

Working with Conditional Formats

Stratum.Viewer 6



Getting Started

- [Access to Conditional Formats](#)
- [Accessing Conditional Format Functionality](#)
- [Introduction to Conditional Formats](#)
- [Quick Start – Define a Conditional Format](#)
- [Quick Start – Use a Custom Conditional Format](#)

Tasks

Using

- [Assign Pre-Defined Conditional Formats to Measure Items](#)
- [Assign Custom Conditional Formats to Measure Items](#)
- [Remove Conditional Format from Measure Item](#)
- [Select a Different Conditional Format for a Measure Item](#)

Editing

- [Create a Conditional Format](#)
- [Delete a Conditional Format](#)
- [Edit a Conditional Format](#)

Additional Information

- [Example Views with Conditional Formatting](#)

Windows

- [Conditional Format List Window](#)
- [Conditional Format Maintenance Window](#)
- [Custom Conditional Format Window](#)
- [Display Options Window for Conditional Format List Window](#)
- [Grid Pop-up Menus](#)
- [Left Panel](#)
- [Properties Window for Individual Measure Items](#)
- [Save Conditional Format As Window](#)
- [Save Custom Conditional Format As Window](#)
- [Select Conditional Format Window](#)
- [Select Format Window](#)
- [Select Icon Window](#)
- [Select Icon Set Window](#)
- [Select User Window](#)

Advanced Concepts

- [Add Custom Icons for Conditional Formatting](#)
- [Change the Conditional Format's Display Options](#)
- [Change the Owner of a Conditional Format](#)
- [Use Pre-fill Icons](#)
- [Save a Custom Conditional Format](#)

FAQ's

- [Can Global Conditional Formats be Assigned to Any Type of View?](#)

- [Can Personal Conditional Formats be Assigned to Any Type of View?](#)
- [Why can't I Add a Conditional Format?](#)
- [Why Do Blank Boxes Show in Views or Conditional Format Windows?](#)
- [Why Do Red X's Show in Views or Conditional Format Windows?](#)

Definitions

- [Global, Personal, and Shared Objects](#)
- [Custom Conditional Format vs. Conditional Format](#)

Getting Started

Access to Conditional Formats

Your user profile level controls what you can do with conditional formats.

User Profile Level	Personal Conditional Formats*				Global Conditional Formats			
	Create	Edit	Delete	Use	Create	Edit	Delete	Use
Casual								x
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

* View and security administrators also can edit and delete other user's conditional formats.

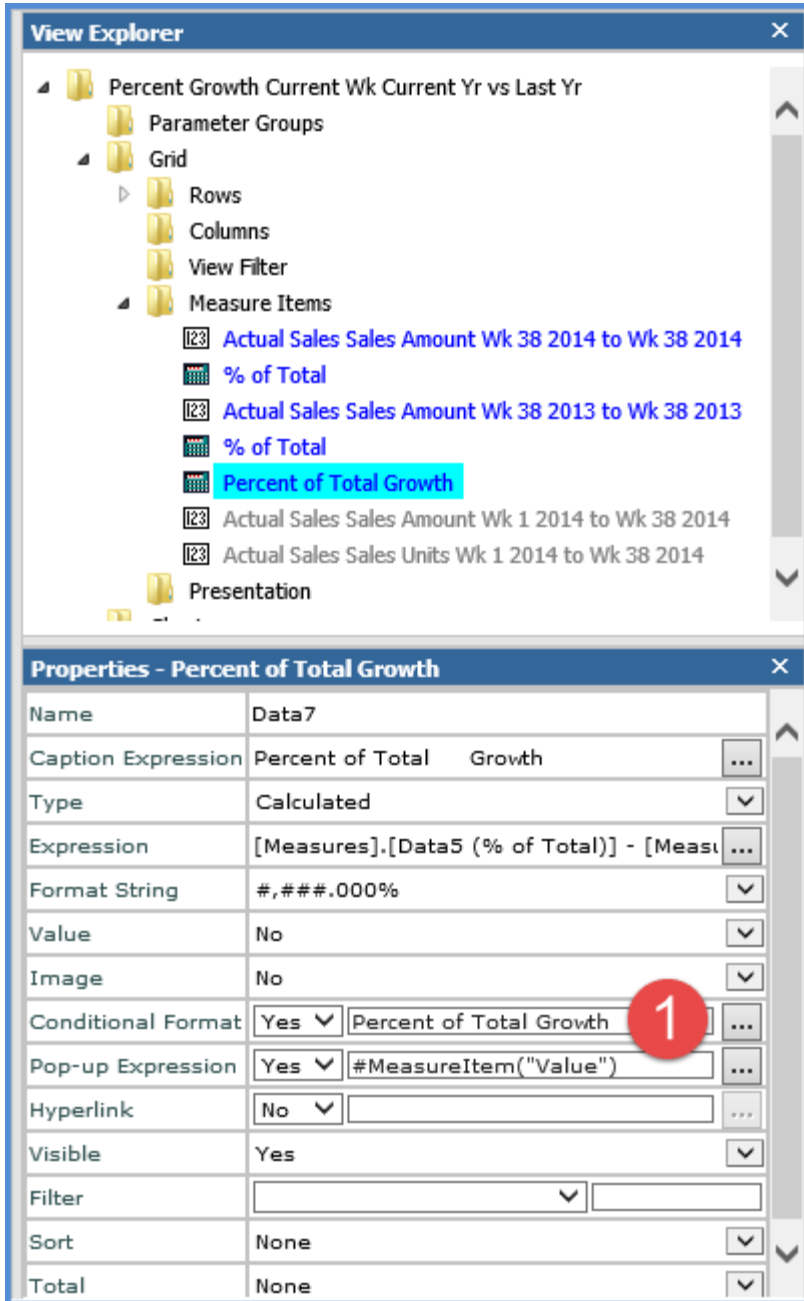
Accessing Conditional Format Functionality



You can access conditional format functionality from the Conditional Format option on the measure item context menu. Right-click on the measure item caption and choose Conditional Format.

Product	Actual Sales Sales Amount Wk 38 2014 to Wk 38 2014	% of Total	Actual Sales Sales Amount Wk 38 2013 to Wk 38 2013	% of Total	Percent of Total Growth
Frozen	\$747,609	8.48%	\$820,193	8.53%	↓
Meatlo	\$732,666	8.31%	\$793,624	8.26%	↑
Frozen	\$672,848	7.64%	\$738,174	7.68%	↓
Meatlo	\$659,400	7.48%	\$714,262	7.43%	↑
Frozen	\$635,467	7.21%	\$697,164	7.25%	↓
Meatlo	\$622,766	7.07%	\$674,581	7.02%	↑
Frozen	\$598,087	6.79%	\$656,155	6.83%	↓
Meatlo	\$586,133	6.65%	\$634,899	6.61%	↑
Frozen	\$570,707	6.36%	\$615,145	6.40%	↓
Meatlo	\$559,218	6.24%	\$595,218	6.19%	↑
Frozen	\$538,000	5.94%	\$574,135	5.97%	↓
Meatlo	\$526,000	5.82%	\$555,537	5.78%	↑
Frozen	\$511,000	5.51%	\$533,126	5.55%	↓
Meatlo	\$476,233	5.40%	\$515,856	5.37%	↑
Frozen Lasagna Dinner 4D	\$448,565	5.09%	\$492,116	5.12%	↓
Grand Total	\$8,812,118	100.00%	\$9,610,185	100.00%	

1	Edit – Use to edit the conditional format associated with the selected measure item. The Select Conditional Format window will display.
2	Remove / Remove All – Click Remove to remove the conditional format associated with the selected measure item. Click Remove All to remove all conditional formats from the view. Note: The conditional formats will not be deleted. They will only be removed from the measure item definition(s) in this view.

You can also access conditional format functionality from measure item Properties windows:



1 **Conditional Format** – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. If Yes, the browse button  accesses the Select Conditional Format window where you select the conditional format associated with the measure item. The name of the selected conditional format displays in the text box left of the  icon. In this example, the Percent of Total Growth conditional format is used.

Introduction to Conditional Formats

Conditional Formatting provides the ability to visually represent and highlight data in the grid using indicators that are based on a predefined set of criteria. For example, conditional formatting icons can be used as traffic lights that grab the user's attention and quickly convey a status that is based on underlying detailed data within Stratum.Viewer. Icons also help the user visualize answers to the following types of questions:

- What are we ahead or behind on?
- What goals have been reached? Which have not?
- Are we improving or getting worse?

Conditional Format Examples

The following are examples of views with conditional formatting.

The view below has a conditional format applied to the measure item "Gross Margin Amount." It is defined to display a green up arrow when the margin is greater than \$10,000. A yellow horizontal arrow displays if margin is between \$5,000 and \$10,000. A red down arrow displays if margin is below \$5,000. This measure item also has been defined with a pop-up label that displays the Gross Margin Amount value as well as the criteria associated with the conditional format.

View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	↓
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	↓
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	↔
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	↔
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	↓
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	↓
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	↔
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	↓
Mand Orq Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$15,484	↓
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$18,474	↓
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$24,418	↓
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$35,565	↓
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	↑
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	↓
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	↔
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	↑
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	↓
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	↓
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	↑
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	↑

Gross Margin is \$16,649. Green arrows indicate margins above \$10,000. Yellow arrows indicate margins between \$5,000 and \$10,000. Red arrows indicate margins below \$5,000.

The view below has a conditional format applied to the Gross Margin Amount measure item that displays indicator icons. The Gross Margin Amount value displays in addition to the indicator icons.

View Name: <i>Product Sales, Returns, Margins</i>					
View Filter					
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014		Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	↓	\$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	↓	\$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	↔	\$7,732
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	↔	\$5,099
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	↓	\$3,909
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	↓	\$3,785
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	↔	\$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	↓	\$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	↓	\$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	↔	\$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	↔	\$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	↔	\$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	↑	\$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	↓	\$2,444
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	↔	\$7,829
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	↑	\$32,383
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	↓	\$1,289
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	↓	\$1,877
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	↑	\$14,192
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	↑	\$12,439

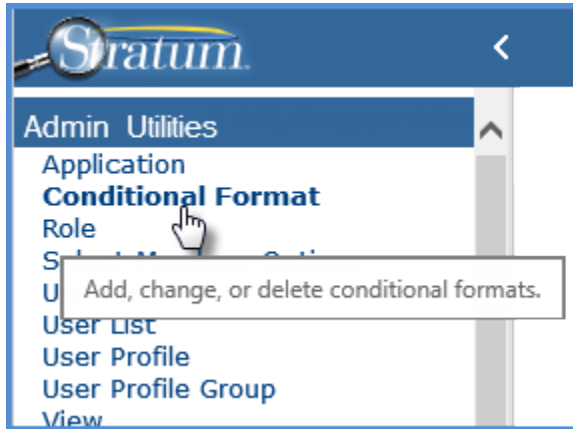
The view below has a conditional format applied to the Gross Margin Amount measure item that uses cell coloring to highlight margins below a desired target of \$5,000.

