



Working with User Profiles and User Profile Groups

Stratum.Viewer 6

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Getting Started

Access to User Profile & User Profile Group Administration

Your user profile level controls what you can do with user profiles and user profile groups.

User Profile Level	User Profiles			User Profile Groups		
	Add	Edit	Disable or Delete	Add	Edit	Delete
Casual						
Advanced						
View Administrator				x	x	x
Security Administrator	x	x	x	x	x	x

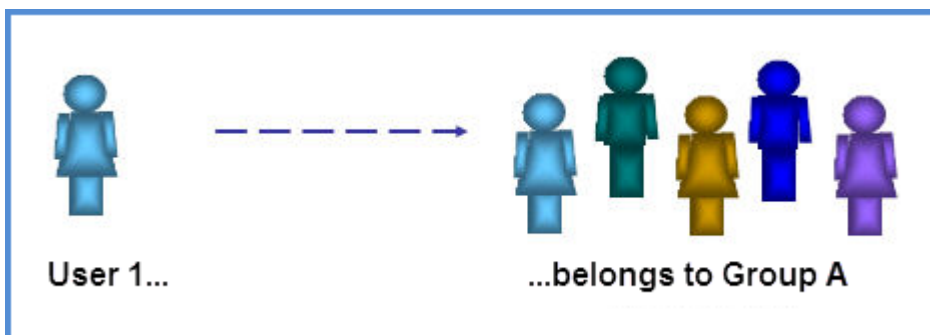
Introduction to User Profiles & User Profile Groups

Administrators use user profiles and user profile groups in combination with roles to give users access to Stratum.Viewer.

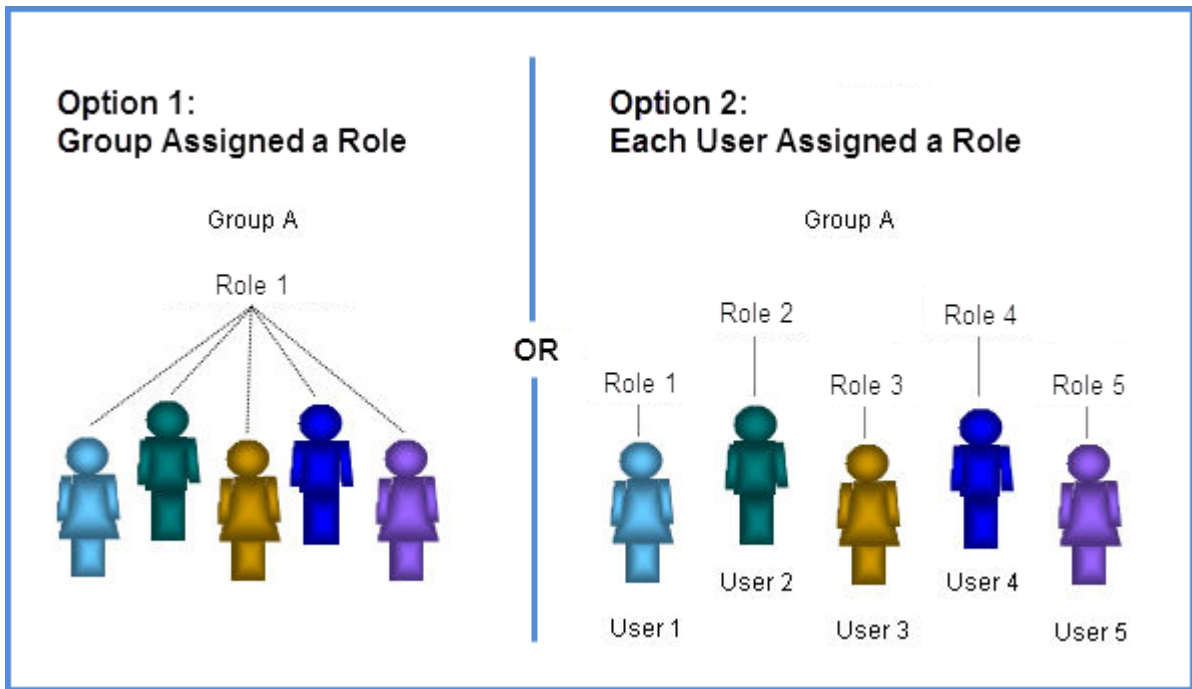
User profiles control which features and functions users can access in the application. The levels of access are casual, advanced, view administrator, or security administrator.

