



Working with Parameters

Stratum.Viewer 6

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Getting Started

Access to Parameters

Your user profile level controls what you can do with parameters.

User Profile Level	Add	Edit	Delete	Run Views with Parameters
Casual	✗	✗	✗	✓
Advanced	✓	✓	✓	✓
View Administrator	✓	✓	✓	✓
Security Administrator	✓	✓	✓	✓

Introduction to Parameters

Attaching parameters to levels in a view gives users the power to choose which members will display in the view prior to its execution. When users run a view defined with parameters, the [View Prompt window](#) will display and prompt users to select values for the impacted levels. You also can set up views such that users are prompted to select the presentation format before the view runs. Setting that property to Yes will display a Presentation section in the View Prompt window. Users can choose to run the view in the traditional grid format or to have view results open in an MS Excel file.

A single parameter group with up to four types of parameters each can be defined for each level in the view. The types of parameters available are:

- **Select Members** - users will click a filter icon, which opens the [Select](#) or [Advanced Select Members](#) window. They can search for and select one or more members.
- **User List** - users will click a filter icon, which opens the Select User List Filter window. They can choose a user list that determines the members to display for the level.
- **Drop Down** - users will select a member from a drop-down list.
- **Expression** - users will click a filter icon to open the Expression window. They can set up an expression to determine the members that will display for a level.

You have the flexibility to make parameters required or optional and to set up a pre-defined value for some parameters that users can either accept or override by making a different selection. Stratum.Viewer role security is applied when users select values for a parameter.

The following view is shown in the definition stage. The user who is setting up the view has defined parameter groups for the RepBroker Type and Product Category levels. The first group is required. This means the user will need to select a parameter value for the RepBroker Type level before the view will be executed. The user also set the Presentation properties of Type to Viewer and Prompt to Yes. The user who runs the view can either leave the view set to run in the Viewer mode, which is the grid format, or can change the Presentation option to Excel to see results in an MS Excel file.

The screenshot displays a software interface for defining a view. The main area shows the view name "Sales Cost Trends Last 3 Yrs" and a "Run View" button. On the right, the "View Explorer" pane shows a tree structure:

- Sales Cost Trends Last 3 Yrs
 - Parameter Groups
 - RepBroker Type Group (highlighted)
 - Product Category Group
 - ProdCatUserListParameter
 - ProdCatMemberParameter
 - Grid
 - Rows
 - Product Category
 - Product Family
 - Product Brand
 - Columns
 - RepBroker Type
 - View Filter

Below the View Explorer is the "Properties - RepBroker Type Group" pane, which contains the following table:

Name	RepBroker Type Group
Dimension	RepBroker
Hierarchy	RepBroker Type
Level	RepBroker Type
Required	Yes

Here is the View Prompt window that displays when a user runs the view.

The screenshot shows a dialog box titled "VIEW PROMPT" with a close button (X) in the top right corner. The main title of the dialog is "Sales Cost Trends Last 3 Yrs - Parameters".

Under the "Parameters" section, there are two groups of options:

- RepBroker Type Group:** A radio button is selected next to "Choose a RepBroker Type:", followed by a text input field with a dropdown arrow.
- Product Category Group:** A radio button is selected next to "Choose Product Category members:", followed by a text input field with a red "Y" icon to its right. Below this, another radio button is next to "Apply a User List Filter to Level:", followed by a greyed-out text input field with a red "Y" icon to its right.

At the bottom of the dialog, there is a "Presentation" section with a "Type:" label and a dropdown menu currently showing "Viewer".

At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

The user chooses the Direct member for the first parameter group, which is required, and skips choosing values for the other parameter group. The user leaves the Presentation type set to Viewer.

VIEW PROMPT [X]

Sales Cost Trends Last 3 Yrs - Parameters

RepBroker Type Group

Choose a RepBroker Type: [v]

Product Category Group

Choose Product Category members: [Y]

Apply a User List Filter to Level: [Y]

Presentation

Type: [v]

[OK] [Cancel]

Here is the executed view, with the RepBroker Type level filtered by the selected member. Results show in the grid format. If the user had selected Excel in the Presentation section of the View Prompt window, then view results would have opened as an MS Excel worksheet.

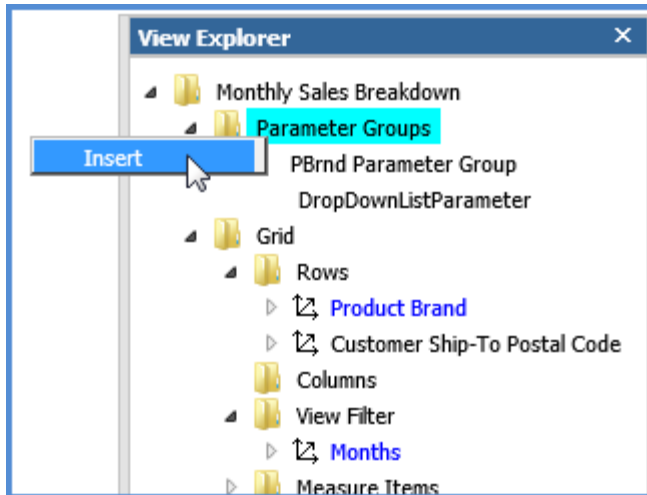
		Direct				Grand Tot
<u>Product Category</u>	RepBroker Type >> Filtered With Members: Direct	AS Sales Units Q1 2011 to Q4 2014	AS Freight Cost Q1 2011 to Q4 2014	AS Ext Handling Cost Q1 2011 to Q4 2014	Daily Sales Units Q1 2011 to Q4 2014	AS Sales Ur Q1 2011 t Q4 2014
Fresh Vegetables	Tender Vegetables	13,140,522	\$8,495,075	\$13,270,731	371,298	13,140,
	Hardy Vegetables	10,072,068	\$5,505,768	\$5,523,893	246,206	10,072,
	Fresh Vegetables Total	23,212,590	\$14,000,843	\$18,794,624	617,504	23,212,
Canned Fruit	Fruit Fillings	24,568,695	\$45,188,094	\$16,610,523	571,996	24,568,
	Applesauce	16,896,653	\$32,577,642	\$13,094,409	347,871	16,896,
	Specialty Canned Fruit	15,183,378	\$35,583,255	\$9,082,694	314,629	15,183,
	Fruit Cocktail	24,509,294	\$51,857,318	\$17,293,682	431,029	24,509,
	Peaches	30,557,762	\$65,459,221	\$18,964,542	669,705	30,557,
	Pears	15,649,144	\$34,131,554	\$10,753,212	291,876	15,649,
	Pineapple	21,407,661	\$37,865,705	\$13,807,972	359,621	21,407,
	Canned Fruit Total	148,772,588	\$302,662,788	\$99,607,034	2,986,726	148,772,
Pork	Fresh Pork	6,848,293	\$5,621,945	\$7,726,962	202,583	6,848,
	Pork Total	6,848,293	\$5,621,945	\$7,726,962	202,583	6,848,
Beef	Fresh Beef	6,680,442	\$5,043,259	\$6,052,966	165,394	6,680,
	Beef Total	6,680,442	\$5,043,259	\$6,052,966	165,394	6,680,

Quick Start - Adding Parameters

Here are the key steps for adding parameters. You need to set up a parameter group and then add parameters to it.

1

Right-click the **Parameter Groups** folder in view explorer and click **Insert**.



2

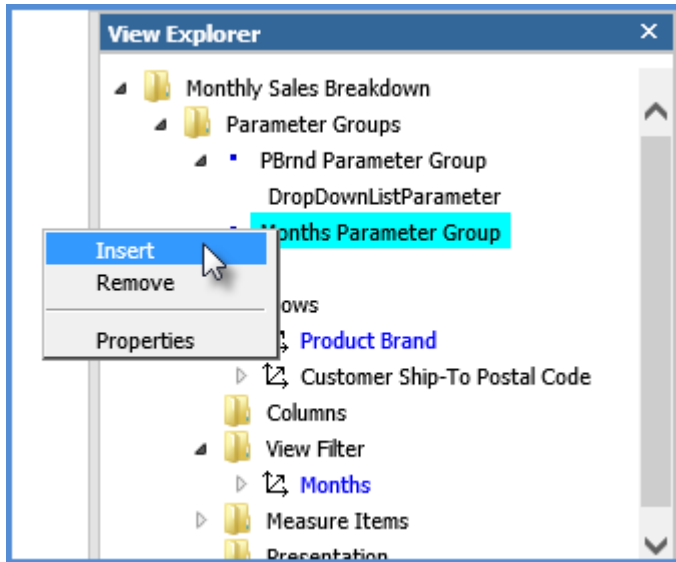
Set up the parameter group [properties](#).

Properties to set up include specifying whether users will be required to use a parameter from this group when they run the view and are presented with the [View Prompt window](#).



3

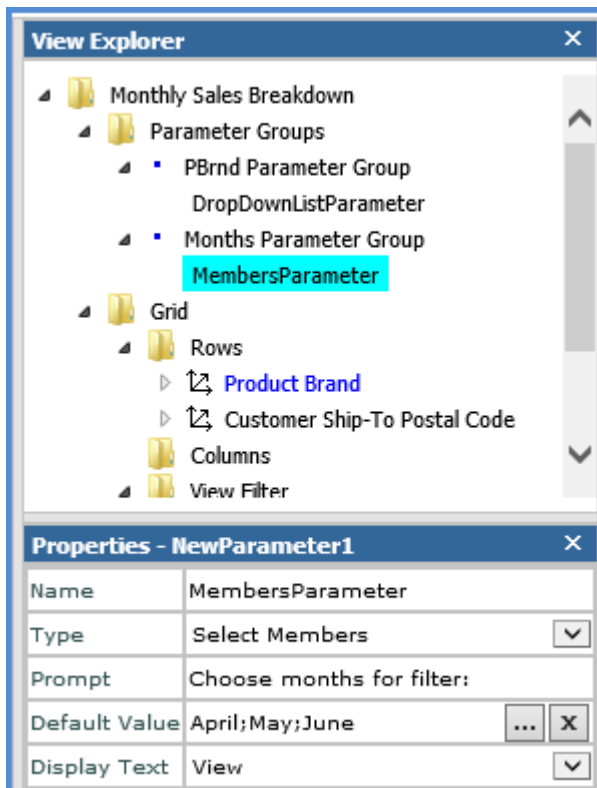
Right-click the parameter group name, and select Insert.



4

Set up the properties for the parameter.

Properties to set up include the parameter type (members, user list, drop down, expression), prompt text, and optionally a default parameter value.



5


Repeat Steps 3 and 4 to add additional types of parameters to the group.

Tasks

Add a Parameter

1. If you haven't done so already, add a parameter group to which the parameter will belong.
2. Right-click the parameter group, and click Insert.
3. Enter a name for the parameter in the [properties window](#) that displays.
4. Select a parameter type, either Select Members, User List, Drop Down, or Expression.
5. Enter a text prompt that instructs the user what to do with the parameter. For example, you could enter text such as *Choose a user list:* for a user list parameter.
6. {Optional} Customize the Display Text property for the parameter. See [How Parameter Display Text Interacts with Other Settings](#) for more details and examples.
 - **View** – This is the default Display Text selection for all parameter types. Setting this to view means that you want the applicable drop-down list or Select/Advanced Select Members windows for the parameter to display based on the display text setting for the associated level in the view.
 - **Value or Attribute Relationship** – Setting the Display Text to a specific attribute (either value or attribute relationship) means that you want the applicable drop-down list or Select/Advanced Select Member windows for the parameter to display using the selected attribute.

Note: Administrative settings in the Select Members Options window can override the parameter Display Text property.

7. Click the Browse button  to specify a default value for the parameter. Use the filtering window that displays to choose a default member(s), user list, or expression.

Note: Specifying a default parameter is optional in most cases. It is required if you did not enter a prompt in Step 5.

8. {Optional} Repeat Steps 2 to 7 to add other types of parameters to the group.

Add a Parameter Group

1. Right-click the Parameter Groups folder in view explorer, and select Insert.
2. Enter a name for the group in the [properties window](#) that displays.
3. Select the hierarchy and then level for the group.
4. Use the Required property to determine if users will be required to specify a parameter for the group when they run the view and are presented with the View Prompt window.
 - Yes will require a parameter to be specified.
 - No will allow users to bypass specifying a parameter for the group.
5. You can now add one or more parameters to the group. See [Add a Parameter](#).

