Working with Filters

Stratum.Viewer 7

Getting Started

- Access to Filtering
- Introduction to Filtering

Tasks

Adding

- Apply a Filter to Levels
- <u>Apply a Filter to Measure</u>
 <u>Items</u>
- <u>Apply a Filter to Totals</u>
- <u>Apply a Relationship or Empty</u> <u>Filter</u>
- <u>Apply a View Filter</u>
- Apply an Axis Filter

Editing

- Change Existing Filters
- Clear Filters

Additional Information

Examples

- <u>Expressions for Rolling "N" Period</u>
 <u>Based Views</u>
- Expressions for Filtering Levels
- Expressions for Filtering an Axis
- Filtering Totals

Windows

- <u>Advanced Select Members</u>
 <u>Window</u>
- Display Options Window for Select and Advanced Select Members Windows
- Expression Window for Filters
- Filters Window
- Grid Pop-up Menus
- Measure Item Filter Window
- Navigation Panel
- Paste Members Window
- Properties Windows for:
 - Attribute Relationships
 - <u>Columns</u>
 - Individual Measure Items
 - <u>Levels</u>
 - Rows
 - View Filter
- Select Filter Method Window
- Select Members Window
- Select Named Set Filter Window
- Select User List Filter Window

Advanced Concepts

 <u>Axis Filter Behavior When Levels</u> are on Opposite Axis

- <u>Comparison of Top / Bottom,</u> Recursive, and Overall Filters
- <u>Edit the Information Displayed in</u> <u>the Select and Advanced Select</u> <u>Members Windows</u>
- <u>Factors Influencing Default</u> Settings in Filtering Windows
- <u>Guidelines for Sorting and</u> <u>Filtering on Totals</u>
- Named Sets
- Potential Sources of Data for use with Pasting Members
- Recommendations for View
 Filters
- <u>Treatment of Time-Related</u> Levels by the Filters Window
- Using a View Filter vs. a Level <u>Filter</u>
- <u>Using Relationship and Empty</u> <u>Filters</u>

FAQ's

- <u>Can Measure Items with</u> <u>Conditional Formatting including</u> <u>Images and Indicators be</u> <u>included in a Filter?</u>
- What Does 'Not Mapped' Mean in Views and Filter Windows?
- What Does "Not Valid" Mean in Views and Filter Windows?
- Why can't I Access the Select Members Window?
- <u>Why can't I Filter or Sort</u> <u>Cumulative Calculated Measure</u> <u>Items?</u>
- Why did a Level That I Filtered Get Moved to the View Filter Section of My View?
- <u>Why Doesn't a Level for a View</u> <u>Show in the Filters Window?</u>
- <u>Why is a Filter Property</u>
 <u>Disabled?</u>

Definitions

- <u>Axis Filter</u>
- Display Column
- <u>View Filter</u>

Access to Filtering

Filtering functionality is available to all users – you can add, edit, and remove all types of filters using the Filters window. You can also click the filter cue **T** next to a filtered item in the grid to edit that specific filter.

Introduction to Filtering

Filtering is a way of selecting the data that is most important to you. Filters can be associated with levels, measure items, totals, the overall view, and rows and columns. You can combine filters with sorts to achieve a view of data that best suits your business needs. A filter cue **T** displays next to an item when a filter has been applied. Click on that filter cue to review, edit, or clear the applied filter.

You also can add and manage multiple types of filters from the <u>Filters window</u>, which is accessed from the Manage All Filters icon in a view. When filters exist in a view, that icon displays as red as a hint that filters exist.

			*	My I	RepBi	roker	's Co	mpa	rative	Sale	s by l	Brane	ł				
- 0	X		ıll.	<u>.</u>			1 <u>2</u> 3		Sho	<u>w All</u> E	900	3 1 to 3	30 of 30	91	000	1 to 5	0 of 99
Rows:	∷ <u>P</u>	roduct Brand:	All × >	Proc	duct: All	× > :	Man	age All I	Filters								
Columns:	Columns: :: Customer Sold-To: All × + Manage the filters applied to your data. Change one or more filter at a time.																
View Filter:								More									
		Customer Sold-To	150120									150130					
<u>Product</u> <u>Pr Brand</u>	<u>roduct</u>	Prod Long Description	Actual Sales Amount Jul 17 to Sep 17	Actual Sales Amount Jul 16 to Sep 16	Sales % Change		Sep 16	MTD Sales % Change	Actual Sales Amount Jan 17 to Sep 17	Actual Sales Amount Jan 16 to Sep 16	YTD Sales % Change	Actual Sales Amount Jul 17 to Sep 17		Sales % Change	Sep 17	Sep 16	MTD Sales % Change
001 620	4954014	Asparadus 0A			0%			0%	\$98.602	\$90.097	0 4%			0%			0%

			Filters			×
Levels	Data	Axis				
RepBroker:	308 - Dean	Cizek, 309 - Terr	ry Bruno, 312 - Mike Hartney, 313 - Eleanor Toma	T	×	
Customer Type:	A - Class A	Customer, B - Cla	ass B Customer	Ţ	×	
Customer Sold-1	Го: No filter ex	ists			hange	Filter
Product Brand:	No filter ex	ists		T	×	
Product:	No filter ex	ists		T	×	
Ship-To Market:	No filter ex	ists		T	×	
				Ж	Cancel	

Level Filter

You can filter levels using members, user lists, named sets, and expressions. For example, you have a view listing RepBrokers and you want to only see three. You apply the member filter shown below.

		* R	egional Rep	Broker Daily	/ Sales
- 0	🗴 📑 🔊		9 🔯 🍸	123 2 6	1 to 10 of 10
Rows: Columns:	[∷] Sales Dir: All +	× > ∷ <u>Region</u> :	: All × > ∷RepBr	oker: Filtered 🗙 🕽	∷Product ABC Class × ∷Product × ▶ +
View Filter:	+				
<u>Sales Dir</u>	<u>Region</u>	RepBroker	Daily Sales Amount Jul 2017 to Sep 2017	Daily Sales Units Jul 2017 to Sep 2017	
Helen Briggs	<u>East</u>	Nicole Toscano	\$2,675,823	62,905	
		Michelle Knapp	\$98,729	1,585	
		East Total	\$2,774,552	64,490	
	<u>West</u>	Michelle Knapp	\$122,992	2,119	
		West Total	\$122,992	2,119	
	Helen Briggs Tota		\$2,897,544	66,609	
Steve Mentas	<u>West</u>	Mary Lopez	\$388,926	8,649	
		West Total	\$388,926	8,649	
	Steve Mentas Total		\$388,926	8,649	
Grand Total			\$3,286,470	75,258	

	Select Members: RepBroker	×
3 Selected	Q Search By: RepBroker ▼ Contains	•
🗆 RepBroker 🔺	RepBr Long Description	
■ %	%	
□ ?	?	
✓ 300	Nicole Toscano	
301	Patrick Hurley	
302	Mark Fiedler	
✓ 303	Michelle Knapp	
304	John Trasky	
305	Janice Tierney	
306	John Trainor	
307	Guy Nelson	
308	Dean Cizek	
309	Terry Bruno	
312	Mike Hartney	
313	Eleanor Toman	
✓ 315	Mary Lopez	
318	Neil MacDonald	
1 to 16 of 16 ◀ ◀ 1 ▶ ▶		
Clear All OK	Cancel More Help	

Measure Item Filter

You can filter individual measure items by selecting a filter operator and value. For example, you may have a Daily Sales Amount measure item but only want to include amounts greater than or equal to 100,000. You would select the Daily Sales Amount measure and apply a filter of >=100000.

		±.	JPC Daily S	ales by Sh	nip-To Region	า					
		Q 9		123	0 00	🛇 🖸 1 to 16 of 16					
Rows: <u>UPC (</u> Columns: +	Global Number: Al	<u>I</u> ×≯ ∷P	Product × ∷Ship	-To Market 🗙	∷Product Family ×	II Product ABC Clas					
View Filter: 🔡 🍸 🤅	Ship-To Region:	Multiple ×	+								
▲ <u>UPC Global Number</u>	UPC ABC Classif		Daily Sales Amount an 17 to Sep 17	Daily Sales Units Jan 17 to Sep 17							
Asparagus	С		\$104,011	3,769							
Cherries, Bing	В		\$138,881	5,238							
Frozen Lasagna Dinner	A		\$213,883	6,298							
Meatloaf, Frozen	В		\$209,954	6,841							
Applesauce 106oz PL* Peach Slcs LS 106oz BR*	A B	Measure	ITEM FILTER: DAII	X Sales Amoun	TT JAN 17 TO SEP 17	×					
FrtCktail LS 106 oz BR*	B Operate	or	Value								
Peach Slcs LS 12oz BR*	B >=			▼ 100000							
Apples Red Delicious	В										
Sirloin Tips - USDA Grade A			OK	Cancel							
Pork Chops - Butterfly	С										
Ground Round 90% Lean	с										
Sweet Onions, Chopped	С										
Romaine Specialty Salad	A		\$119,237	4,833							
All Others			\$1,949,960	104,894							
Grand Total			\$3,810,042	185,229							

Axis Filter

You can filter the row or column axis. Use this type of filter when you want to filter by multiple measure items or both measure items and attribute relationships. The below example has a filter applied to the rows. The only product data displayed meets the following filter criteria: sales less than \$2,000 and Product ABC Classification equal to B.

			★ s	ales After Re	eturns	
				123	Show All	2 🖸 1 to 30 of
Rows:	Ship-To Region: All	> Product: All	×>	UPC Global Numb	er 🗶 🗄 ABC Classif	ication Code ×
Columns:	+					
/iew Filter:	÷					
<u>Ship-To Region</u>	Product	Prod ABC Classific	ation	Sales Amount Jan 2017 to Sep 2017	Sales Return Amount Jan 2017 to Sep 2017	Sales after Return
<u>i0</u>	Cherry Filling 12 oz BR* 04	В		\$349	(\$804)	0
<u>i0</u>	Cherry Filling 12 oz BR* 08	В		\$699	(\$1,608)	•
50	Cherry Filling 12 oz BR* 00	В		\$384	(\$884)	0
<u>i0</u>	Cherry Filling 12 oz BR* 00	В		\$419	(\$965)	•
50	Cherry Filling 12 oz BR* 08	В		\$454	(\$1,045)	•
50	Cherry Filling 12 oz BR* OF	В		\$489	(\$1,125)	•
<u>50</u>	Cherry Filling 12 oz BR* 00	В		\$524	(\$1,206)	•
<u>50</u>	Cherry Filling 12 oz BR* 0H	В		\$559	(\$1,286)	•
50	Cherny Filling 12 oz BP* 01	R	_	\$504	(\$1.367)	•
Hierarchies	egion		[Mea [Prod	sures].[Data1 (Sales An luct].[Product].Propertion	nount Jan 2017 to Sep es("Prod ABC Classificat	2017)]<2000 Al ▲ ion") = "B"
▲ ¹ ² Product						
Produ						
	Attribute Relationships Prod Long Description					
-	Prod ABC Classification					
▶ ਪ੍ਰਿupc Glob	al Number					
▶ 🖾 ABC Class	sification Code					
▶ 🖾 Product C	Category					
	ns					
Measure Iter						
Measure Iter	ns					
Measure Iter						
Measure Iter	ns					
Measure Iter	ns					
Measure Iter	ns					

Copyright 2019 Silvon Software, Inc. *All rights reserved. (Last Revised: November 2019)*

Relationship and Empty Filter

You can filter rows and columns through their Relationship and Empty Filter properties. That type of filtering takes into consideration the existence of data or lack of data in the database given the levels and measure items for the view.

View Explorer X
$\textcircled{\ } \odot \hookrightarrow \times$
> 🌗 Distribution Sales and Costs 🔶
🌗 🗆 Parameter Groups
> 🍑 🔲 Grid
🗸 🌗 🗖 Rows
Decolumns
🔑 🗆 View Filter
> 📙 🗆 Measure Items
Budget Budget ASP Frozen Sep 2017 to Sep 2017
Actual Sales Sales Units Sep 2017 to Sep 2017
Actual Sales Ext Standard Cost Sep 2017 to Sep 20
Actual Sales Calc Values Sales Ava Sellina Price Se
Properties - Rows X
Drilldown View: Yes 🔻 Actual Sales to Plan Performance
Repeating Values: No
Totals Default: Yes
All Others Default Yes
Relationship Filter: Yes
Empty Filter: Yes
Axis Filter: X

View Filter

You can filter an overall view in relation to members of a particular level through the View Filter section. The data returned in the rest of the view will be just the data relevant to members specified by the View Filter. For example, you have a view listing Lot data, but you want to filter to include only Lot data pertaining to A products. You add the Product ABC Class level to the View Filter section and filter it by A products.

	★ Lot \	/ariance Current Mo	onth &	YTD Last/Curre	ent Yr	
	🗎 🚔 🖾 🗍 🖾	? Q Y 123	0		to 30 of 193	🕽 1 to 6 of 6
Rows: Columns: +	≣Lot: All × +					
View Filter:	I T Product ABC Class:	A × +	_			
Lot	Daily Sales Daily Sales Amount Sep 2016 to Sep 2016	Click Here To Change This Filter Filtered With Members: A	iance L6 vs 7	Daily Sales Daily Sales Amount Jan 2016 to Sep 2016	Daily Sales Daily Sales Amount Jan 2017 to Sep 2017	Variance YTD 2016 vs 2017
19994538954018	\$53,078	\$59,783	\$6,705	\$141,753	\$166,887	\$25,134
19994740954018	\$52,773	\$59,439	\$6,666	\$140,938	\$165,927	\$24,990
19994437954018	\$52,207	\$58,802	\$6,595	\$139,427	\$164,149	\$24,722
19994336954018	\$50,195	\$56,536	\$6,340	\$134,053	\$157,822	\$23,769
19994639954018	\$44,457	\$50,073	\$5,616	\$118,729	\$139,781	\$21,052
19994437954006	\$31,032	\$34,952	\$3,920	\$82,875	\$97,570	\$14,693
19994639954006	\$28,117	\$31,668	\$3,552	\$75,090	\$88,404	\$13,314
19994740954006	\$27,975	\$31,508	\$3,534	\$74,710	\$87,957	\$13,247
19994538954006	\$27,727	\$31,229	\$3,502	\$74,049	\$87,178	\$13,130
19994336954006	\$24,479	\$27,572	\$3,092	\$65,376	\$76,967	\$11,592
19994639954012	\$24,247	\$27,310	\$3,063	\$64,756	\$76,238	\$11,482
19994740954012	\$23,365	\$26,316	\$2,951	\$62,399	\$73,463	\$11,064

Tasks - Adding

Apply a Filter to Levels

- 1. Click the Manage All Filters icon in the grid toolbar to access the Filters window.
- 2. From the Levels tab in Filters window, click the Change Filter icon **T** next to the level name.
- 3. The Select Members window for defining the filter will display. Select the members in the <u>Select</u> or <u>Advanced</u> <u>Select Members window</u>, then click OK.

If you need to apply a different type of filter, click the More button and choose Change Filter Type. Then choose the filter method (User List, Named Set, Expression) from the Select Filter Method window. Use the applicable filter window that displays to set up the filter, and then click OK.

- User List select a list from the Select User List Filter window.
- Named Set select a named set from the Select Named Set Filter window.
- Expression adjust the filter expression in the Expression window.
- 4. You can apply filters to additional levels by clicking their Change Filter icon. Then see Step 2 above. When you are done in the Filters window, click OK.

Note: If you only have one filter to set up, right-click the level in the view and select Filter then Edit. Proceed from there in setting up the filter on that level.

Apply a Filter to Measure Items

- 1. Click the Manage All Filters icon in the grid toolbar to access the Filters window.
- 2. From the Data tab in the Filters window, click the Change Filter icon **T** next to the measure item.
- 3. Select the filter operator and enter a filter value in the Measure Item Filter window. Then click OK.
- 4. You can apply filters to additional measure items by clicking their Change Filter icon. Then see Step 2 above. When you are done in the Filters window, click OK.

Note: If there are levels on the same axis as measure items, you will need to initiate the filtering from the grid. Right-click the measure item in the grid and select Filter then Edit.

Apply a Filter to Totals

- 1. Right-click the caption of a measure item in a Grand Total row or column, and select Filter then Edit.
- 2. Select the filter operator and enter a filter value in the Measure Item Filter window.
- 3. Click OK.

Apply a Relationship or Empty Filter

- 1. Double-click the Rows or Columns folder in view explorer. The Rows or Columns Properties window displays.
- 2. Adjust the Yes and No settings for the filter that you want to set up.

Note: In order for the Empty Filter property to be set to Yes, the Relationship Filter property must be set to Yes.

Apply a View Filter

Option 1

If the level(s) that you want to use for a View Filter already exist in the view, do the following. Otherwise, see Option 2.

- 1. Click the Manage All Filters icon in the grid toolbar to access the <u>Filters window</u>. From the Levels tab in the Filters window, click the Change Filter icon **T** next to the name of the level that will act as the View Filter.
- 2. The Select Members window for defining the filter will display. Select the members in the <u>Select</u> or <u>Advanced</u> <u>Select Members window</u>, then click OK.

If you need to apply a different type of filter, click the More button and choose Change Filter Type, Then choose the filter method (User List, Named Set, Expression) from the Select Filter Method window. Use the applicable filter window that displays to set up the filter, and then click OK.

- User List select a list from the <u>Select User List Filter window</u>.
- Named Set select a named set from the <u>Select Named Set Filter window</u>.
- Expression adjust the filter expression in the Expression window.
- 3. Repeat the prior steps for any other levels that will act as the View Filter.

- 4. Click OK in the Filters window when you are done setting up filters on all applicable levels.
- 5. If the level(s) you just added a filter to were not drilled to yet in the view (not visible yet), they will be moved to the View Filter section for you automatically after you close the Filters window. Otherwise, you will need to manually drag and drop the level(s) from rows or columns to the View Filter section for the view filter to take effect.*

*Note: A level will not act as a filter on the entire view until the level is positioned in the View Filter section. If the level that you filtered is not yet positioned in the View Filter section of the view, drag and drop it to that section from the grid, Navigation Panel, or view explorer.

Option 2

If the level(s) that you want to act as a view filter don't exist in the view yet, follow the steps below to add them to the View Filter section and then filter them.

- 1. In the View Filter section, click the Add Levels To View Filter icon +.
- 2. Use the Add Hierarchies window to add levels and click OK.
- 3. In the View Filter section, click the level you just added.
- 4. The Select Members window for defining the filter will display. Select the members in the <u>Select</u> or <u>Advanced</u> <u>Select Members window</u>, then click OK.

If you need to apply a different type of filter, click the More button and choose Change Filter Type. Then choose the filter method (User List, Named Set, Expression) from the Select Filter Method window. Use the applicable filter window that displays to set up the filter, and then click OK.

- User List select a list from the Select User List Filter window.
- Named Set select a named set from the Select Named Set Filter window.
- Expression adjust the filter expression in the Expression window.
- 5. Repeat steps 3 and 4 for each level you added to the View Filter section.

Apply an Axis Filter

- 1. Click the Manage All Filters icon \mathbf{Y} in the grid toolbar to access the <u>Filters window</u>.
- 2. From the Filters window, click the Axis tab then the Change Filter icon **T** next to the Rows or Columns section (whichever axis you want to filter).
- 3. Use the Expression window that displays to set up the expression for the filter, and then click OK.
- 4. Click OK in the Filters window when you are done setting up the filter.

See also: Example Expressions for Filtering an Axis and Axis Filter Behavior When Levels are on Opposite Axis.

Tasks - Editing

Change Existing Filters

Options for editing filters on different types of items follow. Use the Filters window to make your edits if you have multiple items to edit – for example, if you need to add filters to some items and remove or edit filters on other items. You can make all edit changes for levels, measure items, and a view axis from the Filters window then apply all changes at once.

Axis Filters

- 1. Click the Manage All Filters icon *in the grid toolbar to access the Filters window*.
- 2. From the Filters window, click the Axis tab then Change Filter icon T next to the Rows or Columns section (whichever axis you want to filter).
- 3. Use the Expression window to edit the filter expression, and click OK.
- 4. Change or add other filters if needed.
- 5. Click OK in the Filters window when you're done with all your changes.

Note: In the Navigation Panel, clicking the filter icon **T** next to the name of the filtered axis opens the Expression window for editing that axis filter.

Level Filters

- 1. Click the Manage All Filters icon in the grid toolbar to access the Filters window.
- 2. From the Levels tab in the Filters window, click the Change Filter icon **T** next to the level name.
- 3. The appropriate window for editing the filter will display depending on the filter type (member, named set, expression, user list).
 - Member List adjust the members in the Select or Advanced Select Members window, then click OK.
 - User List select a list from the <u>Select User List Filter window</u>, then click OK.
 - Named Set select a named set from the <u>Select Named Set Filter window</u>, then click OK.
 - Expression adjust the filter expression in the Expression window, then click OK.
- 4. Change or add other filters if needed.
- 5. Click OK in the Filters window when you're done with all your changes.

Note: If you only have one filter to change, click the filter icon **T** next to the filtered level in the view and make changes in the applicable editing window that opens.

Measure Item Filters

- 1. Click the Manage All Filters icon in the grid toolbar to access the Filters window.
- 2. From the Data tab in the Filters window, click the Change Filter icon **T** next to the measure item.

- 3. Use the Measure Item Filter window to edit the filter, and click OK.
- 4. Change or add other filters if needed.
- 5. Click OK in the Filters window when you're done with all your changes.

Note: If you only have one filter to change, click the filter icon **▼** next to the filtered measure item in a view, which opens the <u>Measure Item Filter window</u> for use in editing that filter.

Relationship or Empty Filters

- 1. Double-click the Rows or Columns folder in view explorer. The Rows or Columns Properties window displays.
- 2. Adjust the Yes and No settings for the filter that you need to edit.

Note: In order for the Empty Filter property to be Yes, the Relationship Filter property must be Yes.

Total Filters

- 1. Click the filter icon **T** next to the caption of the measure item in the Grand Total row or column.
- 2. Use the Measure Item Filter window to edit the filter.

Clear Filters

Clear Individual Filter

Click the Manage All Filters icon in the grid toolbar to access the <u>Filters window</u>. From the Filters window, click the Clear Filter icon X next to the item names on the applicable Levels, Data, or Axis tab.

Note: Options for clearing filters also are provided in the pop-up menus for filtered items in the grid. Advanced users and administrators have that option.

Clear All Filters

Right-click any filtered object in the grid (measure item, level, axis), and select Filter then Clear All.

Expressions for Rolling "N" Period Based Views

These examples show how to create period based views that display rolling "N" periods. This is done by creating a level filter on a time hierarchy. The time range property for the view in both examples was set to No.

The first view is a rolling 12 weeks. It has rows comprised of the two levels from the Year Weeks time hierarchy. The Weeks level has a Rolling "12" filter on it that calculates the current week and prior 11 weeks. The filter returns Week 38 back through Week 27 in this example.

I + View Na I → View Fil	ime: <i>Rolling 12</i> V Iter	Veeks for Sales							View Explorer
▼ <u>Year</u>	<u>Company</u> >>	<u>100</u> Fresh to Market Foods, Inc 300 Nicole Toscano Actual Sales Sales Amount		301 Patrick Hurley Actual Sales Sales Amount	Actual Sales Sales	302 Mark Fiedler Actual Sales Sales	Actual Sales Sales	Mich Act Sale	 Rolling 12 Weeks for Sales Parameter Groups Grid Rows Year Weeks Year Weeks Columns Company
<u>2014</u>	Week 38 Week 37 Week 36 Week 35 Week 34 Week 33 Week 32 Week 31 Week 30	\$37,500,634 \$46,125,781 \$65,854,480 \$25,234,922 \$28,554,418 \$28,353,845 \$28,836,934 \$57,479,261 \$29,125,416	Units 786,436 1,769,482 1,391,916 605,479 1,362,328 1,453,150 605,479 1,226,362 620,883	\$2,456,915 \$3,022,006 \$4,083,679 \$1,447,819 \$1,639,609 \$1,626,763 \$1,653,469 \$4,026,631 \$2,399,867	Units 42,399 95,398 73,901 31,502 70,881 75,606 31,502	\$8,587,484 \$11,657,521 \$4,161,486 \$4,708,660 \$4,675,827 \$4,747,902 \$10,257,370	Units 121,890 274,252 203,782 81,892 184,257 196,541 81,892 178,545 96,653	~ ~ ~ ~ ~ ~	 12, RepBroker View Filter Measure Items Actual Sales Sales Amount Actual Sales Sales Units Presentation Charts
Grand Tota	Week 29 Week 28 Week 27 2014 Total	\$20,096,537 1,490,12 \$29,125,416 620,88 \$54,362,560 1,145,87 Total \$450,650,203 13,078,39 \$450,650,203 13,078,39		\$2,399,867 36,00 \$4,122,783 63,67 \$30,535,318 710,80		\$10,683,421		5 5 \$2	

The expression for the level filter is:

COUNT(EXISTS([Time].[Year Weeks].CurrentMember,LASTPERIODS(12,EXISTS([Time].[Year Weeks].[Weeks].members,[Time].[Year Based Weeks Based].[Year Based].[Current Year].[Current Week]).Item(0))))

This expression uses the Year Based Weeks Based hierarchy to determine the Current Week, Current Year.

Expressi	ON - WEEKS	×
View Items and Functions	Expression	
 Hierarchies 12, Year Weeks Year Weeks 12, Company 12, RepBroker Measure Items Functions 	COUNT(EXISTS([Time].[Year Weeks].CurrentMember,LASTPERIODS(12,EXISTS([Time]. [Year Weeks].[Weeks].members,[Time].[Year Based Weeks Based].[Year Based].[Current Year].[Current Week]).Item (0))))	<
OK Valid	ate Cancel Help	

A simple change to the expression changes the view to a rolling 52 weeks. Change the 12 in the expression to 52. It will calculate the current week and prior 51 weeks.

COUNT(EXISTS([Time].[Year Weeks].CurrentMember,LASTPERIODS(52,EXISTS([Time].[Year Weeks].[Weeks].[Weeks].members,[Time].[Year Based Weeks Based].[Year Based].[Current Year].[Current Week]).Item(0))))

Here is the refreshed view after making that change. The filter returns Week 38 of 2014 through Week 39 of 2013.

	<u>Company</u> >>	<u>100</u>						
	Co Long Description	Fresh to Market Foods, Inc						
	RepBroker >>	300		301		302		303
	RepBr Long Description	Nicole Toscano		Patrick Hurley		Mark Fiedler		Michelle Ki
▼ <u>Year</u>	▼ ▼ Weeks	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sa Sales Am
<u>2014</u>	Week 38	\$37,500,634	786,436	\$2,456,915	42,399	\$6,981,694	121,890	\$3,009
	Week 37	\$46,125,781	1,769,482	\$3,022,006	95,398	\$8,587,484	274,252	\$3,701
	Week 36	\$65,854,480	1,391,916	\$4,083,679	73,901	\$11,657,521	203,782	\$5,436
	Week 35	\$25,234,922	605,479	\$1,447,819	31,502	\$4,161,486	81,892	\$2,159
	Week 34	\$28,554,418	1,362,328	\$1,639,609	70,881	\$4,708,660	184,257	\$2,442
James Land	Week 33	\$28,353,845	1,453,150	\$7 \$6,763	75,606	\$4,675,827	196,541	\$2,426
		100 COS V		\sim	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			A.A.
\sim	Week 6	-~~\$22,877,2	419,674	J.Z. Mar		🔪 🚛 189,87ን	<u></u>	\$1,41
	Week 5	\$48,783,399	1,008,329	\$2,751,111	50,302	\$8,322,154	151,923	\$3,01
	Week 4	\$25,906,067	528,655	\$1,494,091	27,466	\$4,132,277	75,453	\$1,59
	Week 3	\$25,906,067	528,655	\$1,494,091	27,466	\$4,132,277	75,453	\$1,59
	Week 2	\$25,906,067	528,655	\$1,494,091	27,466	\$4,132,277	75,453	\$1,59
	Week 1	\$39,534,325	801,316	\$2,394,257	41,991	\$7,370,596	126,292	\$2,68
	2014 Total	\$1,174,876,032	30,041,048	\$76,265,834	1,619,405	\$207,724,492	4,500,057	\$88,94
2013	Week 52	\$13,628,258	272,662	\$900,166	14,525	\$3,238,319	50,839	\$1,09
	Week 51	\$13,628,258	272,662	\$900,166	14,525	\$3,238,319	50,839	\$1,09
	Week 50	\$13,628,258	272,662	\$900,166	14,525	\$3,238,319	50,839	\$1,09
	Week 49	\$13,628,258	272,662	\$900,166	14,525	\$3,238,319	50,839	\$1,09
	Week 48	\$23,706,682	471,237	\$1,916,347	33,655	\$4,924,612	79,136	\$1,77
	Week 47	\$23,706,682	471,237	\$1,916,347	33,655	\$4,924,612	79,136	
	Week 46	\$23,706,682	471,237	\$1,916,347	33,655	\$4,924,612	79,136	\$1,77
	Week 45	\$23,706,682	471,237	\$1,916,347	33,655	\$4,924,612	79,136	\$1,77
	Week 44	\$48,523,380	961,223	\$4,342,602	68,863	\$10,599,859	170,432	\$4,25
	Week 43	\$24,816,698	489,986	\$2,426,255	35,209	\$5,675,247	91,297	\$2,48
	Week 42	\$24,816,698	489,986	\$2,426,255	35,209	\$5,675,247	91,297	
	Week 41	\$24,816,698			35,209			
	Week 40	\$68,146,075						
	Week 39	\$43,329,377					-	
	2013 Total				-			
Grand Tota		\$1,558,664,716	37,749,270	\$109,031,784	2,145,212	\$289,076,959	5,835,071	\$121,49

If you want to see rolling periods in the future, use a negative number for the LASTPERIODS part of the expression. Here is the expression when the 52 is changed to -52. It will calculate the current week and next 51 weeks.

COUNT(EXISTS([Time].[Year Weeks].CurrentMember,LASTPERIODS(-52,EXISTS([Time].[Year Weeks].[Weeks].[Weeks].members,[Time].[Year Based Weeks Based].[Year Based].[Current Year].[Current Week]).Item(0))))

Here is the refreshed view after making that change. The filter returns Week 37 of 2015 through Week 38 of 2014. The future weeks for actual sales do not have data yet, so those cells are empty in the view. This type of filter would be useful in views that contain measures that have anticipated future data, such as budget or forecast measures.

