Aggregationsmask



Up to CoPlanner Version 9.0

FURTHER INFORMATION

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INTRODUCTION

GENERELL

To create a new Aggregationsmask, change to the developer mode first and select the “Object administration” menu item from the CoPlanner menu. Then highlight the required folder (in this case the folder called “example folder”) and select the menu item “New” - object “Agg mask” by clicking the right mouse button in the context menu.

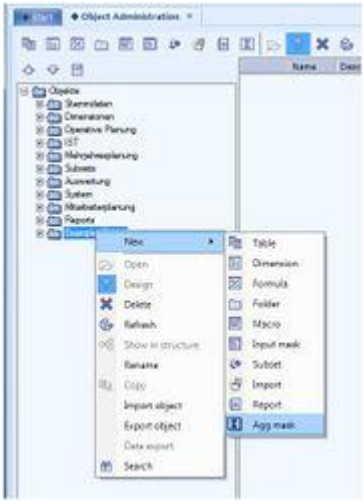


Figure 1: Framework, Create Aggregationsmask

NAME, DESCRIPTION

In the next step, assign names and description to the Aggregationsmask in the open window.



Figure 2: Framework, Create new Aggregationsmask

Finally, confirm by pressing “OK”. Now the mask is created and appears underneath the corresponding folder.

Hint The name of an object must not contain any special characters or blanks, and it must be unique throughout the world of object administration – for instance, if a table called “Sales” already exists, it is not possible to also create a folder and name it “Sales” as well. In contrast, descriptions may contain special characters and do not have to be unique.



Figure 3: Framework, Newly created Aggregationsmask

OPENING AN AGGREGATIONSMASK

To open an Aggregationsmask later, you must call it up in the navigation menu.

Hint Please note that you can have an Aggregationsmask – once it has been created - displayed in the ribbons by using the navigation designer.

EDITING AN AGGREGATIONSMASK

PowerUsers can edit existing Aggregationsmasks and create new Aggregationsmasks. Change to the developer mode and open the design of the required Aggregationsmask in the object administration

EDITING

When you enter the design mode, the following window opens:

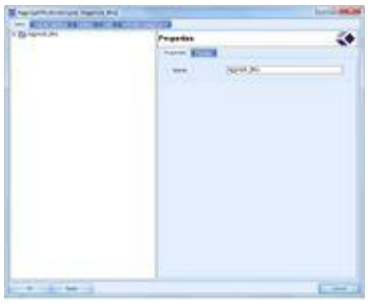


Figure 4: Framework, Aggregationsmask – Design mode

The aggregate mask designer consists of the following 5 tabs:

- Data
- Column settings
- Options
- Lists
- Definition assignment

DATA

The data designer is the heart and soul of mask designing. This is where you choose the data to be shown in the mask.

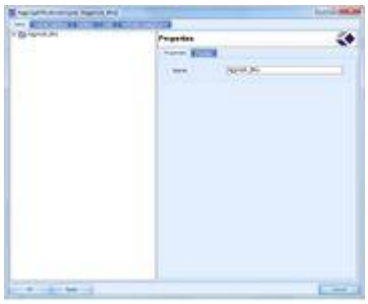


Figure 5: Framework, Aggregationsmask – Design mode

On the left, you see all available objects of your mask, on the right you see the settings made for an element respectively a preview of the queried data. The elements available in the tree will now be explained in detail.

The topmost node of the tree has the name of the mask. In “Properties”, you can change it.



Figure 6: Framework, Aggregationsmask – Changing the name

FILTER

Filters are the criteria that select the required datasets from the totality of the data. In the filter area, you can create any filters – the tables to which they apply are defined in the tables themselves. In this way, you can also achieve different filtering processes within a single mask.

Hint The created filters must then also be assigned to the used table, otherwise the filters do not have any influence on the data. This also means that you can deliberately choose not to link a filter to a certain table of the mask.



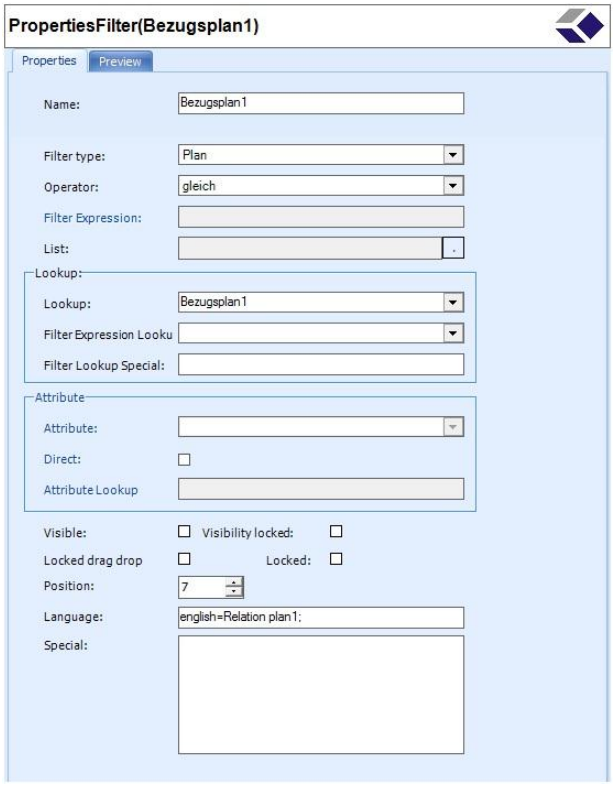
Figure 7: Framework, Aggregationsmask – Creating a new filter

The following filter types are available:

Plan	To select a certain plan
Dimension	To select certain dimension elements
Lookup	To select used keys (e.g. VAT rates)
Currency	To select a certain currency
TextColumn	To enter or select text (selection from own lists possible – see below)
DateColumn	To enter date
NumericalColumn	To enter decimal values
BoolColumn	To select TRUE or FALSE

Once the filter has been created, you can define the new filter in the Properties window. The settings are described based on the most frequently used filters, i.e. plan, dimension, lookup and text column.

