



Working with Drilldown Views

Stratum.Viewer 6

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Getting Started

Access to Drilldown Views

Your user profile level controls what you can do with drilldown views.

User Profile Level	Drill to Them from Views	Attach Them to Views	Detach Them from Views
Casual*	x		
Advanced	x	x	x
View Administrator	x	x	x
Security Administrator	x	x	x



*Casual use of drilldown views is limited to drilling to them from view objects to which your administrators have attached the drilldown views.

Tasks

Attach a Drilldown View to Levels in Rows or Columns

1. Double-click the Rows or Columns folder in [view explorer](#).

OR

1. Right-click the rows  or columns  axis symbol in the grid and select Properties.
2. In the [Rows](#) or [Columns](#) Properties window, select a view from the Drilldown View drop-down list.

Attach a Drilldown View to Measure Items



1. Double-click the Measure Items folder in [view explorer](#).
2. In the [Properties window](#), select a view from the Drilldown View drop-down list.

Remove Drilldown View Associations

For Levels in Rows or Columns

1. Double-click the Rows or Columns folder in [view explorer](#).

OR

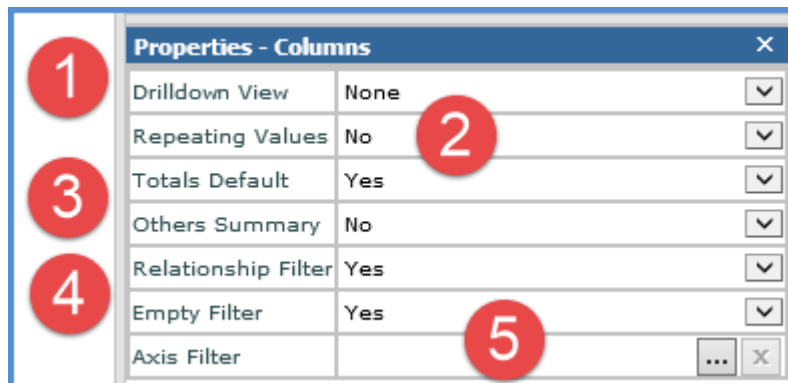
1. Right-click the rows  or columns  axis symbol in the grid and select Properties.
2. In the [Rows](#) or [Columns](#) Properties window, select None from the Drilldown View drop-down list.





For Measure Items

1. Double-click the Measure Items folder in [view explorer](#).
2. Select None from the Drilldown View drop-down list.

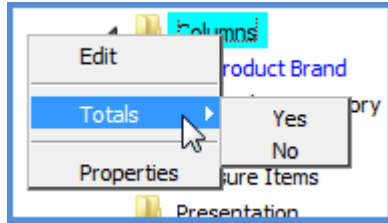
Windows

Properties Window for Columns



	Drilldown View – Assign a drilldown view if you want to drill from the last level displayed on columns to another view, for example, to a view with related or complimentary data to the originating view. Choose from views that you normally have access to in the application.
	Repeating Values – Use to control whether or not duplicate column values display in the grid. Set the option to Yes if you want to see the following values repeated across the column detail cells in the grid: level display text, level attribute relationships, headings for All Others (if Others Summary is enabled), sub-totals, and grand totals.
	Totals Default – Use to control whether or not Totals display by default for new levels inserted on columns. Leave the property set to Yes if you want all new levels that are inserted on columns to have totals displayed for them. Change to No if you want totals to be disabled for all new levels that you insert on columns. You can customize totals for new and existing levels in other ways using other settings: <ul style="list-style-type: none">• Change totals for individual levels, one level at a time. Use the “Total” setting in the Properties window for individual levels to show or hide their totals.• Change totals for all levels on columns at once. Use the “Totals” option on the pop-up menu for the columns axis (right-click the columns axis icon ) or by right-clicking the Columns folder in view explorer. Selecting Yes from the menu displays totals for all levels on columns and sets the “Totals Default” to Yes. Selecting No hides totals for all levels on columns and sets the “Totals

Default" to No.




Others Summary – Use to control whether or not All Others data displays in columns for filtered levels. Select Yes if you want the "All Others" columns to display. For example, if you have filtered a level by certain members, you could set Others Summary to Yes to see the sum of all other members not in the filter. Select No if you do not want All Others data to display.