	Company >>	<u>100</u>						
	Co Long Description	Fresh to Market Foods, Inc						
	RepBroker >>	300		301		302		303
	RepBr Long Description	Nicole Toscano		Patrick Hurley		Mark Fiedler		Michelle Knapp
▼ <u>Year</u>	Veeks	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount
2015	Week 37							
	Week 36							
	Week 35							
	Week 34							
	Week 33							-
-A	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	A Am	\sim	$\sim\sim\sim$	$\neg \Lambda$	A	<u> </u>	\sim
1			\sim	· ·····	$\overline{}$	-	مىر يىد	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Week 5		$\sim$	$\sim$	$\sim$		$\sim$	<b>b</b> -
	Week 4							
	Week 3							
	Week 2							
	Week 1							
	2015 Total							
2014	Week 52							
	Week 51							
	Week 50							
	Week 49							
	Week 48							
	Week 47							
	Week 46							
	Week 45							
	Week 44							
	Week 43							
	Week 42							
	Week 41							
	Week 40	\$37,500,634	786,436	\$2,456,915	42,399	\$6,981,694	121,890	\$3,009,195
	Week 39	\$37,500,634	786,436	\$2,456,915	42,399	\$6,981,694	121,890	\$3,009,195
	Week 38	\$37,500,634	786,436	\$2,456,915	42,399	\$6,981,694	121,890	\$3,009,195
	2014 Total	\$112,501,903	2,359,309	\$7,370,746	127,197	\$20,945,082	365,669	\$9,027,586
Grand Tota		\$112,501,903				\$20,945,082	-	\$9,027,586

Copyright 2019 Silvon Software, Inc. *All rights reserved. (Last Revised: November 2019)* 

# **Expressions for Filtering Levels**

Expression filters that reference member values and attribute relationships were used to filter levels in the following examples. The levels referenced in the filters need to be visible in the view in order for the filters to impact the view.

- Single Member in Expression
- <u>Multiple Members in Expression</u>
- <u>Attribute Relationships in Expression</u>

Note: These same types of expressions can be used when creating dynamic user lists.

### Single Member in Expression

This expression returns Customer Sold-To members with values greater than 150280. You can adjust the filter quickly to return different results by changing out the > symbol in the expression for other symbols (such as <) or by changing the "150280" in the expression to a different value.

[Customer Sold-To].[Customer Sold-To].CurrentMember.Name > "150280"

III + View Name: Expression Filter with Member									
↓ → View Filter									
	Due due to Due ad the to	001					002		
	Product Brand >>	<u>001</u>					<u>002</u>		
	PBrnd Long Description	Тір Тор					Dew Dr		
T <u>Customer</u> Sold-To	SIdTo Long Description	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Sales Sales Amount Jan 2014 to Sep 2014	YTD % of Total	Actual Sales Sales Units Sep 2014 to Sep 2014	Actual Sales Sales Amount Sep 2014 to Sep 2014	Actual S Sales U Jan 201 Sep 20		
<u>150290</u>	Montelissi Distribution	43,082	\$2,462,797	10%	5,130	\$319,989	4:		
<u>150300</u>	Auburn Providers	43,387	\$2,658,087	10%			6		
<u>150310</u>	Maple Tree Foods	36,752	\$2,266,995	9%	12,409	\$797,832	6:		
<u>150320</u>	Quebec Foods	30,795	\$1,653,760	6%	5,846	\$383,155	41		
<u>150330</u>	Canadian Imports	37,630	\$2,453,227	9%	5,697	\$382,779	8		
<u>150340</u>	Alberta Foods	41,301	\$2,415,657	9%			6-		
<u>150350</u>	Chicago's Finest	54,234	\$3,468,513	13%	11,812	\$782,800	34		
<u>150360</u>	St. Louis Distributors	41,581	\$2,296,830	9%	6,085	\$374,624	4′		
<u>150370</u>	Southwest Foods	34,992	\$2,080,132	8%	17,718	\$1,141,874	4:		
<u>150380</u>	Packingham Foods	50,805	\$2,910,259	11%	5,816	\$384,567	7:		
150390	Pacific Providers	23,249	\$1,205,925	5%			1		
Grand Total		437,809	\$25,872,183	100%	70,514	\$4,567,621	59		

### Multiple Members in Expression

This expression filter returns Customer Sold-To members in a range that is greater than or equal to 150280 and less than or equal to 150350.

[Customer Sold-To].[Customer Sold-To].CurrentMember.Name >= "150280" AND [Customer Sold-To].[Customer Sold-To].CurrentMember.Name <= "150350"

EII + View Name:	Expression Filter with	h Member					
↓ → View Filter							
	Product Brand >>	<u>001</u>					<u>002</u>
	PBrnd Long Description	Тір Тор					Dew Dro
T <u>Customer</u> <u>Sold-To</u>	SIdTo Long Description	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Sales Sales Amount Jan 2014 to Sep 2014	YTD % of Total	Actual Sales Sales Units Sep 2014 to Sep 2014	Actual Sales Sales Amount Sep 2014 to Sep 2014	Actual Sa Sales Un Jan 2014 Sep 201
150280	New York Foods	32,484	\$2,075,524	11%	6,085	\$358,317	48
<u>150290</u>	Montelissi Distribution	43,082	\$2,462,797	13%	5,130	\$319,989	45
150300	Auburn Providers	43,387	\$2,658,087	14%			69
<u>150310</u>	Maple Tree Foods	36,752	\$2,266,995	12%	12,409	\$797,832	65
<u>150320</u>	Quebec Foods	30,795	\$1,653,760	9%	5,846	\$383,155	46
150330	Canadian Imports	37,630	\$2,453,227	13%	5,697	\$382,779	81
<u>150340</u>	Alberta Foods	41,301	\$2,415,657	12%			64
150350	Chicago's Finest	54,234	\$3,468,513	18%	11,812	\$782,800	34
Grand Total		319,666	\$19,454,561	100%	46,979	\$3,024,872	456

### Attribute Relationships in Expression

This filter returns Product Category members that have the text 'fruit' in their PCat Long Description attribute relationship.

(INSTR(1, [Product Category].[Product Category].CurrentMember.Properties("PCat Long Description"), "Fruit") <> 0)

III + View Name: <i>Expression Filter with AR</i> ↓→ View Filter							
Y <u>Product</u> <u>Category</u>	PCat Long Description	Actual Sales Sales Amount Wk 1 2014 to Wk 38 2014	% of Total	Actual Sales Sales Units Wk 1 2014 to Wk 38 2014	% of Total	Actual Sales Sales Amount Wk 38 2014 to Wk 38 2014	Actual Sales Sales Units Wk 38 2014 to Wk 38 2014
201	Canned Fruit	\$1,979,809,747	83.39%	45,351,254	83.38%	\$58,950,296	1,123,590
<u>204</u>	Fresh Fruit	\$294,627,014	12.41%	7,243,387	13.32%	\$11,084,764	223,802
207	Frozen Fruit Products	\$99,856,357	4.21%	1,794,107	3.30%	\$3,193,268	45,582
Grand Tota		\$2,374,293,118	100.00%	54,388,749	100.00%	\$73,228,327	1,392,973

# **Expressions for Filtering an Axis**

The following examples show an axis filter that uses just measure items and an axis filter that uses a measure item and attribute relationship. A table containing more example expressions follows these two examples.

Note that expressions that reference attribute relationships should use an IIF statement to check whether or not the level for the attribute relationship is visible. The second example that follows shows the impact of using an IIF statement.

- Example 1 Two Measure Items in Axis Filter
- Example 2- Measure Item and Attribute Relationship in Axis Filter
- More Example Expressions

### Example 1 - Two Measure Items in Axis Filter

This axis filter on columns returns columns where Avg Selling Price is greater than or equal to \$75.00 and Profit is greater than \$50,000.

[Measures].[Data6 (Avg Selli	ing Price)]>=75 AND [Measures].[Data	8 (Profit)]>50000
------------------------------	--------------------------------------	-------------------

	Sight View Name: Axis Filts Y → View Filter [Measures].[Data6 (Avg Selling Price)]>75 AND [Measures].[Data8 (Profit)]>50000						
Product >>	FrtCktail 6oz LnchPk BR* 0A	Pear 6oz LnchPk LS 0B	Peach 6oz LnchPk BR* 0B	FrtCktail 6oz LnchPk BR* 0B	FrtCktail 6oz LnchPk BR*		
Sales Amount	\$216,087	\$249,990	\$240,896	\$432,175	\$237,6		
Sales Return Amount	(\$23,795)	(\$22,981)	(\$19,987)	(\$47,591)	(\$26,1		
Sales After Returns	\$192,292	\$227,009	\$220,909	\$384,584	\$211,5		
Sales Units	2,545	2,840	2,738	5,089	2,1		
Sales Return Units	(331)	(268)	(233)	(590)	(3.		
Avg Selling Price	\$84.92	\$88.02	\$87.98	\$84.92	\$84		
Actual Cost	\$138,142	\$173,177	\$154,078	\$276,284	\$151,9		
Profit	\$54,150	\$53,832	\$66,831	\$108,299	\$59,5		

Here is the Expression window for the filter.

Expre	SSION - COLUMNS	×
View Items and Functions	Expression	
🕨 鷆 Hierarchies	[Measures].[Data6 (Avg Selling Price)]>75 AND [Measures].	
a 🌗 Measure Items	[Data8 (Profit)]>50000	$\sim$
🔯 Data1 (Sales Amount)		
🔯 Data2 (Sales Return Amount)		
🕅 Data7 (Sales After Returns)		
🔯 Data4 (Sales Units)		
🔯 Data3 (Sales Return Units)		
123 Data6 (Avg Selling Price)		
123 Data5 (Actual Cost)		
Data8 (Profit)		
Functions		
		_

### Example 2 - Measure Item and Attribute Relationship in Axis Filter

This axis filter on rows returns rows where the Product sales for the current period of the current year are greater than \$150,000 and the Prod ABC Classification for the Product is A. The first part of the expression contains the sales measure item criteria, and the second part contains the attribute relationship criteria.

The IIF statement in the second part checks that the level for the attribute relationship referenced in the expression is visible in rows. In this case, the level is visible so Stratum. Viewer considers that filter condition when executing the filter. If the level had not been visible, the condition would have been ignored while executing the filter.

[Measures].[Data2 (Current Period This Year)]>150000 and IIF([Product].[Product].CurrentMember.Level.Name="Product",[Product].[Product].Properties("Prod ABC Classification")="A",1)

**Note:** The portion of the above MDX that checks for the level visibility references the name of the dimension and hierarchy for the level -- in this case [Product].[Product]. The hierarchy name is needed in cases where there are multiple hierarchies within the same dimension.

Image: Axis Filter          Image: Axis Filter       [Measures].[Data2 (Current Period This Year)]>150000 and         IIF([Product].[Product].CurrentMember.Level.Name="Product",         IIF([Product].[Product].Properties("Prod ABC Classification")="A",1)								
RepBroker	Product	Prod ABC Classification	Current Period Last Year	Current Period This Year	YTD Last Year	YTD Current Year		
300	Pear 6oz LnchPk LS 5B	A	\$321,653	\$255,774	\$13,178,521	\$7,500,585		
	Pnappl Sics 12oz PL* 5B	A	\$208,384	\$168,596	\$9,366,632	\$5,309,002		
	Pear 6oz LnchPk LS 5D	A	\$192,992	\$153,464	\$7,907,113	\$4,500,351		
	Pear 6oz LnchPk LS 5E	A	\$209,074	\$166,253	\$8,566,039	\$4,875,381		
	Pear 6oz LnchPk LS 5F	A	\$225,157	\$179,042	\$9,224,965	\$5,250,410		
	Pear 6oz LnchPk LS 5G	A	\$241,240	\$191,831	\$9,883,891	\$5,625,439		
	Pear 6oz LnchPk LS 5H	A	\$257,322	\$204,619	\$10,542,817	\$6,000,468		
	Pear 6oz LnchPk LS 5I	A	\$273,405	\$217,408	\$11,201,743	\$6,375,498		
	Pear 6oz LnchPk LS 53	A	\$289,487	\$230,197	\$11,860,669	\$6,750,527		
	Pnanni Sics 12oz PI * 51	Δ	\$187 545	\$151 736	\$8 429 969	\$4 778 101		

This is the Expression window for the filter.

EXPRESSION - ROWS X				
View Items and Functions	Expression			
🕨 퉬 Hierarchies	[Measures].[Data2 (Current Period This Year)]>150000 and			
a 🌗 Measure Items	<pre>IIF([Product].[Product].CurrentMember.Level.Name="Product", [Product].[Product].Properties("Prod ABC Classification")</pre>			
🔯 Data1 (Current Period Last Year)	="A",1)			
🔯 Data2 (Current Period This Year)				
123 Data3 (YTD Last Year)				
🔯 Data4 (YTD Current Year)				
Functions				
man particular share	many particulation			

Here's what the view would look like if you were to drill up to RepBroker. Only the [Measures].[Data2 (Current Period This Year)]>150000 part of the axis filter expression is executed since Product is no longer visible.

EEE + View Nar	III + View Name: Axis Filter on Rows					
T ↓ → View	Filter					
	Course the start	Comment Devied	VTD	1000		
RepBroker	Last Year	Current Period This Year	YTD Last Year	YTD Current Year		
300	\$43,329,377	\$37,500,634	\$2,034,499,253	\$1,161,247,774		
301	\$3,726,139	\$2,456,915	\$132,397,108	\$75,365,668		
302	\$7,699,948	\$6,981,694	\$352,265,971	\$204,486,173		
303	\$3,433,655	\$3,009,195	\$153,524,572	\$87,846,078		
<u>304</u>	\$2,283,987	\$2,626,736	\$155,507,823	\$89,707,395		
305	\$17,916,802	\$15,022,164	\$877,750,849	\$510,513,452		
306	\$5,058,991	\$4,504,960	\$196,770,700	\$114,729,358		
307	\$1,409,623	\$1,117,367	\$57,488,785	\$33,992,154		
308	\$4,269,497	\$3,347,914	\$158,242,107	\$89,149,261		
309	\$2,573,712	\$2,815,224	\$127,422,712	\$72,776,501		
<u>312</u>	\$11,923,874	\$10,408,297	\$548,158,596	\$315,109,984		
313	\$16,772,903	\$14,197,829	\$735,352,351	\$418,232,088		
315	\$4,062,845	\$3,499,178	\$180,284,697	\$105,410,011		
318	\$950,798	\$1,471,982	\$69,800,032	\$40,668,788		
Grand Total	\$125,412,150	\$108,960,090	\$5,779,465,556	\$3,319,234,685		

# More Example Expressions

Desired Results	Example Axis Filter
For all levels, Average Selling Price is >= 75 and Profit > 50,000.	[Measures].[Data6 (Avg Selling Price)]>=75 And [Measures].[Data8 (Profit)]>50000
When at Product level, will return rows where Prod ABC Classification = "A" AND Actual Sales Sales Units Jan 2014 to Sep 2014 is > 150,000. When at any other level - Actual Sales Sales Units Jan 2014 to Sep 2014 is > 150,000.	[Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)]>150000 and IIF([Product].[Product].CurrentMember.Level.Name="Pr oduct",[Product].[Product].Properties("Prod ABC Classification")="A",1)

Only for the Product level, return rows where Prod ABC Classification = "A" AND Actual Sales Sales Units Jan 2014 to Sep 2014 is > 150,000. When at any other level – No filter applied.	IIF([Product].[Product].CurrentMember.Level.Name="Pr oduct", IIF ([Product].[Product].Properties("Prod ABC Classification")="A" AND [Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)]>150000, 1,0), 1)
When at Product level, will return rows where Actual Sales Sales Units Jan 2014 to Sep 2014 is > 150,000. When at any other level - Actual Sales Sales Units Jan 2014 to Sep 2014 is > 10,000,000.	IIF([Product].[Product].CurrentMember.Level.Name="Pr oduct", IIF ([Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)]>150000, 1,0), [Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)] > 10000000)
When at Product level, will return rows where Prod ABC Classification = "A" AND Actual Sales Sales Units Jan 2014 to Sep 2014 is > 150,000. When at any other level - Actual Sales Sales Units Jan 2014 to Sep 2014 is > 10,000,000.	IIF([Product].[Product].CurrentMember.Level.Name="Pr oduct", IIF ([Product].[Product].Properties("Prod ABC Classification")="A" AND [Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)]>150000, 1,0), [Measures].[Data1 (Actual Sales Sales Units Jan 2014 to Sep 2014)] > 10000000)

# **Examples of Sorts and Filters on Totals**

This view displays year to date (YTD) sales data by Sales Director and UPC Global Number. A filter has been applied to the total column for the current year YTD sales. The result is a view where the only detail sales data on display for each Sales Director is that of Products that make up the top 20 percent of total YTD sales.

	📑 🖸 🏝 🕅 📦 🚺 🕜 🕺 🔂 🔂 🔂 🖓						
III + View Name: Top Performing UPC for YTD by Director							
↓→ View Filter						1	
	Sales Dir >>	Helen Briggs		Steve Mentas	Top F	Percent 20 Ital	
UPC Global Number	UPC Long Description	Actual Sales YTD 2014	Actual Sales YTD 2013	Actual Sales YTD 2014	Actual Sales YID 2013	Actual Sales	ctual Sales YTD 2013
<u>0 - 13800 - 30321 - 9</u>	Frozen Lasagna Dinner	\$67,474,884	\$114,640,211	\$52,791,395	\$9 <mark>0</mark> ,799,773	\$120,266,278	205,439,985
<u>0 - 13800 - 78934 - 9</u>	Meatloaf, Frozen	\$62,969,705	\$109,019,253	\$53,046,268	\$88,655,860	\$116,015,974	\$197,675,113
<u>0 - 24000 - 12431 - 4</u>	Applesauce 106oz PL*	\$61,198,544	\$102,926,472	\$39,810,495	\$66,757,441	\$101,009,039	\$169,683,913
<u>0 - 02749 - 25408 - 6</u>	Asparagus	\$54,327,537	\$90,241,412	\$36,101,356	\$61,306,990	\$90,428,893	\$151,548,403
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$50,270,451	\$84,207,881	\$33,523,552	\$56,420,498	\$83,794,003	\$140,628,378
<u>0 - 02749 - 99267 - 6</u>	Cherries, Bing	\$42,383,321	\$73,262,012	\$31,376,355	\$52,936,770	\$73,759,676	\$126,198,782
Grand Total		\$338,624,442	\$574,297,241	\$246,649,422	\$416,877,332	\$585,273,863	\$991,174,573

In this example, quarterly sales data is displayed by Distribution Center Warehouse and Customer Ship-To. A filter has been applied to the total column for the current year, current quarter sales. The result is a view where the detail data on display is Customer Ship-To's with total sales greater than \$2,000,000. Also, a sort was applied to the same total column to organize the Customer Ship-To's in descending order.

	ılı 🕜	6	3000 1 to 50	of 79	1 to 6 of 6	Viewer 🗸
III + View Name: <i>Ship-To Analysis I</i> ↓ → View Filter	by Warehouse			_		-
Distribution Center Warehouse >>	<u>19</u>		<u>21</u>		>= 2000000 Total	
Customer Ship-To	Actual Sales Amount Q3 2014	Actual Sales Amount Q3 2013	Actual Sales Amount Q3 2014	Actual Sales Amount Q3 2013	Y ▼ Actual Sales Amount Q3 2014	Actual Sales Amount Q3 2013
Wilder Foods St Louis MO WOB	\$3,784,881	\$3,784,881	\$4,611,329	\$4,611,829	\$8 306 700	\$8,396,209
Wilder Foods St Louis MO WOJ	\$3,406,393	\$3,406,393	\$4,150,196	\$4,150,196	\$7,556,588	\$7,556,58
Wilder Foods St Louis MO WOI	\$3,217,149	\$3,217,149	\$3,919,629	\$3,919,629	\$7,136,778	\$7,136,77
Wilder Foods St Louis MO	\$3,045,002	\$3,045,002	\$3,701,887	\$3,701,887	\$6,746,889	\$6,746,88
Wilder Foods St Louis MO WOH	\$3,027,905	\$3,027,905	\$3,689,063	\$3,689,063	\$6,716,967	\$6,716,96
Wilder Foods St Louis MO WOG	\$2,838,660	\$2,838,660	\$3,458,496	\$3,458,496	\$6,297,157	\$6,297,15
Wilder Foods St Louis MO WOF	\$2,649,416	\$2,649,416	\$3,227,930	\$3,227,930	\$5,877,347	\$5,877,34
Wilder Foods St Louis MO WOE	\$2,460,172	\$2,460,172	\$2,997,364	\$2,997,364	\$5,457,536	\$5,457,53
Wilder Foods Buffalo NY WOB	\$2,537,763	\$2,537,763	\$2,548,447	\$2,548,447	\$5,086,210	\$5,086,21
Wilder Foods St Louis MO WOD	\$2,270,928	\$2,270,928	\$2,766,797	\$2,766,797	\$5,037,726	\$5,037,72
Wilder Foods St Louis MO WOC	\$2,081,684	\$2,081,684	\$2,536,231	\$2,536,231	\$4,617,915	\$4,617,91
Wilder Foods Buffalo NY WOJ	\$2,283,987	\$2,283,987	\$2,293,602	\$2,293,602	\$4,577,589	\$4,577,58
Wilder Foods Buffalo NY WOI	\$2.157.098	\$2.157.098	\$2.166.180	\$2.166.180	\$4.323.278	\$4.323.27

# Advanced Select Members Window

	Advanced Select Members	: UPC GLOBAL NUMBER	×				
apple	×Q	Search By: UPC Long Description	Starts with				
UPC Long Description 🔺	UPC Global Number	UPC ABC Classification					
Apple Filling 106oz BR*	0 - 24000 - 12422 - 4	В	Add				
Apple Filling 106oz PL*	0 - 24000 - 12529 - 4	A	Add All				
Apple Filling 12oz BR*	0 - 24000 - 12522 - 4	В					
Apple Filling 12oz PL*	0 - 24000 - 12429 - 4	Δ					
Apples Red Delicious	0 - 39484 - 92837 - 1	в					
1 to 5 of 5  ◀ ◀ 1 ▶ ▶							
UPC Long Description	UPC Global Number	UPC ABC Classification					
Applesauce 106oz BR*	0 - 24000 - 12430 - 4	А	Clear				
Applesauce 106oz PL*	0 - 24000 - 12431 - 4	А	Clear All				
Applesauce 12oz BR*	0 - 24000 - 12530 - 4	а 👩	4 Selected				
Applesauce 12oz PL*	0 - 24000 - 12531 - 4	^A 3					
1 to 4 of 4  ◀ ◀ 1 ▶ ▶		-					
<u></u>							
	OK Cancel	More 4	Help				
members to be used or to help build an ex         Note: The window al	in the member list. That lis pression. so is used when administra						
Click the search icon	A 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.						
relationship t search to cor	• 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 exam were retrieved.	ple, we searched for UPC	long descriptions starting with "app	ble" and 5 items				

		Advanced Select Members	: UPC GLOBAL NUMBER	×
	apple	×Q	Search By: UPC Long Description	✓ Starts with ✓
	UPC Long Description	UPC Global Number	UPC ABC Classification	
	Apple Filling 106oz BR*	0 - 24000 - 12422 - 4 0 - 24000 - 12529 - 4	B A	Add All
	Apple Filling 12oz BR*	0 - 24000 - 12522 - 4 0 - 24000 - 12429 - 4	B A	
	☐ Apples Red Delicious 1 to 5 of 5    ◀ ◀ 1 ▶ ▶	0 - 39484 - 92837 - 1	В	
2		s then click Add to move	mbers returned by your search. the selected members to the b various member selections.	
	<ul> <li>members to a filter a</li> <li>Click the checkbox in the list at once.</li> <li>Use Shift+Click as a</li> </ul>	and close the window. In the heading area to se	window then clicking OK will ad elect or deselect all members or range of consecutive members ast item).	n all pages in (click the first
	Click Add All to add bottom portion of the Columns in this area are sort ABC Classification column a	e window. t and drag/drop enabled nd dragged it to the first	bers, from all pages, to the sele . In the following example, we of position. We also clicked the S	clicked the UPC
	<ul> <li>Click Add All to add bottom portion of the Columns in this area are sort</li> </ul>	e window. t and drag/drop enabled nd dragged it to the first iding to descending.	. In the following example, we c position. We also clicked the S	clicked the UPC Sort icon and
	Click Add All to add bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent	e window. t and drag/drop enabled nd dragged it to the first iding to descending.	. In the following example, we oposition. We also clicked the S	clicked the UPC
	Click Add All to add bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent	e window. t and drag/drop enabled nd dragged it to the first iding to descending. Advanced Select Members: T	. In the following example, we oposition. We also clicked the S JPC GLOBAL NUMBER Search By: UPC Long Description	clicked the UPC Sort icon and
	Click Add All to add bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent apple UPC ABC Classification	e window. t and drag/drop enabled nd dragged it to the first uding to descending. Advanced Select Members: T Q UPC Long Description	. In the following example, we of position. We also clicked the S <b>JPC GLOBAL NUMBER</b> Search By: UPC Long Description V UPC Global Number	Clicked the UPC Sort icon and
	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent changed the sort from ascent be been been been been been been bee</li></ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. Advanced Select Members: T Q UPC Long Description Apple Filling 106oz BR*	. In the following example, we of position. We also clicked the S	clicked the UPC Sort icon and
	Click Add All to add bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent apple UPC ABC Classification	e window. t and drag/drop enabled nd dragged it to the first uding to descending. Advanced Select Members: T Q UPC Long Description	. In the following example, we of position. We also clicked the S <b>JPC GLOBAL NUMBER</b> Search By: UPC Long Description UPC Global Number	Clicked the UPC Sort icon and
	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent changed the sort from ascent because the classification </li> <li>apple</li> <li>upc ABC Classification </li> </ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. ADVANCED SELECT MEMBERS: I UPC Long Description Apple Filling 106oz BR* Apple Filling 12oz BR*	. In the following example, we oposition. We also clicked the S  JPC GLOBAL NUMBER Search By: UPC Long Description UPC Global Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4	Clicked the UPC Sort icon and
	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent changed the sort from ascent be been been been been been been bee</li></ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. ADVANCED SELECT MEMBERS: I UPC Long Description Apple Filling 106oz BR* Apple Filling 12oz BR* Apples Red Delicious	. In the following example, we of position. We also clicked the S JPC GLOBAL NUMBER Search By: UPC Long Description  UPC Global Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4 0 - 39484 - 92837 - 1	Sort icon and
	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascentiate apple</li> <li>upc ABC Classification </li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>A</li> <li>A</li> <li>1 to 5 of 5   &lt; 1   &gt;  </li> <li>Use the paging arrows and li</li> </ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. ADVANCED SELECT MEMBERS: I UPC Long Description Apple Filling 106oz BR* Apple Filling 12oz BR* Apples Red Delicious Apple Filling 106oz PL* Apple Filling 12oz PL* inks at the bottom of the	. In the following example, we oposition. We also clicked the S JPC GLOBAL NUMBER Search By: UPC Long Description ✓ UPC Clobal Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4 0 - 39484 - 92837 - 1 0 - 24000 - 12529 - 4	Clicked the UPC Sort icon and
	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent changed the sort from ascent upc ABC Classification</li> <li>apple</li> <li>upc ABC Classification</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>A</li> <li>A</li> <li>1 to 5 of 5</li> <li>4 1 + 1</li> <li>Use the paging arrows and li Selections made on various</li> </ul>	e window. t and drag/drop enabled nd dragged it to the first ading to descending. ADVANCED SELECT MEMBERS: U Q UPC Long Description Apple Filling 106oz BR* Apple Filling 12oz BR* Apples Red Delicious Apple Filling 106oz PL* Apple Filling 12oz PL* inks at the bottom of the pages are retained as yes	. In the following example, we of position. We also clicked the S JPC GLOBAL NUMBER Search By: UPC Long Description ✓ UPC Global Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4 0 - 24000 - 12529 - 4 0 - 24000 - 12529 - 4 0 - 24000 - 12429 - 4 list to move between pages of ou move between pages in the ists, etc.), there is a single adm	Clicked the UPC Sort icon and
3	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascent apple</li> <li>upc ABC Classification </li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>Columns in this area are sort and the sort from ascent apple</li> <li>Upc ABC Classification </li> <li>B</li> <li>Columns in the sort from ascent and the sort from ascent apple</li> <li>Upc ABC Classification </li> <li>B</li> <li>Columns in the sort from ascent and the sort</li></ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. ADVANCED SELECT MEMBERS: I Q UPC Long Description Apple Filling 106oz BR* Apple Filling 106oz BR* Apples Red Delicious Apple Filling 106oz PL* Apple Filling 12oz PL* inks at the bottom of the pages are retained as yes isplay lists (views, user I ndow that controls the pages members selected for the	. In the following example, we oposition. We also clicked the S  DPC GLOBAL NUMBER Search By: UPC Long Description UPC Global Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4 0 - 39484 - 92837 - 1 0 - 24000 - 12529 - 4 0 - 24000 - 12429 - 4  list to move between pages of ou move between pages in the ists, etc.), there is a single admage size. e member list. A count under the	clicked the UPC Sort icon and
3	<ul> <li>Click Add All to add bottom portion of the bottom portion of the Columns in this area are sort ABC Classification column a changed the sort from ascenting apple</li> <li>upc ABC Classification </li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>B</li> <li>A</li> <li>A</li> <li>1 to 5 of 5   ( 1 )  </li> <li>Use the paging arrows and li Selections made on various</li> <li>Note: For all windows that di setting on the Application windows the paging arrows and page 100 mm and 100 mm and</li></ul>	e window. t and drag/drop enabled nd dragged it to the first uding to descending. ADVANCED SELECT MEMBERS: I UPC Long Description Apple Filling 106oz BR* Apple Filling 12oz BR* Apples Red Delicious Apple Filling 106oz PL* Apple Filling 12oz PL* inks at the bottom of the pages are retained as yes isplay lists (views, user Indow that controls the page members selected for the nembers are included in ckboxes next to member	. In the following example, we oposition. We also clicked the S  DPC GLOBAL NUMBER Search By: UPC Long Description UPC Global Number 0 - 24000 - 12422 - 4 0 - 24000 - 12522 - 4 0 - 39484 - 92837 - 1 0 - 24000 - 12529 - 4 0 - 24000 - 12429 - 4  list to move between pages of ou move between pages in the ists, etc.), there is a single admage size. e member list. A count under the	Clicked the UPC Sort icon and

	<ul> <li>Use the checkbox in the heading area to select or deselect all members on all pages in the list at once.</li> </ul>							
	•	<ul> <li>Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first</li> </ul>						
		item, then press Shift key while clicking the last item).						
	•							
				filter and two have been selec				
		on of clearing them.	After the Clear button is o	clicked, the filter will contain on	ly two items.			
		C ABC Classification 🔻	UPC Long Description	UPC Global Number				
	Δ Α		Applesauce 106oz BR*	0 - 24000 - 12430 - 4	Clear			
	A		Applesauce 106oz PL*	0 - 24000 - 12431 - 4	Clear All			
			Applesauce 12oz BR*	0 - 24000 - 12530 - 4	4 Selected			
	✓ A 1 to 4	of 4  ◀ ◀ 1 ▶ ▶	Applesauce 12oz PL*	0 - 24000 - 12531 - 4				
	1 00 4							
			OK Cancel	More	Help			
	Use the	e paging arrows and	I links at the bottom of the	e list to move between pages o	of members.			
				ou move between pages in the				
				lists, etc.), there is a single ad	ministrative			
	setting	on the Application v	vindow that controls the p	bage size.				
	More	Click the More b	utton for additional featur	es:				
4	•							
	_	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.							
	• <b>Display Options</b> – 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							
	• <b>Paste</b> – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building.							
			, ,	1				
			ge Filter Type					
			Filter					
			: Select					
			ay Options					
		Paste	-	1				
		Cancel	More					
1		E		-				

# **Display Options Window for Select and Advanced Select Members Windows**

	DISPLAY OPTIONS	×
Display Columns	^	
Prod Short Description		^
Prod Long Description	-	- 11
Product		- 11
Prod ABC Classification		- 11
Prod Commodity Code		- 11
Prod Current List Price		- 11
Prod Discontinue Date		- 11
Prod Effective Date		- 11
Drod End Droduct 0 or 1		~
	OK Cancel	

**Display Columns** - Select or deselect columns to control the information that displays on the <u>Select Members</u> and <u>Advanced Select Members windows</u>. Up to 10 columns of information can be displayed. The columns that display by default depend on where you accessed the window from within Stratum. Viewer. If accessed from views, the default columns are what's displayed in the grid. Up to the first 10 attribute relationships used in the view will be used as display columns. If accessed from windows such as User List Maintenance, the default columns are determined by administrator settings in the Dimension window. Up to the first 10 attribute relationships selected in administrator settings will be used as display columns.