Delete a Parameter Group or Parameter

1. In [view explorer](#), right-click the parameter group or parameter.
2. Select the Remove option.

Edit a Parameter

1. In [view explorer](#), navigate to the parameter group for the parameter.
2. Right-click the parameter, and select Properties.
3. Change properties such as the name, prompt, or default value in the [properties window](#).

Note: If you need to edit the order of parameters within a group, use drag and drop in view explorer.

Edit a Parameter Group

1. Right-click the parameter group in [view explorer](#), and select Properties.
2. Change properties in the [properties window](#) that displays.



Note: If you need to add or edit parameters within a group, see [Edit a Parameter](#) or [Edit the Order of Parameter Groups or Parameters](#).

Edit the Order of Parameter Groups or Parameters

Use drag and drop to edit the order of parameter groups and order of parameters within each group. This can be done in [view explorer](#). Dropping one group onto another will position the dropped grouped after that other group. Dropping a parameter on another will position the dropped parameter after that other parameter.

Run a View with Parameters

A [View Prompt window](#) displays when you run a view that has parameters:

1. Select a parameter for a parameter group.
2. Choose a value(s) using the provided drop-down list or filter icon.
 - There will be a drop-down list for Drop Down parameters. Select a member.
 - There will be a filter icon for other parameter types:
 - **Select Members** - icon opens the [Select](#) or [Advanced Select Members window](#). Search for and select one or more members then click OK.
 - **User List** - icon opens the Select User List Filter window. Use the search or filter  tools as aids in finding a list. Optionally click Show Details  after selecting a list to see more information about it before applying it as a filter. Click OK to apply the selected list as a filter.
 - **Expression** - icon opens the Expression window. Set up an expression and click OK.
3. The selected value(s) will display in the parameter field.
4. Repeat Steps 1 and 2 for any additional parameters groups that display in the window.
5. If there is a Presentation section in the View Prompt window, select the type of format to run view results in -- either Viewer or Excel.
6. Click OK.

OR

1. If default values already display in a parameter's field, you can run the view with the defaults by selecting that parameter for its group and clicking OK. Once you make selections for a parameter, the filter selections you made will display in the parameter's field the next time you reopen the window. Running the view from the left panel resets the window to its default values.

Advanced Select Members Window

ADVANCED SELECT MEMBERS: UPC GLOBAL NUMBER

apple x Q Search By: UPC Long Description Starts with

UPC Long Description ▲	UPC Global Number	UPC ABC Classification
<input type="checkbox"/> Apple Filling 106oz BR*	0 - 24000 - 12422 - 4	B
<input type="checkbox"/> Apple Filling 106oz PL*	0 - 24000 - 12529 - 4	A
<input type="checkbox"/> Apple Filling 12oz BR*	0 - 24000 - 12522 - 4	B
<input type="checkbox"/> Apple Filling 12oz PL*	0 - 24000 - 12429 - 4	A
<input type="checkbox"/> Apples Red Delicious	0 - 39484 - 92837 - 1	B

1 to 5 of 5 |<< 1 >>|

Add Add All

UPC Long Description ▲	UPC Global Number	UPC ABC Classification
<input type="checkbox"/> Applesauce 106oz BR*	0 - 24000 - 12430 - 4	A
<input type="checkbox"/> Applesauce 106oz PL*	0 - 24000 - 12431 - 4	A
<input type="checkbox"/> Applesauce 12oz BR*	0 - 24000 - 12530 - 4	A
<input type="checkbox"/> Applesauce 12oz PL*	0 - 24000 - 12531 - 4	A

1 to 4 of 4 |<< 1 >>|


Clear Clear All 4 Selected

OK Cancel More... Help

1

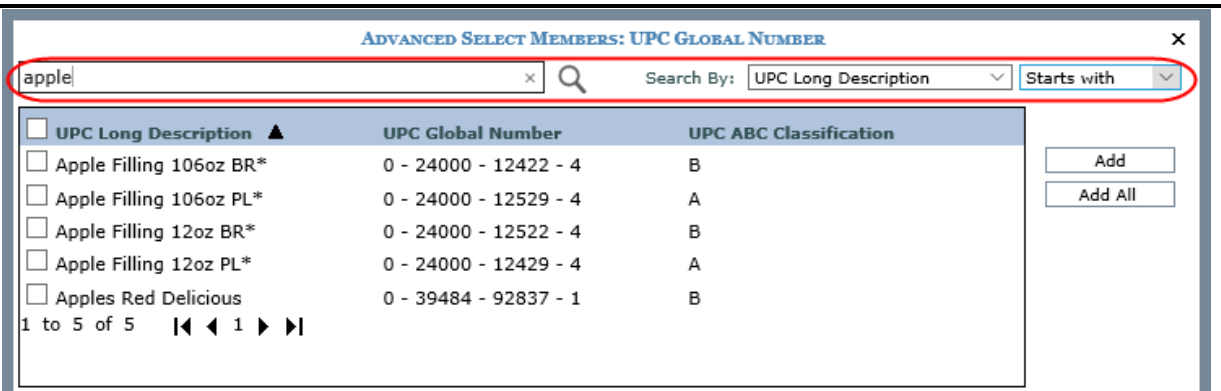
Use the search properties to specify the criteria and the parameters by which to search for members to be used in the member list. That list can be used as a level filter, to create a user list, or to help build an expression.

Note: The window also is used when administrators set up roles.

Click the search icon  after you specify your search properties:

- Enter a value in the search field. Multiple values can be entered by separating them with a semicolon. If the field is left blank, the available list displays all members for the active level.
- Optionally use the Search By drop-down lists. The first list is to select the attribute relationship to perform the search on. The other list lets you choose whether you want your search to contain, not contain, start with, be equal to, not equal to, greater than, or less than the value(s) specified in the search.

In the following example, we searched for UPC long descriptions starting with “apple” and 5 items were retrieved.



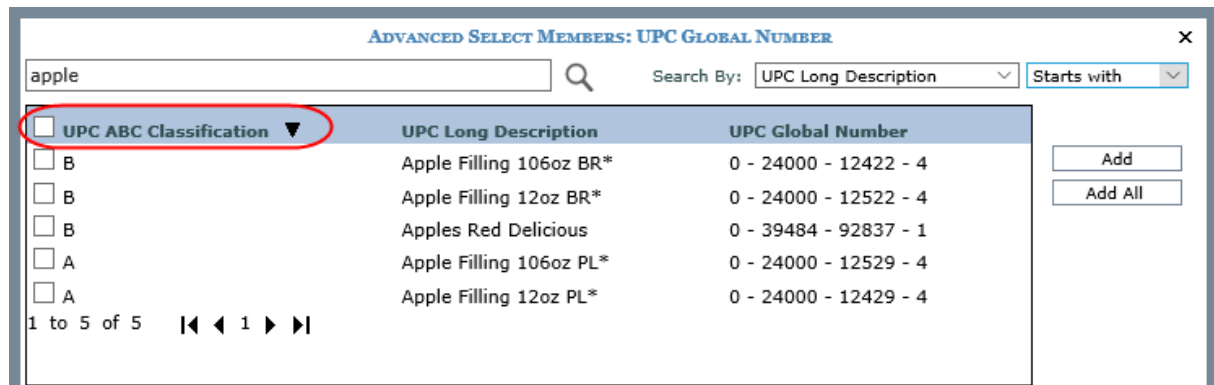
2

Available Selection list – The list area displays members returned by your search. Click checkboxes next to members then click Add to move the selected members to the bottom portion of the window. Click OK when you are done making various member selections.

Other options and tips:

- Selecting members in the top portion of the window then clicking OK will add the selected members to a filter and close the window.
- Click the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).
- Click Add All to add all of the available members, from all pages, to the selected list in the bottom portion of the window.

Columns in this area are sort and drag/drop enabled. In the following example, we clicked the UPC ABC Classification column and dragged it to the first position. We also clicked the Sort icon and changed the sort from ascending to descending.



Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

3

Selected list - displays the members selected for the member list. A count under the Clear All button indicates how many members are included in the member list filter.

To clear members, click checkboxes next to members you want to remove from the filter and then click Clear when you are done making selections.

Other options and tips:

- Use the checkbox in the heading area to select or deselect all members on all pages in the list

at once.

- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).
- Click Clear All to clear all of the members, from all pages of the selected list.

In the following example, there are four items in the filter and two have been selected with the intention of clearing them. After the Clear button is clicked, the filter will contain only two items.

The screenshot shows a window with a table of items. The table has three columns: 'UPC ABC Classification', 'UPC Long Description', and 'UPC Global Number'. There are four rows, each with a checkbox in the first column. The second and fourth rows are selected (checkboxes are checked). To the right of the table are two buttons: 'Clear' and 'Clear All'. Below these buttons, it says '4 Selected'. At the bottom of the window are buttons for 'OK', 'Cancel', 'More...', and 'Help'. Below the table, there is a pagination control showing '1 to 4 of 4' and navigation arrows.

<input type="checkbox"/>	UPC ABC Classification ▼	UPC Long Description	UPC Global Number
<input type="checkbox"/>	A	Applesauce 106oz BR*	0 - 24000 - 12430 - 4
<input checked="" type="checkbox"/>	A	Applesauce 106oz PL*	0 - 24000 - 12431 - 4
<input type="checkbox"/>	A	Applesauce 12oz BR*	0 - 24000 - 12530 - 4
<input checked="" type="checkbox"/>	A	Applesauce 12oz PL*	0 - 24000 - 12531 - 4

Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

4

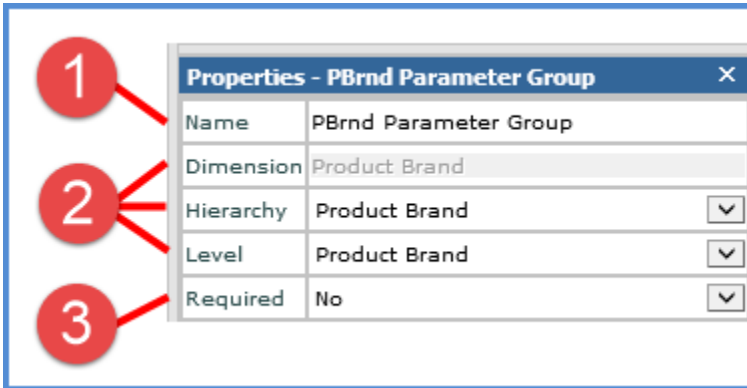
More... -- Click the More button for additional features:

- **Change Filter Type** – Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).
- **Clear Filter** – Click as a shortcut to clearing the filter from the level.
- **Basic Select** – Click to access the Select Members window. This option may not display depending on administrative settings for the level. Administrators determine which version(s) of the window are available by dimension.
- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Advanced Select Members window.
- **Paste** – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building.

The screenshot shows a 'More...' menu with the following options: 'Change Filter Type', 'Clear Filter', 'Basic Select', 'Display Options', and 'Paste'. Below the menu are two buttons: 'Cancel' and 'More...'. A mouse cursor is pointing at the 'More...' button.

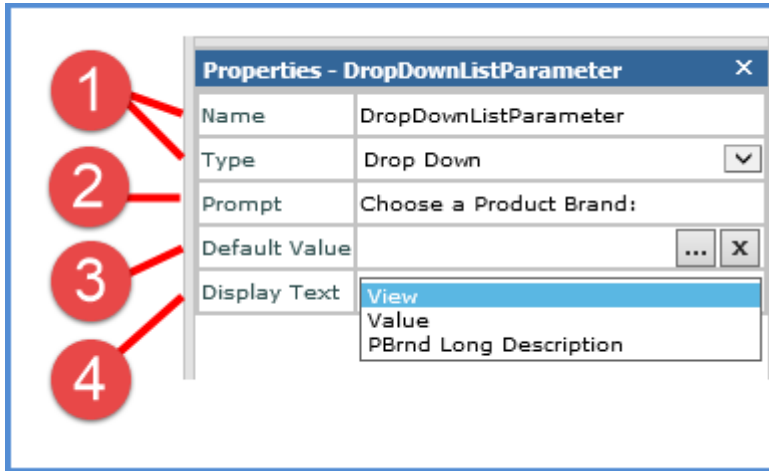
Properties Windows for Parameter Groups and Parameters


Parameter Groups



1	Name – Use to customize the name of a parameter group. Each group requires a unique name. The name will display above the group in the View Prompt window .
2	Dimension, Hierarchy, and Level - Dimension field is read-only and is updated as you make your Hierarchy selection. If a Hierarchy has more than one level, choose the level for the parameter group using the Level drop-down list.
3	Required - If you want users of the view to be required to specify parameter values for the group before they can run the view, leave Required set to Yes. Otherwise you can change it to No and users will be able run the view without specifying any parameter values for the group.

