Salient Mobile

Setup Guide

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Introduction

Salient Mobile dashboards put critical information at the fingertips of users in a fast and easy-to-use app. Users can select information and view widgets just like in traditional web-based dashboards with the advantage of a simplified view that is touch-enabled and optimized for viewing on mobile devices.

About the solution

The Salient solution was designed to help managers align, measure and improve their organizations. It provides a logical, intuitive interface that enables visibility into performance feedback from daily activities.

How it works

Salient browser-based dashboards and the Salient Mobile app are fully-integrated. In the Salient Dashboards browser-based application, Dashboard Designers can create, design, and publish dashboards using a variety of widgets, filters, and options. The dashboards will then be available in the mobile app, where users can view and interact with the data. Data access and features can be tailored to each user. The end result is a set of custom dashboards that are easily accessible and optimized for any device. An enhanced "explore" mode allows power users to further investigate the data—by changing the analysis type, grouping by any attribute, adding more measures, etc.

Overview of the setup process

Follow the steps outlined in this document to make dashboards available in the mobile app. For more information about building dashboards, see the Salient Dashboards online help or user manual.

1. Build dashboards in "edit mode" (see page 6) of the Salient Dashboards browser application.

2. Set up users (see page 11) by directing them to download and install the Salient mobile app.

3. Perform additional setup tasks as needed (see page 14) (e.g., configure location services).

Version compatibility

The mobile app requires Version 6.20 or higher of the Salient Dashboards web application. To take advantage of recent enhancements, we recommend using the latest version of Salient Dashboards.

Build Dashboards

Dashboards are built using the Salient Dashboards browser-based application in "edit" mode. You can access this application by going to the login page in any supported browser and then going to "edit mode" (additional rights required). You can then build a dashboard by adding widgets, adding measures, selecting Group Bys, filtering, setting the date range, customizing widgets, setting up layouts, and more. Then, save the dashboard to make it available to mobile app users.

Refer to the following tips and the *Salient Dashboards User Manual* for more information.
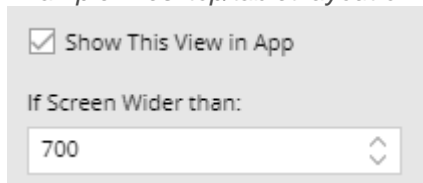
Layout

Depending on the version number of Salient Dashboards, the following methods are available to control a dashboard's layout in the mobile app.

Layouts created in the Salient dashboards browser application

In Salient Dashboards Version 7.80 and higher, Dashboard Designers can design a "phone" layout and "desktop/tablet" layout for each dashboard. Widgets can be positioned differently in phone layouts layouts than in desktop/tablet layouts to optimize screen space. This method provides streamlined dashboard management because both layouts are created within the browser application.

The "Show This View in App" setting must be on to use these layouts in Salient mobile. If both layouts (phone and desktop/tablet) are enabled, the Salient mobile app can automatically switch between these layouts based on screen width.
Example: Desktop/tablet layout on screens over 700 pixels wide; phone layout on screens under 700 pixels wide

This layout type may be longer than the screen, in which case mobile users will be able to pan up and down in the dashboard. If the dashboard's widgets extend to the right side of the screen, mobile users can use "dashboard panning" mode to pan the entire dashboard or turn this mode off to scroll within widgets. If the widgets are narrower than the screen, this mode is not available; however, users can swipe in the blank area to pan or within widgets to scroll.

See the *Salient Dashboards User Manual* or help for more information.

Layout created within the Salient mobile app

In all released versions, users who have the necessary rights can design a layout within the mobile app (see page 20) after the dashboard has been created and saved in the browser-based dashboard applications. In this method, a user can select the number of panes, pick widgets for each pane, and choose other settings in the mobile app itself. If a phone layout or desktop/tablet layout is enabled as previously described, it will override the layout defined in the mobile app.

Default layout

If a dashboard does not have a layout defined in the browser application or mobile app, then the mobile app will show one widget at a time in a single pane. Additional widgets will be available via swipe or scroll.

Show/hide widgets

Dashboard Designers can hide widgets in the mobile app to save screen space. To show or hide widgets in the mobile app, choose from the following options in general widget settings.

| Option	Explanation
Show in Mobile	Leave this option on to show the widget in the mobile app; the widget may be hidden on narrow screens using the Hide For Phone setting (see below). Clear this option to always hide the widget in the mobile app.

Option	Explanation
Hide for Phone **NEW in SDM V8.3.4**	Turn this option on to hide the widget when the phone layout is used (i.e., on narrow screens such as phones) but show it when the desktop/tablet layout is used in the mobile app (e.g., on tablets).

