

November 21, 2018

# Salient Dashboards Salient Mobile User Guide

Version 1.8.1



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# Getting Started

## Download, install, and log in to Salient Mobile

You can download the app through the Google, Apple®, or Windows® public app stores.

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

### Requirements

- The mobile app requires Version 5.76 or higher of Salient Dashboards. To take advantage of recent enhancements, we recommend using Salient Dashboards Version 7.0 SP1 or higher.
- The mobile app can be run on any of the following mobile operating systems: Android™ v 5+ ; Apple (iOS9+); Windows 8.1

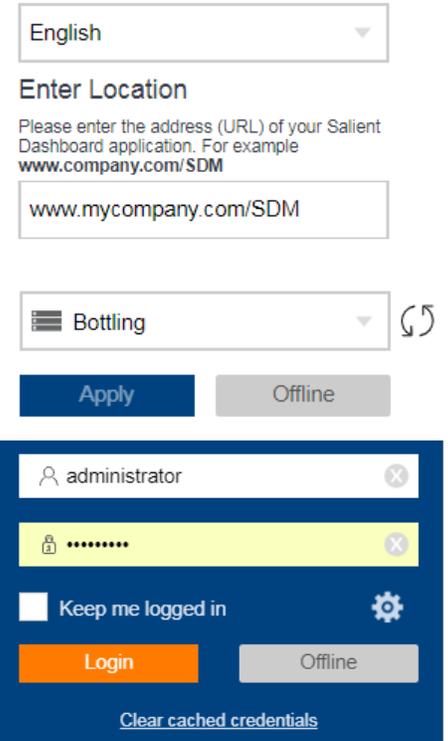
### Log in

The first time you start the mobile app, the login page may prompt you to enter the location of the Salient dashboards web application and select a dataset running at that location. You can also select a language in the setup area. (The language selection affects labels and menu options but not the dashboards themselves.)

You can then enter your user name and password.

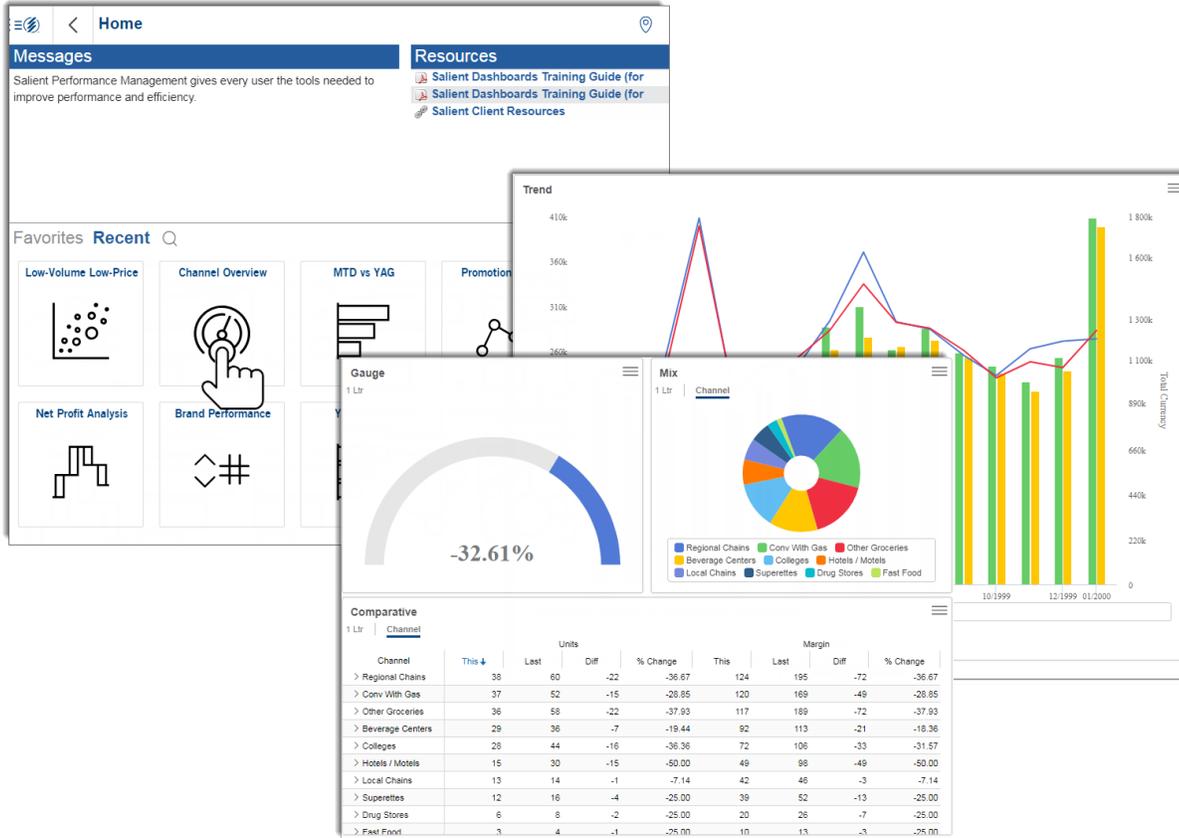
Your administrator may configure pre-populated login settings (iOS only).

**Tip:** At any time, you can click the gear button  in the login screen to go back to dataset setup.



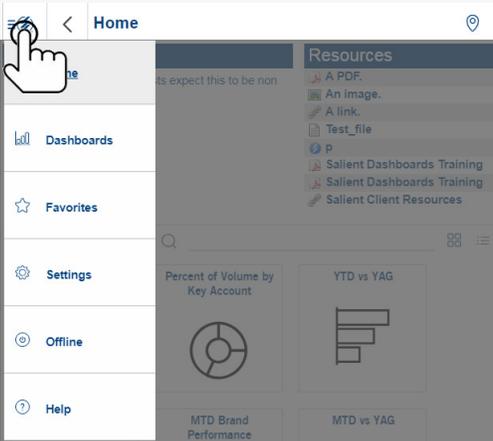
# Salient Mobile screens

After logging in, you should see the home screen. From here, you can open dashboards and select information just like in traditional web-based dashboards with the advantage of a simplified view that is touch-enabled and optimized for viewing on mobile devices.

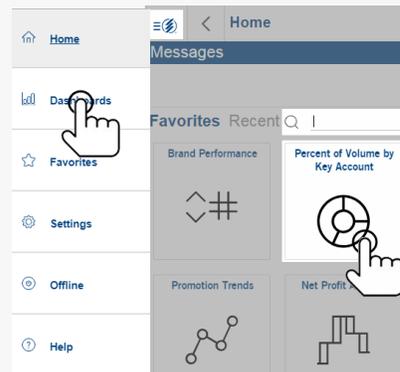


## Tips

Tap the icon in the upper-left corner to open the main menu.



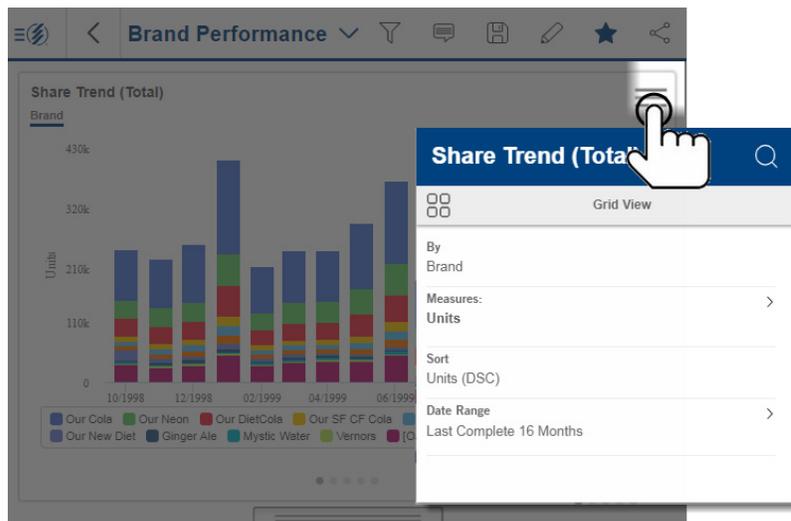
Tap on a dashboard to open it. Access recent and favorite dashboards on the home screen or go to a library of all published dashboards. Search in either screen.



