What's New in Salient Dashboards

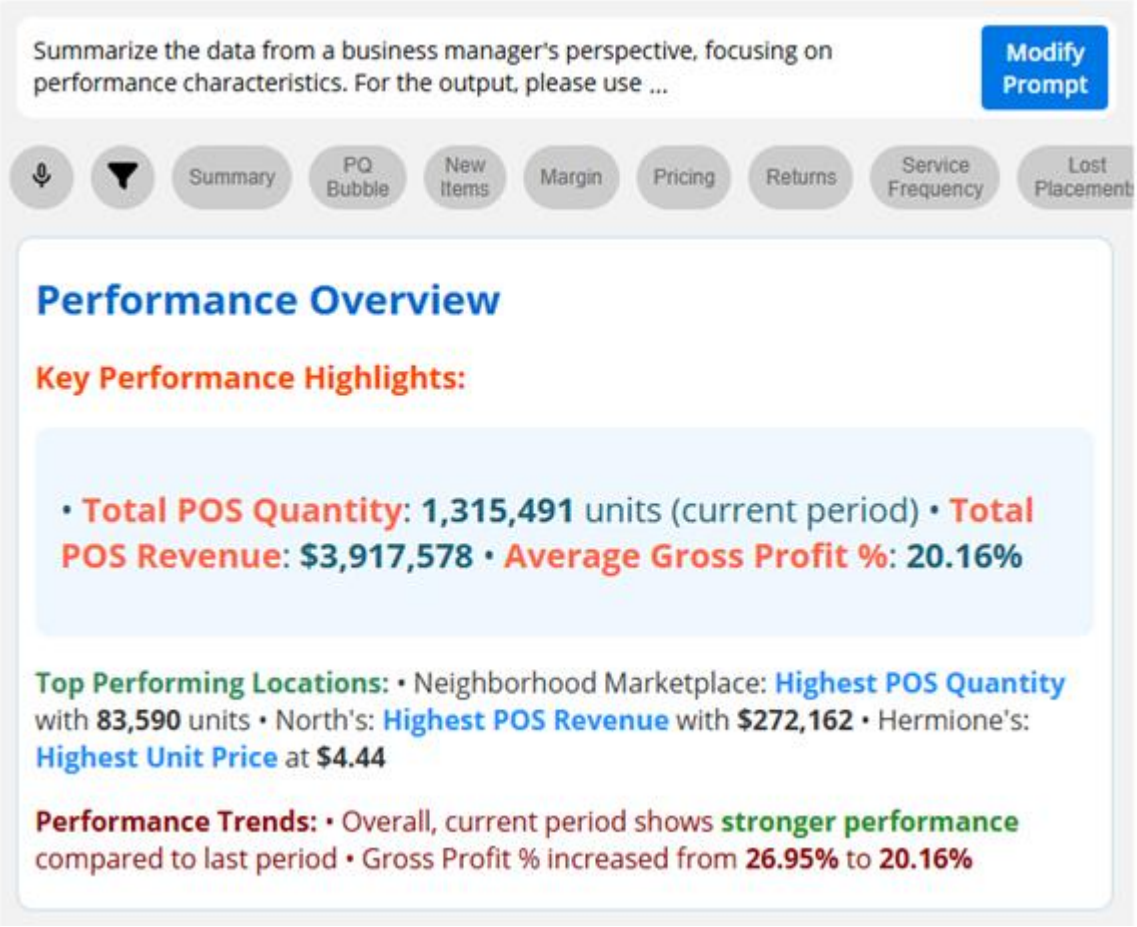
Salient Management Company is dedicated to helping our clients improve their performance and efficiency through better and faster access to actionable intelligence. We continuously strive to improve our revolutionary suite of solutions. To see videos and a full list of enhancements, go to https://releasenotes.salient.com.

Version 8.6

Leverage artificial intelligence for data analysis (in V8.6.5+)

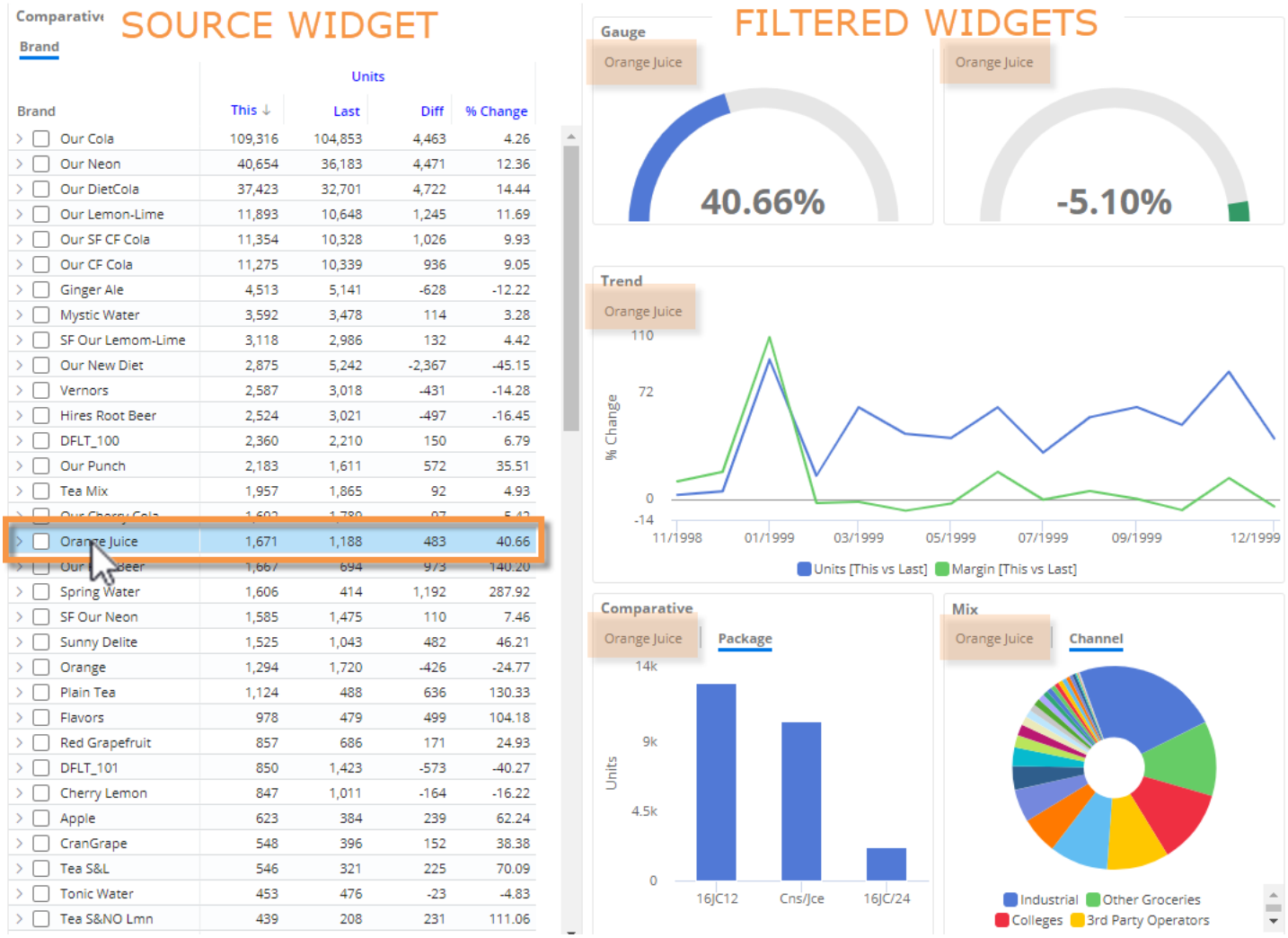
This version allows communication with a Large Language Model (LLM) using a new API endpoint in a custom view. The resulting widget can assist with analyzing the underlying grid data and performing other tasks. For example, summarize data, perform trend analysis, detect outliers, and more. The possibilities are endless. The new endpoint is compatible with leading AI providers, including OpenAI and Anthropic. Contact Salient for more information on setting up this feature.

Example:



Linked widgets (in V8.6.1+)

Widgets can be linked together to enable filtering via a single click on a "source" widget. A Dashboard Designer chooses the source widget(s) and sets up custom relationships to determine which widget(s) will be affected. Users can then click on a row, bar, pie slice, etc., in the source to quickly filter other widgets.

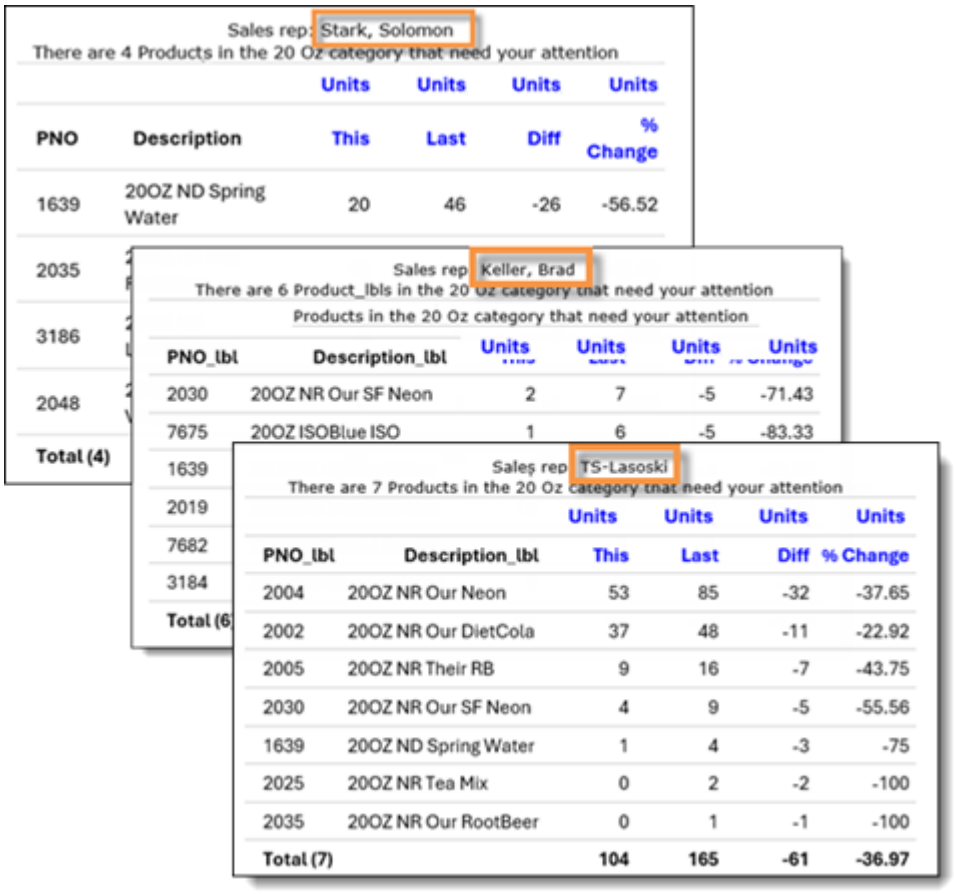


Automated notifications for each subset of data (in V8.6.1+)

You can easily send separate messages for different subsets of data using the new "for each" option—reducing the number of notification rules needed. Just select what you want to report on and choose "for each."

For example, send a notification for each sales representative using a single set of notification rules.

Other examples include notifications for each region, sales representative, product, package, etc.



Sales rep: Stark, Solomon
There are 4 Products in the 20 Oz category that need your attention

PNO	Description	Units This	Units Last	Units Diff	Units % Change
1639	20OZ ND Spring Water	20	46	-26	-56.52
2035					
3186					
2048					
Total (4)					

Sales rep: Keller, Brad
There are 6 Product_lbls in the 20 Oz category that need your attention
Products in the 20 Oz category that need your attention

PNO_lbl	Description_lbl	Units	Units	Units	Units
2030	20OZ NR Our SF Neon	2	7	-5	-71.43
7675	20OZ ISOBlue ISO	1	6	-5	-83.33
1639					
2019					
7682					
3184					
Total (6					

Sales rep: TS-Lasoski
There are 7 Products in the 20 Oz category that need your attention

PNO_lbl	Description_lbl	Units This	Units Last	Units Diff	Units % Change
2004	20OZ NR Our Neon	53	85	-32	-37.65
2002	20OZ NR Our DietCola	37	48	-11	-22.92
2005	20OZ NR Their RB	9	16	-7	-43.75
2030	20OZ NR Our SF Neon	4	9	-5	-55.56
1639	20OZ ND Spring Water	1	4	-3	-75
2025	20OZ NR Tea Mix	0	2	-2	-100
2035	20OZ NR Our RootBeer	0	1	-1	-100
Total (7)		104	165	-61	-36.97

When setting up "for each" notifications, you choose the items you want to report on by picking them individually (e.g., three sales representatives), selecting all items, or loading a saved collection of items.

You can use this new feature with benchmarking. For example, set up notifications for each sales representative that compare results to all other sales representatives.

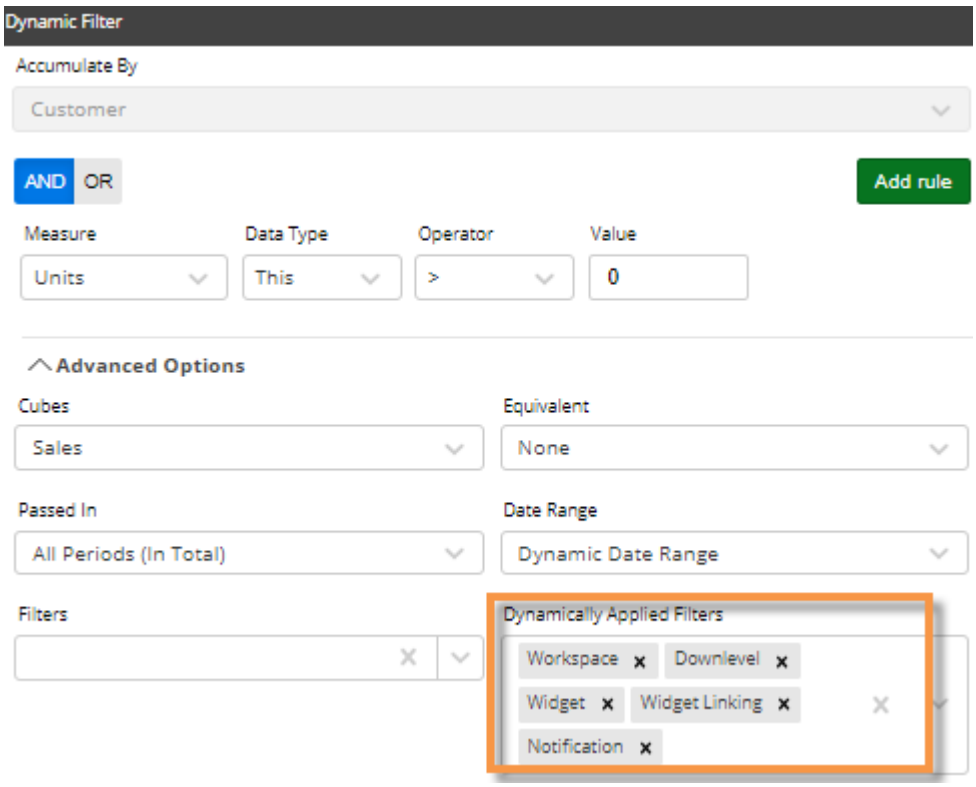
Baird, Jim - Package Sales

Sales Rep: Baird, Jim

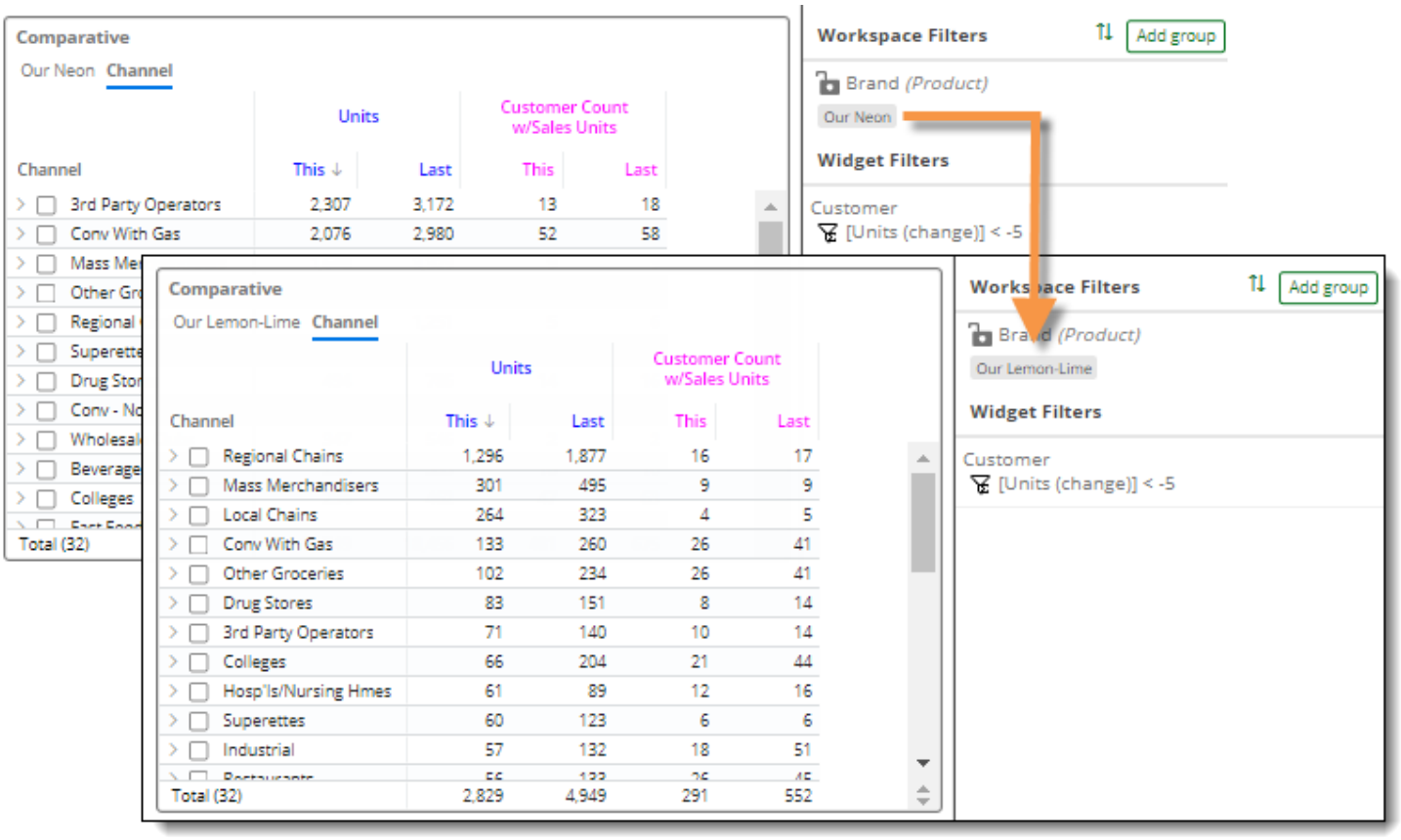
Package	Last Month Units	Last Month | All Others Units
12Pk Cn	4,028	75,144
2Ltr-8	2,224	45,755
16PNR8	1,621	17,910
6Pk Cn	692	33,050

Better control over test-based filtering (in V8.6.1+)

Test-based cohorts (i.e., dynamic filters) can update dynamically based on the filters that are currently applied to provide easier selection of specific groups of customers, products, etc. This new option is available for multiple types of filters, including widget filters, workspace filters, linked filters, downlevels, and notification filters. When this feature is on, the same filters that affect the data in the widget are automatically applied to the test to determine what passes or fails—streamlining the process of narrowing down on what interests you.



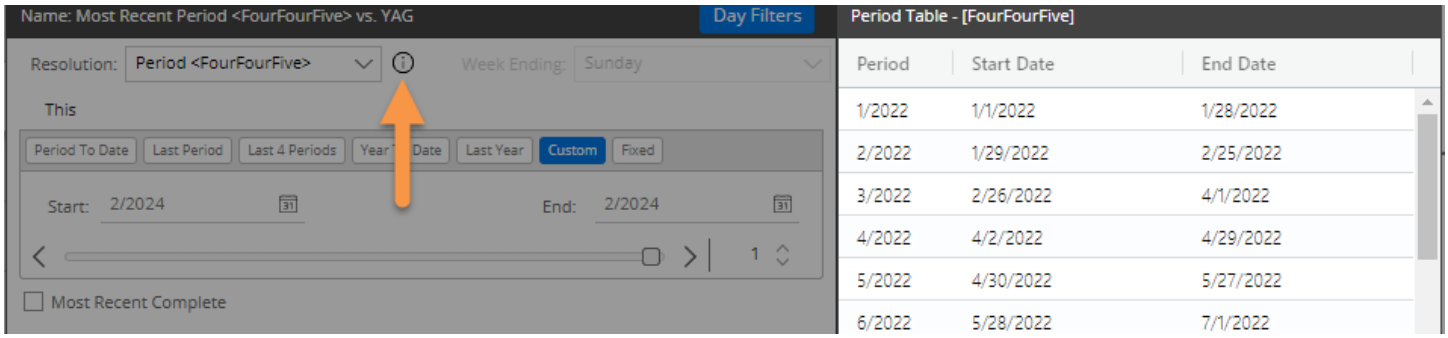
For example, view sales of a particular product to customers with declining sales for that product. Just click to switch to the same analysis for a different product. The resulting cohort will update automatically based on whatever you select in the filter.



