



SALIENT®

Salient Mobile

User Guide

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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

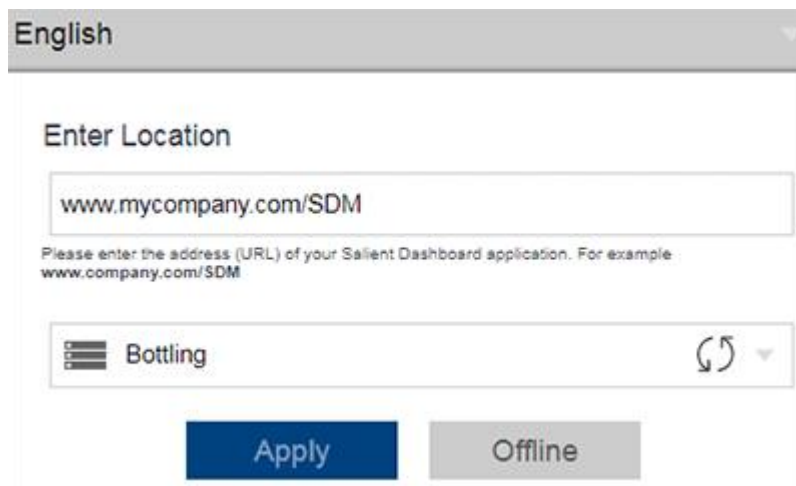
- The mobile app requires Version 6.20 or higher of Salient Dashboards. To take advantage of recent enhancements, we recommend using the latest version of Salient Dashboards.
- The mobile app can be run on any of the following mobile operating systems: Android™ v 5+ ; Apple (iOS9+); Windows 8.1+. Custom 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.

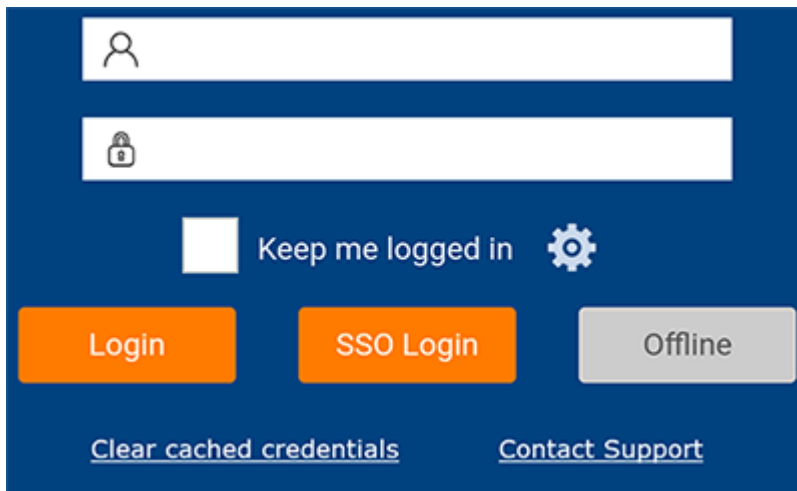



Credentials:

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).

The image shows a login screen with a dark blue background. At the top, there are two white input fields. The first field has a person icon on the left, and the second field has a lock icon on the left. Below these fields is a checkbox labeled "Keep me logged in" followed by a gear icon. At the bottom, there are three buttons: "Login" (orange), "SSO Login" (orange), and "Offline" (gray). Below the buttons are two links: "Clear cached credentials" and "Contact Support", both underlined.**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.

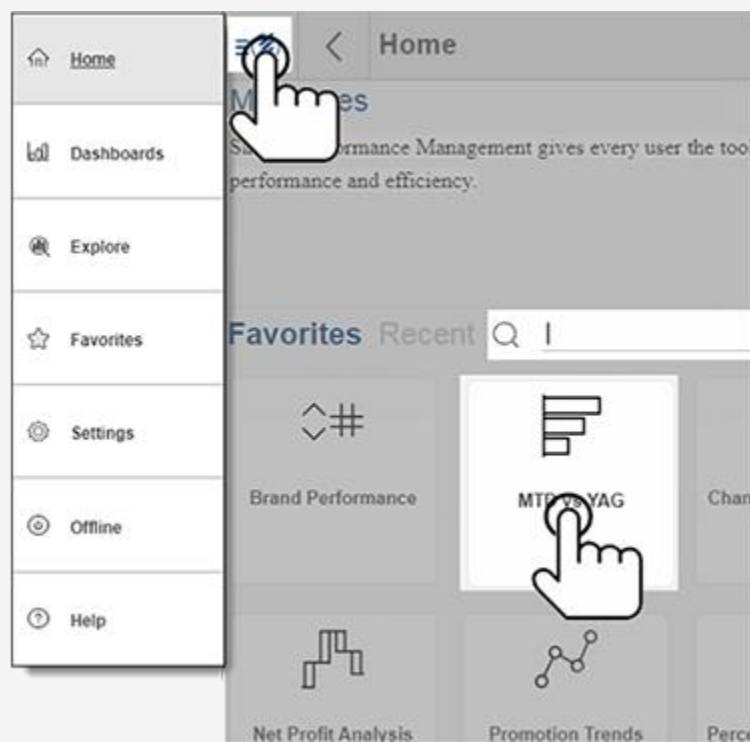
Salient Mobile screens

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.

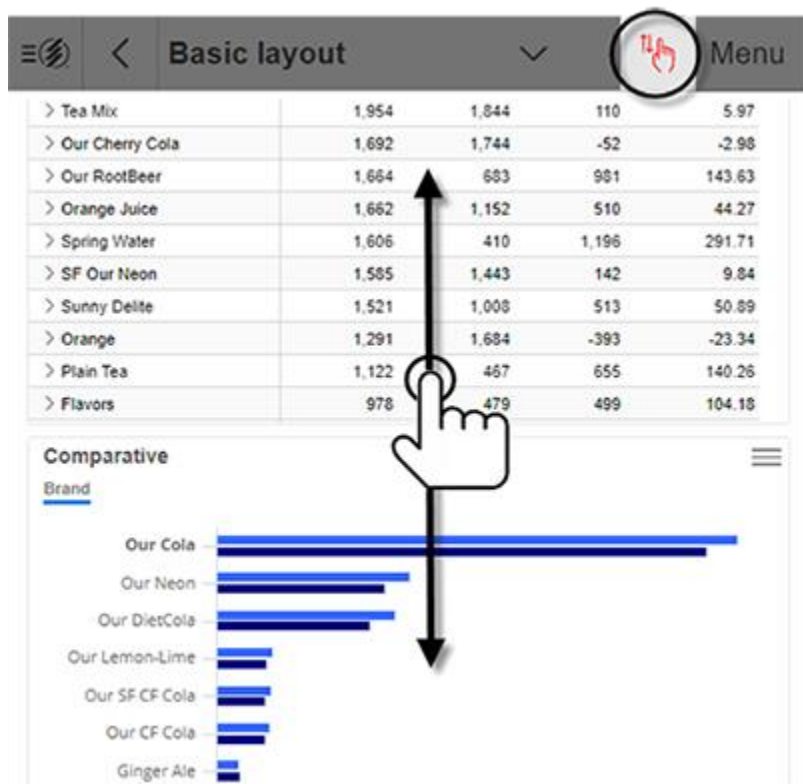



(red icon)

Dashboard panning ON

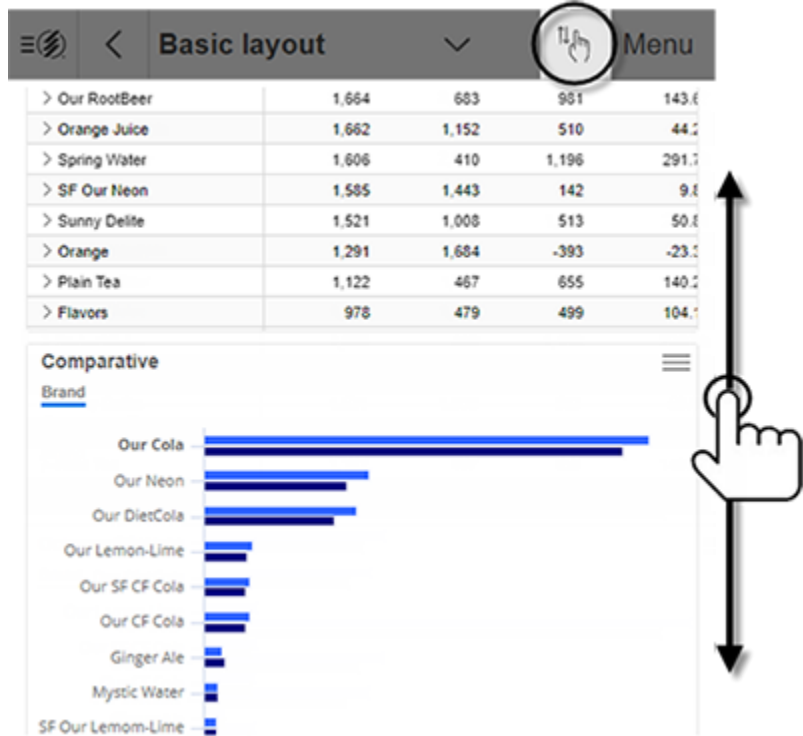
Swipe anywhere on the screen to pan the dashboard. (Scrolling within a widget is disabled.)

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



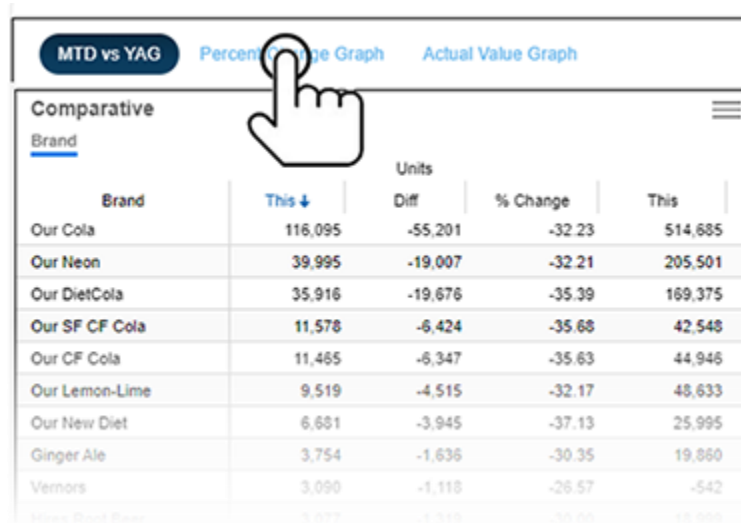
 (gray or no icon)
Dashboard panning OFF

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



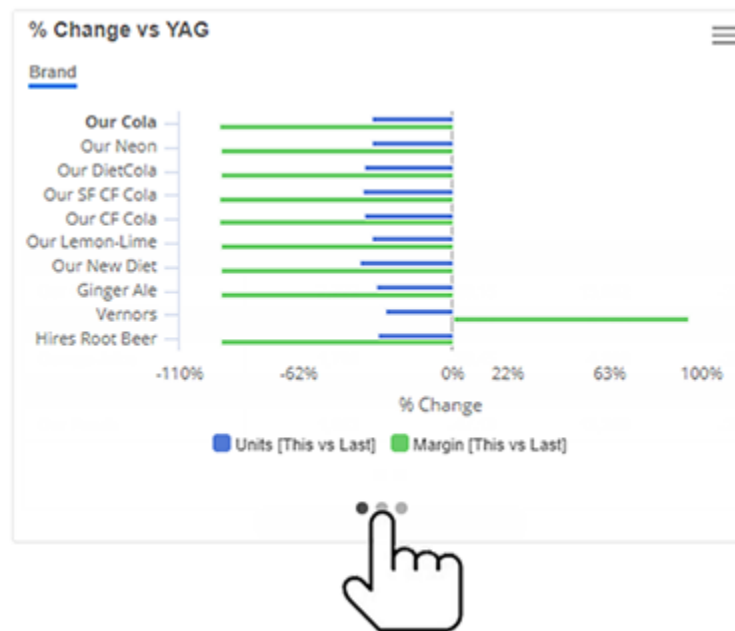
If the dashboard has multiple "tabs":

Tap to switch between tabs of data.



If the dashboard shows data in panes:

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




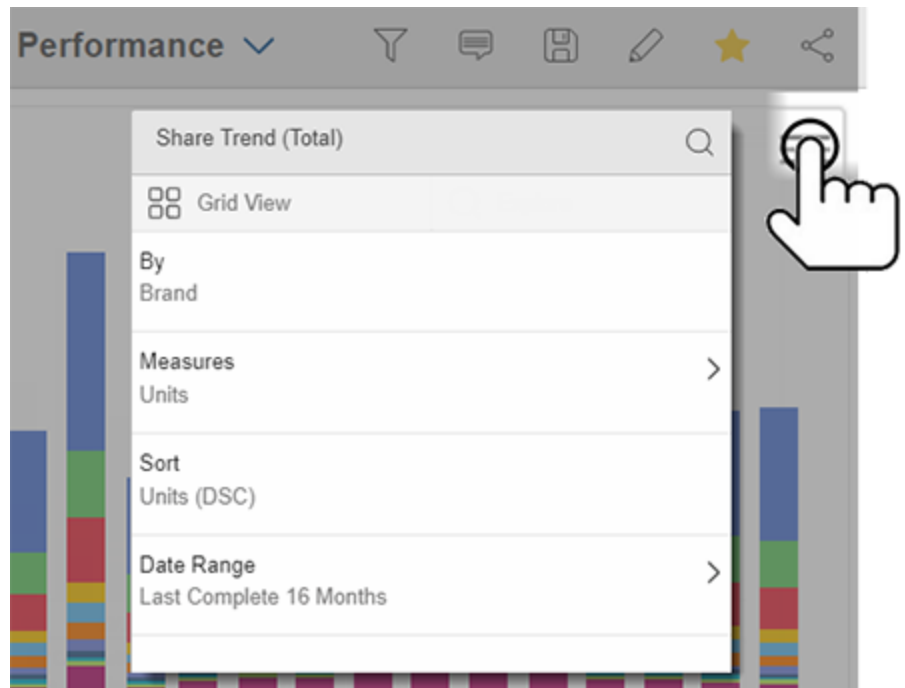
To scroll data in a widget (e.g. a grid with many rows):

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	1,143	442	9.8
> Sunny Delite	1,521	1,008	513	50.8
> Orange	1,291	1,684	-393	-23.3
> Plain Tea	1,122	467	655	140.2
> Flavors	978	479	499	104.1

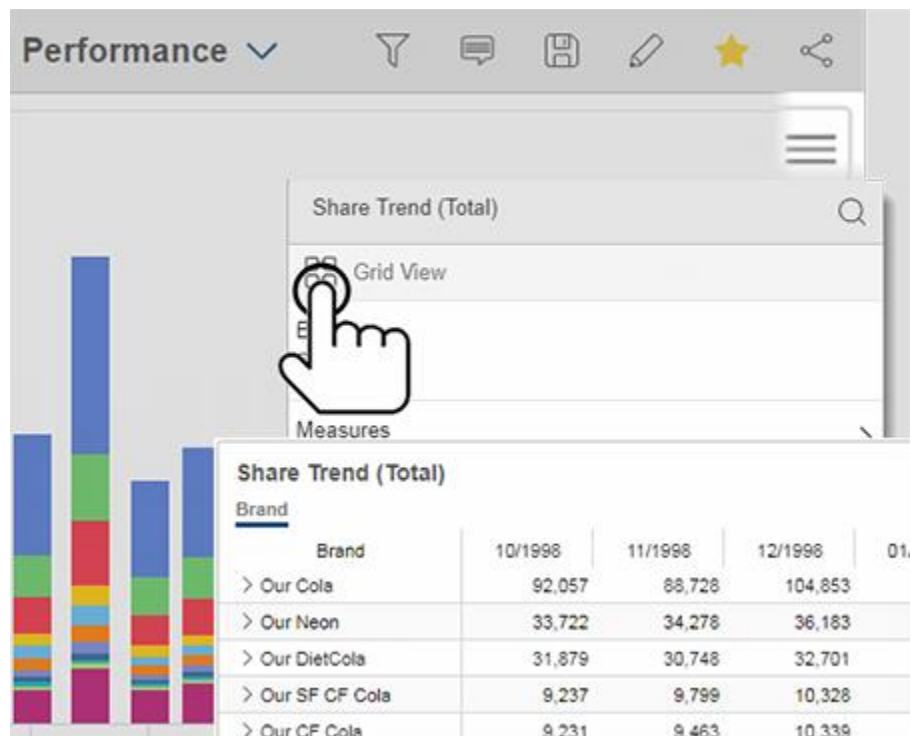
See widget information

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.



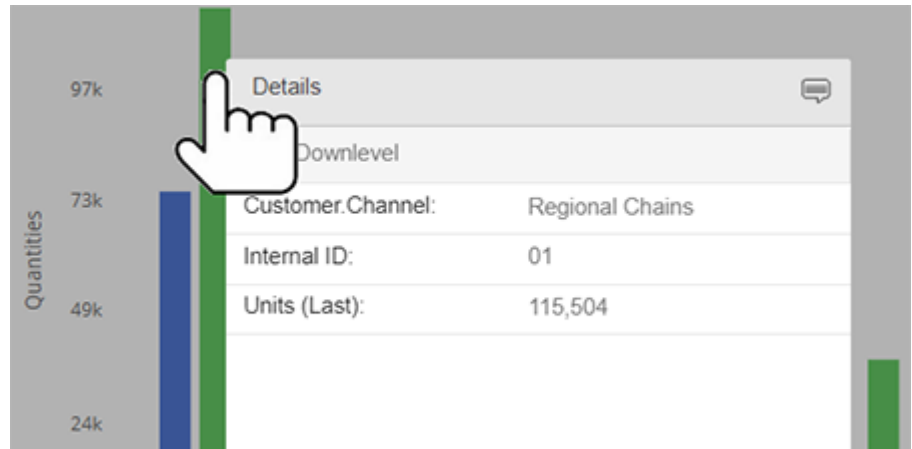
Pick a graph or grid

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

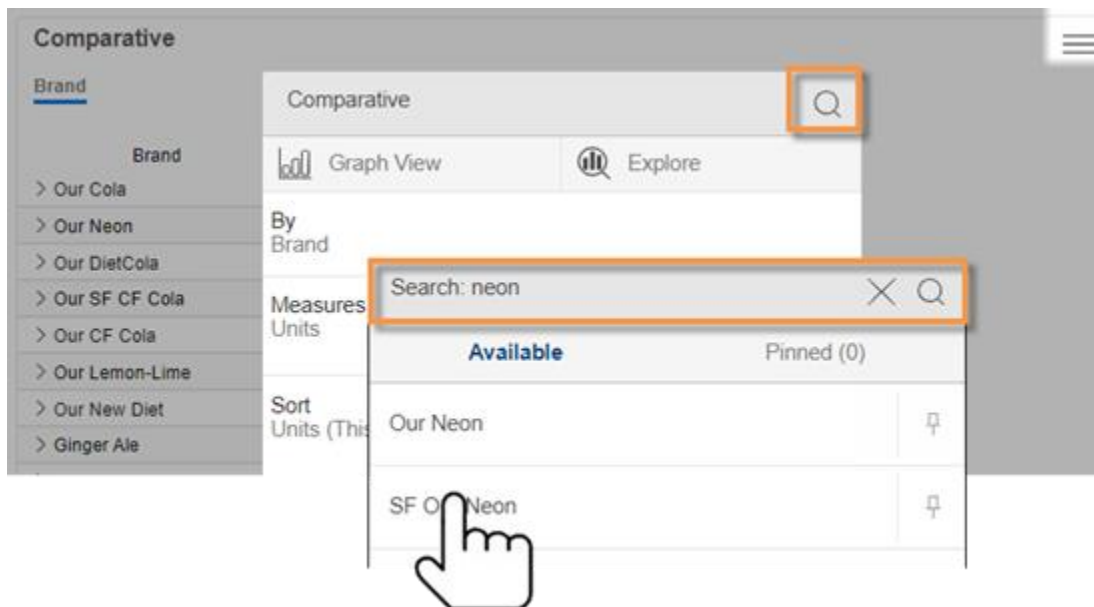
Tap on a row in a grid or component in a graph (bar, line, etc.) to view details such as name, internal ID, and data values.



Search

You can search in widgets that compare groupings of data (e.g., a long list). Go to the widget menu and tap the  icon; then enter search criteria and tap the  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  icon to "pin" one or more items (see the following topic).