4

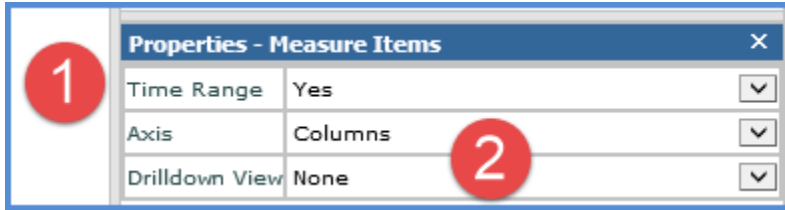
Relationship Filter and Empty Filter – When the Relationship Filter is set to Yes, only the members that have data for the measures and time ranges defined in the view will display. When the Relationship Filter is set to No, all members will be displayed. This allows you to see members with and without data for the measures and time ranges defined in the view. You can additionally use the Empty Filter property. In order for the Empty Filter property to be set to Yes, the Relationship Filter property must be set to Yes. The empty filter will remove any columns where no data exists, but that were not removed by the relationship filter. This can occur when there is a level filter on the axis opposite the measure item axis.

5

Axis Filter – Use to work with an axis filter on columns:

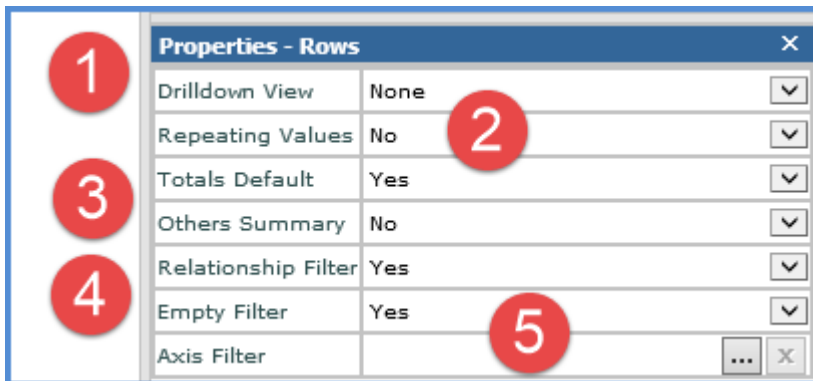
- Click the Browse button  to add or edit a filter on the columns axis. An Expression window displays for setting up the filter. A pop-up label for this field displays expression criteria for an existing filter.
- Click the "X" button to remove a filter.

Properties Window for Measure Items Axis




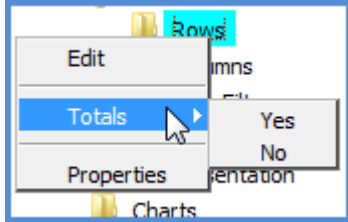
1	<p>Time Range – This controls the type of measure items that you can set up for the view – either measure items with time ranges (Yes) or measure items without time ranges (No). Leave the property set to Yes if you want to work with measure items that have time ranges. Time hierarchies will not be available. Change the property to No if you want to work with measure items without time ranges and want to be able insert time hierarchies into the view.</p> <p>Changing this property for existing views will impact existing measure items and time hierarchies.</p> <ul style="list-style-type: none"> • Change from Yes to No = existing measure items will be removed. Then you can work with time hierarchies and measure items without time ranges. • Change from No to Yes = existing measure items and time hierarchies will be removed. Then you can work with measure items that have time ranges.
2	<p>Drilldown View - Assign a drilldown view if you want to drill from measure items to another view, for example, to a view with related or complimentary data to the originating view. Choose from views that you normally have access to in the application.</p>

