Salient Dashboards

Training Guide

for Power Viewers

Version 8.6

June 13, 2024

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Limited warranty

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Salient Management Company

203 Colonial Drive, Horseheads, NY 14845

(607) 739-4511

support@salient.com

www.salient.com

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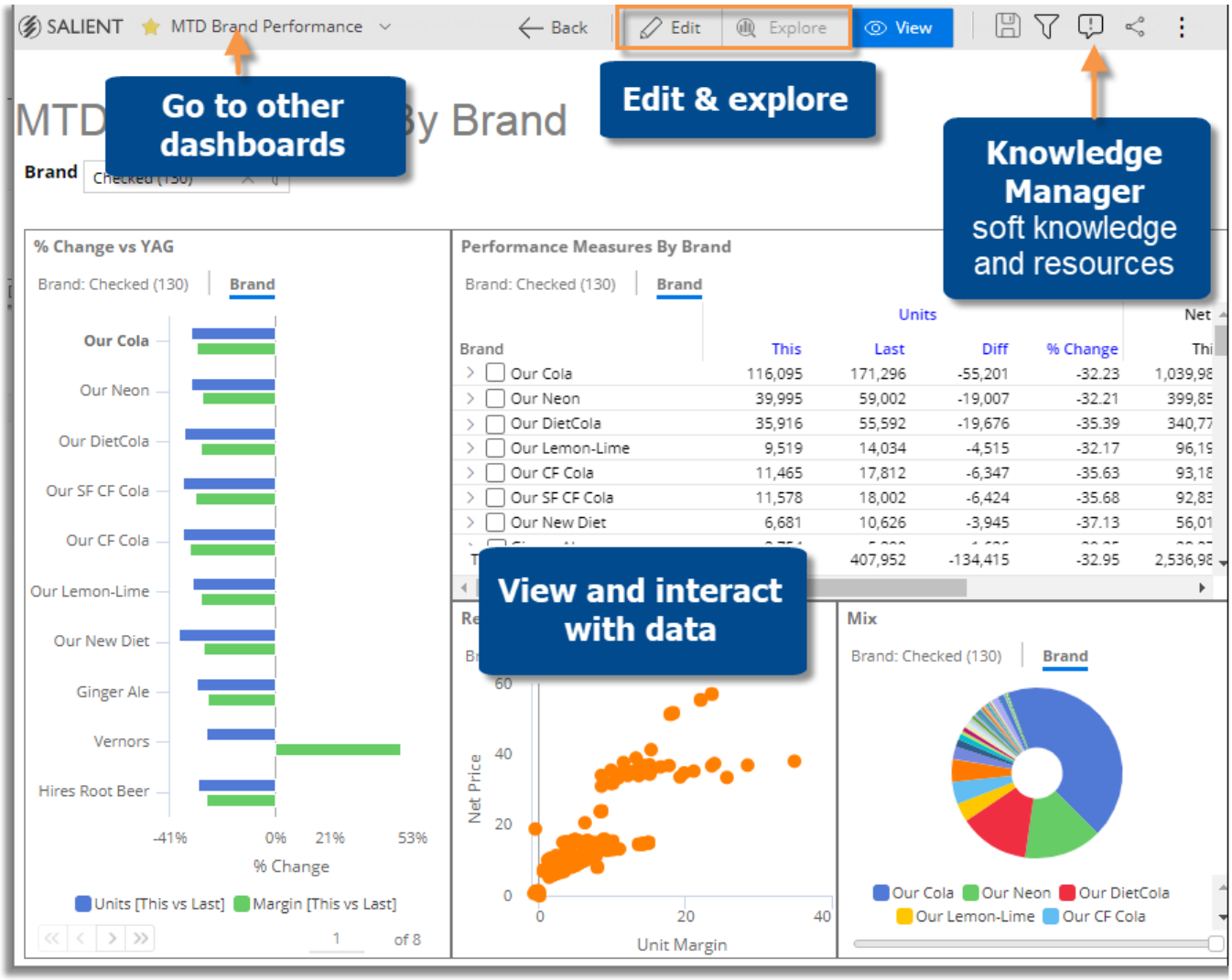
About Salient Dashboards

The Salient Dashboards application enables your team to create and access interactive, consolidated visualizations of decision support intelligence in a browser for consumption from any computer or mobile device.

Like Salient's other applications, dashboards start with UXT® technology, which transforms huge volumes of data into a highly-optimized analytical data mart. Salient Dashboards provides role-based access to dashboard building, viewing, and exploring capabilities. Dashboard Designers can create and publish dashboards in "edit" mode using a variety of widget types (Comparative, Trend, Scattergram, etc.) and options to provide the exact information users need—from an overview of the entire organization down to a single fact. Users can then view and interact (see page 10) with the customized dashboards and, if they wish, go on to perform their own data investigation in "explore" mode (see page 66). Portal dashboards (see page 7) provide easy access to dashboards. In addition, a mobile application is available to provide touch-enabled access on mobile devices.

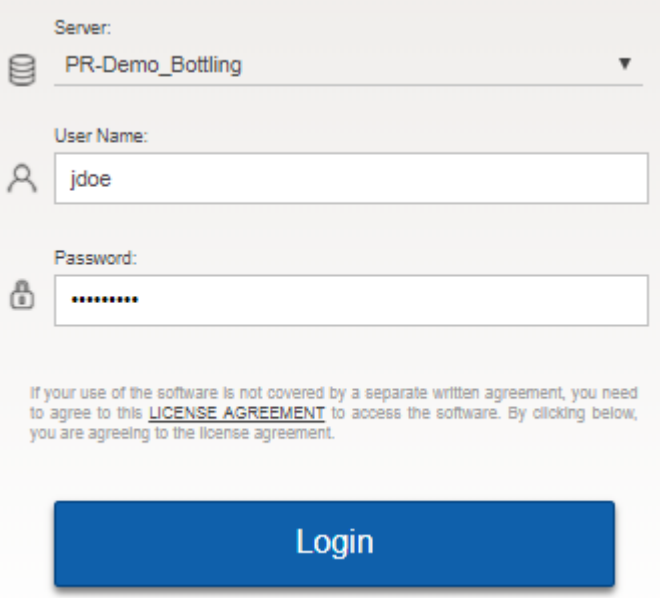


Getting started

Log in

Before you can use Salient Dashboards, you must log into a dataset. Contact your administrator if you don't know your user name and password or the login page URL.

1. In your web browser, go to the address of the Salient Dashboards login page.
2. From the **Server** menu, select a dataset.
3. *For classic login* (i.e., credentials entered directly in Salient Dashboards), enter your user name and password. Then, click **Login**.



External/SSO authentication: Click the **SSO Login** button. If you are not already logged in, the next screen will allow you to enter your user name and password and **Sign in**.

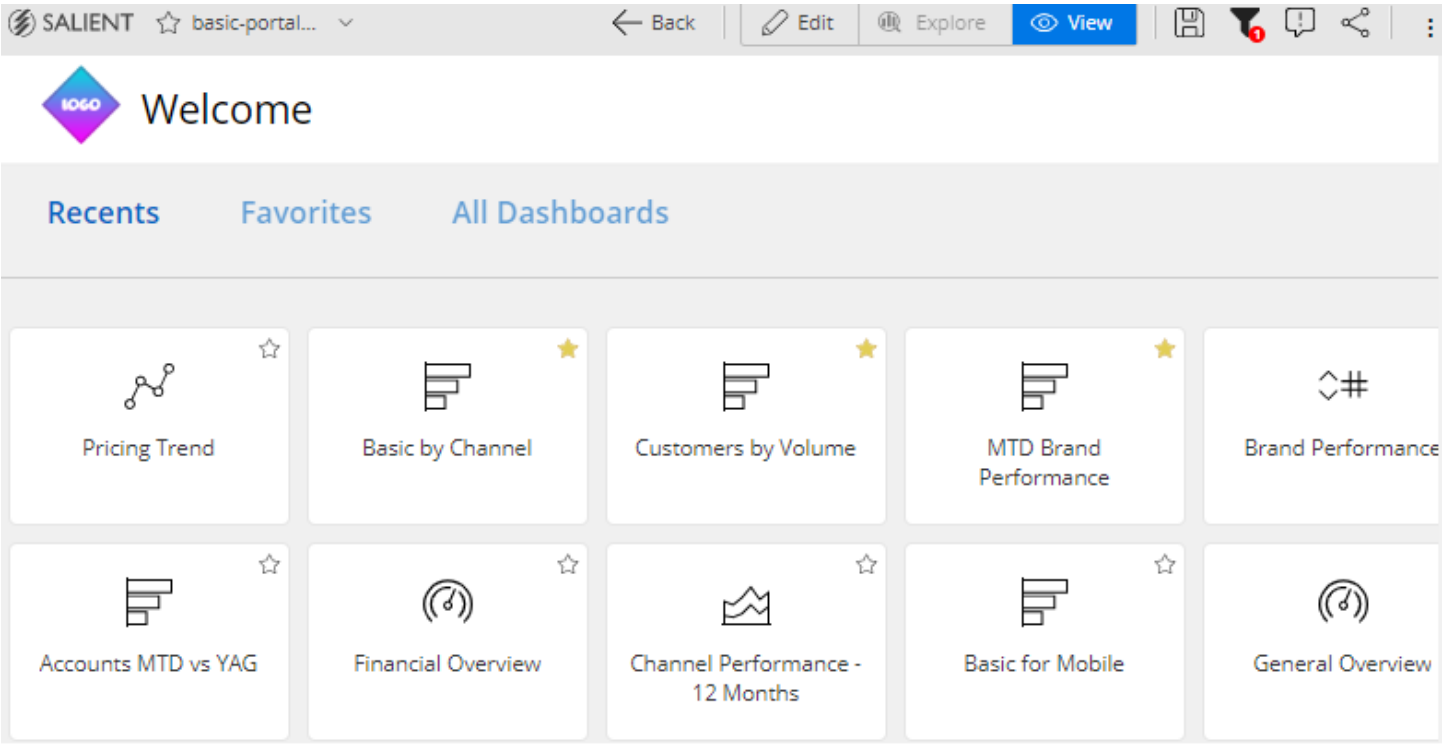
LDAP login (i.e., machine login used for authentication): The user name and password entries may not be needed.

Tips:

- The portal dashboard (see page 7) opens after login unless you have entered a URL for a specific dashboard or changed the home page in user preferences.
- In general, Salient recommends Google Chrome™; however, other browsers are supported.
- A dataset may be configured for a specific language. In this case, the login page will immediately switch to that language after it is selected.
- The first login is typically the slowest due to the downloading and caching of application files.
- Do not attempt to log in to the same dataset more than once at the same time using the same user ID. Multiple logins are not supported.
- You can log out at any time by clicking ⋮ in the upper-right corner of the dashboard screen and selecting **Logout**.

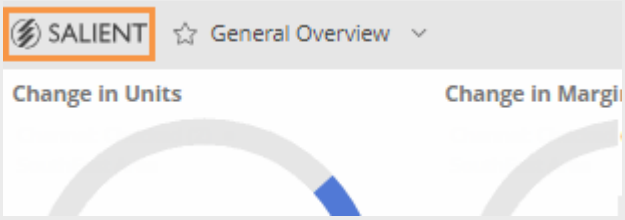
Portal dashboard

After initial login, you will typically see a portal dashboard that provides fast and easy access to dashboards. Salient Dashboards come with a default portal dashboard, which your organization can customize. A portal dashboard has buttons or links to open dashboards. The links may be organized into tabs (e.g., recent, favorite, all, etc.).



Tips:

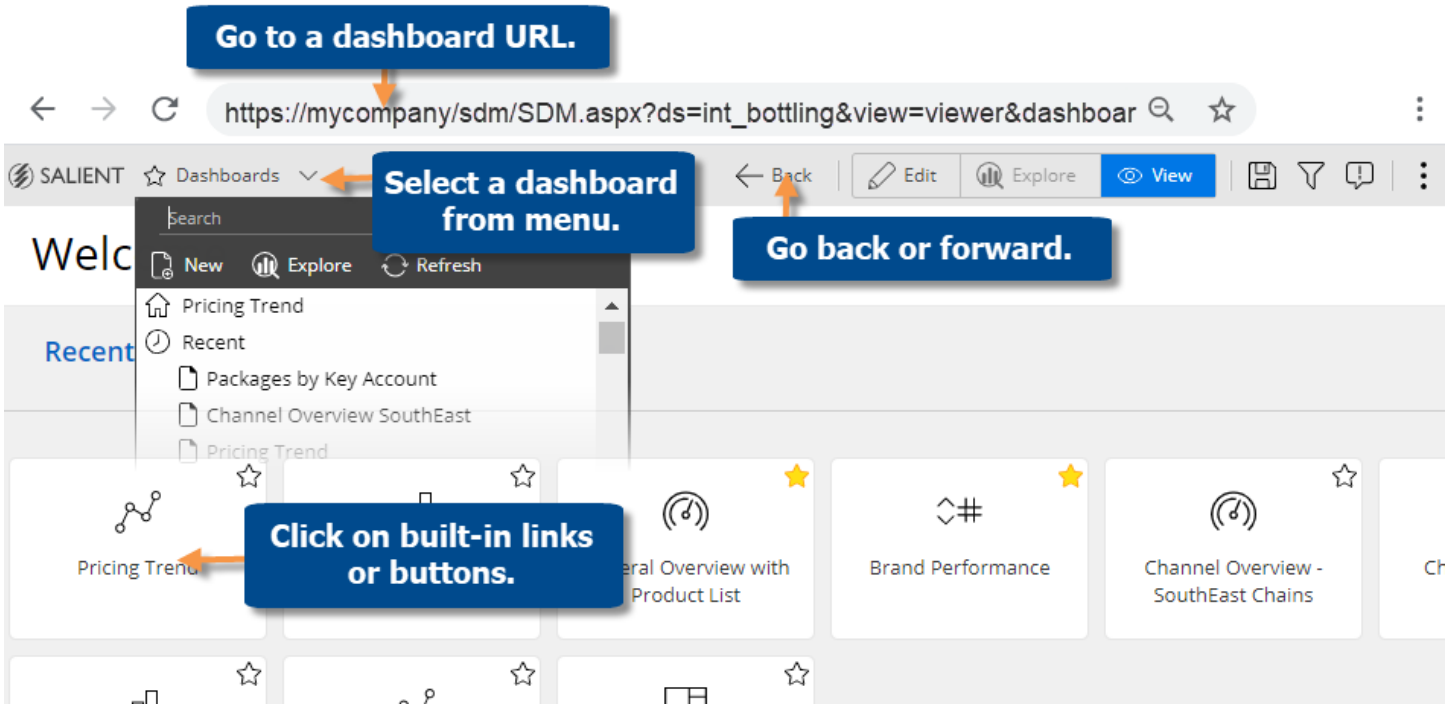
You can go to the portal from any dashboard by clicking **Salient** in the upper-left corner.



User account settings control which dashboards are available.

How to open a dashboard

Use any of the following methods to open a dashboard.



URL

Go directly to a specific dashboard by entering its URL in your browser or clicking on a link (e.g., in an email) This may be the dashboard's permanent URL or a temporary URL created by sharing a dashboard (see page 84).

Built-in links

Click on buttons, links, icons, etc., in the portal or other dashboards.

Dashboards menu

Open the dashboards menu at the top of the screen *(keyboard shortcut: o)*; then, click on a dashboard name.

Back & forward buttons

Go back and forward to dashboards you visited within a Salient Dashboards session. Click the browser's back and forward buttons or use the back button in the dashboard toolbar. Note that the history is cleared when you go to another page.

On a mobile device:

Access dashboards through the Salient mobile app for optimal viewing, or user a browser if you prefer. Going to a dashboard URL will prompt you to choose one of these methods. (To reset your preferred method, clear browser cookies.)

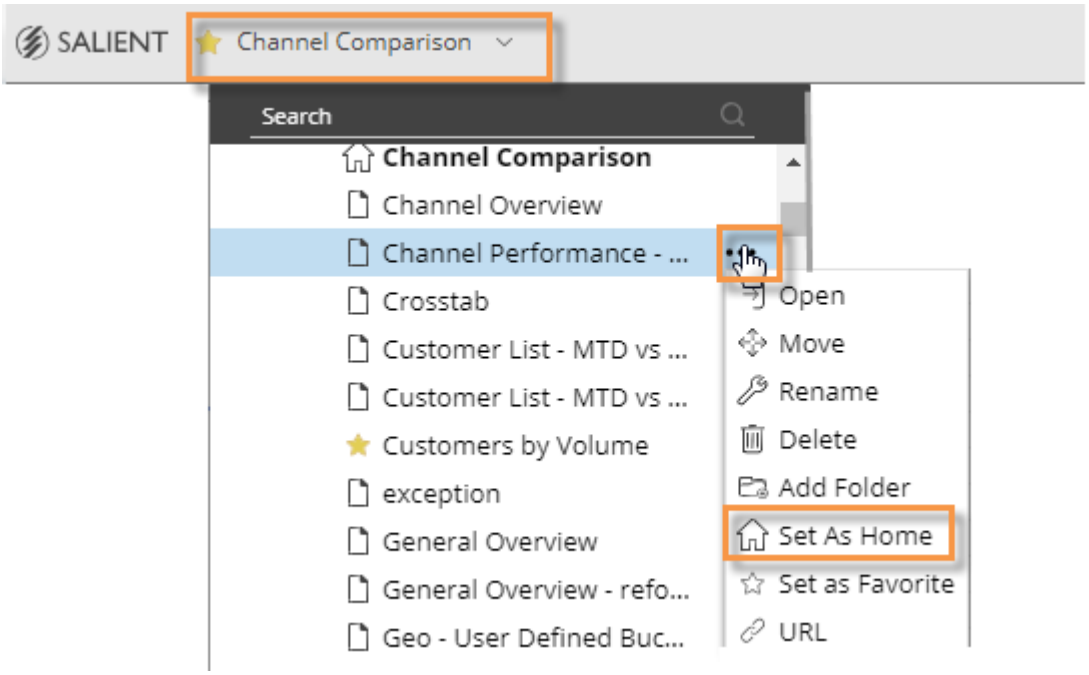
Additional installation and setup are required for the mobile app.

Select the home dashboard

You can select a home dashboard to make it easy to access. The home dashboard will appear at the top of the dashboards menu. In addition, you can change user preferences to go straight to the home dashboard upon login.

To select the home dashboard

1. Click the drop-down at the top of the screen to open the dashboards menu.
2. Locate the dashboard and place the mouse over it.
3. Click the ... button that appears.
4. In the pop-up menu, select Set as Home.
5. If prompted, click **Yes** to confirm the change.

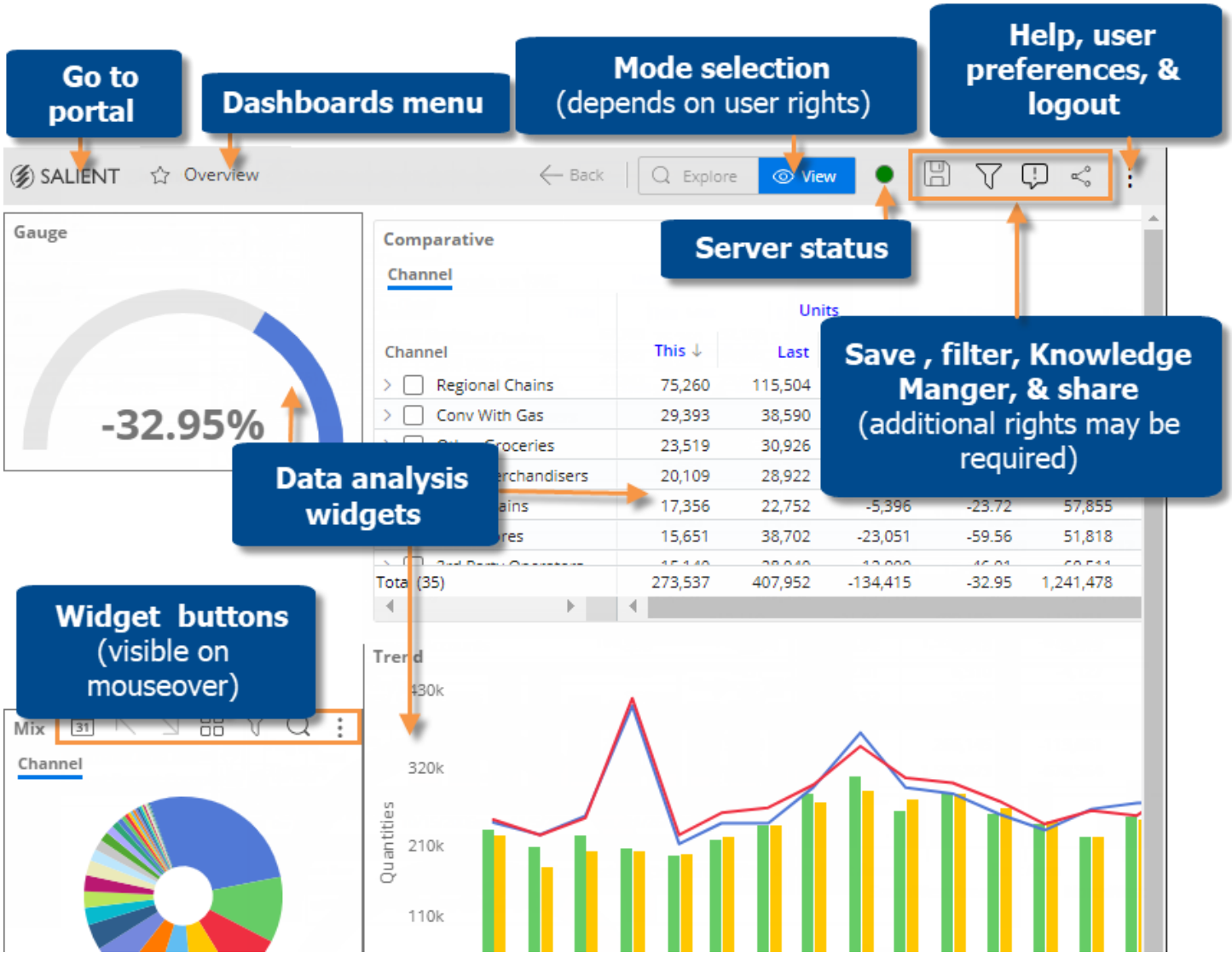


Tip: You can also make a dashboard the home dashboard when you save it.

The Salient Dashboards screen

View mode

Opening a dashboard typically takes you to view mode, where you can interact with the data and navigate to other dashboards. Depending on your user rights, you may be able to further investigate any widget in explore mode (see page 66) or go to edit mode, which provides dashboard design and editing capabilities.

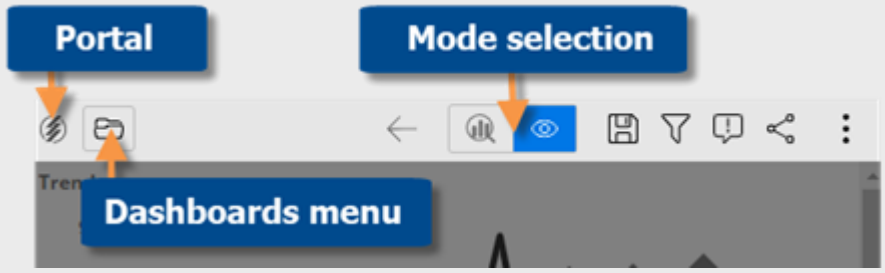


Tips:

The server status icon appears for a short time after opening a dashboard or when the server status changes (= active server; = suspended server). You can mouseover either of these icons to see when the last data update occurred.

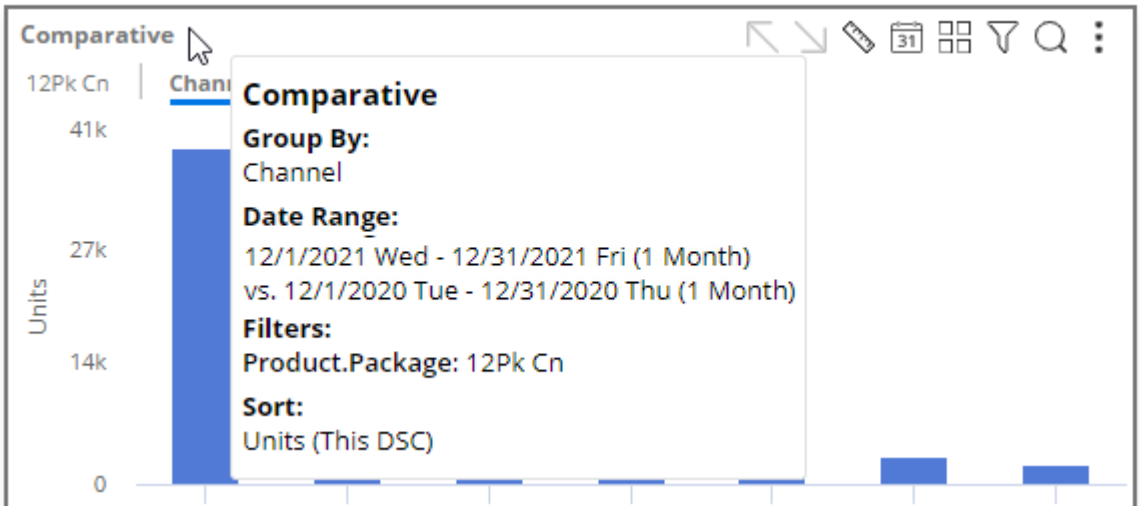
Tips:

In a narrow window, the top toolbar is condensed, but the same functions are available:

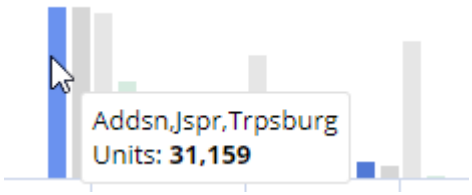


Dashboard tooltips

It is important to understand what data you are looking at in each widget. For example, you should know if you are viewing data for a particular package, region, etc. You can view a summary of this information by placing your cursor over the widget title bar. The tooltip shows the By, date range, sort, filters, and more.

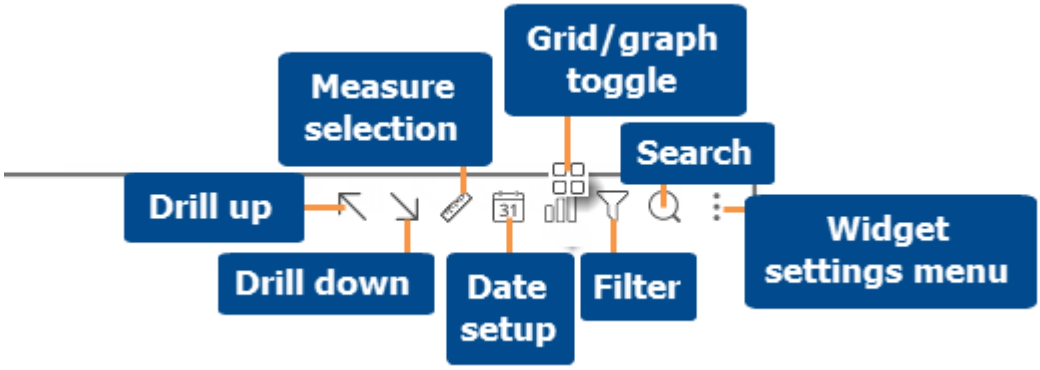


You can also view information about specific items within a widget by placing your cursor over the item. (Some mobile devices may not support mouse-over tooltips.)



Widget buttons

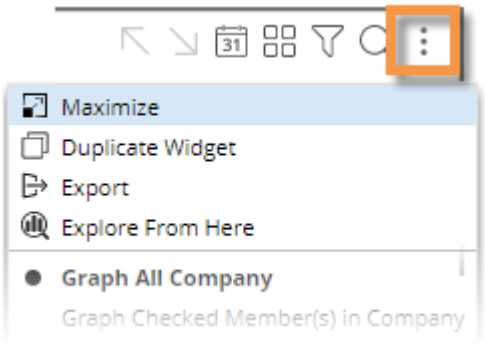
The widget toolbar buttons in the widget's upper-right corner (on mouseover) let you change and interact with the widget.



- Date setup, measure selection, grid/graph toggle, and filters may be disabled for view mode.
- Drill down is only enabled if the widget has multiple "Group Bys" and you have selected or checked at least one member.
- Drill up is only enabled if the widget has at least one downlevel filter.

Widget menu

You can click ⋮ in the upper-right corner of a widget (visible on mouseover) to open a menu. The available options depend on your rights, dashboards mode, and the widget type. For example:



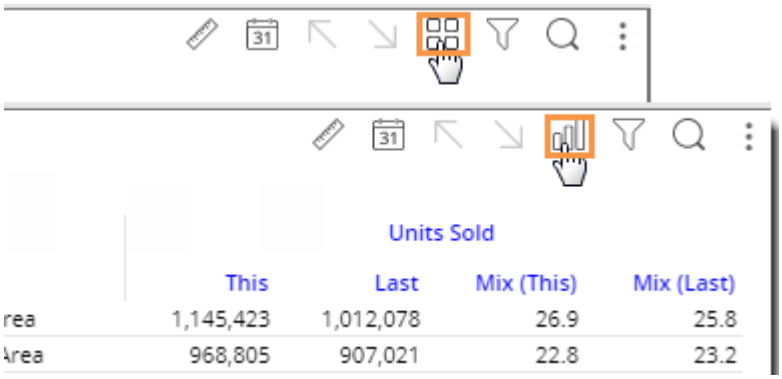
- Maximize - Enlarges the widget to the maximum extent of the dashboard.
- Restore Down - Returns a maximized widget to its original size.
- Duplicate Widget (see page 71) (not available in view mode) - Create a widget exactly like the original. In explore mode, the widget will be expanded in a new tab.
- Export (see page 84) data to UXT, Excel, or CSV (if enabled)
- Explore From Here - Expand the widget in explore mode (see page 66), which maximizes the widget and provides capabilities for data analysis and investigation (e.g. change analysis type).
- Notify - Create rules for sending data-based notifications (additional rights required).
- Graph options - Graph all, graph checked, percent change, actual value, etc. (affects graphs only)
- This and Last, This Only, Last Only (affects graphs only)
- Axis Management (for Trend, Comparative, and Multi Comparative graphs)
- Doughnut, Funnel, Pie, Stacked Area, Line, Vertical, Horizontal, etc. (i.e., graph type)
- ✕ - Close Widget (not available in view mode)

Switch between grid and graph

Most data analysis widgets are available in grid and graph formats.

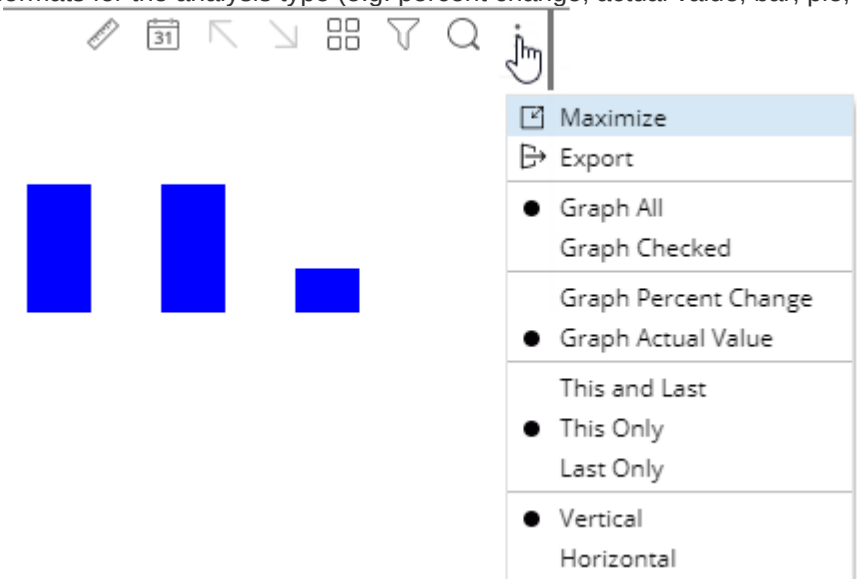
To toggle between a grid and a graph

On the title bar of the widget, click (visible on mouseover) to change from grid to graph or to change from graph to grid of numbers. (This button may be deactivated.)



To select a graph format

For graphs, click in the upper-right corner of the widget (visible on mouseover) to select from available graph formats for the analysis type (e.g. percent change, actual value, bar, pie, etc.).



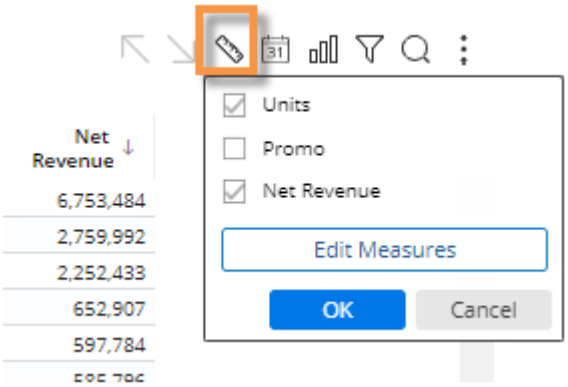
Tip: If the widget uses custom programming (i.e., custom view), the graph/grid button is not available.

Select measures

You can select measures using the measure selection tool in any mode of Salient Dashboards. (This tool may be turned off.)