When used with notifications, the dynamic test can use the filters that are applied in the notification settings, including "per recipient" or "for each" filters—allowing you to automatically send data for different cohorts based on the same widget. See an example.

Fiscal period table information (in V8.6.1+)

You can access information about your organization's custom fiscal periods, including start and end dates of each period, within Salient Dashboards.



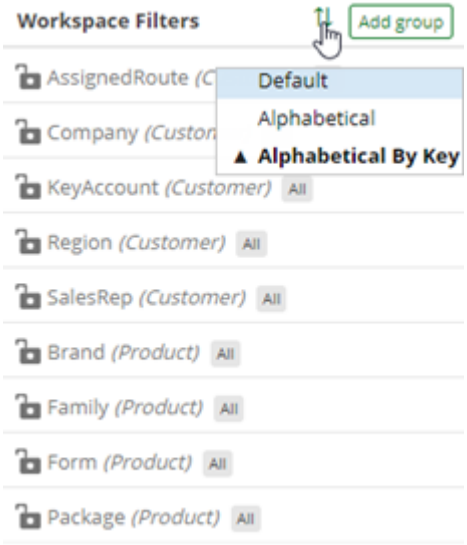
Scannable barcodes (in v8.6.1+)

Salient Dashboards can display UPCs as barcodes. This feature allows users to scan barcodes directly from dashboards rather than manually entering product numbers—increasing the efficiency of business operations. Barcode rendering requires some administrative setup.

Dashboard design features (in V8.6.1+)

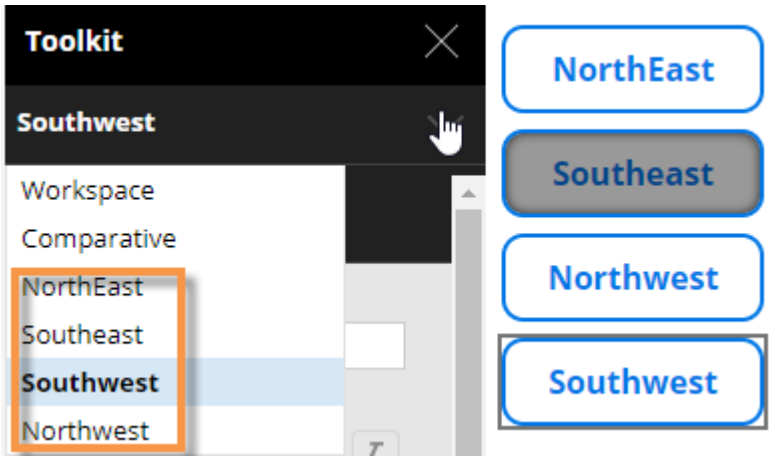
Filter sorting

You can sort workspace filters alphabetically or alphabetically within each key category (customer, product, etc.) to organize the panel and make filters easier to find.



Button names

The toolkit and tab settings show button names, making it easier to move, edit, and delete buttons in complex dashboards.

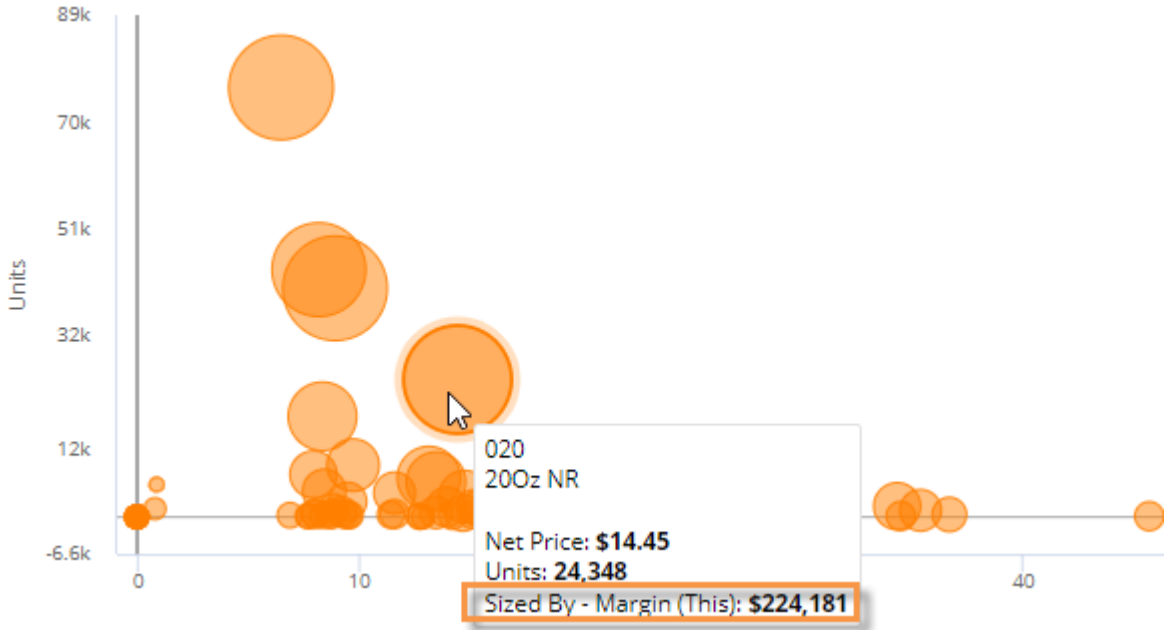


Scattergram enhancements

Bubble chart

This version includes a "bubble" chart to display three or more metrics in an engaging visualization of trends, correlations, and outliers. Like a traditional scatter plot, the bubble chart positions markers along two axes. A third variable determines the size of each bubble, adding another layer of information like each point's relative importance. A fourth variable can be used to color the bubbles as explained below.

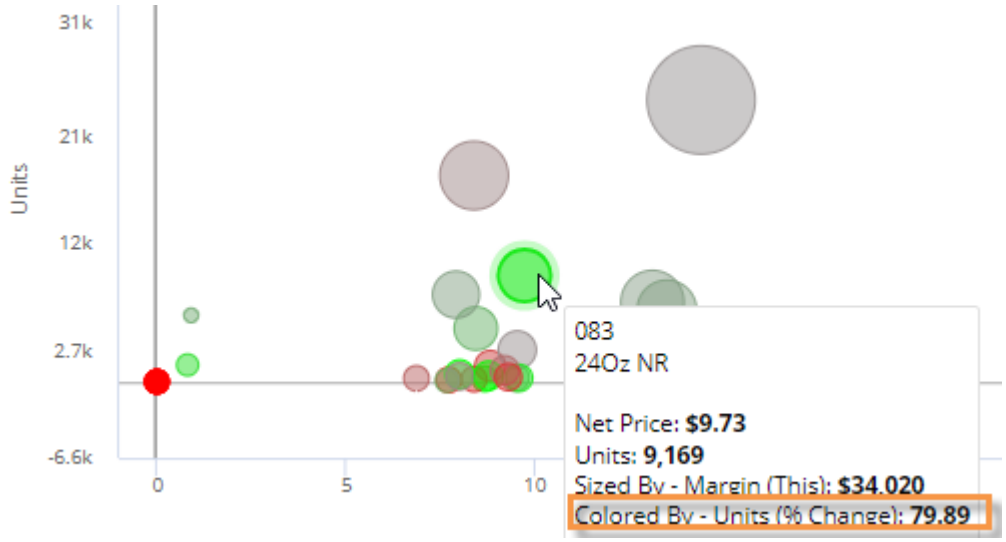
For example, what is the relationship between price and volume among packages and which package contributes the most to margin?



Color scatter plot

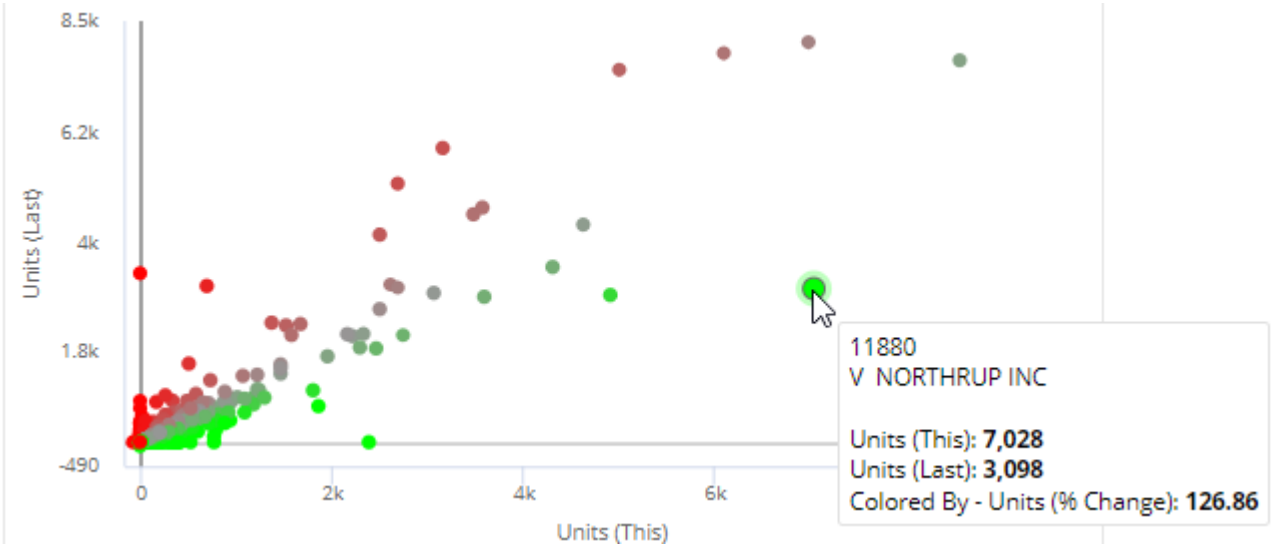
A scatter plot can use colors to represent an additional variable—enhancing visualizations and providing more information, such as variance since another time period. Choose any measure and pick your preferred color gradient, or set custom highlighting ranges. These options are available for the traditional scatter plot or the new bubble format.

For example, visualize percent change in addition to price, volume, and margin.



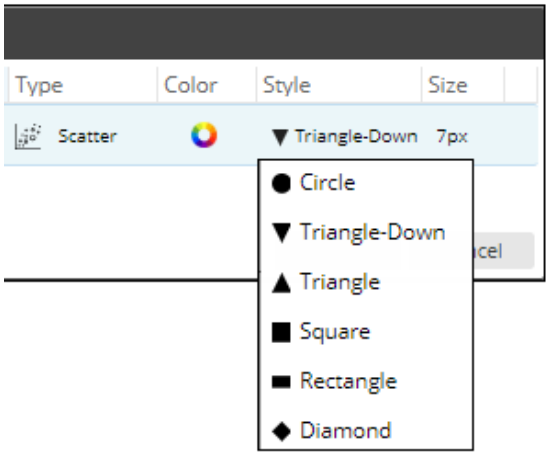
Cross-date scatter plot

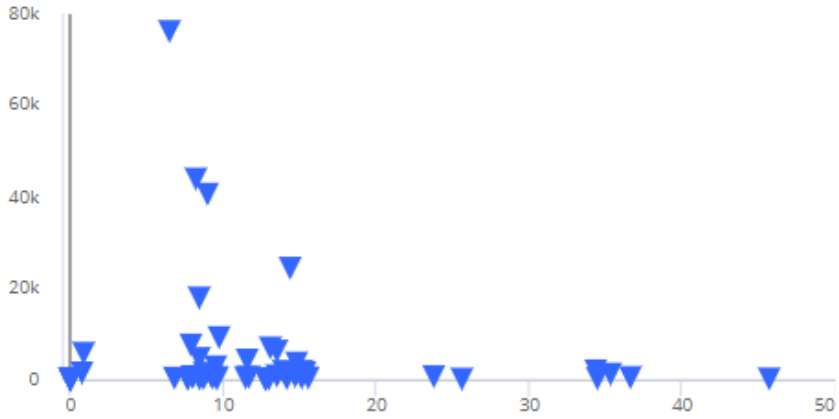
You can compare timeframes by plotting members for one date range versus another date range for a single metric. This type of scatter plot can show trends and outliers across date ranges, such as: Did customers buy more this period or last? Who or what did not fit this pattern?



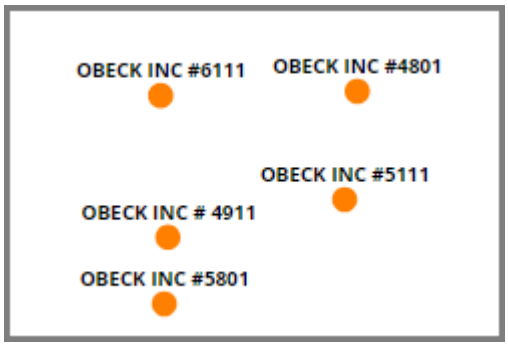
Customization options

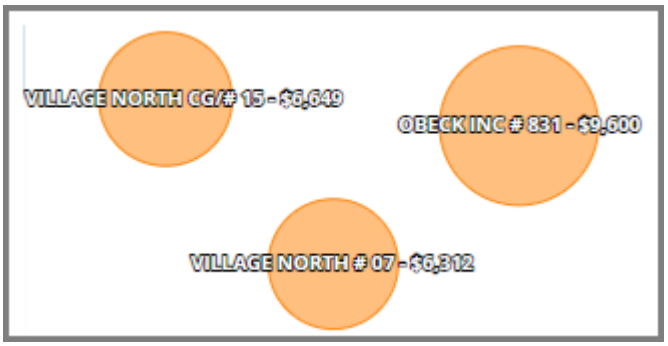
More options are available to customize traditional scatter plots. You can choose the color, size, and symbol of points.





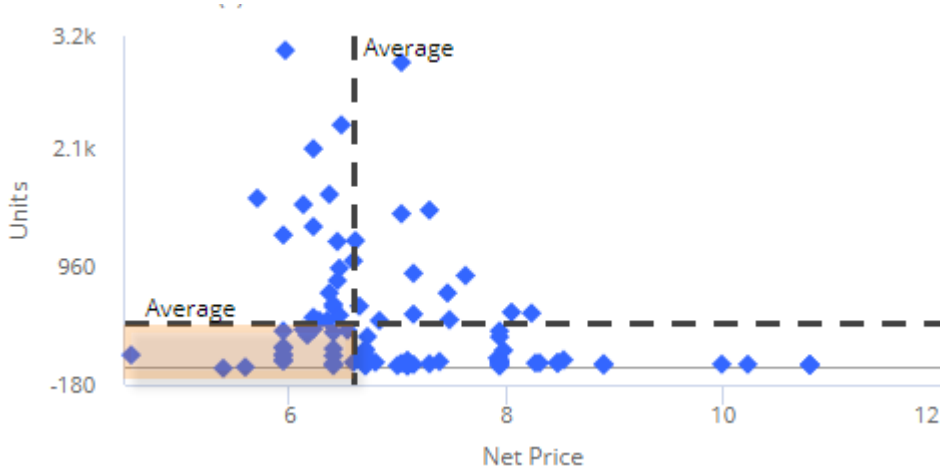
You can turn on labels to show what each point or bubble represents. In a bubble chart, the labels can show names and/or data values.





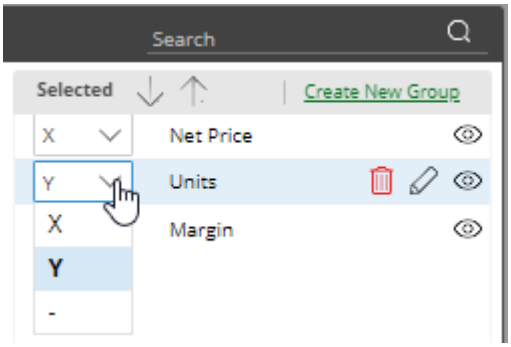
Scattergram quadrants

Custom reference lines can be added to create quadrants based on custom values or data averages. The quadrants make it easy to visualize and select data points. For example, select customers with below average price and volume.



Easier selection of scattergram measures

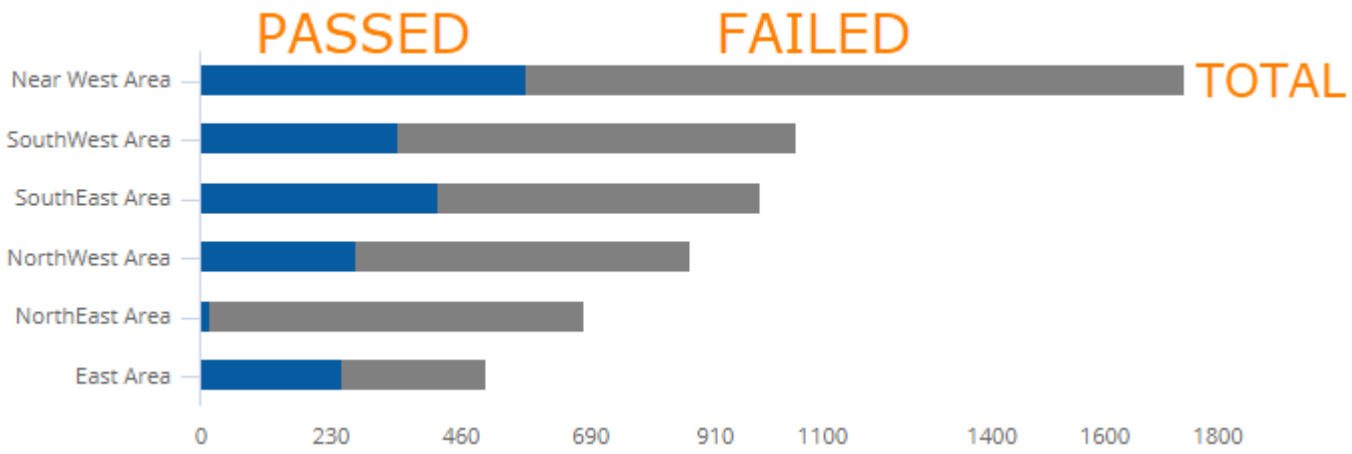
The user interface has been updated to provide more intuitive selection of x and y axis measures.



Exception improvements

Graph how many passed and failed (i.e., actual numbers)

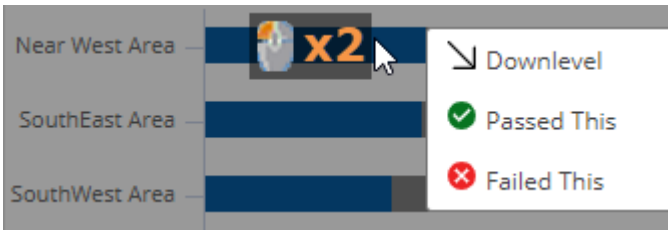
You can chart the actual counts of how many passed and failed in an exception graph. In addition to showing pass/fail results, this new capability allows you to visually compare the total members in each grouping. For example, see the total number of customers in each region broken down by how many did and did not buy something.



The percent exception graph from previous versions is also available.

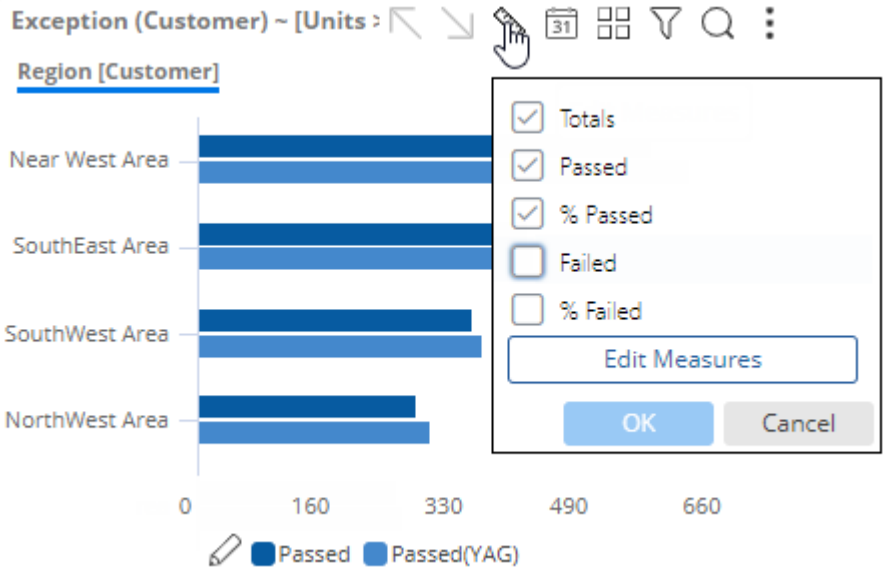
New graph shortcut to list what passed or failed

Just double-click in an exception graph to list what passed or failed. For example, list customers from a selected region that passed the test. This new shortcut also allows you to downlevel to the next dimension.



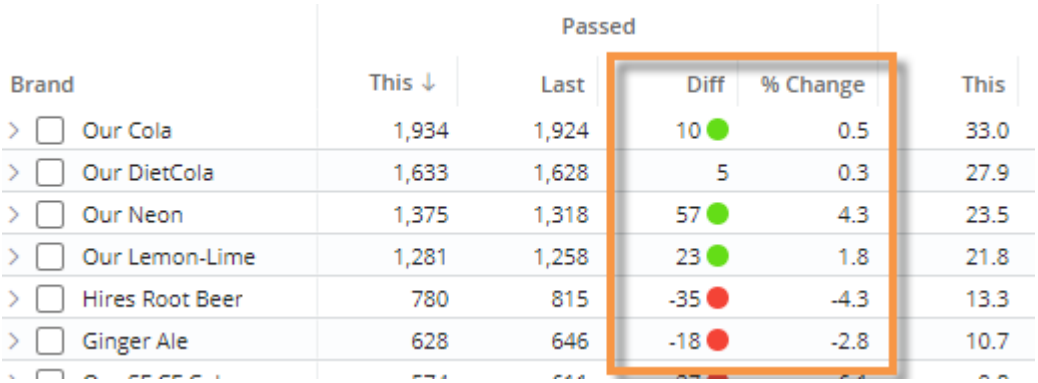
Pick what to graph

You can hide passing or failing members to simplify the graph.



