

What's New in Salient Dashboards

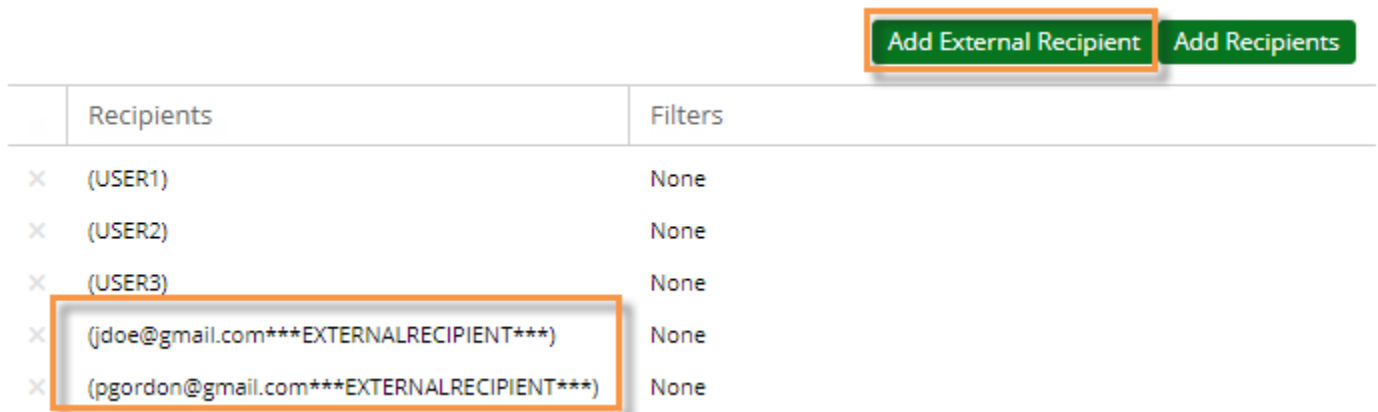
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Version 8.5

Notification enhancements (in 8.5.1+)

External recipients

Notifications can be sent to any email address, even if the recipient does not have a Salient account.



Recipients		Filters
×	(USER1)	None
×	(USER2)	None
×	(USER3)	None
×	(jdoe@gmail.com***EXTERNALRECIPIENT***)	None
×	(pgordon@gmail.com***EXTERNALRECIPIENT***)	None

Notes:

- Use caution when sending notifications that could contain sensitive information because external messages cannot be filtered based on individual user account rights.
- This capability is controlled by user group permissions. The default super user group has permission to add external recipients.

Multi Comparative notifications

You can send notifications based on Multi Comparative widgets to automate the reporting of multiple date ranges and/or subsets of data within a single message.

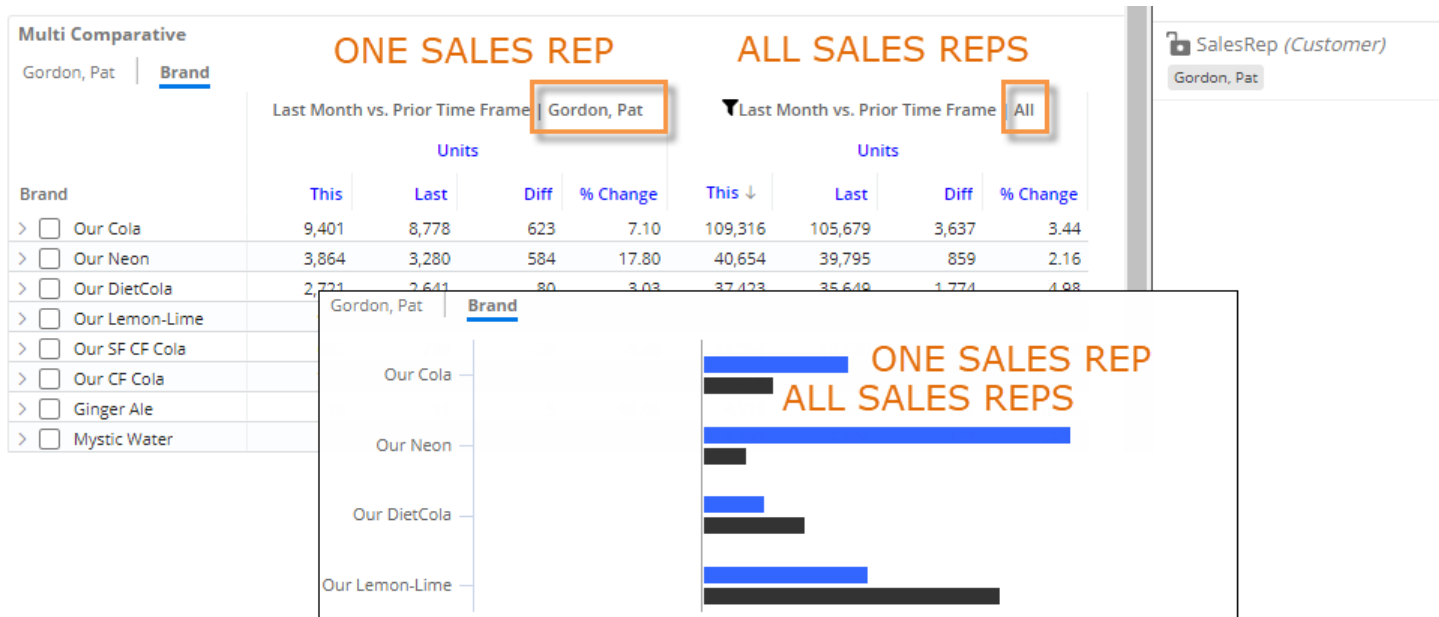
Dashboard Notification

Notification: Benchmark by sales rep

	Month To Date vs. YAG Gordon, Pat	Month To Date vs. YAG Gordon, Pat	Month To Date vs. YAG All Others	Month To Date vs. YAG All Others
	Units	Units	Units	Units
Package	This	Last	This	Last
12Pk Cn	11,350	16,330	64,788	106,304
2Ltr-8Pa	3,850	5,006	3,675	5,224
16PNR8Pa	2,490	2,784	2,105	2,616
20Oz Pa	2,291	2,774	1,286	1,912
6Pk Cn	1,127	1,794	39,412	68,028
1Ltr15Pa	462	584	331	476

"All" benchmarks (in 8.5.1+)

You can now compare performance of whatever is selected to the total (i.e., All) in benchmark widgets. For example, how is any sales rep doing compared with the total of all sales reps? This new feature adds to existing benchmark options, which include "All Others" and custom cohorts.



Simplified settings in explore mode (in 8.5.1+)

The following settings have been removed from the General Settings area of explore mode because they are related to dashboard design and management rather than data investigation: Hidden; Show in Mobile; Hide for Phone; and Enable Export.

Version 8.4

Notification improvements (in 8.4.7+)

Embedded data

You can embed notification data directly within a message to provide easy, automated access to data. The data is formatted like the grids in Salient Dashboards, including highlighting if it has been applied to the original dashboard. Several options are available to customize the notification. For example, show the entire grid or only totals/averages.

Dashboard Notification

	Units	Units	Units	Net Revenue	Net Revenue	Net Revenue
Brand	This	Diff	% Change	This	Diff	% Change
Our Cola	109,316	3,637	3.44	\$939,941	5,563	0.6
Our Neon	40,654	859	2.16	\$385,239	-6,107	-1.56
Our DietCola	37,423	1,774	4.98	\$325,829	5,568	1.74
Our Lemon-Lime	11,893	1,494	14.37	\$103,822	10,626	11.4
Our SF CF Cola	11,354	924	8.86	\$84,741	4,813	6.02
Our CF Cola	11,275	1,668	17.36	\$84,036	10,023	13.54
SF Our Lemom-Lime	3,118	-148	-4.53	\$23,452	-1,817	-7.19
Our New Diet	2,875	-474	-14.15	\$22,857	-3,645	-13.75
Our Punch	2,183	284	14.96	\$24,730	975	4.1
Our Cherry Cola	1,692	137	8.81	\$18,369	559	3.14
Our RootBeer	1,667	171	11.43	\$14,889	875	6.24
SF Our Neon	1,585	119	8.12	\$17,454	35	0.2
Our Orange	178	36	25.35	\$2,682	503	23.07
Our Punch	6	3	100	\$76	38	100
Total (14)	235,219	10,484	4.67	\$2,048,117	28,007	1.39

[Go To Dashboard](#)

Filter data by recipient

Recipient filters allow you to efficiently manage the distribution of relevant data to multiple users. You can use a single notification and apply filters based on user role or security level to create custom reports—reducing setup and maintenance time. For example, send each manager his or her own results using the same notification and dashboard. For each recipient, choose what to filter on. You can select members individually or apply collections.

	Recipients	Filters
×	(JBAIRD)	Customer.SalesRep: Baird, Jim
×	(LJOHNSON)	Customer.SalesRep: Johnson, Louise
×	(PGORDON)	Customer.SalesRep: Gordon, Pat

Graph difference between timeframes (in V8.4.7+)

You can visualize the difference between timeframes in more charts. Just pick the new "Difference" option on the widget menu.

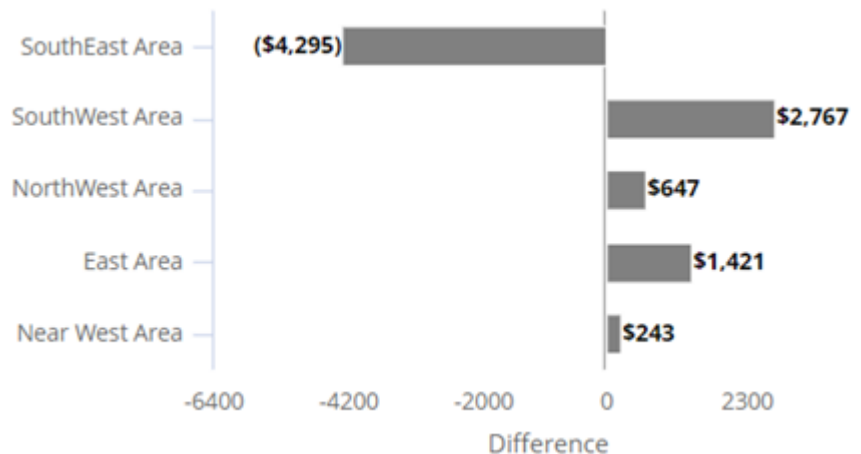
Gauge

A gauge can show the difference between two date ranges to provide a quick glance of how much a measure increased or decreased. For a budget measure, the gauge can show the difference between actual values and budgeted goals. As always, highlighting is available to spot changes that need attention.

-1,226
 This: 15,988
 Last: 17,214
 % Chg: -7.12%

Comparative/Multi Comparative

Comparative views provide visual comparisons of data groupings (e.g., regions) to show what increased or decreased the most.



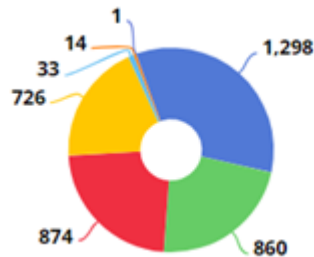
Trend/Comparative Time Series

A trend of two timeframes can show the difference between corresponding dates. For example, how much higher or lower were results than the same time last year?



Mix

A mix chart can show a breakdown of changes in data values.



Better sorting (in V8.4.7+)

Custom sorting options provide full control over how the data is ranked.

Additional sort levels

You can choose multiple sort levels to rank members that have the same values. For example:

Sort by sales for this period to see lost customers (sales of zero) at the top; choose sales for last period as a secondary sort to rank the lost customers.

Customer	CustName	Units			
		This ↑	Last	Diff	% Change
> <input type="checkbox"/> 03490	ONLY ONE DOLLAR	0	1,320	-1,320	-100.00
> <input type="checkbox"/> 09198	ROGANS NORTHEAST - DBA	0	676	-676	-100.00
> <input type="checkbox"/> 09612	SKYLINE RACEWAY	0	472	-472	-100.00
> <input type="checkbox"/> 05610	HORNELL WHOLESALE GROC CO	0	437	-437	-100.00
> <input type="checkbox"/> 02665	MOAKLEY HOUSE - CORNELL UNIV	0	369	-369	-100.00
> <input type="checkbox"/> 02992	DJ /GW	0	288	-288	-100.00
> <input type="checkbox"/> 11758	WAVERLY LITTLE LEAGUE AUX	0	269	-269	-100.00
> <input type="checkbox"/> 07216	MARK TWAIN LITTLE LEAGUE	0	256	-256	-100.00
> <input type="checkbox"/> 03053	CORNING NAT'L LT LG (MAJOR) DP	0	221	-221	-100.00

Group data in flat views by dimension and then rank results by data values.

