

January 28, 2021

# What's New in Salient Interactive Miner<sup>™</sup> (SIM)

## Version 7.70

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# What's New in SIM

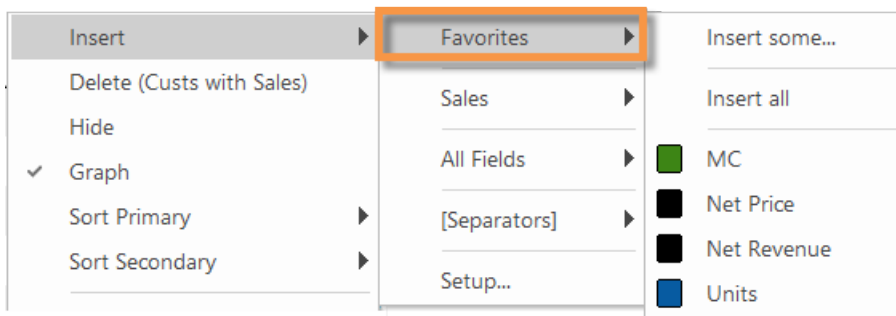
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## Version 7.70

### Easy access to favorite data fields

This version makes it easier to insert and select your favorite data fields or "measures." You can choose your favorite data fields in preferences. These data fields will appear in a favorites menu in various areas of SIM. In addition, your administrator may preconfigure favorite data fields for your user account.



# More options for reporting on multiple timeframes

## Actual dates in Multi Comparative headings

New options allow you to show actual dates in headings of Multi Comparative, Multi Comparative-2, and Multi Comparative-4 analyses. If selected, the actual dates will replace or append the default labels (This, Last, Diff, prior, etc.) to precisely represent periods of time. For example, you might want to see beginning and ending dates for each timeframe. Alternatively, you can show abbreviated dates, which shorten the date labels if possible (e.g. only week ending date for 1 week).

Default column headings					
Month to Date					
This	1 week prior	2 weeks prior	Last	This	Diff
8,476	8,711	12,706	16,139	19,699	3,560
6,390	6,089	11,679	14,779	16,765	1,986

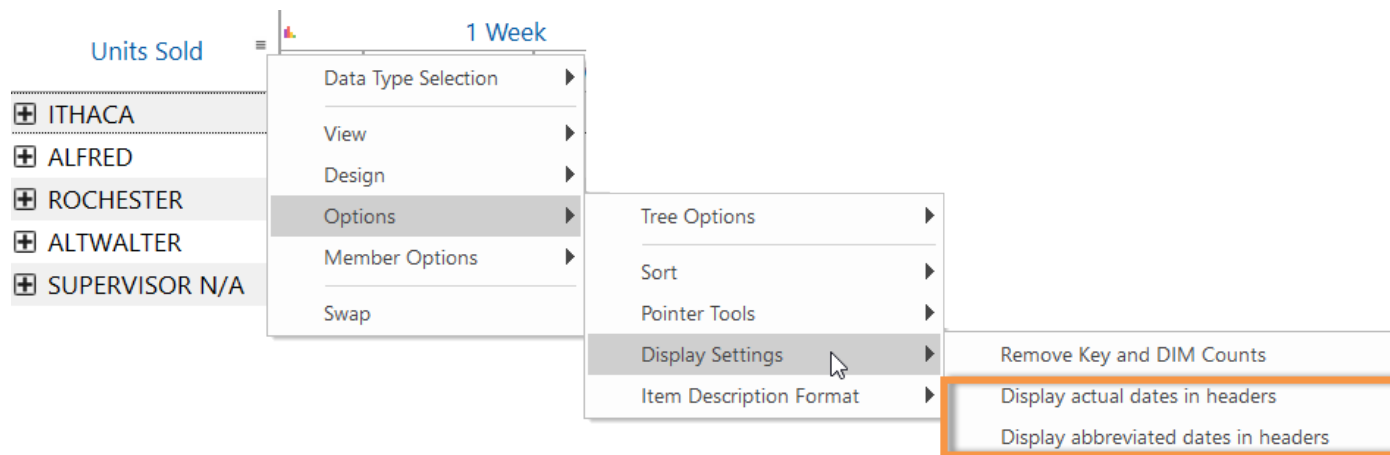
  

Actual dates					
1 Week			Month to Date		
7/11/2018 - 7/17/2018	7/4/2018 - 7/10/2018	6/27/2018 - 7/3/2018	7/1/2017 - 7/17/2017	7/1/2018 - 7/17/2018	Diff (7/1/2018 - 7/17/2018 vs. 7/1/2017 - 7/17/2017)
8,476	8,711	12,706	16,139	19,699	3,560
6,390	6,089	11,679	14,779	16,765	1,986

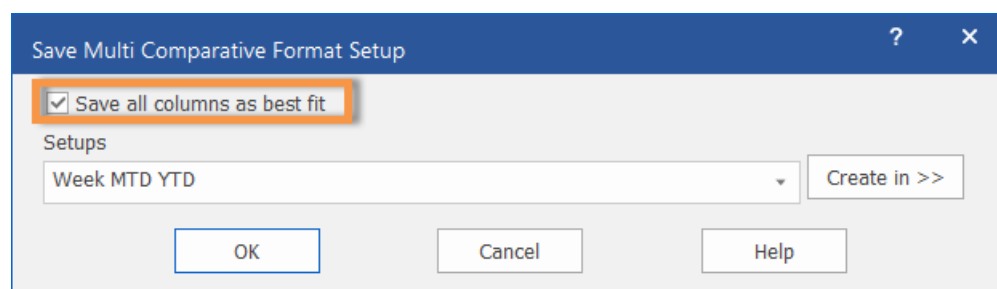
Abbreviated dates					
Month to Date					
7/17/2018	7/10/2018	7/3/2018	7/1/2017 - 7/17/2017	7/1/2018 - 7/17/2018	Diff (7/1/2018 - 7/17/2018 vs. 7/1/2017 - 7/17/2017)
8,476	8,711	12,706	16,139	19,699	3,560
6,390	6,089	11,679	14,779	16,765	1,986

The date settings are used in bookmarks, graphs, and exported data so you can save your changes and view date headings in other formats. To turn on date headings (actual or abbreviated), go to the tools menu and select Options, Display Settings, and your preferred option.



## Best fit columns in Multi Comparative setups

When saving a Multi Comparative setup, you can apply the "best fit" setting, so that column widths adjust automatically. This setting is on by default, even if a fixed width was applied to a column; however, you can turn it off if you wish. In general, the "best fit" is recommended to avoid truncating data or headings, especially when using the new date headings shown above. To apply the best fit setting to an existing Multi Comparative setup, edit it and leave the **Save all columns as best fit** box checked.



## Point-and-click enhancements

### Keyboard shortcuts for "checkmarking" what interests you

Press Ctrl or Shift to use the checkmark tool, which allows you to point-and-click to select items. You can then investigate the "checkmarked" items—by viewing their subtotals, drilling down, and more.

⊕	✓ Local Chains	3,330	2,387
⊕	Superettes	1,994	1,685
⊕	Fast Food	3,330	2,387
⊕	3rd Party Operators	1,310	4,052

**Ctrl** - checkmark individually

**Shift** - checkmark a range

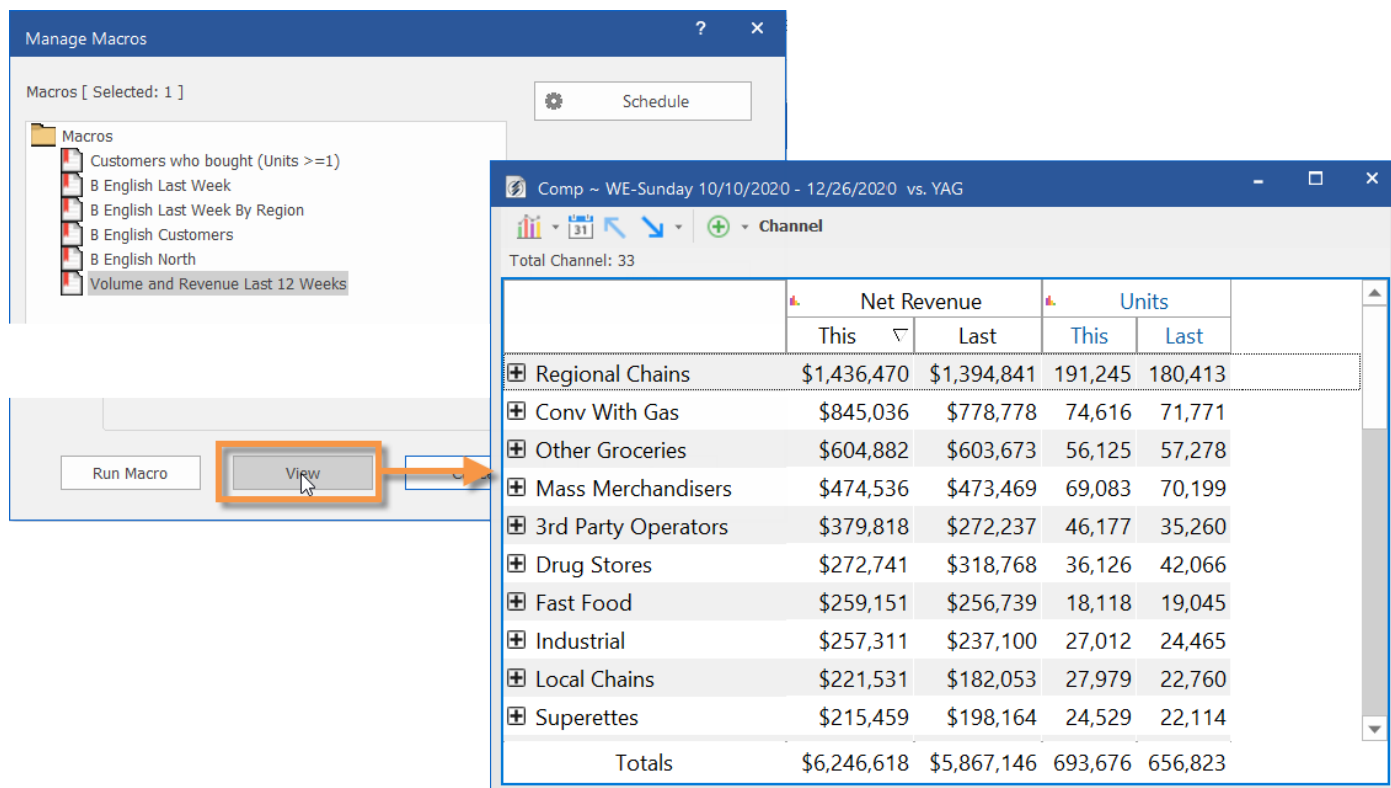
### Shortcut toolbar availability

The shortcut toolbar is now available when the checkmark pointer is on, making it easier to investigate the data. Just click on a row or graph component to show the shortcut toolbar; you can then drill, list members, or save a collection for the checked or unchecked members. Previously, this toolbar was unavailable when using the checkmark toolbar.

⊕	3rd Party Operators	4,250.39	3,130.19
⊕	Drug Stores	2,127.70	2,110.63
⊕	✓ Local Chains	8,820.50	7,768.00
⊕	Industrial	377.63	361.27
⊕	Superettes	4,260.00	4,220.91

## Improved management of automated reports (i.e., macros)

You can view macro results within SIM, allowing you to preview macro data and settings. In addition, you can make changes to the macro in the view window and then save your changes—either as a new macro or by overwriting an existing macro.



The screenshot shows the 'Manage Macros' window on the left and a preview window on the right. The 'Manage Macros' window lists several macros, with 'Volume and Revenue Last 12 Weeks' selected. The preview window displays a table of data for this macro, showing Net Revenue and Units for various categories over two periods: 'This' and 'Last'.

	Net Revenue		Units	
	This	Last	This	Last
Regional Chains	\$1,436,470	\$1,394,841	191,245	180,413
Conv With Gas	\$845,036	\$778,778	74,616	71,771
Other Groceries	\$604,882	\$603,673	56,125	57,278
Mass Merchandisers	\$474,536	\$473,469	69,083	70,199
3rd Party Operators	\$379,818	\$272,237	46,177	35,260
Drug Stores	\$272,741	\$318,768	36,126	42,066
Fast Food	\$259,151	\$256,739	18,118	19,045
Industrial	\$257,311	\$237,100	27,012	24,465
Local Chains	\$221,531	\$182,053	27,979	22,760
Superettes	\$215,459	\$198,164	24,529	22,114
Totals	\$6,246,618	\$5,867,146	693,676	656,823

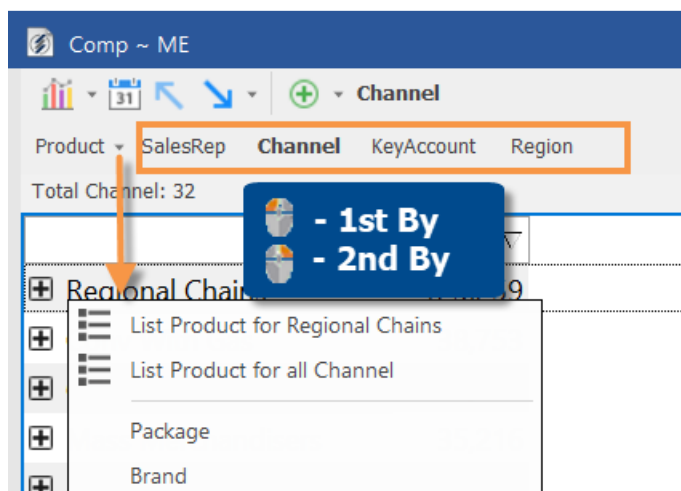
## Improved formatting of exported text

In this version, SIM removes trailing spaces from strings, including host codes, when exporting data to Excel and other formats. The resulting files are easier to search and use. (Host codes are not currently trimmed when used as a prefix with the item name.)

## Version 7.60

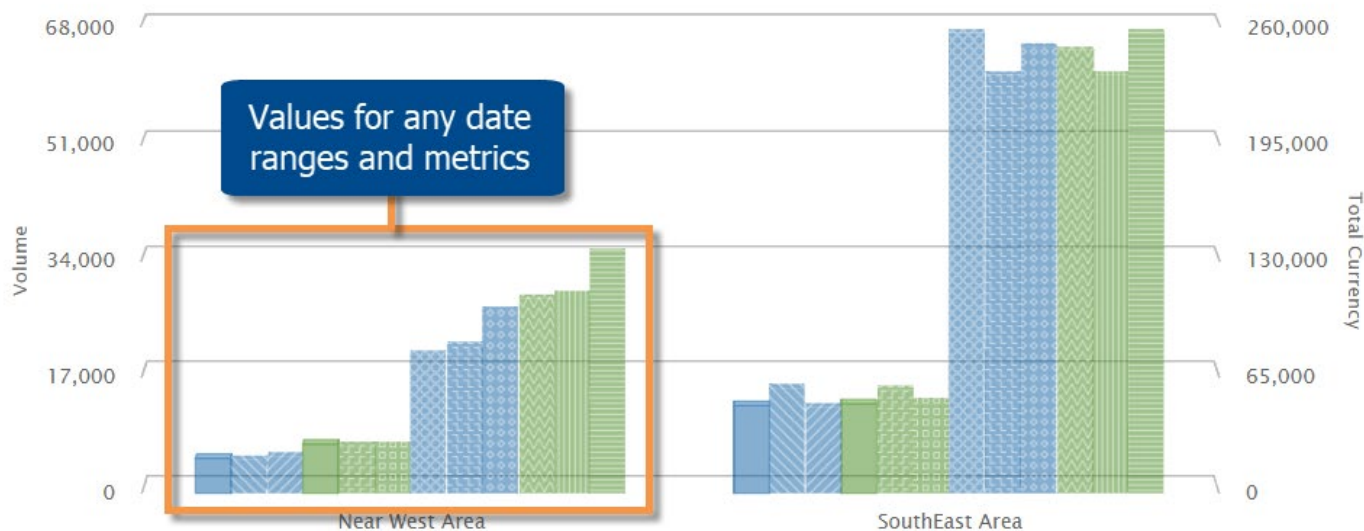
### Group data with a single click

A quick access bar allows you to quickly change how the data is grouped (Group By). Left-click on a button to choose the primary way of grouping the data (1st By); right-click on a button to choose the 2nd By. The quick access bar may also include a menu(s) to provide access to multiple dimension of a key. The quick access bar is off by default, but can be easily turned on and customized to include any dimensions. Select **Setup Quick Access Bar** on the Keys drop-down menu or go to preferences to access these options. In addition, your administrator may configure the quick access bar for you by copying preferences to your user account.

