

Salient Mobile

User Guide

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Limited warranty

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Salient Management Company

203 Colonial Drive, Horseheads, NY 14845

(607) 739-4511

support@salient.com

www.salient.com

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Getting Started

Download, install, and log in to Salient Mobile

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 6.20 or higher of Salient Dashboards. To take advantage of recent enhancements, we recommend using the latest version of Salient Dashboards.
- The mobile app can be run on any of the following mobile operating systems: Android[™] v 5+ ; Apple (iOS9+); Windows 8.1+. Custom views are not supported on Windows.
- Notifications must be allowed if you wish to use the Notify feature.

Log in

Setup:

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.

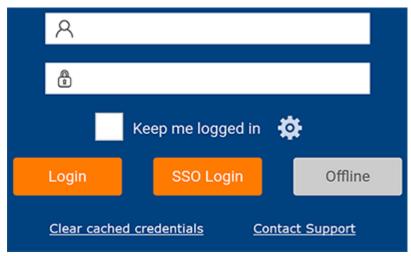
You can also select a language at the top of the setup area. The language selection affects labels and menu options but not the dashboards themselves.

English	
Enter Location	
www.mycompany.com/SDM	
Please enter the address (URL) of your Sali www.company.com/SDM	ent Dashboard application. For example
Bottling	ζ5 -
Apply	Offline

Credentials:

You can then enter your user name and password. Options may include:

- Login Enter credentials directly into login screen (i.e., classic login). •
- **SSO login** Tap on SSO Login and log in using credentials from another system (if configured).
- Pre-populated login settings (if configured; iOS only).



Tips:

- You can click the gear button in the login screen to go back to dataset setup at any time.
- The Contact Support link allows you to email log files to Salient support to assist with troubleshooting.

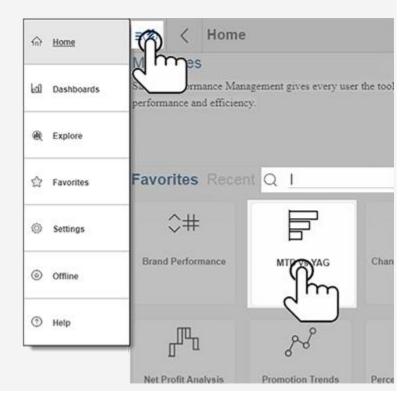
Salient Mobile screens

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 available dashboards using the "Dashboards" option on the menu.
- Type part of a dashboard name to search.



View a Dashboard

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

Navigate in a dashboard

A dashboard can include multiple views of data or "widgets." You can pan or tap to navigate between them.

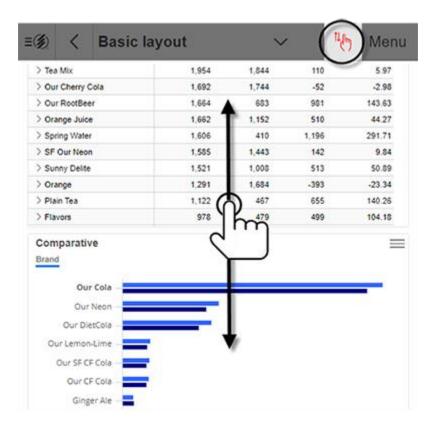
If the dashboard is longer than the screen:

Swipe to pan up or down in the dashboard. The available methods depend on the panning mode (see below). Tap the panning icon at the top of the screen to switch between modes.

(red icon) Dashboard panning ON

Swipe anywhere on the screen to pan the dashboard. (Scrolling within a widget is disabled.)

Tip: Dashboard panning mode is only available if widgets extend to the right side of the screen.



(gray or no icon) Dashboard panning OFF

Swipe in the blank area between or beside widgets to pan the dashboard up or down. (Scrolling within a widget is enabled.)

👂 🤇 Basic la	ayout	\sim	(ⁿ b)	Menu
Our RootBeer	1,664	683	981	143.6
Orange Juice	1,662	1,152	510	44.3
Spring Water	1,606	410	1,196	291.7
SF Our Neon	1,585	1,443	142	9.6
Sunny Delite	1,521	1,008	513	50.8
Orange	1,291	1,684	-393	-23.5
Plain Tea	1,122	467	655	140.2
Flavors	978	479	499	104.1
Our Cola				- ,
Our DietCola				
Our Lemon-Lime				
Our SF CF Cola				
_				
Our SF CF Cola				
Our SF CF Cola				

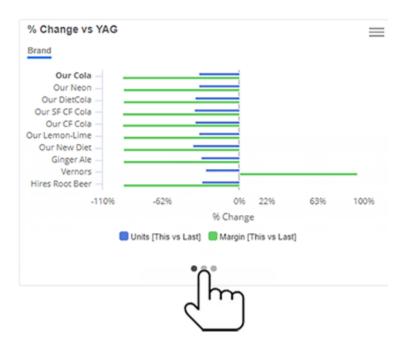
If the dashboard has multiple "tabs":

Tap to switch between tabs of data.

MTD vs YAG Percent pe Graph Actual Value Graph								
Comparative Brand	<u> </u>	Units		=				
Brand	This 4	Diff	% Change	This				
Our Cola	116,095	-55,201	-32.23	514,685				
Our Neon	39,995	-19,007	-32.21	205,501				
Our DietCola	35,916	-19,676	-35.39	169,375				
Our SF CF Cola	11,578	-6,424	-35.68	42,548				
Our CF Cola	11,465	-6,347	-35.63	44,946				
Our Lemon-Lime	9,519	-4,515	-32.17	48,633				
Our New Diet	6,681	-3,945	-37.13	25,995				
Ginger Ale	3,754	-1,636	-30.35	19,860				
Vernors	3,090	-1,118	-26.57	-542				

If the dashboard shows data in panes:

Swipe or tap the dots at the bottom of the pane to switch between widgets.



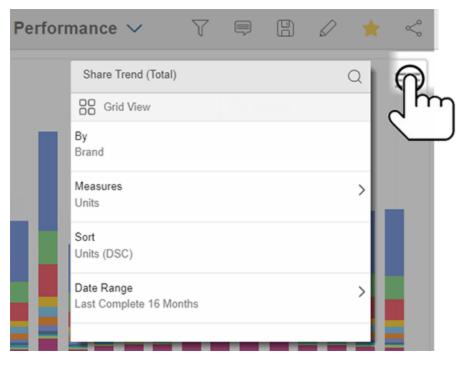
To scroll data in a widget (e.g. a grid with many rows):

Swipe within the widget itself. Dashboard panning mode must be off.

> Our RootBeer	1,664	683	981	143.6
> Orange Juice	1,662	1,152	510	44.2
> Spring Water	1,606	410	1,196	291.7
> SF Our Neon	1,585	++++	42	9.8
> Sunny Delite	1,521	1,008 h	J 513	50.8
> Orange	1,291	1,684	-393	-23.5
> Plain Tea	1,122	467	655	140.2
> Flavors	978	479	499	104.1

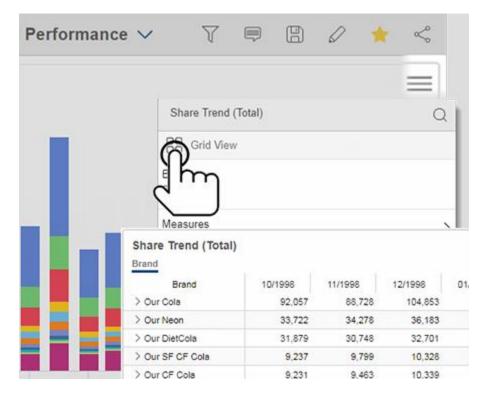
See widget information

Tap the icon in the upper-right corner of a widget to view information about it, 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. Toggle between these options in the widget menu. Specific graph types, such as line, bar, pie, etc., are pre-built into the dashboard. If the widget uses custom programming (i.e., custom view), this option is not available.



View details for any item

Tap on a row in a grid or component in a graph (bar, line, etc.) to view details such as name, internal ID, and data values.

l	97k			-
tities	73k	Customer.Channel:	Regional Chains	1
Quantities	49k	Units (Last):	115,504	
	24k			

Search

You can search in widgets that compare groupings of data (e.g., a long list). Go to the widget menu and tap the Q icon; then enter search criteria and tap the Q icon again. In the results, you can do the following:

- TAP on a single item to select it. The widget will immediately scroll to the selected item.
- TAP and HOLD or tap the $\frac{11}{7}$ icon to "pin" one or more items (see the following topic).

Irand	Compara	tive	Q
Brand Our Cola	Grap	h View 🕀 Exp	lore
Our Neon	Brand		
Our DietCola	Dianu		
Our SF CF Cola	Measures	Search: neon	XQ
Our CF Cola	Units	Available	Pinned (0)
Our Lemon-Lime		Available	Philled (0)
Our New Diet	Sort	Our Neon	
Ginger Ale	Units (This	Our Neor	Ť
		SF O Neon	

Tip: If the search icon is not shown, make sure no items are currently selected in the widget.

Pin items

You can "pin" important item(s) to the top or left side of the widget.

