Working with Actions
Stratum.Viewer 6

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Getting Started

Access to Actions

Your user profile level controls what you can do with actions.

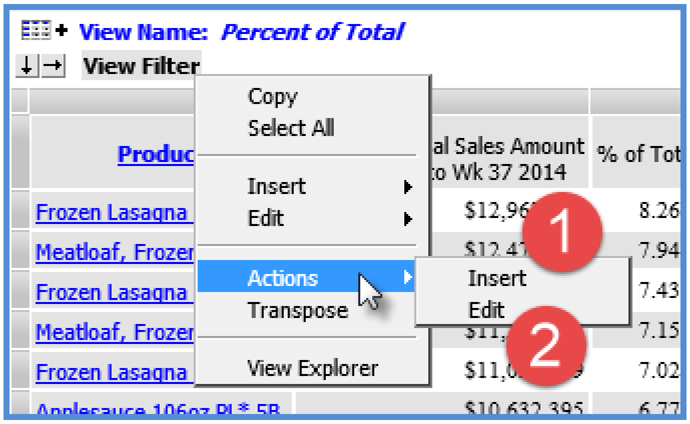
User Profile Level	Personal Actions*				Global Actions			
	Add	Edit	Delete	Process	Add	Edit	Delete	Process
Casual								
Advanced	x	x	x	x				x
View Administrator*	x	x	x	x	x	x	x	x
Security Administrator*	x	x	x	x	x	x	x	x

* Administrators also can view, edit, process, and delete any other user's personal actions.

Accessing Actions Functionality

You can access Actions functionality from an Actions option on a context menu. Right-click any of these areas and choose Actions > Insert or Actions >Edit:

- A view name in the left panel.
- Anywhere in the view grid or the View Definition page.
- The background area of the grid or view explorer.



1	**Insert** – Use to add a new action. The View Distribution window will open for setting up and saving the new action.
2	**Edit** – Use when you want see a list of all actions attached to a view or when you want to add a new action, edit an existing action, delete an action, or process an Email action interactively. The Select Action window will open for that purpose.

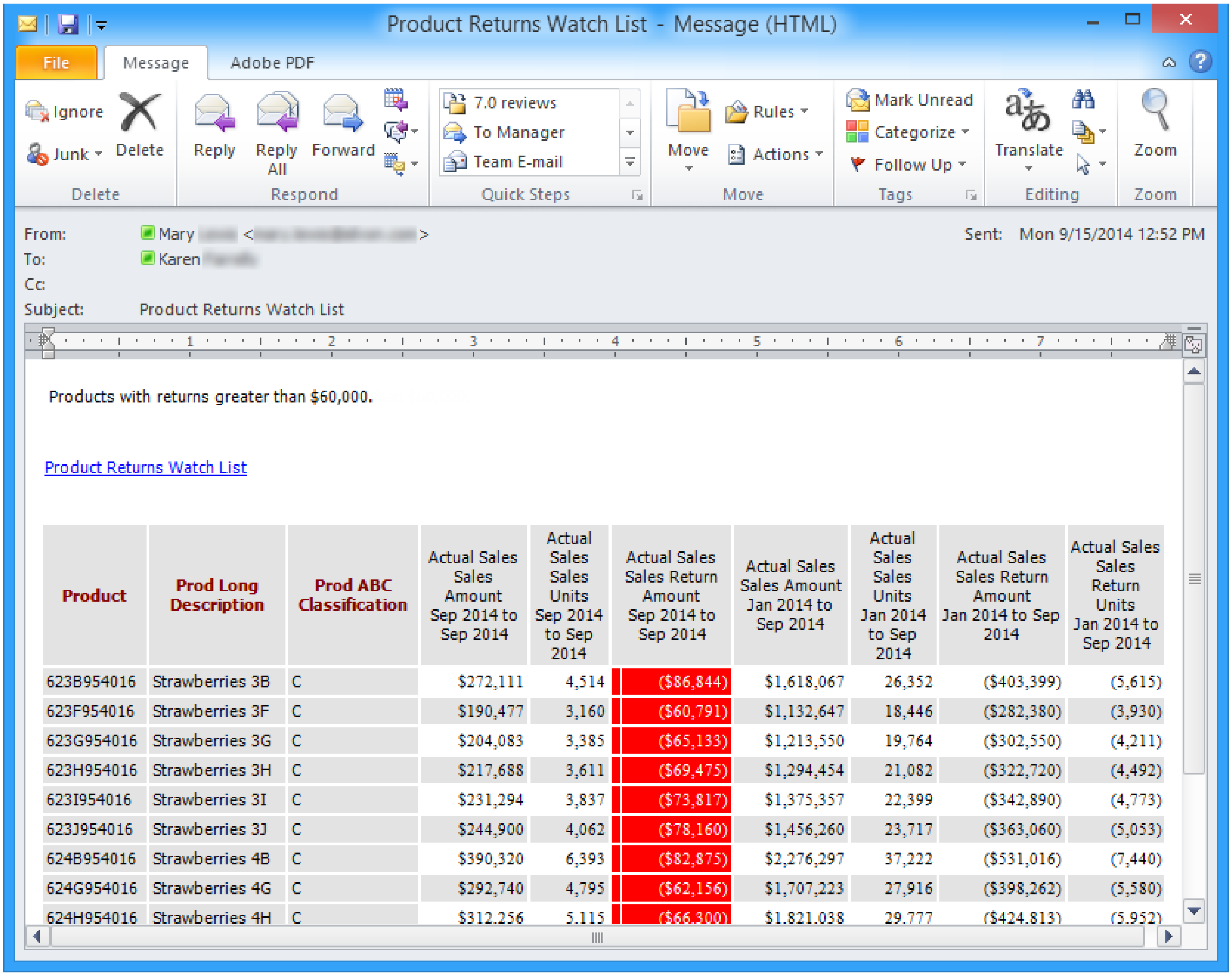
Introduction to Actions

Stratum.Viewer Actions provide additional flexibility in delivering view results. You determine a delivery method, distribution list, and format used to distribute the view results. The view results can be distributed via email and file share, and their distribution can be scheduled. Views that are distributed via email can have the view results included as an attachment in the form of an MS Excel file or included as text in the body of the email.

Example uses of actions are to distribute weekly sales updates and month-end inventory reports as well as to alert users to exceptions such as excessive returns or underperforming products.

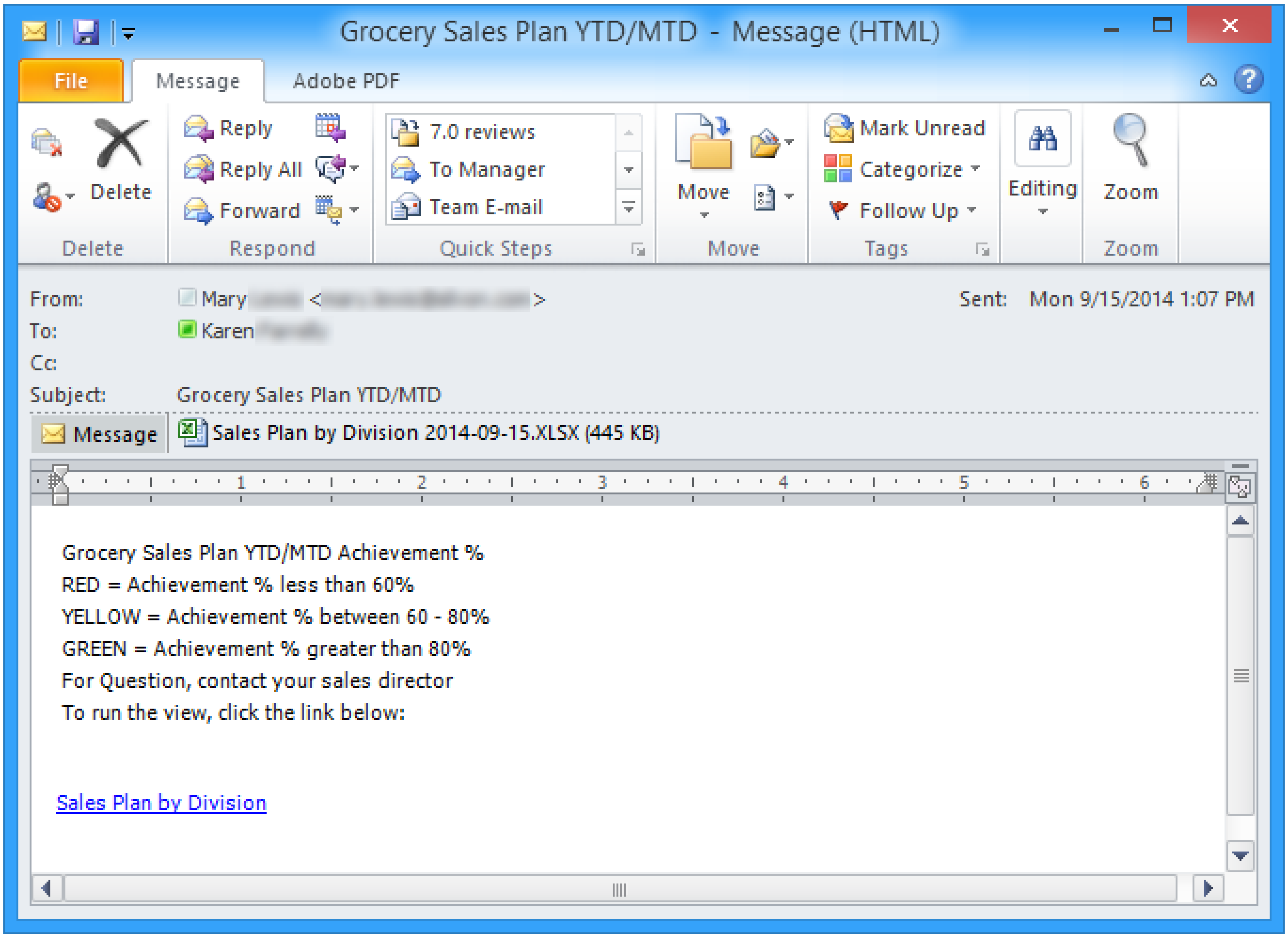
Examples

This is an email created from an action designed to alert key users when current month sales returns are greater than $60,000 for a product. This action is processed every weekend. The email alert contains a list of the products that match the criteria as well as a link to the view used to create the alert. This provides the user with the ability to do further analysis.



Product	Prod Long Description	Prod ABC Classification	Actual Sales Sales Amount Sep 2014 to Sep 2014	Actual Sales Sales Units Sep 2014 to Sep 2014	Actual Sales Sales Return Amount Sep 2014 to Sep 2014	Actual Sales Sales Amount Jan 2014 to Sep 2014	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Sales Sales Return Amount Jan 2014 to Sep 2014	Actual Sales Sales Return Units Jan 2014 to Sep 2014
623B954016	Strawberries 3B	C	$272,111	4,514	($86,844)	$1,618,067	26,352	($403,399)	(5,615)
623F954016	Strawberries 3F	C	$190,477	3,160	($60,791)	$1,132,647	18,446	($282,380)	(3,930)
623G954016	Strawberries 3G	C	$204,083	3,385	($65,133)	$1,213,550	19,764	($302,550)	(4,211)
623H954016	Strawberries 3H	C	$217,688	3,611	($69,475)	$1,294,454	21,082	($322,720)	(4,492)
623I954016	Strawberries 3I	C	$231,294	3,837	($73,817)	$1,375,357	22,399	($342,890)	(4,773)
623J954016	Strawberries 3J	C	$244,900	4,062	($78,160)	$1,456,260	23,717	($363,060)	(5,053)
624B954016	Strawberries 4B	C	$390,320	6,393	($82,875)	$2,276,297	37,222	($531,016)	(7,440)
624G954016	Strawberries 4G	C	$292,740	4,795	($62,156)	$1,707,223	27,916	($398,262)	(5,580)
624H954016	Strawberries 4H	C	$312,256	5,115	($66,300)	$1,821,038	29,777	($424,813)	(5,952)

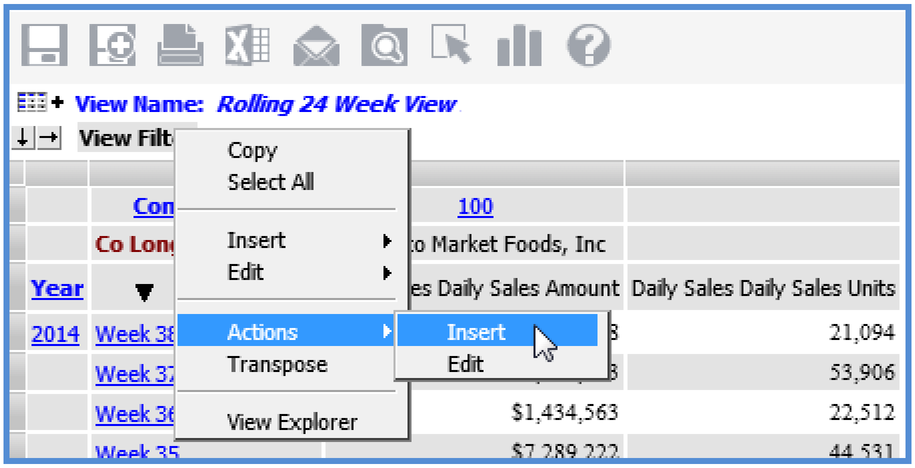
This is an email created from an action designed to distribute a weekly Sales Achievement report to all Sales reps and manager. This action is processed every weekend so that a new Sales Achievement report is in each reps and manager inbox every Monday morning. Each sales rep and manager receives an email with an XLSX attachment that contains only their data based on their security setting.



Quick Start – Set up an Action

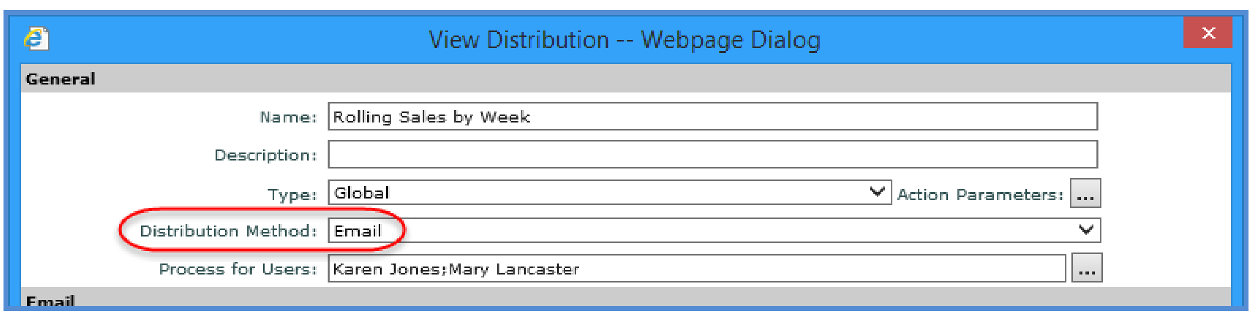
See a typical path taken to set up an action.

1. **Right-click anywhere in the view or view background and select Actions then Insert.**

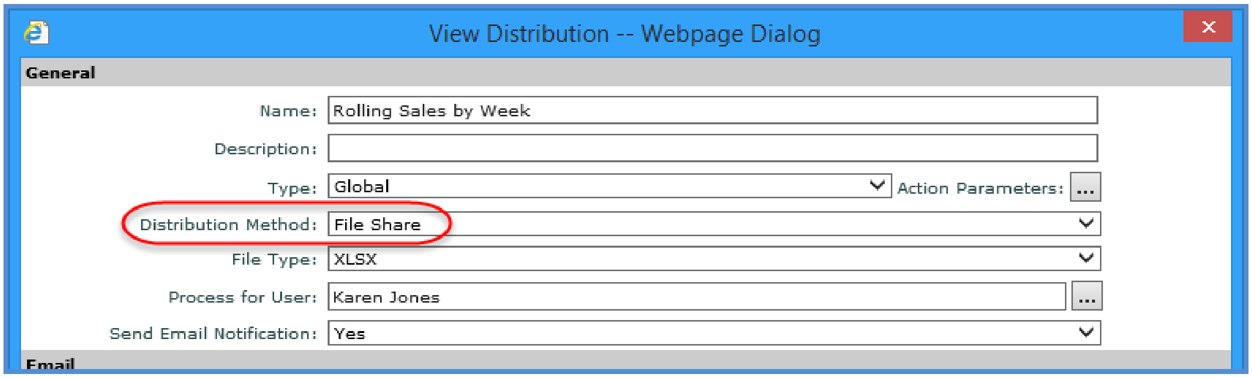


2. **Use the General section in the [View Distribution window](#) to choose the Distribution Method (Email or File Share) and the set up other basic properties.**

   a. **For Email actions, you select one or more Stratum.Viewer users and/or groups to receive the emailed action results. Results will be based on each of their roles.**

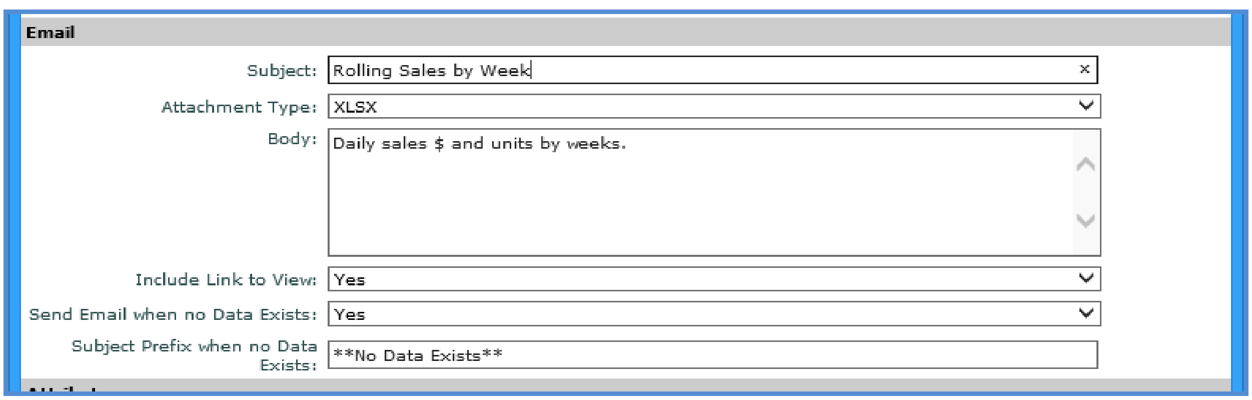


b For File Share actions, you select one user whose role will be used to generate action results. You also determine whether or not an email notification will be sent to that user when the action is processed.

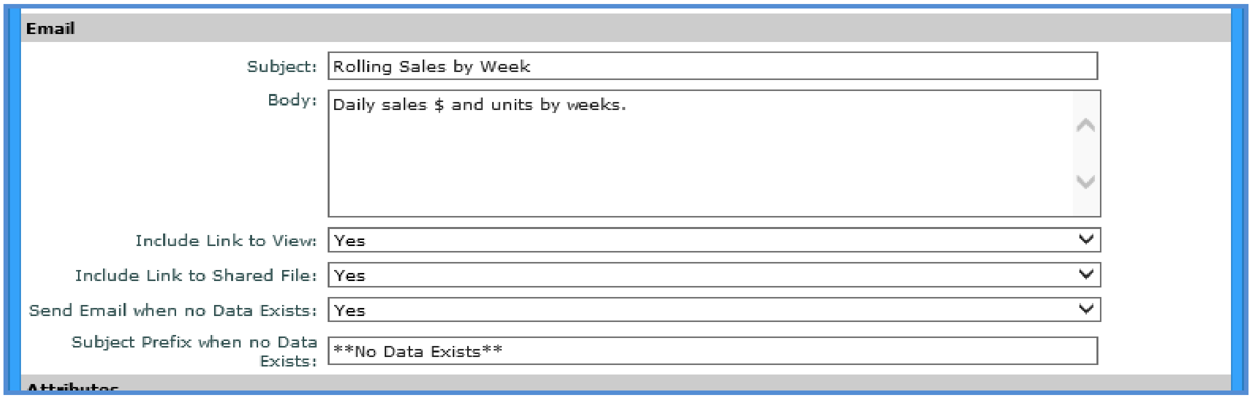


3 Use the Email section to define email properties for the action. Here you control whether or not an email will be sent in cases where no data exists in action results.

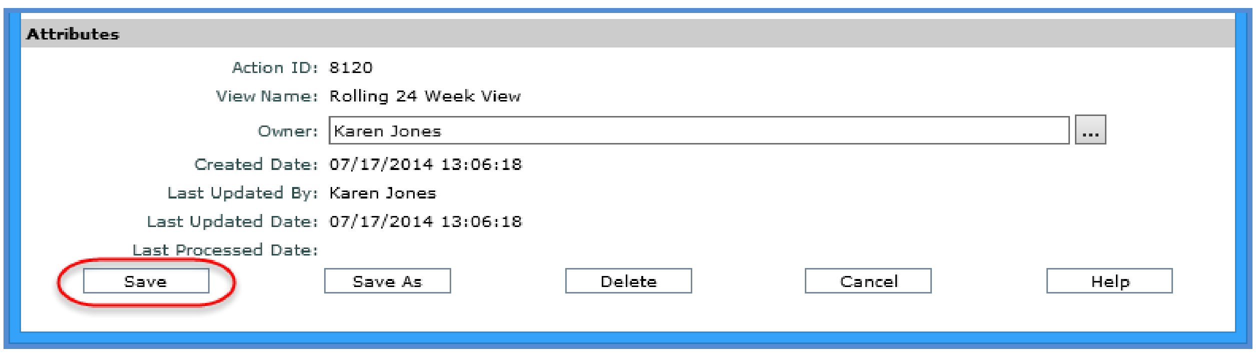
a Emails for Email actions can include view action results as an MS Excel file attachment or text in the body of the email. And they can include links to the view.



b Emails for File Share actions can include a link to the view and a link to the shared file.



4 Click Save. The Attributes section will populate with information about the action.



Tasks

Add an Email Action

1. In the left panel, right-click the name of the view for the action and select Actions then Insert.

   OR

1. If the view is open, right-click anywhere and select Actions then Insert.

2. Use the General section in the View Distribution window to set up the following properties:

   - **Name, Description, and Type** – Administrators can make the action global by selecting Global from the Type drop-down list or personal by selecting Personal. Type defaults to Personal for advanced users.
   - **Distribution Method** – Choose Email.
   - **Process for Users** – Click the Browse button ... and select who will receive emails of action results. Use the User Selection window to select one or more Stratum.Viewer users, one or more Stratum.Viewer user profile groups, or a combination of individual users and groups.