Parameters



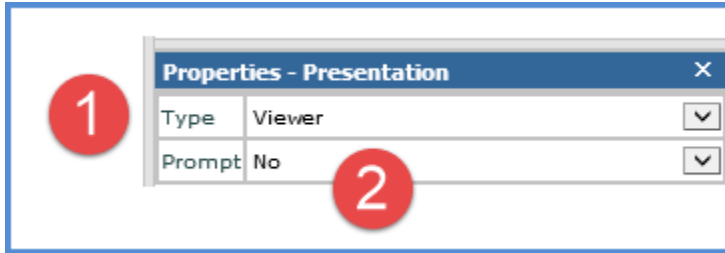
<p>1</p>	<p>Name – Use to customize the name of a parameter. Each parameter across all parameter groups for the view requires a unique name. Don't use any spaces in the name.</p> <p>Type - Select the type of parameter. You can create up to four parameters per parameter group, one of each type.</p> <ul style="list-style-type: none"> • Select Members - this type creates a filter icon in the View Prompt window. The user can click it to access the Select or Advanced Select Members window. They can search for and select multiple members as the parameter value. • Drop Down - this type creates a drop-down list in the View Prompt window. The user can select one member as the parameter value. • User List - this type creates a filter icon in the View Prompt window. The user can click it to access the Select User List Filter window and select a user list as the parameter value. • Expression - this type creates a filter icon in the View Prompt window. The user can click it to access the Expression window and set up an expression for the parameter value.
<p>2</p>	<p>Prompt - Enter a text prompt that instructs the user what to do with the parameter. The prompt will display next to the parameter's radio button in the View Prompt window. For example, you could enter text such as <i>Choose a user list:</i> for a user list parameter.</p> <hr/> <p>Note: In order to activate a parameter and have it display in the View Prompt window, you need to enter a prompt. If you don't enter a prompt, you are required to specify a default value.</p>
<p>3</p>	<p>Default Value - You have the option of specifying a default value for each parameter. The value displays in the View Prompt window where the user can either accept it or override it by choosing a different parameter value.</p> <ul style="list-style-type: none"> • Click the Browse button  to set up a default. The window that opens depends on the type of parameter. For example, the Select or Advanced Select Members window opens for a Select Members parameter. • Click the "X" button to remove a default value from the parameter.
<p>4</p>	<p>Display Text – You have the option of customizing the Display Text property for the parameter. See How Parameter Display Text Interacts with Other Settings for more details and examples.</p> <ul style="list-style-type: none"> • View – This is the default Display Text selection for all parameter types. Setting this to view means that you want the applicable drop-down list or Select/Advanced Select Members windows for the parameter to display based on the display text setting for the associated level in

the view.

- **Value or Attribute Relationship** – Setting the Display Text to a specific attribute (either value or attribute relationship) means that you want the applicable drop-down list or Select/Advanced Select Member windows for the parameter to display using the selected attribute.

Note: Administrative settings in the Select Members Options window can override the parameter Display Text property.

Properties Window for Presentation



1	Type – Controls what presentation format a view runs in by default. Set to Viewer for the view to display in the traditional grid format. Set to Excel to have the view open as an MS Excel file.
2	Prompt – Use to set up the view such that users will be prompted to choose the presentation format for displaying view results each time they run the view. This is done by setting the Prompt property to Yes. The View Prompt window will display each time users run the view, and they can use the Presentation section in that window to choose the presentation format. If the option is No, the view will run in the format you selected for the Type property without any prompt.

Select Members Window

1 6 Selected

Search By: UPC ABC Classification Contains

UPC ABC Classification	UPC Long Description	UPC Commodity Code
<input type="checkbox"/>	Asparagus	2450
<input type="checkbox"/>	Strawberries	4850
<input checked="" type="checkbox"/>	Orange Juice Conc.	5230
<input type="checkbox"/>	Blueberry Filling 106oz PL*	5110
<input type="checkbox"/>	Grapefruit Sctn UnS 106oz BR*	5110
<input checked="" type="checkbox"/>	Mand Org Pcs 106oz BR*	5110
<input type="checkbox"/>	Blueberry Filling 106oz BR*	5110
<input checked="" type="checkbox"/>	Mand Org Pcs 12oz PL*	5110
<input type="checkbox"/>	Blueberry Filling 12oz PL*	5110
<input type="checkbox"/>	Grapefruit Sctn UnS 12oz BR*	5110
<input checked="" type="checkbox"/>	Mand Org Pcs 12oz BR*	5110
<input type="checkbox"/>	Blueberry Filling 12oz BR*	5110
<input checked="" type="checkbox"/>	Mand Org Pcs 106oz PL*	5110
<input checked="" type="checkbox"/>	Navel Oranges	3160
<input type="checkbox"/>	Pork Chops - Butterfly	3347
<input type="checkbox"/>	Ground Round 90% Lean	3347
<input type="checkbox"/>	Sweet Onions, Chopped	9999


3 Clear All **4** OK Cancel More... Help

1

The 'Selected' count in the upper left corner shows how many members are included in the filter. The count adjusts as you change selections in the window.

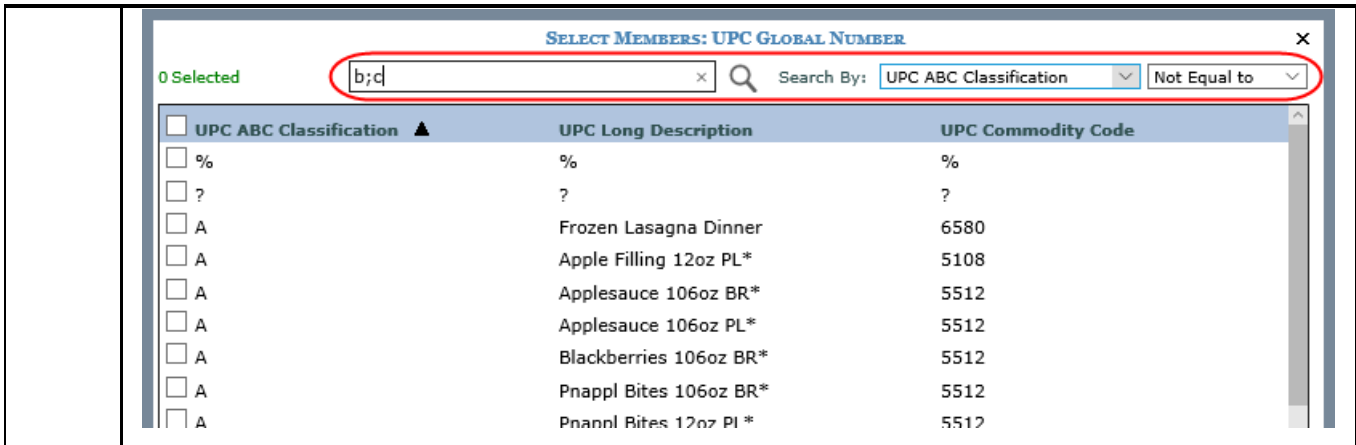
This window is initially populated with all authorized members for the active level. Make selections from the entire list, or execute a search to narrow down the list. Use the search properties to specify the criteria and the parameters by which to search for members to be used in a member list filter or user list.

Note: The window is also used when selecting members from the expression window for calculated measure items and when administrators set up roles.

Click the search icon  after you specify your search properties:

- Enter a value in the search field. Multiple values can be entered by separating them with a semicolon. If the field is left blank, the available list displays all members for the active level.
- Optionally use the Search By drop-down lists. The first list is to select the attribute relationship to perform the search on. The other list lets you choose whether you want your search to contain, not contain, start with, be equal to, not equal to, greater than, or less than the value(s) specified in the search.

In the following example, we searched for UPC ABC Classification not equal to "b or c".



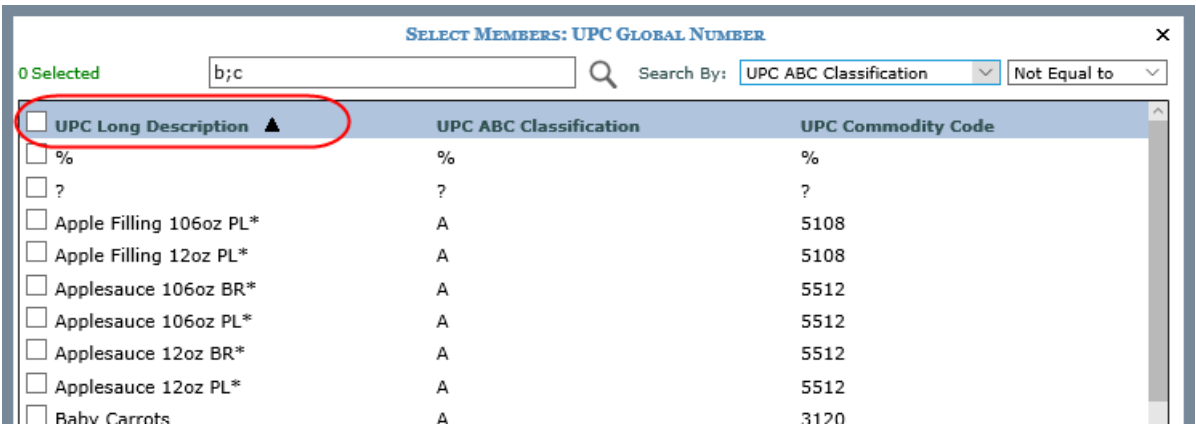
2

Available Selection list – Use this list to select the members to include in a member list filter, expression, etc. Click the checkboxes next to members or click anywhere in member rows to select or deselect members. Click OK when you are done making various selections to apply your filter.

Other options and tips:

- If your search returns only one member, the member will display as selected. At that point, you can click the OK button to close the window and add that member to a filter.
- Selecting members then clicking OK will add the selected members to a filter and close the window.
- Click the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).

Columns in this area are sort and drag/drop enabled. In the following example, we clicked the UPC Long Description column and dragged it to the first position. We also clicked the Sort icon to perform the sort on that column in ascending order.



Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

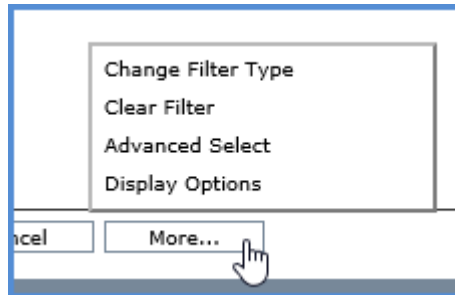
3

Clear All – Click this button to clear all member selections from a filter. The window remains open so you can make new selections.