**OK** - Clicking OK applies the changes for the current session only in the Select and Advanced Select Members windows. When you toggle back and forth between the two windows, the changes will be reflected in both windows. Once you exit the windows, display options return to their defaults.

# **Expression Window for Filters**

Exp	PRESSION - PRODUCT	×
View Items and Functions for Expression: Hierarchies Product Product	Expression <u>(Examples):</u> (INSTR(1, [Product].[Product].CurrentMember Description"), "Apple") <> 0)	
<ul> <li>Attribute Relationships</li> <li>Prod Long Description</li> <li>Members</li> <li>Customer Ship-To</li> <li>Customer Ship-To</li> <li>Product ABC Class</li> <li>Product Brand</li> <li>Product Family</li> <li>Product Category</li> <li>Measure Items</li> <li>MDX Functions</li> <li>Stratum.Viewer Functions</li> </ul>		
Filter Type OK	Validate Cancel	Help

View Items and Functions for Expression – Use this part of the window to select items or functions to use in building an expression for a filter on a level or an axis filter in the view. Click items or drag and drop them to use them in the Expression section. Objects available to work with as you build your filter expression are described below. Hierarchies Folder - Hierarchies, levels, and attribute relationships that are part of the view definition are in list in the Hierarchies folder. They appear in the same order as in the view explorer and regardless of whether or not they are visible or actively showing in the grid. The Levels folder can be expanded to see the Attribute Relationships and Members folders. If attribute relationships were selected for the level, they will display when the Attribute Relationships folder is expanded. Levels and Attribute Relationships - Click a level or attribute relationship to add it to the expression. Objects can also be drag and dropped into the Expression portion of the window. **Members** - Another tool for building the expression is the Members folder. Click it to access the Select Filter Method window. From there, you can access the Select or Advanced Select Members window. This allows you to select specific members for the expression. Or, you can access the Named Set window and select a named set for the expression in cases when you are working with a single level time dimension.

When you add objects in this manner to the expression, they are added in MDX format. That format includes a reference to the object dimension and hierarchy. The standard MDX format for objects commonly used in expressions follows.

- Level [Dimension name].[Hierarchy name].[Level name].members
- Attribute Relationship [Dimension name].[Hierarchy name].Properties("Attribute Relationship name")
- Member [Dimension name].[Hierarchy name].[Level name].[Member value]

**Measure Items Folder** – The Measure Items folder lists all the measure items associated with the view. Each measure item displays as Name (Caption). The name is the unique identifier associated with the measure item, which can be seen in the Properties window for the measure item. The caption makes it user friendly. They appear in the same order as in the view explorer.

You can include measure items as part of the expression using any of the following methods:

- Select measure items by clicking or drag and drop.
- Key in measure item names and captions directly in the Expression portion of the window in proper MDX format:

[Measures].[Name(Caption)]

where Name is the unique identifier that you can see for the measure item displayed in the Measure items folder of the expression window and Caption is the text that identifies the measure item in the view (caption also shows next to the Name for the measure item in the Measure Items folder).

**MDX Functions Folder** – A Functions folder provides you with logical, member, numeric, set, Stratum.Viewer-specific, tuple, and VBA functions that can be used for building the filter expression. You can select a function by clicking, double clicking, or drag and drop. You can also key in a function directly in the Expression portion of the window.

If you select a function for your expression, then the formula for it will display in the Expression section and each parameter will be enclosed in double arrows (<< >>). Function parameters enclosed in brackets and double arrows, such as «PARAMETER», are required. Parameters enclosed in brackets and double arrows, such as [«PARAMETER»], are optional. You can highlight each parameter and type over it directly in the Expression section. Or you can click the needed element from the tree structure in the window and it will be inserted into that section of the function.

**Stratum.Viewer Functions Folder** – This folder includes custom Stratum.Viewer functions that serve as shortcuts for building commonly used calculations, such as cumulative and percent of total functions. If you use them in an expression, they will be preceded by a pound sign (#) to distinguish them from standard MDX functions. The Stratum.Viewer specific functions are:

- ABC Cumulative Percent of Total
- ABC Cumulative Total
- Achievement Percent
- Cumulative Percent of Total
- Cumulative Total
- Divide With Zero Check
- Percent of Change
- Percent of Subtotal
- Percent of Total
- Total

There are pop-up labels for all functions, and they give you a brief description of the functions.

2	<b>Expression</b> – Use this part of the window to build the expression for a filter on a level or an axis filter in the view. The MDX for objects selected from the View Items and Functions for Expression portion of the window display in this part of the window as you add them – add by clicking them or dragging and dropping them. You can also add objects to the expression by typing directly in the space provided in the Expression section of the window. Click the Examples link to see examples of expressions for different types of filters on levels or an axis in a view.
	<b>Note:</b> Objects not visible in a view or not part of a view definition can be used in an expression by manually entering them into the Expression portion of the window. You must refer to them by their valid MDX format and they must exist in the cube associated with the view.
3	<b>Filter Type</b> – When you access this window from a view to create a filter for a level, it will include a Filter Type button. Click it to access the Select Filter Method window if you need to apply a different type of filter to the level (Member List, User List, Named Set).
	<b>OK / Validate / Cancel</b> – Click the Validate button at any point while you are building the expression. Stratum.Viewer will verify that the format of your expression is valid. If you do not click the Validate button while building the expression, then validation will be performed once you click the OK button. Click OK to apply the expression filter.
	Help – Click to access examples of expressions for level or axis filters.

# **Filters Window**

There are three tabs in this window, used to filter any part of your view. Click to see descriptions of each tab.

- Levels Tab
- Data Tab
- Axis Tab

# Levels Tab

				Filters	×
Leve	ls	Data	Axis		
Ship-To R	legion:	50, 51		T	×
Product:	1	Filtered wit	th User List: Apple	s and Pears	×
UPC Glob	al Number:	No filter ex	rists	T	×
ABC Class	sification	A - A, B - I	3	T	×
Product C	Category:	No filter ex	rists	T	×
				2	2
				3 с	ancel
				n) in a view will display in the Levels tab of the Filters wind tails about any filtering applied to the level.	dow.
				the filter will be listed after the level name. Ship-To Regio ious image have member filters applied to them.	n and
				Itered with User List:" will display followed by the name of the previous image has a user list filtered applied to it.	f the
		med Set F named se		'Filtered with Named Set:" will display followed by the nan	ne of
		pression F pression.	<b>ilter</b> – The text	"Filtered with Expression:" will display followed by the	
	Thi	is text also		Il display next to levels that do not have a filter applied to es where a level is filtered but not yet drilled to in the view as accessed.	

	If a level's filter information has a series of dots "" at the end of it, click the dots to activate a cursor. This enables you to scroll right and see the rest of the filter details for the level. In this example, the dots for a filtered RepBroker level were clicked.							
	Janice Tierney, John Trainor, John Trasky, Mark Fiedler, Mary Lopez, Michelle K							
	A cursor displays so you can scroll right and see the names of the rest of the members in the RepBroker member filter.							
	Janice Tierney, John Trainor, John Trasky, Mark Fiedler, Mary Lopez, Michelle Kn							
2	<ul> <li>Each level has icons available for adding, changing, or clearing filters for the respective level.</li> <li>Change Filter T – Click this icon to add or change a filter. When you are setting up a new filter, the <u>Select Members window</u> will display. If you want to set up a different type of filter than a member filter, click the More button then choose Change Filter Type and select the filter type from the <u>Select Filter Method window</u> that displays. If you click the icon to change a filter, the window for the type of filter applied to the level will display. For example, if the level has a user list filter applied to it, the <u>Select User List Filter window</u> will display.</li> <li>Clear Filter X – Click this icon to remove a filter for a level.</li> </ul>							
3	<ul> <li>OK – Click OK to apply all the changes that you made in the Filters window. Changes made on any tabs will be applied to the view.</li> <li>Cancel – Click Cancel to close the window without applying your changes.</li> </ul>							

# Data Tab

			FILTERS		×
Lev	/els Data	Axis			
Sales Ar	mount Jan 2017 to Sep 201	r: <b>1</b>	Top Count 20	T	×
Sales Re	eturn Amount Jan 2017 to S	ep 2017:	No filter exists	T	×
Sales af	ter Returns:		No filter exists	T	×
				2	
			3		
			-	ОК С	Cancel
			ew will display in the Data tab of the Filters v by details about any filtering applied to the m		
	Top Count, Top	Percent, To	op Sum		
	Bottom Count,	Bottom Perc	cent, Bottom Sum		
	-		nt, Percent, Sum		
	Overall Top / B				
	• No filter exists to them.	– This text wi	Il display next to measure items that do not	have a filter a	pplied
2	Each measure item has measure item.	icons availab	le for adding, changing, or clearing filters fo	r the respectiv	/e
			icon to add or change a filter. When you are window will display.	e setting up a	new
			on to remove a filter.		
3	<b>OK</b> – Click OK to apply a tabs will be applied to th		es that you made in the Filters window. Char	nges made or	n any
			ndow without applying your changes.		

# Axis Tab

	FILTERS X
Lev	vels Data Axis
	s type of filter to set up complex filters on an entire axis. For example, filter all data on rows by multiple re items or by both measure items and attribute relationships. Click <b>here</b> to see examples.
Rows:	Filtered with Expression: [Measures].[Data1 (Sales Amount Jan 2017 to Sep 2 <b>Y</b> X
Column	s: No filter exists T X
	ок Cancel
•	Set up filters on the rows or columns axis using the Axis tab.
	Use axis filters when you need to set up filters involving multiple measure items or both measure items and attribute relationships. For example, use an axis filter to return all rows that fit the criteria of two different measure items such as all rows where Sales Units are greater than 1,000 and Profit Margin is less than 20%.
	<ul> <li>Filtered with Expression – If a filter exists, the filter expression displays next to the Rows and Columns section of this tab.</li> </ul>
	• No filter exists – This text will display next to an axis is it does have a filter applied to them.
	If axis filter information has a series of dots "" at the end of it, click the dots to activate a cursor. This enables you to scroll right and see the rest of the filter details for the axis.
	Filtered with Expression: [Measures].[Data1 (Sales Amount Jan 2017 to Sep 2
2	<ul> <li>Each axis has icons available for adding, changing, or clearing filters for the respective axis.</li> <li>Change Filter T – Click this icon to add or change a filter. When you are setting up or editing a filter, the Expression window will display.</li> <li>Clear Filter X – Click this icon to remove a filter for an axis.</li> </ul>
3	<b>OK</b> – Click OK to apply all the changes that you made in the Filters window. Changes made on any tabs will be applied to the view.

Cancel – Click Cancel to close the window without applying your changes.

*Click here to see examples.* - Example expressions are available to review or even copy and paste into your expression definition.

# **Grid Pop-up Menus**

Г

Right-click objects in views to display available functionality for them such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes. Options on pop-up menus vary by user. Your user profile level determines which options are available to you. The menus in these examples are for a user with an advanced level of access. Menus are displayed in alphabetical order.

### Attribute Relationships Pop-up Menu

Right-click an attribute relationship to display actions that you can take related to that object or axis.

	Сору		
	Paste		
	Select All		
2	Add 🕨		
	Edit 🕨		
	Hide	3	
4	Sort 🕨		
	Actions		
	Transpose	5	
_			
6	View Explorer		
	Properties		
		_	
4	Copy - This option	allows	you to copy sections of a view that you have selected.
•	Paste - Allows you enabled views.	to past	e data into update enabled cells. This option only shows in planning
	Select All - Use thi	is optior	n to select the entire grid.
2		e Items	options for adding Attribute Relationships, Regular Measure Items, , and Charts. Windows for adding the selected type of item will display once om this sub menu.
	Add	A	ttribute Relationships
			egular Measure Item
		- c	alculated Measure Item
		C	hart
	Edit - Edit the attrik	oute rela	ationships or edit hierarchies on the rows, columns, or view filter.

	Edit Attribute Relationships Rows Columns View Filter
3	<b>Hide</b> - When an attribute relationship is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the attribute relationship changes to No. From view explorer, you can drag an attribute relationship back in the grid if needed, or you can change the Visible property to Yes.
4	Sort - Sort options are Ascending, Descending, Remove, and Remove All.
5	Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.          Actions       Add Action         Add View To Existing Action       Display Actions That Include This View         Transpose - Use this option to change the axis for levels and measure items in the grid. Objects
6	displayed in columns are switched to display in rows and vice versa.          View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.         Properties - Click to maintain the attribute relationship properties including sorting and whether it is visible or not.

### Axis Pop-up Menu

Right-click the Rows or Columns headings in the Navigation Panel (or their filter icon if an axis is filtered) to display a menu with options to edit properties of that axis including its filter, totals, or All Others properties. A shortcut to adding hierarchies to the Rows or Columns of a view is to click the Add icon + in those sections of the Navigation Panel.



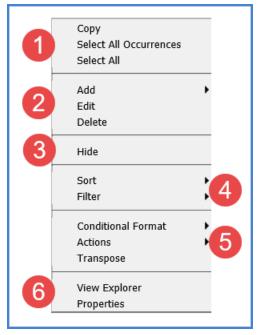
#### **General Pop-up Menu**

Right-click within the grid to display actions that you can take such as transposing the rows, columns, and measure items.

1	Copy Paste
2	Add Fait Faither Faith
3	Actions Franspose
4	/iew Explorer
1	<b>Copy</b> - This option allows you to copy sections of a view that you have selected. <b>Paste -</b> Allows you to paste data into update enabled cells. This option only shows in planning enabled views. <b>Select All</b> - Use this option to select the entire grid.
2	Add - The sub menu has options for adding Regular Measure Items, Calculated Measure Items, and Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.
	Add  Regular Measure Item Calculated Measure Item
	Edit - Edit the hierarchies on the rows, columns, or view filter.
	Edit Rows Columns View Filter
3	Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.
	Actions Add Action Add View To Existing Action Display Actions That Include This View
	<b>Transpose</b> - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.
4	<b>View Explorer -</b> This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.

## Measure Item Pop-up Menus (Detail and Grand Total Menus)

Measure items can be assigned to one axis, either rows or columns. Right-click the caption of a measure item in a detail row or column to display actions that you can take related to that object, such as inserting additional measure items or applying conditional formats.



Or, right-click the caption of a measure item in a Grand Total row or column to work with values in that area of a view, such as by applying sorts and filters to them.

Descriptions follow of the menus for measure items in detail and Grand Total rows or columns.

1	<b>Copy</b> - This option allows you to copy sections of a view that you have selected.						
•	<b>Paste -</b> Allows you to paste data into update enabled enabled views. This option does not display on the m						
	<b>Select All Occurrences</b> - Use this option to select data for all occurrences of that measure item in the active page of the View. This option does not display on the menu for Grand Totals.						
	Select All - Use this option to select the entire grid.						
2	Add - The sub menu has options for adding Regular Measure Items, Calculated Measure Items, a Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.						
	Add   Regular Measure Item Calculated Measure Item						
	Chart						
	<b>Edit</b> - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens an Edit window where you can edit the calculation, caption, ar format for the calculated measure item.						
		<b>Note:</b> You also can access editing windows for measure items from the Measure Items window, which is accessible from view toolbars, or by double-clicking the caption of the respective measure item in the view grid.					
	<b>Delete</b> - Deletes the measure item from the view defined is play in the view explorer.	nition without confirmation. It will no longer					

3	<b>Hide</b> - When a measure item is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the measure item changes to No. From view explorer, you can drag a measure item back in the grid if needed, or you can change the Visible property to Yes.
4	Sort - Sort options are Ascending, Descending, Clear, and Clear All.
	Filter     Edit       Clear       Clear All
5	Conditional Format – Use this option to edit or add conditional formatting on the measure item. There are also options for clearing the conditional format on the active measure item or all measure items. <u>Conditional Format</u> <u>Edit</u> <u>Clear</u> <u>Transpose</u> <u>Clear All</u> Actions – Use this option to add new actions, add the active view to existing actions, or display the
	Actions that include the active view.  Actions Add Action Add View To Existing Action Display Actions That Include This View  Transpose - Use this option to change the axis for levels and measure items in the grid. Objects
	displayed in columns are switched to display in rows and vice versa.
6	<b>View Explorer</b> - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.
	<b>Properties -</b> Click to maintain the measure item properties including the name, caption expression, type, pop-up labels, hyperlinks, and so forth.

## View Filter Pop-up Menu

Right-click the View Filter heading to display actions that you can take related to that object or section of the grid, such as filtering levels in that section.





**Edit** - Edit the hierarchies in the view filter. A shortcut to adding hierarchies to the View Filter is to click the Add icon + that's provided in the View Filter section of the view.

## Levels Pop-up Menu

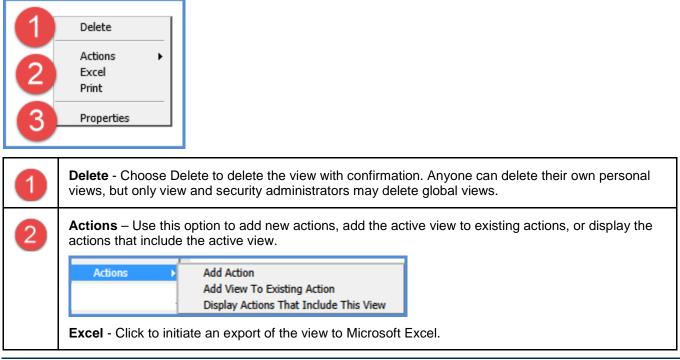
Right-click the level to display actions that you can take related to the level, such as editing the hierarchy.

1 2 4	Copy Paste Select All Add Edit Hide Sort Filter Actions Transpose View Explorer Properties	
1	Paste - Allows you to penabled views.	ows you to copy sections of a view that you have selected. Daste data into update enabled cells. This option only shows in planning option to select the entire grid.
2	Calculated Measure Ite you make your selection	as options for adding Attribute Relationships, Regular Measure Items, ems, and Charts. Windows for adding the selected type of item will display once on from this sub menu. Attribute Relationships Regular Measure Item Calculated Measure Item Chart relationships or edit hierarchies on the rows, columns, or view filter. Attribute Relationships Rows Columns View Filter
3	The Visible property fo	right-clicked and Hide is selected, the selected object is hidden from the grid. r the level changes to No. From view explorer, you can drag a level back in the can change the Visible property to Yes.
4	Sort - Sort options are	Ascending, Descending, Clear, and Clear All.

	Sort       Ascending Descending Clear         Clear All         Filter - Filter options are Edit, Change Filter Type, Clear, and Clear All. Change Filter Type opens a window where you can select the type of filter to set up or change. By default, a new filter you create from the Filter > Edit option is a list of members from the level with which you are working.
	Filter     Edit       Clear       Clear All
5	Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.  Actions Add Action Add View To Existing Action Display Actions That Include This View
	<b>Transpose</b> - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
6	<ul> <li>View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.</li> <li>Properties - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text.</li> </ul>

### View Name Pop-up Menu

Right-click the view name to display actions that you can take related to the overall grid, such as exporting to Excel.



**Print** - Click to print the active page of the view.



**Properties** - Click to maintain the view properties including the name, description, type and view group.

## **Measure Item Filter Window**

	MEASURE ITEM FILTER: AC	TUAL SALES SALES UNITS	×	
	Operator = <>	Value 2		
	< <=	Cancel		
	>			
	>=			
	Top Count Top Percent Top Sum Bottom Count Bottom Percent Bottom Sum Recursive Top Count Recursive Top Percent Recursive Bottom Count Recursive Bottom Percent Recursive Bottom Sum Overall Top Count Overall Top Percent Overall Top Sum Overall Bottom Count Overall Bottom Percent Overall Bottom Percent Overall Bottom Sum			
1	<b>Operator list</b> - Choose what typ recursive top / bottom, or overal	be of filter to apply, such as greater than I top / bottom filters.	or less than, top / bot	tom,

Value list - Type in the numeric value by which to filter the measure.

# **Navigation Panel**

	🕋 🔹 🖈 Growth by Customer Ship-To													
	□ 🖸 🕅 🚔 😭 🚺 🔄 🤉 🔯 🝸 🛂 🕜 🛛 🖂 🖂 🖓 🖂 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅 𝔅													
Rows:	Rows: :: Customer Ship-To: All × > :: Product Category × :: Product Family × :: Product Group × :: Product ABC Class × :: Produ													
Columns:	Region: Filtere	<u>d</u> × > 🗄	Distribut	ion Center \	Warehou	se: All ×	+							J
View Filter:	+						2			-	3		4-	
	T <u>Region</u>	<u>331</u>												
	ong Description n Center Warehouse	West 19					21					331 Total Actual		Actual
<u>Cust</u>	<u>tomer Ship-To</u>	Actual Sales Sales Amount Wk 1 2017 to Wk 37 2017	% of Total	Actual Sales Sales Amount Wk 1 2016 to Wk 37 2016	% of Total	Percent of Total Growth	Actual Sales Sales Amount Wk 1 2017 to Wk 37 2017	% of Total	Actual Sales Sales Amount Wk 1 2016 to Wk 37 2016	% of Total	Percent of Total Growth	Sales Sales Amount Wk 1 2017 to Wk 37 2017	% of Total	Sales Sales Amount Wk 1 2016 to Wk 37 2016
Southwest Fo	ods Phoenix AZ	\$3,428,556	9.30%	\$3,103,853	9.25%	<b>1</b> .042%	\$2,866,194	7.82%	\$2,630,713	7.87%	<b>-</b> .051%	\$6,294,751	8.56%	\$5,734,566
	est Oak Lawn I	\$2,453,392		\$2,204,833		_	\$3,469,395		\$3,284,193				8.05%	\$5,489,025
	Pittsburgh PA	\$3,051,312 \$2,659,921		\$2,943,426 \$2,442,095		-	\$2,512,289 \$2,610,861		\$2,410,786		<ul> <li>358%</li> <li>.060%</li> </ul>		7.57%	\$5,354,212
	oods Phoenix AZ WOB Philadelphia PA	\$2,659,921 \$2,533,431		\$2,442,095 \$2,320,495		-	\$2,610,861 \$2,565,041		\$2,403,957 \$2.299.139	6.88%	<ul> <li>069%</li> <li>120%</li> </ul>		7.17% 6.93%	\$4,846,052 \$4,619,634
		ed levels	s have	e the wo	ord "Fi II × >	Itered" I Prod	after the	em. ory × Varehou	IOT SHOW	-		avigation		
	If an axis is fil Rows: Columns:	:: <u>c</u>	Custom	icon will <u>her Ship-</u> : <u>All</u> ×	To: Al	×>	Produ	ct Cat	egory	).				
2	Add Levels – Click the Add Levels icon + for rows or columns to add levels to either section.													
	Rows: Columns:			red × >						+				
	View Filter:	+						<u>.</u>		_		s To Colum	_	
	Delete Levels	s – Click	the [	Delete L	evel i	con × r	next to a	iny lev	vel to de	lete th	nat leve	el from t	he vie	W.
	Rows: Columns:			hip-To: All			_			Family	<b>_</b>	Product Gro	oup ×	II Product

3	Drag and Drop Levels – You can move levels around in the view, changing whether they show on rows, columns, or the View Filter and changing what order levels display in on rows or columns. Click or tap the provided icon :: next to the level and then move the level to where you want it to show in the view.
	Columns: II <u>Region: Filtered</u> × > II Distribution Center Warehouse Use Drag / Drop To Move This Level To A New Location In The View
4	Scroll To See More Info – Scrolling arrows are provided when there isn't enough space available in
	the browser to show all the levels that exist in a part of the Navigation Panel. You can scroll back or ahead to the rest of the information displayed in the panel.

# **Paste Members Window**

	PASTE MEMBERS	3	×
Invalid Members: 1 of 10	Duplicate Members: 1 of 10		Valid Members: 8 of 10
Paste a list and click 'Validate'			
0 - 2400 - 12450 - 4	UPC Global Number	UPC Short Description	UPC Long Description
	0 - 24000 - 12543 - 4 0 - 24000 - 12553 - 4 0 - 24000 - 12516 - 4 0 - 24000 - 12593 - 4 0 - 24000 - 12416 - 4 0 - 24000 - 12443 - 4 0 - 24000 - 12476 - 4 0 - 24000 - 12576 - 4 24000 - 12576 - 4	Peach Slcs HS 106oz PL* Grapefruit SctnUnS 12oz B Lingonberries LS 12oz BR* Grapefruit SctnSw 12oz BR Lingonberries LS 106oz BR Peach Slcs HS 12oz PL* Pnappl Crsh 106oz BR* Pnappl Crsh 12oz BR*	Lingonberries LS 12 oz B Grapefruit Sctn Sw 12oz Lingonberries LS 106 oz Peach Slcs HS 12oz PL* Pnappl Crsh 106oz BR*
	<		>
4			
Validate		ок	Cancel Help

1	<b>Paste Members</b> – Use in combination with the Validate button to copy a list of members, validate the list, and then add valid members to the member list you are creating. Members copied into this section need to be separated by a carriage return. Examples of sources from which you can copy members would be a column in an Excel spreadsheet or list of members from a Stratum.Viewer view. You can also use a comma-delimited list from an email or text file.				
2	Validated Members - This section is display-only. It is populated with valid members that were entered in the left portion of the window.				
3	<b>Member Status</b> - Counts of invalid, duplicate, valid, and total members validated while using this window display at the top of the window.				
4	<b>Validate</b> - Click to verify the pasted members are valid for the level with which you are working. Valid members are moved to the right side of the window. Invalid members remain in the left side of the window. Duplicate members are removed. Counts are updated in the member status displayed at the top of the window.				
	<b>OK</b> - Click to return all valid members back to the Advanced Select Members window. In that window, you can make adjustments such as sorting or removing some of the members from the member list with which you are working.				

Г

# **Properties Window for Attribute Relationships**

П			
	Properti	es - UPC Li	ist Catalog Number ×
		Name:	UPC List Catalog Number
	Caption E	xpression:	Catalog Number
		Sort:	None
		Visible:	Yes
		Name –	The name of the attribute. Used in the view explorer and filter windows.
	•	attribute	<b>Expression</b> – A read only field that shows the expression behind the caption for an relationship. The resolved text generated by the expression creates the caption, which is the displays for the attribute relationship in the view. The Caption Expression window can be
			d for editing the expression by clicking the Browse button next to the field. Attribute ships will be referred to by their names in all other Stratum.Viewer locations that they appear.

relationships will be referred to by their names in all other Stratum.Viewer locations that they appear, such as in view explorer and the Select Members window.

Sort - Use to add, edit, or remove Ascending and Descending sorts.

**Visible** – Set this property to No to hide the attribute relationship in a view. Set this property to Yes

to display the attribute relationship in a view.

## **Properties Window for Columns**

2

	Properties - Columns				
	Drilldown View:	Yes 🔻 Actual Sales 1 n Performance 🛛			
(2	Repeating Values:	No 🔻			
	Totals Default:	Yes 🔹			
	All Others Default				
	Relationship Filter:	Yes 🔻			
	4 Empty Filter:	Yes 🔻			
	Axis Filter:	<u> </u>			

1	<b>Drilldown View</b> – 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 Yes and then use the Select View window that displays to choose a view.
2	<b>Repeating Values</b> – 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.
	Note: This property also can be edited from the Display Options window 🖳 in a view.
3	<b>Totals Default</b> – 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 control the totals settings for individual levels using the "Total" setting in a level's Properties window.			
	All Others Default – Use to control whether or not All Others values display by default for new levels inserted on columns. Leave the property set to No if you do not want All Others values to display by default. Change to Yes if you want all new levels that are inserted on columns to have All Others values display. All Others values represent the sum of all members not in a filter. You can control the All Others settings for individual levels using the "All Others" setting in a level's properties window.			
	<b>Note:</b> You also can enable or disable these properties for all levels on rows using the Display Options window in a view.			
4	<b>Relationship Filter and Empty Filter</b> – 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:			
	<ul> <li>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.</li> </ul>			
	Click the "X" button to remove a filter.			

# **Properties Window for Individual Measure Items**

## Regular Measure Items

Properties - Actua	Sales Sales Amount Wk 1 2017 to Wk 37 2017 X	
Name:	Data1	
Caption Expression:	[Measure] [From Period Short Desc] [From Year YYYY]	
Туре:	Regular	
Measure:	Actual Sales Amount	
3 Format String:	As Is 🔻	
Value:	Yes	
Image:	No v	
Conditional Format:	Yes ▼ Sales less than 100K	
Pop-up Expression:	Yes ▼ "Red indicator represents when sales are belov	
Hyperlink:	No ▼	
6 Visible:	Yes 🔻	
Filter:	Recursive Top Count 🔻 15	
Sort:	Descending	
8 Total:	Total 🔻	
measure items are name. Yo spaces ir <b>Caption</b> item. The displays The Capt	he text in this field determines the unique name that Stratum.Viewer will use to identify tem in the view. You can edit this field as needed. Default names given to new measur DataN. The "N" is a sequential number assigned by Stratum.Viewer to create a unique a will be prompted to make corrections to the name if you enter a duplicate name, use the name, use too many characters (more than 50), or use invalid characters. <b>Expression</b> - A read only field that shows the expression behind the caption for a measure resolved text generated by the expression creates the caption, which is the text that or the measure item in the view and other areas of the application such as view explore on Expression window can be accessed for editing the expression by clicking the Brow at to the field.	e any ure r.
calculate regular m	<b>Type</b> – This property shows the type of measure item you are working with – either regular, calculated, or distinct calculated. The property will be set to "Regular" if you are inserting or editing regular measure item.	
Note: Se	the next table for information about calculated and distinct calculated types.	
	<b>Measure</b> – This field is a read only field that displays the underlying measure you selected when setting up the regular measure item.	
f U	or measure items with time ranges, clicking the Browse button next to the Measure and opens the Edit Measure Item window. Use that window to edit the measure item's aderlying measure or time range. The main Time Range property for a view must be se as for the Properties window to behave in this manner.	

	• For measure items without time ranges, clicking the search button Q next to the Measure field opens the Select Measure window for editing the underlying measure. The main Time Range property for a view must be set to No for the Properties window to behave in this manner.
3	<b>Format String</b> – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting.
4	<b>Value</b> – Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item.
	<b>Image</b> – This property is used when setting up calculated measure items that display images. See the next table for information about this property.
5	<b>Conditional Format</b> – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. The Browse button $\overline{ \cdots}$ is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create a new one. The name of the selected conditional format displays in the text box left of the $\overline{ \cdots}$ icon.
	<b>Pop-up Expression</b> – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse
	button $\boxed{\dots}$ is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or create a new one. The active pop-up expression displays in the text box left of the $\boxed{\dots}$ icon.
	<b>Hyperlink</b> – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse button is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the is icon.
6	<b>Visible</b> – Set this property to No to hide the measure item in the view. Set this property to Yes to display the measure item in the view.
7	<b>Filter and Sort</b> – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied.
	If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.
8	<b>Total</b> – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total.
	None – No total will be displayed.
	• <b>Total</b> – This designation takes into account any underlying calculations for a measure item's definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value.
	• <b>Sum</b> – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any of the underlying calculations that Viewer performs to be used when

generating total values. You might choose to use a Sum total when a measure item calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.