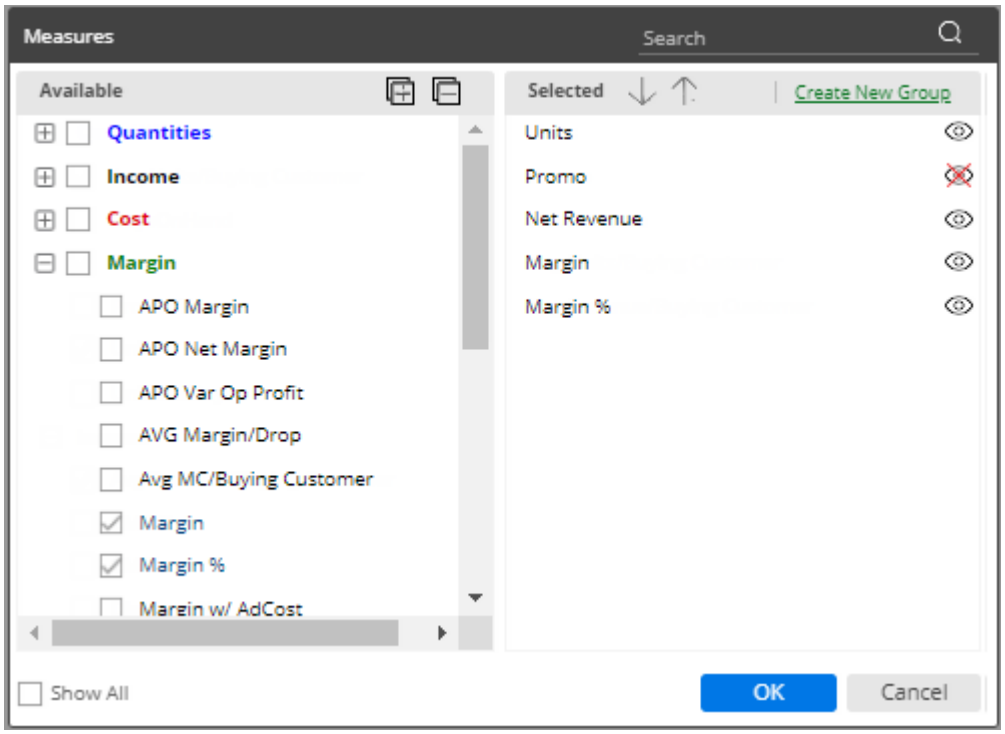
To select measures

1. On the widget toolbar, click the button (visible on mouseover). If the widget only has one measure, this will take you directly to the Measures window (Step 3).
2. In the pop-up menu, check the boxes of the measures to show and clear the boxes of the measures to hide; then, click OK. This menu lists the measures that have been added to the widget. If you don't see the desired measure(s), click on **Edit Measures** and continue to Step 3.



Note: The ability to edit measures in view mode may be restricted by dashboard or user account settings.

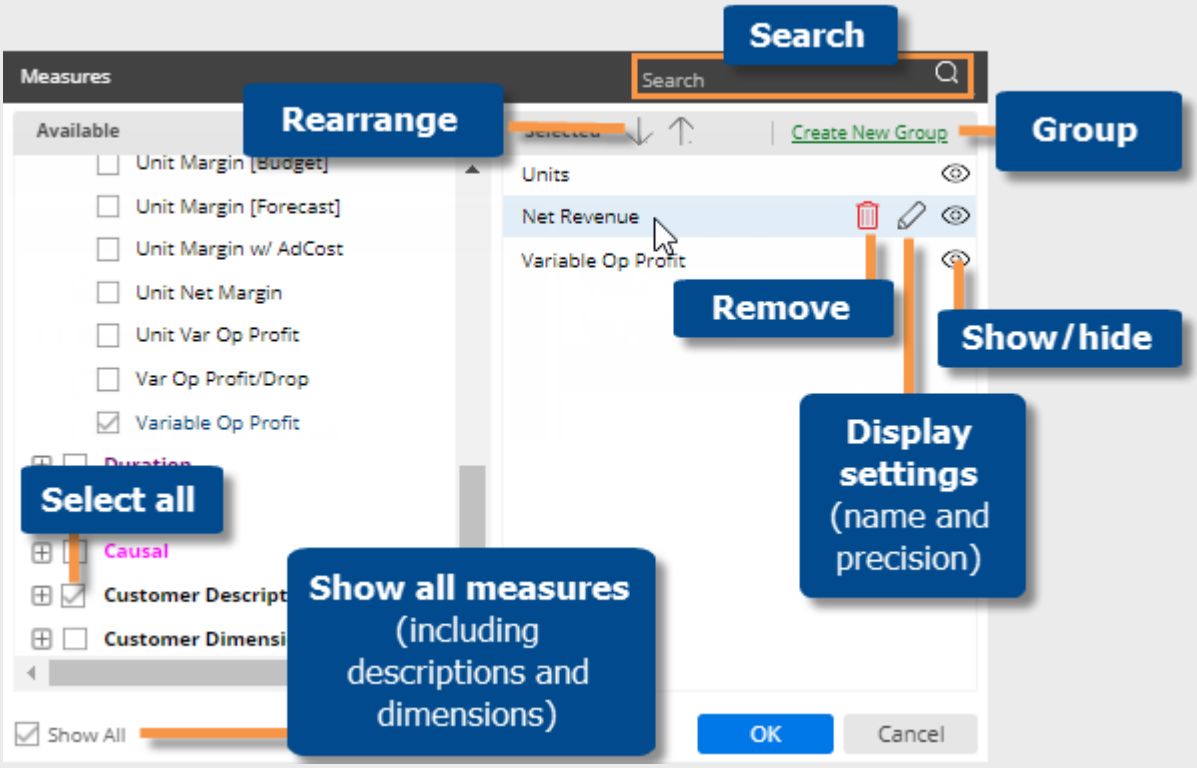
3. *To edit measures:* Expand a data category in the left (Available) pane. Then, check the box(es) of the measure(s), or drag a measure to the right (Selected) pane. Click OK when you are finished editing measures.



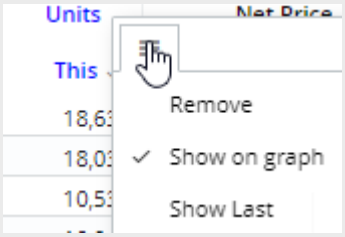
Tips:

In the Measures area:

- The tools in the right pane allow you to search for a measure, remove a measure, rearrange measures, change measure display settings, create measure groups, and show/hide measures.
- By default, the available measures depend on the context (data cube, By, etc.). You can check the **Show All** box at the bottom of the dialog to see all measures regardless of the context.
- The **Show All** box also makes key descriptions (e.g., name, address, UPC, etc.) and dimensions available (requires that the key list is selected as a Group By).



To hide or show a subcolumn (e.g., This or Last), click the menu icon ≡ in its heading and select **Remove** or **Show**.



If barcode rendering is set up, you can click on a UPC heading and select **Show Barcode**. You can then click on a UPC to see a scannable barcode.

Tips:

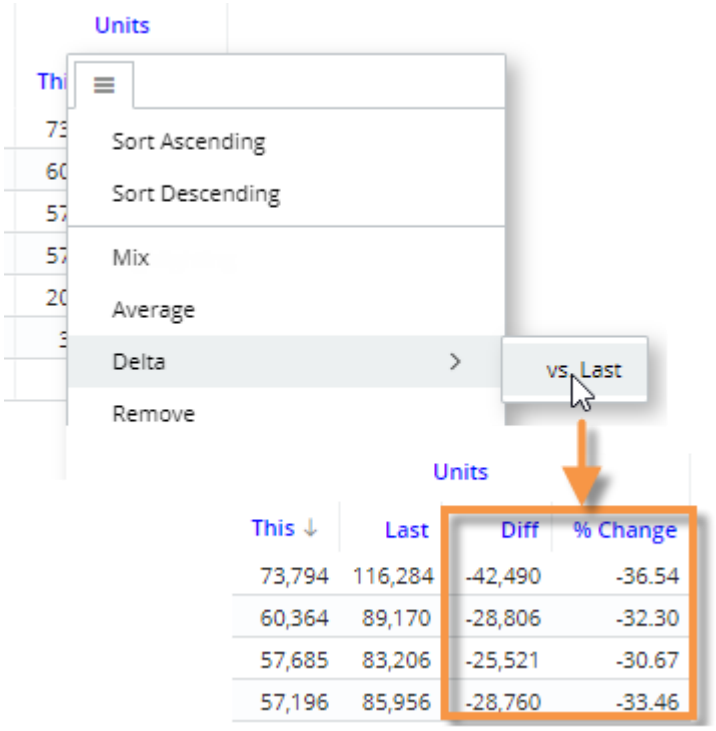
In an Exception widget, the measure selection tool lets you show or hide individual exception columns (Passed, Passed %, etc.). The Measures window (i.e., Edit Measures) controls the measures that will be shown in exception lists.

Insert difference and percent change

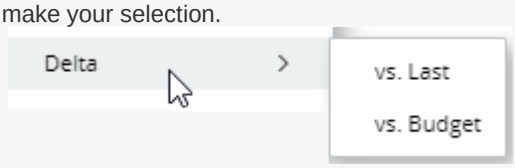
In grids that compare two date ranges, you can insert the difference and percent change (i.e., variance).

To insert difference and percent change

1. Switch to the grid (see page 13) if you haven't already.
2. To add standard variance calculations (This-Last), place your cursor over the column containing the newer values (i.e., This), and click the menu icon ≡. From the pop-up menu, select Delta, vs. Last. This type of variance calculates the change from the earlier date range to the newer date range; values will be positive if values increased over time.



Tip: To add the difference/percent change between any other values (e.g. This vs. budget), place your cursor over the first subheading in the formula, click the drop-down arrow, and then make your selection.

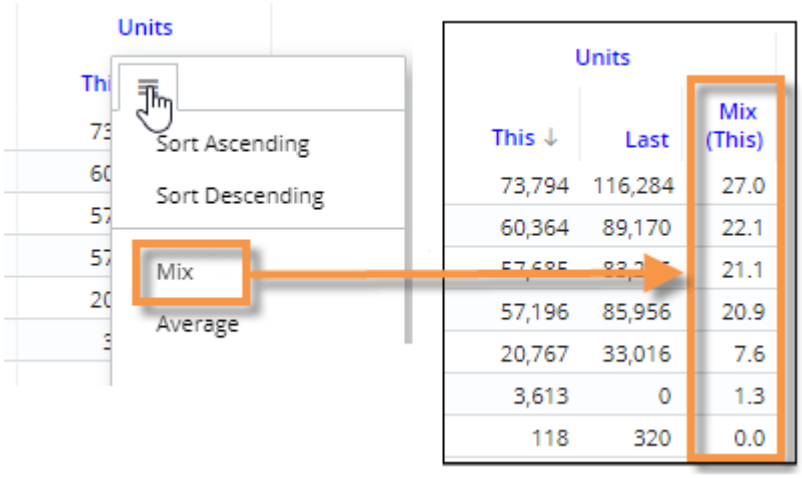


Insert mix

In grids that compare members, you can insert the percent of the total (mix) contributed by each member. In a Trend or Comparative Time Series widget, this adds the percent of the total for each unit of time. You cannot add mix for fields calculated with multiplication or division (such as per unit fields).

To insert mix

1. Switch to the grid (see page 13) if you haven't already.
2. Place your cursor on the column for which you want to add mix values.
3. Click the menu icon ≡.
4. On the pop-up menu, select Mix.



Tip: Additional options are available in Crosstab grids.

- Column (Mix - C) - percent of the total of all columns within the given row.
- Row (Mix - R) - percent of the total of all rows within the given column.
- Total (Mix - T) - percent of the total of all rows and columns.

For example, the following shows Mix for Mocha Coffee in the SouthEast region:

	Mocha Coffee Units				Total 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		100.0	41.2	651	100.0

Mix - C = 185 (Mocha Coffee in SouthEast)/459 (All brands in SouthEast) x 100% = 40.3%

Mix - R = 185 (Mocha Coffee in SouthEast)/268 (Mocha Coffee in all regions) x 100% = 69.0%

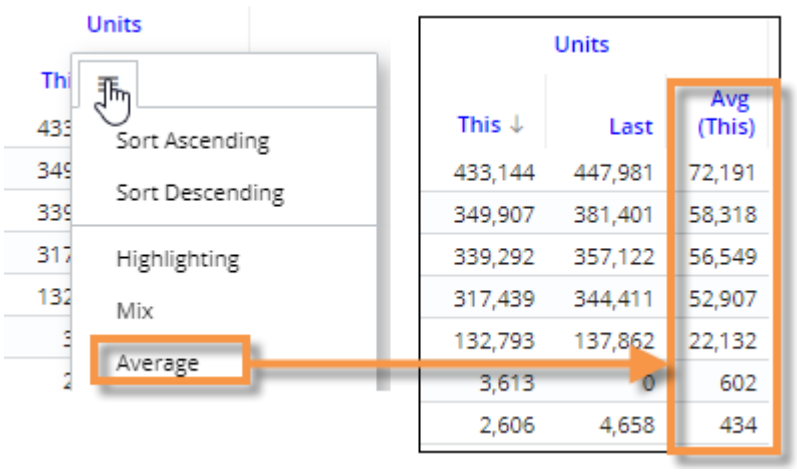
Mix - T = 185 (Mocha Coffee in SouthEast)/651 (total for all brands in all regions) x 100% = 28.4%

Insert average

In comparative grids, you can insert a column that shows the average per day, week, month, or period in the date range. For example, if the view totals data for past 6 months, the average column would show the average value per month.

To insert average

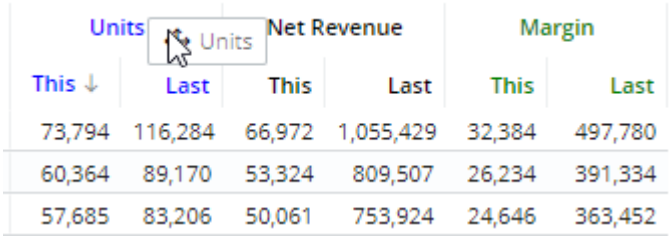
1. Switch to the grid (see page 13) if you haven't already. For the average column to be meaningful, the widget should show at least two units of time (days, weeks, months, etc.)
2. To add the average for This date range, place your cursor over This column; to add the average for Last date range, place your cursor over Last column.
3. Click the menu icon ≡ and then, from the pop-up menu, select **Average**.



Move and resize columns

To move columns

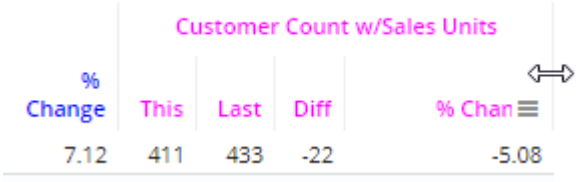
1. In a grid, click the heading of the column you want to move.
2. Press the left mouse button, drag the cursor to the new location, and release the mouse button.



To resize a column

Click and drag the right side of the column to the desired width.

Tip: To go back to the default width (i.e., autosize), click the menu icon at the top of the column and select **Reset to Auto Width**.



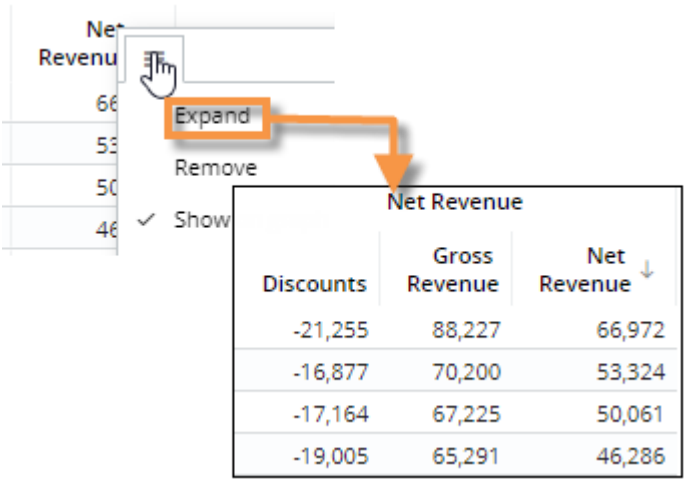
Expand a calculated measure

Many data values are calculated within the UXT system using other measures. To see the formula for a measure, place your cursor over its heading. If you have the necessary rights, you can expand a measure to see all measures used in its formula.

To expand a calculated measure

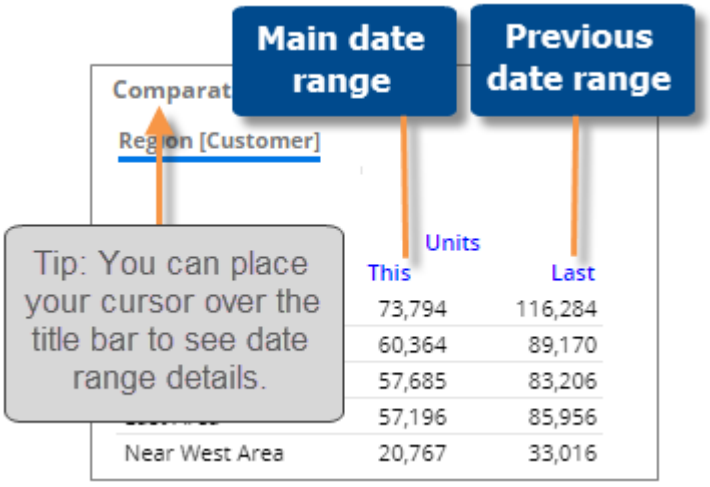
1. In a grid, place your cursor over the heading of the measure you want to expand and then click the drop-down arrow.
2. On the pop-up menu, select **Expand**.

Tip: To remove the measures, access the pop-up menu and select the collapse option.



Select the dates

Each widget shows data for a range of dates (days, weeks, months, etc.). The date range can update automatically over time as new data becomes available. The main date range is referred to as "This" date range. Some widget types allow comparison with a previous date range (i.e., "Last").



Most widget types aggregate data over all dates in a date range (e.g., total of last six months). However, time-series analysis shows each date (e.g., each month) individually.

Salient Dashboards provide several ways to select the date ranges, including:

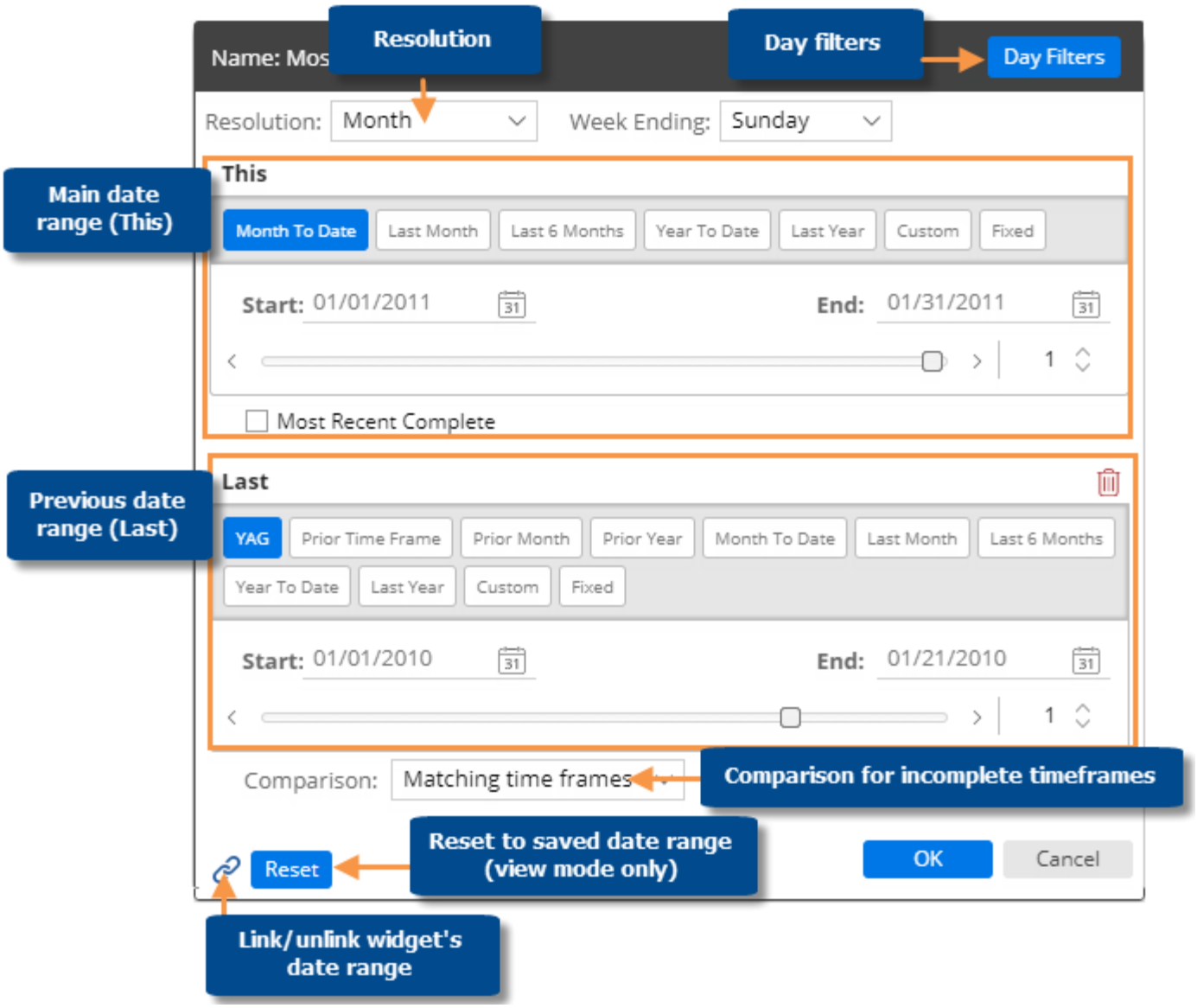
- Comprehensive date setup options, including resolution, number of dates, and advanced options, are available in the date setup area (see page 20). Date settings can be applied per widget and/or linked across multiple widgets.
- A date selector (see page 23) allows users to shift the end date.
- A dashboard may include buttons to quickly change the date.

Date setup

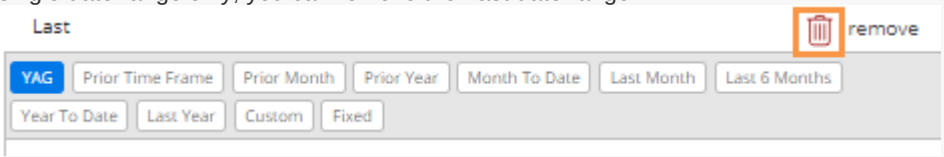
If the widget has a date setup icon in its title bar, you can change its date range, including the resolution, number of dates, comparison date range, etc.

To select the date setup

1. Click the date setup icon in the title bar of the widget.
2. In the dialog, choose from the following date settings. The available options depend on the dataset and may be pre-configured by your administrator.



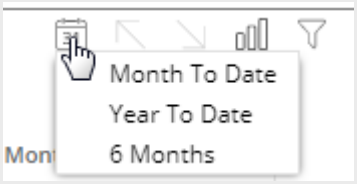
Option	Explanation
Resolution (i.e. days, weeks, months, or customized periods, etc.)	Choose the units of time from the menu at the top of the dialog. This selection controls which date presets will be available.
Main date range (This)	Under **This**, click the button of the date range to view (e.g. Month To Date). The available date presets depend on the resolution selected above and the dataset configuration. If you wish, you can customize the date range further after making your selection.
Day filters (optional)	Optionally, click the **Day Filters** button at the top of the dialog to choose specific days of the week or business days within the date range to analyze. Data for all other dates will be filtered out.

Option	Explanation
Comparison date range (Last) - optional	Under **Last**, click the button of the previous date range (e.g., YAG). The available options depend on the resolution selected above. If the dialog does not include a Last section, click Add Date Range at the bottom of the dialog to include a previous date range if desired. **Tip:** A comparison date range is optional in many widget types. If you want to look at a single date range only, you can remove the Last date range. 
Comparison for incomplete timeframes	A **Comparison** option at the bottom of the dialog controls the selection of the previous (Last) date range when This date range is incomplete. • **Matching time frames** - Adjust the number of days in Last date range to match the number of days in This date range for a precise view of gain/loss (i.e. how much better/worse are we doing). For example, compare March 1 through 15 of this year with March 1 through 15 last year. • **Complete last period** - Do not adjust the number of days in Last date range; instead show the complete last month or period for a gap or goal perspective (i.e. how much more to go). For example, compare March through 15 of this year with the full month of March last year.
Linked dates (i.e., use dashboard date)	Toggle the link icon at the bottom of the dialog to link or unlink the widget's date range, depending on whether you want the date range to update with the dashboard date. - indicates that the widget's date will update when the dashboard date changes. In view mode, the date ranges of all linked widgets update simultaneously when one of them is changed. - indicates that the widget's date range is unlinked and, therefore, has its own stand-alone date range.

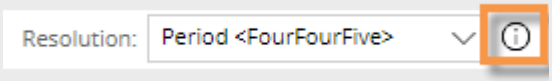
Tips:

In view mode, you can click the Reset button to revert the date range back to the last saved settings.

Multi Comparative widgets can show additional date ranges besides the standard This and Last ranges. To edit a date range, click in the widget's toolbar and then select the name of the date range. Multi Comparative date ranges cannot be linked to other widgets.



When custom fiscal periods are selected, you can click the **i** icon to view the start date and end dates of each period.



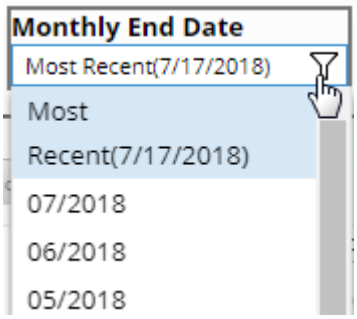
End date selection

A date selector allows users to choose the dashboard end date to shift the date ranges of multiple widgets across the dashboard at once. This type of date selection does not change the resolution (days, weeks, months, etc.) or number of dates in the date ranges.

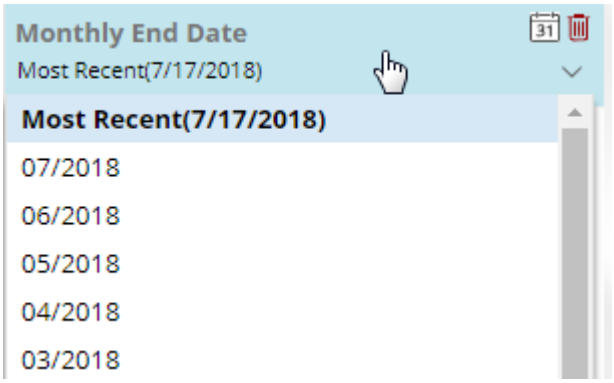
To select the dashboard end date

1. Click a date selector to open it. A date selector may be in the filters panel or within the dashboard as a separate widget, depending on the dashboard's setup. If the dashboard doesn't include a date selector in either of these areas, you can add one (see page 24).
2. Select a dashboard end date from the menu. This controls what is considered the current date or "today" and will, therefore, adjust dynamic date ranges relative to this date. Fixed date ranges and date ranges that are unlinked (i.e., do not use the dashboard date) are not affected by end date selection.

As a separate widget in the dashboard:



In filter panel:

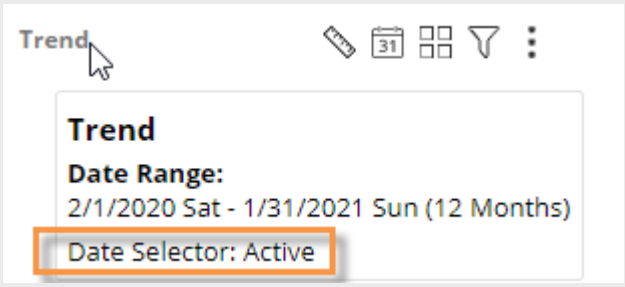


Tips:

If the resolution of an end date selector is different than a widget's date range, then Salient Dashboards will use an appropriate end date based on the selection. For example, if the date selector is monthly and a widget's date range is last week, the resulting date range is the last full week in the selected month.

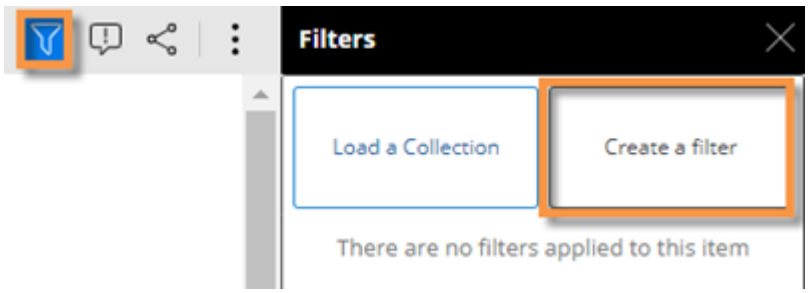
Depending on how it has been set up, the date selector may include a Most Recent or Most Recent Complete option.

A date selector can be selectively turned off for a widget in edit mode, so that it does not affect the widget's date range. You can see whether a date selector is active or inactive for a given widget by placing your cursor over the widget's title to see the tooltip.



To add a date selector to the filters panel

1. Click the filter icon at the top of the dashboard screen to open the filter panel.
2. Click **Create a filter**.
3. Click **Date**.



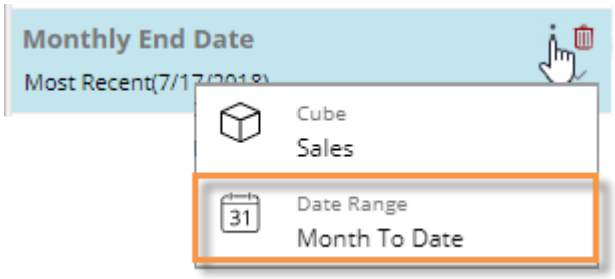
4. Set the dates that will appear as choices in the menu.

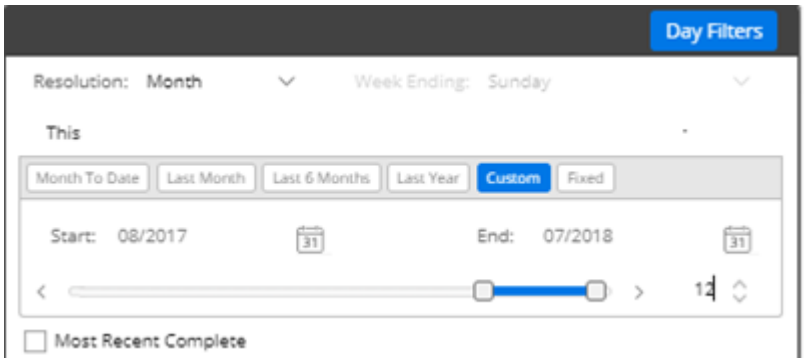
   i. Mouseover the date selector in the filters panel, and then click the ⋮ icon.

   ii. Click on Date Range.

   iii. Select the resolution of the dates to appear in the menu (e.g., months).

   iv. Configure the date range so that it includes all of dates that should appear as choices in the menu. The dates can be fixed or move automatically based on available data. For example, you might want to allow users to select from the last twelve months.

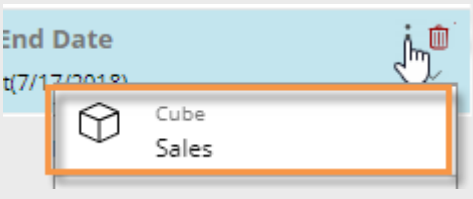




Tips:

The selected date cube controls the available dates. You may need to change the data cube associated with the date selector to make the desired dates available.

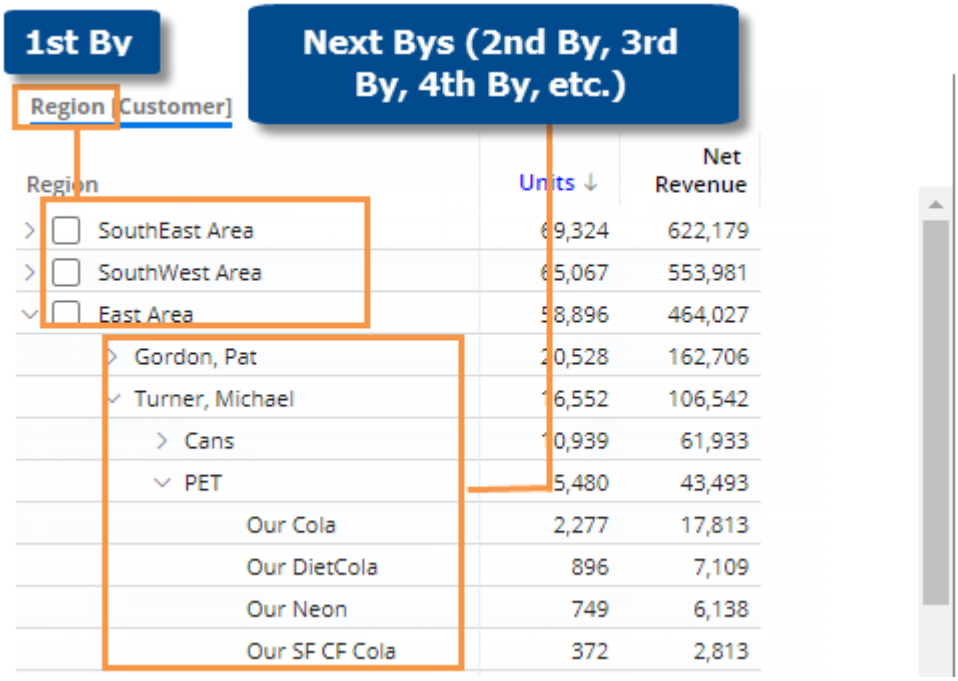
In the Filter panel, this can be done by clicking the ⋮ icon and selecting **Cube**.