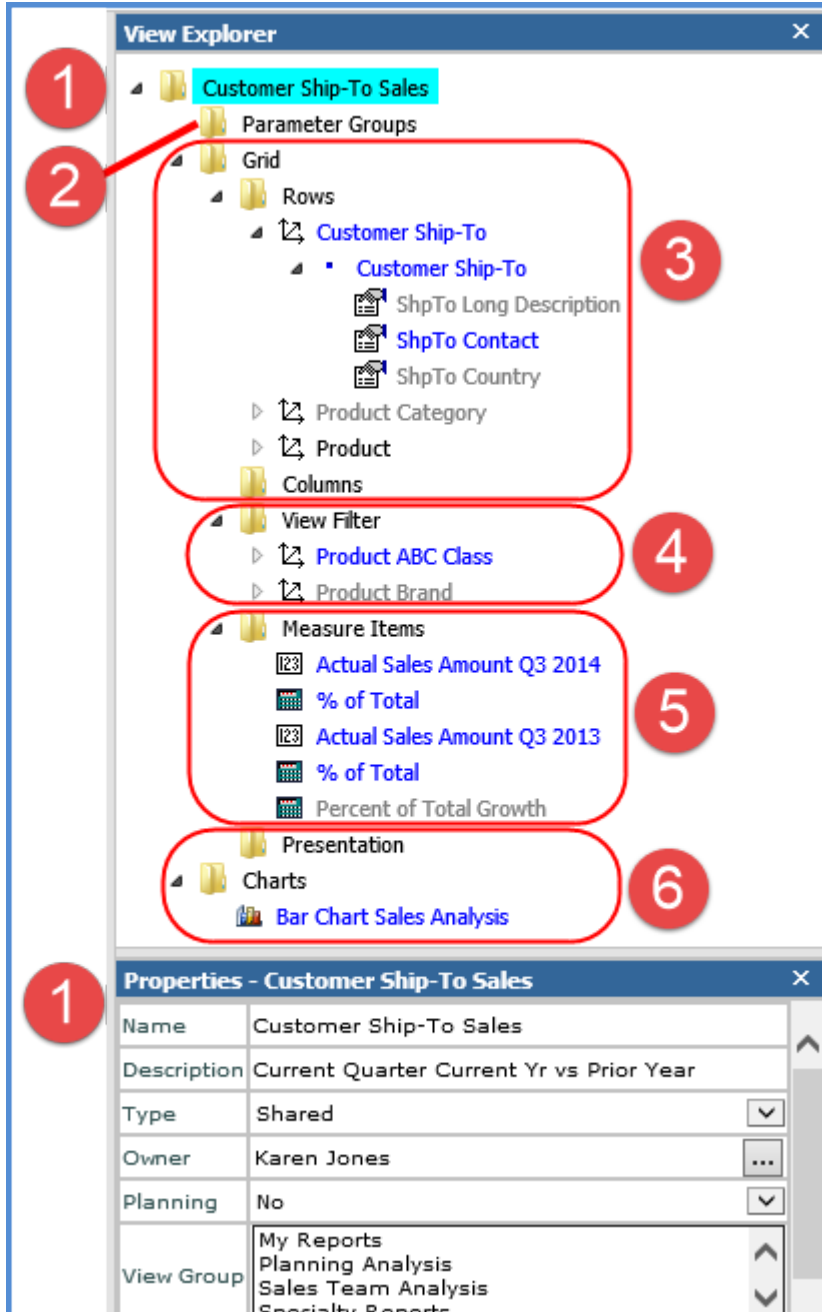
More... -- Click the More button for additional features:

4

- **Change Filter Type** –Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).
- **Clear Filter** – Click as a shortcut to clearing the filter from the level.
- **Advanced Select** – Click to access the Advanced Select Members window if you prefer to use that advanced version of the window to search for, select, or clear. The advanced window is helpful when working with levels for which a large amount of members exist.
- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Select Members window.



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.

1	<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, View Group properties, and when the view was last used or updated. Administrators can use the Owner property to change the owner of a view.</p>
2	<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>
3	<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 the display of totals and All Others value defaults, 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.
4	<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>
5	<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.
6	<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.

View Prompt Window

<p>1</p>	<p>Parameter Groups - You can distinguish each parameter group that exists for a view by the bold name above each group. In this example, there is a group named "RepBrokerType Group" for the RepBroker Type level, and a group named "Product Category Group" for the Product Category level. Each group has its own set of parameters and one parameter per group can be used to filter its respective level in the view.</p>
<p>2</p>	<p>Individual Parameters - Parameters in each group have their own radio buttons. Select one to activate that parameter and then specify a value for it (see 3 below). If a default value is associated with a parameter, the value will display in the field next to the parameter. You can leave a parameter set to the default or choose a different value.</p>
<p>3</p>	<p>Specifying Parameter Values - Select a parameter's radio button then use the control provided to specify values. The View Prompt window will default to the last selected filter selections each time you reopen the window. Running the view from the left panel resets the window to its default values.</p> <ul style="list-style-type: none"> • Drop Down parameters have a drop-down list. A single member can be selected. • Member List, User List, and Expression parameters have a filter icon next to them. Click the icon and use the window that opens to specify the member(s), user list, or expression for the parameter value. You will use the Select or Advanced Select Members window for Member List parameters, Select User List Filter window for User List parameters, and Expression window for Expression parameters. Clicking OK in the filtering window returns the specified member(s),

	user list, named set, or expression to the parameter's field in the View Prompt window.
4	Presentation – This section only displays if you selected the Yes option for the Presentation section's Prompt property. Users can choose to run the view in Viewer (grid) format or as an MS Excel file. If they aren't any parameters defined for the view and Prompt is set to Yes, then the Presentation section will be the only thing that displays in the View Prompt window.
5	OK and Cancel - <ul style="list-style-type: none"> • OK - If you specify parameters and click OK, the window closes and the specified parameter values will be applied to filter the view. Filter icons will display next to the filtered levels. You can click OK without specifying any parameters. If none of the parameters are required, the window closes and the view runs without any filtering by parameter. If any of the parameters are required, a prompt will display indicating that you must specify a value for that parameter. • Cancel - If you click Cancel, the window closes and the View Definition window displays. You might choose to do this if you decide you want to make edits to the view before running it. Make changes and then access the View Prompt window again to specify parameters and run the view. If the window doesn't open automatically after your editing has been applied to the view, click the Prompt button  in the grid toolbar.

Advanced Concepts

How Parameter Display Text Interacts with Other Settings

When you are setting up parameters, you have the option of customizing the Display Text property for them. For a Drop Down parameter in the View Prompt window, this property can influence how members display in the drop-down selection list of the View Prompt window. For Select Members, User List, and Expression parameters, the property can influence how information displays by default in the Select Members, Advanced Select Members, and Select User List Filter windows when those windows are accessed for their respective parameter types in the View Prompt window.

Additional details and examples related to the parameter Display Text property are provided in this topic.

- [Additional Details about the Property](#)
- [Examples of the Property Interacting with Other Settings](#)

Keep in mind, there is an administrative Search By setting that takes precedence when it is set to a specific attribute for the level on which the parameter exists. In such cases, the Search By setting in the Select and Advanced Select Members window will always default to the administrator-defined attribute.

Additional Details about the Property

Your choices for a parameter's Display Text are View or an attribute for the parameter's level. An attribute is either the level value or one of its attribute relationships.

- **View** – This is the default Display Text selection for all parameter types and has the following impact depending on parameter type:
 - **Drop Down** -- Members in the drop-down selection list of the View Prompt window will display the same as they do for level members in the grid. That means by value if level members in the grid display by value, or by an attribute relationship if level members in the grid display by that attribute relationship.
 - **Select Members** – Select and Advanced Select Members windows opened from the View Prompt window for the parameter will have their display columns default to the values and/or attribute relationships showing in the grid (acting the same as they do when the windows are opened from other

areas in the grid such as from level filter icons). The Search By property in the windows will default to the first display column in the grid or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.* Similar behavior occurs for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.

- **User List** – Display columns in the Select User List Filter window opened from the View Prompt window will default to the values and/or attribute relationships showing in the grid. The first display column will be either the first display column in the grid or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*
- **Value** – This parameter Display Text selection has the following impact, depending on the parameter type:
 - **Drop Down** – Choose this option if you want members in the drop-down selection list of the View Prompt window to display by their values regardless of how level members are displayed in the grid.
 - **Select Members** – The first display column in Select and Advanced Select Members windows opened from the View Prompt window for the parameter will default to value. The Search By property will default to value or an administrator-specified attribute relationship depending on how you administrator has set up Select Members options settings for the level.* Similar behavior occurs if you choose Value for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.
 - **User List** – The first display column in the Select User List Filter window will default to value or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*
- **An attribute relationship** – If a level has attribute relationships available for it in the view, you can choose one of those attribute relationships as the parameter Display Text. If no attribute relationships are available, only View and Value options will be available for Display Text. Choosing an attribute relationship as the parameter Display Text has the following impact depending on the parameter type:
 - **Drop Down** – Choose this option if you want members in the drop-down selection list of the View Prompt window to display by the attribute relationship you selected regardless of how level members are displayed in the grid.
 - **Select Members** – The first display column in Select and Advanced Select Members windows opened from the View Prompt window for the parameter will default to the attribute relationship you selected. The Search By property will default to that attribute relationship or an administrator-specified attribute relationship depending on how you administrator has set up Select Members options settings for the level.* Similar behavior occurs if you choose an attribute relationship for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.
 - **User List** – The first display column in the Select User List Filter window will default to the attribute relationship you selected or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*

***Note:** If your administrator sets the level's Search By setting in Select Members Options to a specific attribute, that attribute relationship takes precedence over any parameter Display Text settings. The Search By setting for a level in the Select Members Options needs to be set to System Defined in order for parameter Display Text settings to take effect.

Examples of the Property Interacting with Other Settings

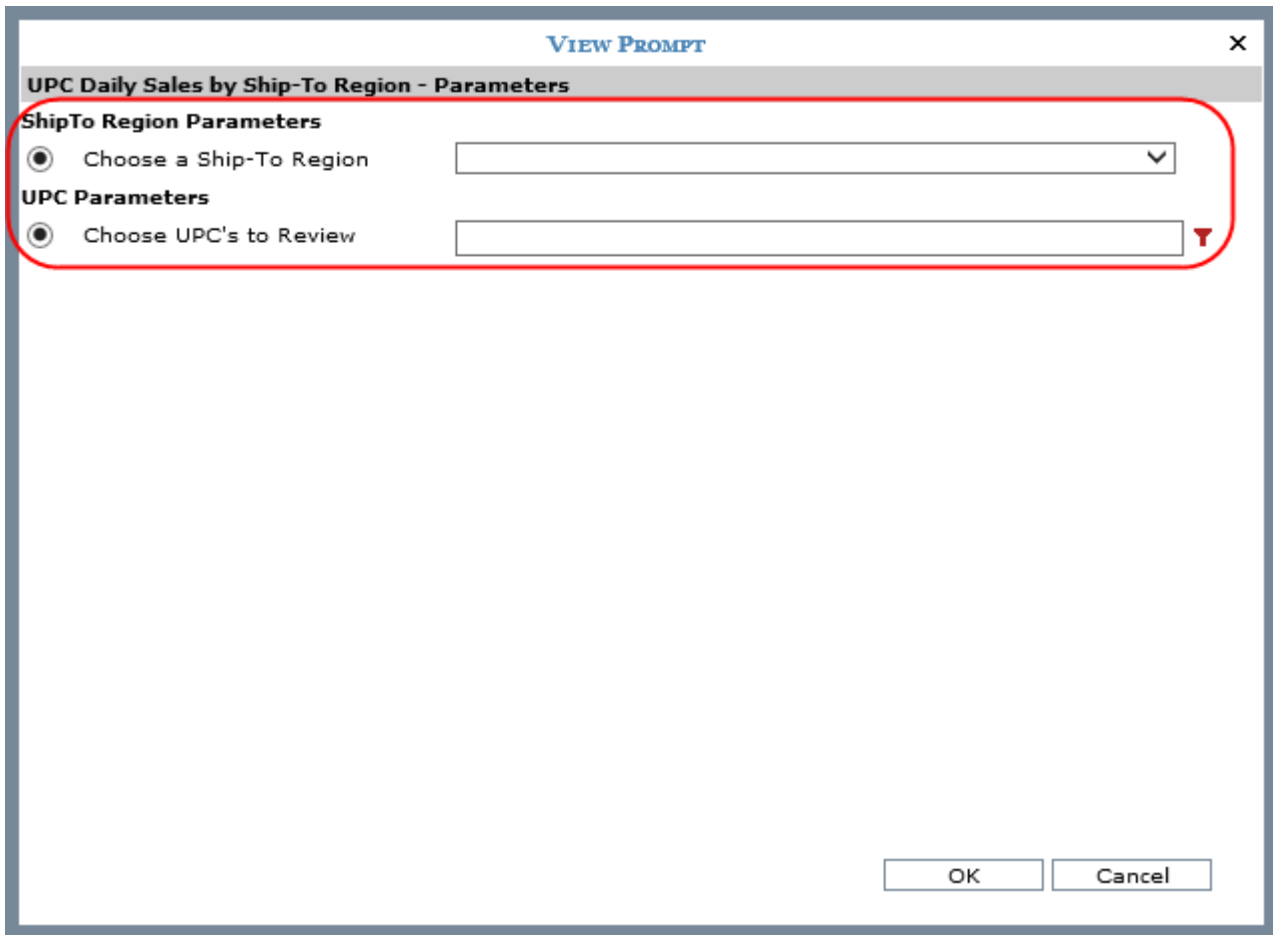
The following examples demonstrate how the Display Text property for parameters interact with other settings to influence what users see when accessing filtering windows from the View Prompt window in a view with parameters.