Line, dashboard, and Knowledge Manager widgets will not display in the mobile app; therefore, they do not have these settings. Tab widgets require a phone layout or desktop/tablet layout built in V7.80 or higher to be visible in the mobile app.

Group By

Users will be able to change the Group By the following ways in the mobile app:

- Select from the Group By dimensions that were built into the widget during dashboard creation.
- Tap on ✐ to access all available dimensions.
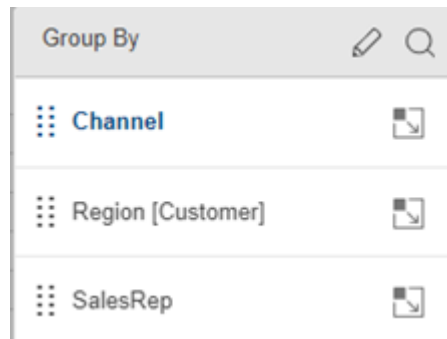
Measure selection

Users will be able to select measures the following ways in the mobile app:

- Show or hide the measures that were built into the widget during dashboard creation.
- Tap on ✐ to access all available measures.

Filter selection

To build filter menus into a dashboard for easy selection in the mobile app, add one or more workspace filters, widget filters, or column filters (for Multi Comparative only). In general, mobile app users will be able to select from these built-in filters. In addition, mobile app users can add their own filters using collections and special features such as saved filter sets and locations. Mobile app users can clear filters (i.e., show data for all) and remove most types of filters (except those that include a filter widget in the original dashboard or collections with visibility set to off). Mobile app users cannot create or apply dynamic filters or benchmarks (all others and cohorts); however, the mobile app can use these types of filters if they are built into the dashboard.

Enabling/disabling mobile app features

Several dashboard and widget settings allow you to restrict the functionality in view mode:

- Dashboard settings - limit measures, Group Bys, and filters in view mode to what is built into the dashboard
- General settings - disable date setup, filters, breadcrumb path, etc.

Saving dashboards

After creating the dashboard, save it to make it available in the mobile app. The available locations depend on your user account settings and control which users will be able to access the dashboard. (Data access may be further restricted based on user account settings.)

- Published - The dashboard will be available globally to all dashboard users.
- Unpublished - The dashboard will be available to Dashboard Designers only.
- Private - The dashboard will only be available to you.

Set Up Users

User accounts

Salient user accounts are set up in the Administrator's Utility for UXT. If dashboard users are already set up, you may not need to make any additions or changes, because dashboard users automatically have login rights for the Salient mobile app. The following account settings affect the specific capabilities that will be available in the mobile app. See the *Salient Dashboards Installation and Configuration Manual* for more information.

- User licensing - Users with Dashboard Designer or Power Viewer licensing have access to view and explore modes in the mobile app. Rights to view and modify global/published components are controlled by additional account settings as explained in the *Salient Dashboards Installation and Configuration Manual*.
- User group - The user must belong to a group with access to dashboards. User groups also control access to save capabilities, Knowledge Manager, privileges for global data, publishing rights, and more. The "publish" right also allows users to modify mobile layouts of published dashboards.
- Features - The feature settings may restrict access to specific analysis types, conversions, and more, in the same way that they control these features in browser-based dashboards.
- Rights - The rights settings can restrict user access to specific parts of the dataset.
- Categories - User data categories let you select which global data categories should be available to the user when accessing and saving dashboards and collections.

Download & login

Once user accounts are set up, you can direct users to download the app and then log in.

User requirements

- The mobile app can be run on any of the following mobile operating systems: Android™ v 5+ ; Apple (iOS9+); Windows 8.1+. Custom views are not supported on Windows.
- Notifications must be allowed to use the Notify feature.

Direct users to download and install the Salient mobile app.

Download the app through the Google, Apple®, or Windows® public app stores.

In the app store, search for "Salient." Once you have located the "Salient" application published by Salient Corporation, follow the prompts to "get" or install the app. You can then open the app and log in as explained below.

Direct users to log in

At a user's first login, the Salient mobile app will prompt the user to enter location of the Salient dashboards web application. As an administrator, you should communicate this location to users. On Android devices, https is required. The user can then select a dataset running at that location.

Users can also select a language at the top of the setup area. The language selection affects labels and menu options but not the dashboards themselves.

The user can then enter a user name and password. Depending on the server setup, the user may enter Salient credentials as defined in the Administrator's Utility or utilize SSO login. See the S*alient Dashboards Installation and Configuration Manual* for more information. In addition, you may be able to pre-configure login settings for mobile users (see page 14).