The date selector will affect all widgets that use the dashboard date (i.e., linked dates).

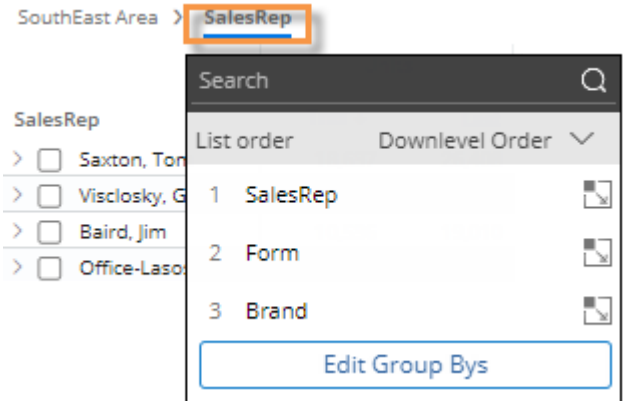
Group By attributes

You can select how data is grouped (i.e. Group By) in widgets that compare members. The 1st By is the attribute used to group data at the highest level. Additional levels of attributes (2nd By, 3rd By, etc.) become visible as you expand members or drill down. (Group By selection may be turned off.)



To select the 1st By

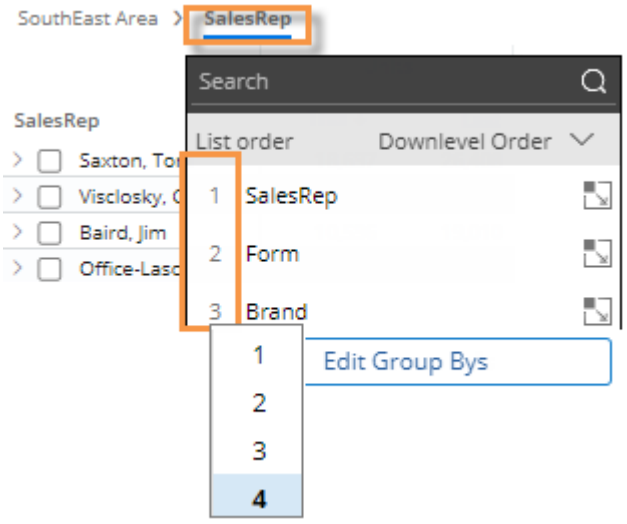
1. Click the By in the breadcrumb path (underlined). If the widget only has one Group By dimension, this will take you directly to the Group By window, where you can edit dimensions (see page 26).
2. In the pop-up menu, click the name of the dimension to use for grouping the data at the highest level. To search for a dimension, enter the first few characters at the top of the menu. This menu includes dimensions that were built into the widget during dashboard creation. If you do not see the dimension in the list, click on **Edit Group Bys** to access more dimensions (see page 26).



Tip: You can click to turn on auto-expand for a dimension. This will expand all members to the next By. The results will be different depending on the type of view: standard grid (i.e., tree) (see page 28); flat view grid (see page 30); or expanded graph formats (see page 31).

To select the 2nd By, 3rd By, etc. (i.e. downlevel order)

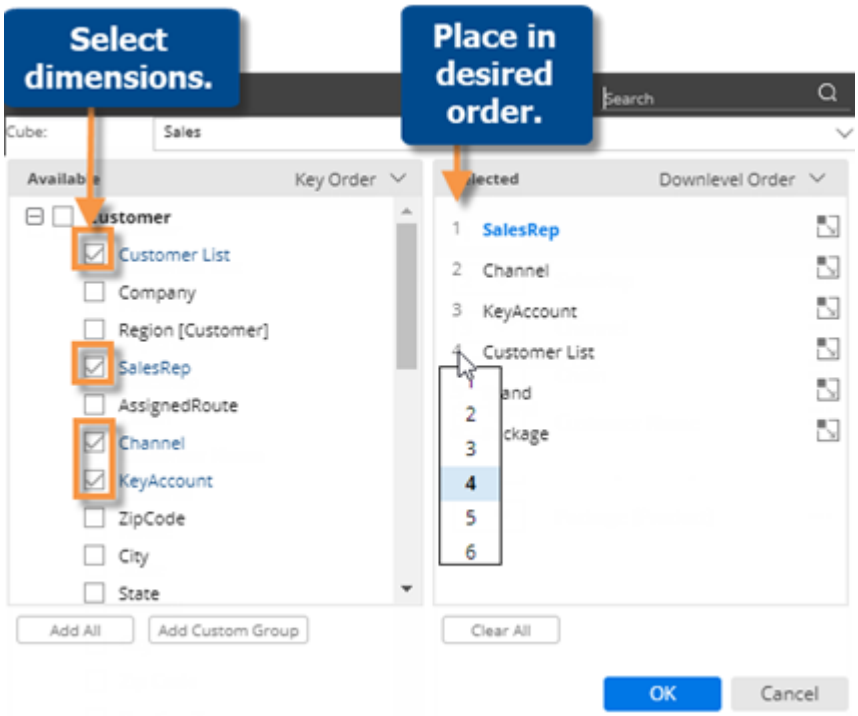
1. Click the By in the breadcrumb path (underlined). If the widget only has one Group By dimension, this will take you directly to the Group By area (see below).
2. In the pop-up menu, click on a number and select from the drop-down to adjust the drill order, or click and drag to place dimensions in the desired order. If you do not see a dimension in the list, click on **Edit Group Bys** to access all available dimensions (see below).
3. Click **OK**



To edit the Bys

After clicking on the **Edit Group Bys** button in the menu (see above), you can access all dimensions.

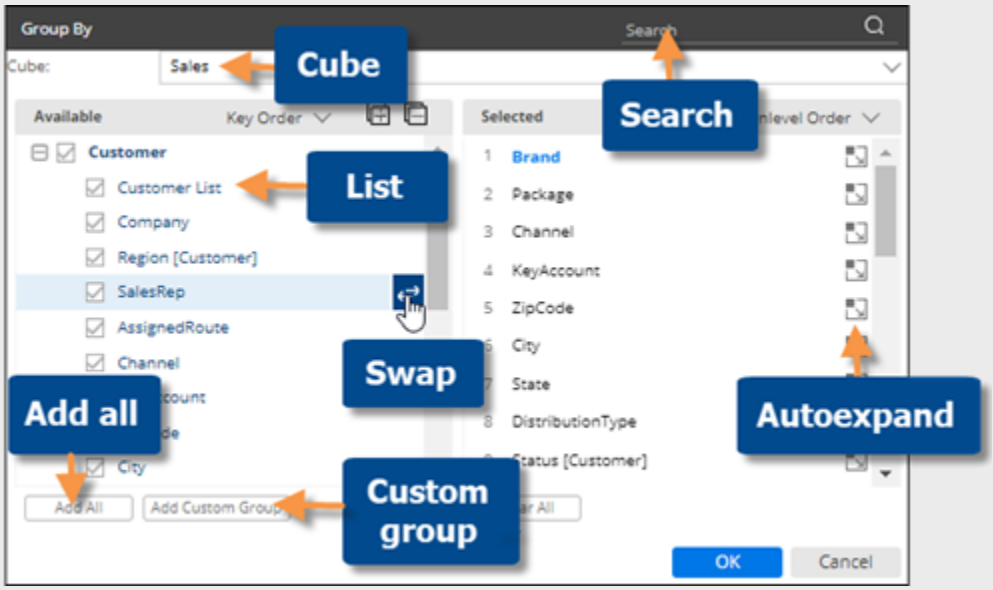
1. Check the box(es) of the dimension(s) you wish to use for grouping the data at any level (1st By, 2nd By, 3rd By, etc.). If the desired By is not listed, you may need to change the data cube at the top of the window.
2. In the right pane, place the selected dimensions in the desired order for grouping data, drilling, and expanding members. You can drag and drop dimensions or click the dimension's number to select from a menu.
3. Click **OK**.



Tips:

In the Group By window:

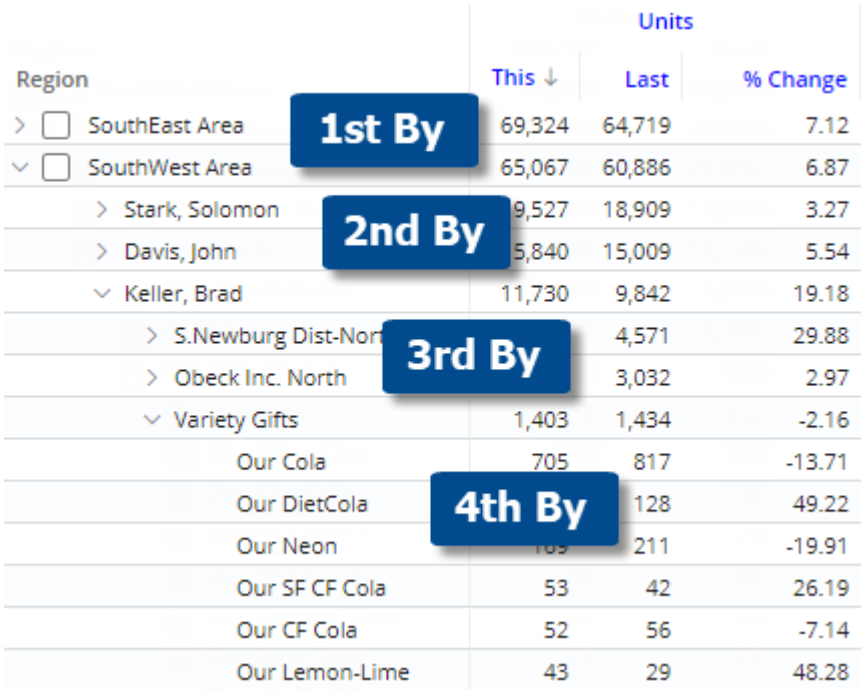
- You can swap the selected dimension in the right pane with an available dimension in the left pane to quickly add it.
- You can add all dimensions using a button.
- To view key-level details (e.g., customers), group the data by the "List" option.
- To view record-level details, group the data by Record Details, which is located after all keys/dimensions in the left pane.
- You can add a custom group to create your own custom method for grouping and comparing data.



Expand data

Tree expansion

In standard grids that compare members, you can expand one or more members to see subgroupings underneath them. You can expand the 1st By dimension to see the 2nd By, the 2nd By dimension to see the 3rd By, etc. You can expand members individually or auto-expand all members of a dimension (only available in some analysis types).



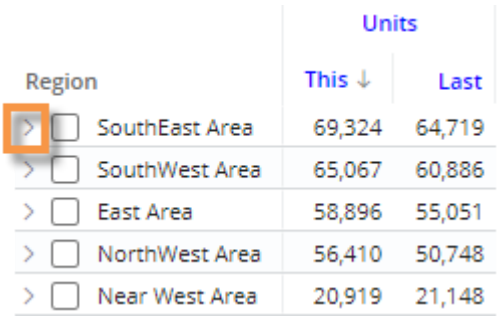
Region	Units		
	This ↓	Last	% Change
SouthEast Area	69,324	64,719	7.12
SouthWest Area	65,067	60,886	6.87
Stark, Solomon	9,527	18,909	3.27
Davis, John	5,840	15,009	5.54
Keller, Brad	11,730	9,842	19.18
S.Newburg Dist-Nort		4,571	29.88
Obeck Inc. North		3,032	2.97
Variety Gifts	1,403	1,434	-2.16
Our Cola	705	817	-13.71
Our DietCola		128	49.22
Our Neon		211	-19.91
Our SF CF Cola	53	42	26.19
Our CF Cola	52	56	-7.14
Our Lemon-Lime	43	29	48.28

To expand members individually

Click the › arrow beside the member(s) that you want to expand.

You can expand additional levels of data (e.g., 2nd By, 3rd By, etc.) if you wish.

Tip: The widget must have multiple Group By dimensions; otherwise, the › arrow is not available.



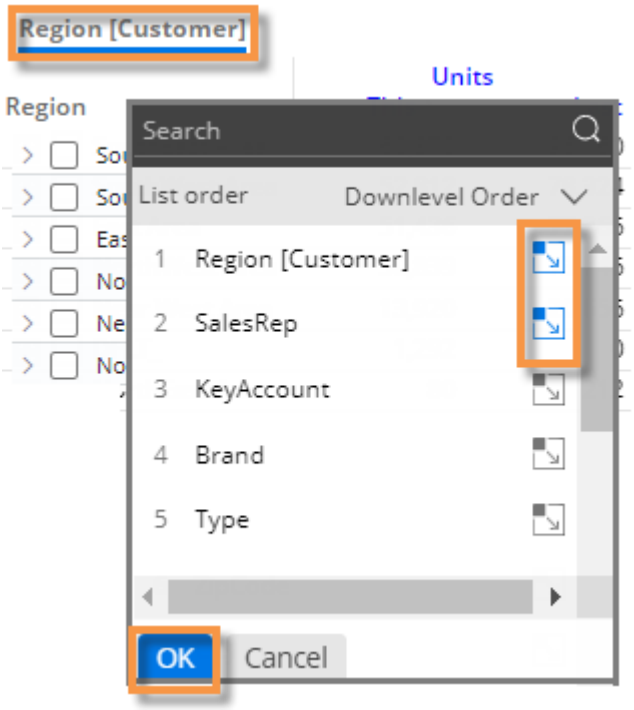
Region	Units	
	This ↓	Last
SouthEast Area	69,324	64,719
SouthWest Area	65,067	60,886
East Area	58,896	55,051
NorthWest Area	56,410	50,748
Near West Area	20,919	21,148

To auto-expand all members of a dimension or key

(only available in Comparative, Multi Comparative, and Mix grids)

1. Click the By in the breadcrumb path (underlined).
2. In the pop-up dialog, click the button beside the dimension(s) and/or key(s) that you want to expand to the next level. The icon is blue when auto-expand is on.

   If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.
3. Click **OK**.

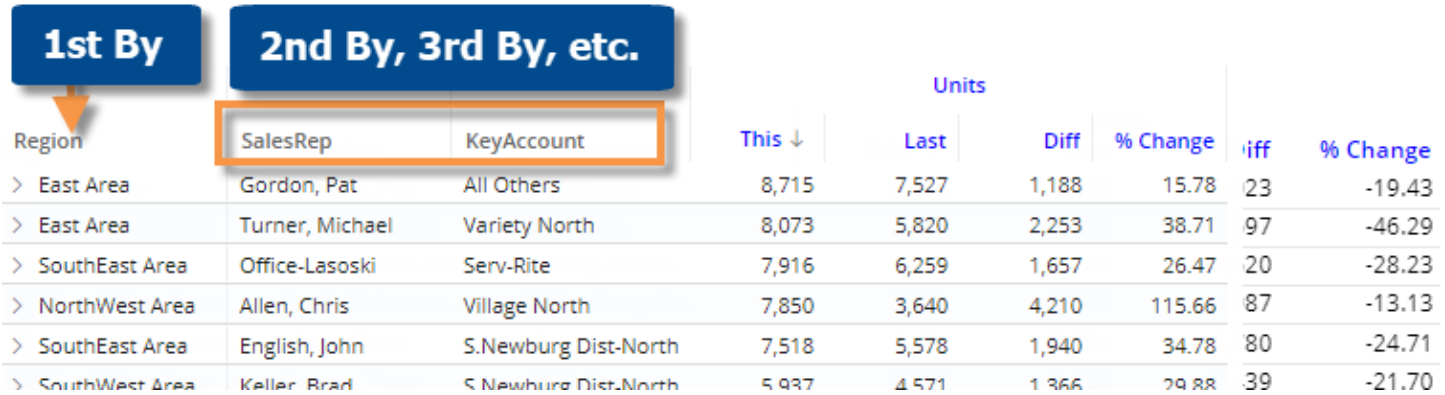


Tip:

Depending on the grid page size, you may not be able to see all available 2nd By dimension members at once. In this case, you can increase the grid page size or change the sort (see page 37) to bring the desired members closer to the beginning of the list.

Auto-expansion in flat view

In a "flat" view, dimensions and keys can be expanded into columns to provide detailed, cross-key information. Each unique combination of members (i.e., attributes) has its own row. You can interact with rows by drilling, sorting, and more, to investigate performance.



To expand in a flat view

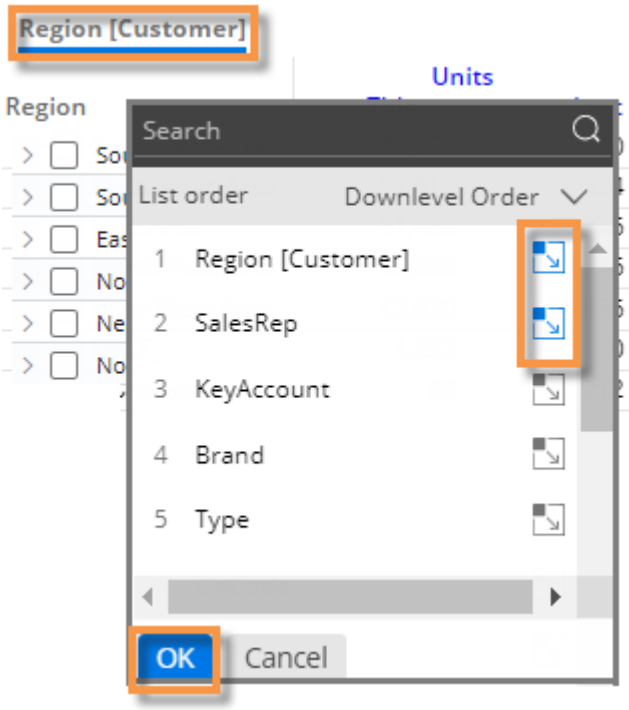
1. Start with one of the following widget types in grid format: Comparative, Multi Comparative, or Mix. The grid type should be "flat view." The grid type is pre-built into the dashboard. You can also select the grid type (see page 73) in explore mode.
2. Select dimensions and/or keys.

   - Click the By in the breadcrumb path (underlined) or open the Group By area in the toolkit.

   - Place dimensions and/or keys in the desired order. This will control the order of columns in flat view (e.g., 1st By will be first column).

   - Click the button beside the level(s) that you want to auto-expand (i.e., show next dimension as separate column). The icon is blue when auto-expand is on.

   - Click **OK**.



Tips:

If you skip a level for auto-expansion, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.

You cannot auto-expand down to record details; instead, drill down, change the Group By, or expand items individually.

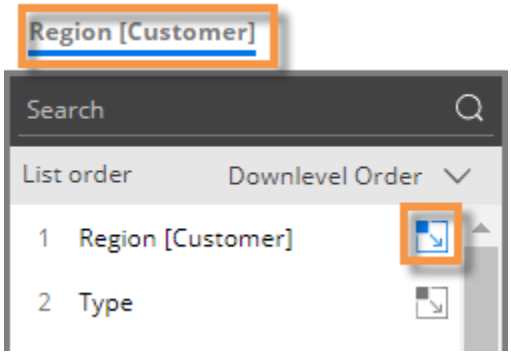
Auto-expansion in graphs

In some graphs, dimensions and keys can be expanded to see granular results. In Comparative and Multi Comparative graphs (see below), you can expand data to visualize performance of subgroupings. Mix graphs (see page 32) can show pie slices for subgroupings—in either a "sunburst" format or as independent pie slices. You can also expand data in a Trellis.

Expand data in Comparative/Multi Comparative graphs

1. Go to a Comparative or Multi Comparative graph. In general, horizontal bars can display more data than vertical bars when data is expanded.
2. In the Group By menu (see page 25) or toolkit area, turn on auto-expand for the top level (1st By) and additional levels if desired. The icon is blue when auto-expand is on.

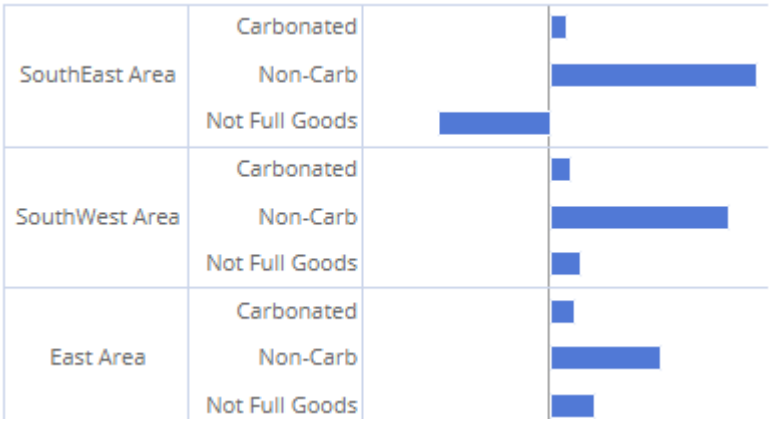
   If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.



The data layout depends on the underlying grid type (see page 73), which can be changed in explore mode:

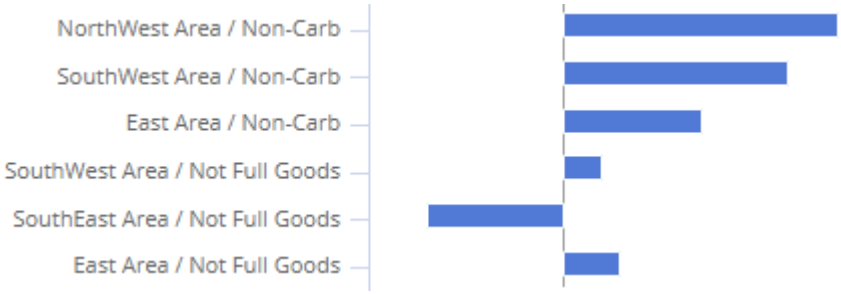
Comparative/multi comparative graph with "standard" grid type

This graph shows subgroupings within the parent-level.



Comparative/multi comparative graph with "flat view" grid type

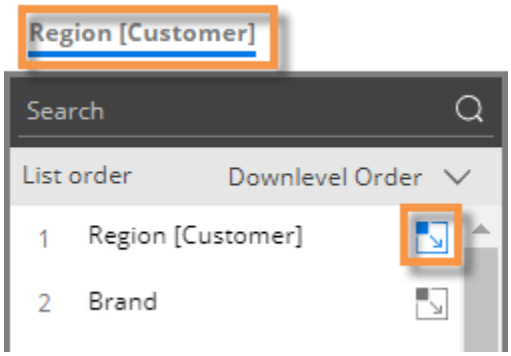
This graph has separate bars at the same level for each unique combination. Bars can be sorted independently of the parent level.



Expand data in Mix graphs

1. Go to a Mix graph.
2. In the Group By menu (see page 25) or toolkit area, turn on auto-expand for the top level dimension (1st By) and additional levels if desired. The icon is blue when auto-expand is on.

   If you skip a level, the view will stop expanding members at that level; however, auto-expansion may resume at a lower level after you drill, manually expand members, or change the By, if the new By is auto-expanded.

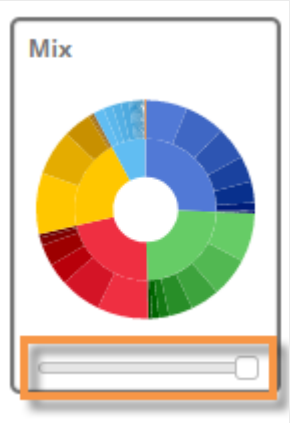


The data layout depends on the underlying grid type (see page 73), which can be changed in explore mode:

Mix graph with "standard" grid type (Sunburst)

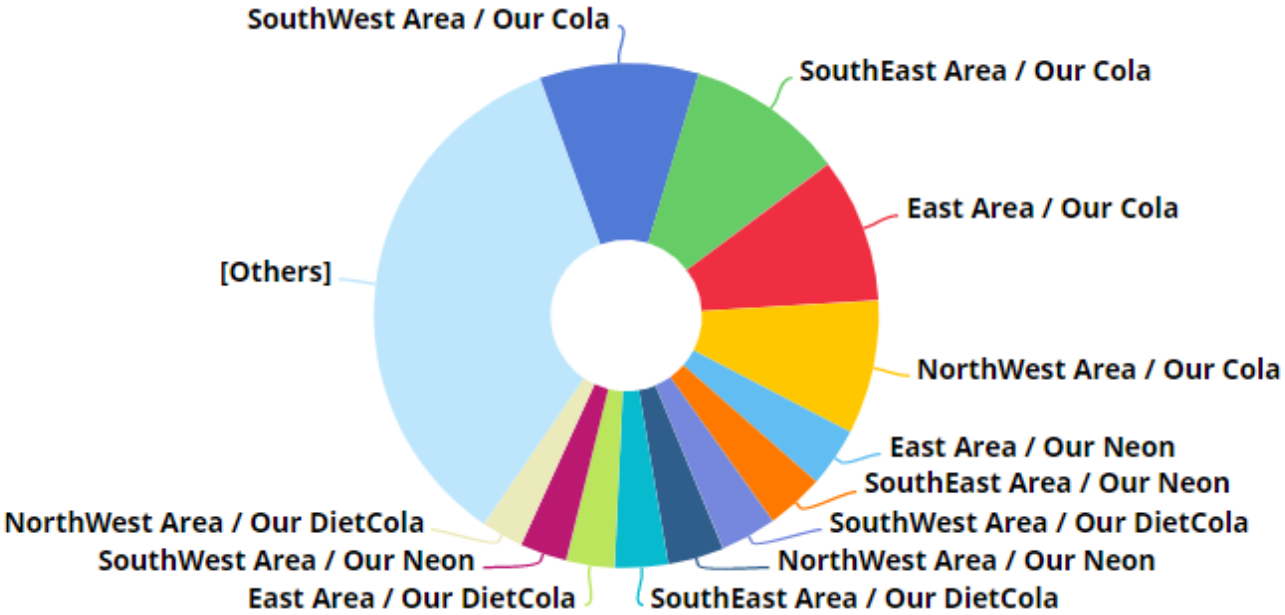
This graph shows the hierarchy and magnitude of data in a "sunburst" chart. The center ring represents the top-level data (1st By); the data becomes more granular as you move outward. For example, the next ring represents the 2nd By. The slices are sized based on data values and aligned with their parent level to show how much each piece contributed (e.g., brands within each region) .

Tip: For a sunburst, we recommend setting the **Graph Page Size** to a large number; otherwise, the pie may only show a subset of the data. To set the graph page size, use the slider at the bottom of the graph (i.e., drag the slider all the way to the right).



Mix graph with "flat view" grid type

This graph has separate pie slices for each combination of members. The pie slices are at the same level to show each unique combination's contribution to the total.

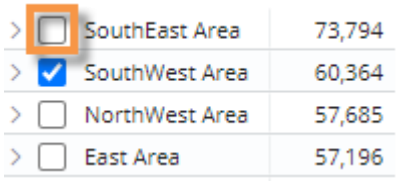


Check members

In standard grids that compare members, you can selectively checkmark any dimension members or key members to view their subtotals, drill down on them, show the checked members in graphs, and more.

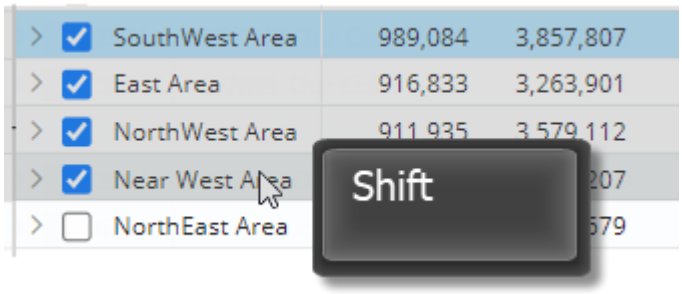
To checkmark members individually

Click the ☐ box(es) beside the member(s).



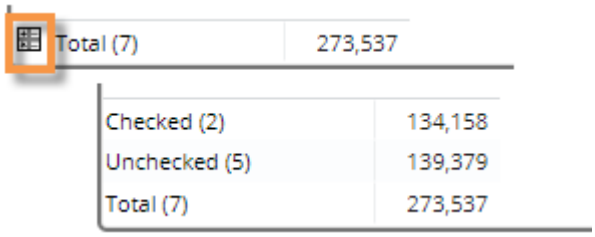
To checkmark a range (i.e., block) of members

1. Click on the top row of the desired range to select it. If you do not select a row, the grid will use the first row by default.
2. Press **Shift** as you click on the bottom row of the desired range.

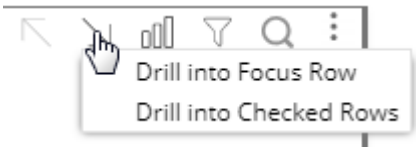


After checking members:

You can view subtotals by clicking the subtotal button at the bottom of the widget.



You can drill down on the checked members by clicking the Downlevel button and selecting Drill into Checked.

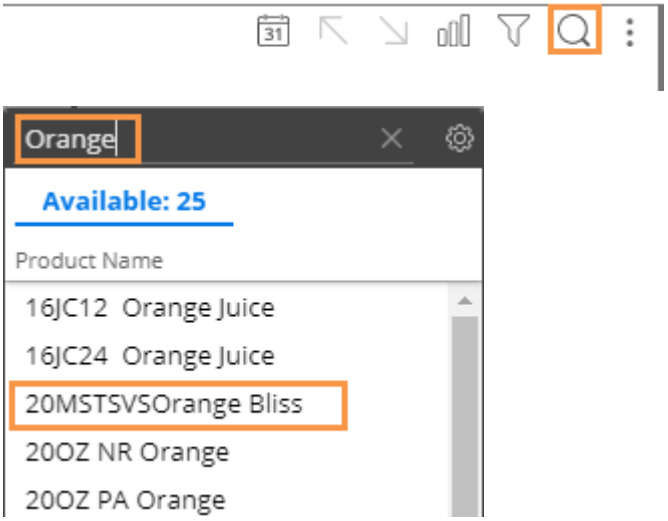


Search

You can perform a search to find specific items in widgets that list multiple members. The search looks in the current page and any additional pages of data.

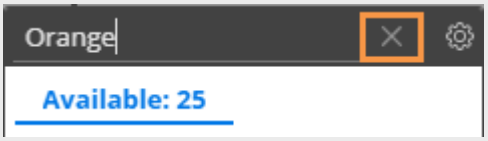
To search

1. Click the button at the top of the widget (visible on mouseover).
2. In the Search window, type some or all the characters in the item you want to find.
3. The window automatically returns a list of the member(s) that meet the criteria.
4. Click on the desired member to go to that item in the widget.

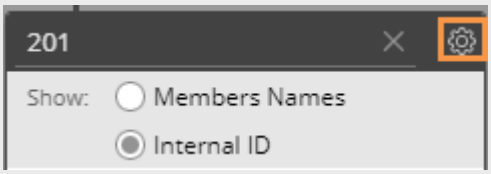


Tips:

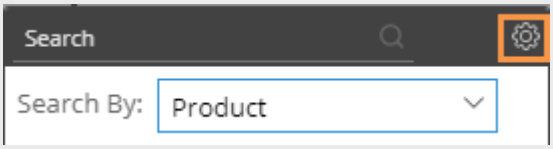
To reset the search, click the **x** button at the top of the Search window.



By default, the search looks for matching items based on their names. To search by code, click the button and choose Internal ID.



In key lists, the search uses the first description (e.g., customer name) by default; however, you can click the button to search by a different description or the key code. To search by the key code, select the name of the key.



Searching is not available in flat views.

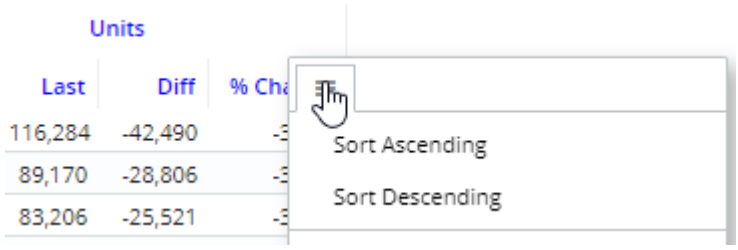
Sort

You can sort data to rank results. In most widgets, you can sort by values, difference, percent change, names, host codes, etc.

To choose the primary sort

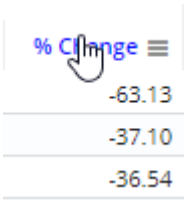
Option 1:

1. Place your cursor over the heading or subheading of the column by which you want to sort.
2. Click the menu icon ☰.
3. In the pop-up menu, select a sort option.



Option 2:

Click the heading to sort by that column; click again to reverse the sort order.

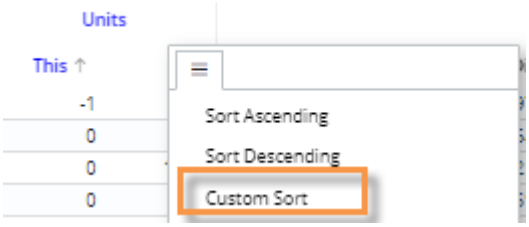


Additional sort levels (custom sort)

To control the order of members with matching values (e.g., zeros or matching names) for the primary sort, you can set additional sort levels.