Brand		
	Un	its
Brand	This 🕹	Last
> Our Cola	109,239	102,733
> Our DietCola	37,405	32,169
> Our Lemon-Lime	11,886	10,398
Total (3)	158,530	145,300
> Our Neon	40,60	5 35,186
> Our SF CF Cola	11,35	2 10,243
> Our CF Cola	11,27	1 10,215

To pin

Go to the widget menu and tap the Q icon. TAP and HOLD an item or tap the P icon; then, tap on any additional items you wish to pin. When you are finished selecting items, tap on **Pin** at the bottom of the panel.

Comparative				=
Brand	Comparativ	/e	Q	
Brand > Our Cola	oll Graph	Search Brand	Q =	
> Our Neon > Our DietCola	By Brand	Available	Pinned (3)	
> Our SF CF Cola	Measures Units	Our Cola	Р	
> Our Lemon-Lime > Our New Diet	Sort	Our Neon	Р	
> Ginger Ale	Units (This	Our DietCola		
		Our SF CF Cola	_ ال	Ŋ
		Our CF Cola	Р	_
	-	Our Lemon-Lime	P	
	-	Cancel	Pin	

Measure selection

Show/hide measures

Pick the measures to show. The list includes measures that are preconfigured into the widget. Additional measures can be accessed in <u>explore mode</u> (see page 46).

≡Ø)	<	Bran	d Perf	orma	nce 🗸	\mathbb{Y}		\bigcirc	*	Ś
Share	e Trend	(Total)			d (Total)			Q		ନ
	430k		By	Grid Vi	ew				(
	320k		Bran							
Units	210k	I.	Units	$\mathbf{\hat{f}}$	٦			>		
	110k		Units		J	+				
			12/199 Last		Measures					2000
		Diet 📕 Gi	eon 📕	Margi	in					
				Units						
					Cancel		A	pply		

Expand a calculated measure

In a grid, you can expand a calculated measure to see its components.

Tap the heading of the calculated measure. In the pop-up menu, turn on **Expanded** and then **Apply**.

	Net	venue
This	Last	hom -
58,621	940	224
30,622	425,5	898
23,544	327,899	-304,355
13,512	203,602	-190,090
12,526	173,318	-160,792
11,297	271,099	-259,803
12,881	215,556	-202,675
9,575	124,518	-114,943
8,106	145,454	-137,348

	Net Revenue	
	Expanded	
3	This	-
5	Last	-
5	Mix (This)	
3	Average (This)	
	Cancel	Apply

Mix, % change, and other computations

A grid can include difference, % change, mix, and other computations.

To show computations

- 1. In a grid, tap the measure heading.
- 2. In the pop-up menu, toggle the switches to show the desired computations; then tap on Apply.

	Unit	s		Net Re	venue	Net Revenue	
This 🕹	Last	Diff	% Change	This		Net Nevenue	
162,567	189,249	-26,682	-14.10	117,436	I I	Average (This)	
58,824	68,743	-9,919	-14.43	60,6			
44,130	52,073	-7,943	-15.25	43,750	5	Delta (This vs. Last)	_
44,002	47,854	-3,852	-8.05	29,523	3		
29,947	57,434	-27,487	-47.86	21,544	4		
29,516	39,697	-10,181	-25.65	23,789	3	Diff	
29,207	32,088	-2,881	-8.98	20,702	2		
20,565	22,632	-2,067	-9.13	16,766	1	% Change	
						Mix (Last)	
						Cancel	Apply

- This values for the this date range
- Last values for the last date range
- Average average per unit of time (per day, week, month, or period) in the date range. When comparing two date ranges, mix is available for This and/or Last.
- Mix percent of the total. When comparing two date ranges, mix is available for This and/or Last.

- Delta (This vs. Last) variance between date ranges (This vs. Last). This switch inserts difference and percent change. Optionally, turn off an underlying switch to show just one of these computations.
- Delta (Last vs. This) variance between date ranges (Last vs. This)

Equivalents

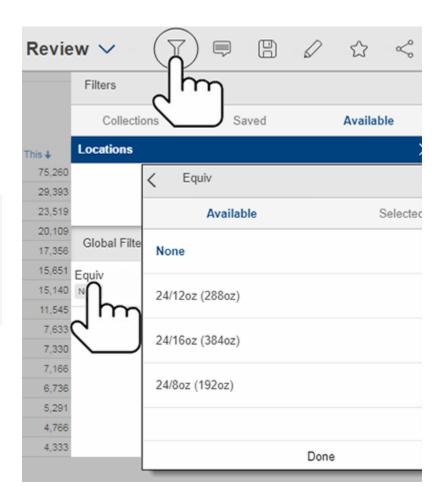
Equivalents are a way to standardize data so that all units are worth the same amount. For example, you might express volume in terms of ounces or another standard measurement.

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

Tips:

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

• <u>Explore mode</u> (see page 37) provides another way to apply equivalents.



Select dates

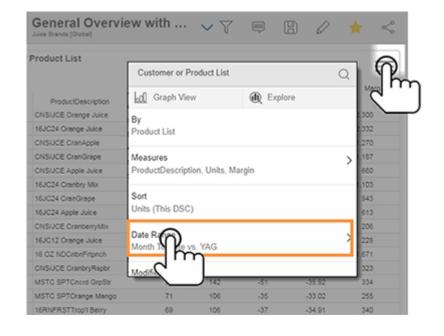
Dashboards show data for a range of dates (days, weeks, months, etc.) that can update automatically over time. Some widgets may also show an earlier date range to compare against. You may be able to change the dates depending on how the dashboard is configured. Date ranges are normally linked across a dashboard so that changing a date range in one widget affects other widgets.

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 select from the following options.

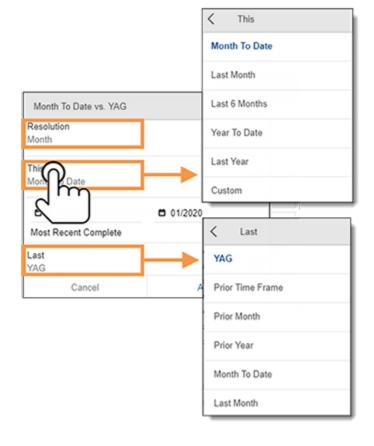


Quick-pick date options

In the next pop-up, choose a resolution (day, week, month, etc.).

Then, tap on **This** date range to choose from a variety of pre-configured options (month-to-date, last month, year-to-date, and so on) for the selected resolution.

Repeat for Last date range if available.



Custom start & end dates

To choose a custom start or end date, tap on it and choose from date options.

	Month To Date vs. YAG		
	Resolution Month	>	
	This Month To Date	>	
	01 01	/2020	
	Last YAG	> 🛍	
Cancel			Done
	November		2016
	December		2017
			2018

Date comparisons

You can add or remove a date range to compare against (depends on the widget type).

Compare two date ranges

To add a comparison date range, tap on **Add Date Range**. Then choose date options for Last date range.

This Month To Date		>		
D 01/2020	01/2020			
Most Recent Complete				
	Last Prior Time Frame		>	Ŵ

Single date range

To look at a single date range, tap the i icon to remove the comparison date range.

This Month To Date			>
0 01/2020	01/2020		
Most Recent Complete			
Last Prior Time Frame		>	

Comparisons of incomplete timeframes

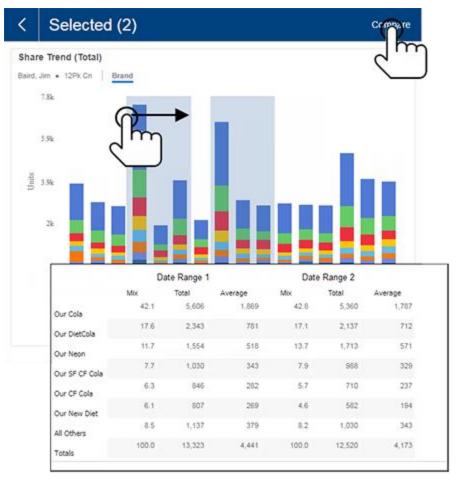
For a timeframe that isn't complete (e.g., current month), choose what to compare against.

- Matching time frames Compare to a matching number of days during Last date range for a precise view of gain/loss (i.e. how much better/worse are we doing).
- Complete last period Compare to a full timeframe (full week, month, etc.) for a gap or goal perspective (i.e. how much more to go).

D 01/2020	D 01	/2020				
Most Recent Complete						
Last Prior Time Frame			>	Ŵ		
1 2/2019	D 12	/2019				
Comparison Matching time frames	┝	<	Com	parison		
		Mat	ching t	ime fram	ies	
		Con	nplete la	ast period	ł	

Date range selection in graphs

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



Additional methods of date selection

The following date selection tools may be built into the dashboard:

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.