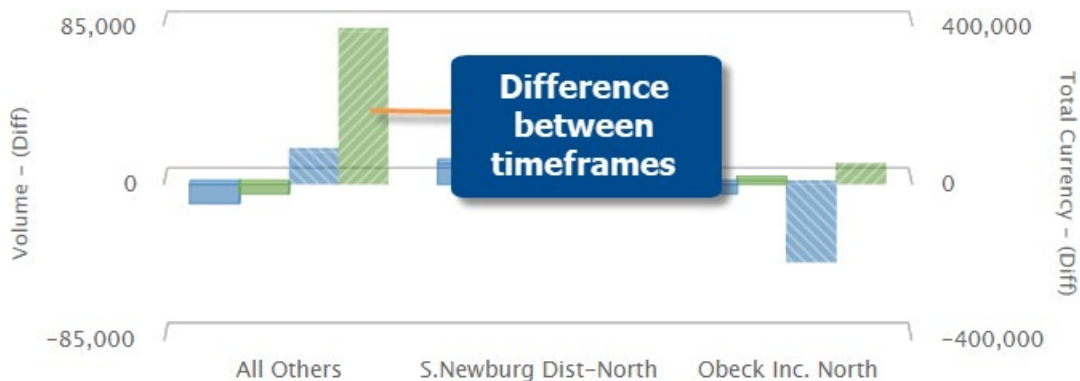


### Graph performance for multiple date ranges

The Multi Comparative bar graph can plot actual values to provide a direct comparison of performance across any number of date ranges and data fields. For example, visualize results for several weeks, months, and years, all in the same view. The date ranges can be completely customized using Multi Comparative data setups.



If the setup includes comparable timeframes during the previous year (i.e. Last), then you can graph the difference for multiple timeframes in this new graph type.



## Highlight totals, averages, and subtotals

Highlighting can be applied to totals, averages, and subtotals (i.e. checked/others) in addition to regular data rows. This new capability makes it easier to identify summary metrics or time periods that fall within or outside the expected ranges. For example, total highlighting points out where overall performance meets expectations; checked highlighting is a visual indicator of performance for custom groupings. You can turn on this capability for any of your saved highlight settings. New highlight settings will have this option turned on by default.

Units	1 Week (Sun)		1 Month		6 Months		Year to Date	
	This	% Chg	This	% Chg	This	% Chg	This	% Chg
⊕ 3rd Party Operators	1,684	🔴 -53.95	15,676	🟢 30.85	99,015	🟢 35.20	167,385	🟢 57.05
⊕ All Othr On Premise	228	🟢 45.22	725	🔴 -7.53	8,409	🔴 -26.22	13,060	🔴 -20.52
⊕ ✓ Bars / Taverns	313	🔴 -2.80	1,196	🟢 3.91	7,641	🟡 -0.27	13,432	🟡 1.20
⊕ Beverage Centers	1,706	🔴 -18.61	5,921	🟢 3.14	42,449	🟡 1.42	70,131	🟡 1.16
⊕ Churches	25	🔴 -64.79	170	🔴 -23.08	1,513	🟡 0.13	2,371	🟡 -1.98
⊕ ✓ Clubs	223	🟢 16.75	1,079	🟢 14.91	6,146	🔴 -6.41	10,211	🔴 -4.89
Checked (2)	536	🟢 4.48	2,275	🟢 8.85	13,787	🔴 -3.11	23,643	🟡 -1.52
All Others (32)	50,261	🟡 0.17	260,137	🟢 16.13	1,682,995	🟢 7.19	2,818,723	🟢 13.10
Totals	50,797	🟡 0.21	262,412	🟢 16.06	1,696,782	🟢 7.09	2,842,366	🟢 12.96



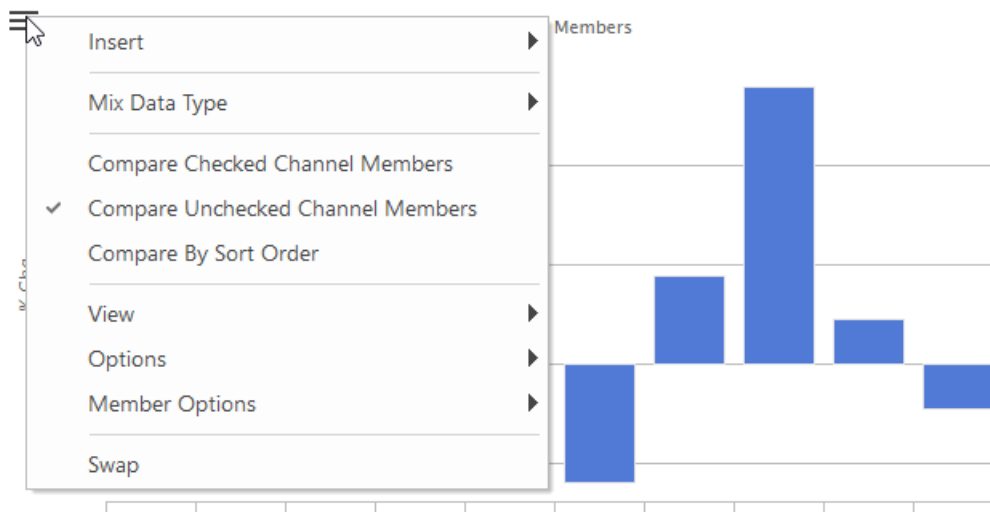
## HTML pages with highlighted data

HTML pages that are created by exporting, printing, and running macros, can now include highlighting if the settings have been applied in SIM.

<b>Kanaan, Tony</b>	16,431 ✓	12,049 ✓	4,382	36.37 ↑
<b>Gridley, Memo</b>	14,102 ✓	14,989 ✓	-887	-5.92 —
<b>Office-Lasoski</b>	13,811 ✓	8,733	5,078	58.15 ↑
<b>da Matta, Cristian</b>	12,643 ✓	7,995	4,648	58.14 ↑
<b>Tagliani, Alexander</b>	11,124 ✓	7,480	3,644	48.72 ↑
<b>Blundell, Mark</b>	10,368 ✓	8,406	1,962	23.34 ↑
<b>Fittipaldi, Christia</b>	8,577	9,930	-1,353	-13.63 ↓
<b>Servia, Oriol</b>	7,834	6,995	839	11.99 ↑

## More options for picking items to graph

As in previous versions, you can select members using the checkmark tool, and then graph only the "checked" members to narrow down on your preferred subset of the data. Now, you can also graph the "unchecked" members in several chart types. For example, you might want to remove just a few items from the graph; simply checkmark those items and then graph the unchecked members.



## Performance improvements

### Faster login

This version loads information on an as-needed basis to provide significantly faster login times on large datasets.

## More efficient processing of global user data

SIM will now refresh global user data, such as bookmarks, setups, collections, etc., by user data category rather than all at once to improve performance in datasets with multiple categories.

## Version 7.50

### Performance improvements in user data

Version 7.50 includes an efficient new option for storing and retrieving user data (bookmarks, collections, etc.). If configured, this enhancement provides the following:

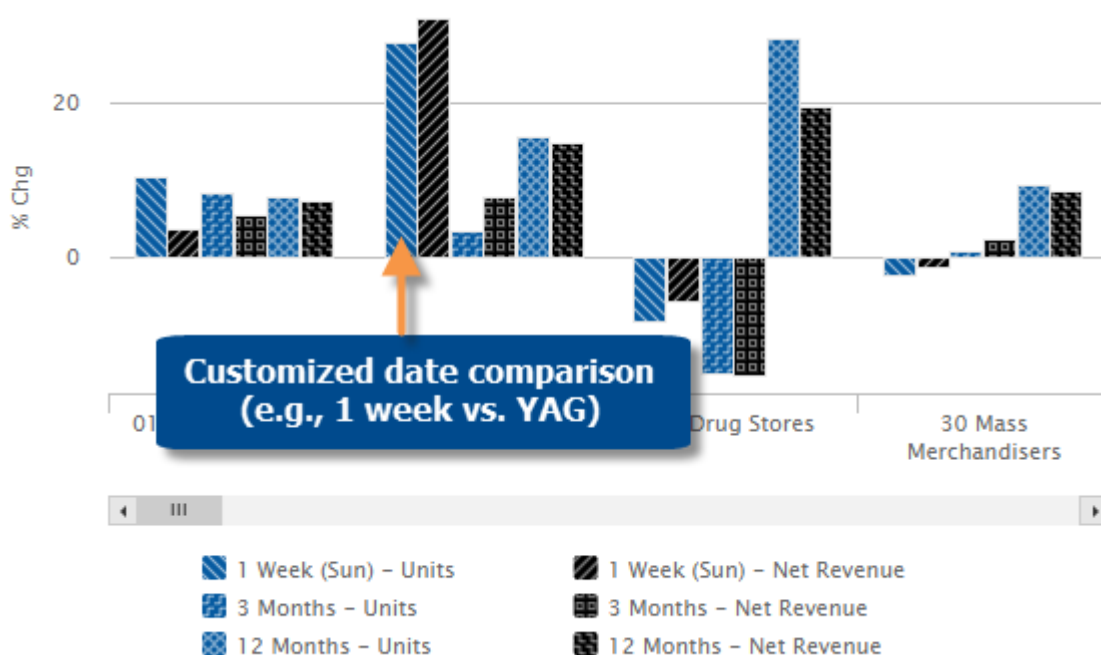
- Significantly improved login times in configurations with many users and/or large amounts of user data
- Automatic refresh of user data
- Better management of user data when load balancing

*How it works:* A user data service stores the user data efficiently by segregating it into metadata and corresponding user data components. SIM and other Salient client applications can then load data on an as-needed basis to achieve optimized response times. Additional installation and configuration are required.

The traditional user data option is still available if your organization does not wish to utilize the user data service.

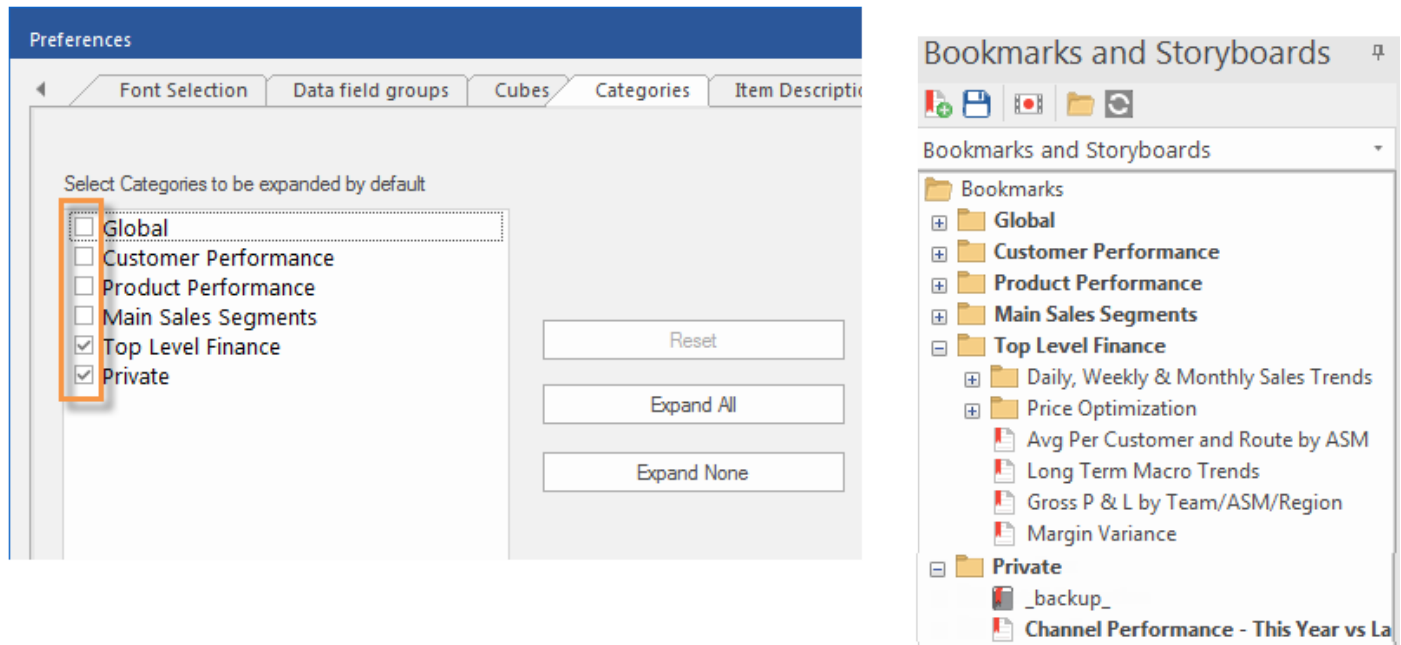
## Visualize and compare multiple date ranges

The new Multi Comparative bar graph shows variance for any number of date comparisons and metrics. For example, visualize short-, mid-, and long-term results compared to the same time last year. The date ranges can be completely customized. Compare any combination of days, weeks, months, or periods to any other dates or budgeted goals. Like the Multi Comparative table, this graph is based on column setups that you can save and share with other users.

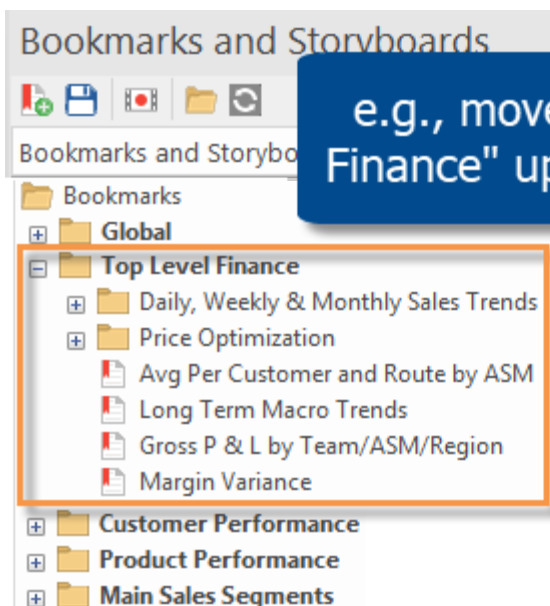


## Choose which categories are important to you

This version provides more control over user data categories, which organize bookmarks, storyboards, collections, and other user data into folders. Using new preferences, you can choose which categories are expanded or collapsed when you open the bookmarks panel and various dialogs in SIM. This enhancement allows you to simplify the screen while keeping commonly-used components easily accessible.

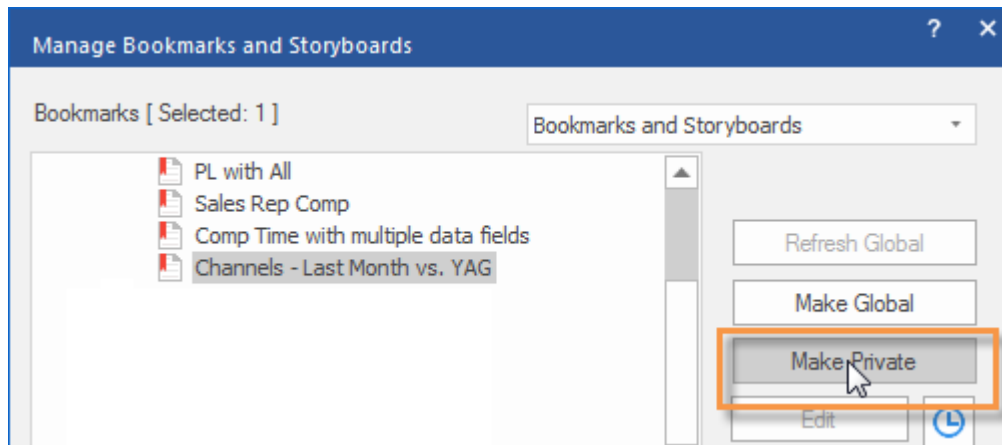


In addition, administrators can reorder user data categories to put the most important categories at the top. Reordering is done in the Administrator's Utility; the custom order will then be visible in SIM.



## Create private copies of bookmarks and storyboards

You can easily create your own private copies of global bookmarks and storyboards. For example, create a private copy of a bookmark and then customize it for your own unique purposes.



## Enhancements for data investigation

This version makes it easier to investigate the data using the checkmark tool. Check the items you are interested in, and then drill, filter, or list, using new options in the contextual shortcut bar and filter menu. Just point and click to access these shortcuts.

**Filter on checked/unchecked**

- Checked...
- Exclude Checked...
- Unchecked...