#### Calculated and Distinct Calculated Measure Items

Prop	erties - Perce	nt of To	tal Growth		×				
	Name: Data7								
Captio	on Expression:	Percent	of Total Growth						
	Type:	Calcula	ited						
	Expression:	[Measu	res].[Data5 (% of Total)] - [Me	asures].[Data6 (					
3	Format String:	#,###	¢.000%		•				
	Value:	No							
	Image:	No			,4				
Condi	itional Format:	Yes V	Percent of Total Growth						
Pop-u	up Expression:	Yes 🔻	#MeasureItem("Value")		5				
	Hyperlink:	No 🔻							
	6 Visible:	Yes			•				
	Filter:		▼						
	Sort:	None			$\mathbf{V}$				
	8 Total:	Total			•				
					I				
1	measure it items are I name. You spaces in t <b>Caption E</b> item. The r displays fo	em in th DataN. will be he nan <b>xpress</b> esolve r the m on Expr	in this field determines the he view. You can edit this f The "N" is a sequential nur prompted to make correct ne, use too many character <b>ion</b> – A read only field that d text generated by the exp easure item in the view and ession window can be acce field	ield as needed. nber assigned b ions to the name is (more than 50 shows the exproression creates d other areas of	Default by Stratu e if you ), or us ression the cap the app	names Im.View enter a e invalic behind t btion, wh plication	given to i er to crea duplicate I characte he captio hich is the such as	new meas ate a uniqu name, us ers. on for a me e text that view explo	ure le e any easure orer.
2	<b>Type</b> – Thi calculated,	s prope or dist	erty shows the type of mea inct calculated. The proper or editing that type of meas	ty will be set to "					" if

**Note:** See the previous table for information about regular types.

**Expression** – When "Calculated" or "Distinct Calculated" is the measure item type, an Expression field shows in this window. It's a read only field that shows the expression for calculating the measure item. The Expression window can be accessed for editing the expression by clicking the Browse button  $\widehat{}$  next to the field.

Note that when you are using a calculated measure item to display images in a view that the expression will determine the location/name of the image file for Stratum.Viewer to display.

	<ul> <li>The image file must reside in the Stratum.Viewer application folders. It is recommended that all custom images reside in a subfolder of the Images folder of the Stratum.Viewer application.</li> </ul>
	• Supported file types for images are *.jpg, *.jpeg, *.png, *.bmp, *.gif, *.tif, and *.tiff.
	The image will display according to its original, default size.
3	<b>Format String</b> – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting.
4	<b>Value</b> – Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item.
	<b>Image</b> – This property is used when setting up calculated measure items that display images. You use the Expression window to define the location of the image and then set this property to Yes in order for the defined image to display in the grid. See item 2 above.
ß	Conditional Format – Controls the display of icons, and cell and text formatting for the measure
	item by applying the conditional format rules. The Browse button 🛄 is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create
	a new one. The name of the selected conditional format displays in the text box left of the $\square$ icon.
	<b>Pop-up Expression</b> – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse
	button 📟 is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or
	create a new one. The active pop-up expression displays in the text box left of the $\square$ icon.
	<b>Hyperlink</b> – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse
	button 🔤 is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the 🔤 icon.
6	<b>Visible</b> – Set this property to No to hide the measure item in the view. Set this property to Yes to display the measure item in the view.
7	<b>Filter and Sort</b> – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied.
	If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.
8	<b>Total</b> – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total.
	None – No total will be displayed.
	<ul> <li>Total – This designation takes into account any underlying calculations for a measure item's definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value.</li> </ul>
	<ul> <li>Sum – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any of the underlying calculations that Viewer performs to be used when</li> </ul>

generating total values. You might choose to use a Sum total when a measure item
calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.

# **Properties Window for Levels**

Properties - UPC Global Number X		
Name:	UPC Global Number	
Caption Expression:	UPC #	
2 Filter:	Members	
Sort:	None	•
Total:	Yes	
All Others:	Yes	
Visible:	Yes	•
Display Text:	Value	۲

1	Name – Name of the level. Used in the view explorer and filter windows. Caption Expression – A read only field that shows the expression behind the caption for a level. The resolved text generated by the expression creates the caption, which is the text that displays for the level in the view. The Caption Expression window can be accessed for editing the expression by clicking the Browse button end to the field. Levels will be referred to by their names in all other Stratum. Viewer locations that they appear, such as in view explorer and the Select Members window.
2	<ul> <li>Filter and Sort - Use to add, edit, or remove filters and sorts.</li> <li>Filter - click the Browse button to access the <u>Select Filter Method window</u> and either add or change a filter. If a filter already exists, the filter type displays in this field and a pop-up label shows filter criteria.</li> <li>Sort - use the list provided to add Ascending or Descending sorts or to change or remove a sort.</li> </ul>
3	<ul> <li>Total – Use to control whether or not Total values display for the level. When the property is Yes, totals will display for the level, When the property is No, totals will not display.</li> <li>All Others – Use to control whether or not All Others values display for the level. All Others values represent the sum of all members not in a filter. When the property is Yes, All Others values will display for the level, When the property is No, All Others will not display.</li> </ul>
4	<ul> <li>Visible – Set this property to No to hide the level in a view. Set this property to Yes to display the level in a view.</li> <li>Display Text – This property controls what displays in the first row or column for the level. The default is the level value. You can change it to any of the attribute relationships that have been made available in the view for the level.</li> </ul>

# **Properties Window for Rows**

	Prop	erties - Rows	×		
	Di	illdown View:	Yes V ASP Trends		
2	Repe	eating Values:	No T		
	Г	otals Default:	Yes		
	All C	)thers Default	No		
	Relat	ionship Filter:	Yes 🔻		
	4	Empty Filter:	Yes 🔻		
		Axis Filter:	5 <u> </u>		
(	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 Yes and then use the Select View window that displays to choose a view.				
2	<b>Repeating Values</b> – 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.				
		Note: This	property also can be edited from the Display Options window 🔍 in a view.		
6	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 control the totals settings for individual levels using the "Total" setting in a level's Properties window.				
		All Others Default – Use to control whether or not All Others values display by default for new levels inserted on rows. Leave the property set to No if you do not want All Others values to display by default. Change to Yes if you want all new levels that are inserted on rows to have All Others values display. All Others values represent the sum of all members not in a filter. You can control the All Others settings for individual levels using the "All Others" setting in a level's properties window.			
		Note: You a window	also can enable or disable these properties for all levels on rows using the Display Options in a view.		
4		that have da Relationship and without Empty Filter property mu	<b>ip Filter and Empty Filter</b> – When the Relationship Filter is set to Yes, only the members ata for the measures and time ranges defined in the view will display. When the p Filter is set to No, all members will be displayed. This allows you to see members with data for the measures and time ranges defined in the view. You can additionally use the property. In order for the Empty Filter property to be set to Yes, the Relationship Filter is be set to Yes. The empty filter will remove any rows where no data exists, but that were d by the relationship filter. This can occur when there is a level filter on the axis opposite e item axis.		
6		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.

### **Properties Window for View Filter**

There are no properties for this folder in view explorer. If there are levels in the View Filter, they will each have their own properties window. See <u>Properties Window for Levels</u>.

### **Select Filter Method Window**

Select Filter Method	:
None     Member List	
User List	
Named Set	
OK Cancel	

Only the Member List and Named Set options display when the window is accessed from the Expression window:

1

**Filter Methods** - Choose None then click OK if you are removing a filter. To apply or change a filter, select an option and click OK or use the quick filter option noted in item 2.

• **Member List** - clicking OK after selecting this option opens the <u>Select</u> or <u>Advanced Select</u> <u>Members window</u>. Search for and select members for the filter.

-									
	• User List - clicking OK after selecting this option opens the <u>Select User List Filter window</u> . Use								
	the search or filter Y tools as aids in finding a list. Optionally click Show Details A 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.								
	• <b>Named Set</b> - clicking OK after selecting this option opens the <u>Select Named Set Filter window</u> . Select a named set for the filter.								
	• <b>Expression</b> - clicking OK after selecting this option opens the Expression window. Set up an expression for the filter.								
2	<b>Quick Filter Field</b> – Perform a quick filter by selecting Member List, using this field to specify the level members, then clicking OK. Separate the values in the field by semicolons and do not use any spaces between the values and semicolons.								
	When using this method and working in a view, you need to refer to members based on the level's display text. For example, enter member values if the level display text is set to Value or enter member attribute relationships if the level display text is set to one of its attribute relationships. Here is a quick filter specified for three Ship-To Markets. The values entered in the field were Chicago;Dallas;Phoenix because the Ship-To Market display text is set to SMkt City:								
	SELECT FILTER METHOD X								
	O None								
	Member List								
	O User List								
	Named Set								
	O Expression								
	Chicago; Dallas; Phoe								
	OK Cancel								
	You will see the following message if you do not refer to members based on their display text setting, if you enter members not applicable to the level, or if you enter members that your role permissions do not permit you to see.								
	STRATUM.VIEWER X								
	Invalid search. Please revise your search criteria.								
	ОК								
	You can enter wildcard criteria in the Quick Filter field. In this example, the Member List option is								
	selected and Product Category has been quick filtered by a wildcard search of %Fruit%. Categories								
	with "Fruit" in their display text were returned by the filter.								

Image: Second secon						
Product Category	▼ Sales Amount Wk 1 2014 to Wk 38 2014	Sales Amount Wk 1 2013 to Wk 38 2013				
Canned Fruit	\$1,979,809,747					
Fresh Fruit	\$294,627,014	\$501,706,538				
Frozen Fruit Products All Others Grand Tota	SELECT FILTER	er List .ist d Set				

## **Select Members Window**

	Select Members: UPC Global Number	x
6 Selected d	× Q Search By: UPC A	BC Classification 🛛 Contains
UPC ABC Classification 🔺	UPC Long Description	UPC Commodity Code
□c	Asparagus	2450
□ c	Strawberries	4850
	Orange Juice Conc.	5230
🗆 c 🥑	Blueberry Filling 106oz PL*	5110
□ c	Grapefruit Sctn UnS 106oz BR*	5110
✓ c	Mand Org Pcs 106oz BR*	5110
□c	Blueberry Filling 106oz BR*	5110
⊻ c	Mand Org Pcs 12oz PL*	5110
□c	Blueberry Filling 12oz PL*	5110
□ c	Grapefruit Sctn UnS 12oz BR*	5110
⊻ c	Mand Org Pcs 12oz BR*	5110
□ c	Blueberry Filling 12oz BR*	5110
∠ c	Mand Org Pcs 106oz PL*	5110
⊠ c	Navel Oranges	3160
□ c	Pork Chops - Butterfly	3347
<u> </u>	Ground Round 90% Lean	3347
C	Sweet Onions, Chopped	9999
Clear All OK	Cancel More	Help

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.

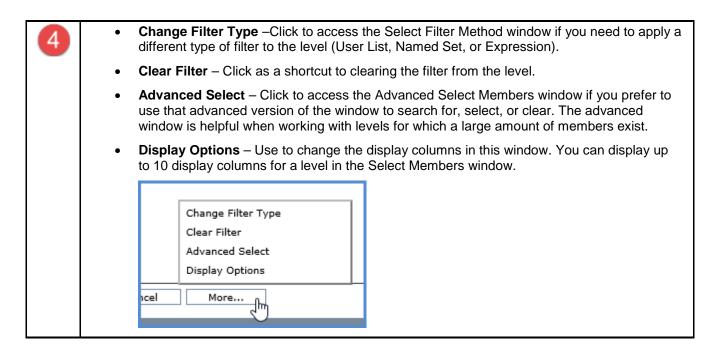
**Note:** The window is also used when selecting members from the expression window for calculated measure items and when administrators set up roles.

Click the search icon  $\mathsf{Q}$  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".

	SELECT MEMBERS: UPC GLOBAL NUMBER X								
	0 Selected b;c	× Q Search	By: UPC ABC Classification 🛛 Not Equal to 💙						
	UPC ABC Classification	UPC Long Description	UPC Commodity Code						
	□ %	%	%						
	□ ?	?	?						
	□ A	Frozen Lasagna Dinner	6580						
	□ A	Apple Filling 12oz PL*	5108						
	A	Applesauce 106oz BR*	5512						
		Applesauce 106oz PL*	5512						
		Blackberries 106oz BR*	5512						
		Pnappl Bites 106oz BR* Pnappl Bites 12oz PL*	5512						
		PRADDI BILES 1202 PL	3312						
2	<ul><li>expression, etc. Click the or deselect members. Click</li><li>Other options and tips:</li><li>If your search returns of</li></ul>	checkboxes next to members or k OK when you are done making	ers to include in a member list filter, click anywhere in member rows to select g various selections to apply your filter. vill display as selected. At that point, you hat member to a filter.						
	<ul> <li>window.</li> <li>Click the checkbox in t at once.</li> <li>Use Shift+Click as a sl</li> </ul>	he heading area to select or des	ted members to a filter and close the select all members on all pages in the list onsecutive members (click the first 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.								
	0 Selected b;c Q Search By: UPC ABC Classification V Not Equ								
	UPC Long Description	UPC ABC Classification	UPC Commodity Code						
	%	%	%						
	□ ?	?	?						
	Apple Filling 106oz PL*	А	5108						
	Apple Filling 12oz PL*	А	5108						
	Applesauce 106oz BR*	А	5512						
	Applesauce 106oz PL*	А	5512						
	Applesauce 12oz BR*	A	5512						
	Applesauce 12oz PL*	А	5512						
	Baby Carrots	Δ	3120						
		d links at the bottom of the list to s pages are retained as you mov	move between pages of members. ve between pages in the list.						
		display lists (views, user lists, ef that controls the page size.	tc.), there is a single administrative setting						
3	<b>Clear All</b> – Click this butto so you can make new sele		from a filter. The window remains open						
	More Click the More b	outton for additional features:							



## Select Named Set Filter Window

	Select Named Set Filter: Months	×
Named Set: January February March April May June July August September	Act Sales YTD Months         AP - Open YTD Months         AP - Paid YTD Months         AR - Collected YTD Months         Budget YTD Months         Budget YTD Months         Budget YTD Months         Budget YTD Months         Cart Activity YTD Months         Deductions Open YTD Months         Deductions Open YTD Months         Inventory YTD Months         Open Mfg Orders YTD Months         Open Orders YTD Months         Open Orders YTD Months         Open Purch Ordr YTD Months         POS Data YTD Months	
Filter Type	OK Cancel	]

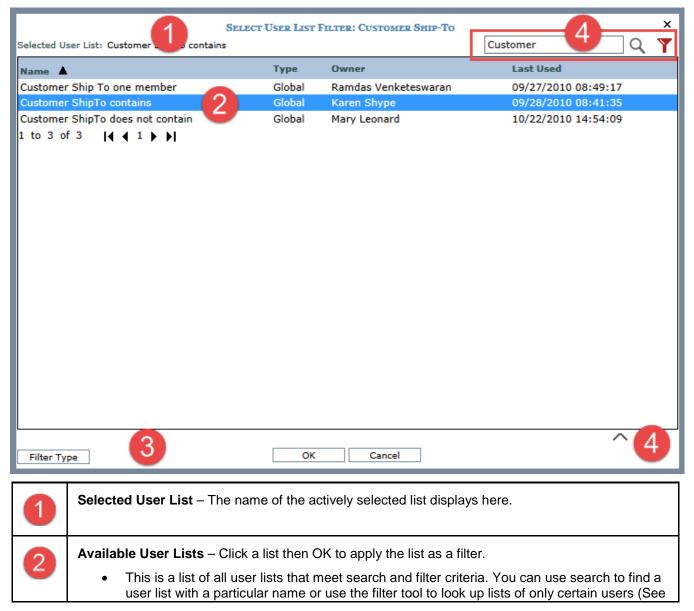
**Named Set** – Select a named set from this list to filter a level from a single-level time hierarchy by its YTD periods. Choose a type applicable to the measure items in your view. For example, an Actual Sales named set if there are Actual Sales measure items in the view.

1

	<b>Note:</b> The list will be disabled and a "No named sets available" message will display in the window for levels that don't have named sets.
2	<b>Named Set Members</b> – The time members that make up the named set will display in this section after you select a named set from the above list.
3	<ul> <li>OK – Click OK to apply the named set selection made in this window and to close the window.</li> <li>Cancel – Click Cancel to close the window without applying your selection.</li> <li>Filter Type - When you access this window from a view to create a level filter, it will include this button. Click to access the Select Filter Method window if you need to apply a different type of filter to the level (Member List, User List, Expression)</li> </ul>

## Select User List Filter Window

#### Main Window Sections



	Search and Filter Features). You can use the Show Details section to look up list properties and members.
	<ul> <li>To sort the displayed lists, click the Name, Type, Owner, or Last Used column heading. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange columns in the section, click a column heading, drag it before or after another column heading, and drop it at the new location.</li> </ul>
	<ul> <li>At the bottom of this section (you may need to scroll down), this is a count of how many lists are displayed in the window. There are paging arrows to move between pages of lists. Arrows are active only when more lists exist than can be displayed in a single page of this section.</li> </ul>
	1 to 27 of 27   ◀ 1 ▶ ▶
3	<b>OK</b> – Click OK to apply the user list selection made in this window and to close the window.
	<b>Cancel</b> – Click Cancel to close the window without applying your selection.
	<b>Filter Type</b> - When you access this window from a view to create a level filter, it will include this button. Click to access the Select Filter Method window if you need to apply a different type of filter to the level (Member List, Named Set, and Expression).
4	See the next two sections for information about the search, filter, and detail lookup tools in this window.

#### Search and Filter Features

Optionally use the search and/or filter features (section marked '4' in following image) to look for particular user lists.

		SELECT US	SER LIST FILT	ER: CUSTOMER SOLD-TO		×
Selected User I	List: Customer :	Sold-To Canada				Q 7
Global	Personal	Owner			4	
1	<b>v</b>	Me (Karen Jones)				r i
		Adam Green				
		Alex Avery				
		Allen Pravan				
~	~	Carrie Jacobs				
		Chris Davis				
		Dale Madison				_
Name 🔺			Туре	Owner	Last Used	
Customer Sol	d-To Canada		Personal	Mary Lancaster	06/26/2014 23:18:02	
Customer Sol	d-To Chicago		Personal	Carrie Jacobs	03/28/2014 09:50:41	
Customer Sol	d-To Dallas		Global	Karen Jones	05/16/2014 14:33:45	

• Search – Enter all or part of the name(s) of the list(s) you are searching for and then click the Search button to execute the search. • Filter – Click the provided button T to use the filter feature. It acts as a toggle to show or hide the filter feature. Use the Global and Personal checkboxes to the left of a user's name to indicate whose lists you want to see (users with selected checkboxes will be included in filter results). The checkboxes next to the Global and Personal headings are toggles that select or deselect all Global or Personal lists of all users at one time (for example, if the Personal heading checkbox is selected, all Personal lists of all users will display in the window). At the bottom of the filter section (you may need to scroll down), there is a count of users. There are paging arrows to move between pages of users. Arrows are active only when more users exist than can be displayed in a single page of this section.

**Note**: The filter toggle will be red **Y** if a filter has been applied. If you are using the filter section and then access the details section of the window, the filter section will close automatically.

#### Show Details Feature

Optionally use this section to view details about the list that is actively selected in the window. Select a list and then click the Show Details  $\land$  button. Click the Hide Details  $\checkmark$  button to hide the section. You can see the members in the list, the list description, count of members in the list, and the list mode (Static or Dynamic).

Description: Sold-To's in My Canadian Markets	Member Count: 4	Mode: Static 4
Customer Sold-To 🔺	SldTo Long Description	
150310	Maple Tree Foods	
150320	Quebec Foods	
150330	Canadian Imports	
150340	Alberta Foods	
1 to 4 of 4  ◀ ◀ 1 ▶ ▶		
0	Cancel	

 Information that displays for list members depends on whether you accessed the window from a view or the Role Maintenance window. If accessed from a view, the section displays attribute relationships available for the level in the view. If accessed from the Role Maintenance window, the section displays attribute relationships as defined by administrative settings in the Dimension window.

**Note:** Only members your role permits you to access will display. The section will be blank if your role doesn't permit you to access any of the list members.

- To sort detail information, click the heading for any column of information displayed for the members. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange columns in the section, click a column heading, drag it before or after another column heading, and drop it at the new location.
- At the bottom of the details section (you may need to scroll down), this is a count of how many members are in the list. There are paging arrows to move between pages of members. Arrows are active only when more members exist than can be displayed in a single page of this section.

**Note**: If you are using the details section and then access the filter section of the window, the details section will close automatically.

# **Advanced Concepts**

### Axis Filter Behavior When Levels are on Opposite Axis

Axis filters tend to be used in views where no levels exist on the axis opposite from the axis filter. That tendency is due to the basic nature of axis filters -- they take into account overall measure item totals for objects (level members) that are on the same axis as the axis filter. Also, the axis filter disregards any filtering impact that levels on the opposite axis have on the measure items and objects. The example that follows shows what to expect from an axis filter in a view with levels on the axis opposite the axis filter.

The following view has levels on rows and columns. Additionally there is a filter on the level in columns that returns one member of the Sales Director level.

III + View Name: <i>Axis Filters Example 1</i> ↓ →  View Filter							
• • • • • • • • • • • • • • • • • • •							
▼ Sales Dir >>	Steve Mentas	)					
<u>Ship-To Market</u> <u>City</u>	Sales Amount after Returns Q1 to Q3 14	Sales Units after Returns Q1 to Q3 14	ASP Q1 to Q3 14	Sales Amount after Returns Q1 to Q3 13	Sales Units after Returns Q1 to Q3 13	ASP Q1 to Q3 13	
Buffalo	\$114,641,854	2,234,182	\$51	\$196,876,407	3,143,917	\$62	
Calgary	\$57,381,046	1,315,652	\$44	\$98,721,363	1,868,353	\$53	
Chicago	\$76,373,335	1,524,738	\$50	\$130,499,511	2,101,447	\$62	
Dallas	\$164,838,778	3,258,055	\$51	\$284,071,921	4,601,809	\$61	
Phoenix	\$54,475,771	1,070,463	\$51	\$93,574,570	1,513,328	\$62	
Pittsburgh	\$31,274,349	629,490	\$50	\$51,927,462	847,681	\$61	
Quebec	\$172,659,668	3,290,846	\$53	\$301,599,661	4,750,837	\$63	
Raleigh-Durham	\$114,740,214	2,182,747	\$53	\$195,692,040	3,074,005	\$63	
Seattle	\$47,550,283	1,014,939	\$47	\$81,269,831	1,437,470	\$56	
St Louis	\$39,336,991	800,286	\$49	\$67,101,515	1,104,388	\$60	
St. John	\$79,861,356	1,629,895	\$49	\$133,880,862	2,249,995	\$59	
Winnipeg	\$133,698,869	2,611,061	\$51	\$232,572,343	3,734,308	\$62	
All Others							
Grand Total	\$1,086,832,514	21,562,356	\$51	\$1,867,787,486	30,427,538	\$61	

An axis filter is going to be applied to the row axis. The filter is meant to return members from the currently drilled to level, Ship-To Market City, that meet the following conditions:

- Sales Units after Returns Q1 to Q3 14 that are greater than 1,500,000
- ASP Q1 to Q3 14 that are greater than or equal to \$50

Here is the view after the axis filter has been applied. The Ship-To Market Cities that meet the axis filter conditions are Phoenix, Pittsburgh, Seattle, and Winnipeg. Keep in mind that the axis filter disregards the filter effect that the Sales Director member has on the measure items and rows. The axis filter considers the overall measure item totals for members of the Ship-To Market City level. If you were to hide the Sales Director level, you would see why these four cities were returned -- their overall measure item totals meet both of the measure item conditions that were specified in the axis filter (see the second image that follows).

EII + View Name: /	Axis Filters Example	1					
View Filter         [Measures].[Data17 (Sales Units after Returns Q1 to Q3 14)]>1500000 AND [Measures].[Data8 (ASP Q1 to Q3 14)]>50							
▼ Sales Dir >>	Steve Mentas						
<u>Ship-To Market</u> <u>City</u>	Sales Amount after Returns Q1 to Q3 14	Sales Units after Returns Q1 to Q3 14	ASP Q1 to Q3 14	Sales Amount after Returns Q1 to Q3 13	Sales Units after Returns Q1 to Q3 13	ASP Q1 to Q3 13	
Phoenix	\$54,475,771	1,070,463	\$51	\$93,574,570	1,513,328	\$62	
<u>Pittsburgh</u>	\$31,274,349	629,490	\$50	\$51,927,462	847,681	\$61	
Seattle	\$47,550,283	1,014,939	\$47	\$81,269,831	1,437,470	\$56	
Winnipeg	\$133,698,869	2,611,061	\$51	\$232,572,343	3,734,308	\$62	
All Others	\$819,833,241	16,236,402	\$51	\$1,408,443,280	22,894,751	\$61	
Grand Total	\$1,086,832,514	21,562,356	\$51	\$1,867,787,486	30,427,538	\$61	

Here is the view with Sales Director hidden. You can see that Phoenix, Pittsburgh, Seattle, and Winnipeg each have overall more than 1,500,000 sales units after returns for Q1 to Q3 of 2014 and each have overall average selling prices greater than or equal to \$50 for Q1 to Q3 of 2014.

III + View Name: Axis Filters Example 1 Y ↓ → View Filter									
Ship-To Market <u>City</u>	Sales Amount after Returns Q1 to Q3 14		es Units after Returns 21 to Q3 14	ASP Q1 to Q3 14	ŝ	Sales Amount after Returns Q1 to Q3 13	Sales Units after Returns Q1 to Q3 13	ASP Q1 to Q3 13	
Phoenix	\$213,980,453	$ \land$	4,236,117	\$51	1	\$368,792,840	5,962,322	\$62	
Pittsburgh	\$80,319,387		1,566,455	\$51		\$140,392,735	2,226,122	\$63	
Seattle	\$213,376,352		4,220,801	\$51		\$360,956,298	5,911,416	\$61	
Winnipeg	\$270,579,255		5,251,312	\$52	Ϊ	\$465,832,841	7,412,240	\$63	
All Others	\$2,696,027,091		60,247,090	\$45		\$4,629,177,345	85,234,653	\$54	
Grand Total	\$3,474,282,539		75,521,775	\$46		\$5,965,152,058	106,746,754	\$56	

## Comparison of Top / Bottom, Recursive, and Overall Filters

Measure item filters in Stratum.Viewer include sets of predefined Stratum filters – Top / Bottom, Recursive Top / Bottom, and Overall Top / Bottom. They can be applied as a Count, Sum, or Percent filter. They are meant to be used in views with multiple levels where you have drilled down through levels by header (which is done by clicking on level names). Examples in the next section illustrate how the different types of filters behave in views.

- Top and Bottom A filter that is applied only to the most detailed subtotal level displayed in a view. You
  will see the top or bottom performers at that subtotal level in relation to every member that's on display in
  every prior level.
- 2. **Recursive Top / Bottom** A filter that is applied to all subtotal levels displayed in a view and that takes into account the top or bottom performing members from all prior levels.
- 3. Overall Top / Bottom A filter that is applied at the most detailed level displayed in a view to give you the overall top performers based on all the levels displayed.

MEASURE ITEM FILTER: DAILY SALES AMOUNT X					
Operator	Value				
=					
<>					
<	Cancel				
<=					
>					
>=					
Top Count					
Top Percent					
Top Sum Bottom Count					
Bottom Percent					
Bottom Sum					
Recursive Top Count					
Recursive Top Percent					
Recursive Top Sum					
Recursive Bottom Count					
Recursive Bottom Percent					
Recursive Bottom Sum					
Overall Top Count					
Overall Top Percent					
Overall Top Sum Overall Bottom Count					
Overall Bottom Count					
Overall Bottom Percent					
YOverall Bottom Sum					

Predefined Stratum filters are intended to be used in views where multiple levels exist on the axis opposite of measure items. In the following examples, measure items are on columns so the filters will impact levels on rows.

We will drill down on levels by header in the following examples to illustrate the difference between various predefined Stratum filters. Drilling down by header is done by clicking the names of levels in these multi-level views.

# Example 1 – "Count" Filters

Here is a view with no filtering applied to its measure items and no other levels drilled to yet.

- 0 -	XI 🟫 🔍 I	0	8 <b>80</b> 91t	o 14 of 14
<b>III + View Name:</b> ↓→ View Filter	Top II Count Multiple Le	evels of Analysis		
Ship-To Market	SMkt Long Description	Daily Sales Amounts Wk 1 to Wk 30 2014	Daily Sales Units Wk 1 to Wk 30 2014	
<u>100</u>	Chicago	\$879,979	35,281	
112	Buffalo	\$1,088,461	45,023	
115	Dallas	\$811,920	31,419	
<u>123</u>	St Louis	\$1,366,502	55,631	
<u>153</u>	Phoenix	\$607,924	21,315	
<u>171</u>	Seattle	\$574,384	21,557	
<u>172</u>	Raleigh-Durham	\$875,126	35,274	
<u>185</u>	Philadelphia	\$678,110	26,203	
<u>187</u>	Pittsburgh	\$251,223	9,138	
207	Quebec QC	\$1,141,740	45,591	
229	Calgary AB	\$655,085	26,769	
249	Winnipeg MB	\$853,129	31,875	
296	St. John NB	\$291,324	11,763	
Grand Total		\$10,074,906	396,838	

The next image shows the view after drilling down by header to the Product Category level. All of the Product Categories for all Ship-To Markets are displayed.

See the next three images for illustrations of how the view results will vary depending on whether a Top, Recursive, or Overall Count filter was applied to the view.

		-		
⊣⊡ 🖻			<b>3002</b> 1 to 25	of 90
EEF + View Name:	Top II Count Multiple Le	evels of Analysis		
↓ → View Filter				
Ship-To Market	SMkt Long Description	Product Category	Daily Sales Amounts Wk 1 to Wk 30 2014	Daily Sales Units Wk 1 to Wk 30 2014
100	Chicago	Fresh Vegetables	\$176,459	7,817
		Canned Fruit	\$351,386	14,467
		Pork .	\$57,620	1,901
		Beef	\$23,096	1,063
		Fresh Fruit	\$136,662	6,612
		Frozen Fruit Products	\$6,471	181
		Frozen Prepared Dinners	\$128,284	3,240
112	Buffalo	Fresh Vegetables	\$140,859	6,023
		Canned Fruit	\$601,066	26,153
		Pork .	\$79,821	2,964
		Beef	\$37,514	1,389
		Fresh Fruit	\$109,279	5,196
		Frozen Fruit Products	\$11,274	334
		Frozen Prepared Dinners	\$108,647	2,962
115	Dallas	Fresh Vegetables	\$117,708	5,710
		Canned Fruit	\$292,976	11,012
			AA.C. 300	1.001

#### **Top Count Results**

Here's what the view looks like after applying a Top 3 Count filter to Daily Sales Units. Since Top Count filters are applied only to the most detailed subtotal level displayed in a view, only the top 3 Product Categories for **every** Ship-To Market are displayed.