# View and change details

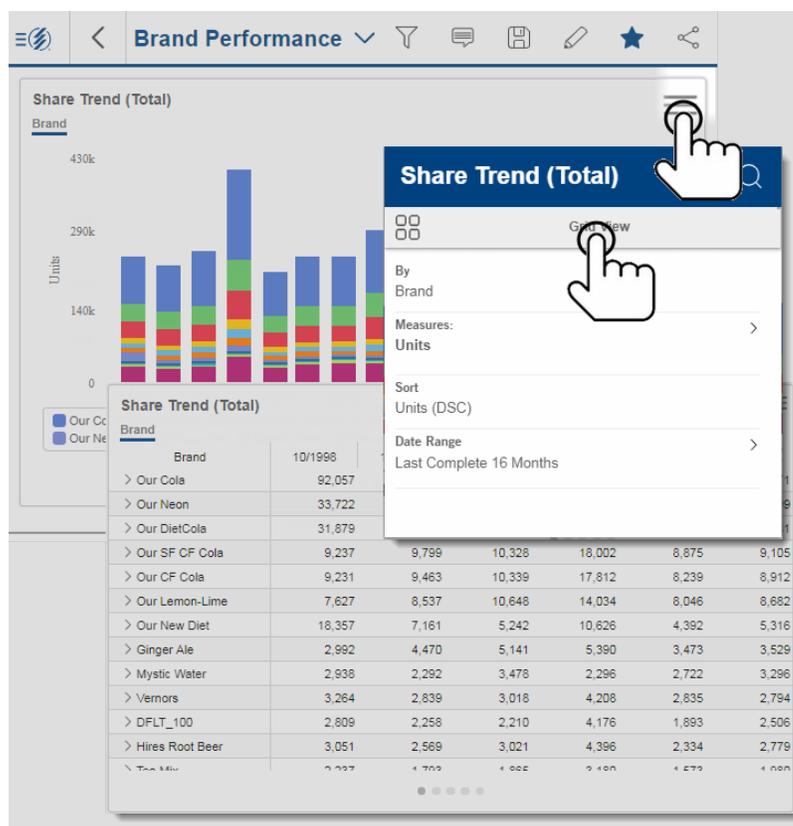
After opening a dashboard, you can view and interact with it to find the exact information needed.

Tap the icon in the upper-right corner of a widget to view details, such as the date range and filters. You may be able to change some of these settings.



## Pick a graph or grid

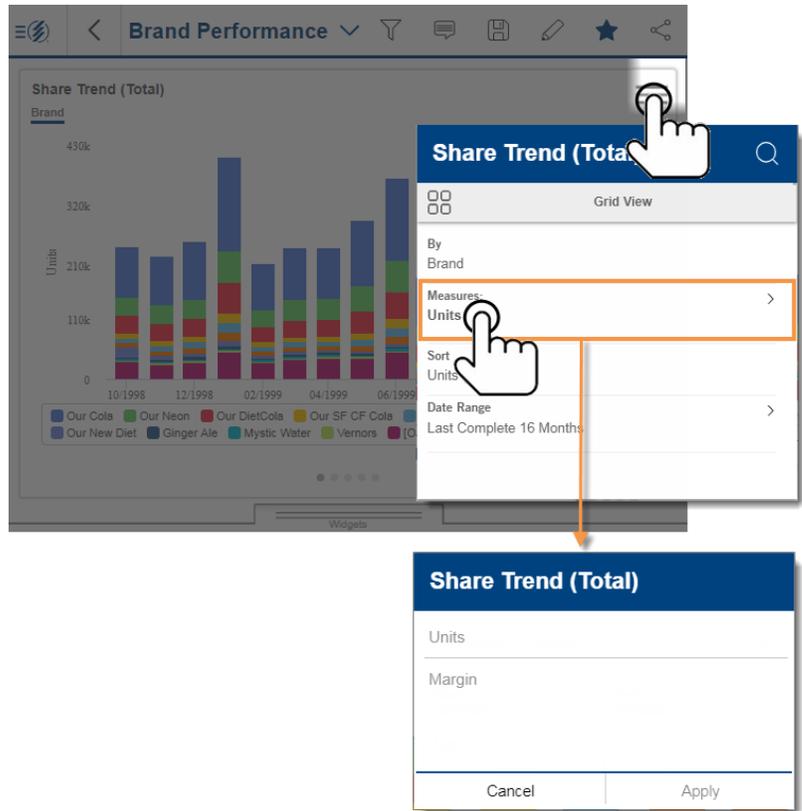
Choose a graph to visualize performance or look at the underlying numbers in a grid. You can toggle between these options in the widget details. Specific graph types, such as line, bar, pie, etc., are pre-built into the dashboard.



## Select measures

Pick and choose the measures to show in a widget. The available measures must be pre-configured by the dashboard builder.

In addition, measure selection must be enabled.

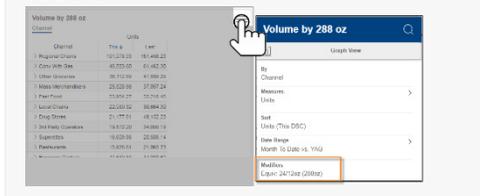
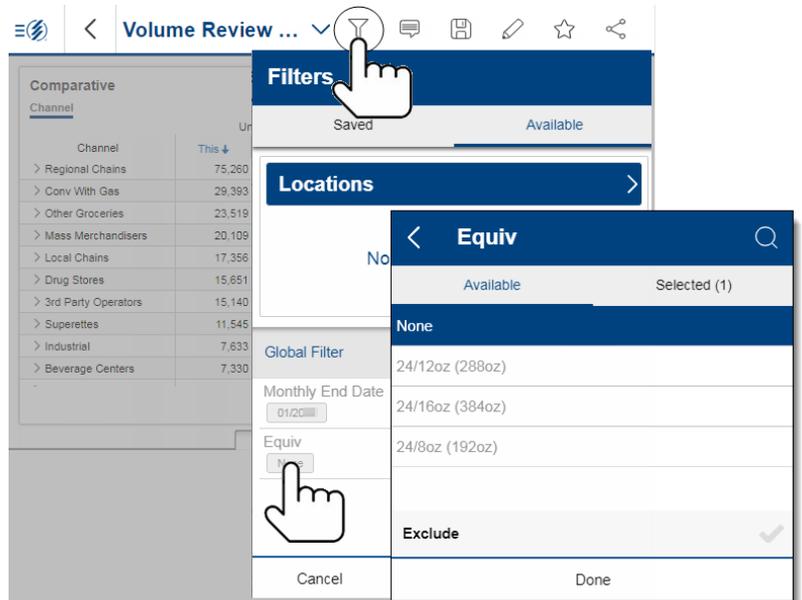


## Equivalents

Equivalents are a way to standardize data so that all units are worth the same amount. For example, you might express volume in terms of ounces or another standard measurement.

