

How-To: Building Alternate Hierarchies



Laura Harris

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Create custom roll-ups using **Alternate Hierarchies** for efficient report creation.

Why use this feature?

An alternate hierarchy allows you to create alternate groupings of members from an existing data model to simplify mapping and allow for automatic updates to the data from your source system. In an alternate hierarchy, the same members can be repeated in both hierarchies, but the way in which you order or roll up your members can be revised via your alternate hierarchy. For example, if you need a breakdown by a particular set (e.g., projects in a particular month), you can create an alternate hierarchy to list the projects in the order of the month that they start.

(If you're unsure whether to use an alternate hierarchy or a calculated member to meet your project needs, **learn more here.**)

Vena Academy E-Learning

To learn more about setting up custom roll-ups with alternate hierarchies, take this interactive e-learning course.

Before you begin

In order to complete the steps outlined on this page, you will need at least **Modeler** access and the appropriate Application Permissions for the model you are updating.

If Data Permissions are set up in your environment, you will also need the appropriate permissions for the data that you are working with.


How to


Create an alternate hierarchy









To create an alternate hierarchy, you will need to add additional sibling and child members to your existing hierarchy of choice. In the example, below, we will be adding an alternate hierarchy to a data model used for tracking projects.

Create new Parents, Siblings, and Children

1. Log into vena.io and navigate to the **Modeler** tab.
2. Locate the data model where you want to create the alternate hierarchy and find the relevant member.
3. Right-click the **Parent member** and select **Add Sibling** from the drop-down menu.

<input type="checkbox"/>	Member Name	Alias
 <input type="checkbox"/>	▼ All Projects	
<input type="checkbox"/>	Project 1	
<input type="checkbox"/>	Project 2	
<input type="checkbox"/>	Project 3	
<input type="checkbox"/>	Project 4	
<input type="checkbox"/>	Project 5	



 Edit
 **Add Sibling**
 Add Child
 Preview Intersections
 Expand All
 Cut
 Add Calculated Member
 Sort Children by Name

4. Enter the name of your new member.

5. Select **+Add Member**.

Member Name
<div> <div>▼ All Projects</div> <div>Active/Inactive Projects</div> <div> <div>+ Add Member</div> <div>✕ Cancel</div> </div> </div>

6. Depending on how you want to organize your hierarchy, you can continue to add Siblings.

7. Once you've created your Siblings, right-click the sibling member you just created and select **Add Child**.

Member Name	Alias
Project 1	Edit
Project 2	Add Sibling
Project 3	Add Child
Project 4	Preview Intersections
Project 5	Expand All
	Cut
	Add Calculated Member
	Sort Children by Name
	Sort Children by Alias

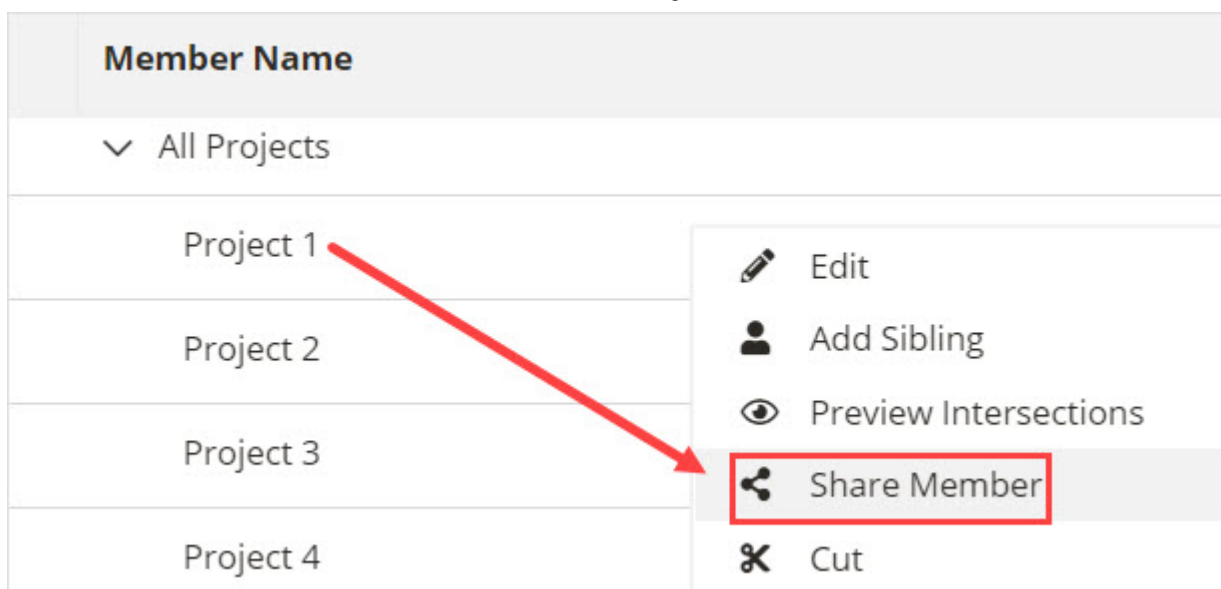
8. Name your new member and select **+Add Member**.