- 6 🛓		0	3000 1 to 25	of 40 ( C C C C 1 to 2 of 2			
III + View Name: ↓→ View Filter	Top II Count Multiple Le	evels of Analysis	Top Count 3				
Ship-To Market	SMkt Long Description	Product Category	Daily Sales Amounts Wk 1 to Wt 30 2014	Toaily Sales Units			
100	Chicago	Canned Fruit	\$351,386	14,467			
		Fresh Vegetables	\$176,459	7,817			
		Fresh Fruit	\$136,662	6,612			
<u>112</u>	Buffalo	Canned Fruit	\$601,066	26,153			
		Fresh Vegetables	\$140,859	6,023			
		Fresh Fruit	\$109,279	5,196			
<u>115</u>	Dallas	Canned Fruit	\$292,976	11,012			
		Fresh Vegetables	\$117,708	5,710			
		Frozen Prepared Dinners	\$173,301	4,762			
<u>123</u>	St Louis	Canned Fruit	\$1,010,252	42,698			
		Fresh Vegetables	\$128,965	5,711			
		Fresh Fruit	\$58,664	2,466			
<u>153</u>	Phoenix	Canned Fruit	\$251,995	8,625			
		Fresh Vegetables	\$105,296	4,344			
		Fresh Fruit	\$60,009	3,135			
<u>171</u>	Seattle	Canned Fruit	\$224,771	7,631			
		Fresh Fruit	\$93,038	4,630			
		Fresh Vegetables	\$82,698	3,688			
<u>172</u>	Raleigh-Durham	Canned Fruit	\$476,031	19,693			
		Fresh Fruit	\$114,898	5,356			
		Fresh Vegetables	\$75,352	3,812			
<u>185</u>	Philadelphia	Canned Fruit	\$416,695	17,542			
		Fresh Vegetables	\$57,181	2,201			
		Fresh Fruit	\$49,388	2,095			
197	Pittshurah	Canned Fruit	\$77 387	2.281			

#### **Recursive Top Count Results**

Here's what the view looks like when you change the filter to a Recursive Top 3 Count. Since Recursive Count filters are applied to all subtotal levels displayed in a view, only the top 3 Product Categories from each of the top 3 Ship-To Markets are displayed.

- 6 🛓		0	2000 1 to 10 of 10 (000) 1 to 2 of 2				
Image: Top II Count Multiple Levels of Analysis ↓ → View Filter			Recursive Top Count 3				
Ship-To Market	SMkt Long Description	Product Category	Daily Sale Wk 1 to V	es Amounts Vk 30 2014	T Daily Sales Unit	s 4	
123	St Louis	Canned Fruit		\$1,010,252	42,69	8	
		Fresh Vegetables		\$128,965	5,71	1	
		Fresh Fruit	I	\$58,664	2,46	6	
207	Quebec QC	Canned Fruit		\$635,903	25,66	6	
		Fresh Vegetables	I	\$144,927	6,27	5	
		Fresh Fruit		\$99,829	5,65	5	
112	Buffalo	Canned Fruit	I	\$601,066	26,15	3	
		Fresh Vegetables		\$140,859	6,02	3	
		Fresh Fruit	/	\$109,279	5,19	6	
Grand Total				\$2,929,745	125,84	4	

#### **Overall Top Count Results**

Here's what the view looks like when you change the filter to an Overall Top 3 Count. Since Overall Top Count filters are applied to only the most detailed level displayed in the view, only the top 3 Ship-to Market/Product Category combinations in terms of overall sales units are displayed.

- 0 🛎	🗴 🔿 🚺	0	80091	to 4 of 4 🕻 🄇 🏷 🕽 1 to 2 of 2
<b>III + View Name:</b> ↓→ View Filter	Top II Count Multiple Le	evels of Analysis	Overall	Top Count 3
Ship-To Market	SMkt Long Description	Product Category	Daily Sales Amounts Wk 1 to Wk 30 2014	Daily Sales Units
123	St Louis	Canned Fruit	\$1,010,252	42,698
112	Buffalo	Canned Fruit	\$601,066	26,153
207	Quebec QC	Canned Fruit	\$635,903	25,666
Grand Total			\$2,247,221	94,517

## Example 2 – "Percent" Filters

Here is a view with no filtering applied to its measure items and no other levels drilled to yet.

		0	80091 to 3	23 of 23	1 to 6 of 6
+ View Name: Top N	Percent Multiple Le	vels of Analysis		100	
↓ → View Filter	Creene ribitipie Le	VCIS OF Analysis			
▼ ▼ <u>Year Based</u> >>	Current Year		Last Year		Grand Total
<u>Customer Parent</u>	Actual Sales Amount	Actual Sales Units	Actual Sales Amount	Actual Sales Units	Actual Sales Amount A
Wilder Foods	\$988,190,296	20,784,963	\$1,945,532,956	40,614,753	\$2,933,723,251
Sumpter Distribution	\$268,517,849	4,882,917	\$542,787,394	9,700,909	\$811,305,243
St Louis Dist Inc	\$32,516,509	539,063	\$69,144,235	1,098,868	\$101,660,744
Southwest Inc	\$44,557,893	723,721	\$90,696,698	1,453,994	\$135,254,591
Smith Inc	\$31,539,124	533,642	\$63,012,323	1,054,314	\$94,551,446
Quebec Foods	\$38,144,729	587,609	\$73,453,037	1,131,060	\$111,597,766
Prestwick Inc	\$64,239,197	1,112,737	\$132,850,579	2,253,739	\$197,089,776
Penn Brands	\$76,477,776	1,219,030	\$153,320,082	2,407,532	\$229,797,858
Packingham Corp	\$33,005,636	535,474	\$65,864,346	1,042,991	\$98,869,981
Pacific Corp	\$28,873,974	464,822	\$55,495,871	889,367	\$84,369,845
Oliveri	\$113,868,098	2,128,039	\$229,817,815	4,222,725	\$343,685,913
NY Foods	\$34,081,846	543,282	\$65,224,607	1,042,132	\$99,306,453
Montelissi	\$25,772,379	427,196	\$51,695,819	830,525	\$77,468,197
Midwest Providers	\$62,545,804	1,022,632	\$122,908,486	1,976,354	\$185,454,290
Maple Tree	\$28,714,464	476,372	\$56,066,296	900,162	\$84,780,760
Harrington's	\$432,533,742	6,738,617	\$849,596,667	13,102,262	\$1,282,130,409
Good Foods, Inc.	\$356,819,117	5,337,602	\$709,963,424	10,585,136	\$1,066,782,542
Dallas Food Service	\$31,312,694	518,351	\$62,533,410	1,026,362	\$93,846,104
Chicagos Finest	\$42,011,896	657,269	\$83,871,702	1,285,344	\$125,883,598
Canadian Imports Inc	\$34,835,640	569,798	\$67,498,896	1,095,843	\$102,334,536
Auburn Providers	\$26,644,294	435,214	\$54,442,984	882,992	\$81,087,278
Alberta Foods	\$31,714,545	515,296	\$63,950,442	1,029,967	\$95,664,988
Grand Total	\$2,826,917,501	50,753,647	\$5,609,728,068	99,627,330	\$8,436,645,569

The next image shows the view after drilling down by header to the Product Category level. All of the Product Categories for all Customer Parents are displayed.

See the next three images for illustrations of how the view results will vary depending on whether a Bottom, Recursive, or Overall Percent filter was applied to the view.

📑 💽 🚔 🕅 🚵 🚺 🕜 🕺 😂 🛇 🖓 🖓 🖓									
Image: Top II Percent Multiple Levels of Analysis         ↓ →         View Filter									
	▼ ▼ <u>Year</u> <u>Based</u> >>	Current Year		Last Year		Grand Total			
▼ <u>Customer</u> Parent	Product Category	Actual Sales Amount	Actual Sales Units	Actual Sales Amount	Actual Sales Units	Actual Sales Amount	Ac		
Wilder Foods	Fresh Vegetables	\$43,360,536	858,095	\$88,116,887	1,720,820	\$131,477,422			
	Canned Fruit	\$837,969,453	18,294,844	\$1,637,856,034	35,613,655	\$2,475,825,487			
	Pork	\$18,353,016	270,925	\$37,585,226	546,034	\$55,938,242			
	Beef	\$14,294,909	223,181	\$30,083,825	470,176	\$44,378,734			
	Fresh Fruit	\$30,549,965	615,023	\$61,542,687	1,227,553	\$92,092,652			
	Frozen Fruit Products	\$11,211,182	167,515	\$20,174,836	295,269	\$31,386,018			
	Frozen Prepared Dinners	\$32,451,236	355,379	\$70,173,460	741,247	\$102,624,696			
Sumpter Distribution	Fresh Vegetables	\$49,470,236	980,596	\$100,845,734	1,966,132	\$150,315,969			
	Canned Fruit	\$94,441,475	1,997,978	\$183,758,138	3,880,872	\$278,199,613			
	Pork	\$16,651,792	246,089	\$33,591,090	485,748	\$50,242,882			
	Beef	\$19,662,029	299,999	\$39,082,548	612,294	\$58,744,576			
	Fresh Fruit	\$39,025,185	772,591	\$77,686,820	1,520,121	\$116,712,005			
	Frozen Fruit Products	\$13,930,898	203,919	\$28,866,570	417,264	\$42,797,468			
	Frozen Prepared Dinners	\$35,336,235	381,743	\$78,956,494	818,477	\$114,292,730			
St Louis Dist Inc	Fresh Vegetables	\$6,291,713	135,100	\$13,264,067	281,084	\$19,555,780			
	Canned Fruit	\$7,920,866	113,929	\$14,965,889	215,057	\$22,886,755			
	Pork	\$2,410,875	35,698	\$4,947,371	72,095	\$7,358,246			
	Beef	\$3,456,106	54,712	\$6,186,792	95,583	\$9,642,897			
	Fresh Fruit	\$5,223,177	112,287	\$10,541,104	219,420	\$15,764,281			
	Frozen Fruit Products	\$2,635,239	38,886	\$5,085,008	74,818	\$7,720,247			
	Frozen Prepared Dinners	\$4,578,534	48,450	\$14,154,004	140,811	\$18,732,538			
Southwest Inc	Fresh Vegetables	\$7,236,723	148,119	\$14,120,725	280,834	\$21,357,448			
	Canned Fruit	\$24,765,482	374,546	\$48,622,971	734,442	\$73,388,453			
		61 472 724	21 220	60 T07 001	20.550	A / A / A ###			

#### **Bottom Percent Results**

Here's what the view looks like after applying a Bottom 10 Percent filter to Actual Sales Amount. The bottom 10% of Product Categories for **every** Customer Parent is displayed. The Bottom Percent filter was applied only to the most detailed subtotal level, Product Category.

🕞 🔄 🏙 🕅 🚵 🔯 👔 🕜 🛛 🕄 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓 🖓							
III + View Name: Top II Percent Multiple Levels of Analysis ↓ → View Filter							
	Based	om Percent 10		Last Year		Gri	
▼ <u>Customer</u> Parent	Product Category	ThActual Sales	Actual Sales Units	Actual Sales Amount	Actual Sales Units	Aci ¢	
Wilder Foods	Frozen Fruit Products	\$11,211,182	167,515	\$20,174,836	295,269		
	Beef	\$14,294,909	223,181	\$30,083,825	470,176		
	<u>Pork</u>	\$18,353,016	270,925	\$37,585,226	546,034		
	Fresh Fruit	\$30,549,965	615,023	\$61,542,687	1,227,553		
	Frozen Prepared Dinners	\$32,451,236	355,379	\$70,173,460	741,247	5	
Sumpter Distribution	Frozen Fruit Products	\$13,930,898	203,919	\$28,866,570	417,264		
	Pork	\$16,651,792	246,089	\$33,591,090	485,748		
St Louis Dist Inc	Pork	\$2,410,875	35,698	\$4,947,371	72,095		
	Frozen Fruit Products	\$2,635,239	38,886	\$5,085,008	74,818		
Southwest Inc	Frozen Fruit Products	\$953,501	13,993	\$2,281,223	32,925		
	Pork	\$1,473,736	21,228	\$2,787,021	39,550		
	<u>Beef</u>	\$1,742,478	28,444	\$4,396,268	69,043		
	Frozen Prepared Dinners	\$2,944,235	31,441	\$6,645,070	68,310		
Smith Inc	Frozen Fruit Products	\$467,880	7,063	\$1,948,643	27,970		
	Pork	\$2,326,782	34,706	\$5,996,366	87,630		
	<u>Beef</u>	\$2,850,093	47,229	\$5,964,097	99,425		
Quebec Foods	Frozen Fruit Products	\$1,382,423	20,350	\$3,477,189	50,644		
	<u>Beef</u>	\$2,175,293	33,293	\$4,313,989	63,496		
	Pork	\$3,164,429	45,320	\$5,100,858	72,573		
Prestwick Inc	Frozen Fruit Products	\$3,788,338	57,289	\$6,682,377	99,885		
	<u>Beef</u>	\$4,838,456	77,105	\$8,648,467	142,084		
Penn Brands	Frozen Fruit Products	\$3,839,591	58,530	\$7,207,944	109,341		
	Beef	\$4,919,569	76,379	\$9,252,252	142,432		
Packingham Corp	Frozen Fruit Products	\$1,740,793	24,683	\$3,579,342	51,005		

## **Recursive Bottom Percent Results**

Here's what the view looks like when you change the filter to a Recursive Bottom 10 Percent. The bottom 10% of Product Categories from each of the bottom 10% of Customer Parents is displayed. The Recursive Bottom Percent filter was applied to each level, Customer Parent and Product Category.

		9 6	00091	to 24 of 24 【	<b>1</b> to	6 of (
🖽 + View Name: <i>To</i>	op II Percent Multiple Lev	els of Analysis				
↓ → View Filter						
	Base Recursive	Bottom Percent 10		Last Year		Gra
▼ <u>Customer</u> <u>Parent</u>	Product Category	ThActual Sales	Actual Sales Units	Actual Sales Amount	Actual Sales Units	Act A
St Louis Dist Inc	Pork	\$2,410,875	35,698	\$4,947,371	72,095	
	Frozen Fruit Products	\$2,635,239	38,886	\$5,085,008	74,818	
Smith Inc	Frozen Fruit Products	\$467,880	7,063	\$1,948,643	27,970	
	Pork	\$2,326,782	34,706	\$5,996,366	87,630	
	Beef	\$2,850,093	47,229	\$5,964,097	99,425	
Packingham Corp	Frozen Fruit Products	\$1,740,793	24,683	\$3,579,342	51,005	
	Beef	\$1,754,651	26,344	\$3,726,302	55,011	
Pacific Corp	Frozen Fruit Products	\$880,915	13,573	\$421,994	6,328	
	Pork	\$955,101	13,878	\$1,717,374	24,935	
	Beef	\$2,283,039	30,983	\$4,765,971	69,182	
NY Foods	Pork	\$2,395,073	35,297	\$4,876,617	70,948	
	Frozen Fruit Products	\$2,509,613	36,462	\$4,656,899	67,895	
<u>Montelissi</u>	Frozen Fruit Products	\$902,365	14,222	\$1,875,821	29,250	
	Pork	\$1,416,669	21,400	\$3,238,271	47,230	
	Frozen Prepared Dinners	\$2,956,182	33,541	\$6,615,240	71,874	
Maple Tree	Frozen Fruit Products	\$1,889,081	27,738	\$4,083,118	59,173	
	Canned Fruit	\$2,115,213	31,537	\$4,052,995	60,376	
Dallas Food Service	Frozen Fruit Products	\$1,372,583	21,018	\$3,228,222	48,795	
	<u>Beef</u>	\$1,852,935	33,350	\$4,293,614	74,783	
Auburn Providers	Frozen Fruit Products	\$1,450,925	21,018	\$3,921,626	56,009	
	Pork	\$2,189,380	32,014	\$4,048,184	59,498	
Alberta Foods	Frozen Fruit Products	\$1,639,217	24,569	\$3,221,392	47,610	
	Pork	\$2,832,686	42,418	\$5,816,543	85,749	
Grand Tota		\$43,827,289	647,628	\$92,081,012	1,347,590	

#### **Overall Bottom Percent Results**

Here's what the view looks like when you change the filter to an Overall Bottom 10 Percent. Only the bottom 10% of Customer Parent/Product Category combinations in terms of overall sales amount is displayed.

	XI 🔬 🔍 II	0	80081	L to 25 of 85	00001	to 6 (	
+ View Name: Top II Percent Multiple Levels of Analysis							
↓ → View Filter			<u> </u>				
-	- (		1				
	Based Overall	Bottom Percent 10		Last Year		Gra	
▼ <u>Customer</u> <u>Parent</u>	Product Category	ThActual Sales ⊖mount	Actual Sales Units	Actual Sales Amount	Actual Sales Units	Aci /	
St Louis Dist Inc	Pork	\$2,410,875	35,698	\$4,947,371	72,095		
	Frozen Fruit Products	\$2,635,239	38,886	\$5,085,008	74,818		
	Beef	\$3,456,106	54,712	\$6,186,792	95,583		
	Frozen Prepared Dinners	\$4,578,534	48,450	\$14,154,004	140,811		
	Fresh Fruit	\$5,223,177	112,287	\$10,541,104	219,420		
	Fresh Vegetables	\$6,291,713	135,100	\$13,264,067	281,084		
Southwest Inc	Frozen Fruit Products	\$953,501	13,993	\$2,281,223	32,925		
	<u>Pork</u>	\$1,473,736	21,228	\$2,787,021	39,550		
	<u>Beef</u>	\$1,742,478	28,444	\$4,396,268	69,043		
	Frozen Prepared Dinners	\$2,944,235	31,441	\$6,645,070	68,310		
	Fresh Fruit	\$5,441,738	105,949	\$11,843,420	228,891		
Smith Inc	Frozen Fruit Products	\$467,880	7,063	\$1,948,643	27,970		
	<u>Pork</u>	\$2,326,782	34,706	\$5,996,366	87,630		
	<u>Beef</u>	\$2,850,093	47,229	\$5,964,097	99,425		
	Frozen Prepared Dinners	\$4,968,586	53,910	\$8,371,959	89,300		
	Canned Fruit	\$5,646,516	87,146	\$10,784,036	166,881		
	Fresh Fruit	\$6,319,050	130,022	\$13,142,999	262,344		
Quebec Foods	Frozen Fruit Products	\$1,382,423	20,350	\$3,477,189	50,644		
	<u>Beef</u>	\$2,175,293	33,293	\$4,313,989	63,496		
	<u>Pork</u>	\$3,164,429	45,320	\$5,100,858	72,573		
	Fresh Fruit	\$4,385,462	81,533	\$9,112,729	171,547		
	Fresh Vegetables	\$5,795,266	117,843	\$12,188,465	235,240		
Prestwick Inc	Frozen Fruit Products	\$3,788,338	57,289	\$6,682,377	99,885		
	Reef	\$4.838.456	77.105	\$8.648.467	142.084		

# Edit the Information Displayed in the Select and Advanced Select Members Windows

- 1. In either window, click More then choose Display Options.
- 2. Make the desired changes in the **Display Options window**:
  - Select or de-select display columns to change which ones display.
  - Select a value from the Return Members list to change how many members display per page in the search results section of the <u>Advanced Select Members window</u>.
- 3. Click OK.

# **Factors Influencing Default Settings in Filtering Windows**

The default state of the following windows depends on how you accessed the window, either from a view or from an administrative page such as Role Maintenance or User List Maintenance.

- Select User List Filter window
- Select Members, Advanced Select Members, and Paste Members windows

### Windows Accessed from Views or View Prompt Window

When filtering windows are opened from a view, the display columns that display by default are the values and/or attribute relationships showing in the grid. The Search By drop-down lists in the Select and Advanced Select Members windows depend on administrator settings in the Dimension window. If an attribute relationship was selected in those settings for the applicable level, then Search By will default to that attribute relationship. If System Defined was selected in those administrative settings for the level, then searches will default to the level's display text in the view.

The Buyer level in this view has three attribute relationships available for use in the view, and two of them are showing in the view. The Buyer Short Description is the display text, and the Buyer Phone Number also is on display. Those two attribute relationships are the default display columns in the filtering windows. The Buyer Short Description displays first and is the default selection for Search By. This is the default because the administrative Select Members Options settings for that level were set to System Defined and because that attribute relationship is the display text in the view.

III + View Nar ↓ → View Filt	me: <i>Buyer and Ship-To Sale</i> . er	s Etc. Figures				~	View Explo	rer	×
Buyer >>	Jane Burns							er and Ship-To Sales Etc. Figures Parameter Groups	^
Buyer Phone Number	384-102-4720						- A 🌆 (	Grid	
Ship-To Territory >>	<u>1100</u>				<u>1101</u>		-	▶ Columns ▶ ¹ Distribution Center Warehouse	
STerr Long Description	Southwest				South Cer	I		<ul> <li>12, Vendor Buyer</li> <li>12, Buyer</li> </ul>	
Customer SIC Code >>	Whisaler; Groc. Gen. Line	Whisaler; Groc/Rel., NEC	All Others	1100 Total	Whisaler; Groc.			Buyer     Buyer     Buyer Short Description	
SIC Long Description	Wholesaler; Groceries General	Wholesaler; Grocery/Related NE			Wholesaler; Groce			Buyer Fax Number	
Actual Sales Sales Amount Per1 2012 to Per45 2014	\$49,493,425	\$51,380,843		\$100,874,268				Buyer Phone Number     Ship-To Territory     L', Customer SIC Code	
Actual Sales Sales Return Units Per1 2012 to Per45 2014	(13,880)	(15,986)		(29,866)					
Actual Sales Sales Units Per1 2012 to Per45 2014	795,569	825,533		1,621,103			▶ Properties	Measure Items	×
Actual Sales Ext Actual Cost Per1 2012 to Per45 2014	\$20,137,634	\$21,909,932		\$42,047,567			Filter Sort Total	None None Yes	···
Actual Sales Ext Handling Cost	\$771,050	\$838,245		\$1,609,294	>	~	All Others Visible Display Text	Yes Yes Buyer Short Description	$\sim$

	Select Members: Buyer	x
0 Selected	Q Search By: Buyer Short Description Contains	$\sim$
Buyer Short Description ▲	Buyer Phone Number	
<u>□</u> %	%	
□ ?	?	
🗆 Jane Burns	384-102-4720	
🗌 Jerry Caplain	384-102-3928	
🗌 Kim Pritchett	384-102-4503	
🗌 Michael Sorritelli	384-102-0147	
1 to 6 of 6   <b>4 4</b> 1 <b>} }</b>		
Clear All	OK Cancel More Hel	P

When running views with parameters, a Display Text property for parameters can be used to customize what users see when they access filtering windows from the View Prompt window. When the property is set to View, the filtering window behaves the same as described in the prior section. When the property is set to an attribute of the level, the defaults in the filtering windows will use that attribute when windows are accessed from the View Prompt window.

**Note:** Display Text settings for a parameter only take effect if the Search By setting for a level in the Dimension window are set to System Defined. If an attribute relationship is selected for a level's Search By setting in that window, then Search By will default to that administrator-specified attribute relationship.

The following View includes a Select Members parameter on the UPC Global Number level. The parameter Display Text is set to UPC Long Description. Information displayed in the grid for the level are UPC Commodity Code, ABC Classification, and Short Description. The Search By setting in the Dimension window for the level is set to System Defined. When users access the Select and Advanced Select Members from the View Prompt window to make their UPC selections, the Search By and first display column will default to the UPC Long Description, according to the parameter Display Text setting.

II + View Name: <i>UPC Daily Sales by Ship-To Region</i> → View Filter						View Explorer		
		Ship-To Region >> SRgn Country	E. US USA		S. US USA		MidW US	UPC Daily Sales by Ship-To Region     Parameter Groups     ShipTo Region Parameters
▼ <u>UPC Global</u> <u>Number</u>	UPC ABC Classification	UPC Short Description	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 9 14	UPC Parameters     MemberParameter
<u>0 - 39484 - 92837 - 1</u> 0 - 24000 - 12430 - 4		Apples Red Delicious Applesauce 106oz BR*	\$9,574,364 \$6,421,048	6,905 1,546	\$13,700,369 \$5,651,066	10,271 2,346	\$10,848,5 \$6,560.6	
<u>0 - 24000 - 12430 - 4</u> <u>0 - 24000 - 12431 - 4</u>		Applesauce 10602 BR* Applesauce 1060z PL*	\$13,563,955	1,546	\$19,136,315	5,825	\$17,732,0	Presentation
<u>0 - 24000 - 12530 - 4</u> <u>0 - 24000 - 12531 - 4</u>		Applesauce 12oz BR* Applesauce 12oz PL*	\$6,062,108 \$18,921,470	1,478 8,768		676 3,887	\$7,927,1 \$27,569,8	
<u>0 - 02749 - 25408 - 6</u> 0 - 79453 - 02938 - 9		Asparagus Baby Carrots	\$20,400,226 \$7,456,195	2,871	\$19,747,022 \$7,923,022	5,475 2.177	\$25,778,1 \$8,523,1	
0 - 39484 - 24300 - 1	В	Bananas	\$2,613,118	1,674	\$3,187,710	1,273	\$3,500,8	Properties - MemberParameter
<u>) - 24000 - 12432 - 4</u> ) - 24000 - 12532 - 4		Blackberries 106oz BR* Blackberries 12oz BR*	\$2,753,608 \$3,267,656	311 975	\$2,990,502 \$1,266,028	395 373	\$4,144,4	Name MemberParameter Type Select Members
<u>) - 24000 - 12477 - 4</u> ) - 24000 - 12577 - 4		Blueberries 106oz BR* Blueberries 12oz BR*	\$1,304,435 \$2,089,920	126 293		288 86	\$1,715, \$2,777.	Prompt Choose UPC's to Review
) - 24000 - 12377 - 4 ) - 24000 - 12456 - 4		Blueberry Filling 106oz B	\$2,330,422	737	\$5,375,531	1,896		Default Value X
<u>0 - 24000 - 12450 - 4</u>	С	Blueberry Filling 106oz P			\$548,892	198		Display Text UPC Long Description

	Select Members: UPC Global N	IUMBER X
0 Selected	Q Search	By: UPC Long Description Contains V
UPC Long Description 🔺	UPC ABC Classification	UPC Short Description
<u> </u>	%	%
?	?	?
Apple Filling 106oz BR*	В	Apple Filling 106oz BR*
Apple Filling 106oz PL*	A	Apple Filling 106oz PL*
Apple Filling 12oz BR*	В	Apple Filling 12oz BR*
Apple Filling 12oz PL*	А	Apple Filling 12oz PL*
Apples Red Delicious	В	Apples Red Delicious
Applesauce 106oz BR*	А	Applesauce 106oz BR*
Applesauce 106oz PL*	A	Applesauce 106oz PL*
Applesauce 12oz BR*	A	Applesauce 12oz BR*
Applesauce 12oz PL*	А	Applesauce 12oz PL*
Asparagus	с	Asparagus
Baby Carrots	A	Baby Carrots
🗆 Bananas	В	Bananas
🗌 Blackberries 106oz BR*	А	Blackberries 106oz BR*
Blackberries 12oz BR*	А	Blackberries 12oz BR*
Blueberries 106oz BR*	В	Blueberries 106oz BR*
Clear All	OK Cancel More	Help

### Windows Accessed from Administrative Pages

The default display columns and Search By are determined by administrator settings when filtering windows are accessed from administrative pages. Administrators use a Dimension window to choose the defaults for each level.

Here is the Select Members window for the Buyer level shown in the first example. The window was accessed from the User List Maintenance window while setting up a user list. Based on administrator settings, the default Search By is value (Buyer) and the default display columns are value, Buyer Short Description, and Buyer Long Description.

	Select Me	MBERS: BUYER	×
0 Selected		Q Search By: Buyer	✓ Contains ✓
🔲 Buyer 🔺	Buyer Short Description	Buyer Long Description	
<b>□</b> %	%	%	
?	?	?	
🗆 ЈАВ	Jane Burns	Jane Burns	
	Jerry Caplain	Jerry Caplain	
🗆 КАР	Kim Pritchett	Kim Pritchett	
П мся	Michael Sorritelli	Michael Sorritelli	
1 to 6 of 6 🛛 🖣 🖣	1 🕨 🔰		
Clear All	OK Cancel	More	Help

# **Guidelines for Sorting and Filtering on Totals**

Here is some helpful information to know when sorting or filtering totals.

- Casual users can edit existing sorts and filters on totals.
- Advanced users and administrators can add new sorts and filters on totals and edit existing sorts and filters.
- This feature is available on the Grand Totals that are on the same axis as the measure items. For example, the measures items in this view are in columns. The Grand Totals in columns can have sorts and filters applied to them.

	□ I to 40 of 2055 COOO 11 to 16 of 16 Viewer ∨							
Image: How Name: R           ↓ →         View Filter	eturns by Lot, Reason C	Tode						
<u>Return Reason</u> <u>Code</u> >>	<u>624</u>		<u>625</u>			Gran	d Total	
RtnCd Long Description	Damaged Product		Price					
Lot	Current Yr YTD Months Return Amt	Previous Yr YTD Months Return Amt	Current Yr YTD Months Return Amt				t Yr YTD eturn Amt	Previous Yr YTD Months Return Amt
<u>19990101914001</u>	(\$475)	(\$448)	(\$289)		Copy Select		(\$3,431)	(\$3,237)
19990101914002	(\$459)	(\$433)	(\$280)		Select	All	(\$3,315)	(\$3,127)
<u>19990101914003</u>	(\$629)	(\$593)	(\$383)		Insert	•	(\$4,538)	(\$4,281)
<u>19990101914008</u>	(\$2,825)	(\$2,665)	(\$1,719)		Edit		(\$20,386)	(\$19,232)
<u>19990101914304</u>	(\$1,921)	(\$1,812)	(\$1,169)		Sort	•	(\$13,863)	(\$13,078)
<u>19990101914422</u>	(\$2,282)	(\$2,153)	(\$968)		Filter	,	Edit	(\$10,828)
<u>19990101914602</u>	(\$1,024)	(\$966)	(\$1,068)				Clear	उ (\$6,972)
19990101914603	(\$690)	(\$651)	(\$567)		Action	-		(\$4,695)
<u>19990101914604</u>	(\$238)	(\$224)	(\$101)		Trans	pose	Clear All	(\$1,128)
<u>19990101924003</u>	(\$5,279)	(\$4,980)	(\$2,640)		View I	Explorer	(\$31,298)	(\$29,527)
<u>19990101924015</u>	(\$1,046)	(\$987)	(\$637)		(\$601)		(\$7,548)	(\$7.121)
19990101924401	(\$6 154)	(\$5.806)	(\$4.653)		(\$4 390)		(\$44.415)	(\$41.901)

# **Named Sets**

Year to Date (YTD) named sets are created by Stratum.Connector for Viewer during the processing of the Analysis Services database for your Stratum.Viewer environment. There will be YTD named sets created for each single level, absolute time dimension. The named sets will consist of the time members for a year up to the current period -- for example, days in the year up to the current day, weeks up to the current week, months up to the current month, and quarters up to the current quarter.

This table shows examples of types of Stratum. Viewer dimensions that would and wouldn't have named sets.

