

What's New in Salient Dashboards

Salient Management Company is dedicated to helping our clients improve their performance and efficiency through better and faster access to actionable intelligence. We continuously strive to improve our revolutionary suite of solutions.

Version 8.3

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	351,013	3.41	208,106
> <input type="checkbox"/> 0115	12PK CN Our CF	101,013	351,013	2.83	87,538
> <input type="checkbox"/> 0116	12PK CN Our SF	101,013	351,013	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

Shift

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' configuration page. Key features are highlighted with callouts:

- Turn on/off conditions:** A blue callout points to the 'Conditions' toggle switch.
- Quick expressions:** A blue callout points to a list of variables on the left, including {{dashboardName}}, {{dashboardUrl}}, {{dashboardMobileUrl}}, {{widgetTitle}}, {{firstByKey}}, {{firstByDimension}}, {{numMatches}}, and {{matchedMembers}}.
- Template selection:** A blue callout points to the 'Template' dropdown menu.
- Rich text editor:** A blue callout points to the rich text editor area containing the message content.
- XLSX and PDF attachments:** A blue callout points to the checkboxes for 'Email data export (.xlsx)' and 'Email PDF of dashboard'.

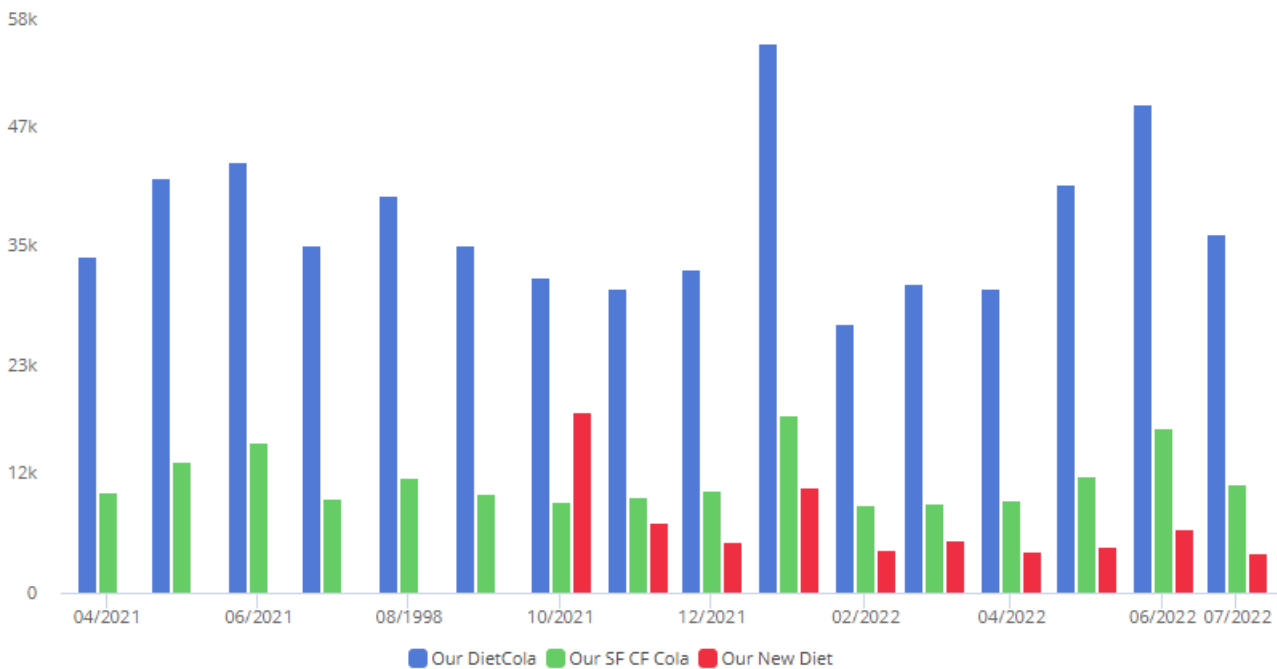
More control over mobile dashboard layouts (in V8.3.4+)

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.



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.