User access to dashboards

After logging in, users can open dashboards by tapping on them in the home screen. All published dashboards are automatically available in the mobile app.

In addition, you can share a specific dashboard with users by providing its URL. This can be accomplished using the Share button in the mobile app or by creating a dashboard link (see page 23). These capabilities are also available to end users.

User troubleshooting

Users can send log files to Salient support to assist with troubleshooting. To access this function, a user can click the Contact Support link on the login page or the Contact Support button in the mobile app settings area. When prompted, the user must allow Salient to access photos and media to enable this feature. To email via Microsoft Outlook instead of the device's default email app, the Microsoft Office Outlook Desktop Integration app must be installed. On Windows, the support email address may not populate automatically; in this case, the user can manually enter support@salient.com.

Additional Setup

The mobile configuration file

You can create a mobile configuration file to customize branding, configure location services, and choose other settings. The mobile configuration should be a text file with the settings described in this document. For a single dataset or to share settings between multiple datasets, only one mobile configuration file is needed. In this case, the file should be named MobileConfig.json and located in the root dashboards web application folder (e.g., wwwroot/SDM).

If you want to use different settings for multiple datasets, you can create a unique .json file for each dataset. In this case, you must modify the Salient Dashboards sysconfig.xml file to point to the correct mobile configuration file for each server. To make this change, add a configMobileFileName parameter equal to the name of the .json file in the uxtServer section of the sysconfig.xml file. See the following example.

```
<uxtServer host="123.456.789.01" storageHook="123.456.789.01" displayName="MySet1"
 configDSFileName="config.DSN.MySet1.xml" configGUIFileName="config.GUI.MySet1.xml"
 configKMANFileName="kmanConfig.MySet1.xml" configMobileFileName="MobileConfig1.json"
 description="Main dataset" />
```

Custom branding

You can optionally apply a custom color scheme to the mobile app using the following instructions. Custom branding uses an external CSS stylesheet to define the mobile app colors.

1. Modify the mobile configuration file.

You may need to create this file if you haven't already. See the previous topic "The mobile configuration file" for information about the required file name and location and, optionally, how to use different mobile configuration files for different datasets.

Within the mobile configuration file, specify the location and name of the .css file and, optionally, a series of colors to override the default colors used in graphs (pie slices, bars, etc.). You can enter the date or another unique identifier after the .css file path and name to determine when to use the cached version of the .css file or download the .css file.

Example:

```
"cssPath": "css/MobileApp.css?05-17-15",
"chart": {
"seriesColors": ['#003366', '#800000', '#99CCFF', '#9933FF', '#009933', '#FF0000',
 '#FF66FF']
```

2. Create a .css file (e.g., MobileApp.css)

This file defines the specific colors to use for various elements of the mobile app. If you use multiple mobile configuration files, you can also use multiple .css files with different settings for different datasets. We recommend storing the .css file(s) in the SDM/css directory; if the .css file is not located within the dashboard web application directories, then you must enter the full path in the mobile configuration file explained above. The following components can be defined within the .css file.

Main background

(Blue font on white background by default)

.primary-section

.primary-font-color

Headers

.primary-header *(Top toolbar on each page)*

.active *(Active tab text in Fav/Recent)*

.inactive *(Inactive tab text in Fav/Recent)*

.secondary-header *(Messages/Resources header on home page)*

Menus

.salient-menu

.dashboard-menu

.main-menu

Dialogs

.salient-dialog *(Most pop-ups)*

.salient-alert *(Alerts such as "Lost Connection")*

Icons

(Default icon class for icons that don't have a more specialized class. Use fill:#color.)

salient-menu-icon

Sidebars

.salient-sidebar

.kman-sidebar

.filter-sidebar

.sidebar-header

.filters-heading

.knowledge-heading

Location services (nearby locations) setup

Perform the following steps to allow users to find nearby locations defined within the dataset (i.e., location services). For example, users could find nearby customers or assets. The resulting locations will be listed out along with descriptions, dimensions, and data, depending on the configuration settings discussed below. If you perform additional configuration (see Step 5), the mobile app will also display of a map of the nearby locations. The dataset must have a geographic data cube in order to configure and turn on location services.

1. Create a location services dashboard.

The information displayed by each result in the location services panel is based on a designated dashboard.

Create a dashboard with the following elements:

- Add a widget that lists out members of the geo-coded key.
- In the widget, add all of the dimensions and key description fields you want to show in the Location panel. You can format and configure the order of these fields in Step 3.
- Add at least one measure to the widget. The Location panel will show the values and percent change for the first measure listed.
- Turn on highlighting for a measure. The Location panel will show a highlighting indicator based on the first highlighted measure. The first highlighted measure may be the same as the first measure or it may be different.
- Add filters to the dashboard. These filters will be available in the Location panel to allow users to filter their results.