≡⊛ <	Volume Review	• (T) = B	0 \$ <
Comparative	Filters	راس	
Channel 0%	Collections	Saved	Available
	Locations		>
-13%		No locations selected	
% Change	Global Filter	Monthly End Date	
-38%	Monthly End Date	Available	Selected (1)
-52%	Most F Here(1/31/2000)	Most Recent(1/31/2020)	
	None	01/2020	
	jional ·	12/2019	
		11/2019	
		10/2019	
	Cancel	09/2019	
			Done

Date buttons

A dashboard may include pre-configured buttons to change the date with a single tap.



Group By

In widgets that compare members, data is grouped together by attributes (i.e. Group By) to allow comparison and investigation of those groupings. Multiple levels of groupings may be available.

1st By	2nd By	3rd By		
			Units	;
Channel 🕈	KeyAccount	Brand	This	Last
> 3rd Party Operators			15,140	28,040
All Othr On Premise			983	1,484
> Bars / Taverns			1,525	1,972
✓ Beverage Centers			7,330	9,190
Beverage Centers	> All Others		4,295	5,420
Beverage Centers	✓ Hanrahan		2,397	2,646
Beverage Centers	Hanrahan	> Amazn Cherry	1	2
Beverage Centers	Hanrahan	> Cherry Lemon	0	2
Beverage Centers	Hanrahan	> Dry Grape	2	2

Top-level groupings (1st By)

Select how to group the data at the highest level (1st By). The resulting groupings can be compared, ranked, and expanded. Tap the menu at the top of a comparative widget; then tap on an attribute. The list of available attributes is built into the dashboard. Additional ways of grouping data are available in <u>explore mode</u> (see page **Error! Bookmark not defined.**).

Comparative				
		Unit .ast	s Diff	%
		115,504	-40,244	
Cnumel	L.	38,590	-9,197	
		30,926	-7,407	
ZipCode		28,922	-8,813	
		22,752	-5,396	
Region [Customer]	2	38,702	-23,051	
		28,040	-12,900	
:: SalaaDan		14,146	-2,601	
SalesRep		14,054	-6,421	
		9,190	-1,860	
AssignedRoute		10,486	-3,320	

Group By order (2nd By, 3rd By, etc.)

The Group By order controls what attribute is next when expanding a member or drilling down.

To change the order, tap the breadcrumb path to open the Group By menu; grab an

attribute's handle and drag it to a new location in the list; then **Apply**.

Channel		
Group By	Ur	nits
Group By	.ast	Dif
	115,504	-0,244
Channel	38,590	-9,197
	30,926	.7,407
- 🕌 KeyAccount	28,922	-8,813
	22,752	-5,396
Package	38,702	-\3,051
	28,040	- 2,900
	14,146	-2,601
	14,054	6,421
el Apply	9,190	-1,860
, pp.y	10,486	-3,320

Grid expansion

View multiple levels of data at once in grids. For example, expand the top-level dimension (1st By) into subgroupings for the next dimension (2nd By).

Expand rows individually

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

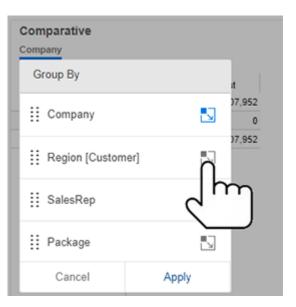
Tip: This method of expanding data is limited in a "flat view"; instead, you can turn on auto-expand (see below).

Brand	Region	[Customer]	SalesRep	This	Last
> Our Cola				115,805	171,29
> Our Neon				39,723	59,00
Our DietCola				35,809	55,5
m	✓ SouthEa	st Area		9,558	15,4
	SouthEast An	ea > Sa	n, Tom	2,419	3,37
	SouthEast An	ea ≻Vie	sky, George	1,883	2,9
Our DietCola	SouthEast An	•• > ~	i i i	1,713	3,05
Our DietCola	SouthEast An	ea >		1,555	3,01
Our DietCola	SouthEast An		olish John	1.093	1,96
Our DietCola	SouthEast An	Details			ه 🛡
Our DietCola	SouthEast An	K Uplevel	Downlevel	Expand	27
Our DietCola	SouthEast An	· Opievei		Expand	
Our DietCola	SouthEast An	Product.Brand:	Our DietC	ola	-
		Internal ID:	13		
Our DietCola	> SouthWe	Region [Customer]:	SouthEas	t Area	65
Our DietCola	> East Area	region [oustomer].	00001203		62

Expand all rows (auto-expand) in a grid

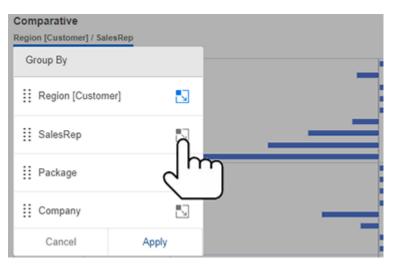
Tap the menu at the top the widget; then tap on to automatically expand <u>all</u> members of a dimension(s) to the next level. The icon is blue when auto-expand is on.

Tip: The grid may organize the subgroupings under the parent level (with subtotals) or treat them independently (no subtotals), depending on the grid type. The grid type is built into the dashboard, but can be changed in <u>explore</u> mode (see page 37).



Graph expansion

In comparative, multi comparative, and mix graphs, you can expand dimensions to see data broken down further by the next dimension. To expand data in graphs, tap the menu at the top the widget; then tap on to turn on auto-expand.



Tip: The graph may organize the subgroupings according to the parent level (e.g., grouped bar chart or "sunburst" chart) or sort subgroupings independently (i.e. flat data), depending on the underlying grid type. The grid type is built into the dashboard, but can be changed in <u>explore mode</u> (see page 37).

Cross By

Crosstab analyses show crosssections of data for two attributes (Group By & Cross By). To select the Cross By, tap the menu at the top of a Crosstab widget; then drag the attribute's handle into the Cross By box. To choose the Group By, tap on the attribute.

SalesRep	
Group By	
Cross By AssignedRoute	
Product List	
City	
()Brand	
	Apply

Sort

To rank results by name or measure, tap the column header in a grid. (This may open a menu with an option to sort.) Tap again to reverse the sort.

	Units		Margi	n
Channel	Thich	Last	This	Last
Regional Chains	1 m	115,504	282,234	426,029
Conv With Gas	a''	38,590	176,649	232,179
Other Groceries	1	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

Pass/fail lists

In an Exception grid or graph, you can list out passing, failing or total members (e.g., customers who did or did not buy). Just tap on the row and then tap on the members to list.

		Passed	% Passed				
Channel	Totals	Details	T		a		
Industrial	578	Details		5			
Schools	459		Expan	d			
Fast Ford	395						
Restaul	411	Customer.Channel:	Fast Food				
Others I	283	Internal ID:	56	. 2	29 Failed (This) - Fast Fo	bod	
Conv	197	(Totals):	395		nits >= 1]	JUU	
Bars / Taverns	212		400			Units	
All Othr On Premise	1,122	Passed (This):	166	Customer	CustName		Last
Hosp'ls/Nursing Hmes	126	Passed (Last):	171	03386	DENNIS HOMEMADE ICE CREAM	0	0
Recreation	444	% Passed (This):	42.0	04976	THE GREAT ESCAPE	0	0
Clubs	115	9/ Deceed (Leat):	43.3	06189	IRON KETTLE FARM	0	0
Government Accounts	144	% Passed (Last):	43.3	06890	LA BELLA PIZZA	0	0
		Failed (This):	ത	07150	LOWMAN FLEA MARKET-CONCESSION	0	0
		Failed (Last):	lfm	03508	DOG HOUSE	0	0
			-0	00610	BAGELS NORTHEAST INC	0	0
			\sim	00611	THE BAGEL EXPRESS	0	0

Record details

If a widget is grouped by "Record Details" (may require additional configuration), it shows granular, record-level information (e.g., invoices, work orders, inventory records, etc.). In addition, you may be able to drill down to record details.

Comparat SouthEast Ar	t ive rea > Serv-Rite	Record Details			Gross
				Units	Revenue
Date 🕈	Invoice	CustName	ProductDescription	This	This
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	20OZ NR Our Cola	98	138
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	20OZ ND Spring Water	98	112
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	20OZ NR Our DietCola	56	79
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	200Z NR Lmn-Lime	28	39
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	20OZ ND Our Punch	28	39
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	200Z ND Sunny Delite	42	59
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	200Z NR Tea Mix	42	59
1/8/2020	00581039	FINE HOST / DROP SHIPMENT	Cans Our Cola	396	407
1/8/2020	00581039	FINE HOST / DROP SHIPMENT	Cans Our Neon	396	407
1/8/2020	00581039	FINE HOST / DROP SHIPMENT	Cans Our DietCola	0	204
1/12/2020	00593784	FINE HOST / DROP SHIPMENT	20OZ NR Our SFCFCola	4	6

Tips:

• Switch to a grid if you see a message that "none of the selected measures are graphable" when attempting to view record details.

• You cannot drill or expand beyond record details.