- **Casual Users** - have access to basic view features such as running views, editing existing sorts and filters, and saving views in that edited state as shared views or their own personal views.
- **Advanced Users** - have access to all non-administrator functionality -- they can build user lists, create user links, create actions and conditional formats, make edits to existing views and save them as shared views or their own personal views, access view explorer, and insert new measure items and charts into views.
- **View Administrators** - have access to all non-administrator functionality plus partial administrator access. That access includes setting up new views from scratch, setting up view groups, adding user profile groups using roles and user profiles already set up by a security administrator, and changing owners of various items in Stratum.Viewer (views, actions, user lists, conditional formats).
- **Security Administrators** - have access to all functionality including setting up roles and user profiles.

User profile groups provide administrators with a means of organizing users with common application needs. For example, a group of sales representatives may need access to the same sales and budget data and related views. Administrators can set up a user profile group, attach a role and view groups to it, and then assign the sales representatives to that group. All users in the group will see the same data and the same view groups in the left panel.



User profiles and user profile groups are flexible. You can assign the entire group the same role or assign each user's user profile a unique role. The second option still gives users access to the same view groups, but the data that each user sees in views will be unique to their role permissions.



Quick Start - Give Users Access to Stratum.Viewer

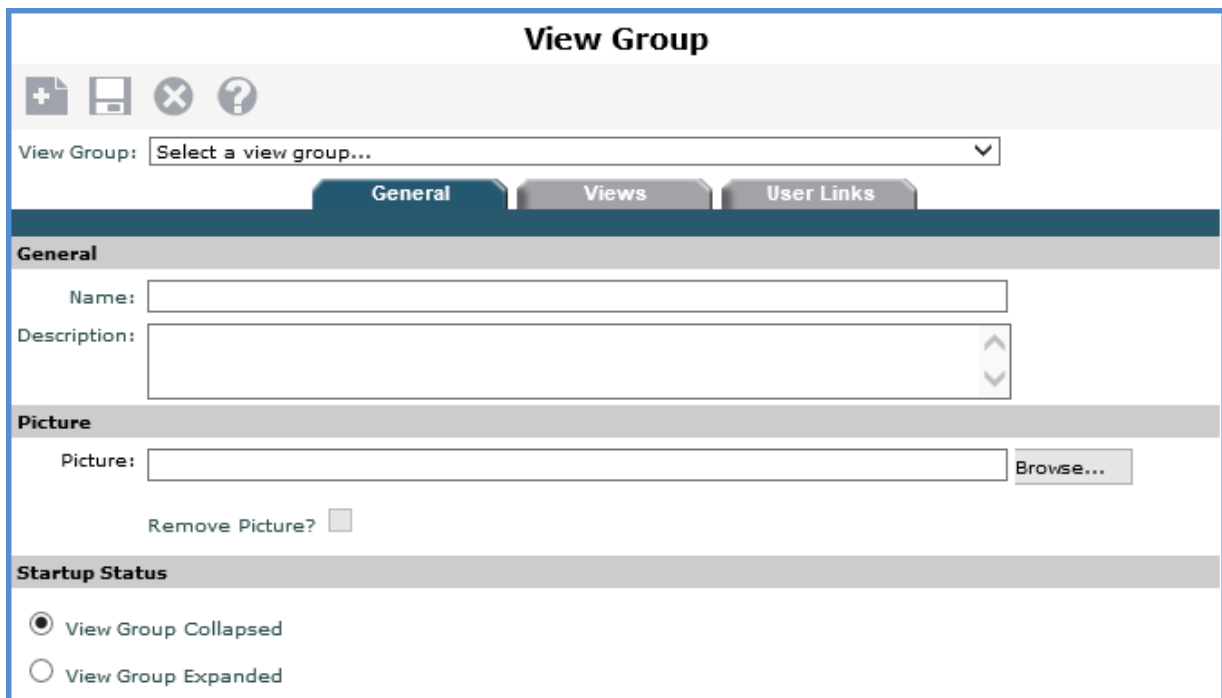
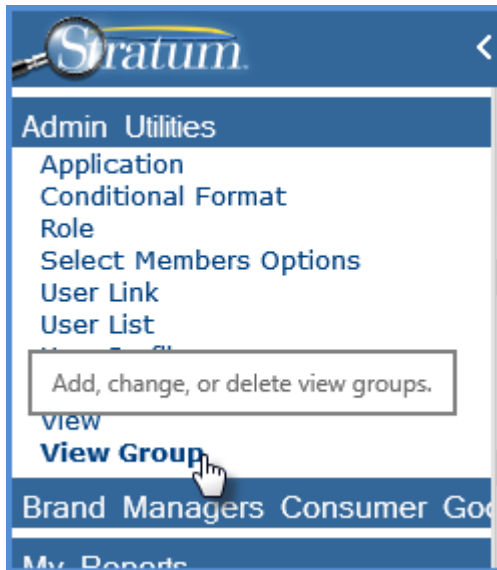
Anyone that needs access to Stratum.Viewer will need to have a role, user profile, and user profile group plus have at least one view group assigned to their user profile group.