Region	Ur
<input type="checkbox"/> 04 East Area	58,
<input type="checkbox"/> 21 Near West Area	20,
<input type="checkbox"/> 07 NorthEast Area	
<input type="checkbox"/> 01 NorthWest Area	56,
<input type="checkbox"/> 06 SouthEast Area	69,
<input type="checkbox"/> 02 SouthWest Area	65,

Grid improvements

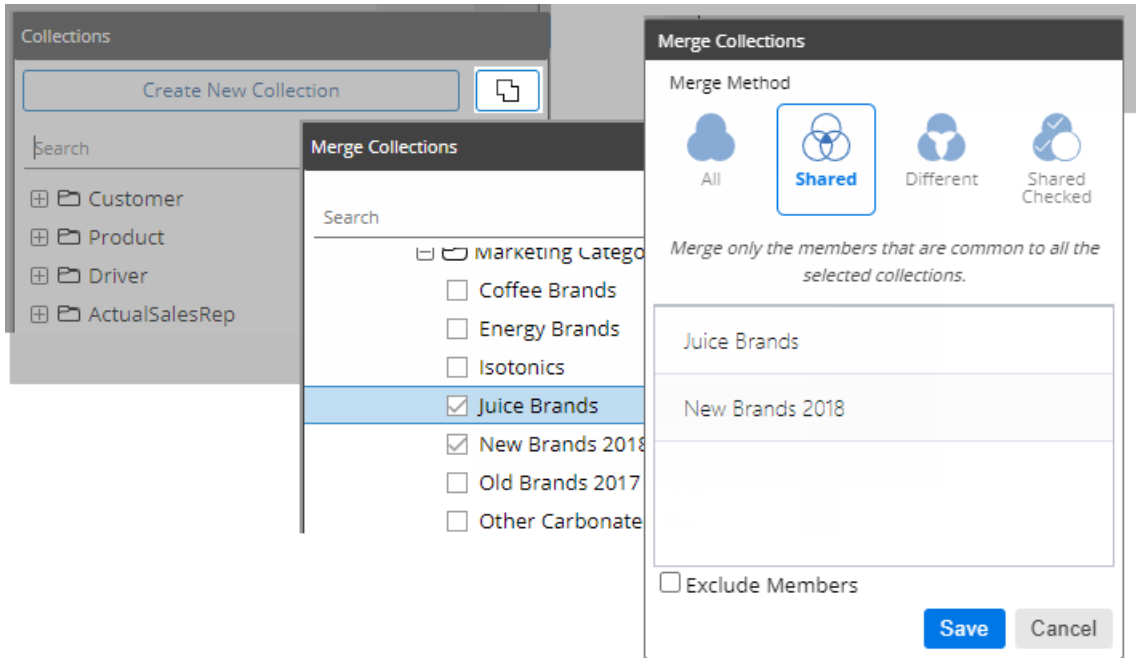
- This version provides better performance in large grids with many columns.
- Grids have an updated appearance. For example, expand multiple levels of data using streamlined arrows instead of plus buttons.
- A new option provides endless scrolling within a single page. When infinite scrolling is on, 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.

The screenshot shows a data grid with columns for 'Units' and 'Customer Count w/Sales Units'. Annotations highlight new features: 'Updated appearance' points to a dropdown arrow in the 'Region' column; 'Endless scrolling' points to the bottom of the grid; 'Save and reset column widths' points to a context menu with a 'Reset to Auto Width' option.

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	
> <input type="checkbox"/> Saxton, Tom	16,831	16,433	398	2.42	93	94	-1	
> <input type="checkbox"/> [Name]	16,013	17,052	-1,039	-6.09	78	85	-7	
> <input type="checkbox"/> [Name]	13,229	9,872	3,357	34.01	9	9	0	
> <input type="checkbox"/> [Name]	10,431	9,610	821	8.54	7	6	1	
> <input type="checkbox"/> Office-Lasoski	8,518	6,909	1,609	23.29	40	42	-2	
> <input type="checkbox"/> TS-Lasoski	3,278	3,544	-266	-7.51	126	137	-11	
> <input type="checkbox"/> Andrews, Greg	974	1,213	-239	-19.70	55	56	-1	-1.79
> <input type="checkbox"/> Special Event	29	42	-13	-30.95	2	3	-1	-33.33
> <input type="checkbox"/> 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	0	2.44
> <input type="checkbox"/> East Area	58,896	55,051	3,845	6.98	261	261	0	-4.21
> <input type="checkbox"/> NorthWest Area	56,410	50,748	5,662	11.16	317	317	0	-1.89