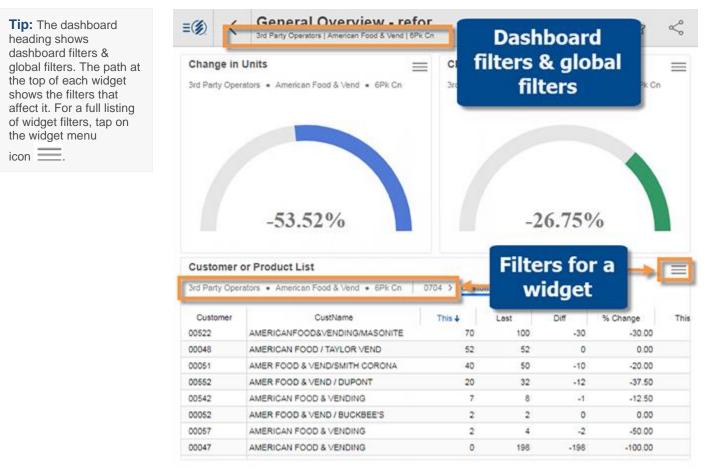
• Record details are limited to one million records. If records exceed this limit, reduce the amount of data using filters or by changing the date range.

Filter

Filters allow you to narrow down on the exact information needed.

- Global filters stay on as you use different dashboards.
- Dashboard filters affect widgets throughout a dashboard.
- Individual widget filters affect a single widget.

Filters may be applied by making selections in the filters panel, drilling down, applying saved sets of members (i.e., collections), choosing locations, and more.



Dashboard filters

Dashboard filters (also known as workspace filters) can filter data across the entire dashboard. These filters provide built-in menus to let you pick the data you are interested in.

You can access this type of filter in the Filters panel. In addition to built-in dashboard filters, the filters panel shows any applicable global filters that are turned on.

To use a dashboard filter

After opening the panel, tap on any filter to edit it; then, choose one or more members to filter on them. Tap on **Done** and then **Apply**.

To show data for all members (i.e., ignore the filter), leave it set to "All" in the filter panel.

Tips: To filter out data for the selected member(s) rather than including data for those members, you can turn on the **Exclude** option at the bottom of the filter menu

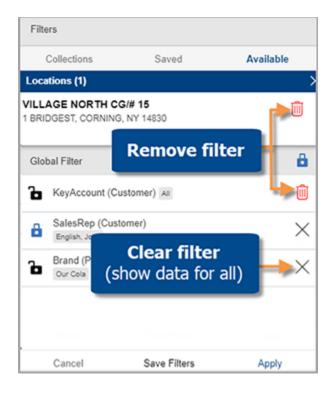
Filt	Collections	Saved Available	
Loca	ations		>
	No loca	ations selected	
Glo	bal Filter		8
Ъ	KeyAccount (Customer) Al	
8	SalesRep (Custo	ן י	×
Ъ	Package (Product) 12Pk Cn 12PkCnND	_	\times
Ъ	Brand (Product) A		
	Cancel Sa	we Filters Apply	
	KeyAccount (Cu		(
	KeyAccount (Cu-	stomer)	
	KeyAccount (Cu Available B. English-North	stomer)	
	KeyAccount (Cu Available B. English-North Lindley NE	stomer) Selected (1)	
	KeyAccount (Cu Available B. English-North Lindley NE Obeck Inc. North	stomer) Selected (1)	
	KeyAccount (Cu Available B. English-North Lindley NE Obeck Inc. North S.Newburg Dist-North	stomer) Selected (1))

To clear or remove a filter

In the Filters panel, tap the X to clear a dimension or key filter (i.e., show data for <u>all</u> members).

Tap the trash icon to completely remove a filter. Key and dimension filters must be cleared before you can remove them.

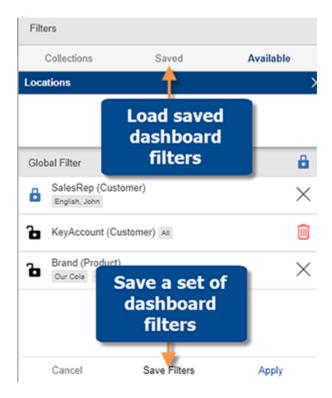
Tip: You cannot remove a filter if it has a corresponding filter widget in the original dashboard.



Saved filters

You can save and reuse sets of dashboard filters.

When you load saved filters, only applicable filters will be used (i.e. dimension is used as a group by in the dashboard).



Location filters

In addition to the filters shown here, dashboards may be filtered by one or more geographic locations (see page 56) using the Location panel.

Global filters

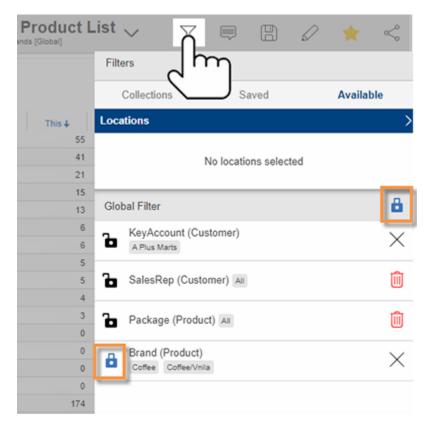
You can turn on a global filter(s) to stay focused on any subset of the data as you use different dashboards. When you open another dashboard, applicable global filter(s) (see below) will remain locked on.

The filter panel lists global filters in addition to the dashboard's filters.

To turn on a global filter

In the Filters panel, tap the **b** icon to turn on the filter globally (i.e., lock on **b**).

To lock/unlock all of the dashboard's filters at once, tap the b/b icon at the top of the list.



When you open another dashboard

A global filter will stay on if any of the following are true:

- The filter's dimension is a "group by" in the dashboard.
- The dashboard has a dashboard filter for the dimension.
- The filter is based on a collection.

The global filter must also have at least one member selected (i.e., not "All") to remain on.

Tip: You may receive a prompt to apply global filters when you open another dashboard. The prompt can be turned on or off in <u>settings (see page 61)</u>.

Clear global filters

The home screen shows the current set of global filters. You can tap the icon to clear all global filters.

≡∰	<	Home	
Glob	bal Fi	Iters 🗊	
Sales	sRep () Package (1)	Brand (1)
Gord	on, Pat	Premix	Club Soda
Favo	orite	s Recent (2
		7	

Collections

You can create and apply custom collections of members to narrow down on your preferred areas of the business. Collections can be saved for future use and/or utilized for ad-hoc filter selection. Collections can be used in other dashboards and by other users (if global).

Turn a collection on as a filter

Go to the collections area in the Filter panel. Then, locate and apply the collection. Data for all other members will be filtered out (unless the collection uses the Exclude option, in which case the collection members will be filtered out).

Product List	<	Marketing Cates	gories	Q
		Collections	Saved	Available
ProductDescription	This 4	1	Create New Collection	0.
12PK CN Our Cola	39,1			
2LTR-8 Our Cola	19,3	Coffee Brands		
Cans Our Cola	15,1			
12PK CN Our DietCola	10,8	Energy Brands		
12PK CN Our Neon	9,7	10.8531.75956.063		
200Z NR Our Cola	9.5	Isotonics		
16PNR8 Our Cola	8,1	isotorines		
Cans Our DietCola	6,7			
Cans Our Neon	6,4	Juice Bonds		
2902 NR Our Neon	6.0	Im	2	
2LTR-8 Our Neon	5.7	Nev		
12PK CN Our CF Cola	5.0	\sim)	
240Z NR Our Cola	5.0	Old Brands 201	7 and earlier	
2LTR-8 Our DietCola	5.0			
12PK CN Our SFCFCola	4.9	0.0	d David	
Premix Our Cola	3.5	Other Carbonat	eo brands	
2LTR-SPAOur Cola	3.2	Refresh	Cancel	Apply
150NDR Our Diatonia	3.0	retresh	Cancel	ADDIV

Create a collection

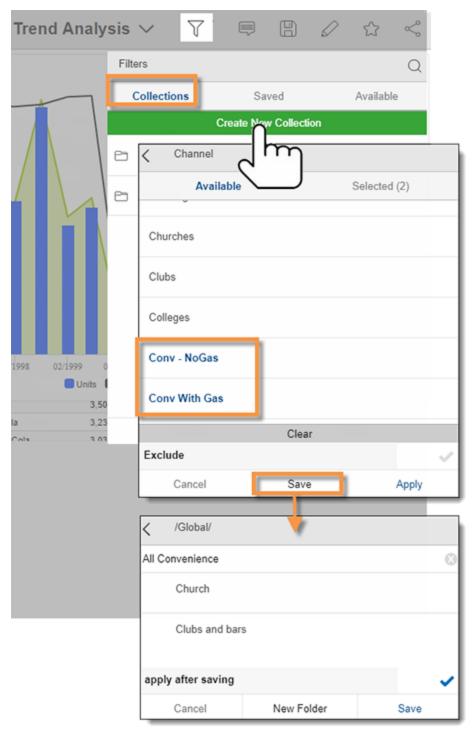
In the collections area of the Filters panel, tap on **Create New Collection**. Select the attribute and collection members, and then save the collection.

You can turn on the collection immediately (**apply after saving**) and/or use the collection in future sessions.

Tips:

• Available attributes are limited to the By dimensions that are prebuilt into the dashboard.