View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	\$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	\$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	\$7,732
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	\$5,099
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	\$3,909
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	\$3,785
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	\$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	\$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	\$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	\$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	\$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	\$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	\$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	\$2,444
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	\$7,829
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	\$32,383
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	\$1,289
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	\$1,877
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	\$14,192
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	\$12,439

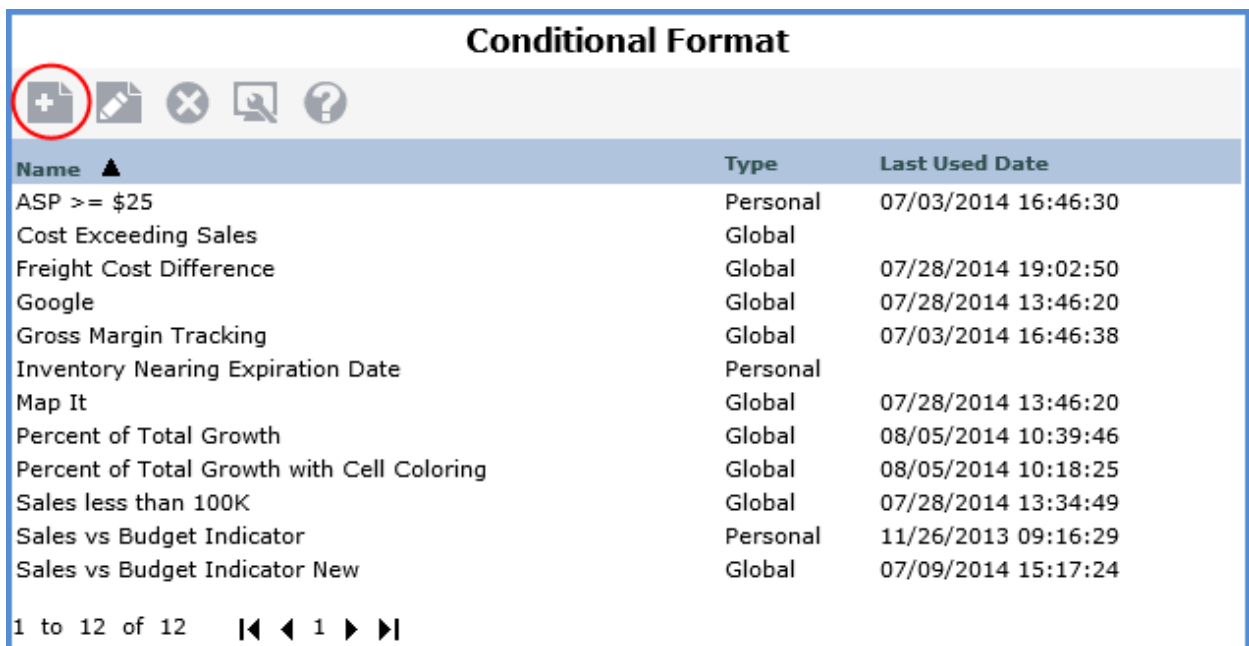
Quick Start – Define a Conditional Format

See a typical path taken to set up a conditional format.

- 1 **Select Conditional Format from the Admin Utilities view group displayed in the left panel.**



- 2 **Click the New button  on the Conditional Format List window and set up the rules for your conditional format.**



A screenshot of the 'Conditional Format' window. The window title is 'Conditional Format'. The top toolbar contains icons for New (circled in red), Edit, Delete, Find, and Help. Below the toolbar is a table with three columns: Name, Type, and Last Used Date. The table lists 12 conditional formats. At the bottom of the window, there is a pagination control showing '1 to 12 of 12' and navigation arrows.

Name ▲	Type	Last Used Date
ASP >= \$25	Personal	07/03/2014 16:46:30
Cost Exceeding Sales	Global	
Freight Cost Difference	Global	07/28/2014 19:02:50
Google	Global	07/28/2014 13:46:20
Gross Margin Tracking	Global	07/03/2014 16:46:38
Inventory Nearing Expiration Date	Personal	
Map It	Global	07/28/2014 13:46:20
Percent of Total Growth	Global	08/05/2014 10:39:46
Percent of Total Growth with Cell Coloring	Global	08/05/2014 10:18:25
Sales less than 100K	Global	07/28/2014 13:34:49
Sales vs Budget Indicator	Personal	11/26/2013 09:16:29
Sales vs Budget Indicator New	Global	07/09/2014 15:17:24

3

- a Specify name for conditional format, specify a description, and identify whether the conditional format will be global or personal.

d Conditional Format Maintenance




General

Name: Percent of Total Growth **a**

Description: Percent of Total Growth

Type: Global

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is <input <="" td="" type="text" value=">="/> <td>0.0001 c</td> <td><input type="button" value="Add"/> <input type="button" value="Remove"/></td>	0.0001 c	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is <input <="" td="" type="text" value=">="/> <td>0</td> <td><input type="button" value="Add"/> <input type="button" value="Remove"/></td>	0	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/> b	for all other values		




- b Select the icon and/or cell and text formatting that will be applied to the measure item's cell based on satisfying the associated rule.

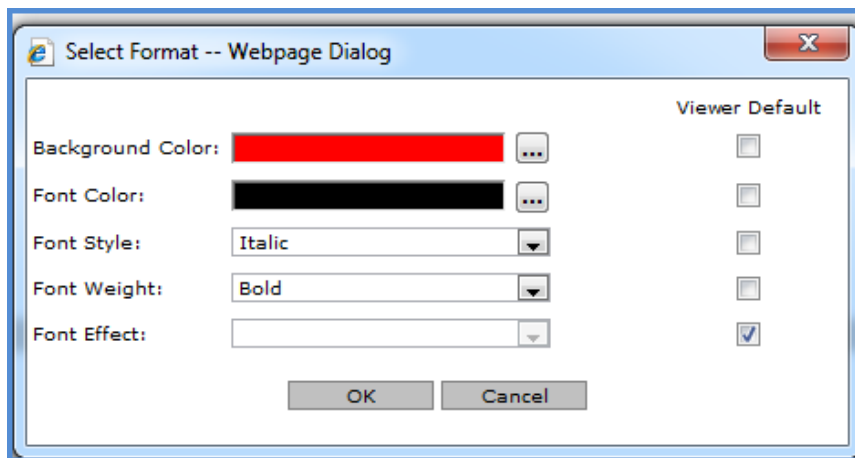
Select Icon -- Webpage Dialog

Icon Sets

- Icons
 - Directional
 - 3 Arrows - Colored
 - 3 Arrows - Gray
 - 5 Arrows - Colored
 - 5 Arrows - Gray
 - Indicators
 - Miscellaneous

Icons

- 
- 
- 



- c** Select an operator from the drop down list and enter a value for the rule.
- d** Save the conditional format.

Quick Start – Use a Custom Conditional Format

While defining a measure item, if there is not an existing conditional format that meets your needs, you can use a custom conditional format. Here is a typical path taken to use a custom conditional format.

1

From the measure item Properties window, access the Select Conditional Format window by changing the Conditional Format field from No to Yes, or by clicking the Browse button when a conditional format is currently assigned.

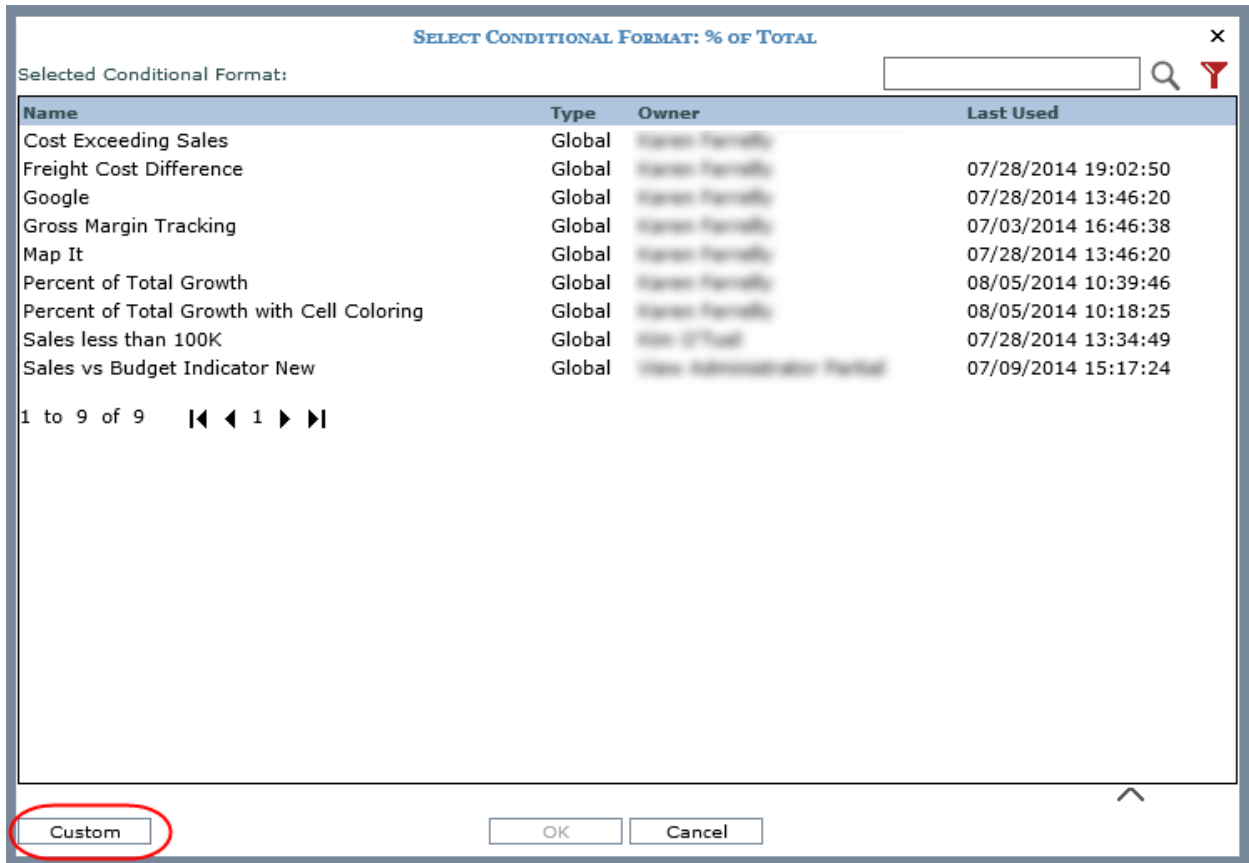
Note: Another option is to right-click the caption for any measure item in the view, and select Conditional Format then Edit.

The screenshot displays a software interface with three main components:

- Data Table:** A table with columns for sales data and percentages. A context menu is open over the table, with 'Conditional Format' selected. A red circle highlights this menu item.
- View Explorer:** A tree view on the right showing the hierarchy of the view, including 'Percent of Total', 'Grid', 'Rows', 'Columns', 'View Filter', 'Measure Items', 'Presentation', and 'Charts'. The 'Measure Items' folder is expanded, showing several items, with one instance of '% of Total' highlighted in blue.
- Properties - % of Total:** A window showing the properties of the selected measure item. The 'Conditional Format' field is set to 'No' and is circled in red. Other fields include Name (Data6), Caption Expression (% of Total), Type (Calculated), Expression (#PercentOfTotal([Measures].[D...]), Format String (#.00%), Value (Yes), Image (No), Pop-up Expression (No), and Hyperlink (No).

2

From the Select Conditional Format window, click the Custom button to access the Custom Conditional Format window.



3

a

Specify name for the custom conditional format, and specify a description.

CUSTOM CONDITIONAL FORMAT: % OF TOTAL

Name: % of Total **a**

Description: Track high and low contributors

Pre-fill Icons

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
●	1234.10	when value is >=	0.01	Add Remove
■	1234.10	for all other values		b

Select Save As OK **c** Cancel

b

Define the rule(s) of the custom conditional format, including any text or cell coloring as well as any icon that will display based on satisfying the associated rule.

c

Click OK to redisplay the view with the custom conditional format applied.

Note: Custom conditional formats are intended to be used only one time and are only associated with a single measure item. They are not available for use in other views or by other users. The Save As functionality is available if you wish to create a conditional format definition from a custom conditional format.

Assign Pre-Defined Conditional Formats to Measure Items

1. In the measure item Properties window, set the Conditional Format field to Yes.
OR
1. Right click on the measure item caption and choose Conditional Format then Edit.
2. From the [Select Conditional Format window](#), choose a conditional format, and the rules of the selected conditional format will display in the right side of the window.
3. Click OK.
4. Apply the changes, and the view will redisplay with the conditional format applied.

Assign Custom Conditional Formats to Measure Items


1. In the measure item Properties window, set the Conditional Format field to Yes.
OR
1. Right click on the measure item caption and choose Conditional Format then Edit.
2. From the [Select Conditional Format window](#), click the Custom button to access the Custom Conditional Format window.
3. Specify name for the custom conditional format, and specify a description.
4. Define the rule(s) of the custom conditional format, including any text or cell coloring as well as any icon(s) that will display based on satisfying the associated rule.
5. Click OK, and the view will redisplay with the custom conditional format applied.

Remove Conditional Formats from Measure Item

1. In the measure item Properties window, change the Conditional Format field from Yes to No.
2. When prompted to Apply Changes, choose Yes. The view will redisplay without the conditional format applied.
OR
1. Right click on the measure item caption and choose Conditional Format then Remove.

Note: The conditional formats will not be deleted. It will only be removed from the measure item definition(s) in this view.

Select a Different Conditional Format for a Measure Item


1. In the measure item Properties window, click the Conditional Format Browse button .
2. From the [Select Conditional Format window](#), choose a different conditional format and click OK.

OR

1. Right click on the measure item caption and choose Conditional Format then Edit.
2. From the [Select Conditional Format window](#), choose a different conditional format and click OK.

