What's New In Stratum 7.2?

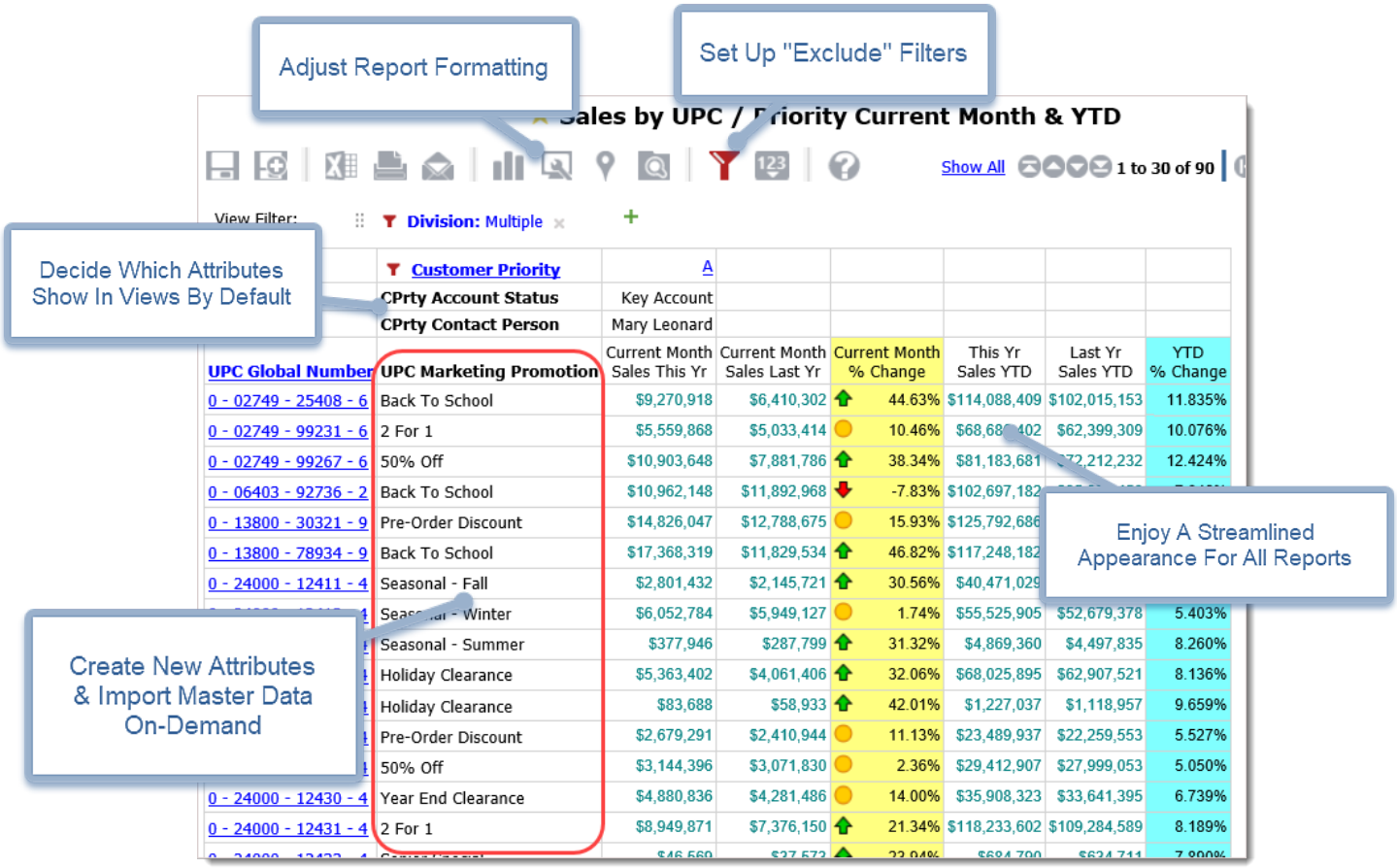
Stratum Viewer, Stratum Connector, & User Controlled Atttributes

More User Control Over Stratum Data & Report Design

Stratum product offerings and the Stratum Data Hub support users in their analyst and citizen data scientist roles. Our products meet the varied reporting and visualization requirements of content consumers while guaranteeing a single version of the truth. Our hub reliably manages your corporate and user-generated data. Version 7.2 Stratum features our latest tool in that product line – **User Controlled Attributes**.

User Controlled Attributes gives you the ability to define and populate master data that supplements existing core Stratum data. Add attributes on-demand to describe Stratum dimensions and support new levels of data summarization. Show the promotional activity tied to each UPC/SKU by adding a Marketing Promotion attribute to that dimension. Create a Customer Parent roll-up for Customer Sold-To's as an avenue for swiftly linking like customers together. Use the Master Data Import feature to get your data into the Stratum Data Hub.

