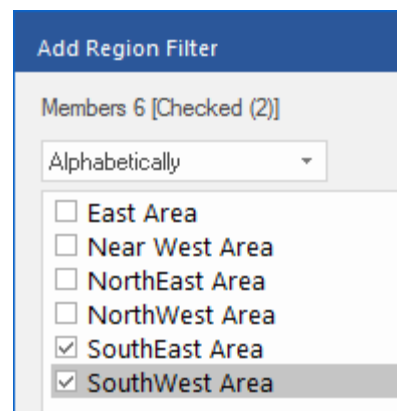
1. Click the analysis window to select it.
2. Under **Filters** in the context panel, click the button.
3. In the menu, select the key and then the dimension by which you want to filter the data.

Tip: If the data is grouped by the dimension (e.g., 1st By or 2nd By), you can click on its name in the context panel and choose **Add Filter** for faster selection.



4. In the dialog, place a checkmark next to the member(s) you want view.
5. Click **OK**.

Tip: This method of filtering creates and turns on a temporary collection if you select multiple members.



Collections

Collections are saved sets of members that you can use to filter the data. A collection can be created by selecting members or creating a test (Of These) to identify members based on criteria. Multiple options are available for turning on a collection.

Filter data by a collection

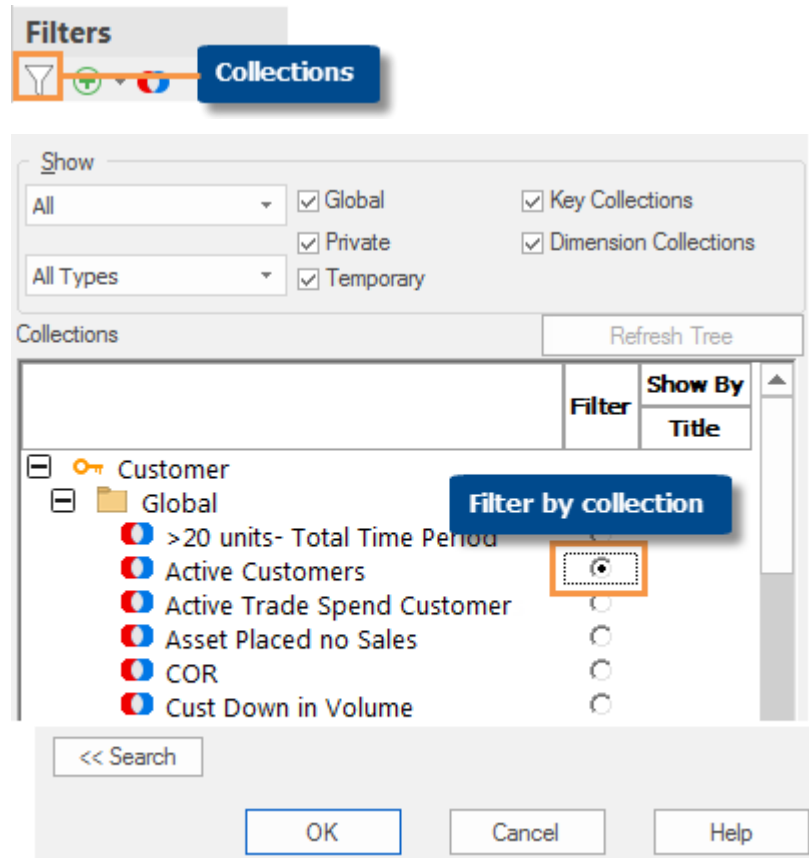
You can apply a collection to filter the data. If you wish, you can filter by multiple collections at a time.

	Units Sold			
	This	Last	Diff	% Chg
Regional Chain	15	13,562	18.39	
Conv With S	8	1,323	4.71	
Mass Merchandisers	23,893	18,932	4,961	26.20
Other Groceries	20,611	19,984	627	3.14
3rd Party Operators	14,376	11,495	2,881	25.06

To filter by a collection

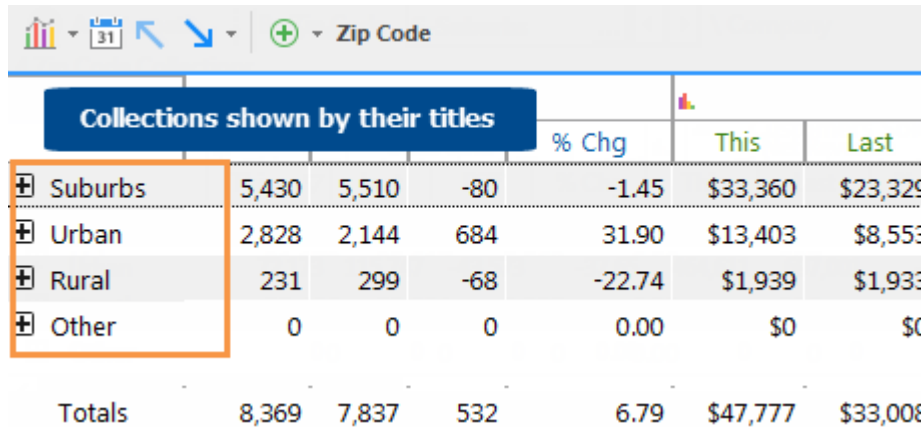
1. In the Filtering area of the context panel, click the button.
2. In the Collections tree, expand the key or dimension and category (global, private, etc.) of the collection you want to turn on.
3. Click the **Filter** radio button beside the collection. Dynamic collections (Of These) have the symbol beside them.
4. Click **OK**.

Tip: Normally, turning on a collection shows data for only the members of the collection. If the **Exclude selected members** option is on for the collection, filtering by the collection shows data for all members except the members of the collection.




Show a collection by its title

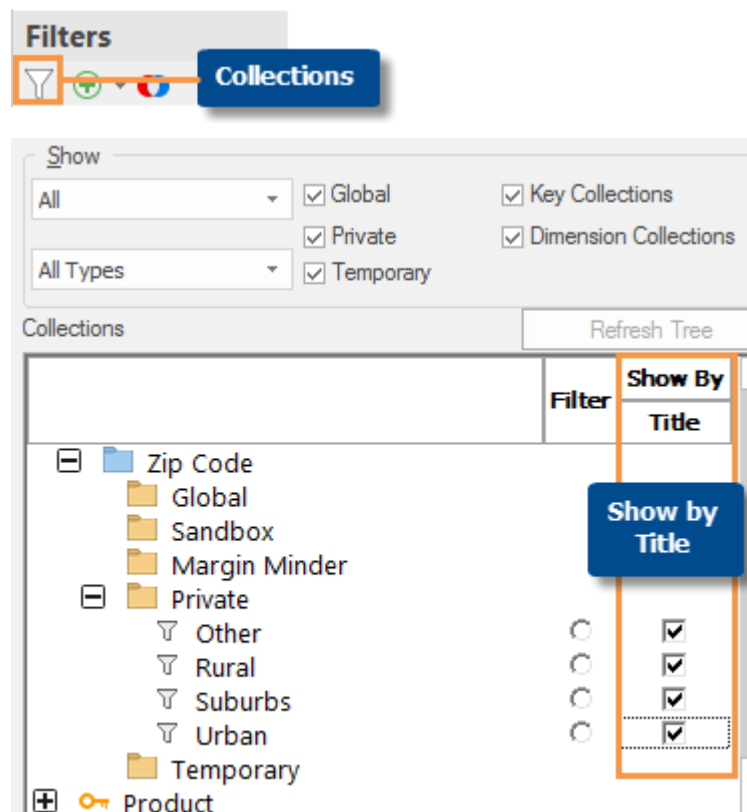
You can show a collection of dimension members by its title. This shows the collection as a whole so you can compare it with other collections and the total for the given context.



Collections shown by their titles					% Chg	This	Last
+	Suburbs	5,430	5,510	-80	-1.45	\$33,360	\$23,329
+	Urban	2,828	2,144	684	31.90	\$13,403	\$8,553
+	Rural	231	299	-68	-22.74	\$1,939	\$1,939
+	Other	0	0	0	0.00	\$0	\$0
Totals		8,369	7,837	532	6.79	\$47,777	\$33,008

To show a collection by its title

1. If you haven't already, [group By](#) (see page 12) the dimension of the collection. This step is not required but is recommended in order to show the collection immediately after you turn it on.
2. In the **Filters** section of the context panel, click the Collections  button.
3. In the **Collection** dialog, check the **Show By Title** box in the row of the collection you want to display. This option is only available for dimension collections.
4. Check additional **Show By Title** boxes if you want to compare multiple collections.
5. Click **OK**.



Tips:

To show an entire folder of collections by title, right-click on the folder name and select **Turn-On Show By Titles**.

Tips:

When Show By Title is on, the analysis shows the collection as a whole and treats it just like a dimension member, except that the focus window shows the characters "S-" (or "G_S-" if global).

The "Totals" row only includes data for members of the selected collections. To add a row showing the total for all members in the context, you can turn on the **Show Context Totals** option.

Focus

S-Suburbs

	Units Sold				
	Diff	% Chg	Th		
+ Suburbs	-80	-1.45	\$3		
+ Urban					
+ Rural					
+ Other					
Totals	8,369	7,837	532	6.79	\$4
Totals (Zip Code)	270.905	252.847	18.058	7.14	\$1.59

Insert

View

Design

Options

Member Options

Swap

Borders

Auto size columns

Show Context Totals

Highlight Settings

Expand Collection Men

You can select how SIM behaves when you expand members using the plus button **+**. By default, the collection expands into the members of the next By. You can select the **Expand Collection Members** option on the tools menu (under Design) to expand a collection into the members of the collection.


	This
G[SB]_Large Format	123,051
+ Local Chains	11,851
+ Mass Merchandisers	23,893
+ Regional Chains	87,307

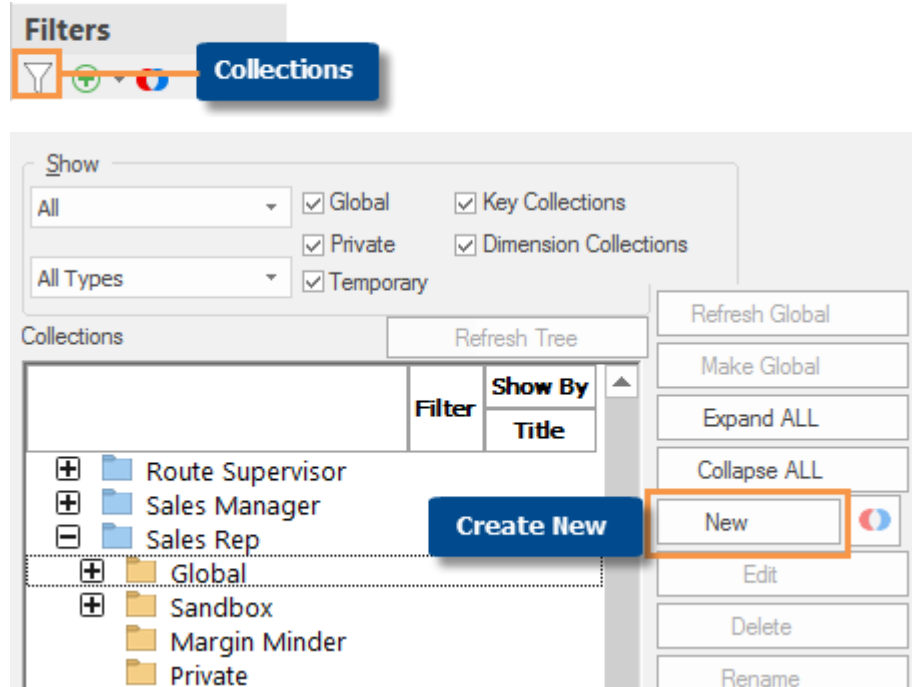
Create a collection

Create a classic collection

A classic collection contains a static list of key members or dimension members to allow you to filter out data for all other members.

To create a classic collection

1. In the Filtering section of the context panel, click the Collections  button.
2. In the **Collections** dialog, locate the row of the collection's key or dimension.
3. Underneath the key or dimension, select the category (global, private, etc.) and, optionally, subfolder where you want to save the collection.
4. Click **New**.



Tip: If you do not see the desired key, dimension, category, or folder, you may need to select options in the **Show** box in order to list more items in the collections tree.

To create a classic collection

5. In the **Edit Collection** dialog, enter a collection **Title**.
6. Under **Available Members**, highlight the members to add to the collection and click **Add**, or use other options in the Edit Collection dialog to add members.
7. When you are done adding members, click **OK**.

The screenshot shows the 'Edit Collection' dialog box. At the top, there is a 'Title' field with the text 'New Sales Reps'. Below this is a checkbox labeled 'Exclude selected members'. In the center, there are two lists: 'Selected Members: 6' on the left and 'Available Members: 3' on the right. The 'Selected Members' list contains: Nadler, Tim; Pence, Thomas; Visclosky, George; Gordon, Pat; English, John; and Davis, John. The 'Available Members' list contains: Allen, Chris; Andrews, Greg; Baird, Jim; Cline, Jose; DFLT_21; Hastings, Allyson; Inactive SIm; Jay Mattison; Johnson, Louise; Morris, Dutch; Office Accounts; Office-Doty; Office-Ferkel; Office-Haudensch; Office-Keel; Office-Kinser; Office-Lasoski; Office-Unknown; Pierce, Rick; Saxton, Tom; and Special Event. Between the two lists are buttons: « Add, Remove », « Swap », and Import. At the bottom, there is a 'Search By' section with a dropdown menu set to 'Name', a search input field, and an 'Options' button. Below the search field, it says 'Search Options: Search From Top'. There is also a small icon of a folder with a plus sign. Annotations with orange arrows and blue boxes highlight the following steps: 1. 'Enter title.' points to the Title field. 2. 'Highlight members.' points to the 'Available Members' list. 3. 'Add to collection.' points to the « Add button.

Tips:

You can also save checked members as a collection or create a classic collection using an exception test (i.e. Of These).


By default, collections filter out members that are not included in the collection. If you prefer, you can check the **Exclude selected members** box to filter out data for the collection members. This may help reduce the need to update collections in some situations. You cannot see the effect of this setting until you turn the collection on.

For key members only, if you want to select from a list of all members of the key, check the **Ignore Focus** box; otherwise, the Available Members list contains only key members in the current context.