Properties Window for Rows



1	<p>Drilldown View – Assign a drilldown view if you want to drill from the last level displayed on rows to another view, for example, to a view with related or complimentary data to the originating view. Choose from views that you normally have access to in the application.</p>
2	<p>Repeating Values – Use to control whether or not duplicate row values display in the grid. Set the option to Yes if you want to see the following values repeated across the row detail cells in the grid: level display text, level attribute relationships, headings for All Others (if Others Summary is enabled), sub-totals, and grand totals.</p>
3	<p>Totals Default – Use to control whether or not Totals display by default for new levels inserted on rows. Leave the property set to Yes if you want all new levels that are inserted on rows to have totals displayed for them. Change to No if you want totals to be disabled for all new levels that you insert on rows. You can customize totals for new and existing levels in other ways using other settings:</p>

- Change totals for individual levels, one level at a time. Use the "Total" setting in the Properties windows for individual levels to show or hide their totals.
- Change totals for all levels on rows at once. Use the "Totals" option on the pop-up menu for the row axis (right-click the rows axis icon ) or by right-clicking the Rows folder in view explorer. Selecting Yes from the menu displays totals for all levels on rows and sets the "Totals Default" to Yes. Selecting No hides totals for all levels on rows and sets the "Totals Default" to No.




Others Summary – Use to control whether or not All Others data displays in rows for filtered levels. Select Yes if you want the "All Others" rows to display. For example, if you have filtered a level by certain members, you could set Others Summary to Yes to see the sum of all other members not in the filter. Select No if you do not want All Others data to display.

4

Relationship Filter and Empty Filter – When the Relationship Filter is set to Yes, only the members that have data for the measures and time ranges defined in the view will display. When the Relationship Filter is set to No, all members will be displayed. This allows you to see members with and without data for the measures and time ranges defined in the view. You can additionally use the Empty Filter property. In order for the Empty Filter property to be set to Yes, the Relationship Filter property must be set to Yes. The empty filter will remove any rows where no data exists, but that were not removed by the relationship filter. This can occur when there is a level filter on the axis opposite the measure item axis.

5

Axis Filter – Use to work with an axis filter on rows:

- Click the Browse button  to add or edit a filter on the rows axis. An Expression window displays for setting up the filter. A pop-up label for this field displays expression criteria for an existing filter.
- Click the "X" button to remove a filter.

View Explorer










The elements in view explorer are organized into a tree structure that has expandable/collapsible folders. Folders are described in the following table. Color-coding is used throughout to help you distinguish which items will be visible in the grid and which are hidden.

- **Items in blue text** – Any items currently shown in the grid. Their Visible property is “Yes” in their Properties window.
- **Items in black text** – Any items that are not actively shown in the grid, but that have a Visible property of “Yes.” This means they will display in the grid once you reach them in the drill down path for the view.
- **Items in grey text** – Any items that have a Visible property of “No.” For levels, this means they will not display in the grid as you drill through it. Attribute relationships, measure items, and charts displayed in

grey text also will not display in the grid. You can right-click on them anytime and select Show to make change their Visible property.

When you click an item, it is highlighted in a bright blue box like the view name, “Customer Ship-To Sales,” in the above example. When double-clicked, the Properties window of the active item opens at the bottom of the view explorer as shown in the above example. You can also right-click to invoke a pop-up menu of actions to take on items from view explorer.