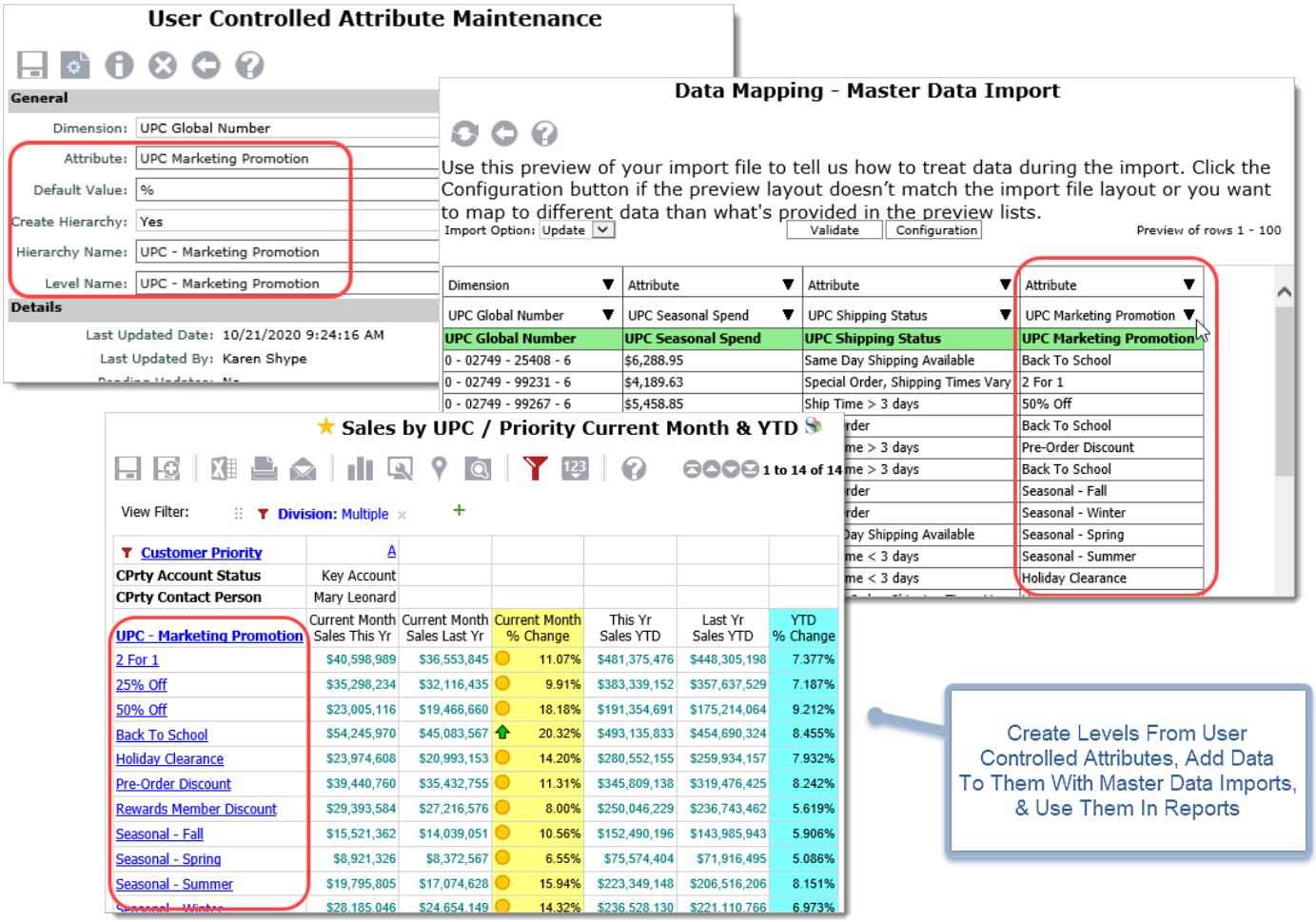
The design of reports containing your data has been upgraded. Customize Stratum reports with enhanced formatting options— all reports have a more streamlined look that helps data be the focus and that users can adjust if needed. More flexible filter options plus new shortcuts for editing measure items and sharing reports further enhance the Stratum user experience. New admin tools include a central spot for determining which attributes get automatically included in views.



Upgrading to 7.2 gives you more independence around adding new master data to Stratum and creating new levels of summarization, with an emphasis on reducing the need for IT assistance and Excel data manipulation while carrying out those tasks. Watch a video introduction to Stratum 7.2 here. Contact us at info@silvon.com to arrange your upgrade.

Add New Attributes & Data Summarizations

User Controlled Attributes are a major addition to Stratum.Viewer. The Add attributes on-demand feature lets you add new attributes that describe Stratum dimensions and support new levels of data summarization – as done in the example below. A new attribute for the UPC Global Number dimension had a hierarchy created for it, which is then used in the rows of a YTD sales report. Master Data Import is used to update those attributes with current data and is a quick way to add new dimension key values into the Stratum Data Hub. Security built into the Data Hub maintains the integrity of attributes originating from corporate business systems while keeping track of the separate incoming streams of data for User Controlled Attributes.



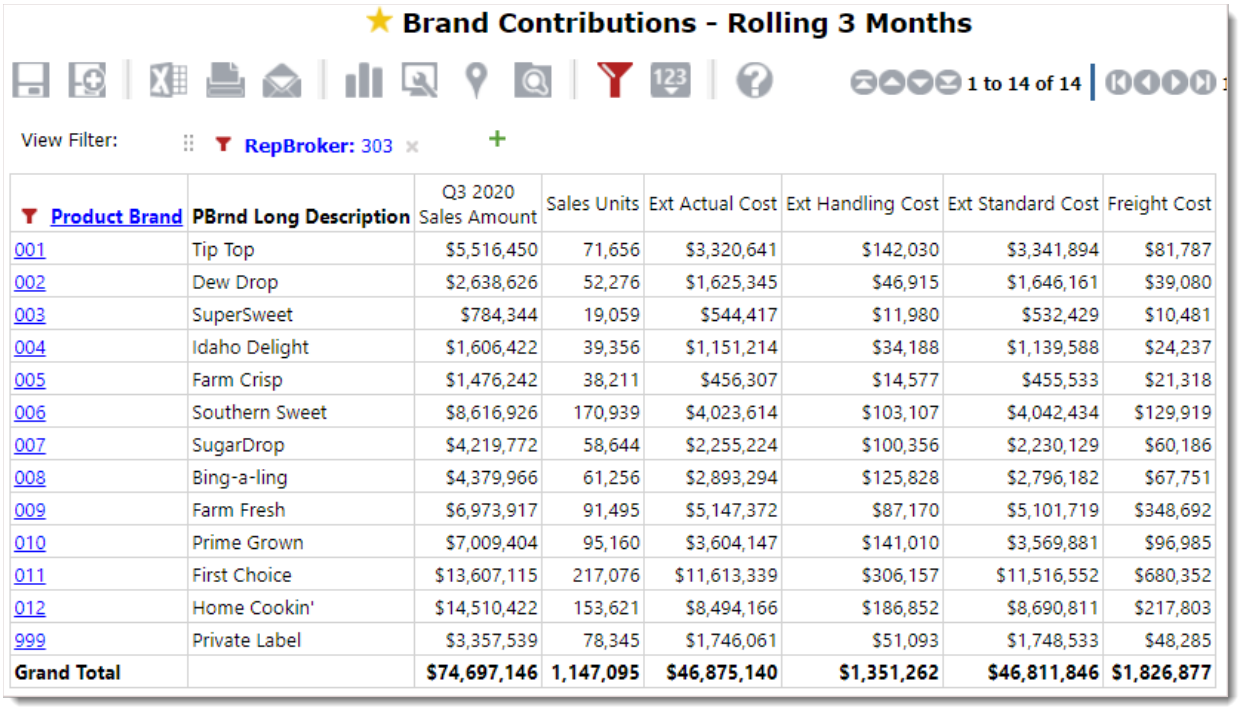
Here's what can you do with User Controlled Attributes:

- **Add Attributes To Compliment Corporate Data** – Attributes provide additional descriptive details about your dimensions. Examples are Marketing Promotions and Product Groupings that are controlled and managed outside of your corporate systems.
- **Import Master Data Anytime** – Update or replace data for User Controlled Attributes. In seconds, import master data from Excel spreadsheets. Do so without IT assistance and without waiting for the next scheduled database update.
- **Define New Data Summarizations** – Group data into new analytical categories by creating virtual hierarchies from User Controlled Attributes. This makes the attribute available as a level to use in rows / columns of Viewer reports. See data summarized by attributes via their virtual levels. Use them the same as all other Stratum levels. Drill, filter, build calculations, and more. Master data imported for attributes will populate their virtual hierarchies.
- **Add New Dimension Key Values** – Master Data Import functionality enhances Budget and Forecasting tasks. Add new key values for items you need to plan on that do not exist yet in corporate business systems. Is there a new Product under development that you need to account for in next year's plan? Include rows with dimension key values in the Excel file for a Master Data Import. The import adds the new key values to Stratum. Then use Viewer's Planning or Data Import to populate the items with budget / forecast measure data.