**Drill on checked/unchecked**

- Drill - Selected
- Drill - Checked (4)
- Drill - Exclude Checked
- Drill - Unchecked (83)

**Key list for checked/unchecked**

- List Tonic Water
- List all Product
- List Product - Checked...
- List Product - Exclude Checked...
- List Product - Unchecked...

Total Brand: 87		
+ Our New		
+ Hires R		
+ Orange		
+ ✓ Seven-Up	10,399	8,537
+ Diet SevenUn	3,266	2,659
+ ✓ Ginger		
+ ✓ Tonic Water	424	295
+ Dry Grape	263	358
+ ✓ Club Soda	188	138

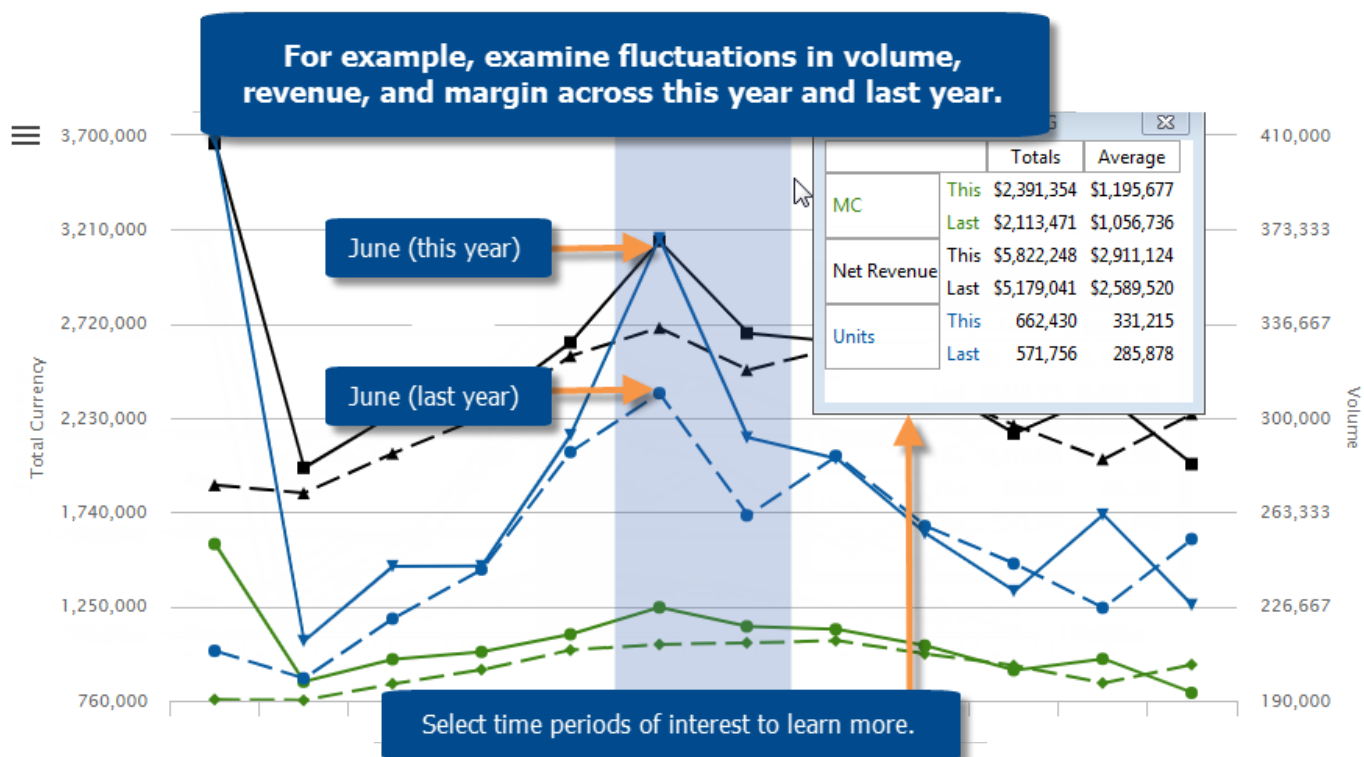
**Drill** **List** **Filter**

Checked (4)	14,813	13,440
All Others (83)	247,599	212,651
Totals	262,412	226,091

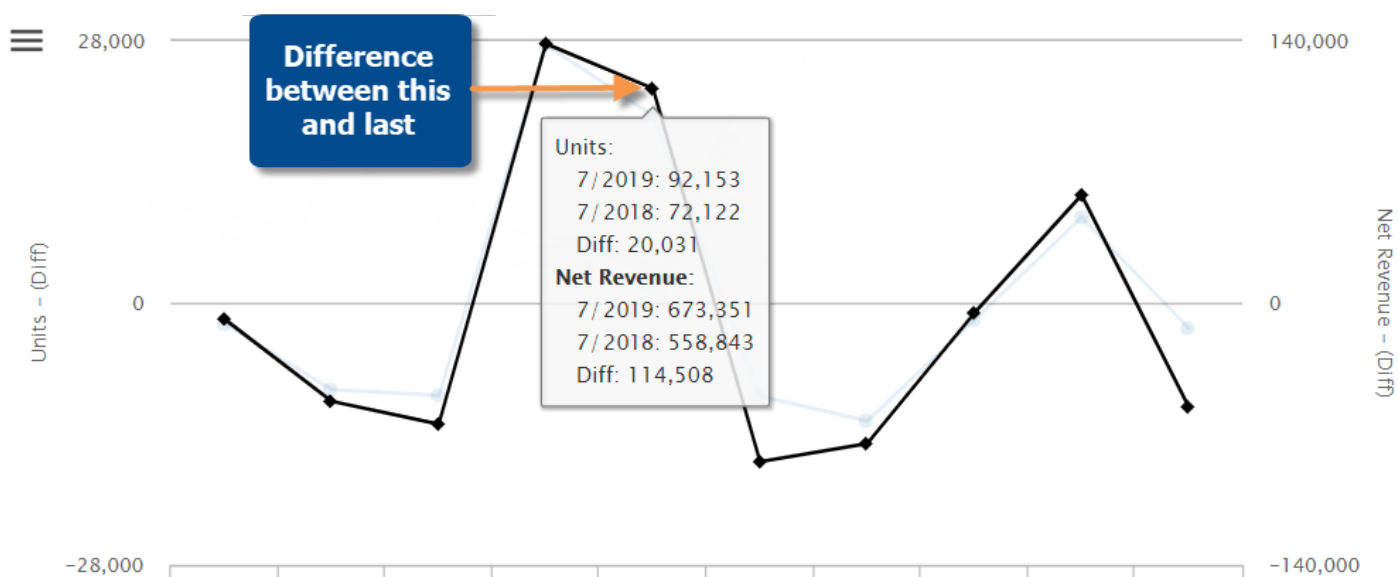
In addition, the subtotal rows provide new shortcuts for investigating checked or unchecked members. Just click in the row to access these options.

## More options for comparing performance over time

You can graph values for multiple data fields across two different time periods in a Comparative Time Series graph. This type of graph was previously limited to a single data field at a time (e.g., sales volume only). You can now graph up to four different families of data (e.g., volume, total currency, unit currency, etc.) with each containing multiple data fields.



In Comparative Time Series graphs that show difference between values, you can see the difference between corresponding dates (this versus last) for multiple data fields at once.

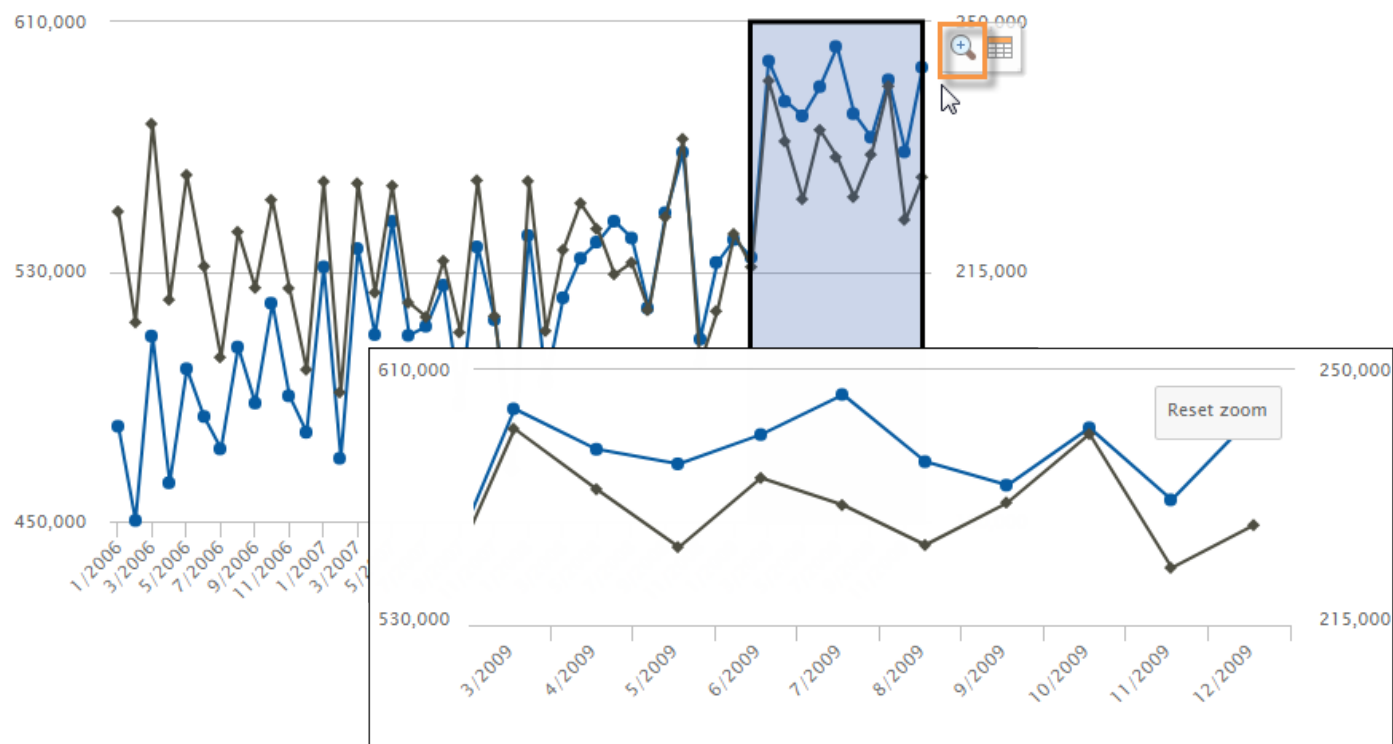


Using the same options available for Trend graphs, you can choose where to place each data family (e.g., volume, total currency, unit currency, etc.)—along the left or right axis (up to two families per axis)—or use a split pane option.




## Zoom in on dates that interest you

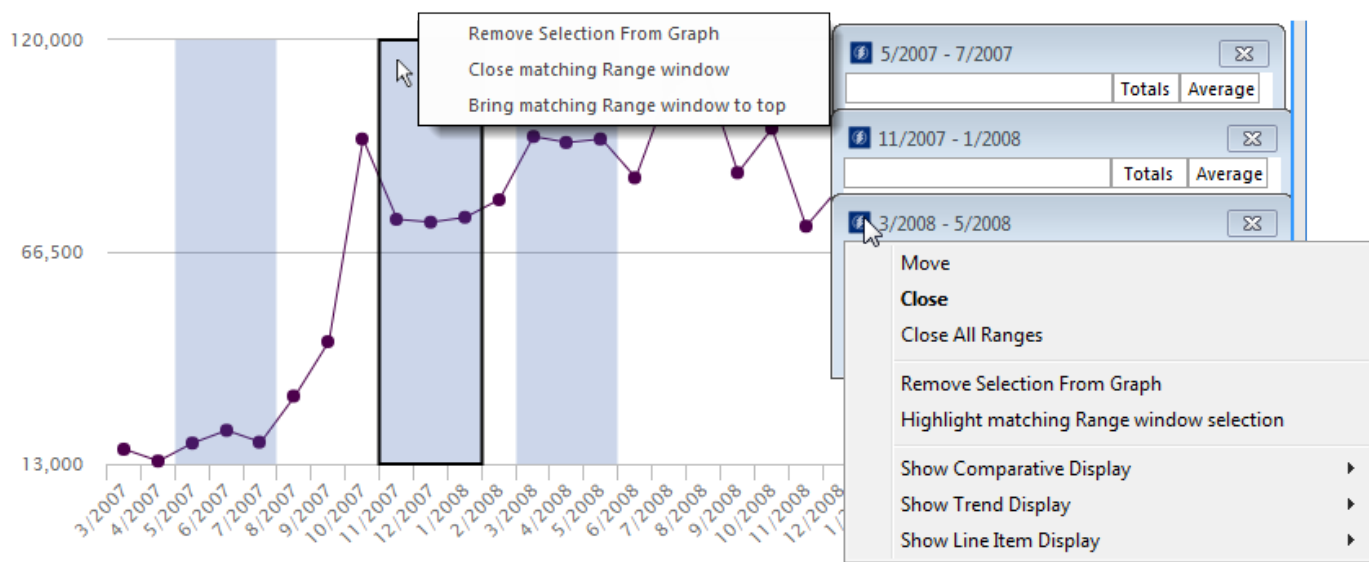
In performance trends, you can zoom in on a subset of the date range (e.g., a few weeks or months). Simply click and drag on the dates; then click the zoom button. For example, look at performance trends across multiple years and then zoom in on a time period of interest. This new feature is available in Normal Trend, Comparative Time Series, and Share Trend analyses.




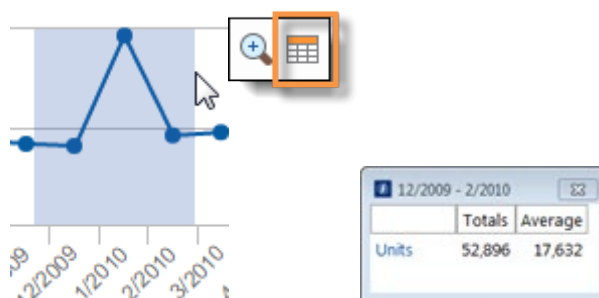
## Better control of date range windows

This version includes enhancements for managing date range windows, which show the details for subsets of the date range (e.g., a few weeks or months out of a longer time period). To access these options, click on  at the top of the range window or click on the range in the graph.

- Each selected timeframe remains shaded in the graph to provide a visual indicator of the dates you are viewing. You can optionally turn the shading off (Remove Selection From Graph) to simplify the graph while leaving the date range window open.
- For any range window, highlight any corresponding date range in the graph to quickly identify it.
- For any date range in the graph, bring the corresponding date range window to the front.



Because zooming is available in this version, the procedure for opening date range windows is slightly different. Click and drag (i.e., rubber-band) across the desired dates and then click the  button in the shortcut bar.

