Working with User Lists
Stratum.Viewer 6

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- Dimension
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Getting Started

Access to User Lists

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

User Profile Level	🧩 Personal Lists*				🌐 Global Lists				Security Lists			
	Add	Edit	Delete	Use for Filtering	Add	Edit	Delete	Use for Filtering	Add	Edit	Delete	Use for Filtering**
Casual				x				x				x
Advanced	x	x	x	x				x				x
View Administrator	x	x	x	x	x	x	x	x				x
Security Administrator	x	x	x	x	x	x	x	x	x	x	x	x

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

**Only security user lists that are defined as global can be used for filtering in views.

Introduction to User Lists

User lists are one of the filtering tools available to you in this application. Lists are a convenient way to pre-define a group of members that can then be used for filtering purposes over and over again in different views. For example, a Product Manager could set up her own personal user list of members from the Product Groups that she is responsible for managing. She can filter views by that list when she wants to see data specific to her management focus. Administrators can create global user lists that can be used by all users in many different views. User lists save you the step of setting up a member list each time you want to see a specific group of members in various views.

Lists also provide administrators the ability to secure a dimension by using a security user list as a means of controlling access to the dimension members. The same security user list can be applied to multiple roles. To use a list in this manner, an administrator needs to enable a Security User List property when they are creating the list. See also When to Create Security User Lists.

Another layer of convenience offered by user lists is the option to create dynamic or static user lists.

- **Dynamic** - The members in a dynamic user list meet one or more business conditions and are continually updated based on the most current set of master file data. An expression defined for the list is evaluated against the master data, and only members that meet the expression criteria will populate the list. For example, you could create a dynamic user list on the Product level that returns Product members with values in the range of 954023 through 954622. See also Example Dynamic User List Expressions.
- **Static** - When your filtering needs are more fixed, you can set up static user lists and choose specific members for the list. For example, you could create a static user list on the ABC Classification level and choose the A and B members for it. The members in a static user list only change when you manually edit the list.

Example

An administrator creates a global user list containing 5 members of the Product Brand level. The list is then applied as a filter in a view that has the RepBroker and Product Brand levels in the grid.

Here is the view, showing just the members specified by the user list filter.

View Name: _Farming Div Brands, Sales by Broker_

Filtered With User List: Fresh Farm Division Brands

RepBroker	Product Brand	PBrnd Long Description	Actual Sales Sales Amount	Actual Sales Sales Units	Budget Budget Ar Working
300	004	Idaho Delight	$24,751,328	660,551	$24
	005	Farm Crisp	$37,753,712	994,851	$37
	009	Farm Fresh	$2,766,081,270	55,221,136	$2,826
	010	Prime Grown	$173,064,464	2,714,985	$177
	011	First Choice	$1,417,310,653	40,480,341	$1,446
300 Total			**$4,418,961,427**	**100,071,864**	**$4,511**
301	004	Idaho Delight	$6,872,954	184,884	$6
	005	Farm Crisp	$11,199,907	292,689	$11
	009	Farm Fresh	$69,803,017	1,490,042	$71
	010	Prime Grown	$50,442,139	811,319	$49
	011	First Choice	$11,512,704	198,527	$11
301 Total			**$149,830,721**	**2,977,461**	**$151**
302	004	Idaho Delight	$15,726,658	414,254	$16
	005	Farm Crisp	$28,835,208	734,397	$29
	009	Farm Fresh	$172,938,542	3,521,895	$176

Tasks - Using

Filter Objects with User Lists

Views

1. Right-click a level in a view grid, and select Filter then Edit.

2. Select the User List option, and then click OK in the Select Filter Method window.

3. Select a list from the Select User List Filter window. Use the search or filter ⟁ tools as aids in finding a list. Optionally click Show Details ⌃ after selecting a list to see more information about it before applying it as a filter. Click OK to apply the selected list as a filter.

4. Click OK once you have determined which list to use for filtering the level.

Roles

1. While adding or editing a role in the Role Maintenance window, click the Attributes tab.

2. Scroll to the dimension attribute for which you need to define access permissions.

3. In the Access drop-down list for that attribute, select Partial - User List.

4. Select a list from the Select User List Filter window. Use the search or filter ⏚ tools as aids in finding a list. Optionally click Show Details ⌃ after selecting a list to see more information about it before applying it as a filter. Click OK to apply the selected list as a filter.

5. Click OK once you have determined which list to use for filtering the dimension attribute.

Tasks - Managing

Add a User List

1. Click User List in the Admin Utilities view group.

2. Click New in the User List window.

3. Set up basic properties in the User List Maintenance window:

   - Description is optional.
   - View and security administrators can designate the list as a globally available list by selecting Global as the Type. Otherwise the list will be a personal list.
   - Security administrators can designate the list as a security list by selecting the Security User List checkbox. The list will be available to administrators for filtering purposes when they set up roles in addition to being available for filtering views.

4. Choose a list Mode, either static or dynamic.

5. The Server and Database drop-down lists will default to the server and database associated with your user profile's role. If you are a security administrator and there are multiple databases registered with Stratum.Viewer, you will need to select which server and database to use for the list.

6. Use the Dimension, then Hierarchy, and then Level drop-down lists to determine the level on which to base the list.

7. **For Static Lists**, click Members, and choose members from the Select or Advanced Select Members window that displays.

   OR

7. **For Dynamic User Lists:**

   - Click Browse , and use the Expression window to set up an expression for determining the list members. See also Example Dynamic User List Expressions.
   - Select the Batch Process checkbox if you want the list definition processed and updated with members during every process of the Stratum.Connector for Viewer Analysis Services database. If you do not select Batch Process, you can manually update the list by clicking Process .
   - {Optional} To fine tune the expression for the list, you can do an initial save then click Process. A count of members that meet the expression criteria displays in the Attributes section. You can click the Members button to see a list of those members. If needed, adjust the expression until the members returned fit your analysis needs and then proceed with a final save (step 8).

8. Save the user list.

Delete a User List

1. Click User List in the Admin Utilities view group.

2. Select one or more list from the User List window, then click Delete ⊗. You can use Ctrl+Click and Shift+Click to select more than one list.

3. Confirm the deletion.

   OR

1. If you are viewing the list from the User List Maintenance window, click Delete ⊗.

2. Confirm the deletion.

Edit a User List

1. Click User List in the Admin Utilities view group.

2. In the User List window, double-click the user list that you want to edit.

3. Edit list properties and members in the User List Maintenance window:

   - You can edit properties that remain enabled including the name, description, and mode (static or dynamic).
   - View or security administrators can edit the Type drop-down list to control whether the list will be a global or personal user list.
   - Security administrators can edit the Security User List checkbox to control whether or not this list will be a security user list.
   - To edit members for static user lists, click Members and choose members from the Select or Advanced Select Members window that displays.
   - To edit members for dynamic user lists, click Browse [...] and edit the expression in the Expression window. See also Example Dynamic User List Expressions. Select the Batch Process checkbox if you want the list definition processed and updated with members during every process of the Stratum.Connector for Viewer Analysis Services database. If you do not select Batch Process, you can manually update the list by clicking Process ↻.
   - Administrators also can edit the owner of a user list using the Owner property. Clicking the Browse button [...] for the property opens a Select User window for changing the owner.

4. Save [💾] the user list.

Note: If the Save button is disabled, that means you are not permitted to save edits to the list. In that case, you can click Save As [🖫] and create a new list based on the edits you just made. See Why can't I Save Changes to a User List?.

Use "Save As" to Create a New User List

1. Click User List in the Admin Utilities view group.

2. In the User List window, double-click the user list that you want to use as the starting point for the new list.

3. When the user list opens in the User List Maintenance window, click Save As [icon].

4. Set up the basic properties for the new user list in the Save User List As window:

   - Description is optional.
   - If you are a view or security administrator, you can make this list a global user list by selecting Global as the Type. Otherwise, the list will be a personal list.
   - If you are security administrator, you can make this list a security user list by selecting the Security User List checkbox.

5. Click Save in the Save User List As window.

6. Make any additional edits in the User List Maintenance window that displays:

   - You can leave the Mode as is, or change it to the desired type -- either Static or Dynamic.
   - To edit members for static user lists, click Members and choose members from the Select or Advanced Select Members window that displays.
   - To edit members for dynamic user lists, click Browse [icon] and edit the expression in the Expression window. See also Example Dynamic User List Expressions. Select the Batch Process checkbox if you want the list definition processed and updated with members during every process of the Stratum.Connector for Viewer Analysis Services database. If you do not select Batch Process, you can manually update the list by clicking Process [icon].

7. Save [icon] the user list.

View Members in a List

While Maintaining a List:

1. In the User List Maintenance window, click Members.

While Filtering Objects with a List:

1. In the Select User List Filter window, click the list.
2. Click Show Details [icon].

Examples

Example Dynamic User List Expressions

These tables have example expressions that can be used as models when you are setting up expressions for dynamic user lists.

Note: These same types of expressions can be used when creating expression filters on levels in views.

Members in Expression

For each type of user list expression that follows, a specific example for the Product level is provided followed by the generic MDX format for that type of user list.

Returns Members that are...	Example Expression and MDX
Equal to X	[Product].[Product].CurrentMember IS [Product].[Product].[Product].[954023] *Returns the Product member with a value equal to 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember IS [DimensionName].[HierarchyName].[LevelName].[value]
Not equal to X	[Product].[Product].CurrentMember.Name <> "954023" *Returns Product members with values not equal to 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember.Name <> "value"
Greater than X	[Product].[Product].CurrentMember.Name > "954023" *Returns Product members with values greater than 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember.Name > "value"
Greater than or equal to X	[Product].[Product].CurrentMember.Name >= "954023" *Returns Product members with values greater than or equal to 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember.Name >= "value"
Less than X	[Product].[Product].CurrentMember.Name < "954023" *Returns Product members with values less than 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember.Name < "value"
Less than or equal to X	[Product].[Product].CurrentMember.Name <= "954023" *Returns Product members with values less than or equal to 954023* **Generic MDX Format** [DimensionName].[HierarchyName].CurrentMember.Name <= "value"

In the specified range	[Product].[Product].CurrentMember.Name >= "954023" AND [Product].[Product].CurrentMember.Name <= "954622"
	Returns Product members with values greater than or equal to 954023 and less than or equal to 954622
	Generic MDX Format
	[DimensionName].[HierarchyName].CurrentMember.Name >= "value" AND
	[DimensionName].[HierarchyName].CurrentMember.Name <= "value"
Equal to X OR equal to Y	[Product].[Product].CurrentMember IS [Product].[Product].[Product].[954023] OR [Product].[Product].CurrentMember IS [Product].[Product].[Product].[954622]
	Returns Product members with values equal to 954023 or 954622
	Generic MDX Format
	[DimensionName].[HierarchyName].CurrentMember IS [DimensionName].[HierarchyName].[LevelName].[value 1] OR [DimensionName].[HierarchyName].CurrentMember IS [DimensionName].[HierarchyName].[LevelName].[value 2]

Attribute Relationships in Expression

For each type of user list expression that follows, a specific example for the Customer ShipTo level is provided followed by the generic MDX format for that type of user list.

