Working with Parameters
Stratum.Viewer 7

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Getting Started

Access to Parameters

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

User Profile Level	Add	Edit	Delete	Run Views with Parameters
Casual	✖	✖	✖	✔
Advanced	✔	✔	✔	✔
View Administrator	✔	✔	✔	✔
Security Administrator	✔	✔	✔	✔

Introduction to Parameters

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

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

- **Select Members** - users will click a filter icon, which opens the Select or Advanced Select Members window. They can search for and select one or more members to include or exclude from the view.
- **User List** - users will click a filter icon, which opens the Select User List Filter window. They can choose a user list for filtering a level.
- **Drop Down** - users will select a member from a drop-down list.
- **Expression** - users will click a filter icon to open the Expression window. They can set up an expression to determine filter criteria for a level.

All four types of parameters have an option of Include or Exclude. The "Include" option means the applied parameter filter returns only the members specified by the filter selections/criteria. "Exclude" means the applied parameter filter returns all members *except* the ones specified by the filter selections/criteria.

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

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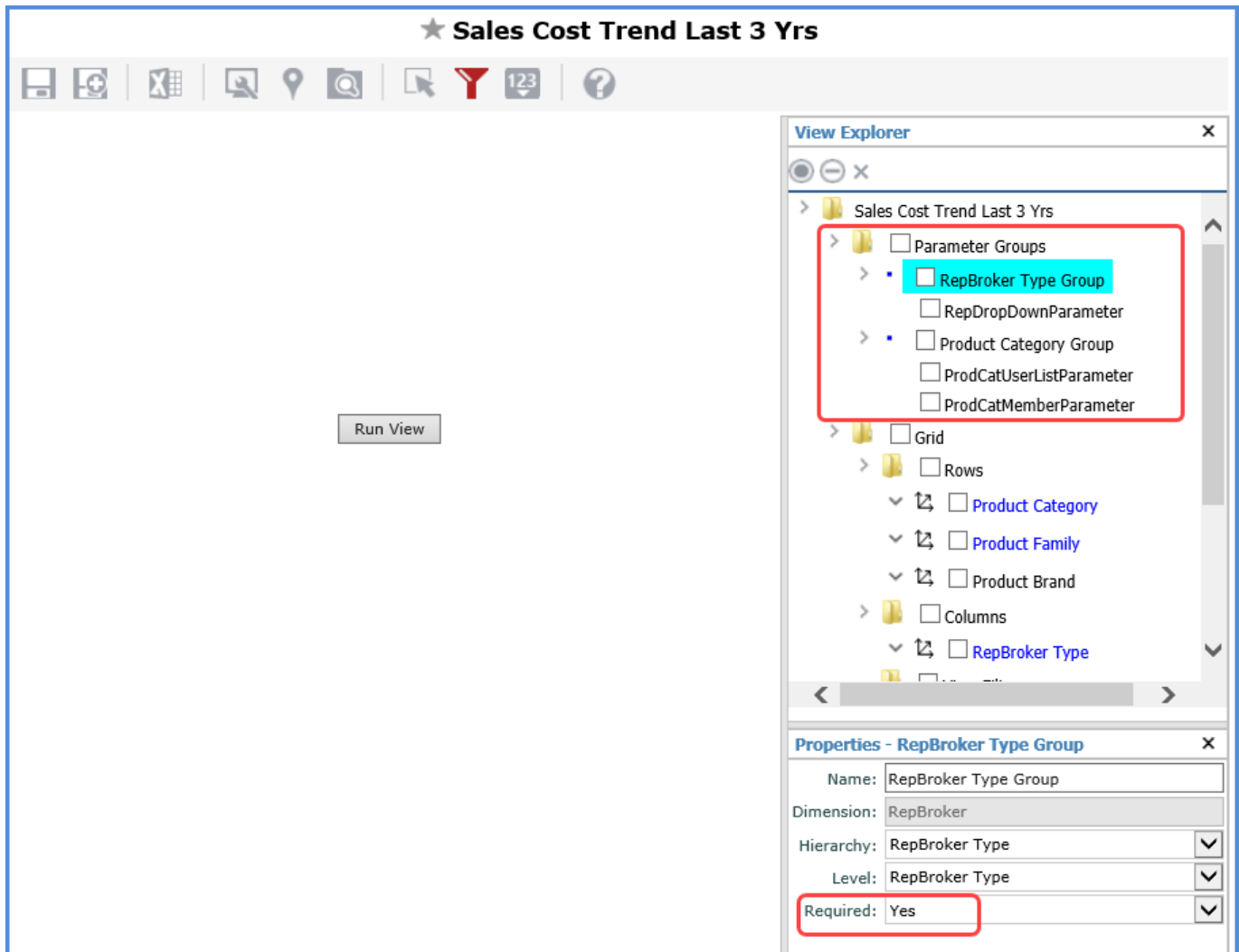
Here is the View Prompt window that displays when a user runs the view.

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

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

⭐ **Sales Cost Trend Last 3 Yrs**

Rows: ⋮ Product Category: All ✕ 〉 ⋮ Product Family: All ✕ 〉 ⋮ Product Brand ✕ ＋

Columns: ⋮ RepBroker Type: Filtered ✕ ＋

Filtered With Members: Direct

View Filter: ＋

|		Direct			
Product Category	**Product Family**	Sales Units Last 3 Yrs	Sales Freight Cost Last 3 Yrs	Sales Ext Handling Cost Last 3 Yrs	Daily Sales Last 3 Yrs
Fresh Vegetables	Tender Vegetables	14,640,240	$10,696,648	$235,093,794	154,929
	Hardy Vegetables	11,232,358	$6,951,462	$98,572,273	102,730
	Fresh Vegetables Total	**25,872,598**	**$17,648,110**	**$333,666,067**	**257,660**
Canned Fruit	Fruit Fillings	27,156,554	$55,795,092	$286,749,281	241,760
	Applesauce	19,357,621	$42,657,865	$251,323,027	146,305
	Specialty Canned Fruit	17,203,965	$45,624,928	$171,301,013	135,753
	Fruit Cocktail	27,389,074	$64,739,980	$319,058,190	182,059
	Peaches	34,494,637	$83,224,308	$343,899,364	282,172
	Pears	17,569,863	$43,009,451	$196,259,411	123,278
	Pineapple	23,788,200	$47,076,637	$250,173,500	151,887
	Canned Fruit Total	**166,959,915**	**$382,128,259**	**$1,818,763,787**	**1,263,214**
Pork	Fresh Pork	7,703,404	$7,161,634	$137,069,004	84,504

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Quick Start - Adding Parameters

Here are the key steps for adding parameters. You need to set up a parameter group and then add parameters to it.
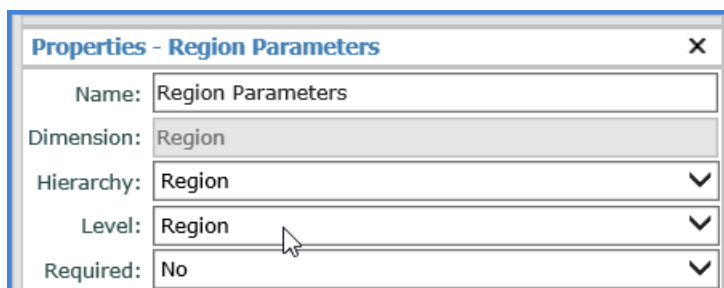
**1**　**Right-click the Parameter Groups folder in view explorer and click Add.**
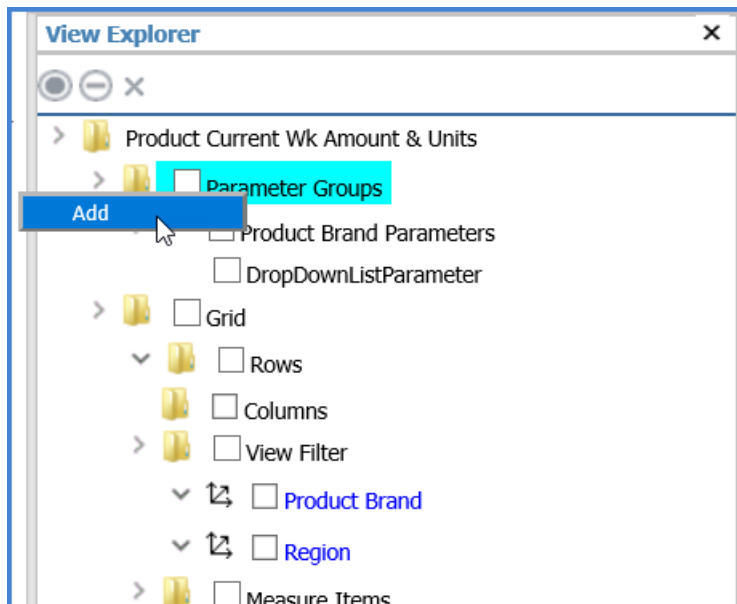
2　**Set up the parameter group properties.**

Properties to set up include the group name, what level to use for the group, and specifying whether users will be required to use a parameter from this group when they run the view and are presented with the View Prompt window.