For example:

Company	City	DriverNumber	Region	State
All	All	All	All	All

Comparative
Customer List

	Customer	CustName	CustAddress	CustCity	Sales This	Last	Diff ▾	% Change
☐	02009				2,395	0	2,395 ↑	100.00
☐	02004				370	0	370 ↑	100.00
☐	05002	GROTON HIGH JUICE	PERU ROAD	GROTON	344	0	344 ↑	100.00
☐	00002				210	0	210 ↑	100.00
☐	06002				128	0	128 ↑	100.00
☐	02700				117	0	117 ↑	100.00
☐	02001				108	0	108 ↑	100.00
☐	06300				100	0	100 ↑	100.00
☐	00100	ITHACA AGWAY FEED STORE	120 S FULTONST	ITHACA	79	30	49 ↑	163.33
☐	00000	Internal (For inactive Assets)		ELMIRA	46	0	46 ↑	100.00
☐	09700	SNYDERS	523 E HIGH ST	PAINTED POST	40	0	40 ↑	100.00
☐	03800				31	0	31 ↑	100.00

2. Select the location services dashboard.

After creating the location services dashboard (see step 1), export it to an SDM file.

Select the SDM file as the location services dashboard using one of the following methods.

SDM Admin Portal (V8.4 or higher): Go to System Settings, Default Dashboards. Under Mobile Locations Dashboard, click UPLOAD and navigate to the SDM file. Then, select the SDM file from the menu and save your changes.

Copy file: Manually copy the file to the root dashboards web application folder (e.g., wwwroot/SDM). Then, enter the SDM file name in the mobile configuration file as explained in the next step.

3. Define location service settings in the mobile configuration file.

You may need to create this file if you haven't already. See the topic <u>"The mobile configuration file"</u> (see page 14) for information about the required file name and location. Within this file, add or modify the following section to define the parameters for location services.

Example mobile configuration file (.json):

```
{
"locConfig": {
"geoCubeId":10,
"geoKeyId":0,
"availableDistances": [10, 20, 30, 40, 50, 100, 150, 200, 250, 500, 1000],
"distanceUnit": "miles",
"maxResults": 1000,
"defaultDashboardName":"location dashboard.sdm",
"fieldFormatter": "<h1>{desc1}</h1><h2>Company</h2><p>{dim0}</p><h2>Address</
h2><p>{desc2}</p><h2>City</h2><p>{dim7}</p><h2>State</h2><p>{desc4}</p>"
}
}
```

Parameter	Explanation
geoCubeId	Enter the cube ID of geographic data cube. Refer to the configuration report available through the SIM Support dialog to identify ID numbers for dataset components.
geoKeyId	Enter the ID of the geo-coded key within the geographic data cube.
availableDistances	Enter distances to make available in the Distance drop-down menu.
distanceUnit	Enter the desired unit of distance (either "miles" or "kilometers").
maxResults	Enter the maximum number of results to display at one time.
defaultDashboardName	Enter the name of the default location services dashboard (.sdm file) from which to pull data for the information displayed beside each result . This sdm file may also be selected in the Admin Portal (see Steps 1 and 2).

Parameter	Explanation
fieldFormatter	List the dimensions, key descriptions, and text to display underneath each result (e.g., address, city, state, etc.) enclosed within formatting parameters. Formatting parameters can include styles defined via custom branding. To display a static text label (e.g. "Company"), enter the text itself. To display a key description field (e.g., the specific customer name, address, etc.), enter {desc#} in which # is the number of the description for the geo-coded key based on the order listed in the configuration report where 1 is the first description for the key. For example, in the following configuration report, CustName is {desc1}. To display a dimension field (e.g., a specific company), enter {dim#} in which # is the number of the dimension for the geo-coded key based on the order listed in the configuration report where 0 is the first dimension for the key. For example, in the following configuration report, Company is {dim0}.

Example configuration report used to find ID numbers

```
[ 0 ] 'Customer' ['Customer'] (member count: 6366)
Cube Affinity:
Sales, Depr, WorkOrders, AssetPlacement, CMA, ActiveCust, AR, CoordData
Attributes:
Key Master Fields:9
Host Code Width:5
Host Code Type: Numeric Zero
CustName (30)
CustAddress (28)
CustCity (23)
CustState (2)
CustZip (5)
CustContact (25)
CustPhoneNumber (14)
CustStatus (8)
< 0 > 'Company' ['Company'] (3,3) Len: (15,11)
< 1 > 'Region' ['Region'] (13,13) Len: (16,14)
< 2 > 'Sales Manager' ['Sales Manager'] (6,6) Len: (25,17)
```

Example location results

For example, the fieldFormatting parameter in the previous .json file example would produce the following results:

4. Direct users to turn on location services.

In the Settings area of the mobile app, users should turn on location services.