Return Members with Attribute Relationships that...	Example Expression and MDX
Are equal to the specified text	[Customer Ship To].[Customer Ship To].CurrentMember.Properties("State") = "IL"
	Returns Customer ShipTo members with State equal to "IL"
	Generic MDX Format
	[DimensionName].[HierarchyName].CurrentMember.Properties("AttributeRelationship Name") = "value"
Contain the specified text	(INSTR(1, [Customer ShipTo].[Customer ShipTo].CurrentMember.Properties("ShpTo Postal Code"), "8121") <> 0)
	Returns Customer ShipTo members with Postal Codes that contain the text "8121"
	Generic MDX Format
	(INSTR(1, [DimensionName].[HierarchyName].CurrentMember.Properties("AttributeRelationship Name"), "value") <> 0)
Don't contain the specified text	(INSTR(1, [Customer ShipTo].[Customer ShipTo].CurrentMember.Properties("ShpTo Postal Code"), "2") = 0)
	Returns Customer ShipTo members with Postal Codes that don't contain the text "2"
	Generic MDX Format
	(INSTR(1, [DimensionName].[HierarchyName].CurrentMember.Properties("AttributeRelationship Name"), "value") = 0)

Begin with the specified text	LEFT([Customer ShipTo].[Customer ShipTo].CurrentMember.Properties("ShpTo Postal Code"), 3) = "481"
	Returns Customer ShipTo members with Postal Codes that start with the 3 characters "481"
	Generic MDX Format
	LEFT([DimensionName].[HierarchyName].CurrentMember.Properties("AttributeRelationshipName"), #) = "value"
	The # in the generic format is the length of the string of characters for the specified value text. For example, if the value was "4812" rather than "481" in the Customer ShipTo example, then the # would have been 4 rather than 3 in that expression.

Windows for Using Lists

Select Filter Method Window

Only the Member List and Named Set options display when the window is accessed from the Expression window:

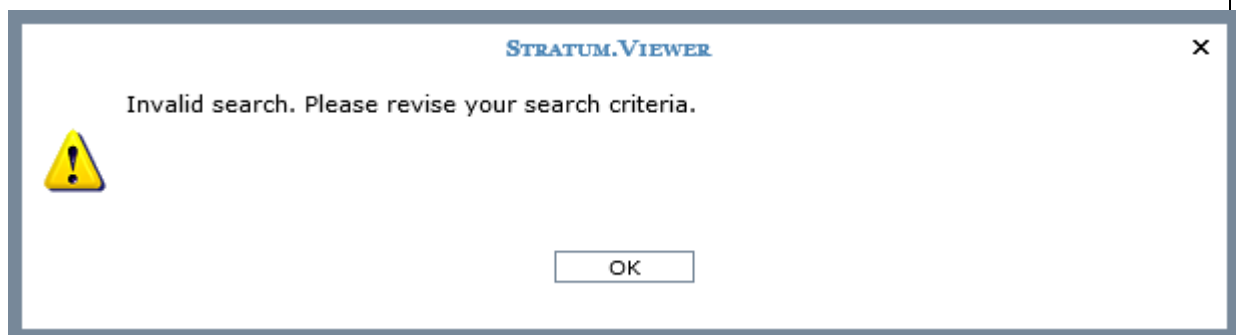|	
①	**Filter Methods** - Choose None then click OK if you are removing a filter. To apply or change a filter, select an option and click OK or use the quick filter option noted in item 2.
	• **Member List** - clicking OK after selecting this option opens the Select or Advanced Select Members window. Search for and select members for the filter.
	• **User List** - clicking OK after selecting this option opens the Select User List Filter window. Use the search or filter ▼ tools as aids in finding a list. Optionally click Show Details ⌃ after selecting a list to see more information about it before applying it as a filter. Click OK to apply the selected list as a filter.
	• **Named Set** - clicking OK after selecting this option opens the Select Named Set Filter window. Select a named set for the filter. See also Named Sets.
	• **Expression** - clicking OK after selecting this option opens the Expression window. Set up an expression for the filter.
②	**Quick Filter Field** – Perform a quick filter by selecting Member List, using this field to specify the level members, then clicking OK. Separate the values in the field by semicolons and do not use any spaces between the values and semicolons.

When using this method and working in a view, you need to refer to members based on the level's display text. For example, enter member values if the level display text is set to Value or enter member attribute relationships if the level display text is set to one of its attribute relationships. Here is a quick filter specified for three Ship-To Markets. The values entered in the field were Chicago;Dallas;Phoenix because the Ship-To Market display text is set to SMkt City:

You will see the following message if you do not refer to members based on their display text setting, if you enter members not applicable to the level, or if you enter members that your role permissions do not permit you to see.

You can enter wildcard criteria in the Quick Filter field. In this example, the Member List option is selected and Product Category has been quick filtered by a wildcard search of %Fruit%. Categories with "Fruit" in their display text were returned by the filter.

Select User List Filter Window

Main Window Sections

1	**Selected User List** – The name of the actively selected list displays here.
2	**Available User Lists** – Click a list then OK to apply the list as a filter. • This is a list of all user lists that meet search and filter criteria. You can use search to find a user list with a particular name or use the filter tool to look up lists of only certain users (See Search and Filter Features). You can use the Show Details section to look up list properties and members. • To sort the displayed lists, 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 lists are displayed in the window. There are paging arrows to move between pages of lists. Arrows are active only when more lists exist than can be displayed in a single page of this section. 1 to 27 of 27 ◀ ◀ 1 ▶ ▶

3	**OK** – Click OK to apply the user list selection made in this window and to close the window. **Cancel** – Click Cancel to close the window without applying your selection.
4	See the next two sections for information about the search, filter, and detail lookup tools in this window.

Search and Filter Features

Optionally use the search and/or filter features (section marked '4' in following image) to look for particular user lists.
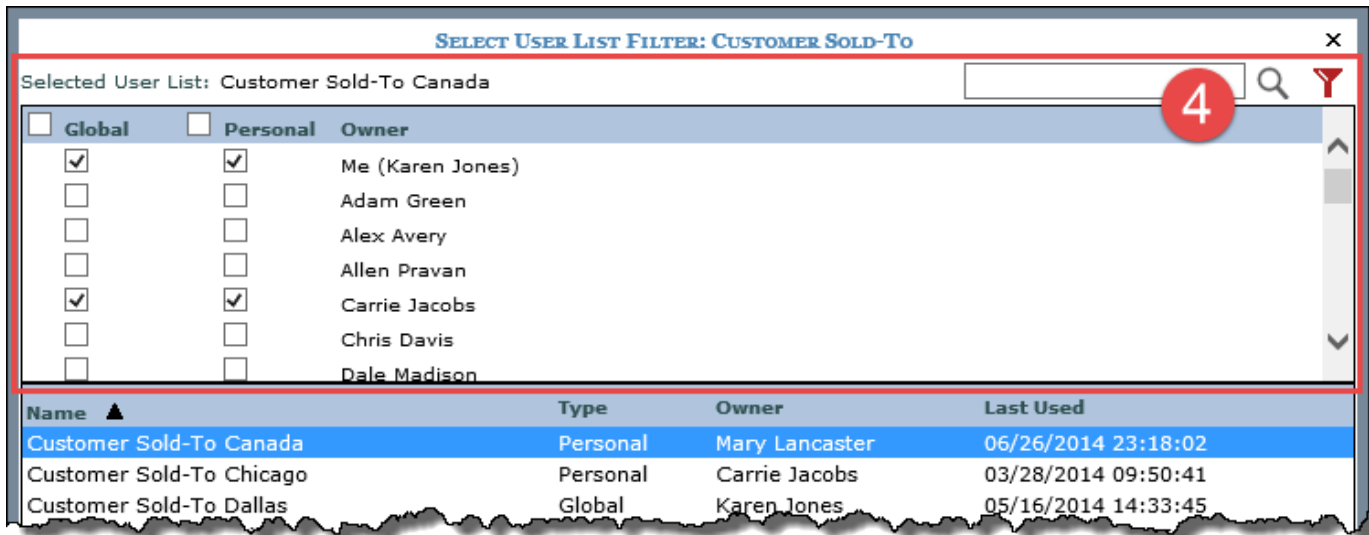
- **Search** – Enter all or part of the name(s) of the list(s) you are searching for and then click the Search button to execute the search.