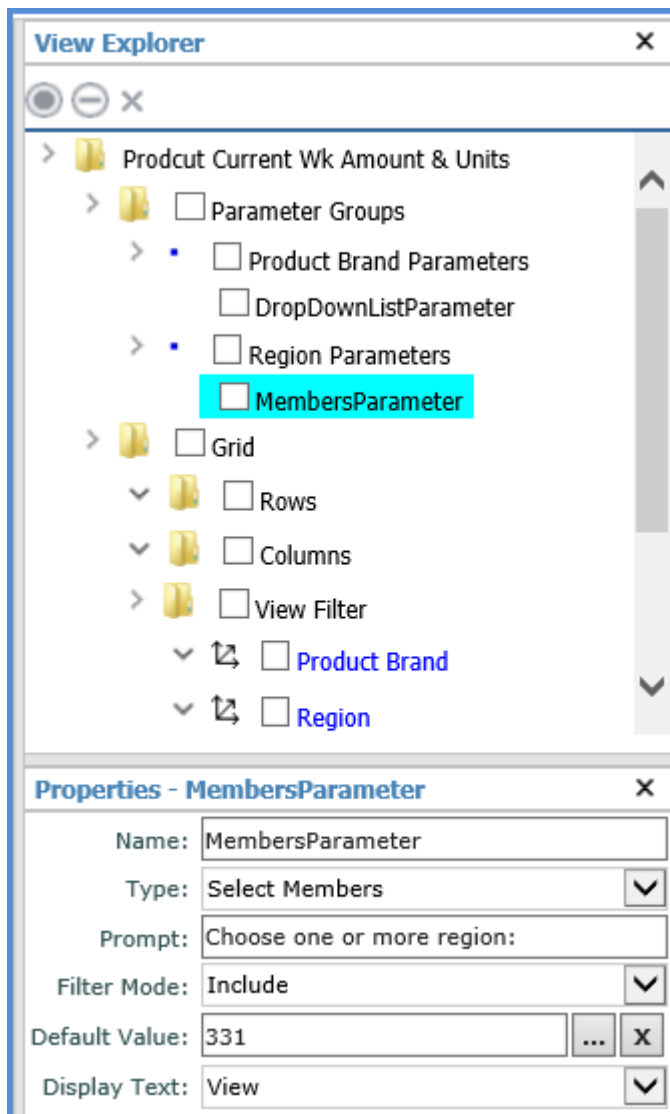**③ Right-click the parameter group name, and select Add.**
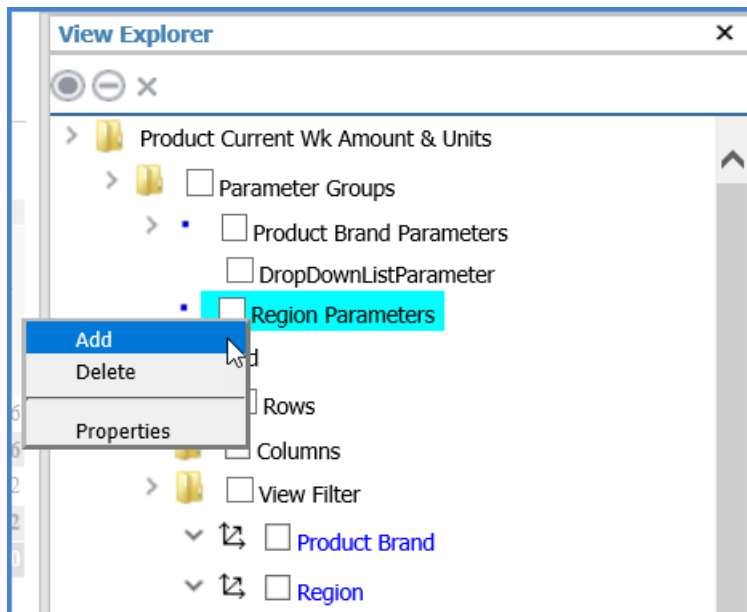
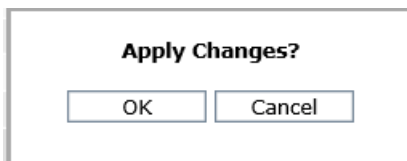**④ Set up the properties for the parameter.**

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

View Explorer ✕

◉ ⊖ ✕

> 📁 Prodcut Current Wk Amount & Units
  > 📁 ☐ Parameter Groups
    > ▪ ☐ Product Brand Parameters
         ☐ DropDownListParameter
    > ▪ ☐ Region Parameters
         ☐ **MembersParameter**
  > 📁 ☐ Grid
    ⌄ 📁 ☐ Rows
    ⌄ 📁 ☐ Columns
    > 📁 ☐ View Filter
      ⌄ 🔀 ☐ Product Brand
      ⌄ 🔀 ☐ Region

Properties - MembersParameter ✕

Name:	MembersParameter
Type:	Select Members ⌄
Prompt:	Choose one or more region:
Filter Mode:	Include ⌄
Default Value:	331 [...] [X]
Display Text:	View ⌄

⑤ **Repeat Steps 3 and 4 if you want to add additional types of parameters to the group, then apply all your additions using the Apply Changes prompt.**

Apply Changes?

[OK] [Cancel]

Tasks

Add a Parameter

1. If you haven't done so already, add a parameter group to which the parameter will belong.

2. Right-click the parameter group, and click Add.

3. Enter a name for the parameter in the properties window that displays.

4. Select a parameter type, either Select Members, User List, Drop Down, or Expression.

5. Enter a text prompt that instructs the user what to do with the parameter. For example, you could enter text such as *Choose a user list:* for a user list parameter.

6. Choose a Filter Mode. The "Include" option means the applied parameter filter returns only the members specified by your filter selections/criteria. "Exclude" means the applied parameter filter returns all members *except* the ones specified by your filter selections/criteria.

7. {Optional} Customize the Display Text property for the parameter. See How Parameter Display Text Interacts with Other Settings for more details and examples.

   - **View** – This is the default Display Text selection for all parameter types. Setting this to view means that you want the applicable drop-down list or Select/Advanced Select Members windows for the parameter to display based on the display text setting for the associated level in the view.
   - **Value or Attribute Relationship** – Setting the Display Text to a specific attribute (either value or attribute relationship) means that you want the applicable drop-down list or Select/Advanced Select Member windows for the parameter to display using the selected attribute.

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

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

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

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

Add a Parameter Group

1. Right-click the Parameter Groups folder in view explorer, and select Add.

2. Enter a name for the group in the properties window that displays.

3. Select the hierarchy and then level for the group.

4. Use the Required property to determine if users will be required to specify a parameter for the group when they run the view and are presented with the View Prompt window.

   - Yes will require a parameter to be specified.

- No will allow users to bypass specifying a parameter for the group.

5. You can now add one or more parameters to the group. See Add a Parameter.

Delete a Parameter Group or Parameter

1. In view explorer, select the checkbox for each parameter group or parameter you need to delete.

2. Click the Delete Items icon ✕ at the top of view explorer.

Edit a Parameter

1. In view explorer, navigate to the parameter group for the parameter.

2. Right-click the parameter, and select Properties.

3. Change properties such as the name, prompt, filter mode, or default value in the properties window.

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

Edit a Parameter Group

1. Right-click the parameter group in view explorer, and select Properties.

2. Change properties in the properties window that displays.

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

Edit the Order of Parameter Groups or Parameters

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

Run a View with Parameters

A View Prompt window displays when you run a view that has parameters:

1. Select a parameter for a parameter group.

2. Choose a value(s) using the provided drop-down list or filter icon and determine if the filter mode for the parameter will be Include or Exclude.

   - "Include" means the applied parameter filter returns only the members specified by your filter selections/criteria. "Exclude" means the applied parameter filter returns all members *except* the ones specified by your filter selections/criteria.
   - There will be a drop-down list for Drop Down parameters. Select a member.
   - There will be a filter icon for other parameter types:
     - **Select Members** - icon opens the Select or Advanced Select Members window. Search for and select one or more members then click OK.
     - **User List** - icon opens the Select User List Filter window. Use the search or filter ▼ tools as aids in finding a list. Optionally click Show Details ⌃ after selecting a list to see more information about it before applying it as a filter. Click OK.
     - **Expression** - icon opens the Expression window. Set up an expression and click OK.

3. The selected value(s) will display in the parameter field.

4. Repeat Steps 1 and 2 for any additional parameters groups that display in the window.

5. If there is a Presentation section in the View Prompt window, select the type of format to run view results in -- either Viewer or Excel.

6. Click OK.

OR

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

Advanced Select Members Window

1	Use the search properties to specify the criteria and the parameters by which to search for members to be used in the member list. That list can be used as a level filter, to create a user list, or to help build an expression.
	Note: The window also is used when administrators set up roles.
	Click the search icon 🔍 after you specify your search properties:

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

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

2

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

Other options and tips:

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

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

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

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

3

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

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

Other options and tips:

- Use the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).
- Click Clear All to clear all of the members, from all pages of the selected list.

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

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

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

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

- **Change Filter Type** –Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).

- **Clear Filter** – Click as a shortcut to clearing the filter from the level.

- **Basic Select** – Click to access the Select Members window. This option may not display depending on administrative settings for the level. Administrators determine which version(s) of the window are available by dimension.

- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Advanced Select Members window.

- **Paste** – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building. Valid values identified in the Paste Members window will display in the bottom half of the Advanced Select Members window when you are done identifying members for your filter via the Paste Members window.

Properties Windows for Parameter Groups and Parameters

Parameter Groups

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

Parameters

1	**Name** – Use to customize the name of a parameter. Each parameter across all parameter groups for the view requires a unique name. Don't use any spaces in the name.
	Type - Select the type of parameter. You can create up to four parameters per parameter group, one of each type.
	• **Select Members** - this type creates a filter icon in the View Prompt window. The user can click it to access the Select or Advanced Select Members window. They can search for and select multiple members as the parameter value.
	• **Drop Down** - this type creates a drop-down list in the View Prompt window. The user can select one member as the parameter value.
	• **User List** - this type creates a filter icon in the View Prompt window. The user can click it to access the Select User List Filter window and select a user list as the parameter value.
	• **Expression** - this type creates a filter icon in the View Prompt window. The user can click it to access the Expression window and set up an expression for the parameter value.
2	**Prompt** - Enter a text prompt that instructs the user what to do with the parameter. The prompt will display next to the parameter's radio button in the View Prompt window. For example, you could enter text such as *Choose a user list:* for a user list parameter.
	Note: In order to activate a parameter and have it display in the View Prompt window, you need to enter a prompt. If you don't enter a prompt, you are required to specify a default value.
3	**Filter Mode -** This property controls how Viewer treats the parameter filter. A parameter set to "Include" means the applied parameter filter will return only the members specified by your filter selections/criteria. A parameter set to "Exclude" means the applied parameter filter will return all members *except* the ones specified by your filter selections/criteria.
	Default Value - You have the option of specifying a default value for each parameter. The value displays in the View Prompt window where the user can either accept it or override it by choosing a different parameter value.
	• Click the Browse button [...] to set up a default. The window that opens depends on the type of parameter. For example, the Select or Advanced Select Members window opens for a Select Members parameter.
	• Click the "X" button to remove a default value from the parameter.
4	

Display Text – You have the option of customizing the Display Text property for the parameter. See How Parameter Display Text Interacts with Other Settings for more details and examples.

- **View** – This is the default Display Text selection for all parameter types. Setting this to view means that you want the applicable drop-down list or Select/Advanced Select Members windows for the parameter to display based on the display text setting for the associated level in the view.
- **Value or Attribute Relationship** – Setting the Display Text to a specific attribute (either value or attribute relationship) means that you want the applicable drop-down list or Select/Advanced Select Member windows for the parameter to display using the selected attribute.

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

Properties Window for Presentation

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

Select Members Window

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

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

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

Click the search icon 🔍 after you specify your search properties:

- Enter a value in the search field. Multiple values can be entered by separating them with a semicolon. If the field is left blank, the available list displays all members for the active level.

- Optionally use the Search By drop-down lists. The first list is to select the attribute relationship to perform the search on. The other list lets you choose whether you want your search to contain, not contain, start with, be equal to, not equal to, greater than, or less than the value(s) specified in the search.

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

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

Other options and tips:

- If your search returns only one member, the member will display as selected. At that point, you can click the OK button to close the window and add that member to a filter.

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

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

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

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

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

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

④

- **Change Filter Type** –Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).

- **Clear Filter** – Click as a shortcut to clearing the filter from the level.

- **Advanced Select** – Click to access the Advanced Select Members window if you prefer to use that advanced version of the window to search for, select, or clear. The advanced window is helpful when working with levels for which a large amount of members exist.

- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Select Members window.

- **Paste** – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building. Valid values identified in the Paste Members window will get selected in the Select Members window when you are done identifying members for your filter via the Paste Members window.

Change Filter Type
Clear Filter
Advanced Select
Display Options
Paste

More...
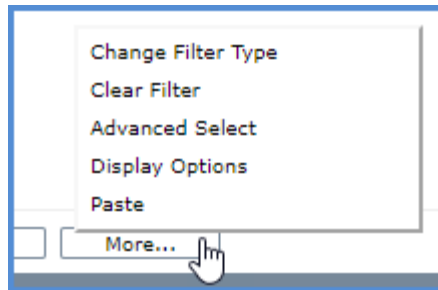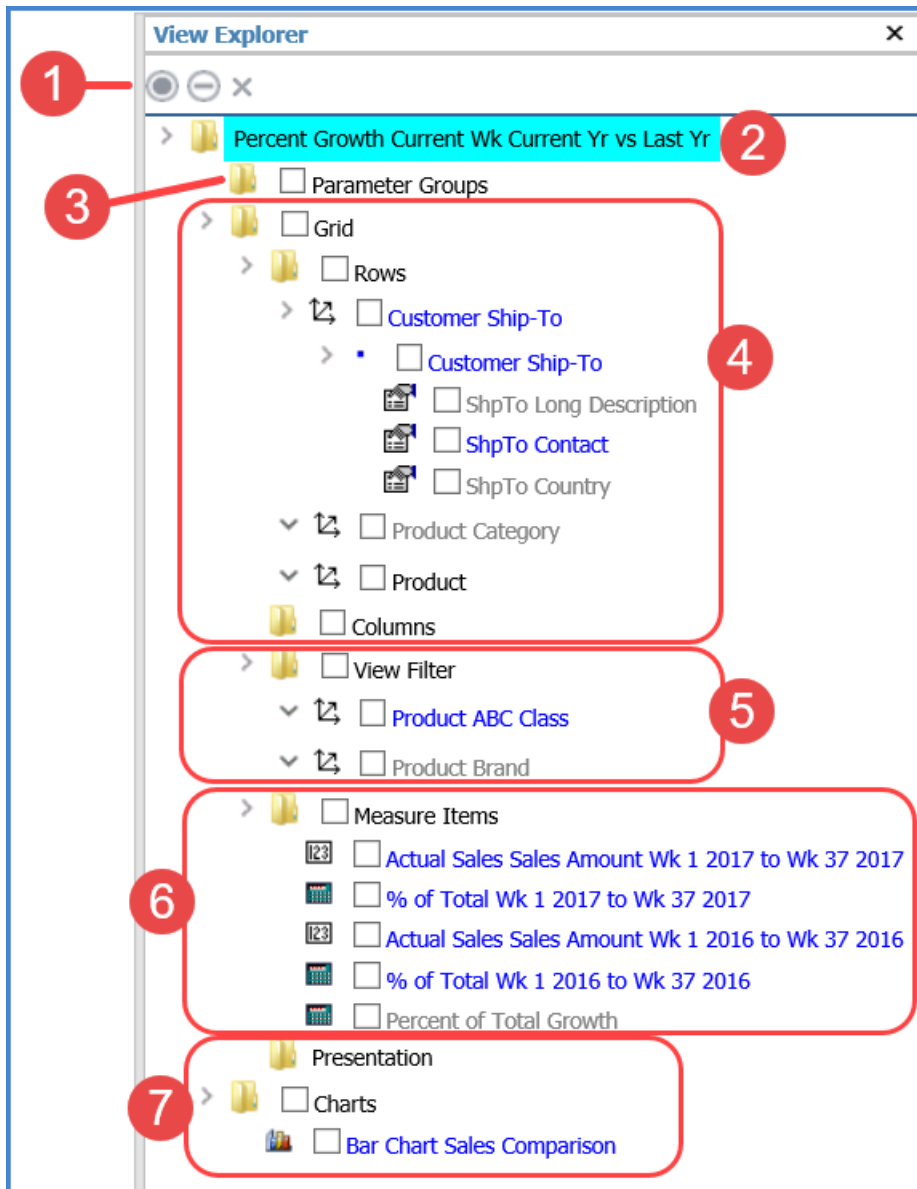
View Explorer

The elements in view explorer are organized into a tree structure that has expandable/collapsible folders and checkboxes for selecting items. Folders are described in the following table. Color-coding is used throughout to help you distinguish which items will be visible in the grid and which are hidden.
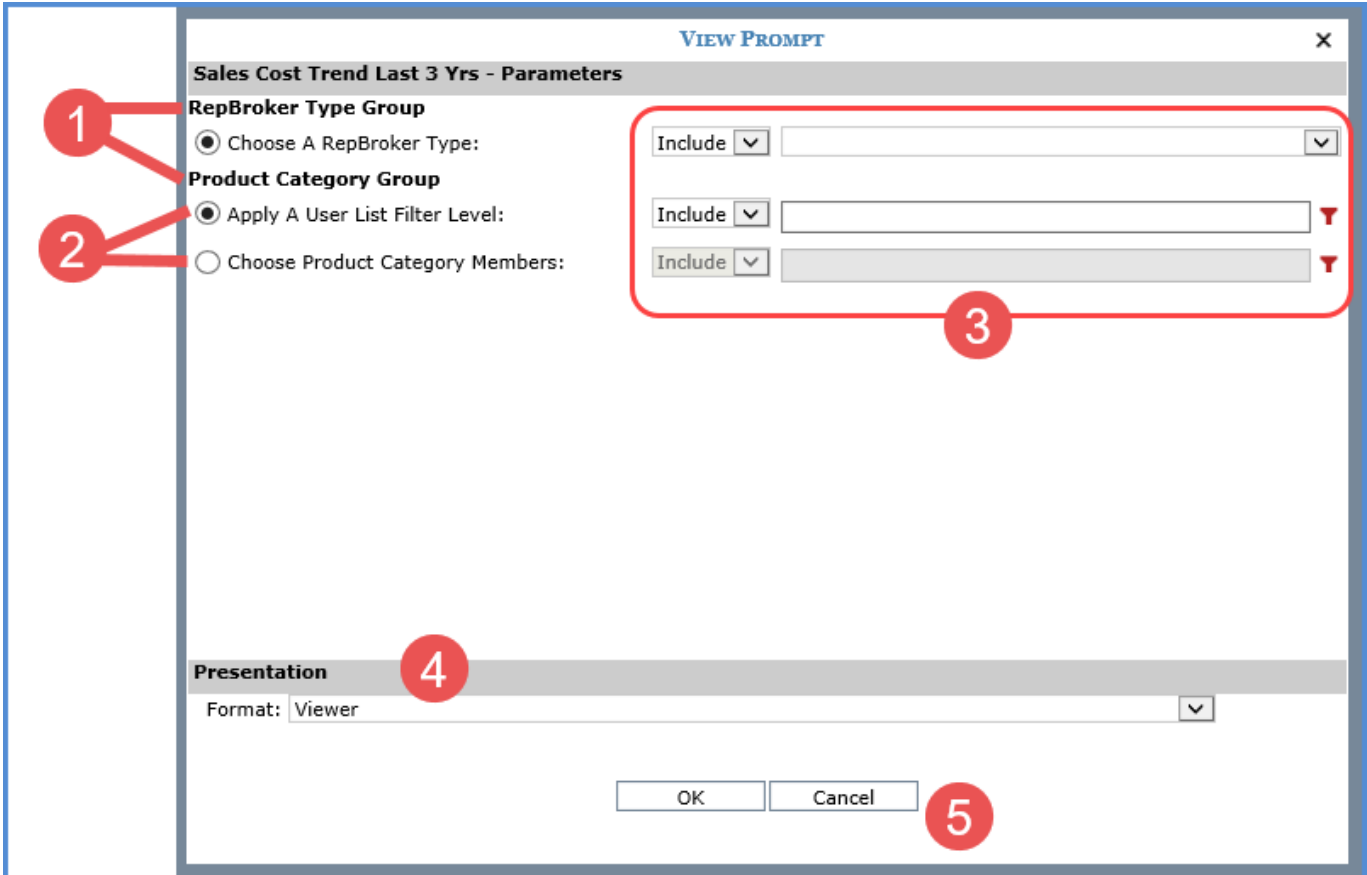
- **Items in blue text** – Any items currently showing in the grid. Their Visible property is "Yes" in their Properties window.

- **Items in black text** – Any items that are not actively shown in the grid, but that have a Visible property of "Yes." This means they will display in the Navigation Panel as available to drill to and display in the grid once you reach them in the drill down path for the view.

- **Items in grey text** – Any items that have a Visible property of "No." For levels, this means they will not display in the grid as you drill through it. Attribute relationships, measure items, and charts displayed in grey text also will not display in the grid.

- **Checkboxes for folders and items –** Select items using their checkboxes then use the icons in the view explorer toolbar as shortcuts for showing, hiding, or deleting items. You can select multiple items to apply those types of changes to at once.

- **Properties windows available for all items** – When you double-click an item in view explorer, the Properties window of the active item opens at the bottom of view explorer. You also can right-click to invoke a pop-up menu of actions to take on items from view explorer.

1	**View Explorer toolbar –** Icons in the toolbar are shortcuts for hiding, displaying, or deleting items for the view. Select checkboxes for all the items you want to work with and then click the applicable icon:
	
	   • ◉ – Makes the selected items visible or available in the view to drill to in the view.
	
	   • ⊖ – Hides the selected items from displaying in the view.
	
	   • ✕ – Deletes the selected items from the view.
	
	Remember to click OK in the Apply Changes prompt to refresh the view with all the changes you've made in view explorer.

2	**View name folder** – displays the name of the view. Double-click to access the Properties window for editing basic properties like the Name, Type, Planning, Export Type, and View Group properties. Administrators can use the Owner property to change the owner of a view.
3	**Parameter Groups folder** – Displays a view's parameter groups and parameters within each group. Selecting the checkbox for this folder is a shortcut to selecting all groups within the folder, and selecting the checkbox for a group is a shortcut to selecting all parameters in the group. As you insert groups and parameters, they will display under this folder. Each group and parameter has a related Properties window. You can drag and drop groups and parameters within each group to rearrange them.

4	**Grid folder** – The folders for Rows, Columns, View Filters, and Measure Items are organized under the Grid folder. From the Grid folder, you can access a Grid Properties window which determines if the grid is visible and if paging is enabled for the grid display. Selecting the checkbox for this folder is a shortcut to selecting all items in the view.
	
	Rows and Columns folders – All of the included levels and attribute relationships, grouped by hierarchy, display in their applicable Rows and Columns folders. Selecting the checkbox for a folder is a shortcut to selecting all items in that section. You can move hierarchies along with their levels and attribute relationships between the Rows, Columns, or View Filter by dragging and dropping them within view explorer or into the grid from view explorer. Properties windows exist for hierarchies, levels, and attribute relationships in these folders. Use them to hide or show items, set up filters or sorting, control the display of totals and All Others value defaults, etc.
	