The following view has a Drop Down parameter on the Ship-to Region level. The SRgn Short Description and SRgn Country attribute relationships display for that level in the grid. There is a Select Members parameter on the UPC Global Number level. The UPC Short Description and UPC ABC Classification attribute relationships display for that level in the grid with the short description specified as the Display Text for the level. The three examples that follow show what users will see when they run the view and make parameter selections in the View Prompt and related filtering windows.

View Name: *UPC Daily Sales by Ship-To Region*

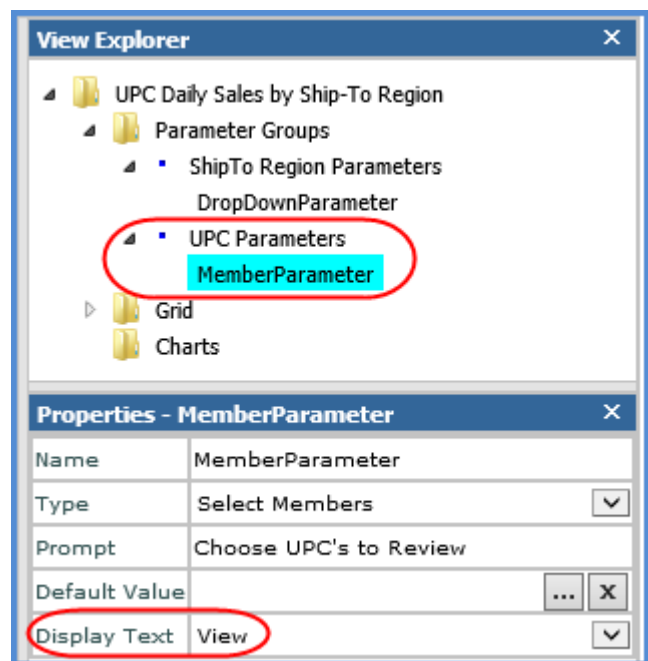
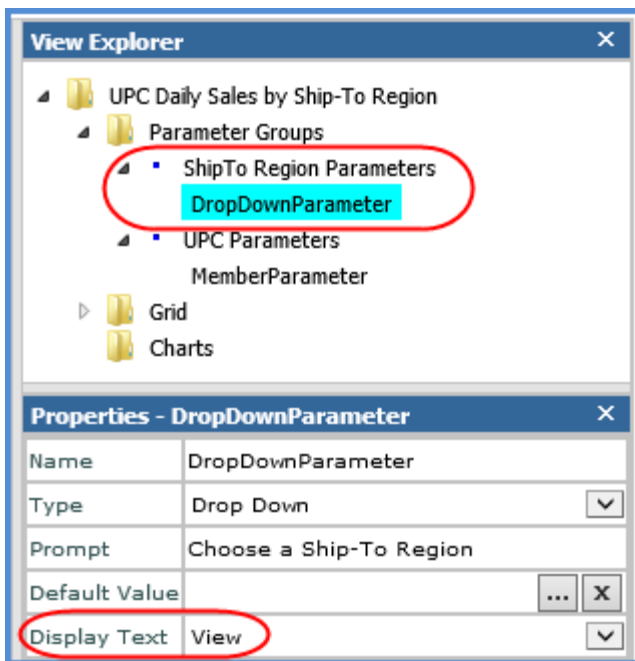
View Filter

	Ship-To Region >>	W. CAN		All Others		Grand Total
	SRgn Country	CAN				
UPC Global Number	UPC ABC Classification	Daily Sales Amount Jan 14 to Sep 14	Daily Sales Units Jan 14 to Sep 14	Daily Sales Amount Jan 14 to Sep 14	Daily Sales Units Jan 14 to Sep 14	Daily Sale Amount Jan 14 to Sep 14
Apple Filling 106oz BR*	B	\$5,349,787	1,210	\$20,208,603	4,922	\$25,55
Apple Filling 106oz PL*	A	\$12,587,976	3,931	\$50,078,627	16,494	\$62,66
Apple Filling 12oz BR*	B	\$2,461,067	1,365	\$8,697,768	3,553	\$11,15
Apple Filling 12oz PL*	A	\$1,875,259	937	\$25,367,112	10,036	\$27,24
Apples Red Delicious	B	\$10,125,146	5,910	\$51,616,825	34,628	\$61,74
Applesauce 106oz BR*	A	\$3,486,263	653	\$29,631,923	8,415	\$33,11
Applesauce 106oz PL*	A	\$28,706,689	4,805	\$97,139,933	20,314	\$125,84
Applesauce 12oz BR*	A	\$3,809,561	1,232	\$21,619,517	4,994	\$25,42
Applesauce 12oz PL*	A	\$4,345,530	2,272	\$60,790,985	27,156	\$65,13
Asparagus	C	\$16,301,526	1,560	\$96,845,428	25,981	\$113,14
Baby Carrots	A	\$8,199,239	3,393	\$35,278,803	14,733	\$43,47
Bananas	B	\$2,467,573	1,800	\$13,750,576	7,470	\$16,21
All Others		\$447,804,626	128,796	\$2,466,375,126	728,709	\$2,914,17
Grand Total		\$547,520,242	157,862	\$2,977,401,224	907,406	\$3,524,92

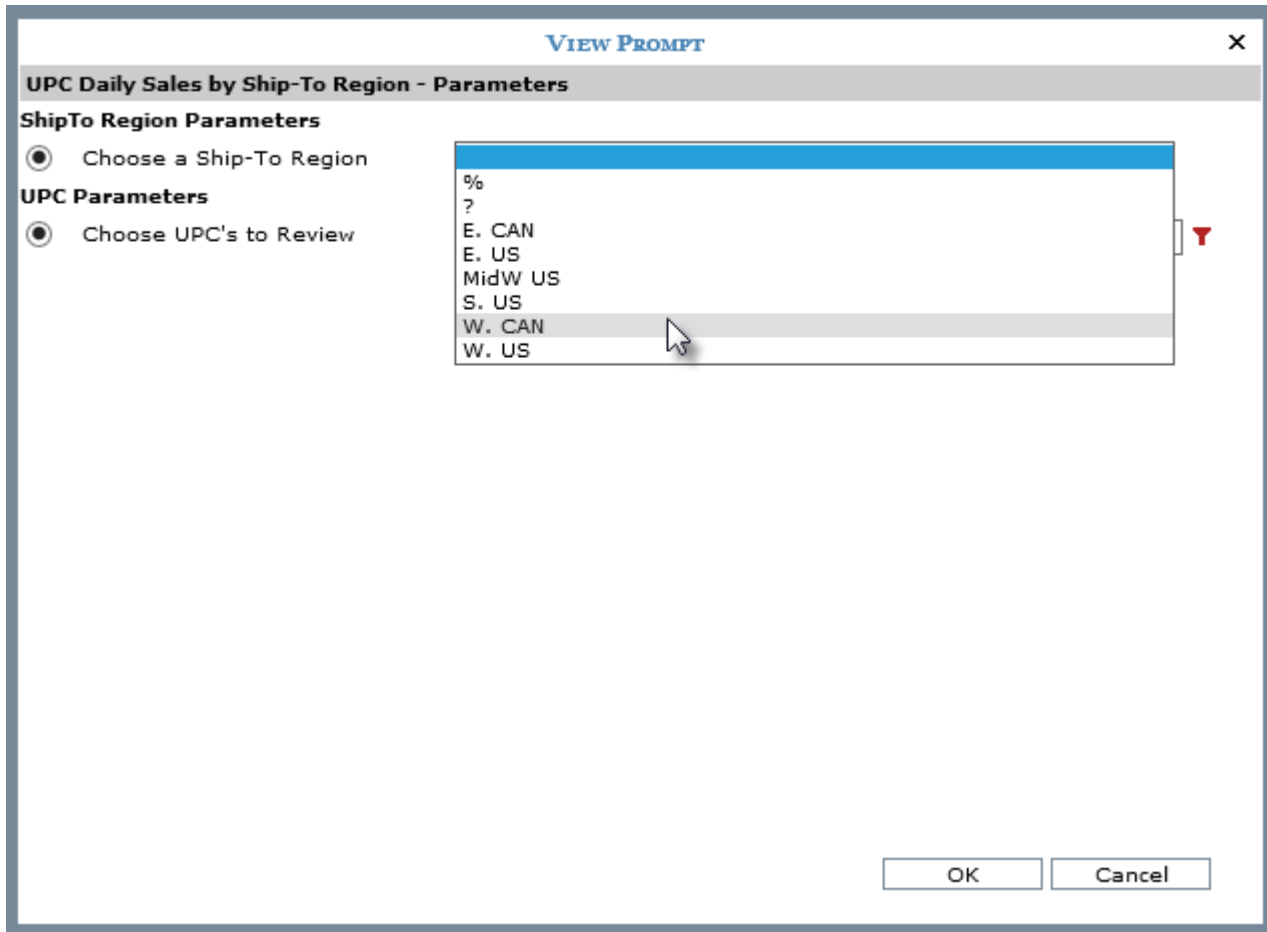


Example 1, Parameter Display Text = View

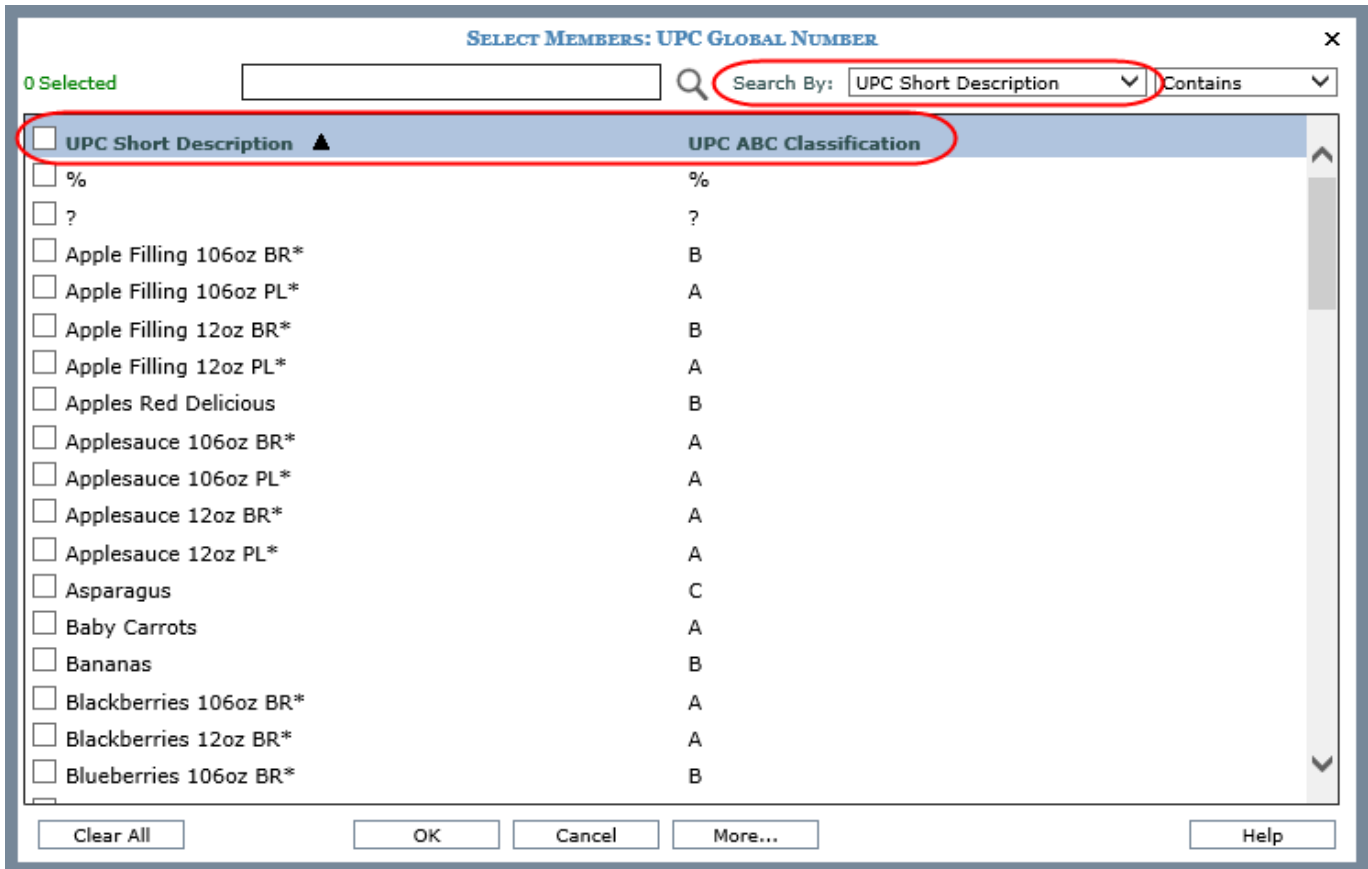
In this example, the Display Text property for each parameter is set to View. The administrative Search By setting is set to System Defined for both levels.