Channel	Package	Brand	Units	Net Revenue	Net Price	Margin
Wholesale Clubs	6Pk Cn	Our Cola	323	209	0.65	100
Wholesale Clubs	6Pk Cn	Our DietCola	205	129	0.63	56
Wholesale Clubs	2Ltr-8	Our Cola	200	132	0.66	47
Wholesale Clubs	6Pk Cn	Our Neon	10	71	7.10	32
Wholesale Clubs	6Pk Cn	Our Lemon-Lime	5	5	1.02	3
Wholesale Clubs	6Pk Cn	Hires Root Beer	3	3	1.03	2
Video Stores	20Oz NR	Our Cola	54	78	1.44	52
Video Stores	20Oz NR	Our Neon	51	74	1.45	48
Video Stores	6Pk Cn	Our Cola	34	22	0.66	11
Video Stores	2Ltr-8Pa	Our Cola	32	24	0.74	10
Video Stores	6Pk Cn	Our Neon	18	14	0.76	7

Add as many levels as you wish. For each level, choose any measure or dimension and pick ascending or descending order.

Custom Sort

Channel

↓

↕

🗑️

Brand

↓

↕

🗑️

Units

↓

↕

🗑️

+ Add Sort

Apply

Cancel

Sort multiple ways in Crosstab

You can choose different sort methods for rows and columns in Crosstab widgets. For example, you might want to sort rows alphabetically by name and columns by sales units. (As in previous versions, the sort is based on total values.) This capability is available in the custom sort area.

Name	12Pk Cn		2Ltr-8		6Pk Cn		Units (This)
	Units		Units		Units		
	This	Last	This	Last	This	Last	
> <input type="checkbox"/> A Plus Marts	89	144	593	477	69	70	
> <input type="checkbox"/> Acorn Mkts	6	105	0	59	0	0	
> <input type="checkbox"/> All Others	7,845	6,800	8,188	7,493	24,375	18,228	
> <input type="checkbox"/> American Food & Vend	0	0	0	0	845	780	
> <input type="checkbox"/> Arrow Mart	220	115	160	295	20	7	
> <input type="checkbox"/> B. English-North	122	129	192	78	2	78	
> <input type="checkbox"/> B. English-South	0	134	0	0	0	0	

New mix (percent of total) calculations (in V8.4.7+)

You can add new mix calculations to see share of the market multiple ways in a Crosstab (two-way) grid.

- Column Mix (Mix - C) - shows percent of the total of all columns (e.g., one brand in a region over all brands in that region).
- Row Mix (Mix - R) - shows percent of the total of all rows (e.g., one brand in a region over that brand in all regions).
- Total Mix (Mix - T) - shows percent of the total of all rows and columns (e.g., one brand in a region over total sales).

	Mocha Coffee				Total	
	Units				Units	
	This	Mix - C (Units)	Mix - R (Units)	Mix - T (Units)	This	Mix (Units)
SouthEast Area	185	40.3	69.0	28.4	459	70.5
SouthWest Area	34	39.5	12.7	5.2	86	13.2
East Area	25	45.5	9.3	3.8	55	8.4
NorthWest Area	24	48.0	9.0	3.7	50	7.7
NorthEast Area	0	0.0	0.0	0.0	1	0.2
Total (5)	268	41.2	41.2	41.2	651	100.0

This new capability makes it easy to add calculations like: each brand/package combination as a percent of total sales, product sales percent within a category and store, mix of sales across top brands for each sales rep, much more.

Scatter plot for dimension-level data (in V8.4.7+)

You can plot dimension-level data on a Scattergram to find trends and outliers by attribute or grouping. For example, view sales representatives, accounts, geographic areas, packages, etc., to find correlations between any two measures. This new option supplements the key-level (e.g., customer) Scattergram available in previous versions.



More options for dynamic filters (in V8.4.7+)

You can apply more types of filters within a dynamic filter to control the data used in the test. Now you can create filters by selecting members, "excluding" members, and combining multiple filters together, in addition to using the collection-based filters that were previously available in this area. For example, apply a dynamic filter to narrow down on products that are new to one business channel, but not others.

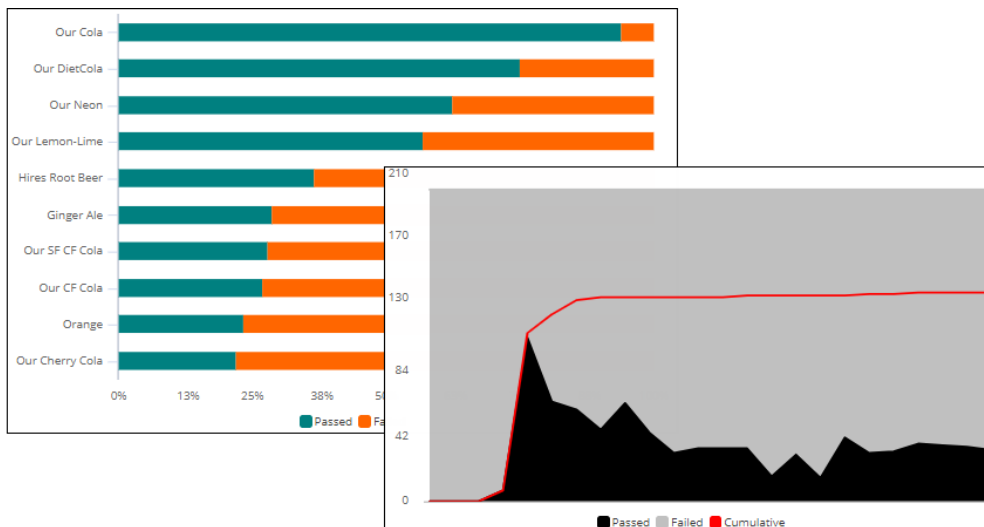
Improved sharing of dashboards with private collections (in V8.4.7+)

If you share dashboards that have private collections, the dashboards will preserve their filter information, including regular collections (i.e. saved sets of members) and test-based filters. Therefore, users who don't have rights to create global data can more easily share dashboards with other users in this version. Any private collections will be converted to regular (i.e., anonymous) filters. Any private dynamic filters will be saved and applied as test criteria. As a result, dashboard recipients will see the same data as the original user.

Exception enhancements (in V8.4.5+)

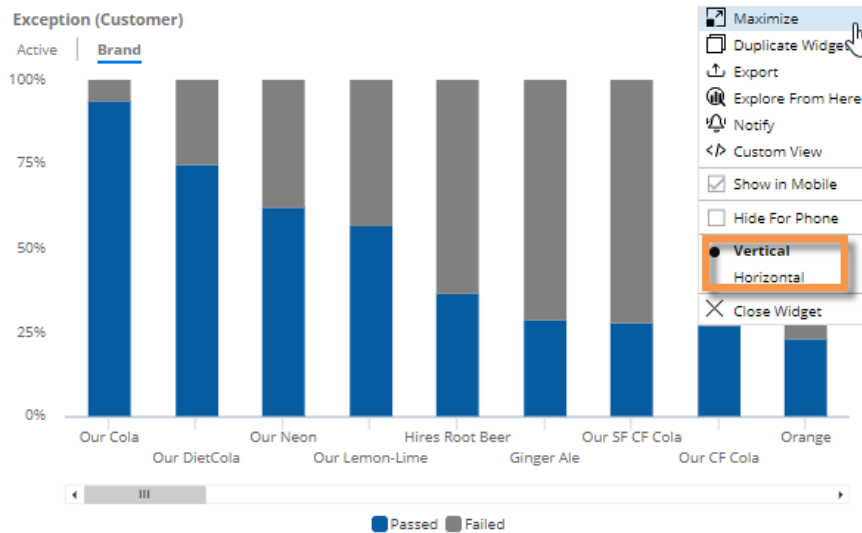
Custom graph colors

In visual options, you can pick custom colors to represent what passes and what fails.



Multiple bar graph formats

Choose horizontal or vertical bars in comparative exception graphs.



Simplified exception widgets

You can hide exception metrics to simplify the screen. For example, you could remove columns for passing customers if you are only interested in failing customers. After removing metrics, you can easily add them back using the measures tool.

↑ Channel	Totals	Failed		% Failed	
		This	Last	This	Last
<input type="checkbox"/> 3rd Party Operators	59	25	25	42.4	
<input type="checkbox"/> All Othr On Premise	1,122	1,053	1,047	93.9	
<input type="checkbox"/> Bars / Taverns	212	111	106	52.4	
<input type="checkbox"/> Beverage Centers	53	28	27	52.8	
<input type="checkbox"/> Churches	57	48	47	84.2	
<input type="checkbox"/> Clubs	115	60	55	52.2	
<input type="checkbox"/> Colleges	262	234	231	89.3	

☒ Totals
☐ Passed
☐ % Passed
☒ Failed
☒ % Failed
[Edit Measures](#)
[OK](#) [Cancel](#)

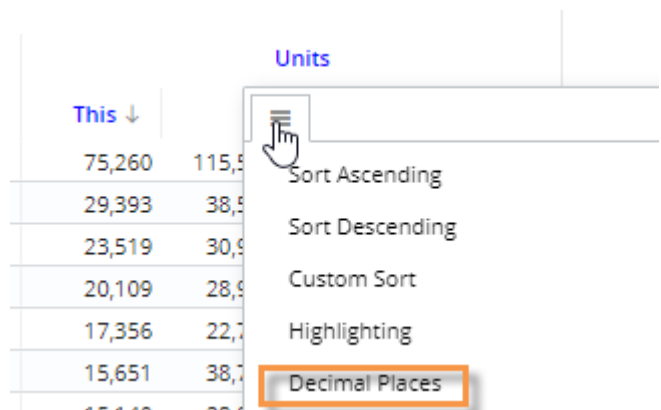
Improved test criteria

The exception test can use less than (<) or greater than (>) in addition to the options that were previously available (equal, not equal, less or equal, greater or equal, or range). For example, find customers who purchased something using a test of greater than zero to include decimal quantities less than 1.

The screenshot shows the 'Exception Test' configuration panel. It includes a dropdown for 'Accumulate By' set to 'Customer', two buttons for 'Single' (highlighted in blue) and 'Multiple', a dropdown for 'Data Type' set to 'Units', and a dropdown for 'Test Type' set to 'Value'. Below these are buttons for comparison operators: '=', '!=', '>' (highlighted in blue), '>=', '<', '<=', and 'Range'. At the bottom, there is a 'Value' input field containing the number '0'.

Custom precision (in V8.4.5+)

You can choose the number of decimal places to display for any measure in a widget. For example, show fractional amounts for quantities if the data supports it; display cents for currency data; choose a custom precision for percent change data. The selected number will override the precision defined in the dataset.



More access to data for Power Viewers

In this version, view mode allows Power Viewers to go beyond what was built into the dashboard. Power Viewers can add any measures, group data by any dimensions, or add any filters without switching to explore or edit mode. This enhancement includes the ability to access data in other cubes (i.e. activities or data sources). The user can make changes to investigate the data wherever it leads and then save the dashboard to share it or return to it later. These new options are available in all new and existing dashboards by default but can be turned off in dashboard settings if you wish to lock down a dashboard. The Measures area may also be restricted for a user group (requires Admin. Utility V8.5+). As always, comprehensive security options allow organizations to fine-tune data access even further.

The screenshot displays the Salient Dashboards interface in 'View' mode. The main dashboard shows a table with columns for 'Brand', 'Units', 'Net Revenue', and '% Change'. Several interactive elements are highlighted with orange boxes and arrows pointing to detailed panels:

- Brand:** A dropdown menu is open, showing a list of brands. The 'Edit Group By's' option is highlighted.
- Edit Measures:** A dialog box is open, allowing users to select measures to add to the dashboard. The 'Units' and 'Net Revenue' measures are selected.
- Filters:** A panel on the right side of the dashboard, showing a list of filters to apply to the data.
- Group By attributes/cubes:** A panel at the bottom left, showing a list of attributes and cubes to group the data by.
- Measures:** A panel at the bottom right, showing a list of measures to add to the dashboard.

The 'Group By' panel shows a list of available attributes and cubes, including 'Customer', 'Company', 'Region [Customer]', 'SalesRep', 'AssignedRoute', 'Channel', 'KeyAccount', 'ZipCode', and 'City'. The 'Measures' panel shows a list of available measures, including 'Avg Units/Buying Customer', 'DaysOnHand', 'MC Var Volume Cont', 'Promo', 'Promo %', 'Units', 'UnitsPerDay', 'Avg Revenue/Buying Customer', 'CMA %', and 'CMA's'.