- **Action Parameters** – Optionally click this button to open the Action Parameters window and choose parameter values for the action. The button is only enabled when there are parameter groups and parameters defined for the view.

3. Use the Email section to set up the following properties for the email that will be generated by the action when it's processed:

    - **Subject, Body, and Attachment Type** – Choose XLSX if you want the view results delivered as an MS Excel attachment to the email (recommended for larger views). Choose Include as Text if you want the view results to display in the body of the email.
    - **Include Link to View** – Choose Yes if you want a link to the view included in the body of the email.
    - **Send Email when no Data Exists** – Choose Yes if you want an email generated to users even in cases where there is no data to send to a designated user. For example, if there are no rows and columns returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than $40,000. If you choose No, then no email is sent when no rows or columns exist in the view results for a user.
    - **Subject Prefix when no Data Exists** – If you selected Yes for the previous property and no rows or columns exist in the view results for a user, the prefix defined here will be used in the email subject line before the rest of the Subject field text. Customizing the prefix is optional.

4. Click Save.

Add a File Share Action

1. In the left panel, right-click the name of the view for the action and select Actions then Insert.

   OR

1. If the view is open, right-click anywhere and select Actions then Insert.

2. Use the General section in the View Distribution window to set up the following properties:

    - **Name, Description, and Type** – Administrators can make the action global by selecting Global from the Type drop-down list or personal by selecting Personal. Type defaults to Personal for advanced users.
    - **Distribution Method** – Choose File Share. File Type will be set to XLSX.
    - **Process for User** – Click the Browse button and select which user to use when processing the action (that user's role will determine view results in the file share output from the action). Use the User Selection window to select the user.
    - **Email Notification --** Choose Yes if you want the user to receive an email notice each time the File Share action is processed. If you choose No, the Email section will be disabled and no email notification will be sent.
    - **Action Parameters** – Optionally click this button to open the Action Parameters window and choose parameter values for the action. The button is only enabled when there are parameter groups and parameters defined for the view.

3. If you select Yes for Email Notification, use the Email section to set up the following properties for the action email:

    - **Subject and Body Text** – Specify the email subject and body text (body text is optional).
    - **Include Link to View** – Choose Yes if you want a link to the view included in the body of the email.
    - **Include Link to Shared File** – Choose Yes if you want a link to the shared file included in the body of the email.
    - **Send Email when no Data Exists** – Choose Yes if you want an email generated to users even in cases where there is no data to send to a designated user. For example, if there are no rows and columns

returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than $40,000. If you choose No, then no email is sent when no rows or columns exist in the view results for a user.

- **Subject Prefix when no Data Exists** – If you selected Yes for the previous property and no rows or columns exist in the view results for a user, the prefix defined here will be used in the email subject line before the rest of the Subject field text. Customizing the prefix is optional.

4. Click Save.

Delete an Action

1. In the left panel, right-click the name of the view for the action and select Actions then Edit.

   OR

1. If the view is open, right-click anywhere and select Actions then Edit.

2. Select the action from the Select Action window, and click Delete. Multiple actions can be selected for deletion using Ctrl+Click or Shift+Click.

3. Confirm the deletion.

Edit an Action

1. In the left panel, right-click the name of the view for the action and select Actions then Edit.

   OR

1. If the view is open, right-click anywhere and select Actions then Edit.

2. Select the action from the Select Action window, and click Edit or double-click the action.

3. Edit the action properties in the View Distribution window:

   - **General** – Use the General section to edit the name or description, to control the global or personal type, to change who the action will be processed for, or to change action parameters. If editing File Share actions, you can also edit whether or not email notification will be sent each time the action is processed.

Note: The Distribution Method drop-down list will be disabled because the method cannot be changed once an action has been saved.

   - **Email** – If this section is enabled, use it to edit properties of the email associated with the action such as the body, subject, or including links to a view or shared file. Also use this section to edit settings related to sending email in cases where no data exists in the action results.
   - **Attributes** – If you are an administrator and need to change the action owner, click the Browse button next to the Owner property. Use the Select User window to choose the new owner.

4. Click Save.

Interactively Process Email Actions

1. In the left panel, right-click the name of the view for the action and select Actions then Edit.

OR

1. If the view is open, right-click anywhere and select Actions then Edit.

2. Select the action from the Select Action window, and click Process.

3. Confirm that you want to proceed with the interactive process by clicking OK in the prompt that displays.

Note: These processing steps only apply to Email actions. File Share actions must be scheduled for processing by your Action Administrator. See Scheduled Actions Overview, Parameters, and Examples for details. Email actions can be processed either interactively or by scheduled processing.

Schedule Actions for Processing

Action Administrators should review Scheduled Actions Overview, Parameters, and Examples for details about scheduling Email and File Share actions for processing. Email actions can be processed either interactively or by schedules processing. File Share actions must be processed via scheduling.

Use “Save As” to Create a New Action

1. Click Save As while working with an existing action in the View Distribution window.

2. Set up basic properties for the new action in the Save View Distribution As window.

    a. Description is optional.

    b. Type will automatically be set to Personal if you are an advanced user. You can select Global as the Type if you are a view or security administrator and want to create a global action or Personal to create a personal action.

3. Click Save.

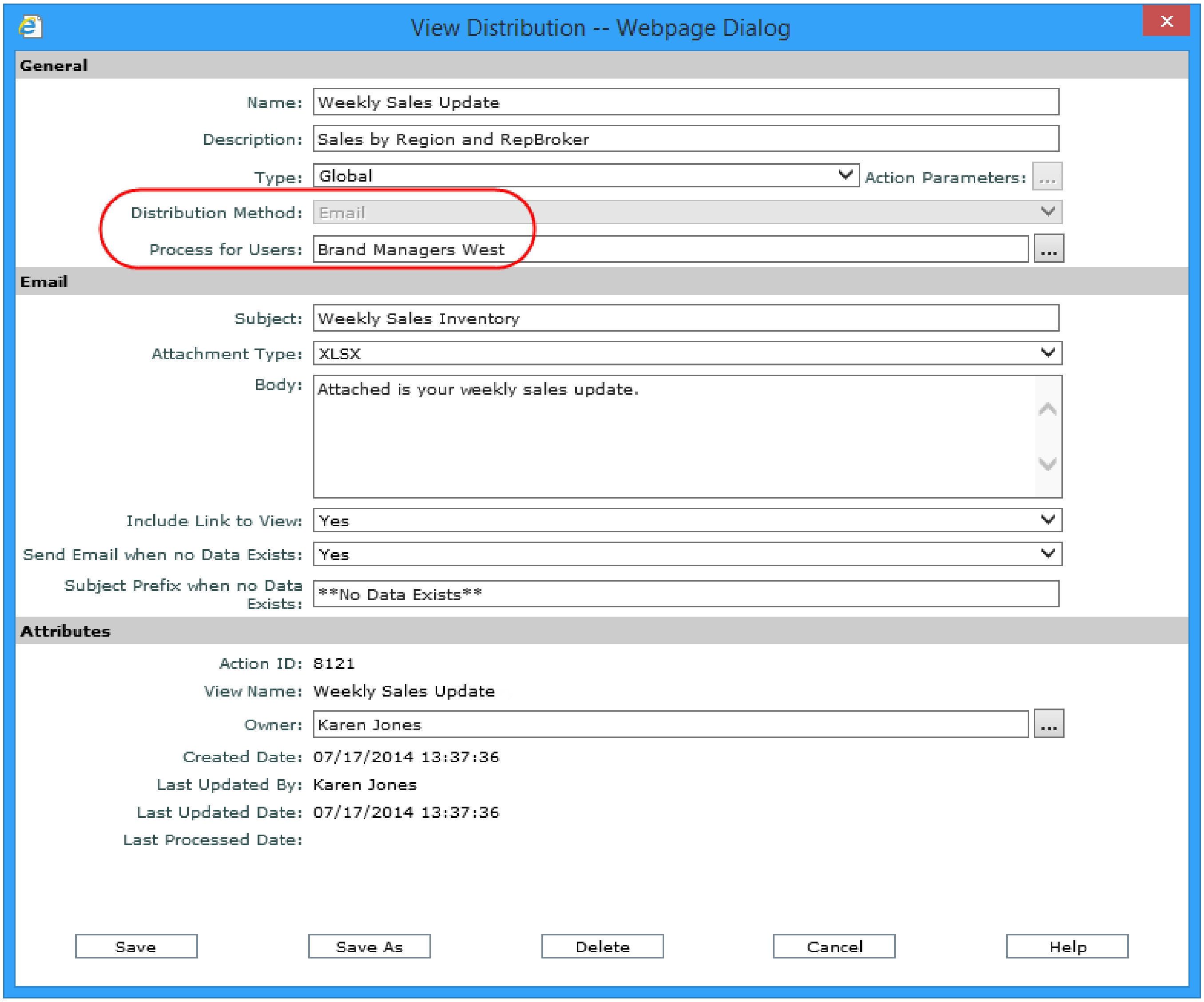
4. If needed, make additional customizations to the new action when it displays in the View Distribution window and then click Save.

Examples

Example Actions

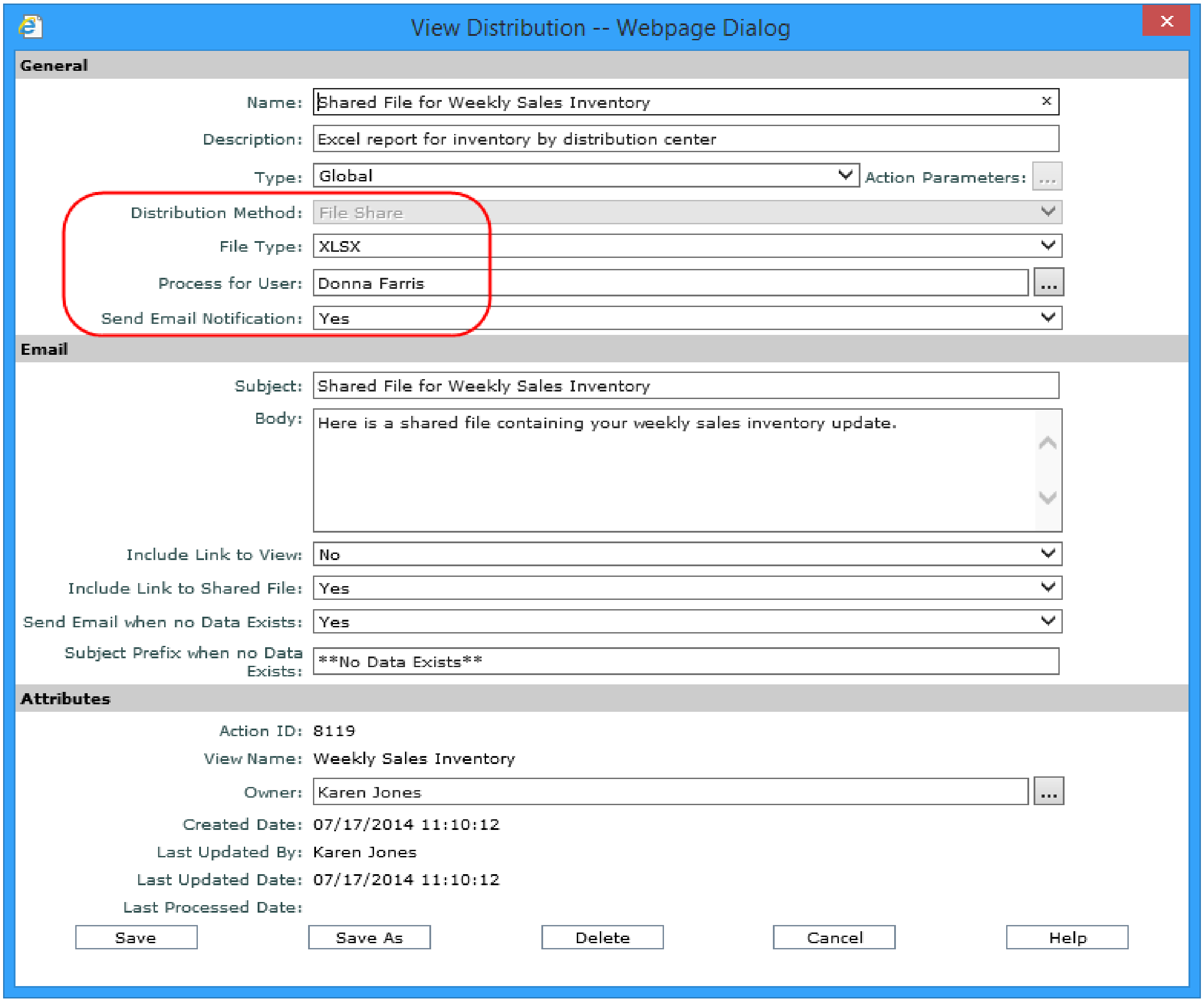
The following examples show properties defined for an Email and File Share action.

The first example is an Email action. Properties were defined to email weekly sales updates to all the sales reps and managers. The Distribution Method is set to Email and the action will be processed for a Stratum.Viewer user profile group named Brand Managers West. The Email section properties show that each user in each group will receive an email with an MS Excel file attachment containing the Weekly Sales view results and link to the view. The view results will be generated based on each user's role.



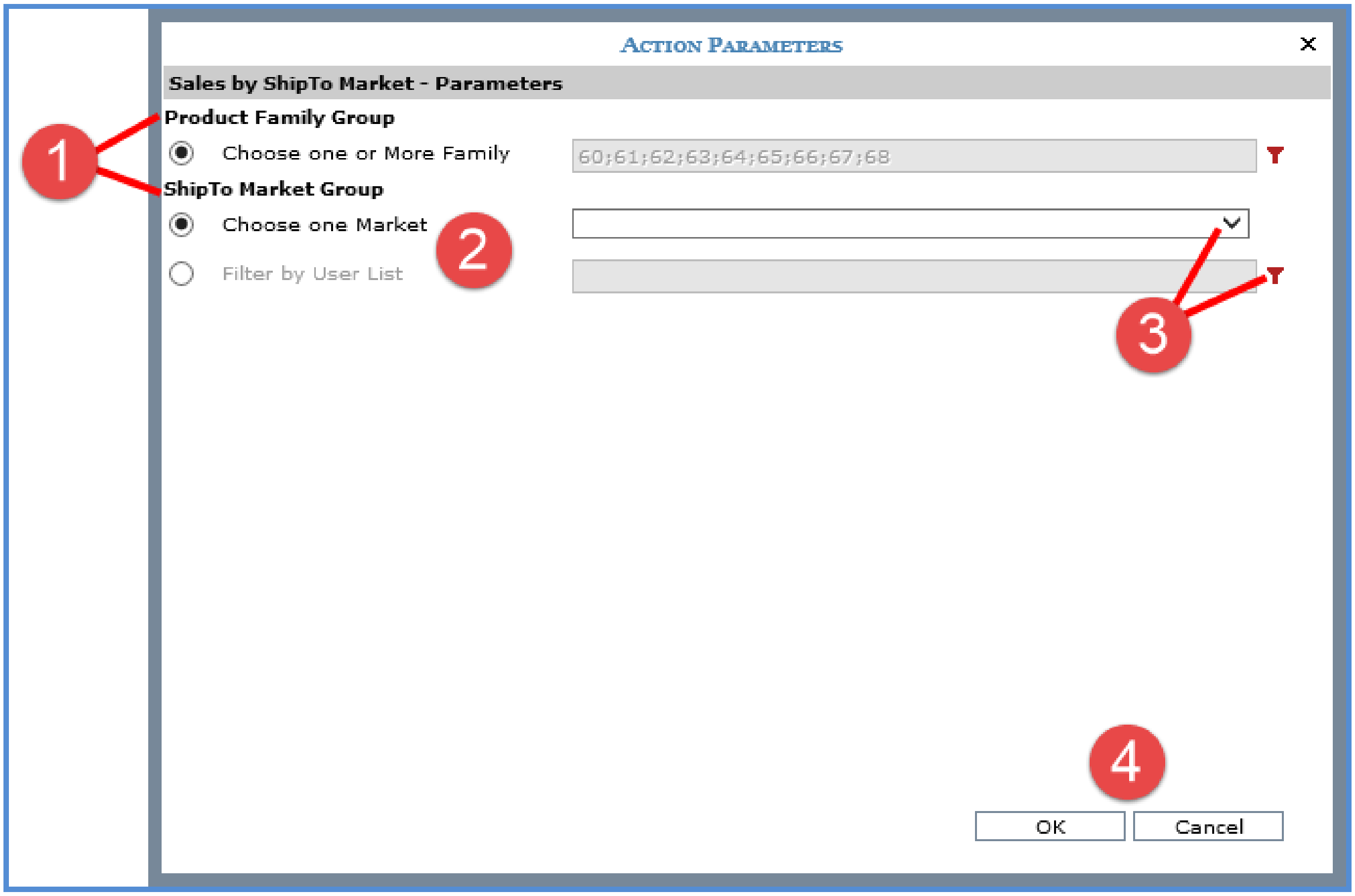
The next example shows a File Share action defined to create an MS Excel file that is used by the company's internal sales portal. The Distribution Method is set to File Share and will be processed for the user Donna Farris. The action was also defined such that the user receives an email notification whenever the action is processed. Based on the properties defined in the Email section, the email notification will include a link to the shared file, which will be an MS Excel file containing view data based on the user's role. The email will not include a link to the view, but you do have the option of including that link.

Note: The location and name of the shared file will be determined by parameters that are used when scheduling the action to be run.



Action Parameters Window

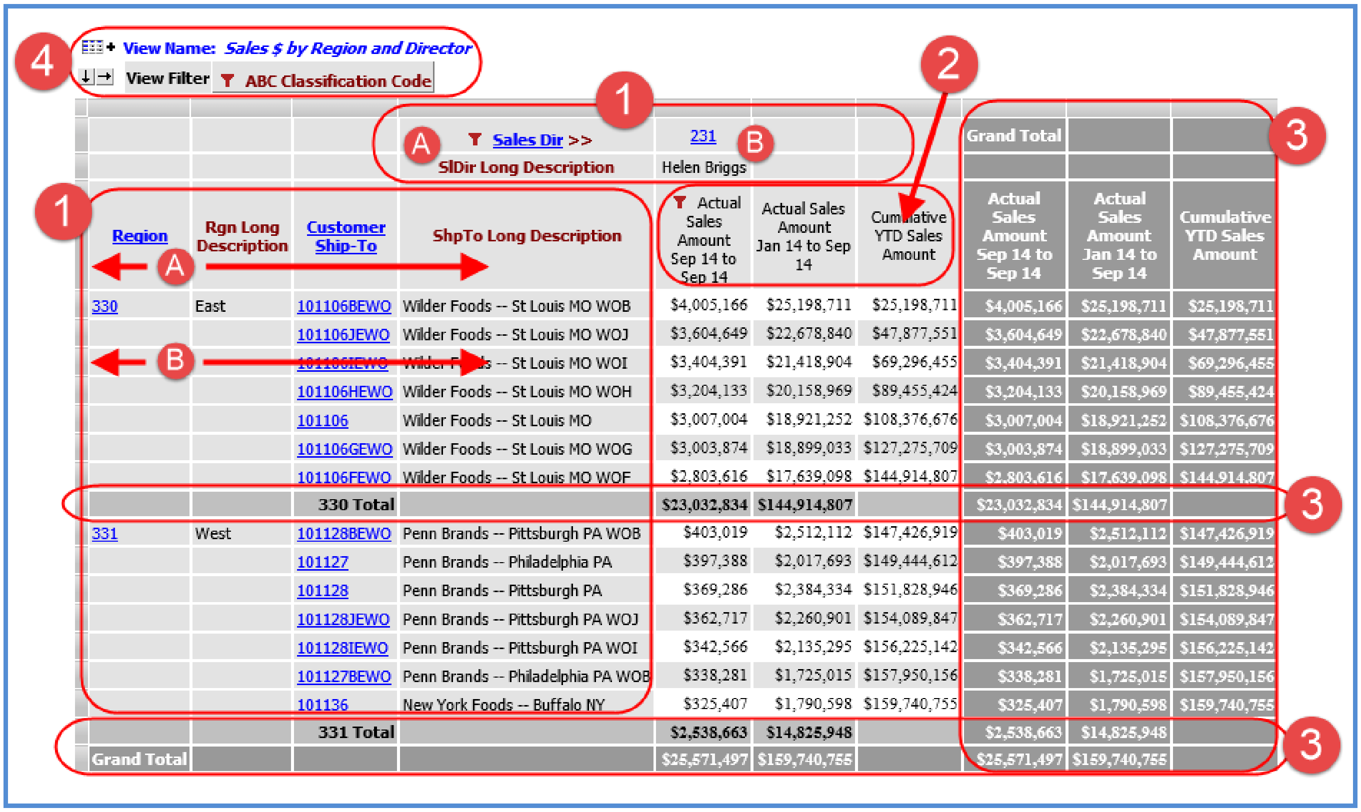
The parameter groups and parameters defined for a view will be available in the Action Parameters window for any actions defined for the view.



1	**Parameter Groups** - You can distinguish each parameter group that exists for an action by the bold name above each group. In this example, there is a group named "Product Family Group" for the Product Family level in the view, and a group named "ShipTo Market Group" for the ShipTo Market level. Each group has its own set of parameters and one parameter per group can be used to filter its respective level.
2	**Individual Parameters** - Parameters in each group have their own radio buttons. Select one to activate that parameter and then specify a value for it (see 3 below). If you ran the view and selected values for parameters just before setting up an action, those values will display when you first open the Action Parameters window. You can leave the values as is or customize them based on the values you want to be applied to the action results. Once you save the action with the selected action parameter values, those values will stay as is unless you re-access this window to change them.
3	**Specifying Parameter Values** - Select a parameter's radio button then use the control provided to specify values: • **Drop Down** parameters have a drop-down list. A single member can be selected. • **Member List, User List, and Expression** parameters have a filter icon next to them. Click the icon and use the window that opens to specify the member(s), user list, or expression for the parameter value. You will use the Select or Advanced Select Members window for Member List parameters, Select User List Filter window for User List parameters, and Expression window for

	Expression parameters. Clicking OK in the filtering window returns the specified member(s), user list, named set, or expression to the parameter's field in the Action Parameters window.
4	**OK and Cancel** - • **OK** - If you specify parameters and click OK, the window closes and the specified parameter values will be saved as part of the action definition. • **Cancel** - If you click Cancel, the window closes and the View Distribution window displays.