Difference and percent change in how many passed/failed

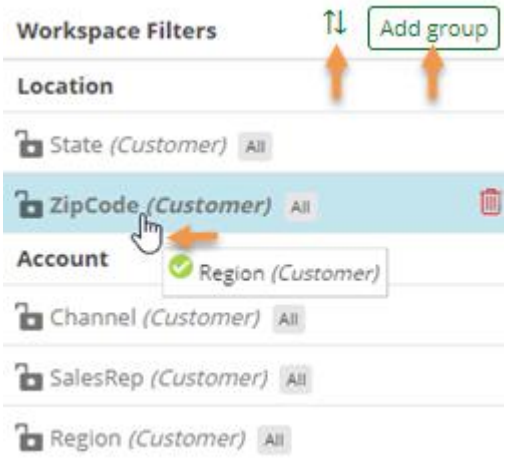
Exception grids can include difference and percent change calculations. These new columns show changes in how many members (customers, products, etc.) pass or fail custom test criteria. For example, how many more or fewer customers bought each brand this month versus last month? As always, you can choose the test settings, groupings, and date ranges to compare.



	Passed				
Brand	This ↓	Last	Diff	% Change	This
Our Cola	1,934	1,924	10	0.5	33.0
Our DietCola	1,633	1,628	5	0.3	27.9
Our Neon	1,375	1,318	57	4.3	23.5
Our Lemon-Lime	1,281	1,258	23	1.8	21.8
Hires Root Beer	780	815	-35	-4.3	13.3
Ginger Ale	628	646	-18	-2.8	10.7

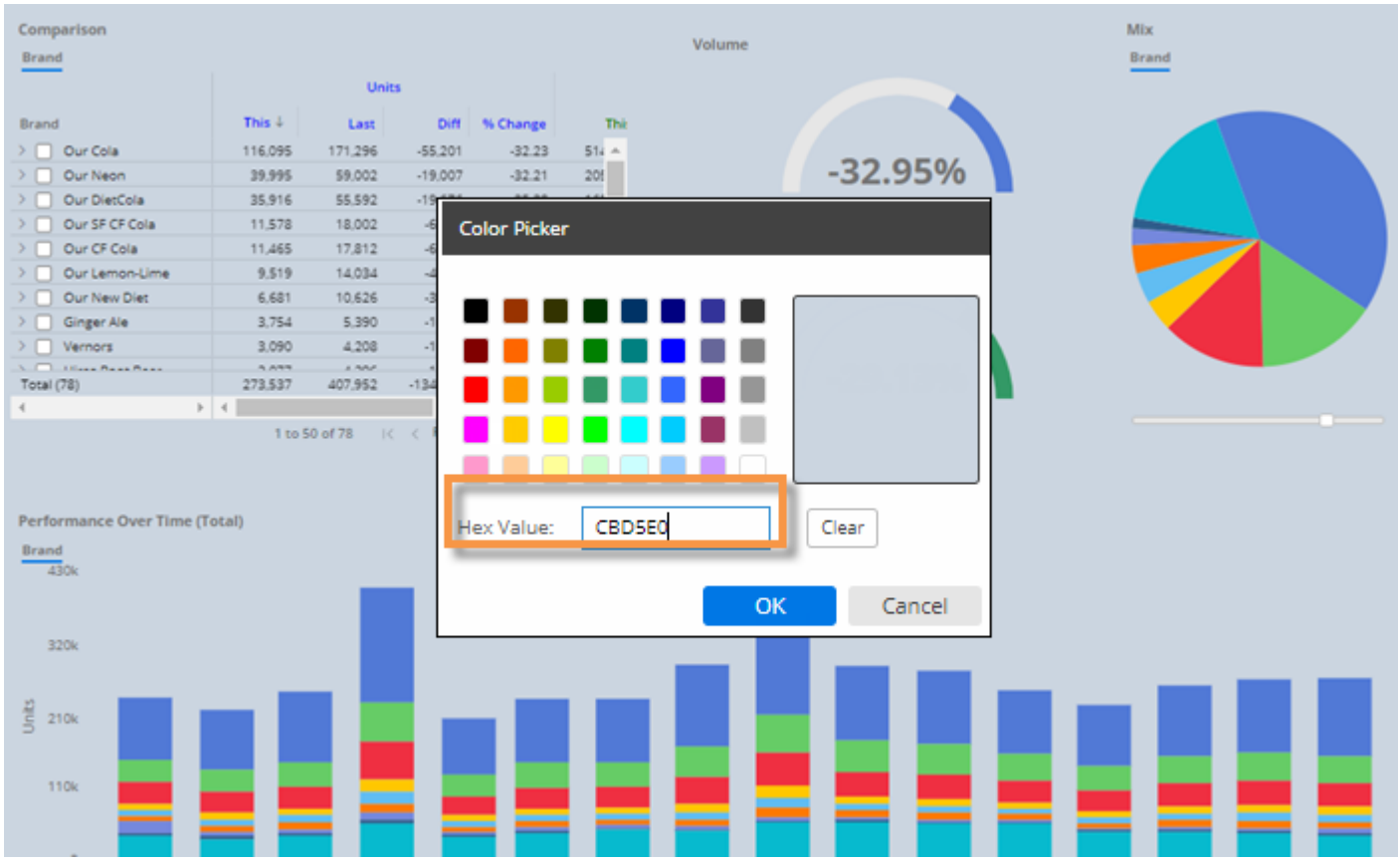
Filter groups

You can organize workspace filters under custom groups to make them easier to find. For example, place filters related to geographic locations under one group and account filters under another group.



Custom background colors

Dashboards can be enhanced with custom background colors. This new feature works with widget transparency to provide a streamlined appearance. In the dashboard layout, Dashboard Designers can choose from a color palette or enter a HEX value to define a custom color.



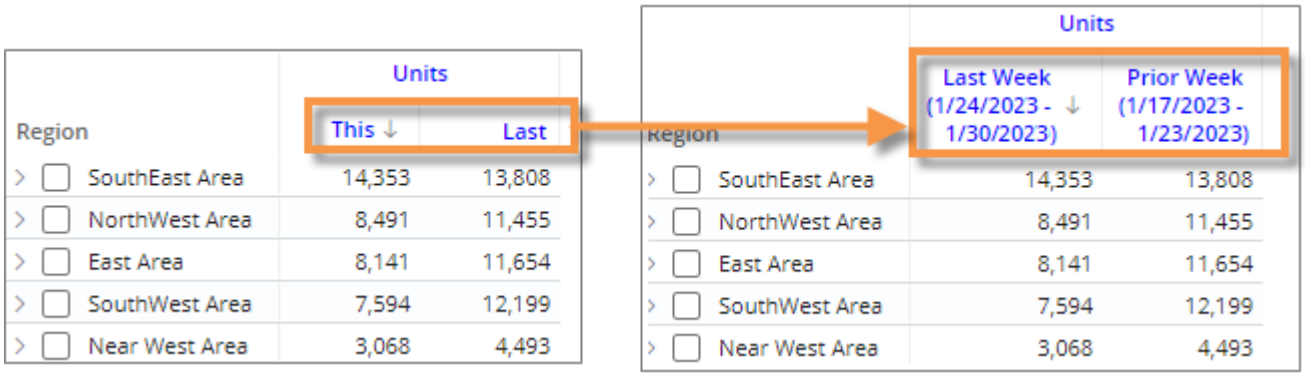
More information about the timeframe

Date details in column headers

Column headers in Comparative and Multi Comparative grids can show more information about the dates being reported. The headers can include:

- Descriptions based on the resolution, number of dates, and other date settings (e.g., Month To Date, Last 4 Weeks, Year To Date, YAG, Prior Month, etc.).
- Beginning and ending dates of the date ranges—with or without days of the week.

When used, these new options replace the default "This" and "Last" column headers.



Region	Units	
	This ↓	Last
SouthEast Area	14,353	13,808
NorthWest Area	8,491	11,455
East Area	8,141	11,654
SouthWest Area	7,594	12,199
Near West Area	3,068	4,493

Region	Units	
	Last Week (1/24/2023 - 1/30/2023) ↓	Prior Week (1/17/2023 - 1/23/2023)
SouthEast Area	14,353	13,808
NorthWest Area	8,491	11,455
East Area	8,141	11,654
SouthWest Area	7,594	12,199
Near West Area	3,068	4,493

Embedded date descriptions in email notifications

Emails that contain embedded data from notifications can include descriptions of the dates being reported. To add this information, insert a quick expression when setting up the notification.

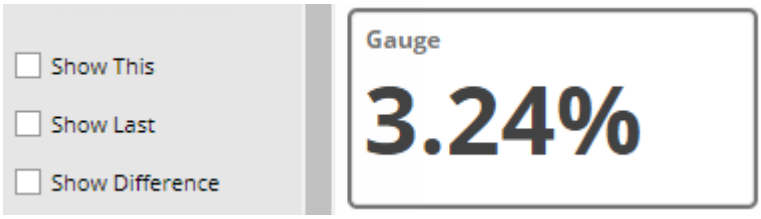
Notification: Package Comparison vs. YAG

Date Range: 1/1/2022 Sat - 1/31/2022 Mon (1 Month) vs. 1/1/2021 Fri - 1/31/2021 Sun (1 Month)

	Units	Units	Units	Units	Net Margin	Net Margin	Net Margin	Net Margin
Package	This	Last	Diff	% Change	This	Last	Diff	% Change
Cups	2,700	3,890	-1,190	-30.59	($1,408)	($2,140)	732	34.21
Lids	629	942	-313	-33.23	($441)	($888)	448	50.4
16 Oz ND	187	280	-93	-33.21	$2,451	$1,311	1,140	86.97

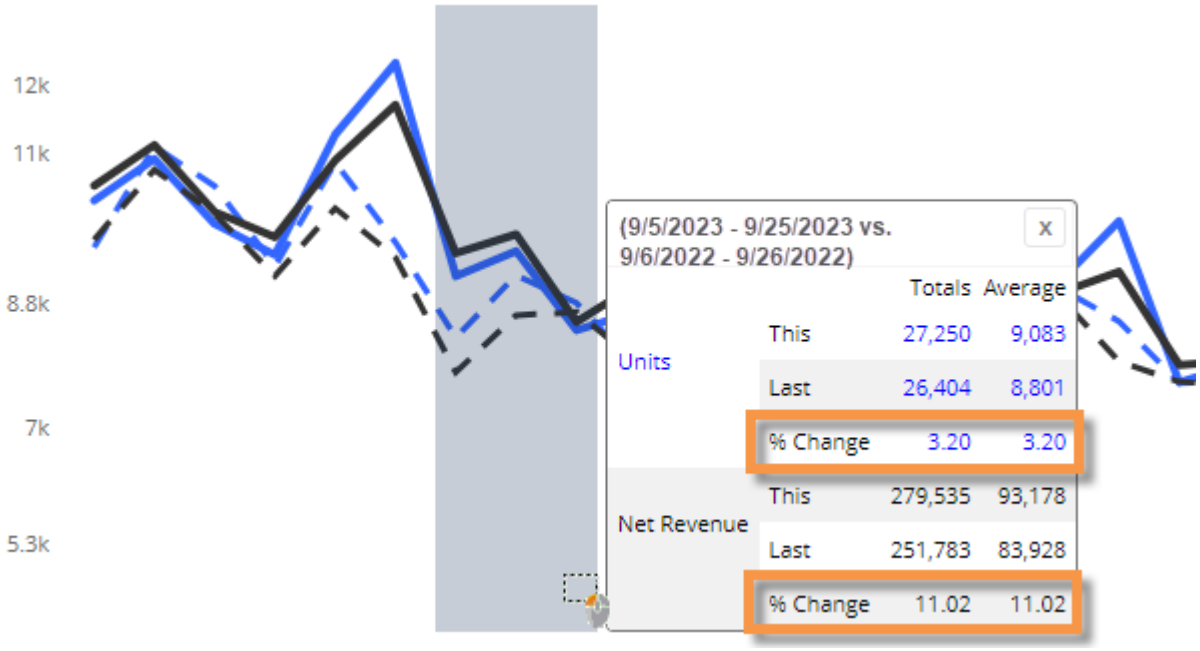
Streamlined numeric gauge

New graph settings let you customize and streamline numeric gauges by hiding extra information, such as data values and difference.



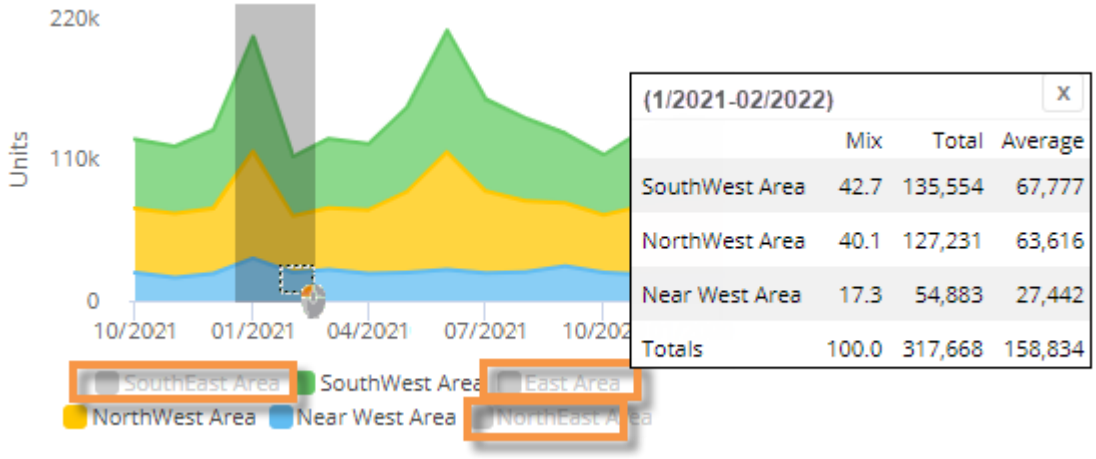
Variance metrics in comparative trend windows

As always in Salient Dashboards, you can click and drag in a trend chart to see values for specific periods of time (i.e., rubber-banding). Now, if the trend compares two date ranges, the window also shows percent change compared to the corresponding dates. For example, how much more was sold during a three-week period this year versus the same three weeks last year?



Simplified share trend windows

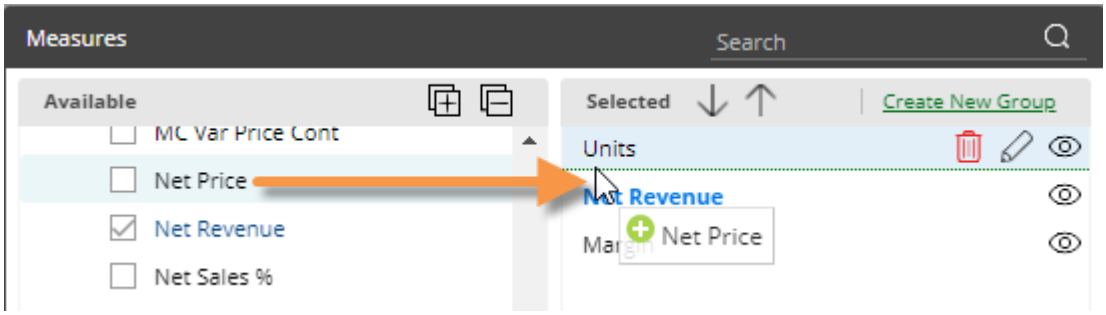
If you hide items in a share trend graph prior to selecting dates (i.e., rubber-banding), the data windows will omit the hidden members—making it easier to view and compare what you are interested in.



Easier measure selection

Drag-and-drop functionality

When adding a measure, you can drag and drop it to a specific position in the list for faster control over how measures are arranged.



Quick-pick measures in Waterfall widgets

Multiple calculated measures can be added to a Waterfall widget to make it easier for users to switch between them. As always, the Waterfall widget will break down the selected measure into its component parts.

This option is located at the bottom of the measures setup area.

Source widget information in exported files

When you export data to a CSV or XLSX file, the file header will show the data source, including the dashboard name, tab name (if applicable), and widget name.

	A	B	C	D	E	F	G	H	I	J	K
1	Exported On: 12/7/2023 11:03:28 AM										
2	Comparative ~ Date Range: 1/1/2023 Sun - 1/31/2023 Tue (1 Month) vs. 1/1/2022 Sat - 1/31/2022 Mon (1 Month)										
3	Total Company: 2										
4	Dataset: DS										
5	Source: Monthly Sales > Tab Group > Overview > Comparative										
6	User: JDOE										
7	Cube: Sales										
8	By: Company										
9	Sort: Margin: This: Descending										
10			Margin	Margin							
11		Company	This	Last							
12		Company	116826	1751830							

Cross-dataset dashboard importing

This version has improved logic to match up components by name (e.g., measure name) and then by ID if necessary when importing dashboards. As a result, dashboards can more easily be re-used across different datasets if naming conventions are the same.

Flat data notifications

You can send notifications based on flat grid data. In this grid type, each attribute has its own column; rows can be sorted independently. Notifications were previously limited to standard grid data.

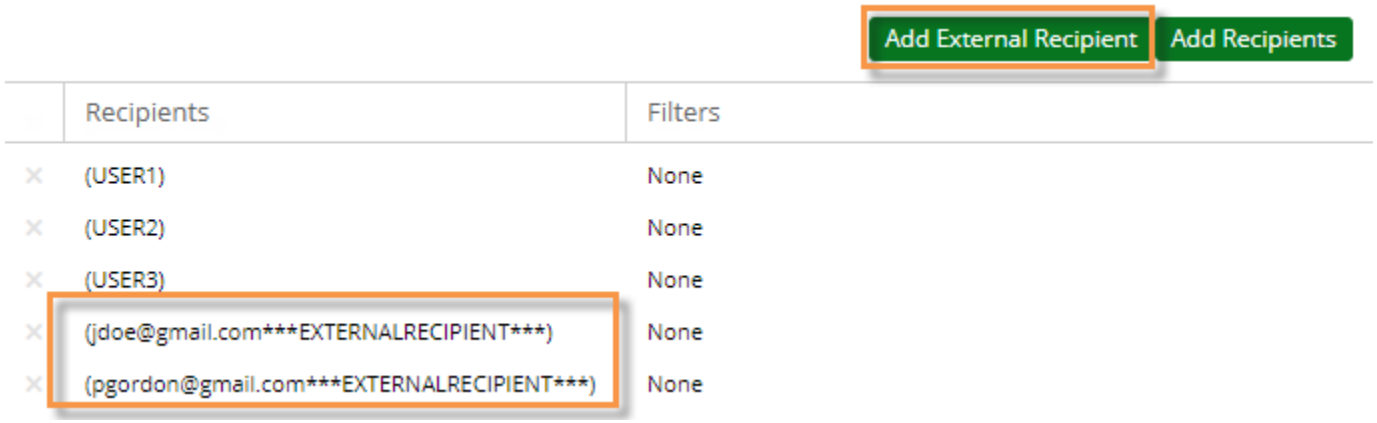
			Units			
Channel	Brand	Package	This ↓	Last	Diff	% Change
Regional Chains	Our Cola	12Pk Cn	15,488	24,130	-8,642	-35.81
Regional Chains	Our Cola	16PNR8	6,326	7,982	-1,656	-20.75
Local Chains	Our Cola	12Pk Cn	5,729	6,824	-1,095	-16.05
Mass Merchandisers	Our Cola	12Pk Cn	5,656	8,262	-2,606	-31.54

Version 8.5

Notification enhancements (in 8.5.1+)

External recipients

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



Notes:

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

Multi Comparative notifications

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

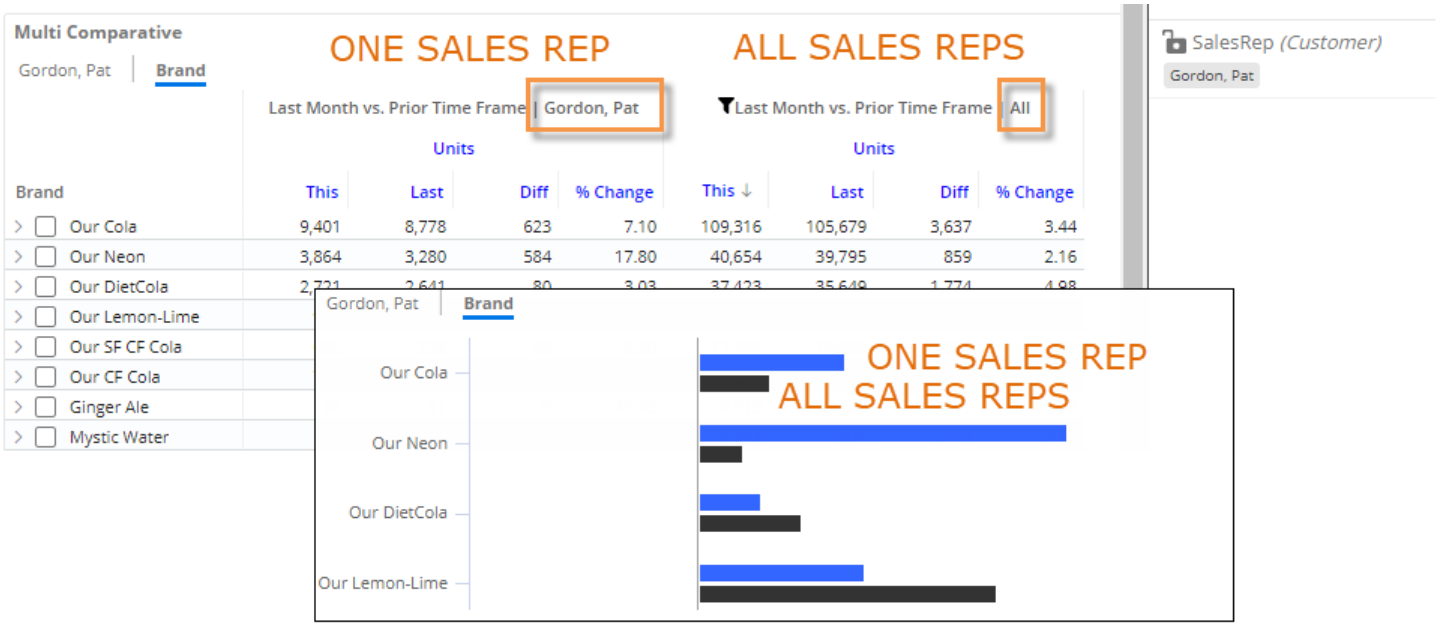
Dashboard Notification

Notification: Benchmark by sales rep

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

"All" benchmarks (in 8.5.1+)

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



Simplified settings in explore mode (in 8.5.1+)

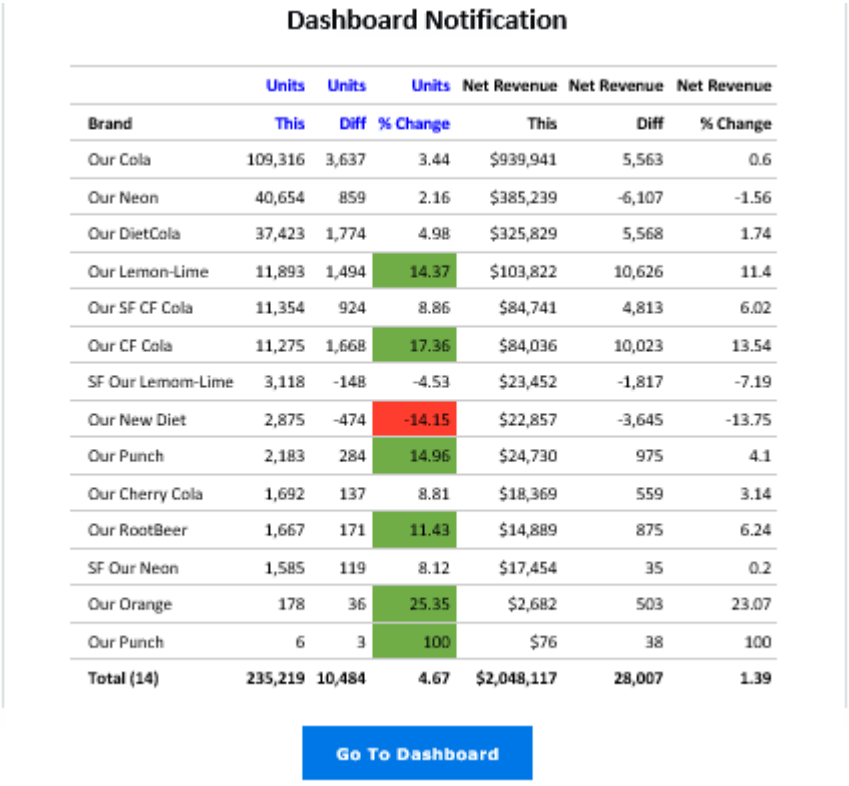
The following settings have been removed from the General Settings area of explore mode because they are related to dashboard design and management rather than data investigation: Hidden; Show in Mobile; Hide for Phone; and Enable Export.

Version 8.4

Notification improvements (in V8.4.7+)

Embedded data

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



Dashboard Notification

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

Go To Dashboard

Filter data by recipient

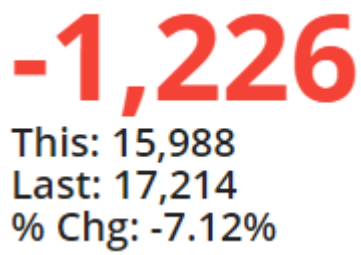
Recipient filters allow you to efficiently manage the distribution of relevant data to multiple users. You can use a single notification and apply filters based on user role or security level to create custom reports—reducing setup and maintenance time. For example, send each manager his or her own results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

Graph difference between timeframes (in V8.4.7+)

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

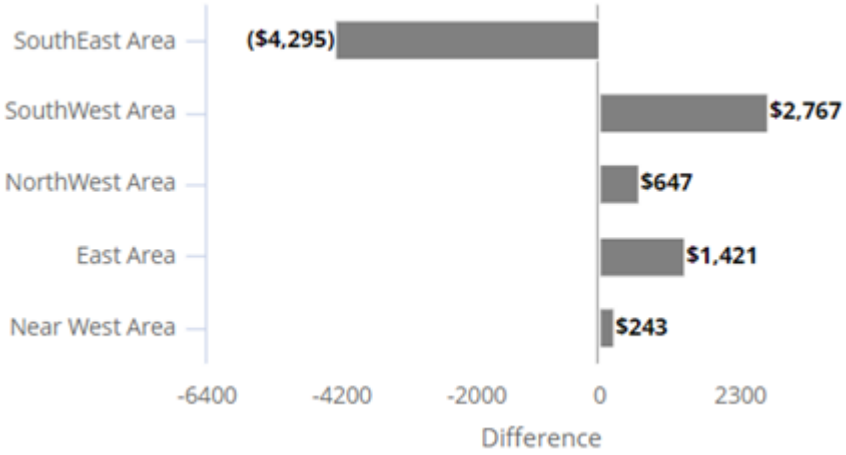
Gauge

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



Comparative/Multi Comparative

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

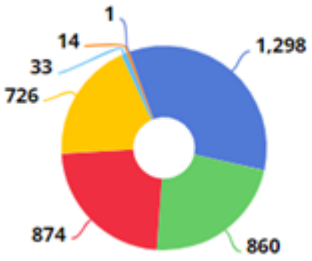


Trend/Comparative Time Series

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

Mix

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



Better sorting (in V8.4.7+)

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

Additional sort levels

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

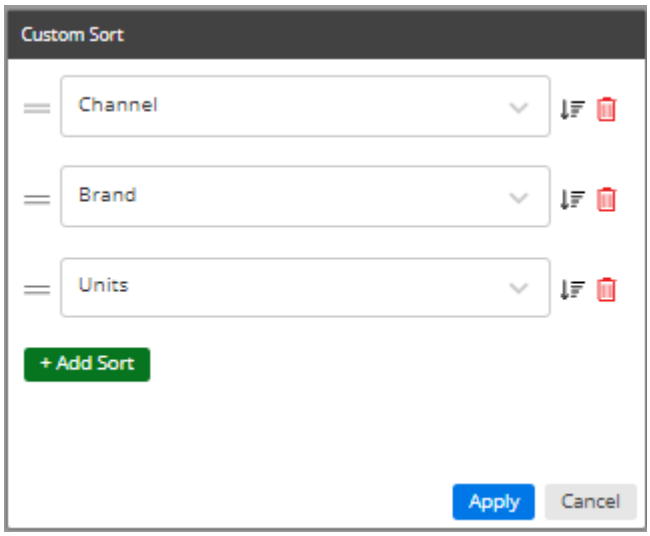
Sort by sales for this period to see lost customers (sales of zero) at the top; choose sales for last period as a secondary sort to rank the lost customers.

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

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

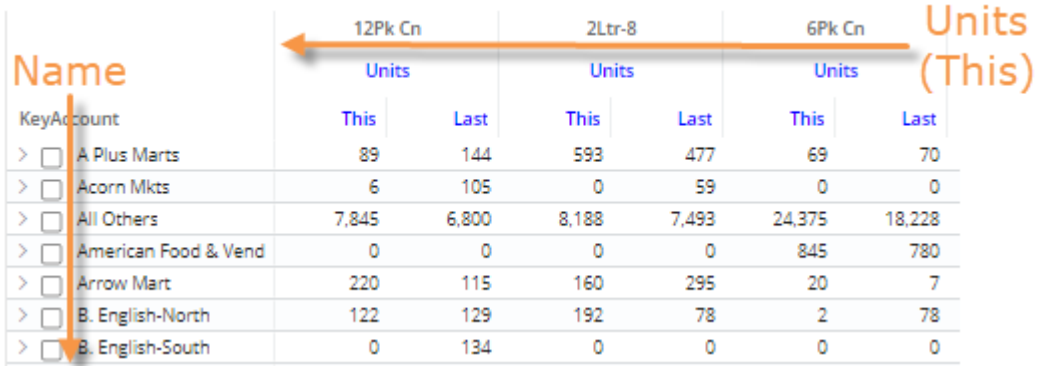
Channel	Package	Brand	Units	Net Revenue	Net Price	Margin
Wholesale Clubs	6Pk Cn	Our Cola	323	209	0.65	100
Wholesale Clubs	6Pk Cn	Our DietCola	205	129	0.63	56
Wholesale Clubs	2Ltr-8	Our Cola	200	132	0.66	47
Wholesale Clubs	6Pk Cn	Our Neon	10	71	7.10	32
Wholesale Clubs	6Pk Cn	Our Lemon-Lime	5	5	1.02	3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

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



Sort multiple ways in Crosstab

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



	12Pk Cn		2Ltr-8		6Pk Cn	
KeyAccount	Units		Units		Units	
	This	Last	This	Last	This	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

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

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

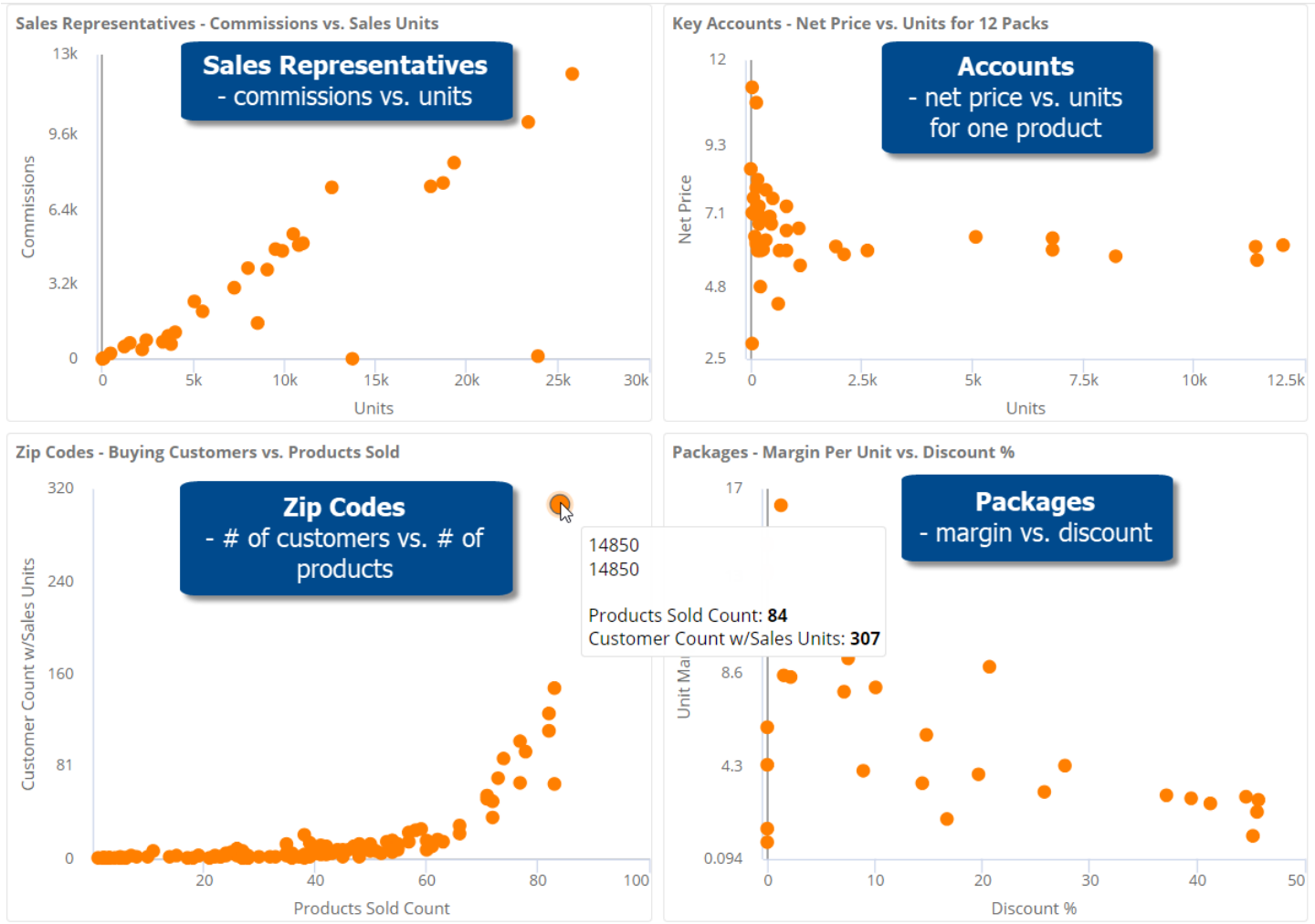
- Column Mix (Mix - C) - shows percent of the total of all columns (e.g., one brand in a region over all brands in that region).
- Row Mix (Mix - R) - shows percent of the total of all rows (e.g., one brand in a region over that brand in all regions).
- Total Mix (Mix - T) - shows percent of the total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

	Mocha Coffee 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

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

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

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



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

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

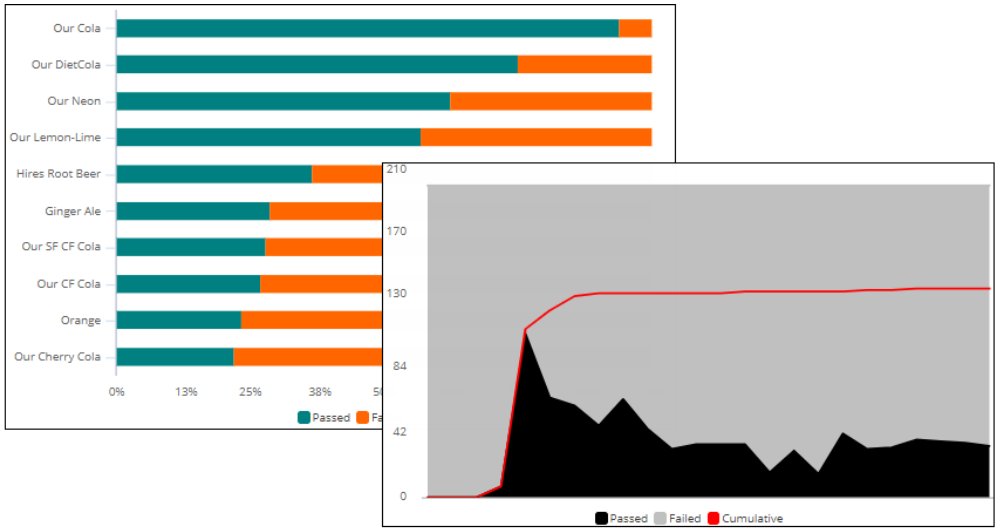
Improved sharing of dashboards with private collections (in V8.4.7+)

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

Exception enhancements (in V8.4.5+)

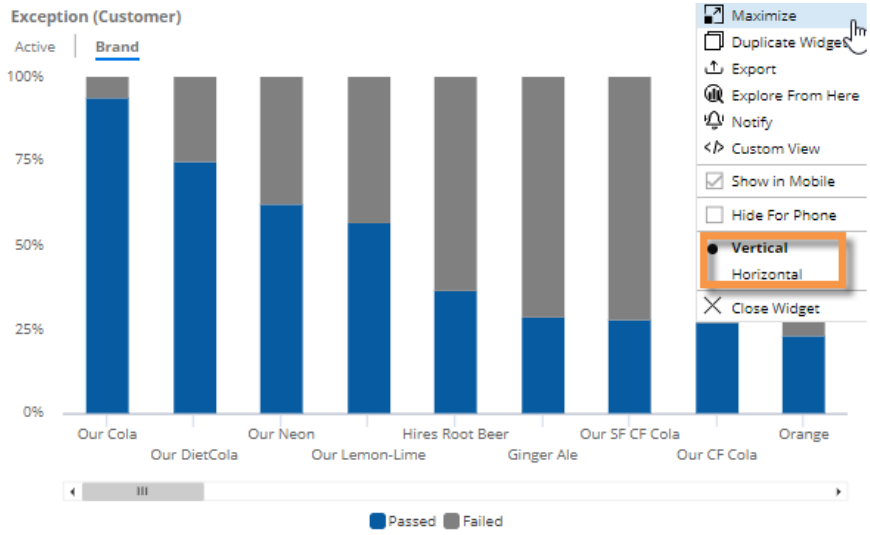
Custom graph colors

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



Multiple bar graph formats

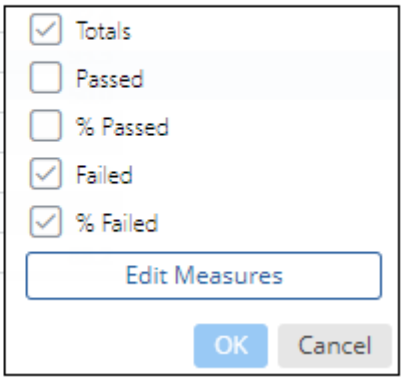
Choose horizontal or vertical bars in comparative exception graphs.



Simplified exception widgets

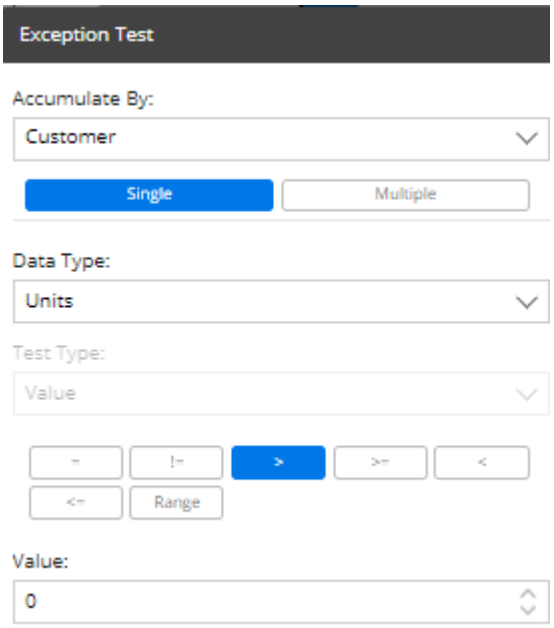
You can hide exception metrics to simplify the screen. For example, you could remove columns for passing customers if you are only interested in failing customers. After removing metrics, you can easily add them back using the measures tool.