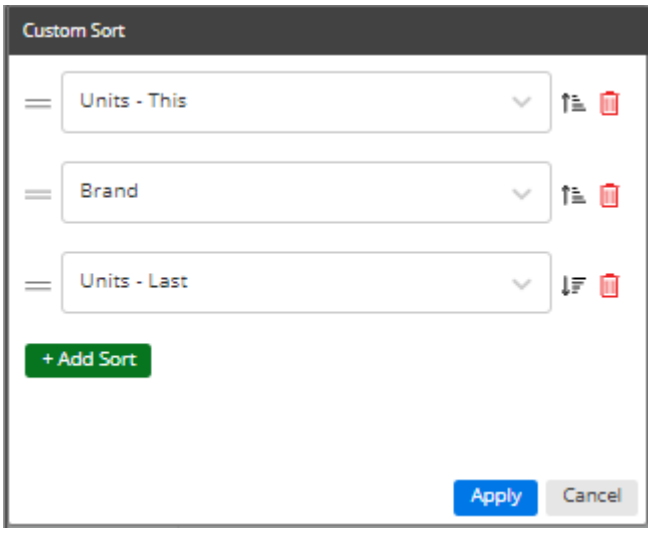
To set more sort levels (custom sort)

1. Place your cursor over a column heading.
2. Click the menu icon ☰.
3. In the pop-up menu, select **Custom Sort**.



To set more sort levels (custom sort)

4. In the Custom Sort dialog, click + Add Sort to add a sort level(s).
5. For each level, select the column by which to sort and choose ascending or descending. To rearrange levels, click and drag the icon.

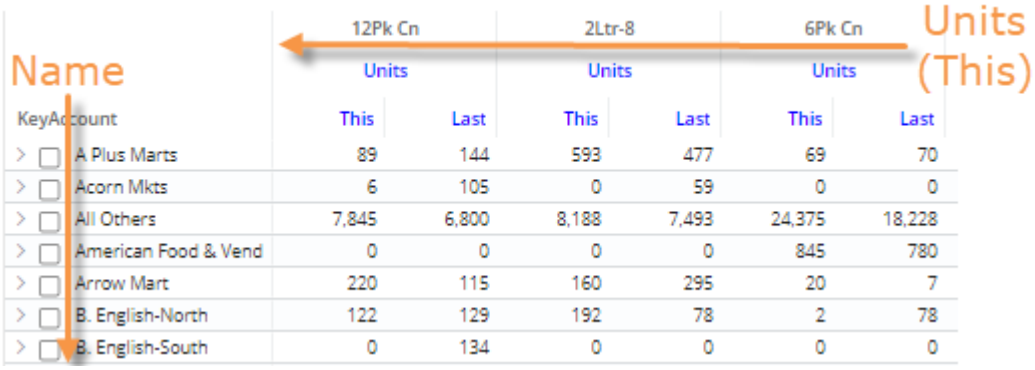


Any rows that have the same values for the primary sort will be ranked according to the secondary sort; any rows with the same primary and secondary sort values will be ranked according to the 3rd sort level; and so on. For example, list products that didn't sell this month (zeros), grouped by brand and then ranked by sales for last month.

Brand	Package	This ↑	Last
Our Cola	8PkCnsPa	0	1,230
Our Cola	8Pk Cans	0	923
Our Lemon-Lime	16Oz NR	0	319
Our Neon	8PkCnsPa	0	443
Our Neon	8Pk Cans	0	263
Our New Diet	16PNR8	0	668
Our New Diet	8PkCnsPa	0	190
Our New Diet	16PNR8Pa	0	167
Our New Diet	24Oz NR	0	163

Crosstab sorting

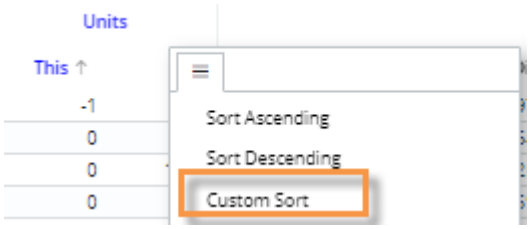
By default, Crosstab widgets use the same sort method for rows and columns; however, you can choose different sort methods if you wish. For example, you could sort rows (accounts) by name and columns (packages) by sales units. (Note that the sort is based on total values.)



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

To sort Crosstab widgets

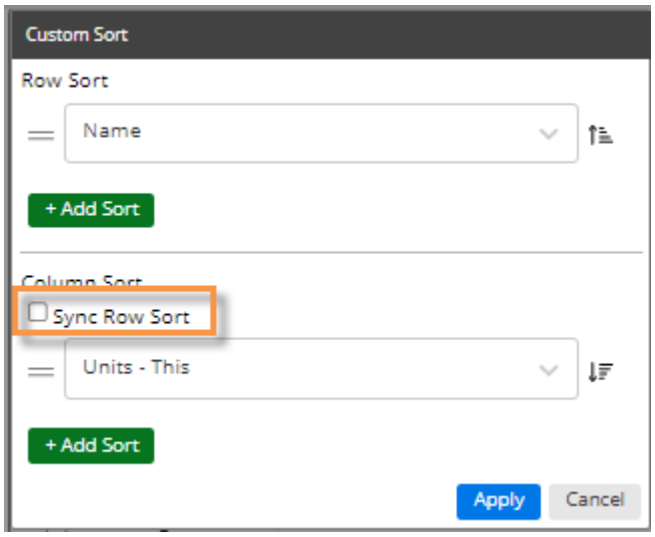
1. Place your cursor over a column heading in a Crosstab grid.
2. Click the menu icon ☰.
3. In the pop-up menu, select Custom Sort.



4. In the Custom Sort dialog, leave **Sync Row Sort** checked to use the same sort method for rows and columns. Then choose sort options.

   OR

   Clear the **Sync Row Sort** box to use different sort methods. Then, choose how to sort rows and columns. For each sort, you can select the measure, add sort levels (for matching values), and toggle between ascending and descending.

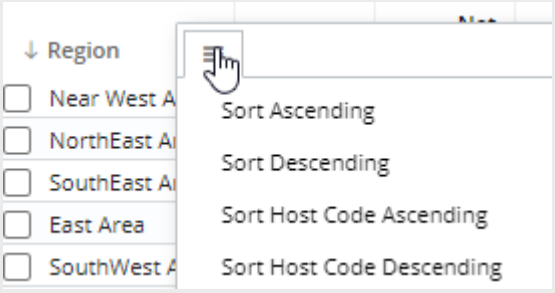


Tips:

To sort a graph, switch to the grid format and then perform these same tasks; then switch back to the graph.

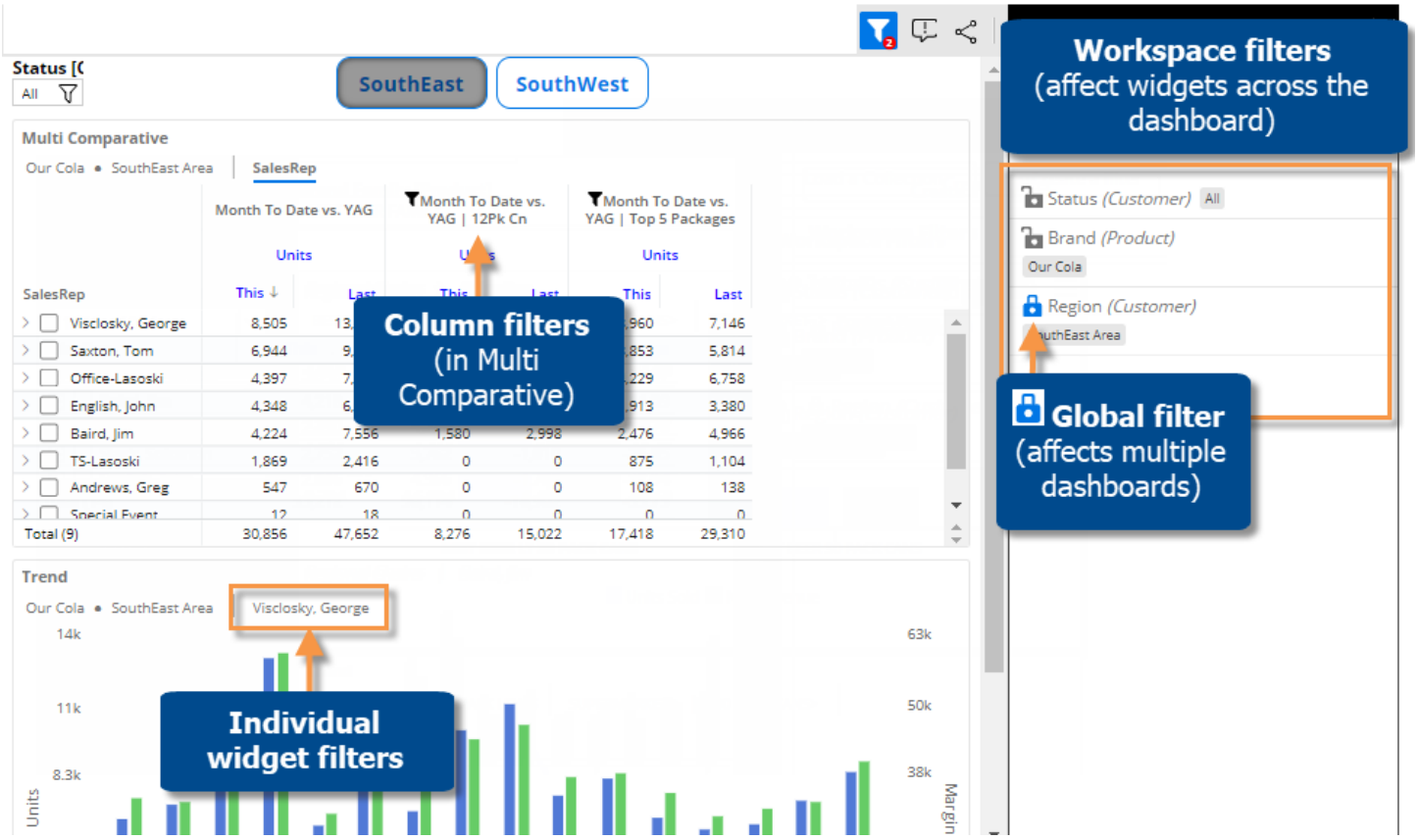
When sorting by dimension member, additional options are available in the menu. You can use either sorting method even if host codes are not currently displayed.

- **Sort Ascending/Descending** uses dimension member names.
- **Sort Host Code Ascending/Descending** uses dimension member codes.



Filter

Filters allow you to narrow down on the exact information needed. You can filter data globally as you use different dashboards, filter across a single dashboard (e.g., workspace filters), filter an individual widget, and apply a filter to a column (in Multi Comparative widgets). Filtering methods include simple menus to select one or more members, saved sets of members (i.e. collections), and dynamic filtering based on tests.



Breadcrumb path

The breadcrumb path at the top of the widget shows the filters currently applied. Just click on a filter in the breadcrumb path to edit or remove it.

Tip: The breadcrumb path does not show filters based on collections, filters based on user account rights (e.g., password collections), or column filters. However, you can place your cursor over the title bar to see a tooltip that shows all filters.

Collections are saved sets of members. Collections can be applied to a single widget or the workspace (i.e., all widgets) to filter the data. If the collection is applied to a single widget, it is considered to be a "widget filter"; if the collection is applied to the workspace (i.e., workspace filter), it filters across the dashboard.

Dynamic filters are based on test criteria (e.g., volume greater than zero) rather than a static set of members. When a dynamic filter is applied to a widget, the Salient Dashboards application runs a test and filters out data for members that do not meet criteria. This type of collection is only available for key members (e.g., customers). Dynamic filters may be saved as dynamic collections so they can be reused and shared.

Workspace filters

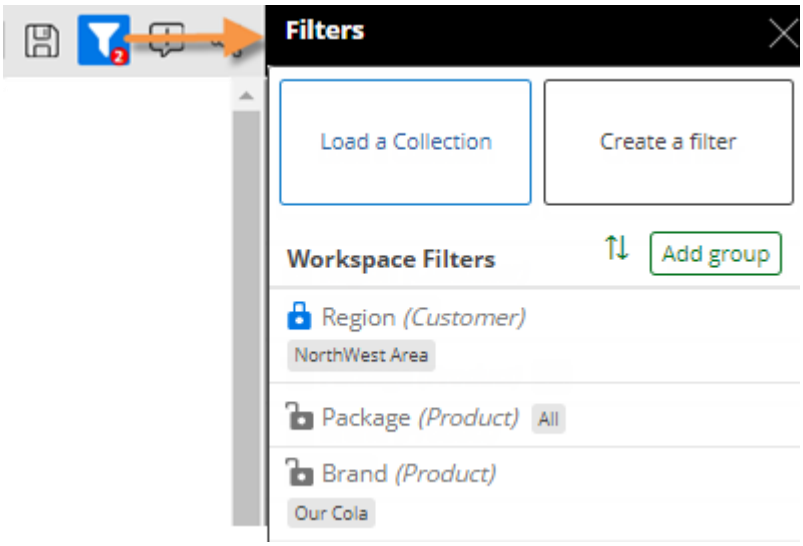
A workspace filter affects widgets across the dashboard. A filter panel provides streamlined access to these filters.

To use workspace filters

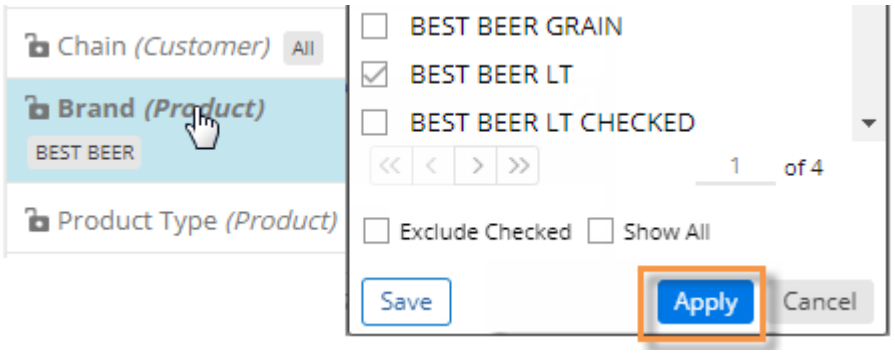
Click  at the top of the screen to open the filter panel (*keyboard shortcut: f*). This button is blue when the filter panel is open.

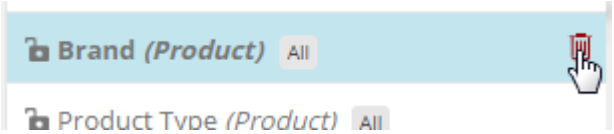
Tips:

- The red number  indicates how many workspace filters are currently on (does not include filters set to "All").
- A contrasting symbol  or  means that at least one global filter (see page 45) is turned on.



In the filter panel, choose from existing workspace filters or create a new workspace filter (see page 43).

Option	Instructions
Make a filter selection (e.g., select a different member)	Click on the workspace filter and make your selections in the pop-up window. Click **Apply**.  **Tips:** • By default, the window only shows members with data in the current context. You can click **Show All** in the dialog to list all members. • You can import a file (see page 62) to quickly filter on a list of members. Click  at the top of the pop-up window to access this option.

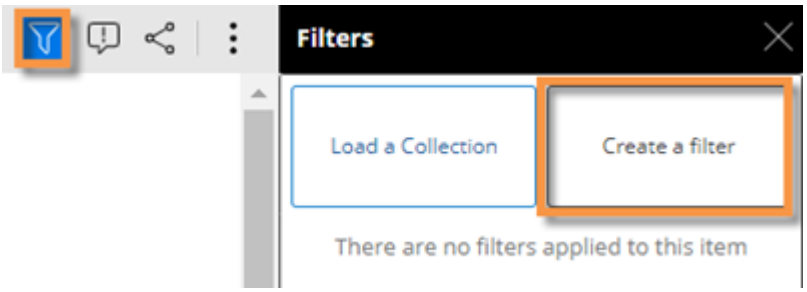
Option	Instructions
Reset a filter	Place the cursor over the filter and click the **X** button. The filter will still be present but will show data for all members. 
Remove a filter	Reset the filter as explained above. Then, place the cursor over the filter and click the button. 

Create workspace filters

You may want to build workspace filters into the dashboard to make filter selection easier for users.

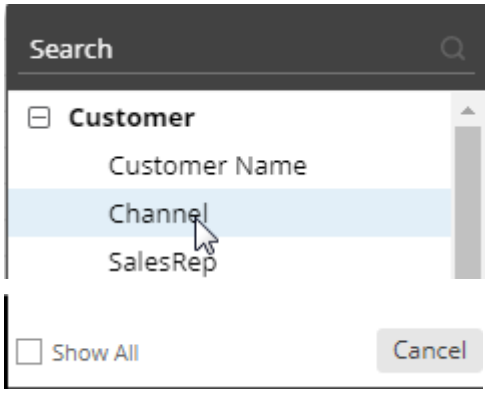
To create workspace filters

1. Click the at the top of the dashboard screen to open the filter panel.
2. Click **Create a filter**. This option allows you to select members from a menu. If you prefer, you can filter on a collection of members (see page 48).



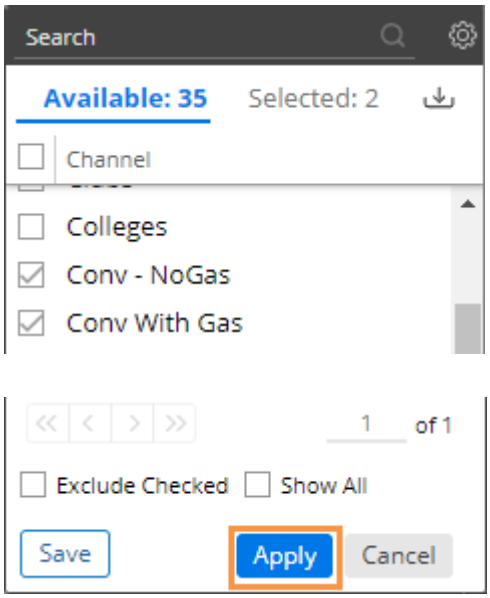
3. Select the dimension for which to create a filter.

   If you do not see the dimension listed (in view mode): Check the **Show All** box to access dimensions besides those that were built into the dashboard.



To create workspace filters

4. Checkmark the member(s) to filter on.



Tips:

- The **Exclude Checked** option lets you show data for all members except the selected members.
- You can import a file (see page 62) to quickly select members. Click at the top of the selection window to access this option.
- You can optionally click **Save** to create a collection of the checked members so that they can be reused later.

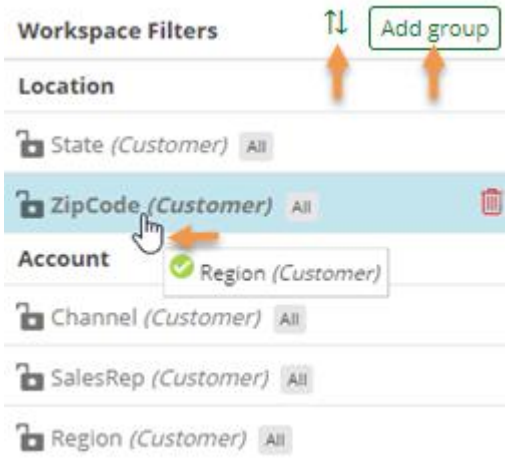
5. Click **Apply**.
6. Repeat steps 2 through 5 to create additional workspace filters if you wish.

7. *(Optional)* Organize the filters by arranging them in groups, sorting them, and/or reordering them (drag and drop).

   Group: Click **Add group** at the top of the panel and enter a custom name for the group; then drag it to the desired location and arrange filters underneath it.

   Sort: Click the icon at the top of the filter panel and then select an option. To switch from ascending to descending order, select the option again. When used with groups, these options sort the filters underneath each group.

   Reorder: Drag and drop a workspace filter to move it up or down in the list. To move an entire group, press Shift as you drag and drop it onto another group.



Tip:

If the data cube of a widget does not include the key/dimension of the filter, then the filter is not applicable and, therefore, does not affect the widget. For example, if the widget shows weather data that is only associated with a customer key, then a product filter, such as brand, will not affect the widget.

Global filters

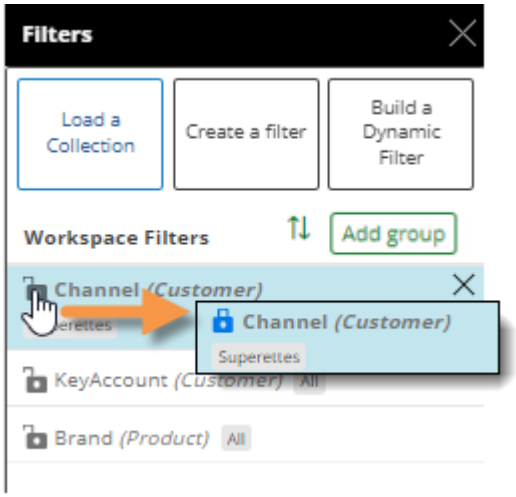
A global filter is a workspace filter that is "locked" so that it stays on when you open other dashboards. You can access these filters using the filter panel just like other workspace filters.

To turn on a global filter

1. Click the button at the top of the dashboard screen to open the filter panel.
2. In the filter list, locate or create the filter you want to turn on globally.
3. Click the lock/unlock button to "lock" the filter. The locked symbol is blue.

When you open another dashboard, it will automatically use global filters. Note that only applicable global filters will be applied (i.e., attribute matches a "Group By" in the dashboard).

Tip: The filter button at the top of the screen shows a contrasting filter symbol if global filters are on: if panel is closed; if panel is open

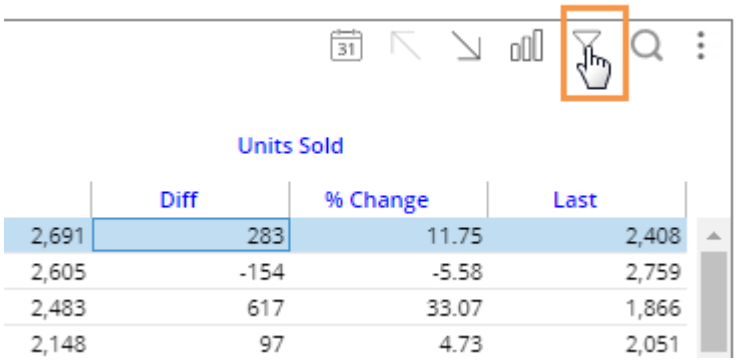


Individual widget filters

Individual widget filters let you filter data in a specific widget without affecting the entire dashboard.

To create a widget filter

1. Click the filter button at the top of the widget (visible on mouseover if enabled).



To create a widget filter

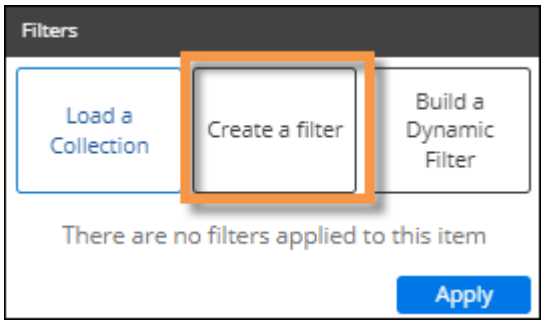
2. In the pop-up dialog, click **Create a Filter**.

   Other options may be available:

   • **Checked** - If the widget has checked members, you can filter on them.

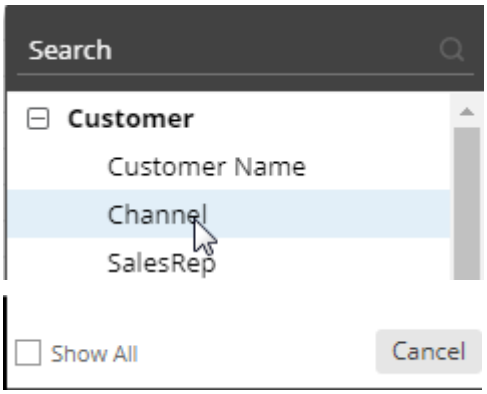
   • **Load a Collection** - You can filter on a saved collection of members (see page 48).

   • **Build a Dynamic Filter** - You can filter based on test criteria (see page 49).

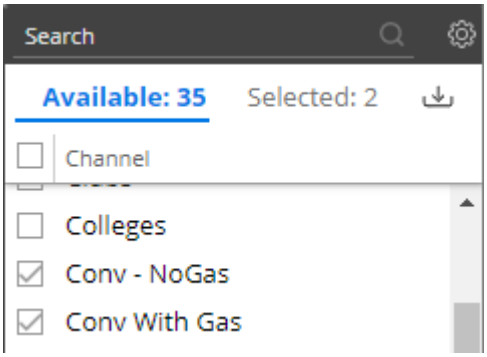


3. Select the dimension (i.e., attribute) for which to create a filter.

   If you do not see the dimension listed (in view mode): Check the **Show All** box to access dimensions besides those that were built into the widget.



4. Checkmark the desired member(s).



Tips:

• By default, the filter choices only include members with data in the current context. If you wish, you can check **Show All** to list all members.

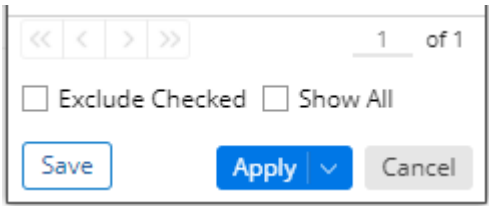
• The **Exclude Checked** option lets you show data for all members except the selected members.

• You can import a file (see page 62) to quickly select members. Click at the top of the selection window to access this option.

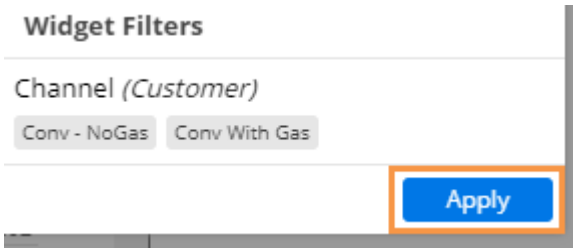
• You can optionally click **Save** to create a collection of the checked members so that they can be reused later.

To create a widget filter

5. Click **Apply** to apply the filter to the selected widget only.



6. Click **Apply** again in the filters area.



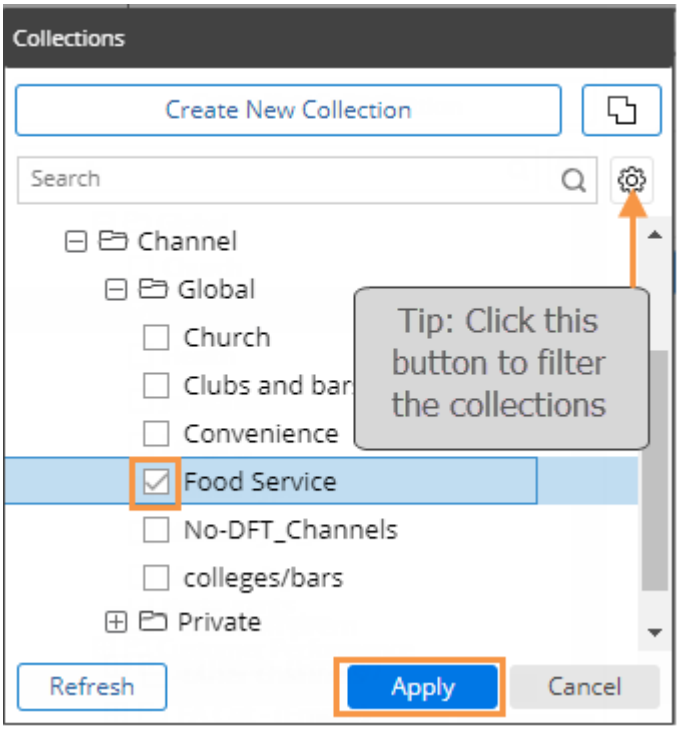
Filter data by a collection

Collections can be applied to a single widget, individual column, or the workspace (i.e., entire dashboard) to filter the data by a saved set of members.

To apply a collection as a filter

1. Do one of the following to open the filters area:
   - *To apply a collection to a single widget:* Click the filter button at the top of the widget (visible on mouseover).
   - *To apply a collection to the entire dashboard:* Click the filters button at the top of the screen to open the Filters panel. (Collections cannot be applied to the workspace in explore mode.)
   - *To apply a collection to an individual column (in Multi Comparative only):* Click the column header, and select Filter Date Range.
2. Click **Load a Collection**.

3. In the Collections dialog, locate the collection and place a checkmark beside it. You may need to expand a key, dimension, and category to find the collection. A search option is also available.
4. Click **Apply**.



Tips:

• If you select more than one collection within the same key or dimension, results will be limited to members that are common to all selected collections.

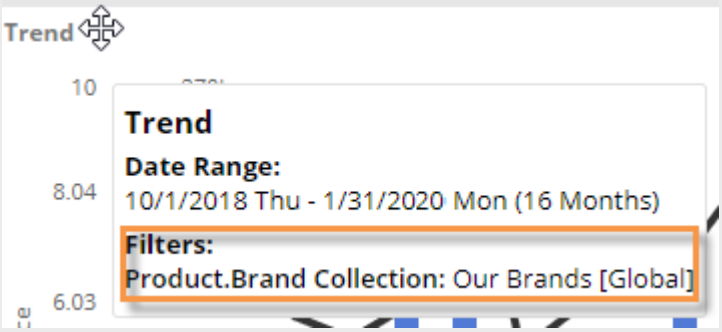
• The symbol represents a dynamic collection (see page 49). This type of collection updates dynamically based on test criteria.

• The symbol represents a dynamic collection that has been created in SIM. You can apply this type of collection but not edit it in Salient Dashboards.

• The button lets you merge multiple collections into a single new collection.

Tips:

The breadcrumb path does not show when collection-based filters are on, but the widget tooltip (shown when placing the cursor over the title bar) shows collection filters even if they are hidden in view mode.



Dynamic filters

Dynamic filters are based on test criteria (e.g., volume greater than zero). When a dynamic filter is on, the widget only includes data for the members that meet the test criteria. The filter updates automatically based on the data context rather than storing a static list of members. Dynamic filters may be saved as dynamic collections so they can be reused and shared.

To apply a dynamic filter

1. Go to the filters area for the widget or column:

   To apply a dynamic filter to a widget - Select the widget and click the filter button in its upper-right corner (visible on mouseover).

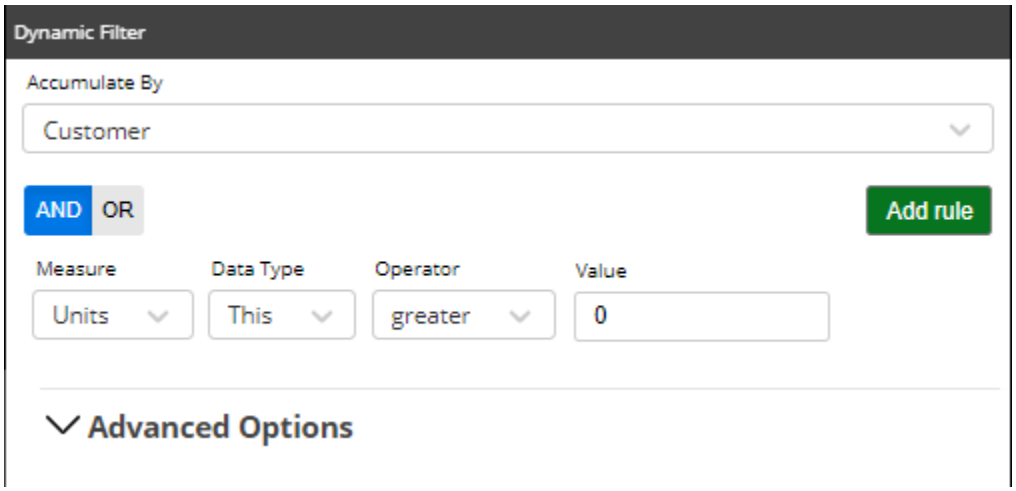
   To apply a dynamic filter to an individual column (in Multi Comparative only) - Click the column heading and select **Filter Date Range**.

2. Click **Build a Dynamic Filter**.

3. In the **Dynamic Filter** area, choose the key to test from the Accumulate By menu (e.g., create a cohort of customers that pass the test).
4. Set up one or more rules:

- Select the measure to test.
- Select the date range (This or Last) or the variance (Diff or % Change) you wish to test. By default, the date ranges correspond to the widget date ranges. For example, if the widget compares the month-to-date with the prior month, then a rule for "This" would look at the month-to-date and a rule for "Last" would look at the prior month. If the widget does not have a Last date range, then a rule for "Last" will default to one year earlier (YAG) than the "This" date range. If you prefer, you can test a different date range (i.e., something other than the widget date range) by changing the Advanced settings as explained below.
- Select an operator (e.g., greater than).
- Enter a value to compare against.
- To use multiple rules, click Add Rule, repeat the above steps, and choose AND or OR to control which rules must be met.

Tip: If the desired key or measure is not available, you may need to change the cube under Advanced Options.