Tasks - Editing

Create a Conditional Format

1. Click Conditional Format in the Admin Utilities view group.
2. In the [Conditional Format list window](#), click New  to open the Conditional Format Maintenance window and define the rules.
3. Specify name, description, and whether the conditional format is global. Conditional formats default to Personal for advanced users.
4. Click the Icon button to select the icon to display in the measure item's cell based on satisfying the associated rule. In the example that follows, the green up arrow was selected as part of the first rule.
5. Click the Format button to format the background color and font applied to the measure item cell based on satisfying the associated rule. In the example that follows, a green background and italic font was selected as part of the first rule.
6. Select an operator from the drop down list and enter a numeric value for the rule. In the example that follows, the conditional formatting will be applied when the value is greater than 10000.
7. Continue defining additional rules. In the example that follows, three rules have been defined for the Gross Margin Tracking conditional format.

Conditional Format Maintenance

General

Name:

Description:

Type: Pre-fill Icons

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
	1234.10	when value is >	10000	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10	when value is >	500	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10	for all other values		

8. Save the conditional format.

Delete a Conditional Format

1. Click Conditional Format in the Admin Utilities view group.
2. In the [Conditional Format list window](#), select the desired conditional format and click Delete .

Note: Casual users cannot edit or delete any conditional formats. Advanced users can edit and delete only their own personal conditional formats. View and security administrators can create, edit, delete, and use personal and global conditional formats including editing and deleting other user's conditional formats.

Edit a Conditional Format Action

1. In the [Conditional Format list window](#), select the desired conditional format and click Edit .
- OR**
1. Double click on the conditional format to open the [Conditional Format Maintenance window](#).
 2. Make the necessary edits to the conditional format name, description, and rules. Administrators also can edit the owner of a conditional format using the Owner property. Clicking the Browse button for the property opens a [Select User Window](#) for changing the owner.
 3. Click Save .

Note: Casual users cannot edit or delete any conditional formats. Advanced users can edit and delete only their own personal conditional formats. View and security administrators can create, edit, delete, and use personal and global conditional formats including editing and deleting other user's conditional formats.

Examples

Conditional Format Using Indicator Only

The view below has a conditional format applied to the Gross Margin Amount measure item that displays the indicator only. This measure item also has been defined with a pop-up label that displays the Gross Margin Amount value as well as the criteria associated with the conditional format.

View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	↓
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	↓
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	↘
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	↘
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	↓
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	↓
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	↘
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	↓
Mand Orq Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$15,484	↓
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$18,474	↓
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$24,418	↓
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$35,565	↓
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	↑
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	↓
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	↘
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	↑
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	↓
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	↓
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	↑
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	↑

Gross Margin is \$16,649. Green arrows indicate margins above \$10,000. Yellow arrows indicate margins between \$5,000 and \$10,000. Red arrows indicate margins below \$5,000.

Conditional Format using Indicator and Value

The view below has a conditional format applied to the Gross Margin Amount measure item that displays indicator icons. The Gross Margin Amount value displays in addition to the indicator icons.

View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	↓ \$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	↓ \$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	↔ \$7,732
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	↔ \$5,099
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	↓ \$3,909
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	↓ \$3,785
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	↔ \$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	↓ \$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	↓ \$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	↔ \$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	↔ \$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	↔ \$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	↑ \$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	↓ \$2,444
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	↔ \$7,829
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	↑ \$32,383
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	↓ \$1,289
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	↓ \$1,877
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	↑ \$14,192
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	↑ \$12,439

Conditional Format using Font and Cell Coloring

The view below has a conditional format applied to the Gross Margin Amount measure item that uses font and cell coloring to highlight margins below a desired target of \$5,000.

View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	\$2,787
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	\$1,580
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	\$7,732
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	\$5,099
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	\$3,909
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	\$3,785
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	\$5,304
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	\$4,638
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	\$4,860
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	\$5,534
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	\$6,458
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	\$8,207
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	\$16,649
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	\$2,444
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	\$7,829
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	\$32,383
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	\$1,289
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	\$1,877
FrtCktail LS 12 oz BR* 0A	\$49,061	(\$4,575)	\$34,868	\$14,192
FrtCktail 6oz LnchPk BR* 0A	\$49,986	(\$6,366)	\$37,547	\$12,439

Conditional Format List Window

The Conditional Format list window is accessed from the Admin Utilities group in the left panel of your Stratum.Viewer window. Below is the Conditional Format list window.

1

Conditional Format

Name ▲	Type	Last Used Date
ASP >= \$25	Personal	07/03/2014 16:46:30
Cost Exceeding Sales	Global	
Freight Cost Difference	Global	07/28/2014 19:02:50
Google	Global	07/28/2014 13:46:20
Gross Margin Tracking	Global	08/05/2014 12:57:32
Inventory Nearing Expiration Date	Personal	
Map It	Global	07/28/2014 13:46:20
Percent of Total Growth	Global	08/05/2014 10:39:46
Percent of Total Growth with Cell Coloring	Global	08/05/2014 10:18:25
Sales less than 100K	Global	07/28/2014 13:34:49
Sales vs Budget Indicator	Personal	11/26/2013 09:16:29
Sales vs Budget Indicator New	Global	07/09/2014 15:17:24

1 to 12 of 12

1

1	<p>Toolbar Icons –</p> <ul style="list-style-type: none"> • New – Click to define a new conditional format. • Edit – Click to edit an existing conditional format. • Delete – Click to delete the selected conditional format(s) with confirmation. • Display Options – Click to adjust the information that displays on the Conditional Format list window. • Help – Click to access help that is specific to conditional formats. <p>Paging Controls – Use the paging arrows to move between pages of conditional formats. Controls are active only when there are multiple pages to scroll through.</p>
2	<p>Name – The window lists all conditional formats that the user has access to and allows them to create new ones or edit existing ones. For advanced users, all global and the user’s personal conditional formats are listed here. For View and security administrators, all conditional formats are listed. Double clicking on a name opens the Conditional Format Maintenance window for editing.</p>
3	<p>Type – Whether the conditional format is global or personal displays here. View and security administrators can create and edit global and personal conditional formats as well as edit and delete other user’s conditional formats. Advanced users can create and edit their own personal conditional formats.</p> <p>Last Used Date – The date and time of when the conditional format was last used in a view is displayed here.</p>

Conditional Format Maintenance Window

Conditional Format Maintenance

1

General

Name:

Description: 2

Type: 3

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
↑	1234.10	Icon Format	when value is >= 0.0001	<input type="button" value="Add"/> <input type="button" value="Remove"/>
→	1234.10	Icon Format	when value is >= 0	<input type="button" value="Add"/> <input type="button" value="Remove"/>
↓	1234.10	Icon Format	for all other values	<input type="button" value="Add"/> <input type="button" value="Remove"/>

4
5
6

Attributes

Created Date: 06/20/2011 11:59:38

Owner:


Last Updated Date: 06/20/2011 11:59:38 7

Last Updated By: Karen

Last Used Date: 08/05/2014 10:39:46

Last Used By: Karen

- | | |
|---|---|
| 1 | <p>Toolbar Icons –</p> <ul style="list-style-type: none"> • New – Click to clear the Conditional Format Maintenance window and set up a new conditional format. • Save and Save As – Click the respective buttons to save the active conditional format or create a new format from the active format. The Save button will be disabled in certain cases, such as for advanced users who are viewing properties of a global conditional format. They cannot save changes to global conditional formats, but can use the Save As button to create a new format from that currently displayed format. • Delete – Click to delete the conditional format. You will be prompted to confirm the deletion. • Exit – Click to exit this window and return to the Conditional Format list window. • Help – Click to access help that is specific to conditional formats. |
| 2 | <p>General Properties – Use this section to specify the name and description for the conditional format. The Type property is used to make a conditional format personal or global. View and security administrators can create / maintain global conditional formats. Advanced users, view administrators, and security administrators can create / maintain personal conditional formats. Global conditional formats may be used with any type of view – global, personal, or shared views. Personal conditional formats also can be used with global, personal, or shared views.</p> |

3	<p>Pre-fill Icons – Takes you to the Select Icon Set window where you can select an icon set to pre-fill the rules and icons for the conditional format.</p>
4	<p>Icon – This is the icon that will display in the measure item’s cell based on satisfying the associated rule. Click on the Icon button to open the Select Icon window. The Percent of Total Growth conditional format in this example has 3 rules.</p> <ol style="list-style-type: none"> 1. Display a green up arrow when the measure item value is $\geq .0001$. 2. Display a yellow horizontal arrow when the measure item value is between $.00001$ and 0. 3. Display a red down arrow with yellow cell coloring for all other values. <p>Format – This is the cell and text formatting that will be applied to the measure item cell based on satisfying the associated rule. Click on the Format button to access the Select Format window. The Percent of Total Growth conditional format in this example includes yellow background coloring for the “for all other values” rule.</p>
5	<p>Operator and Value – Select an operator from the drop down list and enter a value for the rule. Available operators are =, < >, <, <=, >, >=. The value must be numeric.</p>
6	<p>Options – You can add or remove rules within the conditional format.</p>
7	<p>Attributes – This section shows the attributes of the conditional format, including when it was last updated and last used. When you create, update, or use a conditional format, this information is automatically updated by Stratum.Viewer.</p> <p>The Owner property in the Attributes section can be used by administrators to change the owner of a conditional format. Administrators can click the Browse button  next to the property and use a Select User window that opens to change the owner.</p>

Custom Conditional Format Window

This window has similar functionality as the [Conditional Format Maintenance window](#).

CUSTOM CONDITIONAL FORMAT: DAILY SALES AMOUNT CURRENT Yr/CURRENT MONTH

Name: 1

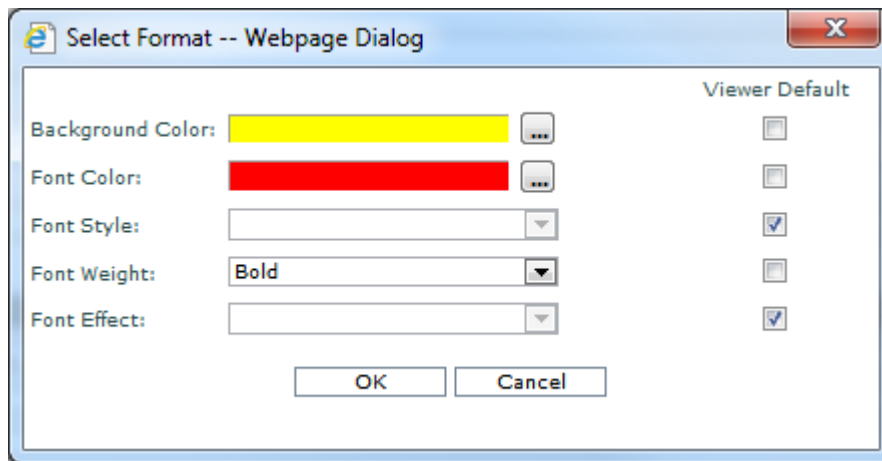
Description: 2

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
☑	1234.10 <input type="button" value="Icon"/> <input type="button" value="Format"/>	when value is	>= <input type="text" value="10000000"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
1234.10	<input type="button" value="Icon"/> <input type="button" value="Format"/>	for all other values		

6

1	<p>Name and Description – Specify the name and description for the custom conditional format. The name will be displayed in the Conditional Format text box left of the Browse button <input type="button" value="..."/> within a measure item Properties window.</p>
2	<p>Pre-fill Icons – Takes you to the Select Icon Set window where you can select an icon set to pre-fill the rules and icons for the custom conditional format.</p>
3	<p>Icon – This is the icon that will display in the measure item’s cell based on satisfying the rule. Click on the Icon button to open the Select Icon window. The YTD Sales custom conditional format in this example has 2 rules.</p> <ol style="list-style-type: none"> 1. Display a blue check when the measure item value is greater than or equal to 10000000. 2. Apply yellow cell coloring and red bolded text for all other values. <p>Format – This is the cell and text formatting that will be applied in the measure item’s cell based on satisfying the rule. Click on the Format button to access the Select Format window. The custom conditional format in this example includes a yellow background with red, bold font for the “for all other values” rule.</p>



4

Operator and Value – Select an operator from the drop down list and enter a value. Available operators are =, < >, <, <=, >, >=. The value must be numeric.

5

Options – You can add or remove rules for the conditional format.