If an equivalent selector is pre-built into the dashboard, you can select equivalents to convert data across the dashboard. This menu is located in the filter panel.

**Tip:** A widget may have built-in equivalents that you cannot change. These would be listed in the widget details.



# Select dates

Dashboards show data for a range of dates (days, weeks, months, etc.) that can update nightly. Some widgets may also show an earlier date range to compare against. You may be able to change the dates depending on how the dashboard is configured.

## Basic date selection

Tap the upper-right corner of the widget and then tap on "Date Range" to change it. (Date selection must be enabled.)

You can then pick a start and end date for the range.

Date ranges are normally linked across a dashboard so that changing a date range in one widget affects other widgets.

The screenshot illustrates the process of selecting a date range for a widget. The main dashboard shows a 'Share Trend (Total)' widget with a bar chart. A settings menu is open over the widget, and the 'Date Range' option is selected. Below the settings menu, a date selection dialog is shown, allowing the user to choose a start and end date. The 'This Start' field is set to 10/1/17, and the 'End' field is set to 01/2019. A date selection table is visible at the bottom, showing 'September 2017' and 'October 2018' as options.

Month	Year
September	2017
October	2018

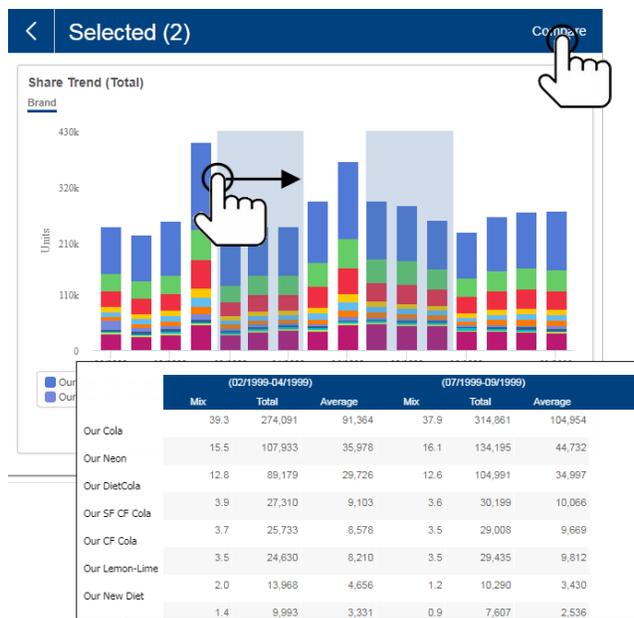
## Date selector menu

A date selector allows you to change the end date across all widgets in the dashboard. This menu must be pre-built into the dashboard and, if present, will be located in the filters panel.

The screenshot shows a dashboard titled 'Volume Review'. On the left is a bar chart showing '% Change' for 'Regional Chains' and 'Conv. With Gas'. On the right is a 'Filters' panel with tabs for 'Saved' and 'Available'. The 'Available' tab is active, showing a 'Locations' section and a 'Global Filter' section. The 'Global Filter' section has a 'Monthly End Date' dropdown menu open, showing a list of dates from 08/2017 to 12/2017, with '01/2018' selected. A hand icon points to the 'Filters' panel and the 'Monthly End Date' dropdown.

## Range selection in graphs

In time-based graphs, drag across any date ranges and then tap on "Compare" to see details.



# Group By

Pick an attribute for grouping the data. The resulting groups can be compared, ranked, and expanded. The available attributes must be pre-configured by the dashboard builder.

Comparative

Customer List

- Customer List
- Channel
- Package
- KeyAccount
- ZipCode
- City
- State
- DistributionType
- Status [Customer]

DustName	This ↓	Last
OP SHIPMENT	8,567	17,24
	7,028	8,13
#8022-01/V432596	6,982	9,73
CG/# 15	6,090	8,16
T # 715	5,001	8,80
	4,899	6,11
# 07	4,632	6,42
	4,305	5,20
T # 125	3,600	6,49
T # 935	3,567	6,06

# Sort

Tap a column header to rank results by name or measure. Tap again to reverse the sort.

Comparative

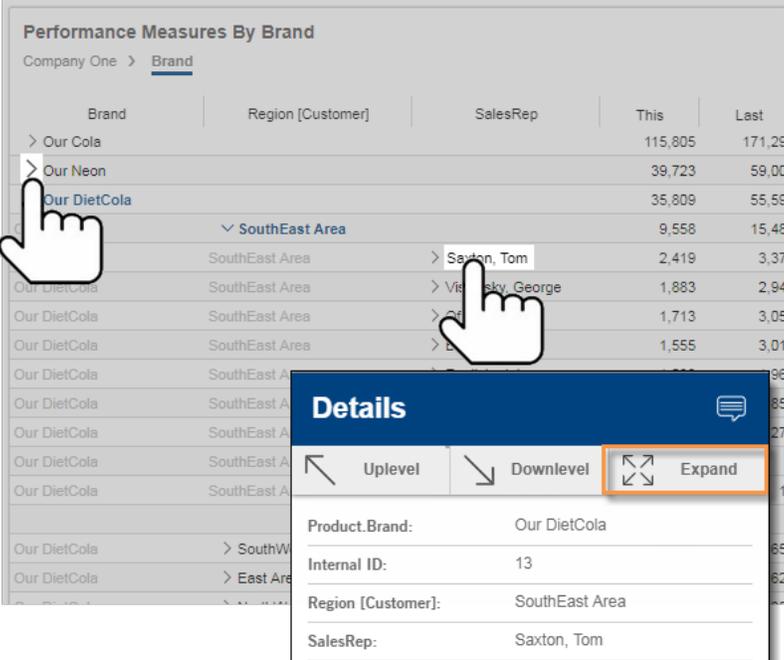
Channel

Channel	Units		Margin	
	This ↓	Last	This	Last
Regional Chains	72,106	115,504	282,234	426,029
Conv With Gas	29,148	38,590	176,649	232,179
Other Groceries	10,774	30,926	133,536	173,329
Mass Merchandisers	20,109	28,922	58,081	83,572
Local Chains	17,356	22,752	57,855	74,600
Drug Stores	15,651	38,702	51,818	109,784
3rd Party Operators	15,140	28,040	60,511	93,881
Superettes	11,545	14,146	48,500	58,808

## Row expansion

View multiple levels of data at the same time. Expand any row into the next member in the drill order.

Tap on ">" or tap the name and then choose to "Expand."