<p>1</p>	<p>View name folder – displays the name of the view. Double-click to access the Properties window for editing basic properties like the Name, Type, Planning, and View Group properties. Administrators can use the Owner property to change the owner of a view.</p>
<p>2</p>	<p>Parameter Groups folder – for parameter groups and parameters within each group. As you insert groups and parameters, they will display under this folder. Each group and parameter has a related Properties window. You can drag and drop groups and parameters within each group to rearrange them.</p>
<p>3</p>	<p>Grid folder – The folders for Rows, Columns, View Filters, and Measure Items are organized under the Grid folder. From the Grid folder, you can access a Grid Properties window which determines if the grid is visible and if paging is enabled for the grid display.</p> <p>Rows and Columns folders – All of the included levels and attribute relationships, grouped by hierarchy, display appropriately in the Rows and Columns folder. You can move hierarchies along with their levels and attribute relationships between the Rows, Columns, or View Filter by dragging and dropping them within view explorer or into the grid from view explorer. Properties windows exist for hierarchies, levels, and attribute relationships in these folders. Use them to hide or show items, set up filters or sorting, control totals, etc.</p> <ul style="list-style-type: none"> • Hierarchies  – This image displays next to the names of hierarchies. • Levels  – Blue boxes next to a level indicate the level it is based for all the levels in its hierarchy. For example, a level with one box next to it would be the first level for its hierarchy. A level with two boxes next to it would be the second level available in its hierarchy, and so forth. • Attribute Relationships  – This image displays next to the names of attribute relationships for levels.
<p>4</p>	<p>View Filter folder – Levels included in the view filter. Setting up a view filter requires a level to be in the View Filter section and then applying a filter to that level. Drag or drop the desired level(s) into the View Filter section of the grid or into the View Filter folder of view explorer.</p>
<p>5</p>	<p>Measure Items folder – All measure items defined for this view display in the folder. You can edit, insert, remove and hide measure items from this folder. The Time Range controls the type of measure items that you can set up for the view – either measure items with time ranges (Yes) or measure items without time ranges (No). You can also use the Properties windows for individual measure items to change their caption, images, conditional formatting, pop-up labels, hyperlinks, filtering, sorting, totals, etc.</p> <ul style="list-style-type: none"> • Regular Measure Item  – This image displays next to regular measure items. • Calculated Measure Item  – This image displays next to calculated measure items. • Distinct Calculated Measure Item  – This image displays next to distinct calculated measure items.
<p>6</p>	<p>Presentation folder – The properties for this folder are used to set the default presentation format for the view (either Viewer or Excel) and to determine whether or not users will be prompted to choose the presentation format before the view opens for them.</p> <p>Chart folder – The Chart folder displays the names of any charts  that you have created for a view. Charts displayed in blue are currently visible in the grid. Charts displayed in grey are hidden.</p>

Charts can be dragged and dropped in the folder to change the order in which they display in the grid.
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Advanced Concepts

Cell Formatting with Conditional Formats, Hyperlinks, Drilldown Views, and Pop-up Labels

Grid formatting and pop-up label text for a measure item are influenced by the combination of properties you have set up for a measure item and for the Measure Items axis. Contributing factors for formatting are the Conditional Format, Hyperlink, and Drilldown View properties. Contributing factors for pop-up label text are the Pop-up Label Expression, Hyperlink, and Drilldown View properties.

Note: Conditional Format, Hyperlink, and Pop-up Label Expression properties are set up by individual measure items. The Drilldown View property is set up for all measure items via the Measure Items folder in view explorer.

Some properties take precedence over others, which is taken in to consideration by Stratum.Viewer when it displays measure items in the grid. Here are the priorities given to the properties for formatting and pop-up labels. Examples are provided.

Priority for Formatting Properties

1. If a conditional format exists for the measure item, then format the measure item cells based on the Format properties of the conditional format rules (for example the background color, font color, or font weight).

Note: The conditional format takes precedence over hyperlink and drilldown view formatting even if the conditional format rules do not result in any special formatting for a specific cell.

2. Else if hyperlink is defined for the measure item, then format the measure item values in blue underlined text.
3. Else if a drilldown view is defined for the Measure Items axis, then format the measure item values in blue underlined text.

Note: Blue underlined formatting is not applied to any images or indicators displayed for measure items.

Priority for Pop-up Label Text

1. If a pop-up label is defined for the measure item, then display pop-up label text.
2. Else if a hyperlink is defined for the measure item, then display the hyperlink.
3. Else if a drilldown view is defined for the Measure Items axis, then display the text 'Drill To' followed by the name of the drilldown view.

Note: If none of the above properties are used, there won't be a pop-up label when you hover over the measure item in the grid.

Example 1

The marked measure item in this view has a conditional format and hyperlink defined for it. Sales after returns that are less than \$15,000 display in red, bold text based on the conditional format rules. Since the conditional formatting takes precedent over the hyperlink formatting, there is no visual cue to the user that a hyperlink has been defined for this measure item. However, when the user hovers over the measure item cell, the cursor will change to a link. If you were to remove the conditional format (see second image), then all values for that measure item would display as blue underlined text because of the hyperlink defined for it.