Grid



View Name: *Sales $ by Region and Director*

View Filter: ABC Classification Code

			Sales Dir >>	231			Grand Total		
			SlDir Long Description	Helen Briggs					
Region	Rgn Long Description	Customer Ship-To	ShpTo Long Description	Actual Sales Amount Sep 14 to Sep 14	Actual Sales Amount Jan 14 to Sep 14	Cumulative YTD Sales Amount	Actual Sales Amount Sep 14 to Sep 14	Actual Sales Amount Jan 14 to Sep 14	Cumulative YTD Sales Amount
330	East	101106BEWO	Wilder Foods -- St Louis MO WOB	$4,005,166	$25,198,711	$25,198,711	$4,005,166	$25,198,711	$25,198,711
		101106JEWO	Wilder Foods -- St Louis MO WOJ	$3,604,649	$22,678,840	$47,877,551	$3,604,649	$22,678,840	$47,877,551
		101106IEWO	Wilder Foods -- St Louis MO WOI	$3,404,391	$21,418,904	$69,296,455	$3,404,391	$21,418,904	$69,296,455
		101106HEWO	Wilder Foods -- St Louis MO WOH	$3,204,133	$20,158,969	$89,455,424	$3,204,133	$20,158,969	$89,455,424
		101106	Wilder Foods -- St Louis MO	$3,007,004	$18,921,252	$108,376,676	$3,007,004	$18,921,252	$108,376,676
		101106GEWO	Wilder Foods -- St Louis MO WOG	$3,003,874	$18,899,033	$127,275,709	$3,003,874	$18,899,033	$127,275,709
		101106FEWO	Wilder Foods -- St Louis MO WOF	$2,803,616	$17,639,098	$144,914,807	$2,803,616	$17,639,098	$144,914,807
		330 Total		$23,032,834	$144,914,807		$23,032,834	$144,914,807	
331	West	101128BEWO	Penn Brands -- Pittsburgh PA WOB	$403,019	$2,512,112	$147,426,919	$403,019	$2,512,112	$147,426,919
		101127	Penn Brands -- Philadelphia PA	$397,388	$2,017,693	$149,444,612	$397,388	$2,017,693	$149,444,612
		101128	Penn Brands -- Pittsburgh PA	$369,286	$2,384,334	$151,828,946	$369,286	$2,384,334	$151,828,946
		101128JEWO	Penn Brands -- Pittsburgh PA WOJ	$362,717	$2,260,901	$154,089,847	$362,717	$2,260,901	$154,089,847
		101128IEWO	Penn Brands -- Pittsburgh PA WOI	$342,566	$2,135,295	$156,225,142	$342,566	$2,135,295	$156,225,142
		101127BEWO	Penn Brands -- Philadelphia PA WOB	$338,281	$1,725,015	$157,950,156	$338,281	$1,725,015	$157,950,156
		101136	New York Foods -- Buffalo NY	$325,407	$1,790,598	$159,740,755	$325,407	$1,790,598	$159,740,755
		331 Total		$2,538,663	$14,825,948		$2,538,663	$14,825,948	
Grand Total				$25,571,497	$159,740,755		$25,571,497	$159,740,755	

1	**Rows and Columns -** The grid displays levels along the rows and columns axis. You can create views with levels on one axis (rows or columns) or levels on both axes. • A **Header Cells -** Header cells contain names of levels and attribute relationships. In the above image, the row levels are Region and Customer Ship-To. The column level is Sales Dir. The other header cells are for their attribute relationships that were selected for display in the view. • B **Detail Cells -** Detail cells contain level member and attribute relationship values. In this example, the member values for first level on rows are 330 and 331. That set of cells is known as the display text. Next are the values for the Rgn Long Description attribute relationship. You have the option of designating an attribute relationship as the display text rather than the member value. The detail cells on the columns axis show the 231 member and Helen Briggs attribute relationship value. • **Pop-up Menus -** Right-click objects to display actions that you can take related to that object

or axis, such as editing hierarchies. See Grid Pop-up Menus.

- **Drag and Drop Enabled -** You can drag and drop levels and attribute relationships to change their order. Drag and drop within the grid or between the grid and view explorer. See Edit the Order of View Objects Using Drag and Drop.

- **Drill Path and Drilldown View Links -** If multiple levels have been defined for an axis, you can click on links in the grid to drill between levels. You can drill on level names (drill by header) or members (drill by detail). If a drilldown view has been assigned to an axis, the last level in the drilldown path for that axis will be a link -- click a link to display the drilldown view. See Drill Up or Down Within a View.

- **Sort and Filter Icons -** Icons display next to grid objects that have been sorted ▲▼ or filtered. Pop-up labels display the sort and filter details when the cursor is moved over the respective icon. See also Use Sort and Filter Icons as Task Shortcuts.

2

Measure Items - Measure items can be assigned to one axis, either rows or columns. If you create any distinct calculated measure items, you can position them before all other measure items or after all other measure items.

- **Double-click Enabled and Pop-up Menus -** You can double-click captions of regular measure items to access the Edit Measure Item window and double-click captions of calculated measure items to access the Expression window for editing purposes. You can also right-click measure items to display all actions that you can take related to that object or axis, such as inserting additional measure items. See Grid Pop-up Menus.

- **Drag and Drop Enabled -** You can drag and drop measure items to change their order. Drag and drop within the grid or between the grid and view explorer. See Edit the Order of View Objects Using Drag and Drop.

- **Drill Path and Drilldown View Links -** If a drilldown view has been assigned to the measure item axis, the measure items will display as links. Click a link to display the drilldown view. The grid shown above doesn't have a drilldown view assigned to its measure items axis. Here is what the grid would look like had a drilldown view been assigned.

Actual Sales Amount Sep 14 to Sep 14	Actual Sales Amount Jan 14 to Sep 14	Cumulative YTD Sales Amount
$4,005,166	$25,198,711	$25,198,711
$3,604,649	$22,678,840	$47,877,551
$3,404,391	$21,418,904	$69,296,455
$3,204,133	$20,158,969	$89,455,424
$3,007,004	$18,921,252	$108,376,676
$3,003,874	$18,899,033	$127,275,709

- **Sort and Filter Icons -** Icons display next to measure items that have been sorted ▲▼ or filtered. Pop-up labels display the sort and filter details when the cursor is moved over the respective icon. See also Use Sort and Filter Icons as Task Shortcuts.

3

Totals - Grand totals and sub-totals are displayed in darker grey rows and columns. Totals can be displayed for some, all, or no objects in the view. You can control totals by measure items, individual levels, or an entire axis. Grand Totals that are on the same axis as measure items can be sorted and

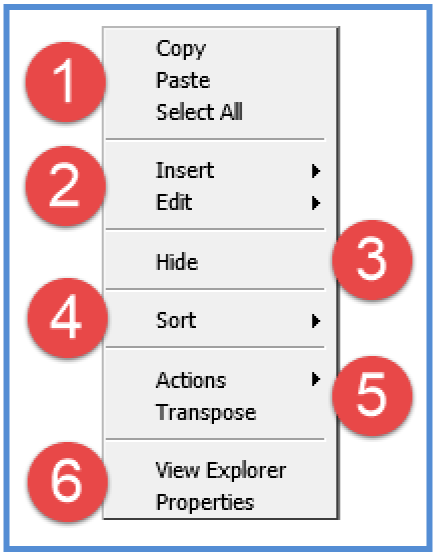
	filtered.
4	**View Name -** Displays the view name. Right-click to display actions that you can take related to the overall grid, such as exporting to excel. See Grid Pop-up Menus. **Expand View or Collapse View -** In collapsed mode, the grid displays a select number of rows and columns per page. The number of rows or columns that display per page is controlled by your administrator, but you can customize the setting with an Override View Page Size setting in your User Options. In expanded mode, all rows and columns are displayed. If you want to change the mode, click this toggle. The collapsed mode is recommended for views with large row and column counts. **Axis Icons -** An icon exists for rows and columns . • **Pop-up Menus** - Right-click to display actions that you can take related to that axis, such as controlling the display of totals by axis. See Grid Pop-up Menus. • **Filter Icons** - Icons display next to an axis that has been filtered. Pop-up labels display the filter details when the cursor is moved over the icon. See also Use Sort and Filter Icons as Task Shortcuts. **View Filter -** If you used this section to apply a filter to the entire grid, levels used in the filter will display here. • **Pop-up Menus -** Right-click the View Filter header or levels in it to display actions that you can take related to that object or section of the grid, such as filtering levels in that section. See Grid Pop-up Menus. • **Drag and Drop Enabled-** You can drag and drop levels in the view filter to change their order. Drag and drop within the grid or between the grid and view explorer. See Edit the Order of View Objects Using Drag and Drop. • **Filter Icons** - Icons display next to levels that have been filtered . Pop-up labels display the filter details when the cursor is moved over the icon. See also Use Sort and Filter Icons as Task Shortcuts.

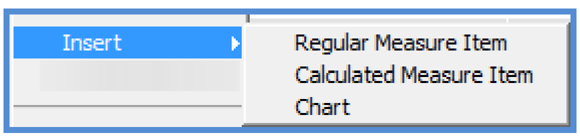
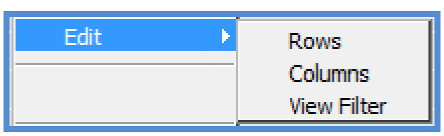
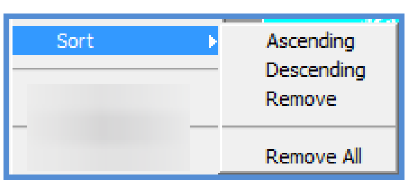
Grid Pop-up Menus

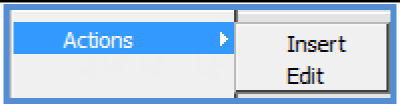
Right-click objects in views to display actions that you can take such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes. Options on pop-up menus vary by user. Your user profile level determines which options are available to you. The menus in these examples are for a user with an advanced level of access. Menus are displayed in alphabetical order.

Attribute Relationships Pop-up Menu

Right-click an attribute relationship to display actions that you can take related to that object or axis.

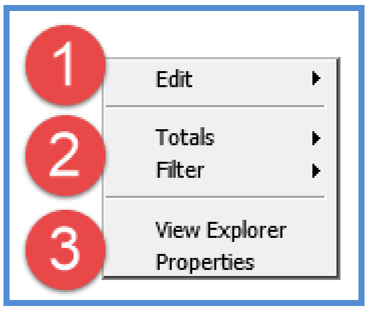


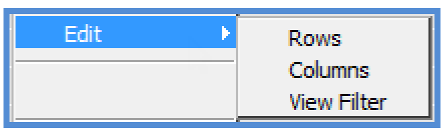
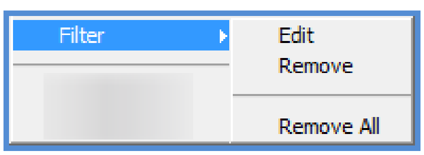
1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. **Select All -** Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.  **Edit** - Edit the hierarchies on the rows, columns, or view filter. 
3	**Hide** - When an attribute relationship is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the attribute relationship changes to No. From view explorer, you can drag an attribute relationship back in the grid if needed, or you can change the Visible property to Yes.
4	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All. 
5	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.

	 **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
6	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties -** Click to maintain the attribute relationship properties including sorting and whether it is visible or not.

Axis Pop-up Menu

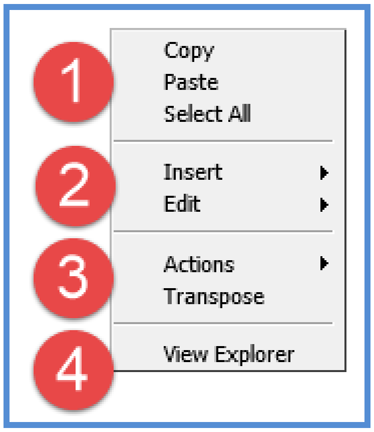
Right-click to display actions that you can take related to that axis, such as controlling the display of totals by axis.

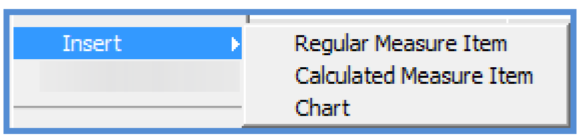
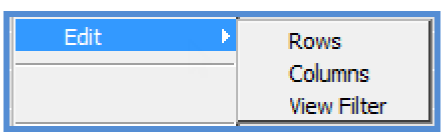
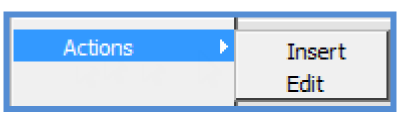


1	**Edit** - Edit the hierarchies on the rows, columns, or view filter. 
2	**Totals** - Control whether totals are displayed for all levels on the axis by choosing Yes or No. The Totals Default property in the Properties window for the axis also changes to reflect your choice, as does the Totals property in the Properties window for each level on that axis. **Filter -** Filter options are Edit, Remove, and Remove All. 
3	**View Explorer -** This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties** - Click to maintain the view properties including the name, description, type and view group.

General Pop-up Menu

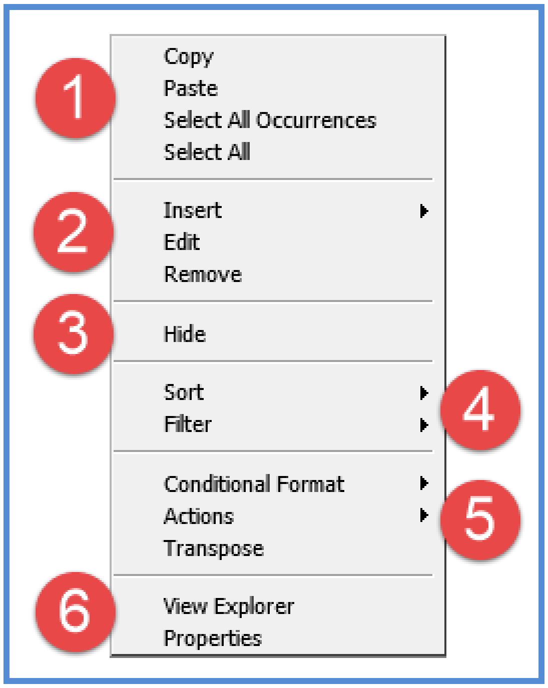
Right-click within the grid to display actions that you can take such as transposing the rows, columns, and measure items.



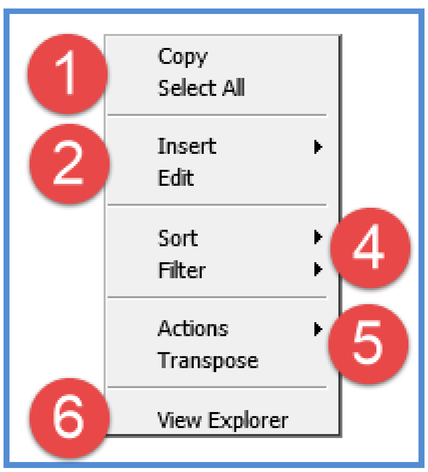
1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. **Select All** - Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.  **Edit** - Edit the hierarchies on the rows, columns, or view filter. 
3	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.  **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.
4	**View Explorer -** This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.

Measure Item Pop-up Menus (Detail and Grand Total Menus)

Measure items can be assigned to one axis, either rows or columns. Right-click the caption of a measure item in a detail row or column to display actions that you can take related to that object, such as inserting additional measure items or applying conditional formats.

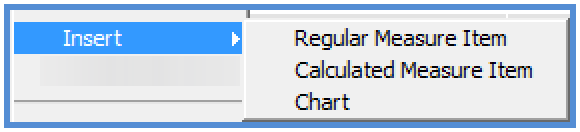
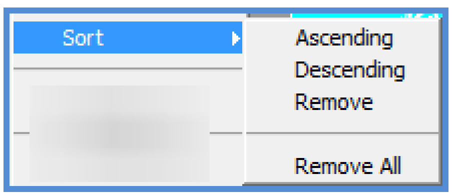
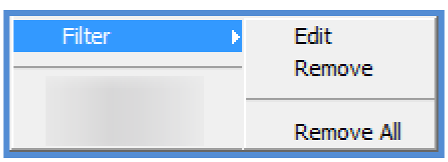
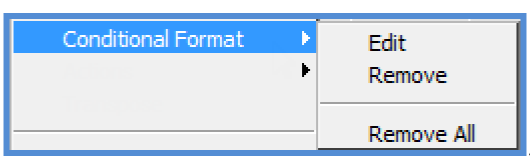
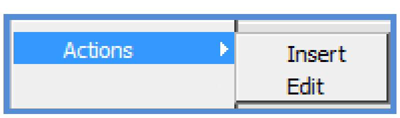


Or, right-click the caption of a measure item in a Grand Total row or column to work with values in that area of a view, such as by applying sorts and filters to them.



Descriptions follow of the menus for measure items in detail and Grand Total rows or columns.

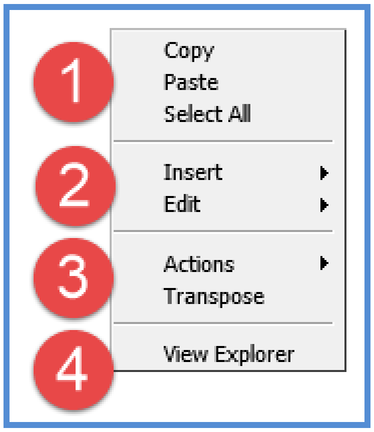
1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. This option does not display on the menu for Grand Totals. **Select All Occurrences** - Use this option to select data for all occurrences of that measure item in the active page of the View. This option does not display on the menu for Grand Totals. **Select All -** Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting

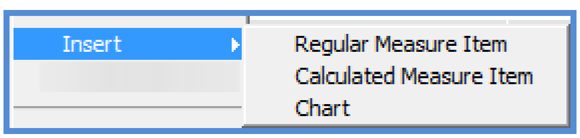
	Data Wizard will display when inserting a new chart.  **Edit** - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens the Expression window so you can edit the measure item expression. **Note:** Another way to access the Edit Measure Item window or Expression window is to double-click the caption of the respective regular or calculated measure item. **Remove** - Removes the measure item from the view definition without confirmation. It will no longer display in the view explorer. This option does not display on the menu for Grand Totals.
3	**Hide** - When a measure item is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the measure item changes to No. From view explorer, you can drag a measure item back in the grid if needed, or you can change the Visible property to Yes. This option does not display on the menu for Grand Totals.
4	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All.  **Filter -** Filter options are Edit, Remove, and Remove All. 
5	**Conditional Format –** Use this option to edit or add conditional formatting on the measure item, There are also options for removing the conditional format on the active measure item or all measure items. This option does not display on the menu for Grand Totals.  **Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.  **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
6	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties -** Click to maintain the measure item properties including the name, caption expression,

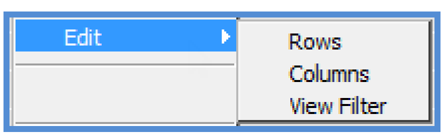
	type, pop-up labels, hyperlinks, and so forth. This option does not display on the menu for Grand Totals.

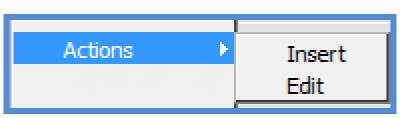
View Filter Pop-up Menu

Right-click the View Filter header to display actions that you can take related to that object or section of the grid, such as filtering levels in that section.



<table>
<tr><td>1</td><td> Copy - This option allows you to copy sections of a view that you have selected. Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. Select All - Use this option to select the entire grid. </td></tr>
<tr><td>2</td><td> Insert - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.


Edit - Edit the hierarchies on the rows, columns, or view filter.


</td></tr>
<tr><td>3</td><td> Actions – Use this option to insert new actions or to edit, process, or delete existing actions.


Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa. </td></tr>
<tr><td>4</td><td> View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. </td></tr>
</table>

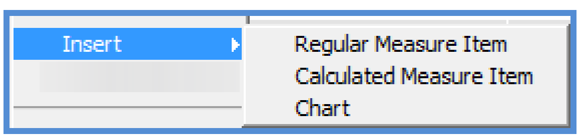
Levels Pop-up Menu

Right-click the level to display actions that you can take related to the level, such as editing the hierarchy.

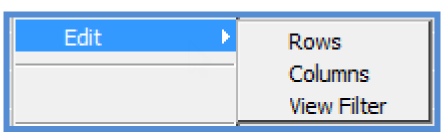
<table>
<tr><td>1</td><td>Copy - This option allows you to copy sections of a view that you have selected.

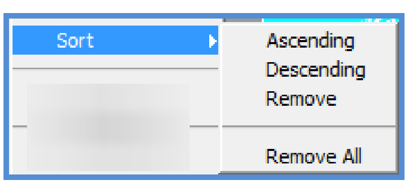
Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.

Select All - Use this option to select the entire grid.</td></tr>
<tr><td>2</td><td>Insert - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.

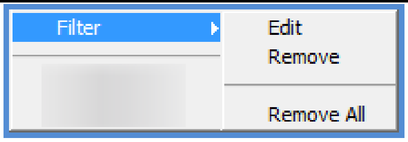
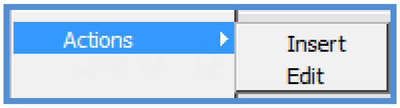


Edit - Edit the hierarchies on the rows, columns, or view filter.


</td></tr>
<tr><td>3</td><td>Hide - When a level is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the level changes to No. From view explorer, you can drag a level back in the grid if needed, or you can change the Visible property to Yes.</td></tr>
<tr><td>4</td><td>Sort - Sort options are Ascending, Descending, Remove, and Remove All.