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

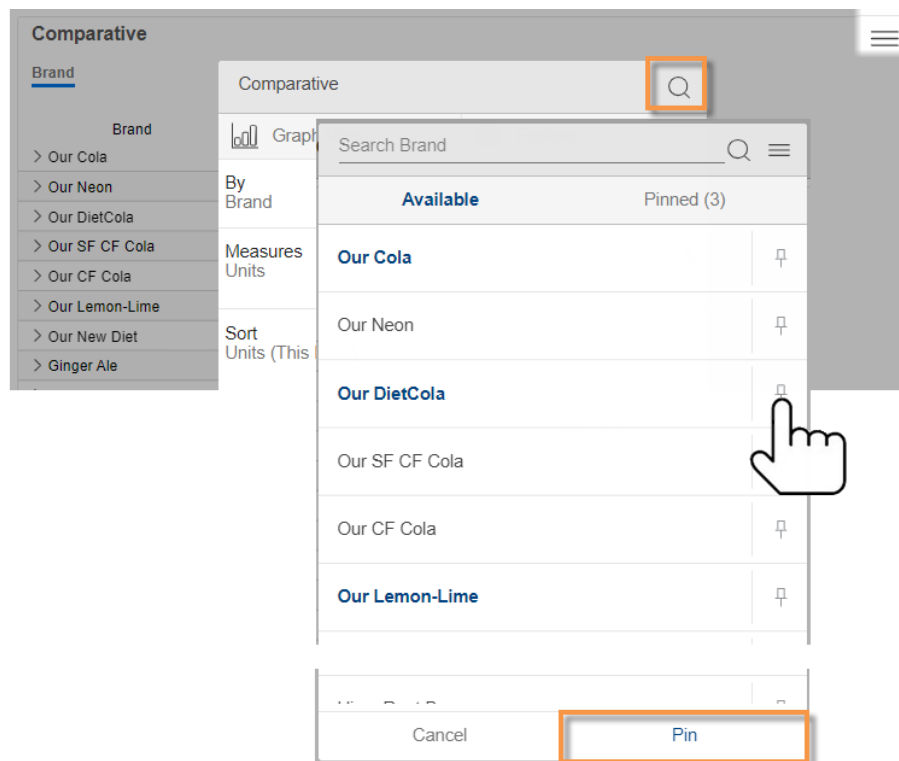
Pin items

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

Brand	Units	
	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	40,605	35,186
> Our SF CF Cola	11,352	10,243
> Our CF Cola	11,271	10,215

To pin

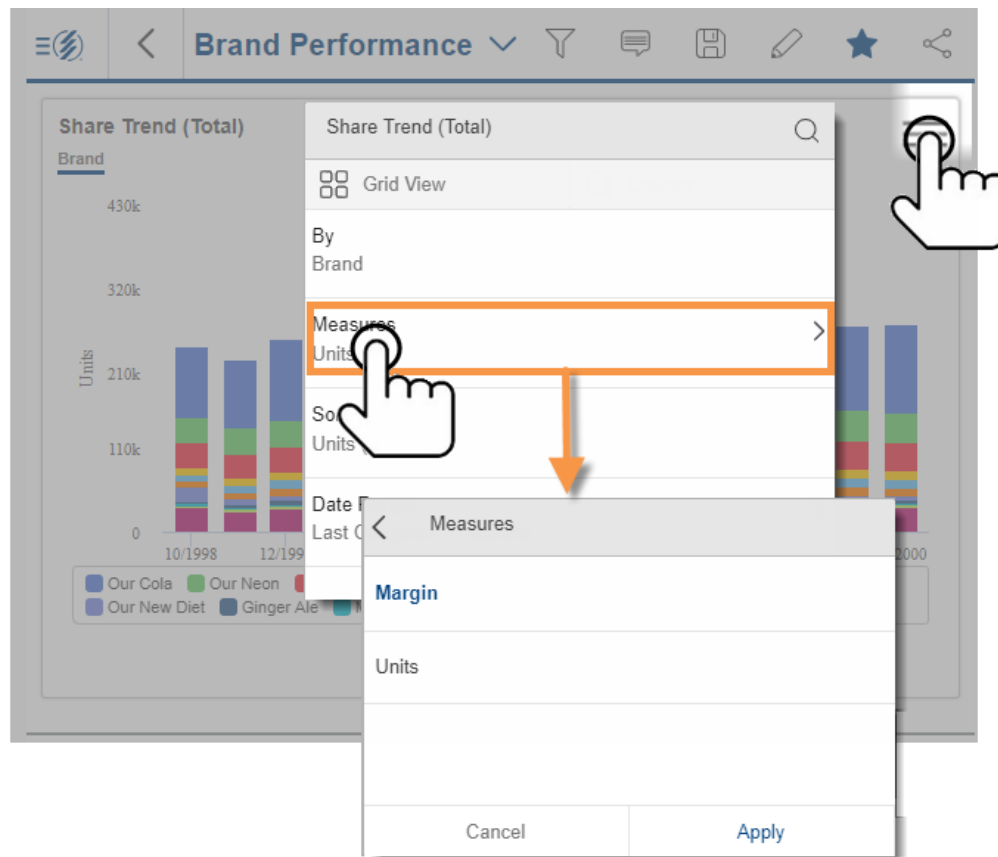
Go to the widget menu and tap the  icon. TAP and HOLD an item or tap the  icon; then, tap on any additional items you wish to pin. When you are finished selecting items, tap on **Pin** at the bottom of the panel.



Measure selection

Show/hide measures

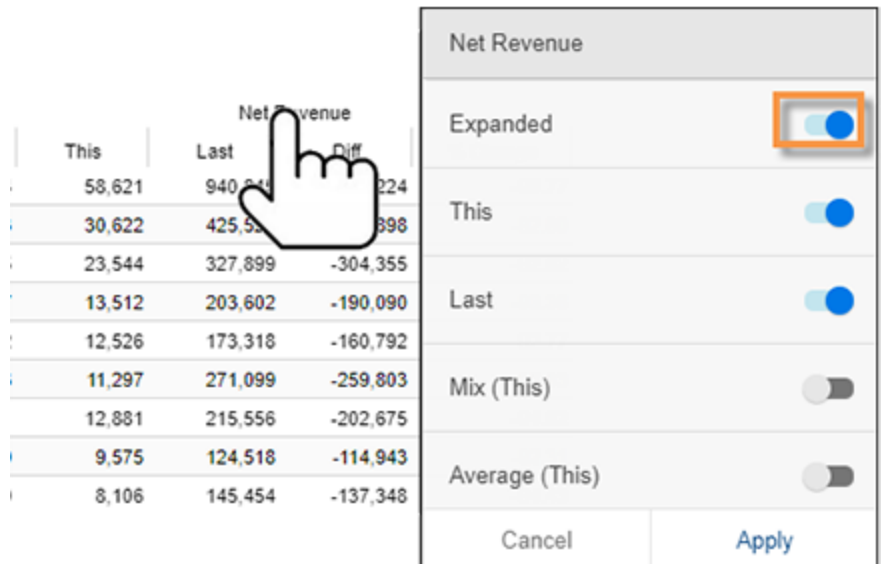
Pick the measures to show. The list includes measures that are preconfigured into the widget. Additional measures can be accessed in [explore mode](#) (see page 46).



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**.

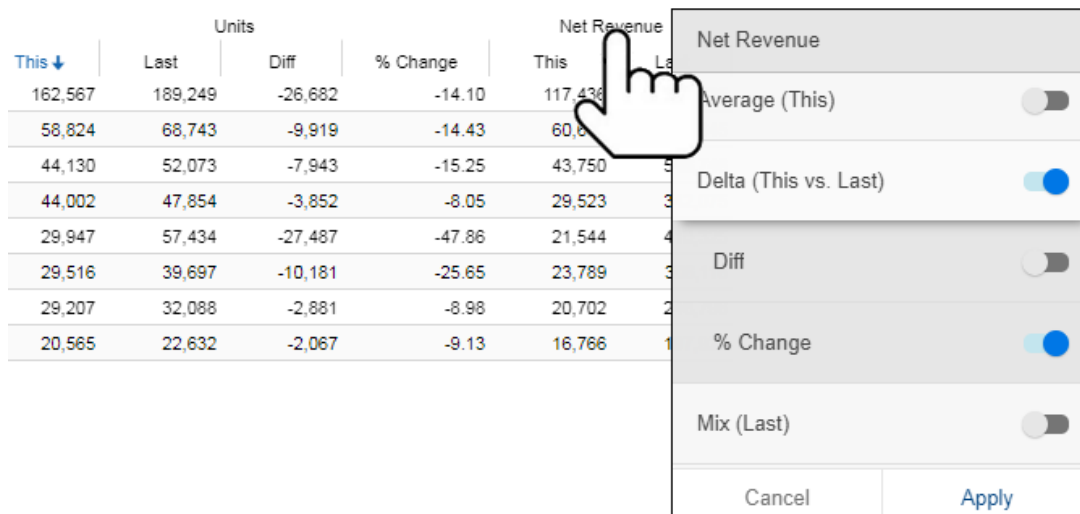


Mix, % change, and other computations

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**.



- 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)

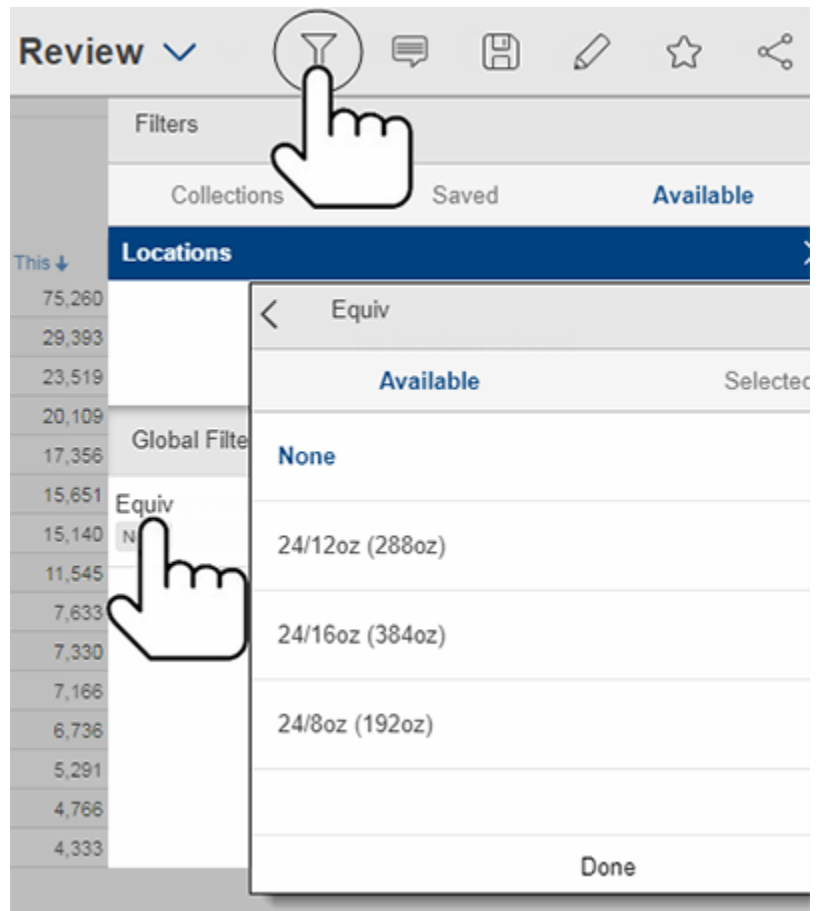
Equivalents

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.
- [Explore mode](#) (see page 37) provides another way to apply equivalents.



Select dates

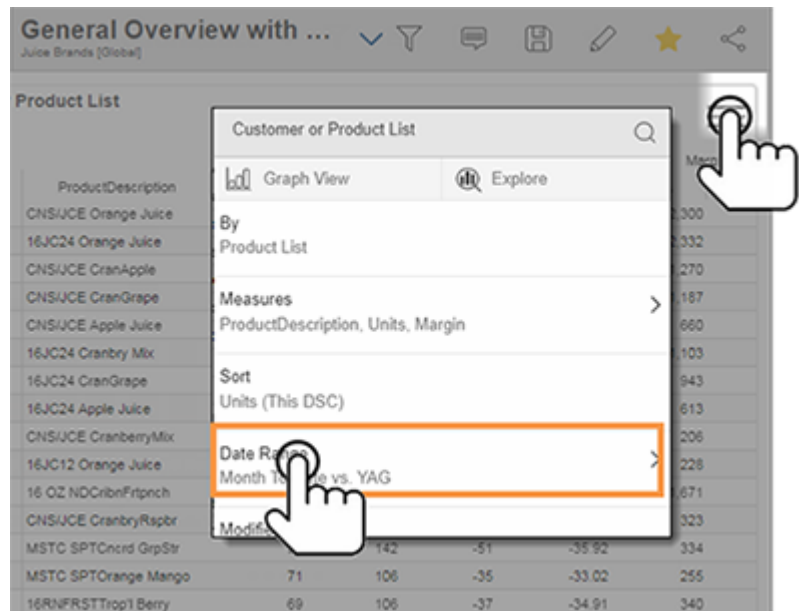
Dashboards show data for a range of dates (days, weeks, months, etc.) that can update automatically over time. Some widgets may also show an earlier date range to compare against. You may be able to change the dates depending on how the dashboard is configured. Date ranges are normally linked across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

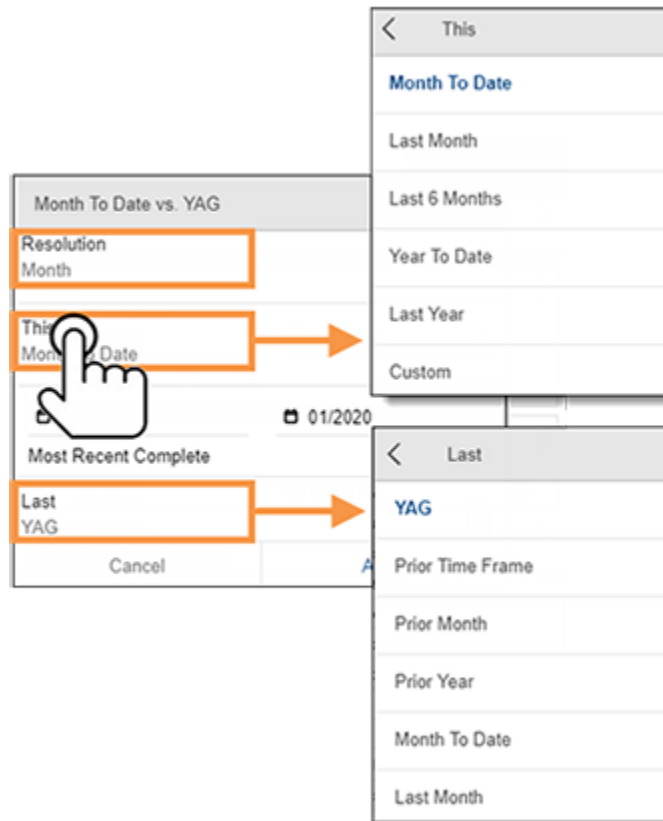


Quick-pick date options

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

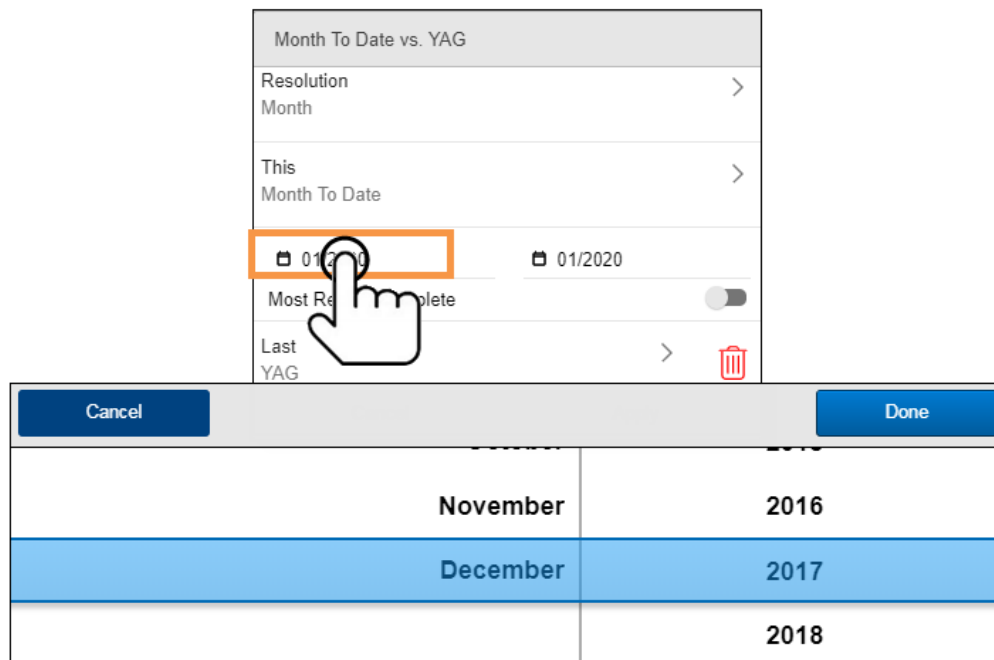
Then, tap on **This** date range to choose from a variety of pre-configured options (month-to-date, last month, year-to-date, and so on) for the selected resolution.

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.

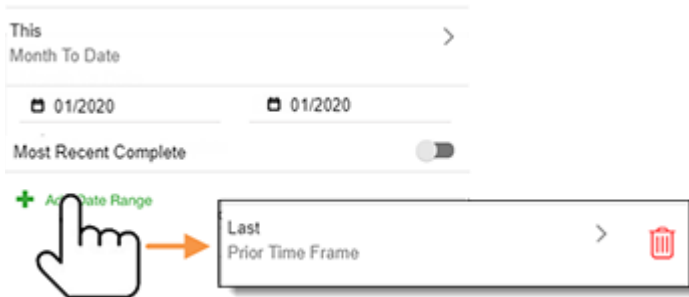


Date comparisons


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

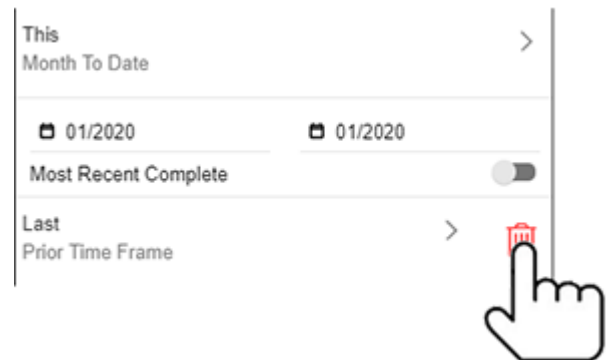
Compare two date ranges

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



Single date range

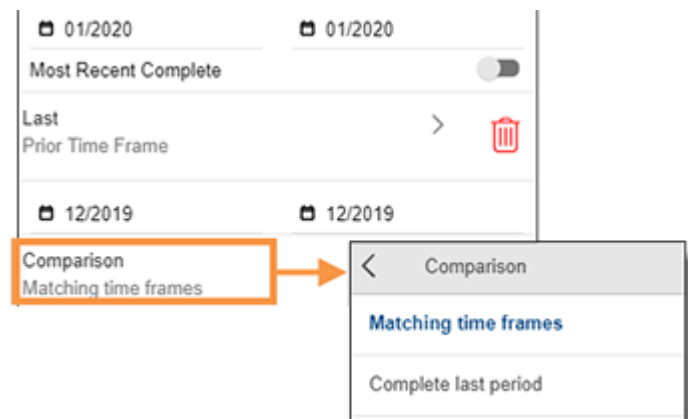
To look at a single date range, tap the  icon to remove the comparison date range.