Note: User Controlled Attribute Maintenance and Master Data Import are available only for Stratum.Viewer implementations where Stratum.Server is running on a Windows server. Master Data Import also requires a valid Viewer Planning application license. Contact us at info@silvon.com for info about moving your Stratum.Server from IBM i to Windows or to acquire Planning for Viewer.

Refine Report Appearance With Grid Formatting Tools

Stratum reports has been **refreshed with a simplified design and color palette that puts the focus on your data**. A plain background, lighter border colors, and removal of dark grey row coloring helps data stand out more on screen. Administrators and all users have options to customize this standard report look.



★ Brand Contributions - Rolling 3 Months

1 to 14 of 14

View Filter: RepBroker: 303

Product Brand	PBrnd Long Description	Q3 2020 Sales Amount	Sales Units	Ext Actual Cost	Ext Handling Cost	Ext Standard Cost	Freight Cost
001	Tip Top	$5,516,450	71,656	$3,320,641	$142,030	$3,341,894	$81,787
002	Dew Drop	$2,638,626	52,276	$1,625,345	$46,915	$1,646,161	$39,080
003	SuperSweet	$784,344	19,059	$544,417	$11,980	$532,429	$10,481
004	Idaho Delight	$1,606,422	39,356	$1,151,214	$34,188	$1,139,588	$24,237
005	Farm Crisp	$1,476,242	38,211	$456,307	$14,577	$455,533	$21,318
006	Southern Sweet	$8,616,926	170,939	$4,023,614	$103,107	$4,042,434	$129,919
007	SugarDrop	$4,219,772	58,644	$2,255,224	$100,356	$2,230,129	$60,186
008	Bing-a-ling	$4,379,966	61,256	$2,893,294	$125,828	$2,796,182	$67,751
009	Farm Fresh	$6,973,917	91,495	$5,147,372	$87,170	$5,101,719	$348,692
010	Prime Grown	$7,009,404	95,160	$3,604,147	$141,010	$3,569,881	$96,985
011	First Choice	$13,607,115	217,076	$11,613,339	$306,157	$11,516,552	$680,352
012	Home Cookin'	$14,510,422	153,621	$8,494,166	$186,852	$8,690,811	$217,803
999	Private Label	$3,357,539	78,345	$1,746,061	$51,093	$1,748,533	$48,285
Grand Total		**$74,697,146**	**1,147,095**	**$46,875,140**	**$1,351,262**	**$46,811,846**	**$1,826,877**

Change the report formatting for your individual views by using the new Grid Format tab of the Display Options window. Fonts and Total Row fill color have been customized in the following example.

★ My Brand Contributions - Rolling 3 Months

1 to 14 of 14 | 1 to 6 of

View Filter: RepBroker: 303

Product Brand	PBrnd Long Description	Q3 2020 Sales Amount	Sales Units	Ext Actual Cost	Ext Handling Cost	Ext Standard Cost	Freight Cost
001	Tip Top	$5,516,450	71,656	$3,320,641	$142,030	$3,341,894	$81,787
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003	SuperSweet	$784,344	19,059				
004	Idaho Delight	$1,606,422	39,356				
005	Farm Crisp	$1,476,242	38,21				
006	Southern Sweet	$8,616,926	170,93				
007	SugarDrop	$4,219,772	58,64				
008	Bing-a-ling	$4,379,966	61,25				
009	Farm Fresh	$6,973,917	91,49				
010	Prime Grown	$7,009,404	95,16				
011	First Choice	$13,607,115	217,07				
012	Home Cookin'	$14,510,422	153,62				
999	Private Label	$3,357,539	78,34				
Grand Total		$74,697,146	1,147,09				

DISPLAY OPTIONS

General | Grid Format

Use Viewer Defaults:

Base Color:

Alternating Row Color:

Total Row Color:

Border Color:

Data Captions Font: Segoe UI Semibold Change 12

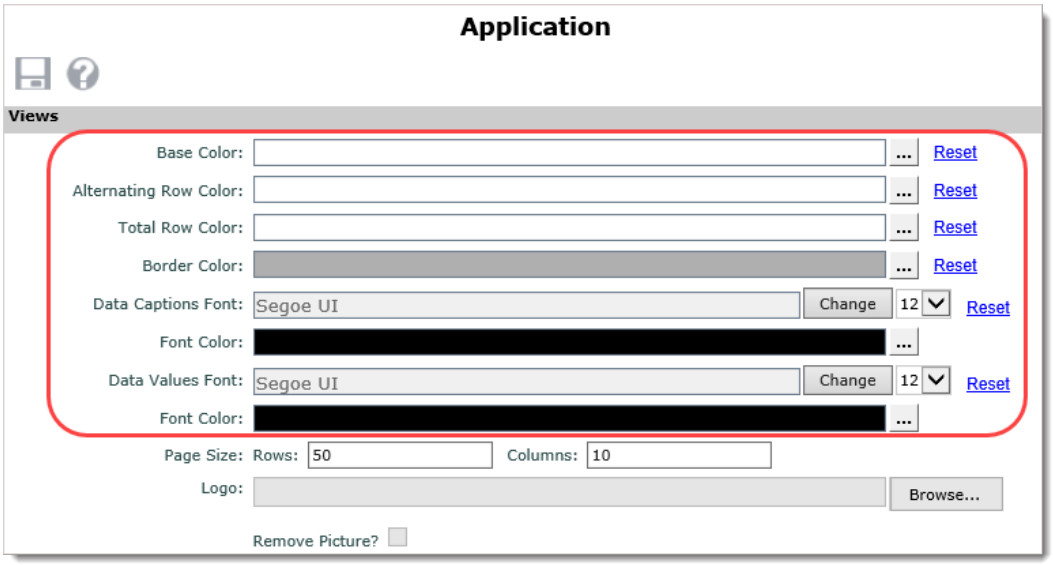
Font Color:

Data Values Font: Segoe UI Light Change 11

Font Color:

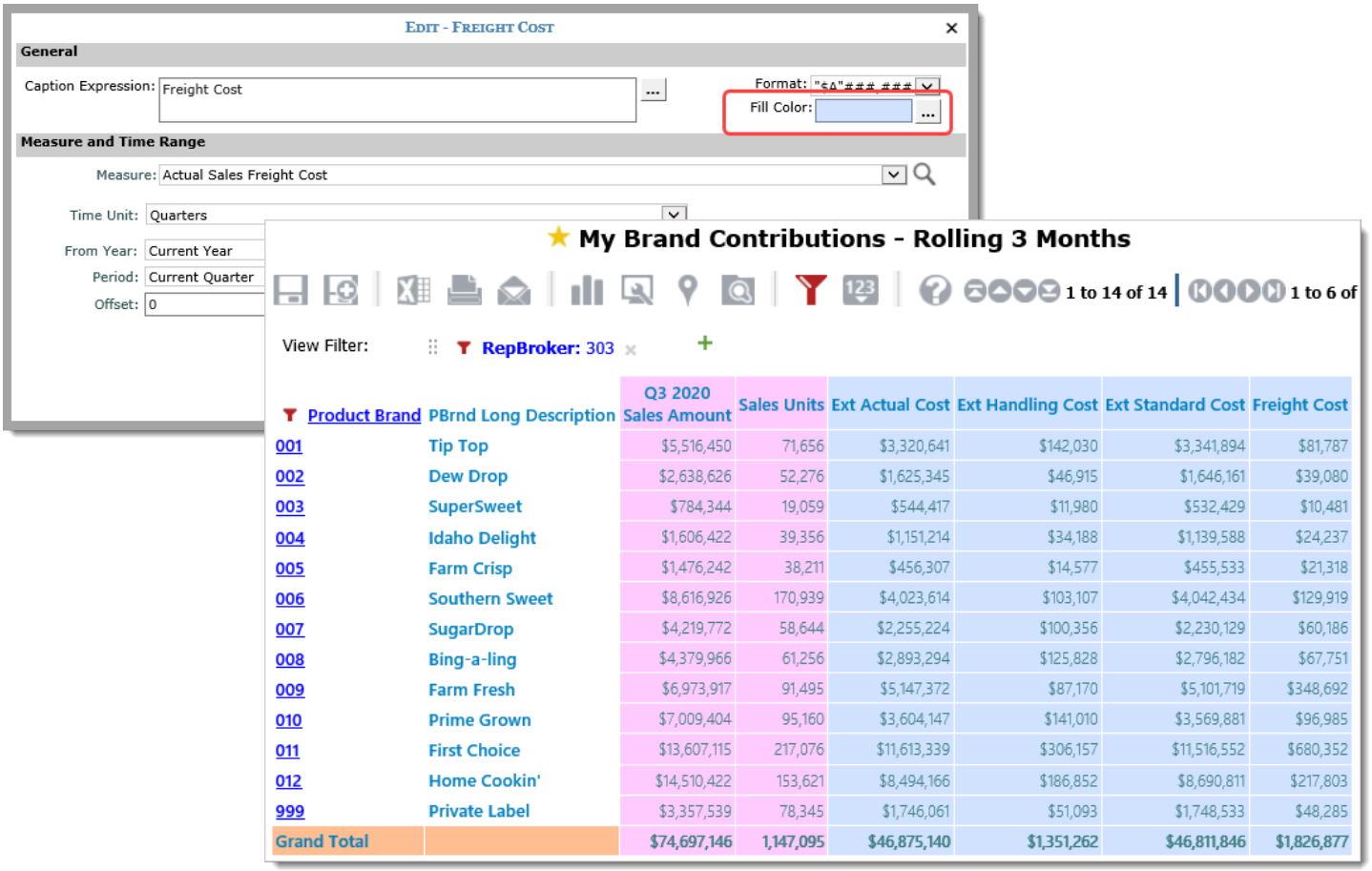
OK Cancel

Administrators **control the default report format in the Views section of Application settings**. These setting are useful when you want to create a look that reflects company branding schemes or baseline design to give users a consistent starting point for report formatting. Enhance that look with existing functionality that displays an image such as a company logo at the top of all reports. The format set up here by Administrators gets assigned to all reports automatically except those whose formatting has been customized by users.



Highlight Key Report Columns With Fill Colors

Columns containing measure items, levels, or attributes can be assigned a unique fill color to help them stand out in your reports. **Assign a fill color to draw attention to a particular column and set it apart from the rest of a report**. The next example shows a fill color applied to the Sales Amount and Units columns, and a different fill color is used for the Cost columns to help set the different types of data apart from each other.



Product Brand	PBrnd Long Description	Q3 2020 Sales Amount	Sales Units	Ext Actual Cost	Ext Handling Cost	Ext Standard Cost	Freight Cost
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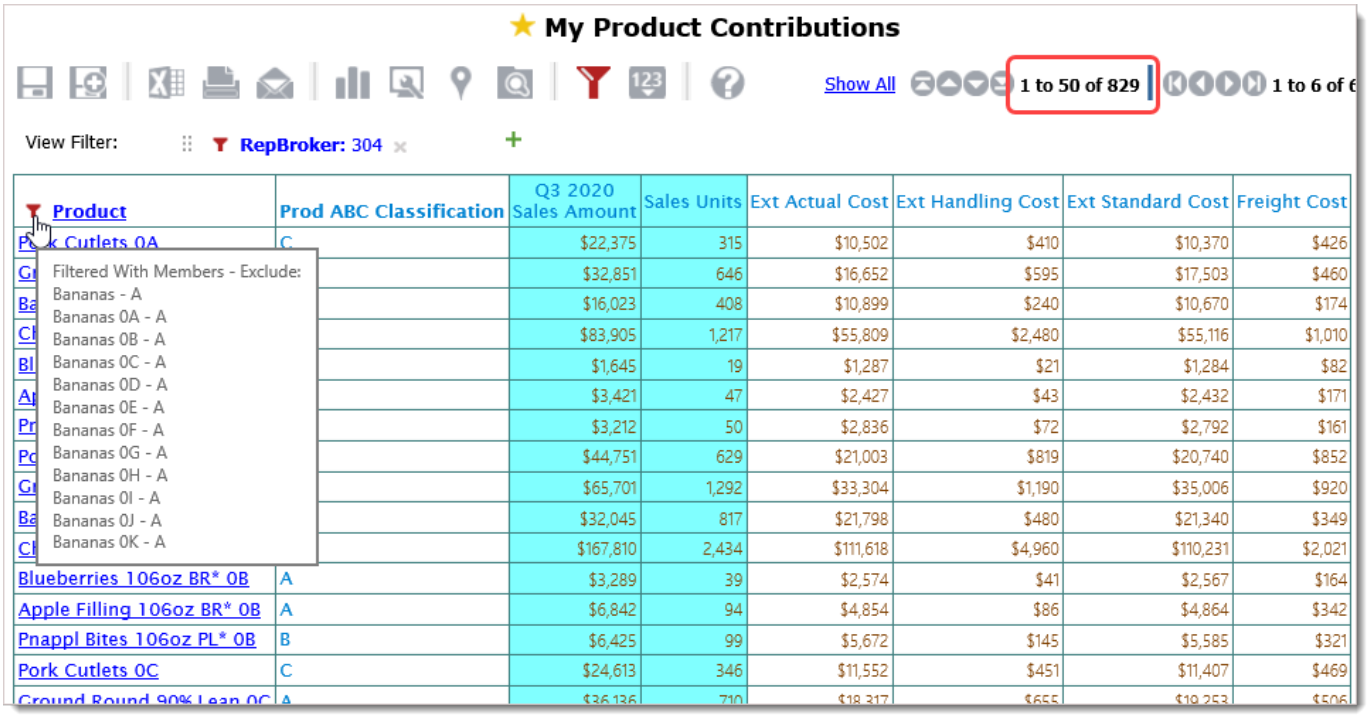
Grand Total		$74,697,146	1,147,095	$46,875,140	$1,351,262	$46,811,846	$1,826,877