5. Enable location maps (optional).

You can optionally enable mapping of nearby locations. When this feature is enabled, a map of the nearby locations will display in addition to the location list. This feature requires Salient Dashboards Version 7.0+ and access to a WMS (Web Map Service) server. In addition, you must add the following section to the mobile configuration file (.json). In general, you should modify the wmsUrl property to point to the correct WMS server and can then use the remaining settings shown below.

Example mobile configuration file (.json)

```
"locationMapLayers": [{
"layerType" : "base",
"geoInfo" : {
"wmsUrl" : "https://{geo_server_domain}/geoserver/Basemap/wms",
"parameterInfo" : {
"noWrap": true,
"bounds": [
[-90, -180],
[90, 180]
],
"tiled" : true,
"tilesorigin" : "-180,90",
"version" : "1.1.0",
"srs" : "EPSG:4326",
"format" : "image/png",
"transparent" : true,
"layers" : "Basemap"
}
}
}]
```

Notes:

- locationMapLayers is a root property; it does not go underneath the locConfig property that is used for setting up other location panel settings.
- noWrap and bounds - These are recommended to prevent the world map from repeating if you zoom out. They can be omitted if you want the world map to repeat.
- The settings shown here are recommended. Additional leaflet configuration settings may be used by including them in the geoInfo parameterInfo property.
- The example shown here uses one layer. Multiple layers can be included by defining each one within an opening and closing brace { } and then separating layer definitions with commas.

Total/average setting

The mobile configuration file allows you to specify the following setting in addition to location services and custom branding. You may need to create this file if you haven't already. See the topic "The mobile configuration file" (see page 14) for information about the required file name and location.

```
{
    "alwaysShowGridTotalsAndAverages": true
  }
```

Optionally, set this parameter equal to "true" to always show show total and average rows in applicable widgets in the mobile app, even if these rows are hidden in browser-based dashboards. Omit this parameter or set it to "false" to show or hide totals and averages according to the dashboard's settings.

Pre-configured login settings

Using mobile device management (MDM) software, you can optionally push the following login information to mobile app clients to automatically populate these fields in the login page. Refer to the documentation on the MDM you are using for additional instructions. This feature is currently only available on iOS.

Key	Type	Description
serverUrl	string	URL of the Salient Dashboard web application
serverIndex	int	The index of the dataset you wish to connect to for the configured dashboard server. If you only have one dataset, then the serverIndex should be 0.
username	string	If specified, the username field will be populated with this value.
password	string	If specified, the password field will be populated with this value.
language	string	The mobile app will initially load with the specified language. Supported options include: chinese, english, german, japanese, portuguese, and spanish.

Edit layouts in the Salient mobile app (optional)

If your organization has installed Salient Dashboards Version 7.80 or higher, the following procedure may not be necessary because Dashboard Designers can create mobile layouts in the dashboards browser application.

If you have not upgraded to Salient Dashboards Version 7.80, your organization cannot create mobile layouts in the dashboards browser application; instead, users can create layouts within the mobile app itself as explained below.

If a dashboard does not have either type of layout (designed in browser application or mobile app), the mobile app will display a single pane with additional widgets available via swipe.

To create a layout within the Salient mobile app

This procedure requires the same rights as saving dashboards within a given category (e.g., private or published/global) as explained in the *Salient Dashboards Installation and Configuration Manual.*

In version 7.80 and higher, the edit feature is not available in the mobile app if the dashboard already has a layout defined in Salient Dashboards edit mode (i.e., "Show This View in App" setting is on.)