Comparisons of incomplete timeframes

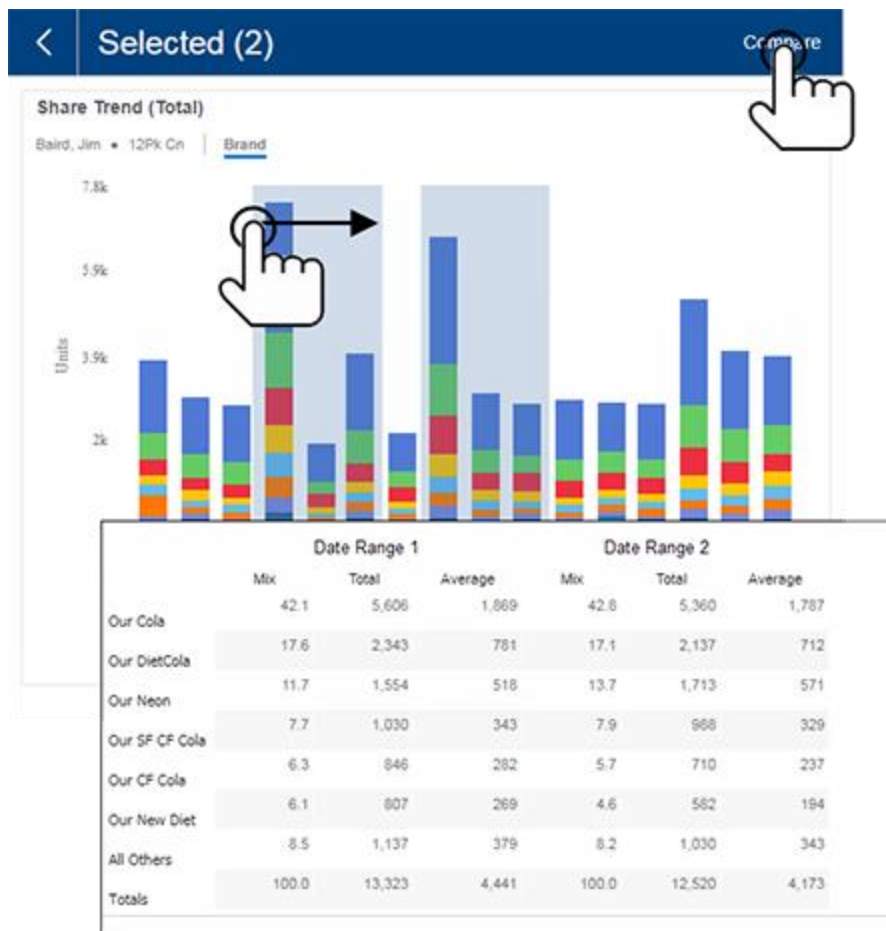
For a timeframe that isn't complete (e.g., current month), choose what to compare against.

- 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).



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.

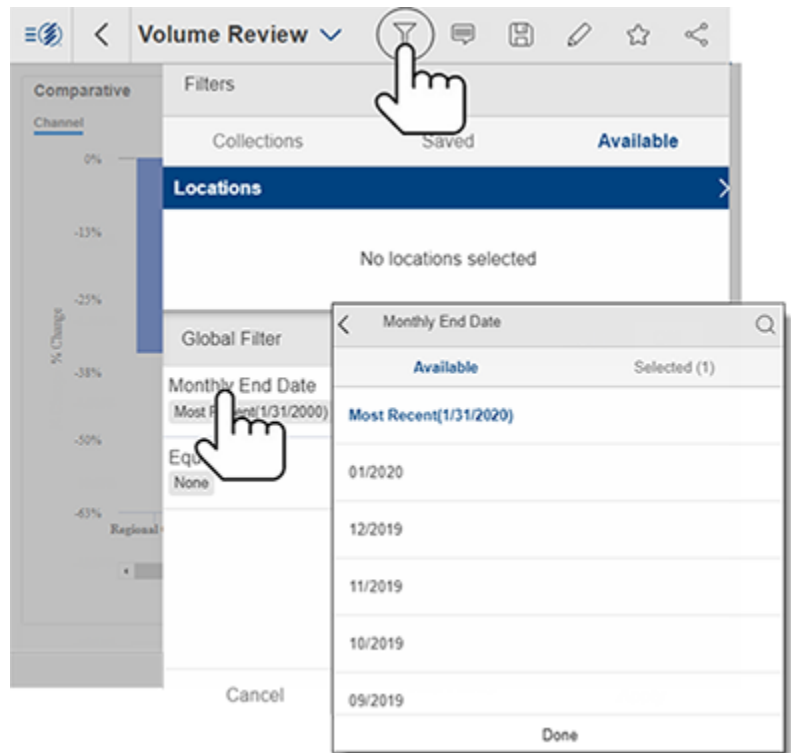


Additional methods of date selection

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.



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.

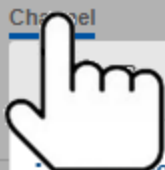
1st By	2nd By	3rd By	Units	
Channel ↑	KeyAccount	Brand	This	Last
> 3rd Party Operators			15,140	28,040
> All Othr On Premise			983	1,484
> Bars / Taverns			1,525	1,972
✓ Beverage Centers			7,330	9,190
Beverage Centers	> All Others		4,295	5,420
Beverage Centers	▼ Hanrahan		2,397	2,646
Beverage Centers	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 [explore mode](#) (see page **Error! Bookmark not defined.**).

Comparative

Channel




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

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

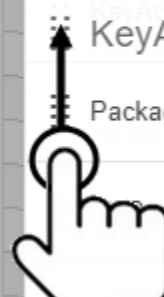
The Group By order controls what attribute is next when expanding a member or drilling down.

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



	Units	Last	Diff	%
Channel		115,504	-40,244	
KeyAccount		38,590	-9,197	
Package		30,926	-7,407	
		28,922	-8,813	
		22,752	-5,396	
		38,702	-23,051	
		28,040	-12,900	
		14,146	-2,601	
		14,054	-6,421	
		9,190	-1,860	
		10,486	-3,320	

Apply

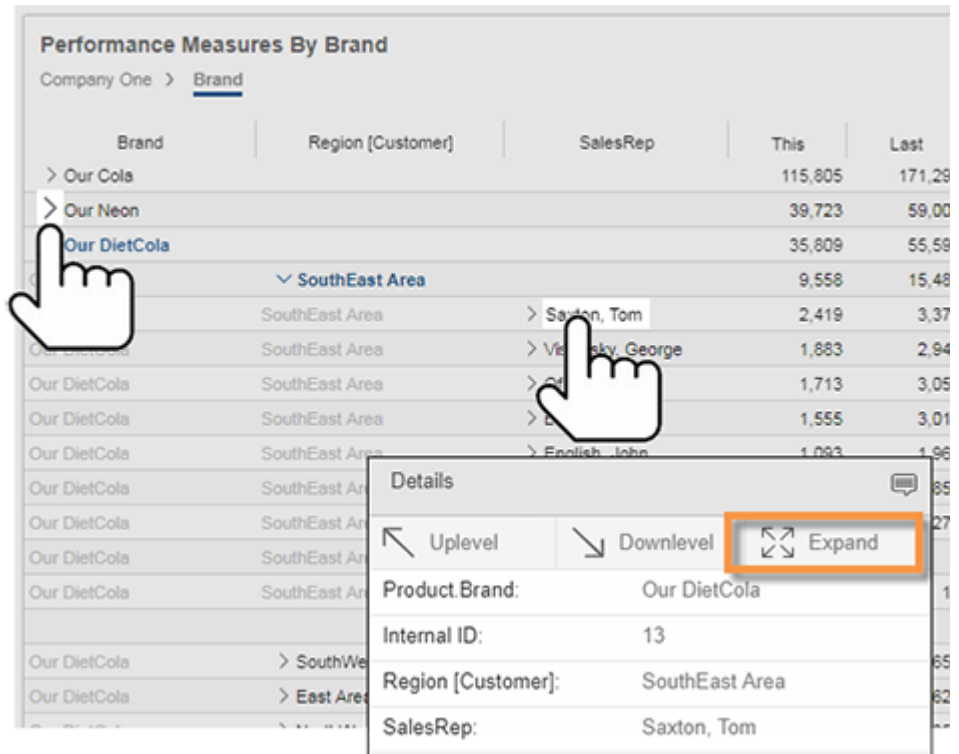
Grid expansion

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**.

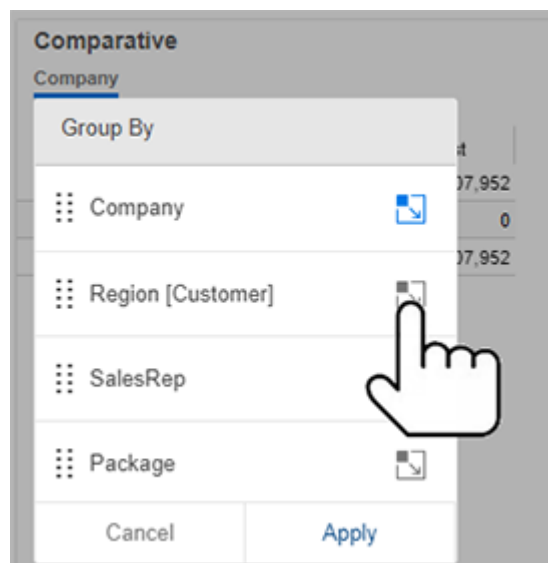
Tip: This method of expanding data is limited in a "flat view"; instead, you can turn on auto-expand (see below).




Expand all rows (auto-expand) in a grid

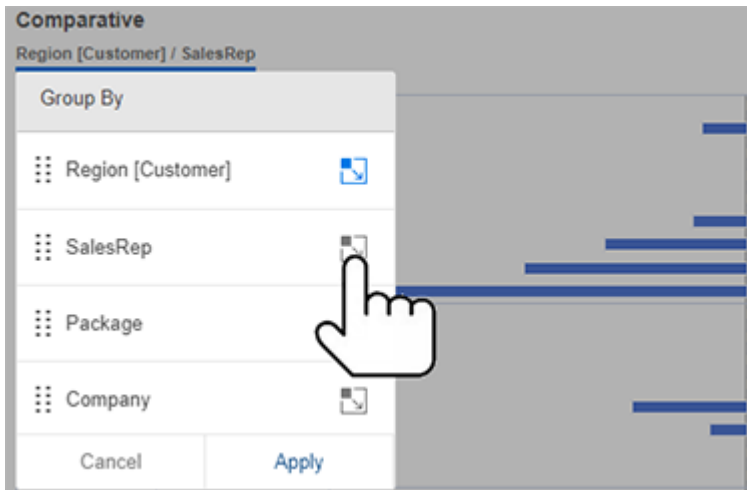
Tap the menu at the top the widget; then tap on  to automatically expand all members of a dimension(s) to the next level. The icon is blue when auto-expand is on.

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 [explore mode](#) (see page 37).




Graph expansion

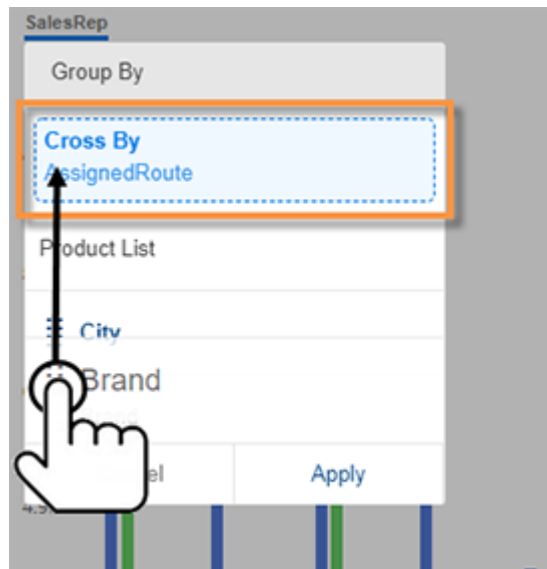
In comparative, multi comparative, and mix graphs, you can expand dimensions to see data broken down further by the next dimension. To expand data in graphs, tap the menu at the top the widget; then tap on  to turn on auto-expand.



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 [explore mode](#) (see page 37).

Cross By

Crosstab analyses show cross-sections 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.



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.

Comparative				
Channel	Units		Margin	
	This	Last	This	Last
Regional Chains	71,000	115,504	282,234	426,029
Conv With Gas	28,590	38,590	176,649	232,179
Other Groceries	30,926	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.

Channel	Totals	Passed	% Passed
Industrial	578		
Schools	459		
Fast Food	395		
Restaurants	411		
Other	283		
Conv	197		
Bars / Taverns	212		
All Othr On Premise	1,122		
Hosp/ls/Nursing Hmes	126		
Recreation	444		
Clubs	115		
Government Accounts	144		

Details	
Downlevel	Expand
Customer.Channel:	Fast Food
Internal ID:	56
(Totals):	395
Passed (This):	166
Passed (Last):	171
% Passed (This):	42.0
% Passed (Last):	43.3
Failed (This):	229
Failed (Last):	229

229 Failed (This) - Fast Food			
[Units >= 1]			
Customer	CustName	This	Last
03386	DENNIS HOMEMADE ICE CREAM	0	0
04976	THE GREAT ESCAPE	0	0
06189	IRON KETTLE FARM	0	0
06890	LA BELLA PIZZA	0	0
07150	LOWMAN FLEA MARKET-CONCESSION	0	0
03508	DOG HOUSE	0	0
00610	BAGELS NORTHEAST INC	0	0
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.

Comparative

SouthEast Area > Serv-Rite > **Record Details**

Date ↑	Invoice	CustName	ProductDescription	Units	Gross Revenue
				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	20OZ 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	20OZ ND Sunny Delite	42	59
1/5/2020	00593737	FINE HOST / DROP SHIPMENT	20OZ 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.

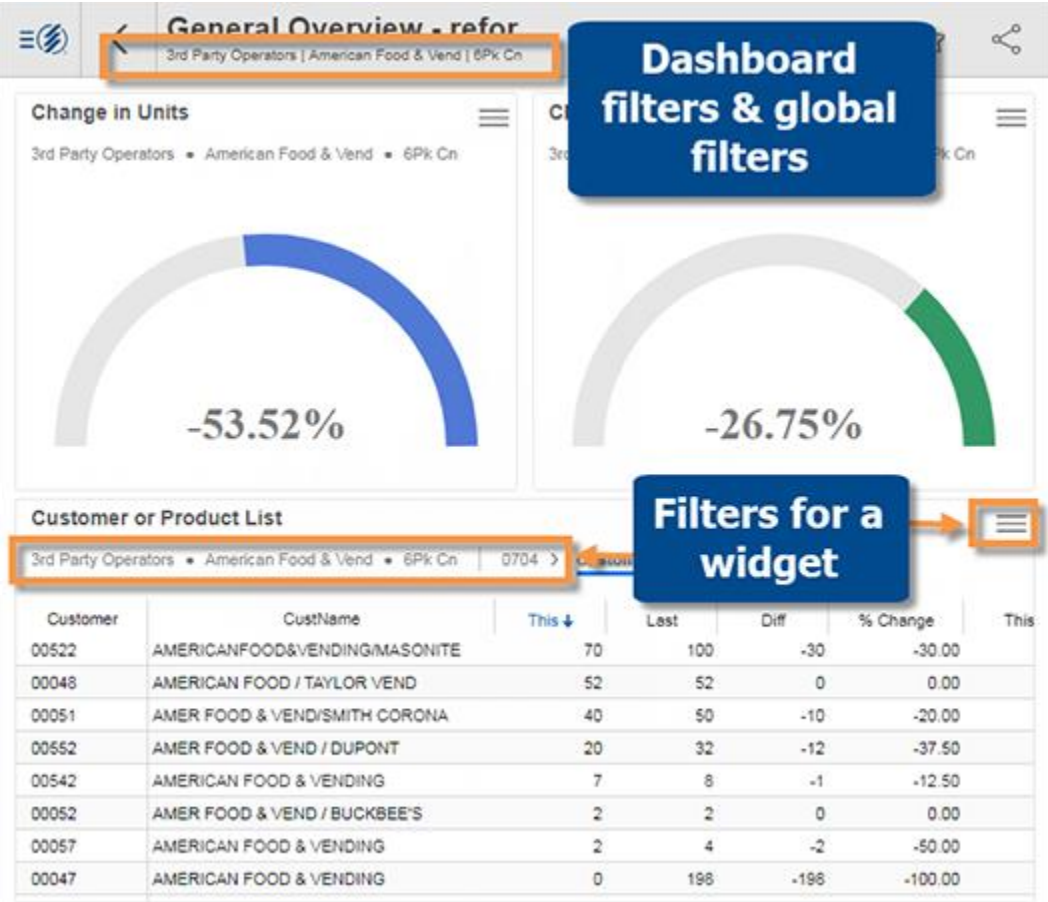
Filter

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.

Tip: The dashboard heading shows dashboard filters & global filters. The path at the top of each widget shows the filters that affect it. For a full listing of widget filters, tap on the widget menu icon .



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.

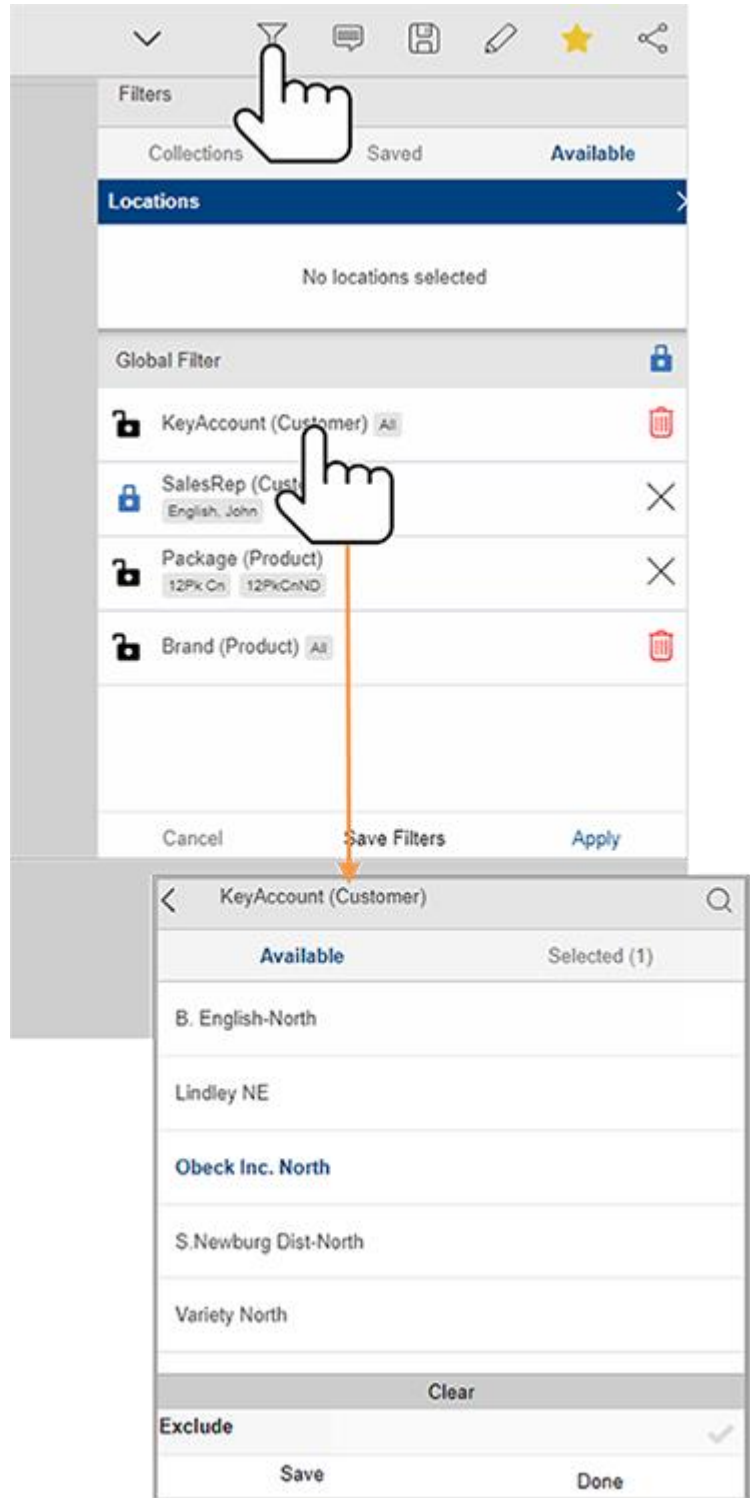
You can access this type of filter in the Filters panel. In addition to built-in dashboard filters, the filters panel shows any applicable global filters  that are turned on.

