

Working with Go To Stratum

Version 1



Explore Go To Stratum

Topics in this user guide tell you about Go To Stratum features and give you practical examples of using the Go To Stratum visual with Power BI.

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- [Fields & Format Settings For Go To Stratum](#)

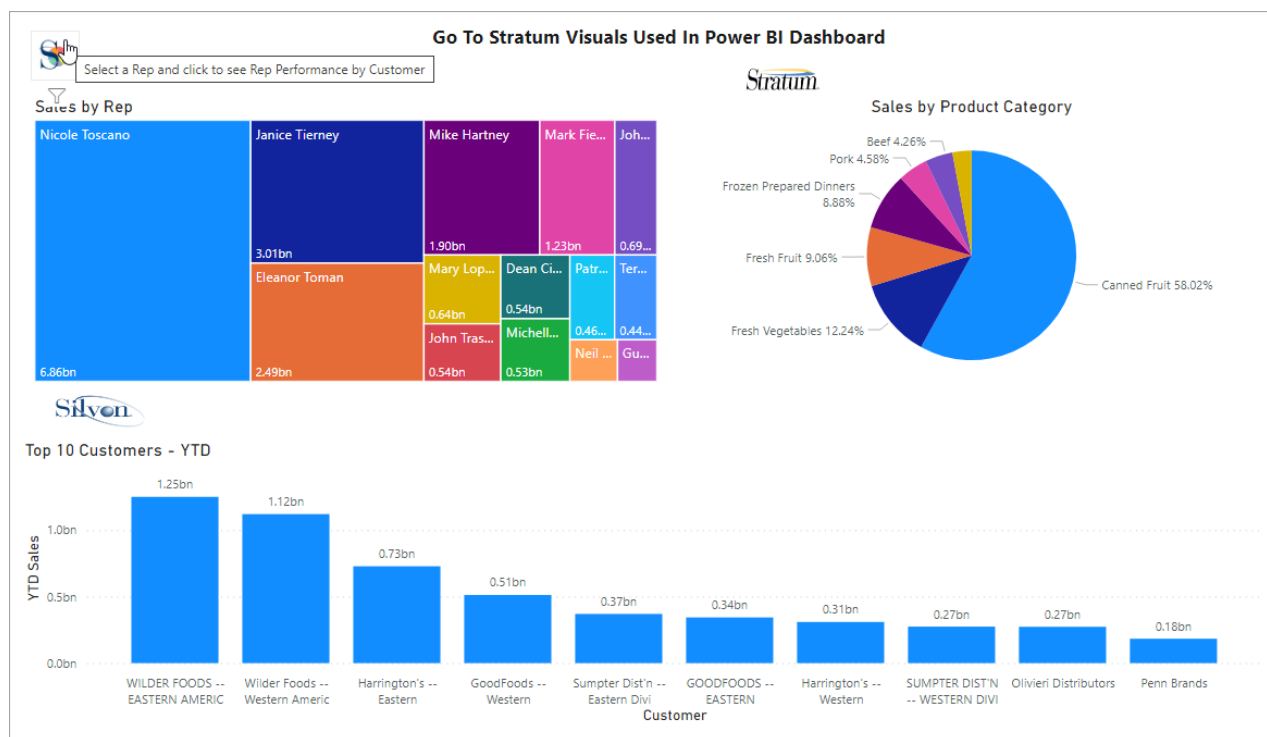
Go From Dashboard Visualization To Actionable Data In A Single Click

Access your Stratum data using the interactive drill-down feature of Silvon's Go To Stratum Power BI custom visual. It is part of Silvon's full suite of pre-packaged Analytical Applications and Stratum Data Hub that are easy to customize and designed to get users up-and-running quickly in their analysis of operational-level data.

With Silvon's Go To Stratum visual, you can quickly and seamlessly move from a high level visualization in your Power BI Dashboard to detail data that drives greater insights and supplies actionable information. To drill-into data, simply select the data point of interest, click the visual, and see the detail data associated with it in Stratum Viewer. From there, you have full capabilities of the Stratum Viewer analysis grid and Stratum Data Hub.

Note: This add-in can only be used in conjunction with Silvon's Stratum Data Hub. To learn more, visit us at www.silvon.com.

Each visual in the following dashboard has a Go To Stratum visual above it, represented by a small clickable image that can take users to additional relevant details. The heat map in the top left of the dashboard has a Go To Stratum visual that can open a detailed sales plan analysis for any RepBroker in the main visual.



Key Features & Business Applications

Go To Stratum has the following key features:

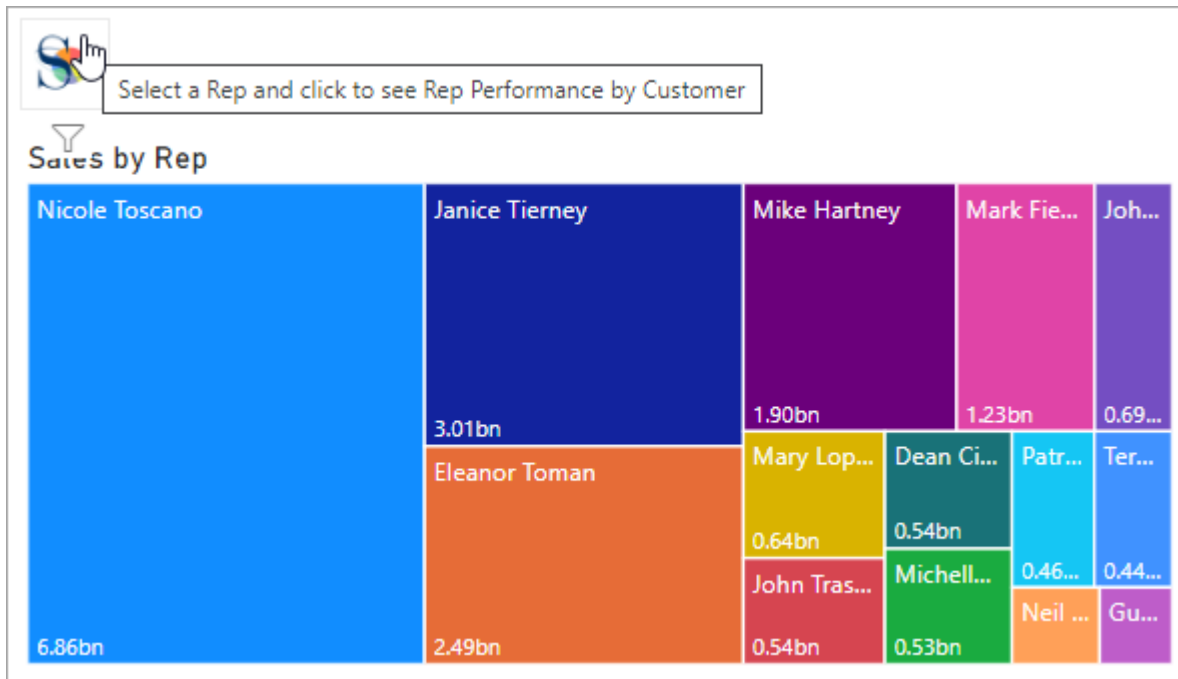
1. User can quickly and seamlessly move from any visualization in your Power BI dashboard to the Stratum detail data that supports the visualization.
2. Drill from a graphical representation of business data to the actionable detail data that resides in your Stratum Data Hub and that displays in a familiar grid format.
3. Pass values to Stratum during the drill through from Power BI so you can filter the resulting detail view of your data. Filter with values from a Power BI visual or measure-based DAX expression.
4. Fully integrated with Stratum and compliments other pieces of the Stratum Access Hub. Launching any of your Stratum views from Power BI to access their data is just a click away.
5. Backed by a consistent, trusted source of information – the Stratum Data Hub. You get a single version of the truth whether you are looking at visual in Power BI or detail data in Stratum Viewer.

Business applications for using the Go To Stratum visual with Power BI:

1. Drill from a YTD Sales heat map visual in Power BI to an extensive sales plan analysis in Stratum that is filtered by a rep represented in the heat map. See the rep's expected sales, percent difference between actual vs. plan along with details like Open Orders, Planned Daily Run Rate, and Actual Daily Run Rate.
2. Jump from Supply Chain KPI in a Power BI Dashboard to the supporting supply chain performance data that aid supply chain analysts in tasks around Inventory, demand, procurement, and delivery statistics.
3. Link up a Power BI map visual containing distribution data to a Stratum visual that takes you to detailed product analytics. Use detail in the Stratum view to assess day-to-day operational information, ensure that you can accommodate customer demand, and check that your resources are optimally utilized.
4. Go from a macro look at Product Groups to a micro view of the products that make up those Groups – use pre-built Stratum analytics to see product level data such as sales to plan performance, open orders, on hand inventory, and days of inventory levels for your key products.
5. Seamlessly move from a Financial Dashboard that includes expenses to the department account and transaction level detail.

Open A Stratum Report Filtered By a Single Value

In this example, the user can select a RepBroker in the heat map and then click on the Go To Stratum icon above the map. This will open a browser tab that shows detailed sales plan analysis in Stratum that's filtered by the selected RepBroker. See the rep's expected sales, percent difference between actual vs. plan along with details like Open Orders, Planned Daily Run Rate, and Actual Daily Run Rate.



Here's the Stratum report that opened when a user clicked Eleanor Toman in the heat map and then clicked the Go To Stratum visual.

★ Sales to Plan Performance Rep

1 to 20 of 280 | 1 to 8 of 8

Rows: RepBroker: Filtered x | Customer Sold-To: All x | Customer Ship-To: All x | Product Category x | Product x +

Columns: +

View Filter: +

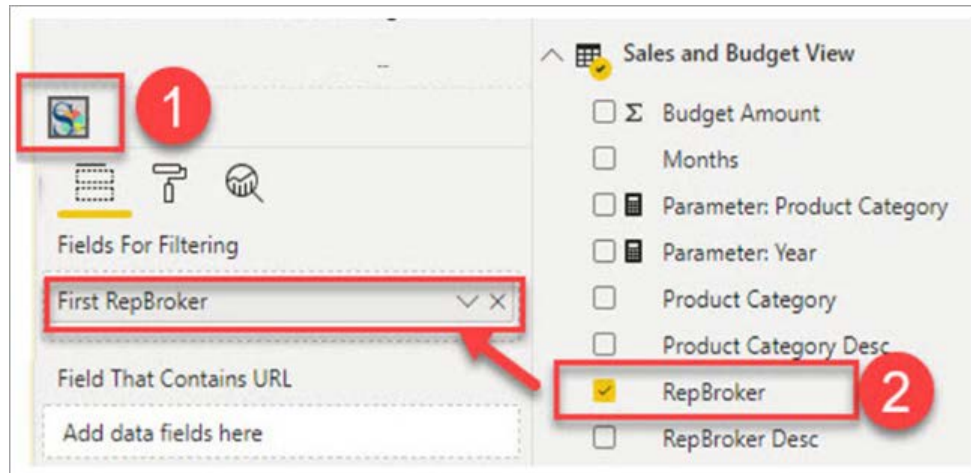
RepBroker	RepBr Long Description	Customer Sold-To	SldTo Long Description	Customer Ship-To	ShpTo Long Description	Actual Sales Amount Sep 20 to Sep 20	Plan Sep 20 to Sep 20	% Diff	Amt Diff	Plan Jan 20 to Sep 20	Actual Sales Amount Jan 20 to Sep 20	Amt Diff	% Diff
313	Eleanor Toman	150170	GOODFOODS -- EASTERN	101122	GoodFoods -- Dallas TX	\$1,057,641		100.00%	-\$1,057,641		\$10,092,515	-\$10,092,515	100.00%
				101122AATQ	GoodFoods -- Dallas TX TQA	\$37,336		100.00%	-\$37,336		\$318,087	-\$318,087	100.00%
				101122ACTH	GoodFoods -- Dallas TX THA	\$200,589		100.00%	-\$200,589		\$1,754,276	-\$1,754,276	100.00%
				101122ADMC	GoodFoods -- Dallas TX MCA	\$173,263		100.00%	-\$173,263		\$1,839,899	-\$1,839,899	100.00%
				101122AEWO	GoodFoods -- Dallas TX WOA	\$406,887		100.00%	-\$406,887		\$4,135,417	-\$4,135,417	100.00%
				101122ALAB	GoodFoods -- Dallas TX ABA	\$239,566		100.00%	-\$239,566		\$2,044,837	-\$2,044,837	100.00%
				101122BATQ	GoodFoods -- Dallas TX TQB	\$74,673		100.00%	-\$74,673		\$636,173	-\$636,173	100.00%
				101122BCTH	GoodFoods -- Dallas TX THB	\$401,178		100.00%	-\$401,178		\$3,508,552	-\$3,508,552	100.00%
				101122BDMC	GoodFoods -- Dallas TX MCB	\$346,525		100.00%	-\$346,525		\$3,679,798	-\$3,679,798	100.00%
				101122BEWO	GoodFoods -- Dallas TX WOB	\$813,774		100.00%	-\$813,774		\$8,270,834	-\$8,270,834	100.00%
				101122RIAR	GoodFoods -- Dallas TX ABB	\$479,131		100.00%	-\$479,131		\$4,089,674	-\$4,089,674	100.00%