- **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 lists 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 lists of all users at one time (for example, if the Personal heading checkbox is selected, all Personal lists 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 list that is actively selected in the window. Select a list and then click the Show Details ∧ button. Click the Hide Details ∨ button to hide the section. You can see the members in the list, the list description, count of members in the list, and the list mode (Static or Dynamic).
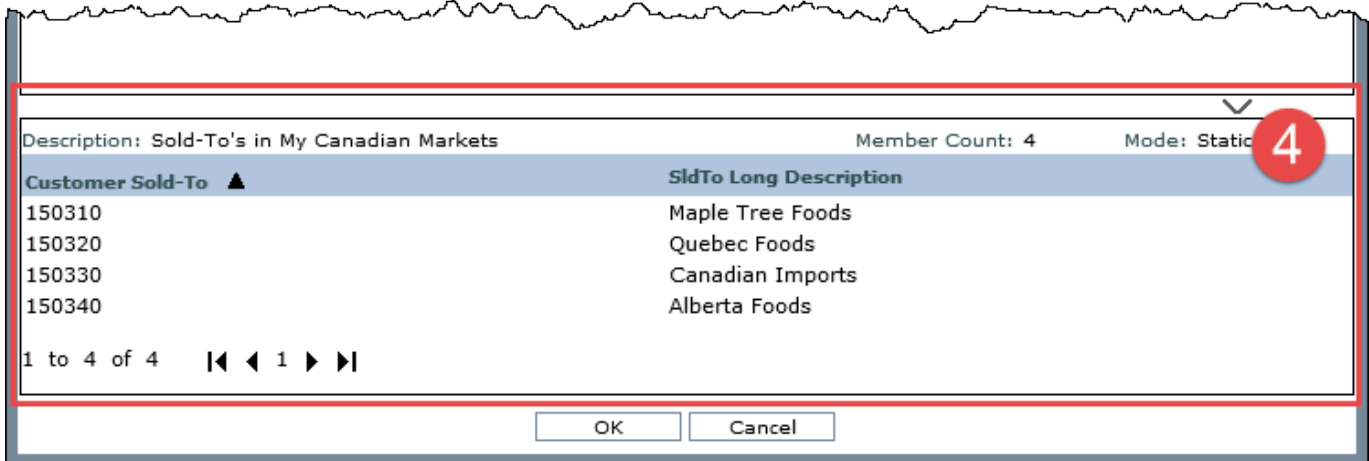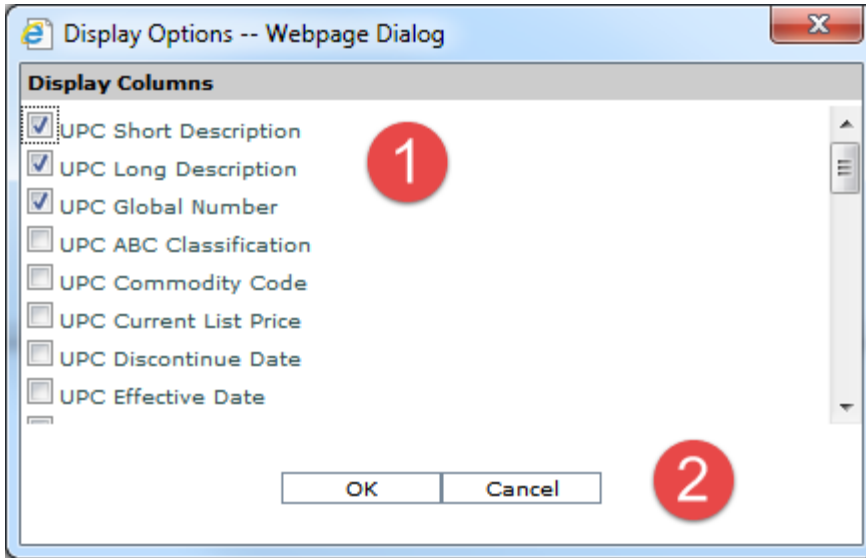

- Information that displays for list members depends on whether you accessed the window from a view or the Role Maintenance window. If accessed from a view, the section displays attribute relationships available for the level in the view. If accessed from the Role Maintenance window, the section displays attribute relationships as defined by administrative settings in the Select Members Options window.

Note: Only members your role permits you to access will display. The section will be blank if your role doesn't permit you to access any of the list members.

- To sort detail information, click the heading for any column of information displayed for the members. 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 the details section (you may need to scroll down), this is a count of how many members are in the list. There are paging arrows to move between pages of members. Arrows are active only when more members exist than can be displayed in a single page of this section.

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

Display Options Window for Member List Window

1	**Display Columns** - Select or deselect columns to control the information that displays on the Member List window for dynamic user lists. The columns that display by default are determined by administrator settings in the Select Members Options window.
2	**OK** - Clicking OK applies the changes for the current session only in the Member List and User List Maintenance windows. Once you exit the windows, display options return to their defaults.

Display Options Window for User List Window

1	**Display Columns** - Select or deselect columns to control the information that displays on the User List window. The window defaults to show list name, level, whether or not the list is a security list (Yes/No), the type (global or personal), and the mode (static or dynamic), and the last used date.
2	**OK** - Clicking OK applies the changes for the current session only in the User List and User List Maintenance windows. If you navigate away from the windows, display columns return to their defaults.

Expression Window for Dynamic User Lists

|	
1	**View Items and Functions** – This section displays the hierarchy and level that you selected for the user list from the User List Maintenance window. When you expand the level, you will see an Attribute Relationships folder and Member folder. • **Levels and Attribute Relationships** - Click a level or attribute relationship to add it to the dynamic user list expression. Objects can also be drag and dropped into the Expression portion of the window. • **Members** - Another tool for building the expression is the Members folder. Click it to access the Select Filter Method window. From there, you can access the Select or Advanced Select Members window. This allows you to select specific members for the expression. Or, you can access the Named Set window and select a named set for the expression in cases when you are working with a single level time dimension. When you select objects in the window for an expression, they are added in MDX format. That format includes a reference to the dimension and hierarchy names for the object and in some cases a reference to member values. You can manually adjust or add to the MDX so that it fits your user list filtering needs. Examples of the required MDX for common types of user lists are in Example Dynamic User List Expressions.
2	**Expression** – Objects selected from the View Items and Functions portion of the window display in the Expression section. And, you can manually enter and edit text in the Expression portion of the window.

③	**Validate** – Click the Validate button at any point while you are building the expression. Stratum.Viewer will verify whether or not the format of your expression is valid.

Member List Window

This window is available when working with dynamic user lists. It displays the members in a list.

Note: You will see only members in the list that your role gives you the authority to use in Stratum.Viewer. The window will be blank if you are not authorized to use any of the members.
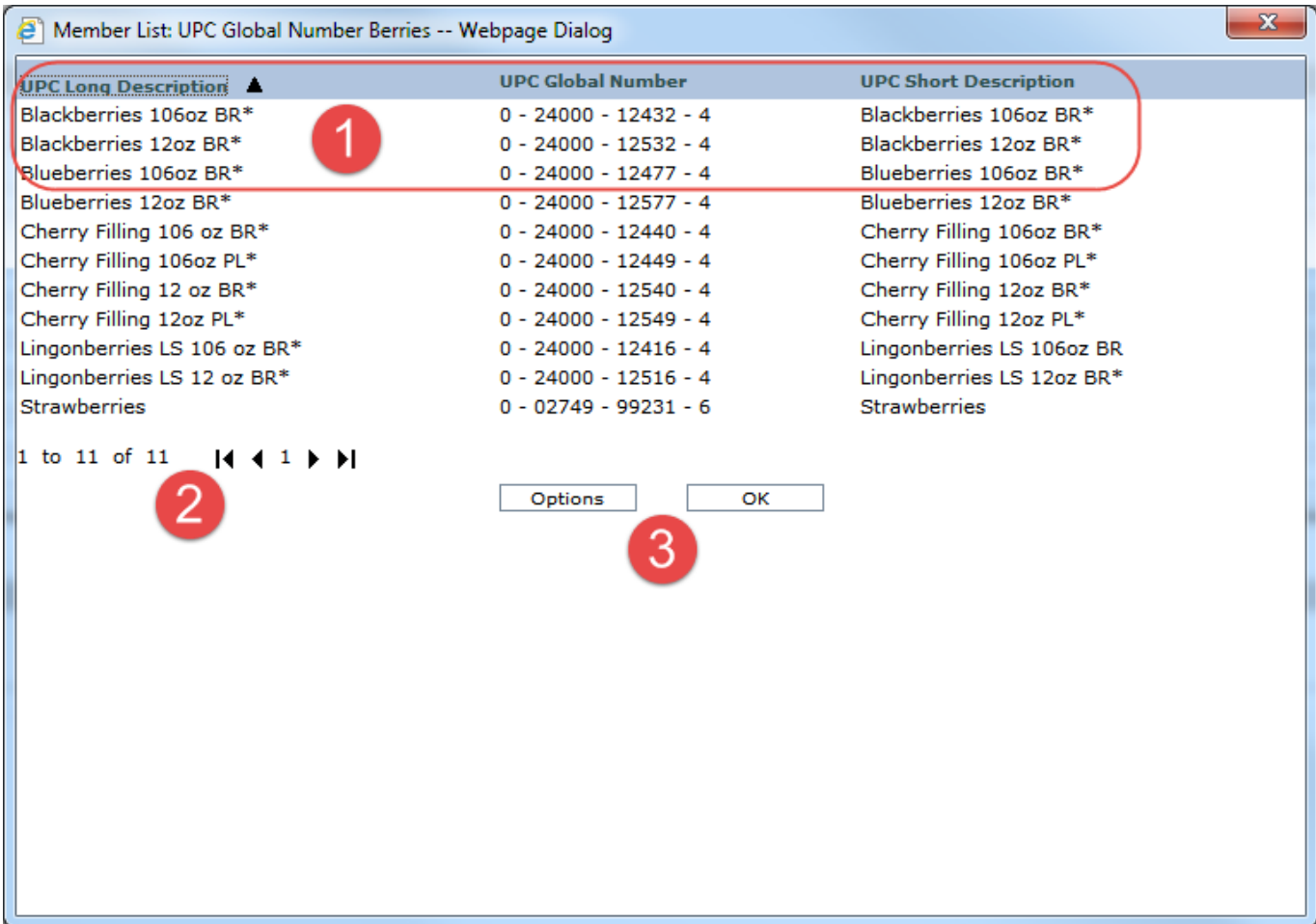
①	**Display Columns** - Sort and drag or drop columns to rearrange the window information.
②	**Paging Controls** - Use the paging arrows and links to move between pages of members. Controls are active only when there are multiple pages of members for the user list. **Note:** For all windows that display lists (views, user lists, etc), there is a single administrative setting on the Application window that controls how many items display per page in a list.
③	**Options** - Use to adjust display columns in the Member List window. See Display Options window for more information. **Note:** Columns that display by default are determined by administrator settings in the Select

	Members Options window.
	OK - Clicking OK applies the changes for the current session only in the Member List and User List Maintenance windows. Once you exit the windows, display options return to their defaults.