5. Optionally, expand the Advanced Options area and choose settings to refine the test.

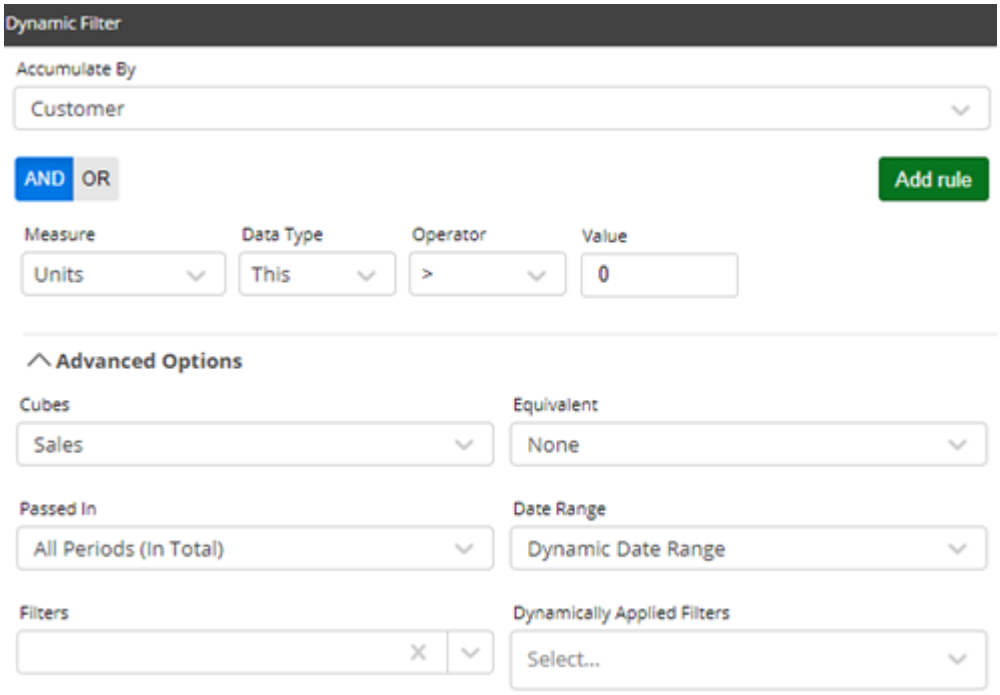
Advanced option	Explanation
Cubes	To test based on data from a different cube, select from the Cubes menu. This controls which keys and measures are available for selection.
Equivalent	To test data after it has been converted to equivalent units (if applicable), select from the Equivalent menu. An equivalent table selected here overrides an equivalent table applied to the widget.
Passed In	Choose the part of the date range to consider for the test. These options affect the outcome when the date range includes multiple units of time (e.g., 12 weeks). • All Periods (In Total) - looks at the entire date range (e.g., total of all 12 weeks). • First and Last Period - looks at the first and last units of time (e.g., 1st week and 12th week); both units of time are needed to pass the test. • First Time Period - only considers first unit of time (e.g., 1st week). • Last Time Period - only considers last unit of time (e.g., 12th week). • Any Period (Individually) - considers all units of time individually with only one unit of time needed to pass the test (any week). • All Periods (Individually) - considers all units of time individually with all units of time needed to pass the test (e.g., every week).

Advanced option	Explanation
Date Range	Choose the date range to test. • Dynamic Date Range (default) - When this option is on, the test will use the date range of the widget. For example, if the widget shows the month-to-date, the test will look at that month to determine which members pass. If the month updates over time (e.g., November to December) or the widget timeframe changes (e.g., one month to 6 months), then the test will automatically update to look at the new dates. • Specific Date Range - You can choose this option to test data for a specific date range, which can be different than the widget's date range. For example, you might want to find new products based on three months of data but look at data for a longer timeframe in the widget. After choosing this option, the date setup dialog will appear. You can then select the date range(s) for the test. Any "This" rules in the test will look at the "This" date range you select here; any Last" rules will look at the "Last" date range. The date range(s) can be fixed or update over time based on the current date (e.g. month-to-date). However, the resolution and number of dates used in the test will not change.
Filters	To filter the data used in the test based on a static selection of members, click the arrow beside the Filters menu and load a collection or create your own filter. This option will filter the data used in the test but will not directly filter the data shown in the widget. In addition, the filter will be static; it will not change if you adjust widget or workspace filters. For example, create a cohort of customers that bought more than 10 units of a specific brand. Also see the following examples. As in other areas of dashboards, you can combine multiple filters.
Dynamically Applied Filters	To dynamically filter the data used in the test based on filters that are applied to the widget, dashboard, and/or notifications, click the arrow beside the Dynamically Applied Filters menu and select the type of filter(s) to apply. Filter types include workspace filters, downlevel filters, widget filters, linked widget filters, and notification (i.e. per recipient) filters. In general, this option will filter the data used in the test and the data shown in the widget based on whatever is selected at the time. For example, create a cohort of customers that bought more than 10 units of whatever brand is selected. Also see the following examples and a notification example. For workspace filters, additional settings are available in the General Settings area to control what the workspace filters affect. • Use Workspace Filters - When this setting is on and "Workspace" filters are selected in the dynamic filter setup, the data shown in the widget is filtered and the data being tested is filtered regardless of the following setting (e.g., only show data for the selected brand for the customers that bought more than 10 units of the brand). • Always Apply Workspace Filters to Dynamic Filters - This setting is only applicable when Use Workspace Filters is off and "Workspace" filters are selected in the dynamic filter setup. In this case, you can turn on **Always Apply Workspace Filters to Dynamic Filters** if you do not want to filter the data shown in the widget but you do want to filter the data used in the test (e.g., show data for all brands for the customers that bought more than 10 units of the selected brand).

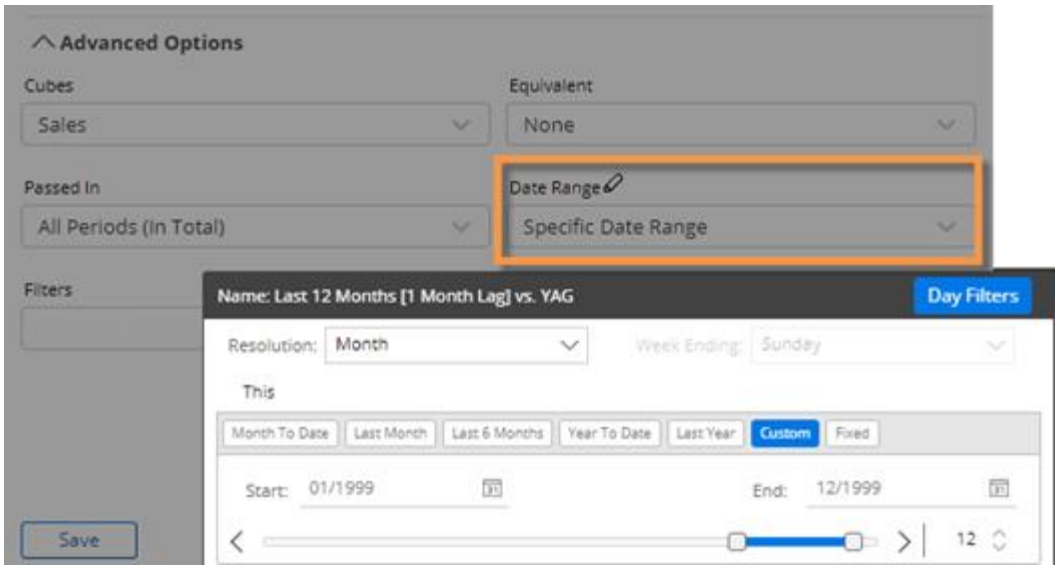
6. Do one of the following:
   - To immediately apply the filter without saving it, click **Apply**.
   - To save the filter as a dynamic collection, click **Save**. Note that this will save the test criteria rather than a list of members.

Example - Active customers

You could use a dynamic test to filter on active customers. In this example, a customer would be included if it had volume of greater than zero during This date range (based on the widget's This timeframe). Because no additional filters are applied (under Advanced), a customer would be considered active it it purchased any product.

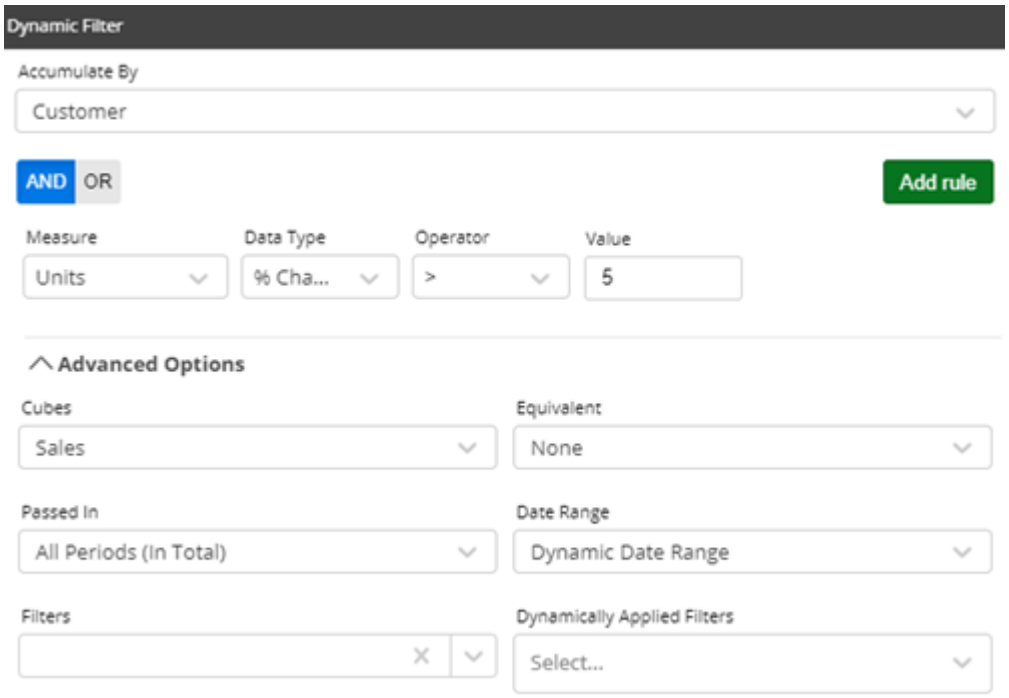


If your definition of an active customer is based on a more precise timeframe (e.g., sales during last 12 months), you could assign a specific date range that is not based on the widget date range. This would allow you to change the date range of the widget without affecting the test.

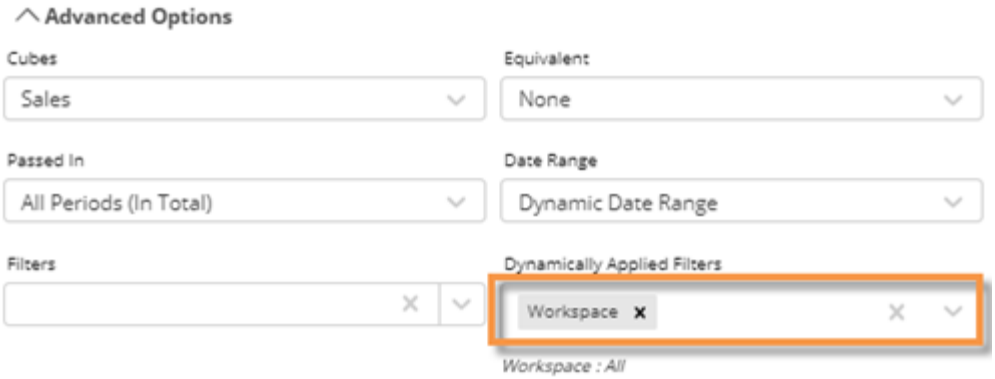


Example - Customers with increased sales

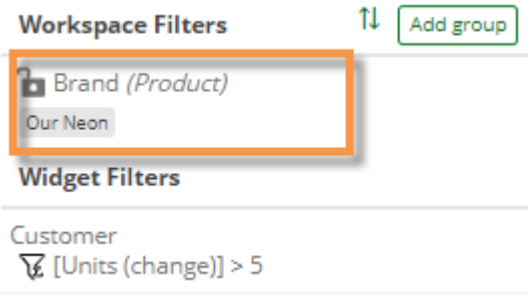
You could use a dynamic filter to focus on customers with significantly improved sales volume. In this example, a customer will be included if change in sales units is greater than 5% (based on the widget's This and Last timeframes). Because no additional filters are applied, the filter will look at overall sales for each customer.



Now suppose you are interested in customers with increased sales for a brand rather than overall sales. You could turn on dynamically applied filters in the advanced area to allow users to customize the test for whatever brand interests them. This example uses a workspace filter; other types of filters could be used for this purpose as well.



Then, add a workspace filter to the dashboard and select a brand.



By default, workspace filter will affect both the test and the data shown. As a result, the widget will will show sales of the selected brand (Our Neon) to customers that bought more of the brand (>5%) this period.

Our Neon **Customer List**

		Units			
Customer	CustName	This ↓	Last	Diff	% Change
11628	VARIETY NORTH #8022-01/V432596	1,193	893	300	33.59
70466	S NEWBURG DIST # 715	1,003	752	251	33.38
11901	VILLAGE NORTH CG/# 15	973	606	367	60.56
70469	S NEWBURG DIST # 935	776	632	144	22.78
70481	S NEWBURG DIST # 15555	699	510	189	37.06
11902	VILLAGE NORTH # 71	597	465	132	28.39

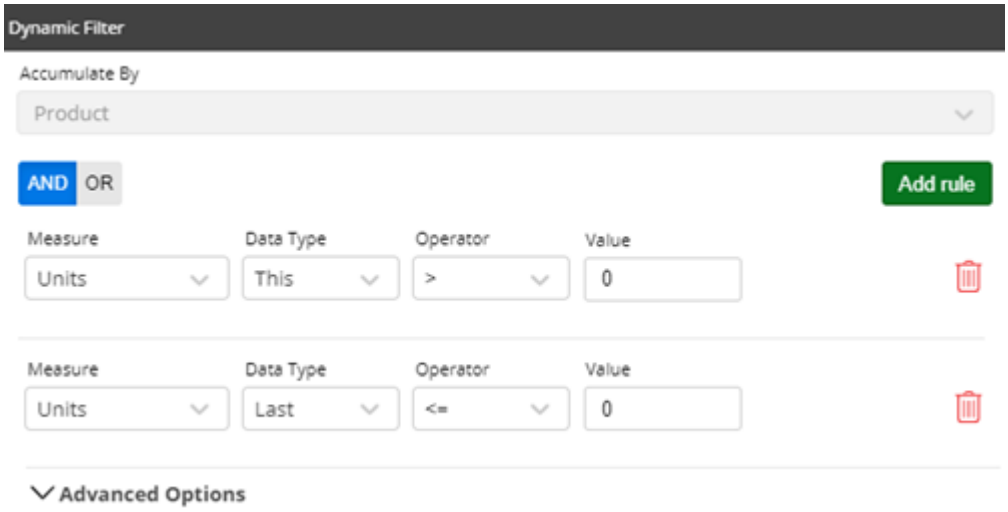
Because the filter is dynamically applied, the test will update if a user selects a different brand in a workspace filter. For example, view sales of spring water to customers that bought more spring water (>5%) this period.

Spring Water **Customer List**

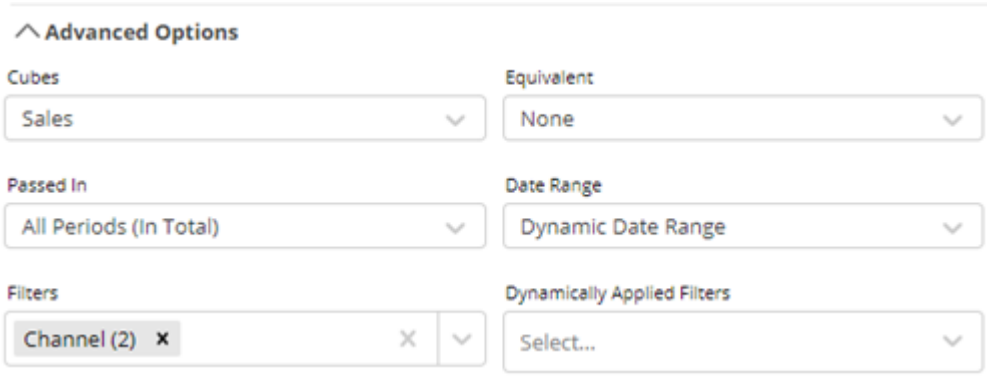
		Units			
Customer	CustName	This ↓	Last	Diff	% Change
06663	LINDLEY NE 2957-918289	52	18	34	188.89
70469	S NEWBURG DIST # 935	43	5	38	760.00
11623	VARIETY NORTH # 6232	37	31	6	19.35

Example - New products

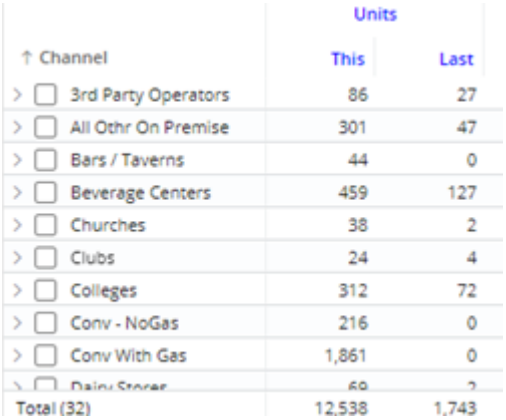
You could use a dynamic filter to find and analyze products that were recently introduced. In this example, a product would be included if it had volume greater than zero during This date range (based on the widget's This timeframe) and volume of zero or less during Last date range (based on the widget's Last timeframe).



Now suppose you are interested in products that are new to convenience customers (Conv - No Gas and Conv With Gas). You could use a filter in the advanced area of the test to find those products. Unlike the previous example, this test filter is static; it will always be based on sales to convenience channels.



When this setting is on, the test runs on the filtered data (e.g., sales for convenience stores only) but does not directly filter the data in the widget. In this example, the widget includes data for other channels, but the results are filtered on products that are new to convenience channels.



	Units	
↑ Channel	This	Last
3rd Party Operators	86	27
All Othr On Premise	301	47
Bars / Taverns	44	0
Beverage Centers	459	127
Churches	38	2
Clubs	24	4
Colleges	312	72
Conv - NoGas	216	0
Conv With Gas	1,861	0
Dairy Stores	69	2
Total (32)	12,538	1,743

Column filters (in Multi Comparative)

The columns in a Multi Comparative widget can be filtered on various subsets of data. The filters, date ranges, measures, and equivalents can be the same or different across columns. Any number of columns can be included to provide a customized view of performance. 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. The filtered data is also available when you switch to graph format.

	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
Regional Chains	87,307	18.54	35,909	29,847	20.31	38,902	2.26	80,345	20.11	5,365	-18.64
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
Mass Merchandisers	23,893	-27.25	10,975	15,990	-31.36	15,290	-40.53	23,059	-27.99	1,798	2.98
Other Groceries	20,611	4.06	8,880	7,889	12.56	3,185	88.46	17,308	8.88	7,557	-12.16
3rd Party Operators	14,376	-8.29	5,523	5,951	-7.19	201	55.81	12,165	-9.69	5,953	-16.47
Drug Stores	14,296	10.74	5,965	5,797	2.90	7,311	3.32	13,532	9.89	1,223	8.71
Local Chains	11,851	5.16	5,377	5,191	3.58	4,195	6.91	10,979	5.96	1,118	-18.45
Industrial	9,576	8.47	2,151	2,159	-0.37	1	-80.00	5,241	4.78	2,215	6.70
Superettes	9,020	-7.84	3,681	4,215	-12.67	2,349	-25.31	7,875	-10.14	1,551	-22.84

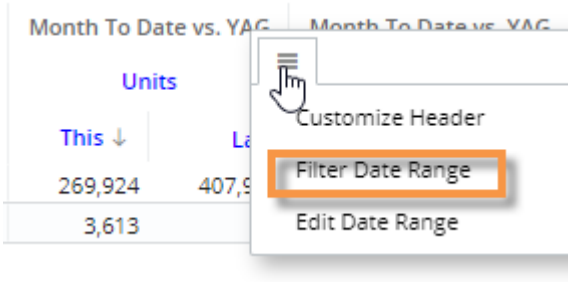
The following instructions explain how to filter individual columns. Column filters can also be set up to work with dashboard filters to compare whatever is selected to benchmarks, (see page 58) such as all, all others, or custom cohorts.

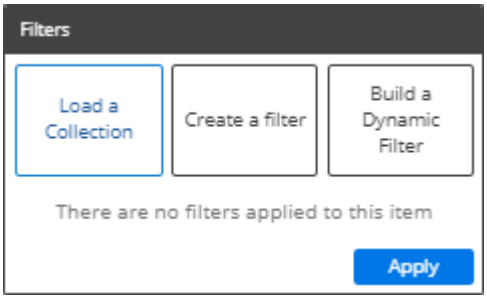
To apply a filter to a column

1. Add or select a Multi Comparative widget. Column filtering is only available in this widget type.

   - The widget must have at least one measure.
   - The widget must be in grid format.

2. Place the cursor over the main heading of the column to filter and click the ≡ menu icon.
3. Select **Filter Date Range**.
4. In the next menus, choose how to filter the column. These options are the same as those available for other types of filters. For example, you can filter on a saved collection (see page 48), create a new filter for any available dimension (see page 45), apply a dynamic filter (see page 49), etc.

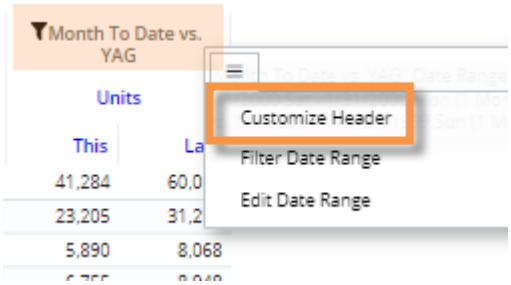




To apply a filter to a column

5. *(Recommended)* Customize the column header to indicate what the column is filtered on:

   - Place the cursor over the column and click the ☰ menu icon.
   - Select **Customize Header**.
   - Choose header options.



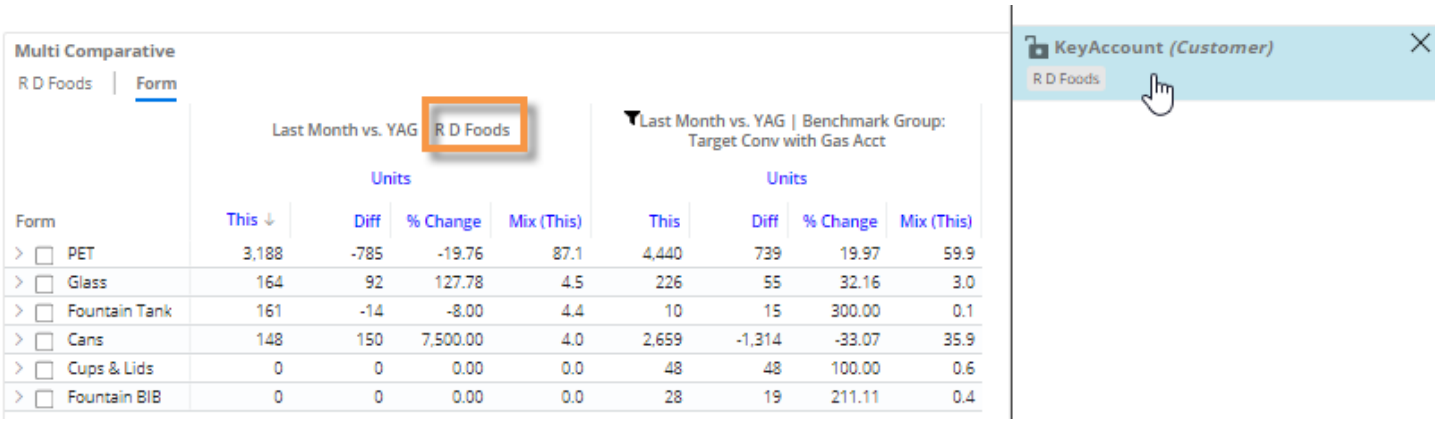
Tips:

• Column filters also allow you to apply equivalents to individual columns to compare converted data within a widget. Equivalents are available via the **Create a filter** option.

• Depending on the dataset configuration, you may be able to include custom calculations that compare one column to another (e.g., difference between one brand and all products). This feature requires temporal measures.

Benchmarking

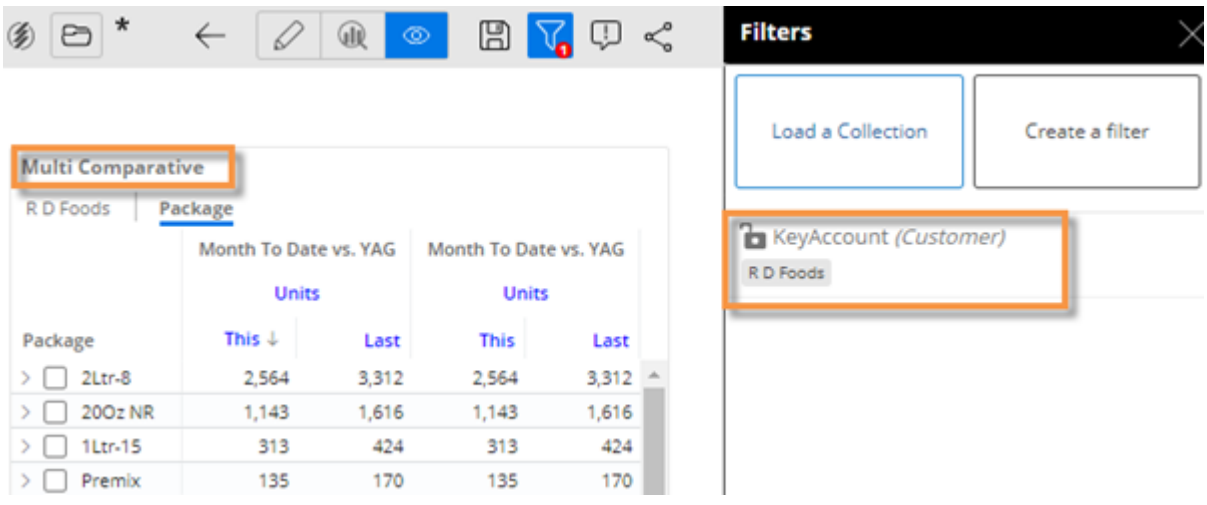
Benchmarking allows you to compare the performance of any part of your organization to other parts that represent standards and industry bests. In Salient Dashboards, you can dynamically benchmark performance of whatever is selected against "all", "all others", or custom peer groups (i.e., cohorts) using advanced options in Multi Comparative column filters. For example, compare a single account to all other accounts and/or a top-performing group of similar accounts. The results update dynamically based on whatever filter is selected at the time; just pick from the filter to benchmark a different part of the organization (e.g., a different account).



The filtered data is also available when you switch to graph format.

To compare performance to a benchmark

1. Add or select a Multi Comparative widget. Column filtering is only available in this widget type.
   - The widget must have at least one measure.
   - The widget must be in grid format.
   - The widget should have at least two date columns, which should typically use the same date (e.g. MTD vs. YAG) as each other to provide a direct comparison.
2. Apply a workspace filter to focus on the member (e.g., account) that you want to compare to a benchmark. The workspace filter may be applied via a filter widget, filter panel, or other method. To preview results as you work, select a member from the filter (e.g., a single account). A different member may be selected at any time; the columns will update dynamically.

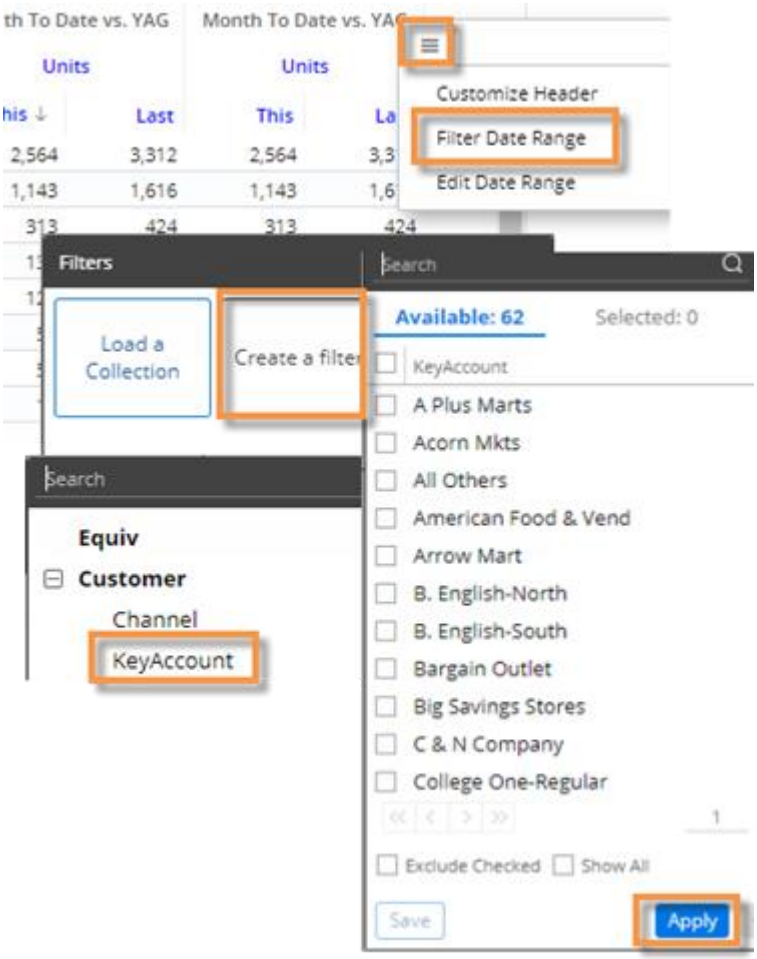


3. Leave at least one column as is to show results for whatever is selected in the filter.

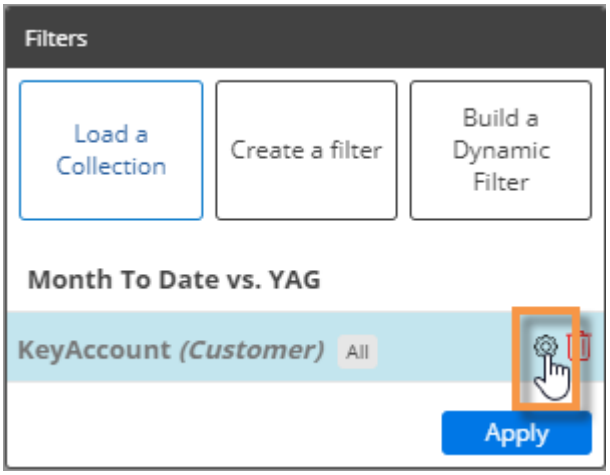
To compare performance to a benchmark

4. In another column, apply a filter for the same dimension or key as the workspace filter (e.g., key account)—leaving it set to All.

   - Place the cursor over the column and click the ☰ menu icon.
   - Select **Filter Date Range**.
   - Click **Create a filter**.
   - Select the dimension or key list.
   - Do not check any members. Click **Apply** once.

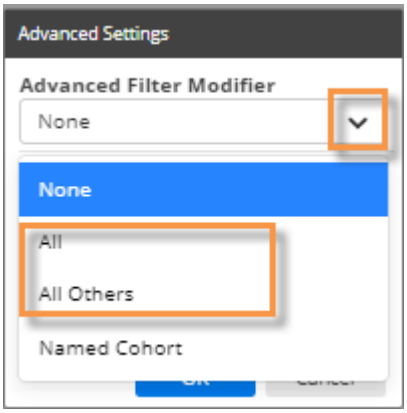


5. In the Filters area, place the cursor over the new filter and click the ⚙ button to access advanced settings.



To compare performance to a benchmark

6. Select one of the following from the Advanced Filter Modifier menu:



Option 1: Compare to All

To show data for all members including the member you are filtered on, select **All**.

Option 2: Compare to All Others

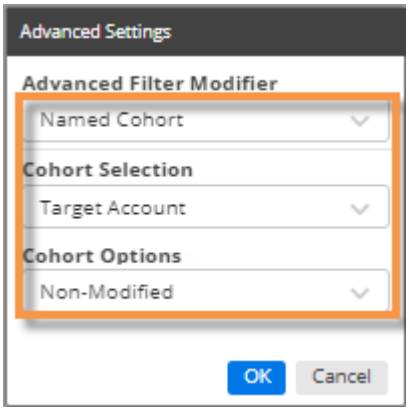
To show data for all members except the member you are filtered on, select **All Others**.

Option 3: Compare to a Cohort

To show data for a custom group of members (must be pre-defined by an administrator), make the following selections and click OK.

Select **Named Cohort**.

From the Cohort Selection menu, select the name of the cohort group. The Salient Dashboards application will search within this group to find the corresponding cohort for the filter member (e.g., target account for R D Foods) and show results for the cohort member(s).



From the Cohort Options menu, choose from the following options to add or remove the filter member from the results:

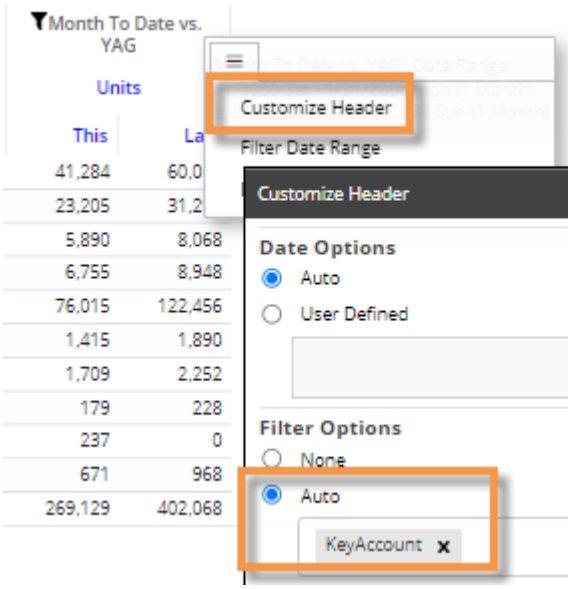
- **Non-Modified** - Leave the cohort as is; do not add or remove the filter member.
- **Include Filtered Members** - If the cohort does not include the filter member, add it to the results.
- **Exclude Filtered Members** - If the cohort includes the filter member, remove it from the results.