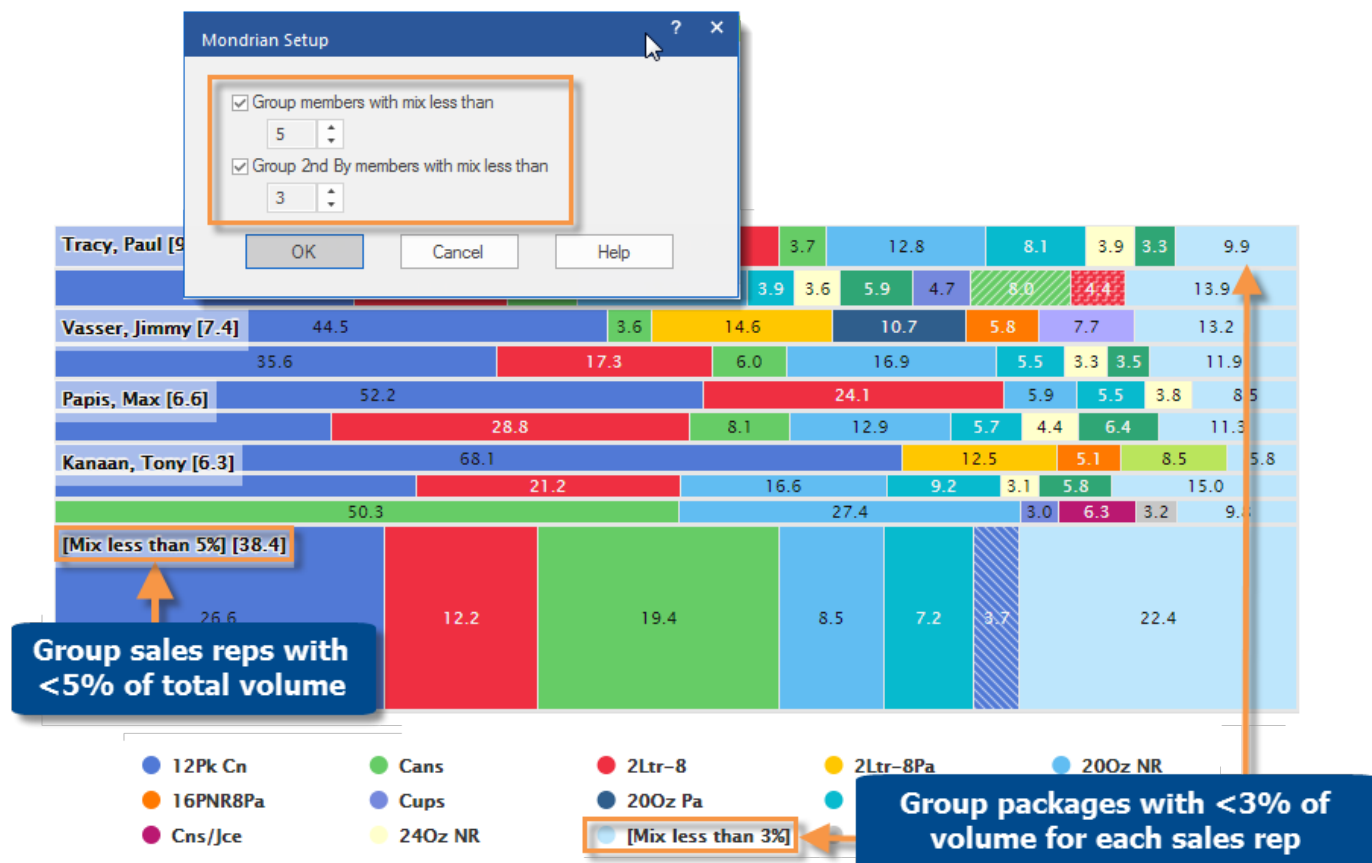




## Two-way graph enhancements

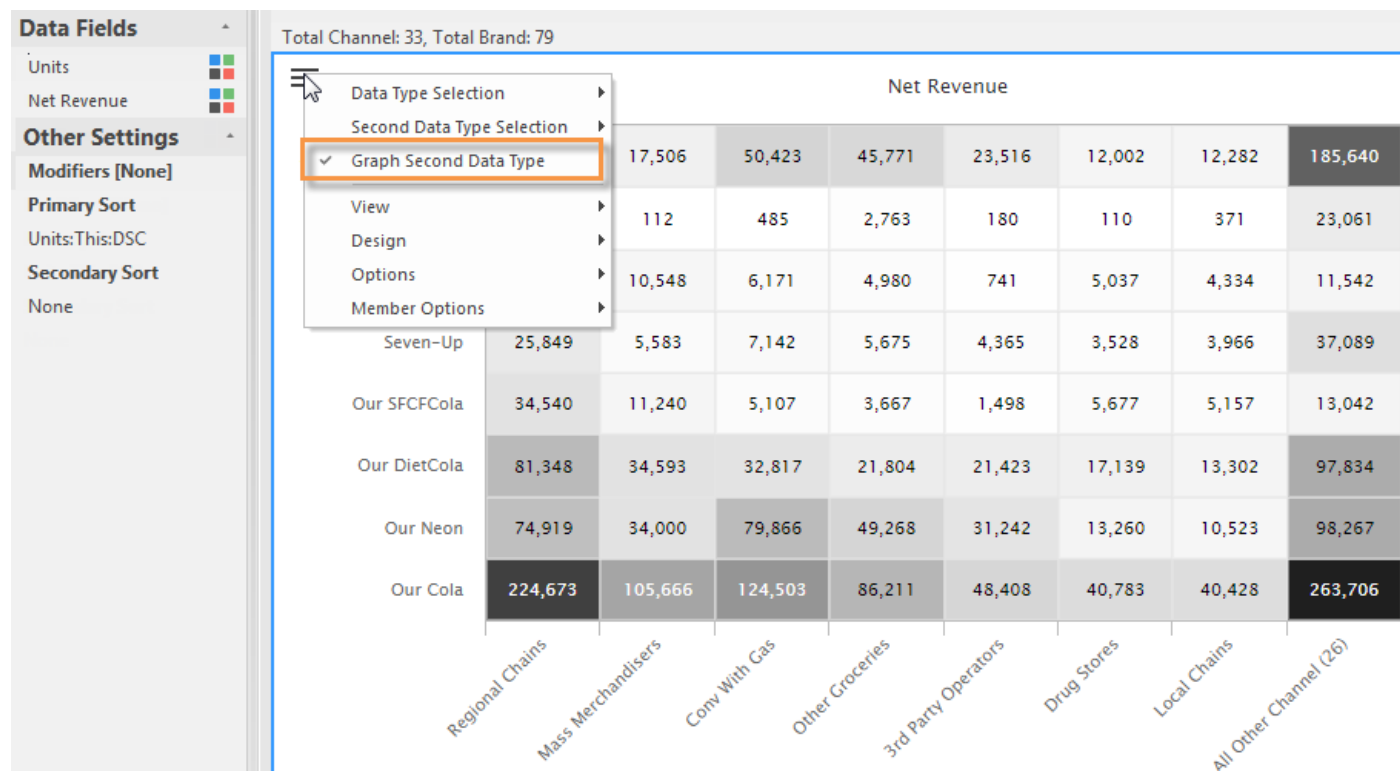
### Fine-tune groupings of data

DeltaMap and Mondrian charts, which show data by two different attributes at once, have improved settings for grouping the less significant members together to simplify graphs. In this version, you can choose different thresholds for the 1st By and 2nd By attributes (e.g., 5% for the 1st By and 3% for the 2nd By). You can change these settings as needed to create customized visualizations of decision-support intelligence.



## Easier data selection in two-way graphs

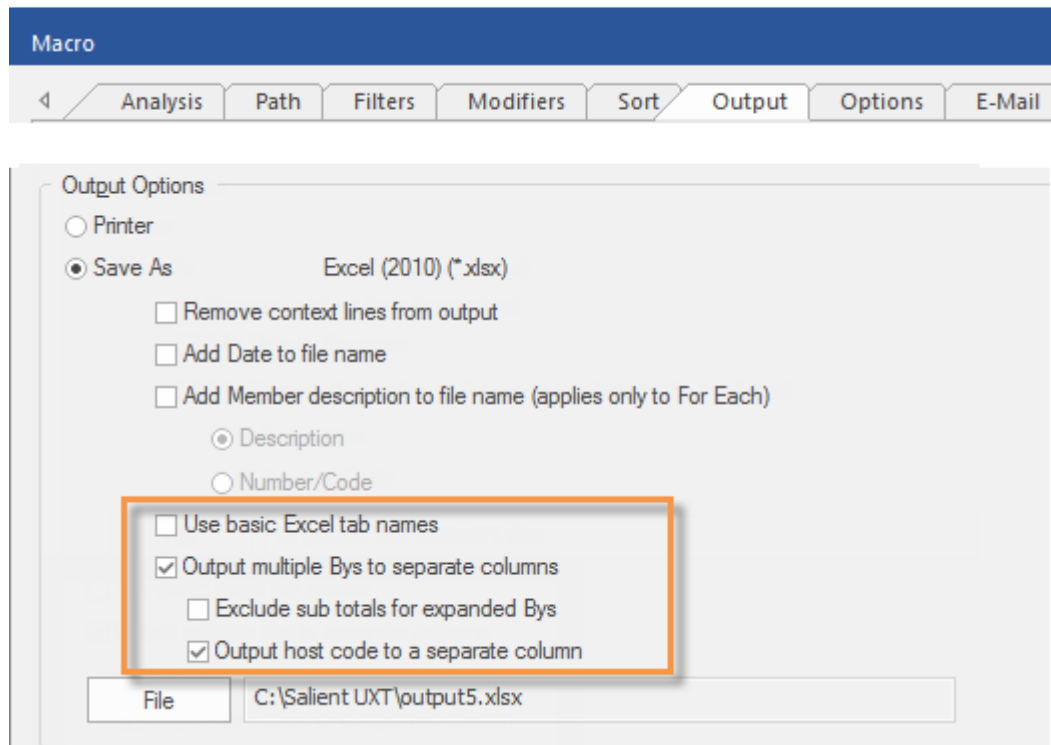
You can toggle between two different data fields in Crosstab graphs. Simply add the data fields and then choose which one to show using a new option in the tools menu. This option is available across several different graph formats, including Heatmap, Side-by-Side Bar, Stacked Bar, Mondrian, and more.



## More options for Excel files

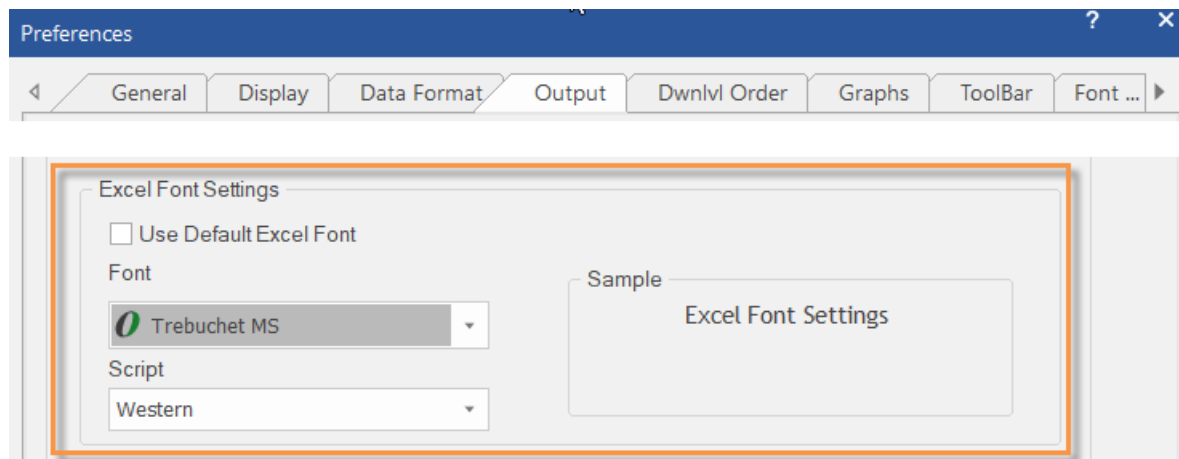
### Unique settings for automated reporting

More settings can be applied on a per macro basis to meet all your data reporting and analysis needs. For example, include subtotals in some spreadsheets and omit them from others. In previous versions, these settings were applied globally across all macros.



### Excel font selection

You can choose the font and script to be used in Excel files. This new preference affects all Excel files created by SIM, including ad-hoc export (i.e. Save As) and macros.



## Improved output of host codes

In spreadsheets of key lists (e.g., customer lists), you can output separate columns for dimension host codes to help classify the data in the resulting files. To use this capability, the key list must include one or more dimensions with codes turned on as a prefix or suffix, and the "Output host code to a separate column" setting must be turned on—either in output preferences for ad-hoc exporting or macro output for automated reporting.

	CustName	Channel host code	Channel	This	Last
00442	B.ENGLISH CO.#342/3570/540490	30	Mass Merchandisers	116	145
00443	B. ENGLISH CO. 4601/540940V	40	Department Stores	42	0
00444	B. ENGLISH CO. # 4601	40	Department Stores	4	0

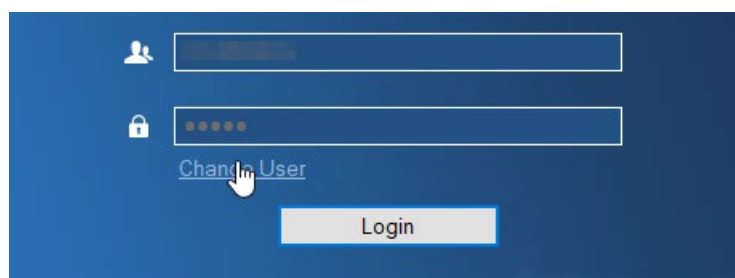
## More authentication options

### External/SSO authentication

This version supports external/SSO authentication using the new Salient Authentication Service and an external Identity Provider (IdP). In this configuration, SIM and other Salient client applications can authenticate users based on credentials from another system. This authentication method requires additional installation and configuration, including the Salient user data service.

### Flexible login for LDAP users

In LDAP configurations (i.e., authentication based on machine login), a new option allows you to change the user account for SIM login. For example, enter your own SIM credentials on a shared machine. To access this new option, select **Change User** in the login screen.



## Custom reporting (BETA)

Custom reports can be built into your solution by Salient to address specific business needs. For more information, contact your Salient sales representative.

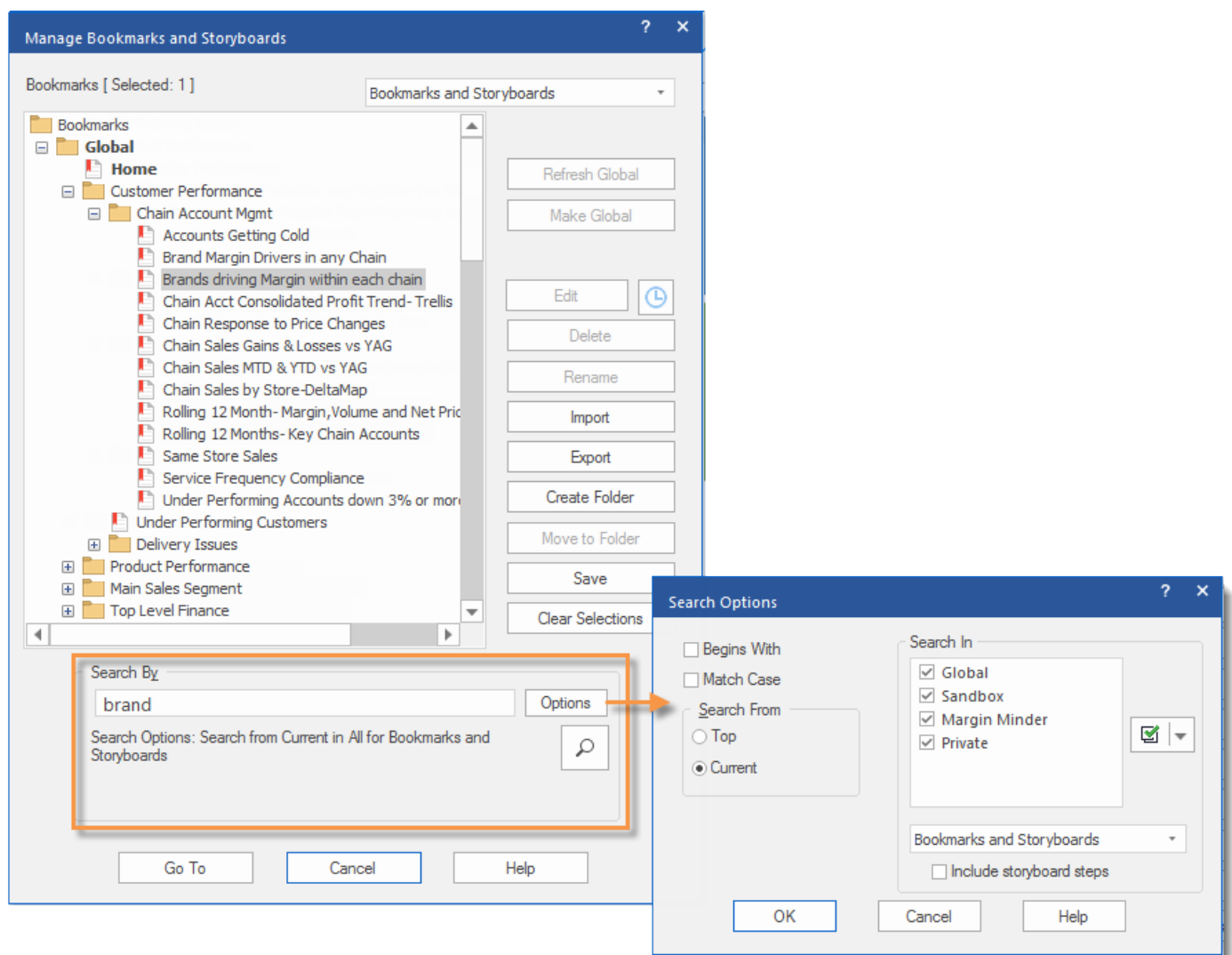
# Version 7.01

## French language option (in 7.01 SP2+)

The SIM interface is now available in French (Canada). The SIM language is set during SIM installation. Note that the dataset language is configured separately.