Save User List As Window

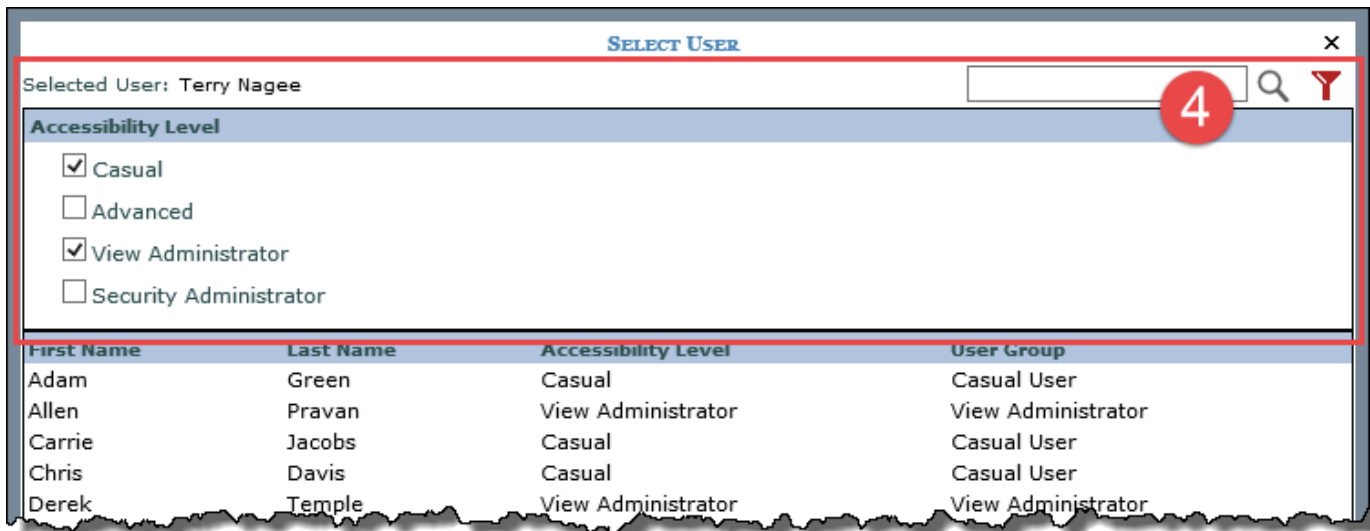|	
![1]	**Name and Description** - Specify the name for the new list. Adding a description is optional.
![2]	**Type** - Controls whether the user list will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
	Security User List - Select this checkbox to make the list a security list. The property is enabled only if you have a security administrator level of access in the application.
	Note: These properties can be adjusted from the User List Maintenance window, too, once you click Save in this window.

Select User Window

Main Window Sections

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

Search and Filter Features

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

- **Search** – Enter all or part of the name(s) of the user(s) you are searching for and then click the Search button to execute the search.

- **Filter** – Click the provided button to use the filter feature. It acts as a toggle to show or hide the filter feature. Use the Accessibility Level checkboxes to filter out users by their access level (casual, advanced, view administrator, security administrator). Only users with the levels selected in the filter feature will display in the window.

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

User List Window

Name ▲	Level	Security	Type	Mode	Last Used Date
Advanced User Partial	Ship-To Region	Yes	Global	Static	07/29/2014 08:01:44
Casual User Partial	RepBroker	Yes	Global	Static	07/29/2014 08:01:43
Comm Code 2	Commodity Code	No	Global	Static	
Commodity Code	Commodity Code	No	Personal	Static	07/22/2011 09:38:52
Customer Priority 2	Customer Priority	No	Global	Dynamic	10/04/2010 13:32:16
Customer Ship To one member	Customer Ship-To	No	Global	Dynamic	09/27/2010 08:49:17
Customer ShipTo AND	Customer Ship-To	No	Personal	Dynamic	09/28/2010 11:16:47
Customer ShipTo contains	Customer Ship-To	No	Global	Dynamic	09/28/2010 08:41:35
Customer ShipTo does not contain	Customer Ship-To	No	Global	Static	10/22/2010 14:54:09
Customer ShipTo IS	Customer Ship-To	No	Personal	Dynamic	09/23/2010 10:06:57
Customer Ship-To Sales Rep	Customer Ship-To Sales Rep	No	Global	Static	08/05/2013 16:15:16
Customer ShipTo starts with	Customer Ship-To	No	Personal	Dynamic	
DropCo Product Brands	Product Brand	No	Global	Static	
Dynamic User list for Apples	Product	Yes	Global	Dynamic	08/13/2014 11:57:08
Dynamic User List for Apples and Pears	Product	No	Global	Dynamic	09/03/2010 11:14:48
Fresh Farm Division Brands	Product Brand	No	Global	Static	08/18/2014 10:53:23
Midwest Sales Reps	RepBroker	Yes	Global	Static	
Product Family 60s	Product Family	No	Personal	Dynamic	09/08/2010 11:27:49
Product Family All Except Default Values	Product Family	No	Global	Static	04/09/2013 17:16:01
Product Image User List	Product	No	Global	Static	08/15/2014 22:47:54
Region URL	Region	No	Global	Static	10/20/2010 16:03:43
UPC Global Number Berries & Cherries	UPC Global Number	No	Personal	Dynamic	
View Administrator Partial	Product Family	Yes	Global	Static	07/29/2014 08:01:44
Year Months	Year	No	Global	Dynamic	07/28/2014 13:01:07

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1	**Toolbar -**
	• **New** - Click to open a blank User List Maintenance window and set up a new list.
	• **Edit** - Select a list then click Edit to open the list for editing in the User List Maintenance window. Another option is to double-click a list. If multiple lists are selected when you click Edit, the first selected list will open for editing.
	• **Delete** - Select one or more lists then click Delete to delete them. You can use Ctrl+Click and Shift+Click when selecting more than one user list. You will be prompted to confirm the deletion.
	• **Display Options** - Click to open the Display Options window. Use it to control which columns of information display in the window. Changes made apply to the current session only in the User List and User List Maintenance windows.
	• **Help** - Click to open help that is specific to working with user lists.
2	**Display Columns** - Sort and drag or drop columns to rearrange the window information. You can show more columns or hide columns by clicking the Display Options button in the toolbar. See button description above.
3	**Selecting Lists** - You can select one or more lists at a time. Double-click a single list to open it for editing. Or, select a single list and click Edit. If you have multiple lists selected when you click Edit, only the first selected list will open for editing. When deleting, you can select one or more lists at a

	time and then click Delete.
④	**Paging Controls** - Use the paging arrows and links to move between pages of lists. Controls are active only when there are multiple pages of lists.
	Note: For all windows that display lists (views, user lists, etc), there is a single administrative setting on the Application window that controls how many items display per page in a list.

User List Maintenance Window

Static User Lists

①	**Toolbar** -
	• **New** - Click to clear the User List Maintenance window and set up a new list.
	• **Save** and **Save As** - Click the respective buttons to save the active list or create a new list from the active list. The Save button will be disabled in certain cases, such as for advanced users who are viewing properties of global lists. They cannot save changes to global lists, but can use the Save As button to create a new list from that currently displayed list.
	• **Delete** - Click to delete the list. You will be prompted to confirm the deletion.

	• **Exit** ← - Click to exit this window and return to the [User List window](#). • **Help** ? - Click to open help that is specific to working with user lists.
2	**Basic General Properties** - Use this section of the window to specify the name and description for the list. Description is optional. Other properties are for controlling whether the list will be global or personal and whether or not the list will be a security user list. • **Type** - Controls whether the user list will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal. • **Security User List** - Administrators can designate any list as a security list by selecting the Security User List checkbox. The list will be available to administrators for filtering purposes when they set up roles in addition to being available for filtering views.
3	**Static User List General Properties** - • **Mode** - Select the Static option to set up a static user list. After making selections for the other properties below, you can then click the Members button and choose the members for the list. • **Server and Database** - The Server and Database drop-down lists will default to the server and database associated with your user profile's role. If you are a security administrator and there are multiple databases registered with Stratum.Viewer, you will need to select which server and database to use for the list. Once you save a new user list, these drop-down lists will be disabled. You can still edit other properties such as the name, description, members, etc. • **Dimension, Hierarchy, Level** - Use these three drop-down lists to determine the level on which to base the list. If you want to set up a list on a level from a time hierarchy, select Time from the Dimension drop-down list. Once you save a new user list, these drop-down lists will be disabled. You can still edit other properties such as the name, description, members, etc.

4	**Attributes** - This section provides background information about the list. Below the section is a Members button for use in selecting or viewing the members for the static list.
	
	• **Member Count** - The number of members included in the user list. The count will be updated after you select members for a new list or edit members for an existing list.
	• **Date and Owner Properties** - These properties provide historical information about the list.
	  ○ **Created Date** - The date and time when the list was created. The property will be populated after you save a new list.
	  ○ **Owner** – The user who owns the list. This defaults to the user who is creating the list. After a list has been created and saved, the Owner can be changed to another user if needed by administrators. The Browse button ⋯ next to the property is used to access to the [Select User window](#), which allows administrators to select the user who will be the list owner.
	  ○ **Last Updated Date** - The date and time when the list was last edited. Initially, this property will be the same as the Created Date. If the list is edited in the future, the property will be updated to reflect that date and time.
	  ○ **Last Used Date and Last Used By** - The date and time when the list was last used for filtering in the application and the name of who last used it. There may be times when the Last Used By is blank even though a Last Used Date displays -- this can occur when a user who previously used the view for filtering has since had their user profile disabled or removed.
	• **Source** – The text "Viewer" will display for lists set up in Stratum.Viewer. The text "Stratum" will display for lists that were imported from Stratum.Planner via Stratum.Connector for Viewer.
	• **Members -** Click to access the Select or Advanced Select Members window. The window

	opens for the level that you selected from the Level drop-down list. You can choose members for a new static list from the window or use the window to edit members for an existing list.

Dynamic User Lists

	Toolbar -
1	• **New** - Click to clear the User List Maintenance window and set up a new list.
	• **Save** **and Save As** - Click the respective buttons to save the active list or create a new list from the active list. When you click save, the expression for the dynamic user list will be executed, and the list will be populated with members that meet its expression criteria. The Save button will be disabled in certain cases, such as for advanced users who are viewing properties of global lists. They cannot save changes to global lists, but can use the Save As button to create a new list from that currently displayed list.
	• **Process** **-** This button will be enabled after you do an initial save of a new list. Then you can use the button for the following purposes.
	• Fine tune the expression as you edit the list. If you edit the expression and want to see which members meet the expression criteria, click Process. Then click the Members button to see a list of those members. If needed, adjust the expression further until the

members returned fit your analysis needs.

- Update the list on-the-fly with the current members that meet the expression criteria. You will need to do that on a regular basis if the Batch Process checkbox is disabled for the list. When the checkbox is enabled, the list definition will be processed and updated as part of the Stratum.Connector for Viewer Analysis Services database process. See item 3 below.