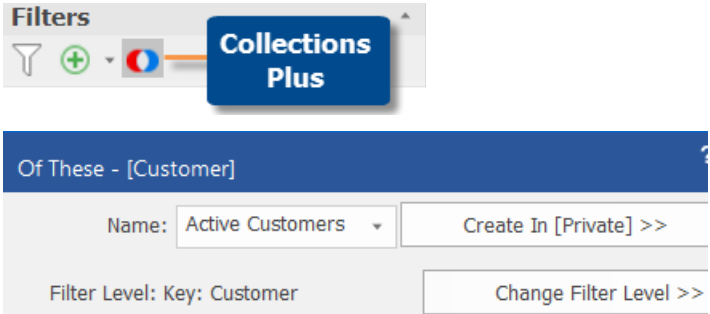
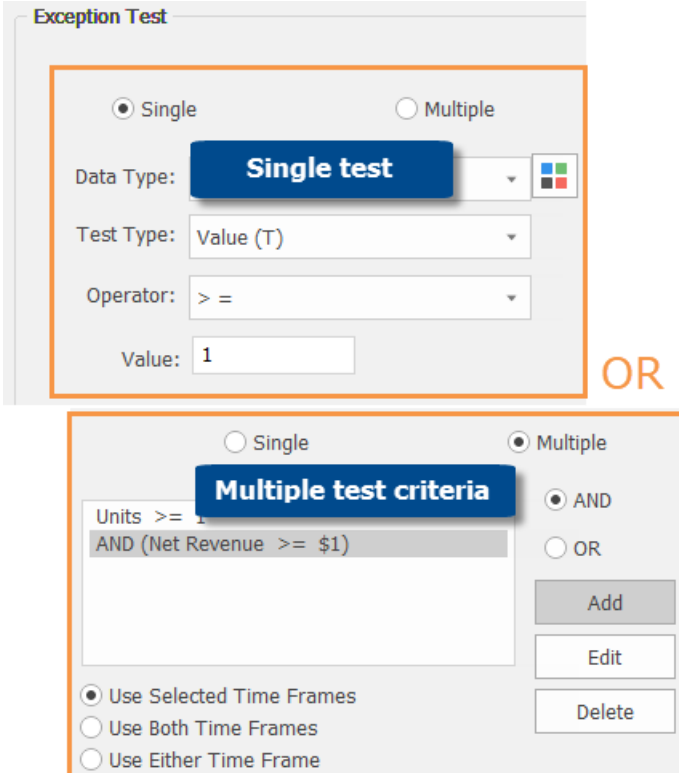
Create a dynamic collection (Of These)

A dynamic collection is a filter that dynamically updates based on test criteria, such as revenue above a given value. Every time you turn a dynamic collection on, SIM reruns the test based on the selected settings and your current view. This is different than a classic collection, which saves a static list of members. This type of collection is only available for key members (e.g., customers).

To create a dynamic collection (Of These)

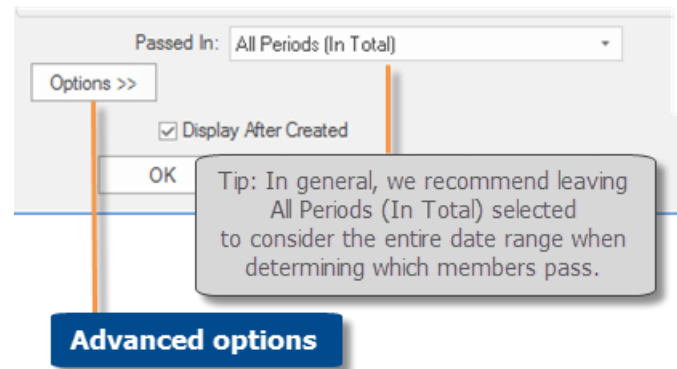
- Before creating Of These:
 - We recommend removing all filters from the current analysis window unless the filter will be used for a specific purpose related to the dynamic collection.
 - Select the initial [date settings](#) (see page 10). Depending on the settings, this date range may dynamically update.
 - Turn on or off equivalents as desired. The Of These stores the equivalent settings used when it was created.
- In the Filters section of the context panel, click the Collections Plus  button.
- In the **Of These** dialog, enter a collection name. If you do not enter a name, the collection will be temporary.
- Click **Create In** to select a global or private folder.
- To choose the key to test (e.g., customer), click **Change Filter Level**.
- In the **Exception Test** box, set the test criteria to determine which key members pass (e.g., customers that bought at least one unit). You can use a single test or set up multiple criteria.

In addition to standard test settings, [timeframe options](#) (see page 30) are available. These settings control which range(s) to test: the current date range (T) and/or previous date range (L).

To create a dynamic collection (Of These)

7. Under **Passed In**, select the part of the date range to consider for the test. These options affect the outcome when the date range includes multiple units of time (e.g., 12 weeks). Typically, **All Periods (In Total)** is recommended but additional options are available.
8. To immediately filter by the collection, check the **Display After Created** box.
9. If you wish, you can click the **Options** button to select from the following [advanced options](#) (see page 31).
10. When you are done defining the collection, click **OK**.



Timeframe options

In addition to standard test settings, you can choose the date range(s) to consider when determining which members pass: This, Last, both, or either. The method for selecting these options is different for a single exception test than multiple exception criteria.

In a single test, you can choose any of the following from the Test Type menu (see step 6 above) in addition to the difference and percent change options:

- Value (T) - Any members that meet test criteria during the current date range (This) will pass the test.
- Value (L) - Any members that meet test criteria during the previous date range (Last) will pass the test.
- Value (Both Time Frames) - Members that meet test criteria during both This and Last will pass the test.
- Value (Either Time Frame) - Members that meet test criteria during either This or Last will pass the test.

For multiple test criteria, you can click the buttons under the test criteria (see step 6 above) to choose the timeframe:

- Use Selected Time Frames - This option uses whatever timeframe is selected for each individual test setting (e.g. units for This and margin for Last).
- Use Both Time Frames - Key members that meet all test criteria during both This and Last will pass the test. This option is not available if any individual test setting uses values for Last.
- Use Either Time Frame - Key members that meet all test criteria during either This or Last will pass the test. This option is not available if any individual test setting uses values for Last.

Advanced options

Click the Options button to access the following settings.

Options «

Options

Context: By: Company Change Context

Limit To: No Additional Filter

Save As: Criteria

Date Options

☒ Dynamic Date ☐ Use current date

☐ Most Recent

☐ Most Recent Complete

☐ Fixed Date ME 12/2010 vs. YAG

Start Date: Adjusted

Tip: These options are recommended for most dynamic collections. See below for more information.

Option	Explanation
Context	Shows your currently selected filters as well as the By. SIM will limit the collection to the key members that belong to or have data for the filters shown here (regardless of the context settings used when the collection is turned on). To change any of the filters, click the Change Context button. This button also allows you to change the date range, modifiers, and more.
Limit To	Allows you to use limit results based on the focus or currently checked members.
Save As	Leave Criteria selected in order to save the test settings as a dynamic collection so that it updates automatically. Otherwise, the collection will be a static list of key members (i.e. classic).
Date Options	Typically, you would leave Dynamic Date selected so that the date range updates automatically based on the date range of the currently-selected view. However, additional date options are available.

Customize

Tools menu

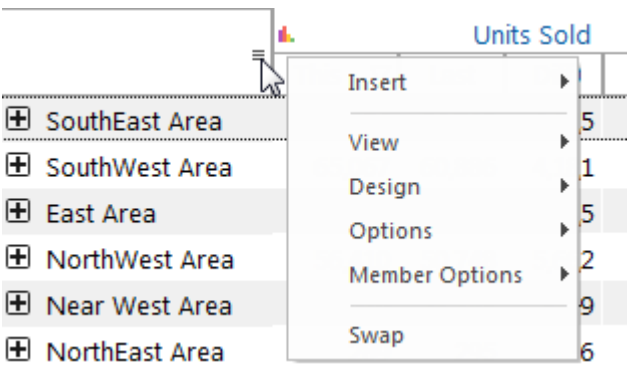
The tools menu includes various options to customize the analysis window.

To open the tools menu

In tables:

Place your cursor over the upper-left box.

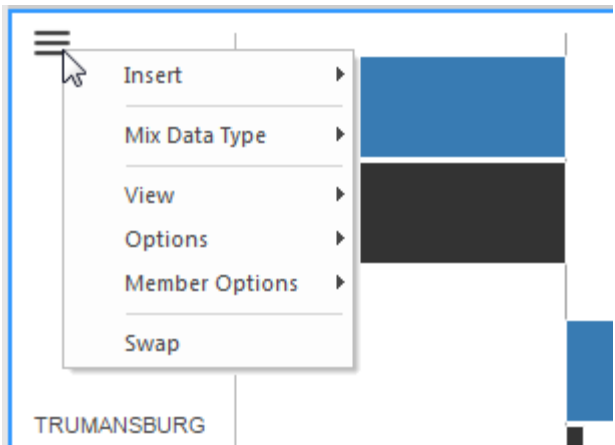
Click the ≡ icon that appears.



In graphs:

Place your cursor over the graph.

Click the ≡ button in the upper-left corner.



The available options depend on the analysis mode and view type. The following list includes the more common options.

Option	Explanation
Insert	Insert a data field (see page 17).
View	Select a view type (table or graph).
Design (tables only)	
- Borders	Add and remove borders in tables.

Option	Explanation
- Auto size columns	Return columns to their default width.
- Highlight Settings	Turn on/off and configure highlight settings.
Options	
- Tree Options	Expand or collapse dimension members.
- Sort	Select the primary or secondary sort (see page 35).
- Pointer Tools	Check or uncheck members; select the base for the Index pointer.
- Display Settings	<p>In tables:</p> <ul style="list-style-type: none"> You can Remove key and dim counts to prevent possible memory errors in large datasets. You can turn this option on in Comparative Dimension Members and other analyses, but counts will not be removed until you turn on a key list. <i>Multi Comparative only:</i> You can turn on actual or abbreviated dates instead of the default column headers to show the exact dates in the column's date range. <p>In graphs, display settings may include 2-D/3-D, dynamic scaling, show or hide totals, show flat view data, and more.</p>
- Item Description Format	Allows you to set options for displaying dimension member codes.
Member Options	
- Export	Export selected members to a text file.
- Import	Import a text file to create or append a collection.
- Save as Collection	Group selected members into a collection.
Swap	Swap columns and rows in a table or switch between vertical and horizontal bars in a graph.

Switch between view types

Multiple types of views, including tables and graphs, are available to present the data in each analysis.

To toggle between view types (e.g., table/graph)

1. Select the analysis window you want to change by clicking on it.
2. Click the button of the desired view type in the View section of the main tab, or click the numbers/graph drop-down button at the top of the analysis window.

Tip: Click the button to toggle between table/graph.

Comp ~ ME 1/2011 vs. YAG

Package

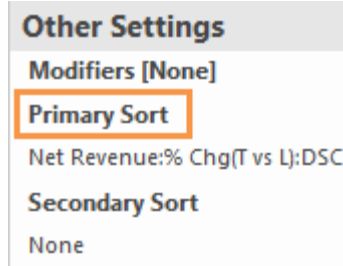
Net Revenue				Units Sold				
	Last	% Chg	This	Last	Diff	% Chg		
	\$427,822	-40.94	40,926	65,562	-24,636	-37.58	\$1	
	\$314,541	-4.77	33,838	36,467	-2,628	-7.21	\$2	
6Pk Cn	\$221,860	\$294,331	-24.62	27,107	34,838	-7,731	-22.19	\$1
16PNR8	\$124,048	\$339,972	-63.51	27,053	77,436	-50,383	-65.06	\$
10Oz Pa	\$107,134	\$160,241	-33.14	17,848	25,421	-7,573	-29.79	\$

Tip: If the currently-selected bookmark includes a custom report, it can be found in the view types area along with standard tables and graphs. Custom reports may have additional capabilities and limitations. See the custom report documentation for more information.

Sort

To sort

1. Click on the analysis window to select it.
2. Under **Other Settings** in the context panel, click **Primary Sort** or **Secondary Sort**.
3. Under **Sort Selection**, select whether you want to change the primary sort or secondary sort. The secondary sort is used to rank members that fall into the same place based on the primary sort.
4. Under **Sort Order**, choose how to sort and then select from the corresponding menu if applicable. For a data field, % change, or difference, select the specific field and timeframes from the Data Type menus.
5. Under **Order**, choose to sort in Ascending or Descending order (not used for "As Reordered").



Sort Selection

☒ Primary (Units Sold:% Chg(T vs L):DSC)

☐ Secondary (None:ASC)

Sort Order

☐ None

☐ As Reordered

☐ Name

☐ Number/Code

☐ Data

☒ % Change

☐ Difference

☐ Description

☐ Dimension

1st By

Order

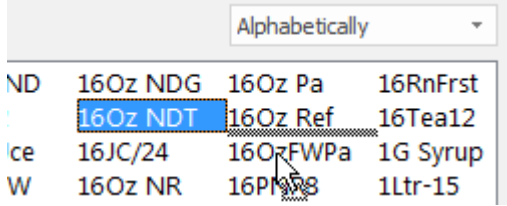
☐ Ascending

☒ Descending

Data Type:

Time:

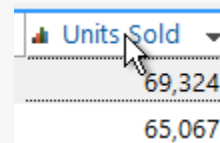
VS:

Option	Explanation
As Reordered	<p>You can put dimension members in a custom order. To use this option:</p> <ol style="list-style-type: none"> 1. In the Sort Order dialog, click the As Reordered radio button. 2. From the drop-down menu by the Reorder button, leave 1st By selected to reorder the primary groupings, or select a different level of groupings to reorder. 3. Click Reorder. 4. In the Reorder dialog, do a combination of the following to place the dimension members in the desired order: <ul style="list-style-type: none"> - Choose from the drop-down menu to sort members alphabetically or as they are sorted in the current analysis. - Drag and drop members to the desired location in the window.  <p>Tip: You can search the list using the controls at the bottom of the dialog.</p>

Tips for sorting:

You can sort by a data field even if it isn't currently shown in the analysis window.

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



Units Sold
69,324
65,067

The window uses the selected sort method until you perform a new sort or turn on a key list. Key lists retain their own sort order.