1. Open the dashboard and tap the edit button.
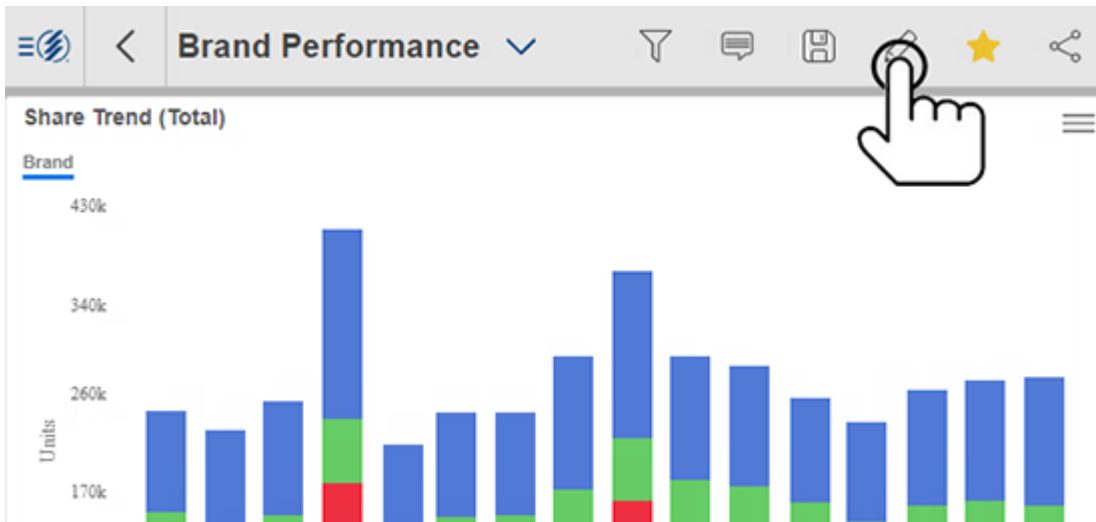

2. Tap on Change Layout to open the wizard.

3. Select layout options in the wizard. When choosing the number of panes, keep in mind that you can show multiple widgets per pane. In this case, users will be able to scroll to the next widget.
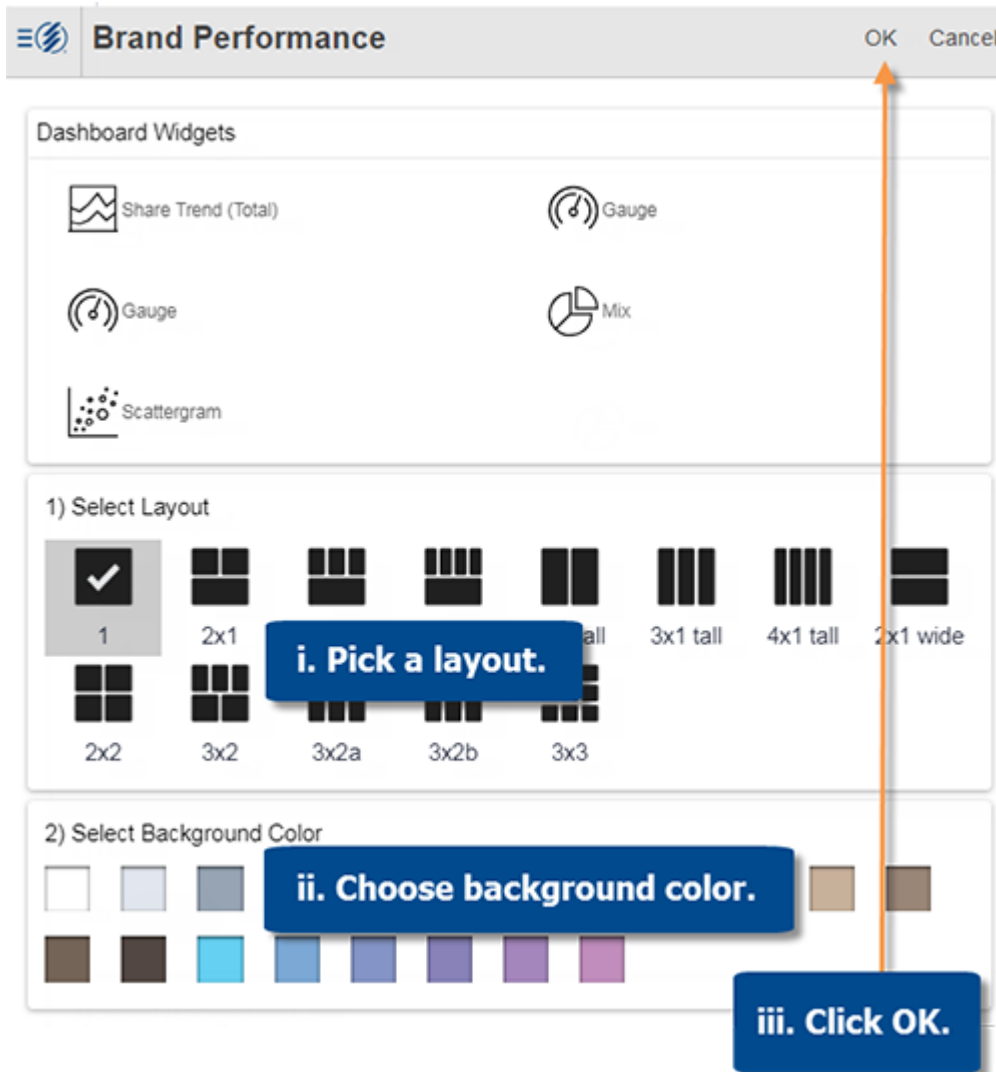
4. Select widgets to show in each pane. Tap a pane; then, select the widget(s) to show. If multiple widgets are selected for a pane, they will be available via swipe. Repeat for each pane; then save.
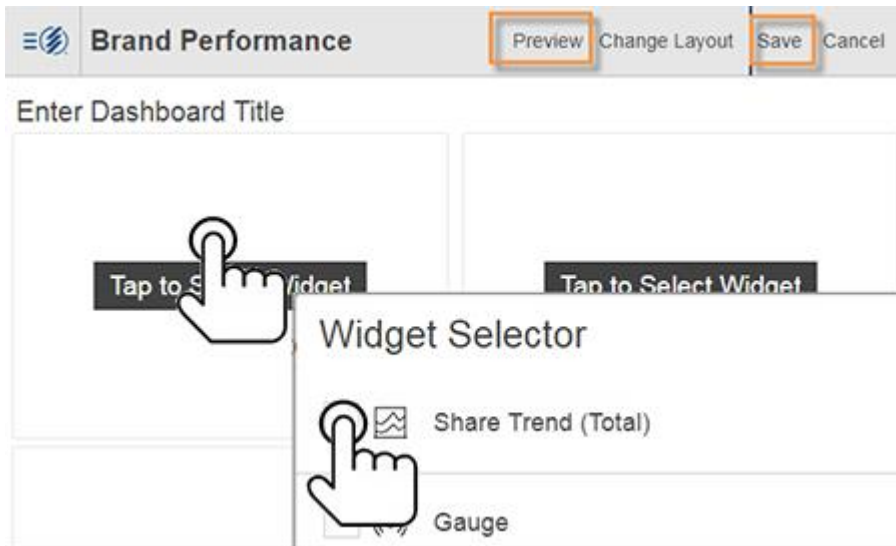
Dashboard links