Plan



Name of the filter

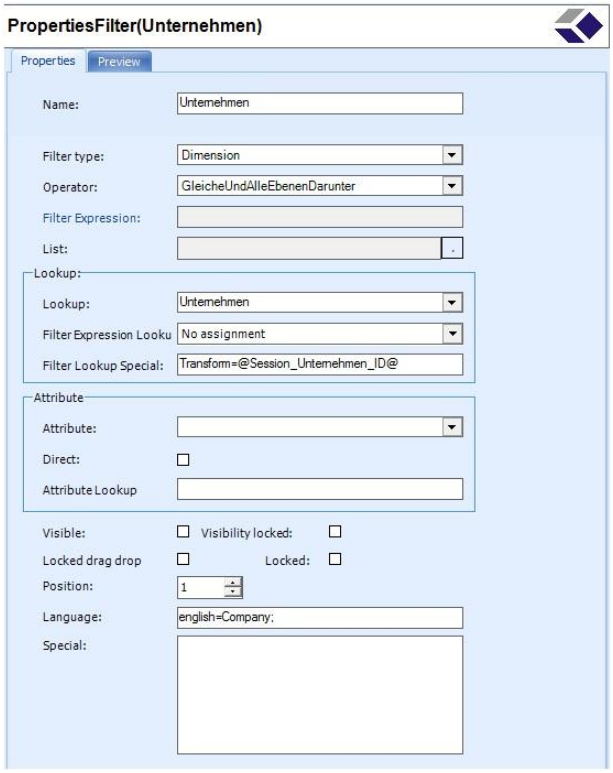
Filter type PLAN
Filter setting IS

Default plan (is automatically selected when the report is opened)

Filter visible?

Position in the filter bar

Dimension



Name of the filter

Filter type DIMENSION
Filter setting

Dimension Default-Wert

Sets the default value by applying a function
Transform = @Session_Unternehmen_ID@
Retrieves the company where the user is logged in

Filter visible? Filter can be unhidden/hidden?

Filter dragging allowed? Filter not changeable?
Position in the filter bar Translation Special:
Special functions are shown here.

Examples filter lookup special

A further typical example is

Transform=@Session_JP_DimJahr_Von@

In this case, the year of the plan where the user is logged in is set as a default value. With formulae, calculations can also be made, for instance

Transform=fkt_TimeDimAdd(Y,−1,@Session_JP_DimJahr_Von@)

This means that one year is deducted from the plan year, i.e. the previous year is calculated.

Special

AXIS_ATTRIBUT=[CopDimElemColor];

If the dimension includes an attribute (text field) with the name of CopDimElemColor, the entry of this field is used for the background color of the corresponding dimension element.

Criterion=<$Zeit.Ausdruck$>;

To synchronize filters, the reference to the filter from which synchronization is to be performed is set in the dependent filter. In the example above, the expression that is set in the time dimension is retrieved for the dimension with the special expression. Here, an extended call such as

criterion=fkt_TimeDimAdd(Y,1, <$Zeit.Ausdruck$>)

is also possible. In this way, the element set in the time filter is applied with a one-year time offset.

Hint The filter can only be synchronized if the base filter is also assigned to a matrix table.

Hint A filter synchronized in this way cannot be manually reorganized in the mask – even if it appears to be possible. After all, when datasets are saved the synchronization is again performed first and the filter is set to the value calculated in the expression.

AXIS_FILTER_COPSYS_LDIM_631593219503482784_1=COPSYS_LDIM_631593219503482784_1;

According to the pattern: AXIS_FILTER + "_Filter column "= "Column name in axis dimension", it is possible to use filters in this way in order to restrict the elements shown in an axis.

For instance, if the Cost center dimension is added as an attribute in the products dimension and if the products are subsequently assigned each to an element of the Cost center dimension, the above command can restrict the products shown in the axis to those that correspond to the Cost center filter. For the assignment

Product A -> Profit center 1

Product B -> Profit center 1

Product C -> Profit center 2

filtering by Profit Center 2 results in a reduction of the products axis to the Product C element.

Cascading Filter

A further possibility to control filter offers the function AttributFilter.

AttributFilter(AttribColName,FilterOperator,Kriterium)

Depending on product groups the filter "Products" displays only these products, which are assigned to the selected product group.

AttributFilter(Produktgruppen,me_under,<Produktgruppen.Ausdruck>);

Hint To show this function in the matrix too, look at field „Spezial".

Filter can also be controlled absolute. For example only leaf elements, only months or only the plan period should be displayed.

ElementFilter(OnlyLeaves);

Only leaf elements are displayed.

ElementFilter(OnlyPlanTimeMonths);

Only months are displayed.

ElementFilter(OnlyPlanTime);

Only the plan period is displayed.

CheckOut

One user only can enter values in this mask, if he has opened the mask exclusive. A further user can open this mask only read only at the same time. Die protection refers to one or more dimensions and the selected element while opening.

CheckOut;

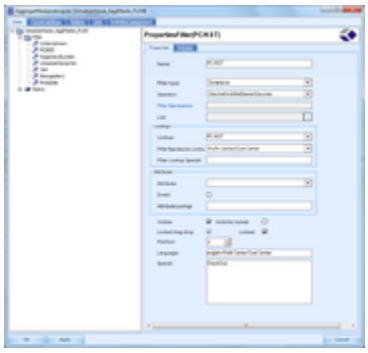
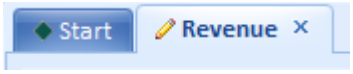


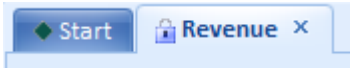
Figure 8: Aggregationsmask, Check out

The first user to open the mask gets following symbol in the register: 

Each further user gets following dialog and the mask opens read only.