	   • **Hierarchies** ⤢ – This image displays next to the names of hierarchies. Selecting the checkbox for a hierarchy is a shortcut to selecting all levels and attribute relationships associated with that hierarchy.
	
	   • **Levels** ▪ – Blue boxes next to a level indicate the level it is based for all the levels in its hierarchy. For example, a level with one blue box next to it would be the first level for its hierarchy. A level with two blue boxes next to it would be the second level available in its hierarchy, and so forth.
	
	   • **Attribute Relationships** 🗐 – This image displays next to the names of attribute relationships for levels.

5	**View Filter folder –** Levels included in the View Filter show in this folder. Setting up a view filter requires a level to be in the View Filter section and then applying a filter to that level. Drag or drop the desired level(s) into the View Filter section of the grid or into the View Filter folder of view explorer. Selecting the checkbox for this folder is a shortcut for selecting all items in the View Filter.
6	**Measure Items folder** – All measure items defined for this view display in the folder. Selecting the checkbox for this folder is a shortcut tor selecting the checkboxes for all measure items. You can edit, insert, remove and hide measure items. The Time Range controls the type of measure items

	that you can set up for the view – either measure items with time ranges (Yes) or measure items without time ranges (No). You can also use the Properties windows for individual measure items to change their caption, images, conditional formatting, pop-up labels, hyperlinks, filtering, sorting, totals, etc.
	• **Regular Measure Item** 🔢 – This image displays next to regular measure items.
	• **Calculated Measure Item** 📊 – This image displays next to calculated measure items.
	• **Distinct Calculated Measure Item** 📊 – This image displays next to distinct calculated measure Items.
7	**Presentation folder –** The properties for this folder are used to set the default presentation format for the view (either Viewer or Excel) and to determine whether or not users will be prompted to choose the presentation format before the view opens for them.
	Chart folder – The Chart folder displays the names of any charts 📊 that you have created for a view. Selecting the checkbox for this folder is a shortcut to selecting the checkboxes for all charts. Charts displayed in blue are currently visible in the grid. Charts displayed in grey are hidden. Charts can be dragged and dropped in the folder to change the order in which they display in the grid.

View Prompt Window

| **1** | **Parameter Groups** - You can distinguish each parameter group that exists for a view by the bold name above each group. In this example, there is a group named "RepBrokerType Group" for the RepBroker Type level, and a group named "Product Category Group" for the Product Category level. Each group has its own set of parameters and one parameter per group can be used to filter its respective level in the view. |

2	**Individual Parameters** - Parameters in each group have their own radio buttons. Select one to activate that parameter and then specify a value for it (see 3 below). If a default value is associated with a parameter, the value will display in the field next to the parameter. You can leave a parameter set to the default or choose a different value.
3	**Specifying Parameter Modes and Values** - Select a parameter's radio button then use the control provided to specify values and determine if the applied filter will Include or Exclude the values specified by the parameter. The View Prompt window will default to the last selected filter selections each time you reopen the window. Running the view again from the Stratum View Pane resets the window to its default values. • A parameter set to "Include" means the applied parameter filter will return only the members specified by your filter selections/criteria. A parameter set to "Exclude" means the applied parameter filter will return all members *except* the ones specified by your filter selections/criteria. • **Drop Down** parameters have a drop-down list. A single member can be selected. • **Member List, User List, and Expression** parameters have a filter icon next to them. Click the icon and use the window that opens to specify the member(s), user list, or expression for the parameter value. You will use the Select or Advanced Select Members window for Member List parameters, Select User List Filter window for User List parameters, and Expression window for Expression parameters. Clicking OK in the filtering window returns the specified member(s), user list, named set, or expression to the parameter's field in the View Prompt window.
4	**Presentation** – This section only displays if you selected the Yes option for the Presentation section's Prompt property. Users can choose to run the view in Viewer (grid) format or as an MS Excel file. If they aren't any parameters defined for the view and Prompt is set to Yes, then the Presentation section will be the only thing that displays in the View Prompt window.
5	**OK and Cancel** - • **OK** - If you specify parameters and click OK, the window closes and the specified parameter values will be applied to filter the view. Filter icons will display next to the filtered levels. You can click OK without specifying any parameters. If none of the parameters are required, the window closes and the view runs without any filtering by parameter. If any of the parameters are required, a prompt will display indicating that you must specify a value for that parameter. • **Cancel** - If you click Cancel, the window closes and the View Definition window displays. You might choose to do this if you decide you want to make edits to the view before running it. Make changes and then access the View Prompt window again to specify parameters and run the view. If the window doesn't open automatically after your editing has been applied to the view, click the Prompt button in the grid toolbar.

Advanced Concepts

How Parameter Display Text Interacts with Other Settings

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

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

- Additional Details about the Property

- Examples of the Property Interacting with Other Settings

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

Additional Details about the Property

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

- **View** – This is the default Display Text selection for all parameter types and has the following impact depending on parameter type:

  - **Drop Down** -- Members in the drop-down selection list of the View Prompt window will display the same as they do for level members in the grid. That means by value if level members in the grid display by value, or by an attribute relationship if level members in the grid display by that attribute relationship.
  - **Select Members** – Select and Advanced Select Members windows opened from the View Prompt window for the parameter will have their display columns default to the values and/or attribute relationships showing in the grid (acting the same as they do when the windows are opened from other areas in the grid such as from level filter icons). The Search By property in the windows will default to the first display column in the grid or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.* Similar behavior occurs for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.
  - **User List** – Display columns in the Select User List Filter window opened from the View Prompt window will default to the values and/or attribute relationships showing in the grid. The first display column will be either the first display column in the grid or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*

- **Value** – This parameter Display Text selection has the following impact, depending on the parameter type:

  - **Drop Down** – Choose this option if you want members in the drop-down selection list of the View Prompt window to display by their values regardless of how level members are displayed in the grid.
  - **Select Members** – The first display column in Select and Advanced Select Members windows opened from the View Prompt window for the parameter will default to value. The Search By property will default to value or an administrator-specified attribute relationship depending on how you administrator has set up Select Members options settings for the level.* Similar behavior occurs if you choose Value for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.
  - **User List** – The first display column in the Select User List Filter window will default to value or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*

- **An attribute relationship** – If a level has attribute relationships available for it in the view, you can choose one of those attribute relationships as the parameter Display Text. If no attribute relationships are available, only View and Value options will be available for Display Text. Choosing an attribute relationship as the parameter Display Text has the following impact depending on the parameter type:

  - **Drop Down –** Choose this option if you want members in the drop-down selection list of the View Prompt window to display by the attribute relationship you selected regardless of how level members are displayed in the grid.
  - **Select Members** – The first display column in Select and Advanced Select Members windows opened from the View Prompt window for the parameter will default to the attribute relationship you selected.

The Search By property will default to that attribute relationship or an administrator-specified attribute relationship depending on how you administrator has set up Select Members options settings for the level.* Similar behavior occurs if you choose an attribute relationship for **Expression parameters** when the Select and Advanced Select Members windows are accessed from its Expression window.

- **User List** – The first display column in the Select User List Filter window will default to the attribute relationship you selected or an administrator-specified attribute relationship depending on how your administrator has set up Select Members options settings for the level.*

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

Examples of the Property Interacting with Other Settings

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

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

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

Example 1, Parameter Display Text = View

In this example, the Display Text property for each parameter is set to View. The administrative Search By setting is set to System Defined for both levels.
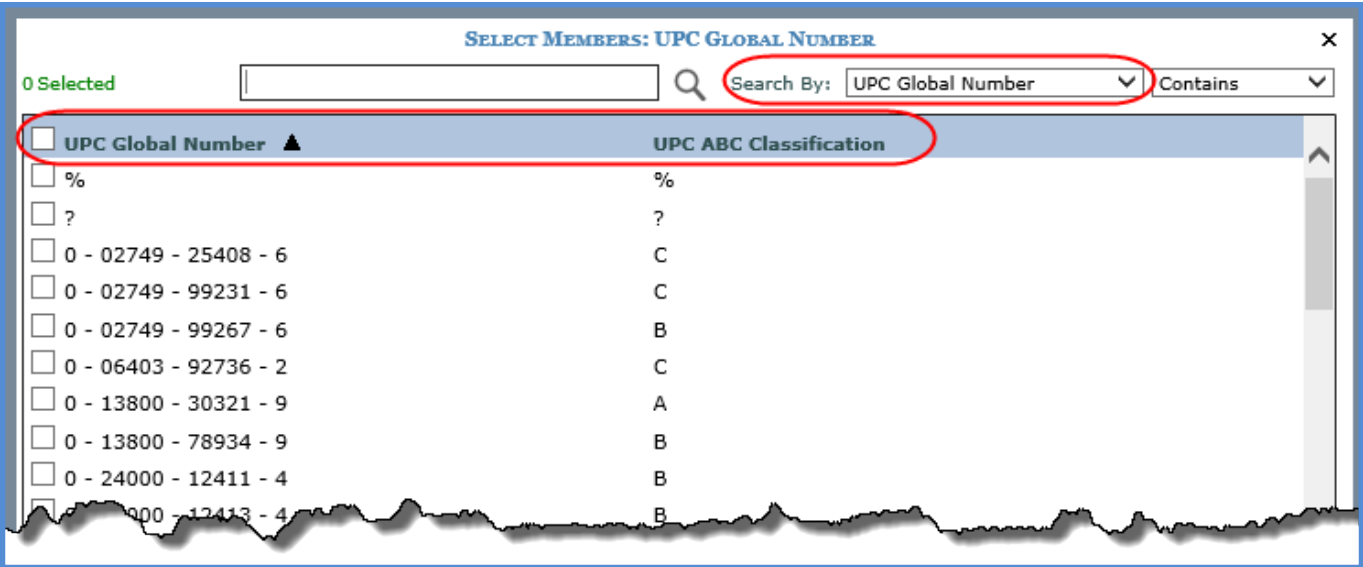
The drop-down list in the View Prompt window for the Ship-To Region parameter displays members by what shows in the grid for Ship-to Region members, in this case the SRgn Short Description.