Notes: If the user does not select a RepBroker in the heat map and clicks the Go To Stratum visual, the first RepBroker value will be used to filter the specified report.

Also, if the user selects multiple RepBrokers in the heat map and clicks the Go To Stratum visual, the first selected RepBroker will be used to filter the specified report. If you want to be able to filter by multiple RepBrokers, see the example in the [Open A Stratum Report Filtered By Multiple Values](#).

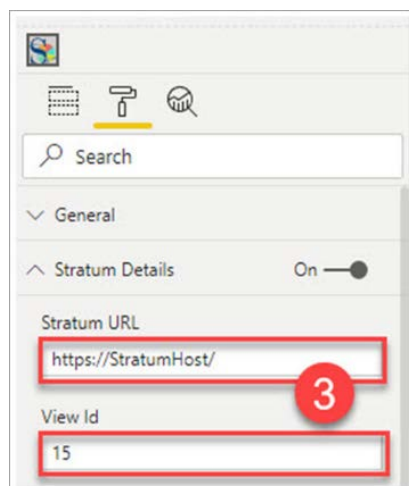
Here's the steps for setting up the Go To Stratum visual.

1. Add the Go To Stratum custom visual to your report.
2. On the Fields tab, select the field that contains the dimension value that you want passed as a filter to your Stratum view. This must be the same dimension value used in the associated visual. In this example, RepBroker is used in the heat map visual and in the associated Go To Stratum visual.

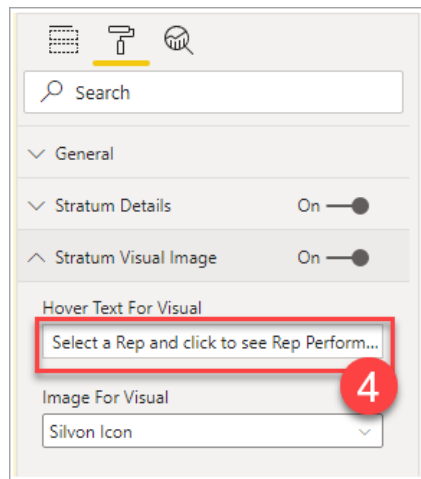


3. From the Format section's Stratum Details properties, specify your Stratum URL and the View Id that will open when the user selects a RepBroker and then clicks the Go To Stratum visual.

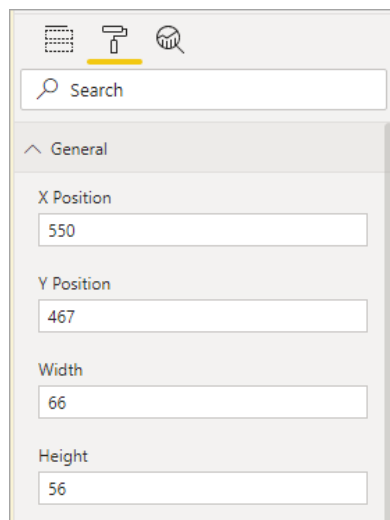
Note: You can locate the Id for views in various Stratum spots such as the Properties window for a view or from the administrator window for managing views.



4. From the Format section's Stratum Visual Image properties, customize the hover text for the visual. You can also choose between a few different images to show in the visual. The Silvon Icon was used in this example.



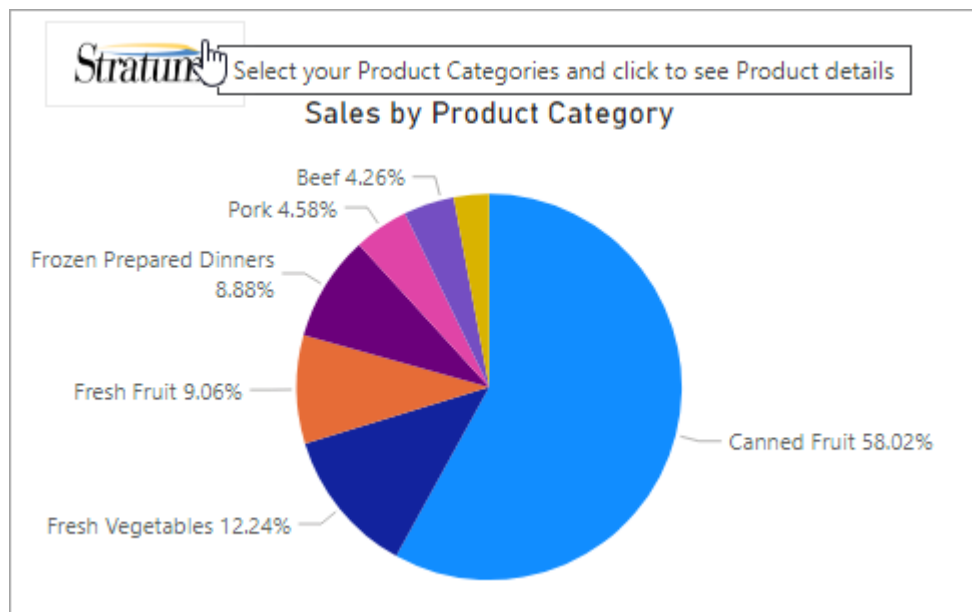
5. Optionally adjust the size and position of the visual. This can be done by clicking and dragging on the border of the visual or by entering values in the visual's General format properties.