The drop-down list in the View Prompt window for the Ship-To Region parameter displays members by what shows in the grid for Ship-to Region members, in this case the SRgn Short Description.

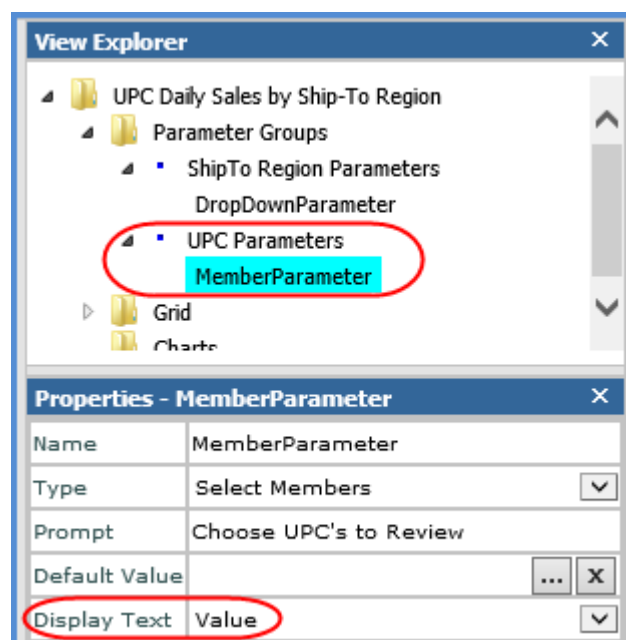
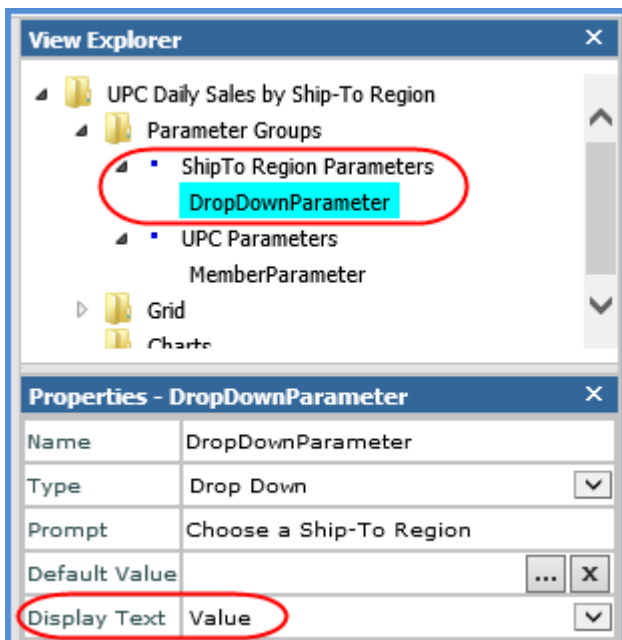


The filtering windows accessed from the View Prompt window for the UPC Global Number parameter display information according to the grid as well. Search By in the Select and Advanced Select Members windows will default to the first attribute displayed in the grid, which is UPC Short Description. Display columns in the filtering windows will be UPC Short Description and UPC ABC Classification.

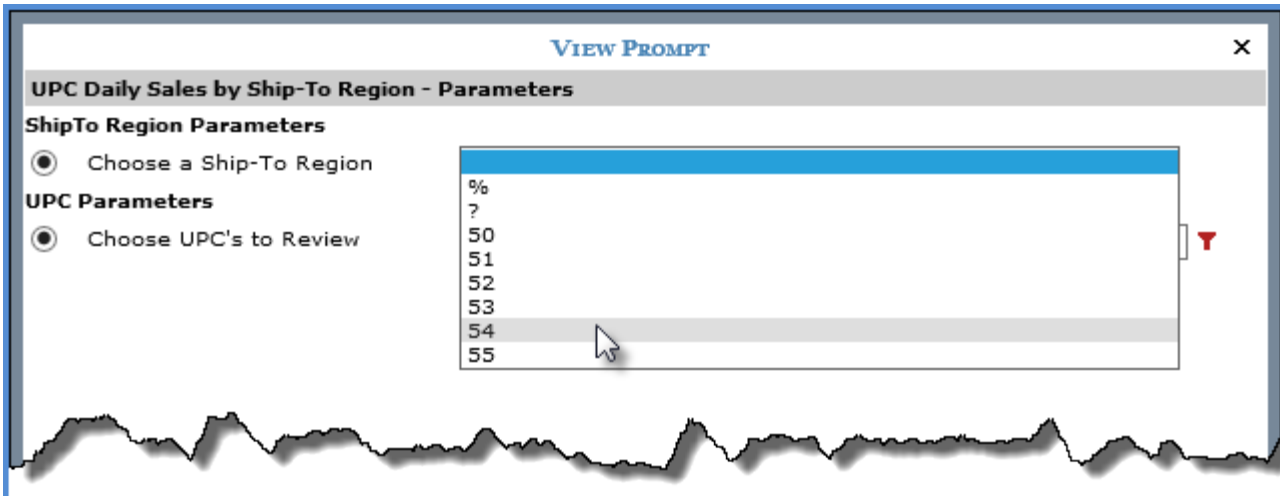


Example 2, Parameter Display Text = Value

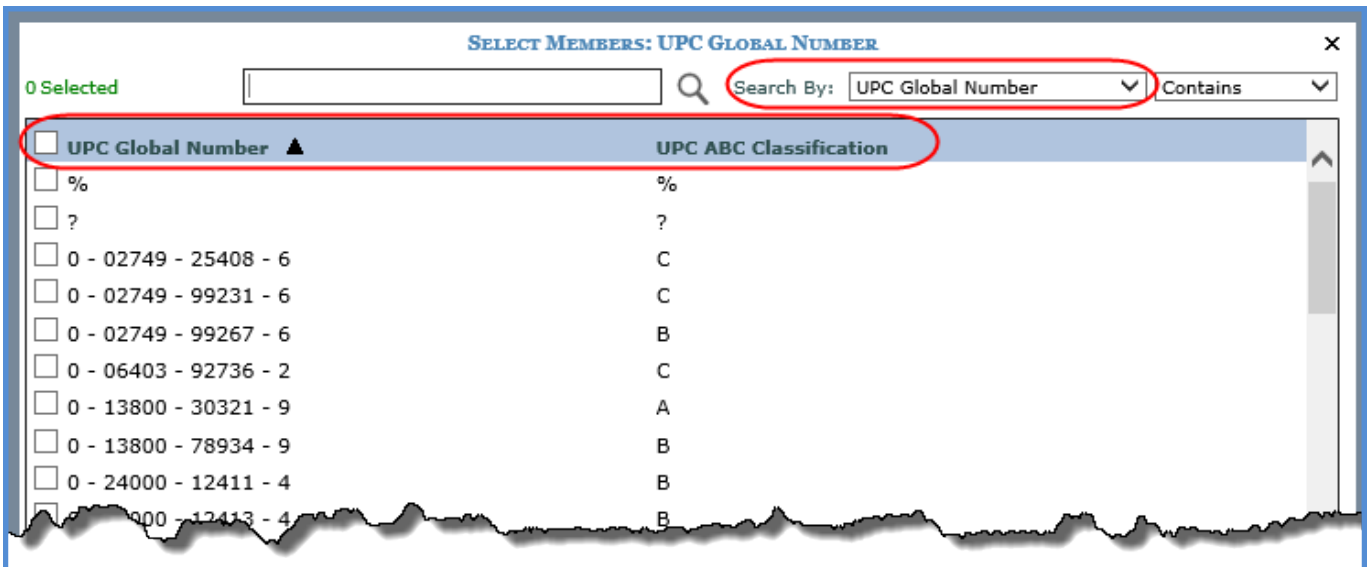
The second example is of the Display Text property set to Value for each parameter. The administrative Search By setting is still set to System Defined for both levels.



The drop-down list in the View Prompt window for the Ship-To Region parameter display members by value.

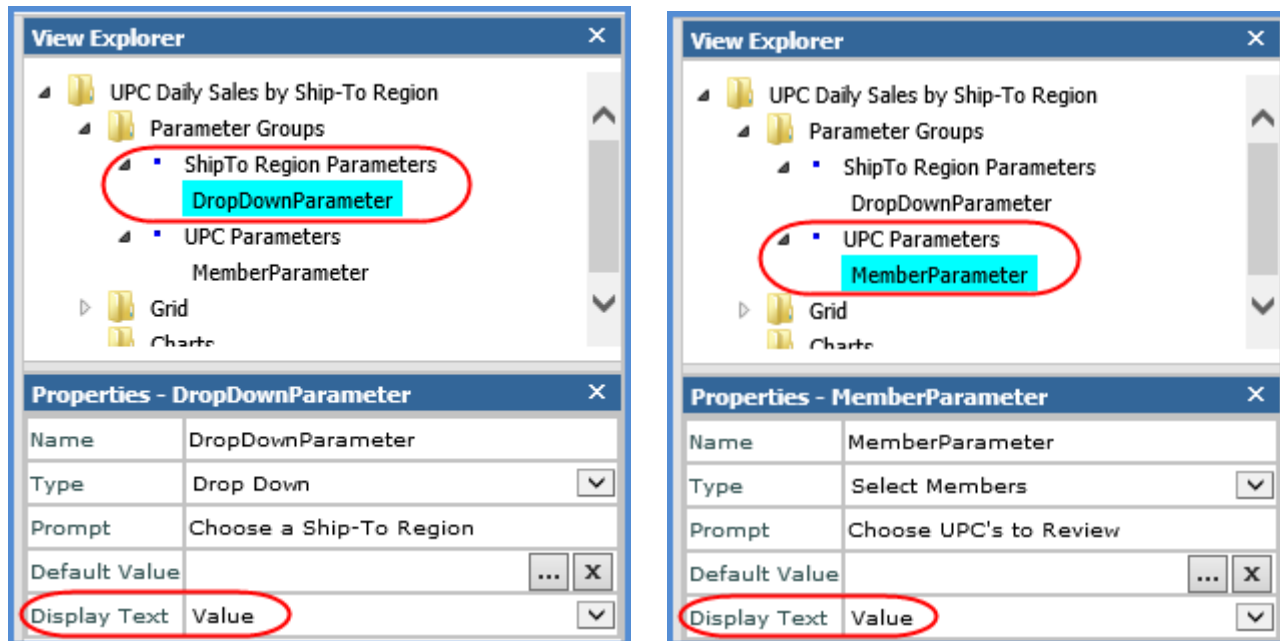


The filtering windows accessed from the View Prompt window for the UPC Global Number parameter will have their Search By default to the UPC Global Number value. The first display column in the filtering windows also will default to the UPC Global Number value. The remaining display columns in the windows will be any other attributes in the grid other than the level Display Text – which in this case is just UPC ABC Classification.