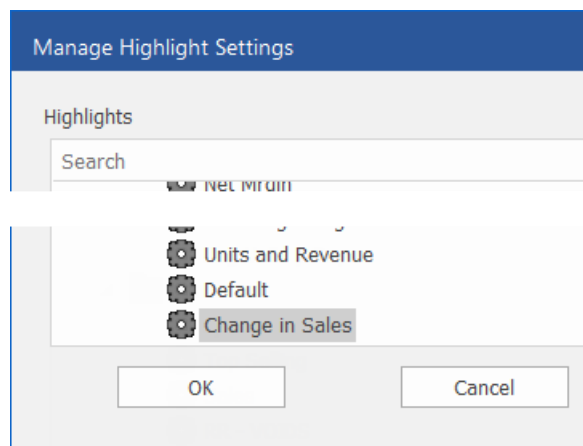
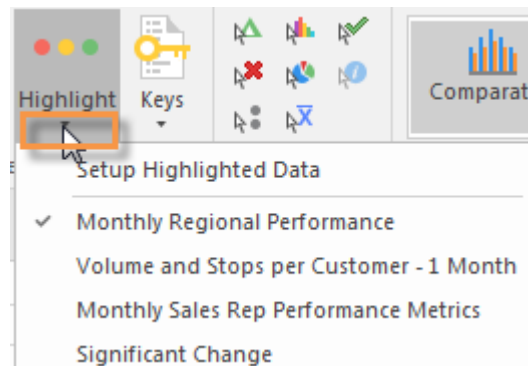
Highlighting

You can turn on highlighting to spot areas of concern or importance. Highlight settings can be customized and reused.

	Units					Net Revenue				
	This	Last	Diff	% Chg		This	Last	Diff	% Chg	
Office-Lasoski	11,636	8,804	2,832	32.17	↑	\$111,119	\$74,527	\$36,591	49.10	↑
da Matta, Cristian	10,346	9,872	474	4.80	—	\$73,817	\$77,729	(\$3,912)	-5.03	—
Fittipaldi, Christia	9,934	6,811	3,123	45.85	↑	\$72,225	\$55,037	\$17,187	31.23	↑
Blundell, Mark	9,087	9,842	-755	-7.67	—	\$66,382	\$78,324	(\$11,942)	-15.25	↓
Tagliani, Alexander	7,882	9,610	-1,728	-17.98	↓	\$59,585	\$74,636	(\$15,051)	-20.17	↓
Office-Ferkel	7,575	9,627	-2,052	-21.32	↓	\$67,080	\$84,437	(\$17,358)	-20.56	↓
Totals	227,265	252,847	-25,582	-10.12	↓	\$1,990,422	\$2,251,558	(\$261,136)	-11.60	↓

To turn on highlighting

1. Open a view that supports highlighting. These include tables, flat views, % change bar graphs, some Crosstab graphs, Scattergram graphs, Bubble graphs, Geo maps, and Line Item graphs.
2. Click the arrow under the highlight button.
3. You can select from a limited number of recently-used highlight settings in the menu, or select **Setup Highlighted Data** to access the dialog where you can access all highlight settings.
3. If you open the dialog, select the desired highlight settings and click **OK**, or click **New** to add highlight settings.



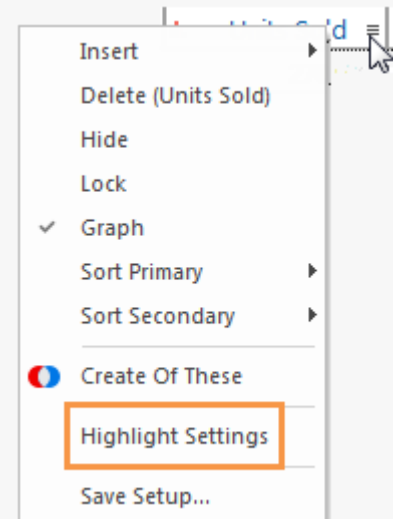
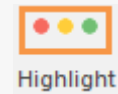
Tips:

You can click the Highlight button in the setup section of the main tab to quickly turn on or off the most-recently-selected highlight settings.

You can apply new highlight settings to an individual column or row.

1. Place your cursor over the column or row and click the ≡ icon that appears.
2. In the menu, select **Highlight Settings**.
3. In the **Highlight Setting Info** dialog, define the highlighting criteria for the column or row.

SIM temporarily stores the new or updated highlight settings in an "Undefined" highlight setting. You can save these highlight settings to reuse them in future sessions by opening the tools menu and selecting **Design, Highlight Settings, Save Highlights**.



Preference settings allows you to change the shade of highlighting and the number of highlight settings listed in the drop-down menu.

Save and Share

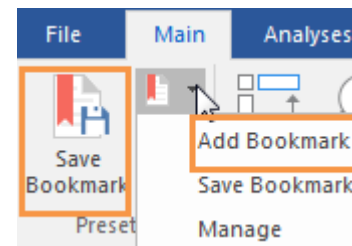
Bookmarks

You can create a bookmark to save and share a view of the data.

To add a bookmark

1. Set up one or more analysis windows to use the By, date range, data fields, filters, and any other parameters of the bookmark you want to create.
2. On the main tab of the ribbon control, click **Save Bookmark** or click the bookmark drop-down button and select **Add Bookmark**.

Tip: Both options open the same dialog when you create a new bookmark; if you are saving changes to an existing bookmark, the Save option loads the existing bookmark name and other options.



3. In the dialog, type a bookmark name and select from the following bookmark options.

Add Bookmark

Bookmark Name

☒ Ignore Focus

Date Options

☐ Most Recent

☒ Most Recent Complete

☐ Fixed Date

☐ Use current date

Start Date:

YTD

Save as preferred options

☐ Use as startup Bookmark/Supemark

☐ Use as default window Bookmark

☐ Store multiple views as a Supemark


OK

Cancel

Help

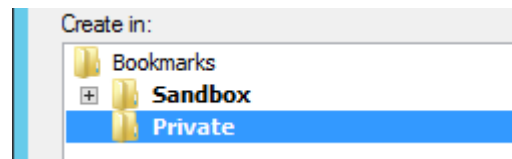
Create in >>

Option	Explanation
Ignore Focus	<p>This option resets the focus to the first available member when viewed.</p> <p>Tip: When comparing members for an automatically updated date range (i.e., most recent or most recent complete), we recommend leaving this option checked to automatically go to the beginning of the list. In time-series views or other views that filter out data based on the focus member, we recommend leaving this option off in order to retain the filter.</p>
Date Options	Choose how to update the date range of the bookmark.
- Most Recent	Automatically updates the date range to go to the most recent day(s), month(s), or period(s) in the selected data cube. This option can show incomplete months and periods. This option is not available for weeks (instead use Most Recent Complete).
- Most Recent Complete	Automatically updates the date range to go to the most recent <u>complete</u> week(s), month(s), or period(s) in the selected data cube. SIM uses a set of rules to determine what is considered to be complete. Most Recent Complete is not available for daily time resolution (instead use Most Recent).
- Fixed Date	Uses the date range selected during bookmark creation regardless of when the bookmark is opened.
- Use current date	This option is useful for budgets, non-transactional data, or other types of data cubes that may extend into the future. With this option on, SIM will use the current date of your system, rather than a future date in the data cube, to determine the date range when viewing the data.
- Start Date	<p>For use with the Most Recent and Most Recent Complete options, this setting lets you control whether SIM will adjust the start date to use the same number of days, weeks, months, or periods as the original analysis, or adjust the number of dates to maintain a fixed start date. Select one of the following options from the Start Date drop-down menu:</p> <ul style="list-style-type: none"> • Adjusted - will change the start date so that the results include the same number of days, weeks, months, or periods as the original analysis. The entire date range moves as time goes on. • YTD - Assigns the first day of the current year as the start date, regardless of the current date. With this option, the numbers of days, weeks, months, or periods change to include the first of the year through the most recent (or most recent complete) date. The date range grows as time goes on. • Fixed - Sets the start date of the original analysis as a fixed start date, regardless of the current date. With this option, the numbers of days, weeks, months, or periods change depending on when users view the data. The date range grows as time goes on.
- Save as preferred options	Save the currently selected Date Options as the default.
Use as startup Bookmark/Supermark	Use the bookmark as the initial view when you first start up or reset windows.

Option	Explanation
Use as default window Bookmark	Save as home view (new windows or when you click the Home button  .
Store multiple views as a Supermark	Save all currently-open analysis windows, including the relative window sizes and whether or not their context bars are hidden, as a supermark.

To add a bookmark (continued)

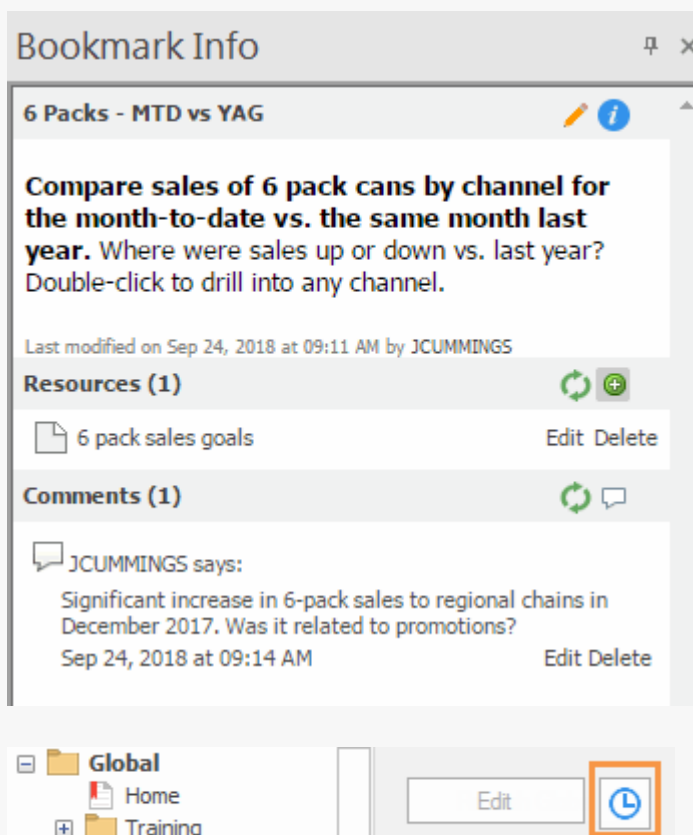
- Click **Create in**; then select the folder where you want to save the bookmark. If you have rights to create global user data, you can make a bookmark available to other users by saving it in a global category or one of its subfolders.
- Click **OK**.




Tips:

All components (setups, collections, etc.) of global bookmarks must be global. If you are saving a global bookmark that includes private components (setups, collections, etc.), then you are prompted to make the private components global. In this case, SIM retains a private copy of the bookmark component(s), but uses the global component(s) in the bookmark.

If Knowledge Manager is configured, you can save a description and additional resources for the bookmark.



You can change the date options for a bookmark at any time, by selecting it in the bookmark management dialog and clicking the  button.

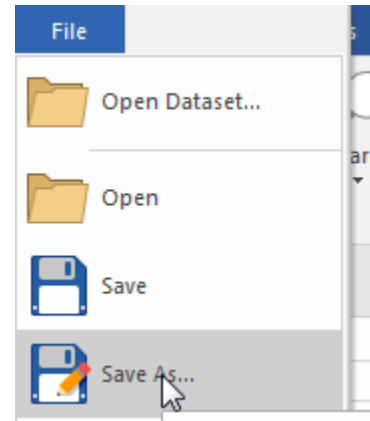
To edit any other aspect of a bookmark (By, data fields, etc.), open the bookmark, make the desired changes and then save the bookmark.

Export data

You may be able to export analysis data to a file that can be used in another application, such as Excel. If you want to export this information on a regular basis, you might want to [create a macro](#) (see page 62).

To export data

1. Click on the analysis you want to export in order to make it active.
2. On the **File** menu, select **Save As**.
3. In the **Save As** dialog, from the **Save as type** drop-down menu, select a file type.
4. Select a location and name for the file you want to export.
5. Click **Save**.



If you are exporting an encrypted Excel file, the **Enter Password** dialog will appear. Type and re-type the password required to open the file. This password must meet security requirements.

Output preference settings control aspects of the file, such as what is included in the header and various Excel/CSV options.

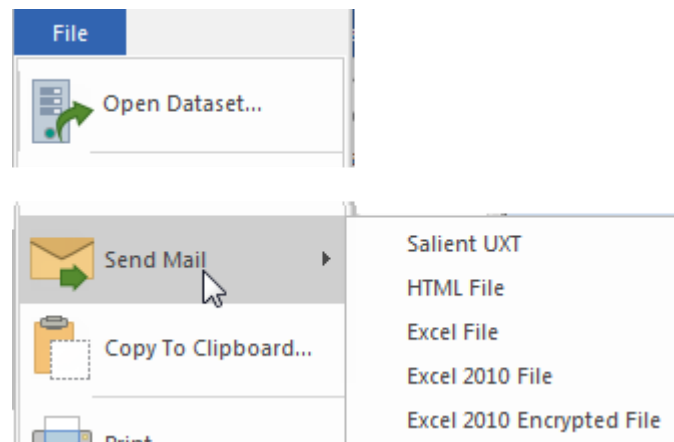
Email data

You can email data from an analysis in order to share it with others. The analysis or list becomes an email attachment in the selected format. This function only works with MAPI-capable email software that is properly configured prior to use. If you want to email this information on a regular basis, you might want to [create a macro](#) (see page 62). You can also [export a file](#) (see page 42) and manually attach it to an email message if you prefer.

To email data

1. Click on the analysis you want to send in order to make it active.
2. On the **File** menu, select **Send Mail**.
3. On the submenu, select a format. (Your administrator may limit these options.)

- Salient UXT - can be opened in SIM.
- HTML File (for table format only)
- Excel File (for table format only) - can be opened in Microsoft Excel® Version 1997 or higher.
- Excel 2010 File (for table format only) - can be opened in Microsoft Excel Version 2007 or higher. This format is affected by SIM output preferences and allows more rows and columns than previous versions.
- Excel 2010 File (for table format only) - This is an Excel 2010 file that requires a password to open it.