- **Delete** ⊗ - Click to delete the list. You will be prompted to confirm the deletion.

- **Exit** ↩ - Click to exit this window and return to the User List window.

- **Help** ❓ - Click to open help that is specific to working with user lists.

Basic General Properties - Use this section of the window to specify the name and description for the list. Description is optional. Other properties are for controlling whether the list will be global or personal and whether or not the list will be a security user list.

- **Type** - Controls whether the user list will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
- **Security User List** - Administrators can designate any list as a security list by selecting the Security User List checkbox. The list will be available to administrators for filtering purposes when they set up roles in addition to being available for filtering views.

Dynamic User List General Properties -

- **Mode** - Select the Dynamic option to set up a dynamic user list. After making that selection, the window is refreshed with properties unique to that type of list including the Run button, Expression field, and Batch Process checkbox.
- **Server and Database** - The Server and Database drop-down lists will default to the server and database associated with your user profile's role. If you are a security administrator and there are multiple databases registered with Stratum.Viewer, you will need to select which server and database to use for the list. Once you save a new user list, these drop-down lists will be disabled. You can still edit other properties such as the name, description, members, etc.
- **Dimension, Hierarchy, Level** - Use these three drop-down lists to determine the level on which to base the list. If you want to set up a list on a level from a time hierarchy, select Time from the Dimension drop-down list. Once you save a new user list, these drop-down lists will be disabled. You can still edit other properties such as the name, description, members, etc.
- **Expression and Browse** ⬚ - Click the button to access to the Expression window and set up the expression for determining the list members. See also Example Dynamic User List Expressions. After you set up the expression, it will display in the read-only Expression field.
- **Batch Process** - Select this checkbox if you want the list definition to be updated during each process of the Stratum.Connector for Viewer Analysis Services database. The list expression will be evaluated during the process and populated with the latest members fitting the expression criteria. All lists with a batch designation will be evaluated and updated in this manner. You can still click the Process button at anytime to execute the filter expression and update the list on-the-fly. If you de-select Batch Process, this list will not be updated as part of the Stratum.Connector for Viewer update process.

Attributes - This section provides background information about the list. Below that section is a Members button for use in viewing the members for the dynamic user list.

- **Member Count** - The number of members included in the user list. The count will be updated as soon as you save the new list or anytime you click the Process button after that initial save. Also, if you enabled the Batch Process option, the count will be updated after each

process of the Stratum.Connector for Viewer Analysis services database.

- **Date and Owner Properties** - These properties provide historical information about the list.
  - **Created Date** - The date and time when the list was created. The property will be populated after you save a new list.
  - **Owner** – The user who owns the list. This defaults to the user who is creating the list. After a list has been created and saved, the Owner can be changed to another user if needed by administrators. The Browse button [...] next to the property is used to access to the Select User window, which allows administrators to select the user who will be the list owner.
  - **Last Updated Date** - The date and time when the list was last edited. Initially, this property will be the same as the Created Date. If the list is edited in the future, the property will be updated to reflect that date and time.
  - **Last Used Date and Last Used By** - The date and time when the list was last used for filtering in the application and the name of who last used it. There may be times when the Last Used By is blank even though a Last Used Date displays -- this can occur when a user who previously used the view for filtering has since had their user profile disabled or removed.
- **Source** – The text "Viewer" will display for lists set up in Stratum.Viewer. The text "Stratum" will display for lists that were imported from Stratum.Planner via Stratum.Connector for Viewer.
- **Members -** Click to access the Member List Window. The window displays the current members in the dynamic user list.

Advanced Concepts

Change the Owner of a User List

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

1. Click the User List option in the Admin Utilities view group.

2. From the User List window, click the name of the user list then click Edit [icon] (or double-click the list name).

3. In the Attributes section of the User List Maintenance window, click the Browse button [...] for the Owner property.

4. In the Select User window, click the name of the new Owner for the view, and then click OK in that window. You can narrow down the users that display for selection in the window using the search [icon] and/or filter [icon] tools.

5. Click Save [icon].

Edit the Information Displayed in the User and Member List Windows

For the User List Window

1. In the User List window, click Display Options ⌖.

2. Select or de-select display columns in the Display Options window to change which ones display.

3. Click OK.

For a Dynamic User List's Member List Window

1. In the Member List window, click Options.

2. Select or de-select display columns in the Display Options window to change which ones display.

3. Click OK.

Factors Influencing Default Settings in Filtering Windows

The default state of the following windows depends on how you accessed the window, either from a view or from an administrative page such as Role Maintenance or User List Maintenance.

- Select User List Filter window
- Select Members, Advanced Select Members, and Paste Members windows

Windows Accessed from Views or View Prompt Window

When filtering windows are opened from a view, the display columns that display by default are the values and/or attribute relationships showing in the grid. The Search By drop-down lists in the Select and Advanced Select Members windows depend on administrator settings in the Select Members Options window. If an attribute relationship was selected in those settings for the applicable level, then Search By will default to that attribute relationship. If System Defined was selected in those administrative settings for the level, then searches will default to the level's display text in the view.

The Buyer level in this view has three attribute relationships available for use in the view, and two of them are showing in the view. The Buyer Short Description is the display text, and the Buyer Phone Number also is on display. Those two attribute relationships are the default display columns in the filtering windows. The Buyer Short Description displays first and is the default selection for Search By. This is the default because the administrative Select Members Options settings for that level were set to System Defined and because that attribute relationship is the display text in the view.

When running views with parameters, a Display Text property for parameters can be used to customize what users see when they access filtering windows from the View Prompt window. When the property is set to View, the filtering window behaves the same as described in the prior section. When the property is set to an attribute of the level, the defaults in the filtering windows will use that attribute when windows are accessed from the View Prompt window.

Note: Display Text settings for a parameter only take effect if the Search By setting for a level in the Select Members Options administrator window are set to System Defined. If an attribute relationship is selected for a level's Search By setting in Select Members Options, then Search By will default to that administrator-specified attribute relationship.

The following View includes a Select Members parameter on the UPC Global Number level. The parameter Display Text is set to UPC Long Description. Information displayed in the grid for the level are UPC Commodity Code, ABC Classification, and Short Description. The Search By setting in Select Members Options for the level is set to System Defined. When users access the Select and Advanced Select Members from the View Prompt window to make their UPC selections, the Search By and first display column will default to the UPC Long Description, according to the parameter Display Text setting.

View Name: *UPC Daily Sales by Ship-To Region*
View Filter

			E. US		S. US		MidW U$	
		Ship-To Region >>	USA		USA		USA	
		SRgn Country						
▼ UPC Global Number	UPC ABC Classification	UPC Short Description	Daily Sales Amount Jan 14 to Sep 14	Daily Sales Units Jan 14 to Sep 14	Daily Sales Amount Jan 14 to Sep 14	Daily Sales Units Jan 14 to Sep 14	Daily Sale Amount Jan 14 to S 14	
0 - 39484 - 92837 - 1	B	Apples Red Delicious	$9,574,364	6,905	$13,700,369	10,271	$10,848,3	
0 - 24000 - 12430 - 4	A	Applesauce 106oz BR*	$6,421,048	1,546	$5,651,066	2,346	$6,560,6	
0 - 24000 - 12431 - 4	A	Applesauce 106oz PL*	$13,563,955	1,797	$19,136,315	5,825	$17,732,0	
0 - 24000 - 12530 - 4	A	Applesauce 12oz BR*	$6,062,108	1,478	$3,188,540	676	$7,927,1	
0 - 24000 - 12531 - 4	A	Applesauce 12oz PL*	$18,921,470	8,768	$8,790,517	3,887	$27,569,8	
0 - 02749 - 25408 - 6	C	Asparagus	$20,400,226	2,871	$19,747,022	5,475	$25,778,2	
0 - 79453 - 02938 - 9	A	Baby Carrots	$7,456,195	4,426	$7,923,022	2,177	$8,523,2	
0 - 39484 - 24300 - 1	B	Bananas	$2,613,118	1,674	$3,187,710	1,273	$3,500,8	
0 - 24000 - 12432 - 4	A	Blackberries 106oz BR*	$2,753,608	311	$2,990,502	395		
0 - 24000 - 12532 - 4	A	Blackberries 12oz BR*	$3,267,656	975	$1,266,028	373	$4,144,	
0 - 24000 - 12477 - 4	B	Blueberries 106oz BR*	$1,304,435	126	$1,910,835	288	$1,715,	
0 - 24000 - 12577 - 4	B	Blueberries 12oz BR*	$2,089,920	293	$897,349	86	$2,777,	
0 - 24000 - 12456 - 4	C	Blueberry Filling 106oz B	$2,330,422	737	$5,375,531	1,896		
0 - 24000 - 12450 - 4	C	Blueberry Filling 106oz P			$548,892	198		

View Explorer

- ▲ UPC Daily Sales by Ship-To Region
  - ▲ Parameter Groups
    - ▷ • ShipTo Region Parameters
    - ▲ • UPC Parameters
      - MemberParameter
  - ▲ Grid
    - ▷ Rows
    - ▷ Columns
    - View Filter
    - ▷ Measure Items
    - Presentation
  - Charts

Properties - MemberParameter

Name	MemberParameter
Type	Select Members
Prompt	Choose UPC's to Review
Default Value	
Display Text	UPC Long Description

SELECT MEMBERS: UPC GLOBAL NUMBER

Search For: [ ] Search By: [UPC Long Description] [Contains] Find Stop

UPC Long Description ▲	UPC ABC Classification	UPC Short Descrip
§	§	§
?	?	?
Apple Filling 106oz BR*	B	Apple Filling 106c
Apple Filling 106oz PL*	A	Apple Filling 106c
Apple Filling 12oz BR*	B	Apple Filling 12oz
Apple Filling 12oz PL*	A	Apple Filling 12oz
Apples Red Delicious	B	Apples Red Delicio
Applesauce 106oz BR*	A	Applesauce 106oz E
Applesauce 106oz PL*	A	Applesauce 106oz F
Applesauce 12oz BR*	A	Applesauce 12oz BF
Applesauce 12oz PL*	A	Applesauce 12oz PI
Asparagus	C	Asparagus
Baby Carrots	A	Baby Carrots
Bananas	B	Bananas
Blackberries 106oz BR*	A	Blackberries 106oz
Blackberries 12oz BR*	A	Blackberries 12oz
Blueberries 106oz BR*	B	Blueberries 106oz
Blueberries 12oz BR*	B	Blueberries 12oz E
Blueberry Filling 106oz BR*	C	Blueberry Filling
Blueberry Filling 106oz PL*	C	Blueberry Filling
Blueberry Filling 12oz BR*	C	Blueberry Filling
Blueberry Filling 12oz PL*	C	Blueberry Filling
Cherries, Bing	B	Cherries, Bing
Cherry Filling 106 oz BR*	A	Cherry Filling 106
Cherry Filling 106oz PL*	A	Cherry Filling 106

Select Advanced Options OK Cancel Help

Windows Accessed from Administrative Pages

The default display columns and Search By are determined by administrator settings when filtering windows are accessed from administrative pages. Administrators use a Select Members Options window to choose the defaults for each level.