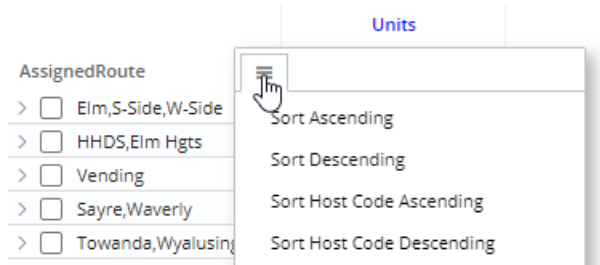
Merge collections

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 Reven	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	22.1				
10/2021	153	21.1				
11/2021	146	20.1				
12/2021	154	21.1				
Average	153	21.1				
Net Cumulative	284	40.1				
Participation		54.1				

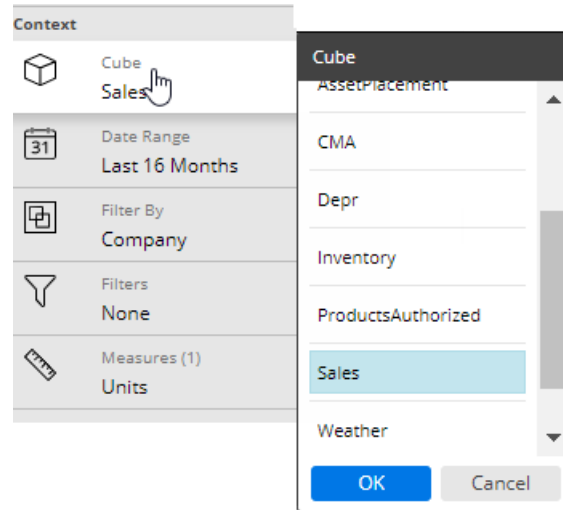
Exception (Passed Customer) ~ [Units >= 1]			
Our New Diet		Customer List	
Customer	CustName		Units ↓
<input type="checkbox"/>	70466	S. NEWBURG DIST. # 715	134
<input type="checkbox"/>	11908	VILLAE NORTH # 17	134
<input type="checkbox"/>	70431	S. NEWBURG DIST. # 15555	82
<input type="checkbox"/>	11902	VILLAGE NORTH # 71	65
<input type="checkbox"/>	70439	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