Open A Stratum Report Filtered By Multiple Values

In this example, the Go To Stratum visual is configured to go from a Power BI visual to a Stratum report that is filtered by multiple values. Prior to setting up the visual, a measure that uses a DAX expression was set up in Power BI as the field to use when activating the visual and for filtering with the visual.

After the visual is in place, a user selects Product Categories in the pie chart and clicks the Go To Stratum icon. This will open a browser tab that uses pre-built Stratum analytics to see product level data for the selected categories such as sales to plan performance, open orders, on hand inventory and days of inventory levels.



Note: If the user does not select a Product Category in the pie chart and clicks the Go To Stratum visual, then no Product Category filter will be applied to the specified report.

Here's the report that opened after a user picked Fresh Fruit and Fresh Vegetables in the chart then clicked the Go To Stratum visual.

★ Sales to Plan Performance Product Category

Rows: Product Category: Filtered x | Product: All x +

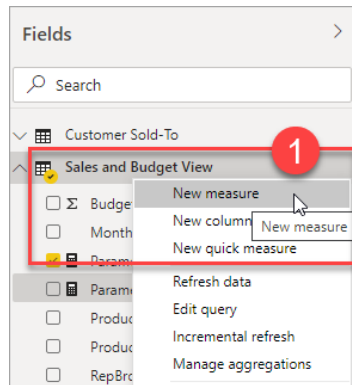
Columns: +

View Filter: +

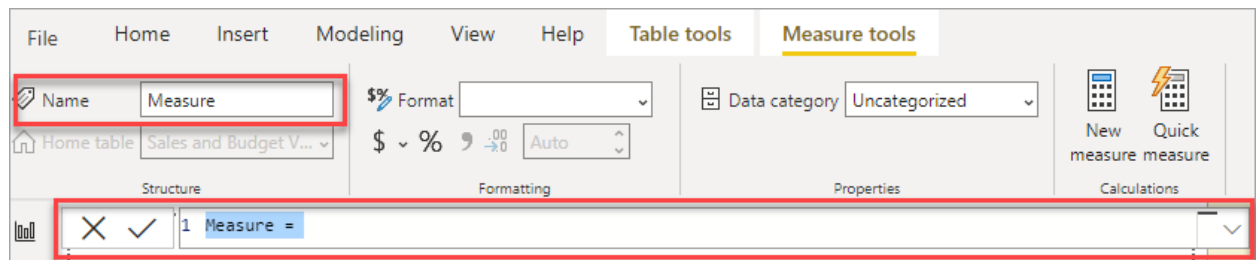
Product Category	PCat Short Description	Product	On Hand Inventory	Open Orders Current Month	Expected Orders	Inventory Days on Hand	Sales Current Month	Plan Current Month	Amt Diff	% Diff	Sales YTD Current Year	Plan YTD Current Year	Amt Diff	% Diff
Filtered With Members:	vegetables	620A954000	\$121,648		\$48,859	40	\$48,859		-\$48,859	100.00%	\$465,553		-\$465,553	100.00%
200 - Fresh Vegetables		620A954011	\$143,275		\$98,661	15	\$98,661		-\$98,661	100.00%	\$776,248		-\$776,248	100.00%
204 - Fresh Fruit		620A954014	\$461,570		\$87,484	28	\$87,484		-\$87,484	100.00%	\$1,500,643		-\$1,500,643	100.00%
		620B954000	\$243,296		\$97,718	40	\$97,718		-\$97,718	100.00%	\$931,105		-\$931,105	100.00%
		620B954011	\$286,550		\$197,323	15	\$197,323		-\$197,323	100.00%	\$1,552,495		-\$1,552,495	100.00%
		620B954014	\$923,139		\$174,968	28	\$174,968		-\$174,968	100.00%	\$3,001,285		-\$3,001,285	100.00%
		620C954000	\$133,813		\$53,745	40	\$53,745		-\$53,745	100.00%	\$512,108		-\$512,108	100.00%
		620C954011	\$157,602		\$108,528	15	\$108,528		-\$108,528	100.00%	\$853,872		-\$853,872	100.00%
		620C954014	\$507,727		\$96,233	28	\$96,233		-\$96,233	100.00%	\$1,650,707		-\$1,650,707	100.00%
		620D954000	\$145,978		\$58,631	40	\$58,631		-\$58,631	100.00%	\$558,663		-\$558,663	100.00%
		620D954011	\$171,930		\$118,394	15	\$118,394		-\$118,394	100.00%	\$931,497		-\$931,497	100.00%
		620D954014	\$553,884		\$104,981	28	\$104,981		-\$104,981	100.00%	\$1,800,771		-\$1,800,771	100.00%
		620E954000	\$158,142		\$63,517	40	\$63,517		-\$63,517	100.00%	\$605,218		-\$605,218	100.00%

Here's the steps for setting up the measure with the DAX expression and then the Go To Stratum visual.

1. Add a new measure to the table used to create the main Power BI visual.



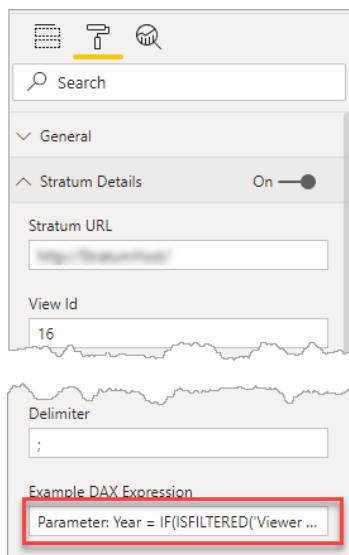
2. Set up the name and expression for the measure. The measure must be named as follows: Parameter: <Dimension Name> where Dimension Name is the dimension field from the table to be used in your filter.