6

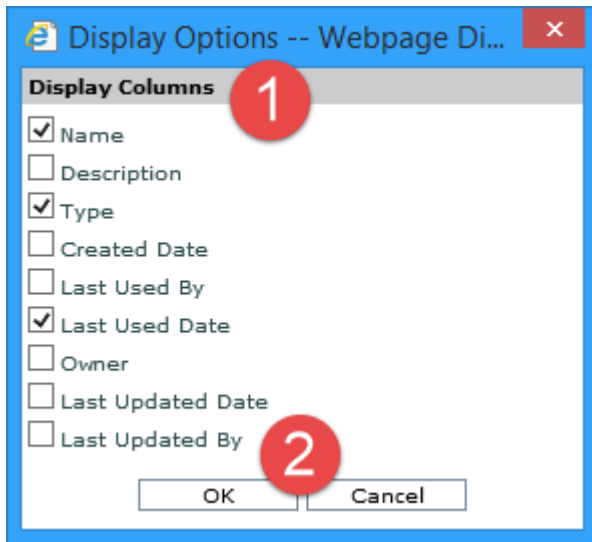
Select or Custom – The Select and Custom buttons switch between the two modes of the window. The Custom Conditional format window has the Select button available so that you can switch to the Select Conditional Format window. Clicking Select will remove the custom conditional format with confirmation. The Select Conditional Format window will display without any conditional format selected.

OK – Click to save any edits made on this window and close the window.

Save As – A custom conditional format can be saved as a conditional format.

Cancel – Closes the window without adding the custom conditional format to the active measure item.

Display Options Window for Conditional Format List Window



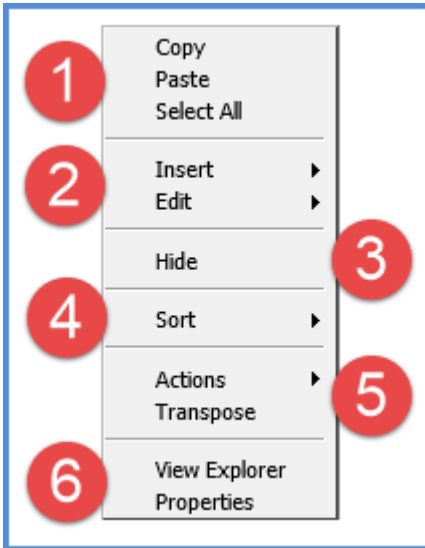
<p>1</p>	<p>Display Columns – Select or deselect columns to control the information that displays on the Conditional Format List window. For example, display the name of the conditional formats, the type of global or personal, and the dates the conditional format was last used. The Created Date, Last Used By, Last Used Date, Owner, Last Updated Date are system information about the conditional format owner and the date and time when the conditional format was last used in a view.</p>
<p>2</p>	<p>OK - Clicking OK applies the changes for the current session only in the Conditional Format List window. If you navigate away from the windows, display columns return to their defaults.</p>

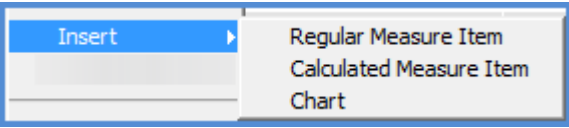
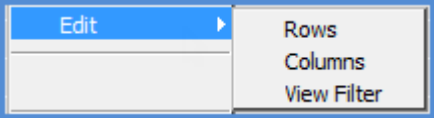
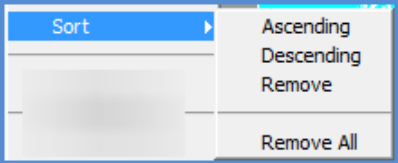
Grid Pop-up Menu

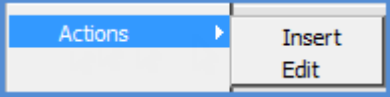
Right-click objects in views to display actions that you can take such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes. 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.

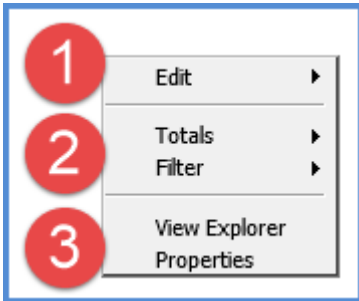


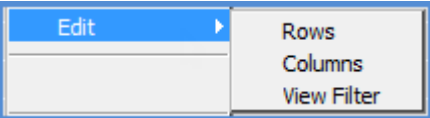
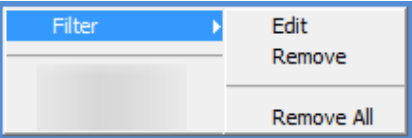
<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Insert - The 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.</p>  <p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>3</p>	<p>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.</p>
<p>4</p>	<p>Sort - Sort options are Ascending, Descending, Remove, and Remove All.</p> 
<p>5</p>	<p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>

	 <p>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.</p>
<p>6</p>	<p>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.</p> <p>Properties - Click to maintain the attribute relationship properties including sorting and whether it is visible or not.</p>

Axis Pop-up Menu

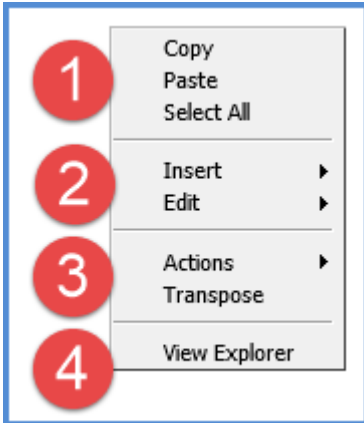
Right-click to display actions that you can take related to that axis, such as controlling the display of totals by axis.

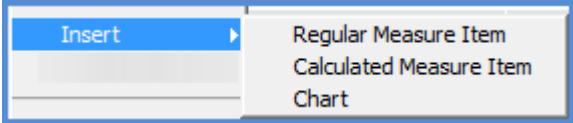
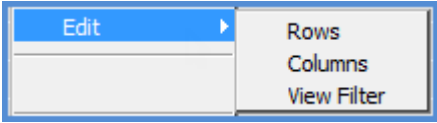
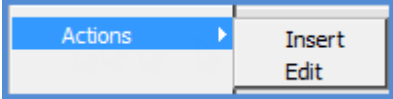


<p>1</p>	<p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>2</p>	<p>Totals - Control whether totals are displayed for all levels on the axis by choosing Yes or No. The Totals Default property in the Properties window for the axis also changes to reflect your choice, as does the Totals property in the Properties window for each level on that axis.</p> <p>Filter - Filter options are Edit, Remove, and Remove All.</p> 
<p>3</p>	<p>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.</p> <p>Properties - Click to maintain the view properties including the name, description, type and view group.</p>

General Pop-up Menu

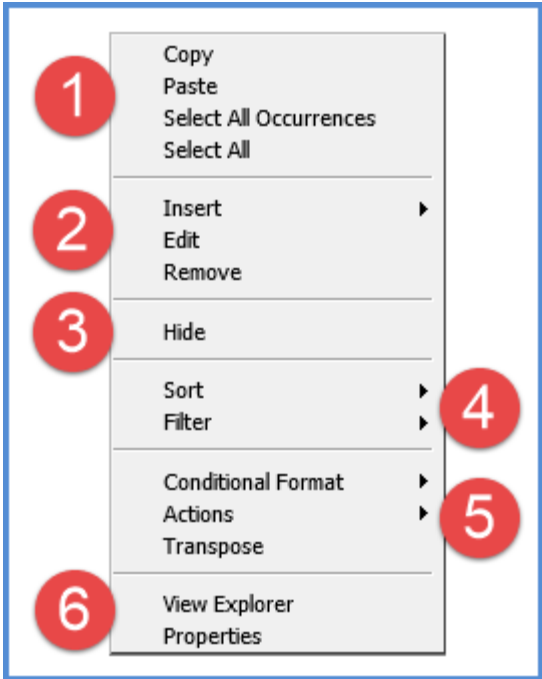
Right-click within the grid to display actions that you can take such as transposing the rows, columns, and measure items.



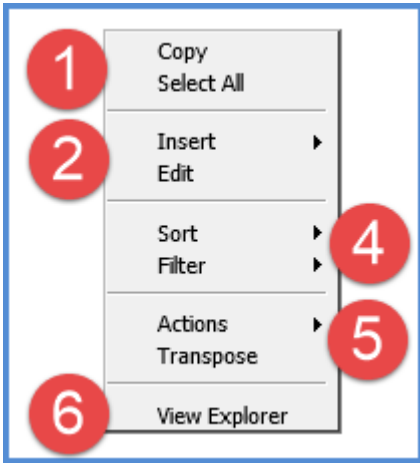
<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Insert - The 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.</p>  <p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>3</p>	<p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>  <p>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.</p>
<p>4</p>	<p>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.</p>

Measure Item Pop-up Menu (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.

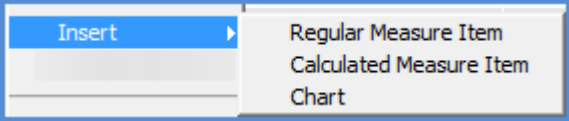
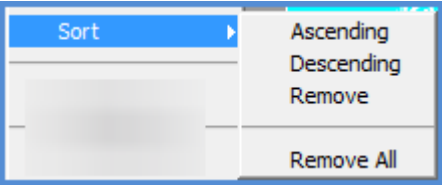
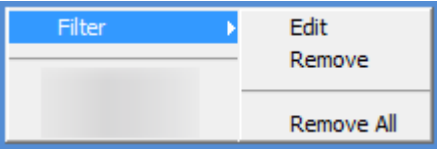
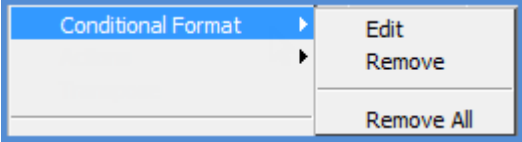
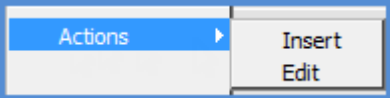


Or, right-click the caption of a measure item in a Grand Total row or column to work with values in that area of a view, such as by applying sorts and filters to them.



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

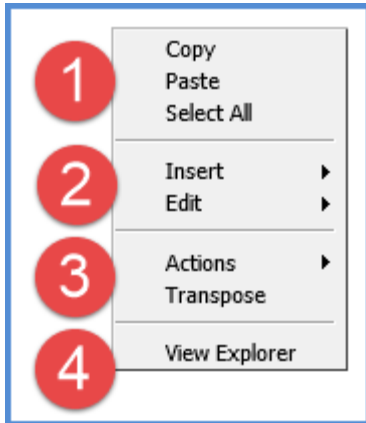
1	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. This option does not display on the menu for Grand Totals.</p> <p>Select All Occurrences - Use this 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.</p> <p>Select All - Use this option to select the entire grid.</p>
2	<p>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</p>

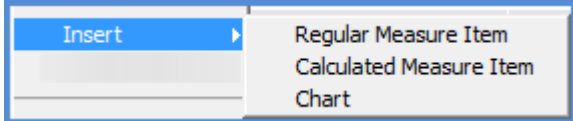
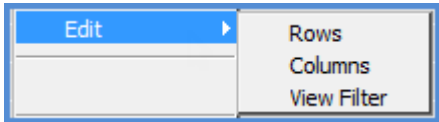
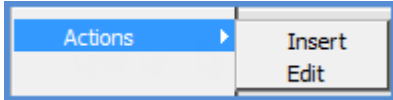
	<p>Data Wizard will display when inserting a new chart.</p>  <p>Edit - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens the Expression window so you can edit the measure item expression.</p> <hr/> <p>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.</p> <hr/> <p>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.</p>
<p>3</p>	<p>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.</p>
<p>4</p>	<p>Sort - Sort options are Ascending, Descending, Remove, and Remove All.</p>  <p>Filter - Filter options are Edit, Remove, and Remove All.</p> 
<p>5</p>	<p>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.</p>  <p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>  <p>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.</p>
<p>6</p>	<p>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.</p> <p>Properties - Click to maintain the measure item properties including the name, caption expression,</p>

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.