Figure 9: Aggregationsmask, Area already checked out

In the register following symbol will be displayed: 

In this example the mask is locked for each further user, because of the root element "Profit Center/Cost Center" is selected in "Filter Expression LookUp". Additionally the option "Locked" is selected. So the user can change the filter.

Hint The check out-logic only is validated while opening the mask.

Lock

This function locks data entry in measures, where the entered condition is true. In this example the data entry will be locked on the first level.

Lock([Products.Level]=1);

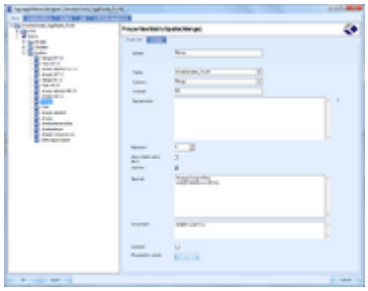


Figure 10: Aggregationsmask, Lock

The mask looks like the following:

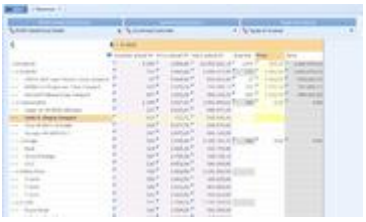


Figure 11: Aggregationsmask, elements of the first level are locked

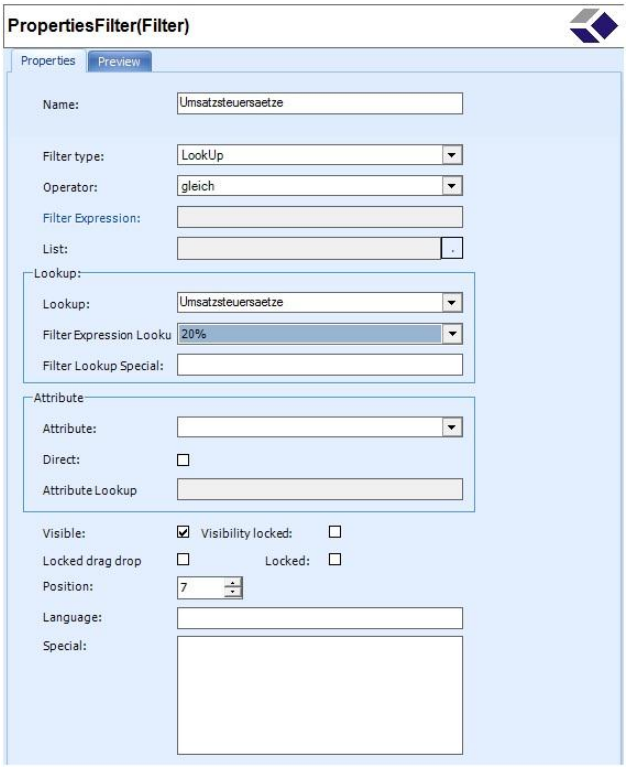
Following functions are available:

- Reference to a measure of the mask([Quantity], [Value], etc.)
- Dimensions and attributes ([Products.ID], [Profit Center/Cost Center.vs_key], etc.)
- Session variables (@Session_Plan_ID@, @Ist_Bis@, etc.)
- Formulas (fkt_TimeDimAdd, etc.)

Example:

Lock([Products.Level]=1 AND [Quantity]>0);

Lookup



Name of the Filter

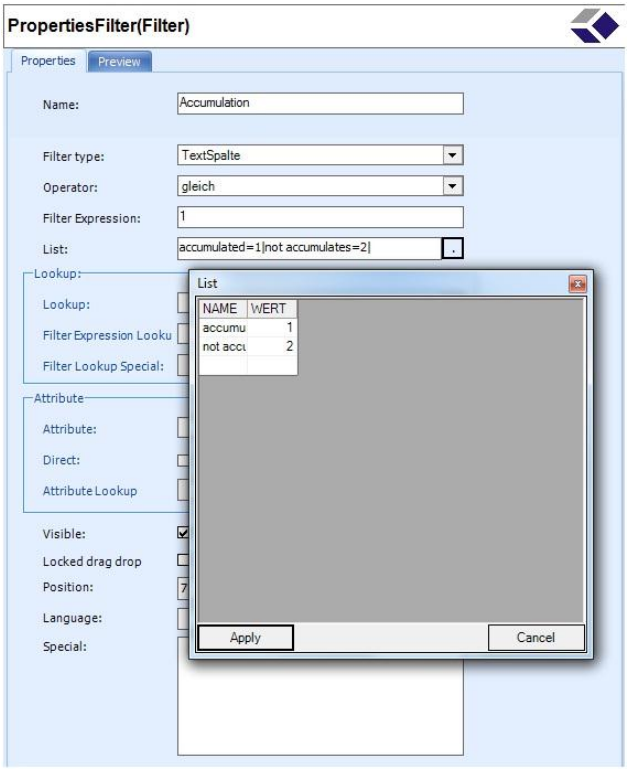
Filter type LOOKUP
Filter setting IS

Key table Default value (is automatically selected when the report is opened)

Filter visible?

Position in the filter bar

Text column



Name of the filter

Filter type TEXT COLUMN
Filter setting IS
Default value (entry of VALUE from list)
List entries To show the selection from a list in the filter bar

Filter visible?
Position in the filter bar

Preview: In the Preview tab, the view and/or arrangement of the filters can be verified. The table underneath the filter bar shows the exact data contained in the automatically created filter table. These data can later be queried in the report.

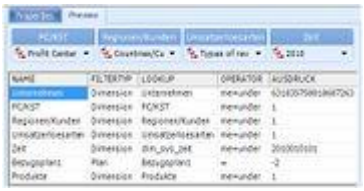


Figure 12: Aggregationsmask, Data preview filters

MATRICES



Figure 13: Aggregationsmask, Creating new matrix table

For each mask, only one matrix is required. It consists of the following 3 elements

- Axes
- Tables
- Columns

The axes determine the depiction space – a horizontal and a vertical axis can be defined. The use of only one axis is also permissible, but at least one axis must be specified.