The next few pages show a typical path taken for setting up access. The process is flexible and these steps can be performed in a different order depending on your preference and what definitions related to this set up already exist at the time you add a new user. For example, if a user profile group already exists, you can use that group for the new user if it meets the user's needs within the application. Or, if a suitable role exists, you can use that role for this user.

1

Add a view group(s) using the View Group window.

- Skip this step if view groups that are suitable for the new user already exist.
- Click View Group in the left panel to access the window.

A screenshot of the 'View Group' configuration window. The window has a title bar with the text 'View Group' and standard window control icons (minimize, maximize, close, help). Below the title bar is a dropdown menu labeled 'View Group:' with the text 'Select a view group...'. There are three tabs: 'General', 'Views', and 'User Links'. The 'General' tab is selected. The 'General' section contains a 'Name:' text box and a 'Description:' text area. The 'Picture' section contains a 'Picture:' text box with a 'Browse...' button and a 'Remove Picture?' checkbox. The 'Startup Status' section contains two radio buttons: 'View Group Collapsed' (selected) and 'View Group Expanded'.

2

Add a user profile group using the User Profile Group window.

- Skip this step if a group that's suitable for the new user already exists.
- Click User Profile Group in the left panel to access the [window](#).
- If you want users who belong to this group to share the same role and there is an existing role that suits the group needs, you can select the role from this User Profile Group window and skip Step 3.
- Attach at least one view group to the user profile group.



User Profile Group

+ [] [X] [?]

User Profile Group:

General

Name:


Role:

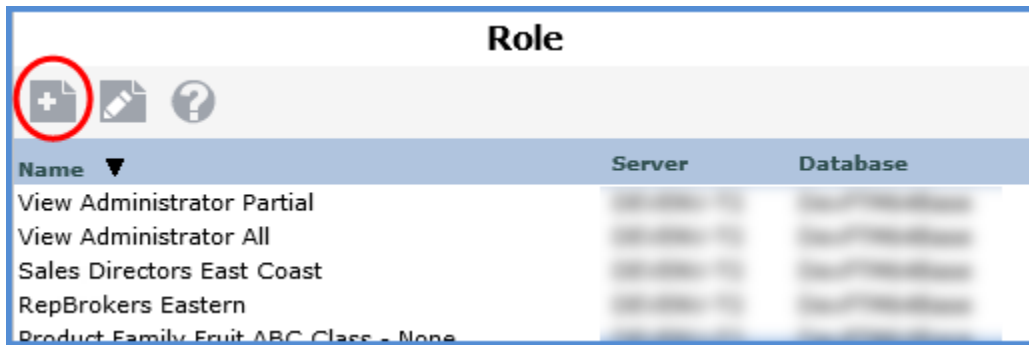
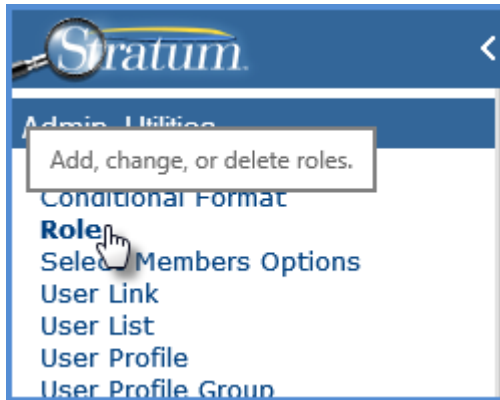
Override Home Page (ex. <http://www.silvon.com>)