**Performance Measures By Brand**  
Company One > Brand

Brand	Region [Customer]	SalesRep	This	Last
> Our Cola			115,805	171,29
> Our Neon			39,723	59,00
Our DietCola			35,809	55,59
	▼ SouthEast Area		9,558	15,48
	SouthEast Area	> Saxton, Tom	2,419	3,37
Our DietCola	SouthEast Area	> Visky, George	1,883	2,94
Our DietCola	SouthEast Area	> C...	1,713	3,05
Our DietCola	SouthEast Area	> E...	1,555	3,01
Our DietCola	SouthEast A			36
Our DietCola	SouthEast A			85
Our DietCola	SouthEast A			27
Our DietCola	SouthEast A			1
Our DietCola	SouthEast A			85
Our DietCola	SouthEast A			82
Our DietCola	> SouthW			
Our DietCola	> East Are			

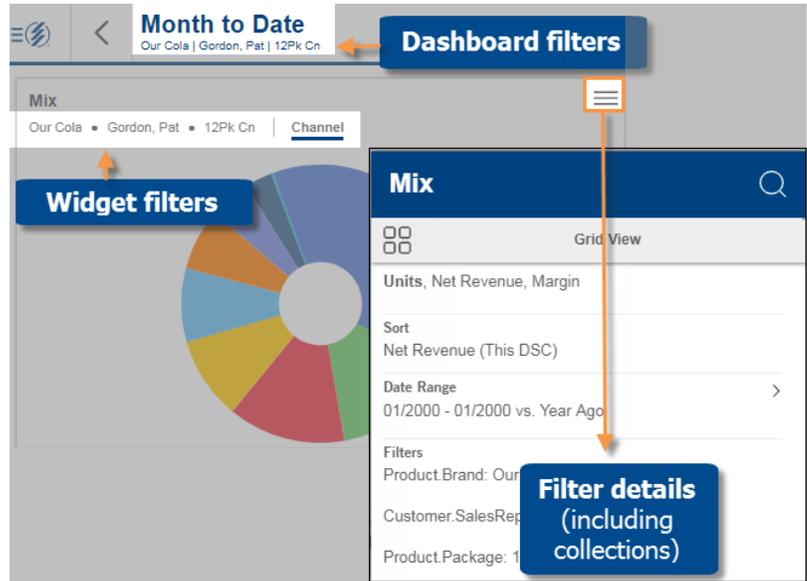
**Details**  
Uplevel Downlevel Expand  
Product.Brand: Our DietCola  
Internal ID: 13  
Region [Customer]: SouthEast Area  
SalesRep: Saxton, Tom

# Filter

At any time, a widget or dashboard may be filtered or narrowed down on a particular item or group of interest.

The dashboard title and breadcrumb path show a quick snapshot of filters that are currently applied. For a comprehensive list all filters, including any collections that are turned on, go to the widget details.

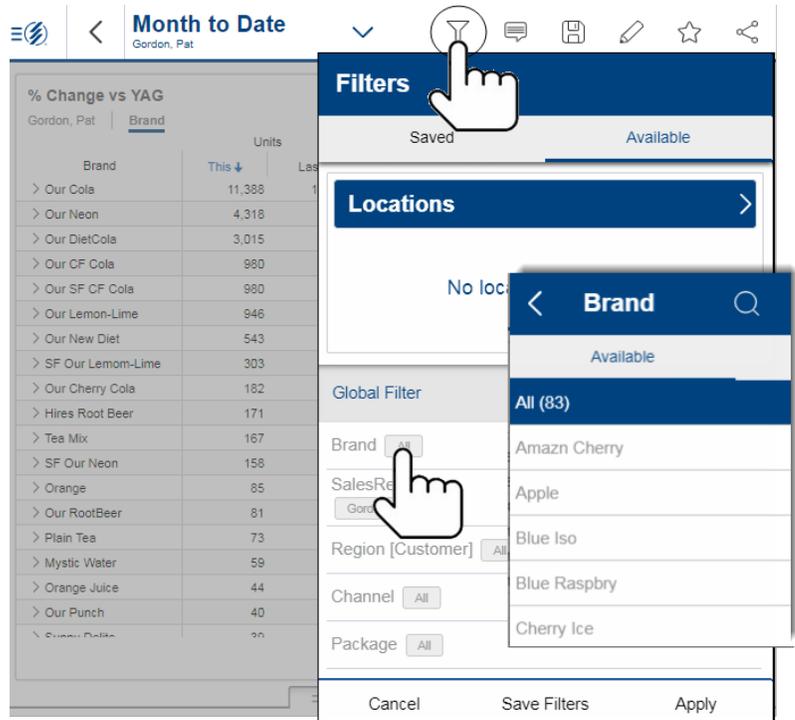
Several methods are available to narrow down or "filter" on the exact information needed:



## Filter menus

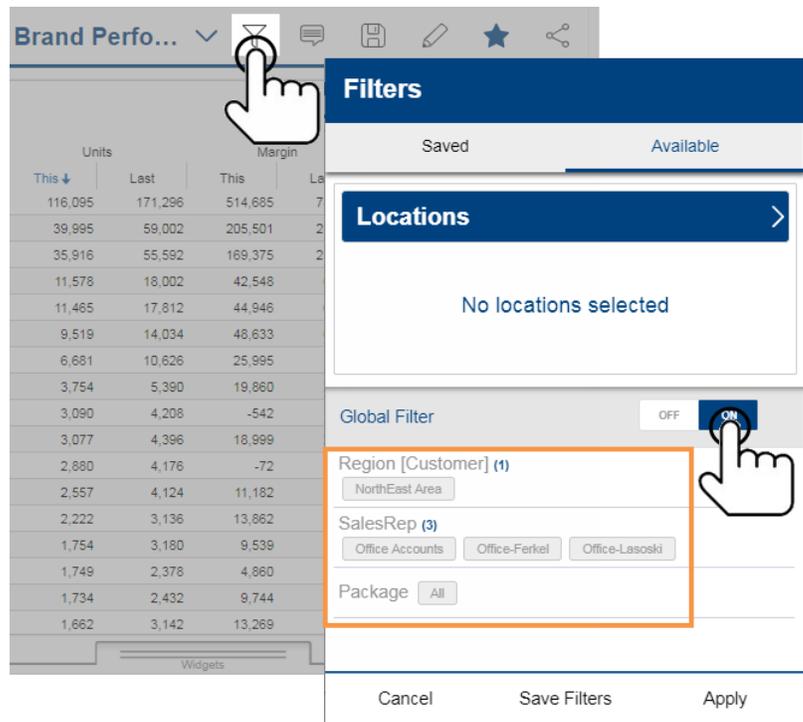
Go to the Filter panel to pick what you want to see from interactive menus. The menu must be pre-built into the widget. These filters work across the dashboard and can be saved or turned on globally.

**Tip:** To save filter selections for future use within the same dashboard, tap "Save Filters" at the bottom of the filter panel.

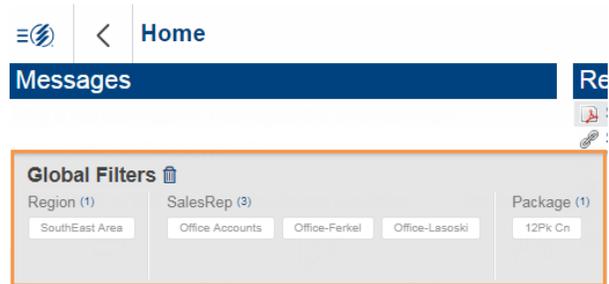


# Global filters

Turn on global filters to stay focused on any area of the business. The global filters will automatically be applied across all other dashboards that have corresponding filter menus. Global filter prompts can be turned on or off in settings (see page 22).