Exclude Sets of Data From Reports With New Filter Option

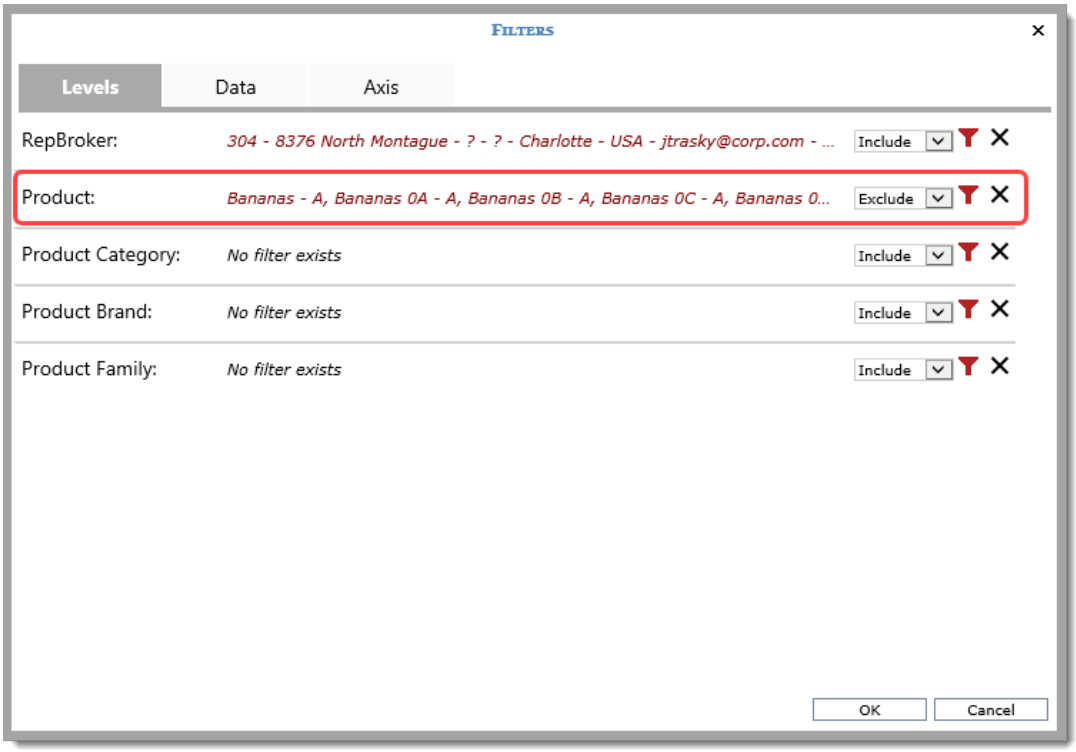
A new property lets you **determine how Viewer treats level filter criteria**. Tell Viewer to "Include" or "Exclude" the members of the filter for a level. The default is Include, which means the level is filtered to only show members designated by the filter criteria. The new Exclude option lets you see all members of a level **except** those designated by the filter. Toggling back and forth between the two filter types gives you a different perspective on the data being analyzed.

Here is an Exclude filter applied to the Product level. There were 13 members selected for the filter. Results shown all Products *except* those 13 members.