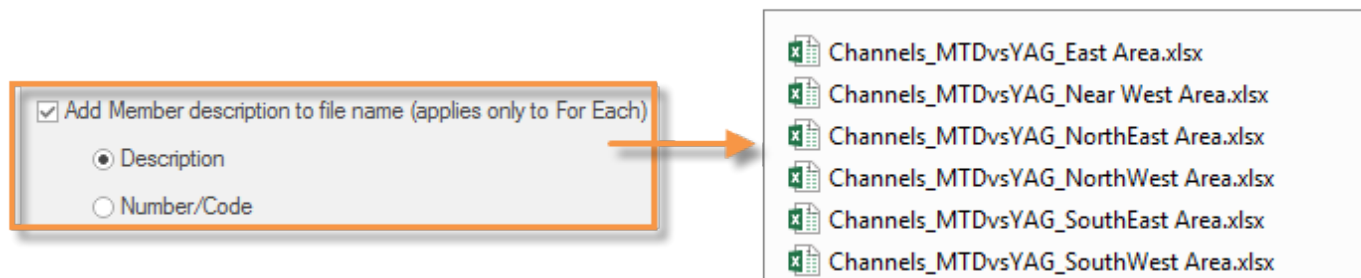
## Find information faster

You can now search for bookmarks, storyboards, and macros, to quickly find the information you want. To search, open the management dialog, enter some or all of the name, and then click the search button. Advanced options let you choose exactly what and how to search: limit the search by category or location; search from the top or current; match case, and other options. For bookmarks and storyboards, the search is located at the bottom of the Manage Bookmarks and Storyboards dialog. For macros, the search is in the Manage Macros area.



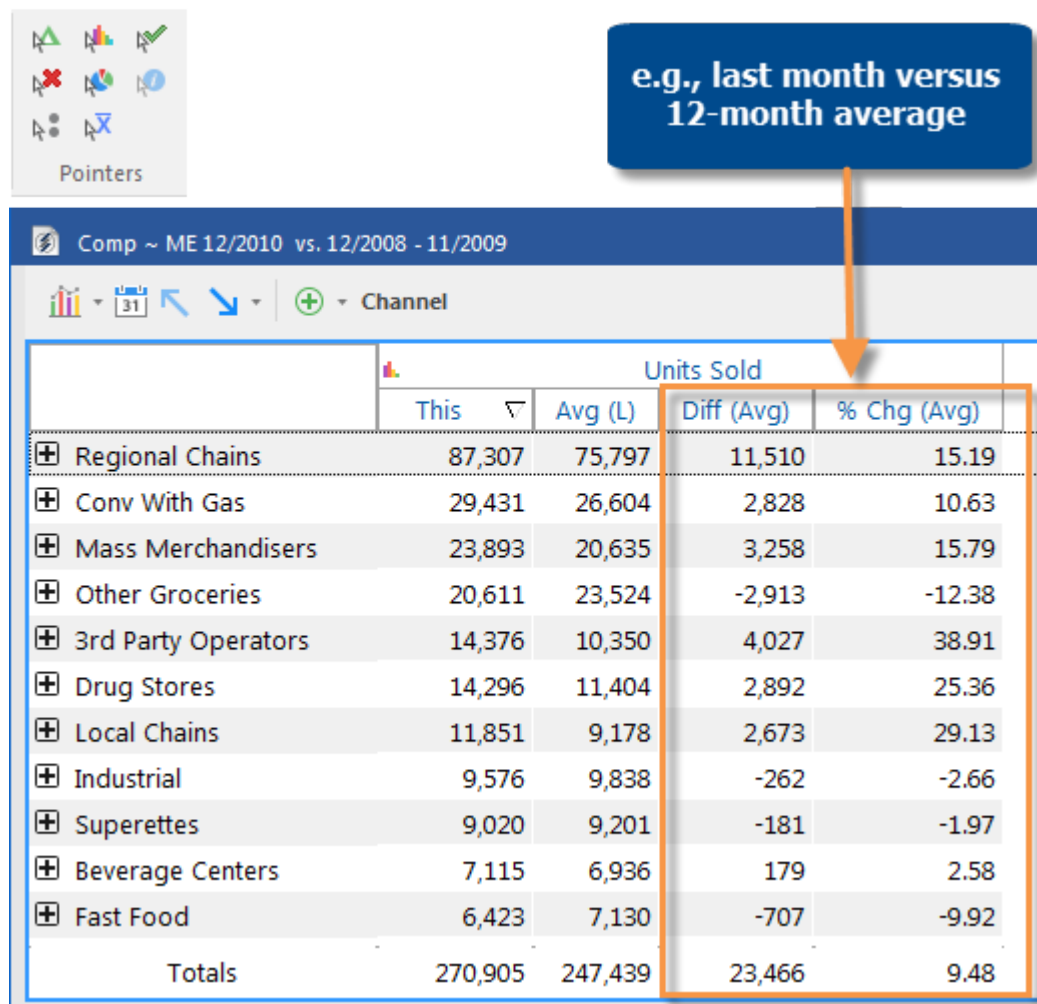
## Better control over automated reporting

Macros include a new option to create separate files when outputting results "for each" member. When this option is on, each file includes results for a member; the file name includes either the member description or number/code. This feature is available at the key list or dimension level. For example, create a set of reports showing sales by channel for each region or a package listing for each customer. The resulting files can be saved or emailed depending on your preferences.



## Compare any single time period to average performance

You can add average per period and variance columns when comparing a single date to a multiple-date range; therefore, you can compare a specific time period to average performance (e.g., monthly or weekly averages). This enhancement allows you to see how much better or worse any area of the organization is doing than usual. These calculations are available in Comparative and P&L analyses.

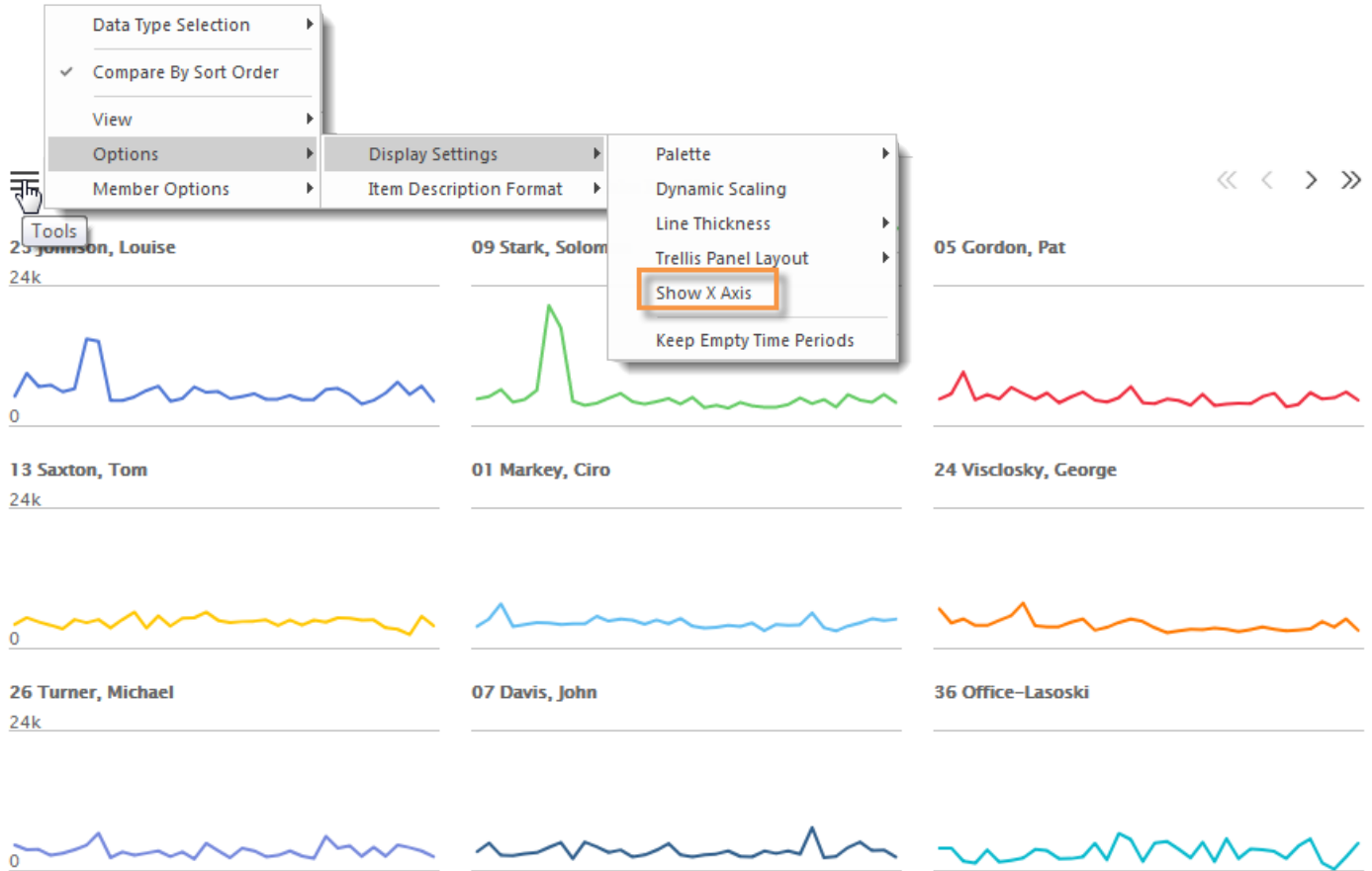


## Improved change management

Collections, bookmarks, and other user data are preserved in the event of a change in host code length. If this type of change occurs, then SIM uses the same logic as Acquire to truncate or lengthen the host codes, so that the user data matches the host codes on the server. For example, if customer codes increase in size, then any collections, bookmarks, etc., that use the previous codes will be padded to match the codes on the server and, therefore, will still be valid. If duplicates are encountered, they will be removed from the user data component.

## Simplified Trellis graphs

The date labels in Trellis graphs are now turned off by default to simplify the view and fit more data on the screen. This enhancement can also improve the appearance of print-outs. If you wish, you can turn the labels back on using a new option in the tools menu.

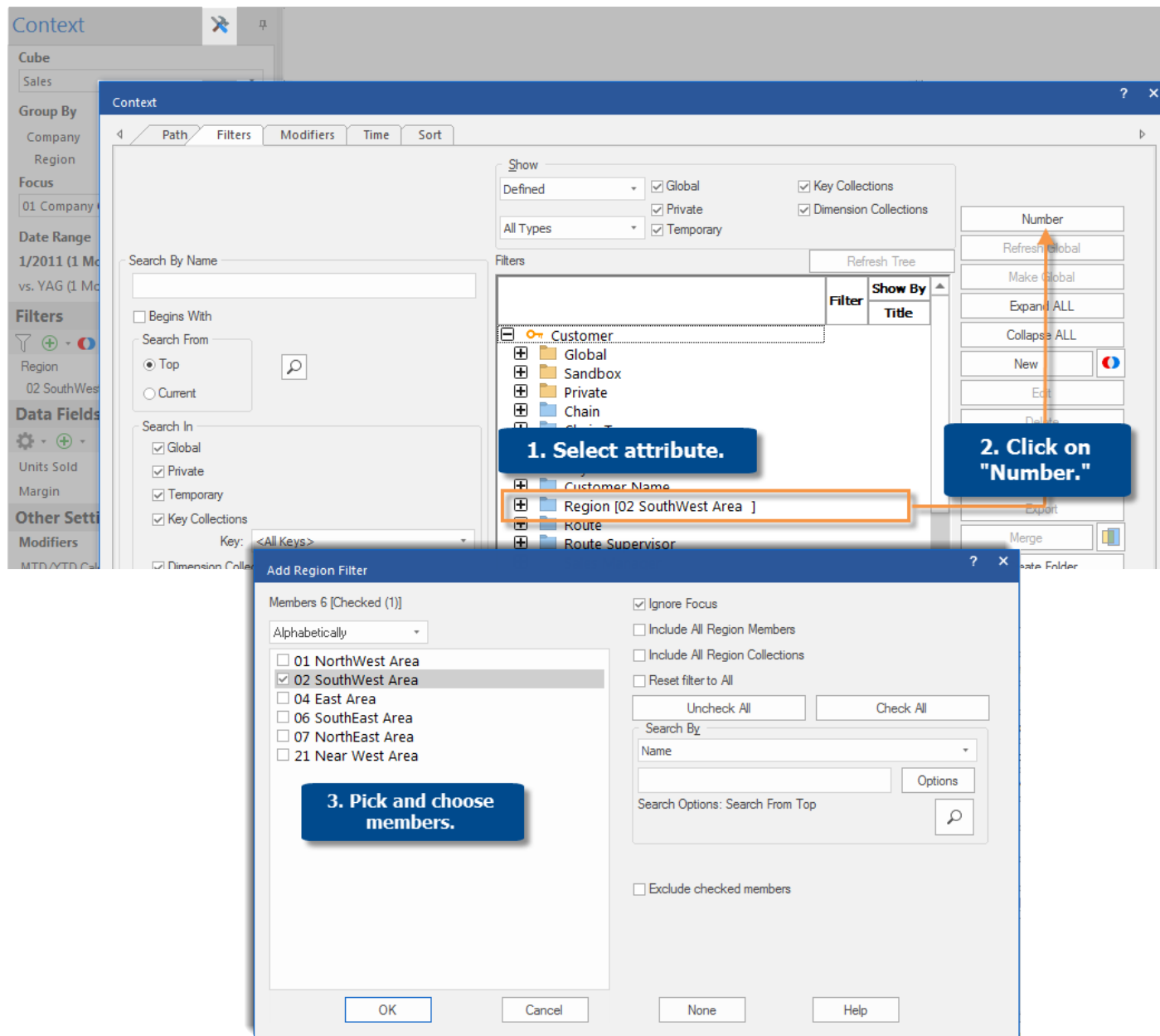




## Streamlined options for managing filters

The filters tab provides comprehensive options for viewing and applying filters, including the ability to select a single dimension member (e.g., region, brand, sales rep, etc.). No collection is required. The filters tab (under context or macros) shows these types of filters in brackets to provide a more complete snapshot of where you are in the data.

To turn on a filter for a single dimension member, just select the dimension (i.e., attribute) and then click the Number button, just like you would for single key member. The next dialog lets you select a single member, pick and choose multiple members, change members, or turn the filter off. (A temporary collection is created if you choose multiple members.) The same flexible options, including search capabilities, "exclude" others, and reset to all, are available for filters created using this new method.



## Near-real-time data updates

This version allows data to be updated in "near-real-time" without disconnecting users from SIM and Salient Dashboards. This capability was previously available as a BETA feature but is more robust in this version. Data updates can happen during the day or any other time with minimal interruptions to users, therefore, providing users with the most current information available. During the data update, a message notifies users that the server has gone into "suspended state" and an indicator displays at the bottom of the SIM screen. Users can continue to view the data that has already been requested and perform tasks that do not require new requests for data, such as highlighting and scrolling (limited in key lists). When the update is finished, users have access to the latest data and can resume normal operations.

Data updates that are performed while users are connected should be limited to incremental data updates of a manageable size. Dataset schema changes and data removal are not supported while the Server is running. These types of updates should be performed when users are not connected, such as during a nightly update. In addition, near-real-time updates are not recommended in a Metaserver environment.

If you wish to perform near-real-time data updates, contact Salient Support for information on setting up this feature. The UXT Server Version 6.00 SP3 or higher is required.

# Version 7.0

## Look and feel

The SIM screen has been updated to include modern, intuitive controls, including a ribbon control and context panel, which provide easy access to SIM's data selection and analysis capabilities.

### Home, forward, & back

The screenshot displays the SIM interface with the following components highlighted:

- File menu:** Located at the top left, containing options like File, Main, Analyses, View, and Help.
- Ribbon control:** A horizontal bar at the top right containing various analysis and view options such as Table, % Change Bar Chart, Actual Value Bar Chart, and Window.
- Context panel:** A vertical panel on the left side containing sections for Cube, Group By, Focus, Filters, Data Fields, Other Settings, and Modifiers.
- Analysis window:** The main central area displaying a table of data for 'Comp ~ ME 7/2009 - 12/2010 vs. YAG'.