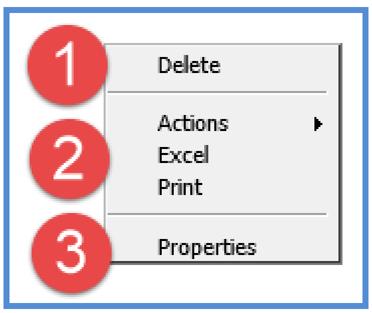


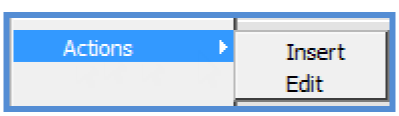
Filter - Filter options are Edit, Remove, and Remove All.</td></tr>
</table>

	
5	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.  **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
6	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties** - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text.

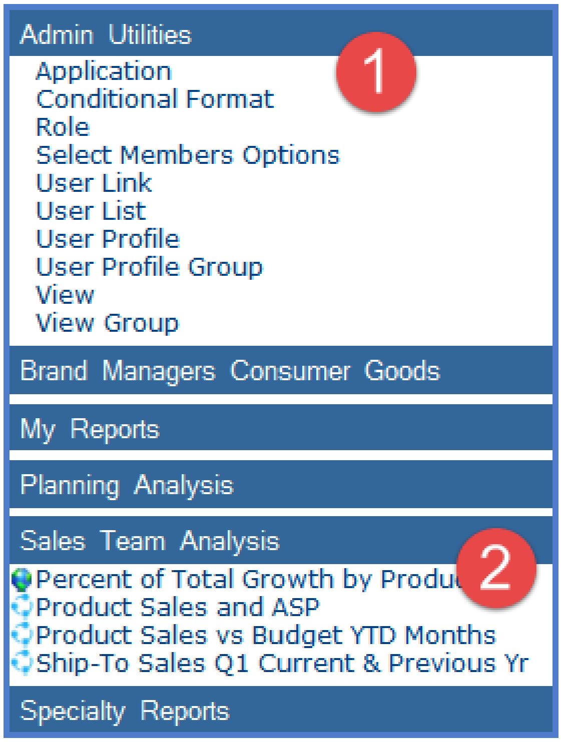
View Name Pop-up Menu

Right-click the view name to display actions that you can take related to the overall grid, such as exporting to Excel.



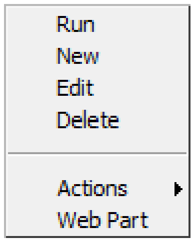
1	**Delete** - Choose Delete to delete the view with confirmation. Anyone can delete their own personal views, but only view and security administrators may delete global views.
2	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.  **Excel** - Click to initiate an export of the view to Microsoft Excel. **Print** - Click to print the active page of the view.
3	**Properties** - Click to maintain the view properties including the name, description, type and view group.

Left Panel

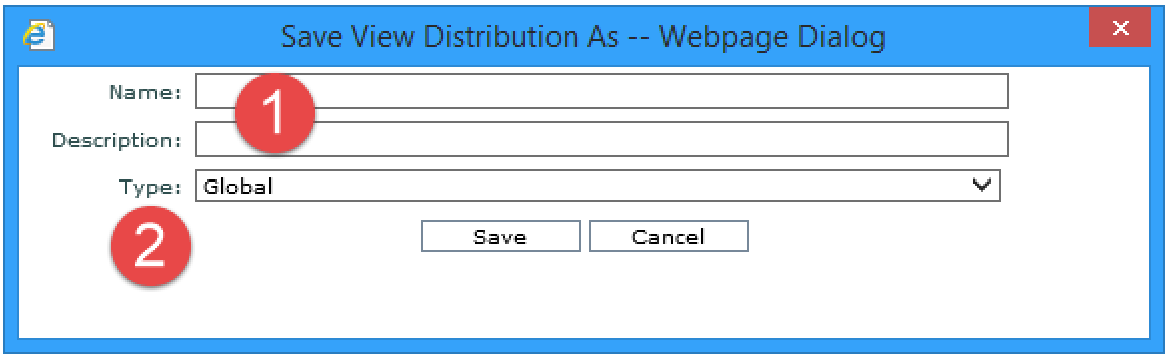


1	The left panel is organized into groups, including an Admin Utilities group and view groups. Contents of the Admin Utilities group vary depending on your level of access. Clicking an item in the group opens the respective administrative page. The order of groups varies by user depending on settings for their user profile group. Contents of the Admin Utilities group vary depending on your level of access to the application. • **Casual** = No Admin Utilities group displays for casual users. They can control additional aspects of the application such as User Options from drop-down menus in the top panel. • **Advanced** = Conditional Format, User Link, and User List. • **View Administrator** = Application, Conditional Format, Select Members, User Link, User List, User Profile Group, View, and View Group. • **Security Administrator** = Application, Conditional Format, Role, Select Members, User Link, User List, User Profile, User Profile Group, View, and View Group.

2	View groups contain the views and user links that you can use in the application.
	• Click a group to expand or collapse its contents.
	• Click a view or link to run it. Icons next to the view or link indicate whether they are global or personal (or shared in the case of views):
	  • = personal view, = global view, and = shared view.
	  • = personal link and = global link
	• Right-click a view group, view, or user link to select a type of action to take from their pop-up menu. Contents of the menu vary depending on your level of access.
	  • The New View option on a view group pop-up menu opens a page for building a view and assigns the view to that group by default.

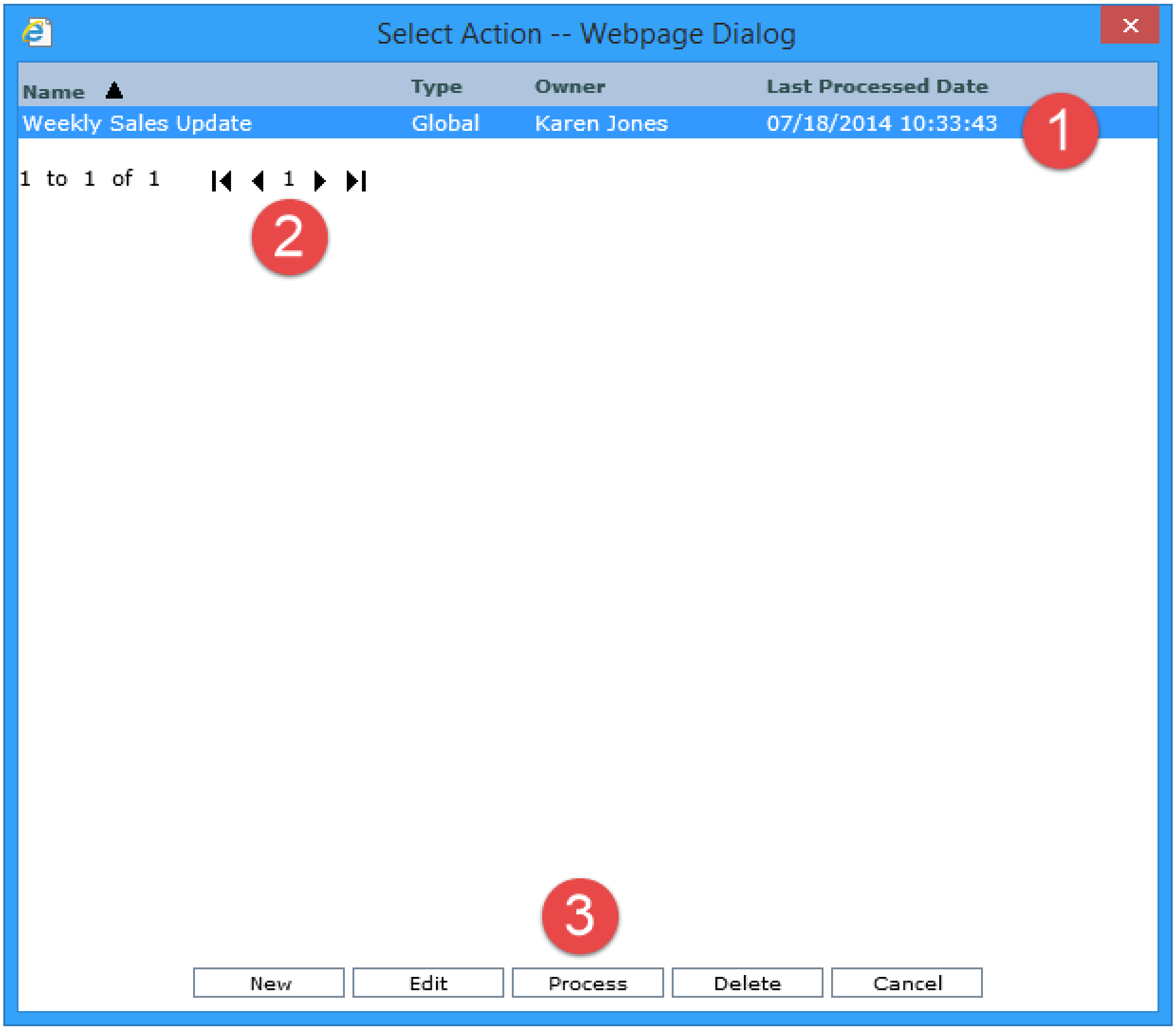
	 • Pop-up menus for views may include Run, New, Edit, Delete, Actions, and Web Part options. Pop-up menus for links are similar, excluding the Actions and Web Part options. 

Save View Distribution As Window



1	**Name and Description** - Specify the name for the new action. Adding a description is optional.
2	**Type** - Defaults to Personal and is disabled if you are an advanced user. View and security administrators can set the Type to Global or Personal.

Select Action Window

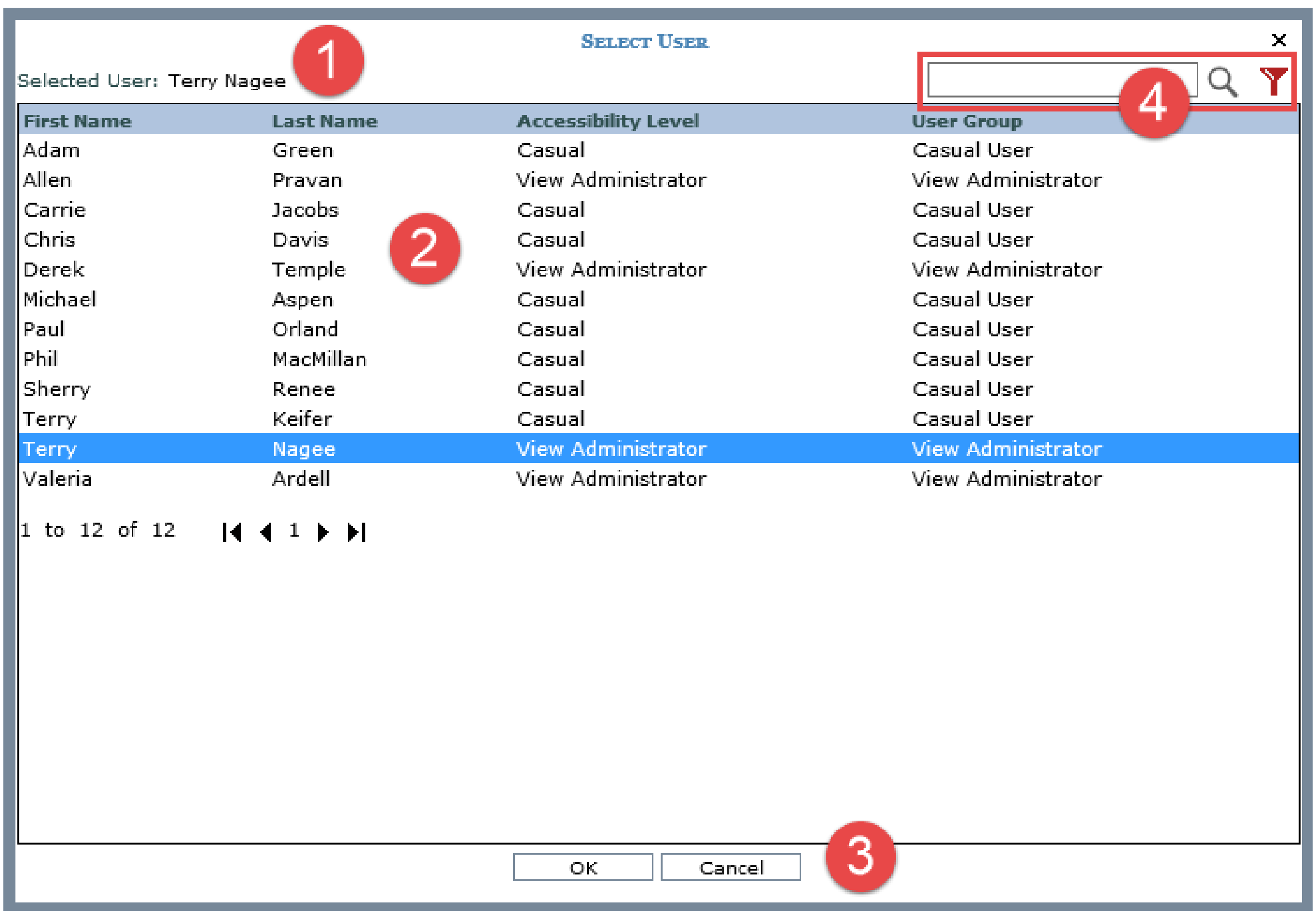


1	**Display Columns** – Sort and drag or drop columns to rearrange the window information. **Selecting Actions** – You can open an action for editing by double-clicking it or with a single click followed by clicking the Edit button. An Email action can be selected for interactive processing with a single click followed by clicking the Process button. One or more actions can be selected for deletion. To select multiple actions for deletion, use Ctrl+Click or Shift+Click to make your selections and then click Delete. **Note:** If you have multiple actions selected and happen to click Edit or Process, only the first selected action will be considered.
2	**Paging Controls** – Use the paging arrows and links to move between pages of actions. Controls are active only when there are multiple pages of actions. **Note:** For all windows that display lists (views, user lists, etc), there is a single administrative setting on the Application window that controls how many items display per page in a list.

3	**New** – Click to open the [View Distribution window]() and set up a new action. **Edit** – Select an existing action and click Edit or double-click it to open it for editing. The View Distribution window opens. Also use this option when you want to open an existing action to perform a Save As in order to create a new action. Advanced users can edit their own personal actions. View and security administrators can edit their own personal actions, other user's personal actions, and global actions. **Process** – Email actions can be processed either interactively using the Process button or scheduled for processing by your Action Administrator. For interactive processing, select an Email action, click Process, and then click OK in the prompt that displays to confirm that you want to continue with the process. If you need to process a File Share action, contact your Action Administrator, supply them with the Action ID, and ask them to schedule the action for processing. File Share actions must be scheduled for processing and cannot be processed interactively. **Note:** If you choose a File Share action in the Select Action window and click Process, you will be given a message that tells you to contact your Action Administrator about scheduling the action. **Delete** – Select one or more actions then click Delete to delete them. Advanced users can delete their own personal actions. View and security administrators can delete their own personal actions, other user's personal actions, and global actions. **Cancel** – Click to close the window without making any changes.

Select User Window

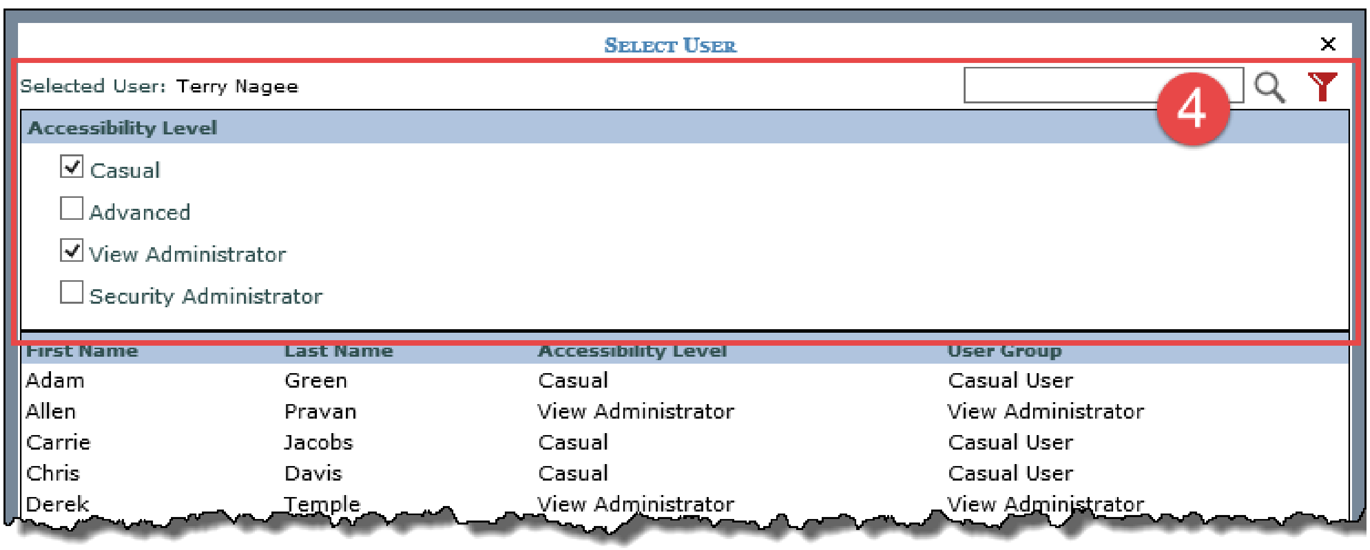
Main Window Sections



1	**Selected User** – The name of the user actively selected in the window displays here.
2	**Available Users** – Click a user then OK to select the user who will be an item owner. • By default, all users of all access types (casual, advanced, view administrator, or security administrator) will display in the window. You can search to find a user with a particular name or use the filter tool to look up only certain users (See [Search and Filter Features](#)). • To sort this list of users, click the First Name, Last Name, Accessibility Level, or User Group column heading. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange the list, click a column heading, drag it before or after another column heading, and drop it at the new location. • At the bottom of this section (you may need to scroll down), there is a count of how many users are displayed in the window. There are paging arrows to move between pages of users. Arrows are active only when more users exist than can be displayed in a single page of this section. 1 to 27 of 27 ⏮ ◀ 1 ▶ ⏭
3	**OK** – Click OK to apply the user selection made in this window and to close the window. **Cancel** – Click Cancel to close the window without applying your selection.

Search and Filter Features

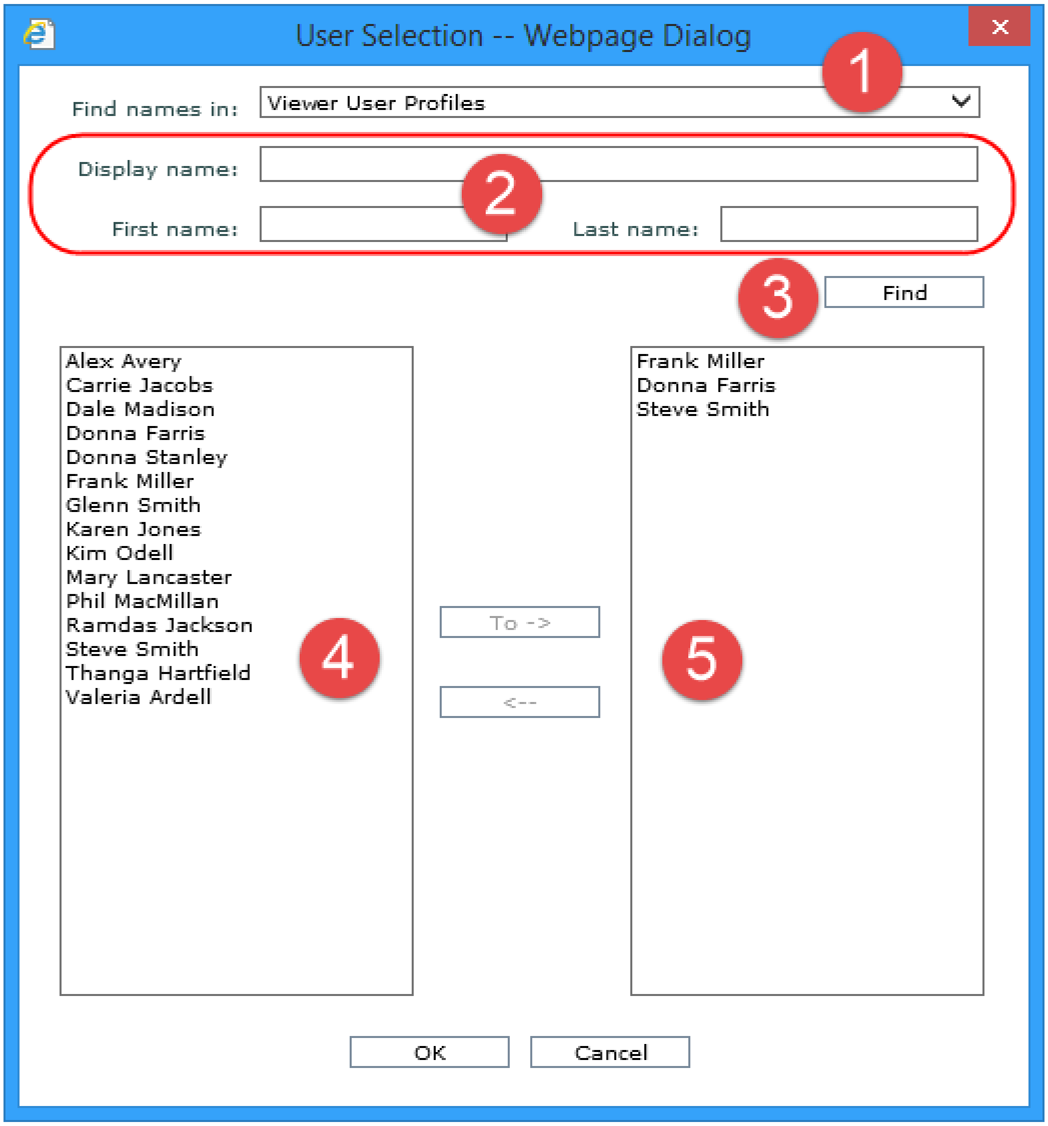
Optionally use the search and/or filter features (section marked '4' in following image) to look for particular users.



- **Search** – Enter all or part of the name(s) of the user(s) you are searching for and then click the Search button to execute the search.
- **Filter** – Click the provided button to use the filter feature. It acts as a toggle to show or hide the filter feature. Use the Accessibility Level checkboxes to filter out users by their access level (casual, advanced, view administrator, security administrator). Only users with the levels selected in the filter feature will display in the window.