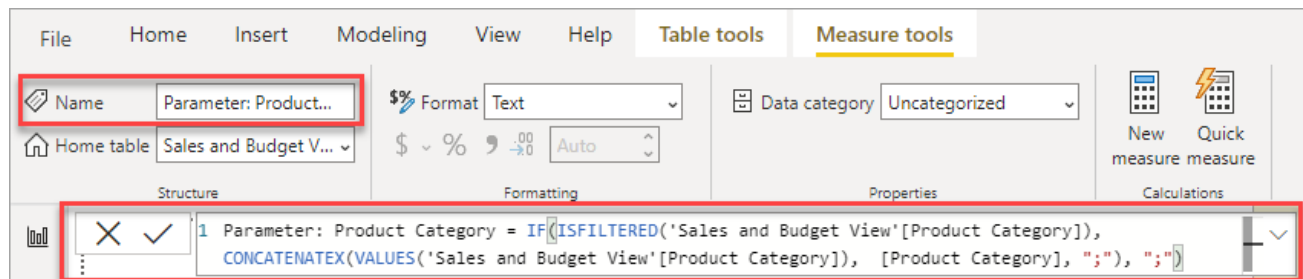
A sample of the DAX expression to use can be found under the Stratum Detail section of the format tab of the Go To Stratum custom visual. A measure will need to be created for each dimension that will be used as a filter. Here is the sample syntax and the types of objects used in each part of it:

Parameter: **Year** = IF(ISFILTERED('Viewer Source View Table Name'[Year]), CONCATENATEX(VALUES('Viewer Source View Table Name'[Year]), [Year], ";"), ";")

- **Viewer Source View Table Name** = This is the name of the table in your Power BI report, which is the name of the Stratum view that is used as the data source for this report.
- **Year** = This is the name of the field from the Viewer Source View Table Name that will be used as a filter. The field must be a field that is associated with a dimension.



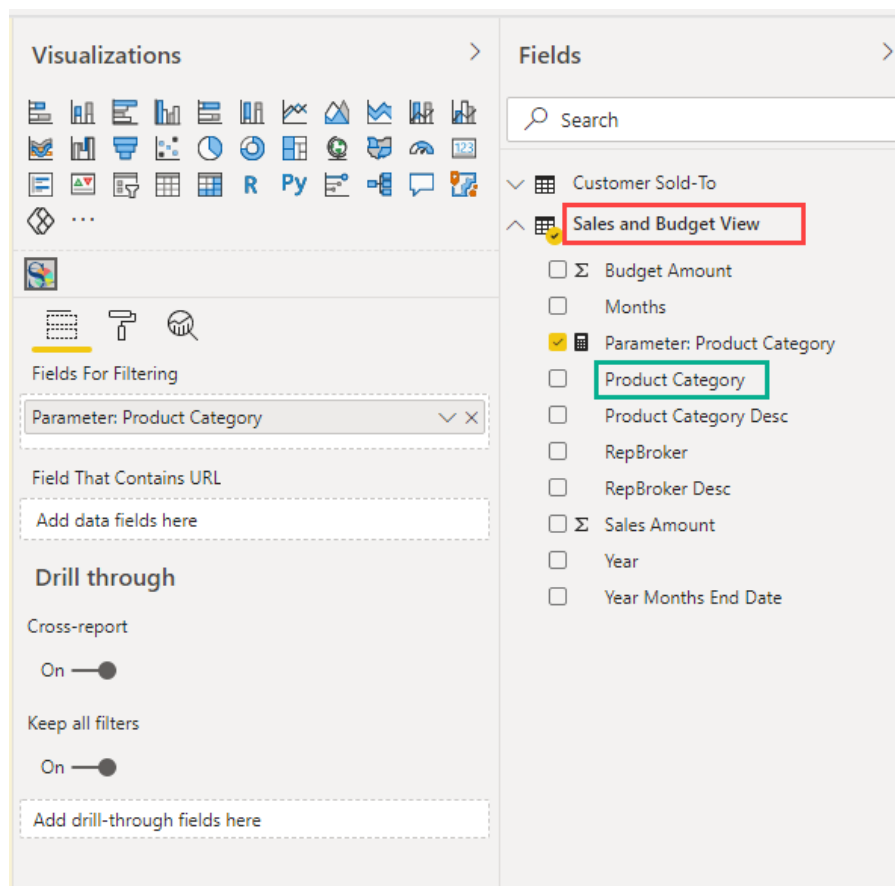
In this example, a measure named "Parameter: Product Category" was added to the Sales and Budget View table.



Here is the field created to filter our example report.

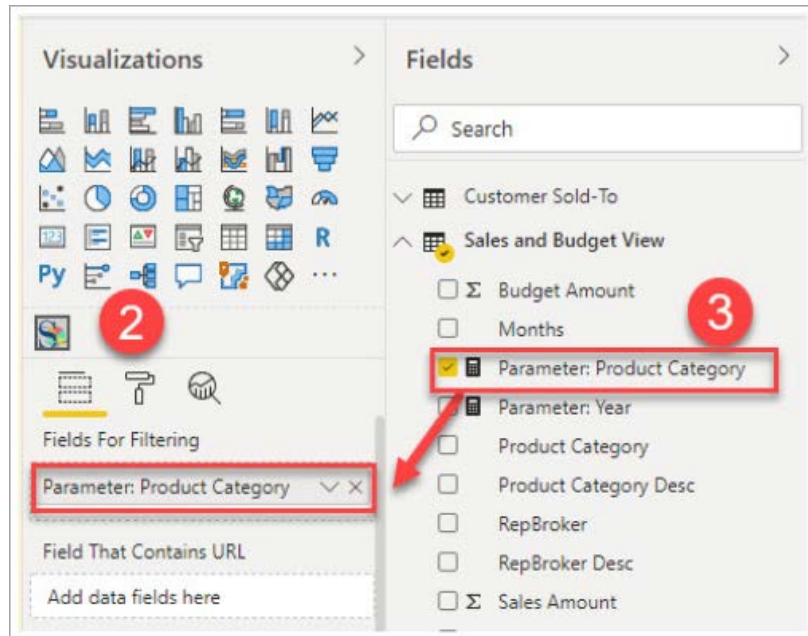
Parameter: Product Category = IF(ISFILTERED('Sales and Budget View'[Product Category]),
CONCATENATEX(VALUES('Sales and Budget View'[Product Category]), [Product Category], ";"), ";")