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



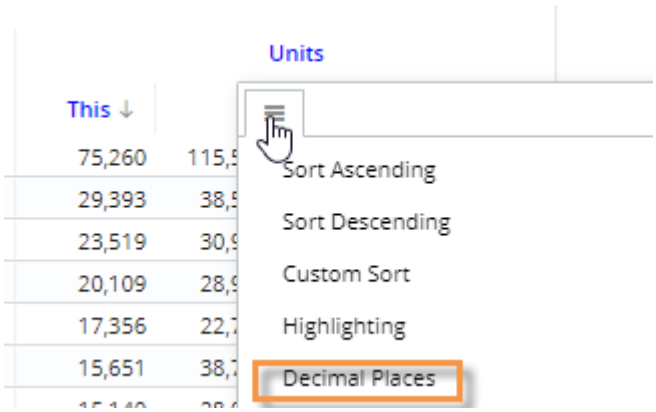
Improved test criteria

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



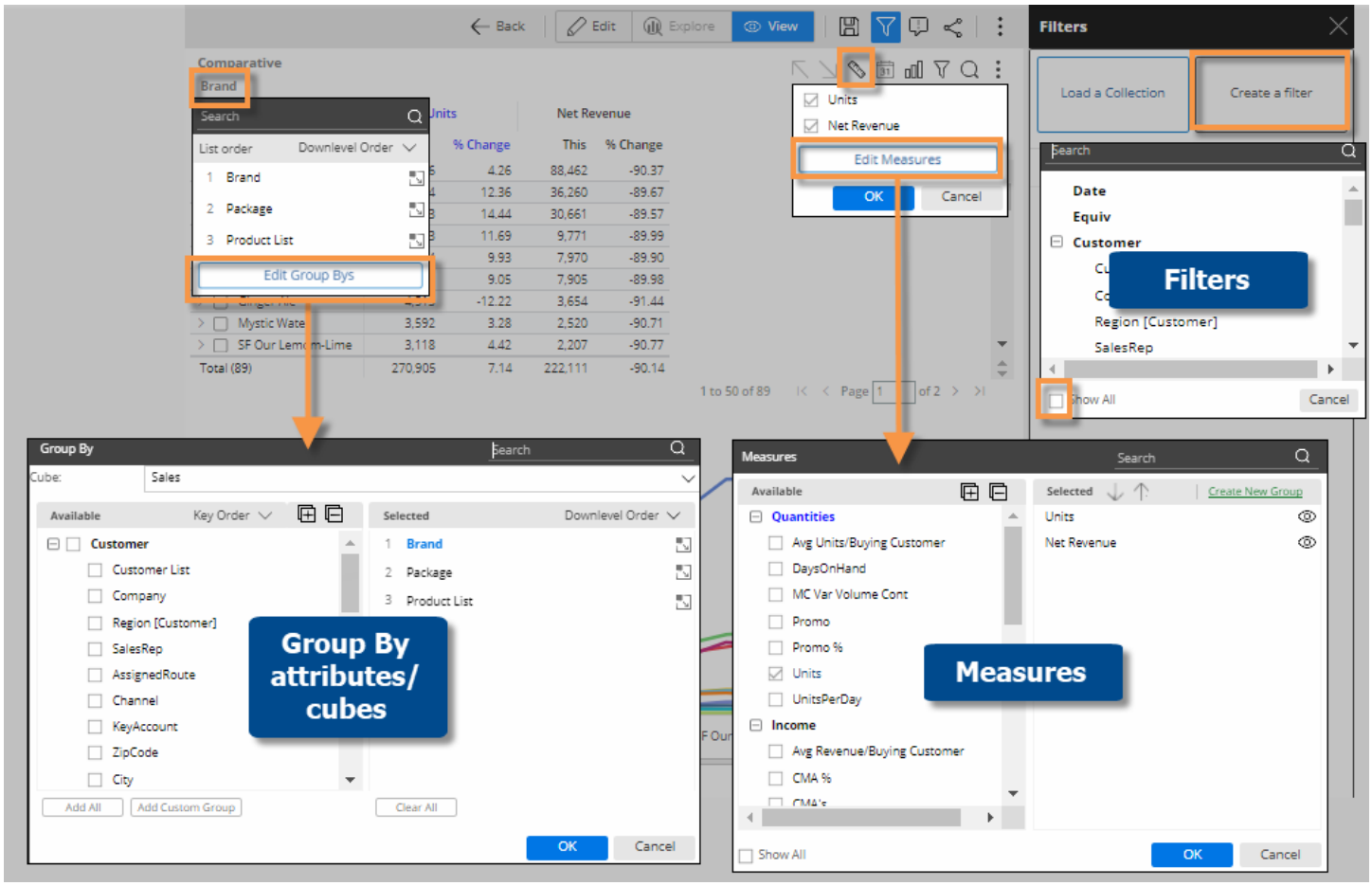
Custom precision (in V8.4.5+)

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



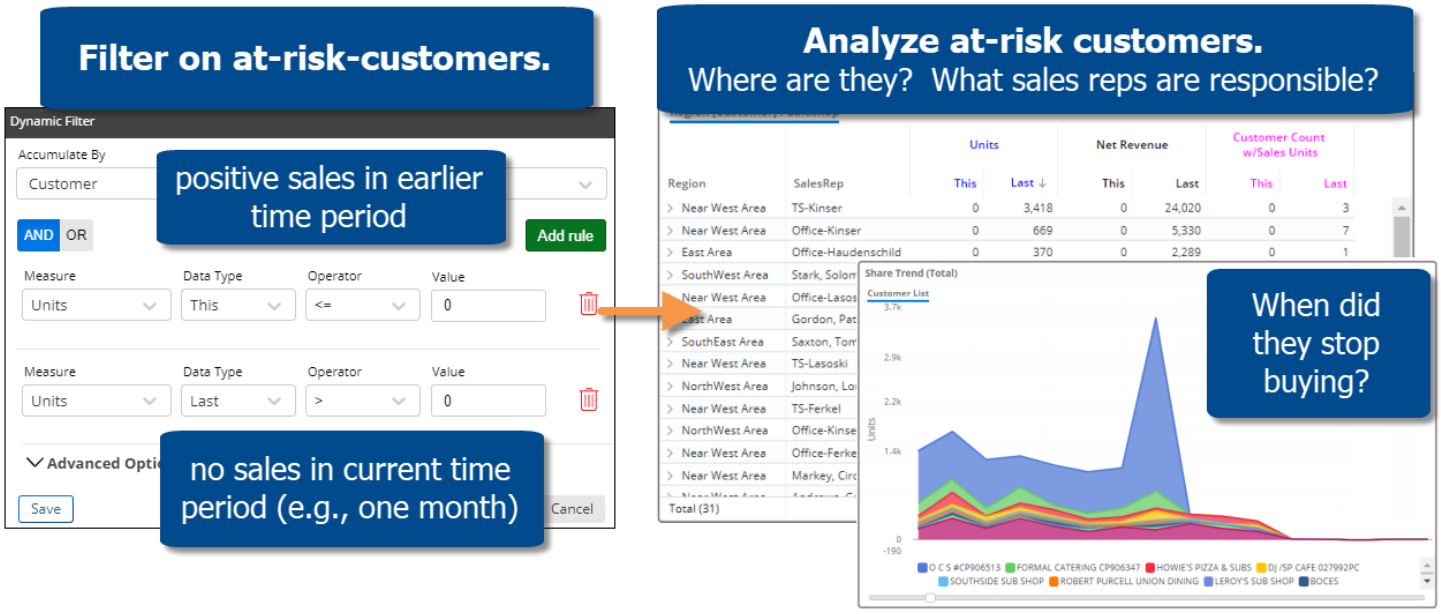
More access to data for Power Viewers

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



Dynamic filters

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



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

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

Column filtering in Multi Comparative

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

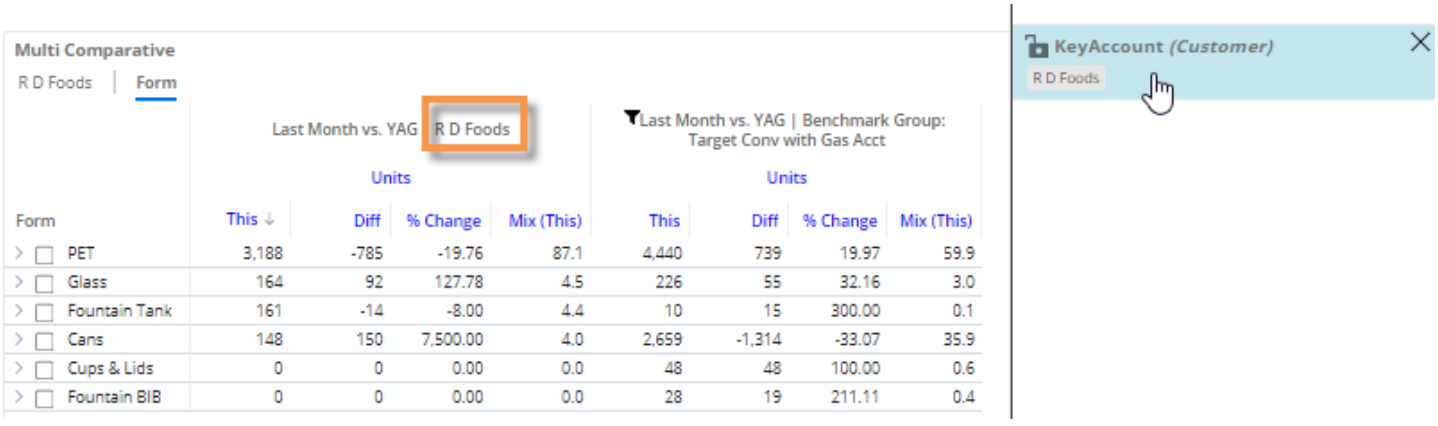
Individual column filters

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

	All Products		▼Our Cola			▼12 Pack Cans		▼Our Carbonated Brands		▼Products with Net Price > $10	
	Units		Units			Units		Units		Units	
Channel	This ↓	% Change	This	Last	% Change	This	% Change	This	% Change	This	% Change
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

Dynamic benchmarking

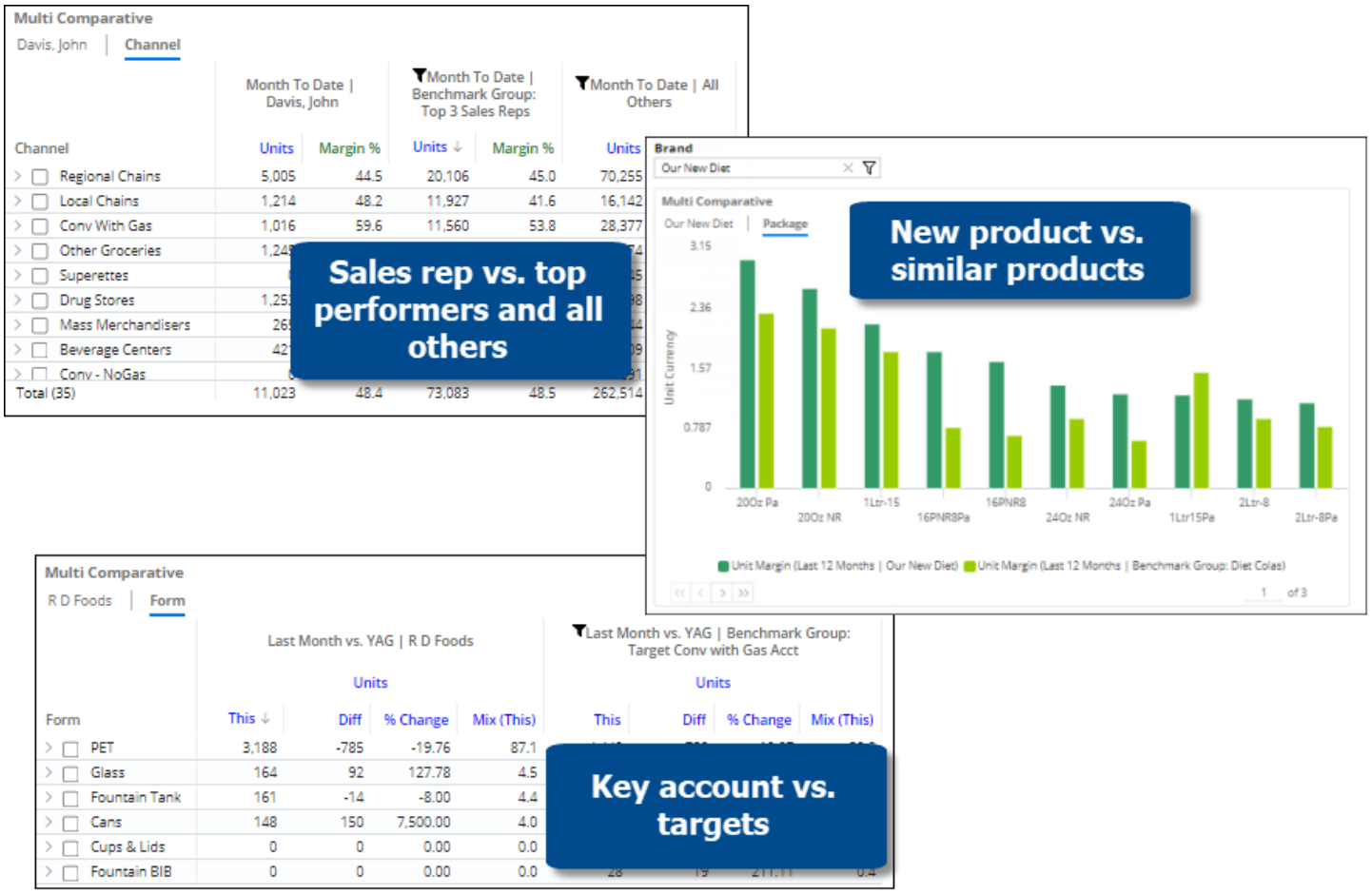
Apply a dashboard filter and set up columns to compare performance against benchmarks, such as industry bests and standards. This method of column filtering allows users to select what they want to compare from a menu. For example, compare a single account to "all others" and/or a top-performing group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



Example uses:

- Compare any sales rep to all others—are they doing better or worse than average?
- Compare margin, price, etc., for a new product to similar products.

- Investigate any account—how does product mix compare to top-performing accounts; what metrics are better or worse than average?

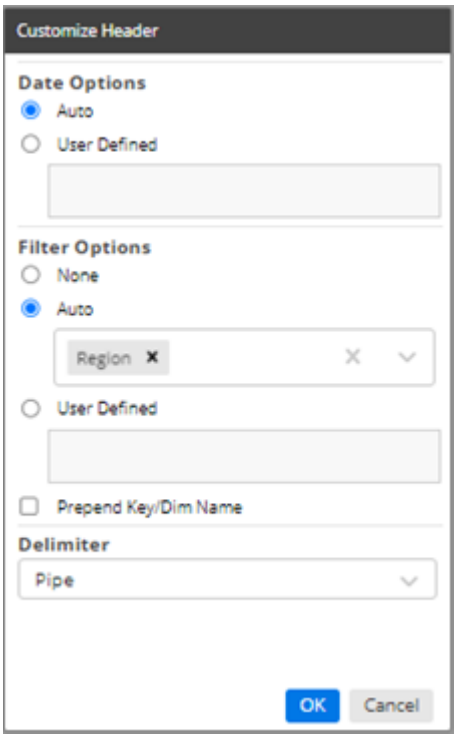


This feature works with password collections to provide automatic comparisons of user-assigned data to benchmarks. For example, how am I doing compared to everyone else? The same dashboard can be used across multiple users with different results depending on user rights. Additional setup is required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

Custom column headers

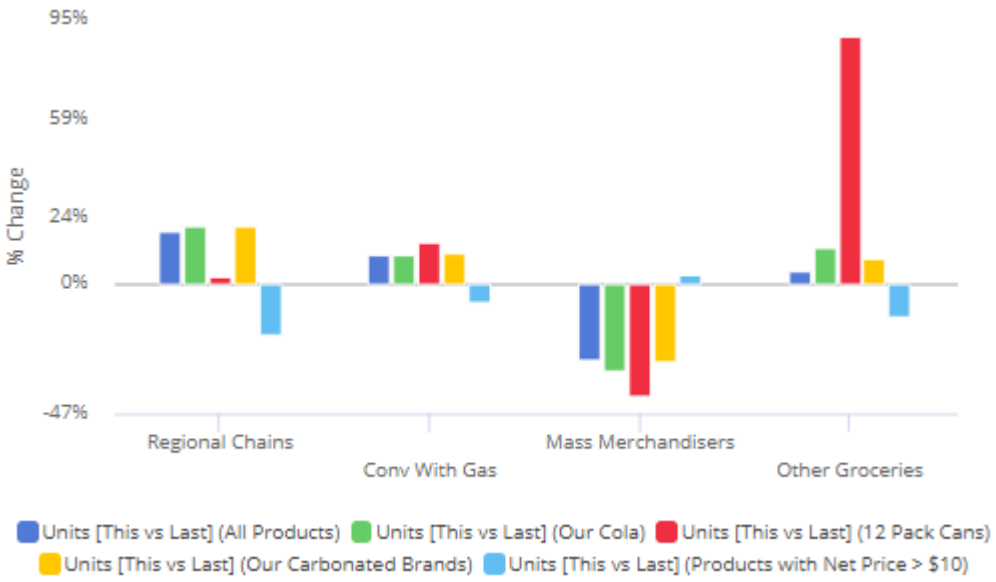
You can customize column headers to help users understand what date ranges and filters they are viewing. "Auto" options are available to automatically update the headings based on the context of the data.

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



Column filtering in graphs

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



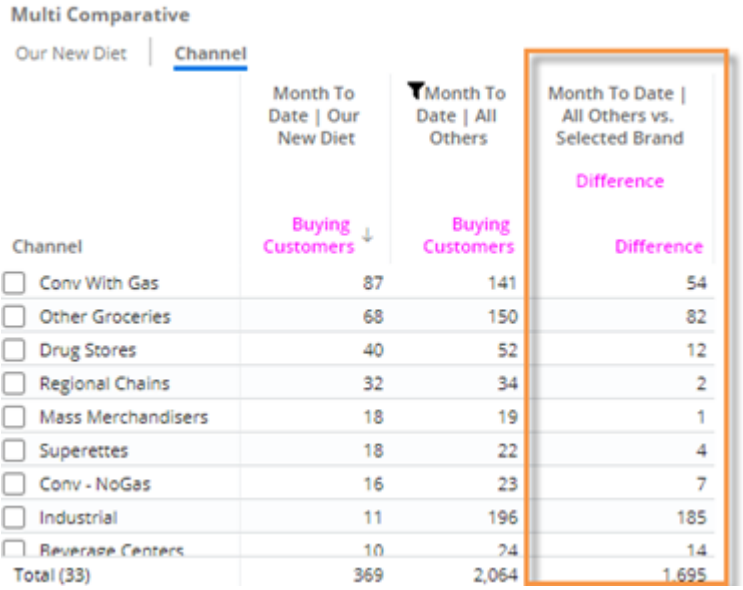
Equivalents by column

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

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

Custom calculations for columns

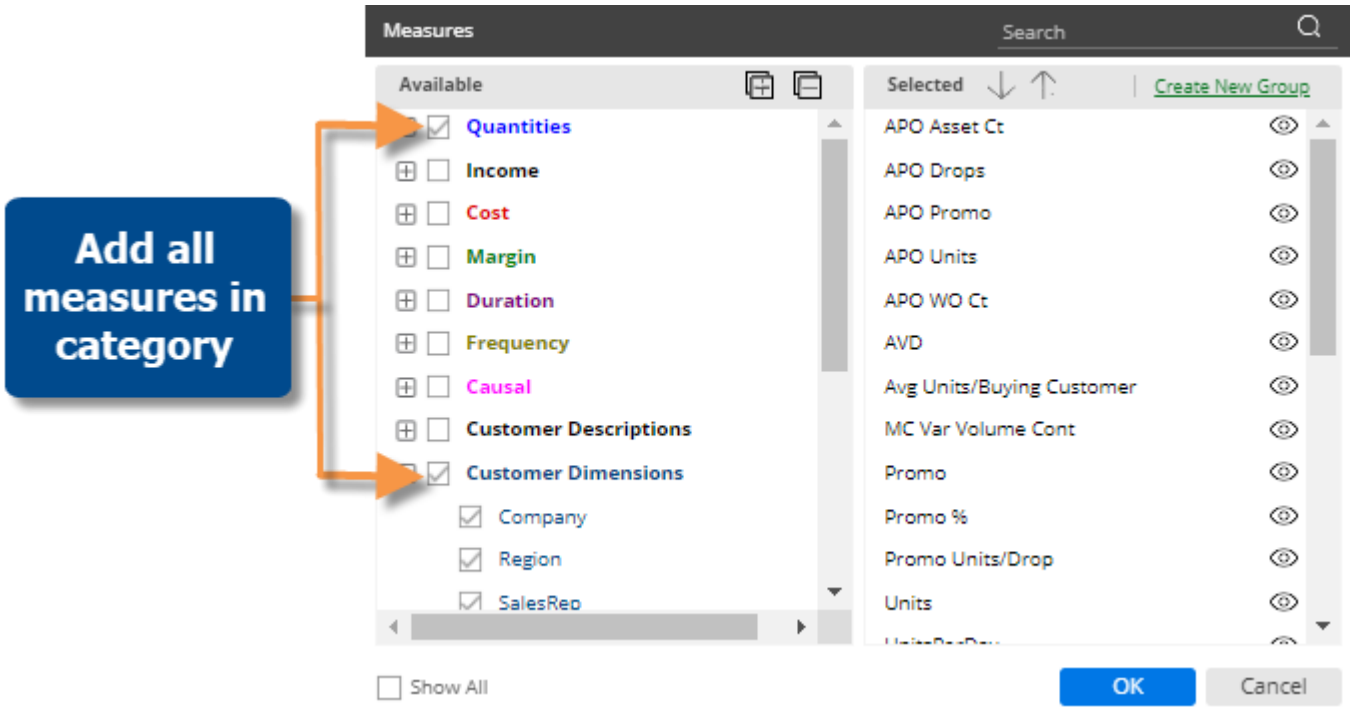
You can apply special calculations based on columns, such as difference in volume for one sales rep compared to another or number of customers buying one package versus all other packages. This feature requires that the dataset has temporal measures (i.e. measures based on specific timeframes) that can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