Note: The filter toggle will be red if a filter has been applied.

User Selection Window

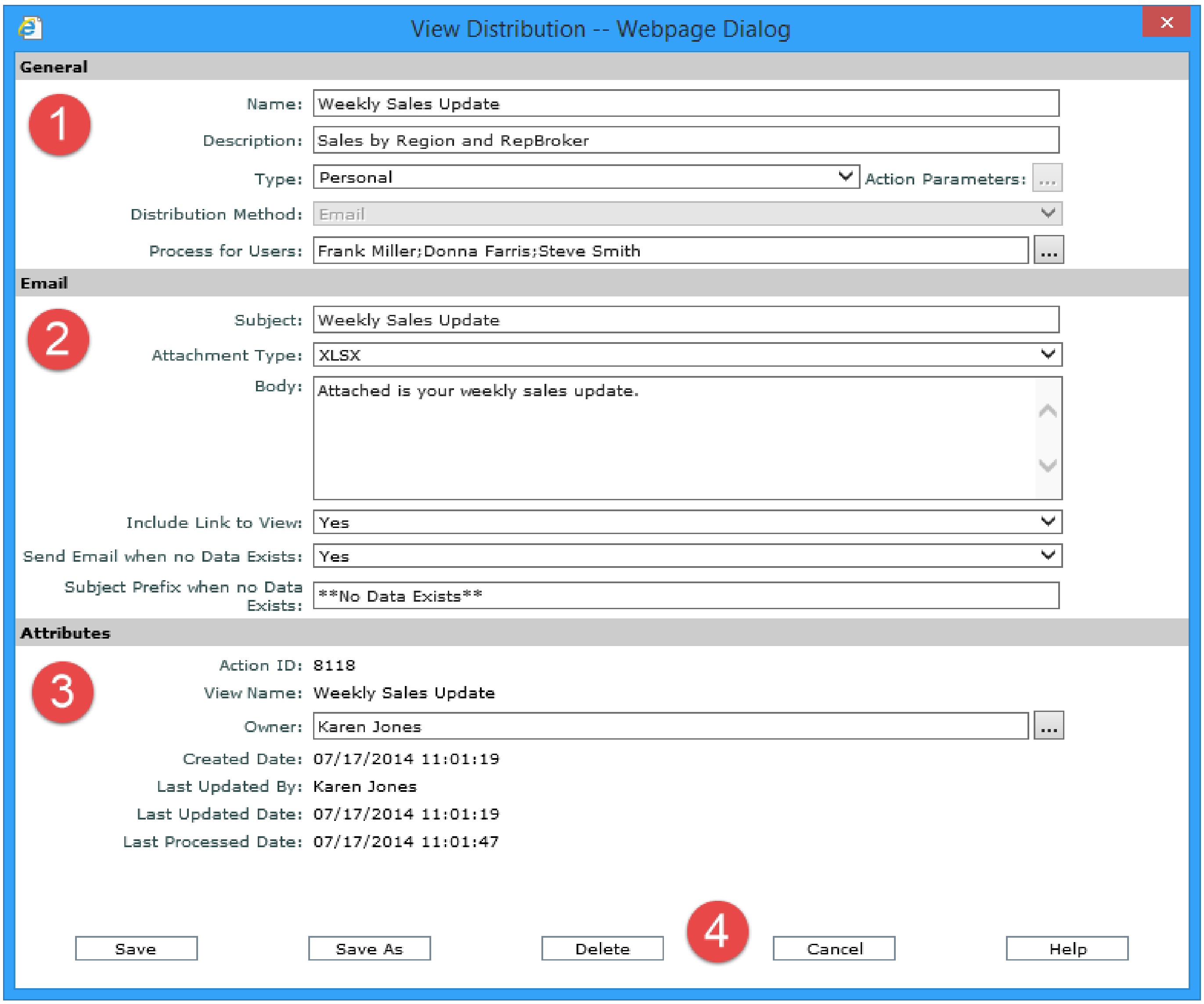


1	**Find names in:** - Use the drop-down selection list in combination with sections 2 and 3 of this window to search for users or user groups. Use the View User Profiles option to search for individual Stratum.Viewer users and the Viewer User Profile Groups option to search for Stratum.Viewer user profile groups. The group option is only available when you are working with Email actions.
2	**Display name:** - Names can be searched for and selected in the window to determine who to process the action for. These fields can optionally be used to enter criteria for searching for names from the option selected in the Find names in drop-down selection list. When Viewer User Profile Groups is selected, only the Display name field is enabled. Otherwise all three fields are enabled. **First name** – To further filter your search, enter a first name, the first letter of the first name, or the first few letters of a first name. That populates the search results area with recipients with that first name or with a first name that begins with the specified text. **Last name** – To further filter your search, enter a last name, the first letter of the last name, or the first few letters of a last name. That populates the search results area with recipients with that last name or with a last name that begins with the specified text.
3	**Find** - After entering search criteria, click Find and results will be returned in the lower, left portion of the window. If the fields are left blank, all user or user groups (depending on your selection in the

	Find names drop-down list) will be returned once the Find button is clicked.
4	This section is populated with names once Find is clicked. Highlight name(s) to select and click the right facing arrow [To ->] to select the users or groups for the action. You can also double-click a name.
5	This section shows the users or groups selected for the action. If you are working with a File Share action, you will only be permitted to choose a single user. To remove users or groups from an action, highlight their name and click the left facing arrow [<--] . You can also double-click a name.

View Distribution Window

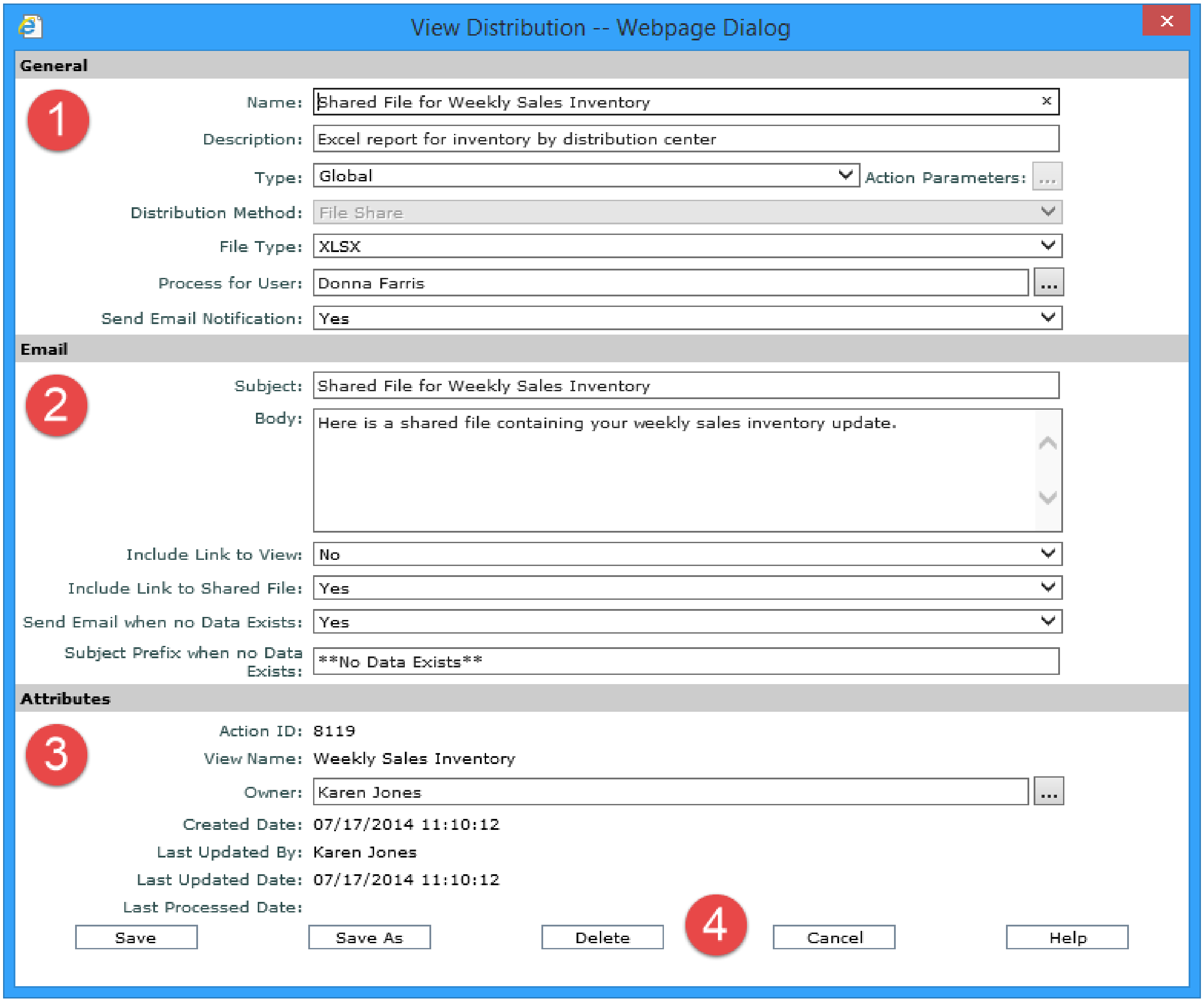
Email Actions



1	**General** – Use this section to enter the action name and description and to determine if the action will be global or personal. Choose Global as the Type to make the action global or Personal to make it personal. That Type drop-down lost will be disabled and default to Personal when advanced users are using the window. • **Distribution Method** – To set up an Email action, choose Email for the distribution method.

	This means that the view results will be distributed via email. This drop-down list will be disabled once you save a new action. • **Process for Users** – You select Viewer users or user groups by clicking the Browse button next to the Process for Users field. A User Selection window opens for that purpose. The action can be processed for one or more Stratum.Viewer users, one or more Stratum.Viewer user profile groups, or a combination of individual users and groups. The action results created for each user will be based on their role in Stratum.Viewer. Since view results are based on the role, only Stratum.Viewer users and user groups can be selected as action recipients. See also Considerations when Creating Actions for Personal Views and Considerations when Selecting Action Recipients. • **Action Parameters** – This button is only enabled when there are parameter groups and parameters defined for the associated view. When enabled, you can click the button to choose the parameter values for the action. An Action Parameters window opens for that purpose. See also Using Parameters to Control Action Results.
2	**Email** – Use to set up properties for the emails that will be generated by the action. Subject defaults to the view name and Body defaults to the view description. Other email properties are defined below. • **Attachment Type** – Choose XLSX if you want the view results delivered as an MS Excel attachment to the email (recommended for larger views). Or choose Include as Text if you want the view results to display in the body of the email. • **Include Link to View** – Choose Yes if you want a link to the view included in the body of the email. If you choose No, the link will be excluded. **Note**: If the view associated with the action is a personal view, advanced users will not be able to access the view via this link. Consider using a global view or not including the link. • **Send Email when no Data Exists** and **Subject Prefix when no Data Exists** – Choose Yes if you want an email generated to users even in cases where there is no data to send to a designated user. For example, if there are no rows and columns returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than $40,000. If you choose No, then no email is sent when no rows or columns exist in the view results for a user. If you choose Yes and no rows or columns exist in the view results for a user, the prefix defined in the Subject Prefix when no Data Exists field will be used in the email subject line before the rest of the Subject field text. Defining a prefix is optional.
3	**Attributes** – This section shows the ID for the action, name of the view for the action, who created or updated the action, and when it was last processed. When you create an action, the ID is automatically generated by Stratum.Viewer. If an action will be scheduled for processing rather than interactively processed, you will need to provide the ID to your Action Administrator. Email actions can be processed either by scheduled processing or interactively from the Select Action window. File Share actions must be scheduled. See Scheduled Actions Overview, Parameters, and Examples for details about scheduled processing. Administrators can use the Owner property in this section to change the owner of an action. The property will be disabled when advanced users are using this window.
4	**Save and Save As** – Use to save the current action or to perform a Save As to create a new action based on the current one. The Save button is disabled when advanced users are viewing global actions. **Delete** – Click to delete the current action. This button is disabled when advanced users are viewing global actions. **Cancel** – Click to close the window without making any changes. **Help** – Click to access Actions help information.

File Share Actions



<table>
<tr>
<td>1</td>
<td>
General – Use this section to enter the action name and description and to determine if the action will be global or personal. Choose Global as the Type to make the action global or Personal to make it personal. That Type drop-down list will be disabled and default to Personal when advanced users are using the window.

Distribution Method – To set up a File Share action, choose File Share for the distribution method. This drop-down list will be disabled once you save a new action. The File Type property will automatically be set to XLSX.
Process for User – You select the user by clicking the Browse button  next to the Process for User field. A User Selection window opens for that purpose. Actions with a distribution method of File Share can only be processed for a single user. That user’s role will determine the results in the file share output from the action. Since the file share output is created based on the selected user’s role, only a Stratum.Viewer user can be specified. See also <u>Considerations when Creating Actions for Personal Views</u> and <u>Considerations when Selecting Action Recipients</u>.
Send Email Notification – Choose Yes if you want the user to receive an email notice each time the File Share action is processed. If you choose No, the Email section will be disabled and no email notification will be sent.

</td>
</tr>
</table>

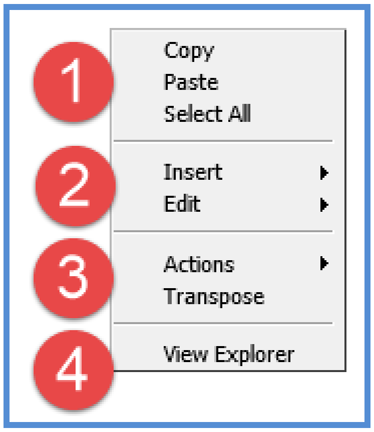
	• **Action Parameters** – This button is only enabled when there are parameter groups and parameters defined for the associated view. When enabled, you can click the button to choose the parameter values for the action. An Action Parameters window opens for that purpose. See also Using Parameters to Control Action Results.
2	**Email** – This section is only enabled when the Send Email Notification property is set to Yes. Use the section to set up properties for the email that will be generated each time the File Share action is processed. Subject defaults to the view name and Body defaults to the view description. Other email properties are defined below. • **Include Link to View** – Choose Yes if you want a link to the view included in the body of the email. If you choose No, the link will be excluded. **Note**: If the view associated with the action is a personal view, advanced users will not be able to access the view via this link. Consider using a global view or not including the link. • **Include Link to Shared File** – Choose Yes if you want a link to the shared file included in the body of the email. If you choose No, the link will be excluded. • **Send Email when no Data Exists** and **Subject Prefix when no Data Exists** – Choose Yes if you want an email generated to the user in cases where there will be no data in the resulting shared file. If you choose No, then no email will be generated for no data cases. If you choose Yes and a no data case occurs, the prefix defined in the Subject Prefix when no Data Exists field will be used in the email subject line before the rest of the Subject field text. Defining a prefix is optional.
3	**Attributes** – This section shows the ID for the action, name of the view for the action, who created or updated the action, and when it was last processed. When you create an action, the ID is automatically generated by Stratum.Viewer. If an action will be scheduled for processing rather than interactively processed, you will need to provide the ID to your Action Administrator. Email actions can be processed either by scheduled processing or interactively from the Select Action window. File Share actions must be processed via scheduling. See Scheduled Actions Overview, Parameters, and Examples for details about scheduled processing. Administrators can use the Owner property in this section to change the owner of an action. The property will be disabled when advanced users are using this window.
4	**Save and Save As** – Use to save the current action or to perform a Save As to create a new action based on the current one. The Save button is disabled when advanced users are viewing global actions. **Delete** – Click to delete the current action. This button is disabled when advanced users are viewing global actions. **Cancel** – Click to close the window without making any changes. **Help** – Click to access Actions help information.

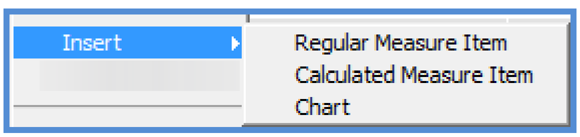
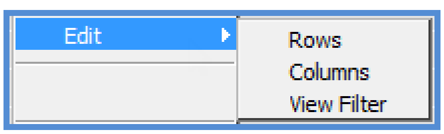
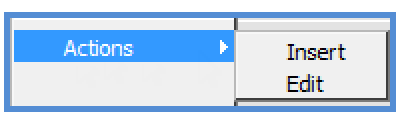
View Explorer Pop-up Menus

Right-click folders in view explorer or objects within them to display actions that you can take such as viewing the properties, hiding or showing objects, inserting measure items or charts, and so forth. Many of the functions can also be controlled through the grid and its pop-up menus, giving you several ways to make changes. From view explorer, you can make many consecutive actions and then apply them all at once. Menus described on the following pages are presented in order of the folder order in view explorer.

General Pop-up Menu

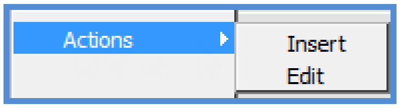
Right-click the background of view explorer to see general actions that you can take on the view.



1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. **Select All** - Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Charting Data Wizard will display when inserting a new chart.  **Edit** - Edit the hierarchies on the rows, columns, or view filter. 
3	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.  **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.
4	**View Explorer -** This option allows you to open and close view explorer. If a Properties window is open when you close view explorer, the Properties window will also close.

View Name Folder Pop-up Menu

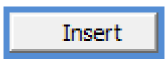
Right-click the view name (or "New View" for views not named yet) to display actions you can take.

<table>
<tr><td>1</td><td>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.


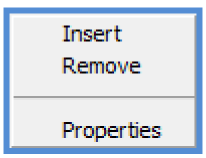
Properties – Click to maintain overall view properties such as the name, description, and view group.</td></tr>
</table>

Parameter Groups Folder, Parameter Groups, and Parameters Pop-up Menus

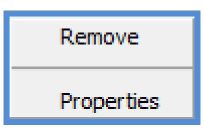
Right-click the Parameter Groups folder and select Insert to insert a new group.



Right-click the name of a parameter group to display actions that you can take on the group, which include inserting a parameter, removing the group, or maintaining the properties for the group.



Right-click a parameter within a group to display actions that you can take on the parameter, which include removing it or maintaining its properties.



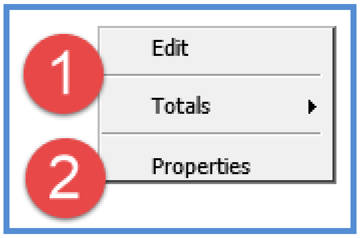
Grid Folder Pop-up Menu

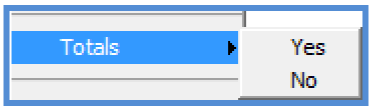
Right-click the Grid folder to display actions that you can take related to the overall grid.

1	**Show or Hide** - Choosing Hide will hide the grid. If a chart is attached and visible, the chart will still show. Choose Show to display the grid again.
2	**Properties -** Click to maintain the grid properties including whether rows and columns display all in a single page or one page at a time.

Rows Folder and Columns Folder Pop-up Menus

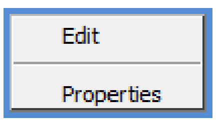
Right-click the Rows or Columns folder to display actions that you can take on the respective rows or columns axis.



1	**Edit** - Edit the hierarchies on the selected folder -- either rows or columns. **Totals** - Control whether totals are displayed for all levels on the axis by choosing Yes or No. The Totals Default property in the Properties window for the axis also changes to reflect your choice, as does the Totals property in the Properties window for each level on that axis. 
2	**Properties -** Click to maintain the rows or columns properties including repeating values and the others summary.

View Filter Folder Pop-up Menu

Right-click the View Filter folder to edit the hierarchies in the View Filter section of the view or to maintain its properties.



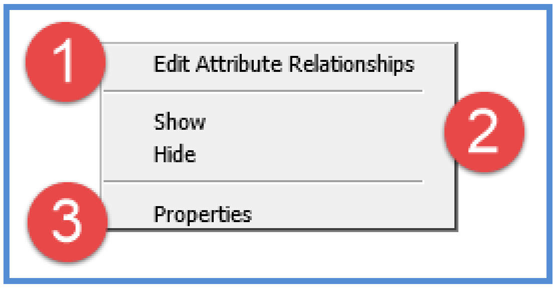
Hierarchies Pop-up Menu

Right-click a hierarchy to display actions that you can take on it.

1	**Remove** - This option removes the hierarchy and all its levels from the view. To add it back, you would need to use the Edit Hierarchies window. **Show or Hide** - Choosing Hide will hide the hierarchy and therefore all its levels. Choose Show to display the hierarchy and levels again.
2	**Properties -** Click to view the dimension to which the hierarchy belongs.

Levels Pop-up Menu

Right-click a level to display actions that you can take on it.



1	**Edit Attribute Relationship** - Edit (add or remove) the attribute relationships that will be available in the view for the level.
2	**Show or Hide** - Choosing Hide will hide the level. Choose Show to display the level again.
3	**Properties -** Click to maintain the level properties including filters, sorts, totals, and display text.

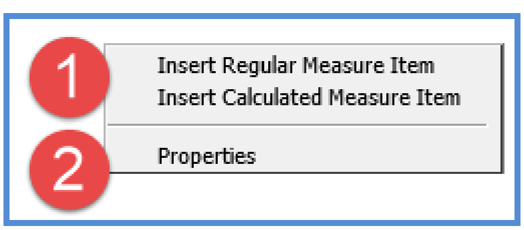
Attribute Relationships Pop-up Menu

Right-click an attribute relationship to display actions that you can take on it.

1	**Remove** - This option removes the attribute relationship from the view. To add it back, you would need to use the Edit Attribute Relationships window. **Show or Hide** - Choosing Hide will hide the attribute relationship. If you plan on using the attribute relationship as the display text for the level, you should hide the attribute relationship. Choose Show to display the attribute relationship again.
2	**Properties -** Click to maintain the attribute relationship properties including sorts.

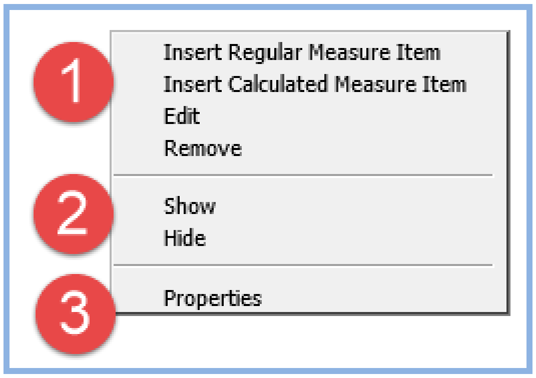
Measure Items Folder and Individual Measure Items Pop-up Menus

Right-click the Measure Items folder to display actions that you can take on the measure items axis or to control the Time Range property for the view.