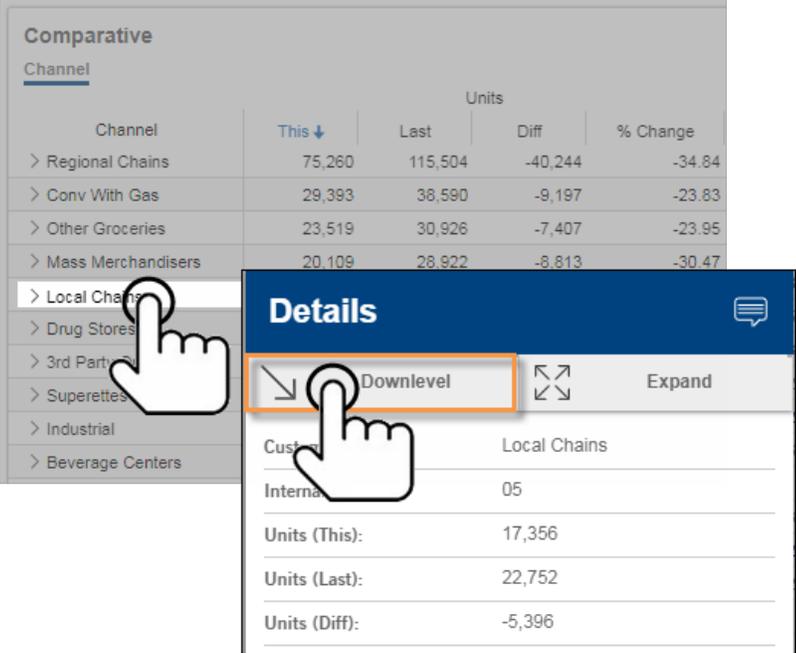
The home page shows which global filters are currently turned on.



# Drill down (downlevel)

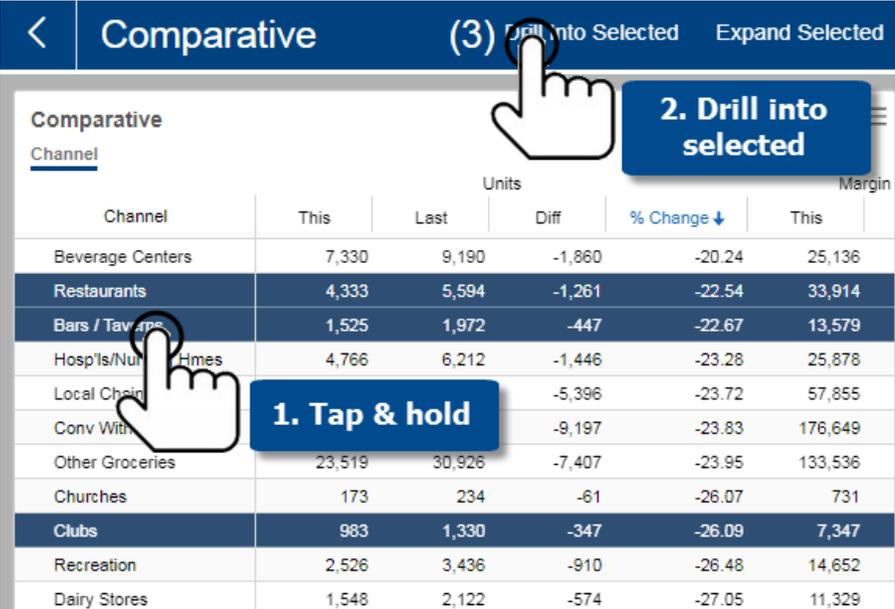
## Drill on a single item

Drill down to see details. Tap on whatever interests you and then choose "Downlevel."



## Drill on multiple

Drill down on multiple items to narrow down on them. Tap and hold to select; then choose the "Drill" option at the top of the screen.

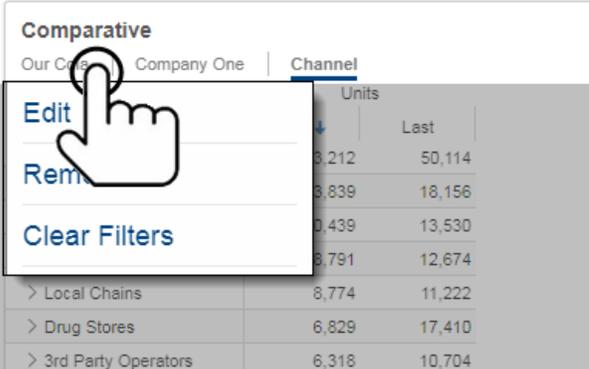


## Location filters

In addition to the filters listed here, dashboards may be filtered by one or more locations (see page 19).

## Other filters

A widget may have embedded filters that cannot be changed through the filter panel, but are available through the breadcrumb path. Just tap and select from the available options.



The screenshot shows a dashboard widget titled "Comparative" with a breadcrumb path "Our Company > Company One" and a "Channel" filter. A table displays data for "Units" and "Last". A dropdown menu is open, showing options: "Edit", "Remove", and "Clear Filters". A hand icon is pointing to the "Edit" option.

	Units	Last
	3,212	50,114
	3,839	18,156
	0,439	13,530
	3,791	12,674
> Local Chains	8,774	11,222
> Drug Stores	6,829	17,410
> 3rd Party Operators	6,318	10,704

# Share

You can share a specific dashboard with other users. Date selections, filters, and any other modifications will be preserved in the "shared" dashboard.

Tap the "Share" button and then "Send." You can then email a URL that opens the dashboard directly or copy it for future use. Additional apps may be available for sharing depending on the setup of your mobile device.

The screenshot shows a dashboard titled "Channel Overview" with a table of data. A modal titled "Share Dashboard" is overlaid on the table, showing two options: "Save" (represented by a downward arrow icon) and "Send" (represented by an envelope icon). A hand cursor is pointing at the "Share" button in the top right of the dashboard.

Channel	Units				Margin		
	This ↓	Last	Diff	% Change	This	Last	Diff
> Regional Chains							94
> Conv With Gas							30
> Other Groceries							93
> Mass Merchandisers							91
> Local Chains							46
> Drug Stores							66
> 3rd Party Operators							70
> Superettes							08
> Industrial							65
> Beverage Centers							72
> Fast Food							03
> Schools	6,736	9,524	-2,788	-29.27	36,532	51,674	-15,143
> Conv - NoGas	5,291	7,354	-2,063	-28.05	29,279	40,585	-11,305

# Knowledge Manager

Knowledge Manager enables users to share thoughts or “soft knowledge,” making it possible for your team to collaborate on the meaning behind the data. This information can be shared between all users across multiple devices in the Salient Mobile app, SIM, and browser-based dashboards (additional setup required).

## Dashboard Info

In the Dashboard Info tab, you can add descriptions, resources and comments related to a dashboard.

The screenshot shows the Knowledge Manager interface with the 'Dashboard Info' tab selected. The interface includes a top navigation bar with a 'Knowledge Manager' icon highlighted by a hand. Below the navigation bar, there are two tabs: 'Dashboard Info' and 'Member Info'. The 'Dashboard Info' tab is active and displays the following sections:

- Description** (with an 'Edit' button): Comparison of channel performance for MTD versus last year (matching number of days)
  - Sort grid to see biggest differences vs. YAG
  - Pie chart offers a quick visual of most significant channels.
- Resources(3)** (with an 'Add' button):
  - Channel Sales Rep Assignments
  - Channel Descriptions
  - Promotions by Channel 2017
- Comments (0)** (with an 'Add' button): No comments available.