Here is the Select Members window for the Buyer level shown in the first example. The window was accessed from the User List Maintenance window while setting up a user list. Based on administrator settings, the default Search By is value (Buyer) and the default display columns are value, Buyer Short Description, and Buyer Long Description.
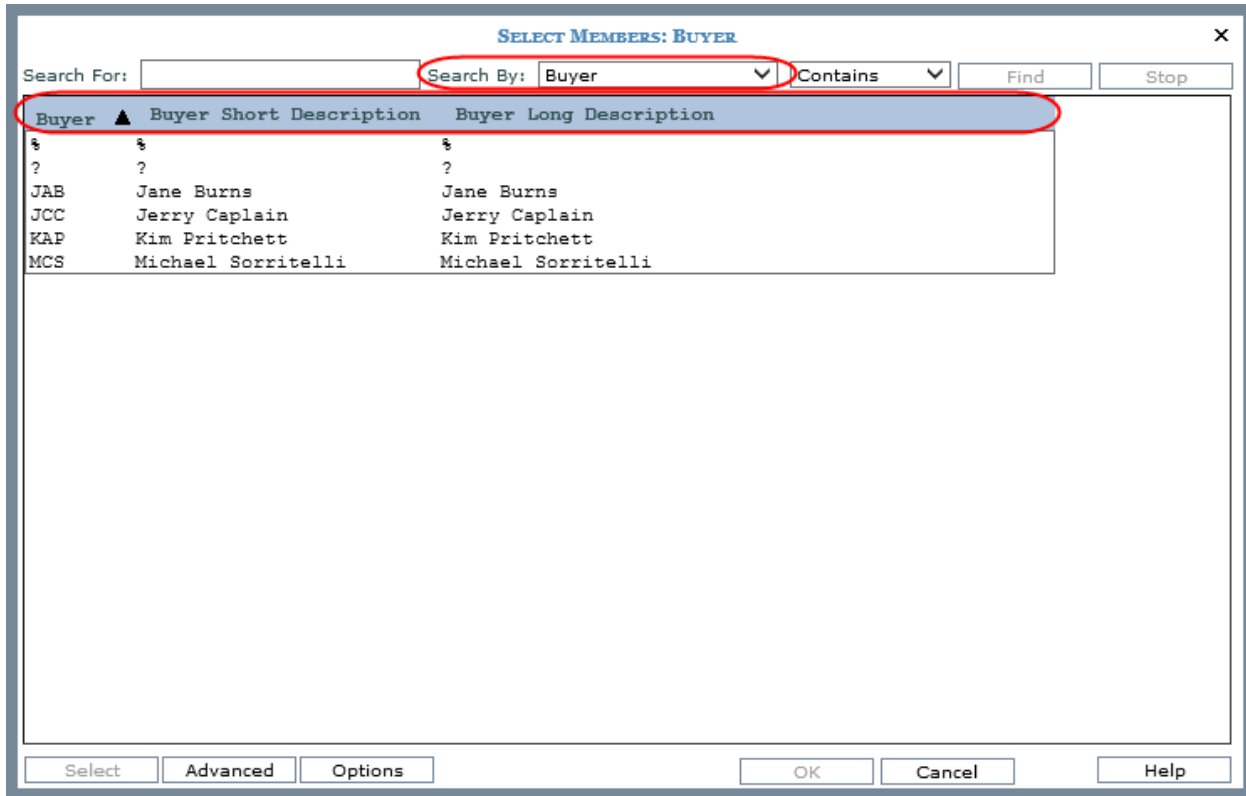
Impact of Roles on What Data You can Access in Stratum.Viewer

Security administrators set up roles for the user profiles or user profile groups of users who have a casual, advanced, or view administrator level of access to the application. Roles determine what data you will see when you run views, user filtering windows, and insert or edit measure items. You can be given full or partial access to dimensions which will impact the dimension members that you can see in views and filtering windows. Administrators can give you Read access to some or all measures, which impacts the measure items that you will see in your views and measure item windows. Your administrator also can give you Update access to measures for the purpose of doing planning updates in views.

Dimensions

Here is a view for someone whose role only permits access to Product Family 30. Only sales for Product Family 30 will display in the view for that user.

Here is the same view run by a user with full access to the Product Family dimension. The view displays data for all Product Families.

Product Family	PFam Long Description	AS Sales Amount Q3 2014 to Q3 2014	AS Sales Units Q3 2014 to Q3 2014	AS Return Units Q3 2014 to Q3 2014
30	Frozen Entrée	$76,402,409	1,073,723	
31	Frozen Individual Dinner	$73,639,530	1,075,746	
50	Tender Vegetables	$104,864,201	2,442,620	(33,932)
51	Hardy Vegetables	$68,358,260	1,906,343	(14,198)
60	Fruit Fillings	$107,343,286	2,995,943	(25,270)
61	Applesauce	$113,169,665	2,974,860	(21,667)
62	Frozen Juice	$41,129,639	775,323	
64	Specialty Canned Fruit	$104,947,986	2,325,030	(14,986)
65	Fruit Cocktail	$132,563,642	3,292,466	(25,270)
66	Peaches	$177,024,731	4,387,291	(22,622)
67	Pears	$89,325,252	2,173,969	(12,719)
68	Pineapple	$93,811,943	2,718,289	(20,617)
70	Fresh Pork	$66,720,662	1,305,980	(12,623)
71	Fresh Beef	$59,170,835	1,290,657	(22,144)
80	Tender Fruits	$76,370,290	1,581,023	(162,885)
81	Hardy Fruits	$62,761,118	2,131,608	(28,301)
Grand Total		$1,447,603,449	34,450,871	(417,236)

Roles also impact the data that displays in the Select Members, Advanced Select Members, Paste Members, and Select User List Filter windows. Here is what the Select Members window looks like for the user with access only to Product Family 30.

Here is what the window looks like for a user with full access to the Product Family dimension.
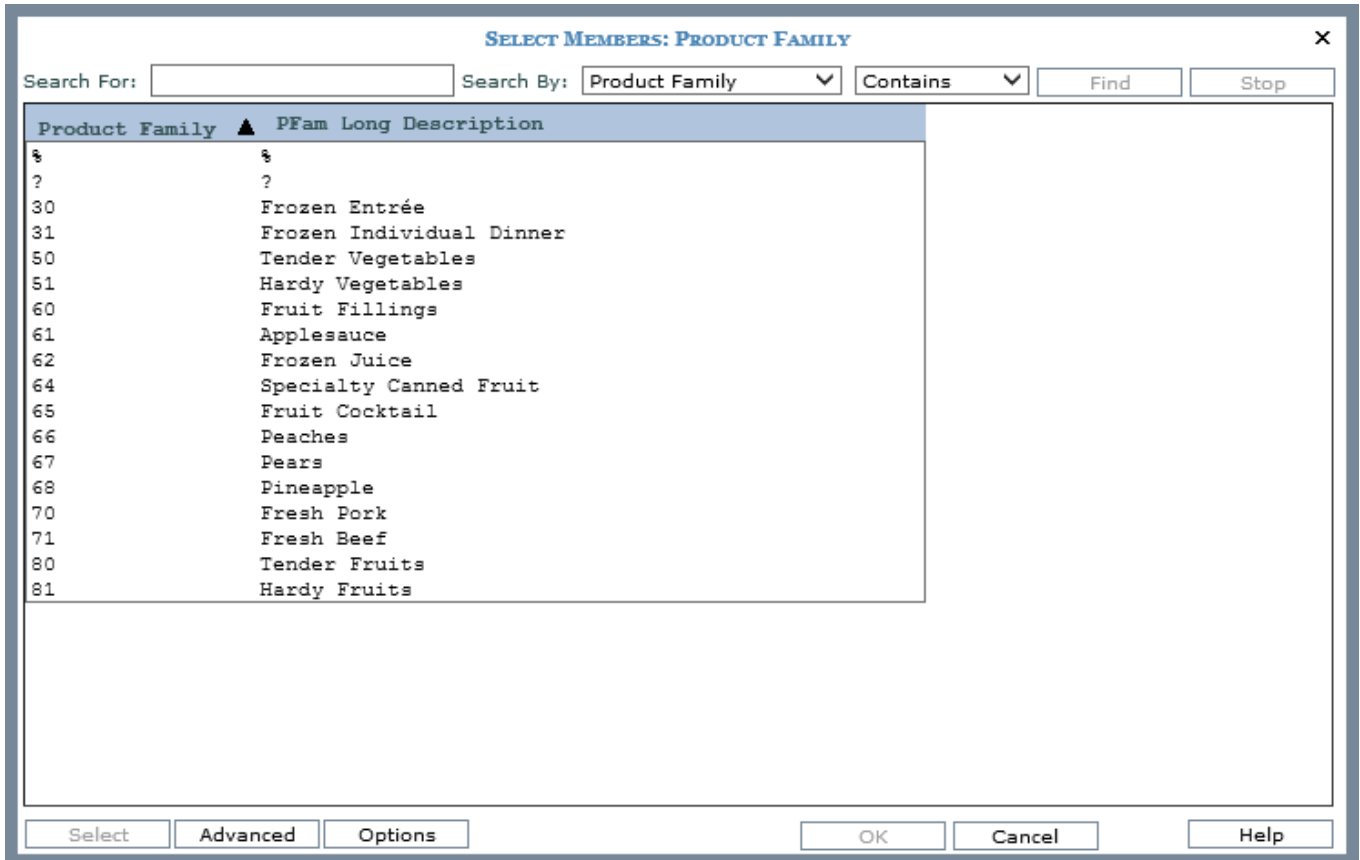
Next, consider a user list that contains three Product Family members including 30. The user with access only to Product Family 30 will see that member only when they click Show Details for the list.