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

Example 2, Parameter Display Text = Value

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

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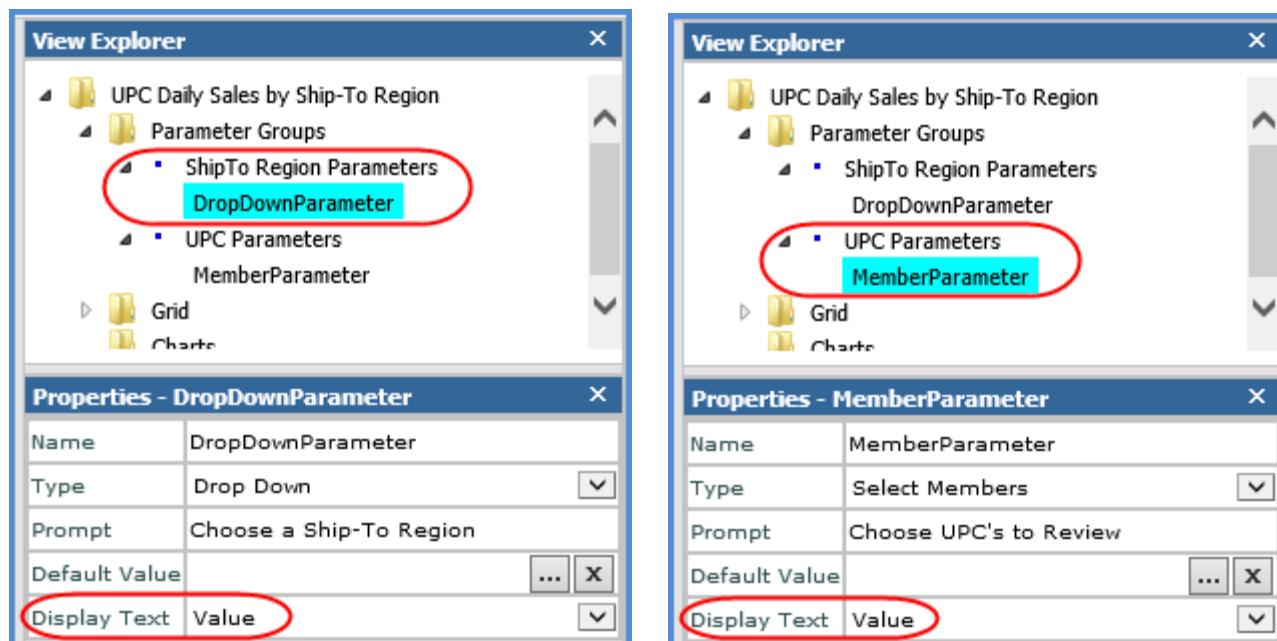

The filtering windows accessed from the View Prompt window for the UPC Global Number parameter will have their Search By default to the UPC Global Number value. The first display column in the filtering windows also will default to the UPC Global Number value. The remaining display columns in the windows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

Example 3, Parameter Display Text = Value

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


The drop-down list in the View Prompt window for the Ship-To Region parameter display members by SRgn Long Description.
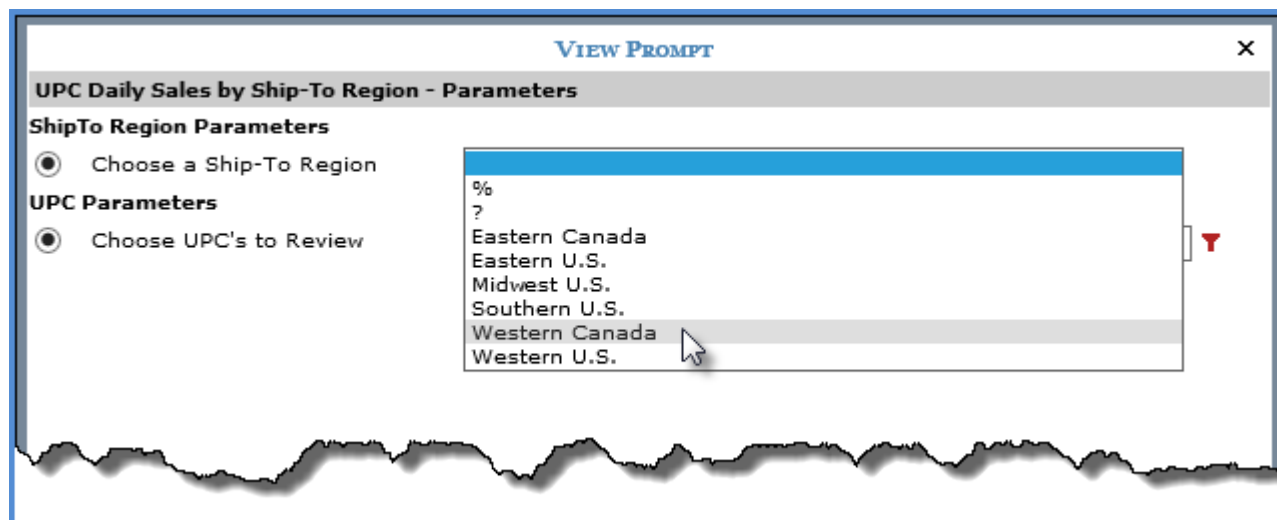
The filtering windows accessed from the View Prompt window for the UPC Global Number parameter will have their Search By default to UPC Long Description. The first display column in the filtering windows also will default to UPC Long Description. The remaining display columns in the windows will be the value (as defined by the parameter Display Text) and any other attributes in the grid other than the level Display Text – which in this case is just UPC ABC Classification.
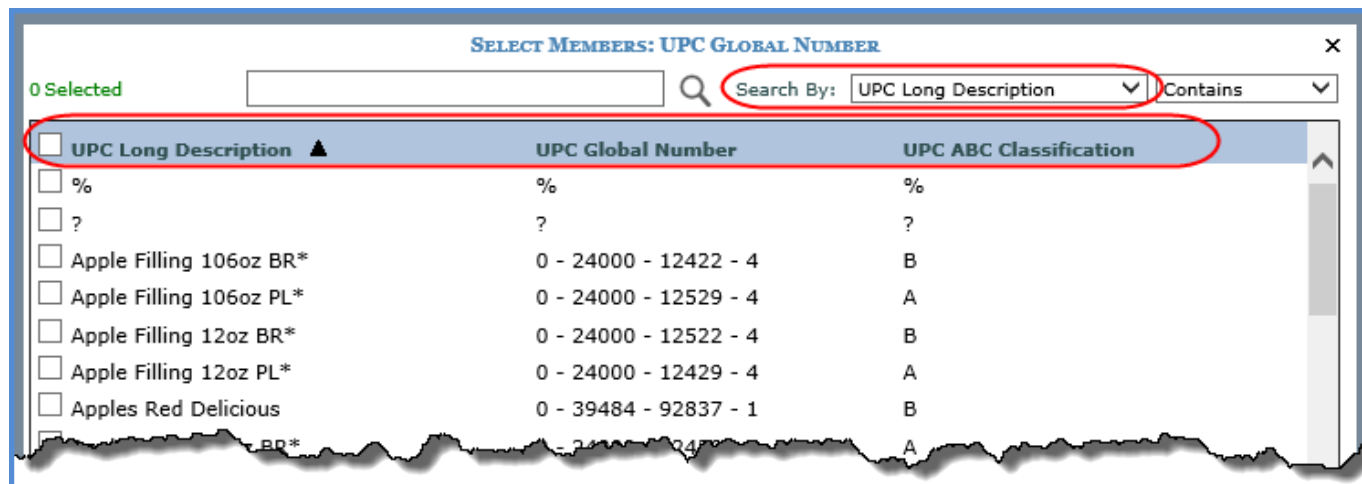
Passing Member Filters Or Stratum Parameter Filters Into Views Via URL's

Stratum.Viewer supports passing member filters and Stratum Parameters as filters to existing views when you use a URL to run the view. This provides integration between other applications and Stratum.Viewer view filtering. The two types of filtering are described below and examples of each are provided.

- **Filtering With Member Filters** – Specify a level and member(s) to filter the view by in the URL that is being set up to run the view. The view you run via the URL does not require the specified filtering level to already be in the view and does not require a pre-defined Stratum Parameter. For example, this URL passes two member values for the Region level to view 941. https://server-xyz:60500/StratumView.aspx?ViewId=941&Region=308;907. Examples and required syntax are shown in the next section of this topic.

- **Filtering With Stratum Parameters** – If your view has Stratum Parameters (these are views that prompt users to pick a filter value before the view runs), you can pass a value for a pre-defined Select Members, Drop Down, User List, or Expression (except for named sets) parameter through the URL. The value(s) will filter the view specified in the URL. For example, the following URL passes the value to a User List parameter. The view has a Stratum Parameter defined named UserListParameter. This URL runs view 472 with a filter for User List Id 13. https://server-xyz:60500/StratumView.aspx?ViewID=472&vp:UserListParameter=13. Examples and required syntax are shown in the next section of this topic.

Example Member Filters In URL's & Required Syntax

If you pass a member filter via a URL, you must include the level name, and level member value(s) for the filter. This info is added onto the URL <u>after</u> the core components marked in red in this example URL. More examples are shown after this syntax table.

https://server-xyz:60500/StratumView.aspx?ViewId=941&Region=308;907

Item	Format & Values	Required?
Level Name and member values	If you want to filter the view for a particular value(s), specify the level name and value(s) for the level(s) that will be used to filter the view. &<Level Name>=<Key Value> Example with one member specified: &Region=300 Example with multiple members specified: &Region=300;400 --- **Note:** A semi-colon is typically used to separate multiple values specified for a single level. See the &D syntax in the next row of this table for more info and alternatives. The specified values for each level in the URL will either be included or excluded from view results based on how the level filter is configured in the view. If the level has an existing filter, that filter's mode of Include or Exclude will be retained. If the level does not have an existing filter, then an Include filter will be added.	Yes
Delimiter that is used between key values URL using a member filter. Syntax **&D**	Defines the delimiter that is used between key values. Choose a delimiter that will not exist in your key values. For example, if your key values typically include a semi-colon, then you will need to choose a different delimiter. Do not use & or = as a delimiter	Only if you are using a delimiter other than the default of ;

Note: See also the topic Syntax For Customizing URL's Used To Share Views for optional syntax that can be added on to control what parts of the view display when it's run via the URL.

Example 1: Member Filter That Passes One Value For One Level

This URL runs a view with ID 941, displays the Stratum View Pane, and passes a member filter for a Customer Ship-To 101106.

https://server-xyz:60500/StratumView.aspx?ViewID=941&svp=1&Customer Ship-To=101106

Example 2: Member Filter That Passes Multiple Values For One Level

This URL runs a view with ID 941. It filters the view with four members for the Product Family level.

https://server-xyz:60500/StratumView.aspx?ViewId=941&Product Family=60;61;62;64

Example 3: Member Filter That Passes Filters for Multiple Levels

This URL runs a view with ID 941. It filters the view with four members for the Product Family level and for Customer Ship-To 101106.

https://server-xyz:60500/StratumView.aspx?ViewId=941&Product Family=60;61;62;64&Customer Ship-To=101106

Example 4: Member Filter With Custom Delimiter That Passes Multiple Values For One Level

This URL runs a view with ID 505. It filters the view with two members for the RepBroker level. The member values are separated by a custom delimiter of * so there is related &D=* syntax included in the URL.

https://server-xyz:60500/StratumView.aspx?ViewId=505&RepBroker=301*302&D=*

Note: If the URL had used the default delimiter of ; then the URL would look like this instead https://server-xyz:60500/StratumView.aspx?ViewId=505&RepBroker=301;302. It would return the same results.