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

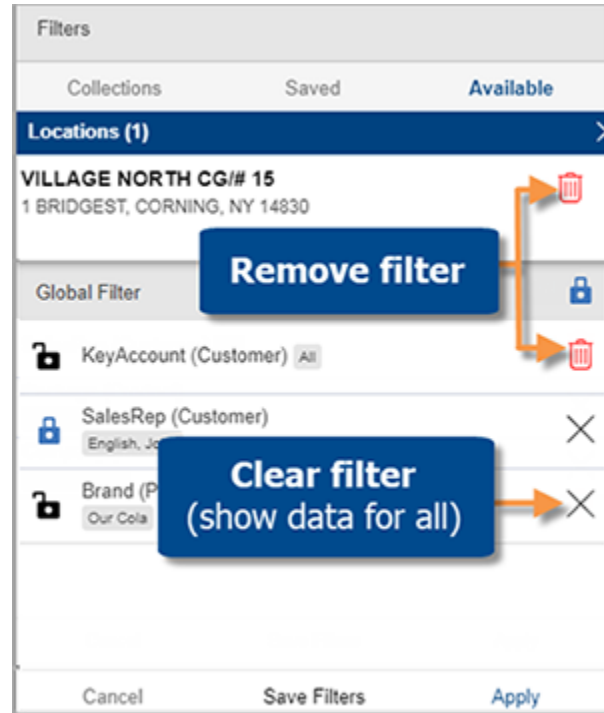


To clear or remove a filter

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

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

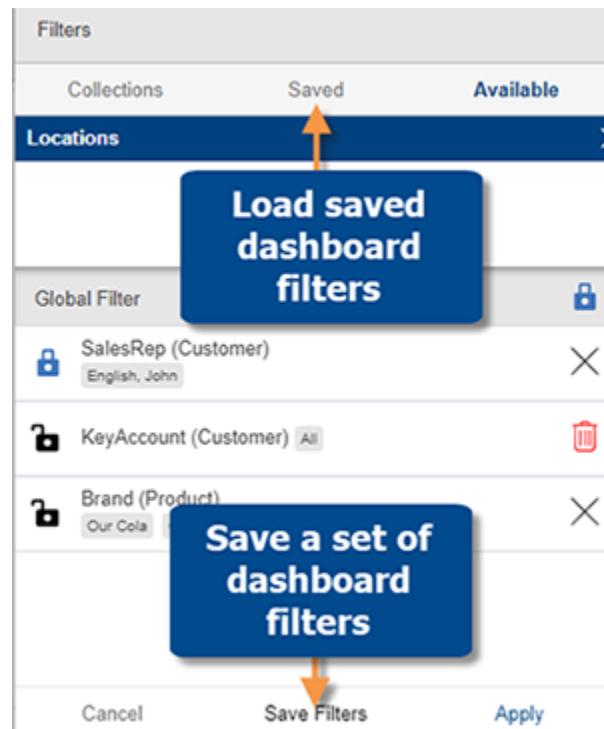
Tip: You cannot remove a filter if it has a corresponding filter widget in the original dashboard.



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

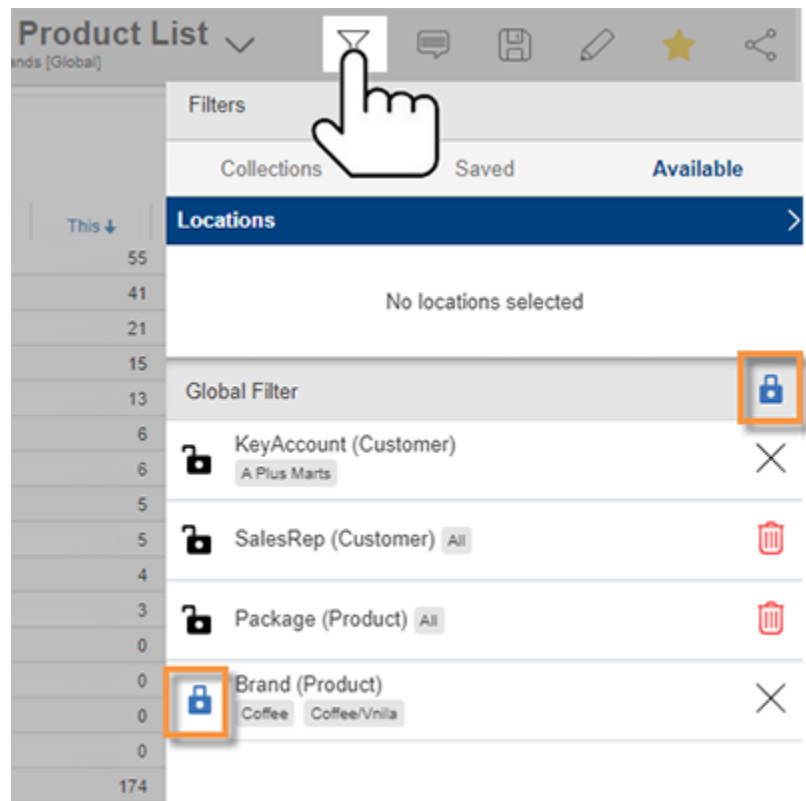
You can turn on a global filter(s) to stay focused on any subset of the data as you use different dashboards. When you open another dashboard, applicable global filter(s) (see below) will remain locked on.

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  icon to turn on the filter globally (i.e., lock on .

To lock/unlock all of the dashboard's filters at once, tap the / 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:

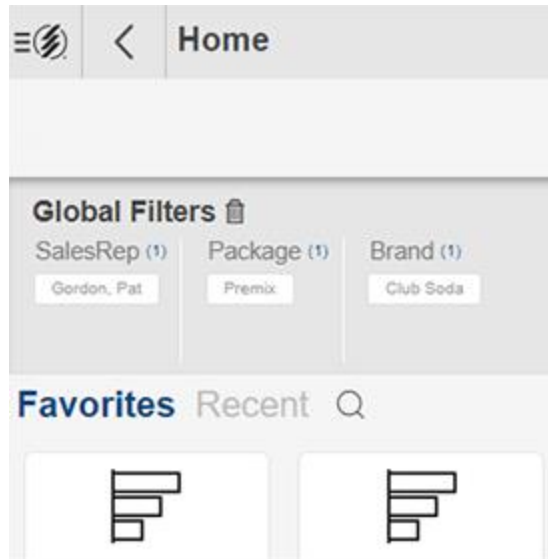
- The filter's dimension is a "group by" in the dashboard.
- The dashboard has a dashboard filter for the dimension.
- The filter is based on a collection.

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 [settings \(see page 61\)](#).

Clear global filters

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

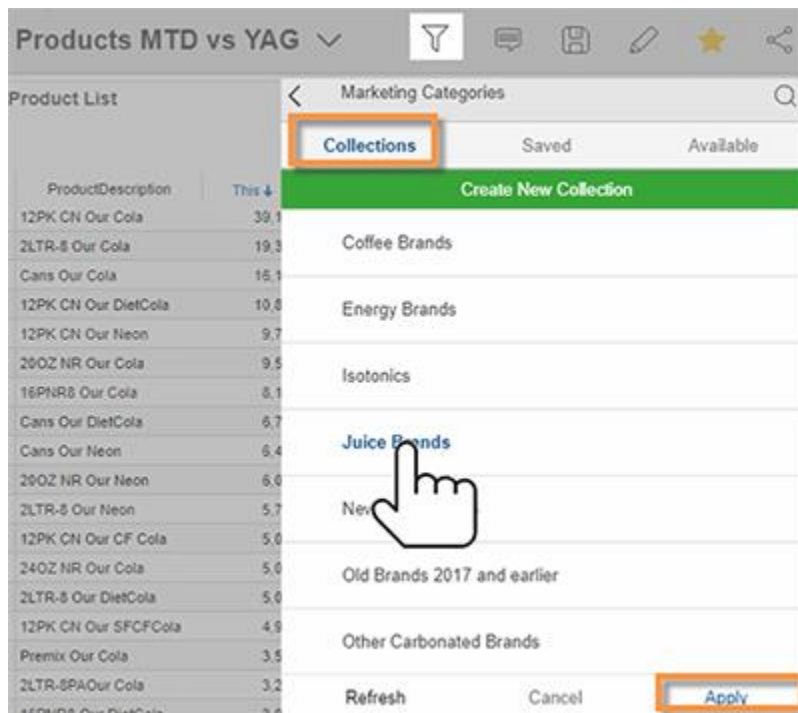


Collections

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).



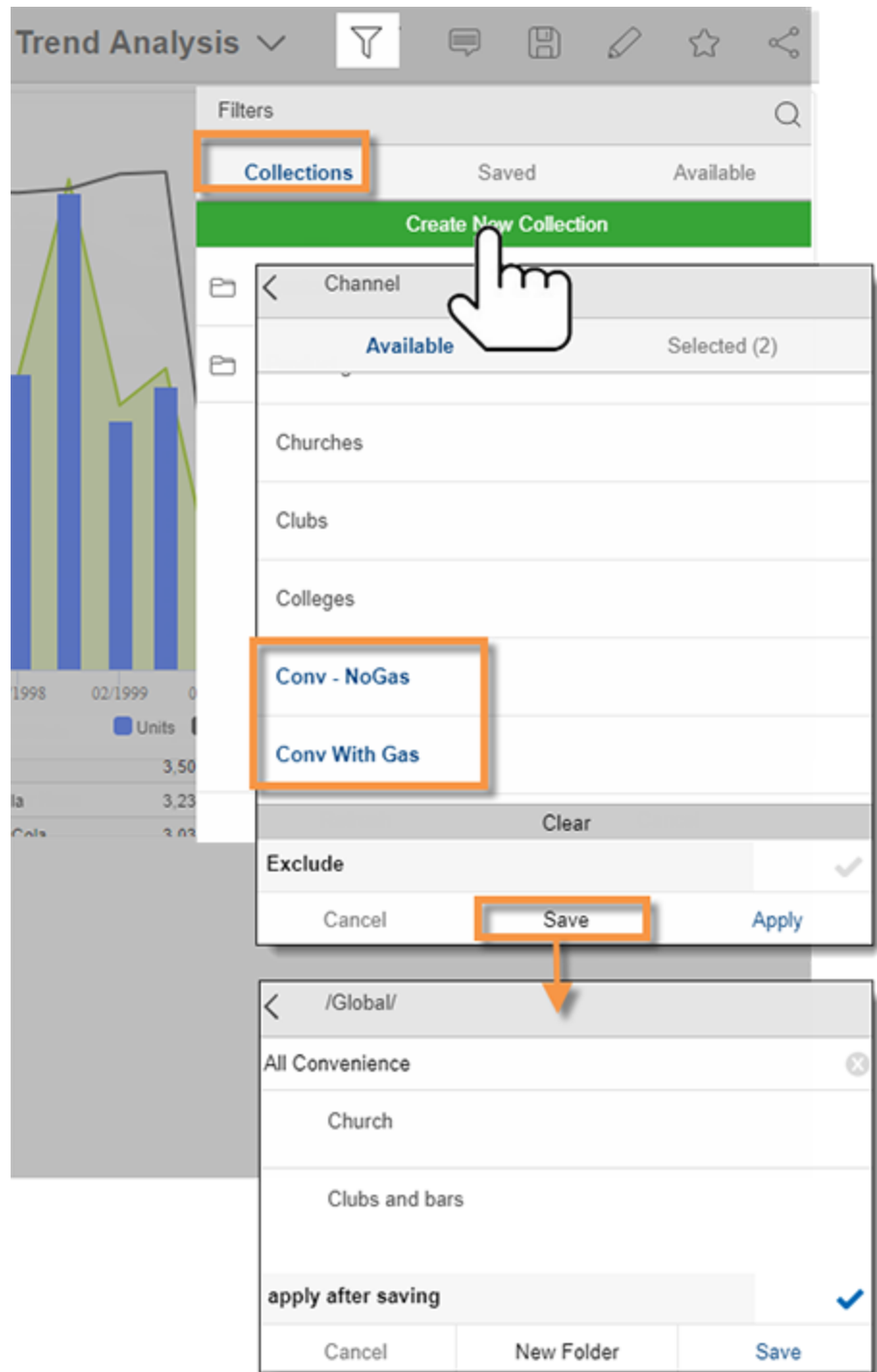
Create a collection

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 pre-built into the dashboard.
- Available folders (private or global/shared) depend on user account settings.



Ad-hoc filter selection using collections:

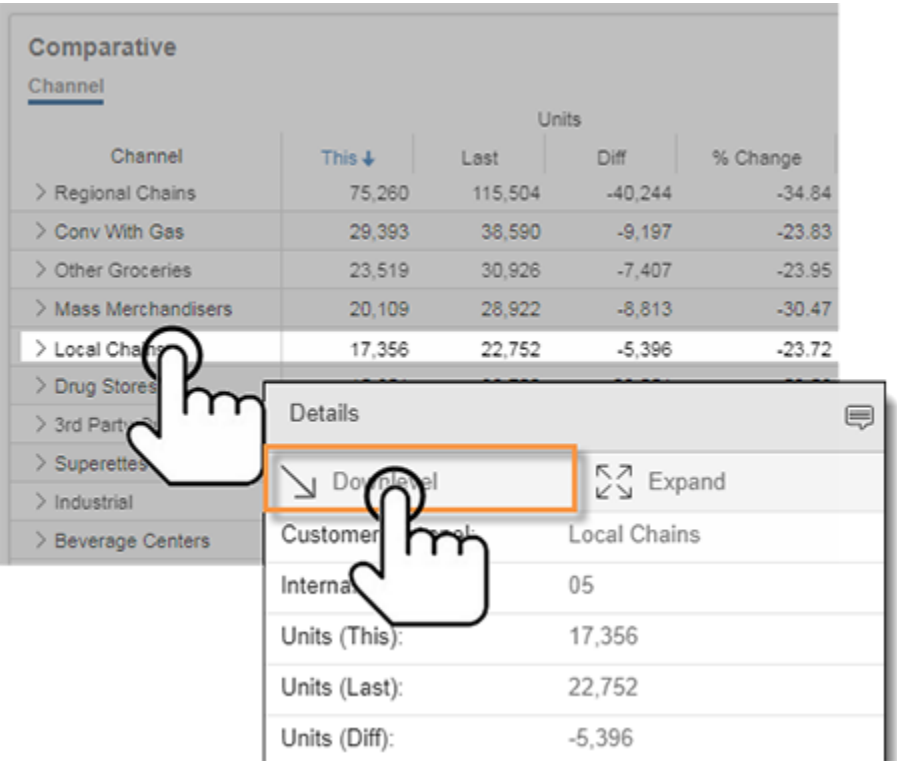
You can filter on members without saving them as a collection. After selecting members, tap on **Apply** at the bottom of the panel.



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:

- 1) Touch and hold to select.
- 2) Choose the **Drill** option at the top of the screen.

Comparative (2)

2. Drill into selected

1. Touch & hold

Channel	This ↓			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 Chains				-23.72
Drug Stores				-59.56
3rd Party Operators				-46.01
Superettes				-18.39
Industrial	7,633	14,054	-6,421	-45.69
Beverage Centers	7,330	9,190	-1,860	-20.24
Fast Food	7,166	10,486	-3,320	-31.66
Schools	6,736	9,524	-2,788	-29.27
Conv - NoGas	5,291	7,354	-2,063	-28.05
Hospitals/Nursing Homes	4,766	6,212	-1,446	-23.28

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

Comparative

Our Company | Company One | **Channel**

Units

This ↓	Last
33,212	50,114
13,839	18,156
10,439	13,530
8,791	12,674
8,774	11,222
> Drug Stores	6,829
> 3rd Party Operators	6,318

Edit

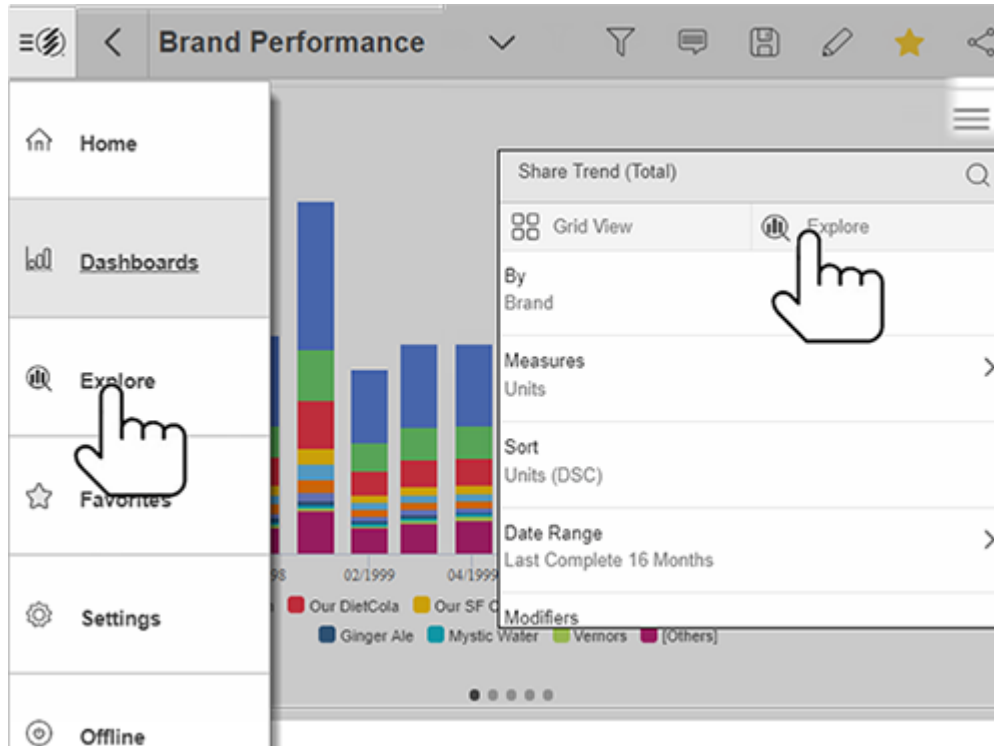
Remove

Clear Filters

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



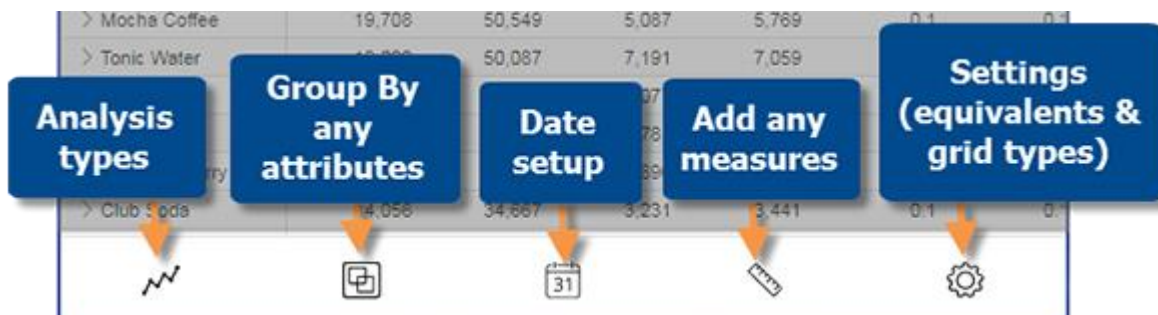
Option 1: Default starting point

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

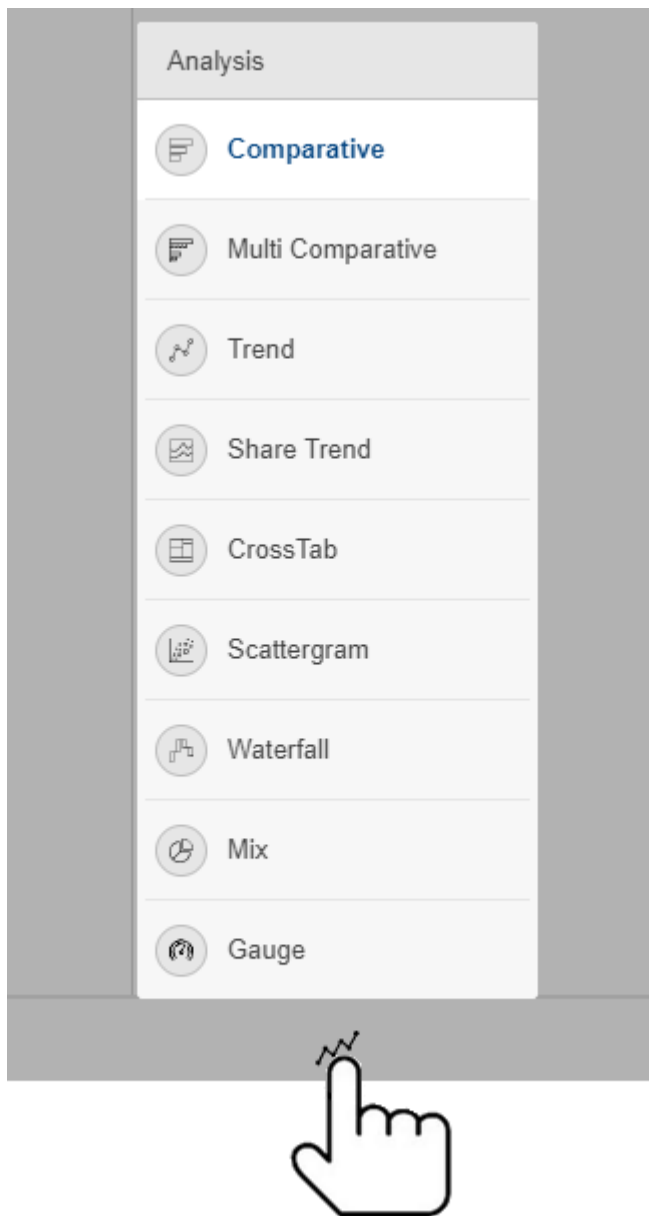
Option 2: Start with any widget


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

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



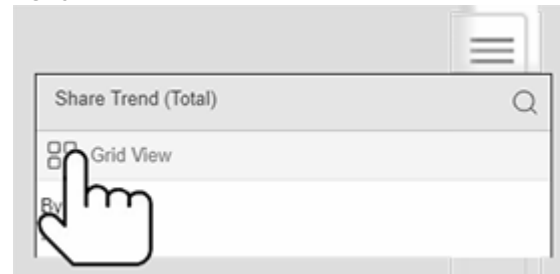
Change the analysis type



In explore mode, tap the  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.