Improved usability

Shortcut to add all measures

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



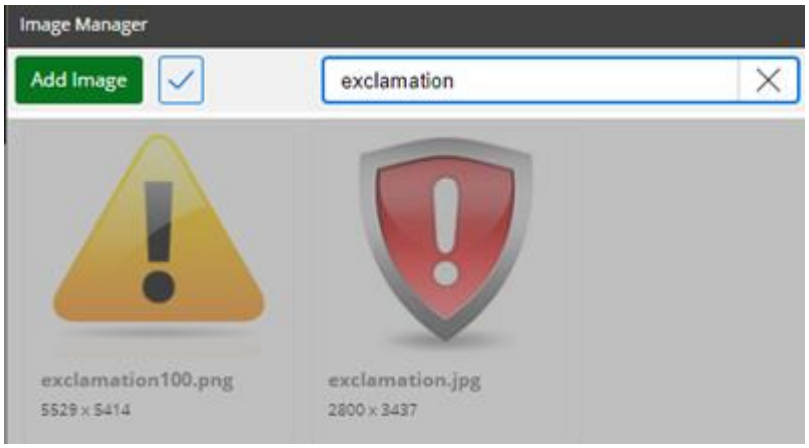
Cross-platform dashboard links

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

Easier image management

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

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



Grid access in custom views

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

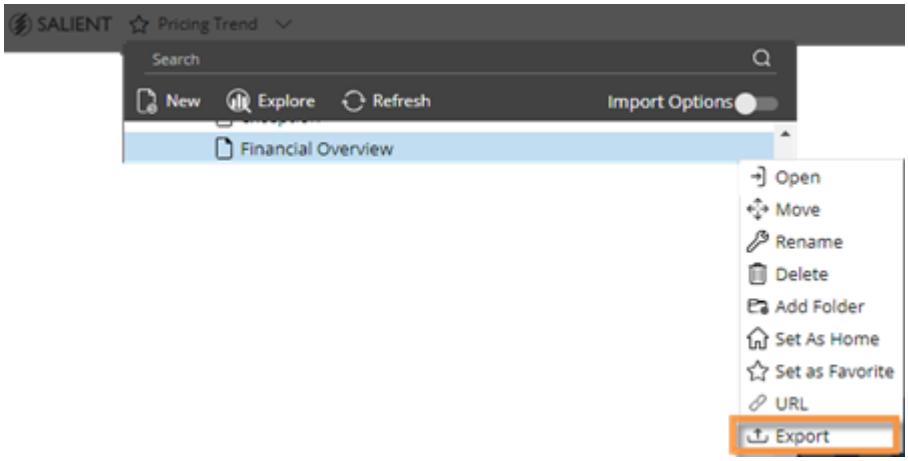
Administrative improvements

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

Version 8.3

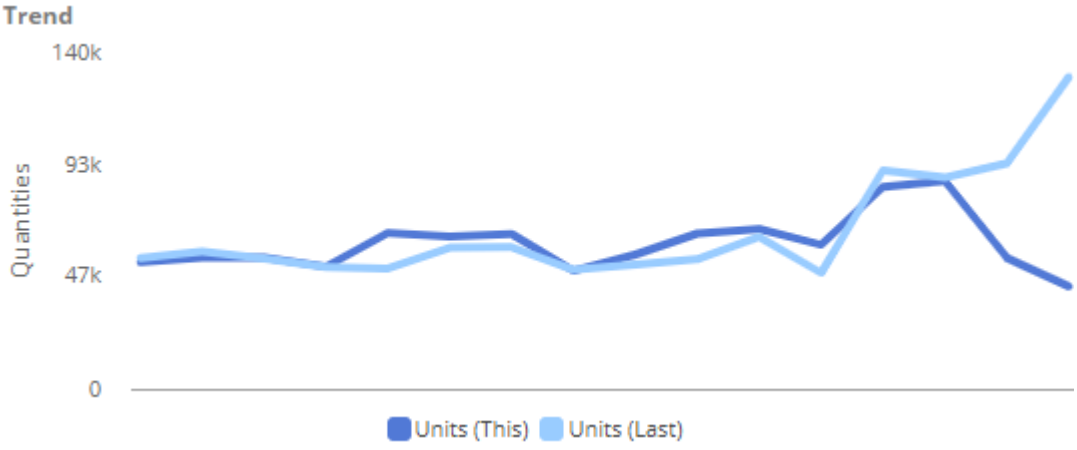
Faster dashboard export (in V8.3.6+)

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



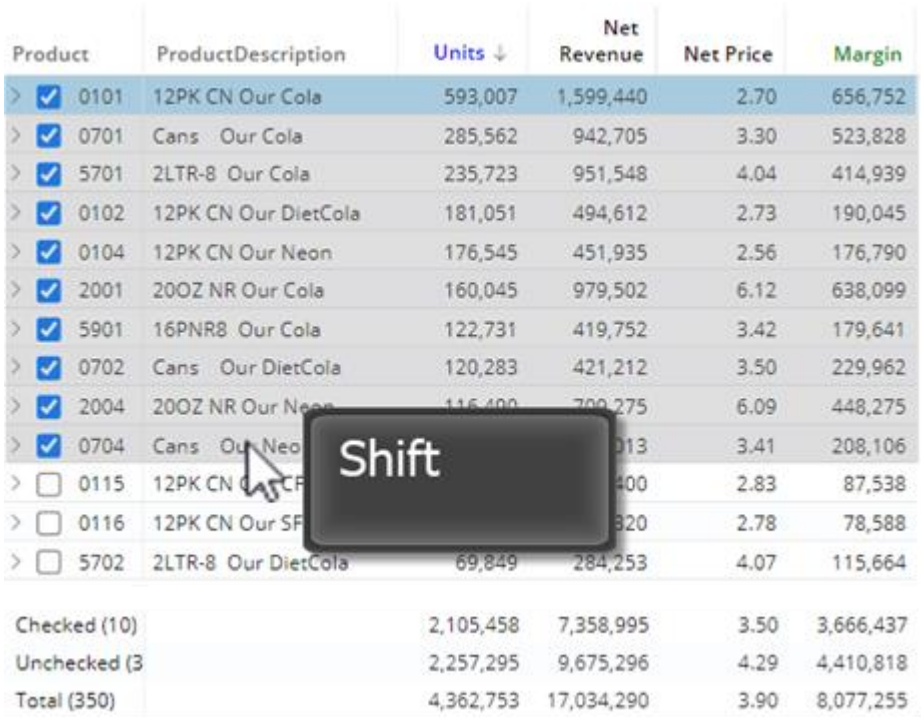
Easier setup for comparative trend graphs (in V8.3.6+)

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



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

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

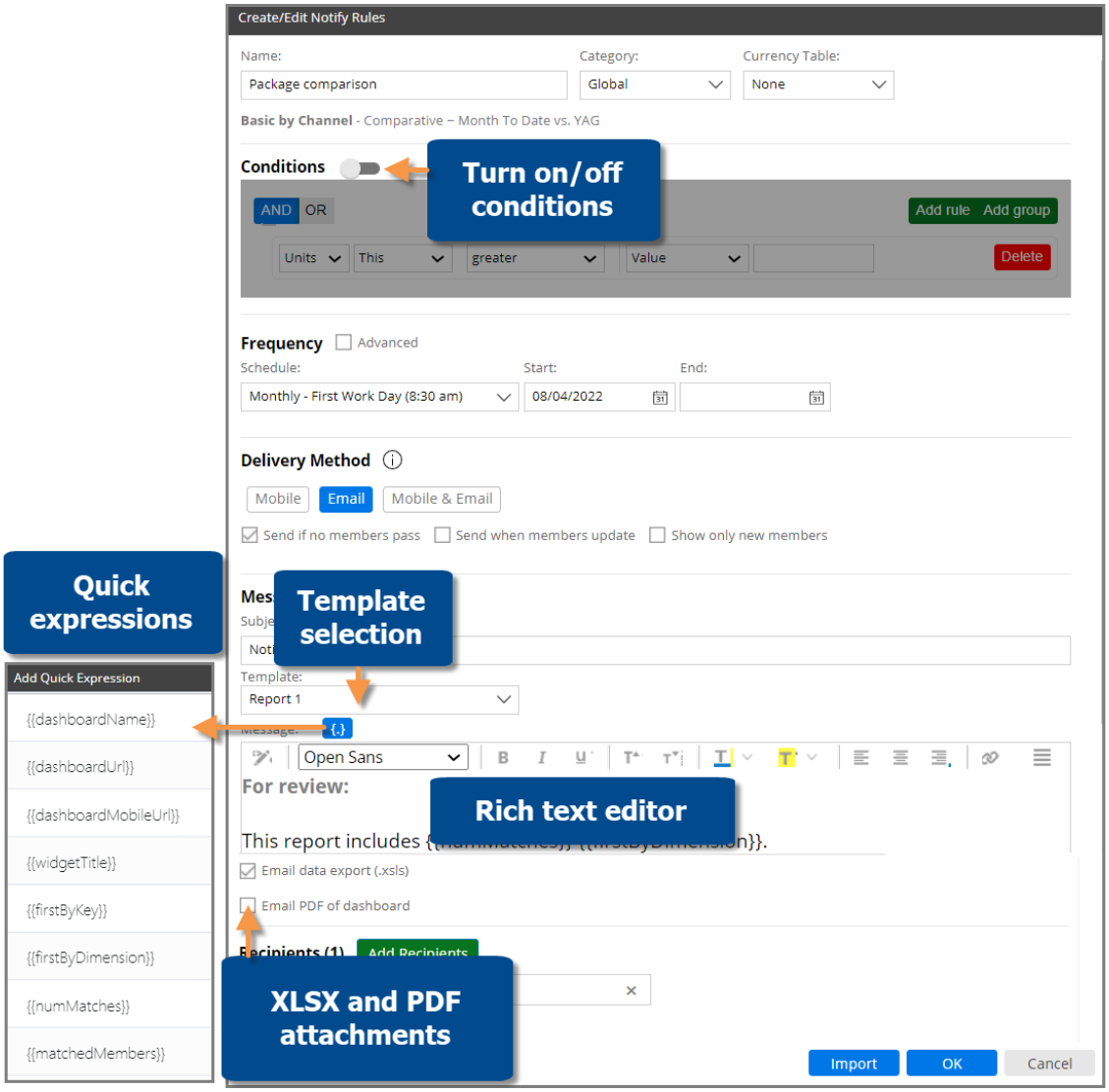


Product	ProductDescription	Units ↓	Net Revenue	Net Price	Margin
0101	12PK CN Our Cola	593,007	1,599,440	2.70	656,752
0701	Cans Our Cola	285,562	942,705	3.30	523,828
5701	2LTR-8 Our Cola	235,723	951,548	4.04	414,939
0102	12PK CN Our DietCola	181,051	494,612	2.73	190,045
0104	12PK CN Our Neon	176,545	451,935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

Comprehensive options for notifications (in V8.3.4+)

Several new options provide a complete solution for automated notifications.

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

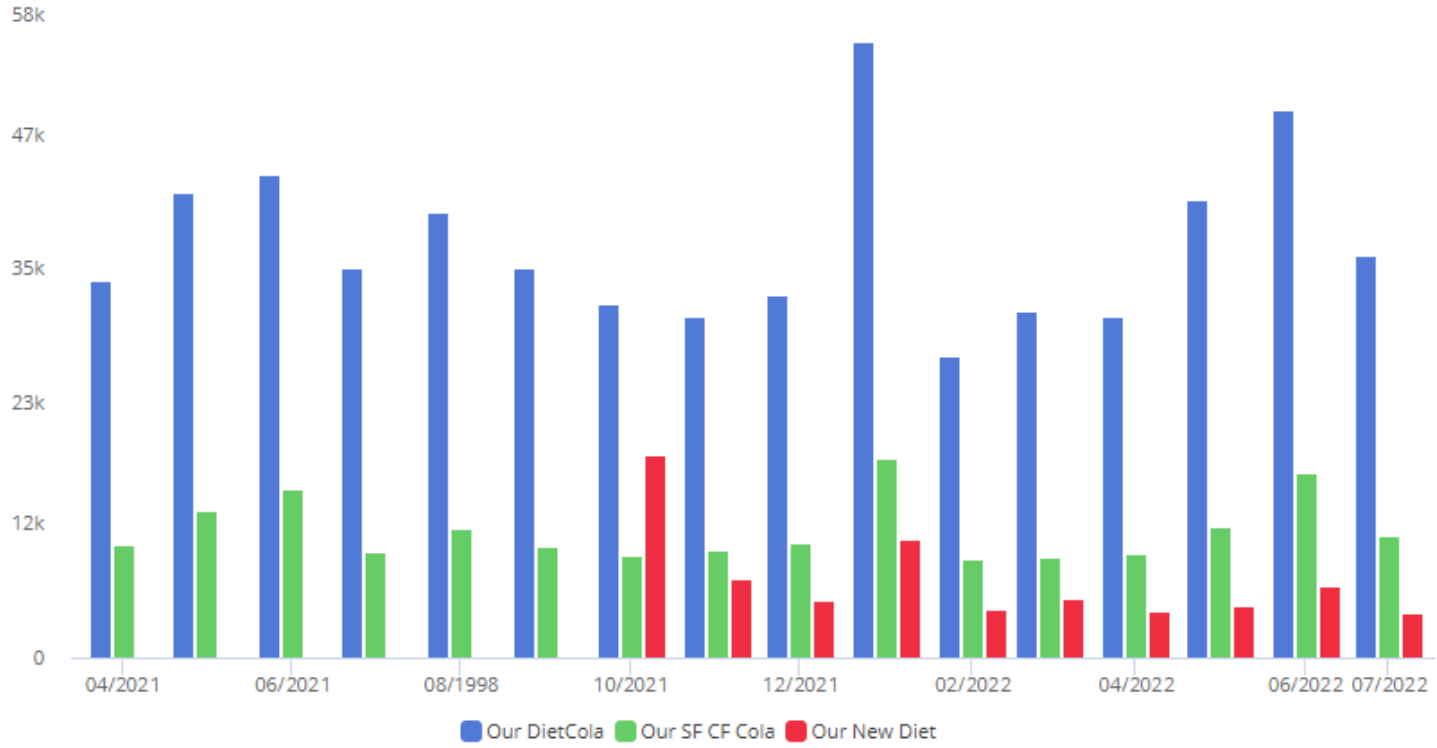

Create/Edit Notify Rules
Name:
Package comparison
Category:
Global
Currency Table:
None
Basic by Channel - Comparative – Month To Date vs. YAG
Conditions
Turn on/off conditions
AND OR
Add rule Add group
Units This greater Value
Delete
Frequency
Advanced
Schedule:
Monthly - First Work Day (8:30 am)
Start:
08/04/2022
End:
Delivery Method
Mobile Email Mobile & Email
Send if no members pass
Send when members update
Show only new members
Quick expressions
Template selection
Add Quick Expression
{{dashboardName}}
{{dashboardUrl}}
{{dashboardMobileUrl}}
{{widgetTitle}}
{{firstByKey}}
{{firstByDimension}}
{{numMatches}}
{{matchedMembers}}
Template:
Report 1
Open Sans
For review:
Rich text editor
This report includes
Email data export (.xsls)
Email PDF of dashboard
Add Recipients
XLSX and PDF attachments
Import
OK
Cancel

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

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

New share trend visualization (in V8.3.4+)

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



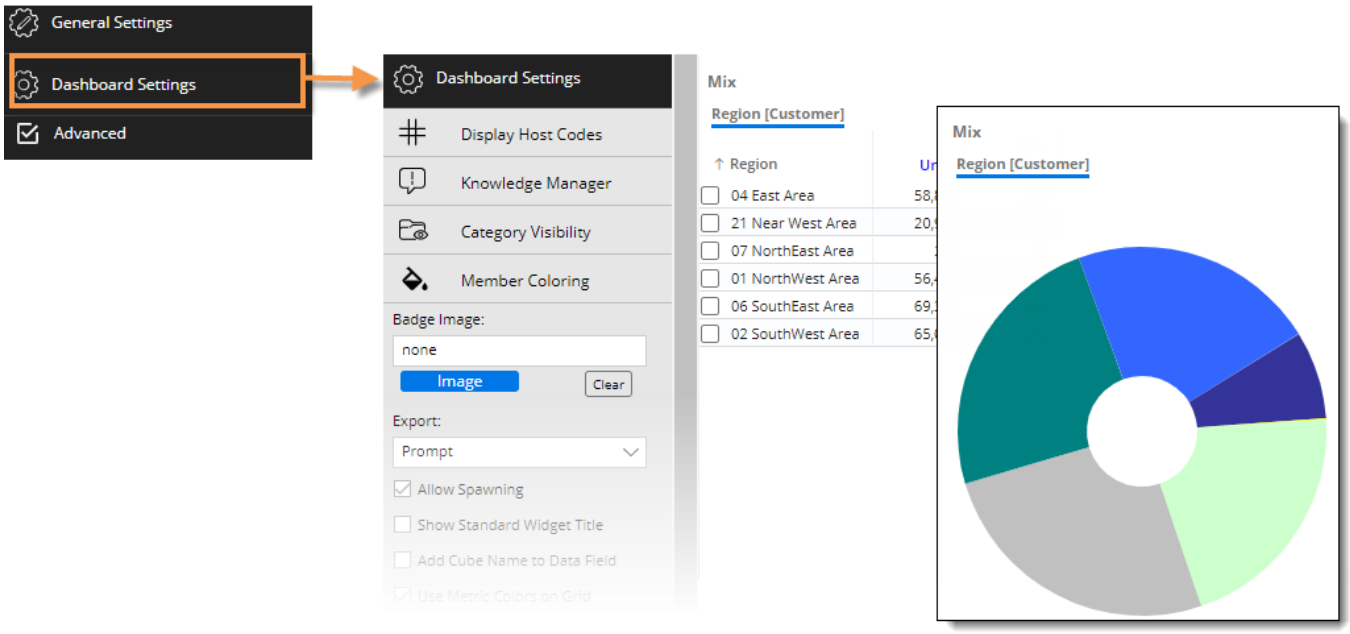
Explore mode enhancements

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

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

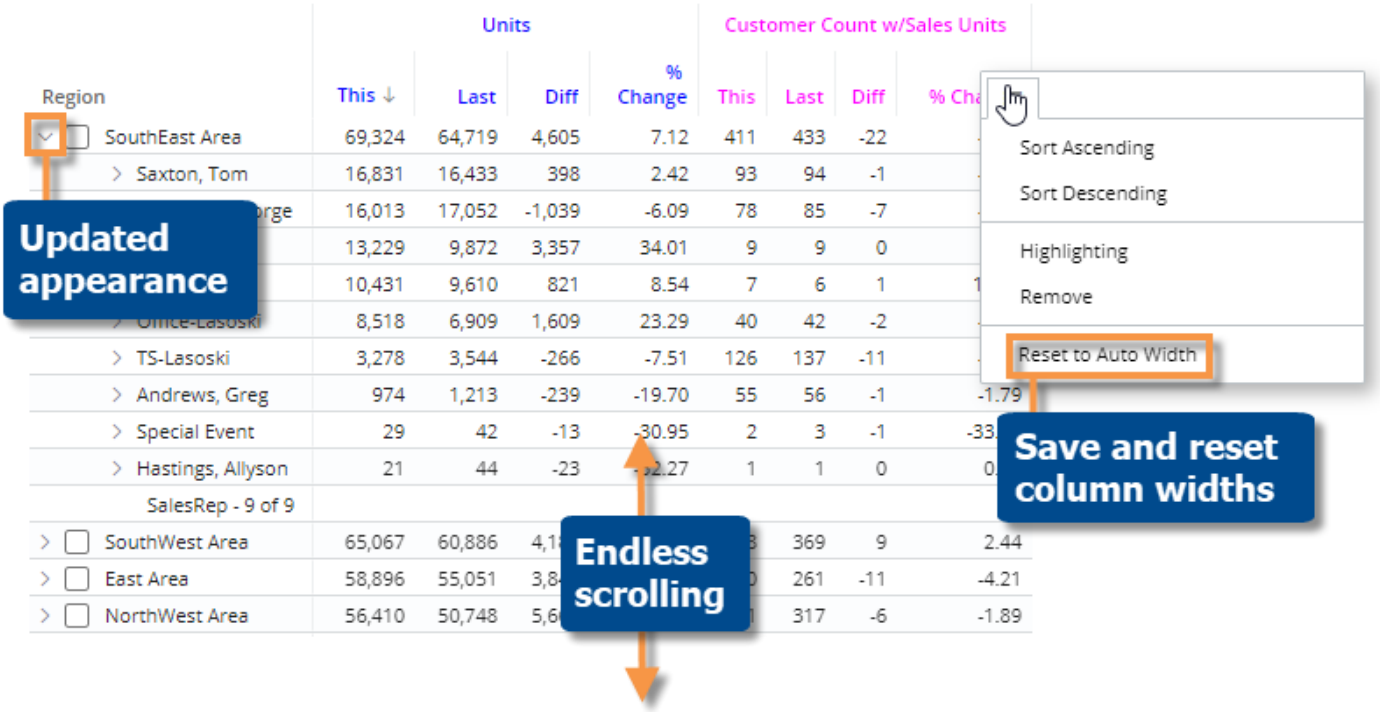
More options while exploring

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



Grid improvements

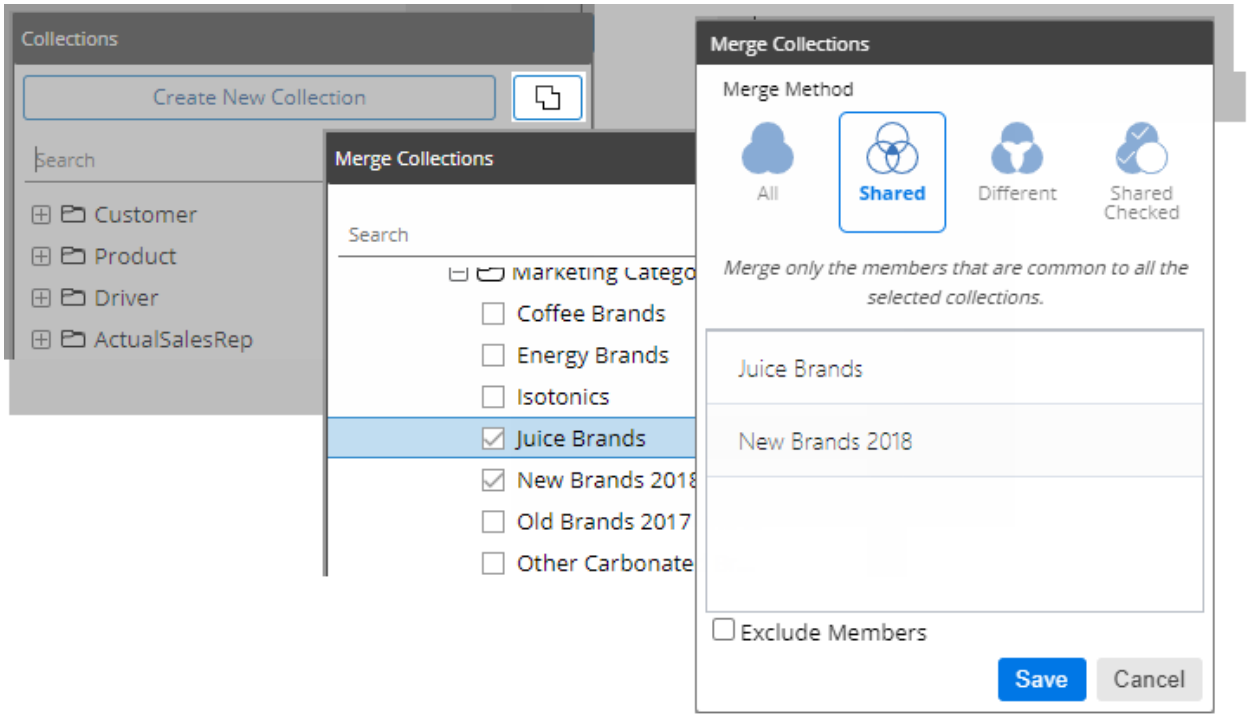
- This version provides better performance in large grids with many columns.
- Grids have an updated appearance. For example, expand multiple levels of data using streamlined arrows instead of plus buttons.
- A new option provides endless scrolling within a single page. When infinite scrolling is on,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