	Units Sold				Margin		
	This	Last	Diff	% Chg	This	Last	Diff
Wholesale Clubs	39,275	15,576	23,699	152.15	\$145,299	\$41,474	\$103,825
Department Stores	31,138	23,398	7,740	33.08	\$199,684	\$114,129	\$85,555
Dairy Stores	26,085	21,681	4,404	20.31	\$199,084	\$132,924	\$66,160
All Othr On Premise	25,401	27,729	-2,328	-8.40	\$179,128	\$152,818	\$26,310
Hotels / Motels	24,939	21,413	3,526	16.47	\$151,788	\$106,520	\$45,268
Bars / Taverns	23,730	23,696	34	0.14	\$243,689	\$207,726	\$35,963
Clubs	18,778	18,074	704	3.90	\$158,549	\$135,317	\$23,232
Jails	18,074	18,074	0	0.00	\$122,831	\$92,224	\$30,607
Government Accounts	16,218	16,218	0	0.00	\$128,787	\$128,264	\$523
Garages/ Car Dealers	14,218	13,848	370	2.67	\$107,110	\$86,810	\$20,300
Rgn'l Chns OnPremise	12,422	11,890	532	4.47	\$55,701	\$42,883	\$12,818
S. Newburg Deli	8,547	8,374	173	2.07	\$26,045	\$18,474	\$7,571
S.Newburg FullSrv	2,711	2,700	11	0.41	\$25,240	\$21,633	\$3,607
Obeck Inc. Deli	1,164	816	348	42.65	\$4,416	\$2,776	\$1,640
5G Water	571	375	196	52.27	\$333	\$228	\$105
Premix	433	314	119	37.90	\$4,003	\$2,476	\$1,527
Sales Pr	161	127	34	26.77	\$117	\$73	\$44
120%GrND	1	0	1	100.00	\$0	\$0	\$0

**Tip:** You can optionally minimize the context panel or ribbon control to increase the screen space available for analysis data.

## Streamlined access to context options

The new context panel is a comprehensive access point for customizing nearly any aspect of an analysis. Just click on the analysis window and use the panel to change the By, select the dates, filter, select data fields, and more.

**Context Panel:**

- Cube:** Data cube (Sales)
- Group By:** Channel, Package, Sales N (By and focus)
- Focus:** Conv With Gas
- Date Range:** 1/2011 (1) vs. YAG (1 Month) (Date range)
- Filters:** Brand (Our Cola) (Filters (downlevel, temporary, and collections))
- Data Fields:** Units Sold, Net Revenue, Margin (Data fields)
- Other Settings:** Modifiers (MTD/YTD, Calendar), Primary Sort (Name:ASC), Secondary Sort (Sort and modifiers)

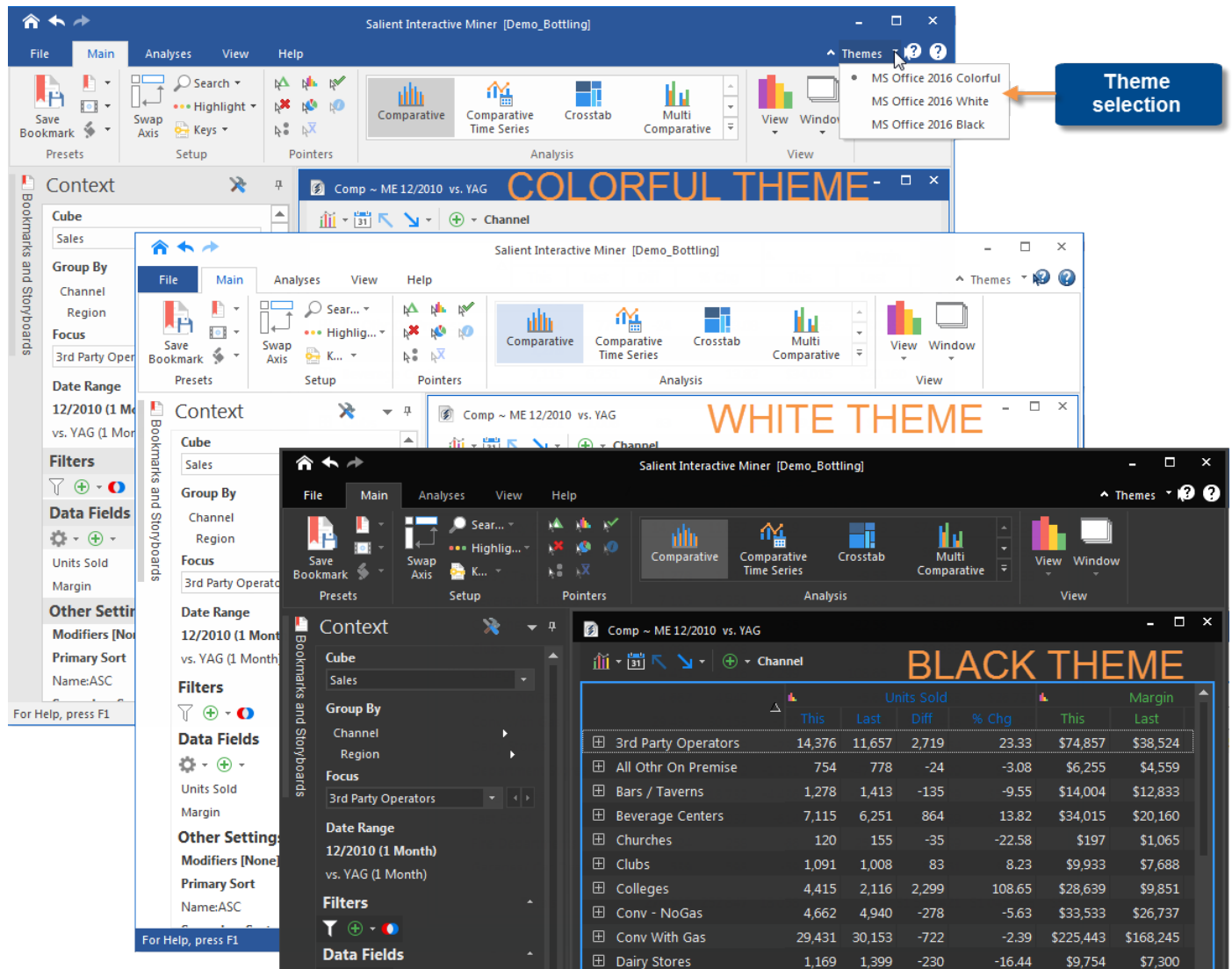
**Analysis Window:** Comp ~ ME 1/2011 vs. YAG

	This	Last				
Conv With Gas	9,122	12,732	-3,610	-28.35	\$96,329	\$127,998
10Oz ND	3	150.00	\$48	\$19		
10Oz Pa	52	46.43	\$994	\$1,113		
12Pk Cn	2,880	2,756	124	4.50	\$17,841	\$18,840
12PkCnND	182	180	2	1.11	\$1,788	\$1,889
12PKCnPa	-402	-61.66	\$2,371	\$5,317		
16 IsoPa	-108	-20.15	\$6,805	\$8,037		
16 Oz ND	1,891	2,250	-359	-15.96	\$30,051	\$33,834
16MstJce	14	6	8	133.33	\$546	\$234
16OzFWPa	35	36	-1	-2.78	\$1,241	\$1,244
16PNR8	1,099	3,284	-2,185	-66.53	\$10,173	\$27,100
16Tea12	476	544	-68	-12.50	\$3,339	\$3,933
1G Syrup	0	626	-626	-100.00	\$0	\$4,935
1Ltr15ND	0	2	-2	-100.00	\$0	\$26
2Ltr-8	33	152	-119	-78.29	\$343	\$1,460
2Ltr-8Pa	1	0	1	100.00	\$10	\$0
32OzNRPa	0	324	-324	-100.00	\$0	\$3,275
3GBibLcl	172	132	40	30.30	\$2,363	\$1,862
3GBibNat	1,240	862	378	43.85	\$15,161	\$11,574
5gBibLcl	1	2	-1	-50.00	\$35	\$68
<b>Totals</b>	<b>62,720</b>	<b>103,698</b>	<b>-40,978</b>	<b>-39.52</b>	<b>\$589,529</b>	<b>\$932,090</b>

**Tip:** This button opens the Context dialog, which lets you change nearly any aspect of the analysis.

# Themes

New themes let you change the color scheme to with the click of the button. This may reduce eye strain for some users.



## Simplified analysis toolbar and path


The toolbar (previously called the context bar) at the top of each analysis window is simplified to save screen space and provide important data selection tools.

The screenshot shows the SIM analysis toolbar and a data table. Callouts point to various functions:

- Date setup**: Points to the date selector (31).
- Drill down**: Points to the drill down arrow.
- Tables/graphs**: Points to the chart icon.
- Graph format**: Points to the graph format icon.
- Uplevel**: Points to the uplevel arrow.
- Add filter**: Points to the filter icon.
- Group by or focus**: Points to the 'Region' dropdown.

The data table shows 'Units Sold' for various areas:

	This	Last	Diff	% Chg	This
SouthEast Area	66,844	88,442	-21,598	-32.31	\$297,06
SouthWest Area	40,085	56,164	-16,079	-28.63	\$257,38
East Area	36,941	50,624	-13,683	-27.03	\$204,58
NorthWest Area	32,800	52,182	-19,382	-37.14	\$228,86
Near West Area	13,269	21,428	-8,159	-38.08	\$93,75
NorthEast Area	305	112	193	172.32	\$1,99

As in previous versions, you can view and change the current drill path using this toolbar. A filter button  in this version shows if any additional filters are applied and lets you change those filters.

The screenshot shows the SIM analysis toolbar and a data table. Callouts point to various functions:

- Downlevel filters**: Points to the filter icon. Sub-points:
  - Double-click to remove
  - Click to edit
- Other filters (e.g. collections)**: Points to the filter icon. Sub-point:
  - Click to edit
- Group By or Focus**: Points to the 'City' dropdown. Sub-point:
  - Click to edit

The data table shows 'Units Sold' and 'Margin' for various locations:

	This	Last	Diff	% Chg	This	Last	Diff	% Chg
CORTLAND	6,6	5,4	1,2	22.22	\$40,469	\$35,008	\$5,461	15.60
ITHACA	5,4	4,2	1,2	28.57	\$9,599	\$17,401	(\$7,802)	-44.84
FREEVILLE	1,2	1,2	0	0.00	538	\$6,772	(\$2,233)	-32.99
DRYDEN	1,2	1,2	0	0.00	258	\$6,826	(\$2,567)	-37.60
GROTON	1,2	1,2	0	0.00	258	\$6,826	(\$2,567)	-37.60
MARATHON	449	780	-331	-42.44	\$2,831	\$5,097	(\$2,266)	-44.48

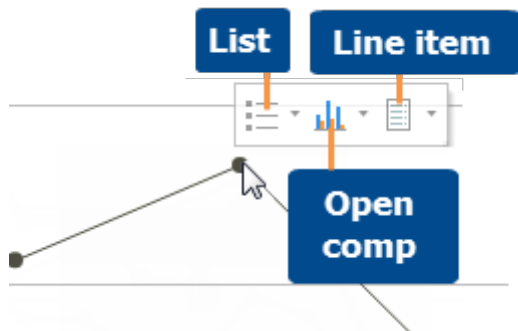
## Contextual shortcuts for faster access to details

A new pop-up toolbar makes it easier to interact with the data by drilling, listing, checking members, and much more, for any item in the view. Click on any row in a table or item in a graph (bar, line, point, etc.) to open the shortcut bar. Then, click on any of the available actions to dig deeper. For example, drill down, list out customers, filter, and more.

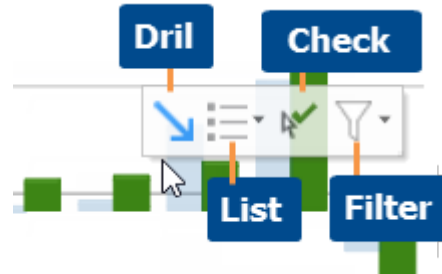
*Comparative table*

	This	Last
NorthWest Area	183,922	182,947
SouthWest Area	183,921	182,947
East Area	175,005	183,475
SouthEast Area	234,391	219,283

*Time-series graph*

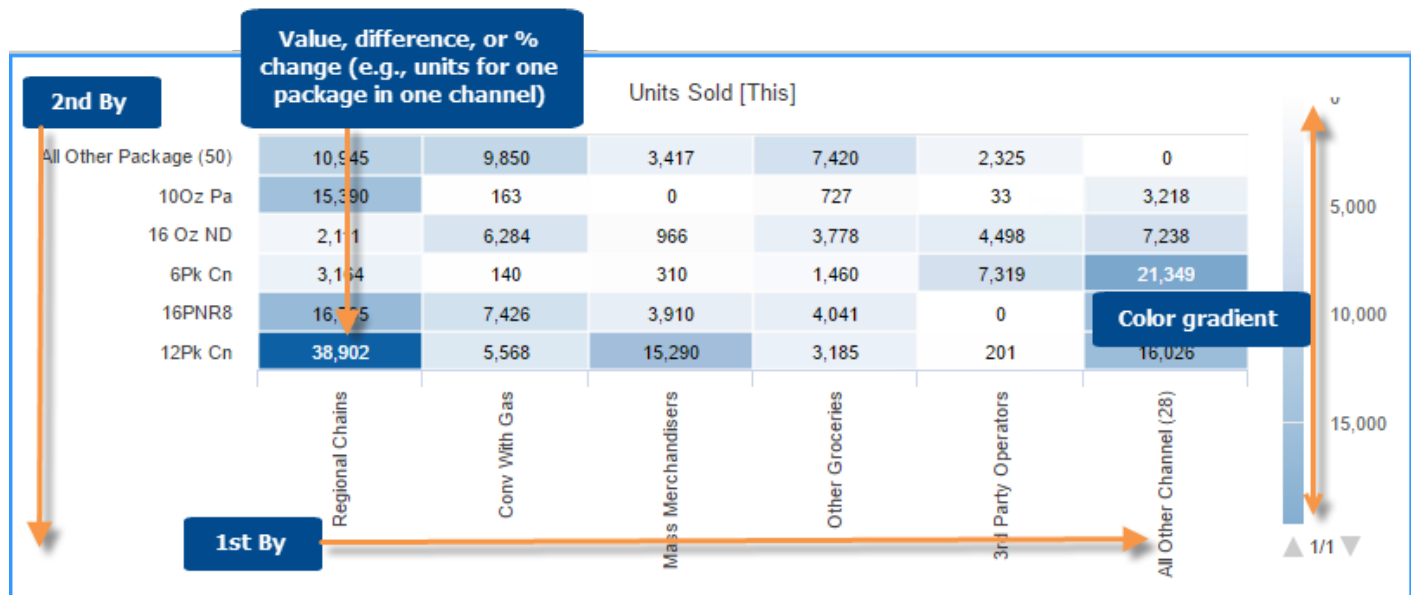


*Comparative graph*



## See it more ways at once

The Heatmap is a new graph type showing a matrix of two attributes (1st By and 2nd By) with the color representing intensity of data. This graph is a format of the Crosstab analysis. For example, spot the best-selling packages for each channel.



## Version 6.20

### Highlighting enhancements

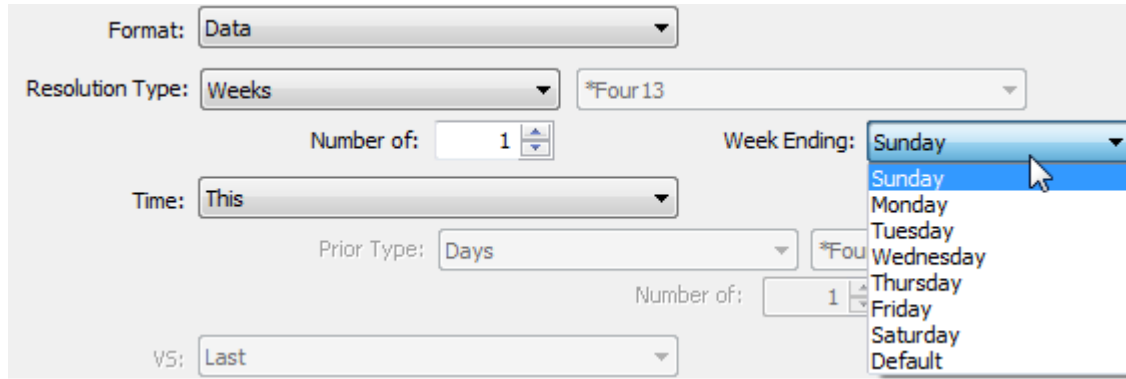
You can independently highlight values, percent change, and difference for a data field. The highlighting only applies to the selected column ( This & Last, Diff, or % Chg) rather than affecting all columns for the data field. This new capability makes it possible to apply multiple highlight settings for a data field and, therefore, spot additional situations where attention may be needed. For example, where is average volume per stop lower than expected and decreasing further?