1	**Insert Regular Measure Item** - Opens the Insert Measure Item window for inserting a new regular measure items and opens a Properties window for the new measure item. **Insert Calculated Measure Item -** Opens the Expression window for inserting a new calculated measure items and opens a Properties window for the new measure item.
2	**Properties -** Click to maintain the properties for the measure items axis, such as which axis measure items will be displayed and whether the Time Range property will be Yes or No.

Right-click an individual measure item to display actions that you can take on it or to insert new measure items.

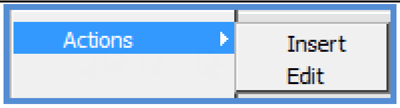


1	**Insert Regular Measure Item** - Opens the Insert Measure Item window for inserting a new regular measure items and opens a Properties window for the new measure item. **Insert Calculated Measure Item -** Opens the Expression window for inserting a new calculated measure items and opens a Properties window for the new measure item. **Edit** - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens the Expression window so you can edit the measure item expression. **Note:** Another way to access the Edit Measure Item window or Expression window is to double-click the caption of the respective regular or calculated measure item in the view grid. **Remove** - Removes the measure item from the view definition. Any measure items dependent on the removed measure item also will be removed from the view, but you will be warned that those will also be removed.
2	**Show or Hide** - Choosing Hide will hide the measure item. Choose Show to display the measure item again.
3	**Properties -** Click to maintain the measure items properties including caption, filter, sorts, totals, and format string.

Presentation Folder Pop-up Menu

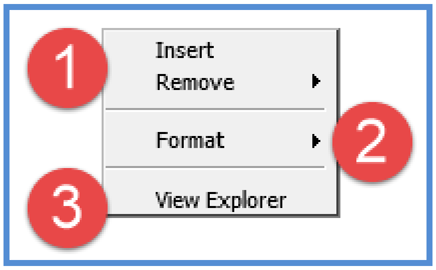
Right-click the Presentation folder display actions you can take on it.

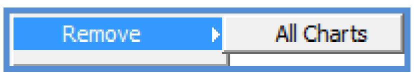
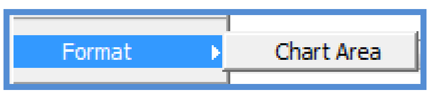
1	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.

	 **Properties** – Click to maintain Presentation properties such as setting the default presentation type to Viewer or Excel.

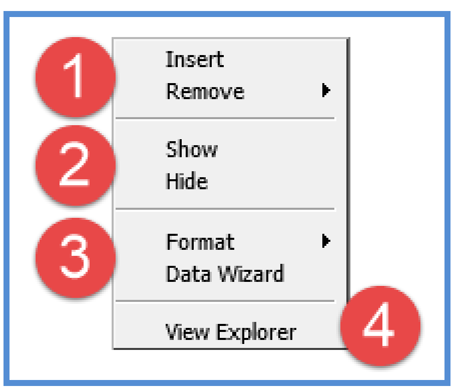
Charts Folder and Individual Charts Pop-up Menus

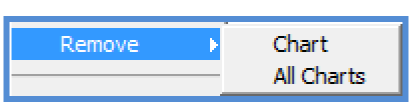
Right-click the Charts folder to display actions that you can take on it.

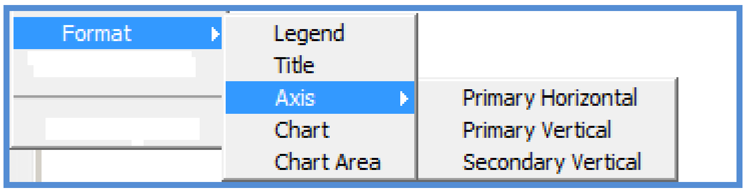


1	**Insert** - Click to insert a new chart. The Chart Data Wizard opens for setting up the chart. **Remove** - Click and select the All Charts option to remove all charts attached to the view, whether hidden or visible. Remove option is only available if a chart is included in the view definition. 
2	**Format** - Click and select the Chart Area option to change the formatting for the entire area where all charts display. The Format Chart Area window opens. 
3	**View Explorer -** Click to close view explorer.

Right-click an individual chart to display actions that you can take on it or to insert new charts.



1	**Insert** - Click to insert a new chart. The Chart Data Wizard opens for setting up the chart. **Remove** - Click and select the Chart option to remove only the selected chart. Or select the All Charts option to remove all charts attached to the view, whether hidden or visible. 

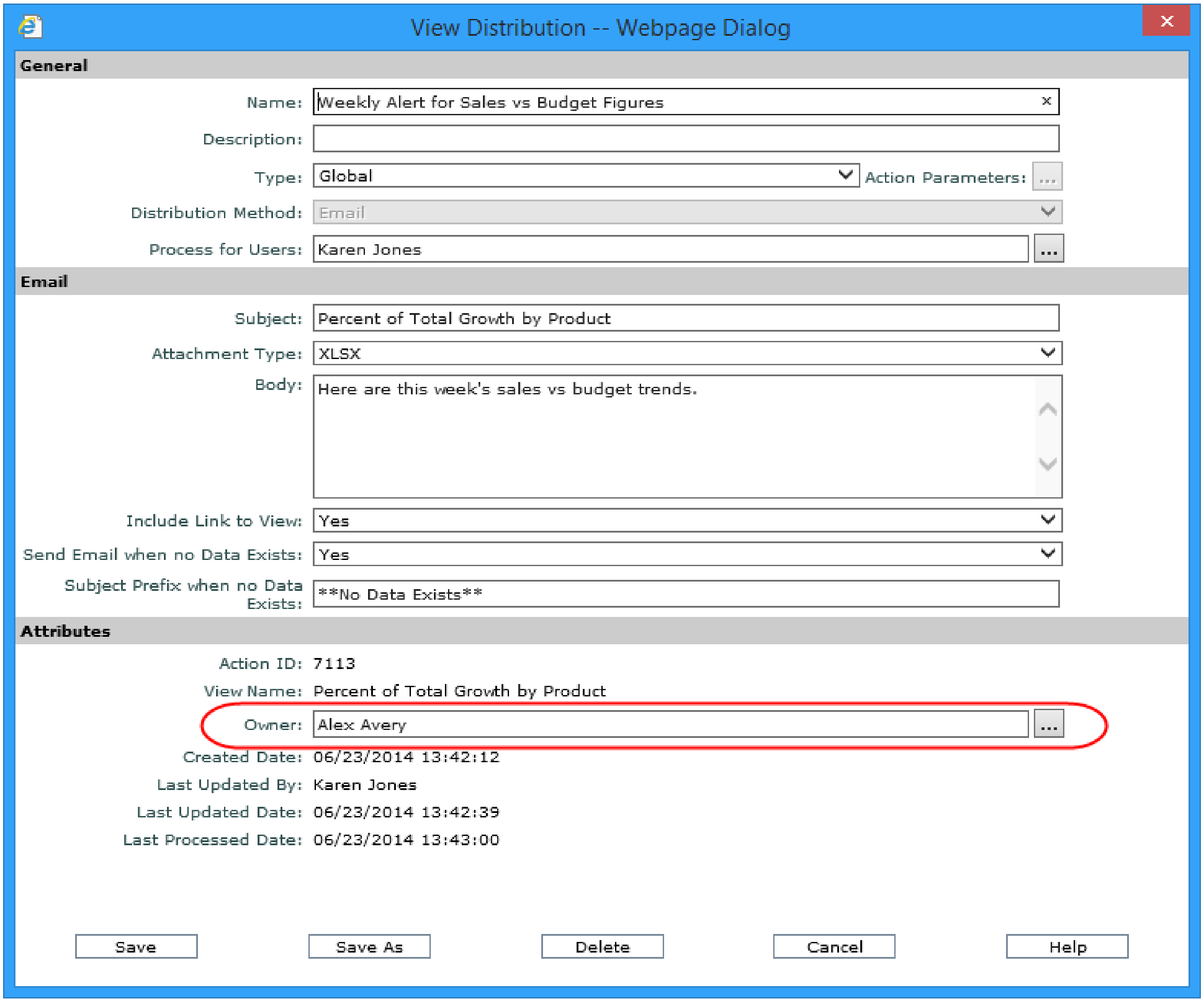
2	**Show or Hide** - Choosing Hide will hide the chart. If the grid is visible, it will remain even when the chart is hidden. Choose Show to display the chart again.
3	**Format** - Click and select from the provided sub-menu to edit formatting for the selected chart. The applicable window will display. • **Legend** - Opens the Format Chart Legend window. • **Title** - Opens the Format Chart Title window. • **Axis** - Options are provided for accessing the windows to edit the applicable axis for the chart -- Primary Horizontal, Primary Vertical, or Secondary Vertical. Not all charts have a secondary axis. • **Chart** - Opens the Format Chart window. • **Chart Area** - Opens the Format Chart Area window.  **Data Wizard** - Click to access the Chart Data Wizard for editing basic aspects of the chart such as the types, series or data points.
4	**View Explorer -** Click to close view explorer.

Advanced Concepts

Change the Owner of an Action

View and security administrators can change the owner of any action. The Select User window is used to change the owner.

1. In the left panel, locate the view to which the action is attached, right-click the view name, and select Actions then Edit.
2. From the Select Action window, click the name of the action then click Edit (or double-click the action name).
3. In the Attributes section of the View Distribution window, click the Browse button ... for the Owner property.
4. In the Select User window, click the name of the new Owner for the view, and then click OK in that window. You can narrow down the users that display for selection in the window using the search and/or filter tools.
5. Click Save.



Considerations when Selecting Action Recipients

The user(s) selected as recipients of actions should be users who will be able to see the data in the view. Keep that in mind as you are selecting users for an action's Process for User(s) property. When making your selections in the User Selection window, keep in mind the role of the user. Consider which members and measure items the user's role permits them to see. A user will only see the date that their role permits them to see in action results for a view. If a view doesn't contain any data that a user's role would allow them to see, then consider excluding that user when selecting action recipients.

Customizing the Subject Prefix for “No Data Exists” Action Emails

Administrators can control the default subject prefix for action emails generate as a result of no data exists cases. Changing the application default will only impact actions set up after that change. Existing actions will not be impacted by changes to the application default.

Users who are creating actions can leave the prefix set to the application default or customize the prefix as they set up individual actions.

Other things to note about a prefix:

- Specifying a prefix is optional.
- The prefix is only used in cases where a user who created an action opted to have an action email generated even when there will be no data to send to a designated user (Email action) or when there will be no data in the resulting shared file (File Share actions).

Customize for a Specific Action

1. Access the View Distribution window for the action.

2. Use the Subject Prefix When no Data Exists field in the Email section to edit the prefix.

Note: If you are working with File Share actions, the Email section will only be enabled if the Send Email Notification property is set to Yes.

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3. Save the action.

Customize the Application Default

1. Click Application in the Admin Utilities view group.

2. Scroll to the Actions section of the Application window.

3. Use the Subject Prefix When no Data Exists field to edit the prefix.

4. Save the changes.

Using Parameters to Control Action Results

Action parameters are a means of controlling what values display for view results generated by an action. Action parameters are available when the view you are working with has parameters defined for it. All the parameter groups and parameters defined for a view can be used to select a specific member(s), user list, or expression for filtering the action results. The Action Parameters window will display the same items as the View Prompt window excluding the Presentation Type section.

The values you choose for view parameters and the values you choose for an action will function independently from one another. Changing the value for a view parameter, for example, will not change the values you selected for an already-saved action parameter. However, if you remove a parameter group or individual parameter from a view, then the item will be removed from the Action Parameters window as well.

Note: Action parameter functionality is disabled when the view you are working with doesn't have parameters.

Here are the steps for defining action parameters, followed by an example. Skip the first step if you already have the View Distribution window open for an action.

1. In the left panel, right-click the name of the view for the action and select Actions then Edit.

   OR

1. If the view is open, right-click anywhere and select Actions then Edit.

2. Click the Action Parameters button to open the Action Parameters window.

3. Choose a value(s) using the provided drop-down list or filter icon.

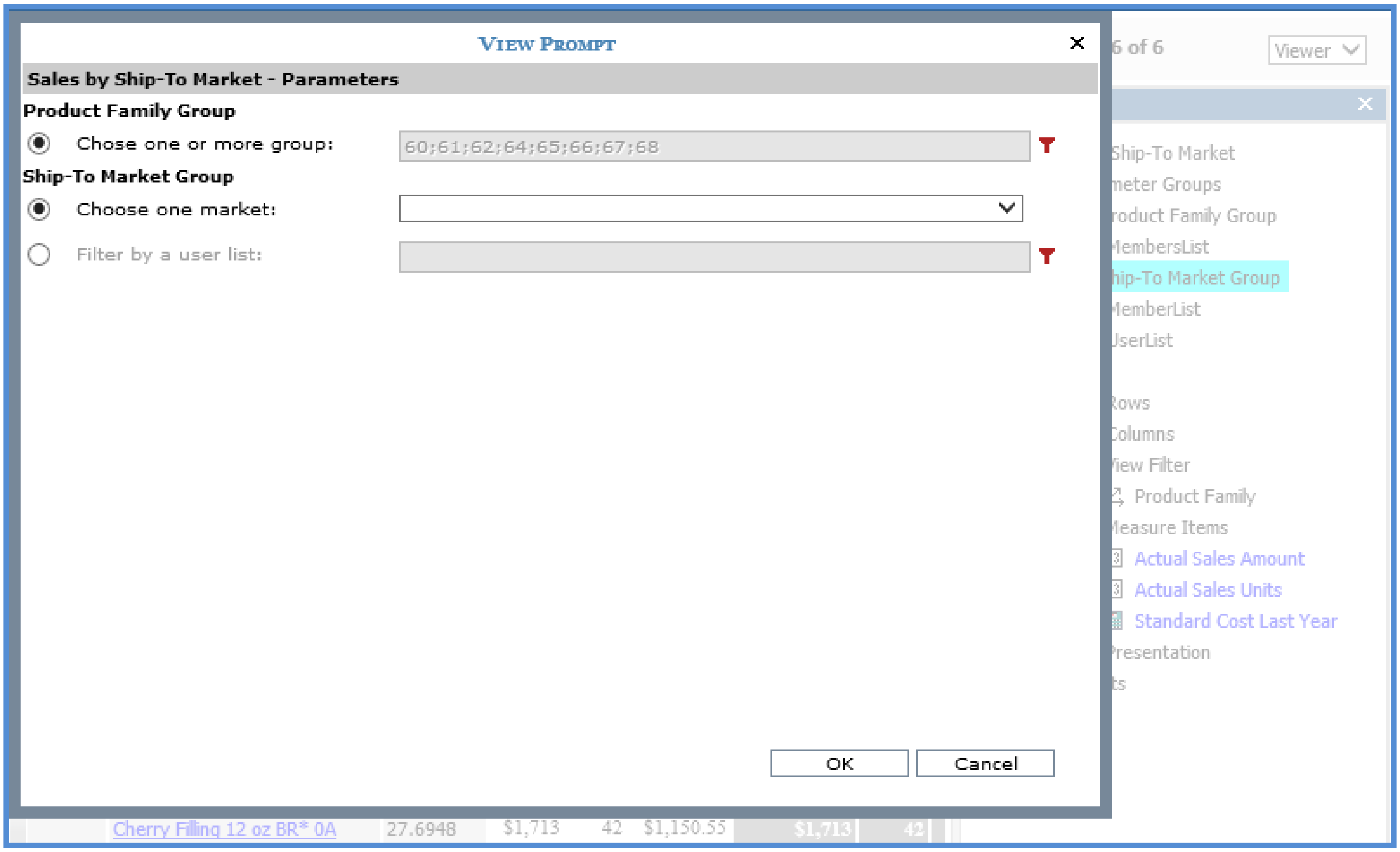
   - There will be a drop-down list for Drop Down parameters. Select a member.
   - There will be a filter icon for other parameter types:
     - **Select Members** - icon opens the Select or Advanced Select Members window. Search for and select one or more members then click OK.
     - **User List** - icon opens the Select User List Filter window. Use the search or filter tools as aids in finding a list. Optionally click Show Details after selecting a list to see more information about it before applying it as a filter. Click OK to apply the selected list as a filter.
     - **Expression** - icon opens the Expression window. Set up an expression and click OK.

4. The selected value(s) will display in the parameter field.

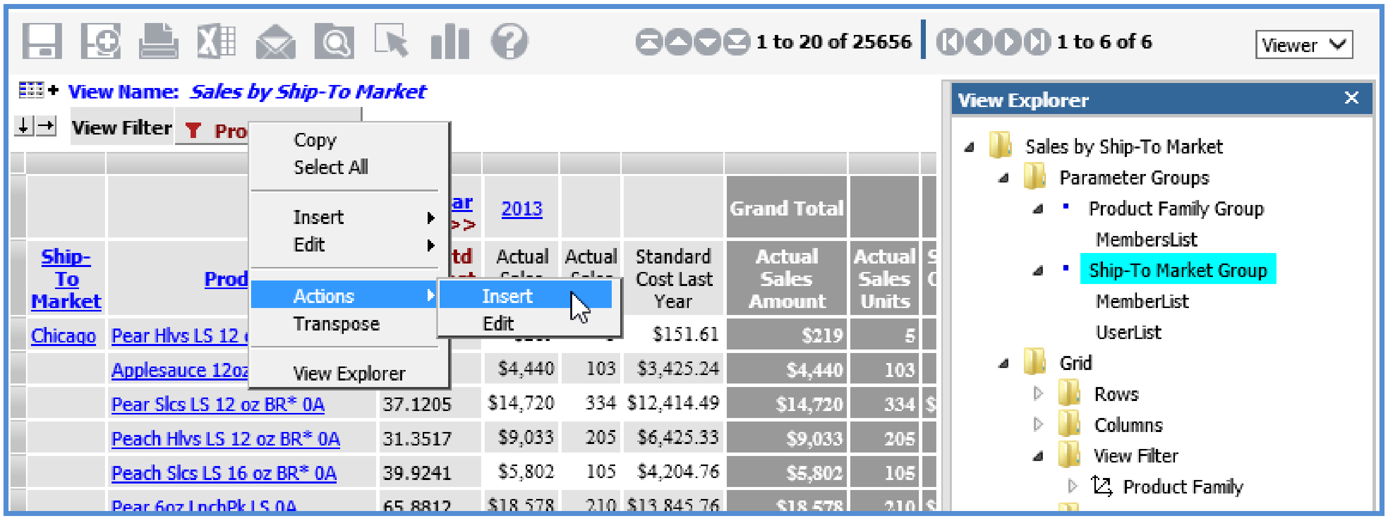
5. Click OK in the Action Parameters window.

Example

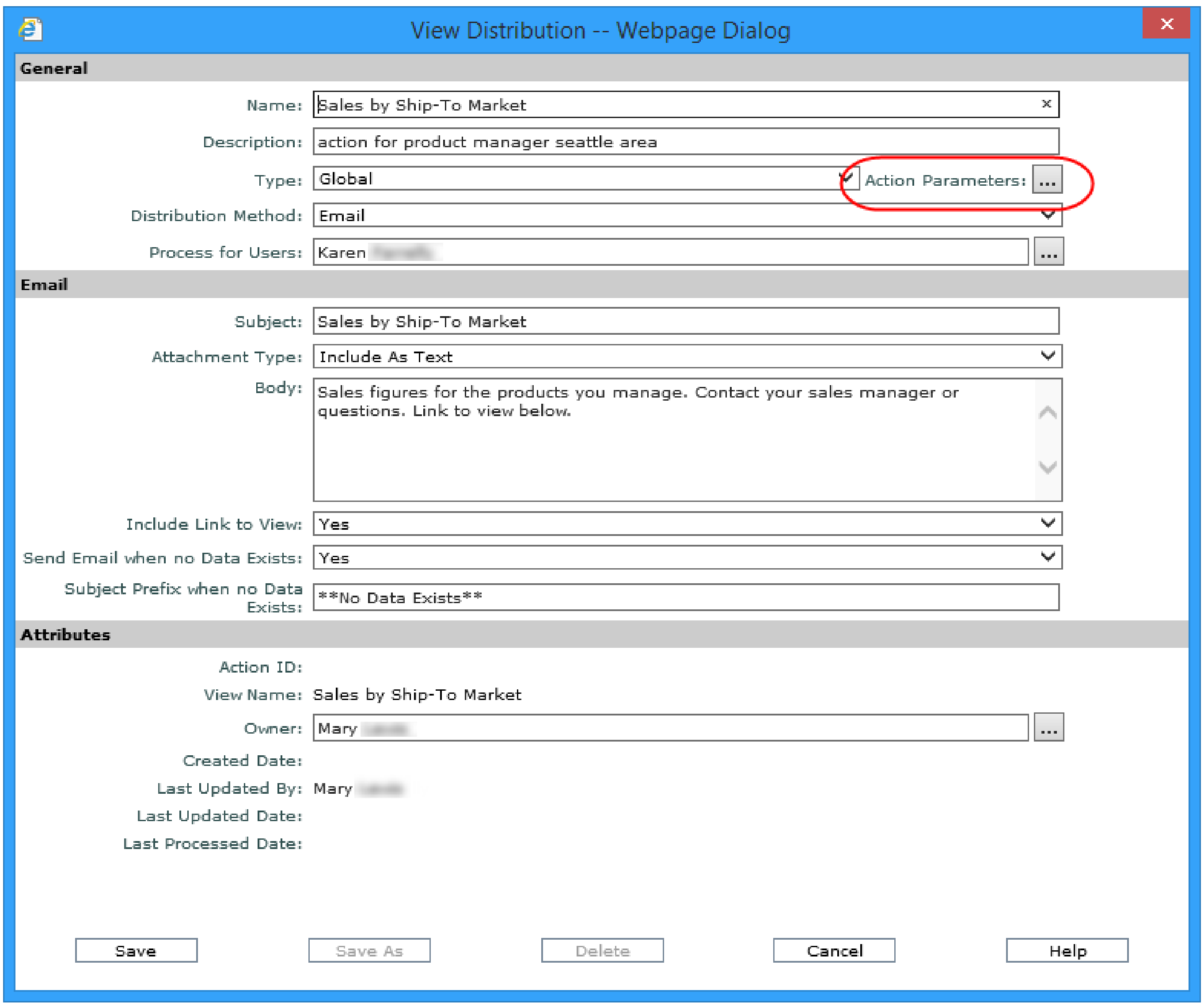
The user runs a Sales by ShipTo Market view, which has parameters defined for the Product Family and ShipTo Market levels. The user left the View Prompt window in its default state and ran the view. This will result in the view being filtered by Product Family members 60 through 68.