⭐ **Sales & Growth By Region**

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Rows: ⁝ RepBroker: Filtered × | ⁝ Division: All × | ⁝ Product Brand: All × Drill Down view +
⁝ Region: All × +
Columns:
View Filter: +

					Region	East					West		
▼ RepBroker	RepBr Long Description	Division	Product Brand		PBrnd Long Description	Sales Amt Wk 1 to Wk 38 2020	% of Total CY	Sales Amt Wk 1 to Wk 38 2019	% of Total LY	Percent of Total Growth	Sales Amt Wk 1 to Wk 38 2020	% of Total CY	V
302	Mark Fiedler	Grocery Division	009		Farm Fresh	$69,871,050	16.84%	$66,652,199	17.02%	-.182%	$10,503,923	7.32%	
			010		Prime Grown	$34,242,365	8.25%	$30,382,649	7.76%	.494%	$23,328,516	16.25%	
			012		Home Cookin'	$24,447,235	5.89%	$24,596,000	6.28%	-.389%	$24,083,303	16.78%	
			011		First Choice	$24,746,312	5.96%	$23,757,681	6.07%	-.103%	$17,549,882	12.23%	
			006		Southern Sweet	$22,834,093	5.50%	$21,779,217	5.56%	-.059%	$14,574,722	10.16%	
			999		Private Label	$21,393,118	5.16%	$20,090,003	5.13%	.025%	$12,960,987	9.03%	
			001		Tip Top	$17,932,342	4.32%	$15,502,618	3.96%	.363%	$9,123,390	6.36%	
			008		Bing-a-ling	$13,074,353	3.15%	$10,608,441	2.71%	.442%	$7,990,706	5.57%	
			002		Dew Drop	$11,036,949	2.66%	$9,557,884	2.44%	.219%	$9,552,035	6.66%	
			007		SugarDrop	$7,734,294	1.86%	$8,137,584	2.08%	-.214%	$5,832,662	4.06%	
			005		Farm Crisp	$7,534,226	1.82%	$6,894,200	1.76%	.055%	$3,244,723	2.26%	
			003		SuperSweet	$5,341,607	1.29%	$5,736,336	1.46%	-.178%	$2,706,722	1.89%	
			004		Idaho Delight	$4,533,767	1.09%	$4,815,316	1.23%	-.137%	$2,069,931	1.44%	
		Grocery Division Total				$264,721,709	63.80%	$248,510,128	63.46%	.335%	$143,521,500	100.00%	$1
	302 Total					$264,721,709	63.80%	$248,510,128	63.46%	.335%	$143,521,500	100.00%	$1
301	Patrick Hurley	Grocery Division	009		Farm Fresh	$32,552,513	7.85%	$31,013,015	7.92%	-.075%			
			010		Prime Grown	$24,546,543	5.92%	$21,633,599	5.52%	.391%			
			012		Home Cookin'	$16,406,518	3.95%	$18,776,481	4.79%	-.841%			
			006		Southern Sweet	$12,240,676	2.95%	$10,382,210	2.65%	.299%			

Example 5: Remove Any Filters From A Level

This URL runs a view with ID 505. The URL tells the Stratum to remove any filters that exist on the RepBroker level.

https://server-xyz:60500/StratumView.aspx?ViewId=505&RepBroker=

Example 5: Using Captions vs Level Names In URL's With A Member Filter On A Level

URL's that filter views by member values must include the level name or its caption*. When you use this type of URL, Stratum will compare what you specify in the URL for the level name syntax against all existing level captions in the specified view and if a match is not found in the captions, will look at all levels in the Stratum Data Hub.

- The first match it finds will be used as the level for filtering. Stratum will look for matches with spaces as specified and then truncate spaces out of the name to look for a match if it can't find a match to the variation that included spaces.

- If a match is not found in the specified view definition, then the URL looks at levels in the Stratum Data Hub for a match. If a match is found, then that level is added to the view. If a match is not found, the specified level and members values are ignored and won't impact the view specified in the URL.

*Note: The caption is what displays in row or column headings for the level in the Stratum View. The caption can be customized by whoever sets up the view or left to be the same as the level name.

The following example URL's run a view with ID 507. That view has a level with a name of RepBroker that has a caption of "Sales Person". Each of the URL variations shown below will run the view and filter that level by two members. The first URL uses an acceptable caption variation of SALESPERSON. The next URL uses an acceptable caption variation of SALES PERSON. The last two URL's use an acceptable name variation, one with a space in the name and one with an all lowercase name.

https://server-xyz:60500/StratumView.aspx?ViewId=507&SALESPERSON=315;318

https://server-xyz:60500/StratumView.aspx?ViewId=507&SALES PERSON=315;318

https://server-xyz:60500/StratumView.aspx?ViewId=507&rep broker=315;318

https://server-xyz:60500/StratumView.aspx?ViewId=507&repbroker=315;318

Example Stratum Parameter Filters In URL's & Required Syntax

If you pass a Stratum Parameter filter via a URL, you must include the parameter and applicable values such as member values or a user list ID. This info is added onto the URL <u>after</u> the core components marked in red in this example URL. More examples are shown after this syntax table.
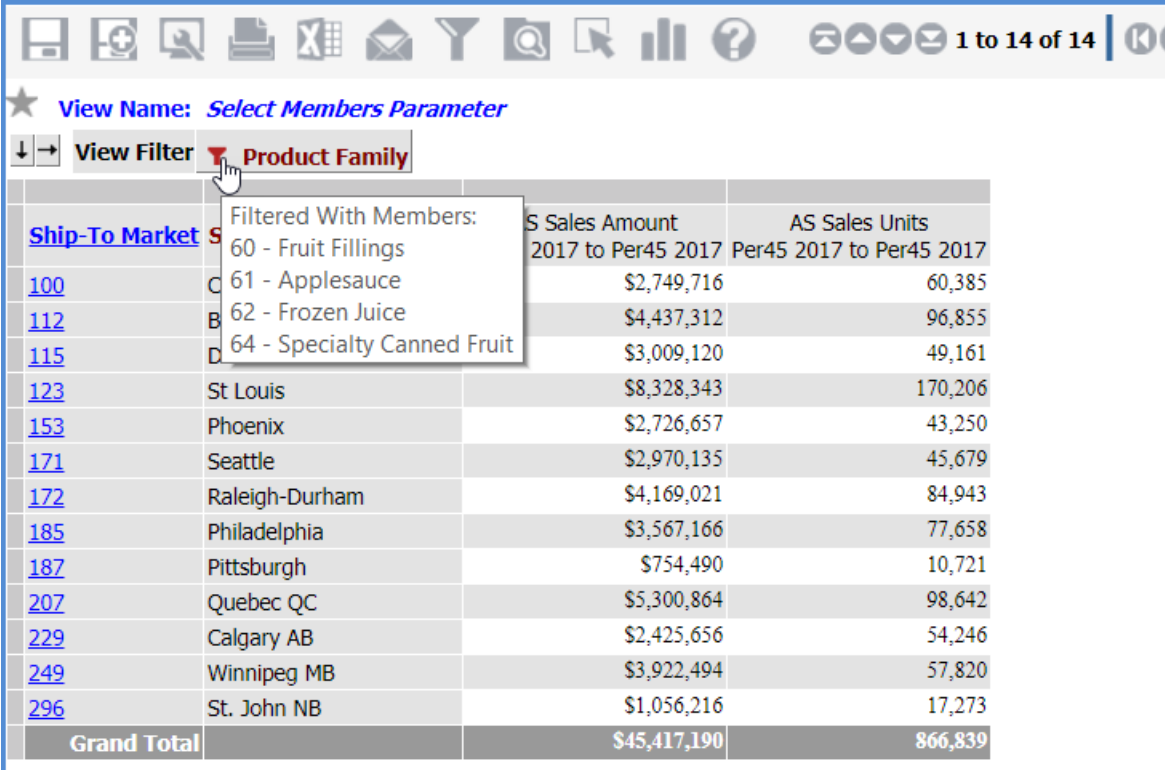
https://server-xyz:60500/StratumView.aspx?ViewID=472&vp:UserListParameter=13

Item	Format & Values	Required?
Stratum Parameters **&vp:**	If your view uses Stratum Parameters and you want to specify a filter using the Stratum Parameters, the syntax is as follows. &vp:<Stratum Select Member Parameter Name>=<Values to filter> &vp:<Stratum Drop Down Parameter Name>=<Value to filter> &vp:<Stratum User List Parameter Name>=<User List ID to filter> &vp:<Stratum Expression Parameter Name>=<Expression to filter> **Notes**: A semi-colon is used to separate multiple values specified for a Select Members type of parameter. If you want all members considered by a Select Members or Drop Down parameter, then you need to specify "All <name of the hierarchy associated with the parameter>" as the parameter value. The specified values for each parameter in the URL will either be included or excluded from view results based on how that parameter's Filter Mode is configured in Viewer. If a parameter has a mode of "Include", the values passed along to the view by the URL will be returned as part of view results. If a parameter has a mode of "Exclude", the values passed along the view by the URL will not be part of view results – all member values *except* the ones specified by the URL will be a part of view results.	Yes

Note: See also the topic Syntax For Customizing URL's Used To Share Views for optional syntax that can be added on to control what parts of the view display when it's run via the URL.