- 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

Region	Units		Margin	
	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

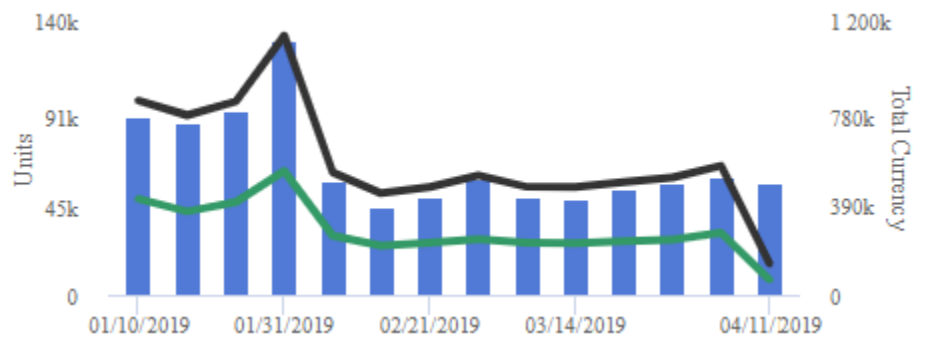
Multi Comparative

Comparison of members for any number of date ranges

Channel ↑	Month To Date vs. YAG - Drops		Year To Date vs. YAG - Drops	
	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

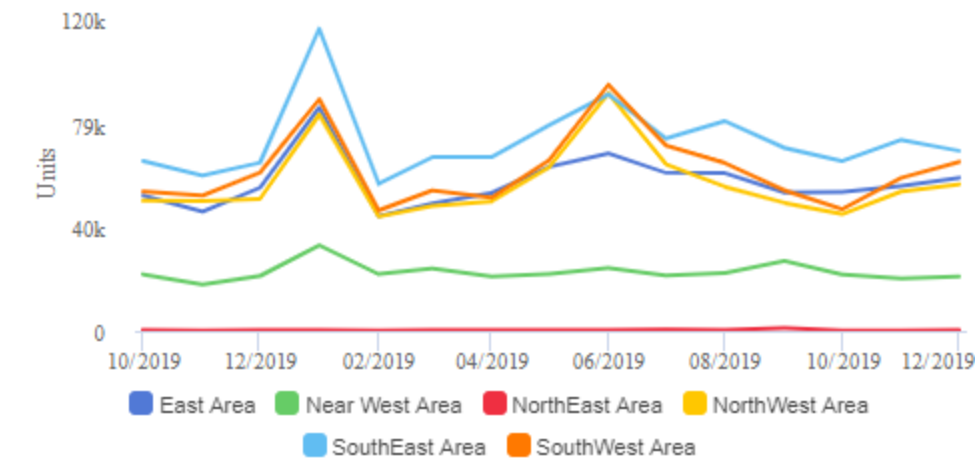
Trend

Trend over time for one or two date ranges



Share Trend

Comparison trend for multiple members



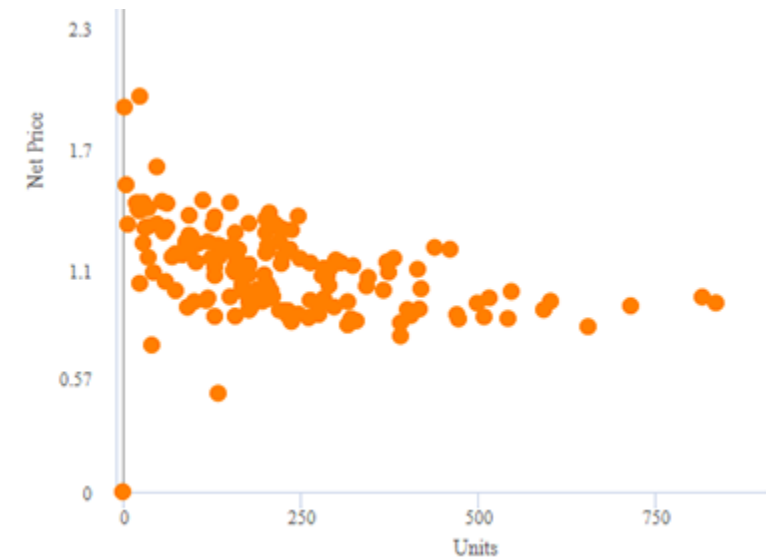
CrossTab

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

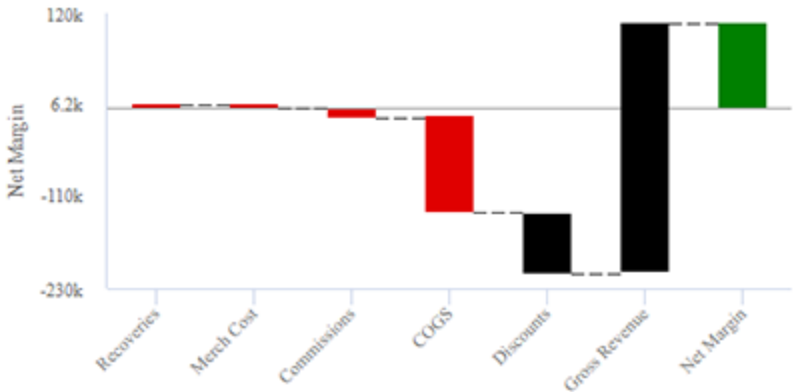
Scattergram

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



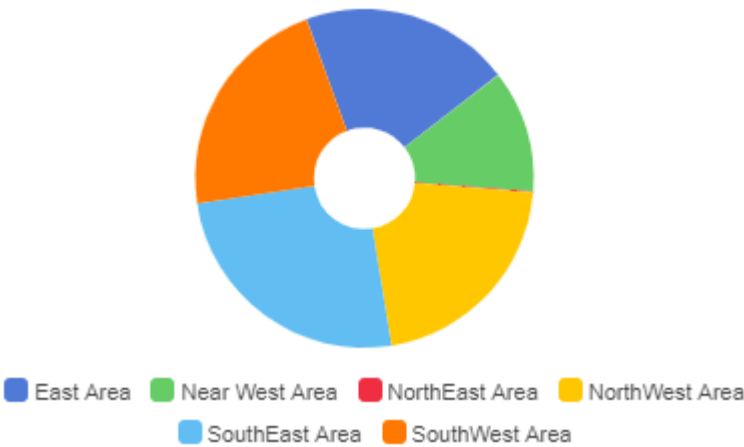
Waterfall

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



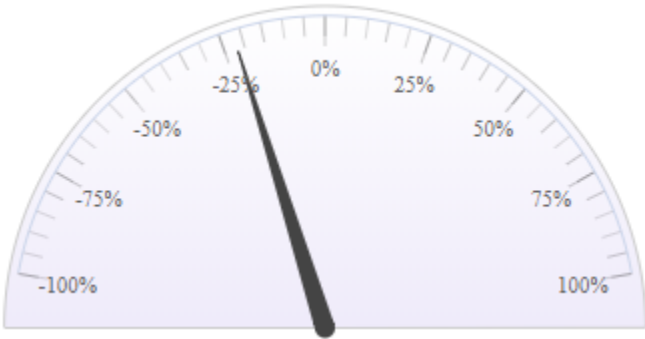
Mix

Percent of the total for multiple members




Gauge



A simple visual tool showing performance for a single measure

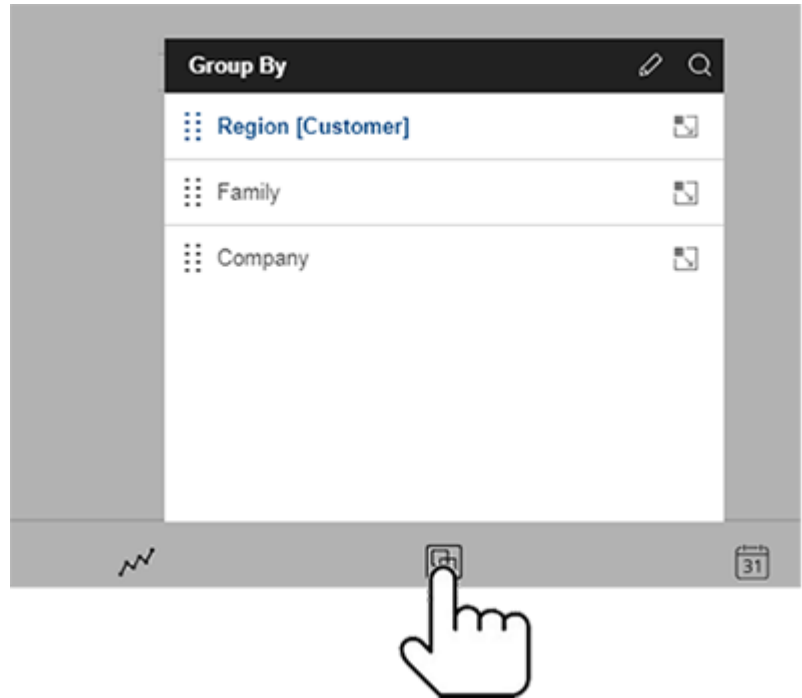


Group By any attribute

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).

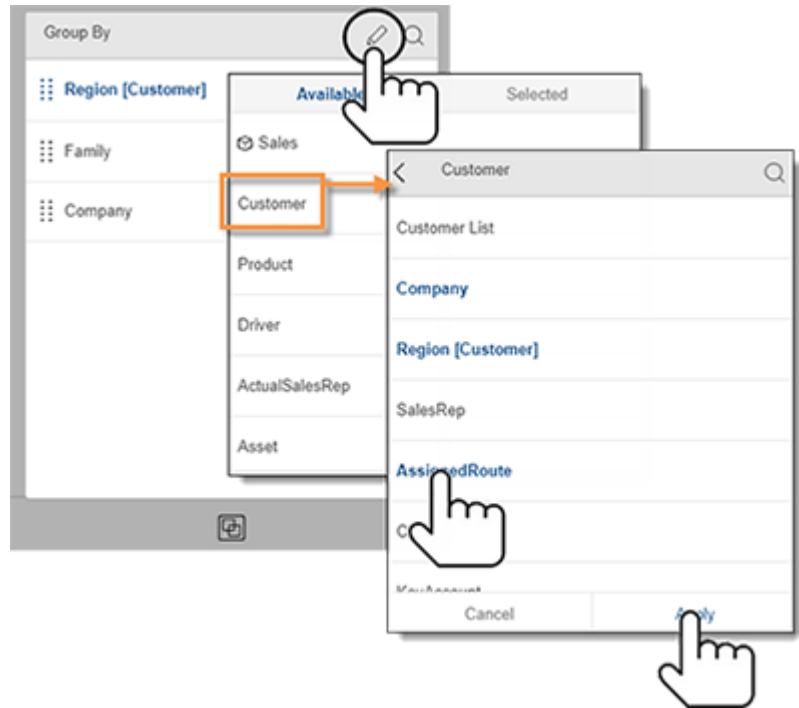


Add an attribute

Option 1: Select from a list

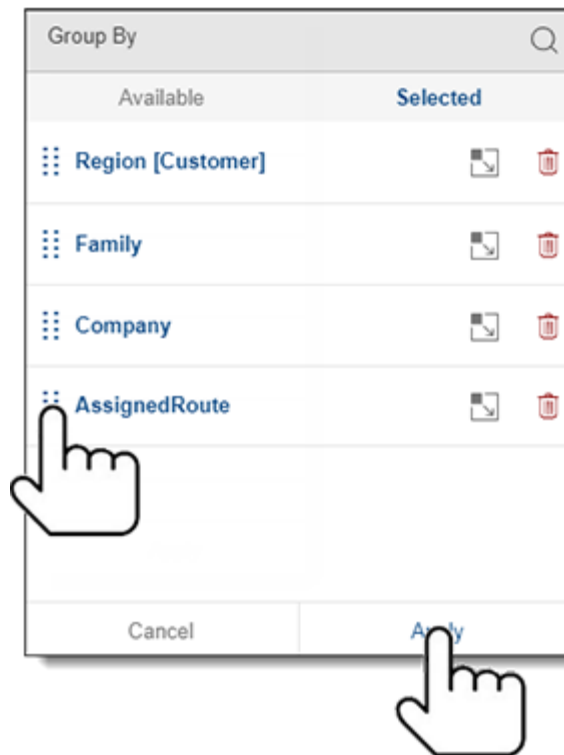
1. In the Group By area, tap .
2. Select the key (what the attribute describes).
3. Tap on the attribute(s) to select it. The attribute(s) should now be **blue**.
4. Tap on **Apply**.

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.

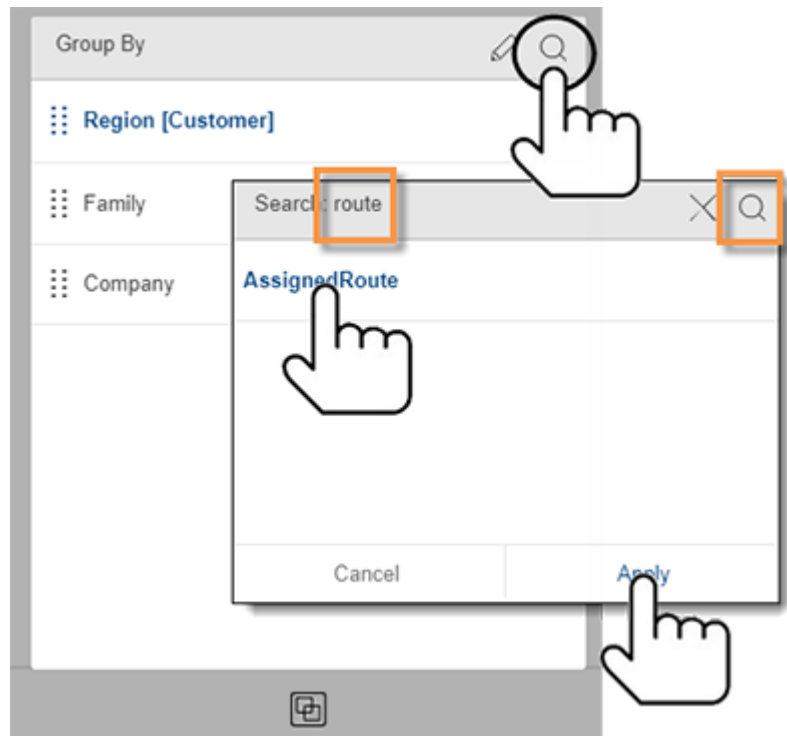
5. To group data at the highest level (i.e. 1st By), tap on the attribute or drag it to the top of the list; then **Apply**.



Option 2: Search for an attribute



1. In the Group By area, tap .
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.

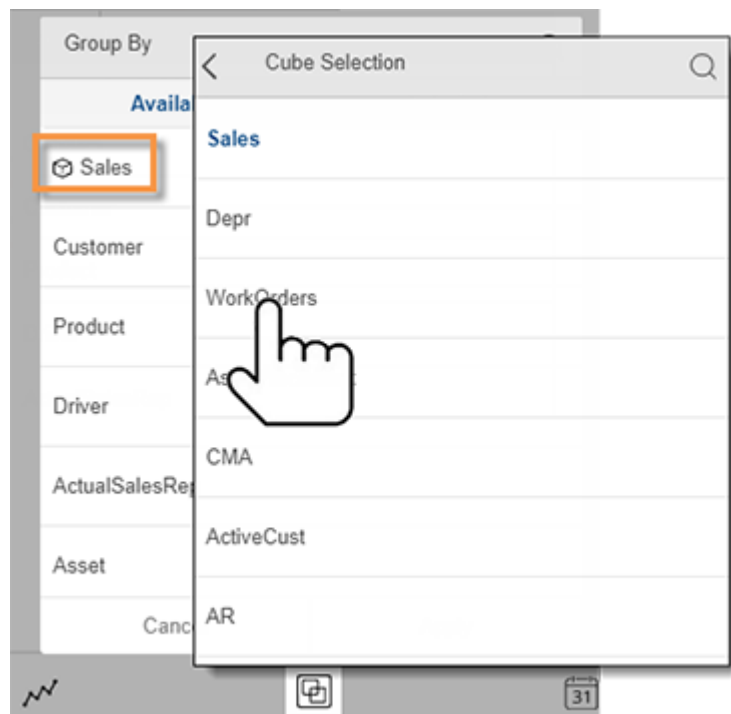


Change the data cube

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

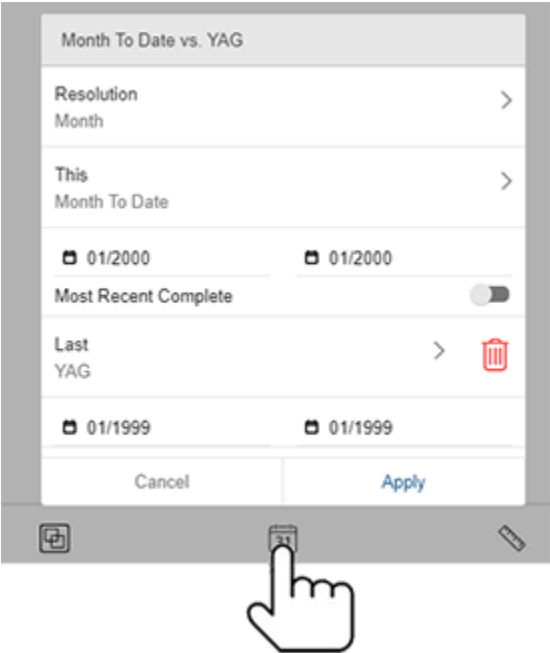
Tip: This may change the measures that are available.