All three list members display when the list members are viewed by a user with full access to the Product Family dimension.

Measures

A role controls which measures users are able to see. Below is a view defined to display two measure items based on some Actual Sales measures and two based on Budget measures. The user running the view has permission to see all Actual Sales measures but does not have permissions to any Budget measures. That means the view will only return the measure items based on Actual Sales for this user.

View Name: *Current Yr Sales and Budget by Family*
View Filter

1 to 10 of 10 · 1 to 2 of 2

Year >>	2014	
Product Family	Actual Sales Amount	Actual Sales Units
30	$150,730,578	1,981,468
50	$151,009,565	3,936,603
51	$43,478,041	1,312,546
60	$189,747,299	4,798,985
61	$249,530,401	5,964,705
64	$98,471,013	1,931,934
66	$50,712,234	1,376,167
68	$36,335,803	1,058,926
71	$91,162,973	1,288,539
Grand Total	$1,061,177,906	23,649,873

Here is the same view run by a user with access to all Actual Sales and Budget measures. That user has access to all measures in the view.

**View Name:** *Current Yr Sales and Budget by Family*
View Filter

1 to 10 of 10 · 1 to 4 of 4

Year >>	2014			
Product Family	Actual Sales Amount	Budget Amount	Actual Sales Units	Budget Units
30	$150,730,578	$202,186,419	1,981,468	2,022,056
50	$264,156,520	$317,777,286	5,811,765	5,584,174
51	$171,774,479	$206,418,890	4,506,336	4,334,357
60	$290,938,489	$368,768,693	7,288,046	7,583,477
61	$249,530,401	$285,145,726	5,964,705	5,388,661
64	$255,649,144	$297,432,454	5,039,548	4,694,518
66	$426,948,999	$517,656,667	9,350,728	9,031,445
68	$260,371,059	$313,945,578	6,710,988	6,580,443
71	$151,641,309	$182,685,848	2,852,499	2,782,626
Grand Total	$2,221,740,978	$2,692,017,560	49,506,083	48,001,757

Also note, the user with the role restrictions in this example will not see the measures in question in the Insert and Edit Measure Items windows. Here is the Insert Measure Item window for that user.
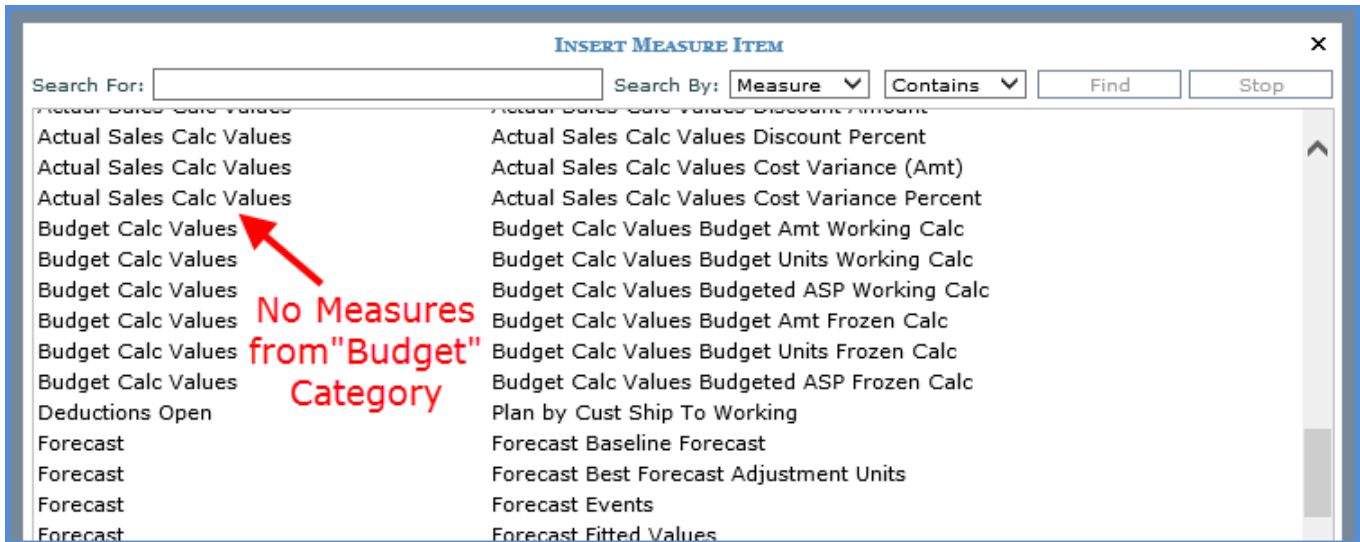
All Budget measures, both "Working" and "Frozen," display when the other user with full access uses the window.
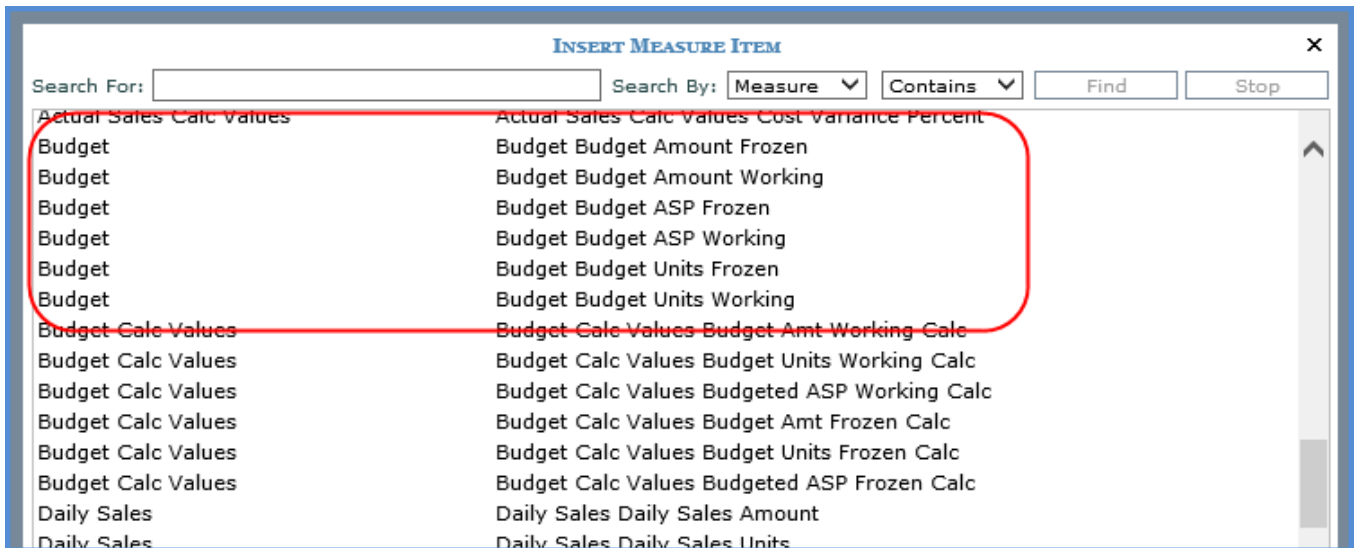
Measure Items Created from Stratum.Planner Calculated Values

Regardless of your role, all Stratum.Planner calculated values that are part of your environment will display in the Insert and Edit Measure items windows.

Notice that six Budget Calc Values showed for both users mentioned in our prior example. If a calculated value requires a regular measure to which you don't have access, then #ERR will be returned by the calculation in the Stratum.Viewer grid. For example, the marked measure item below is a calculation that requires data from the Budget Budget Amount Frozen and Budget Budget Units Frozen measures. A user with a role that permits him to see those measures will be able to see data returned in the view for the measure item.

View Name: *Avg vs Budgeted ASP Current Month*
View Filter

ABC Classification Code	Product	Actual Sales Calc Values Sales Avg Selling Price Sep 2014 to Sep 2014	Budget Calc Values Budgeted ASP Frozen Sep 2014 to Sep 2014
A	Applesauce 12oz BR* 0A	$36.27	$40.58
	Pear Slcs LS 12 oz BR* 0A		$41.46
	Pear Hlvs LS 12oz PL* 0A		$35.13
	Applesauce 12oz PL* 0A	$31.64	
	Apple Filling 12oz PL* 0A		$32.25
	Applesauce 106oz BR* 0A	$62.10	$69.21
	Applesauce 106oz PL* 0A	$51.13	$57.24
	Apple Filling 106oz PL* 0A	$50.32	$56.10
	Applesauce 12oz BR* 0B	$36.27	$40.58
	Pear Slcs LS 12 oz BR* 0B		$41.46
	Pear Hlvs LS 12oz PL* 0B		$35.13
	Applesauce 12oz PL* 0B	$31.64	
	Apple Filling 12oz PL* 0B		$32.25
	Applesauce 106oz BR* 0B	$62.10	$69.21
	Applesauce 106oz PL* 0B	$51.13	$57.24
	Apple Filling 106oz PL* 0B	$50.32	$56.10
	Applesauce 12oz BR* 0C	$36.27	$40.58

When a user who is not permitted to access Budget Budget Amount Frozen or Budget Budget Units Frozen runs the same view, that user sees results of #ERR.