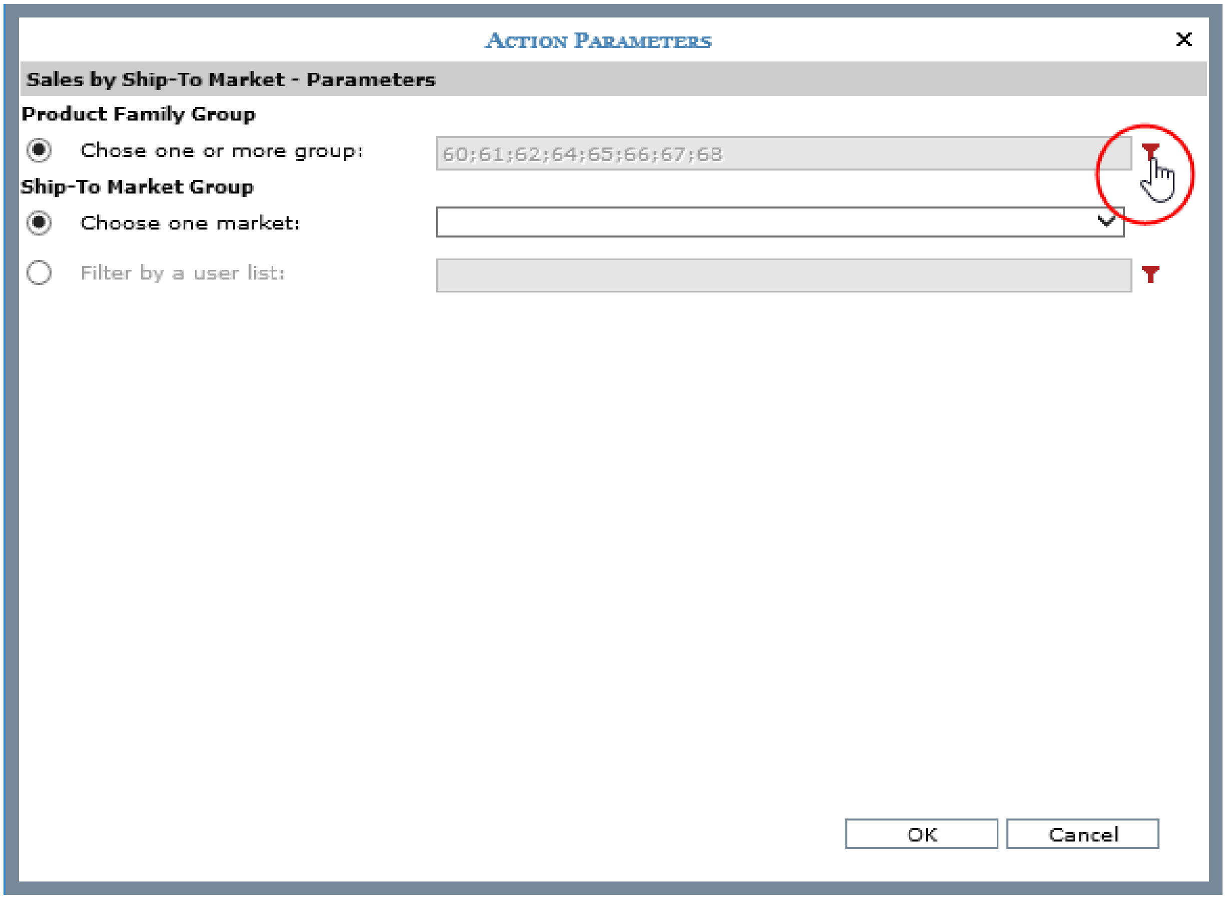
In the resulting view, the user right-clicks and selects Actions then Insert to set up a new action.

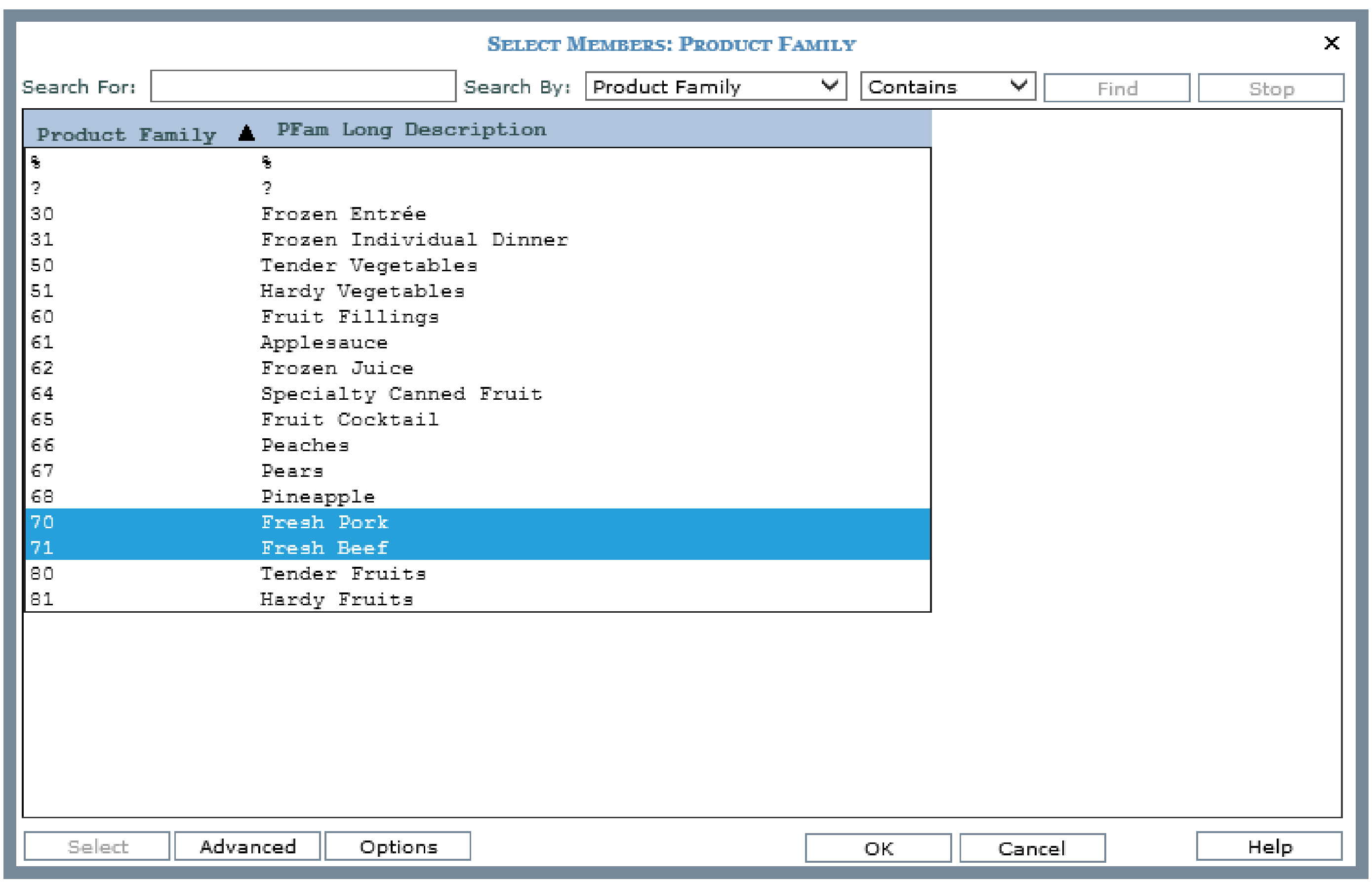


The user sets up properties for an Email action that will include a link to the view and will include action results as text in the action email. Then the user clicks the Action Parameters button ... .

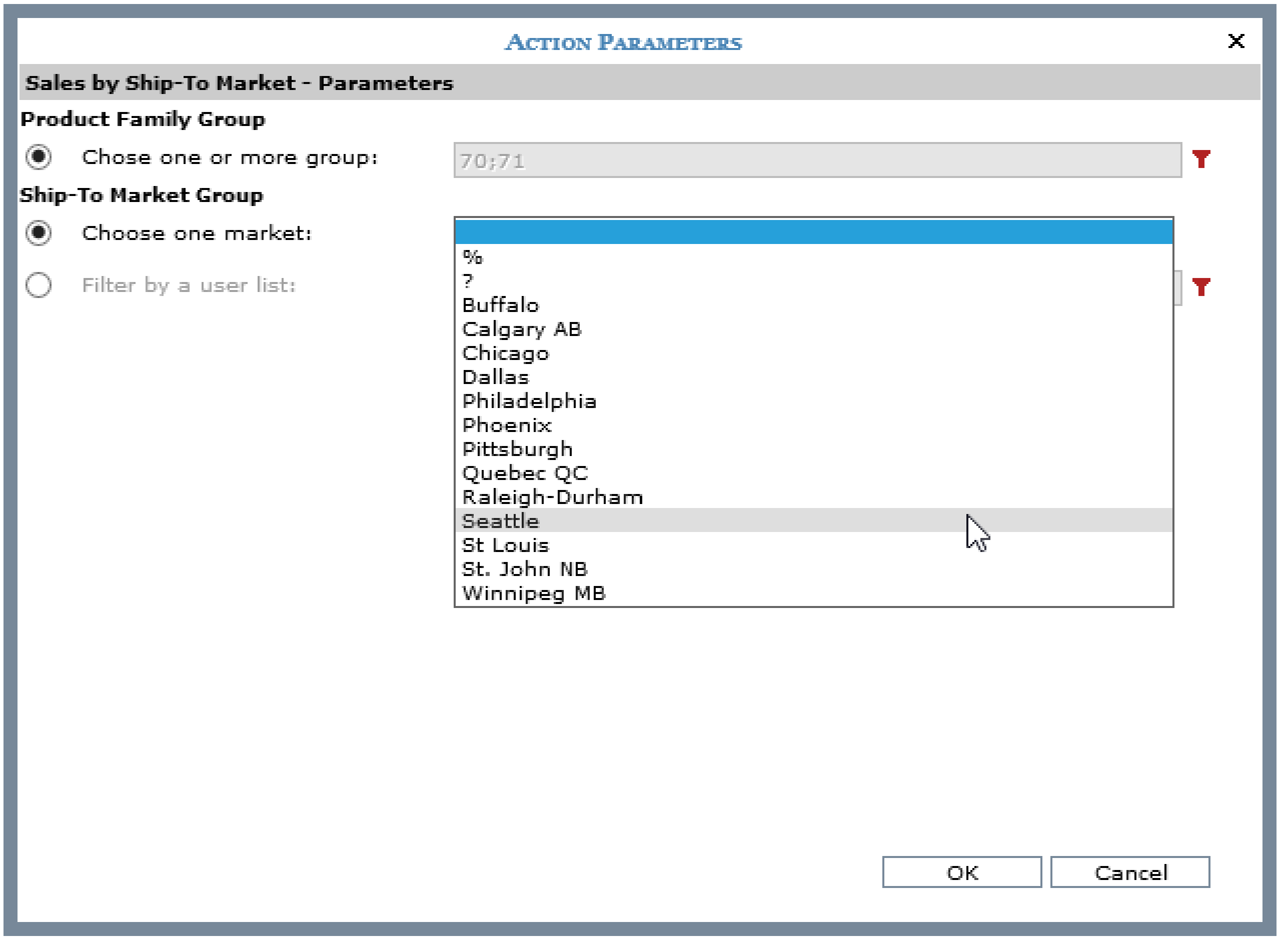


The user accesses the Select Members window to choose Product Families 70 and 71.

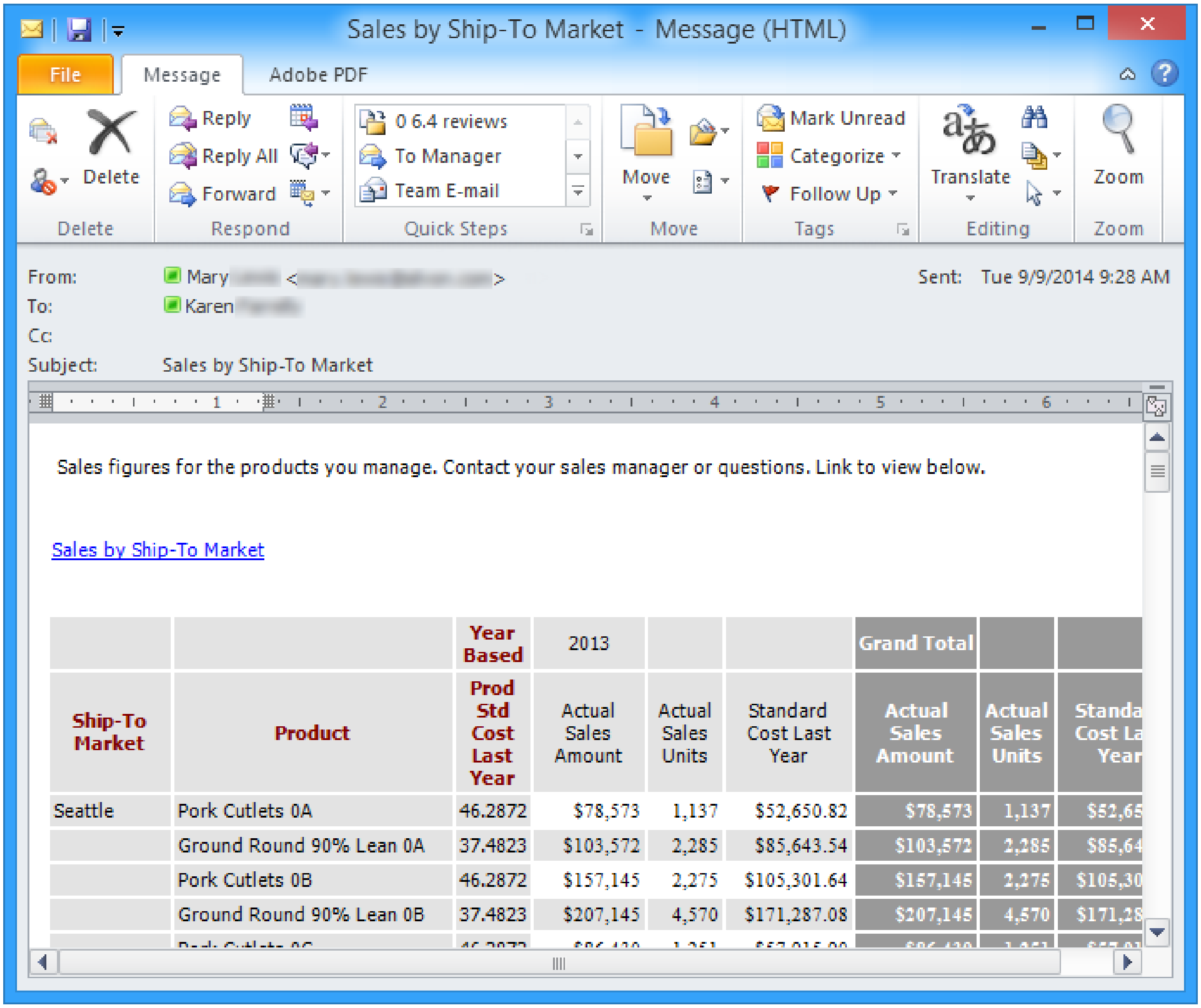




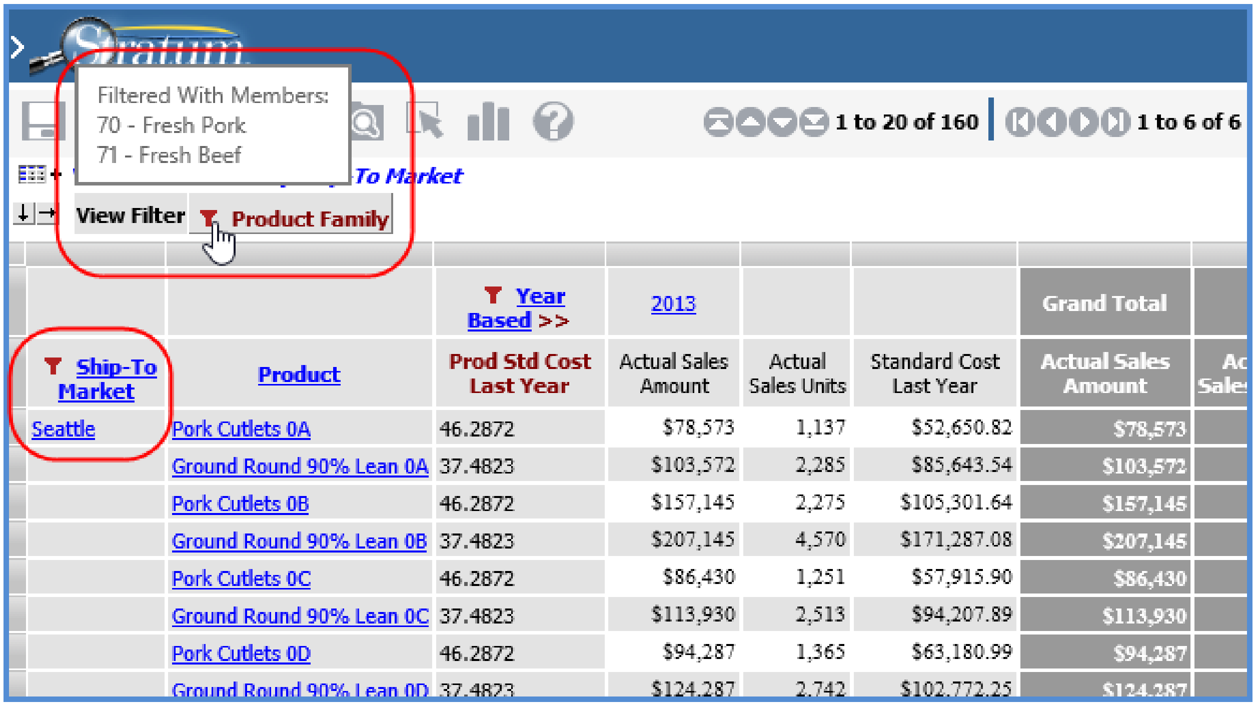
Back in the Action Parameters window, the user chooses ShipTo Market Seattle.



The user saves the action with those action parameters and then processes the action. The results in the action email are filtered by the selected action parameters.



When the recipient clicks the link in the email, the resulting view also is filtered by the action parameter values.



Scheduled Actions Overview, Parameters, and Examples

Email and File Share actions can be scheduled for processing using the Action Processing application. The application resides in the Stratum.Viewer bin folder and can be initiated a variety of ways including through scheduled tasks on the Stratum.Viewer server. The application is an executable file named Silvon.ViewActionProcess.exe.

In the remainder of this section, we will refer to the person responsible for scheduling actions as the Action Administrator. Also, we will refer to the related User Account that is specified for executing the scheduled actions as the Action Processing Account. Emails generated by scheduled actions will be from the Action Processing Account.

Notes: The Action Administrator doesn't need to have a Stratum.Viewer user profile.

Email actions can be processed either by scheduled processing or interactively from the Select Action window. File Share actions must be processed via scheduling.

Parameters

The Action Processing application has the following parameters. Important guidelines to consider while using them:

- A space or colon (:) must be used in between each parameter when multiple parameters are used.
- Parameters can be specified in any order.
- For Email actions, the only required parameter is /ViewActionId.
- For File Share actions, the required parameters are /ViewActionId and/FileShareFile.

Parameter	Purpose	Required?
/ViewActionId=	Specifies the action ID to be processed. Can be found in the Attributes section of the View Distribution window.	Yes for both Email and File Share actions.

/FileShareFile=	Determines the location***** and name of the shared file.	Yes for File Share actions. Doesn't apply to Email actions. Include the *.xlsx extension when specifying the parameter value. Enclose the parameter and value in double quotes if you use any spaces within that string of text, such as spaces in file name.
/LogFolderPath=	Used to specify a custom location***** for the processing log file. Can be used in conjunction with the /LogFileName parameter.	No. If not specified, the log file will be written to the default location of the Log\View Action folder in the Stratum.Viewer application folder. Enclose the parameter and value in double quotes if you use any spaces within that string of text, such as spaces in folder name.
/LogFileName=	Used to specify a custom name for the processing log file. Can be used in conjunction with the /LogFolderPath parameter.	No. If not specified, the log file will be assigned an automatically-generated, unique file name that includes the action ID. If used, include the *.txt file extension when specifying the parameter value. Enclose the parameter and value in double quotes if you use any spaces within that string of text, such as spaces in file name.
/ViewActionFolderPath=	Used to specify a custom location***** for the temporary file that is created during action processing. The file is deleted automatically once an action is done being processed.	No. If not specified, the temporary file will be written to the default location of the Data\View Action folder in the Stratum.Viewer application folder. Enclose the parameter and value in double quotes if you use any spaces within that string of text, such as spaces in folder name.

***Note:** See information in the next two sections about setting up the file share or any custom log and view action folders in advance.

File Share Folder

The folder to which a shared file will be written must exist prior to the execution of the action. Make sure you choose a folder location to which the intended recipients of the action files have read access. In addition, the Action Processing Account must have read/write access to the specified folder location.

If the folder is located on the same server as Stratum.Viewer, use the absolute path when referring to it in the action task's parameter values. If the folder is on a different server, use the full UNC path.

Custom Folders

If you plan on using *custom* folders for the processing log files or the view action temporary files, they too must exist prior to the execution of the action. Make sure the Action Processing Account has read/write access to the folders. Default log and temporary file folders are already provided in the Stratum.Viewer application folder and, as noted in the provided parameters table, those folders will be used unless you use the /LogFolderPath and /ViewActionFolderPath parameters.