Dimension	Hierarchy	Level(s)	Has a Named Set?
Weeks	Weeks	Weeks	Yes. This is an absolute time dimension with a single level.
Year Weeks	Year Weeks	<ul><li>Year</li><li>Weeks</li></ul>	No. This is an absolute time dimension, but it has multiple levels.
Year Based Weeks Based	Year Based Weeks Based	<ul><li>Year Based</li><li>Weeks Based</li></ul>	No. This is a based time dimension.
Product Brand	Product Brand	Product Brand	No. This is not a time dimension.

Named sets can be used in Stratum. Viewer for period based analysis and filtering levels from single level, absolute time dimensions. The named sets also can be used for setting up calculated measure items. More details:

- Named Sets Created for Single Level, Absolute Time Dimensions
- <u>Accessing Named Sets and Using them in Views</u>

### Named Sets Created for Single Level Time Dimensions

Here are examples of named sets and their members that are created by Stratum.Connector for Viewer for single level, absolute time dimensions. Factors that determine the named sets are measure groups and their related Stratum.Server Structure Codes, the Based Periodic ViewSets in ViewGroups associated with the Structure Codes (excluding Based Year ViewSets), Categories in the Structure Codes, and Current Period information in the Stratum.Server database. For each Category in a Structure Code, a Named Set for each type of Based Periodic ViewSet is created.

Structure Code	ViewGroup Associated with Structure Code	Based Periodic ViewSets in the ViewGroup
Sales	Sales	Year Based
		Quarters Based
		Months Based
		Weeks Based
Inventory	Inventory	Year Based
		Quarters Based

		Months Based
		Weeks Based
Forecast	Forecast	Year Based
		Quarters Based
		Months Based

Additionally, the Structure Codes contain these Categories.

Structure Code	Category
Sales	Sales
Inventory	Inventory
Forecast	Forecast

Given this set up, Stratum.Connector for Viewer will create the following named sets. Their names consist of the Category name, a space, the text "YTD" (for year to date), another space, and the name of the Absolute Periodic ViewSet on which the Based Periodic ViewSet in the ViewGroup was based.

Structure Code	Named Set
Sales	Sales YTD Quarters
	Sales YTD Months
	Sales YTD Weeks
Inventory	Inventory YTD Quarters
	Inventory YTD Months
	Inventory YTD Weeks
Forecast	Forecast YTD Quarters
	Forecast YTD Months

### More Information:

Named sets are comprised of members that make up the YTD Periods for the related Absolute Periodic ViewSet. Current Period information determines the member list for each named set. For example, if the current month in the Stratum.Server storage database is defined as April, the YTD Periods for the Months ViewSet would be January, February, March, and April. Given this, named sets such as Sales YTD Months and Forecast YTD Months would be comprised of the members January, February, March, and April.

Given the example named sets shown previously, if the Current Period was September 2014, then:

- The list of members for Sales YTD Quarters and other YTD Quarters named sets would be Q1, Q2, and Q3.
- The list of Members for Sales YTD Months and other YTD Months named sets would be January, February, March, April, May, June, July, August, and September.
- The list of Members for Sales YTD Weeks and other YTD Weeks named sets would be Week 1 through Week 38.

## Accessing Named Sets and Using Them in Views

Named sets are accessed from the Select Named Set Filter window, which in turn is accessed from the Select Filter Method window when you are working with filters or working with expressions. Examples of using named sets follow. Remember, to use named sets you must be working with a single level, absolute time dimension such as Weeks, Months, Quarters, or Periods. When you are choosing a named set for a filter or expression, be sure that the set is relevant to the measure items in the view or expression. For example, if the measure item in a view is Actual Sales and you are filtering a level by a named set, choose one that pertains to Actual Sales rather than one pertaining to Budget.

#### Named Set Used for a Filter

The following view includes the Months level, which is from the Months time hierarchy and time dimension. Because the Months dimension is a single level, absolute time dimension, you can use the named sets for the Months level when working with the view. The Budget YTD Months named set was used to filter the level because Budget measure items are in the view. More information follows this image.

III + View Name: Period Based Budget View ↓ → View Filter							
▼ ▼ <u>Year</u> >>	<u>2015</u>				<u>2014</u>		
Months	Budget Budget Amount Working	Budget Budget Amount Frozen	Budget Budget Units Working	Budget Budget Units Frozen	Budget Budget Amount Working	Budı Amo	
Ja Filtered V	Vith Named Set:	Budget YTD Mo	nths 2,293	8,341,792	\$373,945,683	\$4	
F6			5,765	5,920,590	\$262,448,013	\$2	
March	\$464,814,077	\$490,889,486	8,010,147	8,406,831	\$371,851,261	\$4	
April	\$492,567,438	\$520,199,772	8,801,982	8,970,905	\$394,053,951	\$4	
May	\$512,879,272	\$541,651,071	8,357,900	9,282,902	\$410,303,418	\$4	
June	\$509,645,159	\$538,235,529	8,134,081	9,139,116	\$407,716,127	\$4	
July	\$605,162,241	\$639,110,984	10,635,023	10,844,762	\$484,129,793	\$5	
August	\$717,565,679	\$757,820,095	11,592,988	12,744,824	\$574,052,543	\$6	
September	\$524,254,824	\$553,664,775	9,970,425	9,335,601	\$419,403,859	\$4	
Grand Total	\$4,622,380,810	\$4,881,689,811	73,470,603	82,987,323	\$3,697,904,648	\$4,2	

To set up the filter, the Months level was right-clicked and Filter then Edit was selected from the pop-up menu that displayed. In the Select Members window that displayed by default, the More button was clicked then Change Filter Type was selected to open the Select Filter Method window. In that window, Named Set was selected and OK was clicked.

**Note:** Another option in the following window would have been to select Named Set, enter the name of the named set in the quick filter field, and click OK. In that case, the filter would be applied without accessing the Select Named Set Filter window.

Select Filter Method X
O None
O Member List
🔿 User List
Named Set
O Expression
OK Cancel

The Select Named Set Filter window displayed, and the Budget YTD Months named set was selected. The window displayed the members in the named set. Then, OK was clicked to apply the filter.

Select Named Set Filter	X: MONTHS X
Named Set: Budget YTD Months	~
January February March April May June July August September	
Filter Type	OK Cancel

### Named Set Used for a Calculated Measure Item

Here is an example of named sets used for calculated measure items. Both YTD calculated measure items use a named set in their expression. The calculated measure items take into account data from all months up to and including the current month for the last year and current year. More information follows this image.

**Note:** You can create a similar view using measure items with time ranges. The view would need to be one in which the Time Range property is enabled.

IIII + View Name: RepBroker YTD Sales ↓ → View Filter					
RepBroker	Current Yr YTD Sales Units	Last Yr YTD Sales Units			
300	31,341,259	44,599,018			
<u>301</u>	1,689,678	2,400,232			
302	4,692,998	6,578,454			
303	1,809,326	2,524,668			
<u>304</u>	1,875,791	2,616,356			
305	10,180,005	14,202,580			
306	2,390,317	3,306,890			
<u>307</u>	704,599	981,233			
308	1,841,984	2,640,231			
<u>309</u>	1,562,082	2,150,511			
312	7,375,334	10,427,491			
313	8,058,285	11,493,633			
315	2,282,187	3,135,602			
318	861,157	1,177,376			
Grand Total	76,665,003	108,234,275			

The expression for the first measure item is:

IIF([Measures].[Data5 (Actual Sales Sales Units)] = null, null, Sum(CrossJoin({[Time].[Year Based Months Based].[Year Based].[Current Year]},{[Act Sales YTD Months]}),[Measures].[Data5 (Actual Sales Sales Units)]))

This expression uses the Act Sales YTD Months named set and the Actual Sales Sales Units measure item, which is part of the view definition but hidden from display. The expression has been optimized to check whether or not sales units data exists. The expression will be executed only for cases where there is data. Running the expression without this check could be time consuming.

Expression - Curren	T YR YTD SALES UNITS X
View Items and Functions	Expression
<ul> <li>Hierarchies</li> <li>12, RepBroker</li> <li>12, Months</li> <li>Months</li> <li>Attribute Relationships</li> <li>Members</li> <li>12, Weeks</li> <li>12, Year Months</li> <li>Measure Items</li> <li>Data8 (Last Yr YTD Sales Units)</li> <li>Data5 (Actual Sales Sales Units)</li> <li>Data6 (Actual Sales Sales Amount)</li> <li>Data3 (Budget Budget Amount Working)</li> <li>Data1 (Budget Budget Units Working)</li> <li>Data2 (Budget Budget Units Frozen)</li> <li>Data2 (Budget Budget Units Frozen)</li> <li>Functions</li> </ul>	IIF([Measures].[Data5 (Actual Sales Sales Units)] = null, null, Sum(CrossJoin({[Time].[Year Based Months Based].[Year Based].[Current Year]},{[Act Sales YTD Months]}),[Measures]. [Data5 (Actual Sales Sales Units)]))
OK Valid	ate Cancel Help

When building such expressions, you can enter the name of the relevant named set directly into the Expression window. Or, navigate to the appropriate level in the window and click its Members sub-folder to access the Select Filter Method window. For this measure item's expression, the Members sub-folder of the Months level was clicked to access the Select Filter Method window. Named Set was selected, and OK was clicked.

Select Filter Method	×
OK Cancel	

The Act Sales YTD Months named set was selected since the measure item in the expression is Actual Sales Sales Units.

Select Named Set Filter: Months	×
Named Set: Act Sales YTD Months	
January February March April May June July August September	
OK Cancel	

## Potential Sources of Data for use with Pasting Members

Paste Members functionality lets you copy a list of members into Stratum.Viewer, validate the list, and then add valid members to the member list filter or user list definition with which you are working. You can copy members from sources such as:

- <u>A column</u> in a Microsoft Excel spreadsheet.
- <u>A list of members separated by paragraph returns</u> in a Microsoft Word document.
- <u>A comma-delimited list of members</u>, such as from an e-mail or text file. You can remove the commas before the paste via Excel as shown in the last example that follows.

# Excel Example

Here is an example of pasting members while working with the Product level. The Advanced Select Members window had been accessed for that level and then Paste was selected from the More menu. Next, this list of values for Product members was copied from an Excel spreadsheet column.

G	<b>)</b>	• 🚰 🗧 👘	Paste1.xlsx - N	licrosoft Excel			
	Home Insert	Page Layout F	ormulas Data I	Review View Add-I	ns Acrobat	Team 🕝	) – 🗖 X
	· · · · ·	• 11 • <u><u><u><u></u></u></u> • <u>A</u> • Font □</u>	E E E E E E E Alignment G	\$ • % • •.0 •00 •.00 •.0	yles ↓ Ce ↓ Ce	lete ▼ 💽 rmat * 📿	· ⊉7· · ♪A · ·
	A2	<b>+</b> (0	<i>f</i> _* 954622				×
	1	Д	В	С	D	E	F 🛓
1	Products from m	y product line					
2		95462	2				
3		97462	-				
4		91462	1				
5		92462					
6		95432 97402	-1				
8		97402	-1				
9		92402	2				
10		94560	-1				
11		97460	7				
12		91460	2				
13		92461	7				
14		92464	7				
15			1				
AC N	< ► ► Sheet1 <	Sheet2 Sheet	3 🖏				▶ [
Sel	lect destinat Aver	rage: 940735.1538		12229557 🔠 🔲 🖳	100% 😑	U	🕀
_	And the Real Property lies of	_			-		-

The copied text was pasted into the Paste Members window.

Paste Members Webpage Dialog	Sand & Postal	a lotera a Mat	x
Paste a list and click 'Validate'			
954622 974622 914622 954325 974025 924624 924025 945602 974602 914602 924617 924647	Product	Prod Long Description	
Validate	▼	III OK Cancel H	elp

The Validate button was clicked. Valid members were moved to the right side of the window. Invalid members remained in the left side of the window.

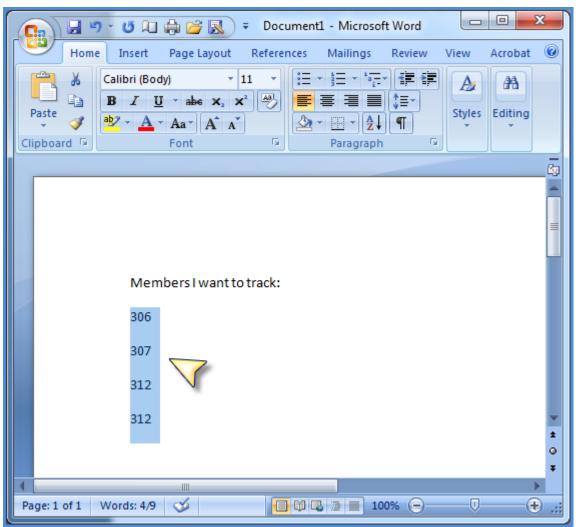
Invalid Members: 3 of 13 Paste a list and click 'Validate'			v	alid Members: 10 of 13
b45602	*	Product	Prod Short Description	Prod Long Descrip
924617		954622	Apple Filling 106oz BR*	
924647		974622	Apple Filling 10602 PL*	
		914622	Apple Filling 1202 BR*	
		924622	Apple Filling 12oz PL*	
		954325	Blueberry Filling 106oz	
		974025	Blueberry Filling 106oz	
		924624	Blueberry Filling 12oz B	
		924025	Blueberry Filling 12oz P	
		974602	Cherry Filling 106oz PL*	
		914602	Cherry Filling 12oz BR*	
	Ŧ	•		•
Validate			OK Ca	ncel Help

The user could have potentially edited the invalid information to correct it by typing in the left side of the window. Or, the user could have pasted or typed additional new members then performed another validate. Instead, the OK button was clicked to return the valid members to the Advanced Select Members window.

	Advanced Select Mem	BERS: PRODUCT	×
	Q	Search By: Product	✓ Contains ✓
Product ▲         0 to 0 of 0       I< I< I         Use search properties to find members	Prod Long Description		Add Add All
□ Product ▲	Prod Long Description		
<ul> <li>Product</li> <li>914602</li> <li>914622</li> <li>924025</li> <li>924622</li> <li>924624</li> <li>954325</li> <li>954622</li> </ul>	Cherry Filling 12 oz BR* Apple Filling 12oz BR* Blueberry Filling 12oz PL* Apple Filling 12oz PL* Blueberry Filling 12oz BR* Blueberry Filling 106oz BR* Apple Filling 106oz BR*		Clear Clear All 10 Selected
	OK Cancel I	More	Help

## Word Example

Similar pasting can be done from Word. Here is an example of RepBroker members in a Word document.



The text was copied from Word then pasted into the Paste Members window.

Paste Members Webpage Dialog	unces of Del	a for use with Pa	sting Members	X
Paste a list and click 'Validate'	ARepBroker			
307 312 312	A RepBroker	RepBr Long Description	on	
	<b>*</b>			
Validate		[	OK Cancel	Help

Here is the window after the Validate button was clicked. The member 312 appeared twice in the pasted text, so it was considered a duplicate member and only counted once in the count of valid members.

🖉 Paste Members Webpage Dialog	_	x
Paste a list and click 'Validate'	Duplicate Members: 1 of 4	Valid Members: 3 of 4
	RepBroker RepBr Short Description	RepBr Long Description
	306 John Trainor	John Trainor
	307 Guy Nelson	Guy Nelson
	312 Mike Hartney	Mike Hartney
	<	4
Validate		OK Cancel Help
Validate		on concer nep

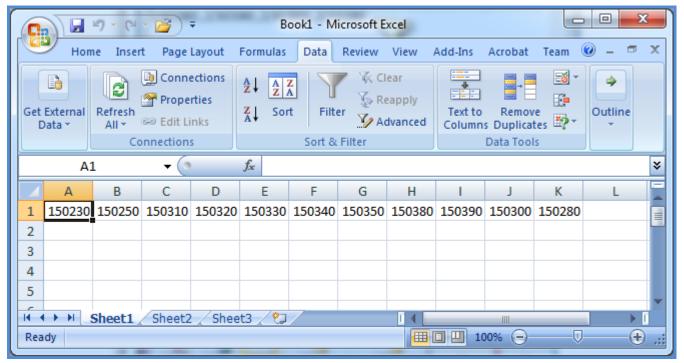
## Text File Example

Here is a list of values for Customer Sold-To members in a text file.

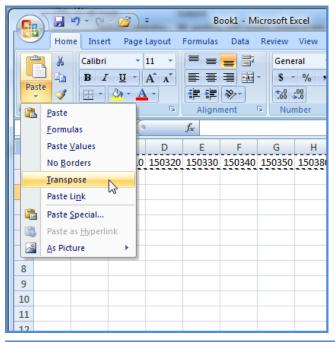
🗍 trackingshiptos.txt - Notepad	
File Edit Format View Help	
µ50230,150250,150310,150320,150330,150340,150350, 150380,150390,150300,150280	*
	Ŧ

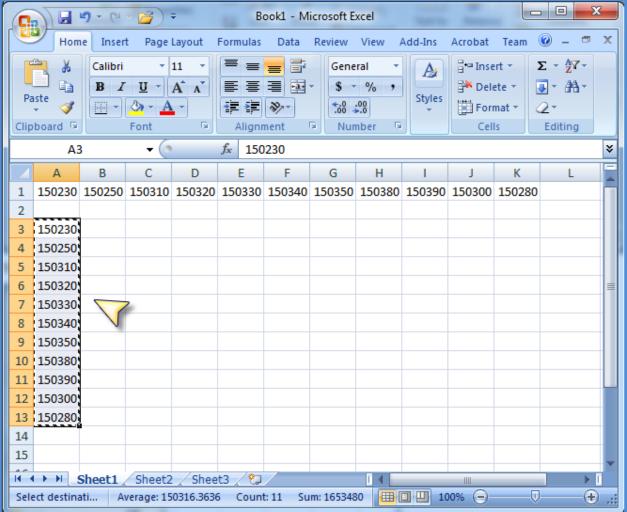
The text was imported into Excel to remove the commas.

		- 0	<b>)</b> =	Boo	ok1 - Mic	rosoft Excel
	Home	Insert	Page Layout	Formulas	Data F	Review View
Get Exter Data		efresh All T	Connections Properties Edit Links	A Z ↓ A Z A Z ↓ Sort	Filter	🔐 Advanced
	*	죔				
From	From		From Other	Existing	E	F
Access	Web	20	Sources * C ernal Data	Connections		
6		Get Ext	ernal Data Fron	n Text		
7		Impor	t data from a te	ext file.		
8		🕜 Pre	ss F1 for more	help.		
<u></u>						
11						
12						



Then copied and pasted via a transpose to place the text into a single column.





Then the text was copied from that column into the Paste Members window.

Paste Members Webpage Dialog		x
Paste Members Webpage Dialog  Paste a list and click 'Validate'  150230 150250 150310 150320 150330 150340 150350 150380 150390 150300 150280	Customer Sold-To SldTo Long Description	
Validate	• III OK Cancel H	elp

Here is the window after the Validate button was clicked. All members were valid and there were no duplicates.

💋 Paste Members Webpage Dialog			x
Paste a list and click 'Validate'			Valid Members: 11 of 11
	Customer	Sold-To SldTo Short Description	SldTo Long Description
	150230	Penn Brands	Penn Brands
	150250	Prestwick Brothers	Prestwick Brothers
	150310	Maple Tree Foods	Maple Tree Foods
	150320	Quebec Foods	Quebec Foods
	150330	Canadian Imports	Canadian Imports
	150340	Alberta Foods	Alberta Foods
	150350	Chicago's Finest	Chicago's Finest
	150380	Packingham Foods	Packingham Foods
	150390	Pacific Providers	Pacific Providers
	150300	Auburn Providers	Auburn Providers
	150280	New York Foods	New York Foods
			N
Validate	-	Ш	Cancel Help

## **Recommendations for View Filters**

Here are some behaviors and recommendations to consider when setting up view filters in your views.

- Multiple Levels in View Filters
- Calculated Measure Items and View Filters

## Multiple Levels in View Filters

Levels in a View Filter <u>need a level filter defined</u> for them to have a filtering impact on a view. This is true whether there is a single level or multiple levels in the View Filter section. The following view has two levels in the View Filter. Region is filtered by a member list.

Filtered With N East	Aembers:	600	2 1 to 40 of 67	() () 1 to 2 of 2
III + View Filter ▼	Region <b>T</b> Product Family			
UPC Global Number	UPC Long Description	Budget Amount Working Q1 2014 to Q3 2014		
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$81,550,650	1,162,531	
<u>0 - 24000 - 12411 - 4</u>	Escalloped Apples 106 oz BR*	\$34,532,971	442,906	
<u>0 - 24000 - 12416 - 4</u>	Lingonberries LS 106 oz BR*	\$469,281	5,313	
0 24000 12419 4	Door Hkell C 106 or DI*	\$33 730 010	520.430	

Product Family is filtered by a user list.

Filtered Wit	Filtered With User List: Product Family 60s					
EEE + Vie	• Vie					
<u>UPC Global Number</u>	$\bigcirc$	Budget Amount Working Q1 2014 to Q3 2014	Budget Units Working Q1 2014 to Q3 2014			
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$81,550,650	1,162,531			
<u>0 - 24000 - 12411 - 4</u>	Escalloped Apples 106 oz BR*	\$34,532,971	442,906			
<u>0 - 24000 - 12416 - 4</u>	Lingonberries LS 106 oz BR*	\$469,281	5,313			
<u>0 - 24000 - 12418 - 4</u>	Pear Hlvs LS 106oz PL*	\$33,730,010	520,430			
<u>0 - 24000 - 12419 - 4</u>	Pear Hlvs LS 106 oz BR*	\$11,305,509	144,914			
<u>0 - 24000 - 12422 - 4</u>	Apple Filling 106oz BR*	\$22,163,347	294,205			
<u>0 - 24000 - 12429 - 4</u>	Apple Filling 12oz PL*	\$28,872,651	810,503			
<u>0 - 24000 - 12430 - 4</u>	Applesauce 106oz BR*	\$25,244,052	327,925			
<u>0 - 24000 - 12431 - 4</u>	Applesauce 106oz PL*	\$101,809,018	1,622,014			
<u>0 - 24000 - 12432 - 4</u>	Blackberries 106oz BR*	\$9,353,277	106,127			
<u>0 - 24000 - 12438 - 4</u>	Sw Cherries Pittd 106oz BR*	\$23,900,987	243,269			
<u>0 - 24000 - 12440 - 4</u>	Cherry Filling 106 oz BR*	\$19,936,894	264,691			
<u>0 - 24000 - 12441 - 4</u>	Peach Hlvs HS 106oz PL*	\$265,508	4,083			
<u>0 - 24000 - 12443 - 4</u>	Peach Slcs HS 12oz PL*	\$968,593	25,087			
<u>0 - 24000 - 12446 - 4</u>	Prunes Pitted 106 oz BR*	\$1,568,703	20,365			
0 24000 12440 4	Channel Tilling 100 an DLS	\$17 417 575	200 520			

The view results change if you remove the filter from either level. The following example shows the view after the member list filter was removed from Region. The view changed to show data for all Regions. The measure item values have increased, and the number of rows returned has increased from 67 to 72.

🔁 🗢 🗠 1 to 40 of 72

### 

III + View Name: View Filters 1

↓ → View Filter Region ▼ Product Family

UPC Global Number	UPC Long Description	Budget Amount Working Q1 2014 to Q3 2014	Budget Units Working Q1 2014 to Q3 2014
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$107,866,368	1,540,531
<u>0 - 24000 - 12411 - 4</u>	Escalloped Apples 106 oz BR*	\$44,870,327	575,424
<u>0 - 24000 - 12416 - 4</u>	Lingonberries LS 106 oz BR*	\$469,281	5,313
<u>0 - 24000 - 12418 - 4</u>	Pear Hlvs LS 106oz PL*	\$44,499,778	686,569
<u>0 - 24000 - 12419 - 4</u>	Pear Hlvs LS 106 oz BR*	\$14,260,630	182,790
<u>0 - 24000 - 12422 - 4</u>	Apple Filling 106oz BR*	\$27,243,730	361,620
<u>0 - 24000 - 12429 - 4</u>	Apple Filling 12oz PL*	\$28,872,651	810,503
<u>0 - 24000 - 12430 - 4</u>	Applesauce 106oz BR*	\$34,785,355	451,834
<u>0 - 24000 - 12431 - 4</u>	Applesauce 106oz PL*	\$131,241,080	2,090,745
<u>0 - 24000 - 12432 - 4</u>	Blackberries 106oz BR*	\$10,988,977	124,672
<u>0 - 24000 - 12438 - 4</u>	Sw Cherries Pittd 106oz BR*	\$28,452,312	289,581
0 24000 12440 4	Charpy Filling 106 of PD*	\$10 036 904	264 601

Copyright 2019 Silvon Software, Inc. *All rights reserved. (Last Revised: November 2019)* 

### **Calculated Measure Items and View Filters**

View Filters affect regular, calculated, and distinct calculated measure items. There is a special case in which a View Filter will not affect calculated and distinct calculated measure items. That case is when a level is used in both the View Filter and the expression for the calculated or distinct calculated measure item. In that case, the View Filter will not impact the calculated or distinct calculated measure item for that level.

The next view has a calculated measure item with an expression that uses the Region Unit level. The expression is ([Region].[Region].[Region].[331],[Measures].[Data2 (Budget Units Working)]).

- 🕀 📥 X		800	🕒 1 to 40 of 102	() () 1 to 3 of	
View Name: View Filters 2					
J → View Filter					
<u>UPC Global Number</u>	UPC Long Description	Budget Amount Working Q1 2014 to Q3 2014	Budget Units Working Q1 2014 to Q3 2014	Budget Units Working Region West 331	
<u>0 - 02749 - 25408 - 6</u>	Asparagus	\$116,213,555	1,545,622	423,304	
<u>0 - 02749 - 99231 - 6</u>	Strawberries	\$79,942,688	1,075,169	295,140	
<u>0 - 02749 - 99267 - 6</u>	Cherries, Bing	\$96,154,822	1,285,136	333,385	
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$107,866,368	1,540,531	378,000	
<u>0 - 13800 - 30321 - 9</u>	Frozen Lasagna Dinner	\$156,537,087	1,608,142	371,753	
<u>0 - 13800 - 78934 - 9</u>	Meatloaf, Frozen	\$150,581,441	1,605,166	348,240	
<u>0 - 24000 - 12411 - 4</u>	Escalloped Apples 106 oz BR*	\$44,870,327	575,424	132,518	
<u>0 - 24000 - 12413 - 4</u>	Pnappl Slcs 12oz PL*	\$56,224,002	1,416,572		
<u>0 - 24000 - 12416 - 4</u>	Lingonberries LS 106 oz BR*	\$469,281	5,313		
<u>0 - 24000 - 12417 - 4</u>	Pnappl Slcs 106 oz BR*	\$4,751,053	59,372	59,372	
<u>0 - 24000 - 12418 - 4</u>	Pear Hlvs LS 106oz PL*	\$44,499,778	686,569	166,139	
<u>0 - 24000 - 12419 - 4</u>	Pear Hlvs LS 106 oz BR*	\$14,260,630	182,790	37,876	
<u>0 - 24000 - 12422 - 4</u>	Apple Filling 106oz BR*	\$27,243,730	361,620	67,415	
<u>0 - 24000 - 12429 - 4</u>	Apple Filling 12oz PL*	\$28,872,651	810,503		
<u>0 - 24000 - 12430 - 4</u>	Applesauce 106oz BR*	\$34,785,355	451,834	123,909	
<u>0 - 24000 - 12431 - 4</u>	Applesauce 106oz PL*	\$131,241,080	2,090,745	468,731	
<u>0 - 24000 - 12432 - 4</u>	Blackberries 106oz BR*	\$10,988,977	124,672	18,545	
0 24000 12422 4	Depend Pitco 106 or PD*	\$408.477	6 223	6 223	

Then the Region level, filtered by member 330, is set up as a View Filter. The View Filter is ignored for the calculated measure item -- notice the measure item values have not changed for the calculated measure item.

Filtered With M	1embers: 🔍 📔 🕜	80	22 1 to 40 of 10	2 COOD 1 to 3 o		
IIII+     Last       J→     View Filter						
UPC Global Number	UPC Long Description	Budget Amount Working Q1 2014 to Q3 2014	Budget Units Working Q1 2014 to Q3 2014	Budget Units Working Region West 331		
<u>0 - 02749 - 25408 - 6</u>	Asparagus	\$84,703,055	1,122,318	423,304		
<u>0 - 02749 - 99231 - 6</u>	Strawberries	\$57,858,450	780,030	295,140		
<u>0 - 02749 - 99267 - 6</u>	Cherries, Bing	\$71,429,033	951,752	333,385		
<u>0 - 06403 - 92736 - 2</u>	Orange Juice Conc.	\$81,550,650	1,162,531	378,000		
<u>0 - 13800 - 30321 - 9</u>	Frozen Lasagna Dinner	\$120,571,548	1,236,389	371,753		
<u>0 - 13800 - 78934 - 9</u>	Meatloaf, Frozen	\$118,012,867	1,256,926	348,240		
<u>0 - 24000 - 12411 - 4</u>	Escalloped Apples 106 oz BR*	\$34,532,971	442,906	132,518		
<u>0 - 24000 - 12413 - 4</u>	Pnappl Slcs 12oz PL*	\$56,224,002	1,416,572			
<u>0 - 24000 - 12416 - 4</u>	Lingonberries LS 106 oz BR*	\$469,281	5,313			
<u>0 - 24000 - 12417 - 4</u>	Pnappl Slcs 106 oz BR*			59,372		
<u>0 - 24000 - 12418 - 4</u>	Pear Hlvs LS 106oz PL*	\$33,730,010	520,430	166,139		
<u>0 - 24000 - 12419 - 4</u>	Pear Hlvs LS 106 oz BR*	\$11,305,509	144,914	37,876		
<u>0 - 24000 - 12422 - 4</u>	Apple Filling 106oz BR*	\$22,163,347	294,205	67,415		
<u>0 - 24000 - 12429 - 4</u>	Apple Filling 12oz PL*	\$28,872,651	810,503			
<u>0 - 24000 - 12430 - 4</u>	Applesauce 106oz BR*	\$25,244,052	327,925	123,909		
<u>0 - 24000 - 12431 - 4</u>	Applesauce 106oz PL*	\$101,809,018	1,622,014	468,731		
<u>0 - 24000 - 12432 - 4</u>	Blackberries 106oz BR*	\$9,353,277	106,127	18,545		
0 - 24000 - 12433 - 4	Pnanni Rites 106oz BR*			6 223		

## Treatment of Time-Related Levels by the Filters Window

Time hierarchies in Stratum.Viewer can be multiple-level hierarchies or single level hierarchies. An example of a multiple-level hierarchy is Year Months with its Year and Months levels. An example of a single level hierarchy is the Months hierarchy with its Months level.

The following example shows how the Filters window treats second levels of multiple-level hierarchies in cases when the second level is not yet drilled to in a view and you filter the level from the window. Stratum.Viewer will drill to that level and apply your filter once you have exited the Filters window.

This view has the Year Weeks hierarchy on columns. The Year level is visible. The Weeks level is also defined to be available in the view (Visible property is set to Yes), but that level hasn't been drilled to yet.