Region	Units This	Units Last	Units Diff	Units % Change	Customer Count w/Sales Units This	Customer Count w/Sales Units Last	Customer Count w/Sales Units Diff	Customer Count w/Sales Units % Cha
SouthEast Area	69,324	64,719	4,605	7.12	411	433	-22	
Saxton, Tom	16,831	16,433	398	2.42	93	94	-1	
rge	16,013	17,052	-1,039	-6.09	78	85	-7	
	13,229	9,872	3,357	34.01	9	9	0	
	10,431	9,610	821	8.54	7	6	1	1
Office-Lasoski	8,518	6,909	1,609	23.29	40	42	-2	
TS-Lasoski	3,278	3,544	-266	-7.51	126	137	-11	
Andrews, Greg	974	1,213	-239	-19.70	55	56	-1	-1.79
Special Event	29	42	-13	-30.95	2	3	-1	-33.
Hastings, Allyson	21	44	-23	-52.27	1	1	0	0.
SalesRep - 9 of 9								
SouthWest Area	65,067	60,886	4,1			369	9	2.44
East Area	58,896	55,051	3,8		0	261	-11	-4.21
NorthWest Area	56,410	50,748	5,6			317	-6	-1.89

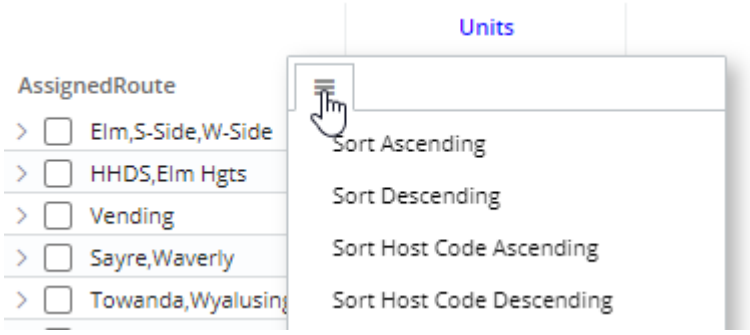
Merge collections

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



Sort by code or name

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



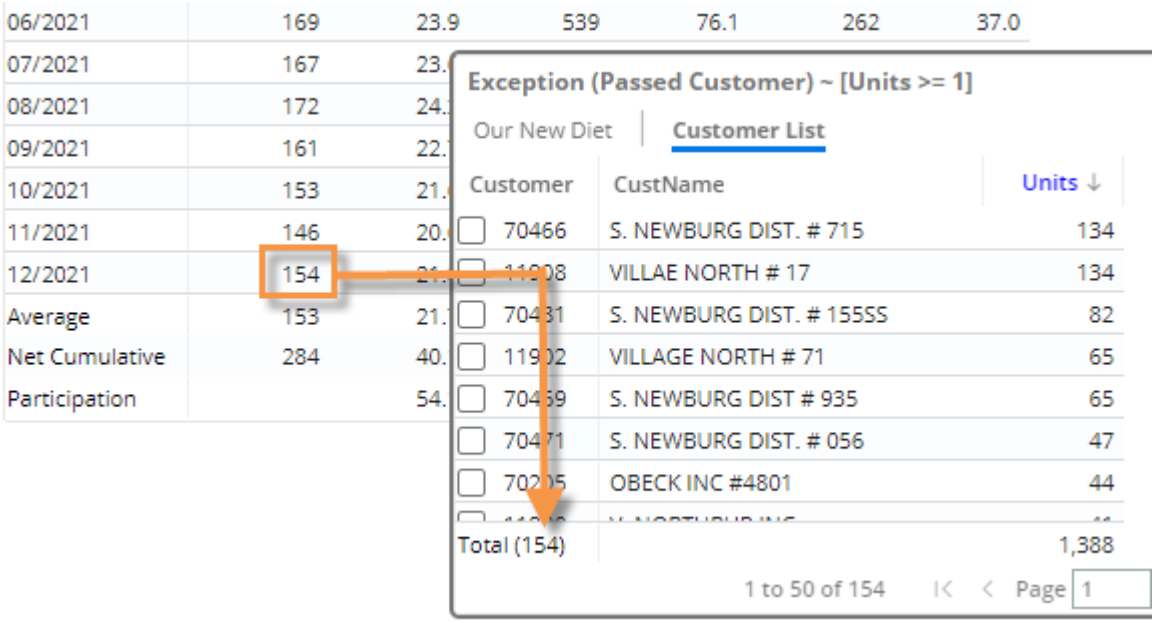
Information about exported files

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

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

Smarter drilling in Exception Time Series grids with dynamic collections

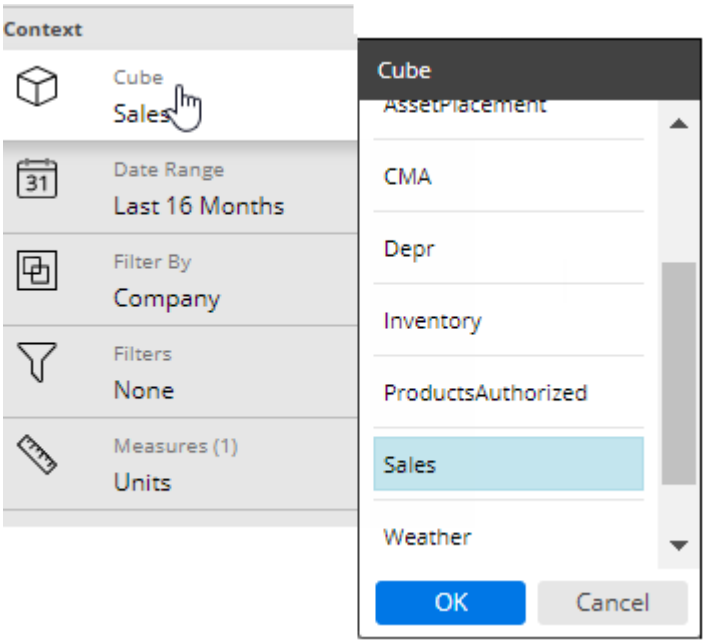
In this version, drilling is more intuitive in Exception Time Series grids with dynamic collection filters. If you drill on passing or failing members for a specific date, the resulting list will use the original grid timeframe (e.g., all twelve months) when determining members that meet the collection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



Improved usability

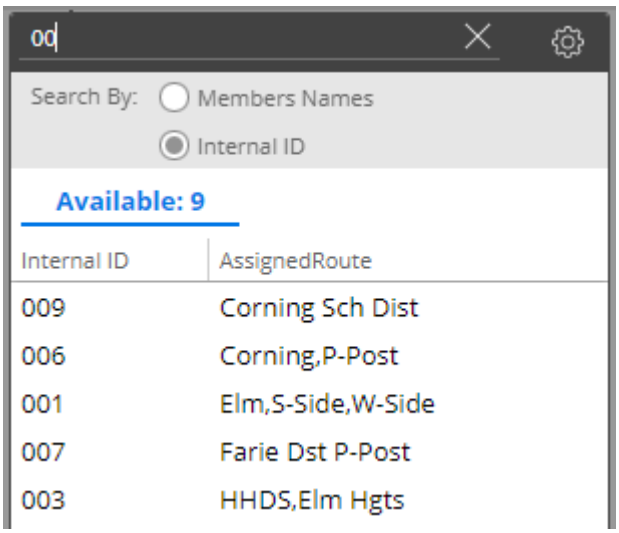
Cube sorting -

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



More information -

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



Security enhancements

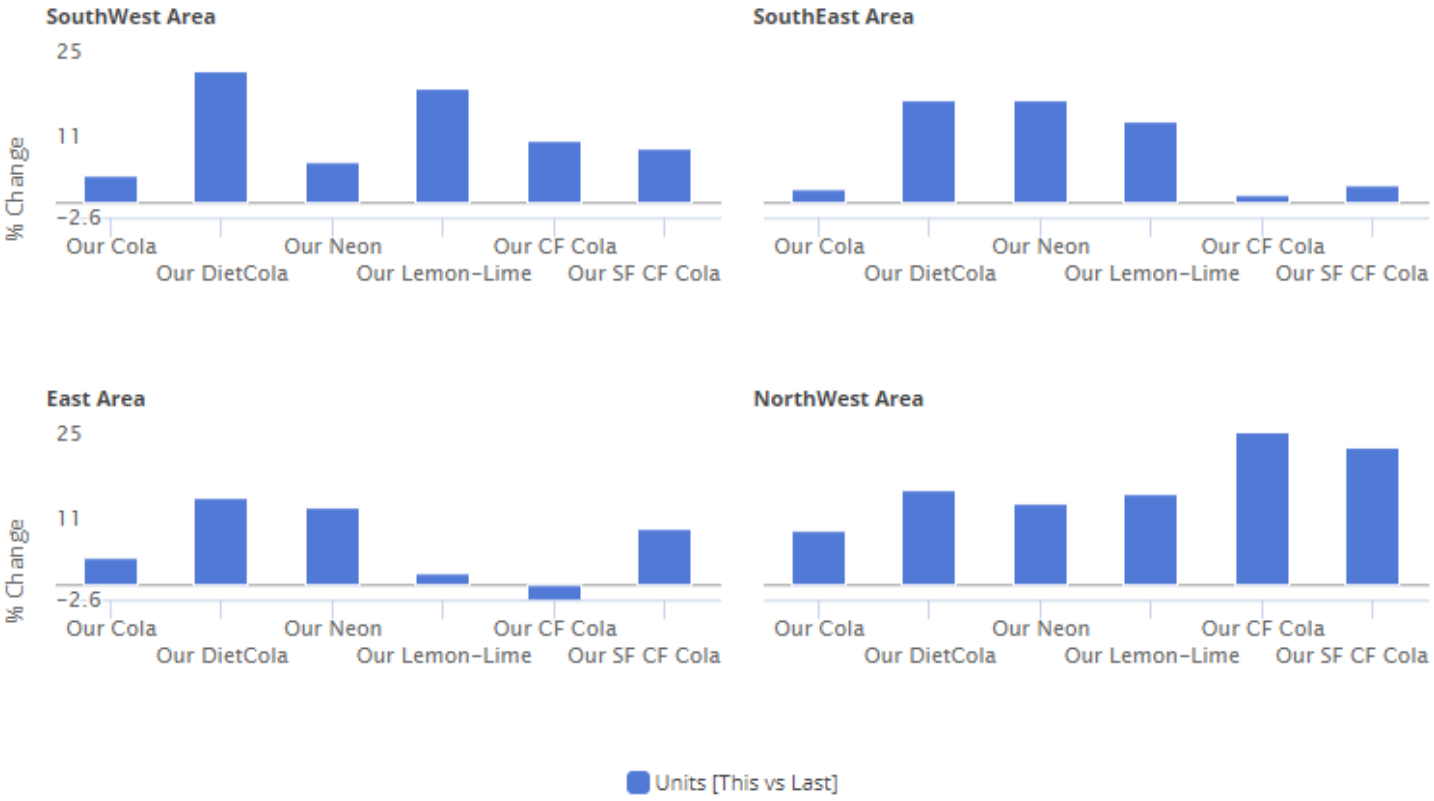
This version improves security by encrypting cookies.

Version 8.2

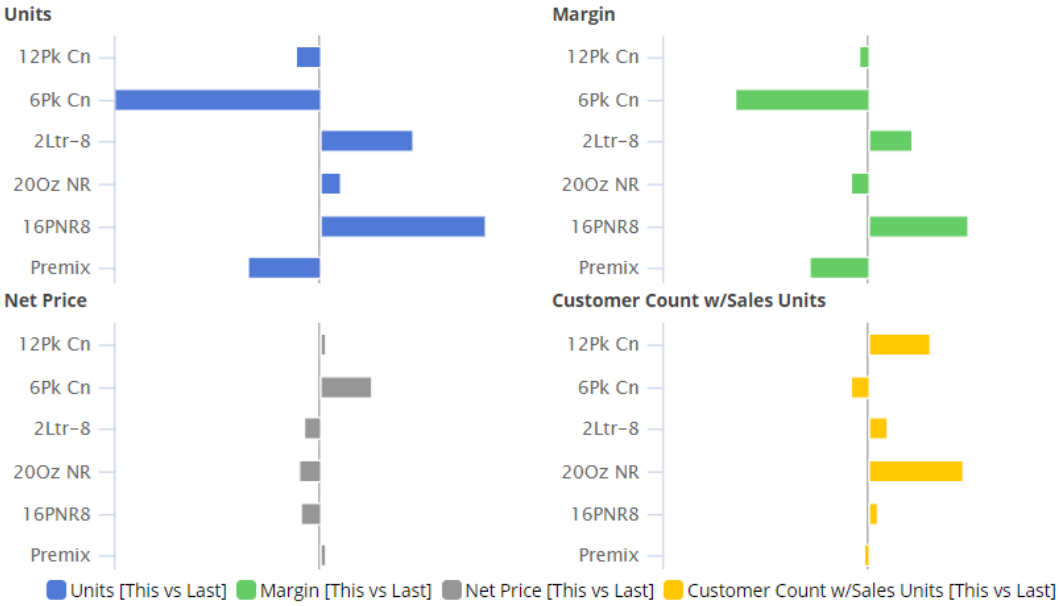
Trellis charts

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

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



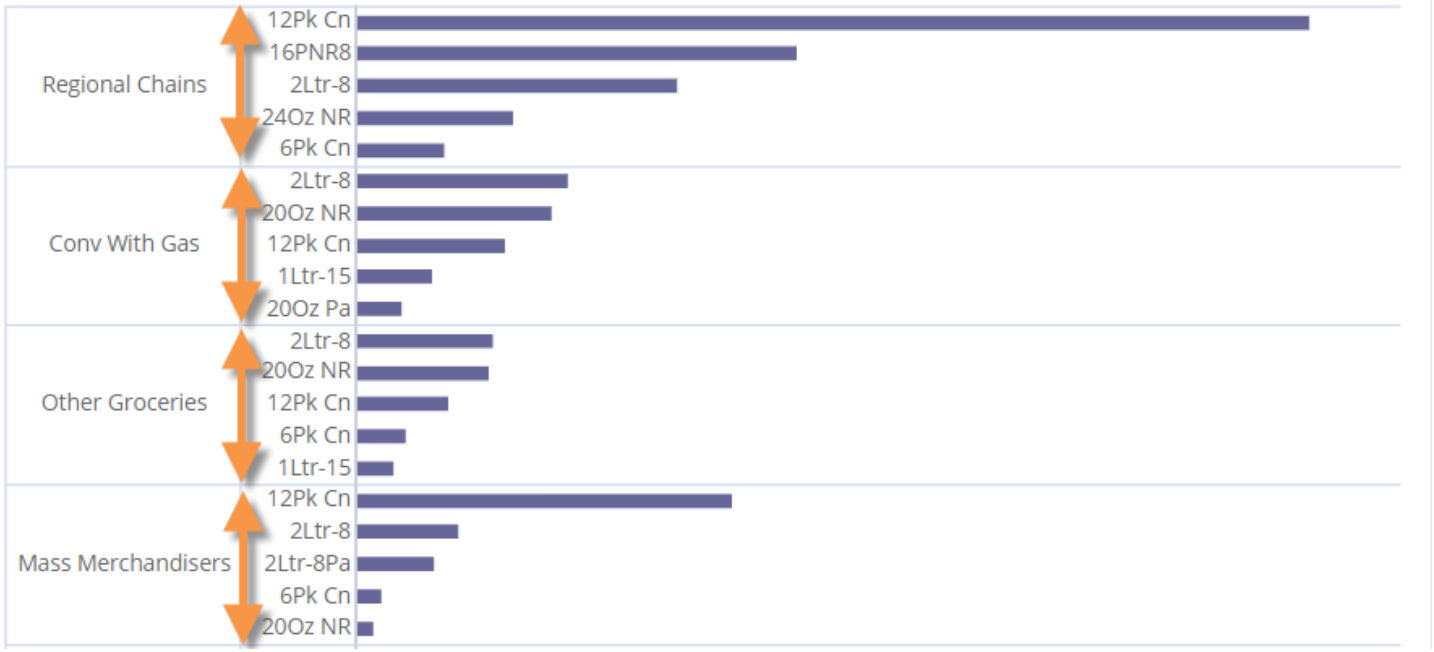
A measure trellis is also available. A measure trellis shows a small graph for each measure, grouping the data at the top level. A measure trellis can help correlate and compare performance metrics.



More options for expanded graphs

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

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



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

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

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

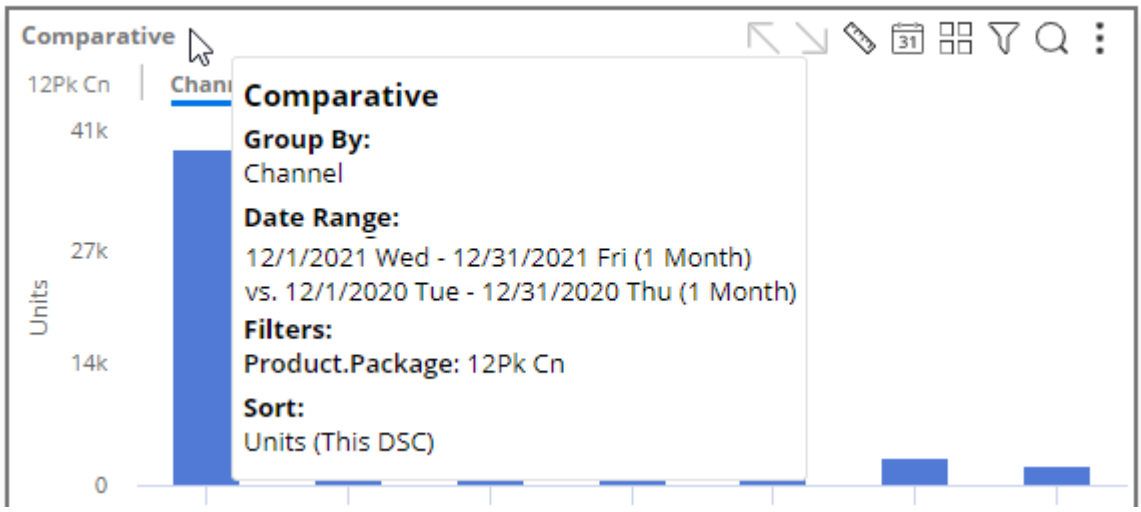
The previous method for defining custom fields is still available. Contact Salient for more information.