7. After choosing Advanced Settings, click **Apply** to apply the filter to the column.

To compare performance to a benchmark

8. *(Recommended)* Repeat the following steps for each column to modify headings so that they show what the column is filtered on:

- Place the cursor over the column and click the ☰ menu icon.
- Select **Customize Header**.
- In the **Filter Options** section, select **Auto** and then select the filter dimension to automatically show the member(s) that the column is filtered on; then click OK. Other options for custom headers are available.



Tips:

For a cohort comparison:

- If the filter member does not have a cohort within the selected group, the column will show zero data and the column header will show "Group Not Found" (if filter label is on).
- You cannot compare a cohort to multiple members at once (i.e., filter on multiple members); the column will show zeros if multiple members are on.

Depending on the dataset configuration, you may be able to include custom calculations that compare one column to another (e.g., difference between an account and a target account). This feature requires temporal measures.

See the *Salient Dashboards Installation and Configuration Manual* for information about creating and editing cohorts.

To provide automatic comparisons of user-assigned data to benchmarks (e.g., how am I doing compared to everyone else), your organization can use password collections to filter the data in a column and include another column with "all", "all others", or cohorts applied. This feature requires additional setup.

Import filters

You can import a text file (i.e., local collection) to quickly select members for a filter as explained below. This method works for several types of filters, including workspace filters, individual widget filters, and filter widgets. In addition, text files can be used when creating filter buttons and collections. This feature may be turned off globally by your administrator.

In addition to the method explained below, you can import options, including filters, from other dashboards (see page 82). However, this option is not available for filter widgets.

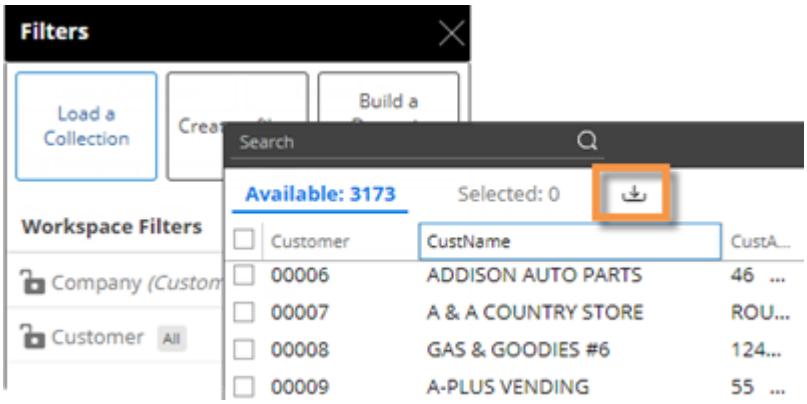
To import a text file for a filter

1. If you haven't already, create a text file that lists the members. It should have the CSV extension. Each line should list the host code of a single member.

Example CSV file

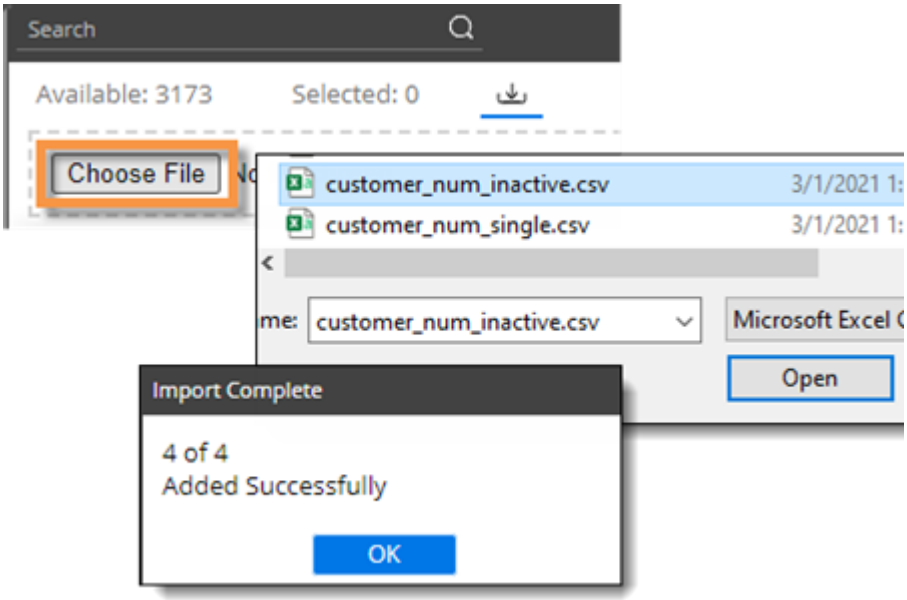
```
91857
11904
11880
00000
```

2. Go to the selection window for the filter. For example, to import a text file for a workspace filter, click on the workspace filter in the filters panel.
3. Click the button at the top of the window.



4. Choose the file and click Open.

   Salient Dashboards will show a summary of the members imported.



To import a text file for a filter

5. Click **Apply**.

Drill down (i.e., downlevel filters)

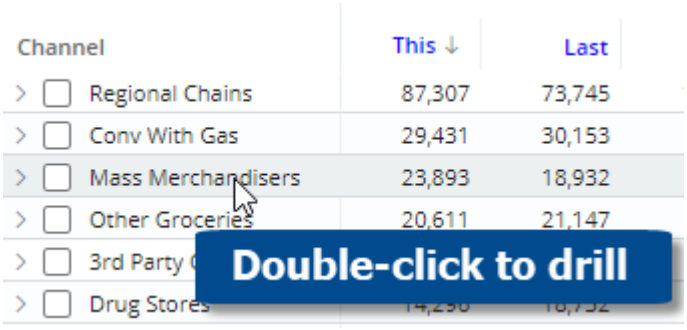
You can drill down on one or more members to filter the data in a widget. When you drill, Salient Dashboards adds a downlevel filter to remove data for all other members.

Drilling is only available in data widgets that have multiple Group By dimensions.

To drill down on a single member

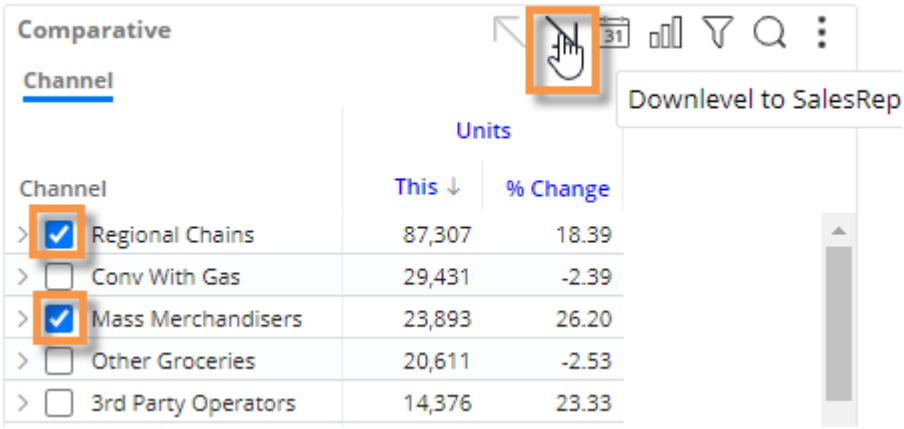
Double-click on the row, bar, pie slice, etc., representing that member.

Tip: You can also drill by clicking on a member to select it and then clicking the ↘ button at the top of the widget.



To drill down on multiple members

1. Check the desired members (see page 35) in a grid.
2. Click ↘ on the title bar at the top of the widget.
3. If a drop-down appears, select **Drill into Checked Rows**.



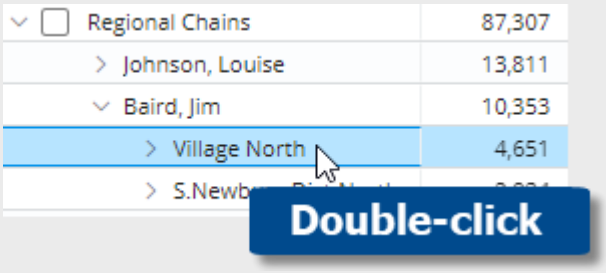
Tips:

When you drill, the By becomes what was previously the 2nd By. You may be able to change the By and/or downlevel order (see page 25) as you drill to follow a flexible drill path.

After you have drilled down, you can drill back up at any time by clicking ↖ on the widget toolbar.

Tips:

You can drill down on expanded grid rows to filter on multiple levels at once. In this case, drilling back up will remove all the drill levels simultaneously.

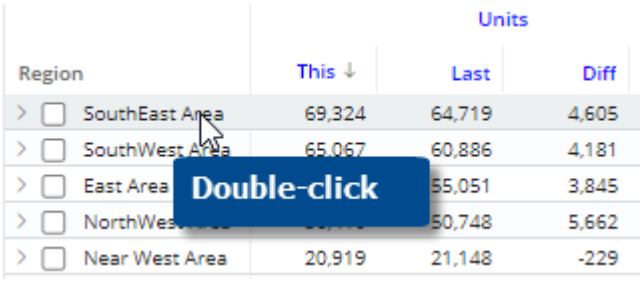


If a custom drill-down is configured, drilling down may take you to another dashboard with the downlevel filters applied.

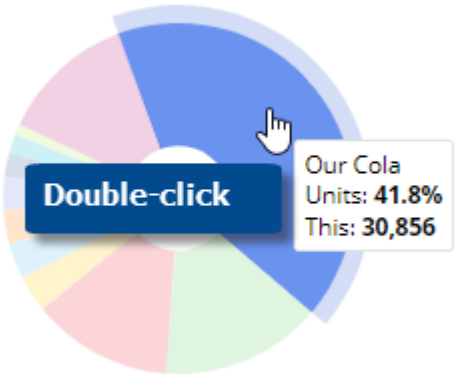
Drilling affects other widgets in the dashboard if the dashboard has a corresponding workspace filter.

Use custom drill-downs

1. Open the first dashboard (see page 8) in the custom drill-down.
2. Select the item(s) and drill by double-clicking or using other drill methods (see page 63).



3. You can continue to drill down until you reach the last dashboard in the custom drill-down.



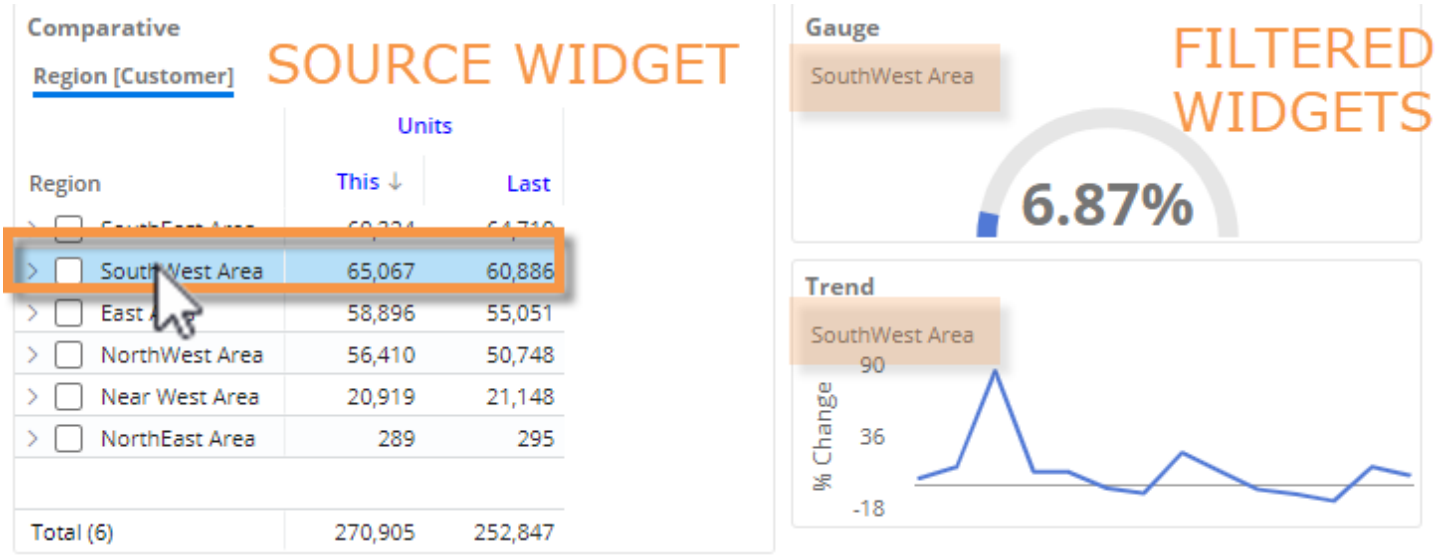
Tips:

Depending on the widget's configuration, you may need to drill through additional levels of Bys before the next dashboard will open.

You can drill on multiple member(s) by checking them and then clicking on the title bar at the top of the widget.

Widget linking

Widgets can be linked together to enable filtering via a single click on a "source" widget. A Dashboard Designer chooses one or more source widget(s) and sets up custom relationships to determine which widget(s) will be filtered.

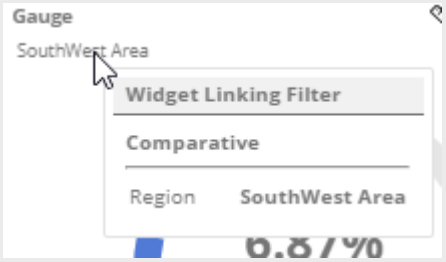


To use linked widgets

- In a source widget, click on a member to apply it as a filter in linked widgets.
  - In a grid, click on the member's row or column. The selected member will be highlighted.
  - In a graph, click on a bar, point, pie slice, or another component that represents the member. The member's label will be bold.
- To change the filter, click on a different member in the source widget.
- To clear the filter, click again on the member in the source widget.

Tip:

In a filtered widget, you can place your cursor over the breadcrumb path to see more information, including the title of the source widget.



Explore

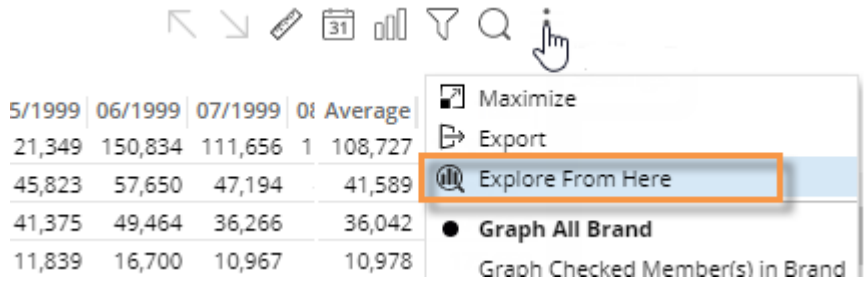
Explore mode provides additional capabilities for data investigation beyond those available in view mode. Users can change the analysis type, choose settings, and more. Explore mode does not provide the same dashboard building capabilities as edit mode.

To start exploring from a widget

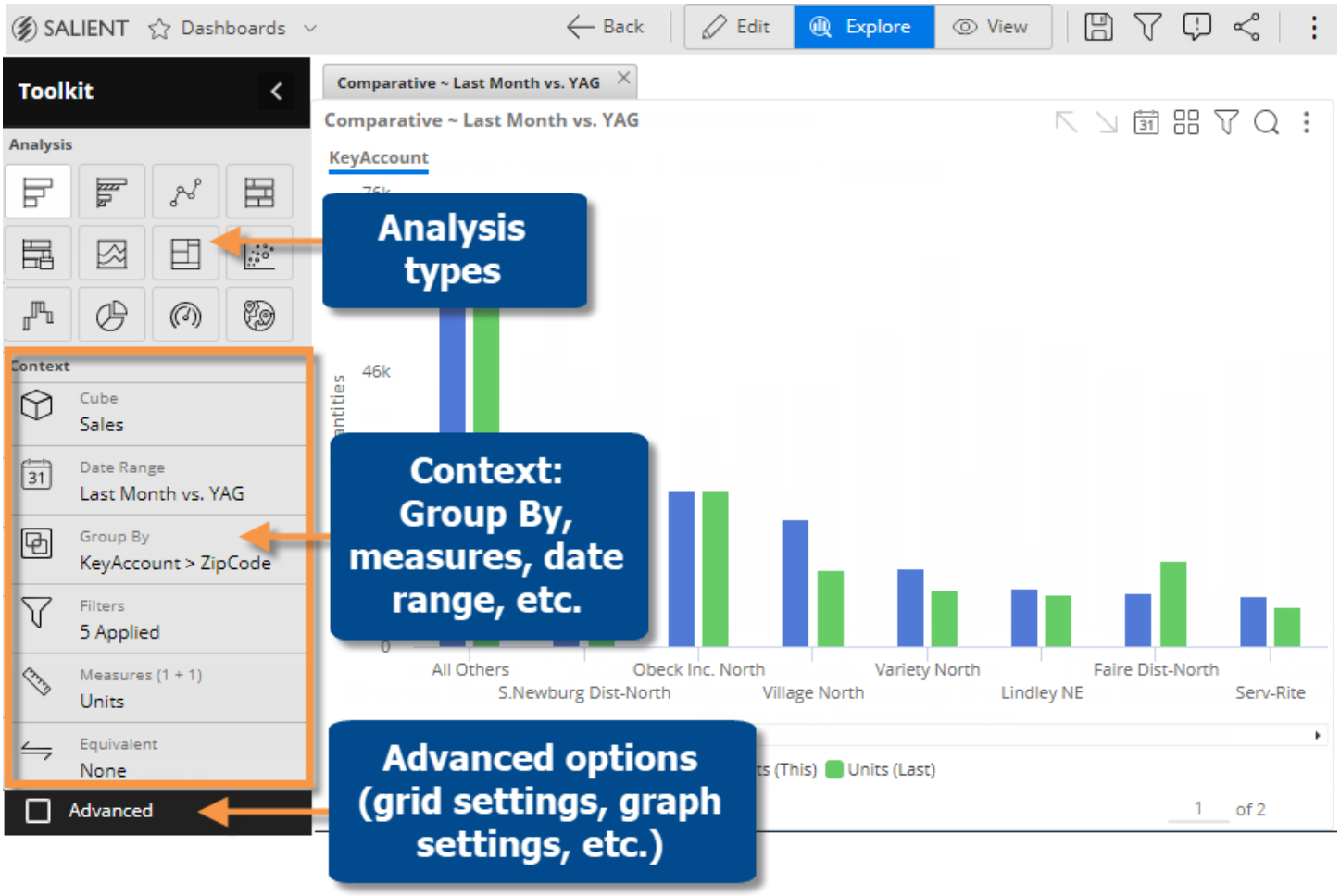
When viewing a dashboard, you can expand any of its widgets in explore mode to dig deeper into the data.

Click ⋮ in the upper-right corner of a widget (visible on mouseover) to open the menu.

Select **Explore From Here**.

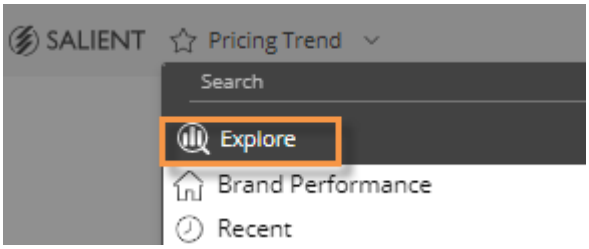


The widget is maximized within its own tab in explore mode. Additional options to investigate the data (see below) are available in the toolkit on the left side of the screen.



Go straight to explore mode

If you prefer, you can start exploring from a default view rather than picking a widget



In the dashboards screen, open the dashboards menu and select **Explore**.

The default starting point is a simple comparative, unless your organization has customized its own starting point.

What you can do in explore mode

Explore mode offers the same options for interacting with the data that are available in view mode plus the following:

- Change the analysis type, (see page 67) including analysis-specific settings such as exception criteria, a scattergran key, and geo measures.
- Highlight data (see page 68).
- Duplicate a widget (see page 71).
- Access advanced options (see page 72) (general settings, grid settings, graph settings, links, and dashboard settings).
- Access more areas of the toolkit, where you can change the date range, add measures, Group By dimensions, and more. These capabilities are also available in view mode but may be more directly accessed via the toolkit in explore mode.

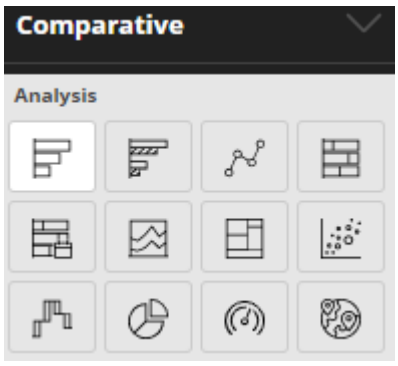
When you are finished exploring

When you are done exploring, you can:

- Use the browser's back button to go back to your previous dashboard/mode.
- Keep your changes by saving (see page 83) a new dashboard and/or exporting the dashboard to an SDM file. The resulting dashboard will open in explore mode.

Change the analysis type in explore mode

1. Select the widget.
2. At the top of the toolkit, click the button of the desired analysis type (see page 90).



Highlight data

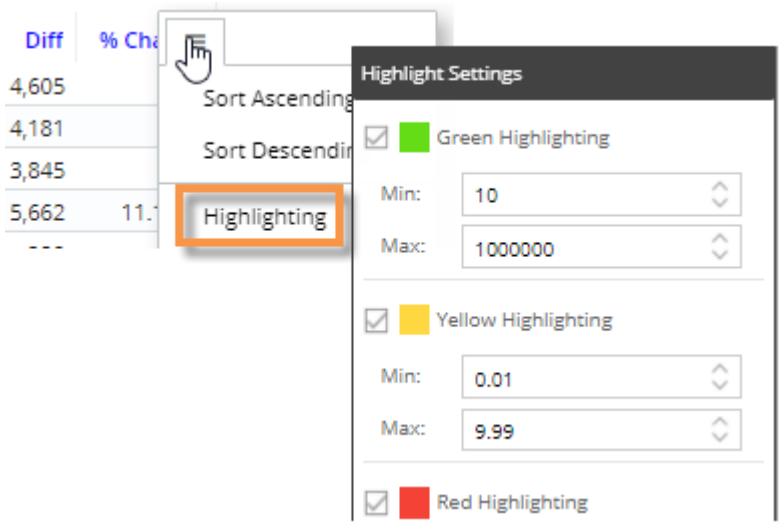
You can highlight data based on custom criteria or percent of the total (i.e., heatmap) to spot areas of concern or importance. The availability of highlighting depends on the widget type.

Grid highlighting based on custom criteria

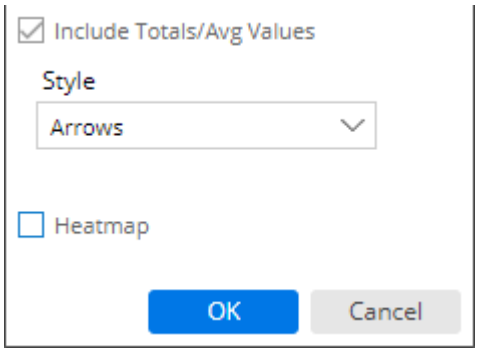
SouthEast Area	69,324	4,605	7.12
SouthWest Area	65,067	4,181	6.87
East Area	58,896	3,845	6.98
NorthWest Area	56,410	5,662	11.16
Near West Area	20,919	-229	-1.08
NorthEast Area	289	-6	-2.03

To highlight data based on custom criteria in a grid (in explore mode)

1. Place your cursor on the heading of the column to highlight. You can highlight actual values (This or Last), percent change, difference, etc., for any measure.
2. Click the menu icon ☰.
3. Select **Highlighting**.
4. In Highlight Settings, check **Green highlighting**, **Yellow highlighting**, and/or **Red highlighting**, depending on the highlighting color(s) you want to use.
5. For each color range, type a minimum value and maximum value. If you use multiple ranges, they cannot overlap.



6. Optionally, check **Include Totals/Avg Values** to apply the highlight settings to applicable totals, averages, and subtotals (i.e., checked/unchecked) in the grid.
7. From the **Style** drop-down, select a highlighting style. The style controls the symbol used in grids.
8. Click **OK**.



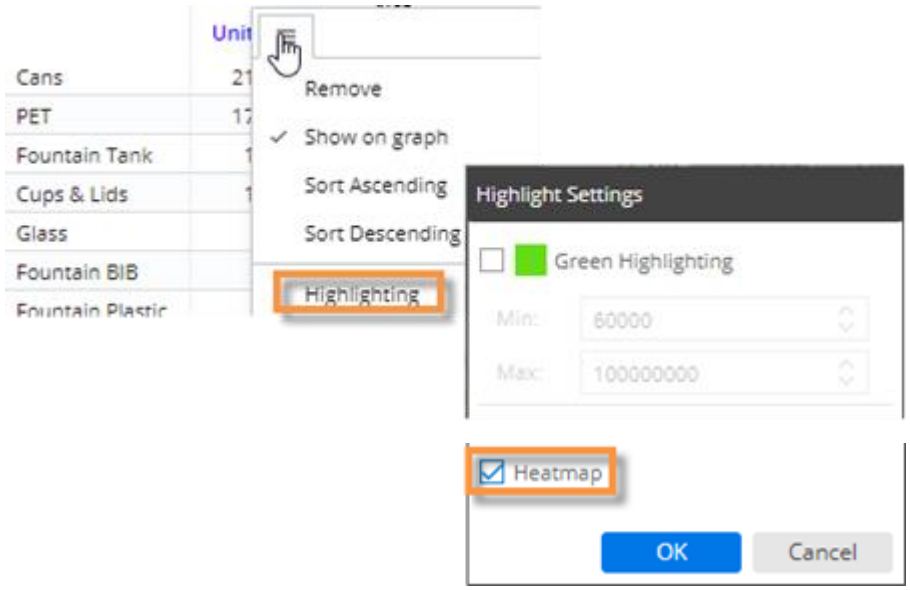
Heatmap highlighting in grids

You can highlight grid cells based on the percent of the total for a given column to create a "heatmap"; the darkest shades represent the largest values. This method does not require you to enter criteria because the shades are calculated automatically.

Form	Units ↓	Net Revenue	Margin
Cans	21,320	15,773	7,444
PET	17,360	17,516	9,229
Fountain Tank	1,192	1,718	1,009
Cups & Lids	1,152	101	-35
Glass	962	1,462	628

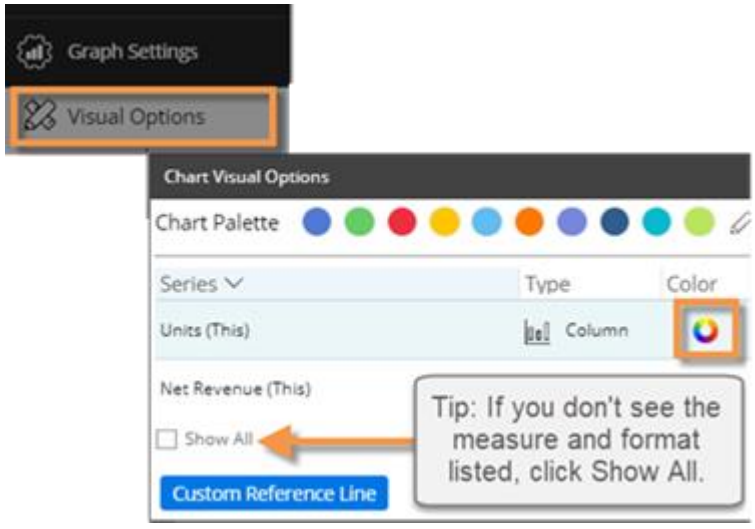
To turn on heatmap highlighting (in explore mode)

1. Place your cursor on the heading of the column to highlight.
2. Click the drop-down arrow that appears.
3. Select **Highlighting**.
4. In **Highlight Settings**, check the **Heatmap** box.
5. Click **OK**.

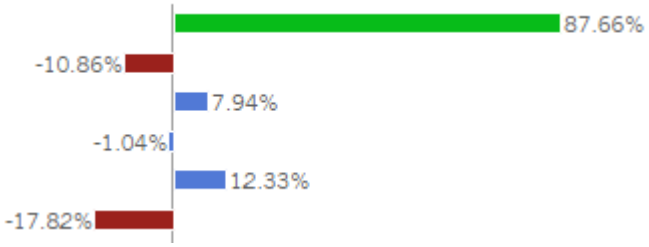


6. Optionally, choose a custom color in Graph Settings, Visual Options. Locate the specific measure and format (e.g., Units for This date range) and then click in the Color column. This color will serve as the darkest shade possible, with other shades calculated accordingly.

   If you skip this step, then the grid will use the color of the data type (i.e., blue for volume, black for revenue, etc.)



Graph highlighting

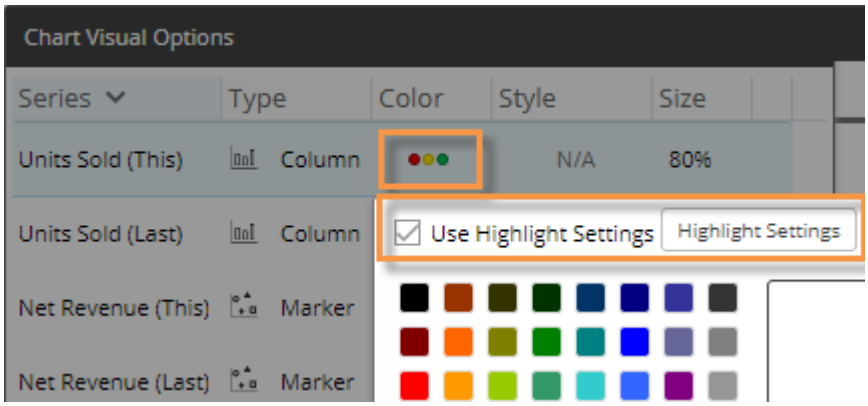


To highlight data in graphs

1. Access visual options by clicking in the graph legend (available on mouseover if the legend is enabled).

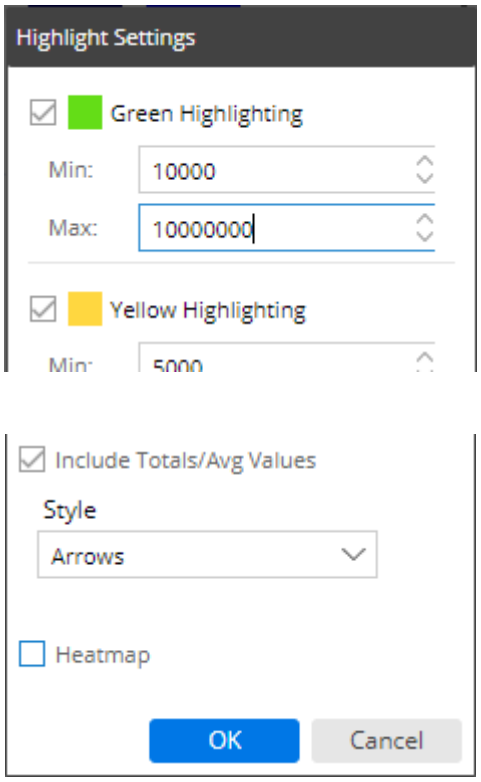
Tip: You can also access visual options under Graph Settings in the toolkit (in explore mode).

2. For the measure/format to highlight, click in the Color column.
3. Check the **Use Highlight Settings** box.
4. If highlight settings are not already configured, click the **Highlight Settings** button and set highlighting ranges as explained below.



To highlight data in graphs

- For each color you wish to use, check the box and type a minimum value and maximum value. Ranges cannot overlap.
- Optionally, check **Include Totals/Avg Values** to apply the highlight settings to applicable totals in the graph. This setting only affects graphs that compare members and include the graph total, which can be turned on in graph settings.
- Select a style. In graphs, the style controls custom highlighting colors if they are configured.
- When you are finished, click OK.



Duplicate a widget

When you duplicate a widget in explore mode (see page 66), the new widget will be maximized in its own tab, allowing you to follow another path of investigation within the dashboard.

To duplicate a widget

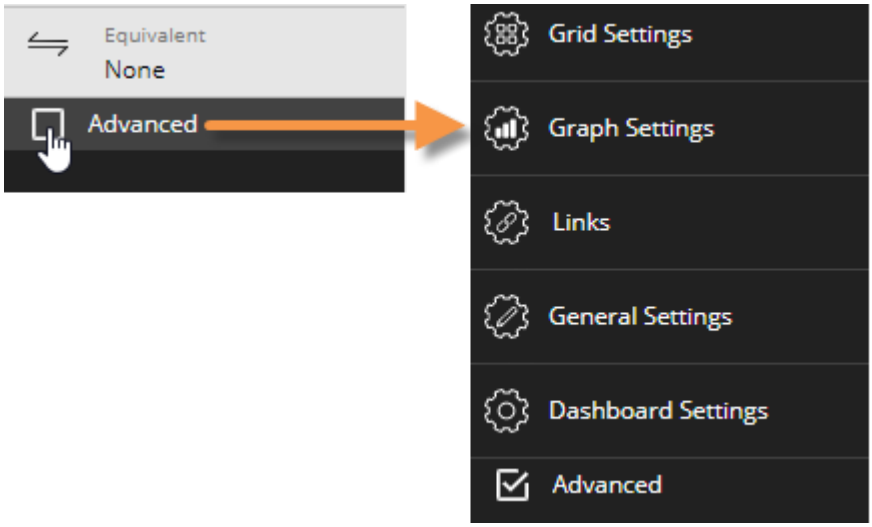
1. In explore mode, select the widget/tab you want to duplicate.
2. On the widget title bar, click the ⋮ menu button and select Duplicate Widget, or press **+** on the keyboard.
3. Make changes to the new widget as desired.

Advanced options for exploring

In explore mode, advanced options are hidden by default to simplify the screen.