Dynamic filters

This version introduces test-based filtering to easily isolate and analyze parts of the business. This capability is like dynamic collections (i.e., Of These) in Salient's desktop application (SIM). Now this type of filtering can be performed directly in Salient Dashboards. Choose what to test and set custom criteria, which can include a single rule or multiple rules joined into more complex business conditions. Example use cases include active customers, new customers, lost customers, at-risk customers, new placements, active or allowed products, same store sales, and much more. After filtering, analyze the data in any of the powerful charts and grids available in Salient Dashboards.

Filter on at-risk-customers.

positive sales in earlier time period

no sales in current time period (e.g., one month)

Analyze at-risk customers.

Where are they? What sales reps are responsible?

Region	SalesRep	Units		Net Revenue		Customer Count w/Sales Units	
		This	Last ↓	This	Last	This	Last
> Near West Area	TS-Kinser	0	3,418	0	24,020	0	3
> Near West Area	Office-Kinser	0	669	0	5,330	0	7
> East Area	Office-Haudenschild	0	370	0	2,289	0	1
> SouthWest Area	Stark, Solomon						
> Near West Area	Office-Lasoski						
> East Area	Gordon, Pat						
> SouthEast Area	Saxton, Tom						
> Near West Area	TS-Lasoski						
> NorthWest Area	Johnson, Lori						
> Near West Area	TS-Ferkel						
> NorthWest Area	Office-Kinse						
> Near West Area	Office-Ferke						
> Near West Area	Markey, Circ						
> Near West Area	Redmond, P						
Total (31)							

When did they stop buying?


Advanced options provide more customization options, such as date range options, additional filters, and equivalents.










After creating the filter, you can save the custom rules as a dynamic collection that can be reused and shared.

Column filtering in Multi Comparative

You can filter columns to compare results across any subsets of the data within a single widget—by building filters into individual columns or using interactive benchmarking options to compare whatever is selected to "all others" and custom cohorts. This new capability is available in the Multi Comparative analysis.



Individual column filters

Just click the column heading and choose how to filter the data: select from any available dimensions or keys, apply a saved set of members (i.e., collection), or turn on a dynamic filter based on test criteria. Filter any columns however you like to create customized views of performance; as in previous versions, add as many columns as you wish for a single measure or multiple measures. For example, compare performance across individual brands, packages, and custom groups of products in one view. A filter icon  indicates that a column is filtered.

	All Products		 Our Cola			 12 Pack Cans		 Our Carbonated Brands		 Products with Net Price > \$10	
	Units		Units			Units		Units		Units	
Channel	This ↓	% Change	This	Last	% Change	This	% Change	This	% Change	This	% Change
> <input type="checkbox"/> Regional Chains	87,307	18.54	35,909	29,847	20.31 	38,902	2.26	80,345	20.11 	5,365	-18.64
> <input type="checkbox"/> Conv With Gas	29,431	10.01	12,751	11,590	10.02	5,568	14.54	26,121	10.67	12,266	-6.59
> <input type="checkbox"/> Mass Merchandisers	23,893	-27.25 	10,975	15,990	-31.36 	15,290	-40.53 	23,059	-27.99 	1,798	2.98
> <input type="checkbox"/> Other Groceries	20,611	4.06	8,880	7,889	12.56	3,185	88.46 	17,308	8.88	7,557	-12.16
> <input type="checkbox"/> 3rd Party Operators	14,376	-8.29	5,523	5,951	-7.19	201	55.81 	12,165	-9.69	5,953	-16.47
> <input type="checkbox"/> Drug Stores	14,296	10.74	5,965	5,797	2.90	7,311	3.32	13,532	9.89	1,223	8.71
> <input type="checkbox"/> Local Chains	11,851	5.16	5,377	5,191	3.58	4,195	6.91	10,979	5.96	1,118	-18.45
> <input type="checkbox"/> Industrial	9,576	8.47	2,151	2,159	-0.37	1	-80.00 	5,241	4.78	2,215	6.70
> <input type="checkbox"/> Superettes	9,020	-7.84	3,681	4,215	-12.67	2,349	-25.31 	7,875	-10.14	1,551	-22.84 

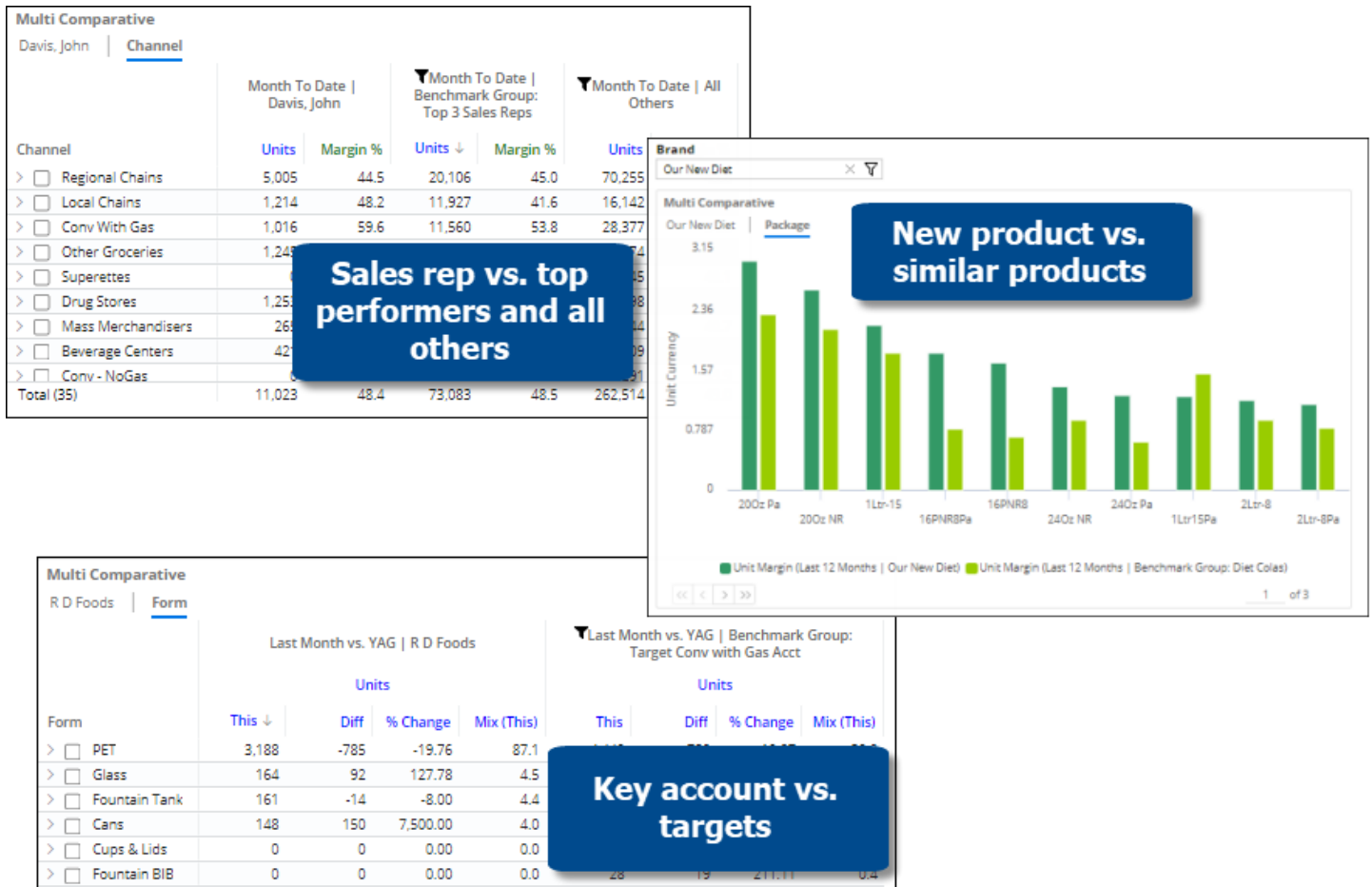
Dynamic benchmarking

Apply a dashboard filter and set up columns to compare performance against benchmarks, such as industry bests and standards. This method of column filtering allows users to select what they want to compare from a menu. For example, compare a single account to "all others" and/or a top-performing group of similar accounts (i.e. cohort). The columns update dynamically based on whatever filter is selected at the time (e.g., pick a different account). Your administrator can create custom cohorts for any part of the organization.

Multi Comparative									KeyAccount (Customer)	
R D Foods Form									R D Foods	
Last Month vs. YAG  R D Foods					 Last Month vs. YAG Benchmark Group: Target Conv with Gas Acct					
Units					Units					
Form	This ↓	Diff	% Change	Mix (This)	This	Diff	% Change	Mix (This)		
> <input type="checkbox"/> PET	3,188	-785	-19.76	87.1	4,440	739	19.97	59.9		
> <input type="checkbox"/> Glass	164	92	127.78	4.5	226	55	32.16	3.0		
> <input type="checkbox"/> Fountain Tank	161	-14	-8.00	4.4	10	15	300.00	0.1		
> <input type="checkbox"/> Cans	148	150	7,500.00	4.0	2,659	-1,314	-33.07	35.9		
> <input type="checkbox"/> Cups & Lids	0	0	0.00	0.0	48	48	100.00	0.6		
> <input type="checkbox"/> Fountain BIB	0	0	0.00	0.0	28	19	211.11	0.4		

Example uses:

- Compare any sales rep to all others—are they doing better or worse than average?
- Compare margin, price, etc., for a new product to similar products.
- Investigate any account—how does product mix compare to top-performing accounts; what metrics are better or worse than average?



This feature works with password collections to provide automatic comparisons of user-assigned data to benchmarks. For example, how am I doing compared to everyone else? The same dashboard can be used across multiple users with different results depending on user rights. Additional setup is required to use benchmarking with password collections.

Custom column headers

You can customize column headers to help users understand what date ranges and filters they are viewing. "Auto" options are available to automatically update the headings based on the context of the data.

Month To Date vs. YAG SouthEast Area		Month To Date vs. YAG All Others	
Units		Units	
This ↓	Last	This	Last
22,726	38,208	52,534	77,296
9,322	18,416	5,818	9,624
8,101	10,780	21,292	27,810

Customize Header

Date Options
☒ Auto
 ☐ User Defined

Filter Options
☐ None
 ☒ Auto

Region X X v

☐ User Defined
 ☐ Prepend Key/Dim Name

Delimiter

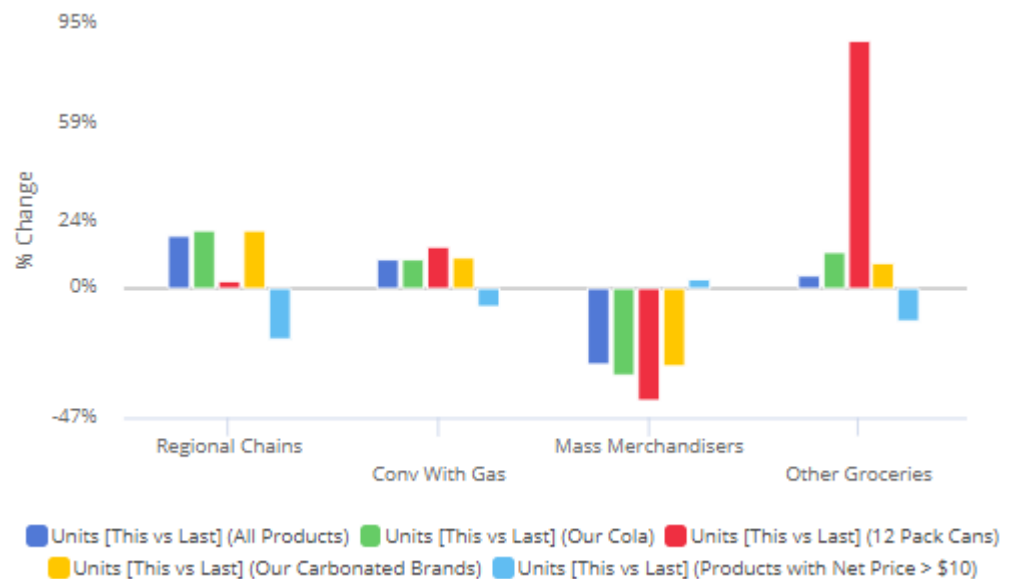
Pipe v

OK

Cancel

Column filtering in graphs

The filtered data is also available in graph format for both column filtering methods (e.g., percent change across different groups of products).



Equivalents by column

Equivalent units can be applied to individual columns to meaningfully express results. For example, display volume in terms of cases, 24 12-ounces, 24 16-ounces, and 24 8-ounces within one widget. This capability is part of the new Multi Comparative filtering feature.