## Member Info

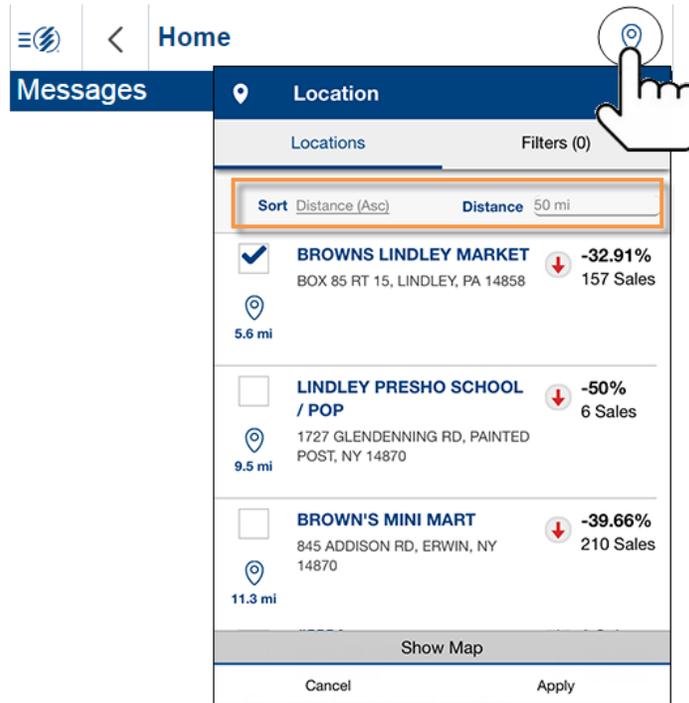
In the Member Info tab, you can add comments and resources to any selected member (e.g. customer, product, channel, brand, etc.)

The screenshot shows the Knowledge Manager interface with the 'Member Info' tab selected. A hand icon points to the 'Knowledge Manager' icon in the top navigation bar. The 'Member Info' tab is active and displays the following sections:

- Schools**: A section with a 'Back' button and a 'General' button, and an 'Add' button.
- JCUMMINGS**:
  - General contract
  - October 17, 2018 at 4:39 PM
- JCUMMINGS**:
  - Significant volume decline since 2015. Investigate new brand opportunities.
  - October 17, 2018 at 4:36 PM

# Locations

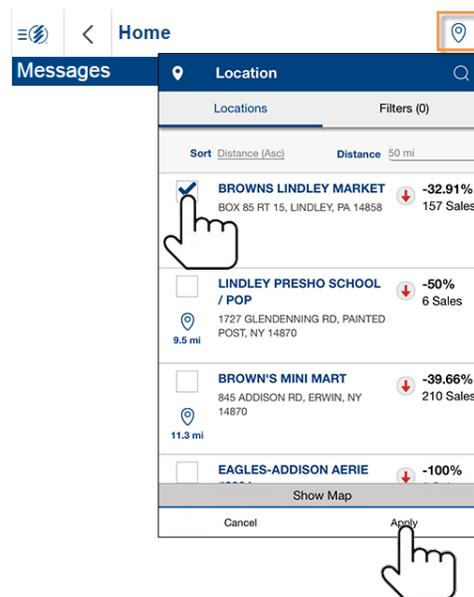
List locations that are nearby or within any map extent. Sort or filter the list by distance. Location services (see page 22) and additional server setup are required.



## Filter by location

Pick whatever locations interest you to turn them on as a filter across all your dashboards. This allows you to focus on the performance of any single location or a group of locations.

In the location panel, checkmark one or more locations; then tap on "Apply."

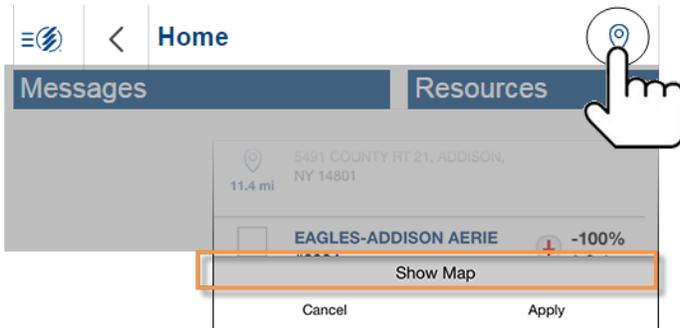


# Location map

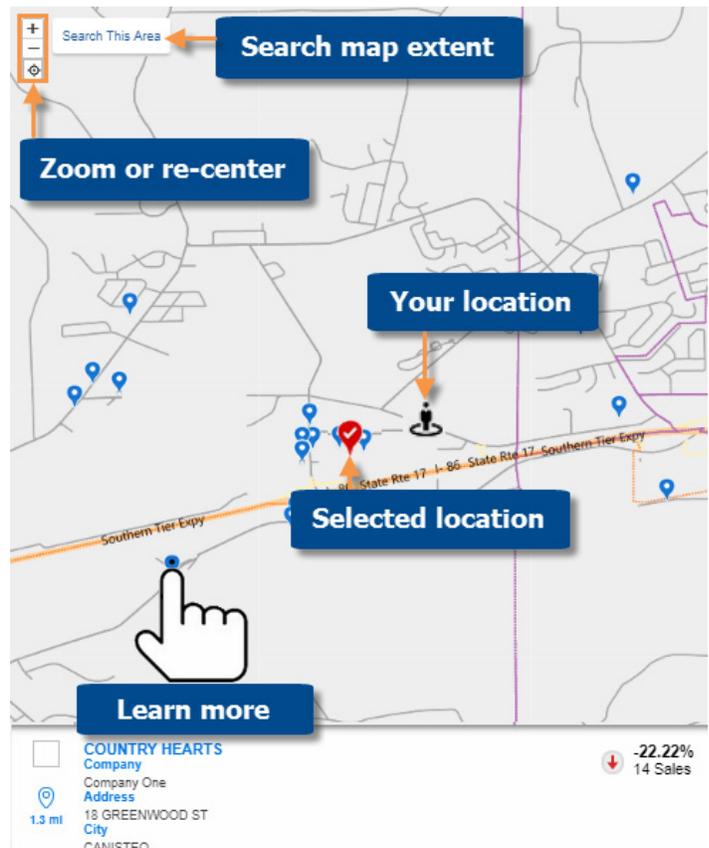
Turn on an interactive map of nearby locations. Additional setup is required.

To open a map

Open the location panel and then tap on "Show Map" at the bottom of the screen.



In the map, pan and zoom to see details; tap to learn more about any location; re-run the search within any map extent.