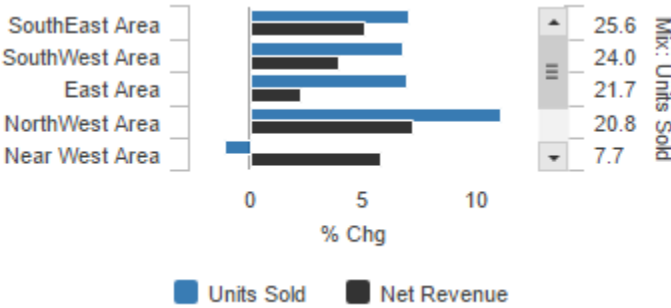


4. Depending on the format, you may be prompted to select additional options. For a Salient UXT file, select options to use when the UXT file is opened; these are the same as [bookmark options](#) (see page 40). For an encrypted Excel file, enter the password required to open the file; this password must meet security requirements.
5. If the system is configured for regular SMTP email, the default mail program should open automatically with the data as an attachment. You can then enter the To address, subject, message, etc., and send the email.


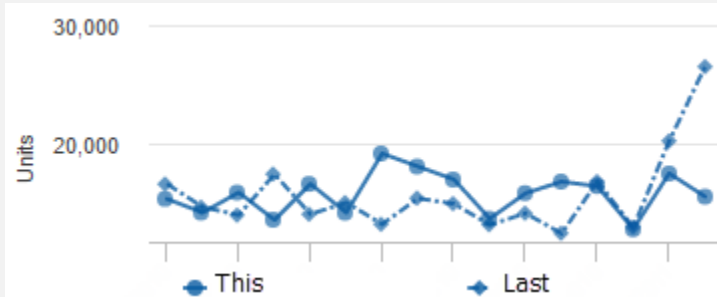


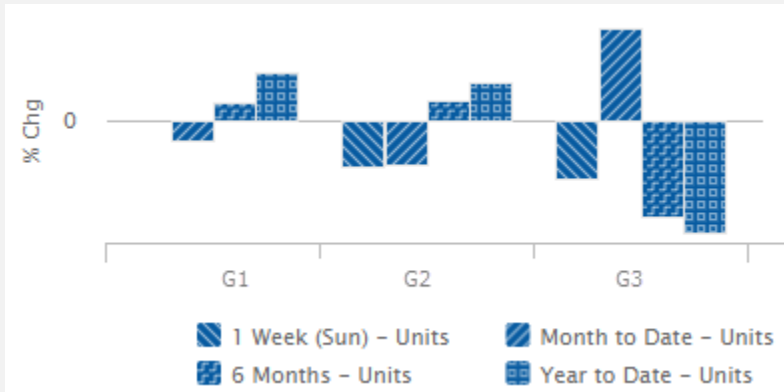
If the system is configured for secure SMTP email, the **Send Secure Email** dialog will open. Enter settings to define the outgoing mail server, user name and password for an authorized SMTP account (if not already populated), From address, To address, subject, and message body. Then, click **OK** to send the email.


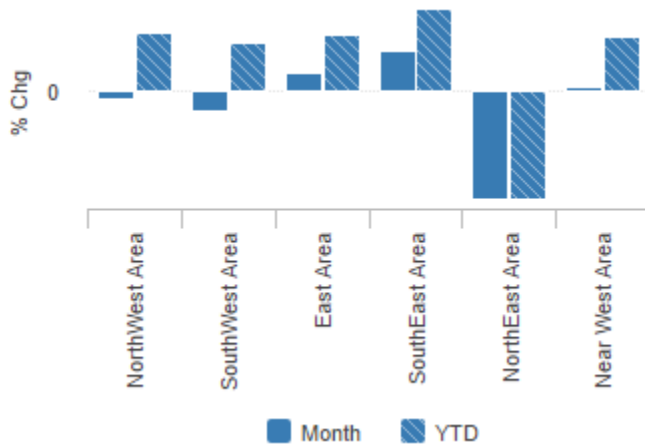

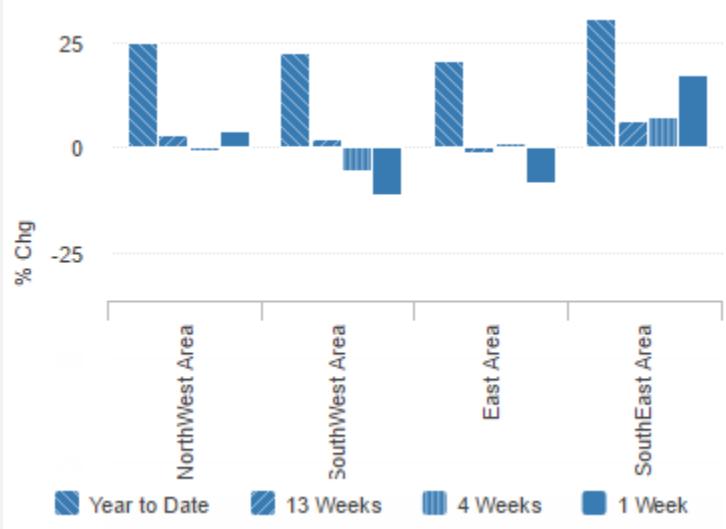

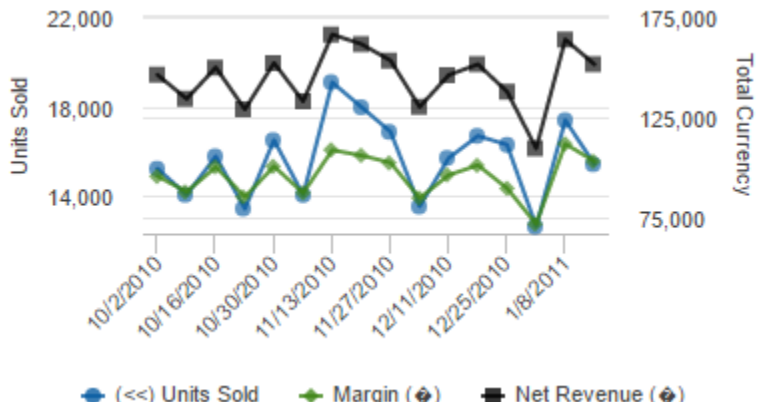
Advanced Topics


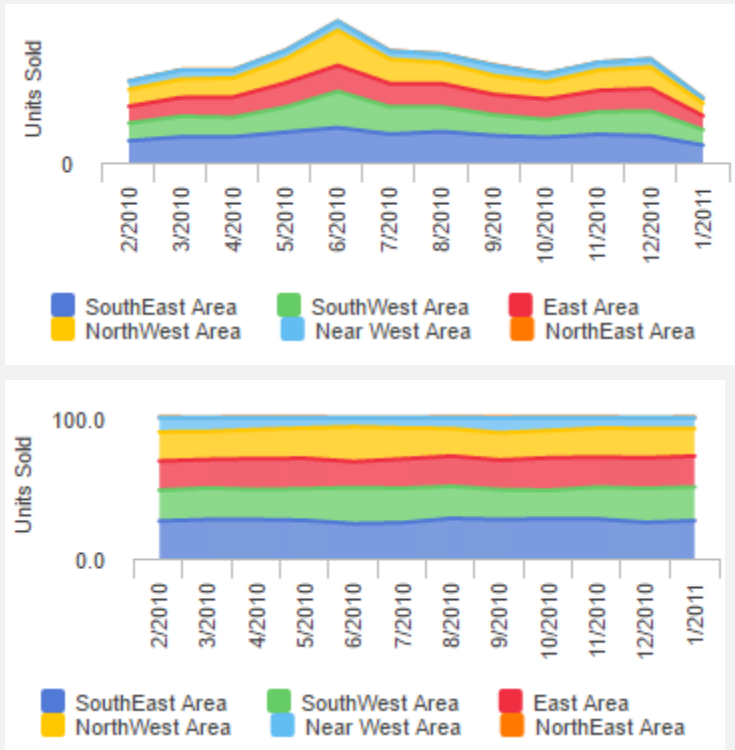


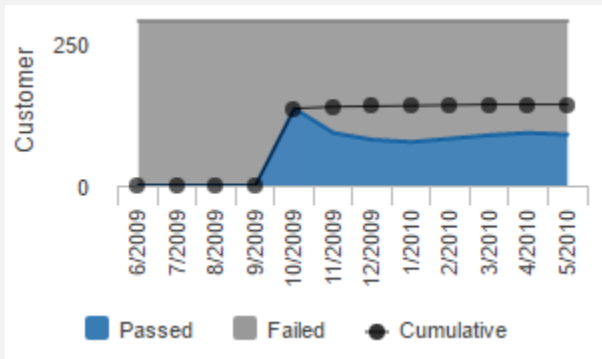
Analysis types


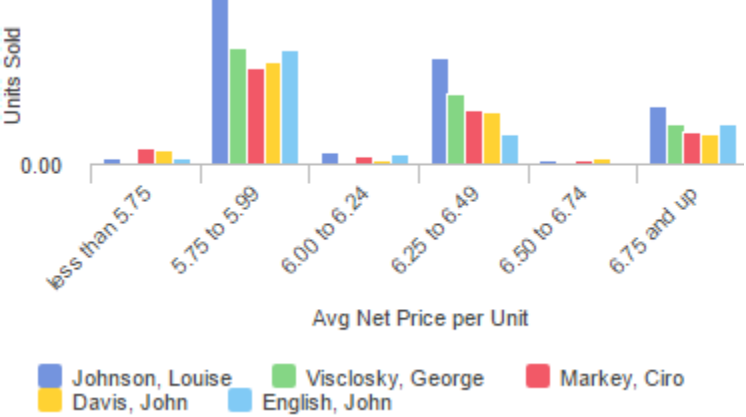

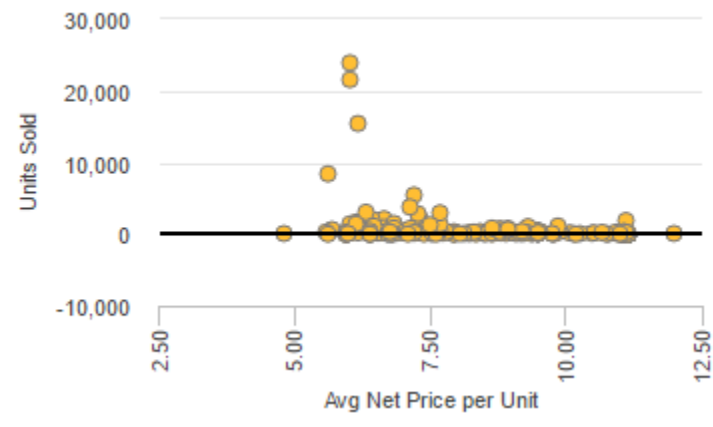

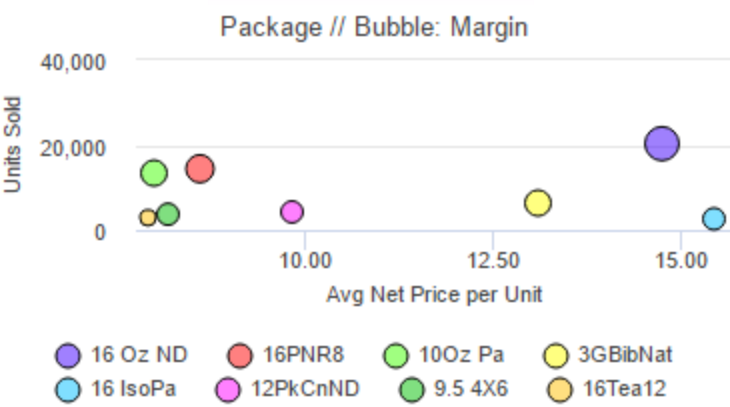
You can choose from various modes of analysis depending on what you want to find out about the data and how you want to display it. Most analyses include multiple [view types](#) (see page 34), including tables and graphs, for presenting the data.