Brand	Month To Date vs. YAG - Cases		Month To Date vs. YAG - 24/12 oz.		Month To Date vs. YAG - 24/16 oz.		Month To Date vs. YAG - 24/8 oz.	
	Units		Units		Units		Units	
	This ↓	Last	This	Last	This	Last	This	Last
> <input type="checkbox"/> Our Cola	116,095	171,296	180,399.34	259,788.03	137,005.26	197,191.12	274,010.52	394,382.25
> <input type="checkbox"/> Our Neon	39,995	59,002	62,020.18	88,894.18	47,583.90	68,032.14	95,167.80	136,064.29
> <input type="checkbox"/> Our DietCola	35,916	55,592	56,321.80	83,693.04	42,781.82	63,478.67	85,563.65	126,957.35
> <input type="checkbox"/> Our SF CF Cola	11,578	18,002	14,934.32	22,743.62	11,241.24	17,113.72	22,482.48	34,227.43
> <input type="checkbox"/> Our CF Cola	11,465	17,812	15,060.94	22,891.49	11,344.21	17,231.62	22,688.41	34,463.23
> <input type="checkbox"/> Our Lemon-Lime	9,519	14,034	16,961.39	24,215.24	12,931.99	18,435.72	25,863.98	36,871.45
> <input type="checkbox"/> Our New Diet	6,681	10,626	8,775.05	13,546.66	6,636.12	10,228.54	13,272.25	20,457.08
> <input type="checkbox"/> Ginger Ale	3,754	5,390	6,783.67	9,592.58	5,087.75	7,194.43	10,175.50	14,388.86
> <input type="checkbox"/> Vernors	3,090	4,208	427.99	584.56	322.99	441.42	645.98	882.83
> <input type="checkbox"/> Hires Root Beer	3,077	4,396	5,421.77	7,389.93	4,099.82	5,586.45	8,199.65	11,172.90
Total (78)	273,537	407,952	409,923.66	595,451.65	311,442.78	451,819.11	622,644.57	903,638.23

Custom calculations for columns

You can apply special calculations based on columns, such as difference in volume for one sales rep compared to another or number of customers buying one package versus all other packages. This feature requires that the dataset has temporal measures (i.e. measures based on specific timeframes) that can be overridden to show the desired information.

Multi Comparative

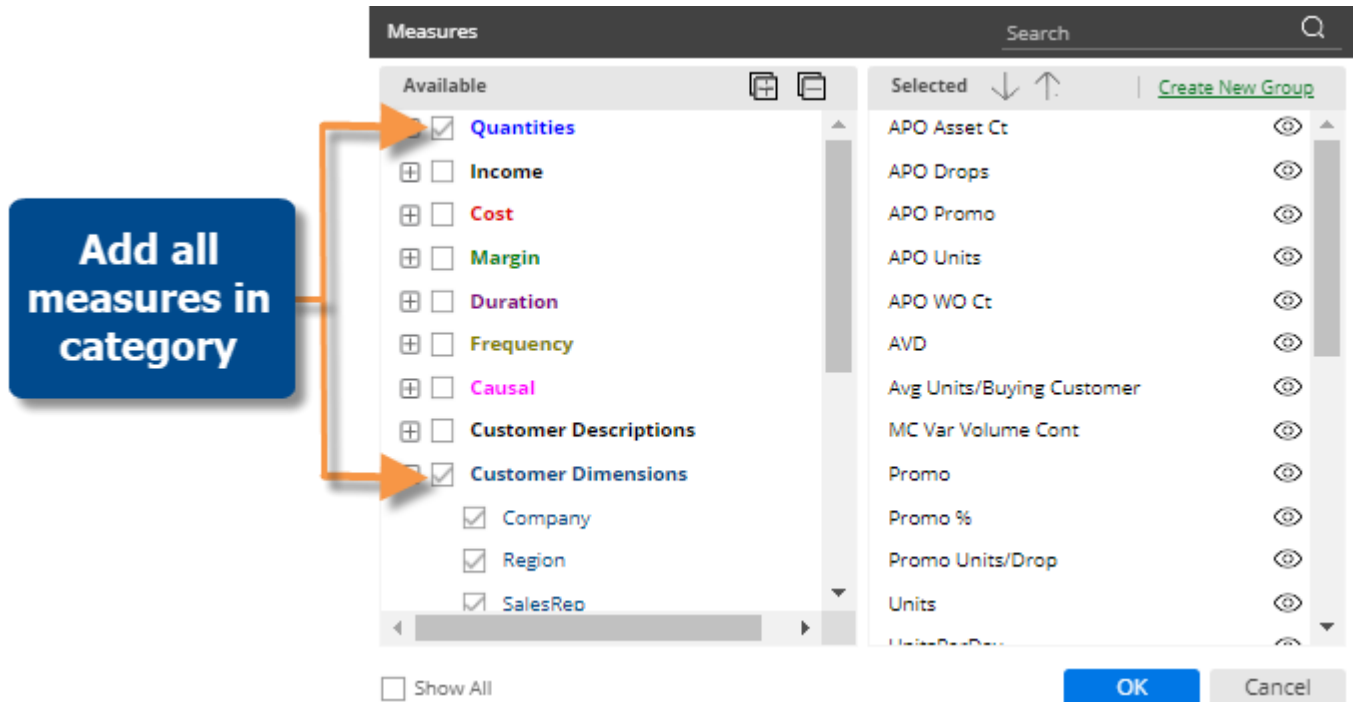
Our New Diet | Channel

Channel	Month To Date Our New Diet	Month To Date All Others	Month To Date All Others vs. Selected Brand
	Buying Customers ↓	Buying Customers	Difference
<input type="checkbox"/> Conv With Gas	87	141	54
<input type="checkbox"/> Other Groceries	68	150	82
<input type="checkbox"/> Drug Stores	40	52	12
<input type="checkbox"/> Regional Chains	32	34	2
<input type="checkbox"/> Mass Merchandisers	18	19	1
<input type="checkbox"/> Superettes	18	22	4
<input type="checkbox"/> Conv - NoGas	16	23	7
<input type="checkbox"/> Industrial	11	196	185
<input type="checkbox"/> Beverage Centers	10	24	14
Total (33)	369	2,064	1,695

Improved usability

Shortcut to add all measures

Add all measures in a category with a single click. This new feature also works with descriptions and dimensions in lists (e.g., customer or product lists) to quickly show all available information.



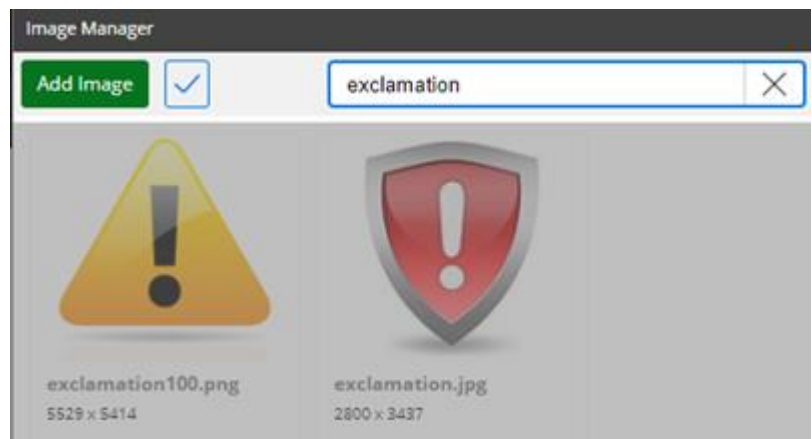
Cross-platform dashboard links

On a mobile device, a standard dashboard URL (i.e., http:// or https:// prefix) will take you to a landing page where you can choose to open the dashboard in the mobile app or a web browser. You can also choose your preferred method for future dashboard links. This enhancement makes it easier to view and share dashboards across different devices. Mobile dashboard links (i.e., salient:// prefix) open directly in the mobile app like in previous versions.

Easier image management

The image manager has new controls that allow you to search for an image and select multiple images.

In addition, administrators can manage images in the Admin Portal.



Grid access in custom views

In custom visualizations, you can switch to grid mode to see the underlying numbers.

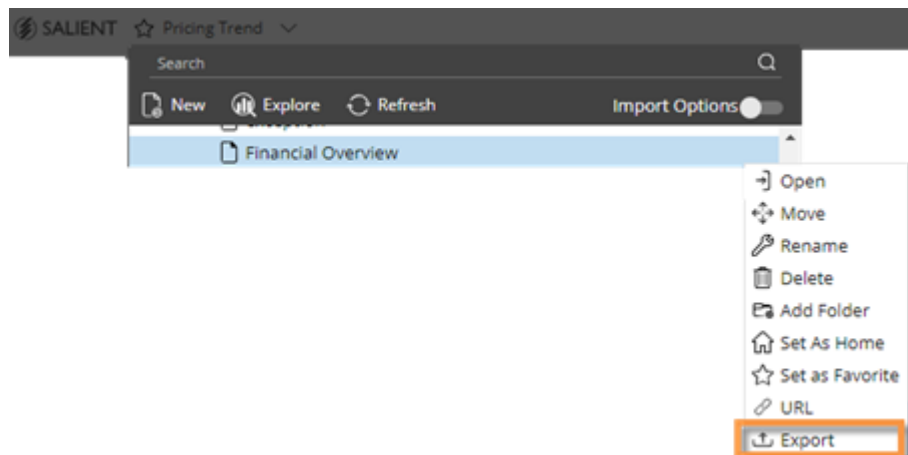
Administrative improvements

The Admin Portal includes more settings to provide easier configuration and management of datasets. For example, add custom color palettes, edit and create date presets, change the portal dashboard or default dashboard for exploring, and more. In addition, an administrator can add and edit server settings, including the display name, language, configuration file names, etc., when the Admin Portal is accessed on the Salient Dashboards machine (i.e., localhost). See the *Salient Dashboards Installation and Configuration Manual* for more information.

Version 8.3

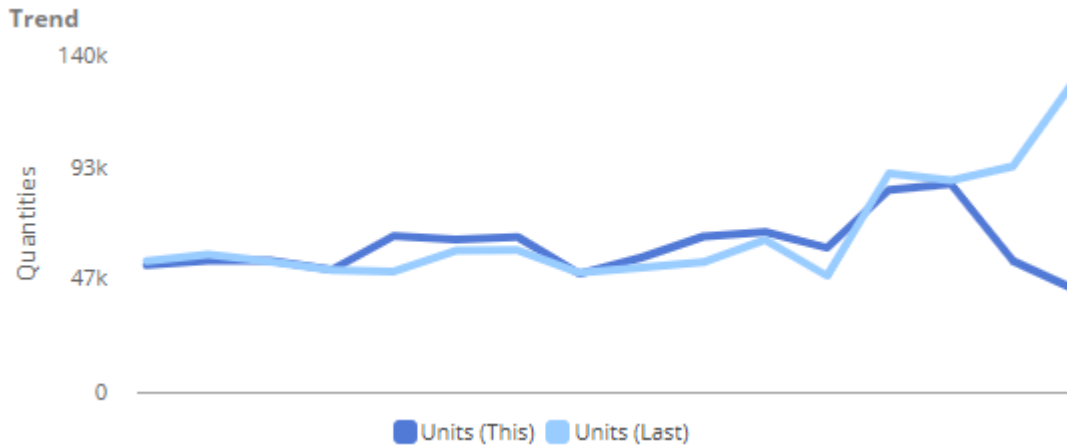
Faster dashboard export (in V8.3.6+)

You can export a dashboard to a file without opening it first. This new option is available in the dashboard menu.



Easier setup for comparative trend graphs (in V8.3.6+)

A Trend graph that has two date ranges (This and Last) will automatically show both timeframes. As always, you can choose your preferred timeframe option (This and Last, This only, or Last only) in the widget menu.



Shortcut to select multiple rows (in V8.3.4+)

Press Shift as you click in a grid to quickly checkmark a block of data containing multiple rows. You can then view subtotals for the selected rows or investigate the members by drilling down, filtering on them, or graphing them.

Product	ProductDescription	Units ↓	Net Revenue	Net Price	Margin
> <input checked="" type="checkbox"/> 0101	12PK CN Our Cola	593,007	1,599,440	2.70	656,752
> <input checked="" type="checkbox"/> 0701	Cans Our Cola	285,562	942,705	3.30	523,828
> <input checked="" type="checkbox"/> 5701	2LTR-8 Our Cola	235,723	951,548	4.04	414,939
> <input checked="" type="checkbox"/> 0102	12PK CN Our DietCola	181,051	494,612	2.73	190,045
> <input checked="" type="checkbox"/> 0104	12PK CN Our Neon	176,545	451,935	2.56	176,790
> <input checked="" type="checkbox"/> 2001	20OZ NR Our Cola	160,045	979,502	6.12	638,099
> <input checked="" type="checkbox"/> 5901	16PNR8 Our Cola	122,731	419,752	3.42	179,641
> <input checked="" type="checkbox"/> 0702	Cans Our DietCola	120,283	421,212	3.50	229,962
> <input checked="" type="checkbox"/> 2004	20OZ NR Our Neon	116,400	700,275	6.09	448,275
> <input checked="" type="checkbox"/> 0704	Cans Our Neon	101,013	341,013	3.41	208,106
> <input type="checkbox"/> 0115	12PK CN Our CF	87,538	283,400	2.83	87,538
> <input type="checkbox"/> 0116	12PK CN Our SF	78,588	278,320	2.78	78,588
> <input type="checkbox"/> 5702	2LTR-8 Our DietCola	69,849	284,253	4.07	115,664
Checked (10)		2,105,458	7,358,995	3.50	3,666,437
Unchecked (3)		2,257,295	9,675,296	4.29	4,410,818
Total (350)		4,362,753	17,034,290	3.90	8,077,255

Comprehensive options for notifications (in V8.3.4+)

Several new options provide a complete solution for automated notifications.