- **Sales and Budget View** = This is the name of the table in your Power BI report, which is the name of the Stratum view that is used as the data source for this report.
- **Product Category** = This is the name of the dimension field from the specified Sales and Budget View table that will be used as a filter.



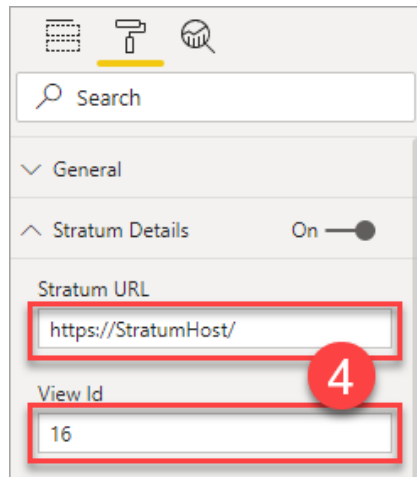
3. Add the Go To Stratum custom visual to your report.

4. From the Fields tab, select the measure(s) that you created in Step 1.

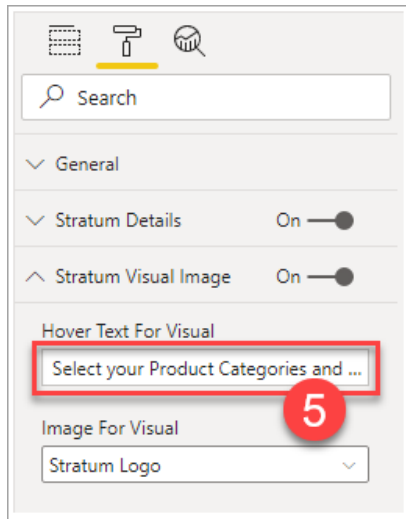


5. From the Format section's Stratum Details properties, specify your Stratum URL and the View Id that will be open in a new tab when the user selects Product Category(s) and then clicks the Go To Stratum visual.

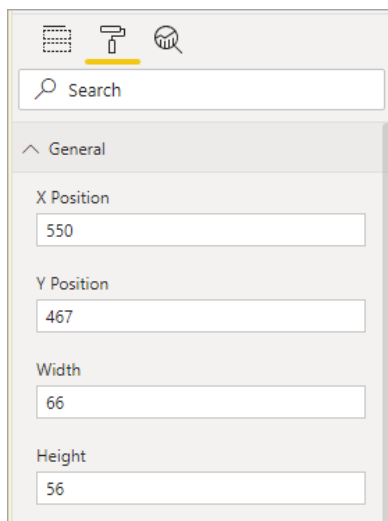
Note: You can locate the Id for views in various Stratum spots such as the Properties window for a view or from the administrator window for managing views.



6. From the Format section's Stratum Visual Image properties, customize the hover text for the visual. You can also choose between a few different images to show in the visual. The Stratum Logo was used in this example.

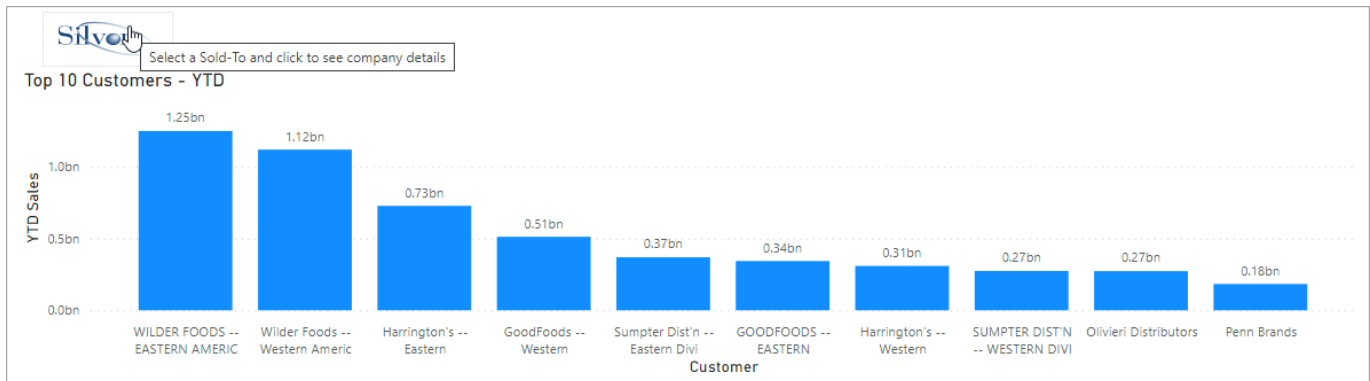


7. Optionally adjust the size and position of the visual. This can be done by clicking and dragging on the border of the visual or by entering values in the visual's General format properties.