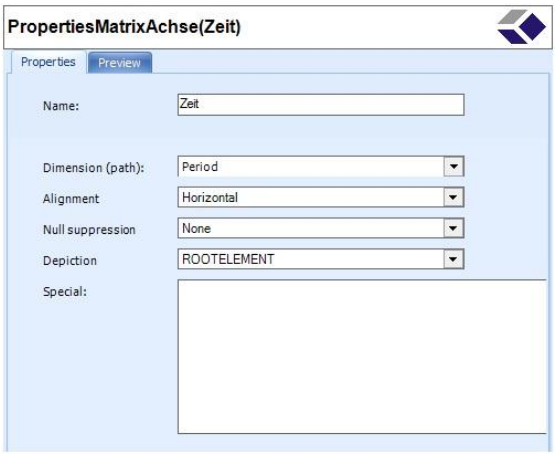
The tables of a matrix determine the origin of the data – any amount of tables can be represented in a matrix (e.g. the tables Sales actual and Sales budget). As long as the dimensions used as axes on the

matrix are contained in a table, it can be added to a matrix – for instance, if the dimensions “Products” and “Time” are used as axes, it is not possible to add the “movement balance” table because it does not contain a “Products” dimension.

When the axes and tables are defined, it is finally necessary to define the values to be shown. This is done in the “Columns” area.

Axes

Hint Before you can define the axes of your matrix, it is necessary to define a base table from among the tables. It serves as the base for the possible axes.



Denomination of the axis

Choice of the dimension Alignment: horizontal, vertical
Null suppression

Representation and special: see below

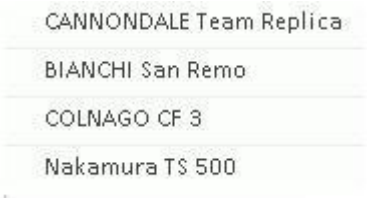
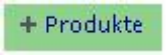
Null suppression can be defined for the axes. It hides empty lines to reduce the matrix to the essential elements.

The following variants of null suppression are distinguished:

- None = no null suppression
- Nothing = only empty fields are suppressed
- Number = empty fields and fields containing a 0 are suppressed

With respect to the representation of the axes, it is possible to choose which elements of a dimension are shown.

Denomination	Description	Example
ALL	Nodes and all subordinated elements	– Produkte – Rennräder CANNONDALE Team Replica BIANCHI San Remo
ROOT	Nodes and one level below	– Produkte + Rennräder + Bikes + Trekking

LEAF	Only the last levels	
ROOTELEMENT	The element given as the start element is shown closed	
ROOT1	Root element and next level	
ROOT2	Root element and the next 2 levels	
ROOT3	Root element and the next 3 levels	

SPECIAL

The special field is available to make additional axis settings:

Breakdimension

A dimension is automatically shown hierarchically. For the representation in flat form, the hierarchical structure can be dissolved with the Breakdimension command – however, this is only possible if the node itself does not have values. For instance, this is possible in the aggregation mode “none”.

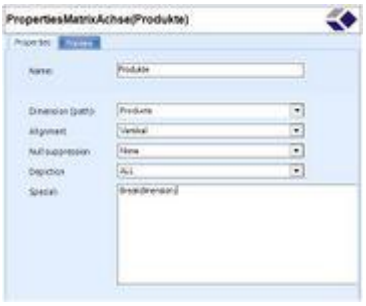


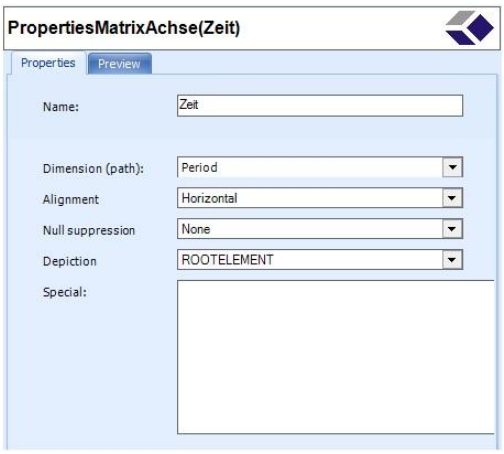
Figure 14: Aggregationsmsak, Breakdimension

Overview of all commands

BreakDimension;	Breaks the dimension. In combination with null suppression, node elements are hidden although subordinated levels have values – provided that no aggregation to the nodes themselves occurs.
SuppressNoAssignment;	Hides the element “No Assignment” in the representation. (Caution: In the developer mode, the command does not have any effect!)
SuppressRoot;	Hides the topmost element of a dimension. (Caution: in the developer mode, the command does not have any effect!)
ONLYISTTIME;	Only elements of the actual period are shown
OMLYTPTIME;	Only elements of day planning are shown
ONLYMJPTIME;	Only elements of multiannual planning are shown
ONLYMJPPLUSTIME;	Only elements of multiannual planning and of the previous fiscal year are shown
ONLYPLANTIME;	Only elements of the plan period are shown
MarkNonLeavesReadOnly;	All axis elements that have sub nodes, in other words that are not leaf elements, are write protected. This means only leaves can be written.