Date setup in explore mode

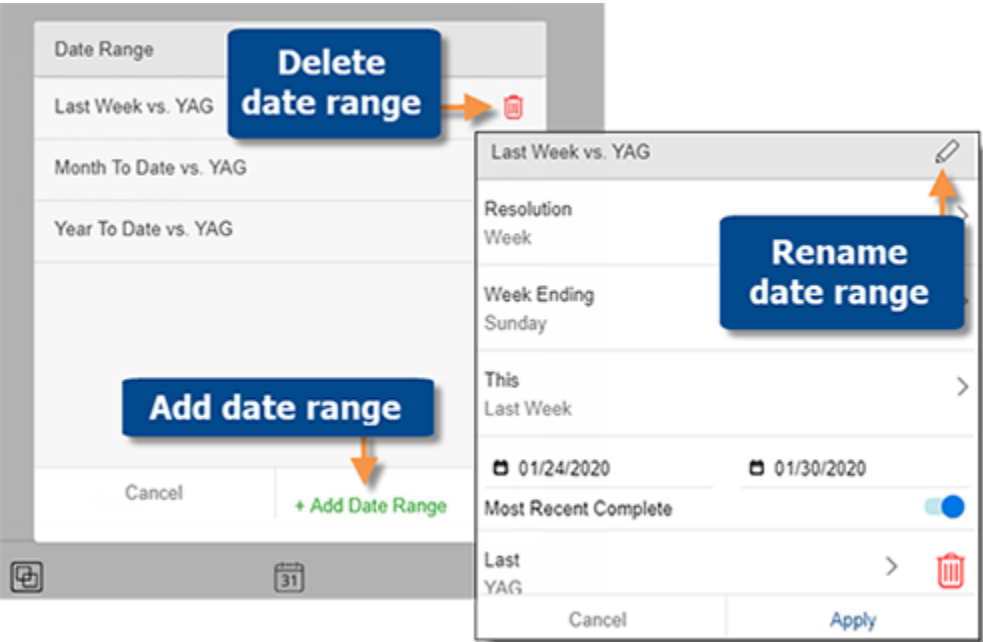
Tap the  button at the bottom of explore mode to access date setup options.

In general, these are the same as [date options](#) (see page **Error! Bookmark not defined.**) in the widget menu.




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

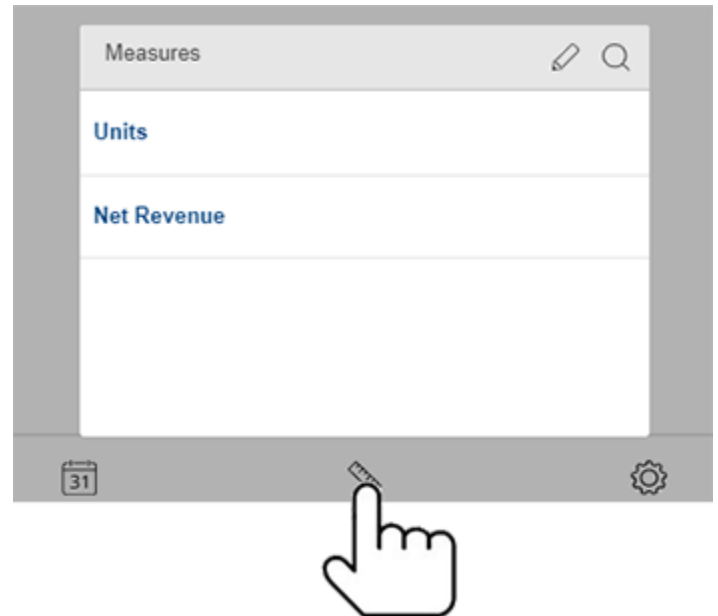
In explore mode, you can add any measure from the dataset.

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

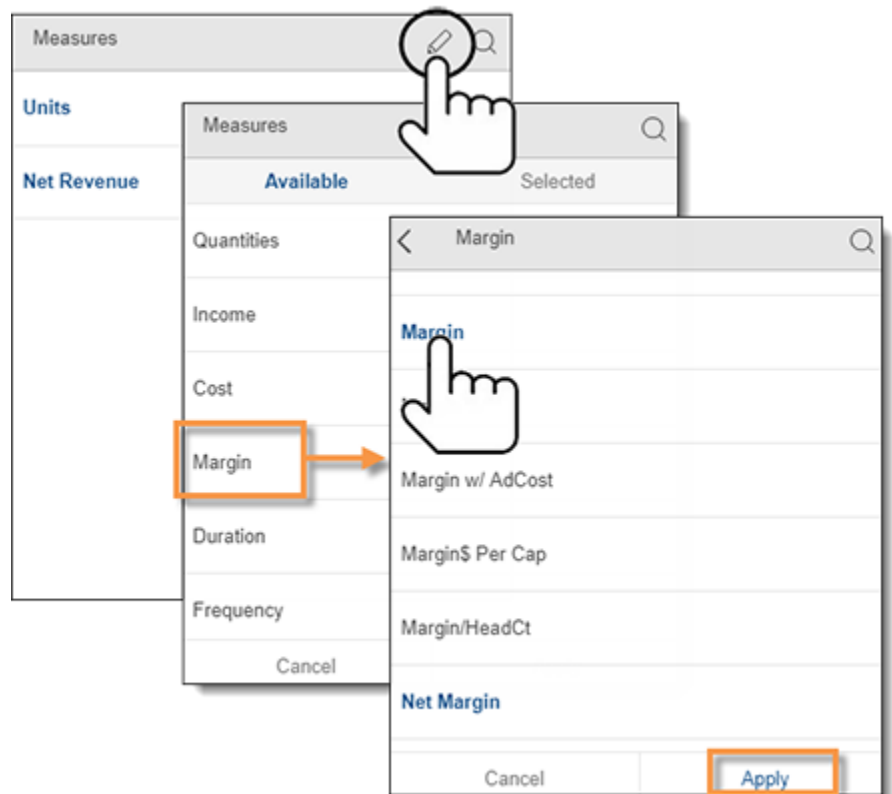
To add any other measure, select it from a list of available measures or perform a search (see below).





Option 1: Select from list

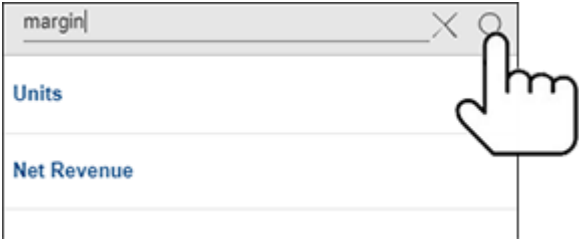
1. In the Measures area, tap .
2. Select the data category (quantities, income, costs, etc.).
3. Tap on the measure(s); then **Apply**. You can add multiple measures.

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



Option 2: Search


1. In the Measures area, tap .
2. Enter part or all of the name and tap  again to perform the search.
3. Tap on the measure; then **Apply**.
4. This takes you to a list of the selected measures. You can then apply your changes.

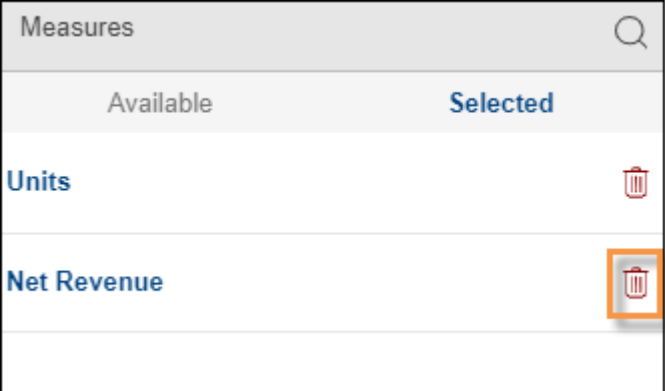


Tip: If you don't see the desired measure, it may not be available for the given context. For example:


- The available measures are limited to data cube(s) associated with the current Group By; therefore, you may need to change the [data cube](#) (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.

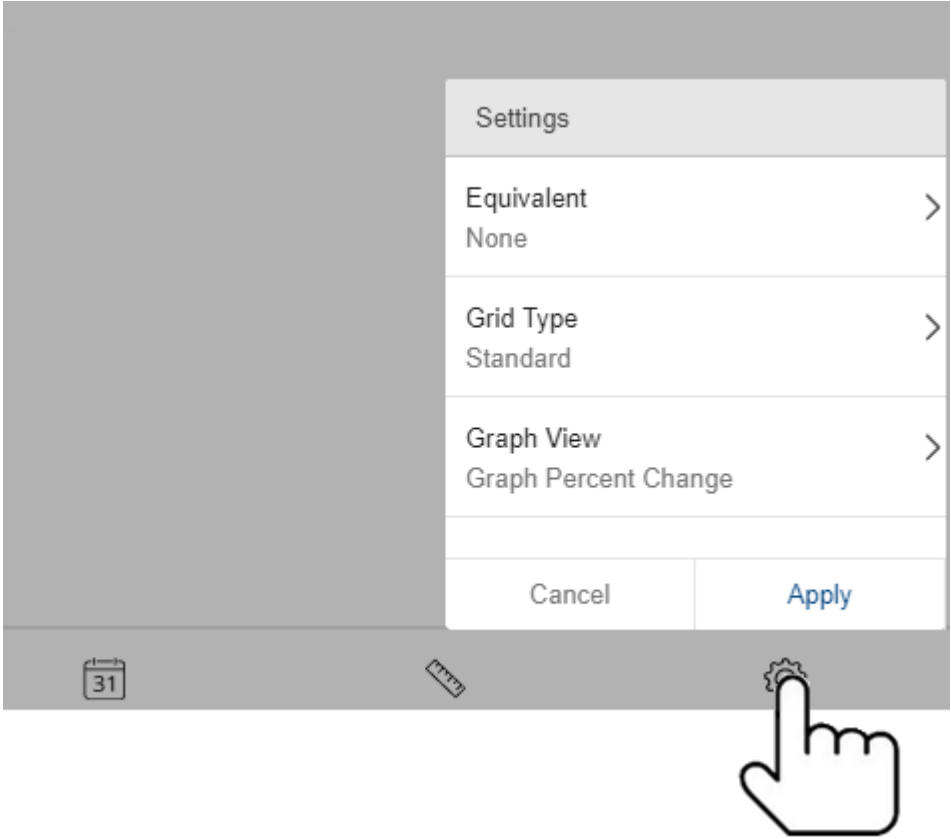
To delete a measure

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



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**.



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

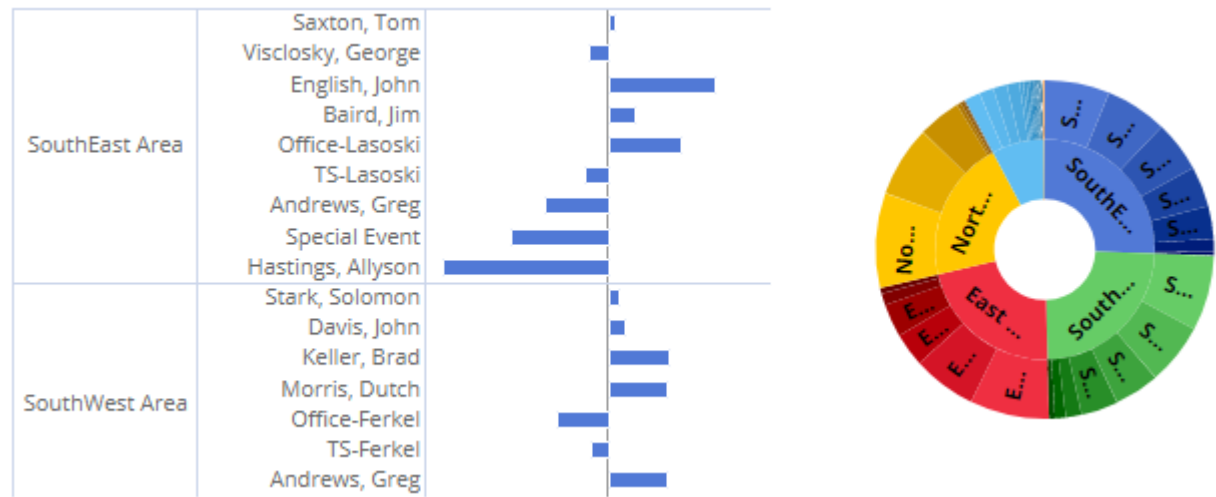
The grid type affects the layout of columns and rows. In addition, some graphs are affected by the grid type when auto-expand is on. The grid type can be changed in the settings area of explore mode. The available types depend on the analysis (e.g., comparative, mix, etc.).

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.)

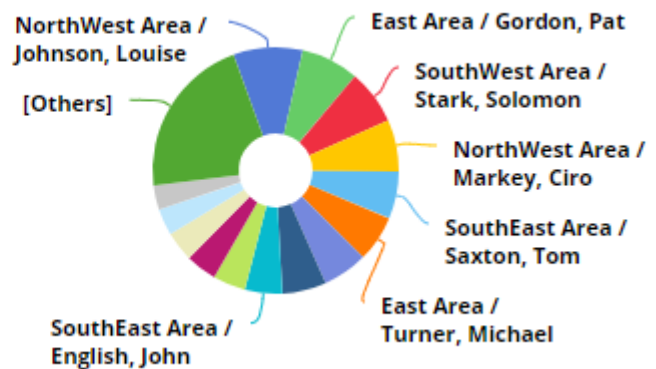


Flat view grid type

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.

Region	SouthEast Area	SouthWest Area	NorthWest Area
Units This ↓	73,794	60,364	57,685
Last	116,284	89,170	83,206
Margin This	32,384	26,234	24,646
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

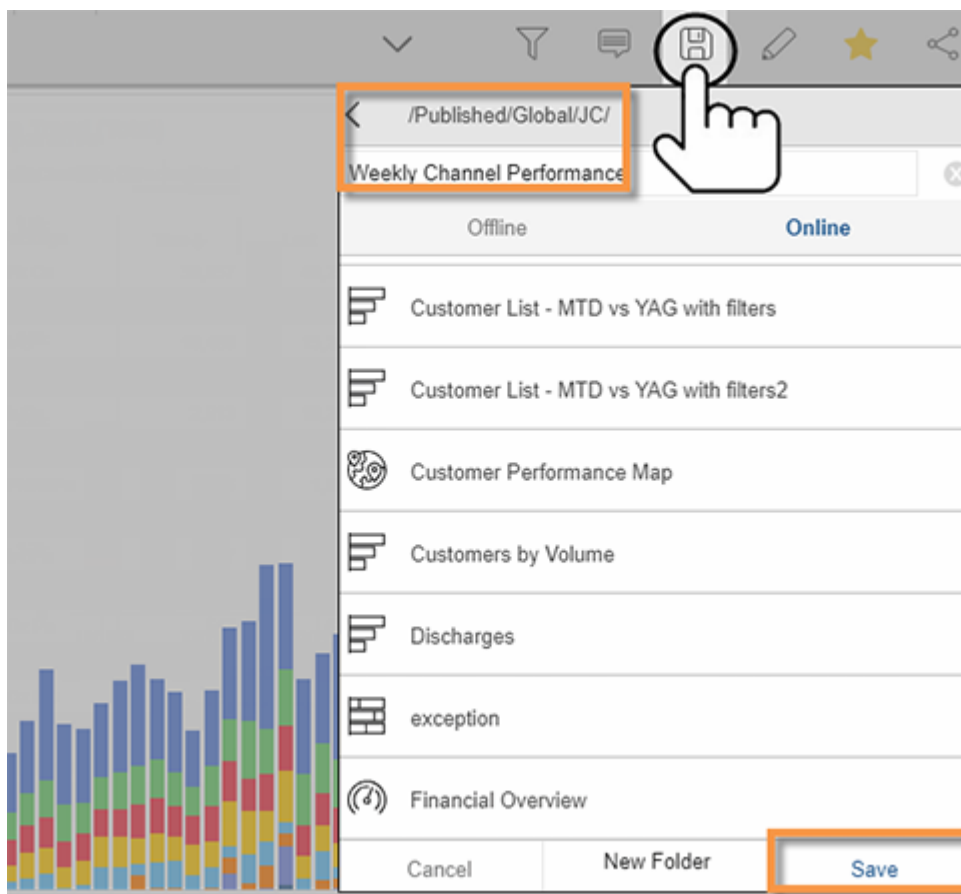
For some analysis types, you can graph actual values or the percent change. This setting does not affect widgets that use custom programming (i.e., custom views).

Save and Share

Save

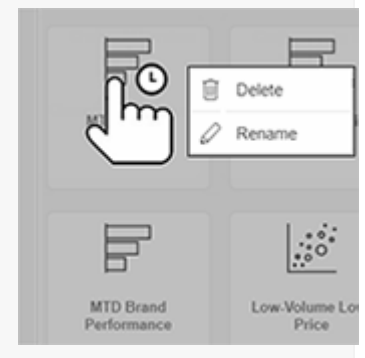
You can save your changes to a dashboard. For example, make common selections and then save changes in a new dashboard to return to it later.

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.



Tips:

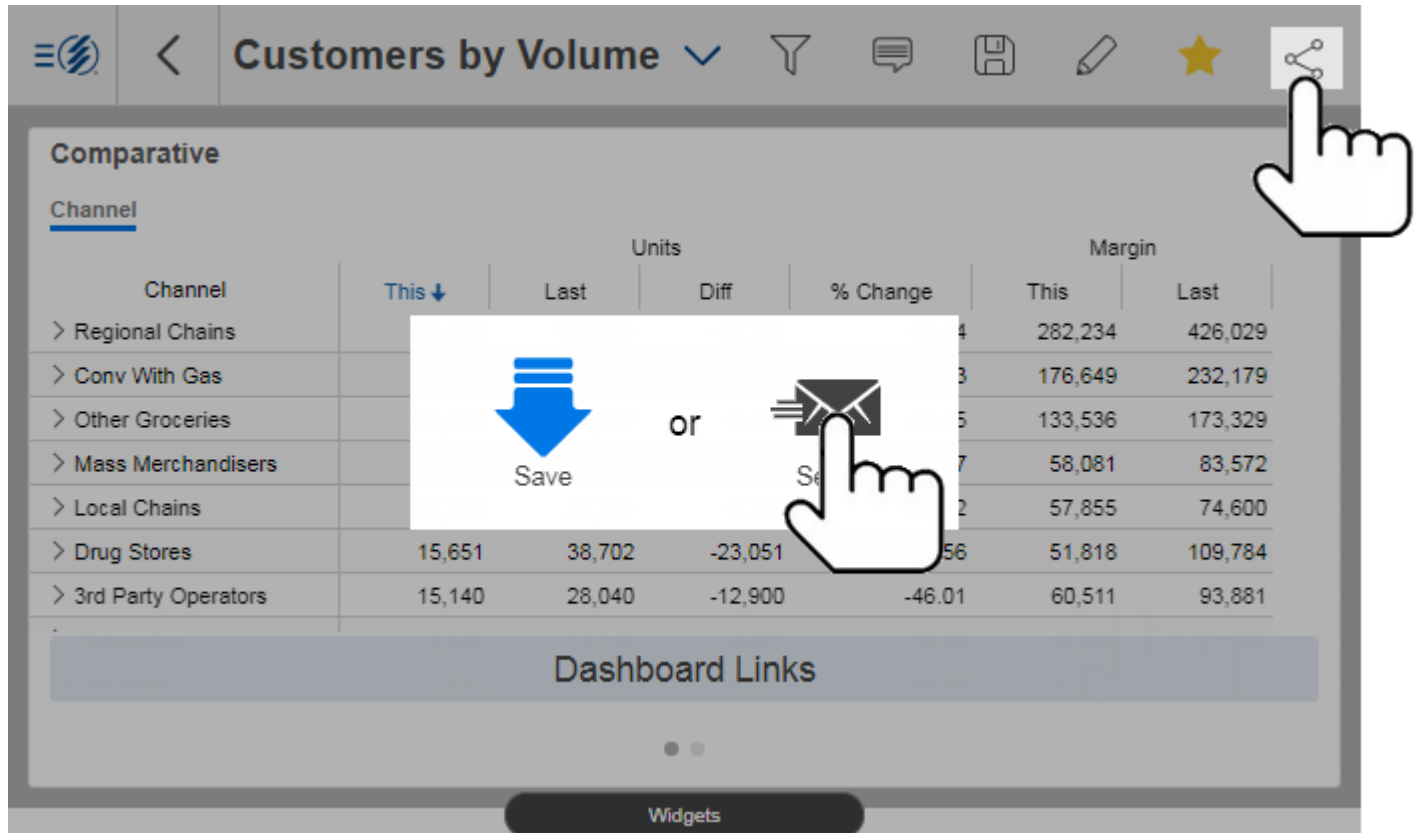
- To create a new folder, tap on **New Folder** at the bottom of the panel.
- On the home screen, touch and hold to delete or rename a dashboard or dashboard folder.



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.