• Available folders (private or global/shared) depend on user account settings.



Ad-hoc filter selection using collections:

You can filter on members without saving them as a collection. After selecting members, tap on **Apply** at the bottom of the panel.

Conv - NoGas		
Conv With Gas		
	Clear	
Exclude		
Cancel	Save	Apply

Drill down (downlevel)

Drill on a single item

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

Comparative				
Channel				
		U	nits	
Channel	This 🕹	Last	Diff	% Change
> Regional Chains	75,260	115,504	-40,244	-34.84
> Conv With Gas	29,393	38,590	-9,197	-23.83
> Other Groceries	23,519	30,926	-7,407	-23.95
> Mass Merchandisers	20,109	28,922	-8,813	-30.47
> Local Chang	17,356	22,752	-5,396	-23.72
> Drug Stores				
> 3rd Party	Details			
> Superettes		I	Exp	and
> Industrial			ER LYD	anu
> Beverage Centers	Customer	nh	Local Chain	S
	Interna		05	
	Units (This):		17,356	
	Units (Last):		22,752	
	Units (Diff):		-5,396	

Drill on multiple

Drill down on multiple items to narrow

2) Choose the Drill option at the top

1) Touch and hold to select.

down on them:

of the screen.

Compara	ative			(2)
Comparative			ill into cted	L m
Channel	This 🕹			ange
Regional Chains	75,260	115,504	-40,244	-34.84
Conv With Gas	29,393	38,590	-9,197	-23.83
Other Groceries	23,519	30,926	-7,407	-23.95
Mass Karct Liters	20,109	28,922	-8,813	-30.47
Local ins			6	-23.72
	1. Touc	:h & ho	old	-59.56 -46.01 -18.39
Druge 3rd	1. Touc	14,054	-6,421	-46.01
Dry Superettes			1	-46.01 -18.39
Dry 3rd Superettes	7,633	14,054	-6,421	-46.01 -18.39 -45.69
Dry 3rd Superettes Industrial Beverage Centers	7,633 7,330	14,054 9,190	- 6,421 -1,860	-46.01 -18.39 -45.69 -20.24
Drugs 3rd Lange Superettes Industrial Beverage Centers Fast Food	7,633 7,330 7,166	14,054 9,190 10,486	-6,421 -1,860 -3,320	-46.01 -18.39 -45.69 -20.24 -31.66

Tip: Drilling is not available in widgets that use custom programming (i.e., custom views).

Widget filters

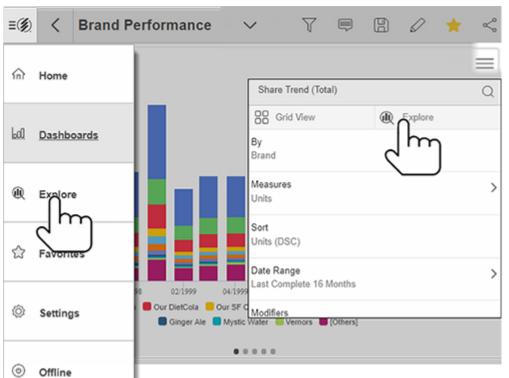
A widget may have embedded filters that only affect that widget. To change a widget filter (e.g., select a different member), tap in the breadcrumb path at the top of the widget. (You cannot change collections applied to a single widget.) To view a complete list widget filters, tap

the widget menu icon **E**.

Comparative		
Our Cran Company One	Channel Units	
Edit	iis 🕹	Last
Rem	33,212	50,114
	13,839	18,156
Clear Filters	10,439	13,530
	8,791	12,674
	8,774	11,222
> Drug Stores	6,829	17,410
> 3rd Party Operators	6,318	10,704

Explore

Explore mode provides additional tools for data investigation beyond what was built into the dashboard. You can change the analysis type, group by any attribute in the dataset, add measures beyond those that were built into the dashboard, and more.



To start exploring

Option 1: Default starting point

Open the main menu and pick Explore. This will take you to a comparative widget.

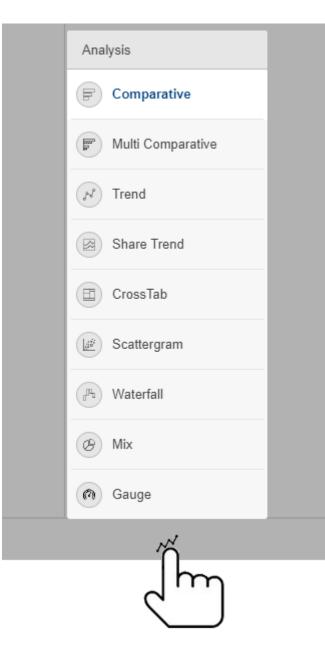
Option 2: Start with any widget

Tap the icon in the upper-right corner and then select **Explore**.

Explore mode includes the following tools at the bottom of the screen:



Change the analysis type



In explore mode, tap the \swarrow button at the bottom of the screen and select an analysis type. See the following descriptions.

Tips:

• These analysis types are available in both grid and graph formats, which you can toggle in the widget menu.

Share Trend (Total)	Q
Grid View	

• To use a Geo or Exception (i.e. pass/fail) widget in explore mode, you must start with that widget type.

• In a widget that uses custom programming (i.e., custom view), changing the analysis type may have unintended results.

Comparative

Comparison of members for one or two date ranges

Units		Ma	rgin	
Region	This	% Change	This 🕹	% Change
> Near West Area	1,117	-9.04	248	-92.31
> SouthEast Area	1,433	81.16	208	-93.27
> NorthWest Area	454	23.37	111	-93.58
> SouthWest Area	359	20.47	94	-93.04
> East Area	265	4.33	64	-93.59
> NorthEast Area	4	33.33	0	101.05
Total (6)	3,632	23.45	725	-93.00

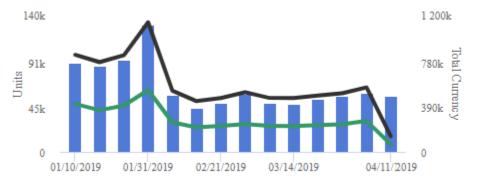
Multi Comparative

Comparison of members for any number of date ranges

Month To Date vs. YAG -						
Drops Year To Date vs. YAG - Drops						
Channel 🕈	This	Last	This	Last		
3rd Party Operators	104	121	104	121		
All Othr On Premise	112	134	112	134		
Bars / Taverns	245	272	245	272		
Beverage Centers	108	126	108	126		
Churches	12	14	12	14		
Clubs	114	128	114	128		
Colleges	67	80	67	80		

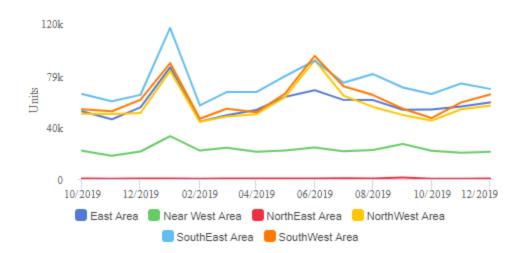
Trend

Trend over time for one or two date ranges



Share Trend

Comparison trend for multiple members



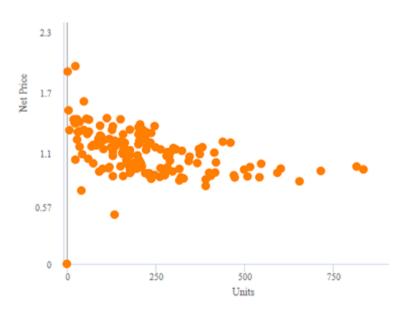
CrossTab

Comparison grid or graph by two attributes

Channel	Our Cola	Our Neon	Our DietCola	Our SF CF Cola
> Regional Chains	33,212	9,619	10,464	4,730
> Conv With Gas	13,839	6,913	2,912	470
> Other Groceries	10,439	4,422	2,368	494
> Mass Merchandisers	8,791	2,750	2,836	1,380
> Local Chains	8,774	1,847	2,357	1,051
> Drug Stores	6,829	2,097	2,456	1,179

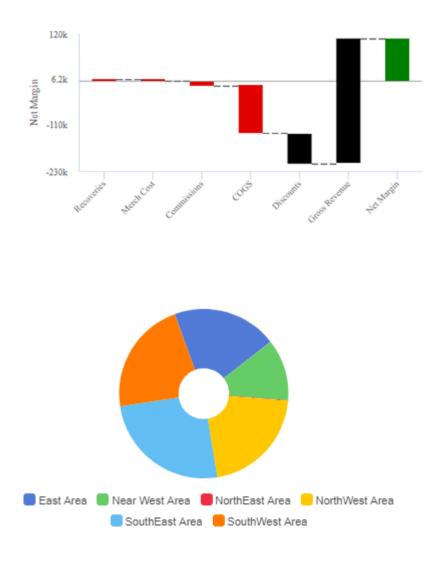
Scattergram

Plot of members (e.g., customers) for two measures to show trends and outliers



Waterfall

How the components of a calculated measure affect its make-up



Mix

Gauge

A simple visual tool showing performance for a single measure

Percent of the total for multiple members



Group By any attribute

In explore mode, you can group the data by any attribute in the dataset. This feature is available in widgets that compare members.