A dashboard link allows a user to go directly to a dashboard. Dashboard links can be saved for easy access to specific dashboards and shared with users via email, text messages, or other methods. Optional parameters can be included in the link to apply a filter (see page 24) or select a specific location (see page 25) in the location panel.

Standard dashboard links

The URL of a standard dashboard link includes the http:// or https:// prefix. On a mobile device, a user will be prompted to choose the Salient mobile app or a browser when accessing a standard dashboard link. The user can select a preferred method (mobile app or browser) for future dashboard links. To reset the preferred method, clear browser cookies.

To determine the URL for a standard dashboard link, obtain the URL in the Salient Dashboards browser application—either by viewing the URL in the dashboards menu or by sharing a temporary URL. See the Salient Dashboards help or manual for more information.

Mobile dashboard links

The URL of a mobile dashboard link includes the salient:// prefix. This type of link will take the user directly to the dashboard in the mobile app.

To determine the URL for a mobile dashboard link, use one of the following methods:

- Use the Share feature within the mobile app to determine the mobile URL, which can be copied from the resulting email message.
- Determine the standard dashboard URL in the browser-based application; then, replace http:// or http:// with salient://. For https://, you must also append the URL with &secure.

Parameters

If you wish, you can add or modify parameters in a dashboard link (standard or mobile). Replace any spaces with "+" or "%20" (for example, Channel+Comparison). Omitting the dashboard identifier (dashboard or shareddashboard) will go to the home page rather than a specific dashboard.

Parameter	Explanation
ds	This is the name of the dataset. If omitted, the link will attempt to open the most recent dataset accessed by the user.
view	The "view" parameter is ignored by the mobile app.
categoryId	This identifies the category of the dashboard when it is identified by name.
dashboard	This is the name of the dashboard.
shareddashboard	This is a dashboard identifier that is automatically assigned when the dashboard is shared in the mobile app.
filters & filterValues	Refer to "Filters in mobile dashboard links" (see page 24).
locationSelectionHostCode & locationSelectionName	Refer to "Locations in mobile dashboard links" (see page 25).

Basic examples

```
salient://mycompany.com/SDM/SDM.aspx?ds=Bottling&secure
```

This link would open the mobile app to the home page.

```
salient://mycompany.com/SDM/SDM.aspx?ds=Bottling&dashboard=Channel+Overview&secure
```

This link would open the Channel Overview dashboard in the mobile app.

```
https://mycompany.com/SDM/SDM.aspx?ds=Bottling&dashboard=Channel+Overview
```

This link would prompt the user to open the Channel Overview dashboard in either the mobile app or a browser.