Image: Second state         Image: Second state										Viewer 🗸		
	View Explorer									×		
	Year >>	<u>2014</u>			<u>2013</u>			2012		A 🕌 Tre	nding Weekly Sales Data Parameter Groups Grid	^
<b>▼</b> <u>Product</u> <u>Brand</u>	PBrnd Long Description	Actual Sales Sales Amount	Actual Sales Sales Units	Avg Selling Price	Actual Sales Sales Amount	Actual Sales Sales Units	Avg Selling Price	Actual Sales Sales Amount	Actual Sales Sales Units		Line Rows Columns 4 23 Year Weeks	
	Tip Top Dew Drop	\$31,794,008 \$33,652,760	522,892 825,745		\$57,741,162 \$61,281,720	787,550 1,228,186		\$31,829,230 \$33,965,498			• Year •• Weeks	
005 007	Farm Crisp SugarDrop	\$16,091,106 \$19,432,321	497,882 312,434		\$36,873,415 \$37,056,249	902,401 508,834		\$23,139,725 \$18,573,890	546,750 254,903	⊳ ⊾	View Filter	~
	Farm Fresh First Choice	\$231,291,934 \$141,530,325			\$450,299,984 \$269,380,436			\$242,578,902 \$144,648,375		Properties Filter		×
Grand Total		\$473,792,454	8,998,453	\$52.65	\$912,632,966	14,460,401	\$63.11	\$494,735,621	7,856,704	Sort	None	~
										Total All Others	Yes	~
										Visible	Yes	
										Display Tex	t value	~

The Manage All Filters icon is clicked to open the Filters window. All levels that are defined as visible display in the window; there are 5 of those levels including Year and Weeks.

	FILTERS	×
RepBroker:	302 - Mark Fiedler, 306 - John Trainor, 313 - Eleanor Toman	▼ ×
Year:	No filter exists	Change Filter
Weeks:	No filter exists	<b>x</b>
Product Brand:	001 - Tip Top, 002 - Dew Drop, 005 - Farm Crisp, 007 - SugarDrop, 009 - Far	T X
Product:	No filter exists	▼ ×
	OK	C Cancel

		Select Men	BERS:	WEEKS				×
5 Selected	2014		Q	Search By:	Year Weeks-Year-Value	$\sim$	Contains	$\sim$
					2014			$\sim$
2014			Veek 2		2014			
2014			Veek 2		2014			
2014			Veek 2		2014			
2014		١	Veek 2	24	2014			
2014		V	Veek 2	25	2014			
2014		V	Veek 2	26	2014			
2014		٧	Veek 2	27	2014			
2014		v	Veek 2	28	2014			
2014		٧	Veek 2	29	2014			
2014		٧	Veek 3	30	2014			
2014		٧	Veek 3	31	2014			
2014		٧	Veek 3	32	2014			
2014		٧	Veek 3	33	2014			
2014		V	Veek 3	34	2014			
2014		Ň	Veek 3	35	2014			
2014		V	Veek 3	36	2014			
2014		v	Veek 3	37	2014			
2014		V	Veek 3	38	2014			0
Clear All	0	K Cancel	N	lore			Hel	p

The filter icon for Weeks is clicked, and a few weeks are selected as filters on the level from the Select Members window.

After clicking OK in the Select Members window and then OK in the Filters window, the view is refreshed. Notice that the view is now drilled to the Weeks level that you just filtered and the level reflects your filter.

	FILTERS										×				
RepBroker: 302 - Mark Fiedler, 306 - John Trainor, 313 - Eleanor Toman									<b>▼</b> ×						
Year: No filter exists									<b>▼</b> ×						
Weeks: Week 29, Week 30, Week 31, Week 32, Week 33									▼ ×						
Product Brand: 001 - Tip Top, 002 - Dew Drop, 005 - Farm Crisp, 007 - SugarDrop, 009 - Far							<b>T</b> ×								
Product:		No filter	exists											<b>▼</b> ×	
												ОК		Cance	I
		<b>X</b>	Q		0			800	<b>99</b> 1	to 7 of	7 00	001	to 21 o	of 21	
	Image: Second state         Image: Second state														
↓ → View Filter <b>Y</b> RepBroker															
J → View Fi	lter <b>T</b> RepB	roker													
.]→ View Fi	iter <b>T</b> RepB	iroker 2014													
J→ View Fi	•				Week 30			Week 31			Week 32			Week 33	$\mathbf{)}$
J → View Fil	▼ <u>Year</u> >>	2014 Week 29 Actual Sales Sales	Actual Sales Sales Units	Avg Selling Price	Week 30 Actual Sales Sales Amount	Actual Sales Sales Units	Avg Selling Price	Week 31 Actual Sales Sales Amount	Actual Sales Sales Units	Avg Selling Price	Week 32 Actual Sales Sales Amount	Actual Sales Sales Units	Avg Selling Price	Week 33 Actual Sales Sales Amount	Sale: Sale:
▼ Product Brand	¥ <u>Year</u> >> ¥ Weeks>> PBrnd Long	2014 Week 29 Actual Sales	Sales	Selling Price	Actual Sales Sales	Sales Sales Units	Selling	Actual Sales Sales	Sales	Selling Price	Actual Sales Sales	Sales Sales Units	Selling	Actual Sales Sales	Sale: Sale: Unit:
▼ <u>Product</u> <u>Brand</u> 001 002	Year >> Y Weeks >> PBrnd Long Description	2014 Week 29 Actual Sales Sales Amount \$637,665 \$479,672	Sales Sales Units 31,189 36,893	Selling Price \$20.45 \$13.00	Actual Sales Sales Amount \$924,152 \$695,177	Sales Sales Units 12,996 15,372	Selling Price \$71.11 \$45.22	Actual Sales Sales Amount \$1,234,022 \$1,499,927	Sales Sales Units 16,845 30,079	Selling Price \$73.26 \$49.87	Actual Sales Sales Amount \$309,870 \$811,252	Sales Sales Units 3,850 14,707	Selling Price \$80.49 \$55.16	Actual Sales Sales Amount \$309,870 \$804,749	Sale: Sale: Unit: 9,24 35,29
▼ <u>Product</u> <u>Brand</u> 001 002 005	Year >> Weeks >> PBrnd Long Description Tip Top Dew Drop Farm Crisp	2014 Week 29 Actual Sales Sales Amount \$637,665 \$479,672 \$190,256	Sales Sales Units 31,189 36,893 16,562	Selling Price \$20.45 \$13.00 \$11.49	Actual Sales Sales Amount \$924,152 \$695,177 \$275,734	Sales Sales Units 12,996 15,372 6,901	Selling Price \$71.11 \$45.22 \$39.96	Actual Sales Sales Amount \$1,234,022 \$1,499,927 \$696,949	Sales Sales Units 16,845 30,079 17,711	Selling Price \$73.26 \$49.87 \$39.35	Actual Sales Sales Amount \$309,870 \$811,252 \$436,440	Sales Sales Units 3,850 14,707 10,810	Selling Price \$80.49 \$55.16 \$40.37	Actual Sales Sales Amount \$309,870 \$804,749 \$421,216	Sale: Sale: Unit: 9,24 35,29 25,94
▼ Product Brand 001 002 005 007	Year >> Weeks >> PBrnd Long Description Tip Top Dew Drop Farm Crisp SugarDrop	2014 Week 29 Actual Sales Sales Amount \$637,665 \$479,672 \$190,256 \$223,373	Sales Sales Units 31,189 36,893 16,562 10,492	Selling Price \$20.45 \$13.00 \$11.49 \$21.29	Actual Sales Sales Amount \$924,152 \$695,177 \$275,734 \$323,729	Sales Sales Units 12,996 15,372 6,901 4,372	Selling Price \$71.11 \$45.22 \$39.96 \$74.05	Actual Sales Sales Amount \$1,234,022 \$1,499,927 \$696,949 \$620,816	Sales Sales Units 16,845 30,079 17,711 8,412	Selling Price \$73.26 \$49.87 \$39.35 \$73.80	Actual Sales Sales Amount \$309,870 \$811,252 \$436,440 \$297,087	Sales Sales Units 3,850 14,707 10,810 4,041	Selling Price \$80.49 \$55.16 \$40.37 \$73.52	Actual Sales Sales Amount \$309,870 \$804,749 \$421,216 \$297,087	25,94 9,69
▼ <u>Product</u> <u>Brand</u> 001 002 005	Year >> Yeeks >> PBrnd Long Description Tip Top Dew Drop Farm Crisp SugarDrop Farm Fresh	2014 Week 29 Actual Sales Sales Amount \$637,665 \$479,672 \$190,256	Sales Sales Units 31,189 36,893 16,562 10,492 160,734	Selling Price \$20.45 \$13.00 \$11.49 \$21.29 \$20.26	Actual Sales Sales Amount \$924,152 \$695,177 \$275,734	Sales Sales Units 12,996 15,372 6,901 4,372 66,972	Selling Price \$71.11 \$45.22 \$39.96	Actual Sales Sales Amount \$1,234,022 \$1,499,927 \$696,949 \$620,816	Sales Sales Units 16,845 30,079 17,711 8,412 141,121	Selling Price \$73.26 \$49.87 \$39.35 \$73.80 \$70.57	Actual Sales Sales Amount \$309,870 \$811,252 \$436,440	Sales Sales Units 3,850 14,707 10,810 4,041 74,149	Selling Price \$80.49 \$55.16 \$40.37	Actual Sales Sales Amount \$309,870 \$804,749 \$421,216 \$297,087 \$5,239,095	Sales Sales Units 9,24 35,29 25,94 9,69 177,95

# Using a View Filters vs. a Level Filter

Use a view filter when you want the filter to be in effect no matter what other levels are visible in the view. The view filter will filter the entire view regardless of the levels that have been drilled to in the view. Use a level filter when you want to filter a particular level and any levels under that level in the view drill down path. Filters on individual levels are only active when you have drilled to that level in the view.

This view has a view filter that consists of member A from the ABC Classification Code level.

	/ith Members: 🔍			800	🖸 1 to 25 of 25 🛛
EII+	amples				
↓ → View Filter	ABC Classification	Code			
	J				
	Region >>	East		West	
T <u>RepBroker</u>	Product Brand	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014
Janice Tierney	<u>002</u>	\$14,443,445	338,131		
	<u>003</u>	\$5,508,606	170,232		
	<u>009</u>	\$14,180,149	232,929		
	<u>010</u>	\$11,846,117	164,483		
	<u>011</u>	\$79,358,878	1,602,519		
	<u>012</u>	\$19,633,870	258,246		
	<u>999</u>	\$5,822,962	181,186		
	Janice Tierney Total	\$150,794,027	2,947,727		
Mark Fiedler	<u>002</u>	\$6,155,379	145,689	\$5,134,777	118,315
	<u>003</u>	\$2,932,304	86,205	\$1,378,494	44,880
	<u>009</u>	\$8,898,810	241,004	\$1,895,295	30,060
	<u>010</u>	\$5,341,178	79,800	\$3,428,554	49,743
	<u>011</u>	\$7,841,851	263,294	\$3,437,051	68,960
	<u>012</u>	\$5,572,627	69,194	\$7,136,178	94,117
	<u>999</u>	\$2,894,935	92,203	\$1,464,038	46,074
	Mark Fiedler Total	\$39,637,083	977,388	\$23,874,386	452,149
Michelle Knapp	<u>002</u>	\$3,345,991	75,802	\$1,344,085	34,208
	<u>003</u>	\$369,001	10,337	\$792,715	24,276
	<u>009</u>	\$491,482	7,973	\$2,366,360	38,415
	<u>010</u>	\$1,460,151	23,093	\$1,454,814	21,241
	<u>011</u>	\$1,558,559	31,191	\$2,270,675	45,125
	<u>012</u>	\$5,360,213	69,417	\$4,352,447	57,007
	<u>999</u>	\$763,771	23,922	\$667,855	20,105
	Michelle Knapp Total	\$13,349,168	241,736	\$13,248,952	240,377
Grand Total		\$203,780,278	4,166,851	\$37,123,338	692,526

Wherever you drill to in the view, you will see data relevant to member A. Here is the same view after drilling up from Product Brand to RepBroker. Notice the grand totals are the same as they were in the prior state of the view.

III + View Name: View Filter Examples									
↓ → View Filter <b>Y</b> ABC Classification Code									
Region >>	East		West						
T <u>RepBroker</u>	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014					
Janice Tierney	\$150,794,027	2,947,727							
Mark Fiedler	\$39,637,083	977,388	\$23,874,386	452,149					
Michelle Knapp	\$13,349,168	241,736	\$13,248,952	240,377					
Grand Total	\$203,780,278	4,166,851	\$37,123,338	692,526					

Here is the same view with the ABC Classification Code level positioned on rows, still filtered for member A. The level is visible, so the filter is in effect.

EE + View Name	: View Filter Examples				
↓ → View Filter					
	Region >>	East		West	
T RepBroker	<b>ABC Classification Code</b>	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014
Janice Tierney	Δ	\$150,794,027	2,947,727		
	Janice Tierney Total	\$150,794,027	2,947,727		
Mark Fiedler	A	\$39,637,083	977,388	\$23,874,386	452,149
	Mark Fiedler Total	\$39,637,083	977,388	\$23,874,386	452,149
Michelle Knapp	A	\$13,349,168	241,736	\$13,248,952	240,377
	Michelle Knapp Total	\$13,349,168	241,736	\$13,248,952	240,377
Grand Tota		\$203,780,278	4,166,851	\$37,123,338	692,526

When you drill up in the view, the ABC Classification Code level is hidden; therefore, the ABC Classification Code filter is no longer active. Notice the grand totals are higher than what they were in the prior state of the view. That is because all measure items values for the RepBrokers are being returned versus just the values for items with an ABC Classification Code of A.

Image: View Filter Examples         ↓ →       View Filter								
Region >>	East		West					
T <u>RepBroker</u>	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014	Actual Sales Amount Jan 2014 to Sep 2014	Actual Sales Units Jan 2014 to Sep 2014				
Janice Tierney	\$540,557,780	10,180,005						
Mark Fiedler	\$142,534,177	3,207,275	\$75,915,384	1,485,722				
Michelle Knapp	\$41,236,689	823,724	\$52,627,779	985,602				
Grand Total	\$724,328,646	14,211,004	\$128,543,163	2,471,324				

# **Using Relationship and Empty Filters**

An <u>overview</u> of relationship and empty filters is provided below. Additional information is provided about when to use them and how the filters behave depending on other characteristics of a view. See these sections:

- Period Based Views
- All Others Data and Empty Filters
- <u>Null vs. Non-null Values and Empty Filters</u>
- <u>Calculated Measure Items</u>
- Views with Levels and Measure Items on the Same Axis
- Level Filters and Relationship Filters
- View Filters

### **Overview**

Use the Relationship and Empty Filters to filter out members of a result set where no related data exists. Related data is based on the visible measure items of the view. Filtering out those members where no data exists related to the measure items in the view produces a more focused result set.

By default, the Relationship and Empty Filter properties are enabled (Yes) for rows and columns. If you wanted to see all members on an axis regardless of related data, you would set the Relationship and Empty Filter properties to No. These properties are controlled through the <u>Properties windows for rows</u> and <u>columns</u>.

For example, in a view displaying the current year YTD sales by product and where the Relationship and Empty Filters are enabled, the result set would include only product members that have sales for the current year (related data). When the Relationship and Empty Filter are disabled, the result set would include all products -- those that have sales as well as those that don't have sales.

#### Relationship Filter and Empty Filter = No

Here is the example view with both properties set to No, returning all products. Results show products with and without YTD sales.

|--|

IIII + View Name: Relationship and Empty Filter Combos
 ↓ → View Filter

	▼ Product Category >>	Fresh Vegetables		Grand Total	
Product	Prod Long Description	<ul> <li>Actual Sales Sales Units Jan 2014 to Sep 2014</li> </ul>	Actual Sales Sales Units Jan 2013 to Sep 2013	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Sales Sales Units Jan 2013 to Sep 2013
624B954012	Sweet Onions, Chopped 4B	226,421	314,842	226,421	314,842
624J954012	Sweet Onions, Chopped 4J	203,779	283,358	203,779	283,358
624I954012	Sweet Onions, Chopped 4I	192,458	267,615	192,458	267,615
624H954012	Sweet Onions, Chopped 4H	181,137	251,873	181,137	251,873
624G954012	Sweet Onions, Chopped 4G	169,816	236,131	169,816	236,131
624B954021	Romaine Specialty Salad 4B	160,198	221,828	160,198	221,828
624F954012	Sweet Onions, Chopped 4F	158,495	220,389	158,495	220,389
624B954013	Potatoes - Idaho Russett 4B	158,373	219,667	158,373	219,667
CD400E4040	Technic Letters Called 40	150 170	210.280	150 150	a10 a00

#### Relationship Filter = Yes and Empty Filter = No

Here is the view when just the Relationship is set to Yes. The row count has decreased because results now show only the products that have YTD sales.

	L XI 🏫 🔍 I	600	🖸 1 to 40 of 5536	1 to 4 of 4 🕽 1		
Image: Image: Relationship and Empty Filter Combos         Image: Imag						
	▼ Product Category >>	Fresh Vegetables		Grand Total		
Product	Prod Long Description	<ul> <li>Actual Sales Sales Units Jan 2014 to Sep 2014</li> </ul>	Actual Sales Sales Units Jan 2013 to Sep 2013	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Sales Sales Units Jan 2013 to Sep 2013	
624B954012	Sweet Onions, Chopped 4B	226,421	314,842	226,421	314,842	
624J954012	Sweet Onions, Chopped 4J	203,779	283,358	203,779	283,358	
624I954012	Sweet Onions, Chopped 4I	192,458	267,615	192,458	267,615	
624H954012	Sweet Onions, Chopped 4H	181,137	251,873	181,137	251,873	
624G954012	Sweet Onions, Chopped 4G	169,816	236,131	169,816	236,131	
624B954021	Romaine Specialty Salad 4B	160,198	221,828	160,198	221,828	
624F954012	Sweet Onions, Chopped 4F	158,495	220,389	158,495	220,389	
624B954013	Potatoes - Idaho Russett 4B	158,373	219,667	158,373	219,667	
624B954010	Iceberg Lettuce Salad 4B	158,178	219,280	158,178	219,280	
624E954012	Sweet Onions Chonned 4F	147 174	204 647	147 174	204 647	

#### **Relationship Filter and Empty Filter = Yes**

Here is the view when Empty Filter also is set to Yes. The row count is only 250 after this change because the view only returns products that have YTD sales given the level and member(s) on columns. In this case, returning only products with YTD sales for the Fresh Vegetables member of Product Category.

	L XI 🏫 🔍 I	0	COC 1 to 40 of 250 ( ( ) 1 to 4 of 4		
III + View Na ↓→ View Fi	ame: <i>Relationship and Emp</i> Iter	oty Filter Combos			
	▼ Product Category >>	Fresh Vegetables		Grand Total	
Product	Prod Long Description	<ul> <li>Actual Sales Sales Units Jan 2014 to Sep 2014</li> </ul>	Actual Sales Sales Units Jan 2013 to Sep 2013		Actual Sales Sales Units Jan 2013 to Sep 2013
624B954012	Sweet Onions, Chopped 4B	226,421	314,842	226,421	314,842
624J954012	Sweet Onions, Chopped 4J	203,779	283,358	203,779	283,358
624I954012	Sweet Onions, Chopped 4I	192,458	267,615	192,458	267,615
624H954012	Sweet Onions, Chopped 4H	181,137	251,873	181,137	251,873
624G954012	Sweet Onions, Chopped 4G	169,816	236,131	169,816	236,131
624B954021	Romaine Specialty Salad 4B	160,198	221,828	160,198	221,828
624F954012	Sweet Onions, Chopped 4F	158,495	220,389	158,495	220,389
624B954013	Potatoes - Idaho Russett 4B	158,373	219,667	158,373	219,667
6248054010	Techora Lottuce Colod 4P	158 178	210 280	120 170	110 100

### **Period Based Views**

For period based views that have levels from time hierarchies visible on rows or columns, it is recommended that you set the Relationship Filter and Empty Filter properties to No for the axis where the time levels are used. This will ensure that all periods will display in the view, even those for which no data exists.

#### Example 1

Levels from the Weeks time hierarchy are on rows in this view. Both Relationship and Empty Filter are No, which means all weeks display -- even those where there is no related data. Rows for all 52 weeks display in calendar order.

III + View Name: ↓→ View Filter	Weekly Sales with Emp	otyFilter				
→ view ritter						
<b>▼</b> Product >>	620A914004		All Others		Grand Total	
Prod Long Description	FrtCktail HS 12 oz BR* 0A					
<u>Weeks</u>	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units
Week 1			\$270,847,881	4,747,679	\$270,847,881	4,747,679
Week 2			\$262,296,006	4,675,739	\$262,296,006	4,675,739
Week 3			\$262,573,713	4,684,978	\$262,573,713	4,684,978
Week 4			\$264,434,998	4,716,801	\$264,434,998	4,716,801
Week 5	\$3,851	87	\$465,723,116	8,337,493	\$465,726,967	8,337,580
Week 6	\$3,851	87	\$228,126,968	4,129,746	\$228,130,818	4,129,833
Week 7	\$6,595	149	\$233,485,768	4,229,869	\$233,492,364	4,230,018
Week 8	\$3,851	87	\$232,594,744	4,204,751	\$232,598,595	4,204,838
Week 9	\$10,796	244	\$430,329,745	7,780,639	\$430,340,541	7,780,883
Week 10	\$3,985	91	\$223,440,646	4,057,691	\$223,444,632	4,057,781
Week 11	\$3,985	91	\$235,359,251	4,276,195	\$235,363,236	4,276,285
Week 12	\$3,985	91	\$239,654,553	4,358,835	\$239,658,538	4,358,926
Week 13	\$11,070	252	\$239,618,440	4,371,923	\$239,629,510	4,372,174
Week 14	\$3,985	91	\$400,946,905	7,264,802	\$400,950,890	7,264,893
Week 15			\$239,073,564	4,326,664	\$239,073,564	4,326,664
Week 16			\$257,422,344	5,615,653	\$257,422,344	5,615,653
Week 17			\$254,074,802	4,612,384	\$254,074,802	4,612,384
Week 18			\$475,959,021	8,605,724	\$475,959,021	8,605,724

Here is the same view with Relationship and Empty Filter set to Yes. Only the weeks that have related data display.

- 0								
III + View Name ↓ → View Filter	III+ View Name: <i>Weekly Sales with EmptyFilter</i>							
<b>▼</b> Product >>	620A914004		All Others		Grand Total			
Prod Long Description	FrtCktail HS 12 oz BR* 0A							
<u>Weeks</u>	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units	Actual Sales Sales Amount	Actual Sales Sales Units		
Week 5	\$3,851	87	\$465,723,116	8,337,493	\$465,726,967	8,337,580		
Week 6	\$3,851	87	\$228,126,968	4,129,746	\$228,130,818	4,129,833		
Week 7	\$6,595	149	\$233,485,768	4,229,869	\$233,492,364	4,230,018		
Week 8	\$3,851	87	\$232,594,744	4,204,751	\$232,598,595	4,204,838		
Week 9	\$10,796	244	\$430,329,745	7,780,639	\$430,340,541	7,780,883		
Week 10	\$3,985	91	\$223,440,646	4,057,691	\$223,444,632	4,057,781		
Week 11	\$3,985	91	\$235,359,251	4,276,195	\$235,363,236	4,276,285		
Week 12	\$3,985	91	\$239,654,553	4,358,835	\$239,658,538	4,358,926		
Week 13	\$11,070	252	\$239,618,440	4,371,923	\$239,629,510	4,372,174		
Week 14	\$3,985	91	\$400,946,905	7,264,802	\$400,950,890	7,264,893		
Week 31	\$1,474	34	\$666,132,486	11,923,043	\$666,133,960	11,923,077		
Week 37	\$1.474	34	\$314 153 761	5 589 879	\$314 155 935	E ERO 013		

#### Example 2

Levels from the Year Months time hierarchy are on rows in this view. Here is the view where both Relationship and Empty Filter are No, which means the rows for December through October of 2014 still display even though there is no related data yet for those months (the current month of the year is September, so no data exists yet for the months after that current month).

<ul> <li>Wiew Name: Period Based Rel and EmptyFilter</li> <li>↓ → View Filter</li> </ul>					
▼ ▼ <u>Year</u>	<u>Months</u>	Actual Sales Sales Amount	Actual Sales Sales Units		
2014	<u>January</u>	\$350,714,364	6,258,847		
	February	\$322,332,391	5,825,361		
	March	\$361,004,874	6,553,215		
	<u>April</u>	\$327,807,806	6,867,712		
	May	\$352,020,685	7,798,802		
	<u>June</u>	\$375,671,295	8,910,194		
	<u>July</u>	\$391,977,666	9,613,083		
	August	\$485,764,510	12,744,274		
	September	\$569,861,272	12,093,515		
(	<u>October</u>				
	November				
	December				
	2014 Total	\$3,537,154,864	76,665,003		
2013	<u>January</u>	\$650,655,727	11,579,068		
	February	\$549,211,669	9,929,320		
	March	\$652,242,257	11,862,018		
	<u>April</u>	\$645,861,506	11,733,747		
	May	\$468 934 747	8 413 481		

Here is the same view with Relationship and Empty Filter set to Yes.

+ View Name: Period Based Rel and EmptyFilter						
		ased Rel and EmptyFilte	er			
↓ → View Filte	er					
_						
🔻 🕇 <u>Year</u>	<u>Months</u>	Actual Sales Sales Amount	Actual Sales Sales Units			
<u>2014</u>	<u>January</u>	\$350,714,364	6,258,847			
	February	\$322,332,391	5,825,361			
	March	\$361,004,874	6,553,215			
	<u>April</u>	\$327,807,806	6,867,712			
	May	\$352,020,685	7,798,802			
	June	\$375,671,295	8,910,194			
	July	\$391,977,666	9,613,083			
	<u>August</u>	\$485,764,510	12,744,274			
	September	\$569,861,272	12,093,515			
	2014 Total	\$3,537,154,864	76,665,003			
2013	<u>January</u>	\$650,655,727	11,579,068			
	February	\$549,211,669	9,929,320			
	March	\$652,242,257	11,862,018			
	<u>April</u>	\$645,861,506	11,733,747			
	May	\$468 934 747	8 413 481			

## All Others Data and Empty Filters

The Empty Filter setting has no impact on All Others rows and columns. If an All Others row or column has no data and Empty Filter is set to Yes, that empty row or column will remain in the view.

→ View Filter	: All Others and Empty Fi			View Explorer	and Franks Filters	
<u>Ship-To</u> <u>Territory</u>	STerr Long Description	Daily Sales Amount Jun 17 2014 to Sep 15 2014	Daily Sales Units Jun 17 2014 to Sep 15 2014	🌗 Parame	and Empty Filters eter Groups	
100	Southwest	\$1,083,805	21,737		ws	
101	South Central	\$2,429,386	55,702		Ship-To Territory	
102	Gulf Coast	\$1,446,060	31,767	► ¹ 2,	Product ABC Class	
103	Midlantic	\$1,560,213	35,775		Product	
.104	New England	\$3,145,793	71,858	<u> </u>	•	
.105	Great Lakes	\$447,905	9,307	Properties - Row	s	
.106	Great Plains	\$1,570,445	35,951	Drilldown View	None	
107	Northwest	\$1,023,632	21,883	Repeating Values	No	
.108	Western Provinces	\$1,169,909	27,338			
.109	Central Provinces	\$1,516,509	31,967	Totals Default	Yes	
<u>111</u>	Eastern Atlantic Provinces	\$2,550,581	57,743	All Others Default	Yes	
II Others				Relationship Filter	Yes	
Grand Tota	1	\$17,944,239	401,028	Empty Filter	Yes	
				Axis Filter		

#### Null vs. Non-null Values and Empty Filters

The Empty Filter only considers cells to be empty when they have null or no data in them. Cells with zero (0) or text are not considered empty and therefore will not be excluded from the result set.

#### **Calculated Measure Items**

The Relationship Filter considers all visible measure items (regular and calculated) when determining which members to include in the result set. This means that each calculated measure item expression is performed for all members. In cases where the expression contains a constant or an attribute relationship, this can cause an unexpected result set. In cases where the expression is time consuming, view performance can be impacted.

When an expression contains a constant or an attribute relationship, the calculated measure item produces a nonnull value for every member, this results in the Relationship Filter not excluding any members from the result set since every member has "related" data. For example, if a calculated measure item expression includes an attribute relationship, then every member will have related data. You can set up conditions in the expression for the calculated measure item to be executed only under certain conditions. An example follows.

The Extended List Price measure item in the next view is a calculated measure item which has the expression:

[Product].[Product].Properties("Prod Current List Price") * [Measures].[Data13 (Actual Sales Sales Units Jan 2014 to Sep 2014)]

The Prod Current List Price in the expression is an attribute relationship. Every product has a list price, which means every product will have an Extended List Price result and no rows will be removed from the view by the relationship filter. If the calculation is made conditional to only execute when YTD sales units exists, then the view will contain only those products that have YTD sales units.

		600011	o 40 of 5582 ( 0 0 1 to 2 of 2					
			3 40 6T 5582					
EEE + View Name: Calcula	tions and Rel/Empty Filt	ters						
↓ → View Filter								
Product (	Prod Current List Price	<ul> <li>Actual Sales Sales Units Jan 2014 to Sep 2014</li> </ul>	Ext List Price					
Applesauce 106oz PL* 5B	65	286,688	\$18,634,709.28					
Pnappi Sics 12 oz BR* 5B	48	261,553	\$12,554,536.11					
Peach Slcs LS 12oz BR* 5B	47	259,604	\$12,201,387.43					
Applesauce 106oz PL* 5J	65	258,019	\$16,771,238.53					
Applesauce 106oz PL* 5I	65	243,685	\$15,839,502.93					
Applesauce 12oz PL* 5B	41	243,543	\$9,985,255.10					
	109	238,731	\$26,021,686.76					
Meatloaf, Frozen 4B	107	238,676	\$25,538,319.52					
Apples Red Delicious 4B	46		\$10,916,327.65					
Pnappi Sics 12 oz BR* 53	48	235,398	\$11,299,082.64					
Peach Slcs LS 12oz BR* 5J	47		\$10,981,248.78					
Applocauco 106oz DL* EH			\$14 007 767 44					
				-				
		RESSION - EXT LIST PRICE		×				
View Items and Functions		Expression						
▲ ↓ Hierarchies			t].Properties("Prod Current List Price") * 13 (Actual Sales Sales Units Jan 2014 to	~				
▲ 12, Product		Sep 2014)]						
	Relationships							
	.ong Description							
	Current List Price							
Members	Members							
▷ 12, Product Brand								
▷ 12 Product Category								
▷ 12, Product ABC Class	55							

t Category Role

Here is the expression, modified to check for YTD sales units. This optimized expression will not proceed with the expression calculation in cases where no YTD Sales Units exists

IIF([Measures].[Data13 (Actual Sales Sales Units Jan 2014 to Sep 2014)] <> Null,

[Product].[Product].Properties("Prod Current List Price") * [Measures].[Data13 (Actual Sales Sales Units Jan 2014 to Sep 2014)], null)

Here is the updated view, which now has fewer rows because the relationship filter removed rows without YTD Sales units.

