

How-To: Building Alternate Hierarchies



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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.

The screenshot shows a data grid with columns for 'Member Name' and 'Alias'. The 'Member Name' column contains entries: 'All Projects' (with a dropdown arrow), 'Project 1', 'Project 2', 'Project 3', 'Project 4', and 'Project 5'. A red arrow points from the 'All Projects' entry to a context menu. The context menu is titled 'Edit' and includes the following options: 'Edit' (with a pencil icon), 'Add Sibling' (highlighted with a red box and a person icon), 'Add Child' (with a house icon), 'Preview Intersections' (with an eye icon), 'Expand All' (with a double arrow icon), 'Cut' (with a cross icon), 'Add Calculated Member' (with a calculator icon), and 'Sort Children by Name' (with a sort icon).

	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	

4. Enter the name of your new member.

5. Select **+Add Member**.

Member Name

▼ All Projects

Active/Inactive Projects

+ Add Member **Cancel**

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

- Project 1
- Project 2
- Project 3
- Project 4
- Project 5
- ▼ Active/Inactive Projects - Alt Hierarchy

Alias

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

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

▼ Active/Inactive Projects - Alt Hierarchy

Active Projects

+ Add Member **Cancel**

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.

Member Name

- ▼ All Projects
- Project 1
- Project 2
- Project 3
- Project 4

A context menu is open on the right side of the screen, listing several options:

- Edit
- Add Sibling
- Preview Intersections
- Share Member** (highlighted with a red box)
- Cut

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

The notification bar displays the message: "✓ Member selected successfully for sharing. Now you can select a member to share the member with."

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

A context menu is open on the right side of the screen, listing several options:

- Edit
- Add Sibling
- Add Child
- Preview Intersections
- Expand All
- Complete Share** (highlighted with a red box)
- Cancel
- Add Calculated Member
- Sort Children by Name
- Sort Children by Alias
- Pin as Default Member
- Delete

The list of items on the left includes:

- Project 2
- Project 3
- Project 4
- Project 5
- Active/Inactive Projects - Alt Hierarchy
 - ▼ Active Projects
 - > Jan 2021
 - > Feb 2021

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.

Member Name
All Projects
Project 1
Project 2
Project 3
Project 4
Project 5
▼ Active/Inactive Projects - Alt Hierarchy
▼ Active Projects
▼ Jan 2021
Project 4
Project 1
▼ Feb 2021
Project 5
Project 2
▼ Inactive Projects
Project 3

Original Hierarchy

Alternate Hierarchy