View Name: Sales vs Returns

View Filter Months

Year Based >>		Last Year	Current Year	Grand Total
Product	Year Based Months Based-Year Based-Abs Year	2013	2014	
620A914001	Sales Amount	\$16,149	\$9,513	\$25,661
	Return Amount	(\$1,023)	(\$965)	(\$1,989)
620A914002	Sales after Returns	\$10,029	\$5,674	\$15,702
	Sales Amount	\$30,820	\$34,138	\$94,957
	Return Amount	(\$3,797)	(\$3,717)	(\$7,515)
620A914003	Sales after Returns	\$57,022	\$30,420	\$87,443
	Sales Amount	\$34,547	\$20,521	\$55,069
	Return Amount	(\$1,705)	(\$1,788)	(\$3,493)
620A914004	Sales after Returns	\$32,842	\$18,733	\$51,575
	Sales Amount	\$45,228	\$25,353	\$70,581
	Return Amount	(\$5,674)	(\$5,206)	(\$10,880)
620A914008	Sales after Returns	\$39,554	\$20,147	\$59,701
	Sales Amount	\$21,366	\$12,838	\$34,204
	Return Amount	(\$1,194)	(\$1,256)	(\$2,450)
620A914015	Sales after Returns	\$20,172	\$11,582	\$31,754
	Sales Amount	\$34,452	\$19,834	\$54,286
620A914016	Return Amount	(\$1,572)	(\$1,424)	(\$2,996)

Tracking sales after returns. Green icon is >= \$50K. Yellow icon is >= \$15K. Red icon and text is < \$15K.

View Explorer

- Sales vs Returns
 - Parameter Groups
 - Grid
 - Rows
 - Columns
 - View Filter
 - Measure Items
 - Sales Amount
 - Return Amount
 - Sales after Returns
 - Presentation
 - Charts

Properties - Sales after Returns

Name	Data3
Caption Expression	Sales after Returns
Type	Calculated
Expression	[Measures].[Data1 (Sales /
Format String	\$\$,###,##0
Value	Yes
Image	No
Conditional Format	Yes Monitor Sales afte
Pop-up Expression	Yes "Tracking sales af
Hyperlink	Yes "http://www.silvon

Here is the measure item formatting after the conditional format was removed.

View Name: Sales vs Returns				
View Filter Months				
Year Based >>		Last Year	Current Year	Grand Total
Product	Year Based Months Based-Year Based-Abs Year	2013	2014	
620A914001	Sales Amount	\$16,149	\$9,513	\$25,661
	Return Amount	(\$1,023)	(\$965)	(\$1,989)
	Sales after Returns	<u>\$15,125</u>	<u>\$8,547</u>	<u>\$23,673</u>
620A914002	Sales Amount	\$10,633	\$6,243	\$16,876
	Return Amount	(\$604)	(\$570)	(\$1,173)
	Sales after Returns	<u>\$10,029</u>	<u>\$5,674</u>	<u>\$15,702</u>
620A914003	Sales Amount	\$60,820	\$34,138	\$94,957
	Return Amount	(\$3,797)	(\$3,717)	(\$7,515)
	Sales after Returns	<u>\$57,022</u>	<u>\$30,420</u>	<u>\$87,443</u>
620A914004	Sales Amount	\$34,547	\$20,521	\$55,069
	Return Amount	(\$1,705)	(\$1,788)	(\$3,493)
	Sales after Returns	<u>\$32,842</u>	<u>\$18,733</u>	<u>\$51,575</u>
620A914008	Sales Amount	\$45,228	\$25,353	\$70,581
	Return Amount	(\$5,674)	(\$5,206)	(\$10,880)
	Sales after Returns	<u>\$39,554</u>	<u>\$20,147</u>	<u>\$59,701</u>
620A914015	Sales Amount	\$21,366	\$12,838	\$34,204
	Return Amount	(\$1,194)	(\$1,256)	(\$2,450)
	Sales after Returns	<u>\$20,172</u>	<u>\$11,582</u>	<u>\$31,754</u>
620A914016	Sales Amount	\$34,452	\$19,834	\$54,286
	Return Amount	(\$1,572)	(\$1,424)	(\$2,996)

Example 2

The marked measure item in this view has a pop-up label defined for it. There is also a drilldown view defined via the Measure Items axis. The pop-up label text for the marked measure item is the text from the executed pop-up label expression. For other measures items that don't have a pop-up label defined, the name of the drilldown view shows in the pop-up label (see second image).