View Name: *Avg vs Budgeted ASP Current Month*
View Filter

ABC Classification Code	▼ Product	Actual Sales Calc Values Sales Avg Selling Price Sep 2014 to Sep 2014	Budget Calc Values Budgeted ASP Frozen Sep 2014 to Sep 2014
A	Pear Hlvs LS 12 oz BR* 0A		#ERR
	Applesauce 12oz BR* 0A	$36.27	#ERR
	Pear Slcs LS 12 oz BR* 0A		#ERR
	Pear 6oz LnchPk LS 0A		#ERR
	Escalloped Apples 12 oz BR* 0A		#ERR
	Apple Filling 12oz BR* 0A		#ERR
	Pear Hlvs LS 12oz PL* 0A		#ERR
	Applesauce 12oz PL* 0A	$31.64	#ERR
	Apple Filling 12oz PL* 0A		#ERR
	Pear Hlvs LS 106 oz BR* 0A		#ERR
	Applesauce 106oz BR* 0A	$62.10	#ERR
	Escalloped Apples 106 oz BR* 0A		#ERR
	Apple Filling 106oz BR* 0A		#ERR
	Pear Hlvs LS 106oz PL* 0A		#ERR
	Applesauce 106oz PL* 0A	$51.13	#ERR
	Apple Filling 106oz PL* 0A	$50.32	#ERR
	Pear Hlvs LS 12 oz BR* 0B		#ERR
	Applesauce 12oz BR* 0B	$36.27	#ERR

When to Create Security User Lists

Security administrators should create a security user list when they want to use a user list to control the members of a dimension that a user or group of users are authorized to see. The lists can be used to give partial access to a role's dimension attributes. Only lists that have a security designation will show up when the Select User List Filter window is accessed from the Role Maintenance window.
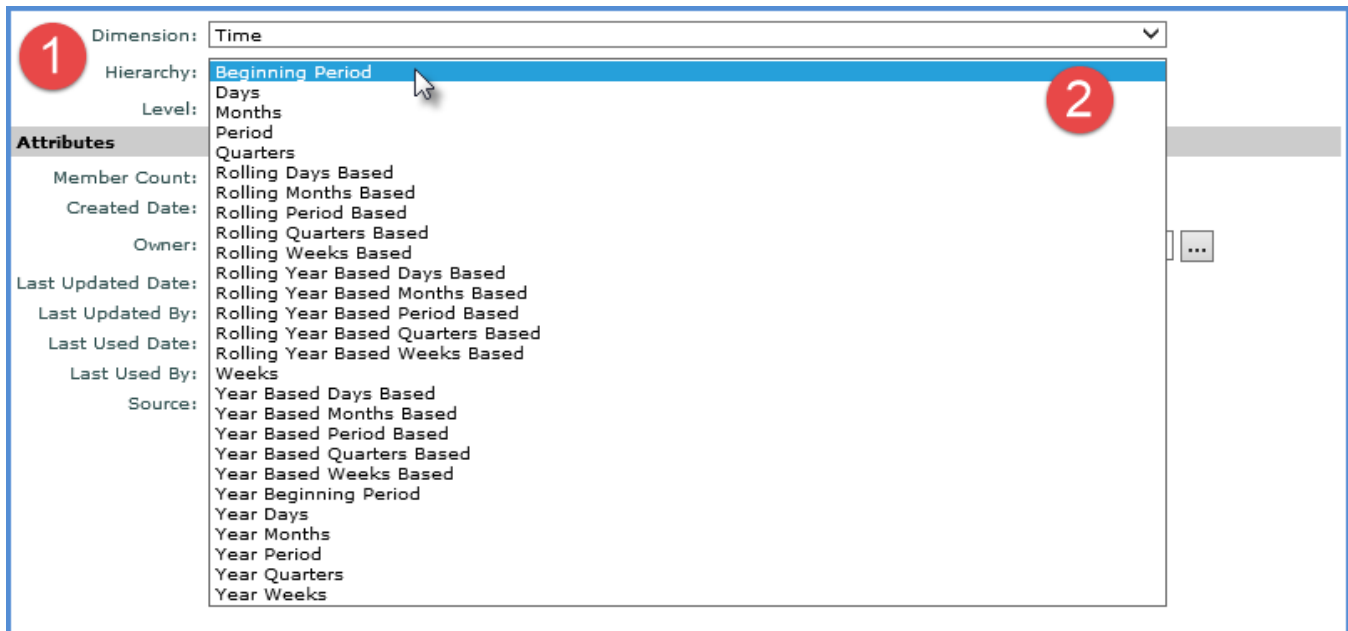
Where are the Time Hierarchies in the User List Maintenance Page?

There is a single Time dimension listed in the Dimension drop-down list (1). Select that to populate the Hierarchy drop-down list with time hierarchies (2).

Why can't I Delete a User List?

A user list cannot be deleted if it is currently used to filter objects in a view, filter a role's dimension attributes, or selected as an action parameter for an action. The filter would need to be removed from the view, role, or action in order to delete the list.

Why can't I Save Changes to a User List?

If you are an advanced user viewing a global user list, then you cannot save changes to that list. You must create a new list from that list if you want to save that state of the list as one of your personal lists. Click Save As in the User List Maintenance window, and set up basic properties for the new list in the Save User List As window.

Note: Only view and security administrators can save changes to global user lists. They can also save changes to lists owned by other users.

Attribute Relationship

Attribute relationships provide supplementary, descriptive information about levels. For example, a Customer level may have members (Customers) with attribute relationships such as address, contact person, long description, phone number, and region.

Attribute relationships can be used in several ways, such as displayed on rows and columns of views, used for filtering purposes, and used to build user list expressions. They are also used as display columns and for searching purposes in the Select and Advanced Select Members windows.

Dimension

There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Dimensions contain at least one hierarchy, which in turn contain at least one level, which in turn contain members. You can see an example of this structure in view explorer.

Dimension with Single Hierarchy

In this example, there is a Product Family hierarchy ( ) with a Product Family level ( ) in the rows for the grid. The hierarchy belongs to a Product Family dimension, which you can see when you access the Properties window for the hierarchy.
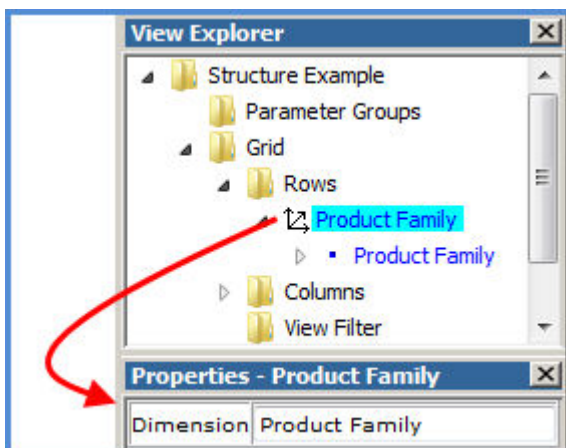
Dimension with Multiple Hierarchies

There are two time hierarchies in this example, and both belong to a Time dimension. The Year Months hierarchy ( ) has Year (") and Months (") levels. The Year Weeks hierarchy ( ) has Year (") and Weeks (") levels.
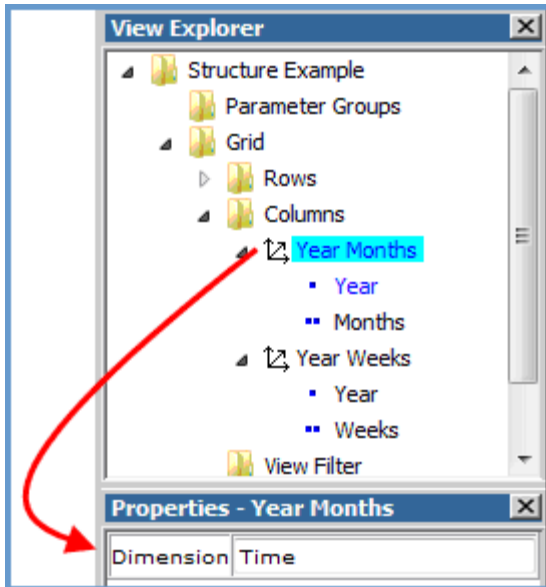
Display Column

Display columns provide descriptive information about objects displayed in Stratum.Viewer windows such as the View List and Select User List Filter windows. The display columns available vary by window and object type. Examples of display columns are the date a user list was created, an attribute relationship for a level member, and the owner of a view. You can determine which display columns show while using the Select Members, Advanced Select Members, User List, Member List, and Conditional Format windows.

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.
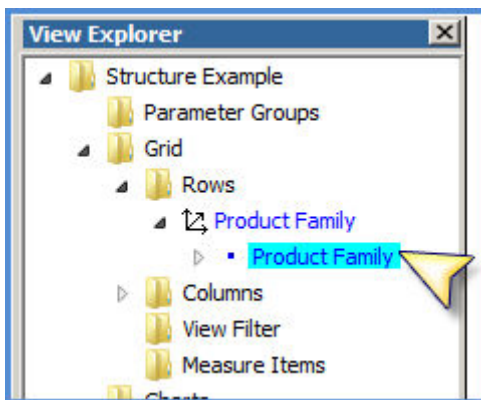
Hierarchy

There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Hierarchies belong to dimensions and contain at least one level, which in turn contain members. You can see an example of this structure in view explorer. In the following example, there is a Product Family hierarchy (⤴) with a Product Family level (▪) in the rows. The hierarchy belongs to a Product Family dimension, which you can see when you access the Properties window for the hierarchy.
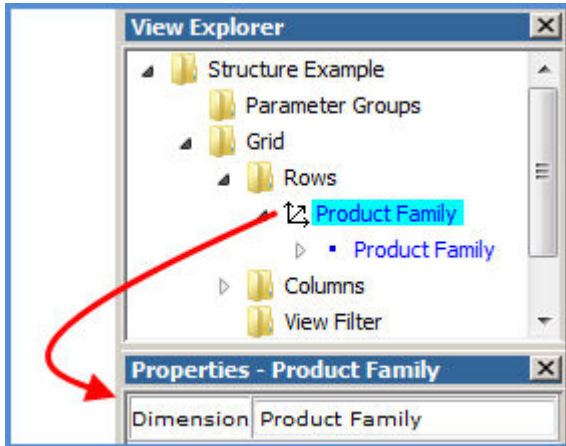
Level

There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Levels belong to hierarchies and contain members. You can see an example of this structure in view explorer. In the following example, there is a Product Family level (▪) that belongs to a Product Family hierarchy (⤴) in the rows.

Levels can be used in several ways, such as displayed on rows and columns of views, used for filtering purposes, and used to build user list expressions.

Member

There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Members belong to levels and represent the items of information for each level. You can see an example of members in the rows or columns of your views. Members can be displayed by their value or an attribute relationship. In the following example, there is a Product Family level on rows and five of its members are displayed by value. The PFam Long Description attribute relationship also displays for each member.

Members can be used in several ways, such as for filtering or sorting purposes in views and for building user list expressions.

Product Family	PFam Long Description	Daily Sales Amount Jan 2014 to Sep 2014	Daily Sales Units Jan 2014 to Sep 2014
50	Tender Vegetables	$1,986,048	91,768
60	Fruit Fillings	$2,141,722	107,390
64	Specialty Canned Fruit	$1,505,100	56,595
65	Fruit Cocktail	$2,008,747	83,519
66	Peaches	$2,827,284	123,190
Grand Total		$10,468,899	462,461

View Name: Daily Sales by Product Family
View Filter