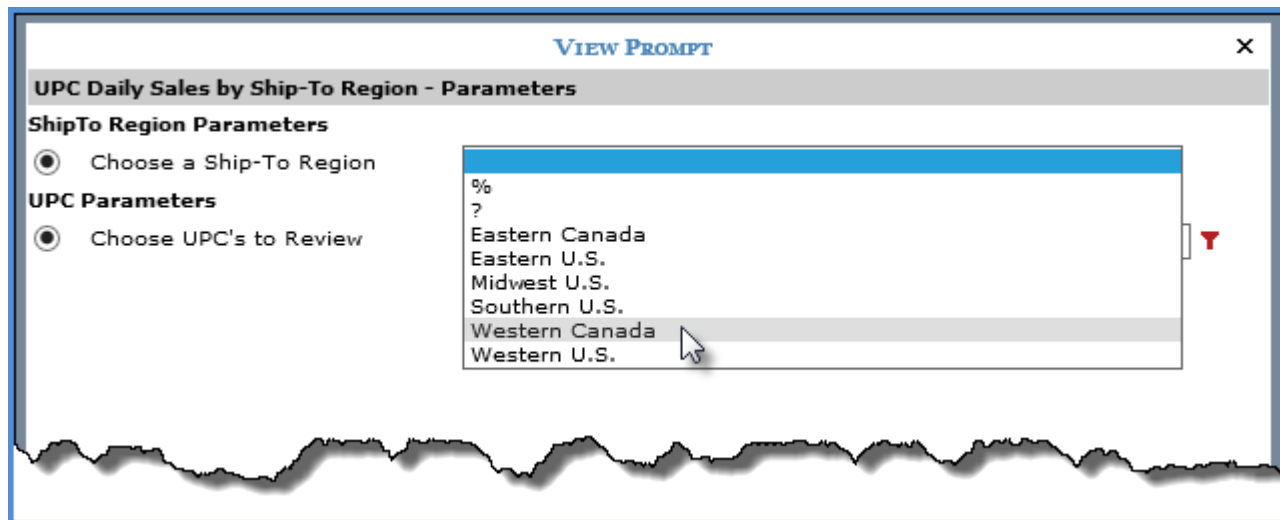


Example 3, Parameter Display Text = Value

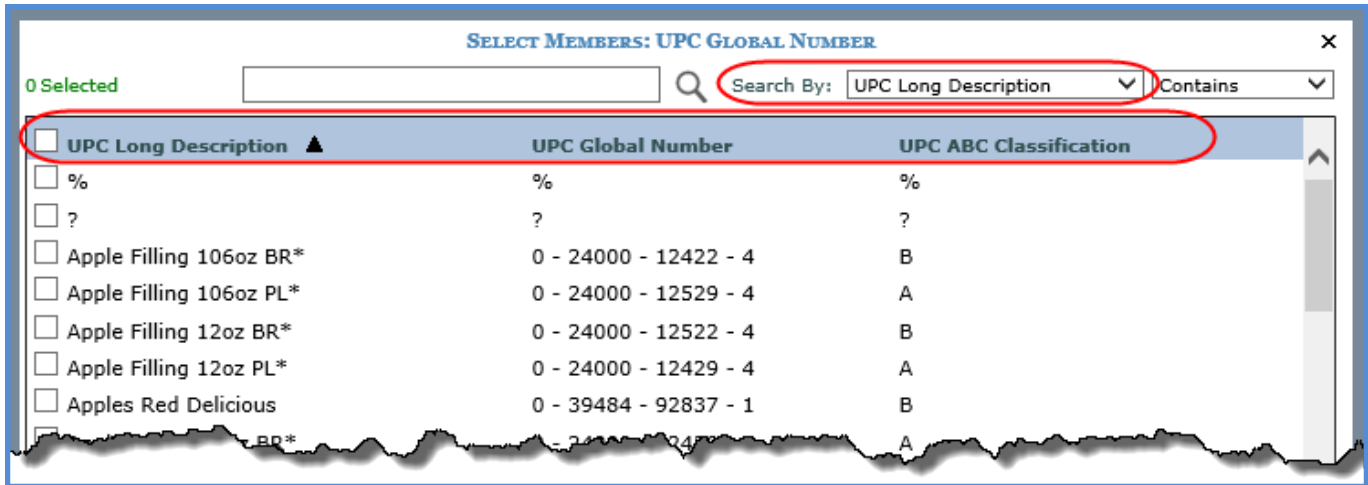
The final example also uses a Display Text property of Value for each parameter. However, in this case, the administrative Search By setting for both levels has been set to their Long Description attributes relationships. This means the administrative setting will take precedence in the View Prompt and related filtering windows.



The drop-down list in the View Prompt window for the Ship-To Region parameter display members by SRgn Long Description.



The filtering windows accessed from the View Prompt window for the UPC Global Number parameter will have their Search By default to UPC Long Description. The first display column in the filtering windows also will default to UPC Long Description. The remaining display columns in the windows will be the value (as defined by the parameter Display Text) and any other attributes in the grid other than the level Display Text – which in this case is just UPC ABC Classification.



Passing Parameters into Views via URL's

Stratum.Viewer supports passing parameters to existing views through URL access. This provides integration between other applications and Stratum.Viewer views. The types of parameters that can be used with this functionality are Select Members, Drop Down, User List, and Expression (except for named sets) parameters. For example, the following URL passes two values for a Select Members parameter named RepBrokerMembers that exists for the RepBroker level.

`http://server-xyz:60500/Default.aspx?ViewID=472&vp:RepBrokerMembers=306;305`

The syntax of the URL must contain the location of the Stratum.Viewer application, the view ID, the name of the parameter, and the values to be passed in a format supporting the specified parameter type. For user list parameters, you also need the user list ID. You also can include syntax in the URL that will control the display of the grid toolbar, name of the view and image above the grid, View Filter section, and view explorer. A few [examples](#) showing different types of parameter values passed into views via URL's follow. Before looking at the examples, here are some tips about where to find the information needed for the URL syntax. Also shown is the syntax for hiding the toolbar, View Filter section, and view explorer.

Syntax for URL's

This table shows the format to use when setting up different parts of the URL.

Item	Format & Values
Location of Stratum.Viewer and display of top frame and left panel	<p>To run the view without the Stratum.Viewer top frame and left panel: <code>http://server-xyz:#####/ViewWindow.aspx</code> where server-xyz is the name of the Stratum.Viewer server and ##### is its port number.</p> <p>To run the view with the Stratum.Viewer top frame and left panel displayed: <code>http://server-xyz:#####/Default.aspx</code> where server-xyz is the name of the Stratum.Viewer server and ##### is its port number.</p>
View name	ViewID=# where # is the ID assigned to the view by Stratum.Viewer
Parameter name	Name= where name is the parameter name and the value(s) of the parameter follow the equal sign
Separators between items	<p>? - use a question mark to separate the location of Stratum.Viewer from the View ID</p> <p>&vp: - use that string of text to separate the View ID and parameter name (note the colon used after the &vp text). Also used to separate multiple parameter types if more than one type is passed via the URL.</p> <p>; - use a semi-colon to separate multiple values specified for a single Select Members parameter.</p> <p>& - use an ampersand to separate additional items in the URL from the parameters, such as syntax for hiding the grid toolbar, View Filter section, or view explorer.</p>
Grid toolbar	<p>To hide it, use <code>IsHideToolbar=True</code></p> <p>To display it, either exclude this syntax from the URL all together or use <code>IsHideToolbar=False</code></p>
View name above grid	<p>To hide it, use <code>IsHideViewName=True</code></p> <p>To display it, either exclude this syntax from the URL all together or use <code>IsHideViewName=False</code></p>
View image above grid	<p>To hide it, use <code>IsHideViewImage=True</code></p> <p>To display it, either exclude this syntax from the URL all together or use <code>IsHideViewImage=False</code></p>
View Filter section	<p>To hide it, use <code>IsHideViewFilter=True</code></p> <p>To display it, either exclude this syntax from the URL all together or use <code>IsHideViewFilter=False</code></p>
View explorer	<p>To hide it, use <code>IsHideExplorer=True</code></p> <p>To display it, either exclude this syntax from the URL all together or use <code>IsHideExplorer=False</code></p>

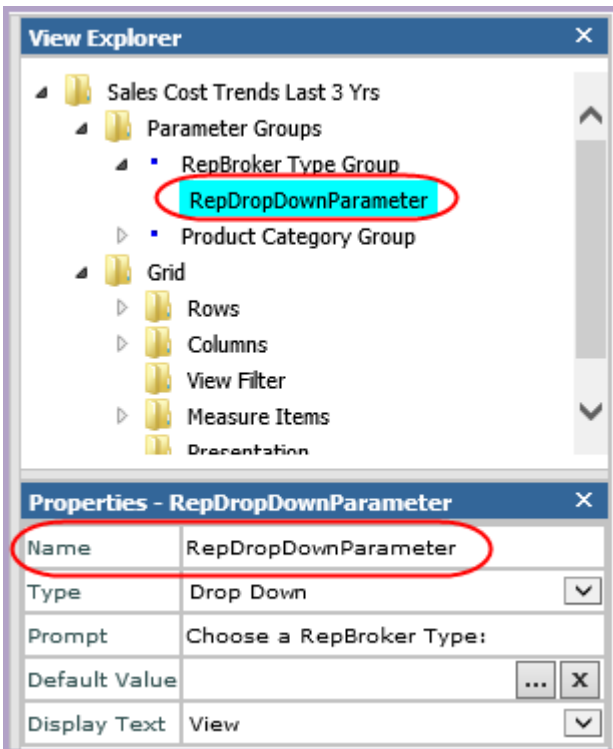
View ID

The ID's for views can be looked up in their properties window. An example is shown below. The View list window also displays the ID's for each view.




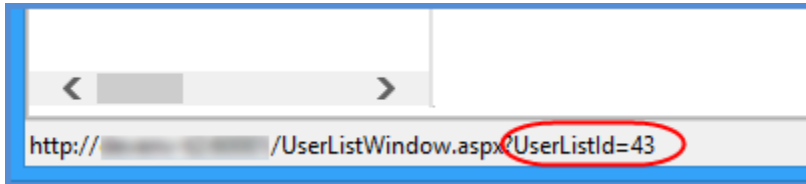
Parameter Name

The name of a parameter can be looked up in view explorer. Right-click the associated view name in the left panel and select Edit. Expand the parameter group for the parameter to see the parameter name. The name also shows in its Properties window, accessed by double-clicking the parameter.



User List ID

The user list ID shows in the bottom of your browser window when you open a list from the User List window as the list loads in the User List Maintenance window. The ID displays in the same area when you are viewing the list from the User List Maintenance window and hover the mouse cursor over any buttons in the toolbar except for the Help button -- for example, when the mouse cursor is over the New button .

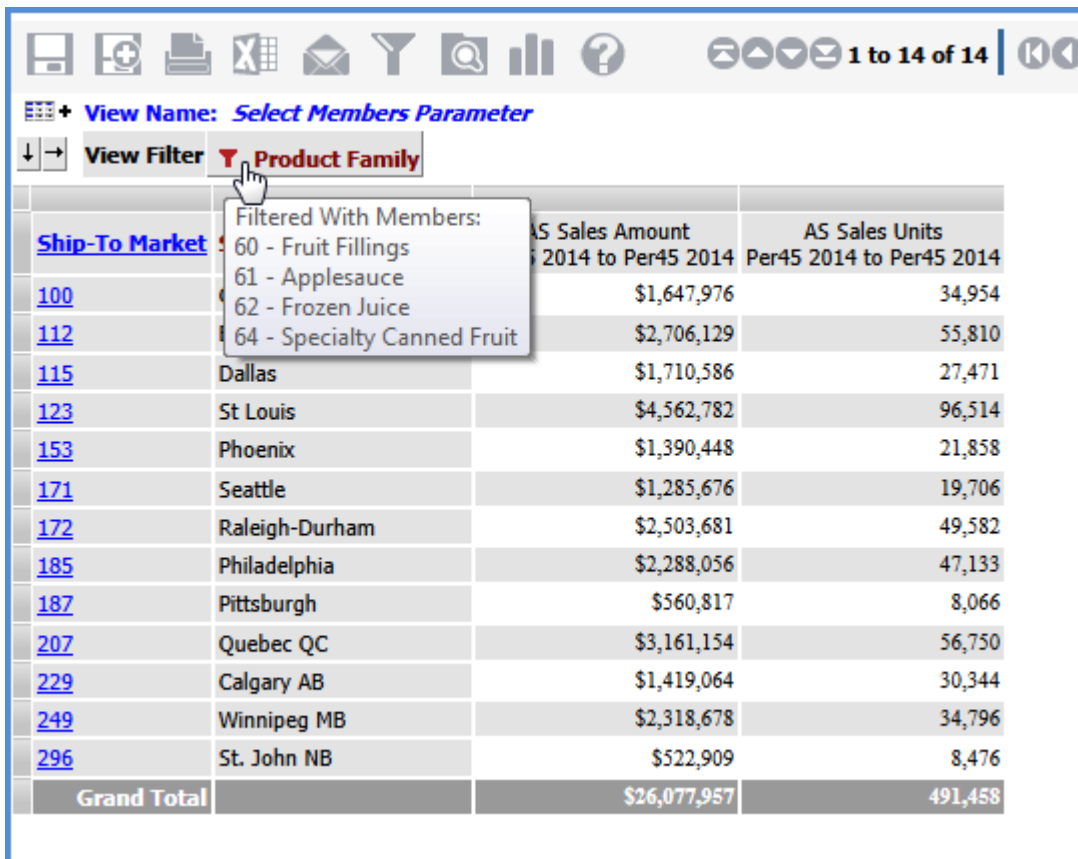


Examples

Select Members Parameter

This URL runs a view with ID 931. It returns four members for a Select Members parameter named MembersParameter that exists on the Product Family level.