III + View Name: Calculations and Rel/Empty Filters						
↓ → View Filter						
Product	Prod Current List Price	<ul> <li>Actual Sales Sales Units Jan 2014 to Sep 2014</li> </ul>	Ext List Price			
Applesauce 106oz PL* 5B	65	286,688	\$18,634,709.28			
Pnappi Sics 12 oz BR* 5B	48	261,553	\$12,554,536.11			
Peach Slcs LS 12oz BR* 5B	47	259,604	\$12,201,387.43			
Applesauce 106oz PL* 53	65	258,019	\$16,771,238.53			
Applesauce 106oz PL* 5I	65	243,685	\$15,839,502.93			
Applesauce 12oz PL* 5B	41	243,543	\$9,985,255.10			
Frozen Lasagna Dinner 4B	109	238,731	\$26,021,686.76			
Meatloaf, Frozen 4B	107	238,676	\$25,538,319.52			
Apples Red Delicious 4B	46	237,311	\$10,916,327.65			
Pnappi Sics 12 oz BR* 53	48	235,398	\$11,299,082.64			
Peach Slcs LS 12oz BR* 53	47	233,644	\$10,981,248.78			
Applesauce 106oz PL* 5H	65	229,350	\$14,907,767.44			
Sweet Onione Channed 4P	£7	226 421	\$14.038.123.71			

The next view contains YTD calculated measure items for sales amount and units. The expressions for both measure items use named sets and therefore were optimized by making them conditional based on the existence of related data. The YTD calculations will execute only when Actual Sales Sales Amount and Actual Sales Sales Units respectively are not null. Here is the expression for the YTD Sales Amount measure item. A similar expression was used for the YTD Sales Units measure item.

IIF([Measures].[Data1 (Actual Sales Sales Amount)] = null, null, Sum(CrossJoin({[Time].[Year Based Months Based].[Year Based].[Current Year]},{[Act Sales YTD Months]}),[Measures].[Data1 (Actual Sales Sales Amount)]))

<ul> <li>III + View Name: RepBroker YTD Sales \$ and Units</li> <li>↓ → View Filter</li> </ul>					
RepBroker	YTD Sales Amount	YTD Sales Units			
300	\$1,236,249,042	31,341,259			
301	\$80,279,499	1,689,678			
302	\$218,449,561	4,692,998			
303	\$93,864,469	1,809,326			
<u>304</u>	\$94,960,867	1,875,791			
305	\$540,557,780	10,180,005			
306	\$123,739,278	2,390,317			
307	\$36,226,887	704,599			
308	\$95,845,090	1,841,984			
309	\$78,406,950	1,562,082			
312	\$335,926,577	7,375,334			
313	\$446,627,746	8,058,285			
315	\$112,408,366	2,282,187			
318	\$43,612,752	861,157			
Grand Total	\$3,537,154,864	76,665,003			

### Views with Levels and Measure Items on the Same Axis

When a view has levels and measure items on the same axis, only members that have null data for all measure items will be removed by a Relationship and Empty Filter.

#### Level Filters and Relationship Filters

Relationship Filters on one axis will ignore level filters on the opposite axis when determining which members have related data. For example, this view has a filter on the Customer Class level in columns that returns class 91. Relationship Filter is enabled for rows and returns all Distribution Channels with YTD Sales Units. Once the Customer Class filter is applied, the result set may contain empty rows. In this case two distribution channels do not have any YTD Sales Units for Customer Class 91, but do have YTD Sales for another Customer Class. These empty rows could be removed by enabling the Empty Filter.

		0 60	22 1 to 4 of 4	1 to 2 of 2	
Image: Levels Opposite Axis       ↓ →       View Filter					
	▼ Customer Class >>	91	Grand Total		
	<b>CClas Long Description</b>	CAN Customer			
Distribution Channel	DsChn Long Description		Actual Sales Sales Units Jan 2014 to Sep 2014		
DIR	Direct				
INB	Indirect - Broker				
INW	Indirect - Wholesaler	3,251,475	3,251,475		
Grand Total		3,251,475	3,251,475		

Here is the view after Empty Filter has been enabled on rows.

- C - C - C - C - C - C - C - C - C - C					
Image: Levels Opposite Axis         ↓ →         View Filter					
	▼ Customer Class >>	91	Grand Total		
_	CClas Long Description	CAN Customer Actual Sales Sales Units	Actual Sales Sales Units		
Distribution Channel	DsChn Long Description	Jan 2014 to Sep 2014			
INW	Indirect - Wholesaler	3,251,475	3,251,475		
Grand Total		3,251,475	3,251,475		

#### **View Filters**

The sequence in which filters are executed in relation to View Filters is View Filter first, then Relationship Filter, and then Empty Filter. Only data that meets the View Filter criteria will be considered by the Relationship Filter.

# FAQ's

# Can Measure Items with Conditional Formatting including Images and Indicators be included in a Filter?

Yes. When a measure item with an associated image or indicator is filtered, only the value of the measure item is used in the filter. The image and indicator are ignored by the filter.

# What Does "Not Mapped" Mean in Views?

A row or column of "Not Mapped" data in a view means that measure item data exists for a period of time that has not been defined in Stratum Administration. Such measure item data is assigned to a "Not Mapped" member so you can still see the data in the view.

Image: Second state       Image: Second state<							
▼ <u>Year</u> <u>Based</u>	Year Based Quarters Based-Year Based-Abs Year	Quarters Based	Daily Sales Daily Sales Amount	Daily Sales Daily Sales Units			
Last Year	2015	2 Quarters Ago	\$1,557,900	115,200			
		Previous Qtr	\$7,146,190	192,697			
		Current Quarter	\$509,721,493	538,659			
	(	Not Mapped	\$689,881	102,312			
		Last Year Total	\$519,115,465	948,868			
Current Year	2016	2 Quarters Ago	\$2,129,130	157,440			
		Previous Qtr	\$9,335,956	196,929			
		Current Quarter					
	(	Not Mapped	\$1,589,775	280,256			
		<b>Current Year Total</b>	\$13,054,861	634,625			
Grand Total			\$532,170,326	1,583,494			

The view in the prior example has levels from Year Based Quarters on rows. Notice that each year has a "Not Mapped" row of Daily Sales data. This means that there are insufficient based quarter time periods defined in Stratum. Administration. In this example, an additional based quarter definition for a 3 Quarters Ago period needs to be defined in Stratum. Administration. After that, the previously unmapped data will be assigned to the 3 Quarters Ago period and display in the view for that member of Year Based. Here is the view after the period has been defined.

Y <u>Year</u> <u>Based</u>	Year Based Quarters Based-Year Based- Abs Year	Quarters Based	Daily Sales Daily Sales Amount	Daily Sales Daily Sales Units
Last Year	2015	3 Quarters Ago	\$689,881	102,312
		2 Quarters Ago	\$1,557,900	115,200
		Previous Qtr	\$7,146,190	192,697
		Current Quarter	\$509,721,493	538,659
		Last Year Total	\$519,115,465	948,868
Current Year	2016	3 Quarters Ago	\$1,589,775	280,256
		2 Quarters Ago	\$2,129,130	157,440
		Previous Qtr	\$9,335,956	196,929
		Current Quarter		
		<b>Current Year Total</b>	\$13,054,861	634,625
Grand Total			\$532,170,326	1,583,494

## What Does "Not Valid" Mean in Views and Filter Windows?

A row or column of "Not Valid" data in a view means that a time level in the view does not apply to some of the measure items in the view. Such measure items have their data assigned to the "Not Valid" member so you can still see their data in the view.

	Image: Second state         Image: Second state							
III - View Na ↓ → View Fil	me: <i>Overall Sales,</i> ter	Budget, Forecast	by Year		View Explorer ×  Overall Sales, Budget, Forecast by Year			
Year	Daily Sales Daily Sales Amount	Actual Sales Sales Amount	Budget Budget Amount Frozen	Forecast Baseline Forecast	Parameter Groups			
2006 2007					A Rows			
2008 2009 2010					• Year •• Days			
<u>2011</u> 2012	\$996,282,287				Columns			
2013 2014	\$1,081,490,510 \$1,351,863,138				Measure Items Presentation			
2015 2016					under the second			
Not Valid Grand Total	\$3,429,635,936	\$14,389,522,497 \$14,389,522,497	\$15,649,612,359 \$15,649,612,359	1,671,369,633 1,671,369,633				

The view in the prior example has levels from Year Days on rows. The levels are applicable to the Daily Sales measure item in the view. There is Daily Sales data for years 2012 through 2014. The Year Days levels are not valid for the other three measure items of Actual Sales, Budget, and Forecast. Data for those three measure items gets assigned to the "Not Valid" member for Year Days. The "Not Valid" member also will show up in related filtering windows for Year Days such as in the Select Members window.

Consider choosing a time dimension that is applicable to all measure items in the view. In the following example, using Year Months instead of Year Days eliminates the "Not Valid" row. Year Months is valid for all four measure items. Here is the updated view after changing the time dimension.

			00	<b>20</b> 2 1 to 13 o	f 13 (1 to 4 of 4 Viewer V
III - View Na ↓ → View Fil	ime: <i>Overall Sales,</i> ter	Budget, Forecast i	by Year		View Explorer ×
Year	Daily Sales Daily Sales Amount	Actual Sales Sales Amount	Budget Budget Amount Frozen	Forecast Baseline Forecast	Parameter Groups Grid
2006 2007 2008					A Rows
2009 2010					• Year •• Months
2011 2012	\$996,282,287	\$3,840,207,548			Columns
2013 2014	\$1,081,490,510 \$1,351,863,138	\$7,012,160,085 \$3,537,154,864	\$5,108,428,009 \$4,819,744,955	401,694,827 695,251,224	<ul> <li>View Filter</li> <li>Measure Items</li> </ul>
2015 2016			\$5,721,439,395	574,423,582	Presentation Charts

# Why can't I Access the Select Members Window?

This happens if administrative settings are set up such that only the <u>Advanced Selected Members window</u> is available for a level. Administrators may choose to set up the application that way for levels with a large number of members, for example, the Lot level. In such cases, the Simple Select option will not display when you click the More button in the Advanced Select Members window.

# Why can't I Filter or Sort Cumulative Calculated Measure Items?

The results of a cumulative calculation are accumulating in nature; therefore, sorting and filtering functionality is not available on calculated measure items that use cumulative functions in their expression. Those functions include the Cumulative Total, Cumulative Percent of Total, ABC Cumulative, and ABC Cumulative Percent of Total functions.

- Sort and Filter options will not display on the <u>pop-up menu</u> of a calculated measure item that uses a cumulative function.
- Sort and Filter properties will be disabled in the **Properties window** for those measure items.
- Filtering those types of measure items will not be permitted when using the Data tab of the Filters window.
- If a non-cumulative calculated measure item has been sorted or filtered and you want to change it to a cumulative calculated measure item, you must first remove the sorting or filtering.

The view that follows shows an example of this scenario. The "Percent of Total" calculated measure item can be sorted and filtered because it does not perform a cumulative calculation. The "Cumulative % of Total" calculated measure item cannot be sorted and filtered.

<ul> <li>Wew Name: RepBroker Cumulative Sales</li> <li>↓→ View Filter</li> </ul>									
T <u>RepBroker</u>	Product Category	▲ Actual Sales Jan 2014 to Sep 2014	Percent of Total	Cumulative % of Total					
Mary Lopez	Frozen Fruit Products	\$5,029,230	.90%	.90%					
	Pork	\$7,651,423	1.37%	2.27%					
	Beef	\$11,814,665	2.11%	4.38%					
	Frozen Prepared Dinners	\$15,690,970	2.81%	7.19%					
	Fresh Fruit	\$19,235,673	3.44%	10.63%					
	Canned Fruit	\$25,735,340	4.60%	15.23%					
	Fresh Vegetables	\$27,251,065	4.87%	20.11%					
	Mary Lopez Total	\$112,408,366							
Eleanor Toman	Frozen Fruit Products	\$9,455,123	1.69%	21.80%					
	<u>Pork</u>	\$17,749,079	3.17%	24.97%					
	<u>Beef</u>	\$18,908,033	3.38%	28.36%					
	Fresh Fruit	\$32,031,428	5.73%	34.09%					
	Frozen Prepared Dinners	\$44,281,161	7.92%	42.01%					
	Fresh Vegetables	\$47,904,721	8.57%	50.58%					
	Canned Fruit	\$276,298,202	49.42%	100.00%					
	Eleanor Toman Total	\$446,627,746							
Grand Total		\$559,036,113							

Here's the pop-up menu for Percent of Total, with the Sort and Filter options:

Copy Select All Occurrences Select All	
Add	۲
Edit	
Delete	
Hide	
	<u> </u>
Sort	P
Sort Filter	)
	) •
Filter	) }
Filter Conditional Format	•
Filter Conditional Format Actions	•

Here's the pop-up menu for Cumulative Percent of Total, without Sort and Filter options:

Add Edit Delete Hide
Delete
Hide
Conditional Format
Actions 🕨
Transpose
View Explorer
Properties

The "Percent of Total" calculated measure item in the next view has a Recursive Top Count filter applied to it. If you attempted to change the expression for "Percent of Total" to a cumulative percent of total, a message would display stating that you need to remove the filter before the cumulative function can be applied to the expression.

	+ View Name: <i>RepBroker Cumulative Sales</i> ↓ → View Filter								
↓ → View Filter			Recursive	e Top Count 5					
T <u>RepBroker</u>	Product Category	Actual Sales Jan 2014 to Sep 2014		Percent of Total	Cumulative % of Total				
Mary Lopez	Fresh Vegetables	\$27,251,065		4.87%	6.37%				
	Mary Lopez Total	s	27,251,065						
Eleanor Toman	Fresh Fruit	s	32,031,428	5.73%	13.86%				
	Frozen Prepared Dinners	\$	44,281,161	7.92%	24.21%				
	Fresh Vegetables	\$	47,904,721	8.57%	35.41%				
	Canned Fruit	\$2	76,298,202	49.42%	100.00%				
	Eleanor Toman Total	\$4	00,515,511						
Grand Total		\$4	27,766,577						

Copyright 2019 Silvon Software, Inc. *All rights reserved. (Last Revised: November 2019)* 

# Why Did a Level That I Filtered Get Moved to the View Filter Section of My View?

When you add a new filter to your view, the Filters window in Stratum. Viewer automatically moves that level to the View Filter section. An example follows.

*Note: If the level in question is the second level of a time hierarchy, the level is treated differently than what is described in this topic. See <u>Treatment of Time-related Levels by the Filters Window</u>.

In this view, the Product level currently displays and you can see other levels that are available to drill to in view explorer including RepBroker.

★ RepBroker Sales Achievement Percentage																	
			9 0		123		2	Show	ai e	000	1 to	30 of 5	005	0000	) 1 to 3	) of 3	0
Rows:       IProduct: All × > IIProduct Brand × IIProduct Category × IIProduct Family × IIRepBroker × +         Columns:       IShip-To Territory: Filtered × > IIShip-To Territory Sales Mngr × +																	
View Filter: +																	
<b>Y</b> Ship-To Territory	<u>1102</u>						<u>1103</u>							<u>1106</u>			
STerr Long Description	Gulf Coast						Midlantic							Great Plains			
Product	Actual Sales Amount Q1 2017 to Q3 2017		Achievemeni Percentage Sales vs Budget Amount Q1 2017 to Q3 2017		Actual Sales Return Amount Q1 2017 to Q3 2017	Sales Return	Actual Sales Amount Q1 2017 to Q3 2017	Budget Amount Frozen Q1 2017 to Q3 2017	Perce Sale Buo Amo Q1 20	vement entage es vs lget ount 017 to 2017	Average Selling Price Q1 2017 to Q3 2017	Actual Sales Return Amount Q1 2017 to Q3 2017	Sales Return	Actual Sales Amount Q1 2017 to Q3 2017	Budget Amount Frozen Q1 2017 to Q3 2017	Perce Sale Bu	enta es v dget ioun 017
Pear Hivs LS 12 oz BR* 0A			▷ 0%			(8)			$\triangleright$	0%				\$248	\$153		16
Peach Hlvs HS 12 oz BR* 0A			▷ 0%				\$1,855	\$1,144		162%	\$44.81	(\$362)	(8)			$\triangleright$	
Applesauce 12oz BR* 0A	\$1,080	\$666	▲ 162%	\$43.48	(\$477)	(11)	\$3,354	\$2,068		162%	\$43.40	(\$466)	(11)	\$4,867	\$3,001		16
FrtCktail HS 12 oz BR* 0A			▷ 0%				\$17,004	\$10,484		162%	\$44.01	(\$849)	(19)			$\triangleright$	
Pear Sics LS 12 oz BR* 0A	\$3,197	\$1,971	<b>1</b> 62%	\$44.55	(\$2,266)	(50)			$\triangleright$	0%				\$1,224	<b>\$</b> 755		16
Peach Hivs LS 12 oz BR* 0A			▷ 0%				\$9,295	\$5,731		162%	\$44.31	(\$622)	(14)	\$9,847	\$6,071		16
Peach Slcs LS 16 oz BR* 0A			▷ 0%				\$3,198	\$1,972		162%	\$55.17	(\$451)	(8)	\$3,194	\$1,969		16
Pear 6oz LnchPk LS 0A			▷ 0%						$\triangleright$	0%				\$20,983	\$12,937		16
Mand Org Pcs 12oz BR* 0A			▷ 0%				\$3,081	\$1,900		162%	\$50.74	(\$719)	(14)			$\triangleright$	
Escalloped Apples 12 oz BR* 0A			▷ 0%				\$6,868	\$4,235		162%	\$62.21	(\$675)	(11)	\$11,717	\$7,224		16
Peach Sics HS 12 oz BR* 0A	\$373	\$230	▲ 162%	\$45.07	<b>(\$</b> 759)	(17)	\$14,309	\$8,822	•	162%	\$43.93	<b>(\$</b> 713)	(17)	\$29,312	\$18,073	•	16 '

The Manage All Filters icon is clicked, and the Filters window shows all levels available (not hidden) for the view. The Change Filter icon is clicked for the RepBroker level.

			7	RepBr	oker	Sale	s Acl	niever	nent	Percen	tage			
		a I I		9 Q	I 🛛 🍸	123			Show .		9 <mark>9</mark> 1 to	30 of 5	5005	000
Rows:	II Product: /	<u>All</u> × > 3	Produc	t Brand 🛛 🗶	ा Produc	Mana	ige All	Filters			r>	c	+	
Columns:	Ship-To T	erritory: Fi	tered ×	> II Ship	-Tc Territ	q	-	filters app or more f		/our data. time.				
View Filter:	+									➡ Learn Mo				
T Chin	To Tomitom.	1102						1102		Learning				1106
	<u>To Territory</u>   Description	Gulf Coast						Midlantic						Great Pla
STCH Long	Description		Budaet	Achievement	Averade	Actual	Actual			Achievement	Averade	Actual	Actual	

			Filters		×
Levels	Data	Axis			
Ship-To Territory:	1102 - Gul	lf Coast, 1103 - Mi	dlantic, 1106 - Great Plains, 1111 - Eastern Atlanti	T	×
Ship-To Territory S	No filter ex	rists		T	×
Product:	No filter ex	kists		T	×
Product Brand:	No filter ex	kists		T	×
Product Category:	No filter ex	rists		T	×
Product Family:	No filter ex	rists		T	×
RepBroker:	No filter ex	rists			× hange Filter
			ОК		Cancel

	f	Select Members: RepBroker	×
3 Selected		Q Search By: RepBroker V Contains	$\sim$
RepBroker		RepBr Long Description	
□ %		%	
2		?	
300		Nicole Toscano	
301		Patrick Hurley	
302		Mark Fiedler	
303		Michelle Knapp	
304		John Trasky	
<b>⊠</b> 305		Janice Tierney	
306		John Trainor	
307		Guy Nelson	
308		Dean Cizek	
309		Terry Bruno	
312		Mike Hartney	
313		Eleanor Toman	
315		Mary Lopez	
318		Neil MacDonald	
1 to 16 of 16			
Clear All	ОК	Cancel More Help	

Three of the RepBrokers are selected, and OK is clicked in the Select Members window.

The Filters window displays my selections.

			Filters			×
Levels	Data	Axis				
Ship-To Territory	: 1102 - Gul	f Coast, 1103 - Mi	idlantic, 1106 - Great Plains, 1111 - Eastern Atlanti	T	×	
Ship-To Territory	S No filter ex	ists		T	×	
Product:	No filter ex	ists		T	×	
Product Brand:	No filter ex	ists		T	×	
Product Categor	y: No filter ex	ists		T	×	
Product Family:	No filter ex	ists		T	×	
RepBroker:	300 - Nicol	e Toscano, 305	Janice Tierney, 312 - Mike Hartney	T	×	)
			ОК		Cancel	

I click OK in that window. The window closes and the refreshed view has RepBroker in the View Filter section. The view is filtered by the three RepBrokers that I selected for the level.

		1	RepB	oker	Sales	s Acł	niever	nent	Percen	tage					
	a I I		90		123		2	Show J	AII 800	9 1 to	<b>30 of 3</b>	111	0000	) 1 to 3	) of 30
Rows: Product: /	<u>411 × &gt; :</u>	Produc	t Brand ×	Produ	ct Categ	ory ×	Produ	ct Famil	y× ·	+					
Columns: IShip-To T	erritory: Fil	tered ×	> II Ship	-To Terri	tory Sale	s Mngr	×	+							
View Filter: II <b>T Rep</b>	Broker: M	ultiple >	< +	)											
Ship-To Territory	<u>1102</u>						<u>1103</u>						<u>1106</u>		
STerr Long Description	Gulf Coast						Midlantic						Great Plains		
Product	Actual Sales Amount Q1 2017 to Q3 2017		Achievemen Percentage Sales vs Budget Amount Q1 2017 to Q3 2017		Actual Sales Return Amount Q1 2017 to Q3 2017	Sales Return Units Q1	Actual Sales Amount Q1 2017 to Q3 2017		Achievement Percentage Sales vs Budget Amount Q1 2017 to Q3 2017	Average Selling Price Q1 2017 to Q3 2017	Sales	Units Q1	Actual Sales Amount Q1 2017 to Q3 2017		Achieven Percenta Sales v Budge Amour Q1 2017 Q3 201
Pear Hivs LS 12 oz BR* 0A			▷ 0%						▷ 0%						$\triangleright$
Peach Hlvs HS 12 oz BR* 0A			▷ 0%	b			\$1,855	\$1,144	▲ 162%	\$44.81	(\$362)	(8)			$\triangleright$
Applesauce 12oz BR* 0A	\$1,080	\$666	▲ 162%	\$43.48	(\$477)	(11)	\$3,354	\$2,068	▲ 162%	\$43.40	(\$466)	(11)	\$4,387	\$2,705	▲ 1
FrtCktail HS 12 oz BR* 0A			▷ 0%	5			\$17,004	\$10,484	▲ 162%	\$44.01	(\$849)	(19)			$\triangleright$
Pear Sics LS 12 oz BR* 0A			▷ 0%						▷ 0%						$\triangleright$
Peach Hivs LS 12 oz BR* 0A			▷ 0%				\$9,295	\$5,731	▲ 162%	\$44.31	(\$622)	(14)	\$9,847	\$6,071	▲ 1
Peach Sics LS 16 oz BR* 0A			▷ 0%				\$3,198	\$1,972	▲ 162%	\$55.17	(\$451)	(8)	\$3,194	\$1,969	1
Pear 6oz LnchPk LS 0A			▷ 0%	b					▷ 0%				\$20,983	\$12,937	▲ 1
Mand Org Pcs 12oz BR* 0A			▷ 0%				\$3,081	\$1,900	▲ 162%	\$50.74	(\$719)	(14)			$\triangleright$
Escalloped Apples 12 oz BR* 0A			▷ 0%	b			\$6,868	\$4,235	▲ 162%	\$62.21	(\$675)	(11)	\$11,717	\$7,224	▲ 1
			►				•···•							• • • • • •	*

# Why Doesn't a Level for a View Show in the Filters Window?

The Filters window only displays levels in a view that have their Visible property set to Yes. A level will not display in the window if it is defined as hidden (Visible = No). In the following example, three of the levels in the view are hidden including the Region level. The Filters window will display the five levels that are defined as visible, listing the levels that are on columns first followed by the levels on rows.

View Explorer	د	×								
⊗⊝×										
	псссг огоарз									
> 📕 🔲 Grid										
> 👘 🗆 t	Rows									
~ 12,	Customer Ship-To									
~ 12,	Customer Sold-To									
~ 12,										
~ 12,	Product									
> 퉬 🗆 d	> 🍑 🗆 Columns									
~ 12,	Buyer									
> t <u>2</u> , (										
>	Region									
	😭 🗆 Rgn Long Description									
~ 12,	Ship-To Territory	1								
~ 14,	RepBroker									
🍌 🗆 🗤	/iew Filter	•								
Properties - Region	n >	×								
Name:	Region									
Caption Expression:	[Name]									
Filter:	Filter: None .									
Sort:	Sort: None									
Total:	Total: Yes									
All Others:	All Others: No									
Visible:	No	•								

			Filters		×
Levels	Data	Axis			
Buyer:	No filter ex	ists		T	×
Ship-To Territory	: No filter ex	ists		T	×
Customer Ship-T	o: 101100ACT	"H - Wilder Foods	Quebec QC THA, 101100ADMC - Wilder Foods	T	×
UPC Global Num	nber: <i>No filter ex</i>	ists		T	×
Product:	No filter ex	ists		T	×
			ОК		Cancel

# Why is a Filter Property Disabled?

This can happen when:

- You're a casual user.
- You're working with a cumulative calculated measure item.
- You're working with measure items and there are levels on the same axis as level items.
- You are trying to filter Grand Totals that are on the axis opposite from the measure item axis. See <u>Guidelines for Sorting and Filtering on Totals</u>.

#### **Casual User**

The grid pop-up menu for casual users does not have a Filter option on it. Casual users can however use the Filters window from the view toolbar to add filters or change existing ones. And they can edit existing filters by clicking the filter icon  $\Upsilon$  next to a filtered item in a view.

#### **Cumulative Calculated Measure Item**

Filtering is not permitted on calculated measure items that use cumulative functions in their expression. Those functions are the Cumulative Total, Cumulative Percent of Total, ABC Cumulative, and ABC Cumulative Percent of Total functions. The Filter option will not display on the grid pop-up menu of a calculated measure item that uses a cumulative function. Also, the Filter properties will always be disabled in the Properties window for those measure items.

III + View Name: <i>Cum</i> ↓ → View Filter	ulative Current Week Sales Units	View Explorer	×
Product Family Frozen Entrée	Amount Sales Units	Cumulative Current Wk Sales Units 65,445	^
Frozen Individual Dinner Tender Vegetables Hardy Vegetables	Select All Insert Edit	131,606         Columns           276,070         View Filter           388,467         Measure Items	
Fruit Fillings Applesauce Frozen Juice Specialty Canned Fruit	Remove Hide	573,263     Image: Current Wk Sales Amount       716,529     Image: Current Wk Sales Units       762,111     Image: Current Wk Sales Units       879,925     Precentation	~
Fruit Cocktail Peaches Pears	Conditional Format	1,051,458 1,295,223 Properties - Cumulative Current Wk Sales Units	×
Pineapple Fresh Pork Fresh Beef	View Explorer Properties \$5,188,822 77,286 \$4,608,416 76,236	1,557,639         Pop-up Expression         No            1,634,925         Hyperlink         No            1,711,161         Minible         Yes	-
Tender Fruits Hardy Fruits Grand Total	\$5,994,606 93,073 \$5,090,158 130,728 \$108,960,090 1,934,962	1,804,234 1,934,962 Sort None	

### Levels on Same Axis as Measure Items

If there are levels on the same axis as the measure items, then Filter will be disabled in measure item Properties windows. You must first filter the measure item via the grid in relation to a particular level member on the measure item axis.

In this view, the measure items are on the columns axis and there is an ABC Classification Code level on columns. The Filter property is disabled in all measure item Properties windows. You can filter by right-clicking an instance of a measure item in the grid (for A, B, or C code) and using the Filter option on the pop-up menu.

After setting up the initial filter that way, the Filter properties will be enabled in the Properties window. You can then edit or remove the filter from the grid or Properties window.

<ul> <li>+ View Name: Cum</li> <li>→ View Filter</li> </ul>	nauve cu	rem we	ex sales U					View Explorer
ABC Classification Code >>	A			в			с	Parameter Groups     Grid
ABC Long Description	А			В			С	Rows
Product Family	Current Wk Sales Amount	Current Wk Sales Units	Cumulative Current Wk Sales Units	Current Wk Sales Amount	Current Wk Sales Units	Cumulative Current Wk Sales Units	Curr Wk Si Amoi	<ul> <li>Columns</li> <li>View Filter</li> <li>Measure Items</li> </ul>
Copy Select All Occurren Select All	ices 2	65,445	65,445	\$6,081,129		66,161		Image: Current Wk Sales Amount           Image: Current Wk Sales Units
e Insert Edit Remove Hide Sort Filter Conditional Formal Actions Transpose	→ B 7	98,896 33,145 121,818	319,304	\$1,353,435 \$1,108,667	33,622 18,794	99,783 118,578	\$3,52: \$2,62: \$1,91!	Cumulative Current Wk Sales Units Presentation Properties - Current Wk Sales Amount
e Hide		143,266 45,520	462,570	\$3,560,773	55 165	173,743	\$3,19: \$84:	Type Regular 🗸
Sort Filter		Edit	,,	\$9,576,214 \$11,610,331	171,533	345,276	φ <b>υ</b> η	Measure         Actual Sales Sales Amount            Format String         As Is         V
Conditional Format Actions Transpose	: )- 	Clear	All 4	\$6,399,563 \$5,874,239 \$1,745,899	124,515		\$3,44;	Value Yes 🗸
v View Explorer Properties	þ	25,103	592,797	\$4,134,790		817,119	\$3,44. \$2,47( \$1,85)	Conditional Format     No        Pop-up Expression     No        Hyperlink     No
ardy Fruits Grand Total	\$32,541,383	592,797		\$2,319,203 \$53,964,245	-		\$2,570 \$22,45	Visible Yes V
								Sort None

# Definitions

## **Axis Filter**

Axis filters are a means of creating complex filters that contain more than one condition in their filter expression, joined by "and" or "or" statements. They are well suited for analysis that takes into account multiple business conditions. Use them when you need to set up filters involving multiple measure items or both measure items and attribute relationships. For example, you have a business need to see all rows of data for products that meet a certain sales goal but you also want to factor in another performance indicator such as a profit margin, rate of return, or average selling price. You use an axis filter with multiple conditions to zero in on the products of interest to you.

You can set up axis filters on the rows or columns axis. For example, use an axis filter to return all rows that fit the criteria of two different measure items -- such as all rows where Sales Units are greater than 1,000 and Profit Margin is less than 20%.

# **Display Column**

Display columns provide descriptive information about objects displayed in Stratum.Viewer windows such as the View List and <u>Select User List Filter windows</u>. The display columns available vary by window and object type. Examples of display columns are the date a user list was created, an attribute relationship for a level member, and the owner of a view. You can determine which display columns show while using the <u>Select Members</u>, <u>Advanced</u> <u>Select Members</u>, User List, Member List, and Conditional Format windows.

## **View Filter**

The View Filter acts as a filter on all visible levels and measure items in a view so that only data that meets View Filter criteria displays. A View Filter is applied no matter what levels are displayed in the view. See also <u>Using a View Filter vs. a Level Filter</u>.