The screenshot shows a data grid with columns: Product, Actual Sales Amount Jan 2014 to Sep 2014, Returns Amount Jan 2014 to Sep 2014, Ext Actual Cost Jan 2014 to Sep 2014, and Gross Margin Amount Jan 2014 to Sep 2014. A red circle highlights a row for 'Pear Slcs LS 12 oz BR* 0A' with a Gross Margin of \$5,304. A pop-up label is displayed over this row, containing the text: 'Gross Margin is \$5,304. Green arrows indicate margins above \$10,000. Yellow arrows indicate margins between \$5,000 and \$10,000. Red arrows indicate margins below \$5,000.' The 'View Explorer' on the right shows the hierarchy: Product Sales, Returns, Margins > Grid > Rows > Columns > View Filter > Measure Items > Gross Margin Amount Jan 2014 to Sep 2014. The 'Properties - Gross Margin Amount Jan 2014 to Sep 2014' window shows the 'Pop-up Expression' set to 'Gross Margin is " + #Meas...

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	\$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	\$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	\$7,732
FrtCktail HS 12 oz BR* 0A	\$20			
Pear Slcs LS 12 oz BR* 0A	\$25			
Peach Hlvs LS 12 oz BR* 0A	\$12			
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	\$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	\$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	\$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	\$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	\$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	\$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	\$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	\$2,444
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	\$7,829
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	\$32,383
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	\$1,289
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	\$1,877
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	\$14,192
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	\$12,439

Here is the pop-label text for all other measure items, which do not have pop-up labels or hyperlinks defined for them. The name of the drilldown view for the Measure Items axis displays.

The screenshot shows the same data grid as above. A red circle highlights a row for 'Peach Hlvs LS 12 oz BR* 0A' with a Gross Margin of \$3,785. A pop-up label is displayed over this row, containing the text: 'Drill To Rolling 24 Week Sales by RepBroker'. The 'View Explorer' on the right shows the hierarchy: Product Sales, Returns, Margins > Grid > Rows > Columns > View Filter > Measure Items > Gross Margin Amount Jan 2014 to Sep 2014. The 'Properties - Measure Items' window shows the 'Drilldown View' set to 'Rolling 24 Week Sales by RepBroker'.

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	\$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	\$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	\$7,732
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	\$5,099
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	\$3,909
Peach Hlvs LS 12 oz BR* 0A	\$9,033			\$3,785
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	\$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	\$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	\$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	\$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	\$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	\$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	\$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	\$2,444

Frequently Asked Questions (FAQ's)

Can I use Global Views as Drilldown Views for Any Type of View?

Yes. Global views may be used as drilldown views for global, personal, or shared views.

Can I use Personal Views as Drilldown Views for Any Type of View?

Yes. Personal views may be used as drilldown views for global, personal, or shared views.

Can I use Shared Views as Drilldown Views for Any Type of View?

Yes. Shared views may be used as drilldown views for global, personal, or other shared views.

Definitions

Global, Personal, and Shared Objects

Several types of objects in this application can be set up with either global, personal, or shared designations. Views fall into that category. Also, user lists, user links, actions, and conditional formats can be either global or personal but not shared. This designation is a means of controlling which users can use the objects and save edits to the objects. View and security administrators can change the owner of any view, user list, conditional format, or action.

- **Global Objects** - can be used by all users. Administrators can create global objects. For example, an administrator creates a global view and enables it for the view groups of other users. Those users will be able to see the global view in their left panel and run the view. They cannot change the global view definition. If they make edits to the global view and want to save them, they can perform a Save As to create a shared or personal copy of the view.
- **Personal Objects** - can be used by all users but only edited by object owners. For example, a user with an advanced level of access in the application can filter a view using another user's personal user list but cannot maintain that user list.
- **Shared Views** – can be created or used by any type of user. Anyone with access to the view group to which the view belongs will see the shared view in their left panel. A shared view is a collaborative view for use within a group or department, but does not need to be managed by a Viewer administrator.