	Hint If axes can be exchanged and if the setting is also to be active when the dimension is used as a filter, please define this restriction in the special field of the table (see below).
AXIS_ELEMENT=('Key: ' + [vs_key]);	Overwrites the name of the axis element with formula – for instance here, the entry "Key: 4711" is shown on the axis for the element with the vs_key 4711 instead of the name.
AXISPATH=COPSYS_LDIM_..._1.@SESSIONABHÄNGIGE_SUBSETID@;	Override of the set axis dimension with dynamic property. For instance, a separate subset can be defined for each planner, which is then shown in dependence on the login. For this purpose, the subset to be used is queried via a formula in a parameter table (depending on the login data). **Hint** Technically sophisticated! For further information, please consult your adviser!
AXIS_ATTRIBUT=[CopDimElemColor];	If the dimension has an attribute (text field) with the name CopDimElemColor, the entry of this field is used to set the background color of the corresponding dimension element (see tutorial: adjusting the colors of a mask). **Hint** Can also be used in the filter. If dimensions can be dragged in the mask with drag & drop, the use in the filter is recommended. Dimensions that are defined as axis and filter obtain their orientation, also on the axis, from the settings made in the filter. The filter setting remains notwithstanding the exchange of axes.

For the other settings of an axis, please refer to the following example:



Name of the axis (any)

Dimension from base table

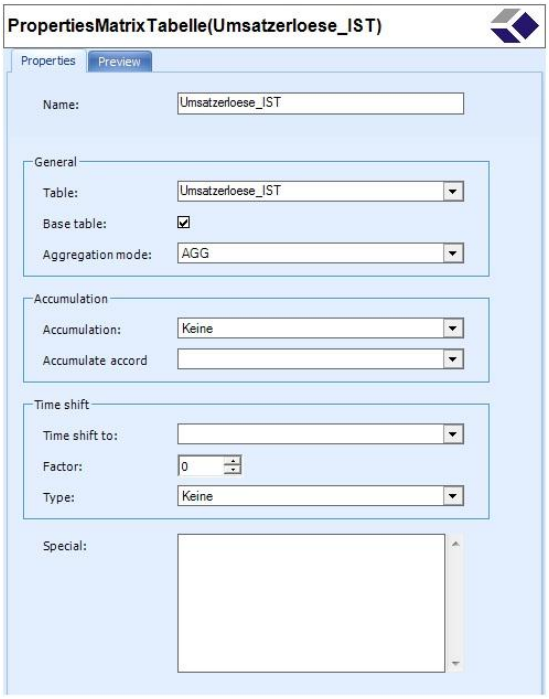
Alignment of the axis
Null suppression (see above)
Depiction variant (see above)

Tables

To add a table to a matrix, right-click the "Tables" folder or the "Matrix" folder and select "New matrix table".



Figure 15: Aggregationsmask, Creating a new matrix table



Name of the table

Data base from CoPlanner
Checkbox for base table checked (see below)

Aggregation mode (see below)
Cumulation setting (see below) Time axis for cumulation

Time axis for time shift Factor of the time shift Period of the time shift

Hint Basis table: In order to be able to define the axes of your matrix, you must define a table as the basis table. For this purpose, please check the “Base table” checkbox on a table (under table properties). Only one table may be checked as the base table.

In the table, the following aggregation modes may be used:

- None = no aggregation
- AGG = aggregation to the next node
- Member = aggregation to the individual element

The following cumulation settings are possible:

- L = ongoing, i.e. also spanning several years (no sum break)
- F = cumulation to the fiscal year
- C = cumulation to the calendar year
- Q = cumulation to the quarter
- M = cumulation to the month
- W = cumulation to the week

Special (field)

In the “Special” field, additional commands may be entered. See the following overview:

Products=MarkNonLeaves ReadOnly;	All axis elements of the products dimension (example on the left) featuring sub nodes i.e. that are not leaf elements, are write protected. This means that only leaves are writeable. This function can also be allocated in the axis itself (see above). However, as soon as axes can be exchanged or as soon as the setting is to be active even when used as a filter, the definition on the table is recommended.
Time_Aggmode=Member; Products_Aggmode=AGG;	Override aggregation mode per axis – here, for instance, the aggregation mode of the time axis is set to member even if the entire table has the aggregation mode AGG. If path dimensions are used, the start dimension must be used here.

CUSTOMROLLUP=LASTMONTHONYEAR;	Overrides the annual value in the time dimension and shows the value of the last month of the year instead.
CUSTOMROLLUP=FIRSTMONTHONYEAR;	Overrides the annual value in the time dimension and shows the value of the first month of the year instead.
CUSTOMROLLUP=LASTNONEMPTYMONTHONYEAR;	Overrides the annual value in the time dimension and shows the value of the last non-empty month of the year instead.
CUSTOMROLLUP=LASTCHILDONPARENT;	Overrides the value of nodes on the time axis (or a time subset) and shows the value of the last leaf element instead. **Hint** Is applied when the time subset is used.
CUSTOMROLLUP=FIRSTCHILDONPARENT;	Overrides the value of nodes on the time axis (or a time subset) and shows the value of the first leaf element instead. **Hint** Is applied when the time subset is used.
LOCK=DELETE;	Prevents the deletion of elements in the table. Although the deletion button is pressed, there is no deletion. This prevents an unintentional deletion of values – instead, they can also be overwritten with 0. **Hint** If the property is set for a table, it applies to the entire matrix.
LOCK=WRITE;	Prevents the writing of elements on this table – can be used for safety. **Hint** If the property is set for a table, it applies to the entire matrix.
DIM_ALIAS_ + „AliasInTable“=“AliasInBasis“;	If the IDs of datasets between dimensions are identical, although different dimensions are used, this can be used to establish a manual reference. **Hint** Technically sophisticated! For further information, please consult your adviser!!
IgnoreAxisDim=PC/KST; IgnoreAxisDim=PC/KST.UKV.Umsatz.Sub_GuVUKV;	Ignore axis for tables

Table filter

When a table has been created, the required filters have to be assigned to it. For this purpose, right-click the relevant table and choose “Apply filter”.

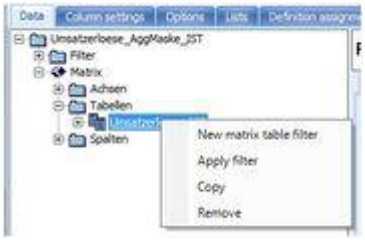


Figure 16: Aggregationsmask, Table filter

In the following dialogue, you can either apply all filters of the filter bar or you can uncheck some of them (by double-clicking the check box).