Example 1: Select Members Parameter That Passes Specific Values

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

https://server-xyz:60500/StratumView.aspx?ViewId=931&vp:MembersParameter=60;61;62;64

Example 2: Select Members Parameter That Passes All Values

This URL runs a view with ID 931. It returns all members for a Select Members parameter named MembersParameter that exists on the Product Family level. Notice there is no filter icon next to the Product Family level since the URL told the view to return all values for that level.

https://server-xyz:60500/StratumView.aspx?ViewId=931&vp:MembersParameter=All Product Family

View Name: *Select Members Parameter*

View Filter Product Family
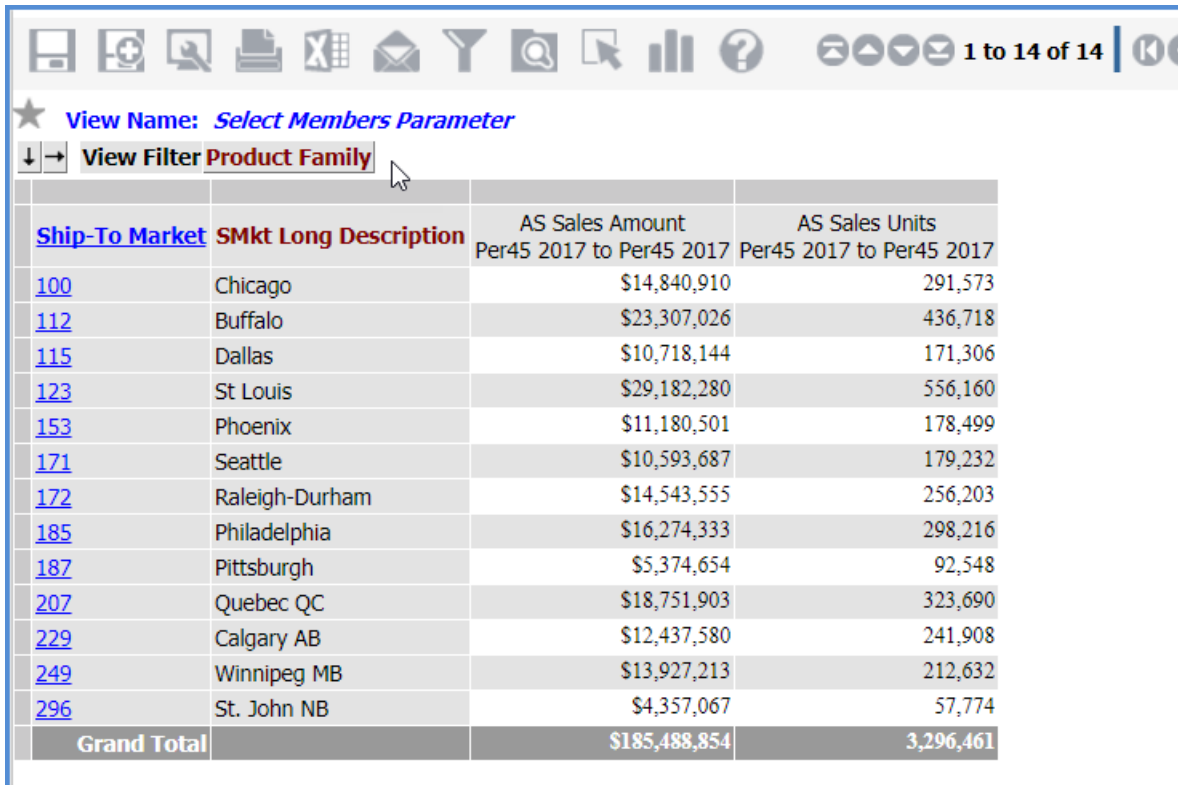
Ship-To Market	SMkt Long Description	AS Sales Amount Per45 2017 to Per45 2017	AS Sales Units Per45 2017 to Per45 2017
100	Chicago	$14,840,910	291,573
112	Buffalo	$23,307,026	436,718
115	Dallas	$10,718,144	171,306
123	St Louis	$29,182,280	556,160
153	Phoenix	$11,180,501	178,499
171	Seattle	$10,593,687	179,232
172	Raleigh-Durham	$14,543,555	256,203
185	Philadelphia	$16,274,333	298,216
187	Pittsburgh	$5,374,654	92,548
207	Quebec QC	$18,751,903	323,690
229	Calgary AB	$12,437,580	241,908
249	Winnipeg MB	$13,927,213	212,632
296	St. John NB	$4,357,067	57,774
Grand Total		**$185,488,854**	**3,296,461**

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Example 3: Drop Down and User List Parameters

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

https://server-xyz:60500/StratumView.aspx?ViewId=932&vp:DropDownRepParameter=300&vp:UserListShipToParameter=104

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

View Name: *Drop Down Parameter*
View Filter

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Working with Parameters

Example 4: Expression Parameter

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

After the parameter information, we included the syntax &vf=0 in order to hide the View Filter section.

https://server-xyz:60500/StratumView.aspx?ViewId=933&vp:ExpProdParameter=[Product].[Product].CurrentMember.Properties(" Prod ABC Classification") = "B"&vf=0

| | | | 🔢 1 to 20 of 1973 | 1 to 2 of 2 |

View Name: *Expression Parameter*

View Filter

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

Prompting Users to Choose the View Presentation Format

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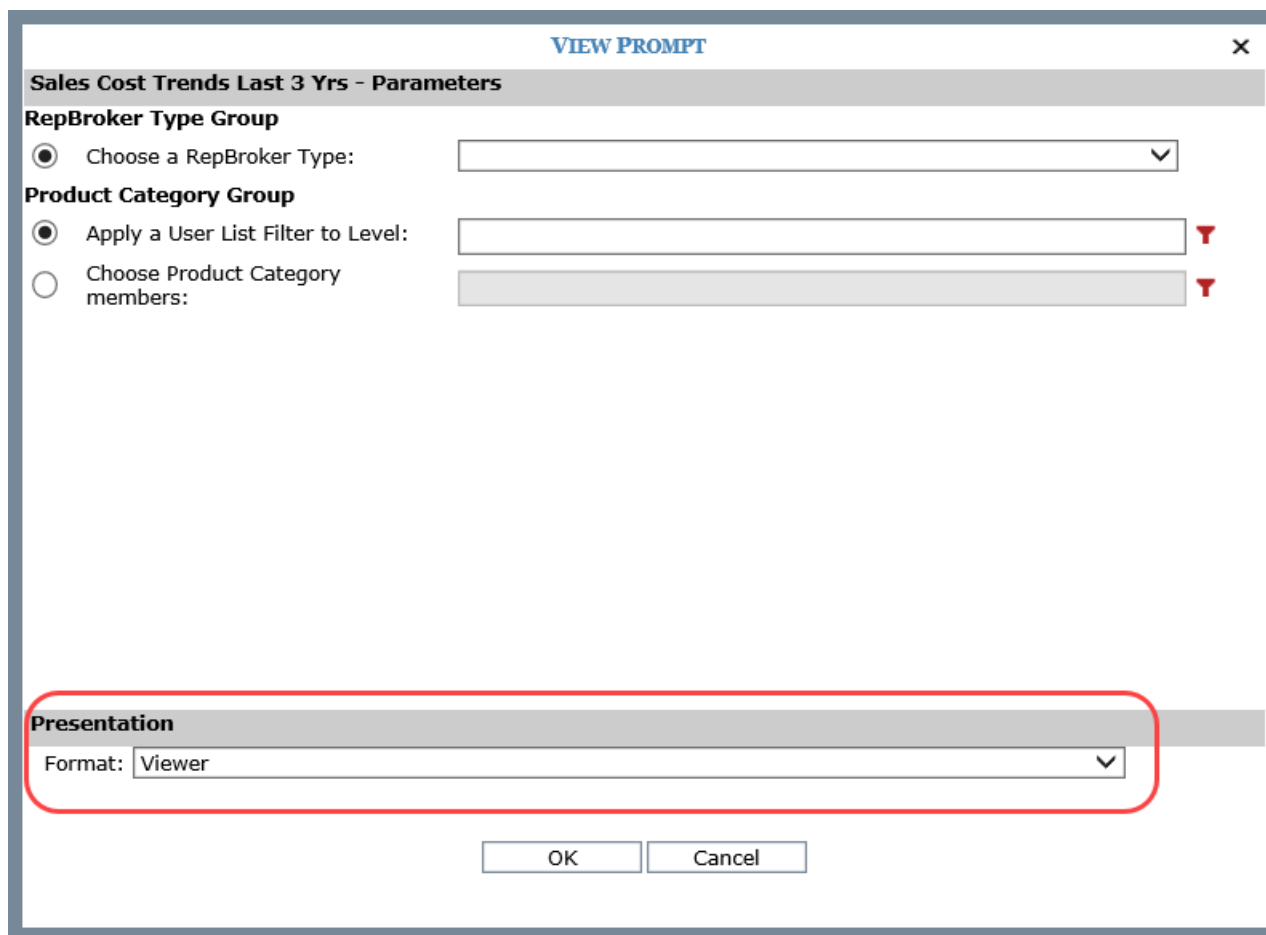
Properties - Presentation:	✕
Format:	Viewer ⌄
Prompt:	Yes ⌄

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

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

Working with Parameters

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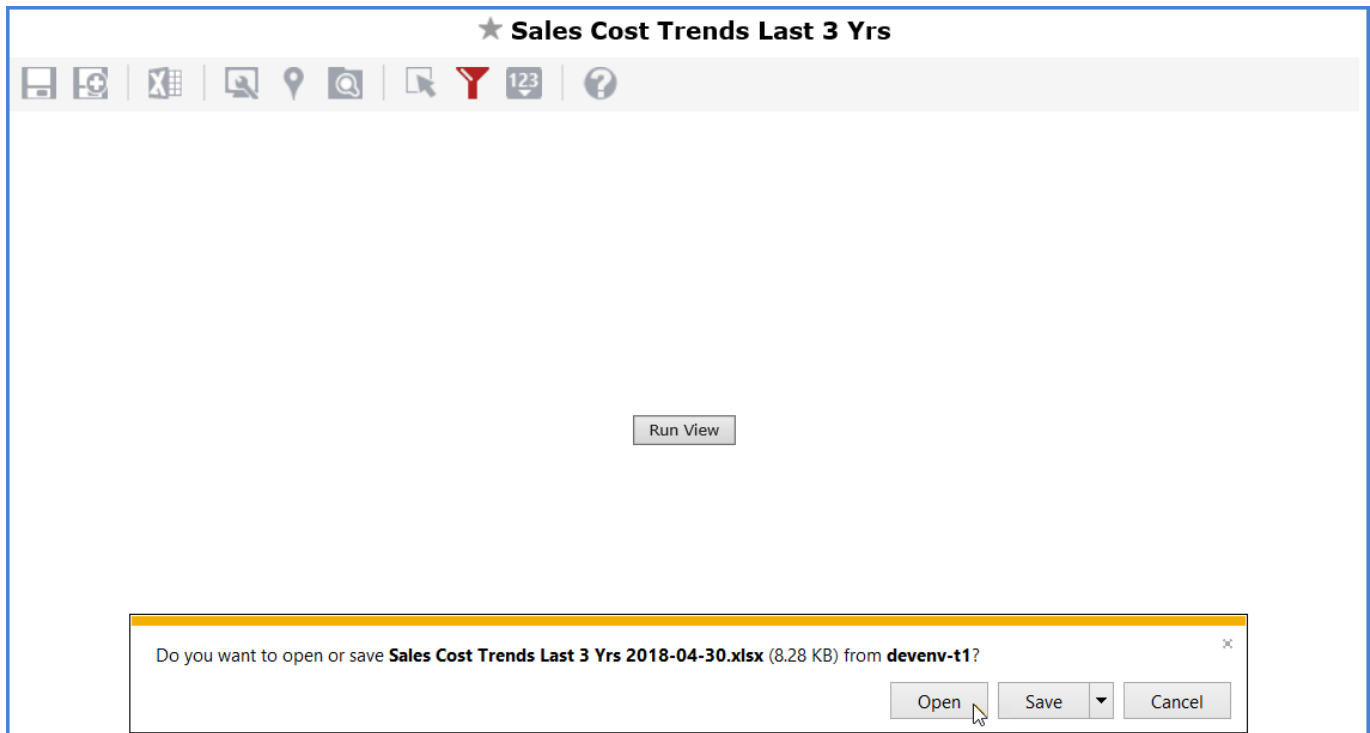
Removing Parameters While Performing a "Save As"