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Improved usability

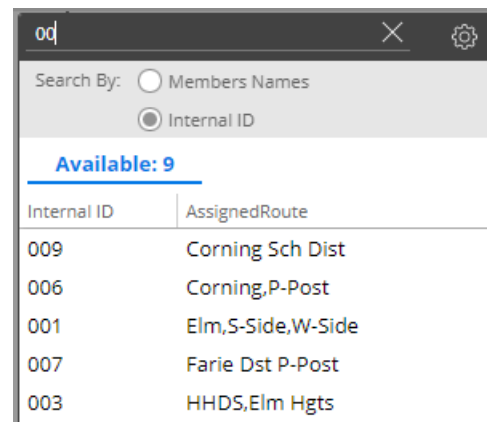
Cube sorting -

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

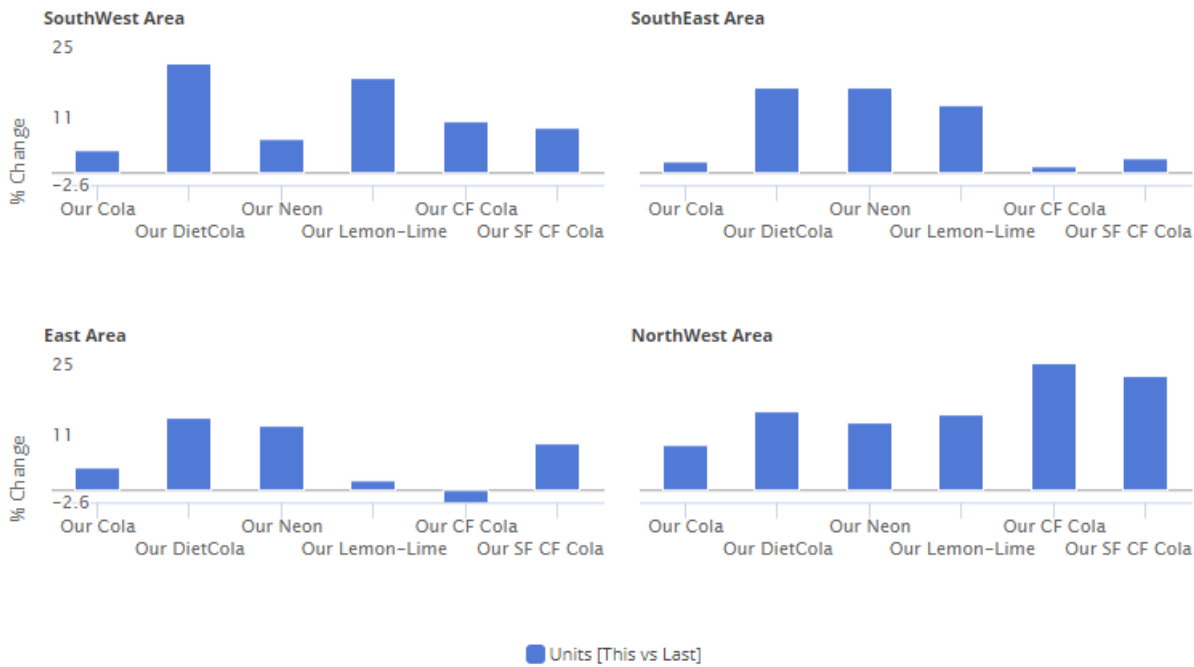
This version improves security by encrypting cookies.

Version 8.2

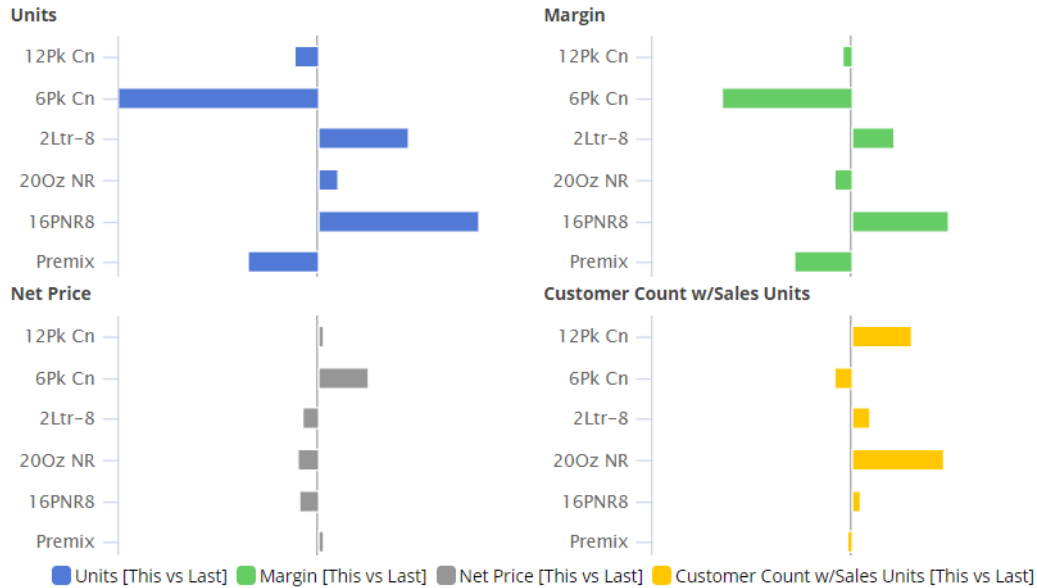
Trellis charts

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).