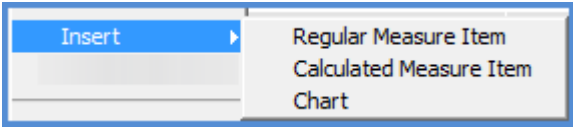
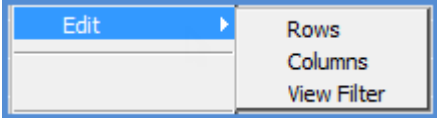
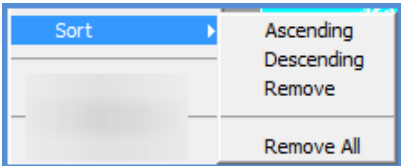


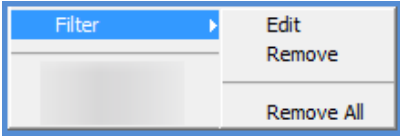
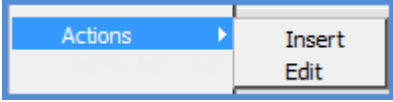
<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Insert - The 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.</p>  <p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>3</p>	<p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>  <p>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.</p>
<p>4</p>	<p>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.</p>

Levels Pop-up Menu

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

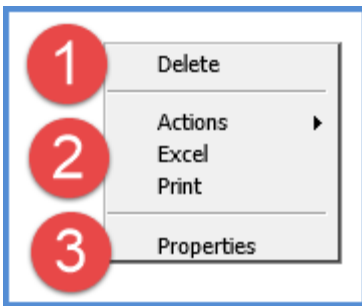


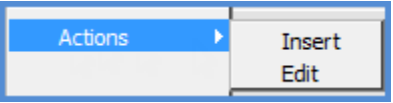
<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Insert - The 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.</p>  <p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>3</p>	<p>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.</p>
<p>4</p>	<p>Sort - Sort options are Ascending, Descending, Remove, and Remove All.</p>  <p>Filter - Filter options are Edit, Remove, and Remove All.</p>

	
5	<p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>  <p>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.</p>
6	<p>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.</p> <p>Properties - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text.</p>

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	<p>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.</p>
2	<p>Actions – Use this option to insert new actions or to edit, process, or delete existing actions.</p>  <p>Excel - Click to initiate an export of the view to Microsoft Excel.</p> <p>Print - Click to print the active page of the view.</p>
3	<p>Properties - Click to maintain the view properties including the name, description, type and view group.</p>

Left Panel



<p>1</p>	<p>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.</p> <p>The order of groups varies by user depending on settings for their user profile group.</p> <p>Contents of the Admin Utilities group vary depending on your level of access to the application.</p> <ul style="list-style-type: none"> • 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.
<p>2</p>	<p>View groups contain the views and user links that you can use in the application.</p> <ul style="list-style-type: none"> • 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): <ul style="list-style-type: none"> • = 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. <ul style="list-style-type: none"> • 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.

New View

- 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.

Run
New
Edit
Delete









Actions ▶
Web Part

Properties Windows for Individual Measure Items

Regular Measure Items

Properties - Actual Sales Sales Amount Wk 1 2012 to Wk 37 2012	
1 Name	Data1
Caption Expression	[Measure] [From Period Short Desc] [From Year ' ...
2 Type	Regular
Measure	Actual Sales Sales Amount
Format String	As Is 3
4 Value	Yes
Image	No
Conditional Format	No 5 Sales Above Goal
6 Pop-up Expression	Yes "Indicator displays for sales over \$5 mi
Hyperlink	No
Visible	Yes
7 Filter	Recursive Top Count 15
Sort	Descend
8 Total	Total

1	<p>Name – The text in this field determines the unique name that Stratum.Viewer will use to identify a measure item in the view. You can edit this field as needed. Default names given to new measure items are DataN. The “N” is a sequential number assigned by Stratum.Viewer to create a unique name. You will be prompted to make corrections to the name if you enter a duplicate name, use any spaces in the name, use too many characters (more than 50), or use invalid characters.</p> <p>Caption Expression - A read only field that shows the expression behind the caption for a measure item. The resolved text generated by the expression creates the caption, which is the text that displays for the measure item in the view and other areas of the application such as view explorer. The Caption Expression window can be accessed for editing the expression by clicking the Browse button next to the field.</p>
2	<p>Type – This property shows the type of measure item you are working with – either regular, calculated, or distinct calculated. The property will be set to “Regular” if you are inserting or editing a regular measure item.</p>

	<p>Note: See the next table for information about calculated and distinct calculated types.</p> <p>Measure – This field is a read only field that displays the underlying measure you selected when setting up the regular measure item.</p> <ul style="list-style-type: none"> For measure items with time ranges, clicking the Browse button  next to the Measure field opens the Edit Measure Item window. Use that window to edit the measure item's underlying measure or time range. The main Time Range property for a view must be set to Yes for the Properties window to behave in this manner. For measure items without time ranges, clicking the search button  next to the Measure field opens the Select Measure window for editing the underlying measure. The main Time Range property for a view must be set to No for the Properties window to behave in this manner.
3	<p>Format String – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting.</p>
4	<p>Value – Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item.</p> <p>Image – This property is used when setting up calculated measure items that display images. See the next table for information about this property.</p>
5	<p>Conditional Format – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. The Browse button  is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create a new one. The name of the selected conditional format displays in the text box left of the  icon.</p>
6	<p>Pop-up Expression – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse button  is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or create a new one. The active pop-up expression displays in the text box left of the  icon.</p> <p>Hyperlink – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse button  is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the  icon.</p>
7	<p>Filter and Sort – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied.</p> <p>If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.</p>
8	<p>Total – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total.</p> <ul style="list-style-type: none"> None – No total will be displayed. Total – This designation takes into account any underlying calculations for a measure item's

definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value.

- **Sum** – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any of the underlying calculations that Viewer performs to be used when generating total values. You might choose to use a Sum total when a measure item calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.

Calculated and Distinct Calculated Measure Items

Properties - Percent of Total Growth	
1	Name: Data7
2	Caption Expression: Percent of Total Growth
3	Type: Calculated
4	Expression: [Measures].[Data5 (% of Total)] - [Measures]
5	Format String: #,###.000%
6	Value: No
7	Image: No
8	Conditional Format: Yes Percent of Total Growth
	Pop-up Expression: Yes #MeasureItem("Value")
	Hyperlink: No
	Visible: Yes
	Filter: []
	Sort: None
	Total: Total


1 Name – The text in this field determines the unique name that Stratum.Viewer will use to identify a measure item in the view. You can edit this field as needed. Default names given to new measure items are DataN. The “N” is a sequential number assigned by Stratum.Viewer to create a unique name. You will be prompted to make corrections to the name if you enter a duplicate name, use any spaces in the name, use too many characters (more than 50), or use invalid characters.







Caption Expression – A read only field that shows the expression behind the caption for a measure item. The resolved text generated by the expression creates the caption, which is the text that displays for the measure item in the view and other areas of the application such as view explorer. The Caption Expression window can be accessed for editing the expression by clicking the Browse button next to the field.

2 Type – This property shows the type of measure item you are working with – either regular, calculated, or distinct calculated. The property will be set to “Calculated” or “Distinct Calculated” if you are inserting or editing that type of measure item.

Note: See the previous table for information about regular types.

Expression – When "Calculated" or "Distinct Calculated" is the measure item type, an Expression field shows in this window. It's a read only field that shows the expression for calculating the measure item.

The Expression window can be accessed for editing the expression by clicking the Browse button 

	<p>next to the field.</p> <p>Note that when you are using a calculated measure item to display images in a view that the expression will determine the location/name of the image file for Stratum.Viewer to display.</p> <ul style="list-style-type: none"> • The image file must reside in the Stratum.Viewer application folders. It is recommended that all custom images reside in a subfolder of the Images folder of the Stratum.Viewer application. • Supported file types for images are *.jpg, *.jpeg, *.png, *.bmp, *.gif, *.tif, and *.tiff. • The image will display according to its original, default size.
3	<p>Format String – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting.</p>
4	<p>Value – Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item.</p> <p>Image – This property is used when setting up calculated measure items that display images. You use the Expression window to define the location of the image and then set this property to Yes in order for the defined image to display in the grid. See item 2 above.</p>
5	<p>Conditional Format – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. The Browse button  is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create a new one. The name of the selected conditional format displays in the text box left of the  icon.</p>
6	<p>Pop-up Expression – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse button  is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or create a new one. The active pop-up expression displays in the text box left of the  icon.</p> <p>Hyperlink – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse button  is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the  icon.</p>
7	<p>Filter and Sort – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied.</p> <p>If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.</p>
8	<p>Total – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total.</p> <ul style="list-style-type: none"> • None – No total will be displayed. • Total – This designation takes into account any underlying calculations for a measure item's definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value. • Sum – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any

of the underlying calculations that Viewer performs to be used when generating total values. You might choose to use a Sum total when a measure item calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.

Save Conditional Format As Window

1	Name and Description – Specify the name and description for the conditional format.
2	Type – Controls whether the conditional format will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
3	Save – Click to save the conditional format and close the window. Cancel – Click to close the window without saving a conditional format.

Save Custom Conditional Format As Window

1	Name and Description – Specify the name and description for the conditional format. The Save Custom Conditional Format As window provides the ability to create a new conditional format that can be used in other views from a custom conditional format. This will no longer be a custom conditional format created on-the-fly, but saved as a regular conditional format. The name and description will default from the custom conditional format.
2	Type – Controls whether the conditional format will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
3	Save – Click to save the conditional format and close the window. Cancel – Click to close the window without saving a conditional format.

Select Conditional Format Window

Main Window Sections

Selected Conditional Format: Gross Margin Tracking

Name	Type	Owner	Last Used
Freight Cost Difference	Global	Mary Lancaster	05/16/2014 14:16:25
Greater than 1000	Global	Valeria Ardell	05/13/2014 11:37:33
Greater than 500	Global	Valeria Ardell	05/09/2014 13:11:24
Greater than 5000	Global	Allen Pravan	05/09/2014 16:03:41
Gross Margin Tracking	Global	Mary Lancaster	06/27/2014 00:42:38
Map It	Global	Karen Jones	06/26/2014 23:51:03
Negatives in Red	Global	Karen Jones	04/08/2014 12:19:02
Percent of Total Growth	Global	Karen Jones	06/25/2014 21:11:37
Percent of Total Growth with Cell Coloring	Global	Karen Jones	05/12/2014 13:27:49
Sales vs Budget Indicator	Personal	Mary Lancaster	04/07/2014 13:24:56

1 to 10 of 10 ||<< 1 >>||

Custom OK Cancel

1	<p>Selected Conditional Format – If a conditional format has been selected, the name of it displays here.</p>
2	<p>Available Conditional Formats – Click a conditional format then OK to apply it to a measure item.</p> <ul style="list-style-type: none"> This is a list of all formats that meet search and filter criteria. You can search to find formats with a particular name or use the filter tool to look up formats of only certain users (See Search and Filter Features). You can use the Show Details section to look up format properties and rules. To sort the displayed formats, click the Name, Type, Owner, or Last Used column heading. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange columns in the section, 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), this is a count of how many formats are displayed in the window. There are paging arrows to move between pages of formats. Arrows are active only when more formats exist than can be displayed in a single page of this section. <p>1 to 27 of 27 << 1 >> </p>

3

Custom – Click Custom if you need to switch to the Custom Conditional Format window, which is used to define a custom conditional format for the selected measure item. Custom conditional formats are for one time use. They cannot be reused. Pre-defined formats that show in the Select Conditional Format window can be reused across different views.



OK – Click OK to apply the conditional format 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 conditional formats.