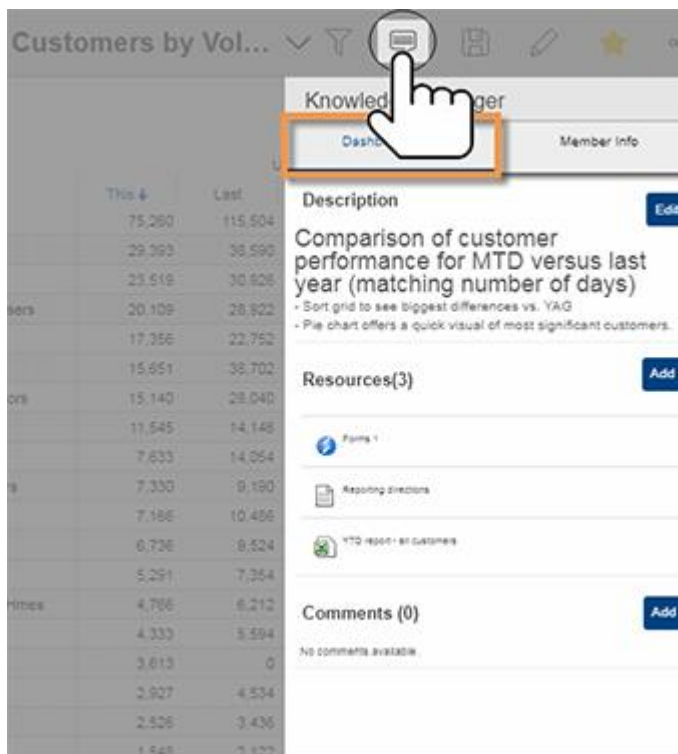


Knowledge Manager

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).

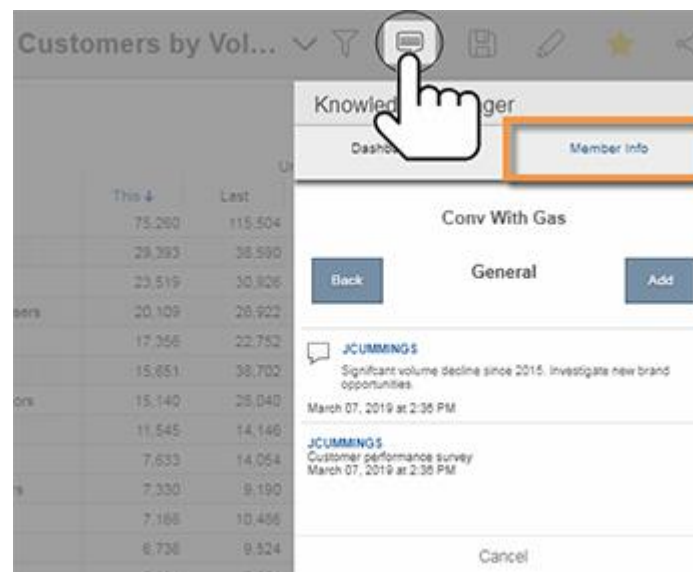
Dashboard Info

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



Member Info

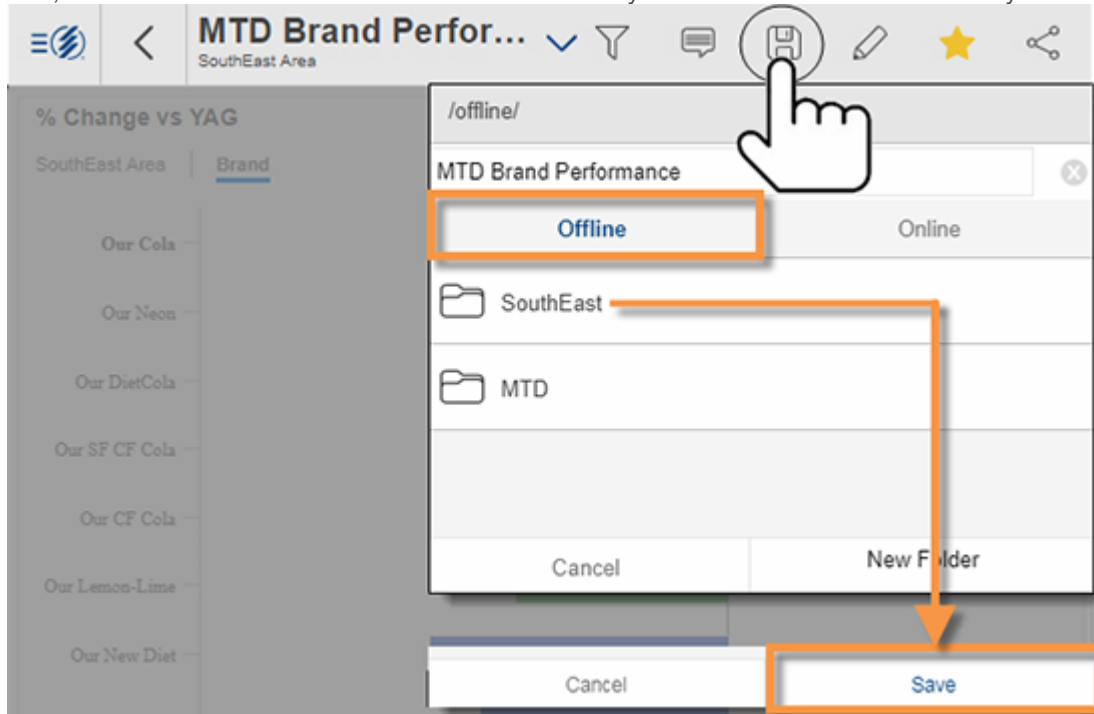
In the Member Info tab, you can add comments and resources to any selected member (e.g. customer, product, channel, brand, etc.)



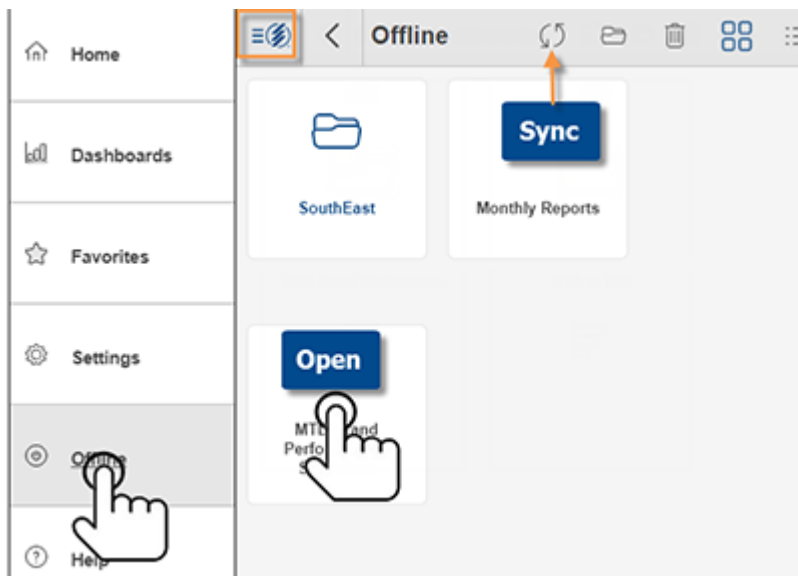
Offline mode

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.

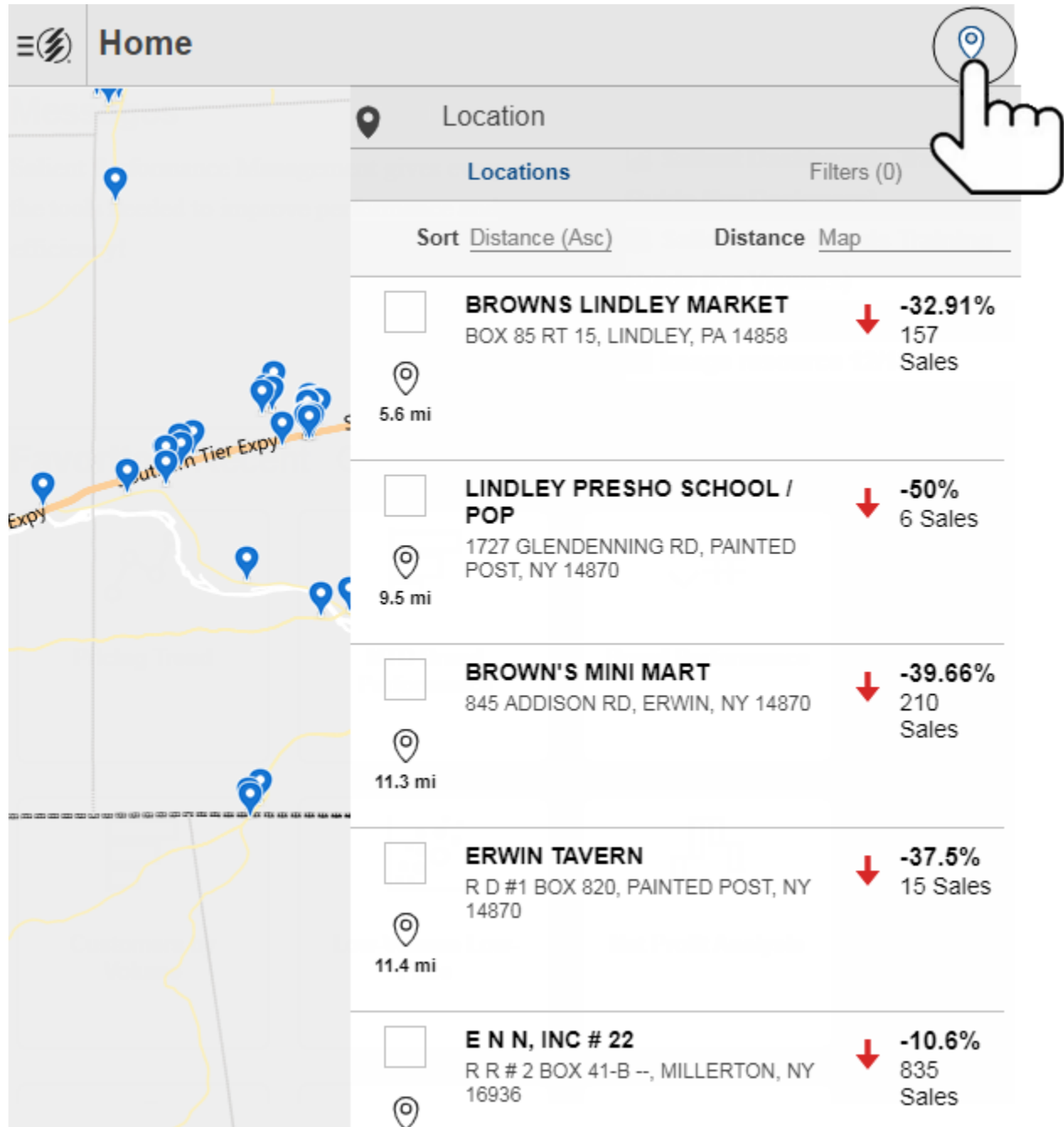


Then, go to offline mode to access the dashboard when you aren't connected. When you are back online, sync with the latest data.



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.

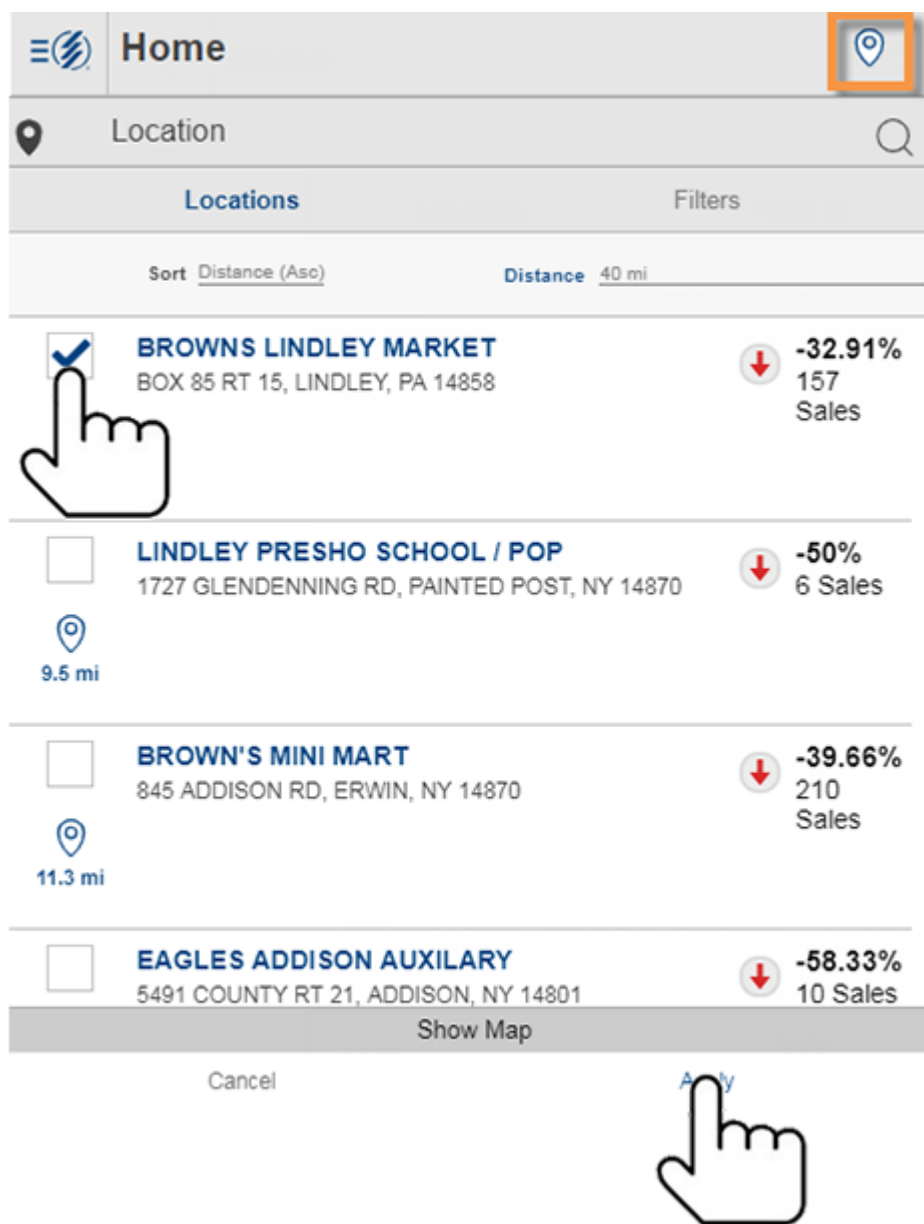


Location		
Locations		Filters (0)
Sort	Distance (Asc)	Distance Map
<input type="checkbox"/>	BROWNS LINDLEY MARKET BOX 85 RT 15, LINDLEY, PA 14858 5.6 mi	↓ -32.91% 157 Sales
<input type="checkbox"/>	LINDLEY PRESCHO SCHOOL / POP 1727 GLENDENNING RD, PAINTED POST, NY 14870 9.5 mi	↓ -50% 6 Sales
<input type="checkbox"/>	BROWN'S MINI MART 845 ADDISON RD, ERWIN, NY 14870 11.3 mi	↓ -39.66% 210 Sales
<input type="checkbox"/>	ERWIN TAVERN R D #1 BOX 820, PAINTED POST, NY 14870 11.4 mi	↓ -37.5% 15 Sales
<input type="checkbox"/>	E N N, INC # 22 R R # 2 BOX 41-B --, MILLERTON, NY 16936	↓ -10.6% 835 Sales

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.

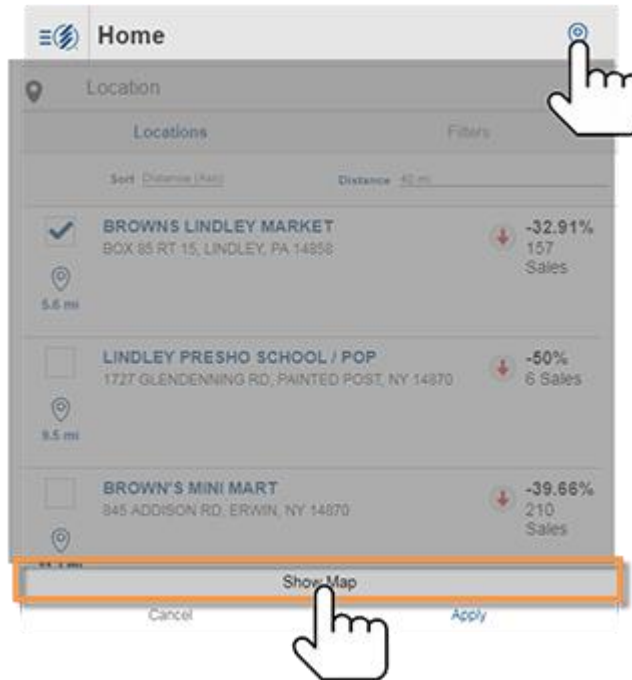


Location map

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

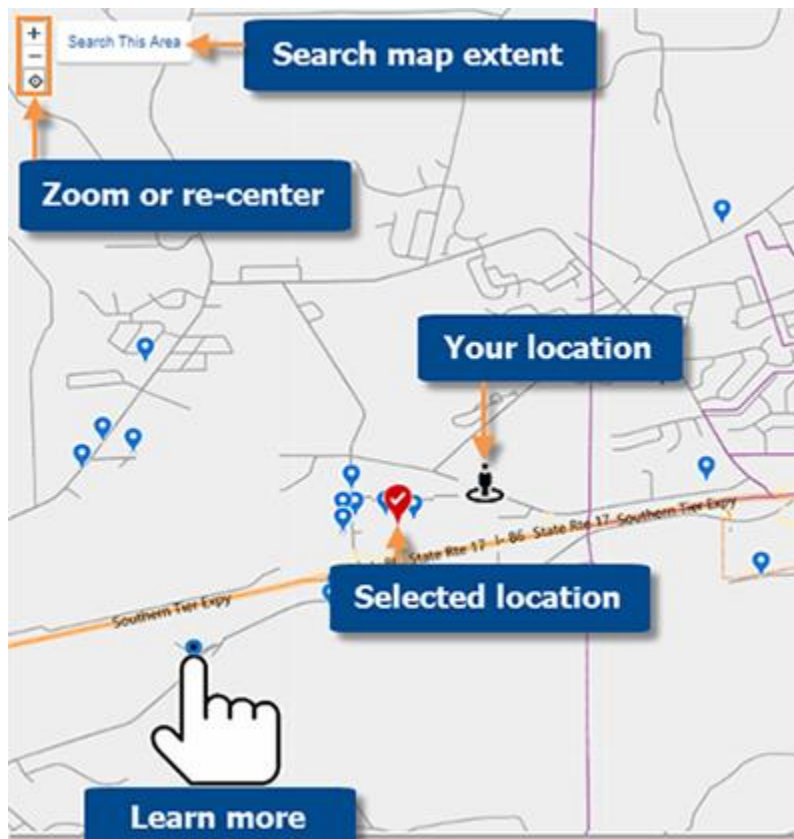
To open a map

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; re-run the search within any map extent.



Notifications

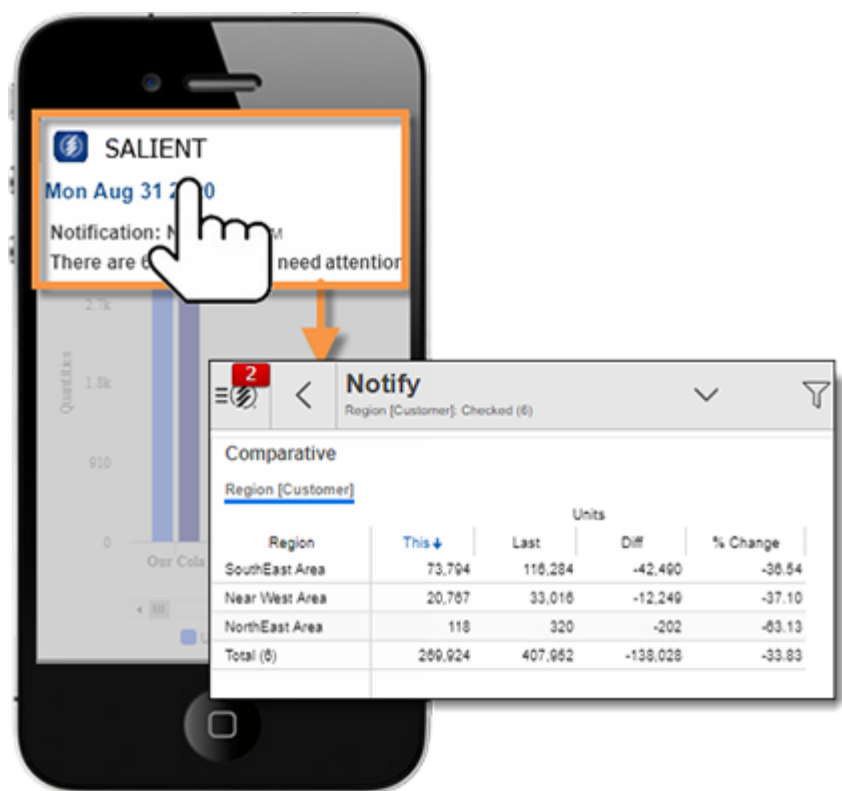
Your organization can set up custom notifications to alert you when something needs attention.