Tap the button at the bottom of the screen in explore mode. From here, you can:

- Tap on an attribute to group data (i.e., set as 1st By).
- Drag and drop to reorder attributes. (Tip: Grab the handle.)
- Tap on to auto-expand a dimension to the next level.
- Add another attribute (see below).

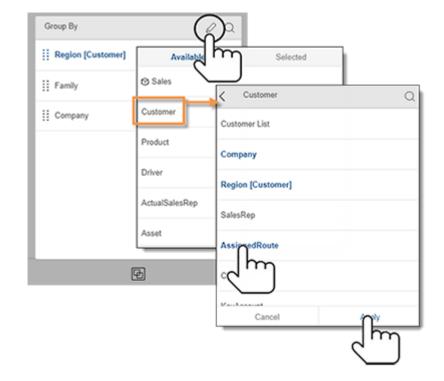
Grou	ир Ву	0 Q
∏ R	egion [Customer]	5
II F	amily	5
∷ ⊂	ompany	5
.1		
N	Î	
	4.1	

Add an attribute

Option 1: Select from a list

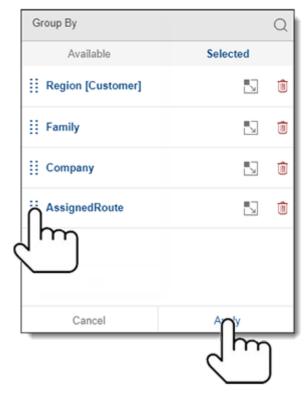
- 1. In the Group By area, tap 4.
- 2. Select the key (what the attribute describes).
- Tap on the attribute(s) to select it. The attribute(s) should now be blue.
- 4. Tap on Apply.

Tip: The Group By area shows keys and attributes for the selected data cube (i.e., type of activity). You may need to change the cube (see page 44) to access other keys and attributes.



This goes back to a list of selected attributes. Notice that the new attribute is added as the last By.

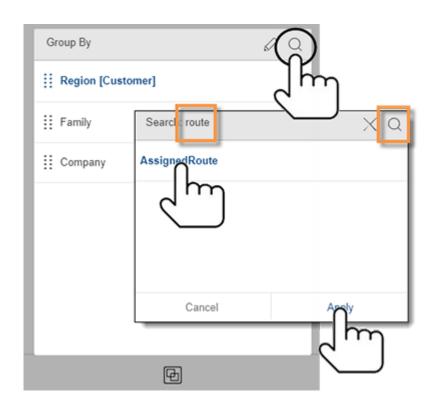
5. To group data at the highest level (i.e. 1st By), tap on the attribute or drag it to the top of the list; then **Apply**.



Option 2: Search for an attribute

- 1. In the Group By area, tap \square
- 2. Enter part or all of the name and tap again to perform the search.
- 3. Tap on the attribute(s) to select it. The attribute should now be **blue**.
- 4. Tap on Apply.

This will take you to the list of selected attributes where you can make the new attribute the 1st By.



Change the data cube

Data cubes are subsets of the data that define activities or conditions. You may need to change the data cube to access an attribute or measure associated with a different activity.

- 1. In the Group By area, tap \checkmark .
- Under Available, tap the name of the currently-selected data cube (indicated by ⁽²⁾).
- 3. Select the new cube.
- 4. You can now choose a Group By from the new cube.

Tip: This may change the measures that are available.

	Group By	Cube Selection
	Availa	
		Sales
	Customer	Depr
	Product	
	Driver	
	ActualSalesRep	CMA
	Asset	ActiveCust
	Canc	AR
r	~	P (31)

Date setup in explore mode

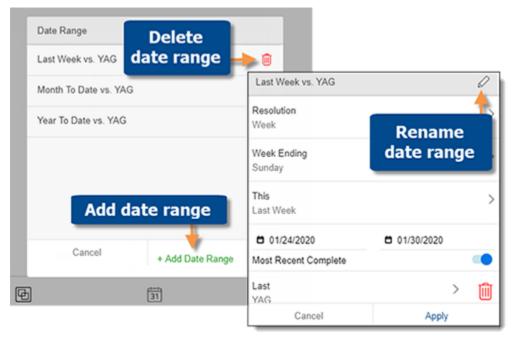
Tap the $\boxed{31}$ button at the bottom of explore mode to access date setup options.

In general, these are the same as <u>date options</u> (see page **Error! Bookmark not defined.**) in the widget menu.

Month To Date vs. YAG	
Resolution Month	>
This Month To Date	>
0 01/2000	0 01/2000
Most Recent Complete	
Last YAG	> 🛍
D 01/1999	C 01/1999
Cancel	Apply
Ð	
2	lm

Date setup for Multi Comparative widgets

For Multi Comparative widgets, explore mode provides additional capabilities. You can add a date range, delete a date range, or rename a date range.



Add measures

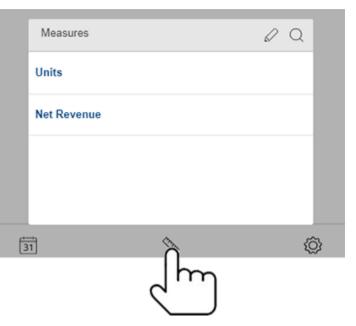
In explore mode, you can add any measure from the dataset.

Tap the button at the bottom of the screen in explore mode.

The window lists measures that are already added. To show/hide any measure, tap on it.

- Show = **bold blue text**
- Hide = regular text

To add any other measure, select it from a list of available measures or perform a search (see below).



Option 1: Select from list

- 1. In the Measures area, tap \checkmark .
- 2. Select the data category (quantities, income, costs, etc.).
- 3. Tap on the measure(s); then **Apply**. You can add multiple measures.

This takes you to a list of the selected measures. You can then apply your changes.

Measures		
Units	Measures	
Net Revenue	Available	Selected
	Quantities	< Margin O
	Income	Margin
	Cost	۲
	Margin	Margin w/ AdCost
	Duration	Margin\$ Per Cap
	Frequency	Margin/HeadCt
	Cancel	Net Margin
		Cancel Apply

Option 2: Search

- 1. In the Measures area, tap Q
- 2. Enter part or all of the name and tap Q again to perform the search.

margin	× გ
Units	را اس
Net Revenue	$ \rightarrow $

- 3. Tap on the measure; then **Apply**.
- 4. This takes you to a list of the selected measures. You can then apply your changes.

Tip: If you don't see the desired measure, it may not be available for the given context. For example:

• The available measures are limited to data cube(s) associated with the current Group By; therefore, you may need to change the <u>data cube</u> (see page **Error! Bookmark not defined.**) and 1st By (in the Group By area) to access a measure for a different activity or data source.

• Some analysis types limit the available measures. For example, the mix widget is limited to additive data.

To delete a measure

Tap on 🖉 in the Measures area and go to the Selected list. You can then delete any measure from the widget.

Measures	Q
Available	Selected
Units	١
Net Revenue	Û

Settings in explore mode

Explore mode allows you to change the following settings to enhance your data investigation. Tap 🔅 at the bottom of explore mode, make your selections; and tap **Apply**.

	Settings		
	Equivalent None		>
	Grid Type Standard		>
	Graph View Graph Percent Char	ige	>
	Cancel	Apply	
31	>	ñ	
		qm	

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.

(The dataset must include equivalent tables to use this option.)

Grid types

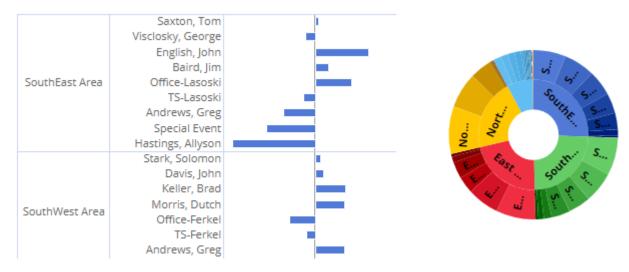
The grid type affects the layout of columns and rows. In addition, some graphs are affected by the grid type when auto-expand is on. The grid type can be changed in the settings area of explore mode. The available types depend on the analysis (e.g., comparative, mix, etc.).

Standard grid type

In general, a standard grid shows measures in columns and members in rows. If rows are expanded, the grid will place the subgroupings under the parent categories and include subtotal rows for the expanded items.

Region	SalesRep	This 🕹	Last
> SouthEast Area		73,794	116,284
SouthEast Area	> Saxton, Tom	18,637	26,408
SouthEast Area	> Visclosky, George	18,032	27,000
SouthEast Area	> Baird, Jim	10,536	19,010
SouthEast Area	> Office-Lasoski	10,044	19,006
SouthEast Area	> English, John	9,929	16,328

In graphs with an underlying "standard" grid type, expanding dimensions will organize subgroupings according to the parent category. In a mix graph, the result is a "sunburst" chart that shows a ring for each dimension. (Note: The number of slices in a sunburst is controlled by the graph page size selected in Salient Dashboards edit mode; if this number is too low, the graph will omit some pie slices.)