To turn on advanced options for exploring

At the bottom of the toolkit, check the Advanced box.

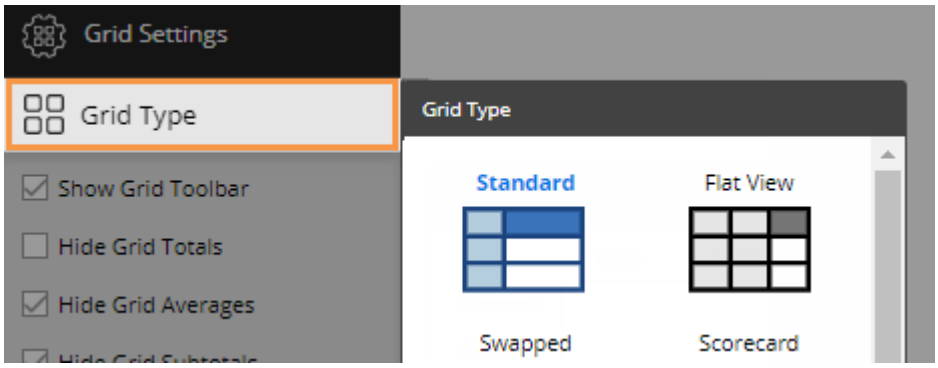


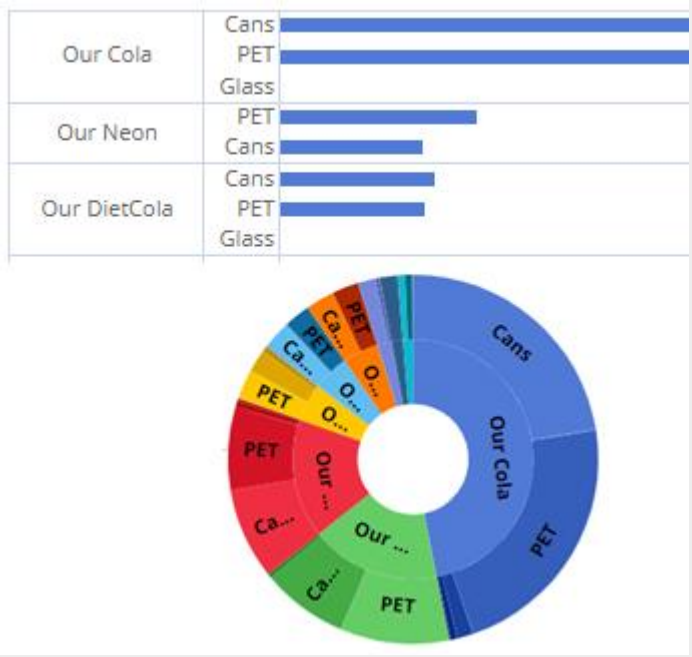
The following settings become available.

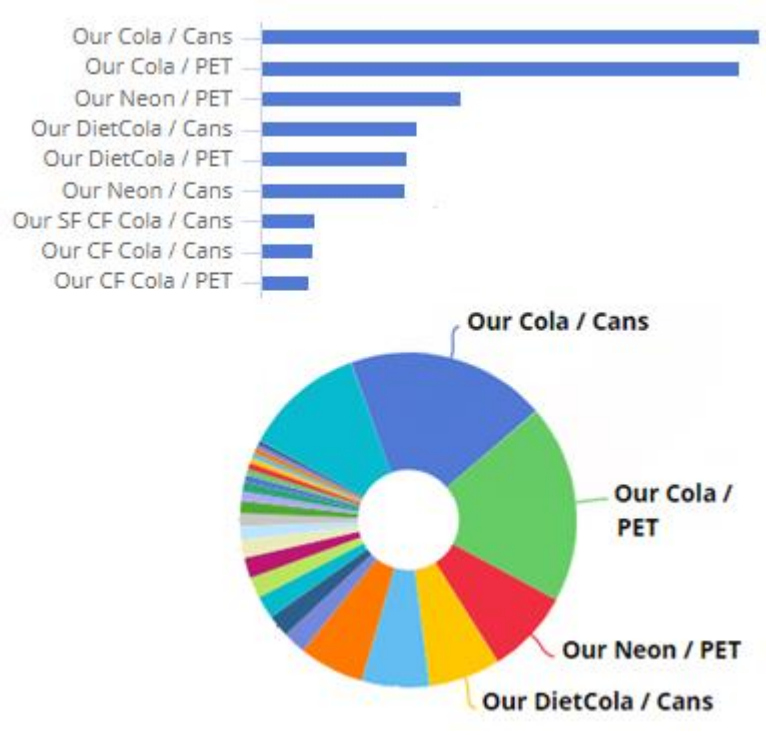
Area	Settings
Grid Settings	Grid page size, infinite scrolling, show/hide totals, grid types (see page 73), etc.
Graph Settings	Graph page size; orientation; show/hide legend, axis, labels; visual options (see page 76), trellis, etc.
Links	Navigation links to other dashboards and links between widgets (see page 65) for interactive filtering
General Settings	Widget title, transparency, show/hide nulls, date display settings (see page 75), etc.
Dashboard Settings	Member coloring (see page 79), host code display settings, Knowledge Manager settings, metric coloring in grids, etc.

Grid types in explore mode

The grid type affects the layout of columns and rows. In addition, some grid types affect the format of graphs when auto-expand is on (see page 31). To change the grid type, go to Grid Settings in the toolkit and click on Grid Type. In explore mode, you may need to check Advanced at the bottom of the toolkit to see these settings. The available types depend on the selected widget.



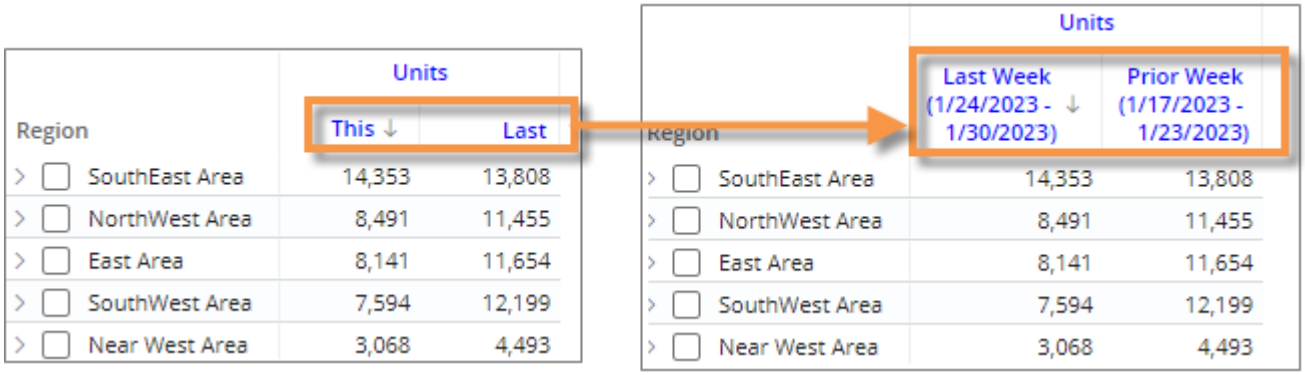
Grid type	Example	Explanation
Standard	Units Region / This ↓ / Last / % Change SouthEast Area 73,794 116,284 -36.54 SouthWest Area 60,364 89,170 -32.30 NorthWest Area 57,685 83,206 -30.67 East Area 57,196 85,956 -33.46 Carbonated 54,648 82,242 -33.55 Non-Carb 1,956 2,966 -34.05	In general, a standard grid shows measures in columns and members in rows. Expanded dimensions will be in a "tree."
		In graphs with auto-expanded dimensions (see page 31), the standard grid type will cause members to be grouped under the parent category.

Grid type	Example	Explanation
Flat view	Units Region / Type / This ↓ / Last / % Change SouthEast Area / Carbonated / 67,439 / 106,188 / -36.49 SouthWest Area / Carbonated / 57,028 / 84,426 / -32.45 NorthWest Area / Carbonated / 54,707 / 79,084 / -30.82 East Area / Carbonated / 54,648 / 82,242 / -33.55 Near West Area / Carbonated / 16,829 / 24,866 / -32.32 SouthEast Area / Non-Carb / 5,067 / 8,340 / -39.24	The flat view grid (see page 30) is like the standard format except it places expanded dimensions in separate columns so rows can be treated independently.
		In graphs with auto-expanded dimensions (see page 31), the flat view displays combinations of members in a single level. The combinations can be sorted independently.
Swapped	Region / SouthEast Area / SouthWest Area Units Sold — This: 1,145,423 / 968,805 Last: 1,012,078 / 907,021 Diff: 133,345 / 61,784 % Change: 13.18 / 6.81	In a swapped grid, columns and rows are switched.
Scorecard	This / Last / Diff / % Change Units Sold: 4,257,862 / 3,915,236 / 342,626 / 8.75 Net Revenue: 38,565,105 / 35,313,796 / 3,251,310 / 9.21	The scorecard grid shows measures in rows and timeframes (This, Last, difference, etc.) in columns; does not compare members.

Grid type	Example	Explanation
Scorecard swapped		The swapped scorecard shows measures in columns and timeframes (This, Last, difference, etc.) in rows; does not compare members.

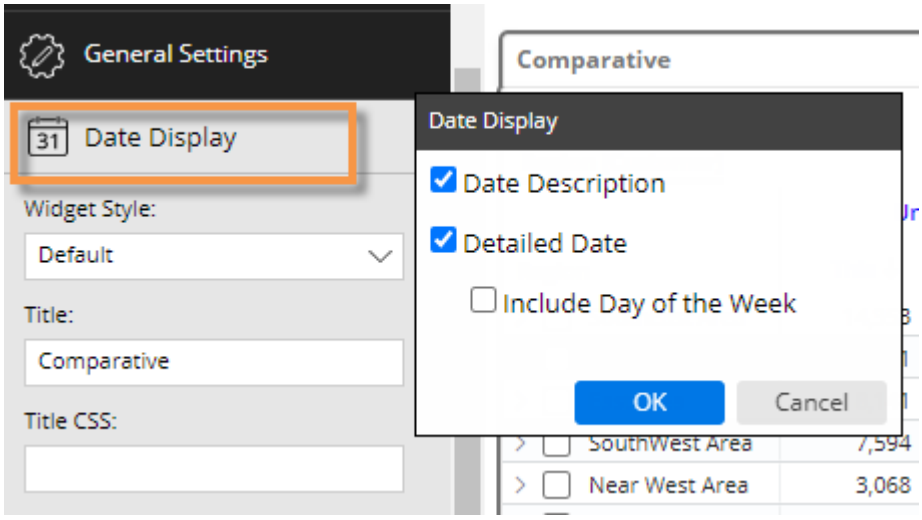
Date display settings

You can customize the column headers in Comparative and Multi Comparative grids to show information about the dates being reported rather than the default "This" and "Last" labels. The headers can include descriptions based on the date settings and/or the beginning and ending dates of the date ranges.



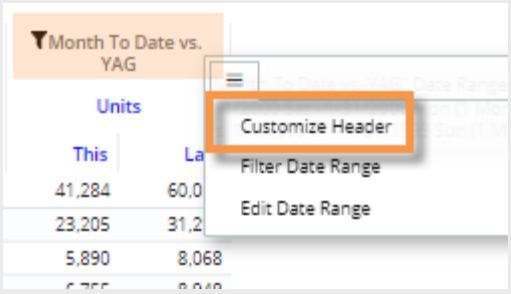
To choose date display settings

1. Select a Comparative or Multi Comparative widget.
2. In the toolkit (in explore mode), expand **General Settings**, and click on **Date Display**.
3. Check the following boxes to show information about the date range.



- Date Description - Show a date range description, which is based on the resolution, number of dates, and customizations such as offsets or most recent complete settings. Examples include Month To Date, Last 6 Months, Year To Date, Last 4 Weeks, YAG, Prior Month, etc.
- Detailed Date - Show the start and end dates of the date range (e.g., 10/1/2023-10/20/2023).
- Include Day of the Week - Include the day of the week in the detailed date (e.g., 10/1/2023 Sun – 10/20/2023 Fri).

Tip: In Multi Comparative widgets, you can also customize the top-level column header.



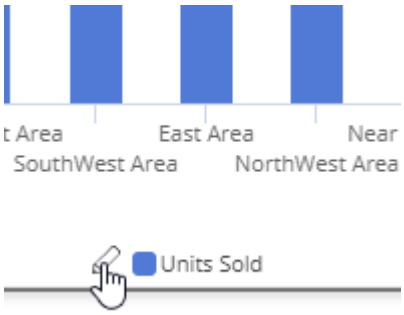
Visual options

Using visual options, you can customize the colors and styles used in most graphs.

To access visual options

In view mode:

Click ✎ in the graph legend (visible on mouseover if the legend is enabled).

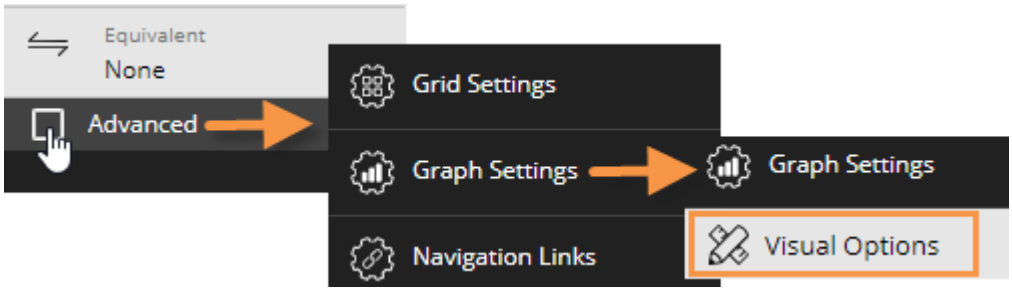


In explore mode:

Checkmark Advanced at the bottom of the toolkit.

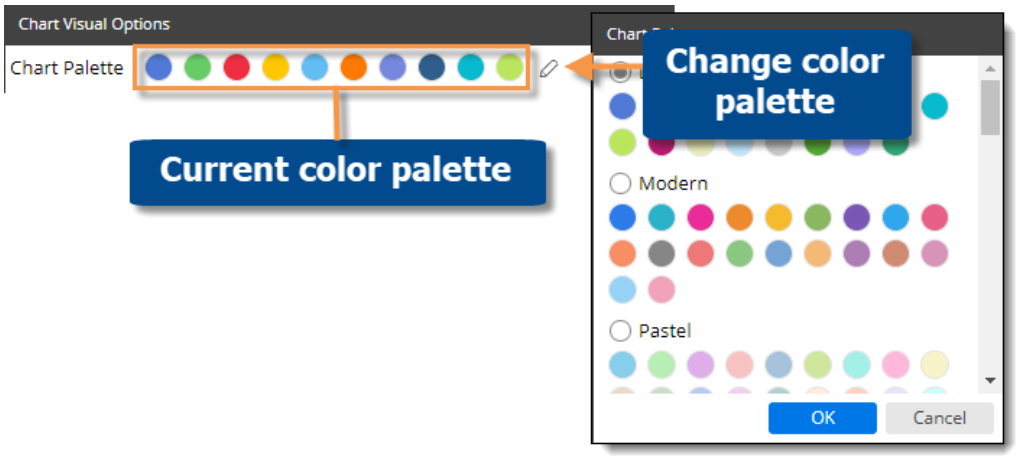
Expand Graph Settings.

Click on Visual Options.



Choose a color palette

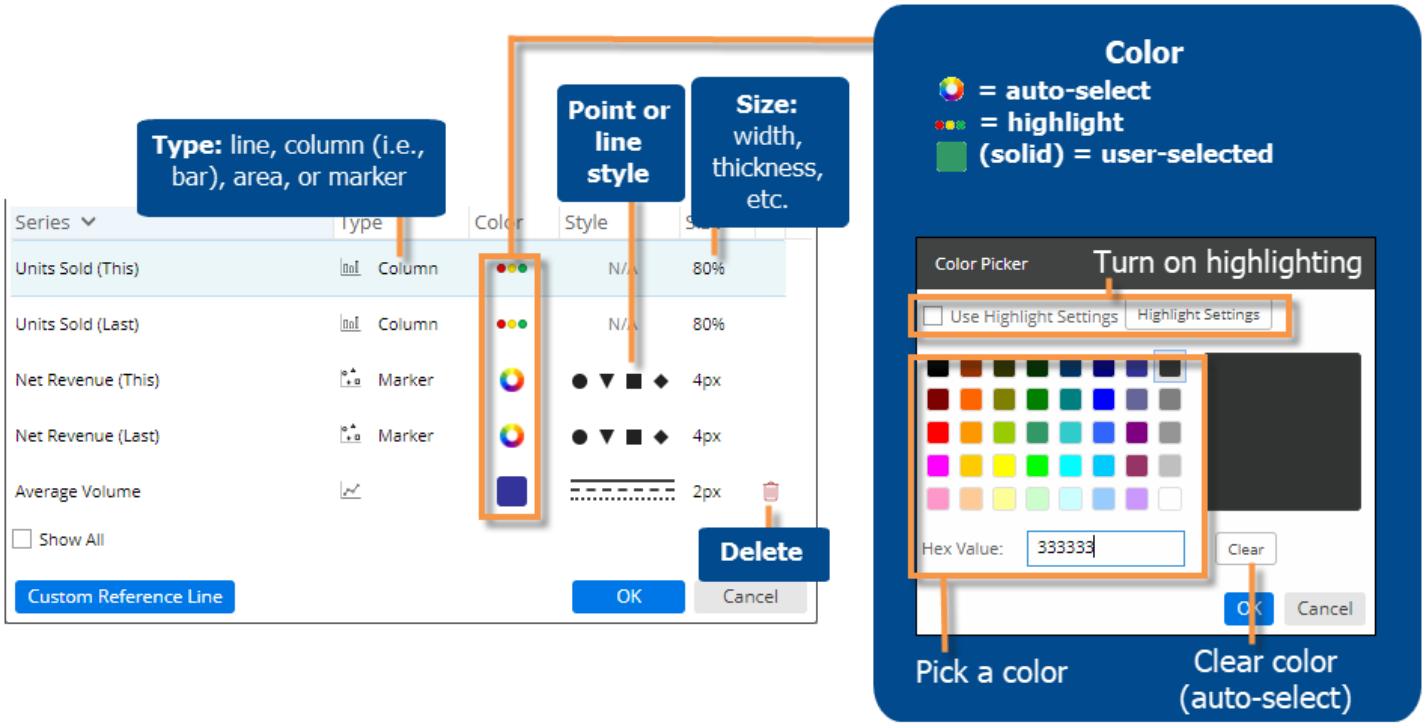
At the top of visual options, click to change the color palette, which controls the default colors of most graph components. Salient Dashboards will apply the selected palette's colors in the order they are shown (e.g., blue to first component, green to second component, etc.). The available palettes depend on the dataset configuration.



Tip: You can override the selected palette by choosing a color for an individual graph component as explained below.

Customize graph components

Depending on the graph type, you can customize individual graph components (e.g., bars, lines, points, etc.). In visual options, click in the row of the component to make the following changes:



Tip: If you don't see the measure/format, checkmark the **Show All** box.

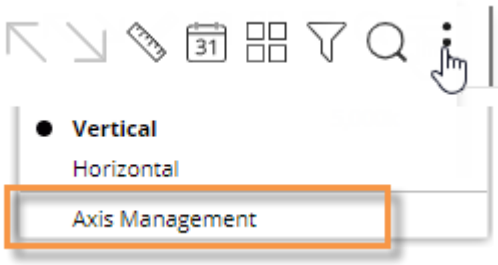
Axis management

You can customize the axes of several graph types, including Trend, Comparative, and Multi Comparative.

To customize axes

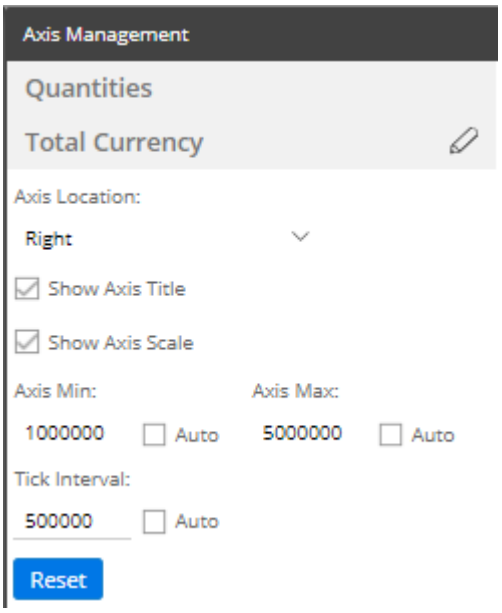
Before proceeding, add the desired measures.

1. Click ⋮ in the upper-right corner of the widget, and select Axis Management.



2. For an actual value graph, choose the axis to customize (e.g., Quantities, Total Currency, etc.). Depending on the selected measures, the graph may include multiple axes, each of which represents a measure or data family.

   For a percent change graph, all % change data will be plotted along a single axis so this step is not necessary.
3. To change the axis title, click ✎.
4. Choose the axis location.
5. Show or hide the axis title.
6. Show or hide the axis scale.
7. Choose scale settings, including the minimum, maximum, and tick interval. These may be automatic or custom values.
8. Click Save when you are finished.

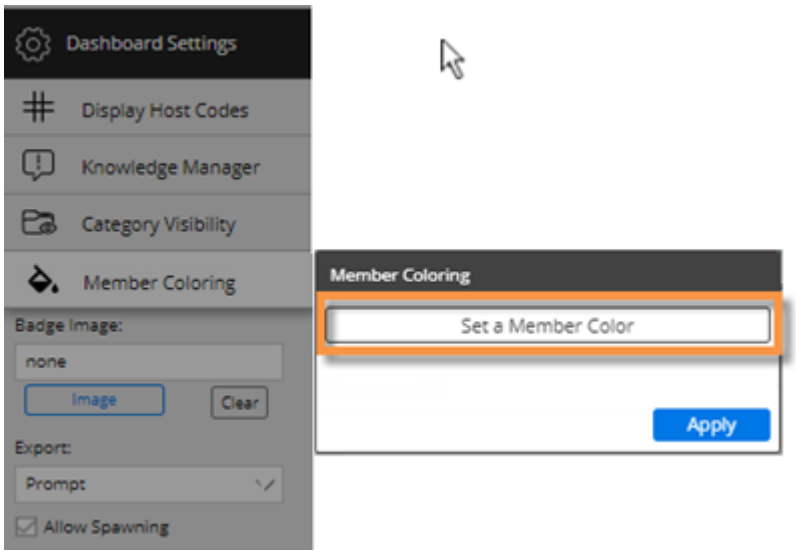


Member coloring

You can assign custom colors to specific dimension members to enhance visual understanding in some types of graphs. For example, you might assign blue to represent a certain region. The colors will be applied consistently in all applicable widgets, which include Mix, Share Trend, and some Crosstab graphs (see the following tips), within the dashboard. For members with assigned colors, the member coloring will override the color palette (see page 76). Member colors do not carry over from one dashboard to another; however, you can import settings for member coloring (see page 82).

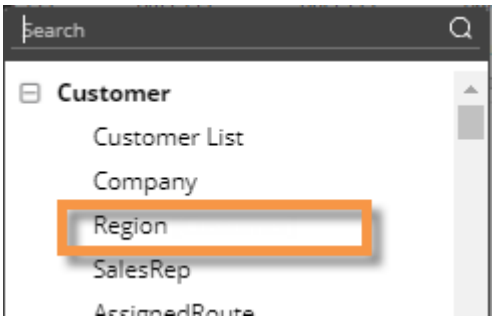
To apply member coloring

1. In explore mode, click on Advanced at the bottom of the toolkit.
2. In the toolkit, expand **Dashboard Settings**, and click on **Member Coloring**.
3. Click on **Set a Member Color**.



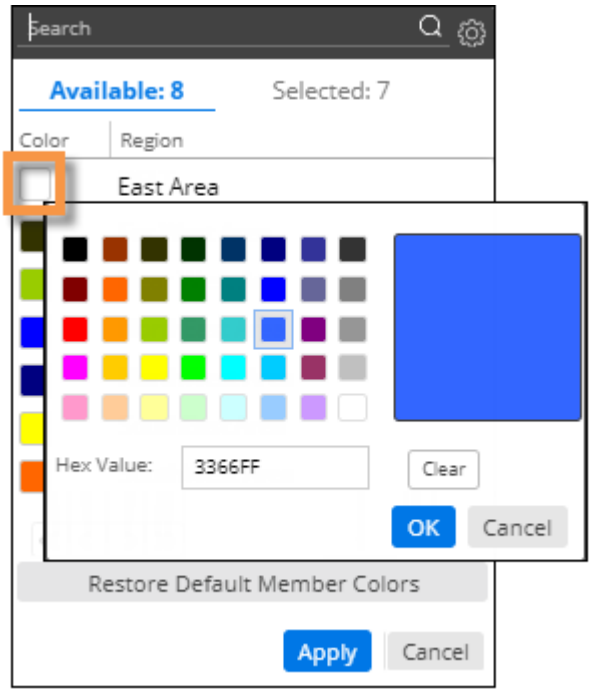
Tip: This menu shows a summary of the member colors that have already been defined. You can click on a dimension to edit its colors.

4. In the next menu, choose the dimension.

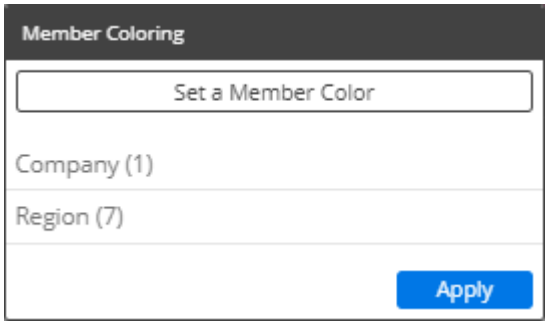


To apply member coloring

5. Locate a member to which you want to assign a color. If you wish, you can search for a member.
6. Click the square beside the member and choose a color. Repeat this step to choose colors for additional members. You may skip a member(s); in this case, the default color from the palette will be applied to the member(s).
7. When you are finished choosing colors for a dimension, click **Apply**.



8. Click **Apply**, or repeat this procedure to choose coloring for additional dimensions.

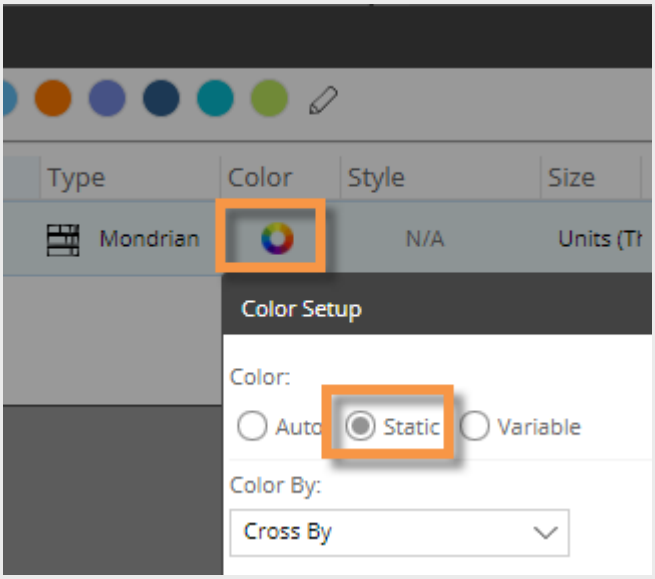


Tips:

Only Mix, Share Trend, and Crosstab graphs with static colors show member coloring, because other types of widgets use coloring to represent measures, percent change, pass/fail, etc.

To turn on static colors for a Crosstab so that member coloring can be utilized, go to its color setup in **Visual Options**.

Crosstab static coloring (in visual options):

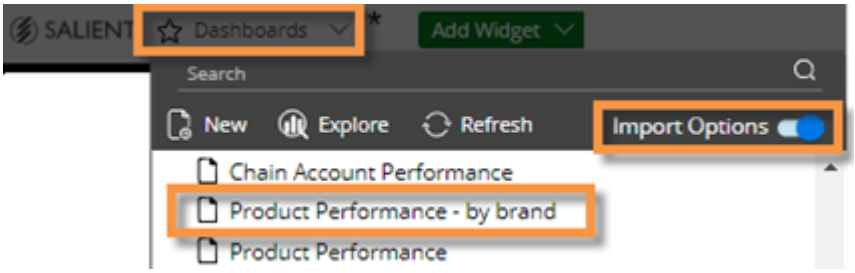


Import dashboard options

You can import settings from other dashboards. For example, you might want to import filters, member coloring, and other dashboard settings.

To import dashboard options

1. Open the dashboard to which you want to apply the settings.
2. Go to the dashboards menu at the top of the screen.
3. Turn on **Import Options**.
4. Click on the name of the dashboard that has the settings you want to import.



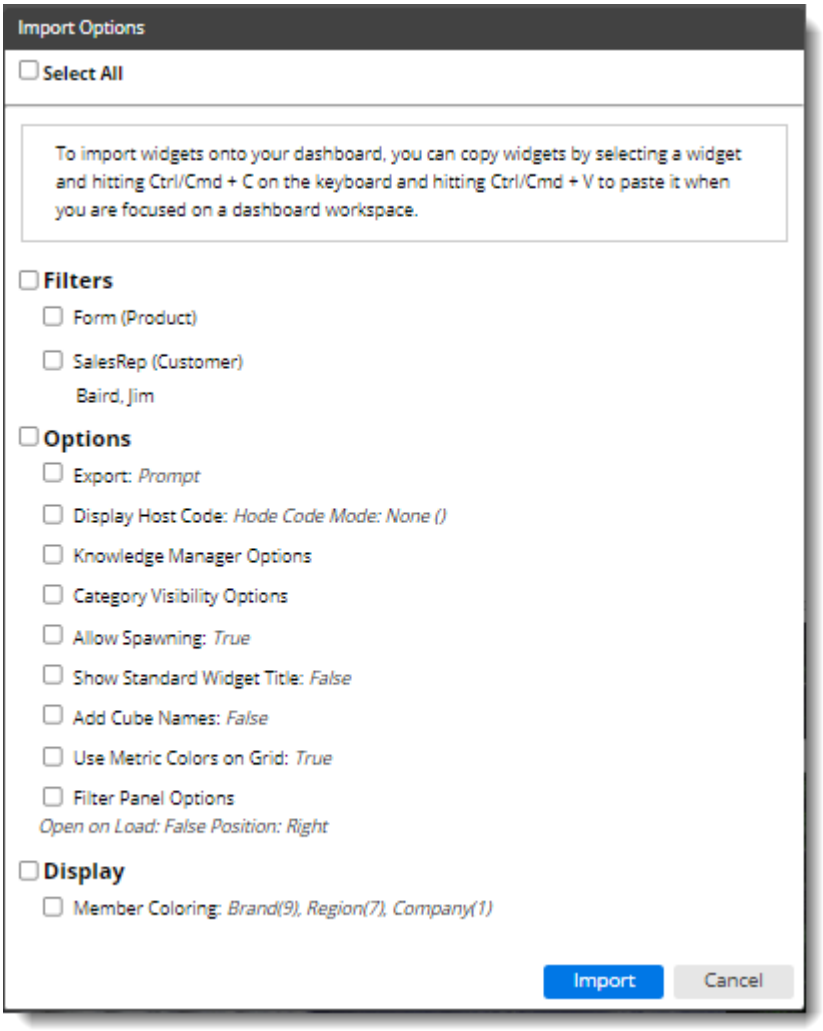
5. In the Import Options dialog, check the settings you wish to import, or check Select All to quickly import all available settings.

   Filters - includes filters that have been applied to the workspace. (Workspace filters associated with filter widgets are not available for import.)

   Options - include various dashboard settings.

   Display - includes settings for custom coloring of members (see page 79) and may also include a background image and badge image (if used).

6. Click **Import**.



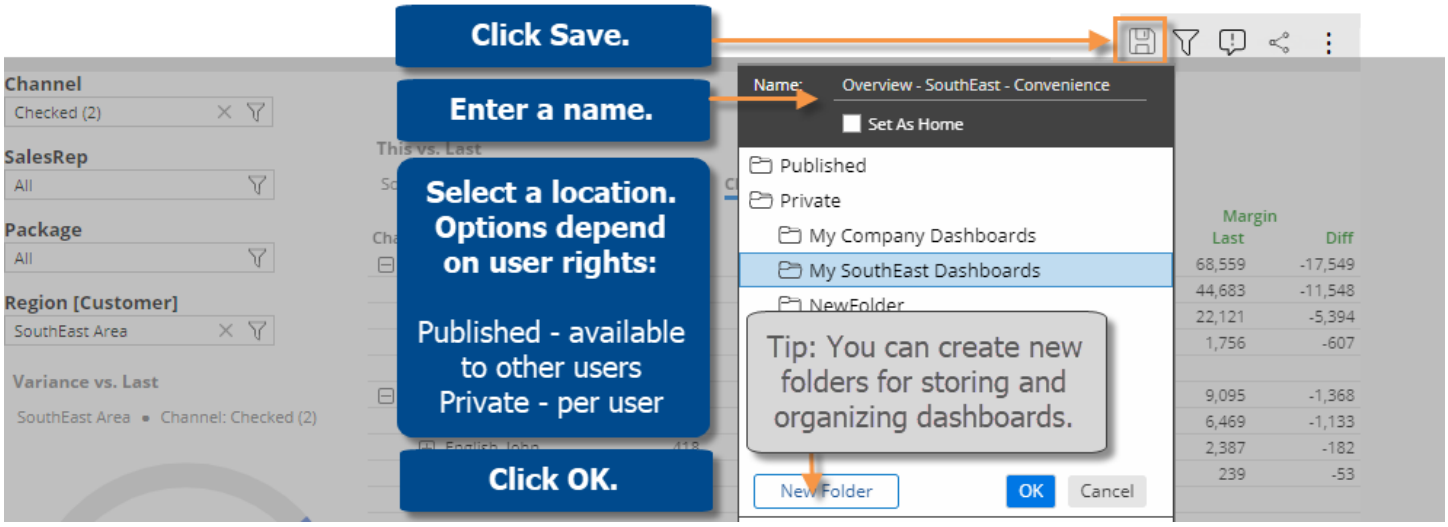
Save & share

Save a dashboard

After you have made changes to a dashboard, you may want to save it so that you can return to it in the future with your desired settings already applied and/or share it with others (additional rights may be required).