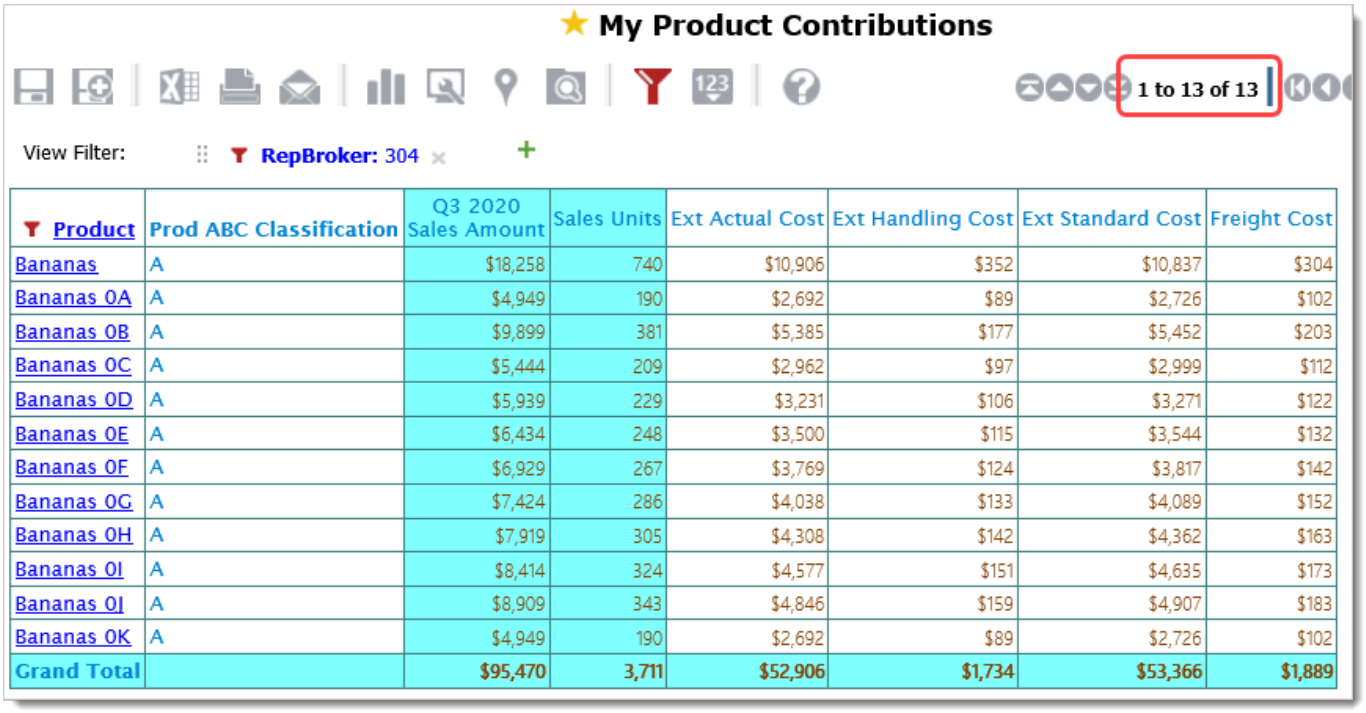


Product	Prod ABC Classification	Q3 2020 Sales Amount	Sales Units	Ext Actual Cost	Ext Handling Cost	Ext Standard Cost	Freight Cost
Pork Cutlets 0A	C	$22,375	315	$10,502	$410	$10,370	$426
Gr		$32,851	646	$16,652	$595	$17,503	$460
Ba		$16,023	408	$10,899	$240	$10,670	$174
Ch		$83,905	1,217	$55,809	$2,480	$55,116	$1,010
Bl		$1,645	19	$1,287	$21	$1,284	$82
An		$3,421	47	$2,427	$43	$2,432	$171
Pr		$3,212	50	$2,836	$72	$2,792	$161
Po		$44,751	629	$21,003	$819	$20,740	$852
Gr		$65,701	1,292	$33,304	$1,190	$35,006	$920
Ba		$32,045	817	$21,798	$480	$21,340	$349
Ch		$167,810	2,434	$111,618	$4,960	$110,231	$2,021
Blueberries 106oz BR* 0B	A	$3,289	39	$2,574	$41	$2,567	$164
Apple Filling 106oz BR* 0B	A	$6,842	94	$4,854	$86	$4,864	$342
Pnappl Bites 106oz PL* 0B	B	$6,425	99	$5,672	$145	$5,585	$321
Pork Cutlets 0C	C	$24,613	346	$11,552	$451	$11,407	$469
Ground Round 90% Lean 0C	A	$36,136	710	$18,317	$655	$19,253	$506

Shortcuts for controlling the Include/Exclude option are in the Filters window and other view spots where filters are controlled such as the View Prompt window for views defined with parameters.



Here is the view after the filter was changed to an Include type. Results show only the 13 Products specified by the filter.



My Product Contributions

1 to 13 of 13

View Filter: RepBroker: 304

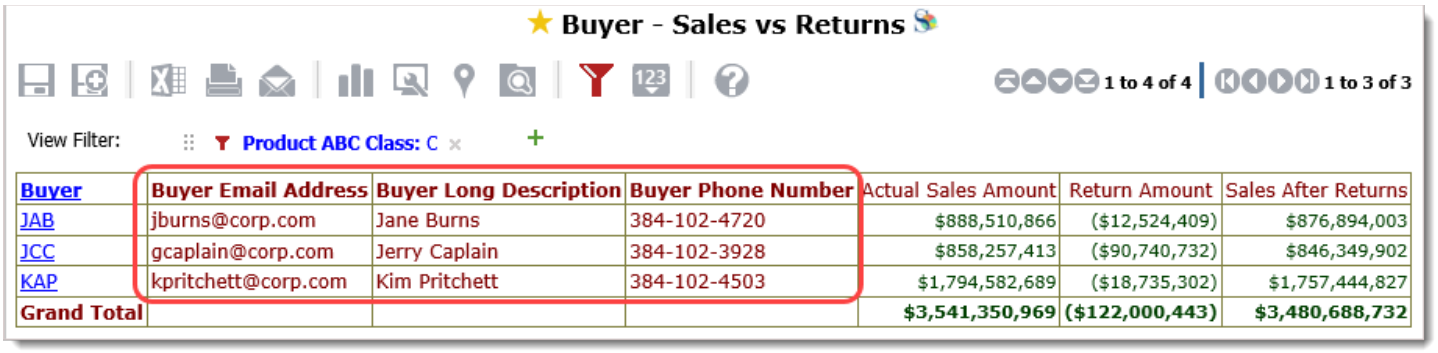
Product	Prod ABC Classification	Q3 2020 Sales Amount	Sales Units	Ext Actual Cost	Ext Handling Cost	Ext Standard Cost	Freight Cost
Bananas	A	$18,258	740	$10,906	$352	$10,837	$304
Bananas 0A	A	$4,949	190	$2,692	$89	$2,726	$102
Bananas 0B	A	$9,899	381	$5,385	$177	$5,452	$203
Bananas 0C	A	$5,444	209	$2,962	$97	$2,999	$112
Bananas 0D	A	$5,939	229	$3,231	$106	$3,271	$122
Bananas 0E	A	$6,434	248	$3,500	$115	$3,544	$132
Bananas 0F	A	$6,929	267	$3,769	$124	$3,817	$142
Bananas 0G	A	$7,424	286	$4,038	$133	$4,089	$152
Bananas 0H	A	$7,919	305	$4,308	$142	$4,362	$163
Bananas 0I	A	$8,414	324	$4,577	$151	$4,635	$173
Bananas 0I	A	$8,909	343	$4,846	$159	$4,907	$183
Bananas 0K	A	$4,949	190	$2,692	$89	$2,726	$102
Grand Total		**$95,470**	**3,711**	**$52,906**	**$1,734**	**$53,366**	**$1,889**

Pick Attributes To Show In Reports By Default & Control General Access

A redesigned Dimensions window gives Administrators more control over attributes used in reports.

- **Attributes can be designated to be displayed in views by default anytime their level gets added to a view.** This is helpful when you want users to see a few extra details about a level. It saves users time by not having to add the attributes on their own each time they add the level to a view.
- **Individual attributes can be deselected to take them out of circulation. And then added back later if they are needed again.** The selection box next to attributes controls if attributes will be available for users to add to views. Deselecting an attribute's check box means it will not be available to use in any new views created after that time. Use this feature for attributes that are not yet ready to be rolled out to your users. Enable them when they are ready for use.

This example uses the Buyer level. The Administrator selected three Buyer attributes to get added to views by default whenever that level gets used in a view. They are displayed in the following view. Users can adjust their views to display more or less of the available Buyer attributes.