	Units Sold				
	This	Last	Diff	% Chg	
⊕ Keller, Brad	11,730	9,842	1,888	↑	19.18
⊕ Markey, Ciro	18,594	17,118	1,476	↓	8.62
⊕ Morris, Dutch	9,591	8,097	1,494	↑	18.45
⊕ Office Accounts	1,182	1,514	-332	↓	-21.93
⊕ Office-Ferkel	8,229	9,627	-1,398	↓	-14.52
⊕ Office-Haudenschild	2,196	2,694	-498	↓	-18.49



## Multi Comparative week-ending option

A new option in Multi Comparative data setup lets you control the week ending day for columns that display weekly data. You can select a specific day-of-the-week, in which case the date range will include the full week ending on the selected day-of-the-week that falls on or immediately prior to the date selected by the user. If you prefer, you can select the "default" week ending day to allow the day-of-the-week to be determined by the date that the user selects when viewing the Multi Comparative.



Format: Data

Resolution Type: Weeks \*Four13

Number of: 1

Time: This

Prior Type: Days

Week Ending: Sunday

VS: Last

1 Day This	1 Week (Sun) This	1 Month This	1 Period <Four13> This	Year to Date This
353	826	2,019	2,019	2,019
345	759	2,721	2,721	2,721
297	190	2,774	2,774	2,774
213	576	2,095	2,095	2,095
201	447	2,001	2,001	2,001

## Access to most-recently-used storyboards and macros

You can easily access your most-recently-used storyboards and macros via drop-down menus.

## Fully-customized data access (conditional password collections)

By applying conditions to password collections, administrators can now allow visibility into summary views across the organization while selectively restricting access to details by user. (In previous versions, password collections completely restricted access in all views.) For example, sales representatives might have access to company-wide sales by sales rep, region, manager, etc., without the ability to see other representatives' customers or other details.

# Version 6.01

## Enhanced search

You can now perform an enhanced search to find all members that meet the search criteria. After you enter part or all of the name, code, or description, SIM automatically finds all of the members that contain those characters. Several search options are available, such as match case, search from top, begins with, and more. In the resulting list, you can choose any member to focus on it, or check multiple members to use them as a filter (i.e., remove data for all other members). The search method from previous versions, which finds the "next" member, is still available.

**Search Results**

Members 7 [Checked (2)]

Search Results

<input type="checkbox"/>	Grpfrt-Orange
<input type="checkbox"/>	Orange
<input checked="" type="checkbox"/>	Orange Juice
<input checked="" type="checkbox"/>	Orange Juice
<input type="checkbox"/>	Orange Mango
<input type="checkbox"/>	Our Orange
<input type="checkbox"/>	Tropical Orange

Search By:

Search Options: Search All

☐ Exclude checked members

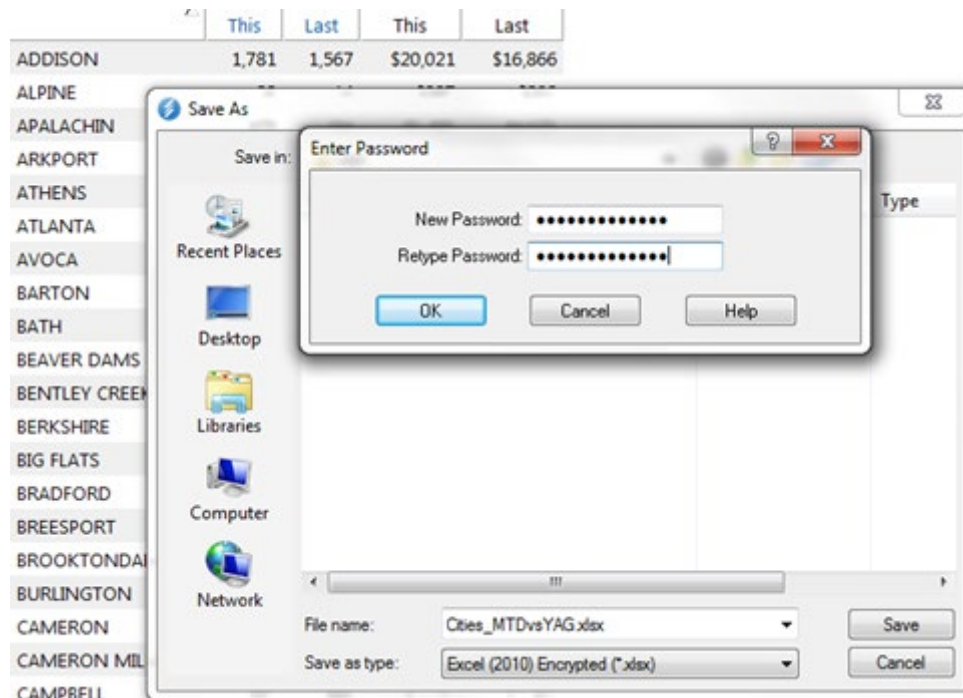
☒ Turn on as Filter

☐ Turn on as Show By Title

You can also use the enhanced search to find the desired members when creating collections, changing the focus, downleveling, and adding filters by entering search criteria in the corresponding dialogs.

## Export security

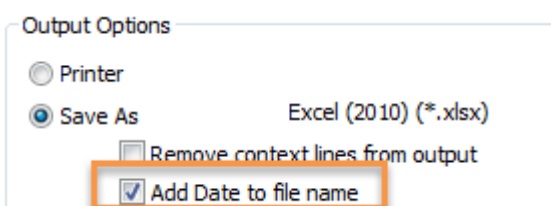
- You can export data in encrypted Excel format to ensure its security by requiring a password to open the file. This new option is available when exporting (Save As) or emailing (Send) in SIM.



- To enhance data security, export options may be limited by user account.

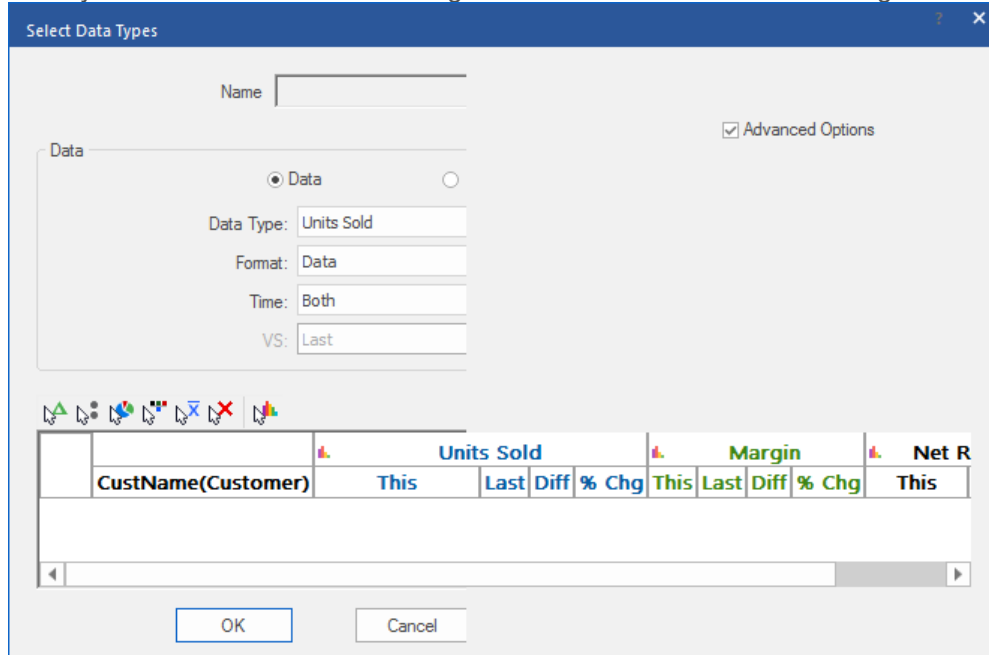
## Ease-of-use enhancements

- A new macro option lets you add the date to the file name when saving or emailing results, therefore, creating unique file names so that results are not overwritten when the macro runs on a regular basis.

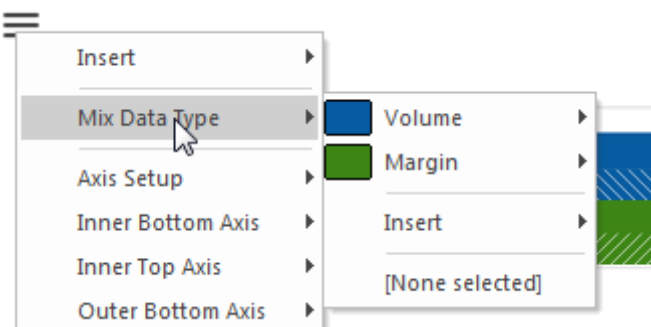


- You can turn off the message that notifies you when the focus is changing because the current focus item was removed. When this message is on, it may appear when you add a filter, change the timeframe, or change the context in other ways.

- You can make changes to an undefined (i.e., unsaved) data setup, such as adding or removing columns, via the Select Data Types dialog without having to save your changes in a named setup. The changes are automatically applied to the current view. This dialog allows you to make nearly any change to the data setup, including adding data fields for either or both timeframes, adding budgets, removing measures, adding difference/percent change, rearranging columns, and more; therefore, this enhancement may be beneficial when you want to make several changes to the current view without saving a new setup.



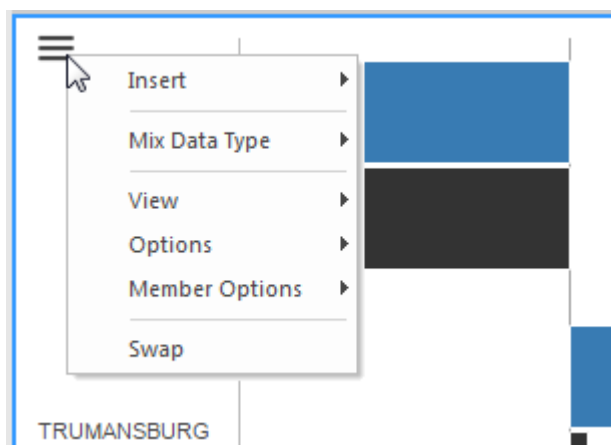
- Comparative Dimension Member graphs include new options for choosing the Mix data field, which shows each member's percent of the total in an extra column or row. New options include:
  - **Insert** lets you select any additive data field, so that options are no longer limited to data fields in the current view. If you "insert" a mix data field, SIM adds it to the corresponding table.
  - **[None selected]** lets you turn off the mix data field, therefore, removing the mix row or column from the graph.



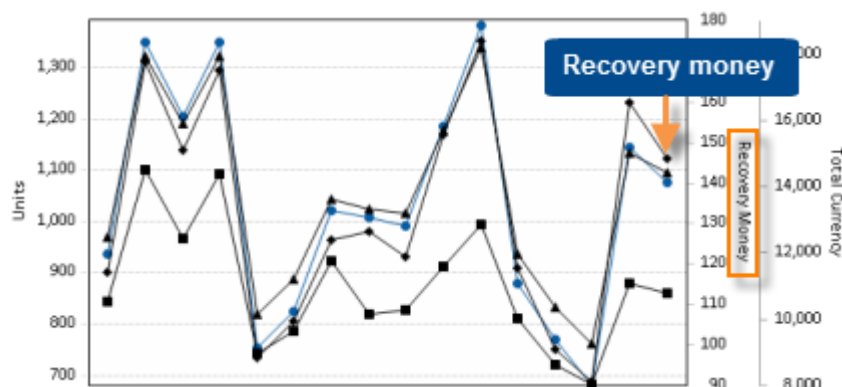
# Version 6.0

## Improved data selection

- A new option makes it easier to change or add data in Comparative Time Series graphs. Previously, you could only select from the data fields marked for graphs in the corresponding table. Now, you can add any available data field using a new insert option.



- In graphs that include multiple axes (Normal Trend and Comparative Dimension Members actual value), a new option allows a single data field to be plotted on a separate axis instead of with its data field "family" or type. This can help separate out a field that has much higher or lower values than other fields in its family. For example, by graphing recovery money on its own axis, fluctuations are easy to see even though values are small relative to other currency data fields.

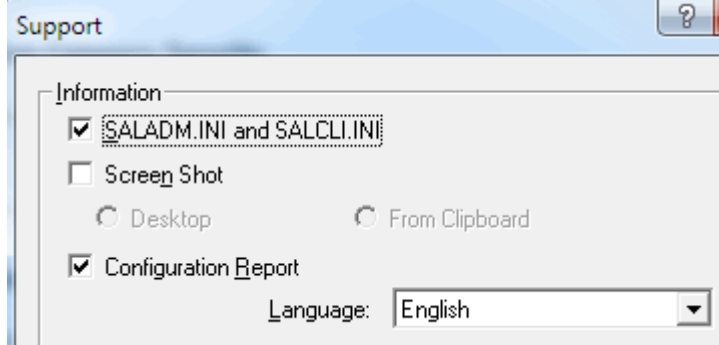


## Enhanced language compatibility

SIM can now show additional areas of the dataset in the appropriate dataset language. As in previous versions, you can select the dataset language in Data Format Preferences. The language selection now controls the following in addition to the key member descriptions and dimension member descriptions. (Only languages that have been set up for the dataset are available.)

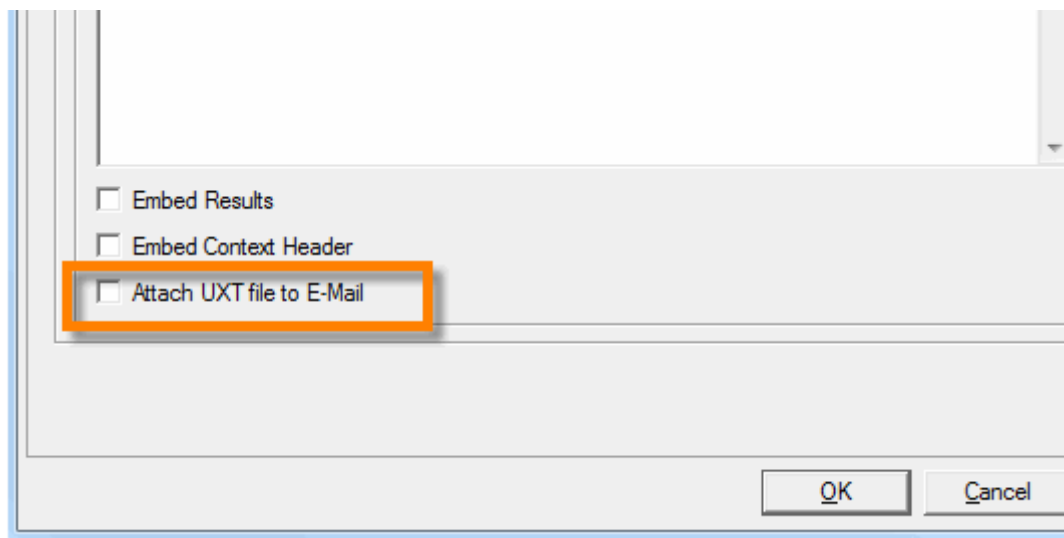
- The labels used for the names of equivalent tables, calendar tables, currency tables, weighted day tables, and business day tables can be language-specific.

- The labels used for the names of period tables as well as the period table qualifiers and individual period descriptions can be language-specific.
- A new option in the Support dialog allows you to select the language to use in the configuration report.