View Groups	User Profiles												
<table border="1"><thead><tr><th>Order</th><th>Name</th></tr></thead><tbody><tr><td>0</td><td><input type="checkbox"/> Admin Utilities</td></tr><tr><td>0</td><td><input type="checkbox"/> Base Views with Time Ranges</td></tr><tr><td>0</td><td><input type="checkbox"/> Base Views without Time Ranges</td></tr><tr><td>0</td><td><input type="checkbox"/> Brand Managers Consumer Goods</td></tr><tr><td>0</td><td><input type="checkbox"/> Default View Group</td></tr></tbody></table>	Order	Name	0	<input type="checkbox"/> Admin Utilities	0	<input type="checkbox"/> Base Views with Time Ranges	0	<input type="checkbox"/> Base Views without Time Ranges	0	<input type="checkbox"/> Brand Managers Consumer Goods	0	<input type="checkbox"/> Default View Group	No user profiles available to be assigned.
Order	Name												
0	<input type="checkbox"/> Admin Utilities												
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0	<input type="checkbox"/> Base Views without Time Ranges												
0	<input type="checkbox"/> Brand Managers Consumer Goods												
0	<input type="checkbox"/> Default View Group												

3

Add a role using the Role Maintenance window.

- Click Role in the left panel to access the Role window.
- Click New  to open the Role Maintenance window and set up the role properties. Properties determine which dimension members and measures that users with this role will be able to access in Stratum.Viewer.
- If you want this new role assigned to the user profile group of the new user, select that group in the User Profiles tab. If you want the new role assigned to the new user's user profile, attach this role to the new user in Step 4.



The screenshot shows the Role Maintenance window. The title is 'Role'. There are three icons at the top: a plus sign (circled in red), a pencil, and a question mark. Below the icons is a table with columns 'Name', 'Server', and 'Database'.

Name ▼	Server	Database
View Administrator Partial		
View Administrator All		
Sales Directors East Coast		
RepBrokers Eastern		
Product Family Fruit ABC Class - None		

Role Maintenance

⏏ + × ← ?

General

Name:

Server:

Database:

Attributes
Measures
User Profiles

Select Attributes to Allow Access

Dimensions	Attributes	Access
ABC Classification Code	ABC Classification Code Value	All <input type="text" value="..."/>
Account Group	Account Group Value	All <input type="text" value="..."/>
Activity Account	Activity Account Value	All <input type="text" value="..."/>
Buyer	Buyer Value	Partial - Member List <input type="text" value="..."/>
Commitment Identifier	Commitment Identifier Value	All <input type="text" value="..."/>

4

Add the new user's user profile using the User Profile window.

- Click User Profile in the left panel to access the [window](#).
- For the Accessibility properties:
 - Select the user profile group that you added in Step 2.
 - Select a role if the selected user profile group doesn't have a role assigned to it. Otherwise, you don't need to select a role.



User Profile

+
☒
✕
?

User Profile:

General

First Name:

Last Name:

Windows User Name:

Windows Domain:

Email Address:

Language:

Disable User Profile

Accessibility

[User Profile Group](#):

Level:

[Role](#):

Override Home Page (ex. http://www.silvon.com)

User Options

Auto Hide Left Panel

Show View Explorer

Override Planning Update Format 1234.10





Override View Page Size Rows: Columns:

Tasks

Add a User Profile

A user profile cannot be activated until it belongs to a group and has a role assigned to it (either individually or to its group). If user profile groups or roles do not exist yet, you may prefer to set them up first and then add user profiles. See also [Quick Start - Give Users Access to Stratum.Viewer](#) and [Relationship between User Profiles, User Profile Groups, and Roles](#).




1. Click User Profile in the Admin Utilities view group.
2. Use the General section of the [User Profile window](#) to specify basic profile information about the user of this user profile.
 - The first and last name, the user's Windows user name (User ID), and the domain for their Windows profile are required.
 - The only special characters accepted in a user's Windows user name are () . ' _
 - Invalid names are ones containing any of these characters: \ / " [] : | < > + = ; , ? * @
 - A name cannot consist entirely of spaces or entirely of all periods.