Figure 17: Aggregationsmask, Table filter

Hint When adding again: existing filters are not replaced! Therefore, only highlight newly added filters, otherwise double filters will be created.

You can also set filters manually. For this purpose, please use the option “New MatrixTableFilter” (by right-clicking on the relevant table).

In properties, please make the following settings:



Name of the filter

Filter from filter table Column to which the filter relates

Columns

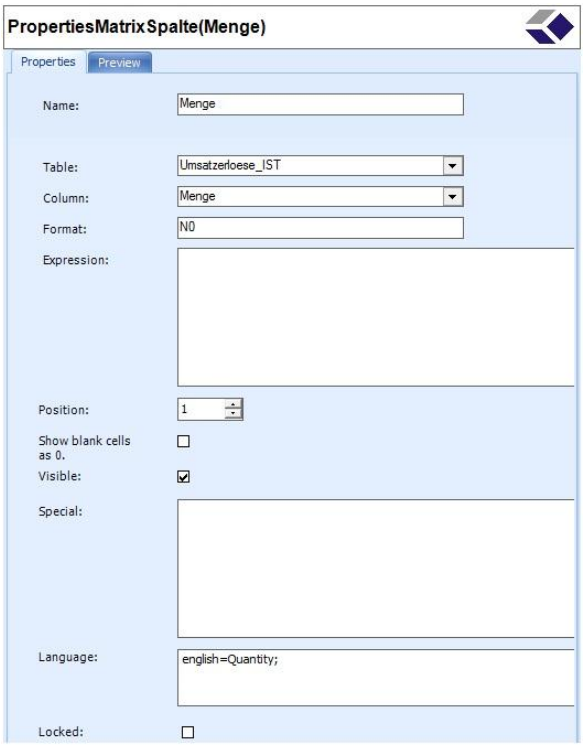
In order to add a column to a matrix, right-click the “Tables” folder or the “Matrix” folder and select “New column“.



Figure 18: Aggregationsmask, Columns

Columns may contain values from the tables created above or own calculations (e.g. with these values).

The following settings are required for a column from a table:



Column name

Table of origin Column of the table of origin Format string (see below)

Position of the column in the table. Show “0” in blank cells Column visible in table

Expression

The expression field is available to state calculations that define the display value of the column. In this way, calculations can be done at mask level. Contrary to calculated fields of a table, it is possible here to access all columns of the matrix, i.e. also columns from other tables.

Possible functions:

All system functions (IIF, SUBSTRING, CONVERT, operators, …)	
All session variables	
All application properties	
All CoPlanner functions (fkt_CIF, fkt_GetRecord, fkt_TimeDimAdd, …)	
ASTEXT(iif([Wert]>100,'Fehler!','OK'));	Changes the return value to a text expression (default=number or double) **Hint** If no conversion is executed in this example, the mask returns an error because the expression “OK” cannot be converted into a figure. The field is automatically transformed into a text field (left align).
ASDATUM([Datumsmeasure]);	Changes the return value to a date expression (default =number or double) The field is automatically transformed into a date input field.
ASINT([Dezmeasure]);	Changes the return value to a decimal (default =number or double)
ASBOOL([Booleanmeasure]);	Changes the return value to a Bool expression (default =number or double)

	The field changes automatically to Bool (checked/unchecked).
Attribute(Time);	Shows the COPSYS_ID of a filter or an axis. The example supplies the time ID of the corresponding axis element. This can be used for IIF queries, for instance.

Hint If a table and a writeable column are selected simultaneously, inputs are automatically written into this column – however what will be displayed is the value obtained from the formula in the expression.

Spezial

In “Special”, the following additional settings can also be made:

Inputvalue

While expressions (see above) calculate on mask level, this special setting can be used to execute calculations on the dataset level.

InputValue=([Table.Value]*[Table.Structure.Value]);
InputValue=IIF([GuV_PLAN.dim_sys_zeit_1.COPSYS_ID]>2,[GuV_PLAN.Value],0);

Hint Only the assigned table can be used as a table. Caution. It is always necessary to select a column!

The default return type is double, but it can be changed over with a leading ASTEXT, ASDATUM or ASBOOL, for instance:

InputValue=ASTEXT(´adsf´)

All types set with AS* have “None” as the aggregation type. With an ASDOUBLEAVG, the return type remains double, however the average of the input values is calculated.

InputValue=ASDOUBLEAVG([Tabelle.Value]*[Tabelle.Struktur.Value]);

With InputValue, it is possible to call up all functions of the formulae (such as in a SAME-formula).

Hint The calculation is performed separately for each source cell, which may involve long waiting times. Therefore, use this possibility with care. If possible, use already calculated columns at table level instead or try to find a mask-based solution through the expression field.

CalcBack

As the name already suggests, with this special setting it is possible to “calculate back”. For instance

CalcBack[MeasureZiel]=[Measure1]*[Measure2]

Let the quantity and the price be database fields in the example quantity x price=sales, and let sales be a calculated field. The following formula is used to calculate the necessary amount through an input in the sales field:

CalcBack[Quantity]=[Sales]/[Price];

Quantity is the field whose value is changed – the formula after the “=” sign provides the calculation for the new quantity. As it is always advisable with respect to divisions to prevent a division by 0, it is recommendable to extend the expression as follows:

CalcBack[Quantity]=IIF([Price]=0,[Quantity],[Sales]/[Price]);

In this way, the quantity field is not changed if the price field is still 0 when a sales figure is entered. It is also possible to write back to various fields simultaneously – various CalcBack instructions are simply separated with semicolons.

Hint If a table and a writeable column are additionally selected in the column with the CalcBack expression, then this field will also be written simultaneously.

Formulae in CalcBack expressions shall be defined like in the expression field (see above).