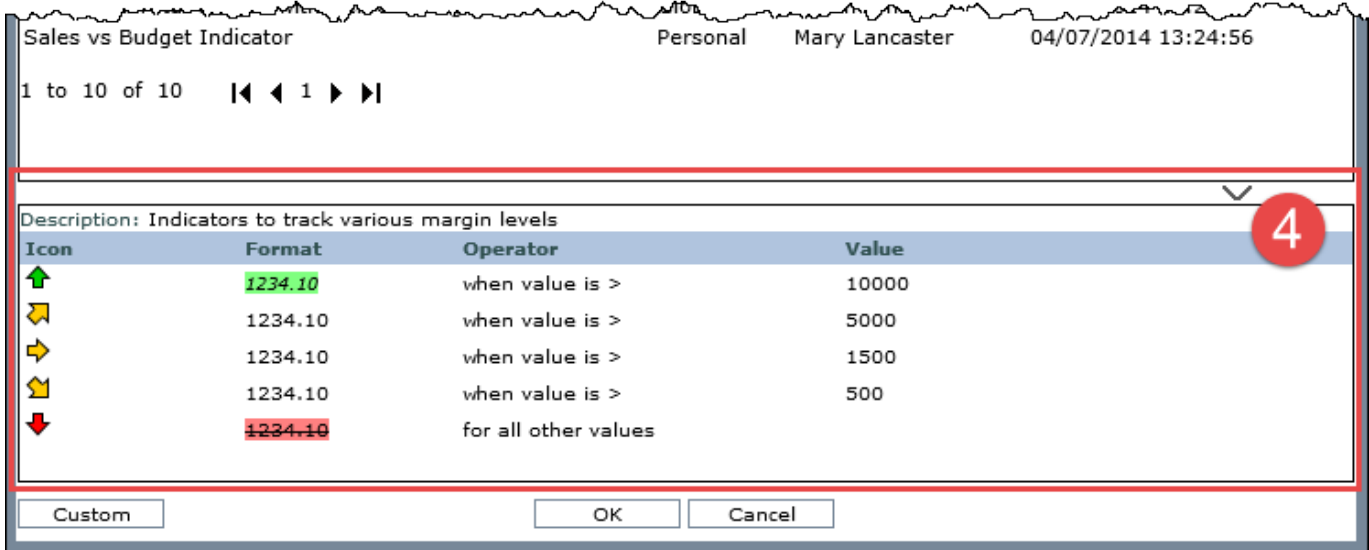
Name	Type	Owner	Last Used
Freight Cost Difference	Global	Mary Lancaster	05/16/2014 14:16:25
Greater than 1000	Global	Valeria Ardell	05/13/2014 11:37:33
Greater than 500	Global	Valeria Ardell	05/09/2014 13:11:24
Greater than 5000	Global	Allen Pravan	05/09/2014 16:03:41
Gross Margin Tracking	Global	Mary Lancaster	06/27/2014 00:42:38
Map It	Global	Karen Jones	06/26/2014 23:51:03

- **Search** – Enter all or part of the name(s) of the format(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 Global and Personal checkboxes to the left of a user's name to indicate whose formats you want to see (users with selected checkboxes will be included in filter results). The checkboxes next to the Global and Personal headings are toggles that select or deselect all Global or Personal formats of all users at one time (for example, if the Personal heading checkbox is selected, all Personal formats of all users will display in the window). At the bottom of the filter section (you may need to scroll down), there is a count of users. 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.

Note: The filter toggle will be red  if a filter has been applied. If you are using the filter section and then access the details section of the window, the filter section will close automatically.

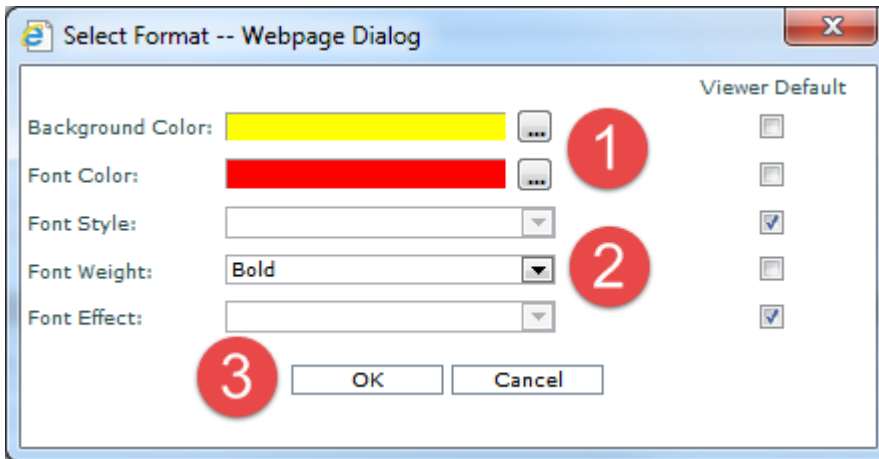
Show Details Feature

Optionally use this section to view details about the format that is actively selected in the window. Select a format and then click the Show Details ^ button. Click the Hide Details v button to hide the section. You can see the description of the format and the Icon, Format, Operator, and Value of each rule in the format definition.



Note: If you are using the details section and then access the filter section of the window, the details section will close automatically.

Select Format Window




1


Background Color– Defines the background color for the conditional format rule. If Viewer Default is selected, then Viewer background colors will be used. If Viewer Default is not selected, then use the Browse button [Browse] to choose the background color for the rule. The text box to the left will display the selected color.

Font Color – Defines the font color for the rule. If Viewer Default is selected, then Viewer font colors will be used. If Viewer Default is not selected, then the use the Browse button [Browse] to choose the font color for the rule. The text box to the left will display the selected color.

2

Font Style – Defines the font style for the rule. If Viewer Default is selected, then Viewer font styles will be used. If Viewer Default is not selected, then use the drop down list button [Dropdown] to choose a font style for the rule. Valid options are: Normal, Italic, Oblique.

Font Weight - Defines the font weight for the rule. If Viewer Default is selected, then Viewer font weights will be used. If Viewer Default is not selected, then use the drop down list button  to choose a font weight for the rule. Valid options are: Normal or Bold.

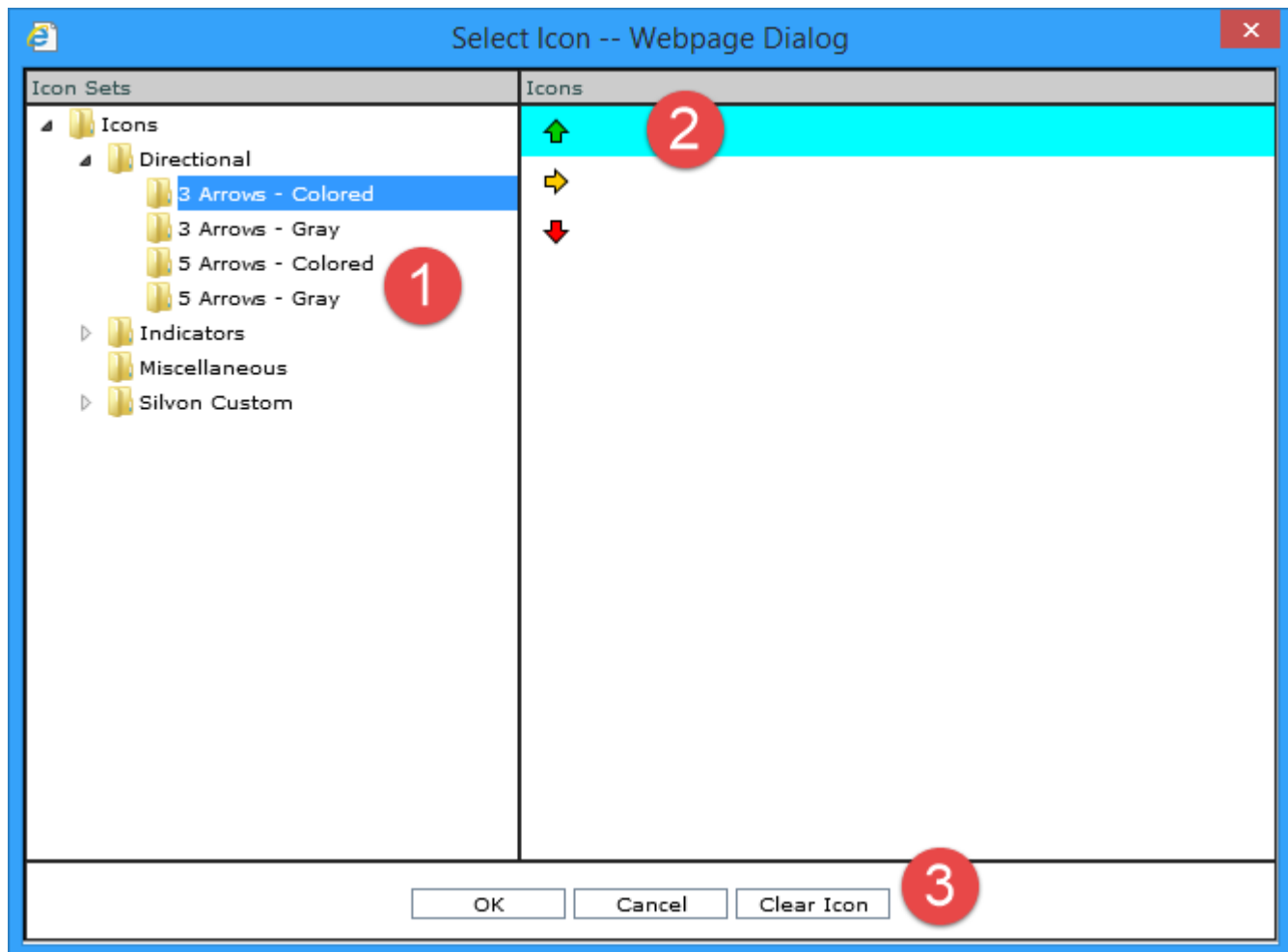
Font Effect - Defines the font effect for the rule. If Viewer Default is selected, then Viewer font effects will be used. If Viewer Default is not selected, then use the drop down list button  to choose a font effect for the rule. Valid options are: None, Underline, Overline, Strikethrough.

3

OK – Click to save any edits made on this window and close the window.

Cancel – Click to close the window without making any changes.

Select Icon Window



1

Icon Sets – An icon set is a group of related icons. Once an icon set is selected, all icons included in that set display on the right side of the window and are available for selection.

A predefined icon set directory, subfolders and icons are included with your Stratum.Viewer installation to support the conditional formatting functionality. If additional icons are required, they can be added. All custom icons must reside in a subfolder of the Images / Icons folder of the Stratum.Viewer application. Valid file types are *.png, *.jpg, *.gif, *.tif, *.tiff, and *.bmp.

2

Icons – All available icons in the selected icon set display here with the icon selected for the active rule highlighted. Click an icon to select it for a conditional format rule.

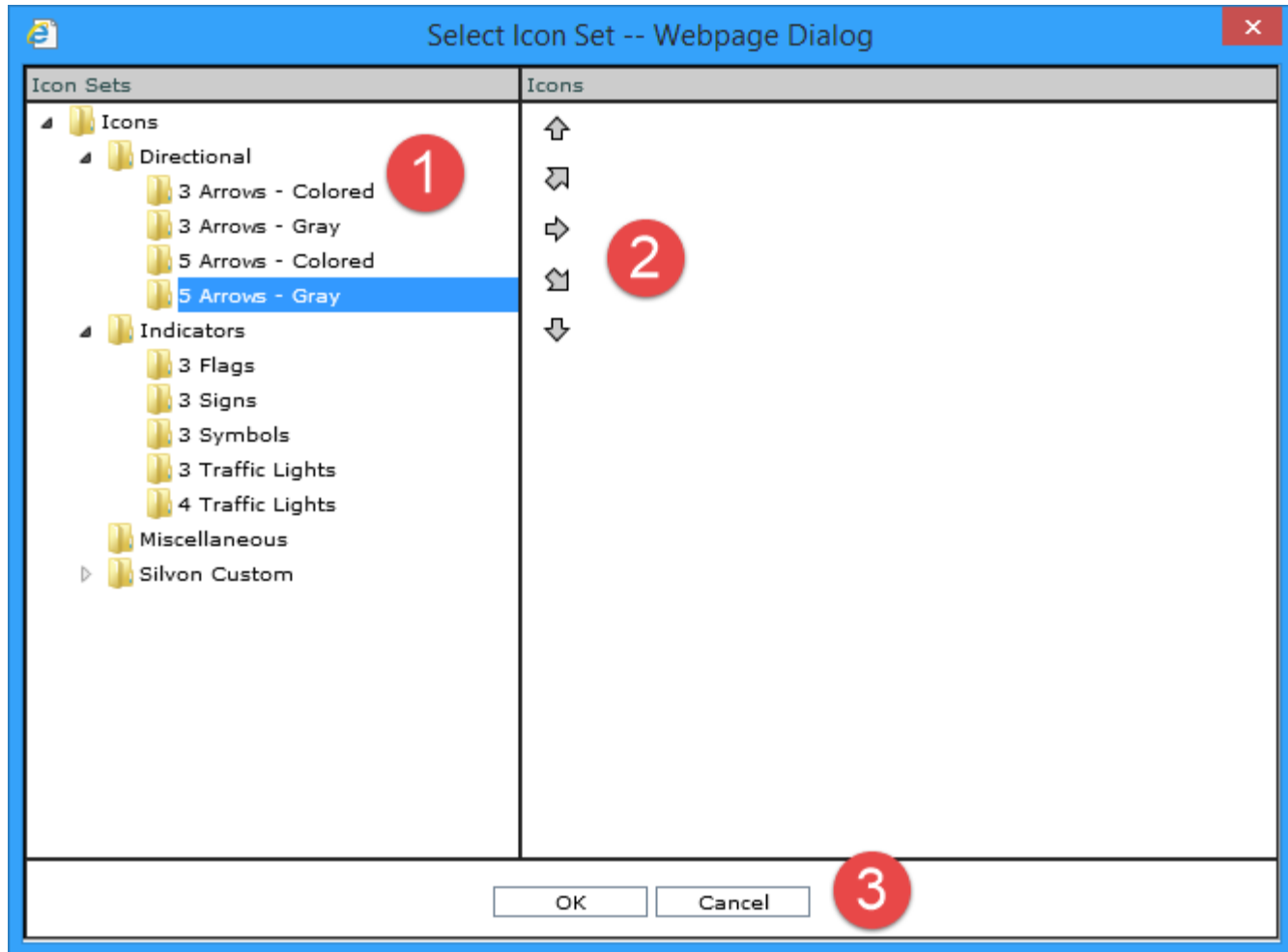
3

OK – Click to save any edits made on this window and close the window.