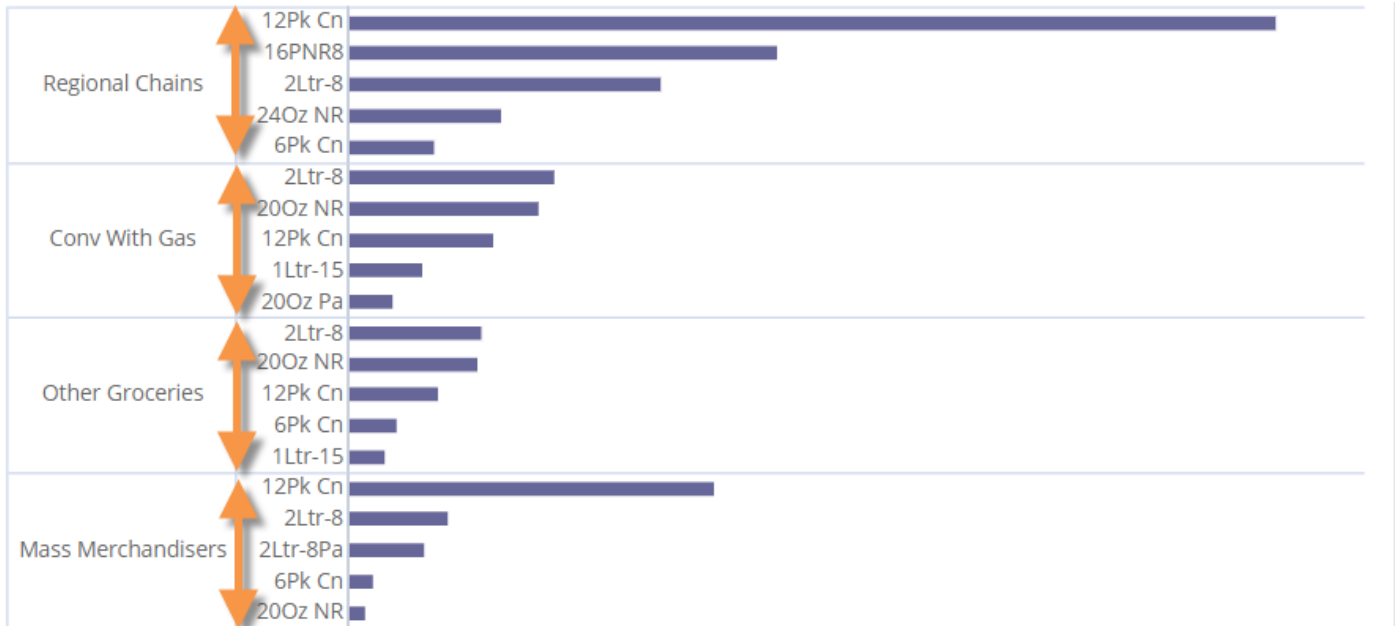
A measure trellis is also available. A measure trellis shows a small graph for each measure, grouping the data at the top level. A measure trellis can help correlate and compare performance metrics.



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).

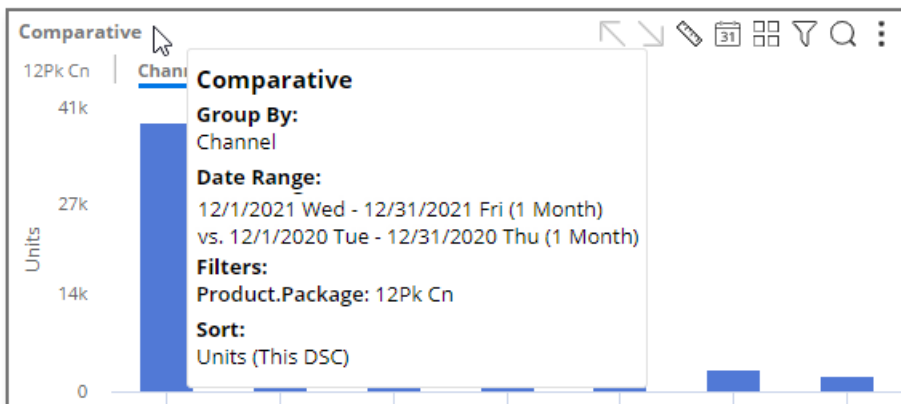
The previous method for defining custom fields is still available. Contact Salient for more information.