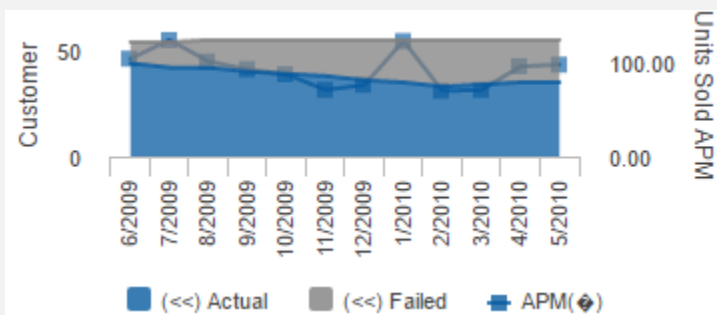

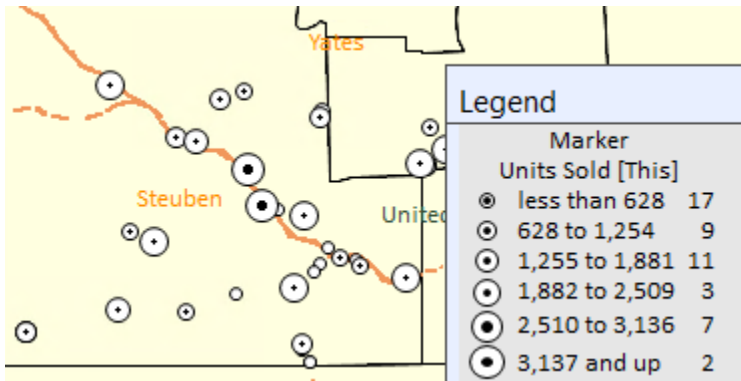
Analysis type	Examples																																																											
<div> Comparative</div> <p>Comparison of members for one or two date ranges; any number of data fields. By default, the analysis aggregates data at the top-level dimension (1st By); however, you can expand the data to see combinations of multiple dimensions (see page 51).</p>	<div><table><tr><th></th><th colspan="2">Units Sold</th><th colspan="2">Net Revenue</th></tr><tr><th></th><th>This</th><th>% Chg</th><th>This</th><th>% Chg</th></tr><tr><td>⊕ SouthEast Area</td><td>69,324</td><td>7.12</td><td>\$622,179</td><td>5.16</td></tr><tr><td>⊕ SouthWest Area</td><td>65,067</td><td>6.87</td><td>\$553,981</td><td>3.97</td></tr><tr><td>⊕ East Area</td><td>58,896</td><td>6.98</td><td>\$464,027</td><td>2.26</td></tr><tr><td>⊕ NorthWest Area</td><td>56,410</td><td>11.16</td><td>\$501,003</td><td>7.32</td></tr><tr><td>⊕ Near West Area</td><td>20,919</td><td>-1.08</td><td>\$216,440</td><td>5.84</td></tr></table><div><table><tr><th></th><th>SalesRep</th><th colspan="2">Units</th></tr><tr><th></th><th></th><th>This</th><th>% Chg</th></tr><tr><td>NorthWest Area</td><td>Tracy, Paul</td><td>20,405</td><td>-2.16</td></tr><tr><td>East Area</td><td>Vasser, Jimmy</td><td>17,023</td><td>10.42</td></tr><tr><td>SouthWest Area</td><td>Fernandez, Adrian</td><td>16,484</td><td>4.56</td></tr><tr><td>SouthEast Area</td><td>Brack, Kenny</td><td>15,226</td><td>11.62</td></tr></table><div></div></div></div>		Units Sold		Net Revenue			This	% Chg	This	% Chg	⊕ SouthEast Area	69,324	7.12	\$622,179	5.16	⊕ SouthWest Area	65,067	6.87	\$553,981	3.97	⊕ East Area	58,896	6.98	\$464,027	2.26	⊕ NorthWest Area	56,410	11.16	\$501,003	7.32	⊕ Near West Area	20,919	-1.08	\$216,440	5.84		SalesRep	Units				This	% Chg	NorthWest Area	Tracy, Paul	20,405	-2.16	East Area	Vasser, Jimmy	17,023	10.42	SouthWest Area	Fernandez, Adrian	16,484	4.56	SouthEast Area	Brack, Kenny	15,226	11.62
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Analysis type	Examples																																																															
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<div></div> <div>Crosstab</div> <div>Comparison grid or graph that groups data two different ways at once; one or two data fields</div>	<table><tr><th>Units Sold</th><th>Our Cola</th><th>Our Neon</th><th>Our DietCola</th><th>Our SF CF Cola</th></tr><tr><td>SouthEast Area</td><td>323,037</td><td>126,386</td><td>107,892</td><td>28,969</td></tr><tr><td>SouthWest Area</td><td>302,566</td><td>98,513</td><td>101,382</td><td>30,813</td></tr><tr><td>East Area</td><td>272,784</td><td>120,565</td><td>87,853</td><td>28,323</td></tr><tr><td>NorthWest Area</td><td>263,224</td><td>117,116</td><td>80,532</td><td>28,479</td></tr><tr><td>Near West Area</td><td>65,345</td><td>27,101</td><td>32,526</td><td>5,822</td></tr></table>	Units Sold	Our Cola	Our Neon	Our DietCola	Our SF CF Cola	SouthEast Area	323,037	126,386	107,892	28,969	SouthWest Area	302,566	98,513	101,382	30,813	East Area	272,784	120,565	87,853	28,323	NorthWest Area	263,224	117,116	80,532	28,479	Near West Area	65,345	27,101	32,526	5,822																																	
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<div></div> <div>Multi Comparative</div> <div>Comparison of members for any number of date ranges; any number of data fields</div>	<table><tr><th></th><th colspan="2">1 Week (Sun) Units</th><th colspan="2">Month to Date Units</th><th colspan="2">6 Months Units</th><th colspan="2">Year to Date Units</th></tr><tr><th></th><th>This</th><th>Last</th><th>This</th><th>Last</th><th>This</th><th>Last</th><th>This</th><th>Last</th></tr><tr><td>⊕ All Others</td><td>5,096</td><td>3,825</td><td>19,564</td><td>21,664</td><td>150,504</td><td>165,353</td><td>327,249</td><td>330,204</td></tr><tr><td>⊕ Group 1</td><td>446</td><td>446</td><td>1,757</td><td>1,885</td><td>14,297</td><td>13,482</td><td>28,520</td><td>24,452</td></tr><tr><td>⊕ Group 2</td><td>117</td><td>139</td><td>459</td><td>543</td><td>4,928</td><td>4,618</td><td>9,857</td><td>8,712</td></tr><tr><td>⊕ Group 3</td><td>12</td><td>15</td><td>58</td><td>44</td><td>374</td><td>557</td><td>789</td><td>1,286</td></tr><tr><td>⊕ Group 4</td><td>0</td><td>0</td><td>888</td><td>162</td><td>5,066</td><td>1,390</td><td>7,251</td><td>2,764</td></tr></table> 		1 Week (Sun) Units		Month to Date Units		6 Months Units		Year to Date Units			This	Last	This	Last	This	Last	This	Last	⊕ All Others	5,096	3,825	19,564	21,664	150,504	165,353	327,249	330,204	⊕ Group 1	446	446	1,757	1,885	14,297	13,482	28,520	24,452	⊕ Group 2	117	139	459	543	4,928	4,618	9,857	8,712	⊕ Group 3	12	15	58	44	374	557	789	1,286	⊕ Group 4	0	0	888	162	5,066	1,390	7,251	2,764
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Analysis type	Examples
 Multi Comp-2 Comparison of members for month-to-date (or period to date) and year-to-date versus year ago (YAG); single data field	 <p>A bar chart comparing % change for six regions: NorthWest Area, SouthWest Area, East Area, SouthEast Area, NorthEast Area, and Near West Area. For each region, two bars are shown: a solid blue bar for 'Month' and a hatched blue bar for 'YTD'. The y-axis is labeled '% Chg' with a zero line. The NorthEast Area shows a significant negative change for both metrics.</p>
 Multi Comp-4 Comparison of members for one week, four weeks, thirteen weeks, and year-to-date versus YAG; single data field	 <p>A bar chart comparing % change for four regions: NorthWest Area, SouthWest Area, East Area, and SouthEast Area. For each region, four bars are shown: 'Year to Date' (hatched blue), '13 Weeks' (solid blue), '4 Weeks' (vertical striped blue), and '1 Week' (horizontal striped blue). The y-axis is labeled '% Chg' with markers at -25, 0, and 25. The SouthEast Area shows the highest positive change across all periods.</p>
 Trend Trend over time for multiple data fields	 <p>A line chart showing trends over time from 10/2/2010 to 1/8/2011. The left y-axis is 'Units Sold' (14,000 to 22,000) and the right y-axis is 'Total Currency' (75,000 to 175,000). Three data series are plotted: '(<<) Units Sold' (blue line with circles), 'Margin (€)' (green line with diamonds), and 'Net Revenue (€)' (black line with squares). All three metrics show a similar upward trend with some fluctuations.</p>

Analysis type	Examples																																										
<div> <i>Share Trend</i></div> <p>Comparison trend for multiple members; either actual values or percent of the total for single data field</p>	<div></div>																																										
<div> <i>Exception</i></div> <p>Pass and fail of key members for an exception test (e.g., customers with units >=1)</p>	<table><thead><tr><th></th><th>Totals ▾</th><th>Passed</th><th>% Passed</th><th>Failed</th><th>% Failed</th></tr></thead><tbody><tr><td>⊕ All Others</td><td>5,498</td><td>901</td><td>16.4</td><td>4,597</td><td>83.6</td></tr><tr><td>⊕ College Full Service</td><td>173</td><td>71</td><td>41.0</td><td>102</td><td>59.0</td></tr><tr><td>⊕ DJ Inc.</td><td>94</td><td>23</td><td>24.5</td><td>71</td><td>75.5</td></tr><tr><td>⊕ Overring Inc.</td><td>37</td><td>15</td><td>40.5</td><td>22</td><td>59.5</td></tr><tr><td>⊕ Lakeside Garage</td><td>36</td><td>22</td><td>61.1</td><td>14</td><td>38.9</td></tr><tr><td>⊕ D & C Group</td><td>33</td><td>19</td><td>57.6</td><td>14</td><td>42.4</td></tr></tbody></table>		Totals ▾	Passed	% Passed	Failed	% Failed	⊕ All Others	5,498	901	16.4	4,597	83.6	⊕ College Full Service	173	71	41.0	102	59.0	⊕ DJ Inc.	94	23	24.5	71	75.5	⊕ Overring Inc.	37	15	40.5	22	59.5	⊕ Lakeside Garage	36	22	61.1	14	38.9	⊕ D & C Group	33	19	57.6	14	42.4
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<div> <i>Exception Time Series</i></div> <p>Pass and fail of key members for an exception test over time</p>	<div></div>																																										

Analysis type	Examples
 Range Distribution of values of a transactional data field across ranges of another data field (e.g., volume over price ranges)	 <p>A bar chart titled 'Range' showing the distribution of 'Units Sold' (Y-axis, 0.00 to 10,000) across six price ranges (X-axis: 'less than 5.75', '5.75 to 5.99', '6.00 to 6.24', '6.25 to 6.49', '6.50 to 6.74', '6.75 and up'). The chart compares five individuals: Johnson, Louise (blue); Visclosky, George (green); Markey, Ciro (red); Davis, John (yellow); and English, John (light blue). The highest sales volume is in the '5.75 to 5.99' range, with Johnson, Louise having the highest units sold in that range.</p>
 Scattergram Plot of key members (e.g., customers) for two data fields to show trends and outliers	 <p>A scattergram showing 'Units Sold' (Y-axis, -10,000 to 30,000) versus 'Avg Net Price per Unit' (X-axis, 2.50 to 12.50). The data points are orange circles. Most points are clustered near the X-axis (Units Sold near 0) for prices between 5.00 and 10.00. There are several outliers with high 'Units Sold' (up to 25,000) at prices around 6.00 to 7.00.</p>
 Bubble Plot of dimension members for two or three data fields	 <p>A bubble chart titled 'Package // Bubble: Margin' showing 'Units Sold' (Y-axis, 0 to 40,000) versus 'Avg Net Price per Unit' (X-axis, 10.00 to 15.00). The bubbles represent different packages, with size indicating volume and color indicating package type. The legend includes: 16 Oz ND (purple), 16PNR8 (red), 10Oz Pa (green), 3GBibNat (yellow), 16 IsoPa (light blue), 12PkCnND (pink), 9.5 4X6 (dark green), and 16Tea12 (orange). The largest bubble is for '16 Oz ND' at a price of approximately 14.50 and units sold of 20,000.</p>

Analysis type	Examples																																													
<div> P&L Format</div> <div>A scorecard showing any number of data fields for two date ranges and, optionally, budgeted goals</div>	<table><thead><tr><th></th><th>This</th><th>Last</th><th>Diff</th><th>% Chg</th></tr></thead><tbody><tr><td>Units Sold</td><td>220,459</td><td>204,532</td><td>15,927</td><td>7.79</td></tr><tr><td>% Discount</td><td>10.5</td><td>8.2</td><td>2.3</td><td>28.13</td></tr><tr><td>Customer Support</td><td>\$0</td><td>\$0</td><td>\$0</td><td>0.00</td></tr><tr><td>Margin</td><td>\$1,635,957</td><td>\$1,201,742</td><td>\$434,215</td><td>36.13</td></tr><tr><td>% Margin</td><td>61.2</td><td>50.9</td><td>10.3</td><td>20.26</td></tr><tr><td colspan="5"><hr/></td></tr><tr><td>Net Revenue</td><td>\$2,672,468</td><td>\$2,360,909</td><td>\$311,559</td><td>13.20</td></tr><tr><td>COGS % Net Sales</td><td>38.8</td><td>49.1</td><td>-10.3</td><td>-21.01</td></tr></tbody></table>		This	Last	Diff	% Chg	Units Sold	220,459	204,532	15,927	7.79	% Discount	10.5	8.2	2.3	28.13	Customer Support	\$0	\$0	\$0	0.00	Margin	\$1,635,957	\$1,201,742	\$434,215	36.13	% Margin	61.2	50.9	10.3	20.26	<hr/>					Net Revenue	\$2,672,468	\$2,360,909	\$311,559	13.20	COGS % Net Sales	38.8	49.1	-10.3	-21.01
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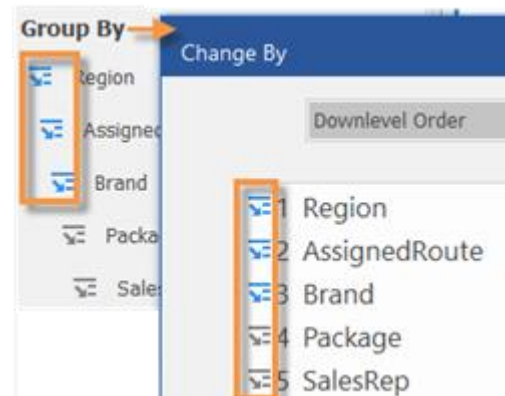
Auto-expansion in flat view

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

1st By		2nd By, 3rd By, etc.		Units			
	AssignedRoute	Brand	Package	This	Last	Diff	% Chg
East Area	Sayre,Waverly	Our Cola	12Pk Cn	496	966	-470	-48.65
SouthWest Area	S.Newburg-BigFlats	Ginger Ale	2Ltr-8	107	517	-410	-79.30
SouthEast Area	Serv Rite Freeville	Our Neon	Cans	792	1,188	-396	-33.33
SouthEast Area	S.Newburg-Ithaca	Our Neon	Cans	1	390	-389	-99.74
Near West Area	Vending	Spring Water	20Oz ND1	54	386	-332	-86.01

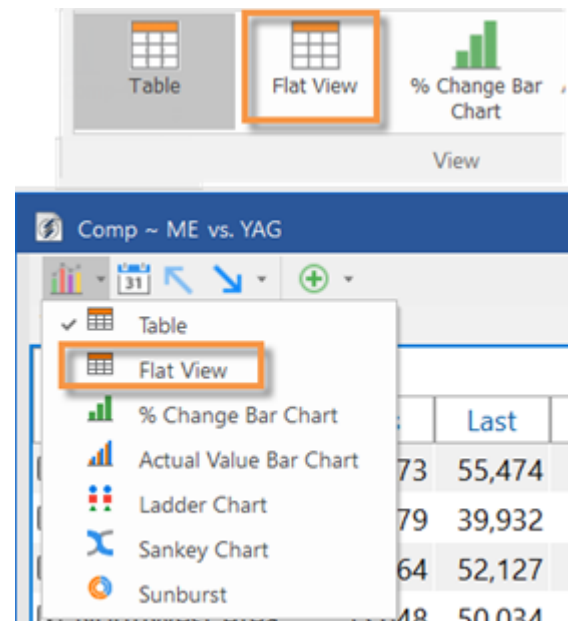
To expand dimensions in flat view

1. Open one of the following analysis types:Comparative Dimension Members; Multi Comparative; Multi Comparative-2; Multi Comparative-4
2. Group the data by your preferred dimensions in the order you want the columns to appear.
3. In the context panel or Change By dialog, click the  icon beside the dimensions to auto-expand (i.e., show next dimension as separate column). The icon is blue  when auto-expand is on.