<div> <div><input type="checkbox"/></div> <div>▼ Active/Inactive Projects - Alt Hierarchy</div> </div> <div> <div>Active Projects</div> <div> <div>+ Add Member</div> <div>✕ Cancel</div> </div> </div>

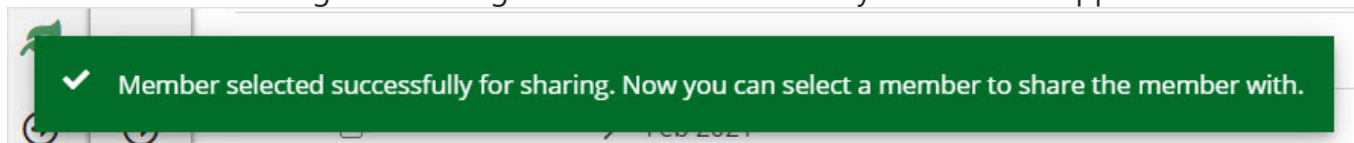
9. Continue until you've finished adding all your child members. Once you've added your children, the next step is to share your members to the alternate hierarchy.

Share Members

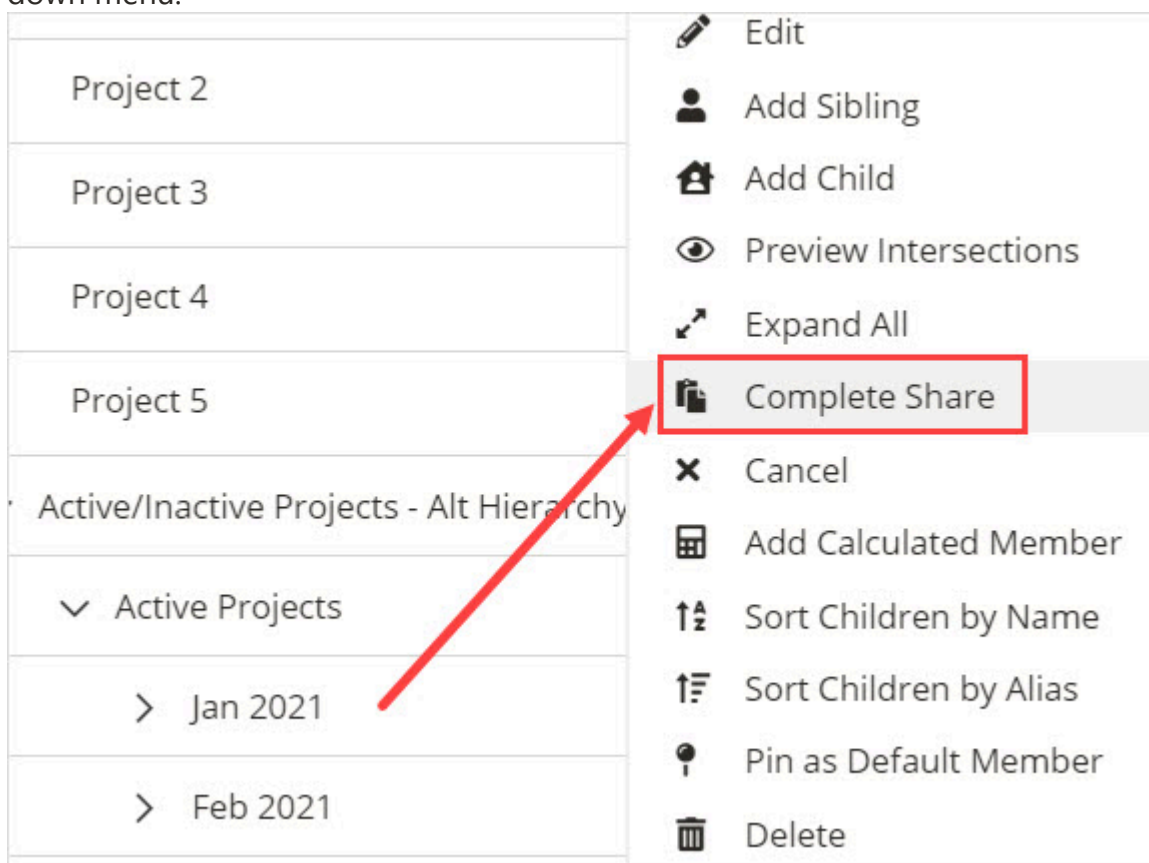
1. To share members to an alternate hierarchy, right-click on a member (or select the vertical ellipses beside the member) and select **Share Member** from the drop-down menu.




2. A confirmation message confirming that the member is ready to share will appear.



3. Right-click the Child member you want to share to and select **Complete Share** from the drop-down menu.



4. Confirm that the member has been successfully shared when the  symbol appears next to both the original member and the shared member.

Member Name
Project 1
Active/Inactive Projects - Alt Hierarchy
Active Projects
Jan 2021
Project 1

5. Once you've finished sharing all your members, your alternate hierarchy is ready for use.

<input type="checkbox"/>	Member Name
<input type="checkbox"/>	▼ All Projects
<input type="checkbox"/>	Project 1
<input type="checkbox"/>	Project 2
<input type="checkbox"/>	Project 3
<input type="checkbox"/>	Project 4
<input type="checkbox"/>	Project 5
<input type="checkbox"/>	▼ Active/Inactive Projects - Alt Hierarchy
<input type="checkbox"/>	▼ Active Projects
<input type="checkbox"/>	▼ Jan 2021
<input type="checkbox"/>	Project 4
<input type="checkbox"/>	Project 1
<input type="checkbox"/>	▼ Feb 2021
<input type="checkbox"/>	Project 5
<input type="checkbox"/>	Project 2
<input type="checkbox"/>	▼ Inactive Projects
<input type="checkbox"/>	Project 3

Original Hierarchy

Alternate Hierarchy