Flexible date lookups

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

Better tooltips

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



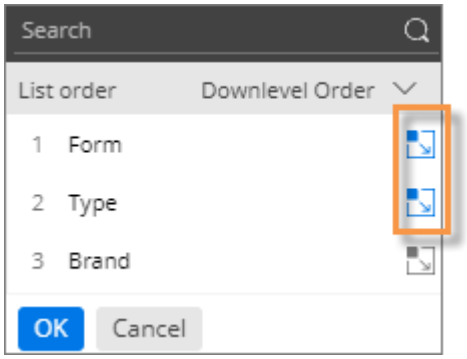
Version 8.0

Improved performance

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

Faster tree expansion

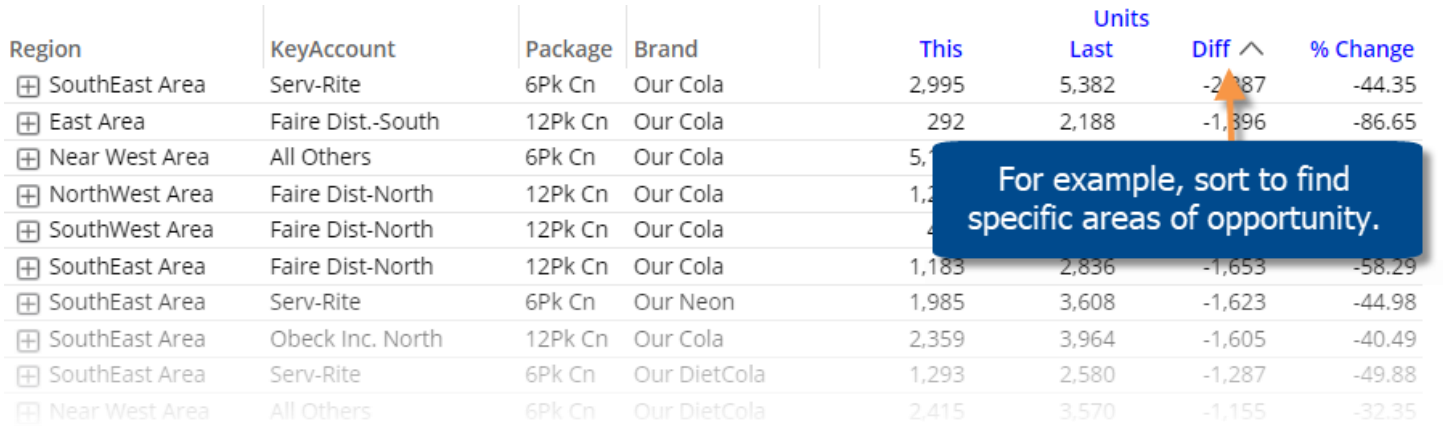
You can automatically expand dimensions and keys to see underlying data. Just turn on auto-expand for a dimension or key; all its members will be expanded to the next level. You can expand multiple levels to create a customized tree of performance metrics.



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

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

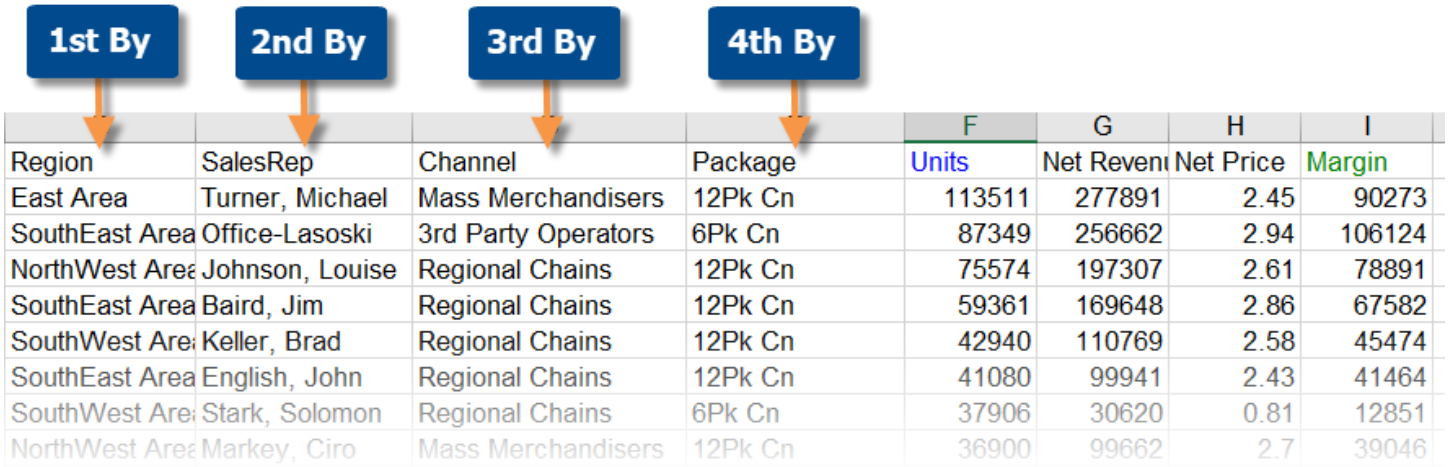
A new multi-dimensional grid expands dimensions and keys into columns to provide an interactive view of performance at any level. Each unique combination has its own row. You can sort the rows to find opportunities and drill down to investigate any cross-sections of data. This new grid is called a "flat"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



Improved exporting

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

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



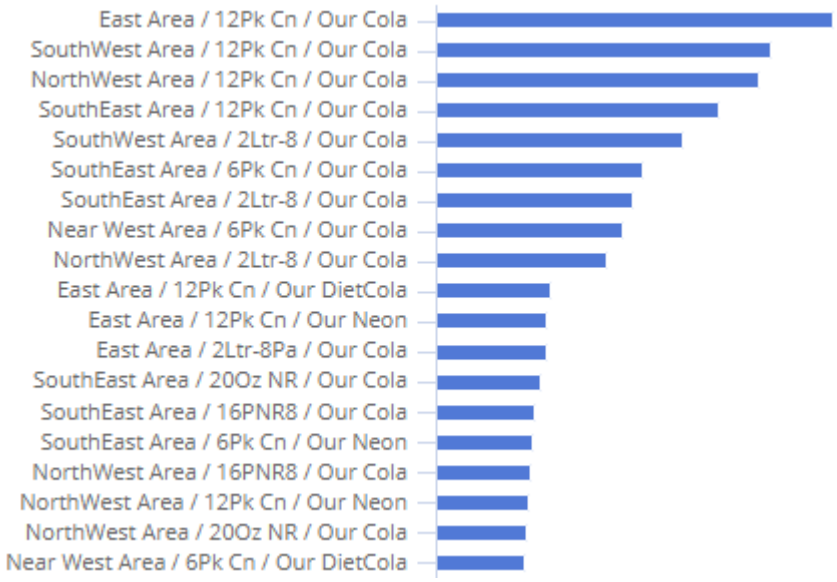
Multi-dimensional visualizations

You can visually compare multiple levels of data in graphs.

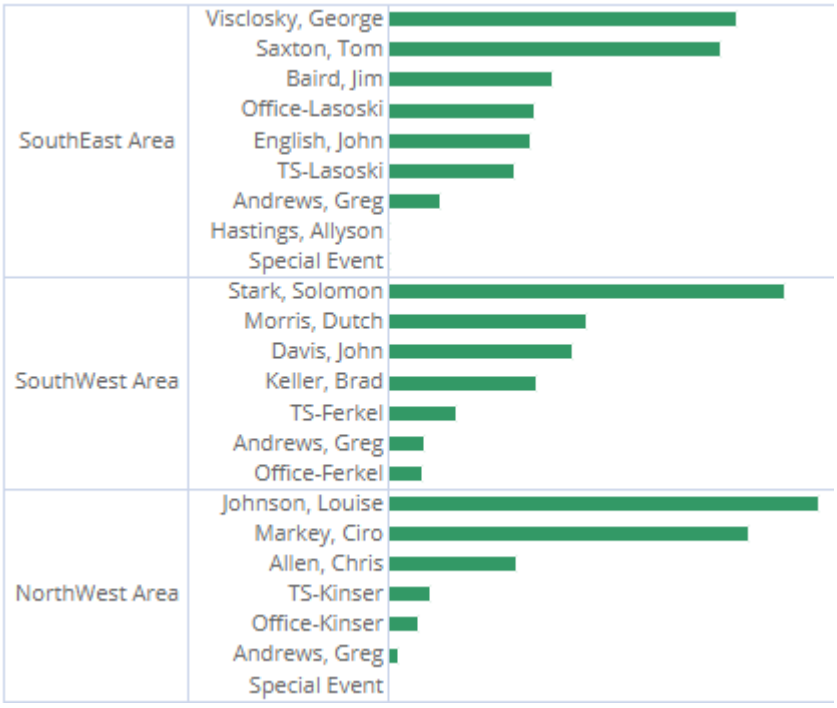
Expanded comparative graphs

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

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



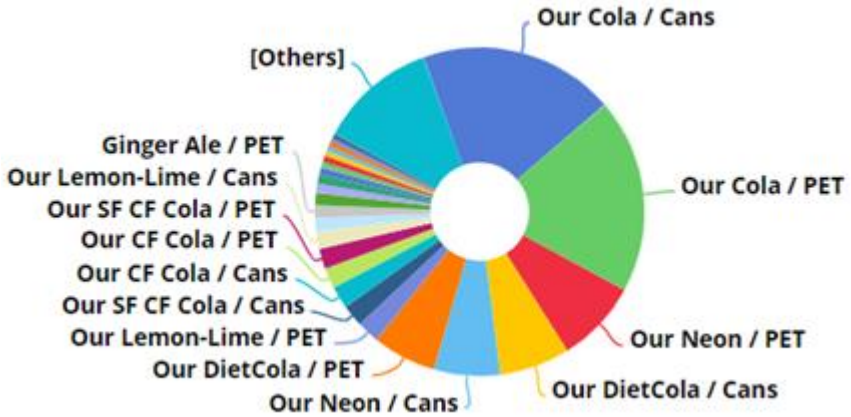
- Grouped bars:
  The graph can group bars under the parent level—allowing you to compare overall results as well as performance within a category. For example, which sales representatives have the highest margins across the company and within their regions?



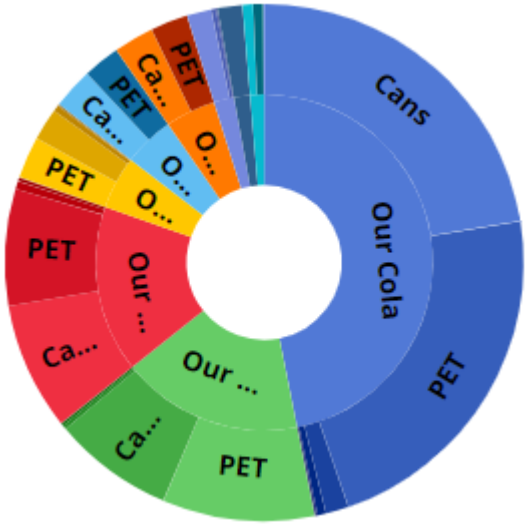
Multi-level pie charts

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

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

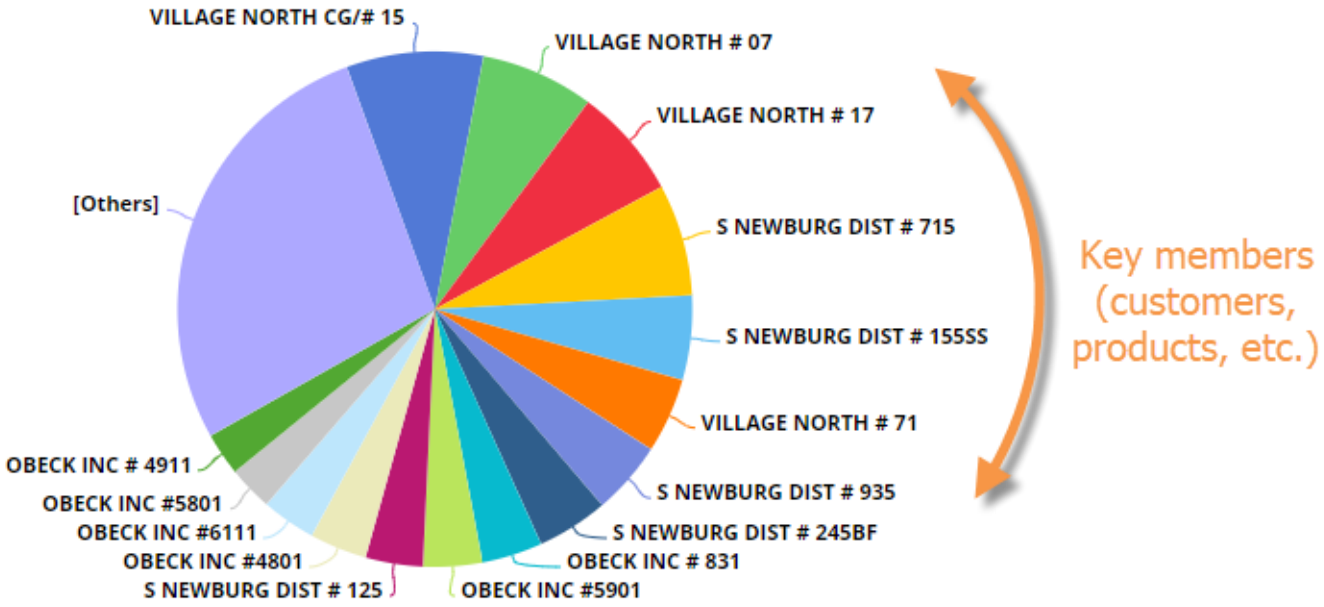


- Sunburst:
  Pie slices can be arranged in a series of rings to show the breakdown of data within multiple categories. The center ring represents the top-level data (1st By); the data becomes more granular as you move outward. For example, visualize the breakdown of package types within brands.



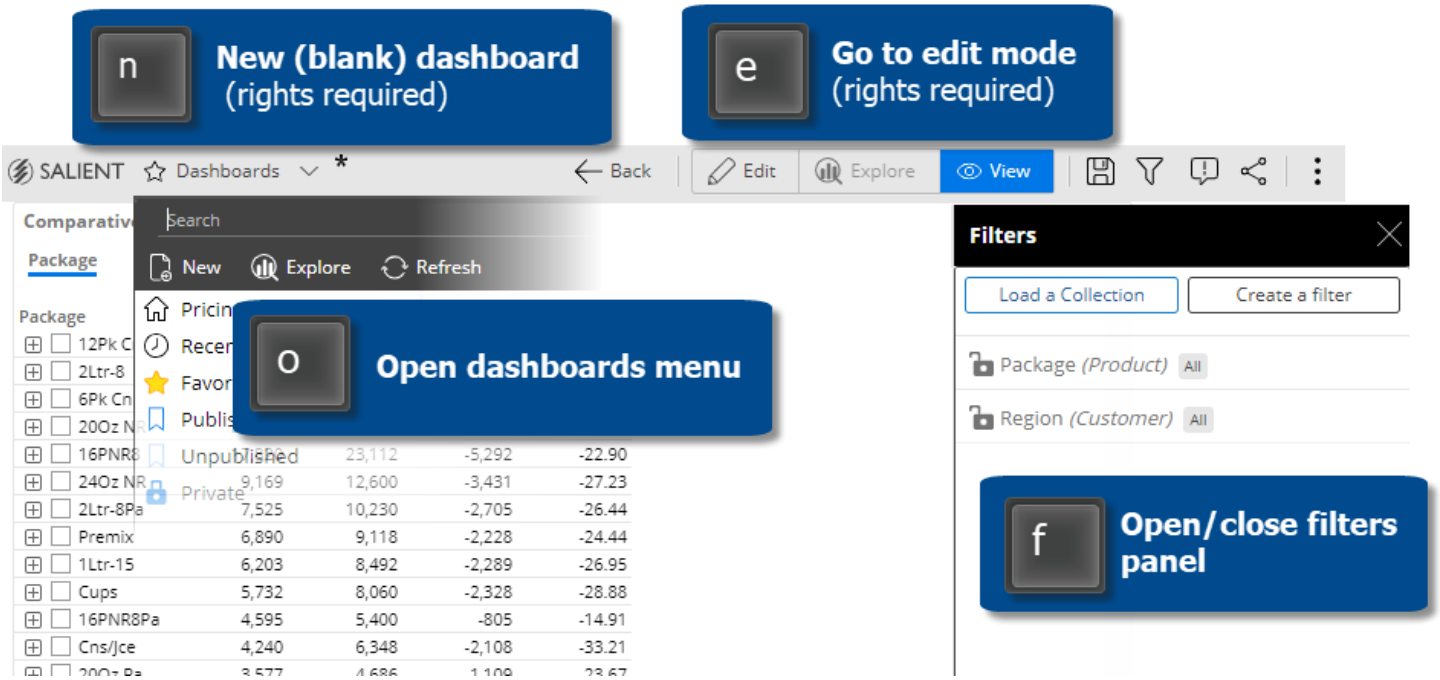
Key-level pie charts

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



Keyboard shortcuts

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

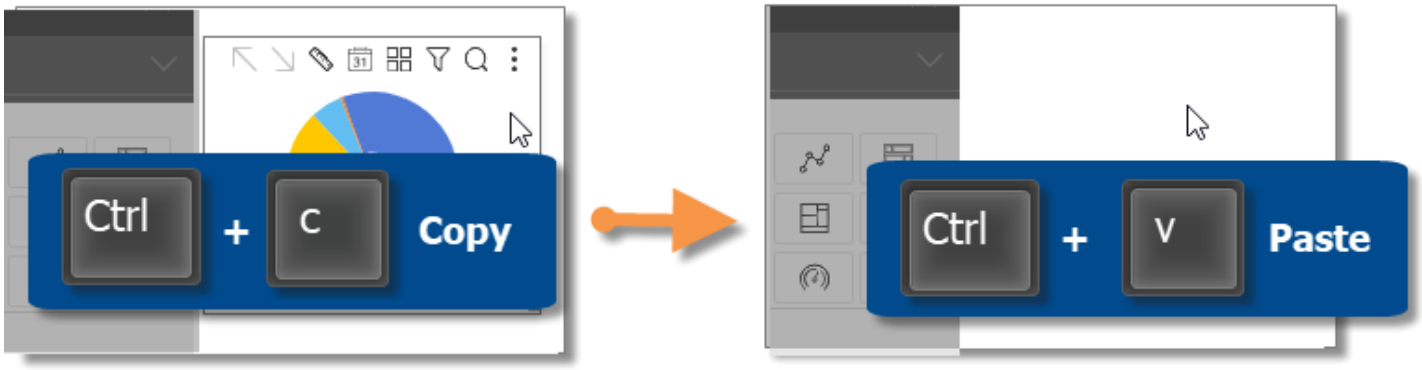


Easier dashboard design

New features make it faster and easier to design dashboards.

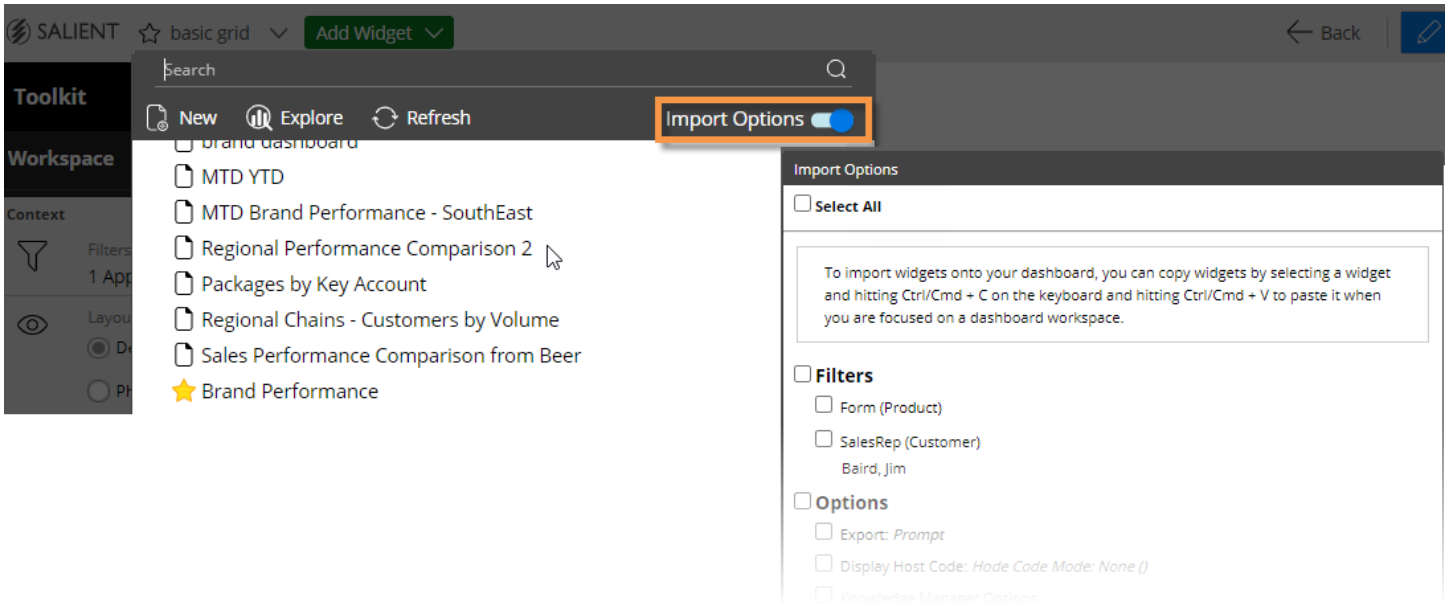
Copy widgets

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



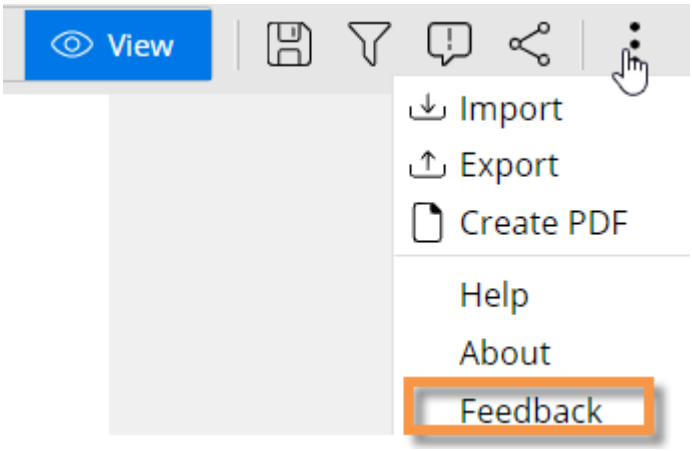
Import dashboard options

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



Contact Salient support

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



For more information

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