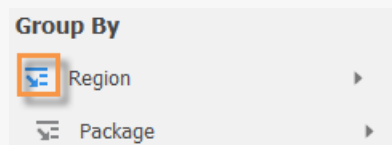
To expand dimensions in flat view

4. Choose **Flat View** either in the View section of the main tab or the numbers/graph drop-down button at the top of the analysis window.



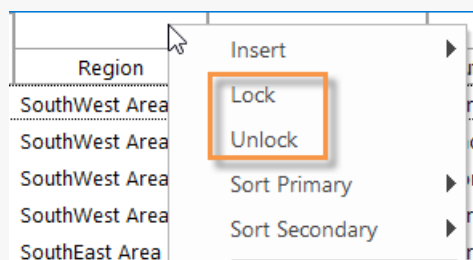
Tips:

Flat view is only available when auto-expand is turned on for the top-level dimension (1st By).



If you skip a level for auto-expansion, the view will stop expanding dimensions at that level, but will resume auto-expansion if you drill down or change the By to an expanded dimension.

By default, the flat view locks all dimension columns to the left. If the view has many dimension columns, you may want to unlock columns to allow full scrolling across the window.



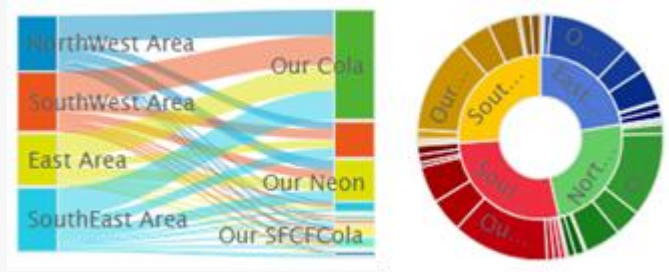
Flat view data is also available in some types of graphs, including:

- Comparative/Multi Comparative bar graphs - shows data for combinations of dimension members.



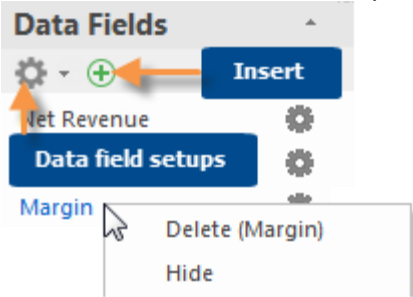
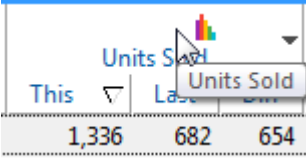
Tips:

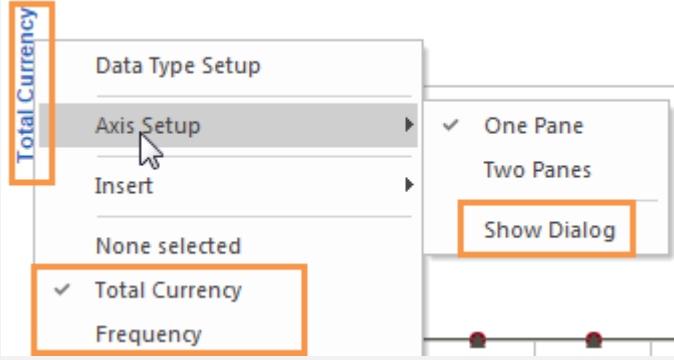

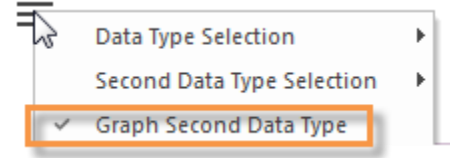
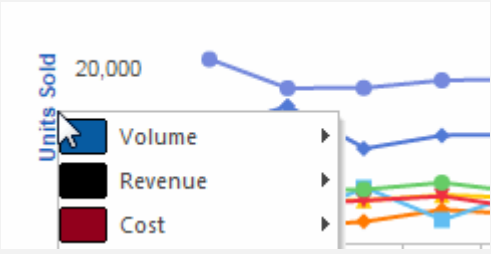
- Sankey & Sunburst - are Comparative Dimension Members graph types that use flat view data to represent the data hierarchy across multiple dimensions.



Select the data in graphs

In general, you can select the data fields in graphs using the following methods

Number of allowed data fields	General instructions for selecting data fields
<p>Unlimited data fields:</p> <p><i>Comparative percent change, Comparative Time Series percent change, Multi Comparative percent change, Mix</i></p>	<p>Insert data fields or select a setup with the desired data fields in the Data Fields area of the context panel.</p>  <p>These graphs may be limited by the graph setting for each data field; if you do not see a data field, you may need to turn on the graph setting using the graph pointer.</p>  <p>Depending on your preferences, the data fields shown in percent change graphs may also be limited by presence or absence of percent change or difference columns.</p>

Number of allowed data fields	General instructions for selecting data fields
<p>Limited to four or fewer axes (i.e., data families):</p> <p><i>Comparative actual value, Comparative Time Series actual value & ladder, Multi Comparative actual value, Normal Trend</i></p>	<p>These graphs show up to four data families (volume, unit currency, total currency, percent, etc.) and/or individual data fields—two along the left axis and two along the right axis. The graph will automatically include data fields within the first four families of data in the setup; however, you can configure each axis by clicking the axis label and selecting a data family or opening the dialog.</p> 
<p>Limited to one or two data fields at a time:</p> <p><i>Crosstab, Share Trend, Scattergram, Geo, Range, Exception, APM, Multi Comparative-2 and -4, Bubble</i></p>	<p>Select the data field(s) or test under Data Fields/Setup in the context panel.</p>  <p>For a Crosstab graph, you can choose the first or second data field by toggling the Graph Second Data type option.</p> 
<p>Multiple data fields in tables, but limited to one or two data fields in graphs:</p> <p><i>P&L, Line Item, Sankey, Sunburst</i></p>	<p>Add the data fields to the analysis. Click the axis label or heading to change the data field in the graph.</p> 

Key lists

A key list is a table showing individual members of a key (e.g., customers). A key list is created when you "Group By" the key.

Key members (e.g., customers or products) **# of members in list**

✖ Total Customer: 34

Descriptions, dimensions, and data fields

	CustName	CustCity	This ▾	Units Sold			Net Revenue			
				Last	Diff	% Chg	This	Last	Diff	% Chg
70466	S NEWBURG DIST # 715	CORTLAND	19,971	16,906	3,065	18.13	\$142,821	\$132,568	\$10,253	7.73
11901	VILLAGE NORTH CG/# 15	CORNING	19,592	17,202	2,390	13.89	\$143,281	\$130,113	\$13,168	10.12
11908	VILLAGE NORTH # 17	ITHACA	16,684	14,341	2,343	16.34	\$131,467	\$115,292	\$16,175	14.03
70481	S NEWBURG DIST # 155SS	ELMIRA	16,244	13,213	3,031	22.94	\$115,009	\$105,948	\$9,061	8.55
70469	NEWBURG DIST # 935	BATH	12,964	10,686	2,278	21.32	\$94,271	\$86,422	\$7,849	9.08
70463	S NEWBURG DIST # 245BF	ELMIRA	12,851	12,018	833	6.93	\$91,572	\$91,125	\$447	0.49
11904	VILLAGE NORTH # 07	ELMIRA	12,618	11,621	997	8.58	\$93,781	\$90,412	\$3,368	3.73
11902	VILLAGE NORTH # 71	HORNELL	10,883	8,954	1,929	21.54	\$78,667	\$65,647	\$13,020	19.83
70205	OBECK INC #4801	ELMIRA	9,713	11,422	-1,709	-14.96	\$74,306	\$84,084	(\$9,778)	-11.63
70208	OBECK INC #5901	CORTLAND	9,227	10,421	-1,194	-11.46	\$72,956	\$79,099	(\$6,143)	-7.77
	#6111	CORNING	9,222	9,888	-666	-6.74	\$71,191	\$73,308	(\$2,116)	-2.89
Totals			252,942	247,952	4,990	2.01	\$1,921,998	\$1,909,463	\$12,535	0.66

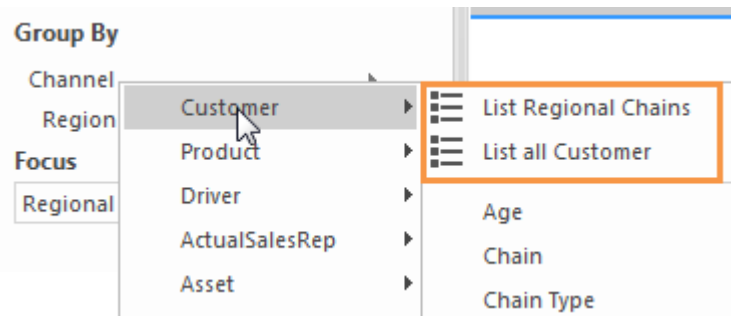
Key property

To list key members

1. Click on the analysis window and then click the top level under **Group By** in the context panel.
2. Select the key, and then select a List option.

The first list option filters the data based on the selected focus. (e.g., only customers in the regional chains channel).

The second option (**List all** or **List for all**) turns off the focus and lists all members.



Tips:

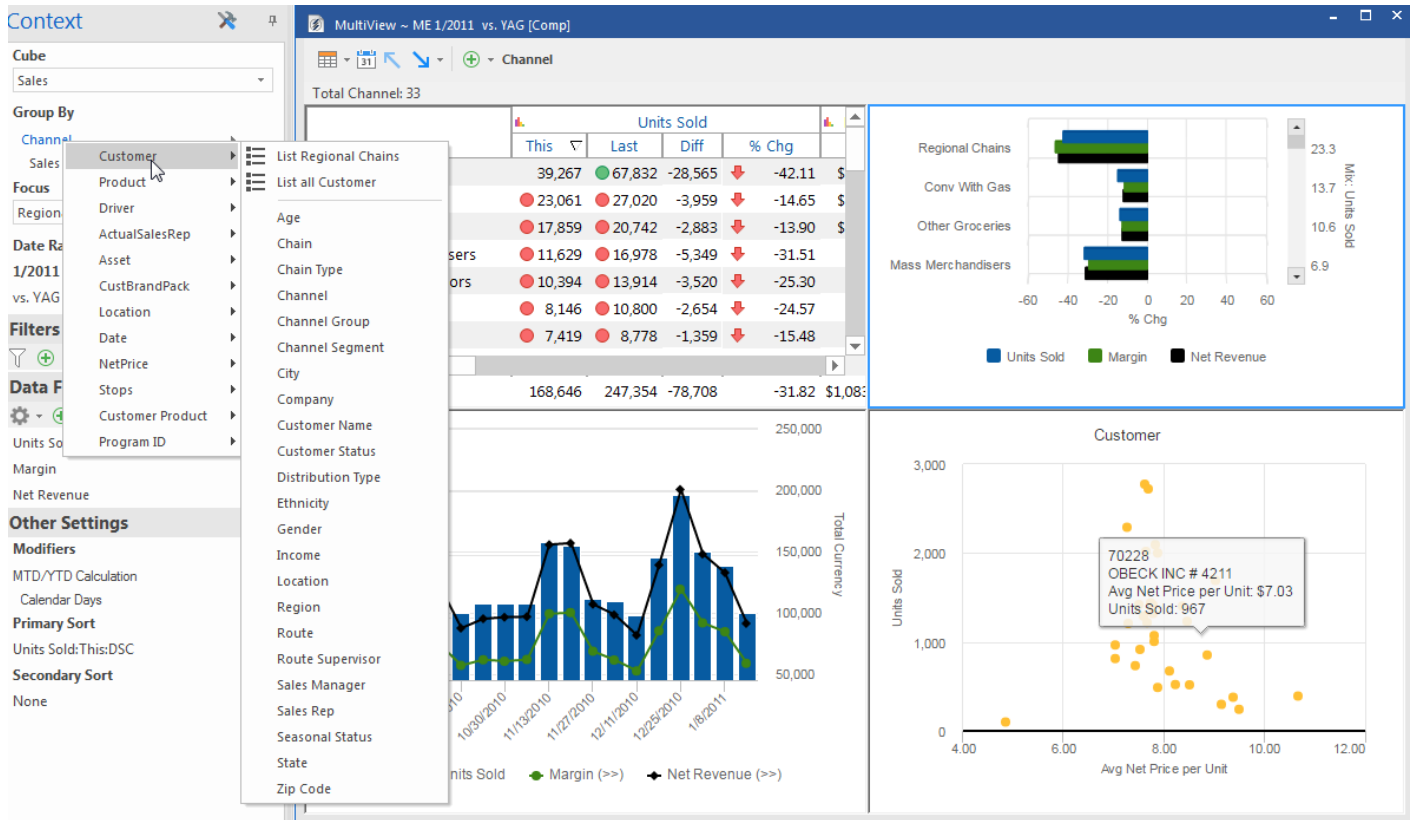
If you don't see the key listed in the Group By menu or dialog, you may need to change the data cube.

You can [insert data](#) (see page 17), change the setup, and more to change the columns included in the key list.

To close the key list, click the ✖ Turn-Off icon at the top of the key list or under Group By in the context panel.