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

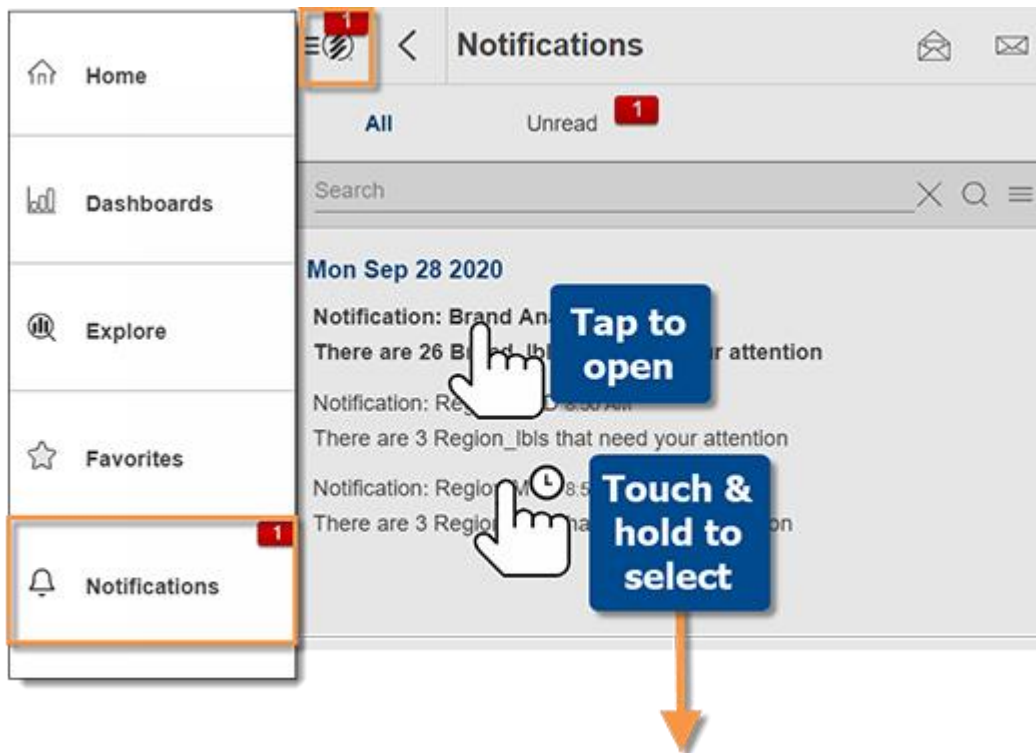
Get notifications

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).







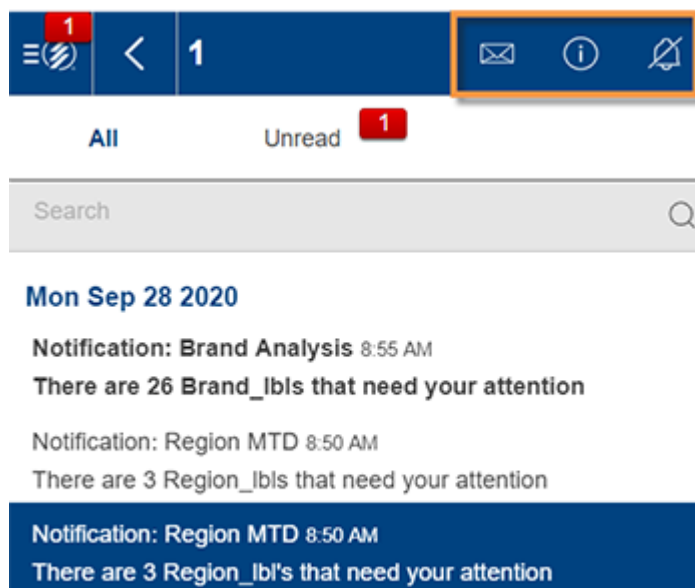
Manage notifications

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.



After selecting a notification(s), you can

-   - Mark it as unread/read.
-  - View information about it.
-  - Unsubscribe from it. (This cannot be undone.)

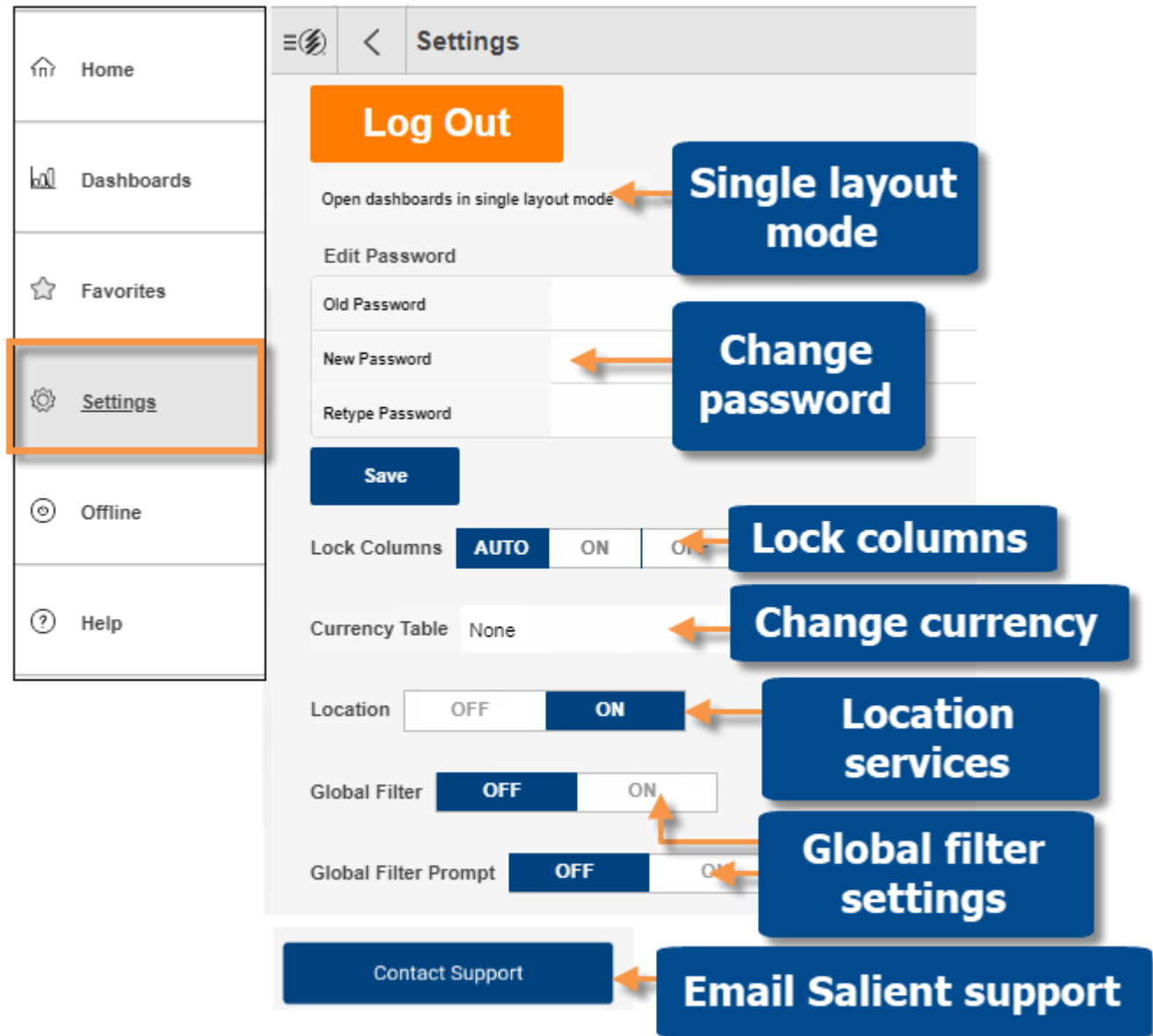


Tip: Notification rules and frequency are defined in the Salient Dashboards browser-based application.

Advanced

Settings

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



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, the following procedure may not be necessary 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.

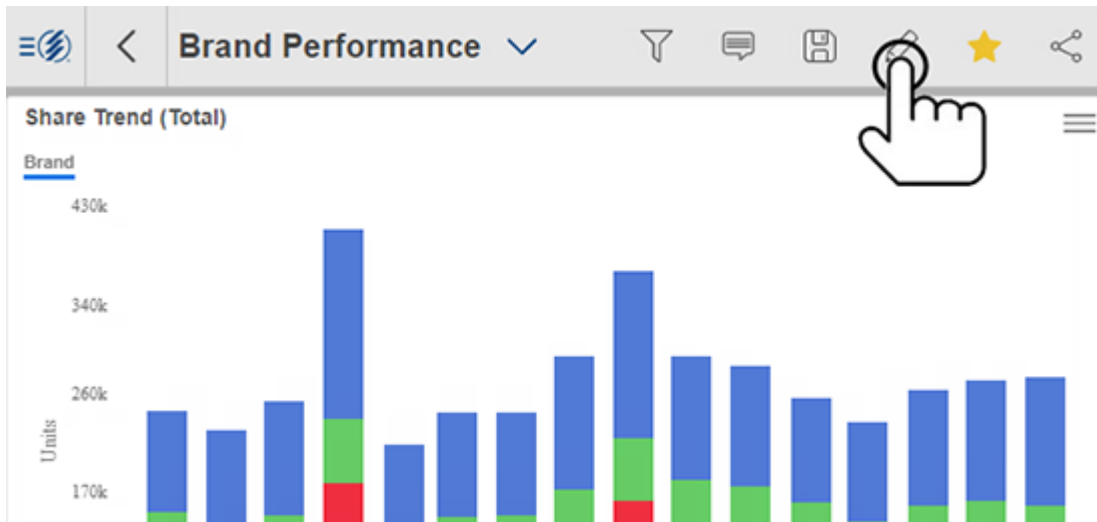
If a dashboard does not have either type of layout (designed in browser application or mobile app), the mobile app will display a single pane with additional widgets available via swipe.

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.)

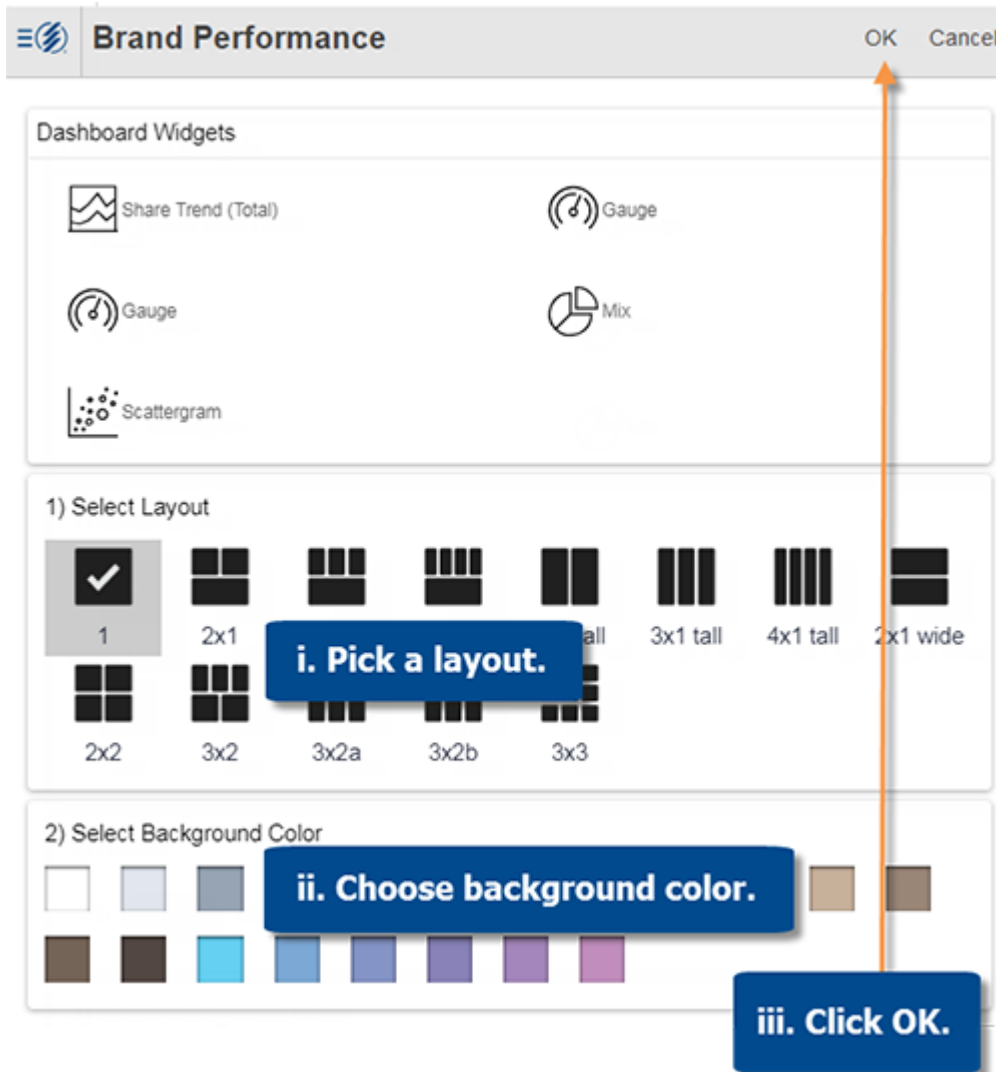
1. Open the dashboard and tap the edit button.



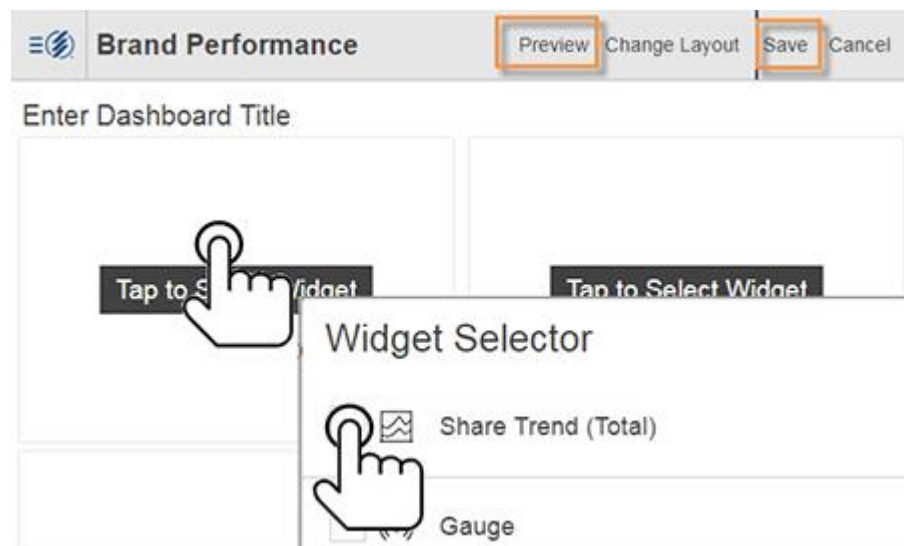
2. Tap on Change Layout to open the wizard.

The screenshot shows the 'Change Layout' wizard screen. The header bar contains the 'Brand Performance' title and four buttons: 'Preview', 'Change Layout', 'Save', and 'Cancel'. A hand icon is pointing at the 'Change Layout' button. Below the header, there is a text input field labeled 'Enter Dashboard Title'. Below the input field, there is a preview area showing a placeholder for the 'Share Trend (Total)' chart, represented by a small icon of a bar chart.

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.



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 67) or [select a specific location](#) (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.

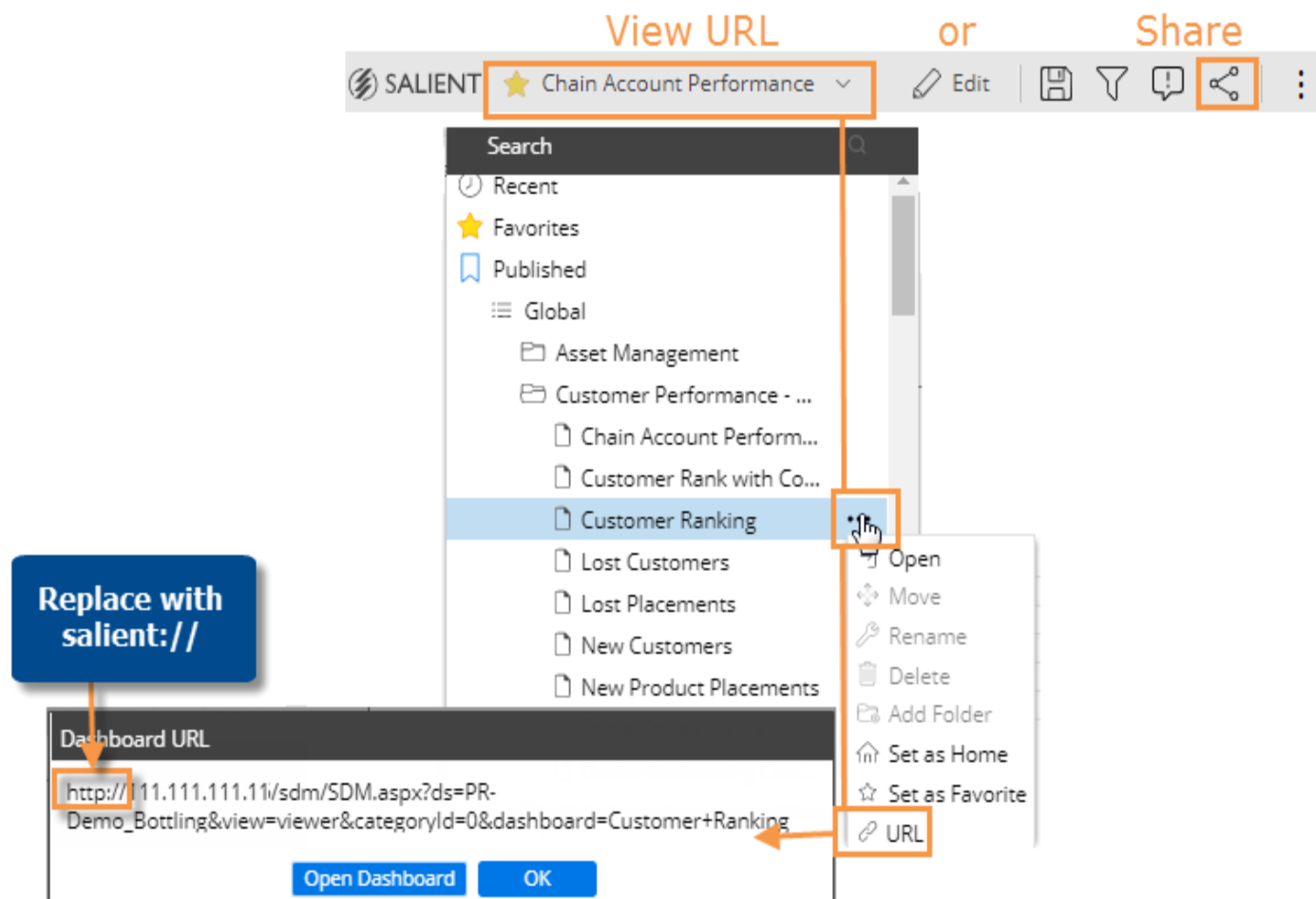


Option 2

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.



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 67).

Parameter	Explanation
locationSelectionHostCode & locationSelectionName	Refer to "Locations in mobile dashboard links" (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=Customer&filterValues=11901`

The resulting dashboard would be filtered by customer 11901.

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

The resulting dashboard would be filtered by customer region 01.

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

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

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

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

Locations in mobile dashboard links

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

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

To select a location via a dashboard URL

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

```
&locationSelectionHostCode=member_code
```

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

```
&locationSelectionName=display_name
```

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

Examples

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

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

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

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

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