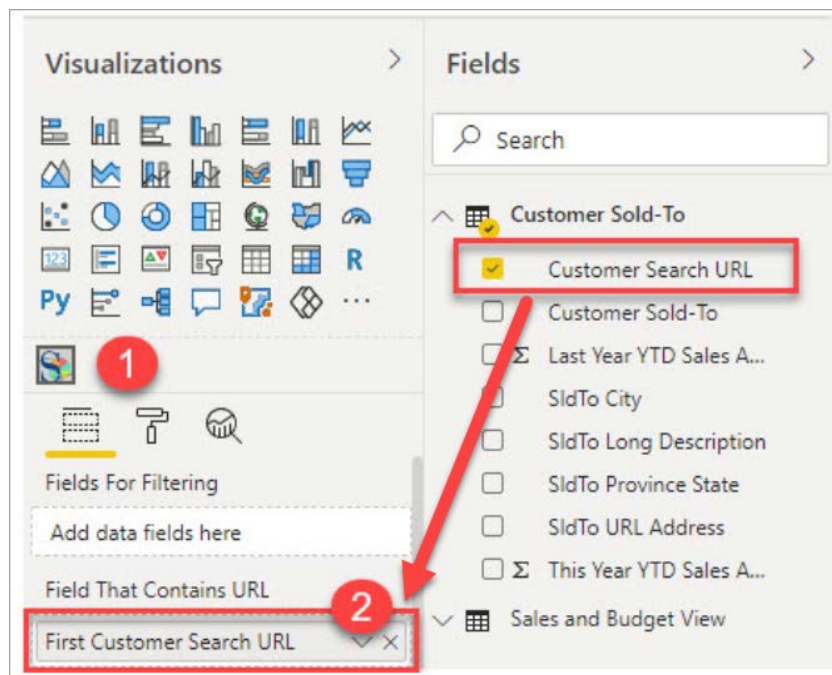
Open A URL

In this example, the Go To Stratum visual is configured to go from a Power BI visual to a URL that is built from a data field. The user selects a Customer sold-to in the column chart and clicks the Go To Stratum icon. This will open a browser tab that takes them to the customer's website.

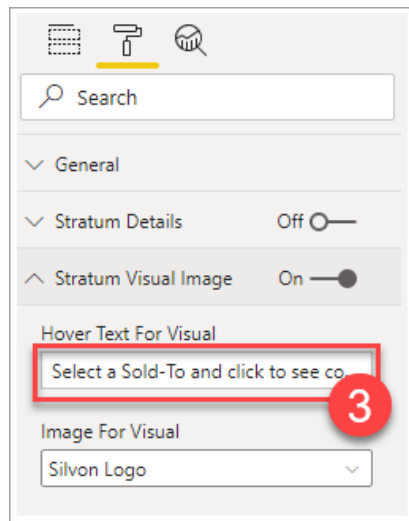


Here's the steps for setting up the Go To Stratum visual.

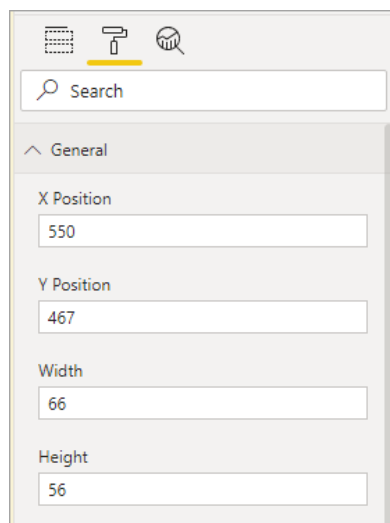
1. Add the Go To Stratum custom visual to your report.
2. From the Fields tab, select the field that contains a URL. In this example, the "Customer Search URL" field is selected as the "Field That Contains URL". The contents of this field will be used to open a new browser tab when the user selects a Customer from the column chart and clicks the Go To Stratum visual.



3. From the Format section's Stratum Visual Image properties, customize the hover text for the visual. You can also choose between a few different images to show in the visual. The Silvon Logo was used in this example.



4. Optionally adjust the size and position of the visual. This can be done by clicking and dragging on the border of the visual or by entering values in the visual's General format properties.



Fields & Format Properties For Go To Stratum

The Go To Stratum Visual has properties that are unique to that visual. They show up in the Fields and Format sections of the Power BI Visualizations tab when you are working with the visual. Some properties are required, others optional, and some are disabled depending on your selections in the Fields section for the visual.

Field(s) For Visual

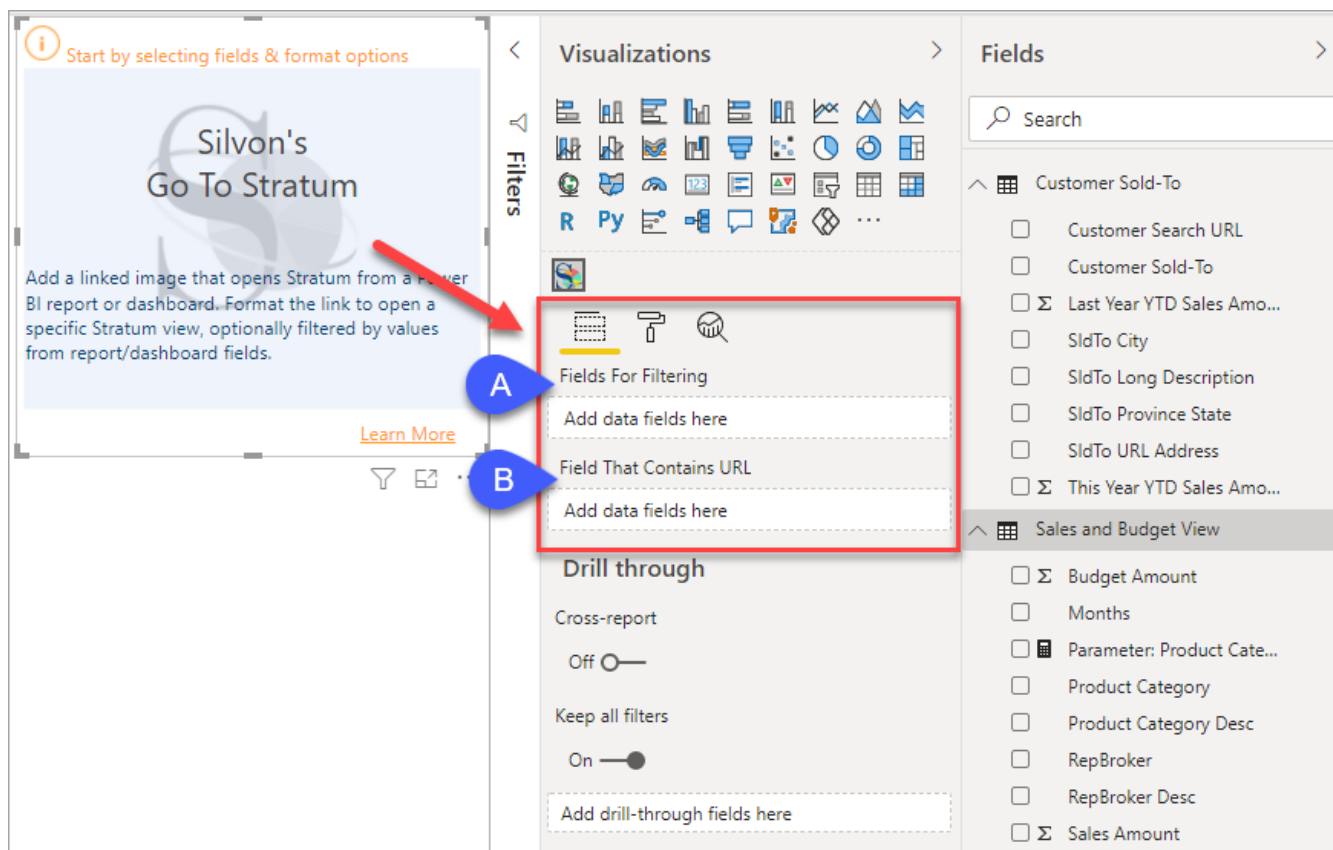
Activating the visual requires specifying a data field that will be used either for filtering the Stratum report that the visual opens **or** that contains a URL the visual will open. You will drag the field into either the Fields For Filtering or Field That Contains URL property. Hover over a property for information about using it.