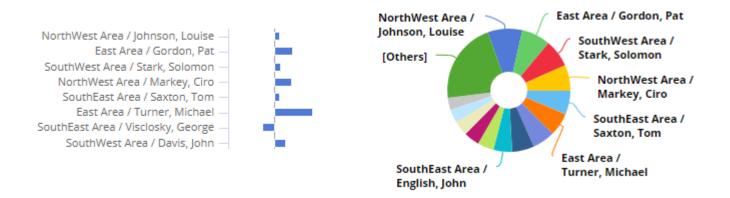


Flat view grid type

The flat view is like the standard grid except it sorts combinations of "auto-expanded" dimensions independently of the parent level and omits subtotal rows for auto-expansions.

Region	SalesRep	This 🕹	Last
NorthWest Area	> Johnson, Louise	25,336	35,918
East Area	> Gordon, Pat	23,883	32,158
SouthWest Area	> Stark, Solomon	23,364	33,378
NorthWest Area	> Markey, Ciro	19,150	28,190
SouthEast Area	> Saxton, Tom	18,637	26,408
SouthEast Area	> Visclosky, George	18,032	27,000

In graphs with an underlying "flat" grid type, expanding dimensions will display combinations of members at a single level so they can be sorted independently.



Swapped grid type

In a swapped grid, columns and rows are switched.

Reg	jion	SouthEast Area	SouthWest Area	NorthWest Area
Units	This↓	73,794	60,364	57,685
Units	Last	116,284	89,170	83,206
	This	32,384	26,234	24,646
Margin	Last	497,780	391,334	363,452

Scorecard grid type

The scorecard grid shows measures in rows and computations (This, Last, difference, etc.) in columns.

	This	Last	Diff	% Change
Units	273,537	407,952	-134,415	-32.95
Margin	117,885	1,751,830	-1,633,945	-93.27

Scorecard swapped

The swapped scorecard shows computations in rows and measures in columns.

	Units	Margin
This↓	273,537	117,885
Last	407,952	1,751,830
Diff	-134,415	-1,633,945
% Change	-32.95	-93.27

Tip: In a widget that uses custom programming (i.e., custom view), changing the grid type may have unintended results.

Graph view

For some analysis types, you can graph actual values or the percent change. This setting does not affect widgets that use custom programming (i.e., custom views).

Save and Share

Save

You can save your changes to a dashboard. For example, make common selections and then save changes in a new dashboard to return to it later.

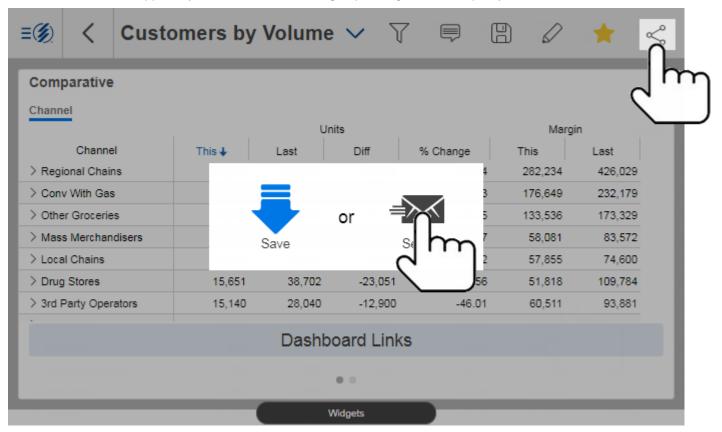
Tap and then choose a dashboard name and location. Create your own folder if you wish. The available categories (private or global/shared) depend on your account settings.

	`	× 7	Y	<u>}</u>	0 🔺	Ś		
	< Week	/Published/Glo dy Channel Per Offline	2	ľm	Online	٢	Tips: • To create a new folder on New Folder at the bo	
	F	Customer List	- MTD vs YAG w	/ith filters	ŝ		of the panel.On the home screen, to and hold to delete or ren	
	F	Customer List	- MTD vs YAG v	ith filters	\$2		a dashboard or dashboard folder.	rd
	Ð	Customer Per	formance Map				E Delete	R
	F	Customers by	Volume					
	F	Discharges						
	Ħ	exception					MTD Brand Low Performance	Volume Lo
	(6)	Financial Ove	rview		-			
		Cancel	New Fold	er	Save			

Share

You can share a specific dashboard with other users via email, text, etc. 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.



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.

			Knowled Member Info
	This 4	Lust.	Description
	75,260	115,504	
	29.393	38,590	Comparison of customer
	23.519	30.625	performance for MTD versus last year (matching number of days)
613	20.109	28,922	- Sort grid to see biggest differences vs. YAG
	17,356	22,752	Pie chart offers a quick visual of most significant oustomer
	15,651	38,702	Resources(3)
10	15,140	22.040	Resources(s)
	11,545	14,148	C formal
	7,633	14,054	0
8	7,330	9,190	Arportog directions
	7.165	10.486	-
	6,736	9,524	8 122 HOOT - BT CATURES
	5,291	7,354	
ines	4,766	6.212	Comments (0)
	4.333	5.594	
	3,613	0	No commente avalladas
	2,927	4,534	
	2.525	3,436	
	1,545	2,122	

Member Info

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

Cust	tomers by	Vol	
	This 4	U Lest 115:504	Dash Member Into
	29,393		
	23,519	30,826	Back General Add
eers	20,109	28,922	
	17.355	22,752	JCUMMINGS
	15,651	38,702	Significant volume decline since 2015. Investigate new brand
ons	15,140	25,040	opportunities March 07, 2019 at 2:36 PM
	11,545	14,146	JCUMMINGS
	7,633	14.054	Customer performance survey March 07, 2019 at 2:38 PM
	7,330	9,190	meters, astronautor m
	7,165	10,455	
	6,738	9.524	Cancel
	2.00A	2.601	559.969

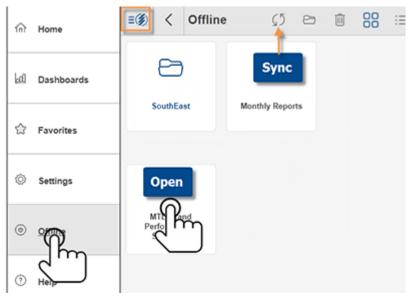
Offline mode

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

First, save the dashboard to an offline folder. You may need to create a folder before you can select it.

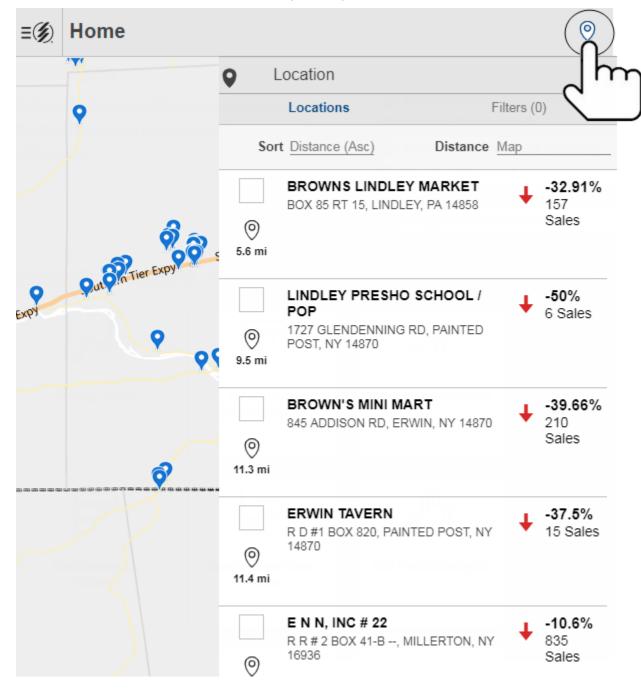
E K SouthEast Area	erfor ∨ 🍸 📮 🤇	
% Change vs YAG	/offline/	հո
SouthEast Area Brand	MTD Brand Performance	
Our Cola —	Offline	Online
Our Neon	SouthEast	
Our DietCola —	С МТО	
Our SF CF Cola		
Our CF Cola —		
Our Lemon-Lime	Cancel	New Fulder
Our New Diet -		
	Cancel	Save

Then, go to offline mode to access the dashboard when you aren't connected. When you are back online, sync with the latest data.



Locations

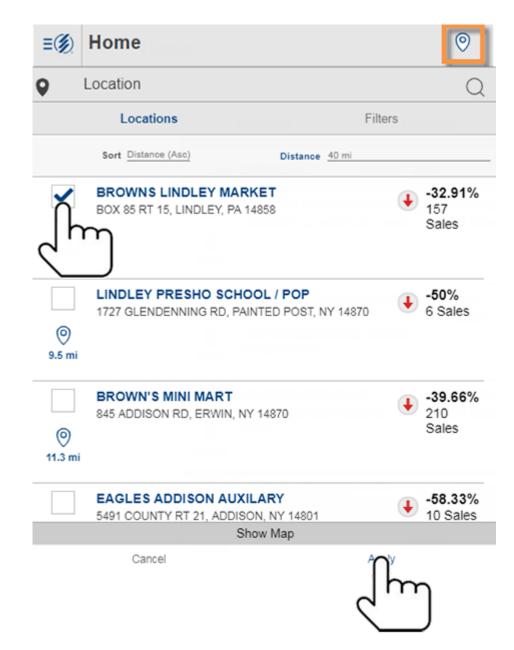
List locations that are nearby or within any map extent. Sort or filter the list by distance. Select any location to turn it on as a filter. Location services and additional setup are required.