Formatstrings

The following format strings can be used in the data definition

String	Description	Example
N0	Decimal number with thousands separator	1.235
N2	Decimal number with thousands separator and 2 decimal places	1.234,56
P0	Percentage value	123456%
P2	Percentage value with 2 decimal places	123456,00%
#	Decimal number without decimal places	1234
#.00	Decimal number with 2 decimal places	1234,56
#,#.00	Decimal number with thousands separator and two decimal places	1.234,56

COLUMN SETTINGS

COLUMN SETTINGS

In column settings, you define whether and how the predefined columns in the Aggregationsmask should be displayed.

You will find the following icons here:

	Creates a new matrix column
	Deletes the corresponding column
	Moves the relevant column forward in the sequence
	Moves the relevant column back in the sequence

This is where you can change the column names, make columns invisible, lock columns, format columns, define background colors and more.

Additionally, you can see the effects of your change in the preview (red marking).

If you click “apply” after you have made a change, the relevant change will be definitely applied.

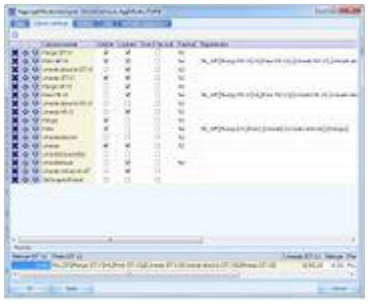


Figure 19: Aggregationsmask, column settings

NUMBER FORMATS

To show different number formats, please use the following syntax in “Format”:

String	Description	Example
N0	Decimal number with thousands separator	1.235
N2	Decimal number with thousands separator and 2 decimal places	1.234,56
P0	Percentage value	123456%
P2	Percentage value with 2 decimal places	123456,00%

#	Decimal number without decimal places	1234
#.00	Decimal number with 2 decimal places	1234,56
#,#.00	Decimal number with thousands separator and two decimal places	1.234,56

DEFINING BACKGROUND COLORS

By clicking color in the relevant column, you can change the background color of the column.



Figure 20: Aggregationsmask, Defining background colors

At first you enter the CoPlanner Color Picker – by double-clicking one of the eight fields for user-defined colors, you get to the “Define color” area. Choose your color from the color spectrum or by entering the color values.

OPTIONS

The following options are available:

“FILTER AREA VISIBLE” OPTION

Determines whether or not the filter area of an Aggregationsmask is visible.

“UPDATE RESULT IF FILTER HAS BEEN CHANGED” OPTION

Defines if the result should be updated automatically when a filter has been updated – alternatively, it can be reloaded by clicking “Update”. This setting is used for masks with large data volumes. In this way, the user can at first set all the filters of his/her choice and then update manually.

“SAVE BY BUTTON (NOT AUTOMATICALLY)” OPTION

As a general rule, Aggregationsmasks save and update after every input event. This setting makes sense so that aggregations can be represented in a matrix directly after the input. However, if the mask is large and features many cells, saving and/or updating after every input event may take too long and stand in the way of a smooth data acquisition. This option is available for these cases. Values are acquired, then the data are saved and the mask is updated when the save button of the mask is clicked.

“MEASURES ON THE HORIZONTAL/VERTICAL AXIS” SELECTION

As a default, the defined columns (measures) are represented on the horizontal axis. This selection can be used for a representation on the vertical axis.

“WAIT FOR 1ST LEVEL FORMULA CALCULATION” OPTION

With CoPlanner formulae, actions are executed after the saving of datasets. When a mask is saved, it is updated straight away – in order to be able to represent calculations straight away that are executed by formulae immediately after saving, this option can force the system to wait for the calculations of the 1st level (of the same table). In other words, there is a delay between saving and updating that corresponds to the time it takes to finish the first calculation level.

“ADJUST WIDTH OF COLUMN AFTER INPUT” OPTION

Makes a column bigger immediately after an input of values of large numbers or texts.

“KEEP LAST MASK SETTING” OPTION

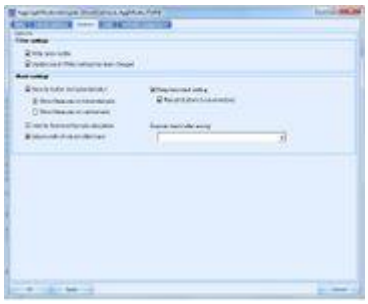
With this option, the user can be given the possibility of saving individual views of the mask for himself/herself. This can be done either automatically, i.e. every change of the mask layout is automatically retained without requiring a further action by the user. When the mask is next opened, it is just the way it was when the user last quit it. With the

“MANUAL (BUTTONS TO SAVE/RESTORE)” SUBOPTION,

the settings are not saved manually, but only upon the user’s express request. For this purpose, the user has separate buttons with which he/she can save the current mask setting, or if applicable with which he can perform a reset to the default setting of the Aggregationsmask.

“EXECUTE MACRO AFTER SAVING” OPTION

This can be used to execute a macro after (manual or automatic) saving of a mask.



LISTS

In the lists tab, macros, reports and options can be integrated in the Aggregationsmask.

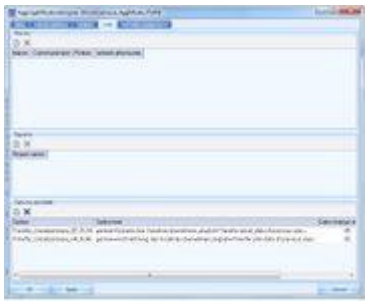


Figure 21: Aggregationsmask, Lists

MACRO

In order to integrate a macro, it must first have been created in the object administration. To create it, click on the “Create new” icon. Now you can select the required macro, define a command text and image. With the “Then update” option, the mask is updated after execution of the macro.

REPORT

Not available any more in Version 9

OPTIONS



Figure 22: Aggregationsmask, Lists

In the options area, you specify the functions of the wizard in the Aggregationsmask. In the option field, you can access all macros and import objects – therefore, all functionalities made possible by these objects are conceivable in the wizard.