- *Better automated reporting* - Notifications no longer require conditions; therefore, they can be used for automated reporting that doesn't depend on test criteria. For example, send data reports every day, week, month, or whenever you wish. As always, the data is based on your preferred widget and can be completely customized.
- *Excel and PDF* - Attach Excel spreadsheets and/or PDFs to email notifications. This new feature makes data portable for access from anywhere without needing to log in to Salient Dashboards.
- *Templates* - Your organization can create multiple HTML templates to customize the appearance of email notifications. You can then select the template you wish to use during notification setup. Templates can include custom content as well as design elements such as logos and colors.
- *Improved flexibility* - Optionally, create different messages for mobile and email.
- *Rich text editor* - A rich text editor provides more formatting options for email messages.
- *Quick expressions* - Just point and click to insert any of several variables, such as the dashboard URL, mobile URL, dashboard name, number of members, or a list of members, into the message.

The screenshot shows the 'Create/Edit Notify Rules' interface with several annotations highlighting new features:

- Turn on/off conditions:** A blue callout box with an arrow pointing to the 'Conditions' toggle switch.
- Quick expressions:** A blue callout box with an arrow pointing to the 'Add Quick Expression' list on the left, which includes variables like `{{dashboardName}}`, `{{dashboardUrl}}`, `{{dashboardMobileUrl}}`, `{{widgetTitle}}`, `{{firstByKey}}`, `{{firstByDimension}}`, `{{numMatches}}`, and `{{matchedMembers}}`.
- Template selection:** A blue callout box with an arrow pointing to the 'Template' dropdown menu, which currently shows 'Report 1'.
- Rich text editor:** A blue callout box with an arrow pointing to the rich text editor area, which includes a toolbar and the text 'This report includes {{numMatches}} {{firstByDimension}}'.
- XLSX and PDF attachments:** A blue callout box with an arrow pointing to the checkboxes for 'Email data export (.xlsx)' and 'Email PDF of dashboard'.

The interface also includes fields for Name (Package comparison), Category (Global), Currency Table (None), Basic by Channel (Comparative - Month To Date vs. YAG), Frequency (Monthly - First Work Day (8:30 am)), Start (08/04/2022), End, Delivery Method (Email), and a list of recipients.

More control over mobile dashboard layouts (in V8.3.4+)

Mobile dashboard layouts can automatically show or hide widgets based on device size. This new setting provides better control over screen space in the mobile app. For example, a dashboard could show a large graph on tablets but hide it on phones.



New share trend visualization (in V8.3.4+)

An unstacked bar graph shows performance of multiple people, places, or things over time. The bars are arranged beside each other rather than stacked to provide a direct comparison of values. As always, you can customize the graph by choosing how many items display, a color palette, actual value or percent, and more.

58k

47k

35k

23k

12k

0

04/2021

06/2021

08/1998

10/2021

12/2021

02/2022

04/2022

06/2022

07/2022

■ Our DietCola ■ Our SF CF Cola ■ Our New Diet

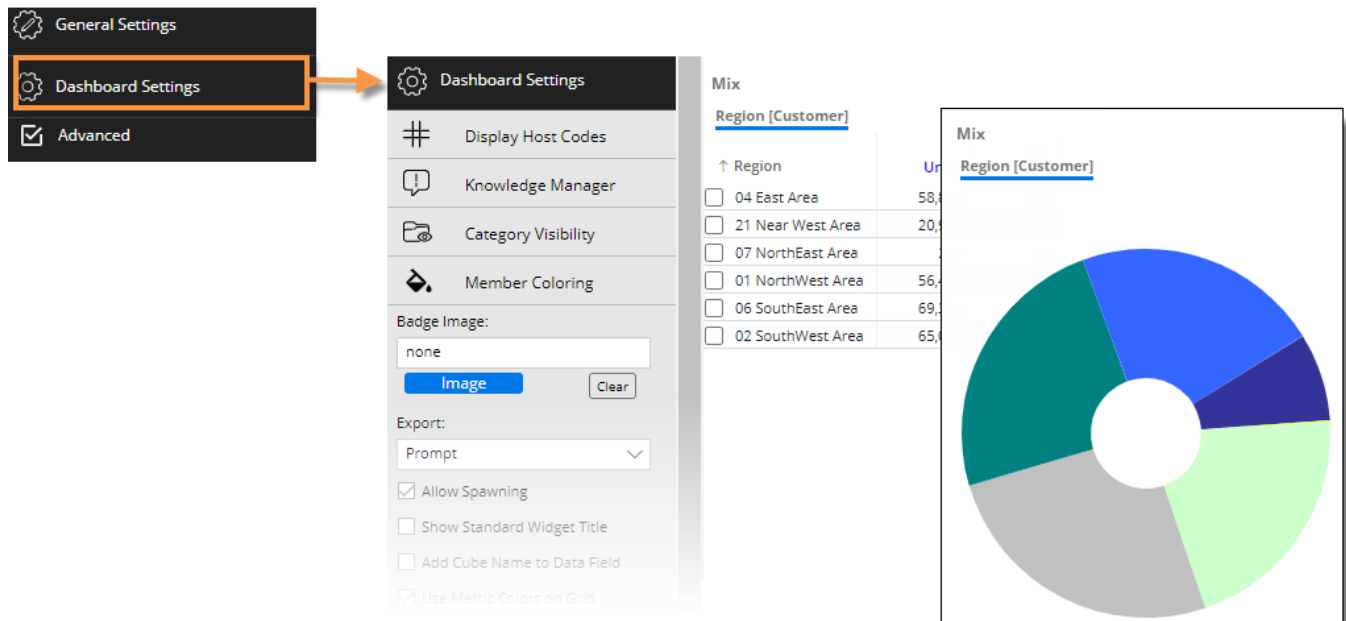
Explore mode enhancements

Fewer clicks needed to explore (in V8.3.4+)

Opening or importing an “explore” dashboard (i.e., saved or exported from explore mode) will take you directly to explore mode where you can make changes like adding measures or changing the analysis type. In previous versions, these dashboards opened in view mode.

More options while exploring

Dashboard settings are now available in explore mode to provide more ways to customize the dashboard. For example, a user might turn on host codes or apply custom colors to a graph. Other dashboard settings include options for Knowledge Manager, exporting, widget title information, and more.



Grid improvements

- This version provides better performance in large grids with many columns.
- Grids have an updated appearance. For example, expand multiple levels of data using streamlined arrows instead of plus buttons.
- A new option provides endless scrolling within a single page. When infinite scrolling is on, users can simply scroll down to see more members; data continuously loads to provide a seamless viewing experience. (Infinite scrolling is not available if auto-expand is on.)
- After resizing a column, you can save your changes in the dashboard if you want to keep a custom column width. To change the column width back the default (e.g., autosize), just select the reset option from the menu.

Region	Units				Customer Count w/Sales Units			
	This ↓	Last	Diff	% Change	This	Last	Diff	% Change
<input checked="" type="checkbox"/> SouthEast Area	69,324	64,719	4,605	7.12	411	433	-22	
> Saxton, Tom	16,831	16,433	398	2.42	93	94	-1	
> [Name]	16,013	17,052	-1,039	-6.09	78	85	-7	
> [Name]	13,229	9,872	3,357	34.01	9	9	0	
> [Name]	10,431	9,610	821	8.54	7	6	1	
> Office-Lasoski	8,518	6,909	1,609	23.29	40	42	-2	
> TS-Lasoski	3,278	3,544	-266	-7.51	126	137	-11	
> Andrews, Greg	974	1,213	-239	-19.70	55	56	-1	-1.79
> Special Event	29	42	-13	-30.95	2	3	-1	-33.33
> Hastings, Allyson	21	44	-23	-52.27	1	1	0	0
SalesRep - 9 of 9								
> <input type="checkbox"/> SouthWest Area	65,067	60,886	4,181	6.87	369	369	9	2.44
> <input type="checkbox"/> East Area	58,896	55,051	3,845	6.99	261	261	-11	-4.21
> <input type="checkbox"/> NorthWest Area	56,410	50,748	5,662	11.18	317	317	-6	-1.89

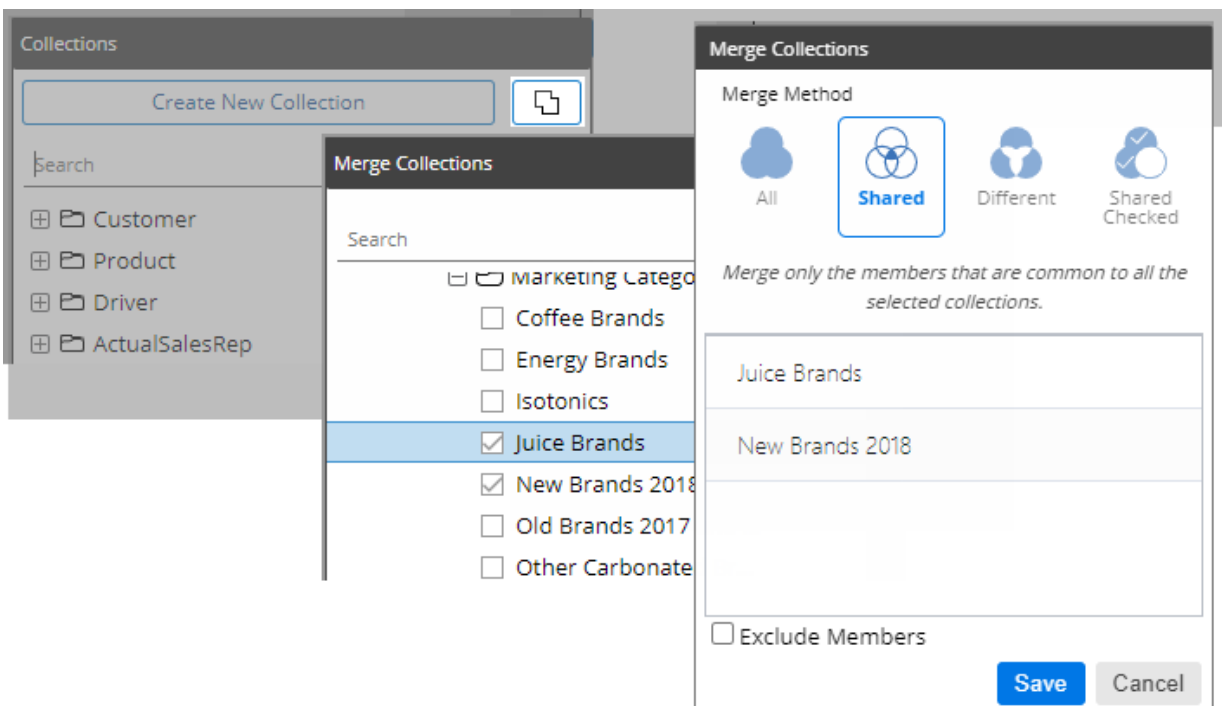
Updated appearance

Save and reset column widths

Endless scrolling

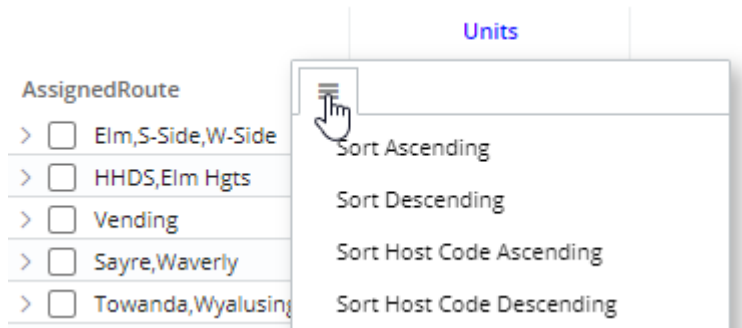
Merge collections

You can merge multiple collections together into new collections to facilitate creation and maintenance of custom filters. For example, merge multiple categories of brands together into a single collection. This new capability has several options to provide full control over which members are included in the new collection: merge all members, only common or "shared" members, only unique or "different" members, or members that belong to some collections but not others.