## Macro enhancements

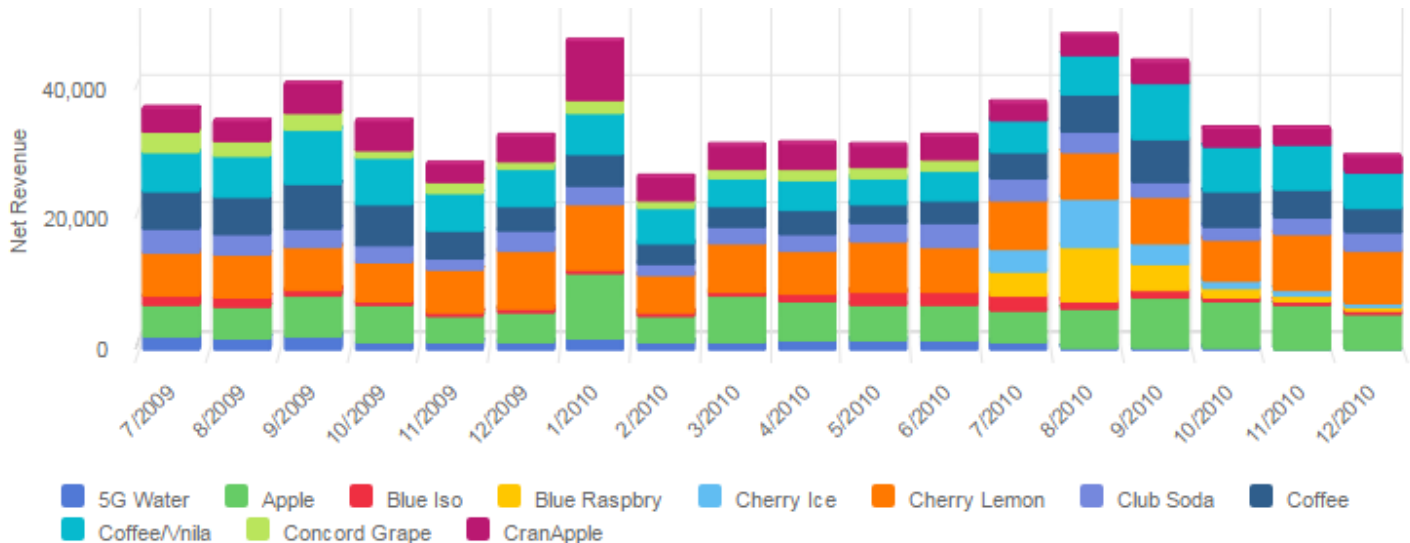
- When emailing results via a macro, you can set the macro up to attach a .UXT file that "bookmarks" the results in addition to attaching or embedding the selected output type.



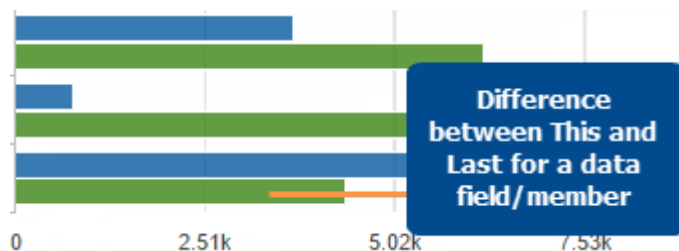
- The process for adding difference/percent change columns to an Exception macro is easier than previous versions. When editing an Exception macro, click the **Analysis Dialog** button to open the Exception Setup dialog. This dialog now has a setup ⚙️ button, which opens a column setup area where you can add difference and percent change or remove columns. You can then save the changes to the macro.

## New graph options

- You can optionally hide the "All Others" category in Share Trend stacked area and stacked bar graphs. Previously, this option was only available in the line and side-by-side graph formats. By hiding the "All Others" category, you can view the performance of less significant members without the "All Others" category monopolizing the graph.



- You can graph the difference between two time periods using a Comparative Dimension Members Actual Value graph. The new "Diff" option is accessed via the tools pop-up menu.

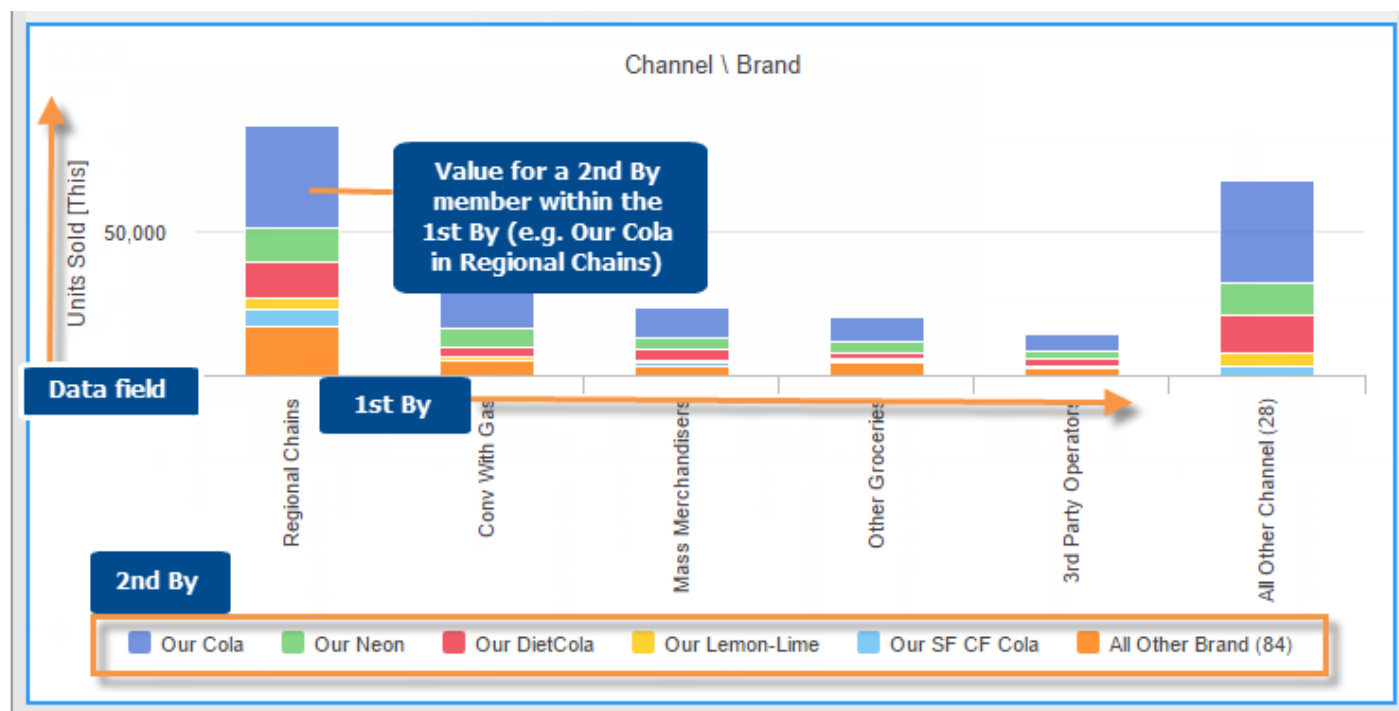


- The "Diff" graph option is also available in Comparative Time Series line and bar/line graphs to show which dates had the most significant changes since the previous time period.



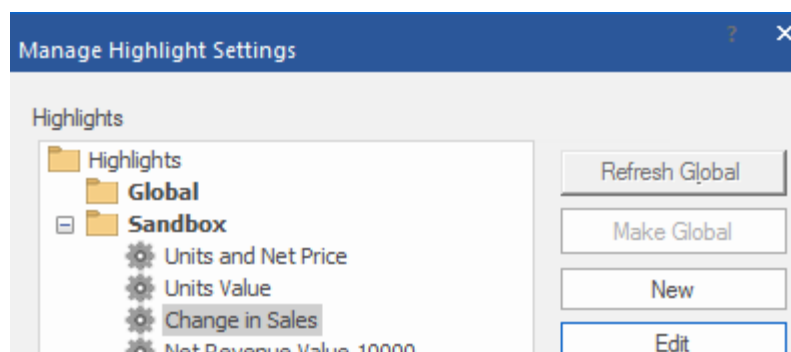
## Crosstab graphs

Some types of crosstab graphs are more logically organized—by the 1st By dimension and then by the 2nd By dimension. For example, the stacked bar graph now shows each 1st By member as a bar, and then breaks down each bar by the 2nd by dimension. This change affects the following types of graphs: side-by-side bar graph, stacked bar graph, and cube graph.



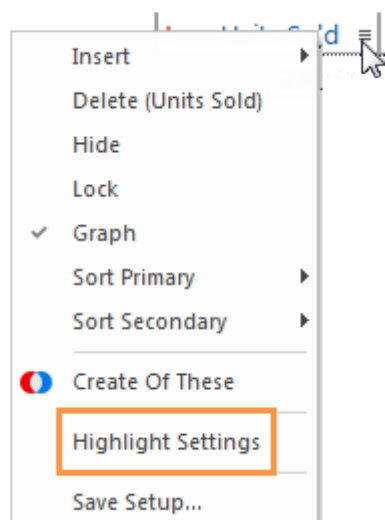
## Highlight settings

- You can now save and reuse multiple sets of highlight settings. For example, you might use a set of highlight settings to spot customers who are up or down in sales volume, and other highlight settings to identify products with unusual values for units and net price.





- Global highlight settings are available to facilitate sharing of commonly-used highlight settings.
- You can easily switch between saved highlight settings using a drop-down menu. A new display preference controls how many items to show in this menu.
- The Manage Highlight Settings dialog lets you create, edit, turn on, import/export highlight settings, and more. You can store highlight settings in folders for easy access.
- Bookmarks and macros store highlight settings.
- You can quickly apply highlighting to any single data field in the current view.



- Darker shading is now available for highlighting. In display preferences, you can choose whether you want to use the darker colors or the original pale highlighting colors.
- New highlighting styles are available. You can highlight the entire cell like in previous versions or display a variety of symbols beside the highlighted values. For example, you can use arrows, circles, triangles, and more.

		Units					Net Revenue					
		This	Last	Diff	% Chg		This	Last	Diff	% Chg		
+	Office-Lasoski	✓ 11,636	8,804	2,832	↑ 32.17		\$111,119	\$74,527	\$36,591	↑ 49.10		
+	da Matta, Cristian	✓ 10,346	9,872	474	— 4.80		\$73,817	\$77,729	(\$3,912)	— -5.03		
+	Fittipaldi, Christia	9,934	6,811	3,123	↑ 45.85		\$72,225	\$55,037	\$17,187	↑ 31.23		
+	Blundell, Mark	9,087	9,842	-755	— -7.67		\$66,382	\$78,324	(\$11,942)	↓ -15.25		
+	Tagliani, Alexander	7,882	9,610	-1,728	↓ -17.98		\$59,585	\$74,636	(\$15,051)	↓ -20.17		
+	Office-Ferkel	7,575	9,627	-2,052	↓ -21.32		\$67,080	\$84,437	(\$17,358)	↓ -20.56		
	Totals	227,265	252,847	-25,582	↓ -10.12		\$1,990,422	\$2,251,558	(\$261,136)	↓ -11.60		

## Output enhancements

- A preference setting lets you optionally add date range details to the headers of exported files and print-outs. The date range details include the complete start and end dates for the date range (or both date ranges in YAG and advanced comparison views).


	A	B	C	D	E	F	G
1	Comp ~ ME 11/2015 vs. YAG						
2	Date Range: 11/1/2015 Sun - 11/30/2015 Mon (1 Month) vs. 11/1/2015 Sat - 11/30/2015 Sun (1 Month)						
3	Total Region: 8						
4	Dataset: BestBottlingCo_RT						
5	User: JCUMMINGS						
6	Created: 12/10/2015 9:40 AM						
7	Cube: Sales						
8	By: Region						
9							
10		Units	Units				
11		This	Last				
12	SouthWest Area	58,964	52,127				
13	SouthEast Area	67,473	55,474				
14	NorthWest Area	53,648	50,034				

- A preference setting lets you optionally add the file creation dates to the headers of exported files.

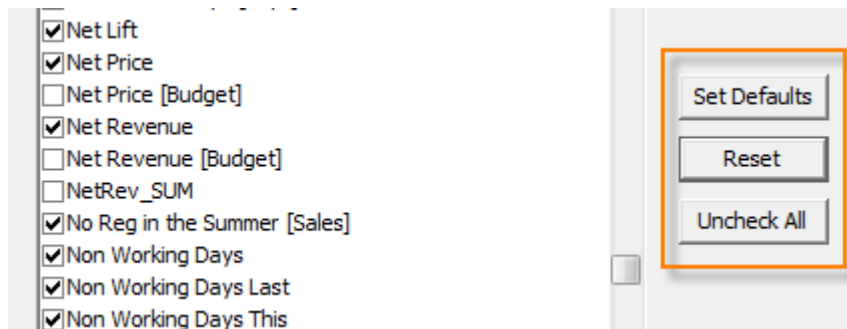
	A	B	C	D	E
1	Comp ~ ME 11/2015 vs. YAG				
2	Date Range: 11/1/2015 Sun - 11/30/2015 Mon (1 Month) vs. 11/1/2015 Sat - 11/30/2015 Sun (1 Month)				
3	Total Region: 8				
4	Dataset: BestBottlingCo_RT				
5	User: JCUMMINGS				
6	Created: 12/10/2015 9:40 AM				
7	Cube: Sales				
8	By: Region				

- The output preferences and the CSV/Excel export preferences available in previous versions are now located in a new "Output" tab in the Preferences dialog.

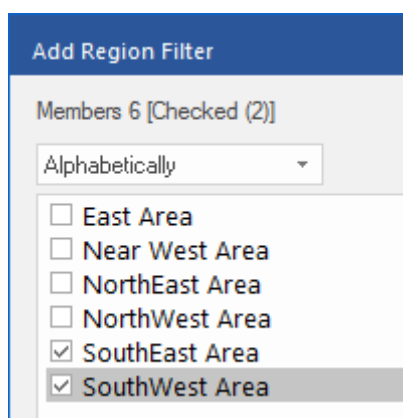
## Ease-of-use and appearance

- You can now turn on a collection by title (i.e., Show by Title) even if the current view is not grouped by the matching dimension. In this case, the view does not list out the selected collection(s) until you group the data by the corresponding dimension.
- SIM automatically saves user data in temporary files and automatically recovers the data from those files if the server connection is lost and the user data location is the server. Previously, in this situation, SIM would prompt you to save the temporary files and then prompt you to recover from these files the next time you logged in. Now, data recovery is automatic in most situations.
- The Exception analysis setup dialog has a new button  that opens a column setup area, where you can add difference and percent change or remove columns.

- New buttons make it easier to modify the "Default" setup, which is the default set of data fields shown when no setup is selected. You can access these options in general preferences.



- You can use any applicable key description or the key code as the unique identifier (i.e., key property) in key lists or key graphs. The selected property appears as the first column in key lists and beside each bar, pie slice, etc., in graphs.
- A new option allows bookmarks, supermarks, storyboards, and macros to reset the focus when they are opened. This option, "Ignore Focus," is especially useful when saving a bookmark, storyboard, etc., that compares members for the "Most Recent" or "Most Recent Complete" time period; otherwise, the view may automatically scroll to the remembered focus rather than showing the beginning of the list. In time-series views or other views that filter out data based on the focus member, this option is cleared by default so that the bookmark, storyboard, etc., retains the filter.
- You can add a filter for any valid dimension without drilling or modifying the drill path. Simply select the dimension and then select one or more members from a dialog. (If you select multiple members, SIM creates a temporary collection.)

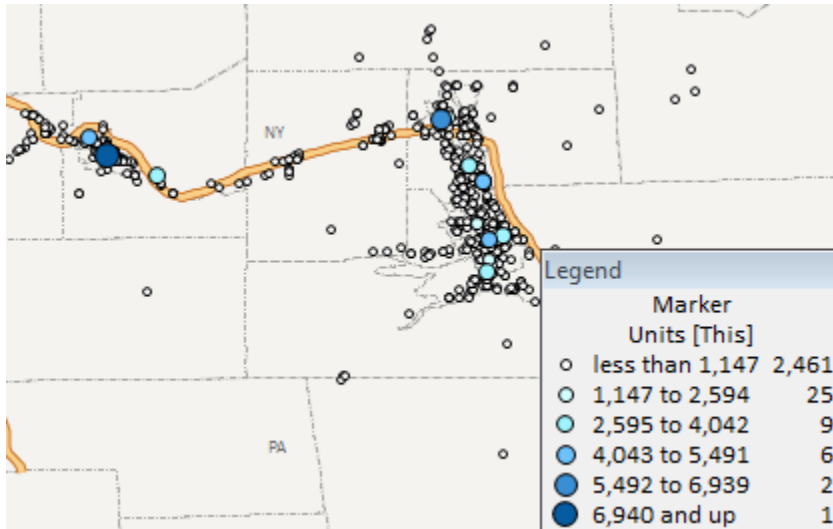


This dialog also allows you to reset the filter to All, which turns off the filter but leaves a filter placeholder to quickly turn the filter back on.

- Logical keys are now located underneath the actual keys in menus rather than at the same level for improved organization of long lists of dimensions. As in previous versions, administrators can create these logical keys to group related attributes such as geographic location (state, county, city, etc.), sales responsibility, and more.

## Geo enhancements

Geo maps now draw points in order from least to greatest values so that the markers shown at the bottom of the legend are on top. This allows you to easily spot outliers in many types of maps. As in previous versions, you can bring any category of points to the foreground by clicking in the legend and selecting from the menu.



## SIM system requirements

SIM now requires a 64-bit operating system. Refer to the "Salient UXT System Administrator's Guide" for more information.

## For more information

To see instructions for using new features, refer to the SIM help or user manual provided with the release. Some features may require additional licensing.