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.



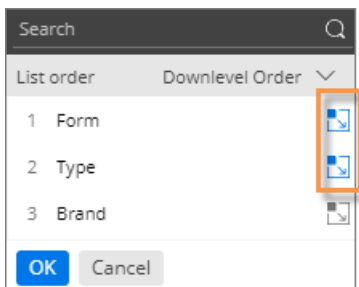
Version 8.0

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		% Change
					Last	Diff ^	
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	5,113	0	0.00
NorthWest Area	Faire Dist-North	12Pk Cn	Our Cola	1,215	1,215	0	0.00
SouthWest Area	Faire Dist-North	12Pk Cn	Our Cola	4,113	4,113	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 Revent	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

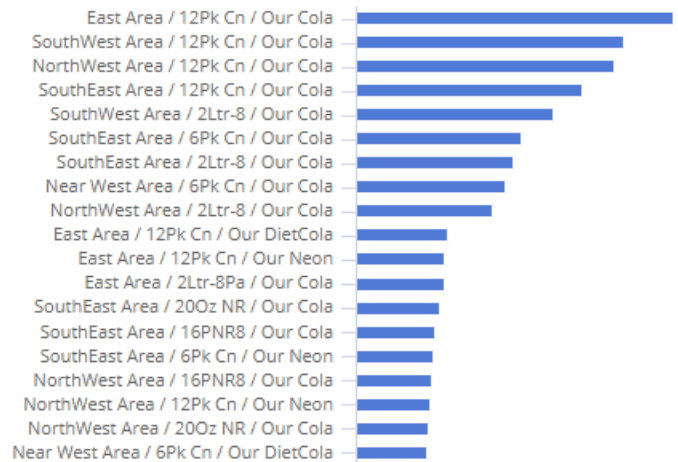
Multi-dimensional visualizations

You can visually compare multiple levels of data in graphs.

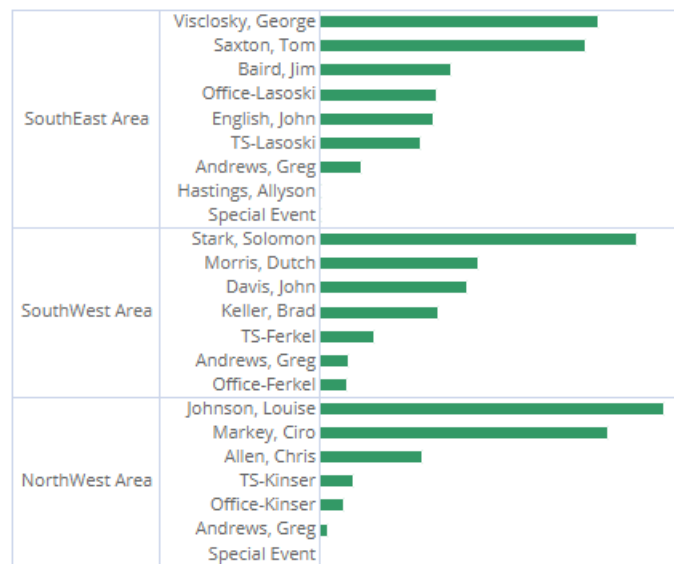
Expanded comparative graphs

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.



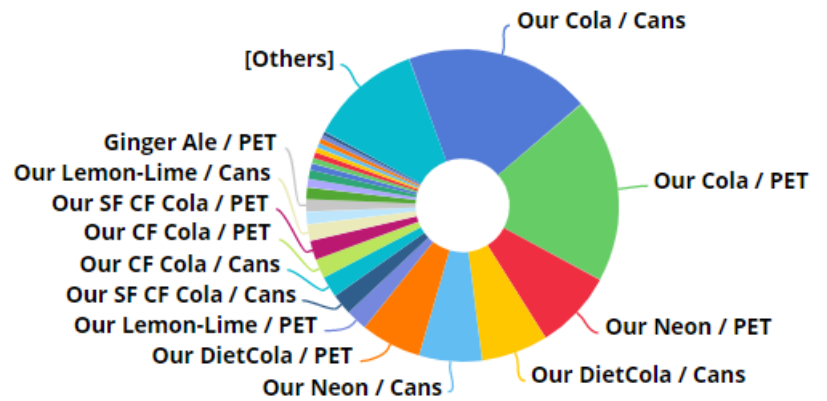
- Grouped bars:**
 The graph can group bars under the parent level—allowing you to compare overall results as well as performance within a category. For example, which sales representatives have the highest margins across the company and within their regions?