<http://server-xyz:60500/Default.aspx?ViewId=931&vp:MembersParameter=60;61;62;64>



Ship-To Market	AS Sales Amount	AS Sales Units
	2014 to Per45 2014	Per45 2014 to Per45 2014
100	\$1,647,976	34,954
112	\$2,706,129	55,810
115	\$1,710,586	27,471
123	\$4,562,782	96,514
153	\$1,390,448	21,858
171	\$1,285,676	19,706
172	\$2,503,681	49,582
185	\$2,288,056	47,133
187	\$560,817	8,066
207	\$3,161,154	56,750
229	\$1,419,064	30,344
249	\$2,318,678	34,796
296	\$522,909	8,476
Grand Total	\$26,077,957	491,458

Note: The previous URL and URL's in the remaining examples will display the top frame and left panel of Stratum.Viewer. That part of the interface has simply been cropped from the example images.

Drop Down and User List Parameters

This URL runs a view with ID 932. It returns a member for a Drop Down parameter named DropDownRepParameter that exists on the RepBroker level. The URL also returns members for a User List parameter named UserListShipToParameter that exists on the Ship-To Market level. The specified list has an ID of 104.

http://server-

xyz:60500/Default.aspx?ViewId=932&vp:DropDownRepParameter=300&vp:UserListShipToParameter=104

The screenshot shows a web application interface with a toolbar at the top containing icons for save, print, search, and other functions. Below the toolbar, the view name is "Drop Down Parameter" and there is a "View Filter" section. The main data table has the following structure:

▼ RepBroker >> 300		All Others				Grand Total
▼ Ship-To Market		Actual Sales Amount Sep 2014 to Sep 2014	Actual Sales Units Sep 2014 to Sep 2014	Actual Sales Amount Sep 2014 to Sep 2014	Actual Sales Units Sep 2014 to Sep 2014	Actual Sales Amount Sep 2014 to Sep 2014
	RepBr Long Description Nicole Toscano					
112	Buffalo	\$31,334,747	802,585	\$29,235,306	555,996	\$60,570,053
172	Raleigh-Durham	\$25,056,769	627,464	\$24,648,935	452,015	\$49,705,704
185	Philadelphia	\$26,184,748	657,979	\$18,595,920	350,302	\$44,780,667
All Others		\$113,552,055	2,827,199	\$96,989,555	1,877,233	\$210,541,610
Grand Total		\$196,128,318	4,915,228	\$169,469,716	3,235,546	\$365,598,034

Expression Parameter

This URL runs a view with ID 933. It returns the values of an evaluated expression related to an Expression parameter named ExpProdParameter that exists on the Product level. The expression passed into the view by the parameter returns members of the level with a Prod ABC Classification attribute relationship of B.

After the parameter information, we included the text IsHideViewFilter=True in order to hide the View Filter section.

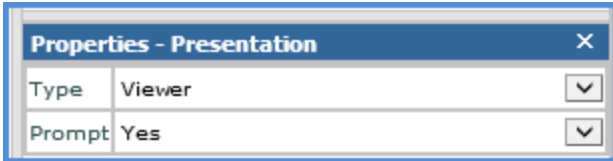
http://server-

xyz:60500/Default.aspx?ViewId=933&vp:ExpProdParameter=[Product].[Product].CurrentMember.Properties("Prod ABC Classification") = "B"&IsHideViewFilter=True

Product	Prod ABC Classification	Actual Sales Amount Jan 2014 to Sep 2014	Return Amount Jan 2014 to Sep 2014
FrtCktail h		\$20,521	(\$1,788)
Peach Hlvs		\$12,838	(\$1,256)
Peach Slcs		\$19,834	(\$1,424)
Mand Org Pcs 12oz BR* 0A	B	\$18,021	(\$2,537)
Escaloped Apples 12 oz BR* 0A	B	\$19,896	(\$1,422)
Tropical Mix LS 12oz BR* 0A	B	\$13,052	(\$833)
Pnappl Slcs 12 oz BR* 0A	B	\$127,980	(\$13,615)
Pnappl Bites 12oz BR* 0A	B	\$7,296	(\$1,170)
Cherry Filling 12 oz BR* 0A	B	\$8,296	(\$2,497)
Grapefruit Sctn Sw 12oz BR* 0A	B	\$409	(\$67)
Apple Filling 12oz BR* 0A	B	\$4,994	(\$1,261)

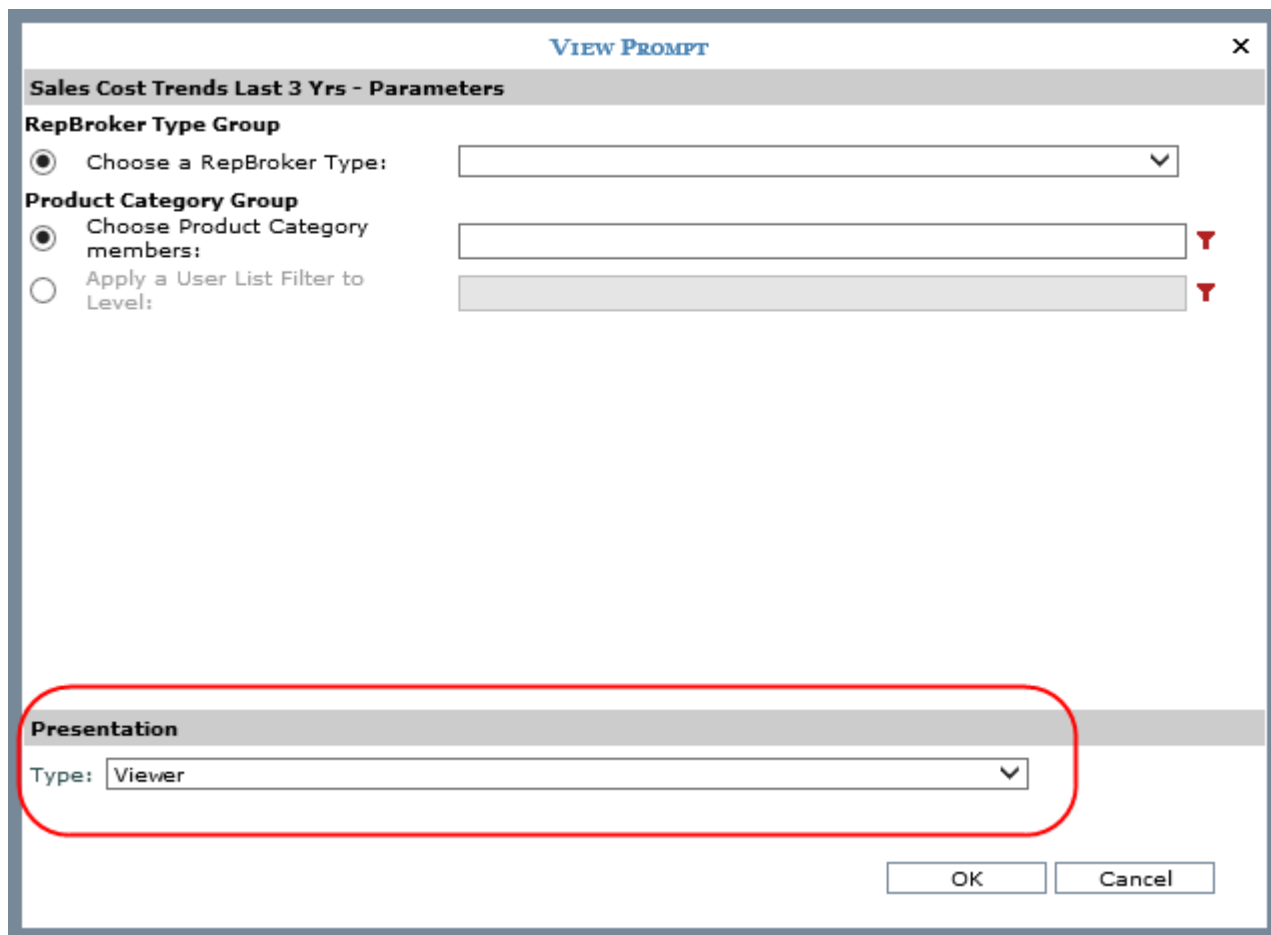
Prompting Users to Choose the View Presentation Format

You can set up views such that users will be prompted to choose the format for displaying view results each time they run the view, This is done by setting the Presentation section's Prompt property to Yes.

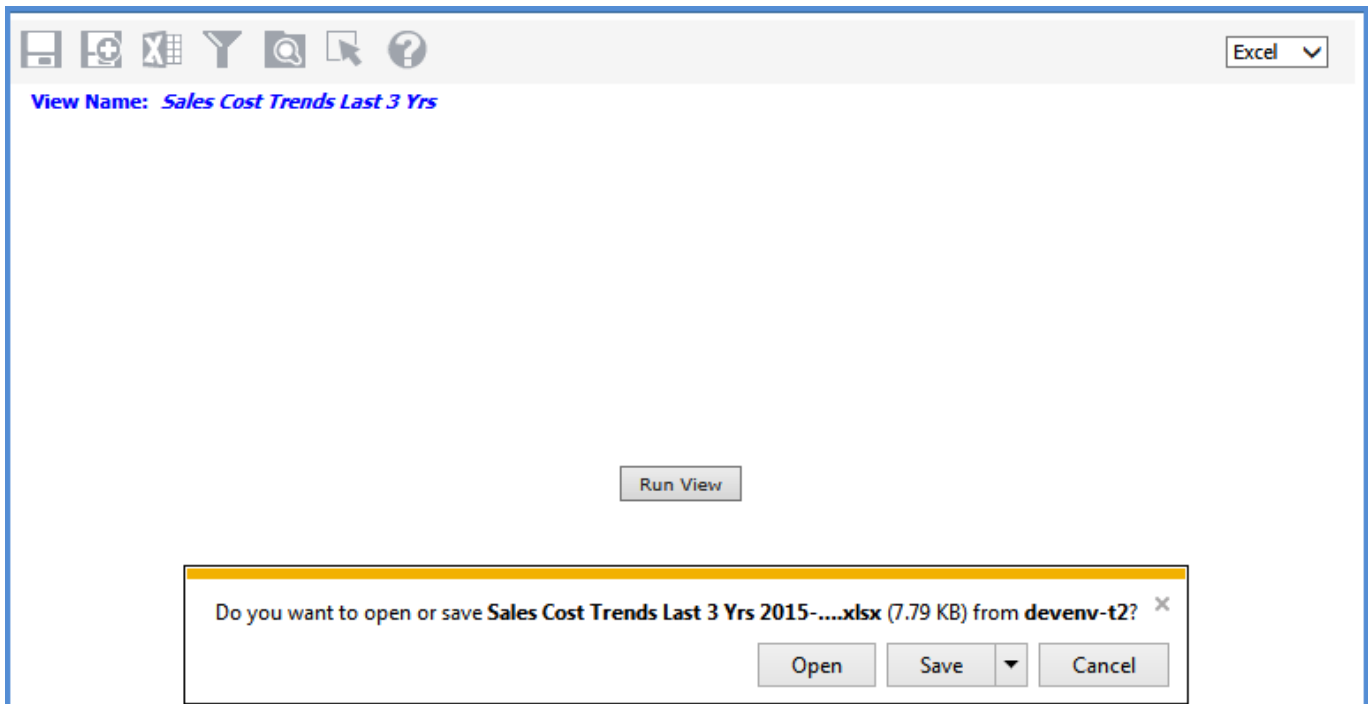


When the users, run the view, they will be presented with a View Prompt window. They can change the selection in the Presentation section to run the view in Viewer (grid) format or as an MS Excel file.

Note: If there aren't any other parameters defined for the view, then only the Presentation section will display in the View Prompt window.



If the Viewer option is selected, the view grid will display in the Stratum.Viewer interface. If the Excel option is selected, the View Definition page will display in the background while a File Download window or browser message opens. Users can open the file or save it to a specified location.



Removing Parameters While Performing a "Save As"

1. Click Save As in the grid toolbar.
2. Set up the properties for the new view and then de-select the Parameter Prompting checkbox.
3. Click Save.