Example Parameter Combinations

Here are a few examples of parameter combinations and what they represent. Notice that:

- Spaces were **not** used before or after any of the parameter's equal signs.
- Spaces **were** used in between the parameters of the last two examples because multiple parameters exist in those examples.
- Double quotes **were** used around the /FileShareFile and /LogFolderPath parameters/values because of the spaces in the parameter values.

Example	Description
/ViewActionId=345	Processes action ID 345.
/ViewActionId=347 "/FileShareFile=D:\Sales File Shares\action 347 YTD Info.xlsx"	Processes the File Share action ID 347, resulting in an MS Excel file named action 347 YTD Info.xlsx. The file is written to the Sales File Shares folder in the Stratum.Viewer server D drive.
/ViewActionId=347 "/LogFolderPath=D:\Sales File Shares\Log\" "/FileShareFile=D:\Sales File Shares\action 347 YTD Info.xlsx"	Results in the same output as the previous example but the log file will be written to the Sales File Shares\Log folder in the Stratum.Viewer server D drive. The log file name will be automatically generated by Stratum.Viewer.

Frequently Asked Questions (FAQ's)

Can Action ID's be Passed into Stratum.Viewer via URL's?

Yes. You can set up a URL that defines which view and corresponding action to run. The properties defined for the action, such as the action parameters values, will influence what data shows up when the view opens in the browser. Here is an example URL that will run action 12 for view 100 of the Stratum.Viewer instance server-xyz:60500. The text Default.aspx will cause the top frame and left panel to display in the browser along with the view.

http://server-xyz:60500/Default.aspx?ViewId=100&ActionId=12

You could hide the top frame and left panel by switching the Default.aspx text for ViewWindow.aspx as follows:

http://server-xyz:60500/ViewWindow.aspx?ViewId=100&ActionId=12

Additional types of syntax are available to control aspects of the grid display, including the display of the toolbar, name of the view and image above the grid, View Filter section, and view explorer. That syntax is summarized in the table at the end of this topic.

A few things to know about URL's that include Action ID's:

- When the URL is run, the View Prompt window will be bypassed even if there are parameter groups defined for the view that have their Required property set to Yes. The view will always run with the action parameter value(s) defined for the action specified in the URL. Also, the View Prompt window will be bypassed even if the view has its Presentation Prompt property set to Yes. The view will run using the presentation Type defined for the view, either Viewer or Excel.
- Syntax for passing view parameters into the view cannot be used in a URL that uses and Action ID. You can either use the Action ID or the parameters syntax (member, user list, drop-down, etc) in a URL but not both.

Syntax to Show or Hide Parts of the View Interface

Item	Format & Values
Top frame and left panel	To hide them, use ViewWindow.aspx in the query string To show them, use Default.aspx in the query string
Grid toolbar	To hide it, use IsHideToolbar=True To display it, either exclude this syntax from the URL all together or use IsHideToolbar=False
View name above grid	To hide it, use IsHideViewName=True To display it, either exclude this syntax from the URL all together or use IsHideViewName=False
View image above grid	To hide it, use IsHideViewImage=True To display it, either exclude this syntax from the URL all together or use IsHideViewImage=False
View Filter section	To hide it, use IsHideViewFilter=True To display it, either exclude this syntax from the URL all together or use IsHideViewFilter=False
View explorer	To hide it, use IsHideExplorer=True To display it, either exclude this syntax from the URL all together or use IsHideExplorer=False

Can Global Actions be Defined for Any Type of View?

Yes. Global actions can be defined for global, personal, or shared views.

Can Personal Actions be Defined for Any Type of View?

Yes. Personal actions can be defined for global, personal, or shared views.

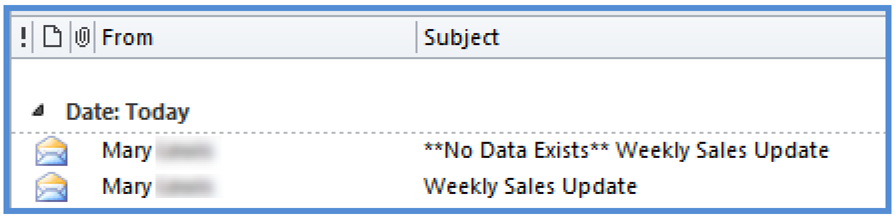
What Does “No Data Exists” Mean?

A “No Data Exists” action case means that there are no rows or columns of data in the view results for a selected recipient of the action. When there are no rows or columns, then no file share can be generated for File Share actions and no view included as text or attached as an Excel file can be created for Email actions. A filter on the view or the role of a user for whom the action was processed can cause a “No Data Exists” case to occur.

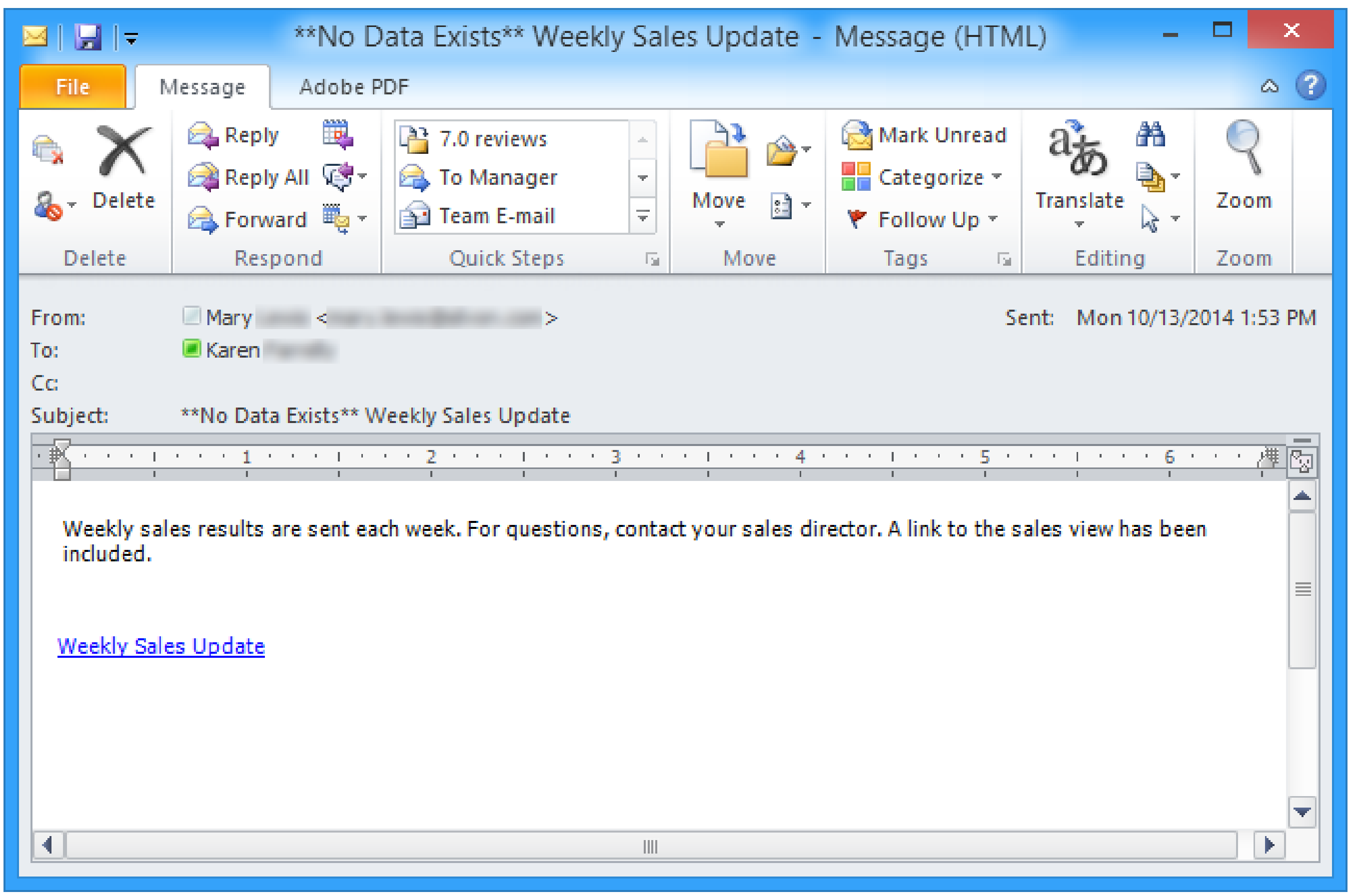
- For example, there are no rows and columns returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than $40,000.
- Or, a user’s role does not permit them to see any data for any of the levels in the view.

Example

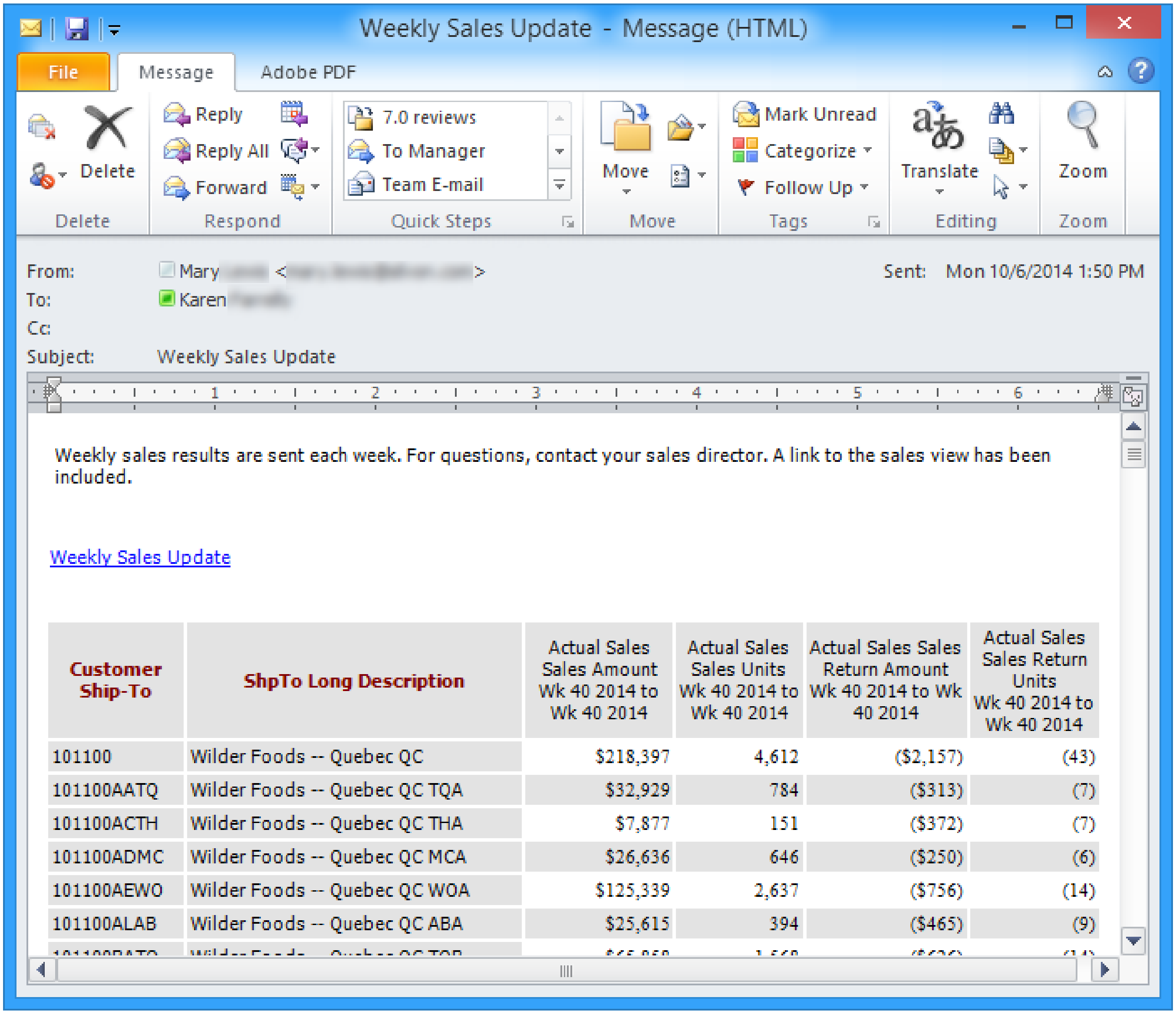
In the following example, the action that created the Weekly Sales Update emails is associated with a view that has filter criteria such that on the first Monday there was data that matched the criteria and on the following Monday there was no data that matched the criteria. An email with view results included in the email was generated the first week (the earlier email). A “No Data Exists” email was generated by the action the second week (the first, most current email below).



Here is the email from the week when no data existed in view results.



Here is the email from the week when data existed.



From: Mary
To: Karen
Cc:
Subject: Weekly Sales Update
Sent: Mon 10/6/2014 1:50 PM

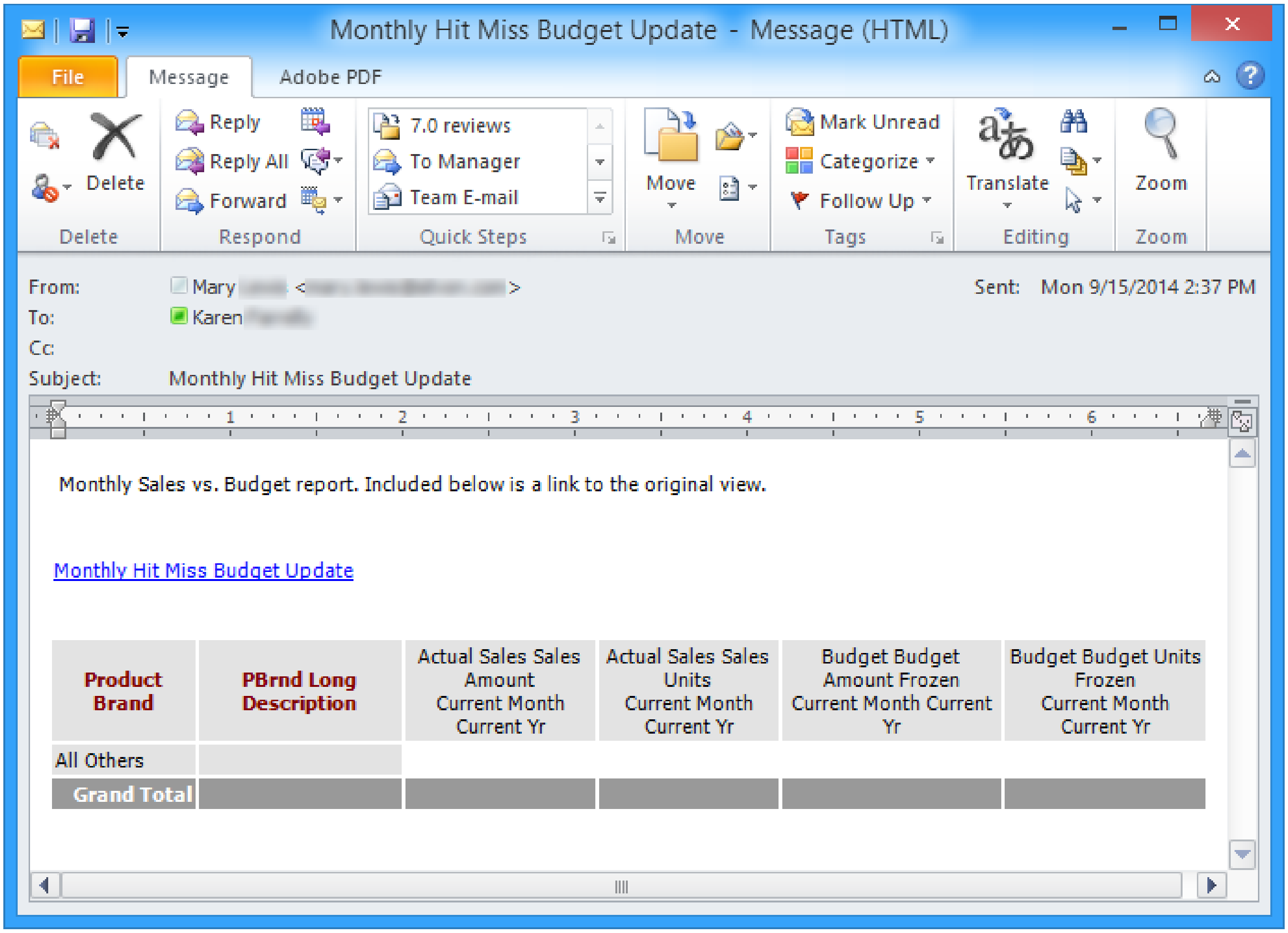
Weekly sales results are sent each week. For questions, contact your sales director. A link to the sales view has been included.

Weekly Sales Update

Customer Ship-To	ShpTo Long Description	Actual Sales Sales Amount Wk 40 2014 to Wk 40 2014	Actual Sales Sales Units Wk 40 2014 to Wk 40 2014	Actual Sales Sales Return Amount Wk 40 2014 to Wk 40 2014	Actual Sales Sales Return Units Wk 40 2014 to Wk 40 2014
101100	Wilder Foods -- Quebec QC	$218,397	4,612	($2,157)	(43)
101100AATQ	Wilder Foods -- Quebec QC TQA	$32,929	784	($313)	(7)
101100ACTH	Wilder Foods -- Quebec QC THA	$7,877	151	($372)	(7)
101100ADMC	Wilder Foods -- Quebec QC MCA	$26,636	646	($250)	(6)
101100AEWO	Wilder Foods -- Quebec QC WOA	$125,339	2,637	($756)	(14)
101100ALAB	Wilder Foods -- Quebec QC ABA	$25,615	394	($465)	(9)

Additional Information

Results that contain all blank rows and columns will not be considered a “No Data Exists” case. For, example, the following results do not have any rows or columns except for a blank All Others rows. This occurred because the user’s role filtered out all Product Brand rows. The view has at least one row due to the All Other rows; therefore, action results were generated for the user.



What Happens to Actions when Views are Deleted?

When a view is deleted, any actions defined for it also will be deleted.

Why can't I Add an Action?

Actions can’t be added in the following cases:

- You are a casual user.
- You are building a new view and haven’t saved the view. Save the view and then you can add actions.
- You made changes to the parameters or parameter groups for a view and haven’t saved the changes. Save the view and then you can add actions.

Why can't I Edit an Action?

Actions can't be edited in the following cases:

- You are an advanced user and the action is an existing global action.
- You made changes to the parameters or parameter groups for a view and haven't saved the changes. Save the view and then you can edit actions.

Why Didn't a User Receive an Action Email?

Some reasons why a user would not receive an email from an Email or File Share action:

- The action was a File Share action for which the Email Notification property was set to No.
- The user for whom the action was processed has a disabled user profile status in Stratum.Viewer.
- The processed action resulted in a "no data exists" case and the Send Email when no Data Exists property for the action was set to No. See also What Does "No Data Exists" Mean?.
- The user's email client may have treated the email as spam and routed the email to a junk or spam email folder. Emails can be treated as spam for a variety of reasons depending on your mail client, such as because something was considered unsafe in the subject line or body text or because the sender was not considered a safe sender by the client.

Why do Action Results Differ from the Original View

Your role and action parameters can create cases where the view results from an action differ from the original view. For example:

- The person who set up the action may have a role that permits full access to all data in the view. The person who the action was processed for may have a role that limits them to only certain members in the view. That user will not see all the data that exists in the original view.
- A view exists with a drop-down parameter on a Sales Director level that has a default value associated with the parameter – Sales Director 881. The person who sets up the action selects a difference value when choosing a value for the action's drop-down parameter – Sales Director 231. The action results will run filtered by that 231 value while the original view runs filtered by the 881 value. See also Using Parameters to Control Action Results.

Differences also may exist between the view results seen when clicking a view hyperlink included in an action email compared to the results seen when opening the file share for a File Share action, opening the Excel attachment for an Email action, or looking at the view included as text in the email of an Email action. The view results from an action output will be different from the view results from running the view from an included hyperlink if the following conditions occur after you have processed the action:

- The associated view was modified.
- The action parameter values for the action definition were modified.
- The underlying Stratum.Server data source was updated.
- The user's role was modified.

Why Wasn't a File Share Generated?

Some reasons why a shared file would not be generated when a File Share action is processed:

- The processed action resulted in a "no data exists" case such that the view results did not contain any data. A shared file will only be created if the view results contain data. If the view results do not contain any data, then a shared file will not be created. See also What Does "No Data Exists" Mean?.
- The parameters specified while scheduling the action to be processed may be incorrect or incomplete. For example, you may have specified an incorrect or invalid Action ID, you may have used spaces in a specified file share folder and forgotten to enclose the /FileShareFile parameter/value in double quotes, or you may have used a space before or after the equal sign in the /ViewActionId parameter. Another possibility is that you specified a file share folder that the Action Processing Account does not have read/write access to and therefore the file could not be written to the specified folder. See also Scheduled Actions Overview, Parameters, and Examples.

Definitions

Action Administrator

The Action Administrator is the person(s) that your company has designated as being responsible for scheduling actions to be run. See also Scheduled Actions Overview, Parameters, and Examples.

Note: The Action Administrator doesn't need to have a Stratum.Viewer user profile.

Action Processing Account

The Action Processing Account is the User Account that is specified for executing scheduled actions. Emails generated by scheduled actions will be from the Action Processing Account. See also Scheduled Actions Overview, Parameters, and Examples.

Global, Personal, and Shared Objects

Several types of objects in this application can be set up with either global, personal, or shared designations. Views fall into that category. Also, user lists, user links, actions, and conditional formats can be either global or personal but not shared. This designation is a means of controlling which users can use the objects and save edits to the objects. View and security administrators can change the owner of any view, user list, conditional format, or action.

- **Global Objects -** can be used by all users. Administrators can create global objects. For example, an administrator creates a global view and enables it for the view groups of other users. Those users will be able to see the global view in their left panel and run the view. They cannot change the global view definition. If they make edits to the global view and want to save them, they can perform a Save As to create a shared or personal copy of the view.
- **Personal Objects -** can be used by all users but only edited by object owners. For example, a user with an advanced level of access in the application can filter a view using another user's personal user list but cannot maintain that user list.
- **Shared Views** – can be created or used by any type of user. Anyone with access to the view group to which the view belongs will see the shared view in their left panel. A shared view is a collaborative view for use within a group or department, but does not need to be managed by a Viewer administrator.