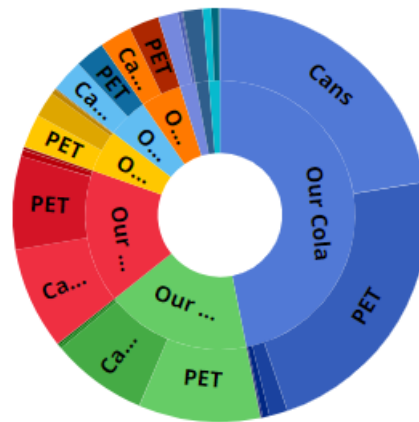
Multi-level pie charts

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.

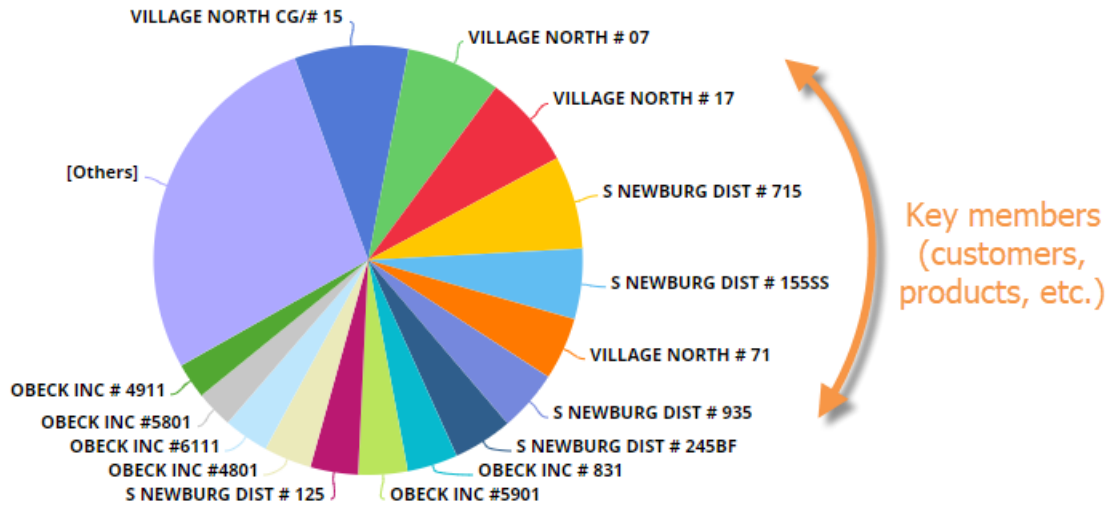


- Sunburst:
Pie slices can be arranged in a series of rings to show the breakdown of data within multiple categories. The center ring represents the top-level data (1st By); the data becomes more granular as you move outward. For example, visualize the breakdown of package types within brands.



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:

n

New (blank) dashboard
(rights required)

e

Go to edit mode
(rights required)