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."



The filter will appear in the upper-right corner of the home screen. To turn location filters off, tap the trash icon.

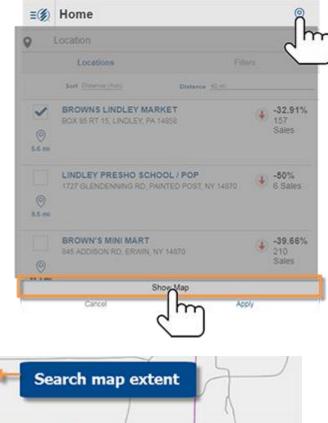


Location map

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

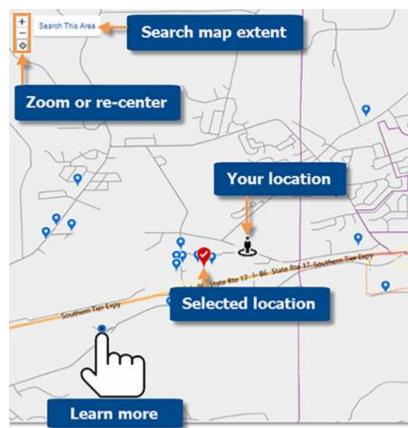
To open a map

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; rerun the search within any map extent.



Notifications

Your organization can set up custom notifications to alert you when something needs attention.

Requirements for mobile notifications

- Salient mobile app with notifications allowed
- Notification rules and frequency defined in the Salient Dashboards browser-based application (V7.60 or higher required)
- Additional installation and configuration for the Salient Dashboards web application

Get notifications

If configured and allowed, Salient notifications will automatically appear on your device like other notifications; you can then tap to view and investigate the underlying data in the Salient Mobile app. Depending on the notification setup, the resulting widget may show all items that meet test criteria, only new items, or all data (if nothing meets criteria and setup allows this type of notification).



Manage notifications

To access previous notifications, go to Notifications in the main menu. You can then search notifications, tap to open any notification, or touch and hold to select a notification.

fnì Home	All Unread	2
📶 Dashboards	Search X Q =	-
(Explore	Mon Sep 28 2020 Notification: Brand An Tap to There are 26 B The open r attention	
☆ Favorites	Notification: Region_Ibis that need your attention Notification: Region_MOs5 Touch &	
Q Notifications	There are 3 Regionant in the select	
After selecting a notification(s), you can	= (2) < 1 (2) ∠ (2) All Unread (1)	
 Mark it as unread/read. Output of the image of the i	Search Q Mon Sep 28 2020	
• Unsubscribe from it. (This cannot be undone.)	Notification: Brand Analysis 8:55 AM There are 26 Brand_IbIs that need your attention	
	Notification: Region MTD 8:50 AM There are 3 Region_IbIs that need your attention	
	Notification: Region MTD 8:50 AM There are 3 Region_IbI's that need your attention	

Tip: Notification rules and frequency are defined in the Salient Dashboards browser-based application.

Advanced

Settings

The settings screen (accessed through the main menu) provides customization options. You can also log out or contact support from this area.

ள் Home	≡⊛ < Settings
	Log Out
<u>ଯ</u> ି Dashboards	Open dashboards in single layout mode Single layout
	Edit Password mode
😭 Favorites	Old Password
	New Password Change
Settings	Retype Password password
0	Save
Offline	
() Help	Currency Table None Change currency
	Global Filter OFF ON
	Global Filter Prompt OFF Global filter settings
	Contact Support Email Salient support

Setting	Explanation
Single layout mode	This option is only used if the dashboard has a layout that has been created in the mobile app and the browser-based layouts (desktop/tablet and phone) are turned off for mobile. In this case, you can turn on the checkmark to open a dashboard to a single, maximized pane rather than using 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.
Currency table	Select the currency. Options must be configured by your administrator.
Location	Enable/disable the nearby location feature (additional setup).
Global filter settings	Turn on/off global filtering. Turning global filters off will clear all global filters. Turn off the prompt to automatically apply current global filters when you open a dashboard. Or turn the prompt on to receive a prompt before applying global filters.
Contact Support	Email log files to Salient support for troubleshooting. When prompted, you must allow Salient to access photos and media to enable this feature.
	To email via Microsoft Outlook instead of the device's default email app, the Microsoft Office Outlook Desktop Integration app must be installed.
	On Windows, the support email address may not populate automatically; in this case, enter support@salient.com.

Edit layouts in the Salient mobile app (optional)

If your organization has installed Salient Dashboards Version 7.80 or higher, <u>the following procedure may not be</u> <u>necessary</u> because Dashboard Designers can create mobile layouts in the dashboards browser application.

If you have not upgraded to Salient Dashboards Version 7.80, your organization cannot create mobile layouts in the dashboards browser application; instead, users can create layouts within the mobile app itself as explained below.

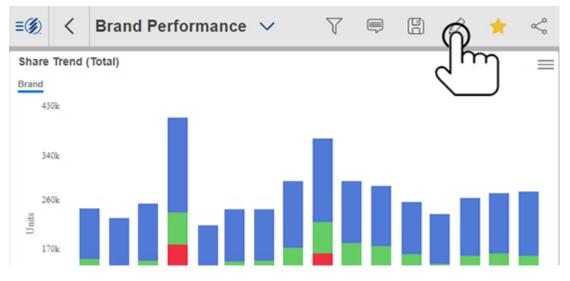
If a dashboard does not have either type of layout (designed in browser application or mobile app), the mobile app will display a single pane with additional widgets available via swipe.

To create a layout within the Salient mobile app

This procedure requires the same rights as saving dashboards within a given category (e.g., private or published/global) as explained in the *Salient Dashboards Installation and Configuration Manual*.

In version 7.80 and higher, the edit feature is not available in the mobile app if the dashboard already has a layout defined in Salient Dashboards edit mode (i.e., "Show This View in App" setting is on.)

1. Open the dashboard and tap the edit button.



2. Tap on Change Layout to open the wizard.

■ Brand Performance	Preview Change ayout Save Cancel
Enter Dashboard Title	

Share Trend (Total)



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, users will be able to scroll to the next widget.

≡Ø)	Brand	Perfo	mance					ок	Cancel
Dast	hboard Wi	dgets						Î	
E	Share 1	Trend (Total)			(ୖ) Ga	uge			
((d))Gauge				() G Mb	c			
ŀ	Scatter	gram							
1) 5	Select Lay	out						t	_
	✓							E	
	1	2x1	i. Pick	a layoı	ıt.	3x1 tall	4x1 tall	2x1	wide
1	2x2	3x2	3x2a	3x2b	3x3				
2) \$	Select Bac	kground C	olor					t	
			ii. Cho	ose bac	kgrour	nd color	•		
_							iii. Clic	k O	OK.

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.

≡∰	Brand Perform	ance	Preview Ch	ange Layout	Save Cancel
Ente	r Dashboard Title				
	Tap to 5	idaet Widget \$	Selector	o Select Wi	idaet
		٢	hare Trend (Tot auge	al)	

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 <u>apply a filter</u> (see page 67) or <u>select a specific location</u> (see page 68) in the location panel.

To determine the URL of a mobile dashboard link

Option 1

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



Option 2

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

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

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

		View URL		or	Sh	are	
	🏈 SALIENT 🌟 🤅	Chain Account Performance	~	🖉 Edit	70	Ś	÷
		it ites ihed	Q				
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Replace with salient://		Cost Customers Cost Placements New Customers New Product Placements	\$ }?	Open Move Rename Delete			
Databboard URL http://i11.111.111.11i/sdm/s Demo_Bottling&view=viewe		ooard=Customer+Ranking	E≊ ≙ ☆	Add Folder Set as Home Set as Favori URL			

Parameters

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

Parameter	Explanation
ds	This is the name of the dataset. If omitted, the link will attempt to open the most recent dataset accessed by the user.
view	The "view" parameter is ignored by the mobile app.

Parameter	Explanation
categoryld	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 <u>"Filters in mobile dashboard links"</u> (see page 67).
locationSelectionHostCode & locationSelectionName	Refer to <u>"Locations in mobile dashboard links</u> " (see page 68).

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.

Examples

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

The resulting dashboard would be filtered by customer 11901.

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

The resulting dashboard would be filtered by customer region 01.

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

&filterValues=11901,11227,11391

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

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

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

Locations in mobile dashboard links

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

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

To select a location via a dashboard URL

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

&locationSelectionHostCode=member code

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

&locationSelectionName=display_name

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

Examples

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

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

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

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

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

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