To save a dashboard

1. Open the original dashboard and make the desired changes. For example, you might apply a filter or change the date.
2. Click **Save** at the top of the screen.
3. Type a dashboard name. This might be the same as the original dashboard or you might modify the name.
4. Select a location. The available locations depend on your user rights: private dashboards are only available to you; published dashboards are available to other users.
5. Click **OK**.



Tips:

The saved dashboard is a copy of the original dashboard unless you overwrite it using the same location and name; therefore, if the original dashboard changes, the copy will not be updated.

If you only have access to the private folder and you want to share a dashboard with other users, you may want to use the Share URL feature (see page 84).

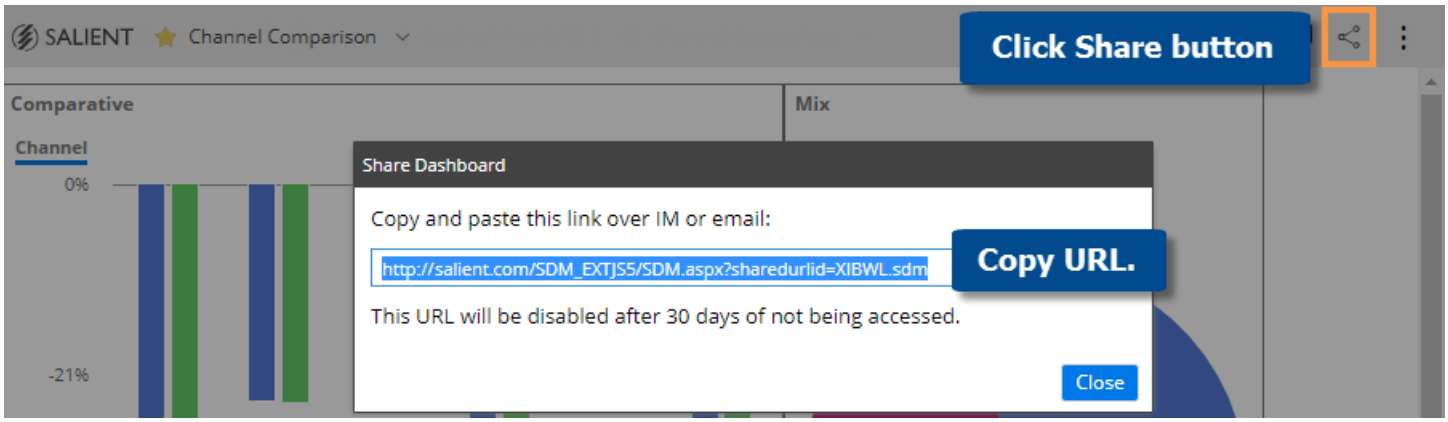
Share a dashboard

Sharing a dashboard creates a temporary dashboard URL, which you can access in future sessions and/or share with other users. A shared URL retains any changes that you made, such as filters, date range selections, etc., and is therefore, a useful method for returning to a dashboard with your preferred settings already applied.

The URL is valid for a number of days (set by your administrator) after the last time it is accessed; therefore, if users continue to access the URL, it will remain available.

To share a dashboard

1. Open the dashboard and make the desired changes. For example, you might filter or change the date.
2. Click  in the upper-right corner of the screen.
3. In the **Share Dashboard** window, copy the URL using the browser controls (for example, right-click and select Copy in most desktop browsers).
4. Share or save this URL for use by other users or in future sessions.



Export data

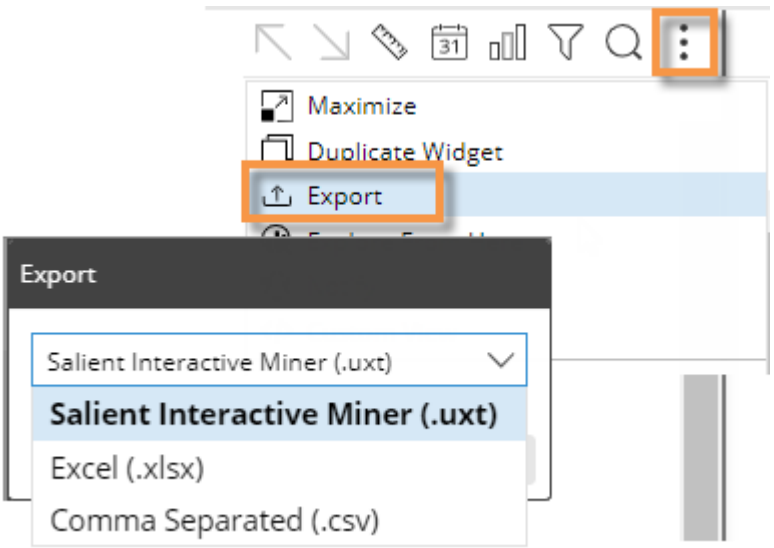
You can export the data from a widget to one of the following file types, depending on dashboard and widget settings. This option is available in a grid or graph; however, Excel and comma-separated value files will show the underlying data for an exported graph.

- UXT file (.uxt), which can be opened in SIM to go to approximately the same view as the dashboard. Because SIM and dashboards have functionality differences, the view may have minor differences.
- Excel (.xlsx) - includes the data with a header to provide information about its context, including the user, date, source dashboard and widget, modifiers, etc.
- Comma-separated value (.csv) - includes the data with a header.

Alternatively, you can create a pdf file (see page 86) containing the data.

To export data from a widget

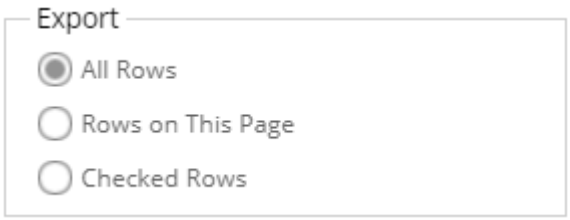
1. Customize the widget to use the desired date range, dimension, drill-path, etc.
2. On the title bar of the widget, click ⋮ and then select Export .
3. If prompted, in the **Export** dialog, select the file type to which you want to export. The file type may be pre-configured.



For Excel and comma-separated files:

4. If the widget has checked members and/or multiple pages, choose what to export: all rows, only rows in the current page of data, or only the checked rows (if rows are checked).

:



5. In the **Export Expansions** section, choose what to expand to the next level of data (only available if multiple Group Bys are configured).

   Current Grid Expansions - expands the same members as the current grid. If no members are expanded, the file will show top-level data.

   Expand and Export to - expands all members at the specified level and above regardless of what is expanded in the current grid. This option is similar to auto-expansion.

   These options are different for record details (see below).

In addition, you can include or omit subtotal rows for any expanded members. Be aware that with this option checked, the data includes duplicates and a simple totaling of a column may yield incorrect results. For example:

		Units
Region	SalesRep	This
Near West Area		20898
Near West Area	Office-Ferkel	4116
Near West Area	Office-Lasoski	3730
Near West Area	Office-Kinser	
Near West Area	Office Accounts	
Near West Area	Special Event	919

Subtotals row

Expanded rows

6. Optionally, check **Include Host Code Columns** option to include a column(s) for the host codes of the members. If members are expanded, this option will also include host codes for supgroupings.
7. Specify the file name to use.
8. Click **OK**.

Exporting record details

In general, you can choose the level of data to expand during the export process (see step 5 above). However, this capability is different for record details due to the large number of data records that are possible. Use one of the following options to export record-level data:

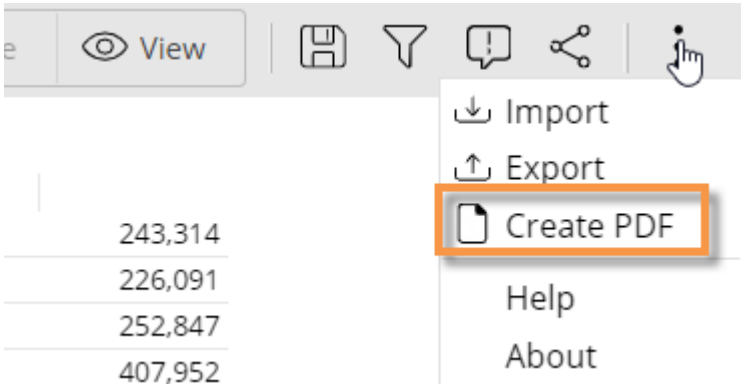
- Choose Record Details as the 1st By prior to exporting. The resulting file will show data at this level. Expansion options will not be available during the export process.
- Choose Record Details as the 2nd By prior to exporting. During the export process, you can optionally choose to expand data down to record details for all members (e.g., all accounts expanded into record details); however, be aware that the file will only include the first 1,000 records for each member of the 1st By.
- Choose Record Details as a By further down in the drill order and expand dimensions individually prior to exporting. The file will only include the first 1,000 records for any given dimension.

Create a PDF

You can create a portable document format (.pdf) file that shows the contents of a dashboard.

To create a PDF

1. Open the dashboard.
2. Click ⋮ in the upper-right corner of the screen.
3. Click **Create PDF** in the menu.
4. In the dialog, enter a file name or leave as is to use the default file name.
5. Choose from the following options:



Fit Dashboard to Single Page - This option fits the entire dashboard on one page. (The page may be a non-standard size.) If this option is cleared, the PDF file may include multiple pages.

Include Header on Each Page - This option includes headers with the dashboard name, date, and time as well as footers that show the dashboard a URL links. You can optionally add your own custom footer above the URL.

Export Individual Tabs as Separate Pages (only for dashboards that include tab group widgets) - This option shows the contents of all tabs on separate pages. If this option is cleared, the PDF file will show whatever tab is currently selected and omit the other tabs. When the option is on, you can clear the boxes of any tabs to selectively include or exclude specific tabs.

6. Click **Create**.

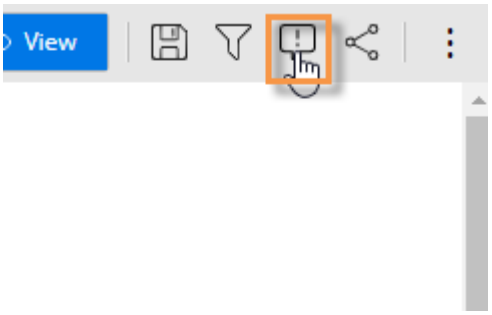
Salient Dashboards will temporarily open a new browser tab while it creates and downloads the PDF. This process will take longer the first time you use this feature.

Knowledge Manager

Knowledge Manager enables users to organize thoughts or “soft knowledge” for collaboration. You can add text descriptions, upload images or other resources, and add comments. In addition, this information can be shared between all users across multiple devices in SIM, Salient Dashboards, and the Salient Mobile app (additional setup required).

To show the Knowledge Manager panel

Click the Knowledge Manager button at the top of the screen to open the panel.



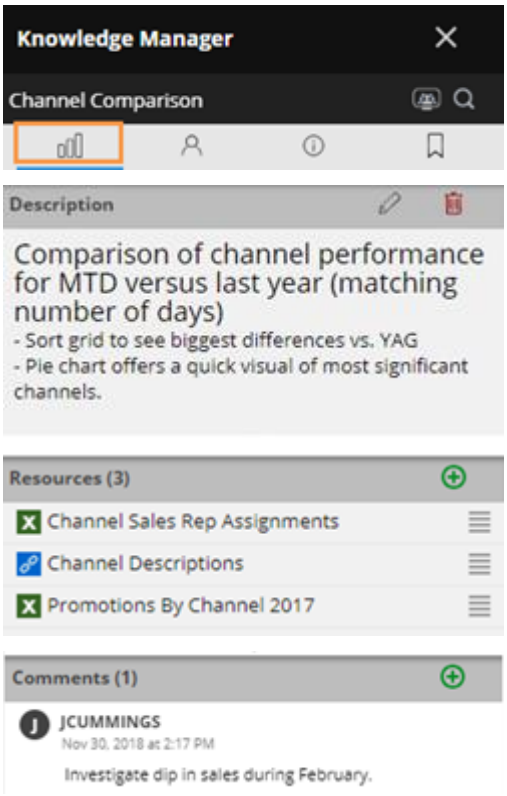
Knowledge Manager includes the following tabs.

Tip: The use of Knowledge Manager depends on your user account rights.

Dashboard Info

Allows users who create dashboards to write descriptions and purposes for them.

Resources (links to web pages, pictures or documents) and comments can be included as future reference materials become available.



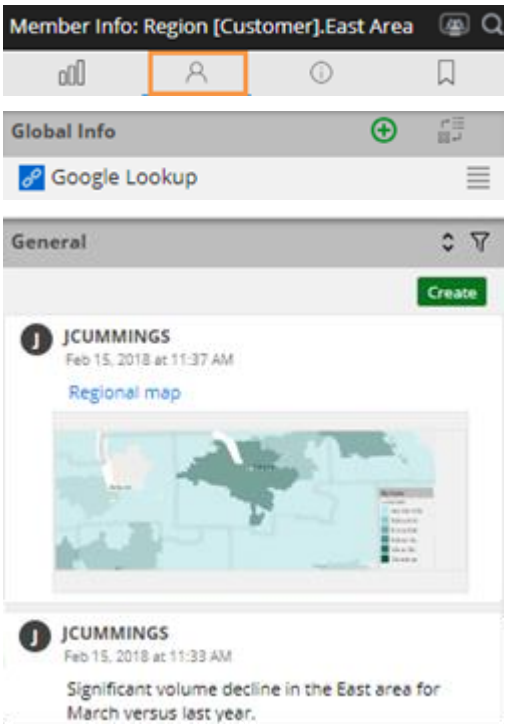
Member Info

Allows you to connect media or non-media information to specific customers, sales reps, products, dates, etc.

Entries can be filtered and sorted to keep the most current information on top.

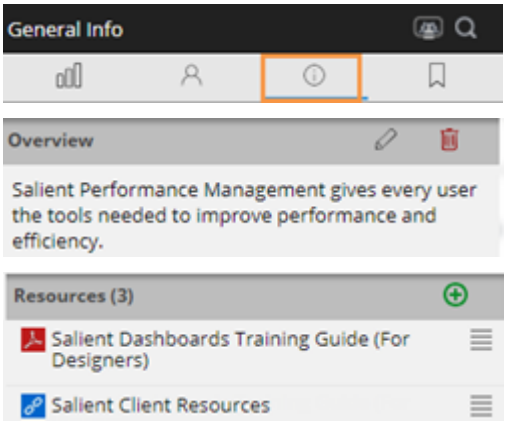
Media examples include news stories, events or related websites.

Non-media can be details on location, entry, specific contact info, or security issues.



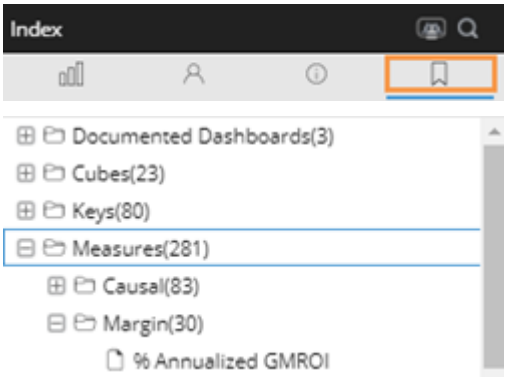
General Info

Add global information such as manuals, training material, or information about the dataset.



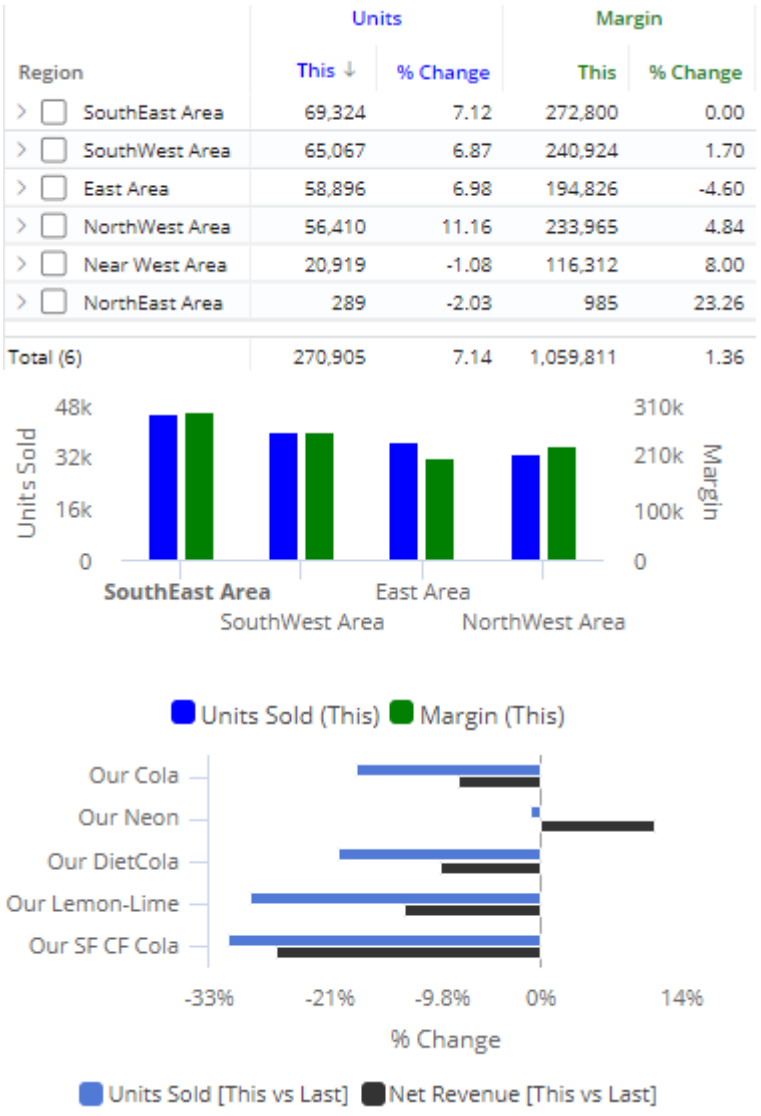
Index/Search

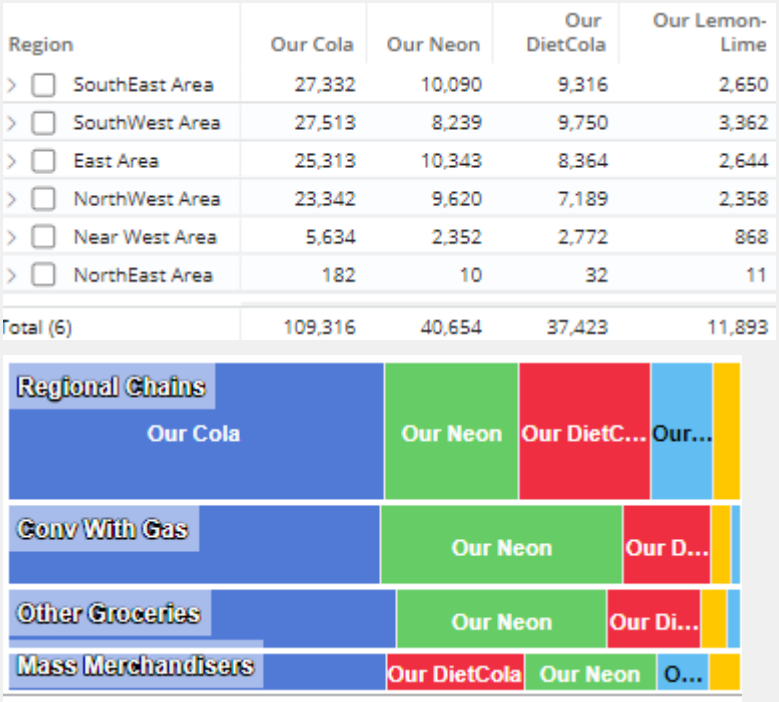
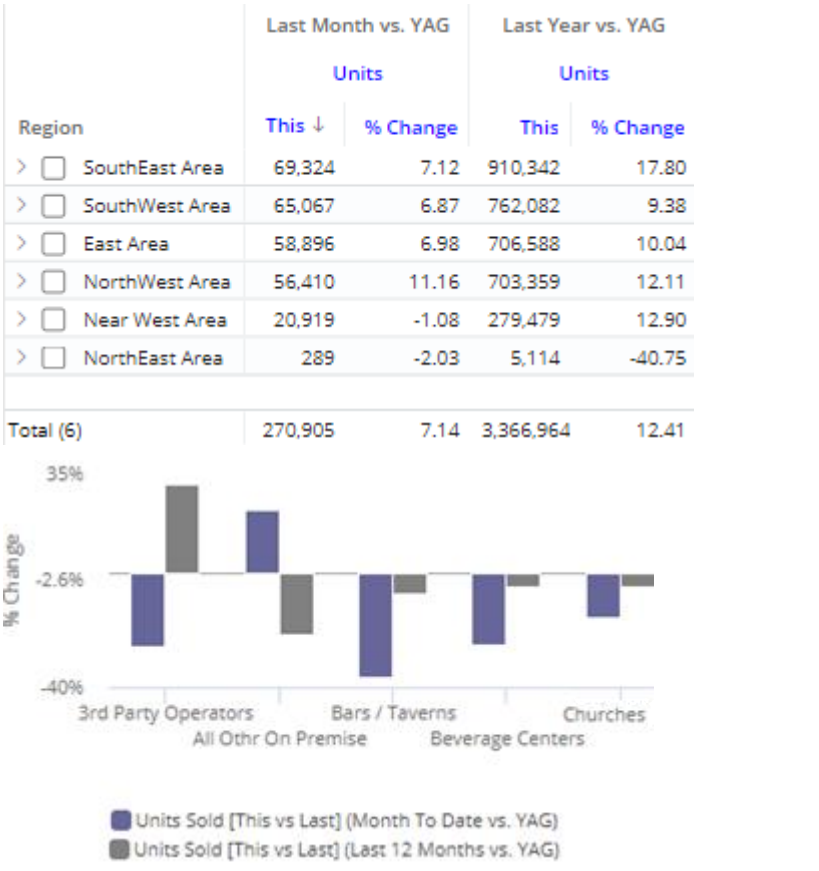
Search, view, or add information about the schema (keys, dimensions, measures, etc.).

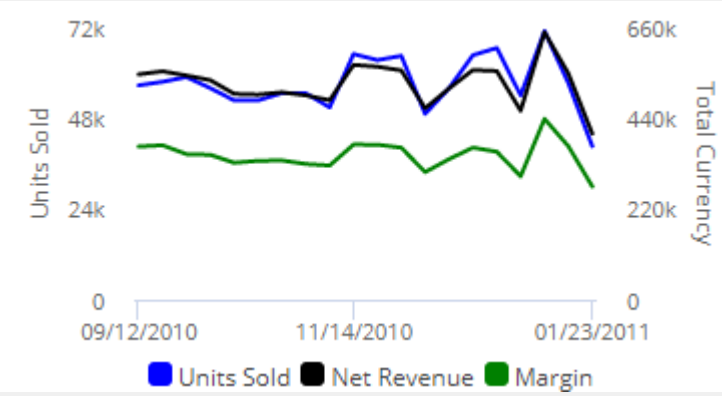
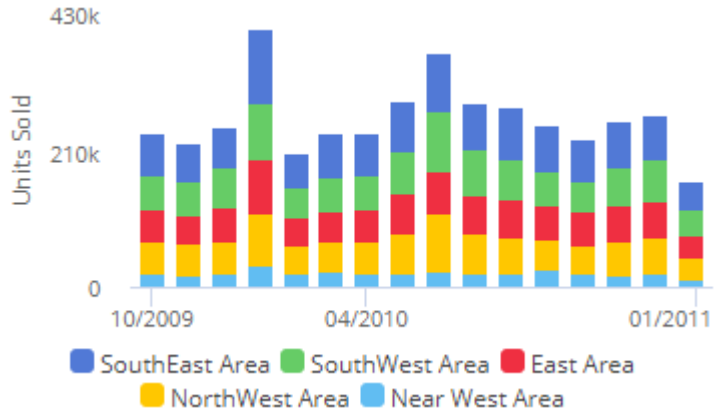


Types of data analysis widgets

A dashboard can include any of the following data analysis widgets. In explore mode, you can change the analysis type (see page 67). In any mode, you can switch between grid and graph formats (see page 13) (if enabled for the widget).

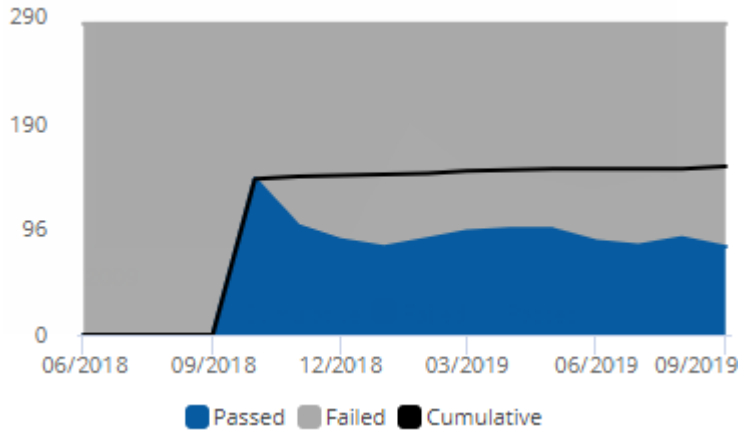
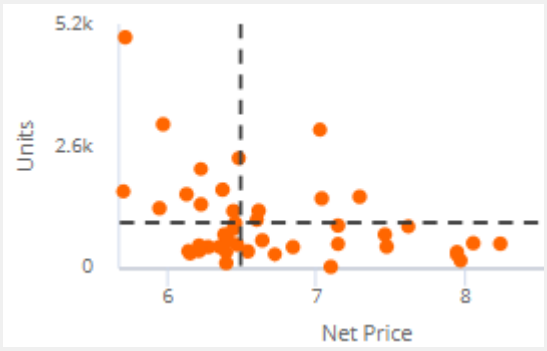
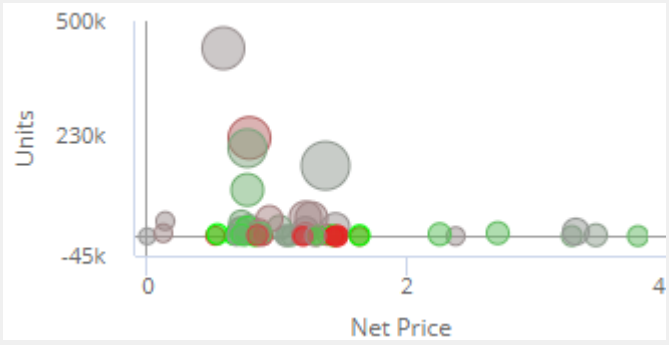
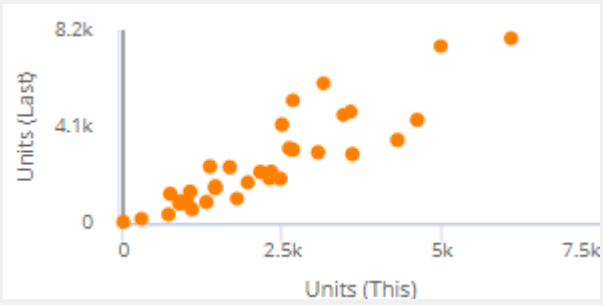
Analysis type	Examples
Comparative Comparison of members for one or two date ranges; any number measures.	

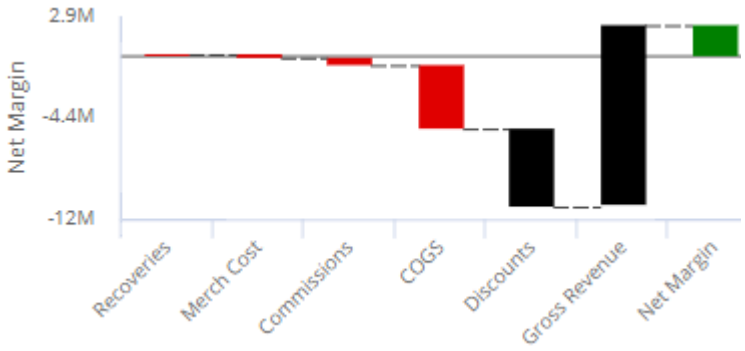
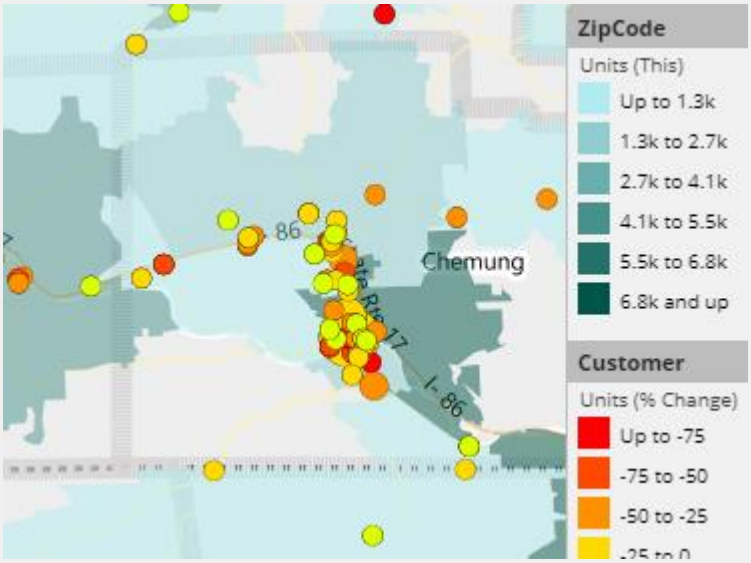
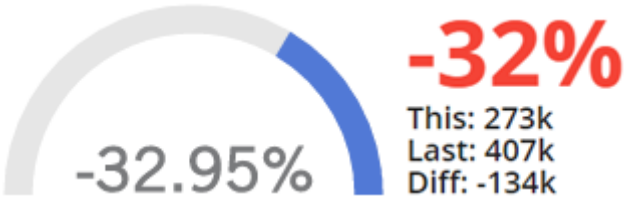
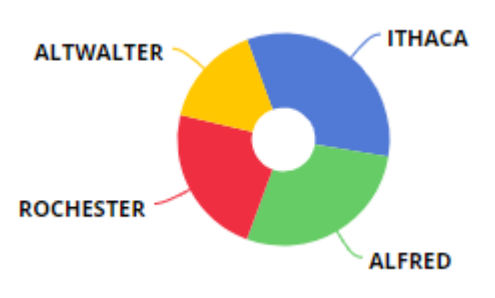
Analysis type	Examples
Crosstab Comparison grid or graph that organizes data by two different attributes (i.e., dimensions) to examine cross-sections of data.	
Multi Comparative Comparison of members for any number of date ranges and measures; column filters (see page 56) may be applied to focus on specific subsets of data and provide dynamic benchmark comparisons (see page 58).	

Analysis type	Examples
Trend Trend over time for one or two date ranges for multiple measures	
Share Trend Comparison trend for multiple members; either actual values or percent of the total for single measure	
Exception Pass and fail of key members for an exception test (e.g., customers with units >=1)	

Date	Units Sold	Avg List Price per Unit	Margin
12/12/2010	55,849	12.56	340,300
12/19/2010	64,570	12.49	368,206
12/26/2010	66,486	12.50	358,264
1/2/2011	53,978	12.48	298,829
1/9/2011	70,920	12.40	437,850
1/16/2011	57,179	12.80	371,473
1/23/2011	40,547	13.01	274,320
Total	4,290,796	12.33	24,743,785

Channel	Totals ↓	Passed	% Passed	Failed	% Failed
All Othr On Premise	1,122	184	16.4	938	83.6
Industrial	578	303	52.4	275	47.6
Schools	459	330	71.9	129	28.1
Recreation	444	215	48.4	229	51.6
Restaurants	411	245	59.6	166	40.4
Fast Food	395	266	67.3	129	32.7
Other Groceries	283	182	64.3	101	35.7
Colleges	262	230	87.8	32	12.2
Total (38)	5,863	3,166	54.0	2,697	46.0

Analysis type	Examples
Exception Time Series Pass and fail of key members for an exception test over time	
Scattergram Plot of members along two axes to show trends and outliers. The points can represent key members (e.g., customers) or dimension members (e.g., regions). Additional variables can be used to color and size the points (i.e., "bubble chart").	  

Analysis type	Examples
Waterfall How the components of a calculated measure affect its make-up	
Geo Map showing data values and/or change since another date range	
Gauge A simple visual tool showing performance; single measure	
Mix Percent of the total for multiple members for one or two date ranges; any number of measures	

Tips:

- To view record-level data similar to that in SIM's Line Item or Time in Place analysis, you can group the data by Record Details.
- Custom views may be configured to show representations of data beyond the graphs and grids shown here.