Sort by code or name

You can sort data by names or codes of dimension members (i.e., groupings) even if host codes are not currently displayed. Just click the column header and choose your preferred method of sorting.



Information about exported files

An exported file header includes the export date to provide a record of when the file was generated.

	A	B	C	D	E	F	G
1	Exported On - 5/9/2022 10:56:43 AM						
2	Comparative ~ Date Range: 1/1/2022 Sat - 1/31/2022 Mon (1 Month)						
3	Total Company: 2						
4	Dataset: Bottling						
5	User: JDOE						
6	Cube: Sales						
7	Path: Customer.Company:						
8	By: Company						
9	Sort: Company: Ascending						
10		Company	Units	Net Revenue	Net Price	Margin	
11		Company	269924	237839	0.88	116826	

Smarter drilling in Exception Time Series grids with dynamic collections

In this version, drilling is more intuitive in Exception Time Series grids with dynamic collection filters. If you drill on passing or failing members for a specific date, the resulting list will use the original grid timeframe (e.g., all twelve months) when determining members that meet the collection criteria. The list will display the subset of these members that pass or fail the exception test on the given date. As a result, the number of members in the list will match the cell in original grid.

06/2021	169	23.9	539	76.1	262	37.0
07/2021	167	23.9				
08/2021	172	24.1				
09/2021	161	22.9				
10/2021	153	21.9				
11/2021	146	20.9				
12/2021	154	21.9				
Average	153	21.9				
Net Cumulative	284	40.9				
Participation		54.9				

Exception (Passed Customer) ~ [Units >= 1]

Our New Diet | Customer List

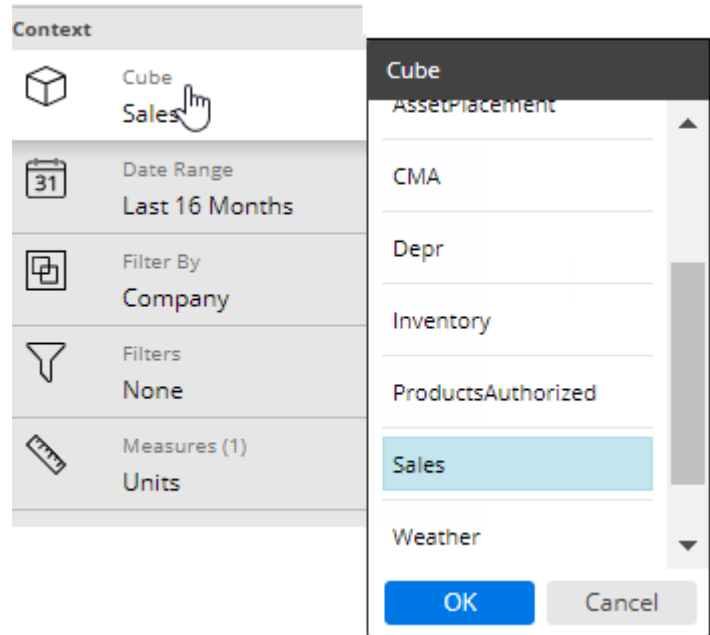
Customer	CustName	Units ↓
<input type="checkbox"/> 70466	S. NEWBURG DIST. # 715	134
<input type="checkbox"/> 11908	VILLAE NORTH # 17	134
<input type="checkbox"/> 70431	S. NEWBURG DIST. # 155SS	82
<input type="checkbox"/> 11902	VILLAGE NORTH # 71	65
<input type="checkbox"/> 70459	S. NEWBURG DIST # 935	65
<input type="checkbox"/> 70471	S. NEWBURG DIST. # 056	47
<input type="checkbox"/> 70205	OBECK INC #4801	44
<input type="checkbox"/> 11902	VILLAGE NORTH # 71	65
Total (154)		1,388

1 to 50 of 154 | Page 1

Improved usability

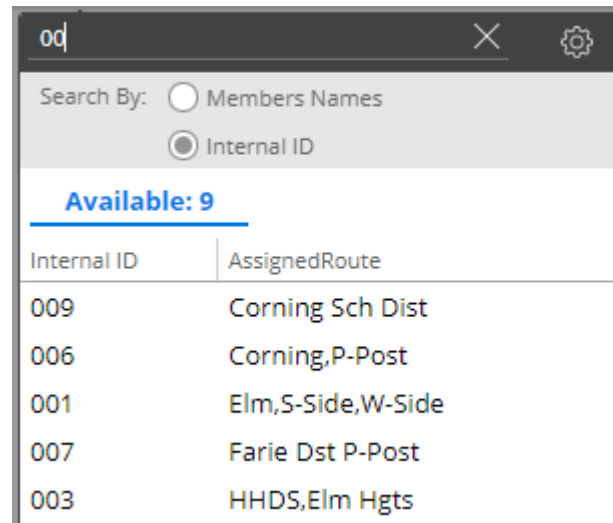
Cube sorting -

This version sorts cubes alphabetically to make it easier to find data.



More information -

When searching or selecting members by code/ID, you can see names in addition to codes to quickly identify what you are looking for.



Security enhancements

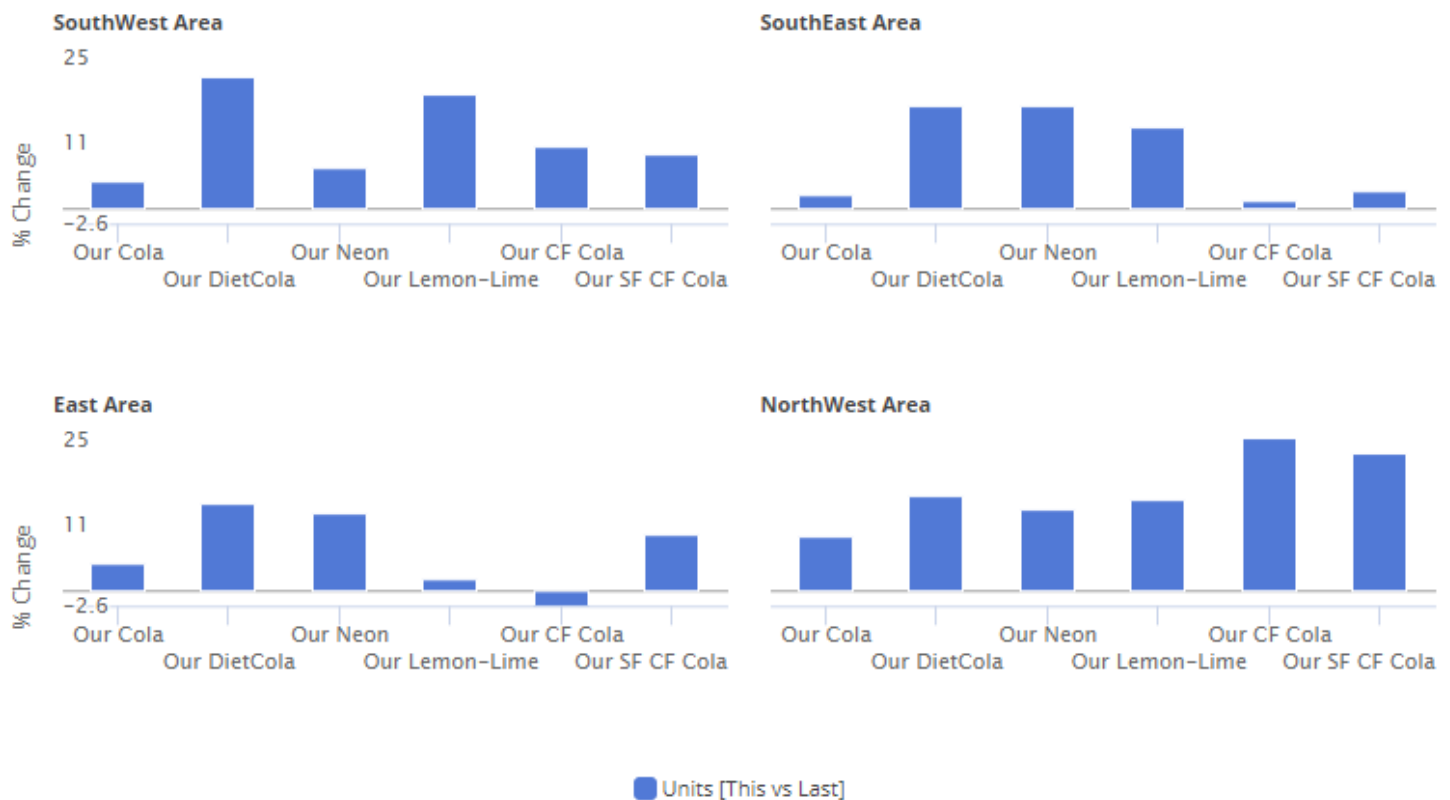
This version improves security by encrypting cookies.

Version 8.2

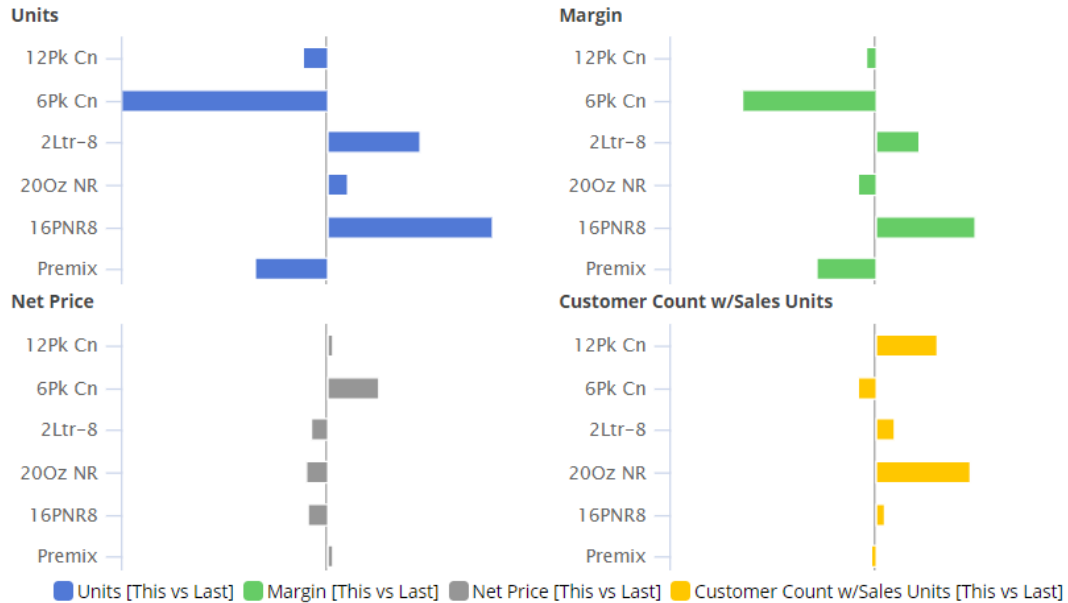
Trellis charts

The trellis chart shows performance across various people, places, and things. The trellis (i.e., small multiple) displays an array of small graphs for multiple sub-categories to break the data into smaller pieces. The trellis makes it faster and easier for Dashboard Designers to build multiple visualizations into a dashboard. The designer can pick the layout (e.g., 2 x 2) and other settings, such as borders, custom headings, consistent member order, and more.

When a standard trellis is on, each graph represents a top-level grouping (e.g., each region). The data is then broken down according to the next level (e.g., brands in each region).