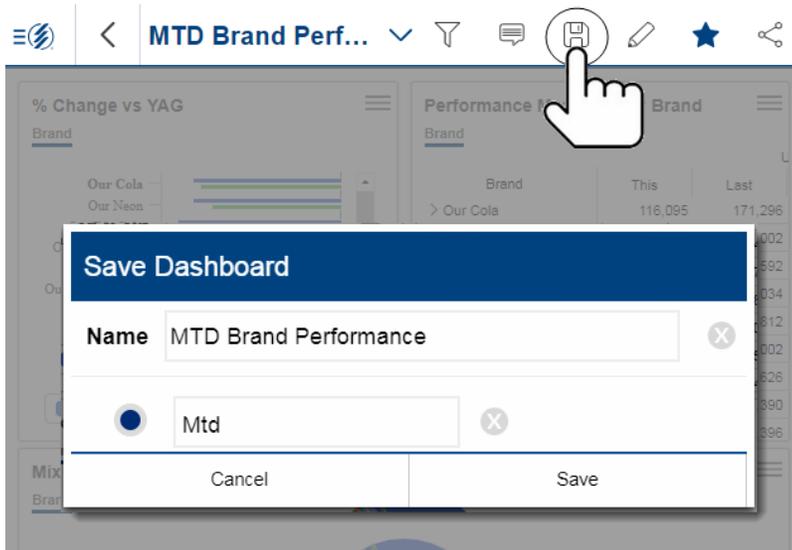


# Advanced

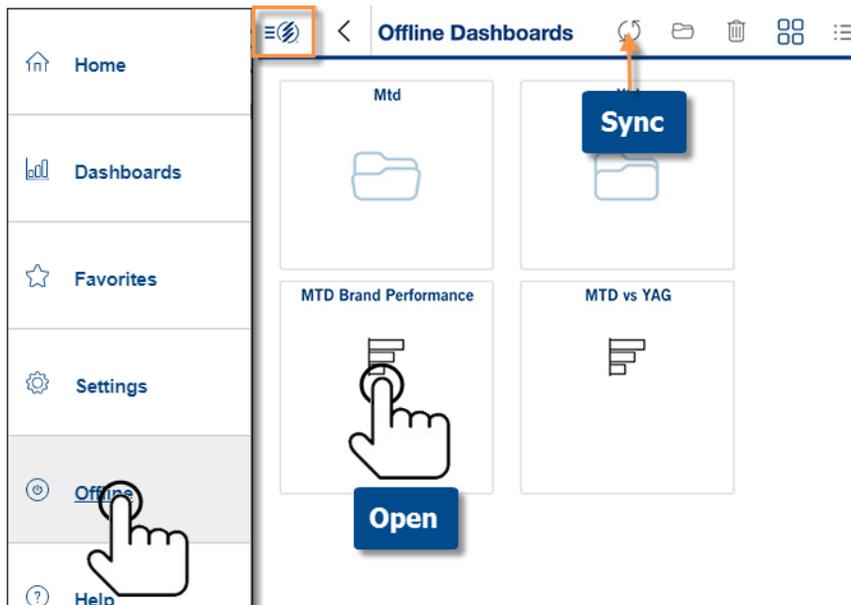
## Offline mode

Save dashboards to your phone or tablet for offline use. Dashboards can then be synced whenever you are back online.

First, save the dashboard.

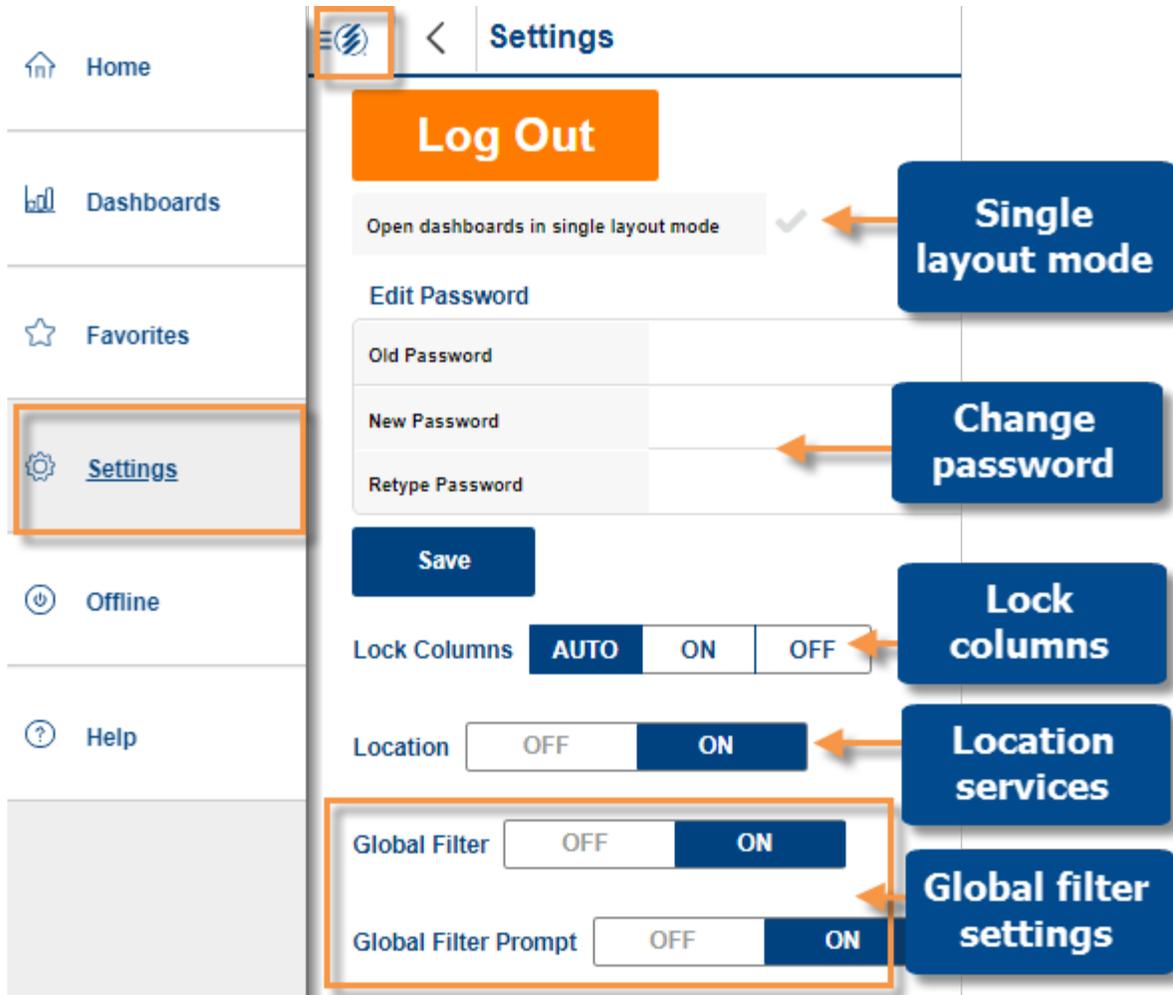


Then, go to offline mode where you can access the dashboard when you are offline and sync with the latest data when you are back online.



# Settings

The settings screen (accessed through the main menu) provides customization options and lets you log out.

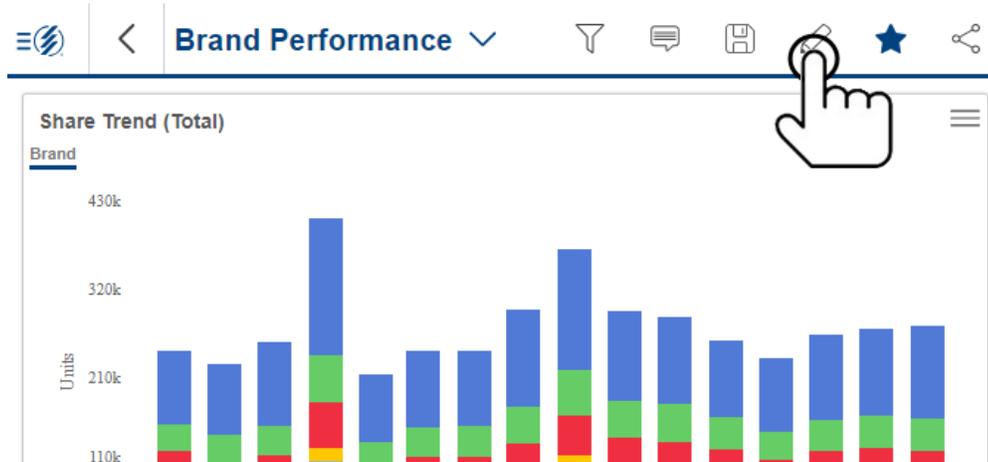


Setting	Explanation
Single layout mode	Turn on the checkmark to open all dashboards to a single, maximized pane (on) or turn off to use its mobile layout. Tap "Save" after changing this setting.
Password	Tap "Save" after changing your password. This also affects browser-based dashboards.
Lock columns	Control whether or not the name column is locked in place as you scroll.
Location	Enable/disable the nearby location feature (additional setup).
Global filter settings	Turn on/off global filtering and control whether global filters are automatically applied or you receive a prompt.

