Best Practices for Navigating Between Dossiers and Chapters/Pages in MicroStrategy

# Objective

This document outlines the best methods for navigating between dossiers and chapters/pages in MicroStrategy, based on whether filter selections need to be passed. It compares two approaches—using the HTML container with URL API and the Create Link feature—each with its benefits and limitations.

# Use Cases

## Use Case 1: Navigate without Passing Filter Selections

If your objective is to navigate to other dossiers or chapters/pages within the same dossier without passing filter selections from filters and selectors, use an HTML container with embedded URL API.

### Benefits:

• Requires less manual UI formatting, as the HTML container allows for direct embedding of URLs.  
• The URL API can be customized to link directly to other dossiers or pages without transferring any current filter settings.

### Steps to Implement:

1. Add an HTML container to your dossier layout.  
2. Embed the target dossier or chapter URL using the MicroStrategy URL API.

### Limitations:

• This approach doesn’t pass filter or selector values between pages.  
• Manual URL customization is required for linking to specific pages, but it simplifies navigation when no filters are involved.

• The URL API using an HTML container works in some cases but is inconsistent, as it may not function correctly in others.

## Use Case 2: Navigate with Passing Filter Selections

If you need to navigate between dossiers or chapters/pages and want to pass current filter and selector selections, use the built-in Create Link feature.

### Benefits:

• Passes all filter selections to the target dossier or chapter, ensuring seamless user experience.  
• Allows navigation with filters intact, making it more dynamic for users who rely on specific data filtering.

### Steps to Implement:

1. Insert a text box in the navigation panel for each chapter or dossier you want to link.  
2. Use the 'Create Link' option to select the target dossier or chapter and check the box to 'Pass all current filter selections'.

### Limitations:

• Requires significant manual formatting, such as creating and positioning text boxes, and configuring each link manually.  
• More time-consuming to set up, especially when dealing with many chapters or dossiers.

# General Approach

1. Create a Navigation Panel: Use a stack container in the dossier layout as the navigation hub. For Use Case 1, add HTML containers; for Use Case 2, add text boxes linked via Create Link.  
2. Customize the Panel: Design and format the navigation panel for easy interaction, and ensure clear labeling of each link or button to indicate the target dossier, chapter, or page.

# Challenges and Limitations

## HTML Container with URL API:

• Less UI formatting is required, but this method does not pass filter selections, limiting its dynamic capability.  
• Manually configured URLs may become cumbersome when managing complex navigation paths.  
• The URL API using an HTML container works in some cases but is inconsistent, as it may not function correctly in others.

## Create Link Method:

• While it supports passing filters, it requires more manual formatting and maintenance, especially when managing large dossiers or frequent updates.

# Future Vendor Update:

MicroStrategy has acknowledged some of the current limitations with custom navigation using the URL API and manual formatting. They plan to address these issues in the December 2024 release, improving the consistency of navigation behavior and reducing manual effort.

# Conclusion

For navigating without passing filters, the HTML container with URL API is recommended for simplicity and minimal UI formatting. For scenarios requiring the passing of filters, the Create Link feature is the preferred option, despite the additional manual setup. Both methods fulfill their respective functional needs, with upcoming vendor updates expected to enhance these processes further.