Cancel – Click to close the window without making any changes.

Clear Icon – Click to clear the icon selected for the active rule with confirmation.

Select Icon Set Window



1

Icon Sets – An icon set is a group of related icons. Once an icon set is selected, all icons included in that set display on the right side of the window.

2

Icons – All available icons in the selected set display here. The icons will pre-fill the rules and icons for a conditional format. For example, if the icon set “5 Arrows – Gray” is selected, then 5 rules will be created and prefilled with the icons from the set.

3

OK – Click to select the icon set to be used to pre-fill the rules and icons for the conditional format.

Cancel – Click to close the window without selecting an icon set.

Select User Window

Main Window Sections

First Name	Last Name	Accessibility Level	User Group
Adam	Green	Casual	Casual User
Allen	Pravan	View Administrator	View Administrator
Carrie	Jacobs	Casual	Casual User
Chris	Davis	Casual	Casual User
Derek	Temple	View Administrator	View Administrator
Michael	Aspen	Casual	Casual User
Paul	Orland	Casual	Casual User
Phil	MacMillan	Casual	Casual User
Sherry	Renee	Casual	Casual User
Terry	Keifer	Casual	Casual User
Terry	Nagee	View Administrator	View Administrator
Valeria	Ardell	View Administrator	View Administrator

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. <ul style="list-style-type: none">• 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. <p>1 to 27 of 27 << < 1 > >></p>



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.

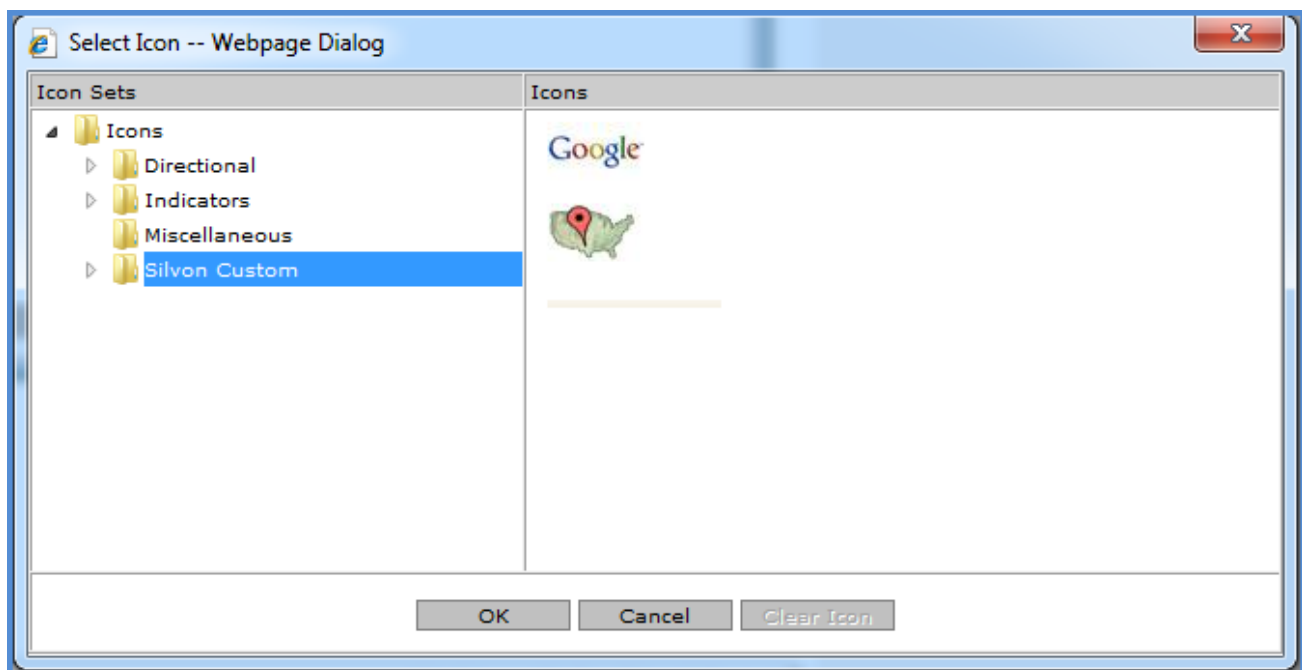
Add Custom Icons for Conditional Formatting

Pre-defined icon sets and icons are included with your Stratum.Viewer installation to support the conditional formatting functionality. All conditional format icons must reside in a subfolder of the Images/Icons folder of the Stratum.Viewer application. The files type must be *.png, *.jpg, *.gif, *.tif, *.tiff, or *.bmp.

The Select Icon and the Select Icon Set windows display all the subfolders for the Images/Icon folder. The right hand side of the windows displays all the *.png, *.jpg, *.gif, *.tif, *.tiff, or *.bmp files that exist in the selected folder.


If additional icons sets and icons are needed, they must be added to an appropriate subfolder of the Images/Icon folder of the Stratum.Viewer application. In the example below, a “Silvon Custom” subfolder has been added to the Images/Icon folder of the Stratum.Viewer application. Two files, google.jpg and map.jpg, were added.

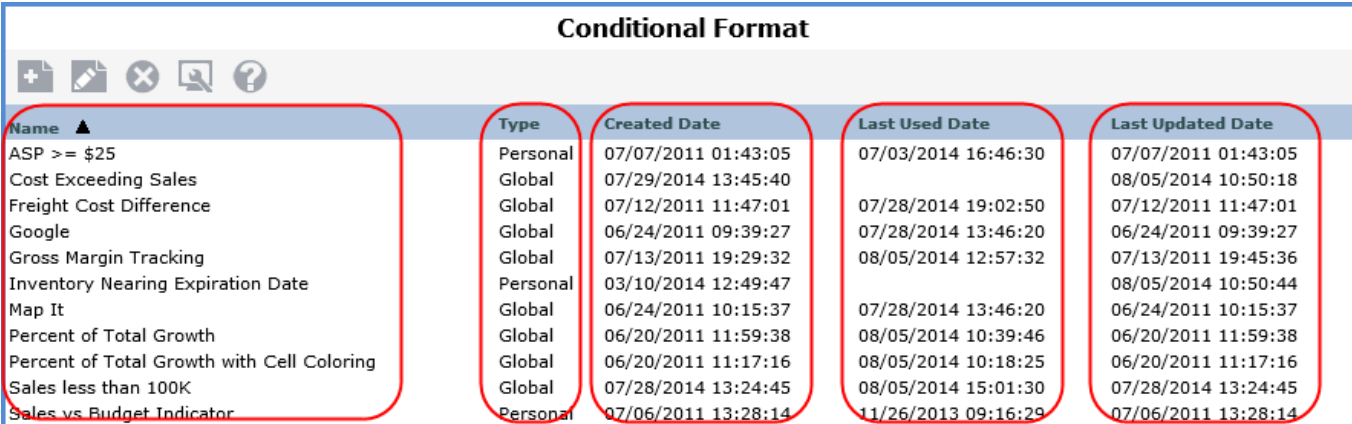
Note: The files used by Conditional Formatting will display in the Viewer grid using its original, default size.



Change the Conditional Format's Display Options

Here are the steps for adjusting the information that displays on the [Conditional Format list window](#), followed by an example.



1. From the Conditional Format list window, click the Display Options button  to access the [Display Options window](#). Choose information to display as separate columns within the Conditional Format list window by selecting the appropriate checkbox.
 - **Name:** Display the user-defined conditional format name.
 - **Description:** Display the user-defined conditional format description.
 - **Type:** Display the global or personal status of the conditional format.
 - **Created Date:** Display the system date that the conditional format was created.
 - **Last Used By:** Display the user ID of the person who last used the conditional format.
 - **Last Used Date:** Display the system date that the conditional format was last used.
 - **Owner:** Display the name of the owner/creator of the conditional format.
 - **Last Updated Date:** Display the system date that the conditional format was last updated and saved.
2. Click OK to close the Display Options window and redisplay the Conditional Format list window with the selected information displayed. In the below example, Name, Global, Created Date, Last Used Date, and Last Updated Date checkboxes were selected on the Display Options window.






Name ▲	Type	Created Date	Last Used Date	Last Updated Date
ASP >= \$25	Personal	07/07/2011 01:43:05	07/03/2014 16:46:30	07/07/2011 01:43:05
Cost Exceeding Sales	Global	07/29/2014 13:45:40		08/05/2014 10:50:18
Freight Cost Difference	Global	07/12/2011 11:47:01	07/28/2014 19:02:50	07/12/2011 11:47:01
Google	Global	06/24/2011 09:39:27	07/28/2014 13:46:20	06/24/2011 09:39:27
Gross Margin Tracking	Global	07/13/2011 19:29:32	08/05/2014 12:57:32	07/13/2011 19:45:36
Inventory Nearing Expiration Date	Personal	03/10/2014 12:49:47		08/05/2014 10:50:44
Map It	Global	06/24/2011 10:15:37	07/28/2014 13:46:20	06/24/2011 10:15:37
Percent of Total Growth	Global	06/20/2011 11:59:38	08/05/2014 10:39:46	06/20/2011 11:59:38
Percent of Total Growth with Cell Coloring	Global	06/20/2011 11:17:16	08/05/2014 10:18:25	06/20/2011 11:17:16
Sales less than 100K	Global	07/28/2014 13:24:45	08/05/2014 15:01:30	07/28/2014 13:24:45
Sales vs Budget Indicator	Personal	07/06/2011 13:28:14	11/26/2013 09:16:29	07/06/2011 13:28:14







Change the Owner of a Conditional Format

View and security administrators can change the owner of any conditional format. The [Select User window](#) is used to change the owner.

1. Click the Conditional Format option in the Admin Utilities view group.
2. From the Conditional Format list window, click the name of the conditional format then click Edit  (or double-click the conditional format name).
3. In the Attributes section of the Conditional Format Maintenance window, click the Browse button  for the Owner property.

- 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.
- Click Save .