In the following example, after the definition of the wizard in the lists area (see figure above), an import of actual data is performed in the Aggregationsmask.

After clicking the wizard icon, the data wizard is opened:



Figure 23: Aggregationsmask, Data - wizard

In the following window, you can choose from the options defined in the design area:



Figure 24: Aggregationsmask, Data - wizard

Please click “Finish” – the import will be executed.

The following options are still possible:

Data change available

Controls whether the dialog for data change is offered after the transfer has been performed..

Available in the context menu

Enables the integration of the transfer option in the context menu of the Aggregationsmask – instead of calling up the relevant transfer with the wizard, it can also be called up by right-clicking the cell to be filled and selecting the relevant option.

DEFINITION ASSIGNMENT

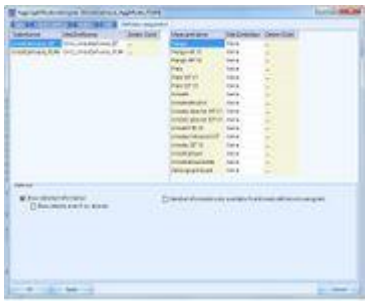


Figure 25: Aggregationsmask, Definition assignment

If you check “Show detailed information” in the Definition assignment tab and then change to the Aggregationsmask, in cells whose value consists of several datasets you see a small plus on a blue background.



Figure 26: Aggregationsmask, Definition assignment

If you now click on this small plus sign in the mask, a list of all datasets of which this one cell value consists will open.

The option “Show details even if no records” lets you jump to the detail mask even if no records are available. In this case, the jump icon is green rather than blue.

The option “Detailed dataset information only available if valid mask definition is assigned“ permits the opening of the detailed view only if a valid mask assignment has been made.

In principle, you can assign a definition to an entire table or to individual columns. If both options are set, the mask assigned to the column is used.

In the first assignment column, you can choose from all existing input and Aggregationsmask. If no mask is selected, but if jumping to the detailed dataset is permitted, a standard input mask definition (on the basis of the table) is used.

In the second assignment column, it is now also possible to use a line view (Analyze grid) created in the BI center.

When jumping to the detail dataset, all available filters and axis elements are automatically transferred to the filters of the target mask. Because of the possibility to jump in Aggregationsmasks as well, an overview mask can be used as the point of entry to many detail plans, for instance.

Info area

This option shows a second mask for information in the upper part. The mask of the info area is read only, the filter of the main mask will be used.

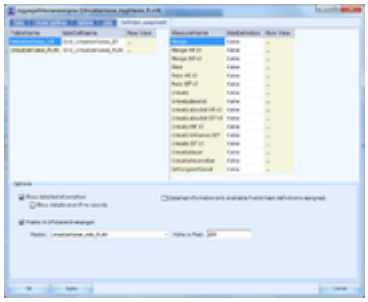


Figure 27: Aggregationsmask, Info area settings

If you activate this option, the combobox will be available and you can select a mask. In the field "Height in pixel" insert a value to define the height of the info area when opening.

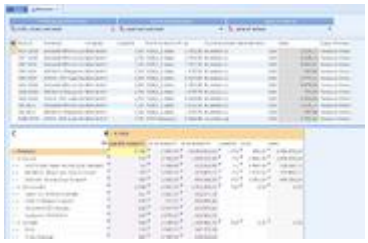


Figure 28: Aggregationsmask, Info area

An additional button will be displayed in the ribbon . Use this button to show/hide the info area.

MULTILINGUAL FUNCTION

In aggregation masks, filters and matrix columns may be given names in several languages. For this purpose, enter the name in the “Language” field in the following format:

English=Price;italiano=prezzo;

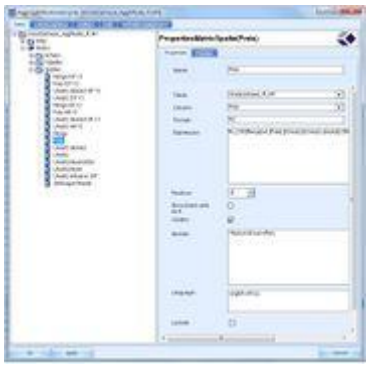


Figure 29: English name of columns in the Agg mask

Terms (Calcback, column formula) must be entered in the system language (German) and do not require any translation.

Irrespective of the language selected during the login, filters and columns will always be displayed in the system language in the preview. The language-specific names will only be used upon the opening of the mask.

TRANSFER-OPTIONS

In the Agg masks it is possible to have multilingual texts for the transfer options. For this purpose, please enter the text in the text field for the option in the following format:

German= Istwerte des Vorjahres übernehmen; English= english=Transfer actual data of previous year to actual plan;

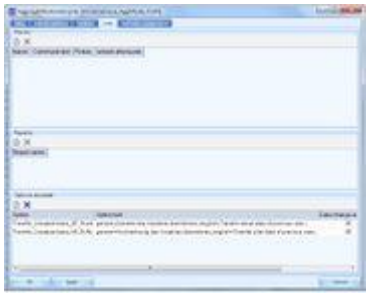


Figure 30: English name of transfer objects in the Agg mask

If no language syntax is contained in the message text, the same text is displayed in all languages.

MACROS

In the Agg mask it is possible to have texts for macros in several languages. For this purpose, enter the text in the “Command text” field in the following format:

german=Meldung;english=Message;

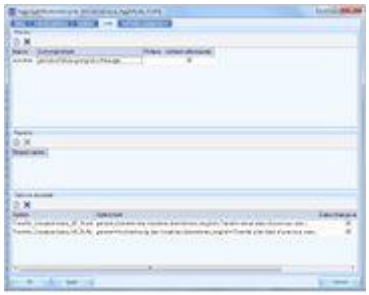


Figure 31: English name of macros in the Agg mask

If the message text does not contain any language syntax, the same text is displayed in all languages.