Buyer - Sales vs Returns

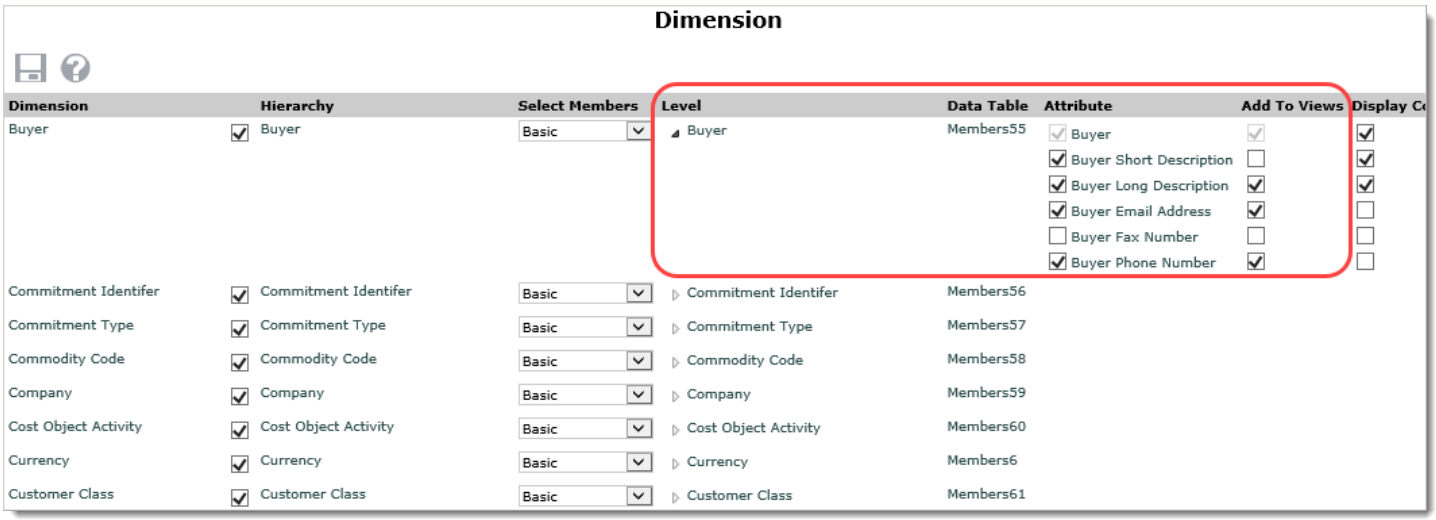
1 to 4 of 4 | 1 to 3 of 3

View Filter: Product ABC Class: C

Buyer	Buyer Email Address	Buyer Long Description	Buyer Phone Number	Actual Sales Amount	Return Amount	Sales After Returns
JAB	jburns@corp.com	Jane Burns	384-102-4720	$888,510,866	($12,524,409)	$876,894,003
JCC	gcaplain@corp.com	Jerry Caplain	384-102-3928	$858,257,413	($90,740,732)	$846,349,902
KAP	kpritchett@corp.com	Kim Pritchett	384-102-4503	$1,794,582,689	($18,735,302)	$1,757,444,827
Grand Total				**$3,541,350,969**	**($122,000,443)**	**$3,480,688,732**

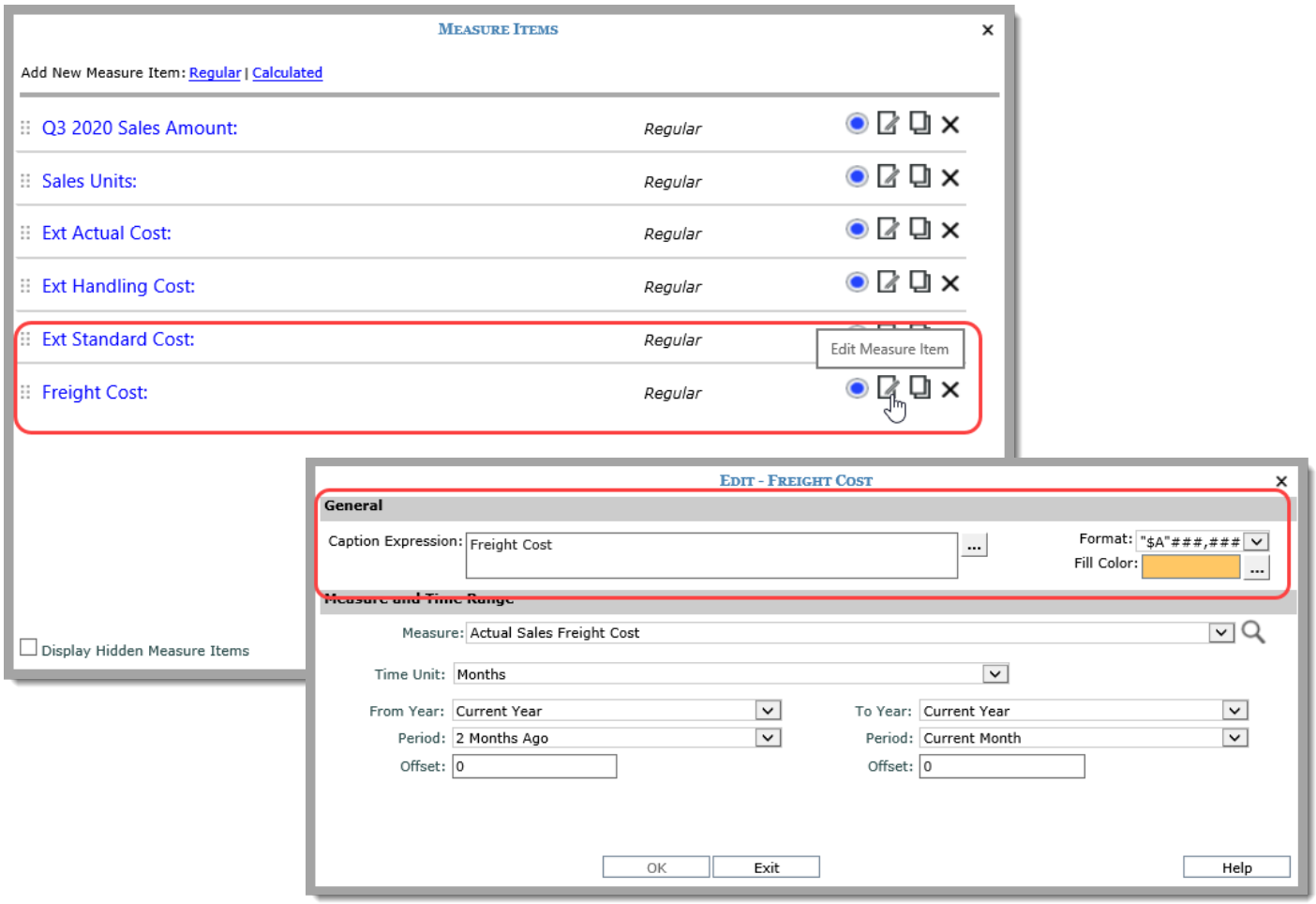
Here are attribute settings in the Dimension window for Buyer.

- The attributes selected in the Add To Views column are the ones that got added to our example view by default.
- Selections in the Attribute column show that Buyer Fax Number is not selected, which means that attribute is not available to use in views.