Conditional Format Maintenance



General

Name:

Description:

Type:

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is < <input type="text" value="0"/>		<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	for all other values		

Attributes

Created Date: 07/06/2011 13:28:14

Owner:

Last Updated Date: 07/06/2011 13:28:14

Last Updated By: Allen Pravan


Last Used Date: 04/07/2014 13:24:56

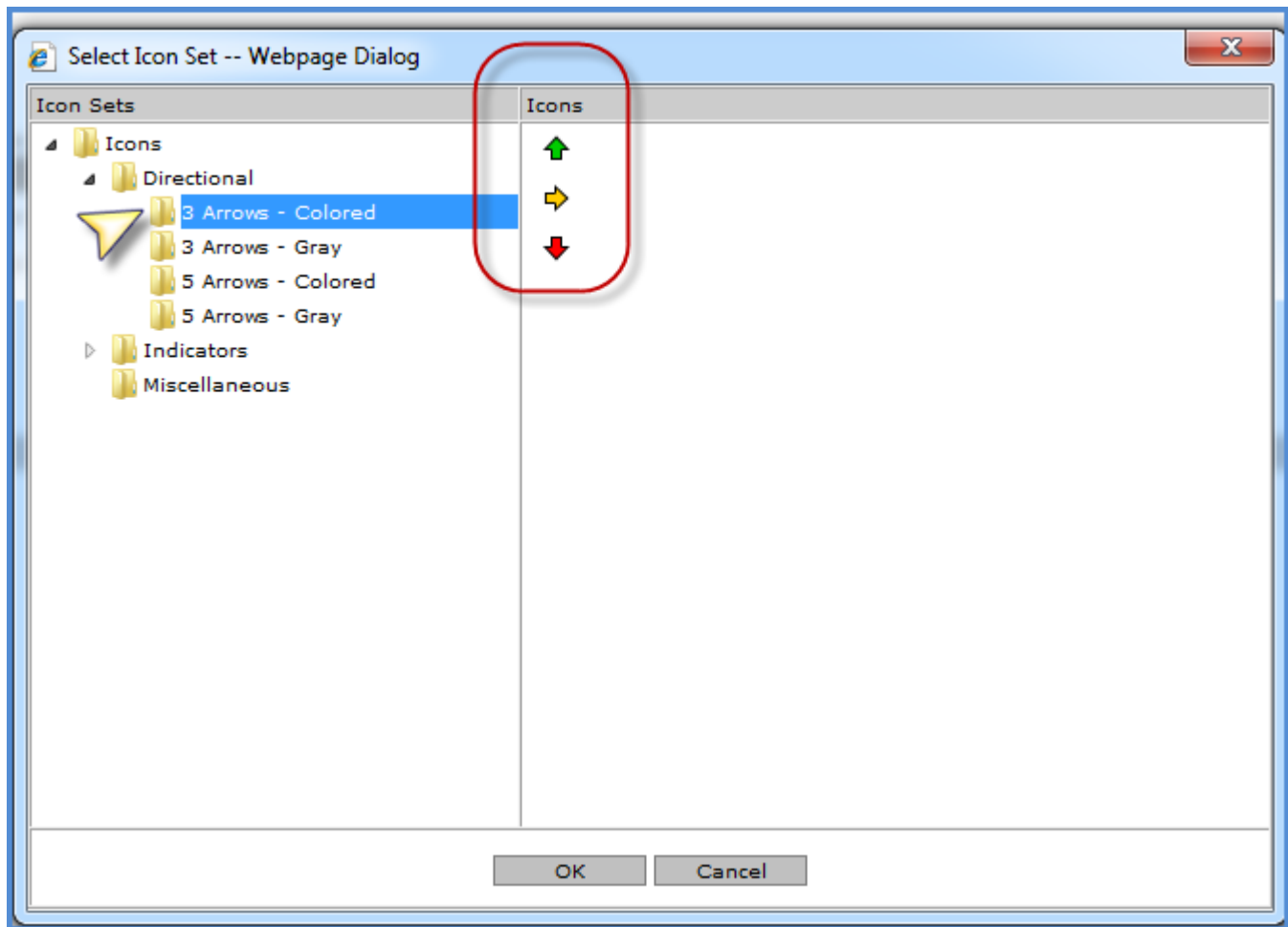
Last Used By: Donna [Redacted]

Use Pre-fill Icons

You can select an icon set to pre-fill the rules and icons for the conditional format. Stratum.Viewer has predefined icon set and icons to choose from. You can also add additional icon sets. Please see [Add Custom Icons for Conditional Formatting](#).

Here are the steps for using pre-filled icons.

1. From the Conditional Format Maintenance window, click the Pre-fill icons window button  to open the Select Icon Set window.
2. Highlight the icon set folder you want. The icons included in that icon set will display in the right side of the window.



- Click OK and the [Conditional Format Maintenance window](#) will redisplay with blank rules for each icon included in the selected set. Then you can complete the rules for the conditional format.

Conditional Format Maintenance

General

Name:

Description:

Type:

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options	
	1234.10	Icon	Format	when value is = <input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10	Icon	Format	when value is = <input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
	1234.10	Icon	Format	for all other values	

Save a Custom Conditional Format

Custom conditional formats can be created on-the-fly, and they are not available for use in other views or by other users unless they are saved as a conditional format. However, you can perform a Save As on a custom conditional format to create a new conditional format that can be used in other views.

Here are the steps for saving a custom conditional format, followed by an example.

- From the [Select Conditional Format window](#), click the Custom button to open the [Custom Conditional Format window](#).
- Define all the rules to be applied to the measure item.
- Click the Save As button to open the [Save Custom Conditional Format As window](#).
- If a name and / or description were entered on the Custom Conditional Format window, they default on the Save Custom Conditional Format As window. After specifying a name, description, and whether or not the conditional format is global, click the Save button. For advanced users, the Type property defaults to Personal and is disabled.

Save Custom Conditional Format As -- Webpage Dialog

Name:

Description:

Type:

5. The custom conditional format is saved as a conditional format. The Select Conditional Format window is redisplayed with the newly saved conditional format selected (highlighted) in the listing.



Name	Type	Owner	Last Used
Cost Exceeding Sales	Global	System Defaults	
Customer Percent of Total	Personal	System Defaults	
Freight Cost Difference	Global	System Defaults	07/28/2014 19:02:50
Google	Global	System Defaults	07/28/2014 13:46:20
Gross Margin Tracking	Global	System Defaults	08/05/2014 12:57:32
Map It	Global	System Defaults	07/28/2014 13:46:20
Percent of Total Growth	Global	System Defaults	08/05/2014 10:39:46
Percent of Total Growth with Cell Coloring	Global	System Defaults	08/05/2014 10:18:25
Sales less than 100K	Global	System Defaults	08/05/2014 15:01:30

Frequently Asked Questions (FAQ's)

Can Global Conditional Formats be Assigned to Any Type of View?

Yes. Global conditional formats may be used with global, personal, or shared views.

Can Personal Conditional Formats be Assigned to Any Type of View?

Yes. Personal conditional formats may be used with global, personal, or shared views.

Why can't I Add a Conditional Format?

You are a casual user. View and security administrators can add, edit, and delete global and personal conditional formats. They can also edit and delete conditional formats owned by other users. Advanced users can add, edit, and delete their own personal conditional formats.

Why do Blank Boxes Show in Views or Conditional Format Windows?

Blank boxes indicate that a file used for a view image or conditional format icon is missing. A file that is deleted, moved, or renamed is considered a missing file. Normally, a red x would display in place of missing files; however, in some cases you may see a blank box instead.

Blank boxes and red x's can be corrected for conditional formats by replacing missing file or updating the conditional format. Blank boxes and red x's can be corrected for images by replacing the missing file or updating the measure item expression.

See also: [Why do Red X's Show in Views or Conditional Format Windows?](#)

Example

Here is a view with a conditional format on the last measure item.

+ View Name: <i>Product Sales, Returns, Margins</i>				
View Filter				
Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	↓
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	↓
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	↔
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	↔
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	↓
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	↓
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	↔
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	↓
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	↓
Escalloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	↔
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	↔
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	↔
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	↑
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	↓
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	↔
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	↑
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	↓
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	↓

Here is a conditional format window showing icons selected for each conditional format rule.

Conditional Format Maintenance

+ 📄 🔍 ✖ ↩ ?

General

Name:

Description:

Type: Pre-fill Icons

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
↑	1234.10	Icon Format	when value is > 10000	Add Remove
↔	1234.10	Icon Format	when value is > 5000	Add Remove
↓	1234.10	Icon Format	for all other values	

The files for the Conditional Format icons were deleted, which results in blank boxes the next time the user runs the view.

View Name: Product Sales, Returns, Margins

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	<input type="checkbox"/>
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	<input type="checkbox"/>
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	<input type="checkbox"/>
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	<input type="checkbox"/>
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	<input type="checkbox"/>
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	<input type="checkbox"/>
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	<input type="checkbox"/>
Pear 6oz LnchPk I.S. 0A	\$19,189	(\$2,301)	\$14,551	<input type="checkbox"/>

The blank boxes also show in conditional format windows, such as the Conditional Format Maintenance window.

Conditional Format Maintenance

General

Name:

Description:

Type:

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
<input type="checkbox"/>	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is >	10000	<input type="button" value="Add"/> <input type="button" value="Remove"/>
<input type="checkbox"/>	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is >	5000	<input type="button" value="Add"/> <input type="button" value="Remove"/>
<input type="checkbox"/>	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	for all other values		

The user can select new icons for each rule. Here are the new selections for the rules followed by the updated view reflecting the changes.

Conditional Format Maintenance

General

Name:

Description:

Type:

Display the following icons and formats according to these rules:

Icon	Format	Operator	Value	Options
●	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is >	<input type="text" value="10000"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
●	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	when value is >	<input type="text" value="5000"/>	<input type="button" value="Add"/> <input type="button" value="Remove"/>
●	1234.10 <input type="text" value="Icon"/> <input type="text" value="Format"/>	for all other values		

View Name: Product Sales, Returns, Margins

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	\$9,513	(\$965)	\$6,725	●
Peach Hlvs HS 12 oz BR* 0A	\$6,243	(\$570)	\$4,663	●
Applesauce 12oz BR* 0A	\$34,138	(\$3,717)	\$26,406	●
FrtCktail HS 12 oz BR* 0A	\$20,521	(\$1,788)	\$15,423	●
Pear Slcs LS 12 oz BR* 0A	\$25,353	(\$5,206)	\$21,443	●
Peach Hlvs LS 12 oz BR* 0A	\$12,838	(\$1,256)	\$9,053	●
Peach Slcs LS 16 oz BR* 0A	\$19,834	(\$1,424)	\$14,530	●
Pear 6oz LnchPk LS 0A	\$19,189	(\$2,301)	\$14,551	●
Mand Org Pcs 12oz BR* 0A	\$18,021	(\$2,537)	\$13,161	●
Escaloped Apples 12 oz BR* 0A	\$19,896	(\$1,422)	\$14,362	●
Peach Slcs HS 12 oz BR* 0A	\$27,096	(\$2,678)	\$20,638	●
Sw Cherries Pittd 12oz BR* 0A	\$39,388	(\$3,823)	\$31,181	●
Peach Slcs LS 12oz BR* 0A	\$58,094	(\$9,114)	\$41,445	●
Tropical Mix LS 12oz BR* 0A	\$13,052	(\$833)	\$10,608	●
Peach 6oz LnchPk BR* 0A	\$32,883	(\$2,805)	\$25,054	●
Pnappl Slcs 12 oz BR* 0A	\$127,980	(\$13,615)	\$95,597	●
Prunes Pitted 12 oz BR* 0A	\$4,424	(\$1,053)	\$3,135	●
Pnappl Bites 12oz BR* 0A	\$7,296	(\$1,170)	\$5,419	●

Why do Red X's Show in Views or Conditional Format Windows?

Red x's indicate that a file used for a view image or conditional format icon is missing. A file that is removed, moved, or renamed is considered a missing file. Normally, a red x would display in place of missing files; however, in some cases you may see a blank box instead.

Blank boxes and red x's can be corrected for conditional formats by replacing missing file or updating the conditional format. Blank boxes and red x's can be corrected for images by replacing the missing file or updating the measure item expression.







See also: [Why do Blank Boxes Show in Views or Conditional Format Windows?](#)

Example







Here is a view with a calculated measure item that displays product images.

 Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	 Actual Sales Sales Units Jan 2014 to Sep 2014	Actual : Jan 20
620A954020	Navel Oranges 0A	D		19.462	
620B954000	Red Ripe Tomatoes 0B	B		15.195	
620A954017	Cherries, Bing 0A	D		13.674	
620A954014	Asparagus 0A	B		13.091	
620A954011	Baby Carrots 0A	A		12.692	
620A954016	Strawberries 0A	C		12.320	
620A954008	Bananas 0A	A		4.588	

The files for the product images are moved, resulting in red x's the next time the user runs the view.

Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual : Jan 20
620A954020	Navel Oranges 0A	D		19.462	
620B954000	Red Ripe Tomatoes 0B	B		15.195	
620A954017	Cherries, Bing 0A	D		13.674	
620A954014	Asparagus 0A	B		13.091	
620A954011	Baby Carrots 0A	A		12.692	
620A954016	Strawberries 0A	C		12.320	

The user updates the calculated measure item expression to reflect the new location for the image files. The refreshed view displays the desired product images once again.

Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	Actual Sales Sales Units Jan 2014 to Sep 2014	Actual : Jan 20
620A954020	Navel Oranges 0A	D		19.462	
620B954000	Red Ripe Tomatoes 0B	B		15.195	
620A954017	Cherries, Bing 0A	D		13.674	
620A954014	Asparagus 0A	B		13.091	
620A954011	Baby Carrots 0A	A		12.692	
620A954016	Strawberries 0A	C		12.320	
620A954008	Bananas 0A	A		4.588	

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.

Custom Conditional Format vs. Conditional Format

Conditional formats are pre-defined by administrators and advanced users and can be associated with measure items to visually represent and highlight data in the Viewer grid. Custom conditional formats can be created on-the-fly, are intended to be used only one time, and are only associated with a single measure item. They are not available for use in other views or by other users.