1. Click Save As in the grid toolbar.

2. Set up the properties for the new view and then de-select the Parameter Prompting checkbox.

3. Click Save.

Syntax For Customizing URL's Used To Share Views

The URL copied from the Share View URL window can be modified to control what parts of Viewer show when someone uses the URL. See the next table for details on all syntax that makes up a URL and that can optionally be added to the URL for customizing what displays with the grid or how the view is filtered. Here is an example URL, which runs the specified view with the Stratum View Pane and top panel hidden.

http://server-xyz:55001/StratumView.aspx?ViewId=386

Main Syntax And Additional Syntax Options

Item	Format & Values	Required?
StratumHostURL and **StratumView.aspx** file name	The Stratum URL includes either the http:// or https:// preface, the Stratum.View.aspx syntax, the name of the Stratum server, and the port number. Example: http://server-xyz:#####/**StratumView.aspx** where server-xyz is the name of the Stratum.Viewer server and ##### is its port number.	Yes
ViewId	The unique identifier of the view to be run. ViewID=# where # is the ID assigned to the view by Stratum.Viewer. **Note:** Always use a question mark **?** to separate the Stratum.View.aspx file name and the View ID.	Yes
Syntax For Controlling What Parts Of The Stratum & View Interface Display		
Stratum View Pane and top panel syntax **&SVP**	Showing the View Pane allows users to run other views or access other features. To show, use &SVP=1 To hide, use &SVP=0	No If syntax is not included, view pane and top panel are hidden.
Toolbar icons in grid toolbar syntax **&T**	Showing the icons gives access to features such as Email View, Save As, and other functionality. To show, use &T=1 To hide, use &T=0 **Note:** If you don't want any part of the toolbar to display and want to exclude the space typically reserved for it above the grid, use &T=0&P=0.	No If syntax is not included, toolbar icons will show.
Paging icons in grid toolbar syntax **&P**	Showing the icons allows users to page through results if there are multiple pages of rows and columns. To show, use &P=1 To hide, use &P=0	No If syntax is not included, paging icons will show.

	Note: If you don't want any part of the toolbar to display and want to exclude the space typically reserved for it above the grid, use &T=0&P=0.	
View name above grid syntax **&N**	To show, use &N=1 To hide, use &N=0	No If syntax is not included, view name will show.
View Filter section syntax **&VF**	To show, use &VF=1 To hide, use &VF=0	No If syntax is not included, view filter will show.
View explorer section syntax **&VE**	To let the display of view explorer be controlled by the "User Options" of the person running the URL, exclude the &VE from the URL. Set the item to 0 or 1 if you prefer this syntax in the URL to control the display of view explorer. The URL will ignore the view explorer "User Options" setting of the person running the URL. To show, use &VE=1 To hide, use &VE=0	No If syntax is not included, user options control the view explorer display.
Navigation Panel section syntax **&NP**	To let the display of the navigation panel be controlled by the "User Options" of the person running the URL, exclude the &NP from the URL. Set the item to 0 or 1 if you want this syntax in the URL to control the display of the navigation panel. The URL will ignore the navigation panel "User Options" setting of the person running the URL. To show, use &NP=1 To hide, use &NP=0	No If syntax is not included, user options control the navigation panel display.
Syntax For Passing Member Filters In URL's (examples)		
Level Name and member values	If you want to filter the view for a particular value(s), specify the level name and value(s) for the level(s) that will be used to filter the view. &<Level Name>=<Key Value> Example with one member specified: &Region=300 Example with multiple members specified: &Region=300;400 **Notes:** A semi-colon is typically used to separate multiple values specified for a single level. See the &D syntax in the next row of this table for more info and alternatives.	Optional; use if filtering by level members

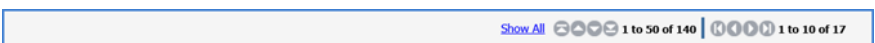|	The specified values for each level in the URL will either be included or excluded from view results based on how the level filter is configured in the view. If the level has an existing filter, that filter's mode of Include or Exclude will be retained. If the level does not have an existing filter, then an Include filter will be added.	
Delimiter that is used between key values URL using a member filter. Syntax **&D**	Defines the delimiter that is used between key values. Choose a delimiter that will not exist in your key values. For example, if your key values typically include a semi-colon, then you will need to choose a different delimiter. Do not use & or = as a delimiter.	Optional alternate
Syntax For Passing Stratum Parameters In URL's (examples)		
Stratum Parameters **&vp:**	If your view uses Stratum Parameters and you want to specify a filter using the Stratum Parameters, the syntax is as follows. &vp:<Stratum Select Member Parameter Name>=<Values to filter> &vp:<Stratum Drop Down Parameter Name>=<Value to filter> &vp:<Stratum User List Parameter Name>=<User List ID to filter> &vp:<Stratum Expression Parameter Name>=<Expression to filter> **Notes**: If you want all members considered by a Select Members or Drop Down parameter, then you need to specify "All <name of the hierarchy associated with the parameter>" as the parameter value. The specified values for each parameter in the URL will either be included or excluded from view results based on how that parameter's Filter Mode is configured in Viewer. If a parameter has a mode of "Include", the values passed along to the view by the URL will be returned as part of view results. If a parameter has a mode of "Exclude", the values passed along the view by the URL will not be part of view results – all member values *except* the ones specified by the URL will be a part of view results.	Optional; use if filtering by Stratum Parameters
Tips For Locating Info Used In URL's		
Where To Find View ID's	Search for the view using the top panel in Stratum and look at the ID in the View list window where search results show up. If you are already using the view, right-click its name and select Properties. The ID shows in the Properties window.	Yes
Where to Find Level Names	You can use either the level name or its caption in the URL syntax. The caption always displays in the grid when you run the view. Level names and their captions display in a level's Properties window. Right-click the level in the Stratum view or view explorer and select Properties.	Optional; use if filtering by level members
Where To Find Stratum Parameter Names	Any URL copied from the Share View URL window contains the names of parameters if the view has Stratum Parameters. The name of a parameter also can be found in view explorer. Right-click the associated view name in the Stratum View Pane and select Edit. Expand the parameter group for the parameter to see the parameter name. The name also shows in its Properties window, accessed by double-clicking the parameter in view explorer.	Optional; use if filtering by Stratum Parameters

Where To Find User List ID	A User List ID is needed if your URL references a User List Parameter. To find an ID, go to Stratum's User List list window and look at the List ID info for the list. If you have a list open in the User List Maintenance window, the List ID shows as one of the properties in the Attributes section of the window.	Optional; use if filtering by Stratum User List Parameter

Legacy Syntax For Stratum View URL's

The Default.aspx and ViewWindow.aspx syntax has been replaced by the StratumView.aspx syntax. While the Default.aspx and ViewWindow.aspx syntax will continue to work, it is recommended that you convert any old syntax to use the new StratumView.aspx syntax. The old syntax is shown in the table below. We recommend replacing any references to Default.aspx and ViewWindow.aspx in old URL's with the newer page StratumView.aspx.

Full details about the latest syntax for URL's that run views can be found in the topic Syntax For Customizing URL's Used To Share Views.

Item	Old Format & Values	Required?
*.aspx file nameused in the URL	ViewWindow.aspx or Default.aspx **Note:** The *.aspx used determines if the top frame and left panel display. To show, Default.aspx is used in URL. To hide, ViewWindow.aspx is used in URL. As of Stratum 7.3, the top frame and left panel are known as the top panel and Stratum View Pane.	Yes
Grid toolbar icons and paging icons	Two pieces of syntax are used in combination with each other to control whether all, some, or none of the toolbar shows above a view. They are IsHideToolbar and IsHideToobarIcon. Examples follow. To **show all parts of the toolbar**, leave the syntax at its default of &IsHideToolbar=false&IsHideToobarIcon=false in your URL. To **hide all parts of the toolbar**, use the syntax &IsHideToolbar=true&IsHideToobarIcon=true in your URL. To hide the paging icons and **show just the main icons in the toolbar**, use the syntax &IsHideToolbar=true&IsHideToobarIcon=false in your URL. To **show just the paging icons** and hide all other icons in the toolbar, use the syntax &IsHideToolbar=false&IsHideToobarIcon=true in your URL. 	No If syntax is not included, toolbar and paging icons will show
View name above grid	To show, use IsHideViewName=False To hide, use IsHideViewName=True	No If syntax is not included, view name will show.
View Filter section	To show, use IsHideViewFilter=False To hide, use IsHideViewFilter=True	No If syntax is not included, view filter will show.

View Explorer	To let the display of view explorer be controlled by the "User Options" of the person running the URL, leave IsHideExplorer blank or don't use the syntax in the URL. It's blank by default in URL's copied from the View URL window that's accessed from the Stratum View Pane. IsHideViewExplorer= Set the item to True or False if you want the URL to control the display of view explorer. The URL will ignore the view explorer "User Options" setting of the person running the URL. To show, use IsHideExplorer=False To hide, use IsHideExplorer=True	No If syntax is not included, user options control the view explorer display.
Navigation Panel	To let the display of the navigation panel be controlled by the "User Options" of the person running the URL, leave IsHideNavigationPanel blank or don't use the syntax in the URL. It's blank by default in URL's copied from the View URL window that's accessed from the Stratum View Pane. IsHideNavigationPanel= Set the item to True or False if you want the URL to control the display of the navigation panel. The URL will ignore the navigation panel "User Options" setting of the person running the URL. To show, use IsHideNavigationPanel=False To hide, use IsHideNavigationPanel=True	No If syntax is not included, user options control the navigation panel display.
Syntax For Passing Stratum Parameters In URL's (examples)		
Stratum Parameters **&vp:**	If your view uses Stratum Parameters and you want to specify a filter using the Stratum Parameters, the syntax is as follows. &vp:<Stratum Select Member Parameter Name>=<Values to filter> &vp:<Stratum Drop Down Parameter Name>=<Value to filter> &vp:<Stratum User List Parameter Name>=<User List ID to filter> &vp:<Stratum Expression Parameter Name>=<Expression to filter> **Notes**: If you want all members considered by a Select Members or Drop Down parameter, then you need to specify "All <name of the hierarchy associated with the parameter>" as the parameter value. The specified values for each parameter in the URL will either be included or excluded from view results based on how that parameter's Filter Mode is configured in Viewer. If a parameter has a mode of "Include", the values passed along to the view by the URL will be returned as part of view results. If a parameter has a mode of "Exclude", the values passed along the view by the URL will not be part of view results – all member values *except* the ones specified by the URL will be a part of view results.	Optional; use if filtering by Stratum Parameters