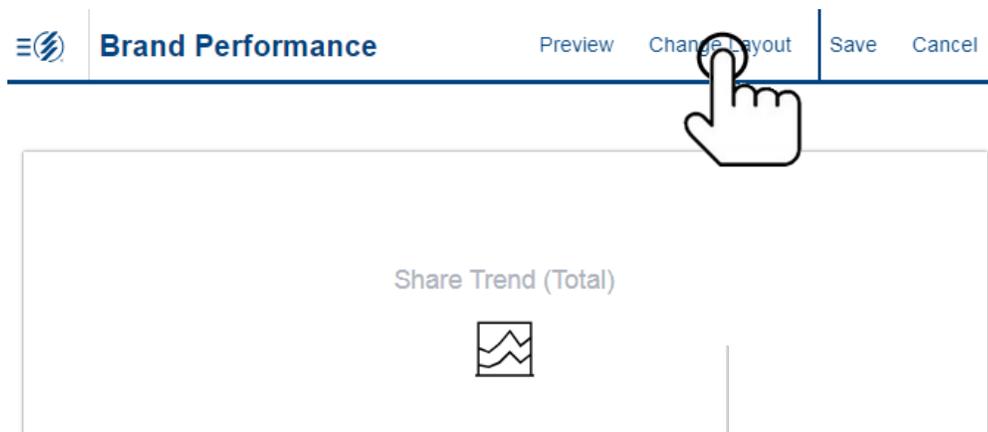
# Edit mobile dashboard layouts (optional)

The default layout of a dashboard is one pane that allows users to scroll through widgets in the dashboard. You can change the layout of any dashboard to show multiple panes. This step is optional and requires "publish" rights for your user account.

1. Open the dashboard and tap the edit button.

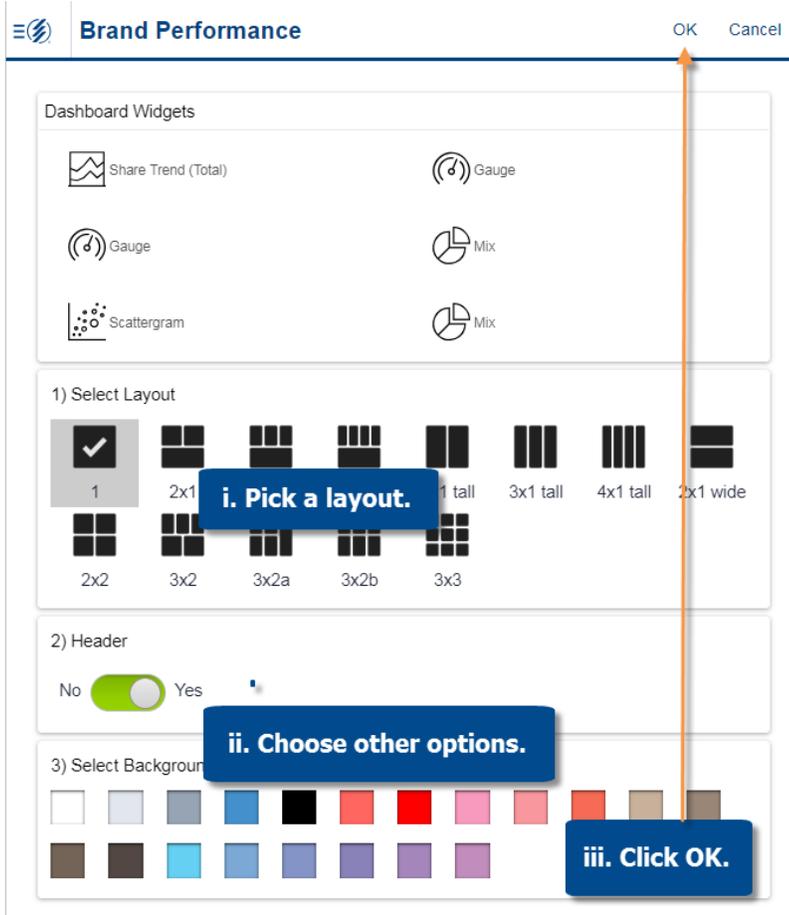


2. Next, tap on Change Layout to open the wizard.



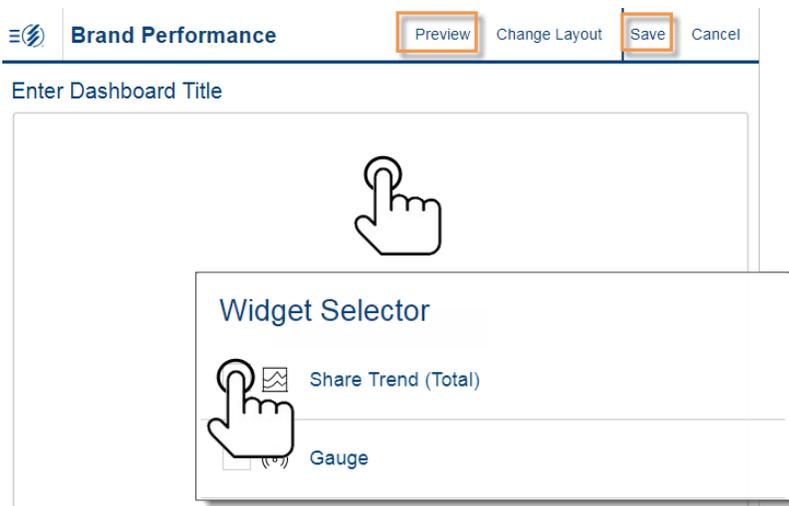
### 3. Select layout options in the wizard.

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



### 4. Select widgets to show in each pane.

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



# Mobile dashboard links

A mobile dashboard link allows a user to launch the mobile app and go directly to a dashboard. Mobile dashboard links can be saved for easy access to specific dashboards and shared with users via email, text messages, or other methods. Optional parameters can be included in the link to apply a filter (see page 26) or select a specific location (see page 27) in the location panel.

To determine the URL of a mobile dashboard link

## Option 1

Use the Share feature (see page 17) within the mobile app to determine the mobile URL, which can be copied from the resulting email message.



## Option 2

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

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

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

**View URL** or **Share**

**Replace with salient://**

Dashboard URL

`http://11.111.111.11/sdm/SDM.aspx?ds=PR-Demo_Bottling&view=viewer&categoryId=0&dashboard=Customer+Ranking`

Open Dashboard OK

## Parameters

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

Parameter	Explanation
ds	This is the name of the dataset. If omitted, the link will attempt to open the most recent dataset accessed by the user.
view	The "view" parameter is ignored by the mobile app.
categoryId	This identifies the category of the dashboard when it is identified by name.
dashboard	This is the name of the dashboard.
shareddashboard	This is a dashboard identifier that is automatically assigned when the dashboard is shared in the mobile app.
filters & filterValues	Refer to "Filters in mobile dashboard links" (see page 26).
locationSelectionHostCode & locationSelectionName	Refer to "Locations in mobile dashboard links" (see page 27).

### Basic examples

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

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

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

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

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

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

## Filters in mobile dashboard links

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

To apply a filter via a dashboard URL

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

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

- *key* is the internal name or id of the key associated with the dimension by which you want to filter.

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

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

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

### Example

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

The resulting dashboard would be filtered by customer 11901.

## Locations in mobile dashboard links

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

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

### To select a location via a dashboard URL

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

```
&locationSelectionHostCode=member_code
```

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

```
&locationSelectionName=display_name
```

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

## 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](http://www.salient.com).