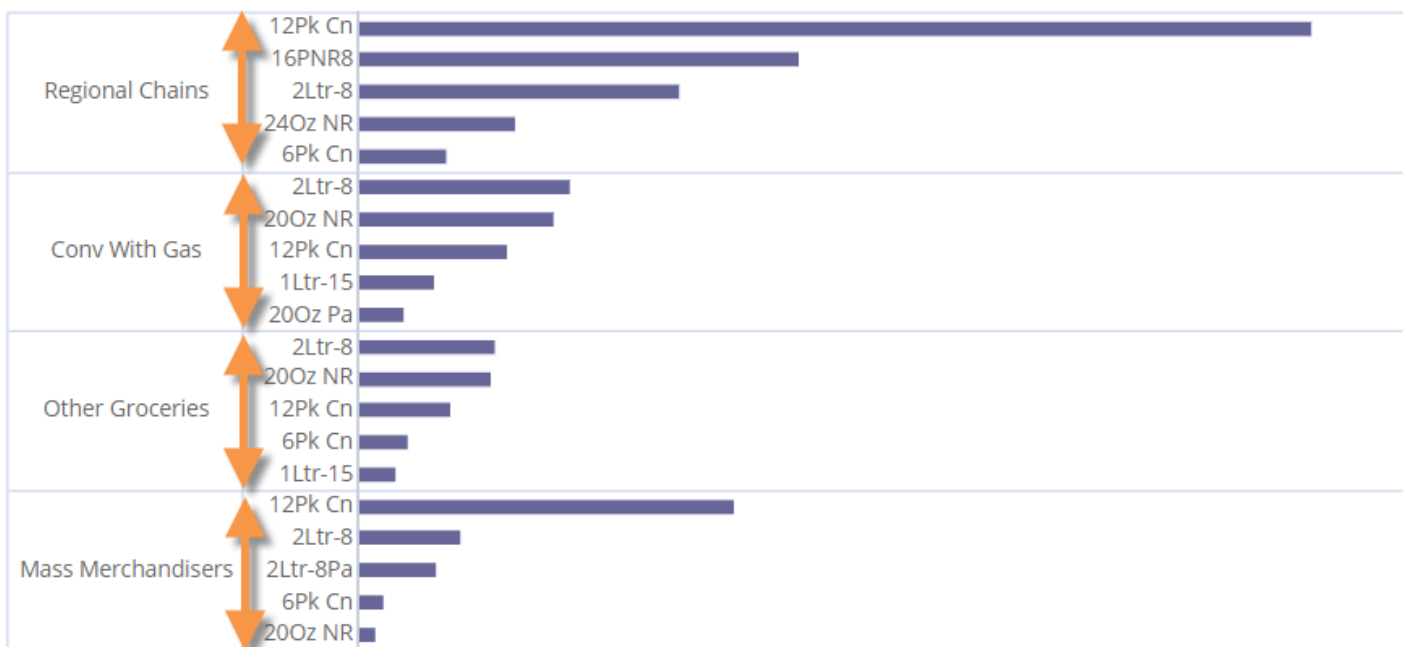
A measure trellis is also available. A measure trellis shows a small graph for each measure, grouping the data at the top level. A measure trellis can help correlate and compare performance metrics.



More options for expanded graphs

Starting with Version 8.0, you could expand dimensions to see data at a more granular level in comparative and mix graphs. In Version 8.2, you can choose how many subgroupings to show in each category (i.e., truncate expanded members). This new graph setting adds power and flexibility to expanded graphs by allowing you to fit the most important information on the screen.

For example, view the top five packages in each channel.



Improvements in custom fields (i.e., rule-based fields)

Custom fields can incorporate business logic and calculations beyond the data in the UXT Server. For example, custom fields can make action-oriented recommendations based on criteria for multiple measures. In previous versions, custom fields were defined entirely within the Salient Dashboards configuration files. This version provides a new method for creating and managing custom fields via an administrative portal in the Salient Dashboards browser application. This new method has the following advantages:

- Simple user interface that includes import/export capabilities
- Greater flexibility due to C# programming language in the field's formula
- Real-time changes and additions to custom fields
- Ability to run multiple iterations of calculations (e.g., in standard deviations).

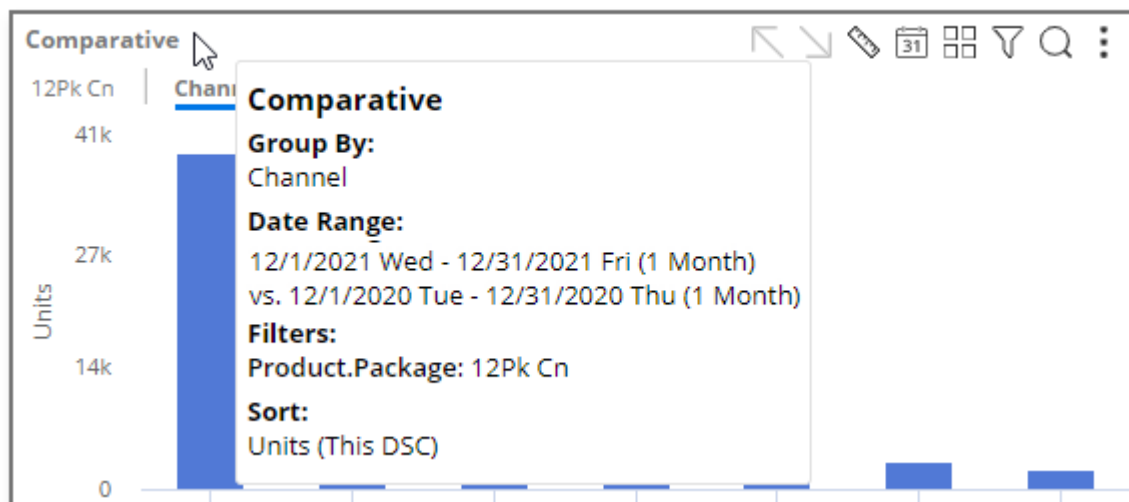
The previous method for defining custom fields is still available. Contact Salient for more information.

Flexible date lookups

Your organization can create date lookup tables to allow users to replace calendar dates with dates that are more meaningful. For example, a lookup table could be used to compare calendar dates with specific business days during the previous timeframe. If configured, date lookups are available in the Advanced date setup area.

Better tooltips

Tooltips that show important information, such as how the data is grouped, date range details, filters, sort, and more, are easier to read in this version. Just place your cursor over a widget's title bar to see its tooltip.



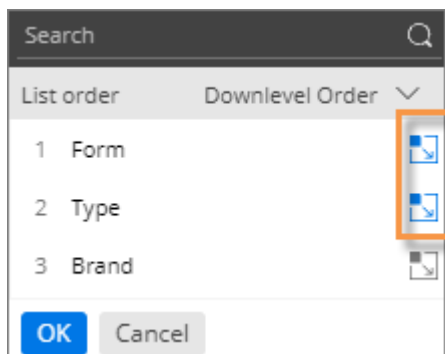
Version 8.0

Improved performance

This version provides significantly faster response times and better scalability due to improvements in multithreading on the UXT Server. On average, the UXT system will respond three to four times faster than previous versions. Even greater improvements (up to 1000x faster) are possible on large data queries.

Faster tree expansion

You can automatically expand dimensions and keys to see underlying data. Just turn on auto-expand for a dimension or key; all its members will be expanded to the next level. You can expand multiple levels to create a customized tree of performance metrics.



Form	Units	
	This	Last
<input type="checkbox"/> PET	110,746	151,634
<input type="checkbox"/> Carbonated	110,746	151,634
<input checked="" type="checkbox"/> Our Cola	54,103	74,150
<input checked="" type="checkbox"/> Our Neon	22,571	30,434
<input checked="" type="checkbox"/> Our DietCola	16,462	22,738
<input checked="" type="checkbox"/> Our CF Cola	5,484	7,604
<input checked="" type="checkbox"/> Our SF CF Cola	5,364	7,384
<input checked="" type="checkbox"/> Our Lemon-Lime	3,690	5,088
<input checked="" type="checkbox"/> Our New Diet	3,072	4,236
<input type="checkbox"/> Cans	110,319	181,104
<input type="checkbox"/> Carbonated	110,319	181,104
<input checked="" type="checkbox"/> Our Cola	56,345	89,542
<input checked="" type="checkbox"/> Our DietCola	17,610	30,384
<input checked="" type="checkbox"/> Our Neon	16,237	26,970
<input checked="" type="checkbox"/> Our SF CF Cola	6,214	10,618
<input checked="" type="checkbox"/> Our CF Cola	5,981	10,208
<input checked="" type="checkbox"/> Our Lemon-Lime	4,323	6,992
<input checked="" type="checkbox"/> Our New Diet	3,609	6,390
<input type="checkbox"/> Fountain Tank	6,548	8,650
<input type="checkbox"/> Carbonated	6,548	8,650

New multi-dimensional grid (i.e., flat view)

A new multi-dimensional grid expands dimensions and keys into columns to provide an interactive view of performance at any level. Each unique combination has its own row. You can sort the rows to find opportunities and drill down to investigate any cross-sections of data. This new grid is called a "flat" view because it removes the constraint of built-in subgroupings.

Region	KeyAccount	Package	Brand	This	Units Last	Diff ^	% Change
⊕ SouthEast Area	Serv-Rite	6Pk Cn	Our Cola	2,995	5,382	-2,387	-44.35
⊕ East Area	Faire Dist.-South	12Pk Cn	Our Cola	292	2,188	-1,896	-86.65
⊕ Near West Area	All Others	6Pk Cn	Our Cola	5,113	2,188	2,925	133.73
⊕ NorthWest Area	Faire Dist-North	12Pk Cn	Our Cola	1,293	2,188	-995	-45.47
⊕ SouthWest Area	Faire Dist-North	12Pk Cn	Our Cola	2,188	2,188	0	0.00
⊕ SouthEast Area	Faire Dist-North	12Pk Cn	Our Cola	1,183	2,836	-1,653	-58.29
⊕ SouthEast Area	Serv-Rite	6Pk Cn	Our Neon	1,985	3,608	-1,623	-44.98
⊕ SouthEast Area	Obeck Inc. North	12Pk Cn	Our Cola	2,359	3,964	-1,605	-40.49
⊕ SouthEast Area	Serv-Rite	6Pk Cn	Our DietCola	1,293	2,580	-1,287	-49.88
⊕ Near West Area	All Others	6Pk Cn	Our DietCola	2,415	3,570	-1,155	-32.35

For example, sort to find specific areas of opportunity.

Improved exporting

This version makes it easier to export data to Excel and comma-separated (csv) files.

- Exporting is significantly faster than previous versions, especially when dealing with multiple levels and large amounts of data.
- This version removes the 1,000-member limitation on 2nd By members (except for record details).
- You can expand data into additional levels beyond the 2nd By dimension to access detailed data outside of Salient Dashboards. Choose the level when you export. Each unique cross-section of data will have its own row. For example:

1st By	2nd By	3rd By	4th By	F	G	H	I
Region	SalesRep	Channel	Package	Units	Net Revenue	Net Price	Margin
East Area	Turner, Michael	Mass Merchandisers	12Pk Cn	113511	277891	2.45	90273
SouthEast Area	Office-Lasoski	3rd Party Operators	6Pk Cn	87349	256662	2.94	106124
NorthWest Area	Johnson, Louise	Regional Chains	12Pk Cn	75574	197307	2.61	78891
SouthEast Area	Baird, Jim	Regional Chains	12Pk Cn	59361	169648	2.86	67582
SouthWest Area	Keller, Brad	Regional Chains	12Pk Cn	42940	110769	2.58	45474
SouthEast Area	English, John	Regional Chains	12Pk Cn	41080	99941	2.43	41464
SouthWest Area	Stark, Solomon	Regional Chains	6Pk Cn	37906	30620	0.81	12851
NorthWest Area	Markey, Ciro	Mass Merchandisers	12Pk Cn	36900	99662	2.7	39046

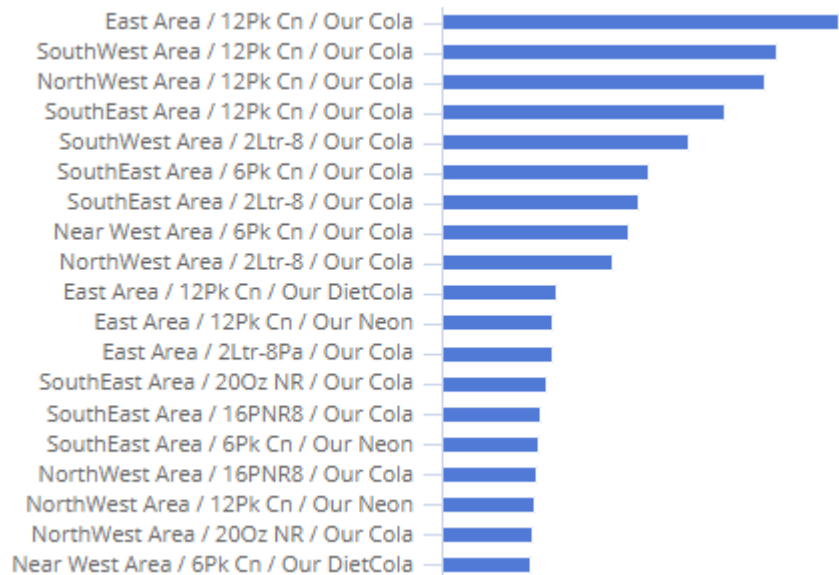
Multi-dimensional visualizations

You can visually compare multiple levels of data in graphs.