o

Open dashboards menu

f

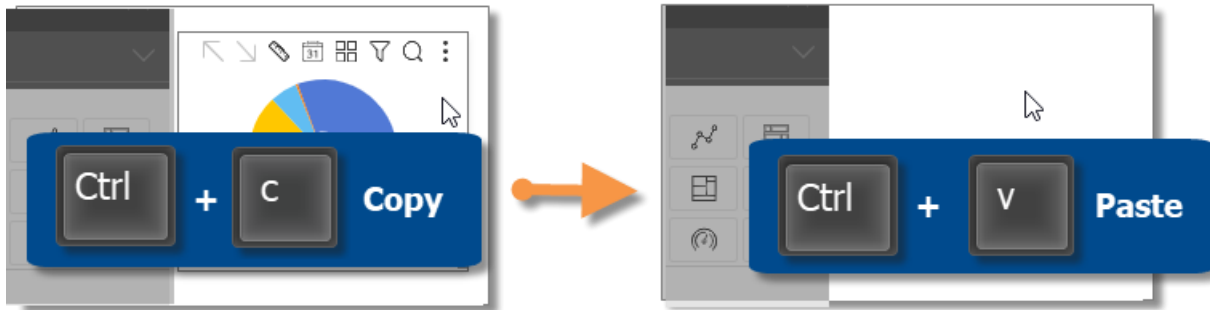
Open/close filters panel

Easier dashboard design

New features make it faster and easier to design dashboards.

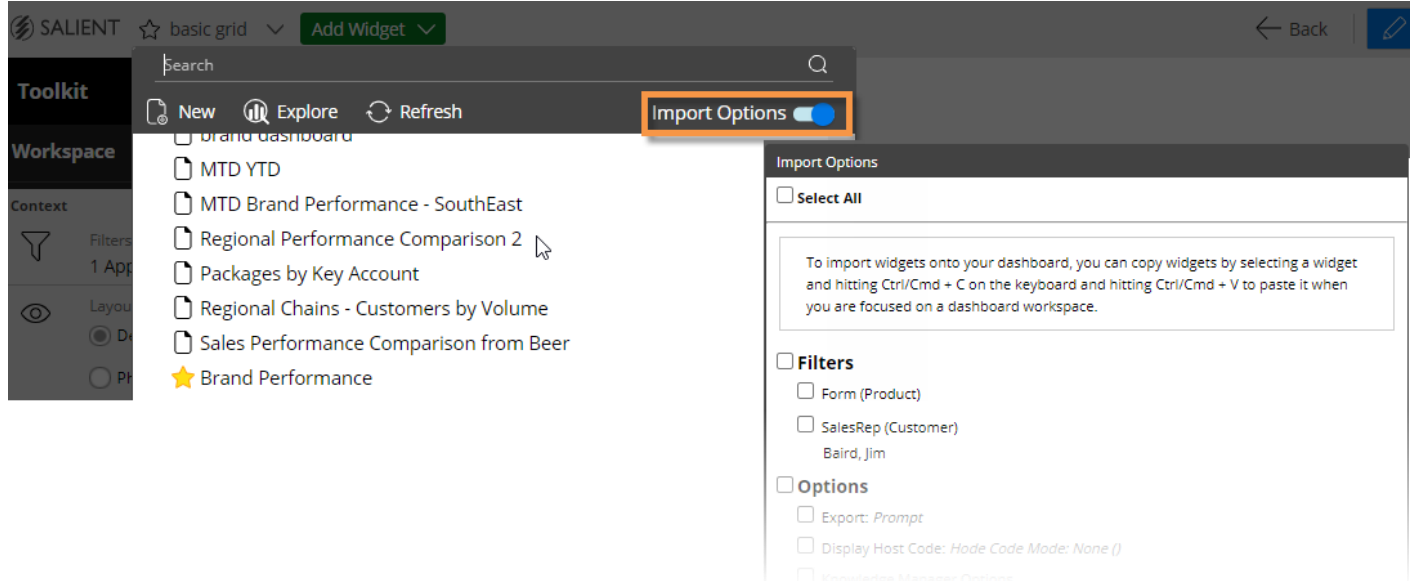
Copy widgets

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.



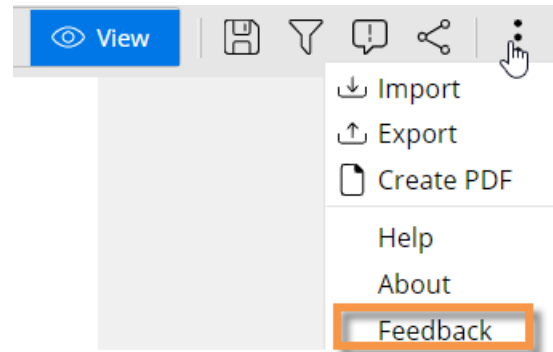
Import dashboard options

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.