Filters in dashboard links

You can add parameters to a dashboard URL to automatically filter the dashboard when it is opened. You can filter by one or more members of one or more dimensions and/or keys. This method of filtering affects all applicable widgets in the dashboard.

To apply a filter via a dashboard URL

Add the following parameters to the end of the dashboard URL.

```
&filters=key.dimension,key.dimension
```

- *key* is the internal name or id of the key associated with the dimension by which you want to filter.
- *dimension* is the internal name or id of the dimension.
- To filter by a key member, list the key rather than the key.dimension name. For example, &filters=Customer would filter on one or more members of the customer key.
- To filter by multiple keys and/or dimensions, include them as a comma-separated list.

```
&filterValues=member_code,member_code|member_code,member_code
```

- *member_code* is the code of the dimension member or key member by which you want to filter data.
- To include data for multiple members of a dimension or key, list the members' codes separated by commas.
- When filtering by multiple dimensions or keys, separate each list with a pipe (|).
- A key code must conform to the exact length and format specified in the dataset; therefore, padding may be necessary. Replace any spaces with "+" or "%20".
- A dim code will be automatically padded on the right side if the code does not match the required length. Additional spaces are not necessary in this situation.

Examples

```
https://mycompany.com/SDM/SDM.aspx?dashboard=MTD+vs+YAG&categoryId=0&filters=Customer
 &filterValues=11901
```

The resulting dashboard would be filtered by customer 11901.

```
https://mycompany.com/SDM/SDM.aspx?dashboard=MTD+vs+YAG&categoryId=0&filters=Customer
 .Region
  &filterValues=01
```

The resulting dashboard would be filtered by customer region 01.

```
salient://mycompany.com/SDM/SDM.aspx?dashboard=MTD+vs+YAG&categoryId=0&filters=Custom
 er
  &filterValues=11901,11227,11391&secure
```

The resulting dashboard would be filtered by customers 11901, 11227, and 11391.

```
salient://mycompany.com/SDM/SDM.aspx?dashboard=MTD+vs+YAG&categoryId=0
  &filters=Customer.Region,Customer.Channel&filterValues=01|20&secure
```

The resulting dashboard would be filtered by customer regions 01 and also by customer channel 20.

Locations in dashboard links

You can include a location parameter in a dashboard URL to automatically select a member as a location. This results in the following:

- The location button at the top of screen shows the name or code of the member.
- The member is selected at the top of the location panel when opened.
- If you switch to a map, the selected member is represented by a red icon.
- All dashboards filter data by the selected member until the user de-selects it.

To select a location via a dashboard URL

Add the following parameters to the end of the dashboard URL. Replace any spaces with "+" or "%20" (for example, X+Marts).

```
&locationSelectionHostCode=member_code
```

- *member_code* is the host code of the key member you want to select as a location.
- A key code must conform to the exact length and format specified in the dataset; therefore, padding may be necessary.

```
&locationSelectionName=display_name
```

- *display_name* is a name to display in the location button and panel.
- This parameter is optional. If omitted, the location button and panel will display the host code.

Examples

```
salient://mycompany.com/SDM/SDM.aspx?ds=Bottling&locationSelectionHostCode=11598&secu
re
```

This link would open the mobile app to the home page with customer 11598 pre-selected in the location panel. The location panel and button would display the host code "11598."

```
salient://mycompany.com/SDM/SDM.aspx?ds=Bottling&locationSelectionHostCode=11598&loca
tionSelectionName=X+Marts&secure
```

This link would open the mobile app to the home page with customer 11598 pre-selected in the location panel. The location panel and button would display "X Marts" instead of the host code.

```
salient://mycompany.com/SDM/SDM.aspx?ds=Bottling&dashboard=Channel+Overview&locationS
electionHostCode=11598&secure
```

This link would open the Channel Overview dashboard in the mobile app. Customer 11598 would be pre-selected as a location; therefore, the dashboard (and all other dashboards) would filter out data for all other customers.

Notify

Salient Dashboards can send automated notifications to mobile users based on dashboard data and custom business criteria. Notifications are interactive; users can click on the notification to open a dashboard showing the underlying data.

The Notify feature requires additional installation and configuration as explained in the *Salient Dashboards Installation and Configuration Manual.* Once the Notify feature is configured, Salient Dashboard users can set up notification rules and messages in the browser-based dashboards application. (Refer to the Salient Dashboards help for information.) Notifications are then automatically pushed to mobile devices and/or emailed when data meets the criteria. Salient mobile app users must allow notifications to use this feature.