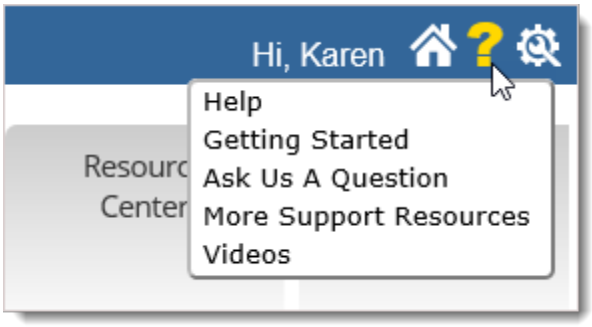
Quick Access Tools For Editing Key Measure Item Properties

Stratum has expanded some shortcuts previously introduced for calculated measure items to other types of measure items. **When you edit a regular measure item from a view's Measures window, you also can edit its caption, format string, and Fill Color.** Save time by controlling frequently used properties from one spot while also adjusting the underlying measure or, if applicable, the time ranges for the measure item. Apply all changes at once.



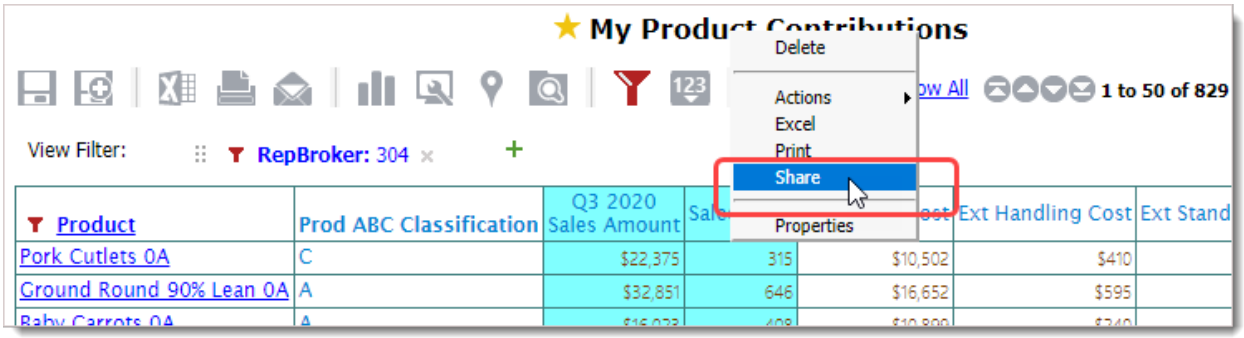
Shortcuts To Customer Support Resources

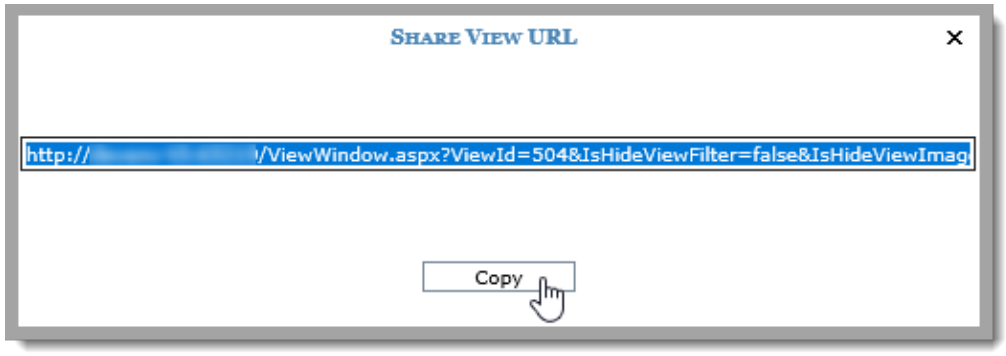
Use the new Help button in the top panel if you need to ask us a support question or find self-service support resources like online help and CustomerNet (includes product announcements and admin resources). **Direct links to resources and support email save you time finding the answers or tips you need while using Viewer.**



Shortcut For Sharing Reports

Shortcuts for sharing reports have been renamed to "Share" and added to a new spot in Viewer. **Copying the URL for sharing has been made easier.** Right-click a view name while using it or right-click its name in the left panel, then click Share to open a Share View URL window.





Recap Of Viewer 7.X And 6.X Releases

Version	New & Updated Features
7.2 Dec. 2020	***New:*** User Controlled Attribute functionality for defining and populating master data on-demand to supplement existing core Stratum data. Grid formatting options to change the style of reports including their border color, total rows color, fonts, and column fill color. Administrator options to control the availability of attributes in views and which attributes display in views by default when their levels get used in views. ***Enhanced:*** Filtering offers a choice to include or exclude the designated filter set – see only the designated members or see all members except the designated members. Shortcuts for editing captions, format string, and fill color are available when editing any type of measure item from the Measures window. Shortcuts to Customer Support resources have been added to a new button in the top toolbar. The process for copying view URL's to share has been streamlined.
7.1.2 Aug 2020 *(7.1.1 in April 2020 & 7.1 in Nov. 2019)*	***What's New PDF*** – New features give you straight forward tools for controlling and accessing Stratum data. See the list below. Other updates: Shortcut to search all views from Favorite & Recently Used Views window. Shortcuts for setting up calculated measure item captions. Option to exclude the View Details section from emailed views and Excel exports. Reorder views in Action-generated emails and Excel files related to Actions. More icons to choose from when assigning images to Conditional Formats. Custom logos to use in distinguishing between multiple Viewer environments. Admin tool for tracking who is actively using Viewer. New set of Getting Started videos that aid users in learning to use Viewer. • **Data Import** – Bring budgets, market trends, plans, and other outside data that compliments enterprise data into the Stratum Data Hub from user-curated Excel spreadsheets. Immediately see imported data in Stratum for centralized analysis with the rest of your business data. Watch Video. • **StratumLink** – A web-based ETL for Stratum power users to pull high volumes of additional core business data into the hub from complex data sources (ERP, CRM, custom databases, IoT systems, cloud sources). See newly loaded data shows in context with other enterprise data. Watch Video. • **Stratum Dashboards** – All-in-one resources for highlighting complimentary Stratum reports, charts, and outside content. Leverage existing content in new ways that give broader insights into business performance. Drill to other reports or link to other resources from items within a dashboard. Learn More. Interface and online updates in Stratum 7.1.1. See What's New In Dashboards. • **Stratum Power BI Connector** – A bridge between Microsoft Power BI and your Stratum data. Stratum Power BI Connector provides Stratum Data Hub access to your Power BI Users while capitalizing on your existing Stratum reports and the hub's security model. Learn More.
7.0 Jan. 2019	***What's New PDF -*** Data Copy for users to populate measures with data from existing measures (requires Planning license and implementation where Stratum Server is on a Windows server). Business planners will find Data Copy to be a great starting point for populating forecasts or budgets.
6.9 Aug. 2018	***What's New Video*** *and* ***What's New PDF -*** Copy measure items to create new ones. Central spot for controlling all measure items in views (reorder, edit, add, apply all changes at once). And much more!
6.8 Jan. 2018	***What's New Video***, ***What's New PDF***, and **Connector Email Notifications Video**
6.7 Mar. 2017	***What's New Video*** and ***What's New PDF***
6.6 July 2016	***What's New Video*** and ***What's New PDF***

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