MultiView

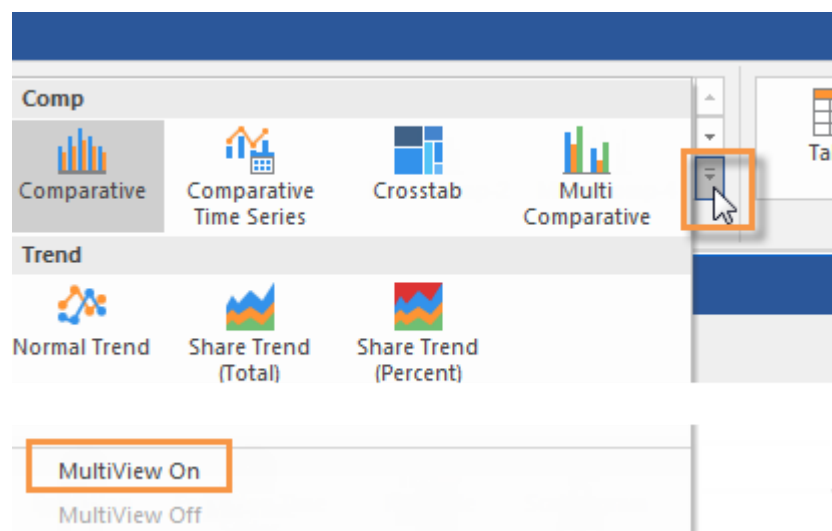
MultiView lets you control multiple analyses within one window with a single set of context settings. When you change the context (By, focus, filters, etc.), SIM updates all the panes in the window accordingly.



To turn on MultiView

1. In the Main tab of the ribbon, expand the Analysis area and click the **MultiView on** option at the bottom.

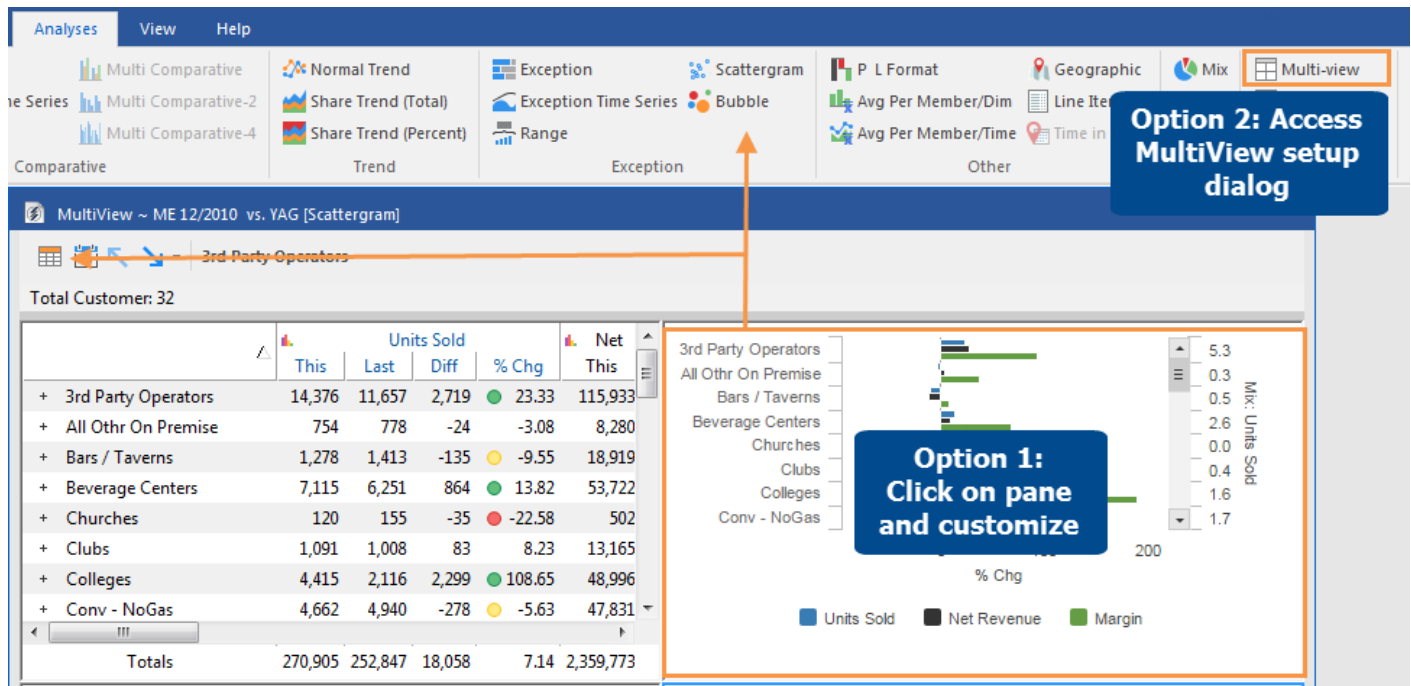
If the window is not already split, turning on MultiView splits the window into four panes using the default settings. You can also use the window options (located under Window on the main tab of the ribbon control) to split the window into your preferred configuration, such as four-pane, two-pane-horizontal, or two-pane vertical.



2. Customize the analysis type and view type of any individual pane using either of the following methods:

Option 1: Click on a pane and then make the desired changes using the ribbon control, analysis toolbar, and other controls (see below).

Option 2: Set up MultiView panes from a dialog (click the **Multi-view** button on the Analyses tab to access). This method also allows you to customize the time comparison and setup for each pane.



MultiView date ranges

MultiView allows you to define two date ranges—one set (This/Last) for comparative panes and another range for time-series panes. When you change the comparative date range, SIM updates all comparative panes; when you change the time-series date range, SIM updates all time-series panes.

Tips:

You can split a window without turning on MultiView; however, the panes will be limited to a single analysis type.

Multi Comparative-2, Multi Comparative-4, and Multi Comparative analyses are not allowed as part of a MultiView window.

To turn MultiView off, in the Main tab of the ribbon, expand the Analysis area and click the **MultiView off** option at the bottom

Advanced options for saving and sharing

Storyboards

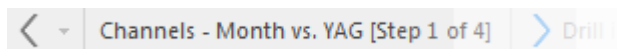
View a storyboard

Storyboards allow you to follow a path of investigation through pre-configured views or "steps" that can each have their own analysis type, view type, and other settings. When you view a storyboard, you can drill on whatever item(s) interest you to go to the next step, which filters out all other data.

To view a storyboard


1. In the storyboards section of the bookmarks and storyboards panel, click on the name of a storyboard to open it. The selected window then shows the starting point or "initial step" of the storyboard in storyboard viewer mode.

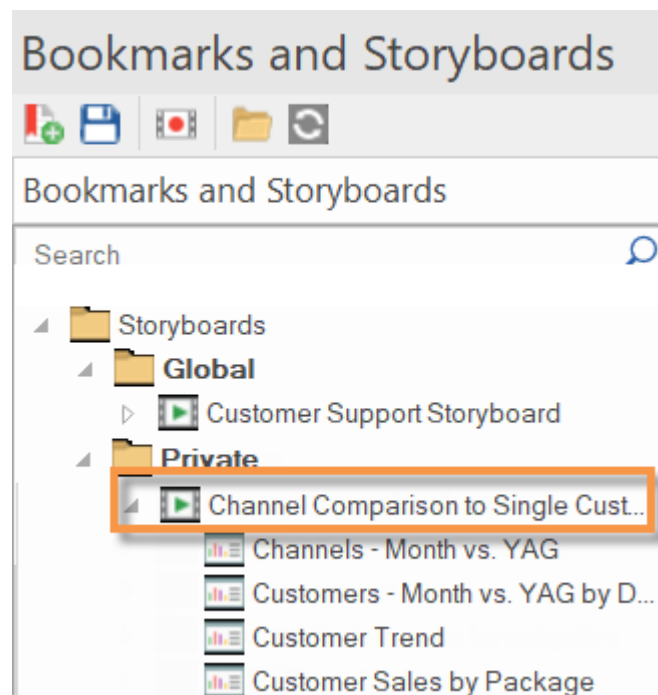
In storyboard viewer mode, the storyboard viewer toolbar appears on the screen.



In this mode, analysis types and some other controls are disabled because the storyboard controls the analysis type and other settings.

2. Move through the steps in the storyboard. In general, you can double-click on an item or date to drill down. Continue to move through the storyboard until SIM notifies you that you have reached its end.

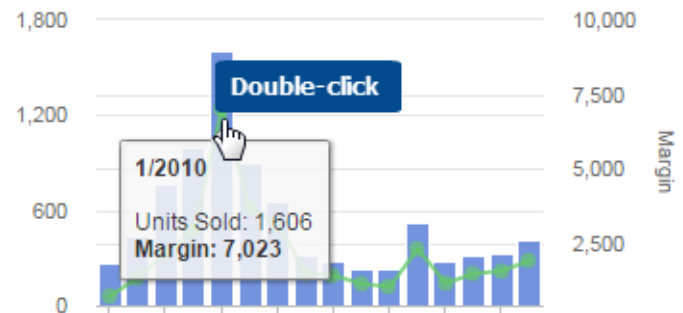
Tip: At any time, you can duplicate the current window by clicking  on the storyboard toolbar, and then follow your own path of investigation in the new window.



	Units Sold			
	This	Last	% Chg	T
Mass Merchandisers	23,893	18,932	● 26.20	
3rd Party Operators	14,376	11,657	● 23.33	
Drug Stores	9,370	7,332	● -23.68	
Industrial	9,370	10,583	● -9.52	
Fast Food	6,422	7,027	● -9.72	

Double-click

CustName	Units Sold			
	This	Last	% Chg	Diff
DISTRIBUTORS # 1405	292	1,088	● -73.16	-796
DISTRIBUTORS # 1505	400	1,001	● -59.14	-592
DISTRIBUTORS #	50	1,000	● -100.00	-550
DISTRIBUTORS # 7185	304	754	● -59.68	-450
DISTRIBUTORS # 5885	383	768	● -50.13	-385
DISTRIBUTORS # 8985	367	681	● -46.11	-314

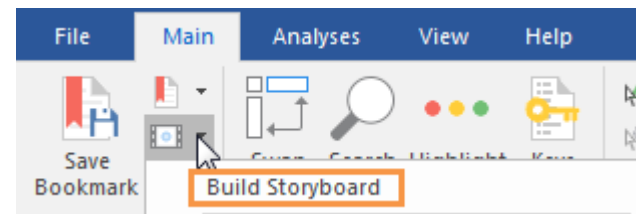


Create a storyboard

The first task in creating a storyboard is to set up its starting point or "initial step." You can then create the next steps in the storyboard by drilling, customizing, and saving each step.

To create a storyboard

1. Set up the analysis window to show the starting view of the storyboard by selecting the Group By, date range, analysis type, and any other parameters as necessary.
2. On the main tab of the ribbon control, click the storyboard drop-down button and select **Build Storyboard**.
3. In the **Create Storyboard** dialog, type a storyboard name and select from the following options, which are the same as options available for [bookmarks](#) (see page 39).



The 'Create Storyboard' dialog box contains the following elements:

- Storyboard Name:** A text input field.
- Ignore Focus:** A checked checkbox.
- Date Options:** A group box containing three radio buttons: 'Most Recent' (selected), 'Most Recent Complete', and 'Fixed Date'.
- Use current date:** An unchecked checkbox.
- Start Date:** A dropdown menu currently set to 'YTD'.
- Initial Step Name:** A text input field.
- Buttons:** 'OK', 'Cancel', 'Help', and 'Create in »'.

4. In the **Initial Step Name** box, type a name for the starting point of the storyboard.
5. Click **Create in**; then select the folder where you want to save the storyboard. If you have rights to create global user data, you can make a storyboard available to other users by saving it in a global category or one of its subfolders.

6. Click **OK**.

SIM saves the initial step and goes into storyboard builder mode so that you can create the next steps of the storyboard.

In storyboard builder mode:

- The storyboard builder toolbar appears on the screen.



- Toolbar buttons and other controls are enabled or disabled based on what you are currently allowed to do.

7. *Drill down* - If the next step should drill down, you can double-click on the member or date. Note that storyboard builder does not store the specific item(s) on which you have drilled down; instead, SIM will allow the user to select the item(s) when viewing the storyboard. If the next step does not drill down, proceed to Step 8.

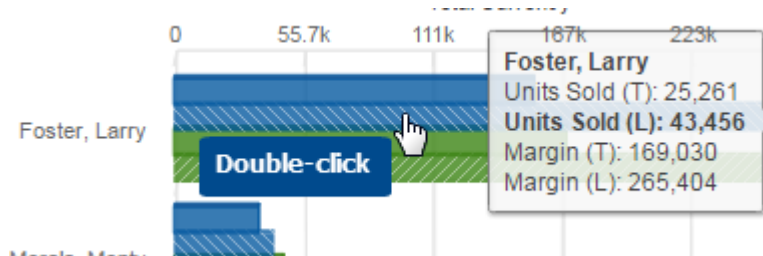
		Units Sold			
		This	Last	% Chg	Diff
+	SouthEast Area	45,246	66,844	● -32.31	-21,598
+	SouthWest Area	40,085	56,164	● -28.63	-16,079
+	NorthWest Area	30,941	50,024	● -37.14	-19,382
+	East Area	13,269	21,428	● -27.03	-13,683
+	Near West Area	305	112	● 172.32	193

8. *Configure* - Customize the storyboard step by making the desired changes. For example, you might change the analysis type, view type, By, data fields, sort, etc.

9. *Add step* - On the storyboard builder toolbar, click **Add Step**. In the **Add Storyboard step** dialog, enter the name of the step and click **OK**. You are now ready to create another step in the storyboard if you wish.

The interface shows a bar chart titled 'Total Currency' with a scale from 0 to 167k. A bar for 'Foster, Larry' is highlighted. A blue callout box labeled '8. Configure (e.g. table graph format)' points to the chart. Below the chart, a dialog box titled 'Add Storyboard step' is open, with 'Storyboard Step Name' set to 'Managers MTD and YAG' and the 'Ignore Focus' checkbox checked. A blue callout box labeled '9. Add step' points to the 'Add Step' button in the toolbar.

10. For each step in the storyboard, repeat Steps 7 through 9... drilling down, making changes, and then adding the step each time.



11. When you are finished creating steps, click **Save and Exit** on the storyboard builder toolbar.

After creating a storyboard, you should [view it](#) (see page 58) to test its settings.

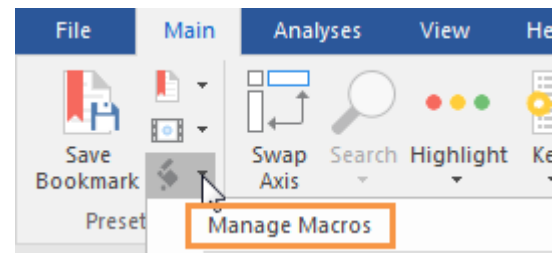
Tip: All components (setups, collections, etc.) of global storyboards must be global. If you are saving a global storyboard that includes private components (setups, collections, etc.), then you are prompted to make the private components global. In this case, SIM retains a private copy of the component(s), but uses the global component(s) in the storyboard.