- A. The **Fields For Filtering property** is used to specify fields for filtering the Stratum report that the visual opens. The field can be a dimension from a Stratum view attached to your Power BI dashboard or a measure you've set up in Power BI that uses a DAX expression to specify dimension and other filtering details. The first two examples in this user guide use the Fields For Filtering property.

Note: The fields used for filtering should also be used in the main visual for which the Go TO Stratum visual is meant to be with in your Power BI dashboard.

- B. The **Field That Contains URL property** is used to specify a data field that contains a URL for the visual to open. The field is one that exists in the Stratum view used as the data source for the Power BI report or dashboard. The last example in this user guide uses the Field That Contains URL property.

Note: The Stratum Details properties under the Format section of your visualization are set to Off for Field That Contains URL cases because they are not needed. The data field contains website URL and other details.



Format Properties - Stratum Details

The Stratum Details section is used **only** when the visual uses the Fields For Filtering property. Hover over any property for information about using it.

- A. The first two properties supply Stratum website and Stratum view info to the visual.
- B. The next set of properties control which parts of Stratum will display when the visual opens it.
- C. The last property has example syntax for a DAX expression that can be used in cases where you set up a measure to use as the visual's Fields For Filtering property.

Note: The Stratum Details section is set to Off when your visual uses the Field That Contains URL property.

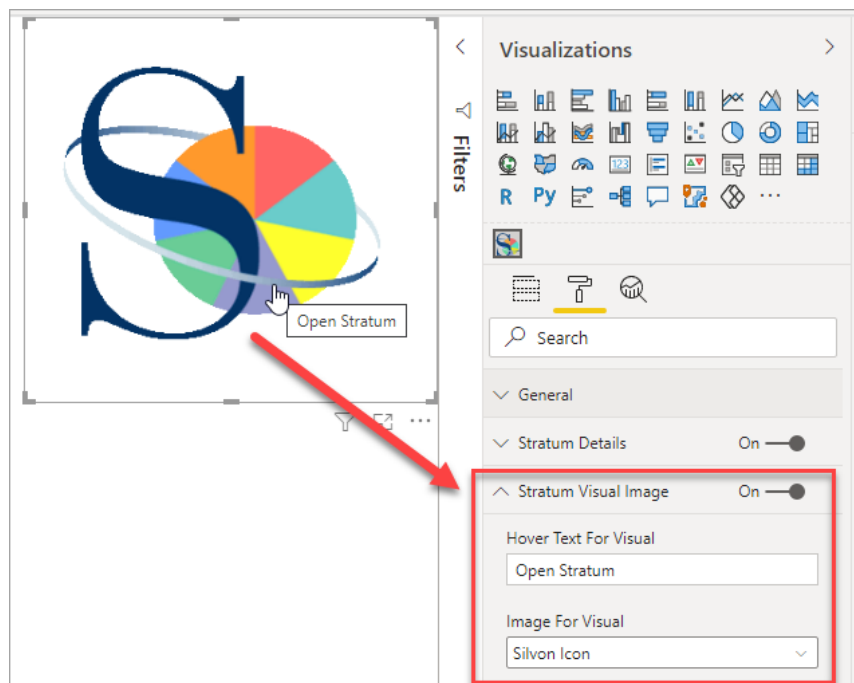
The screenshot shows the 'Visualizations' pane on the left with 'Fields For Filtering' set to 'First RepBroker'. A red arrow points from this dropdown to the 'Stratum Details' section in the main configuration pane. The 'Stratum Details' section is currently 'On' and contains the following properties:

- Stratum URL:**
- View Id:**
- View Pane:** Off
- View Name:** On
- View Filter:** On
- View Image:** On
- Paging Icons:** On
- View Icons:** On
- View Explorer:** Off
- Navigation Panel:** On
- Use Data Fields as Filters:** On
- Delimiter:**
- Example DAX Expression:**

Callout A points to the 'Stratum URL' field. Callout B points to the 'View Pane' section. Callout C points to the 'Example DAX Expression' field.

Format Properties – Stratum Visual Image

The Stratum Visual Image section is used to customize the hover text and image selected for the visual. Hover over a property for information about it.



You can adjust the placement and size of the visual using values in the General properties, which show up in the Format section of the Visualizations tab. Clicking and dragging on the border handles for the visual are other options for adjusting placement and size.