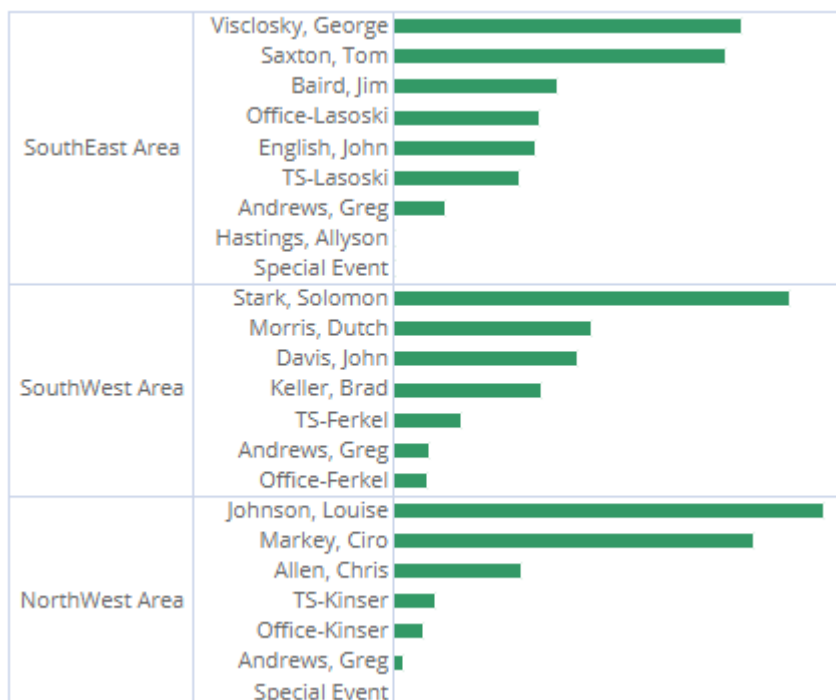
Expanded comparative graphs

You can expand dimensions and keys in Comparative and Multi Comparative graphs to view performance at a more granular level. The same powerful options are available for expanded charts: graph percent change or values; show vertical or horizontal bars, and so on. In addition, bars can be arranged independently or grouped under the parent level.

- Independent bars:
Using the new "flat view" data, you can see separate, independent bars for each combination across multiple dimensions. For example, compare the top package/brand combinations across regions.



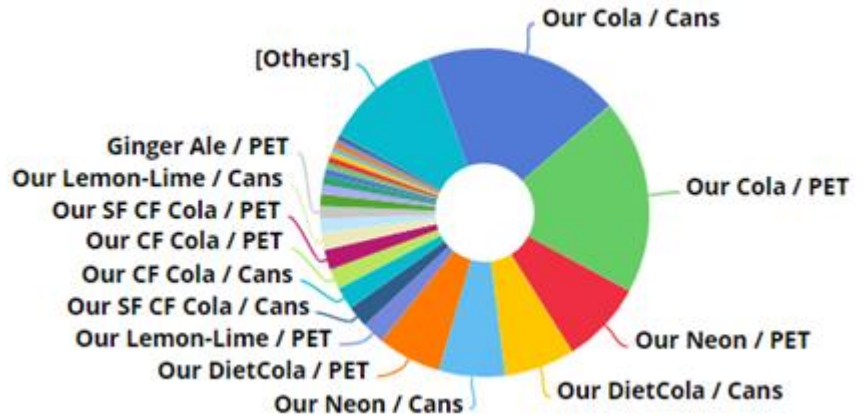
- Grouped bars:
The graph can group bars under the parent level—allowing you to compare overall results as well as performance within a category. For example, which sales representatives have the highest margins across the company and within their regions?



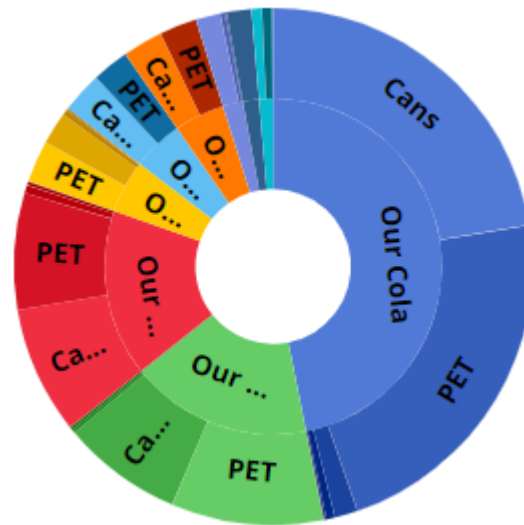
Multi-level pie charts

You can expand mix graphs to see the percent contributed by cross-sections of the data.

- Independent pie slices:
Pie slices can be arranged in a single level to represent each combination's percent of the total. For example, identify the top combinations of brand and package type.

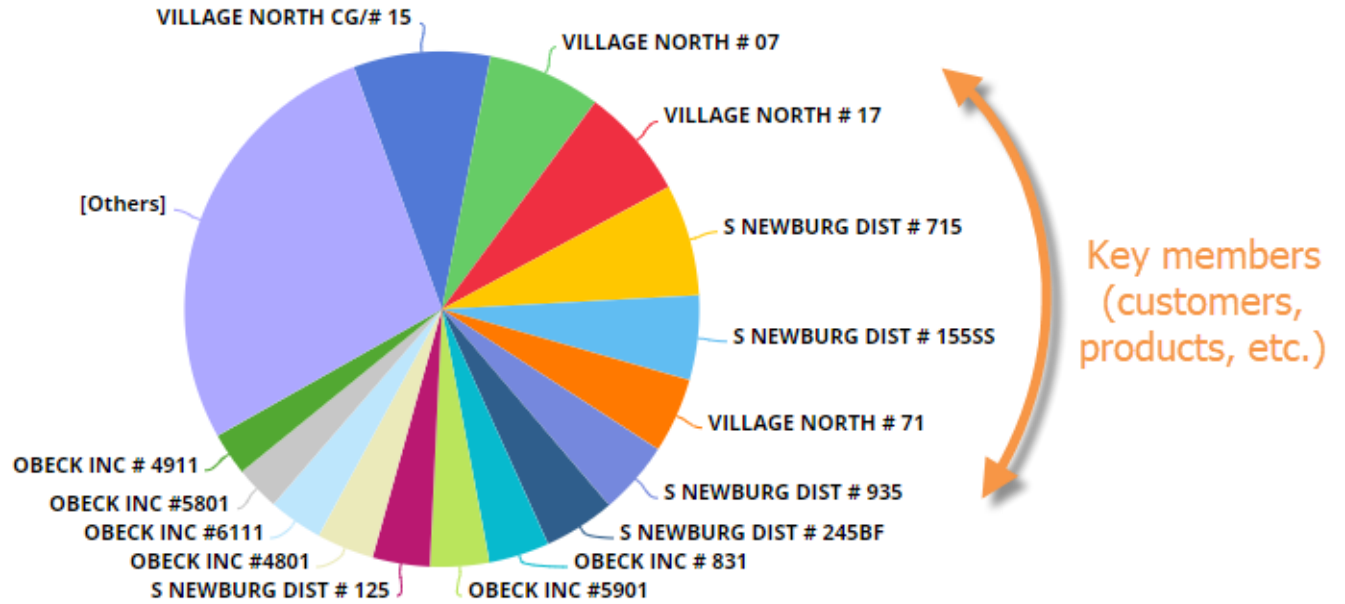


- Sunburst:
Pie slices can be arranged in a series of rings to show the breakdown of data within multiple categories. The center ring represents the top-level data (1st By); the data becomes more granular as you move outward. For example, visualize the breakdown of package types within brands.



Key-level pie charts

The mix chart is now available at the key level (e.g., by customer) to show how much individual key members contributed to the total.



Keyboard shortcuts

Keyboard shortcuts let you quickly perform common tasks, such as opening the dashboard menu, switching between dashboard modes, opening the filter panel, selecting the workspace, copying/pasting, and more. For example:

The screenshot shows the Salient Dashboards interface with several keyboard shortcuts highlighted in blue callouts:

- n** New (blank) dashboard (rights required)
- e** Go to edit mode (rights required)
- O** Open dashboards menu
- f** Open/close filters panel

The interface includes a top navigation bar with 'SALIENT', 'Dashboards', and a search bar. Below the navigation bar, there are tabs for 'New', 'Explore', and 'Refresh'. The main content area displays a table of packages with columns for Package, Price, Revenue, and Profit. A 'Filters' panel is visible on the right side of the dashboard.

Easier dashboard design

New features make it faster and easier to design dashboards.

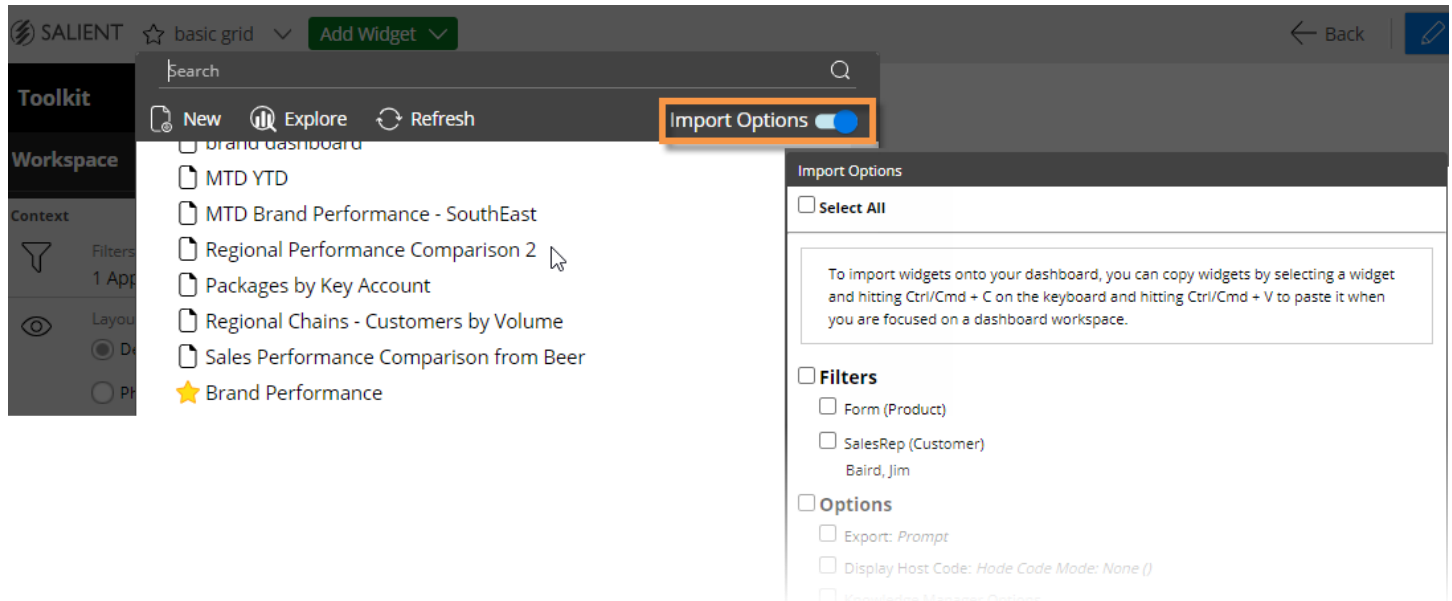
Copy widgets

You can quickly copy and paste widgets from one dashboard into another. Just select the widget and press Ctrl + c to copy; then press Ctrl + v to paste. You can also copy and paste within the same dashboard.

The diagram illustrates the copy and paste workflow for widgets. It shows two dashboard panels. The first panel has a pie chart widget selected, with a blue callout indicating the **Ctrl + C** Copy shortcut. An orange arrow points to the second panel, which has a blank space for pasting, with a blue callout indicating the **Ctrl + V** Paste shortcut.

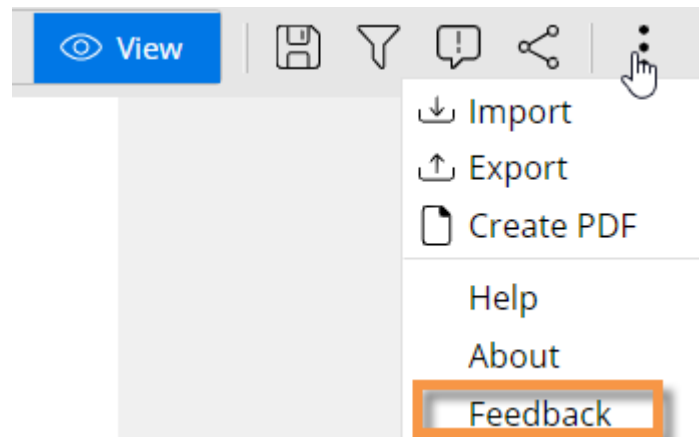
Import dashboard options

You can import options, such as member coloring, filters, and dashboard settings, from other dashboards to minimize setup time.



Contact Salient support

A new feedback tool makes it easy to contact Salient support and send information for troubleshooting. Feedback may include feature requests, bug reporting, requests for assistance, and general comments.



For more information

To see instructions for using new features or information about earlier versions, refer to the Salient Dashboards help or user manual provided with the release. Some features may require additional licensing.