Macros

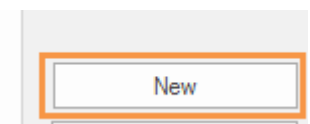
Macros allow you to quickly print, export, or email commonly-used views of the data. You can run macros within SIM whenever you wish and/or automate reports by [scheduling macros](#) (see page 65). Possible output formats include Excel, TXT, HTM, etc.

To create a macro

1. Set up an analysis to use the By, date, focus, sort, modifiers, collections and any other parameters of the view you want to export or print.
2. On the main tab of the ribbon control, click the macro drop-down button and select **Manage Macros**.



3. In the **Manage Macros** dialog, click **New**.
4. In **Analysis** tab of the **Macro** dialog, type a macro name.
5. Select from the following date options, which are the same as the [bookmark date options](#) (see page 39).

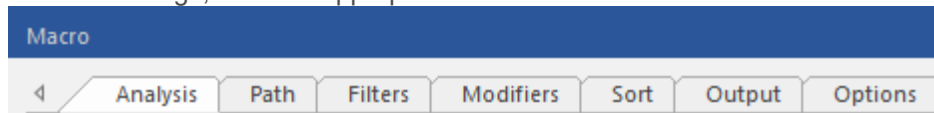


 A screenshot of the 'Macro' dialog box, 'Analysis' tab. The 'Name' field contains '12 Months vs.YTD'. The 'Report Type' is set to 'Comparative'. The 'Date Options' section shows 'Most Recent' selected, 'Fixed Date' with 'ME 6/2012 - 5/2013', and 'Start Date' set to 'Adjusted'. An orange arrow points from the 'Report Type' label to the 'Comparative' dropdown.

Tip: You can leave the Report Type options as is unless you want to change the analysis type, data fields, or specific date options, such as resolution and number of dates, from the analysis you configured in Step 1.

To create a macro (continued)

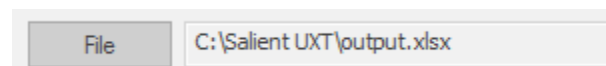
6. By default, the macro uses the same settings as the analysis configured in Step 1. If you want to change any of these settings, click the appropriate tab and do so.



- Analysis - analysis type and data field setup.
- Path - Group By, focus, drill path, and output FOR EACH dimension member.
- Filters - collections, single member filters, and output FOR EACH key member.
- Modifiers - math options, calendar days, etc.
- Sort
- Output - table/graph, key list settings, and output options (e.g., print or save file)
- Options - additional options related to expanding members , highlight settings, hidden fields, and more.
- Email (if configured) - settings for emailing macros results (see Step 8).

7. To select the output type, click the **Output** tab.

Under **Output Options**, click **Save As** if you want the macro to export the results to a file(s). Choose from file options to control names, columns, and display settings for the output file. Then, click the **File** button to specify the file type, name, and location.



Or, choose **Printer** if you want the macro to print to your default printer. With this option selected, you cannot email macro results.

8. If you want the macro to email results, click the **Email** tab and select settings for emailing the results. Your administrator must enable this option in order to access this tab.
9. Click **OK**.

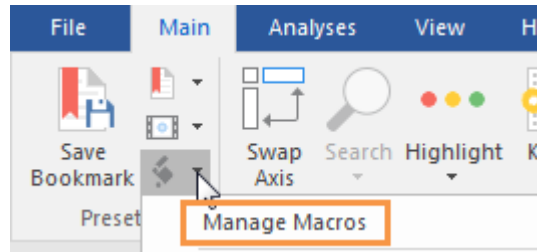
Scheduled macros

Enable scheduled macros and enter status email settings

You can schedule a macro to run automatically using a task scheduling program and the parameters provided by SIM. A scheduled macro outputs the results to a file or email based on the specifications in the [macro output](#) (see page 62) and email settings. The following setup is required before you can [schedule a macro](#) (see page 65).

To enable macros and enter status email settings

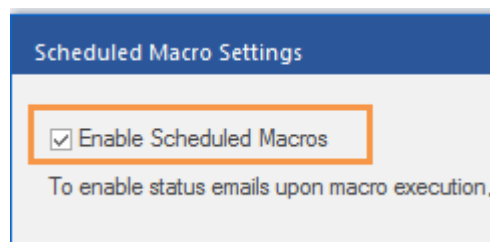
1. On the main tab of the ribbon control, click the macro drop-down button and select **Manage Macros**.



2. In the Manage Macros dialog, click the **Schedule** button.



3. In the **Scheduled Macro Settings** dialog, check the **Enable Scheduled Macros** box.



4. Enter the following information to set up the status emails for all scheduled macros. These are not the same as the email settings for the results emails sent by macros.
 - **Outgoing Mail Server (SMTP)** - Select a server that has been entered by your administrator or enter a server.
 - **From Address**
 - **To Address(es)** - When entering multiple addresses, separate them with a semicolon (;).
 - **Subject**
 - **User Name** and **Password** (for a secure SMTP configuration only) - Enter the User Name and Password of an authorized account on the SMTP server if this information is not already populated. The credentials will be saved for other email setup areas of SIM and the Administrator's Utility.
5. Click OK.

Schedule a macro

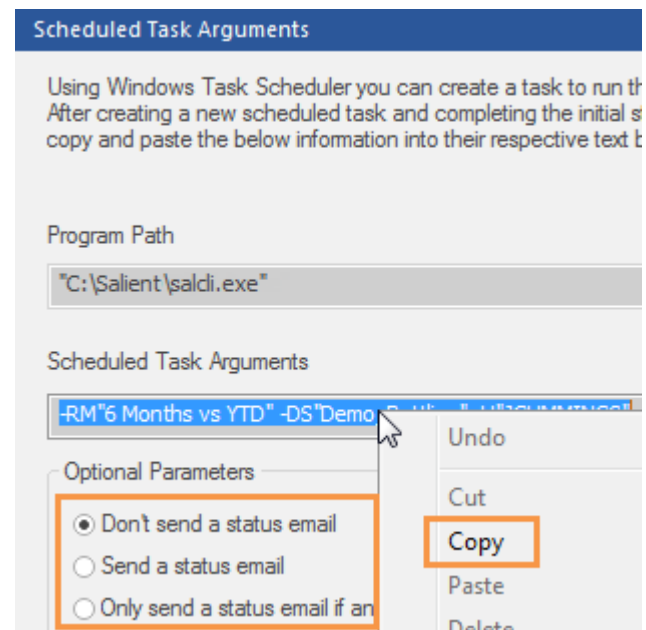
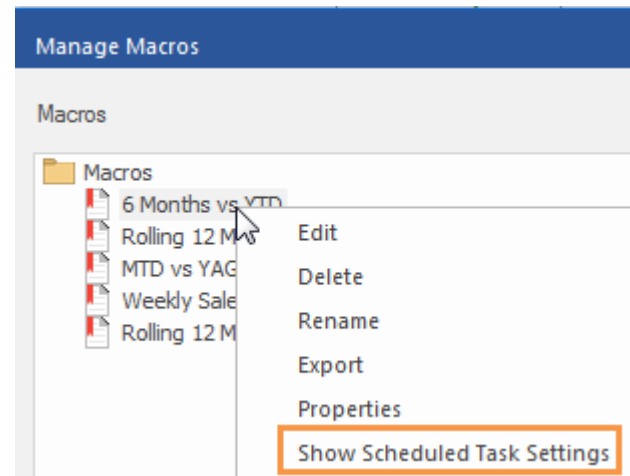
If you have enabled [macros](#) (see page 64) in SIM, you can schedule the macro in your preferred task scheduling program.

To schedule a macro

Follow instructions in the task scheduling program to create a scheduled task.

To access the necessary information to set up the task, including program path and scheduled task argument:

- Right-click on the macro or folder of macros in the Manage Macros dialog and select **Show Scheduled Task Settings**.
- In the **Scheduled Task Arguments** dialog, in the **Optional Parameters** section, choose an option for sending status emails. The selected option will populate the arguments shown in the dialog.
- Copy and paste the program path and arguments from the Scheduled Task Arguments dialog into the task scheduling program. To copy, select the text in the dialog, right-click, and choose **Copy**.



Tips:

Before you can run a scheduled macro that is stored in local user data, you must force a macro save, either by clicking the **Save** button in the **Manage Macros** dialog or by exiting SIM.

Scheduled macros cannot print. Any macros set up to print will be skipped if run via a scheduled task.

You can schedule multiple macros to run at once if they are in the same folder. Right-click on the folder name to see its arguments.

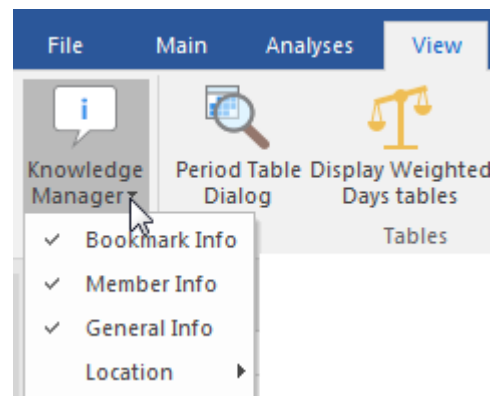
Knowledge Manager

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 panels

In the View tab of the ribbon control, click the Knowledge Manager button and then the name of the panel.

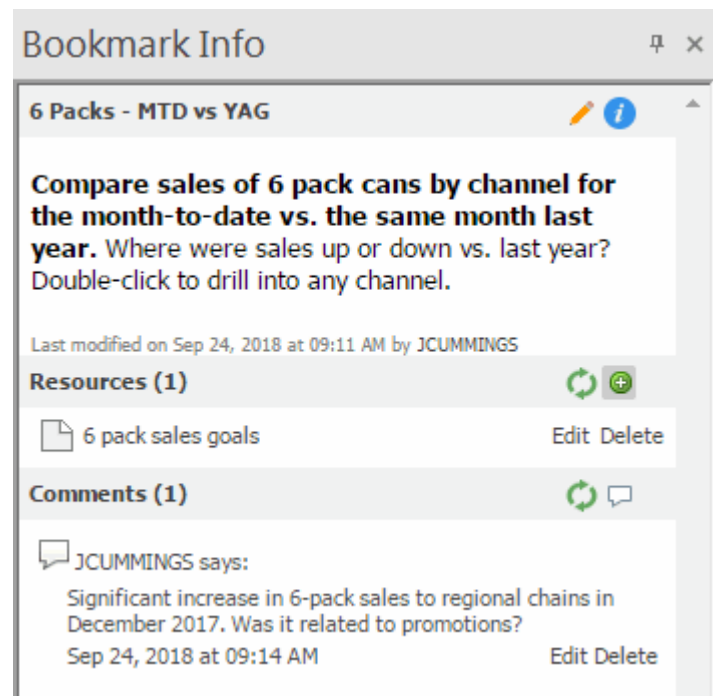
Knowledge Manager includes the following panels.



Bookmark Info

Allows users who create bookmarks and storyboards to write a descriptions and purposes for them.

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



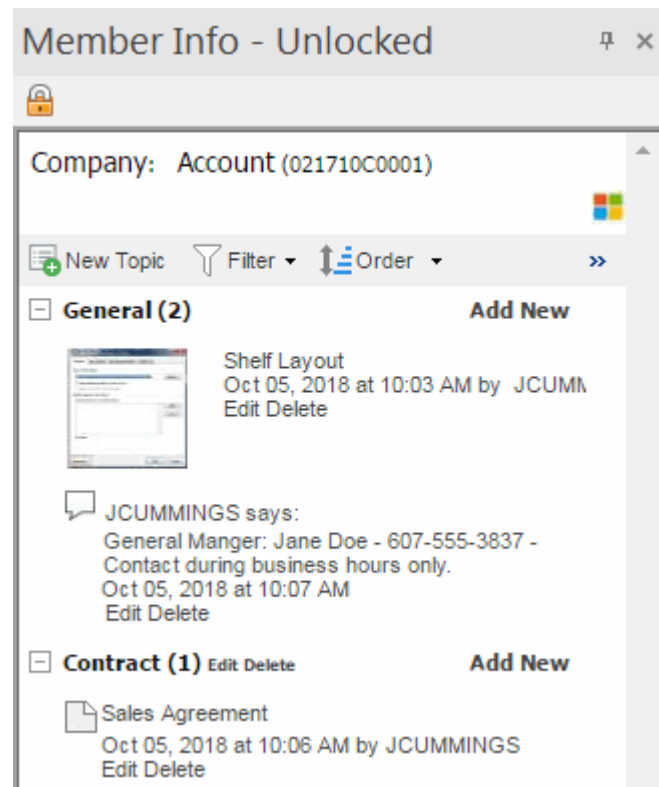
Member Info

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.

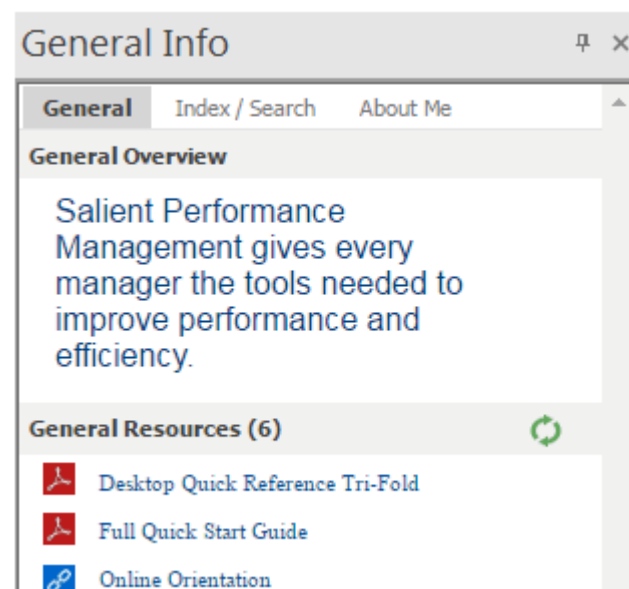
Non-media can be details on location, entry, specific contact info, or security issues.



General Info

General: 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, data fields, etc.).



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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