- Entering the user's email address is required if you want the user to be able to email views or receive action emails. If you leave the Email Address field blank, the user will not be able to email views or receive action emails.
3. Use the Accessibility section to control the user profile group, level of access within the application, and role for the user of this user profile. You can optionally specify a home page for the user as well.
 - **User Profile Group** - Choose the group for this user profile. There must be at least one existing user profile group for this drop-down list to be populated. This aspect of a user profile also can be controlled via the [User Profile Group window](#).
 - **Level** - Choose what level of access the user for this user profile will have while using Stratum.Viewer. Options are Casual, Advanced, View Administrator, and Security Administrator.
 - **Role** - If you assigned the user profile to a group that already has a role assigned to it, you do not need to select a role. The user profile will use the same role as the one assigned to the group and this drop-down list will be disabled. If the group does not have a role assigned to it -- because you planned for each user profile to have a unique role -- then you will need to select a role. The drop-down list will be disabled if no roles exist yet or the user profile has a security administrator level of access.
 - **Override Home Page** - Optionally assign this user a home page that differs from the global home page associated with Stratum.Viewer. Enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user. Use the Browse from File  or Browse the Web  buttons if needed to select a home page.
 4. If you want to customize default interface and view behaviors for the user, use the properties in the User Options section. Or skip this step if you prefer that users customize their own options via their User Options window.
 - **Auto Hide Left Panel** – when selected, the left panel will hide automatically after the user runs a view from it. If you prefer that the left panel remain visible for the user, leave this option deselected.
 - **Show View Explorer** – when selected, view explorer will display automatically when the user runs a view. Otherwise, it will not display automatically, but the user can manually open it from the view toolbar.
 - **Override Planning Update Format** – when selected, you can customize the format for planning updates that the user makes in views. The Browse button  will be enabled. Click it to open the Select Format window and determine background color, font color, and other font properties for cells and values impacted by planning updates the user makes in views.
 - **Override View Page Size** – when selected, you can control how many rows and columns display per page of views that the user runs in page mode (also known as collapsed mode). Enter a numeric value in the Rows and Columns fields.
 5. Save  the user profile.

Add a User Profile Group

1. Click User Profile Group in the Admin Utilities view group.
2. Specify a name for the group in the [User Profile Group window](#).
3. Decide if you want to assign a role to the group. If not, skip to Step 4.
 - If you want all user profiles for this group to have the same role, select a role from the Role drop-down list.




Note: If a role does not exist, you can save the group without one. A security administrator can set up a role and assign the group to it from the Role Maintenance window.

- If you want each user profile for this group to have a unique role, don't select a role for the group. A security administrator can use the Role Maintenance or [User Profile window](#) to assign each user profile in the group to a role.
4. If you want to assign this user group a home page that differs from the global home page associated with Stratum.Viewer, use the Override Home Page property to do so.
 - Select the Override Home Page checkbox.
 - Enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user group. Use the Browse from File  or Browse the Web  buttons if needed to select a home page.
 5. Select the checkboxes of the view groups that you want displayed in the left panel for the user profile group. Optionally use the arrows next to selected view groups to change the order in which they'll appear in the left panel.
 6. Use the User Profiles section to select the user profiles that will be assigned to this group.
 - If no user profiles exist yet or all existing user profiles are assigned to groups already, you can save the group with no user profiles assigned. A security administrator can use the User Profile window to set up a new user profile and attach it to the group or to switch an existing user profile to the group.
 7. Save  the user profile group.


See also [Relationship between User Profiles, User Profile Groups, and Roles](#).

Define a Common Home Page for a User Group

If you want all members of a particular user group to have a common home page, assign that group a home page with the followings steps.


1. Click User Profile Group in the Admin Utilities view group.
2. In the General section, select the Override Home Page checkbox.
3. Enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user group. Use the Browse from File  or Browse the Web  buttons if needed to select a home page.
4. Save  the change.

Delete a User Profile

1. Click User Profile in the Admin Utilities view group.
2. Select the user profile in the [User Profile window](#).
3. Click Delete .
4. Select an option for Global Objects in the [Delete User Profile window](#) to determine how the user profile's global objects will be treated:


- **Delete** - Global objects will be deleted. That includes global views, actions, conditional formats, user lists, and user links.
 - **Reassign** - Global objects will be reassigned to a security administrator. Choose a security administrator's user profile from the list that is enabled once you've selected Reassign.
5. Select an option for Shared Objects to determine how the user profile's shared views will be treated:
 - **Delete** - Shared views will be deleted.
 - **Reassign** - Shared views will be reassigned to an advanced user, view administrator, or security administrator. Choose the user profile from the list that is enabled once you've selected Reassign.
 6. Click OK in the Delete User Profile window.
 7. You will be warned that personal objects will be deleted and global / shared objects will be deleted or reassigned (depending on your choices in Steps 4 and 5). Click OK if you want to proceed with deleting the user profile.

Delete a User Profile Group


1. Click User Profile Group in the Admin Utilities view group.
2. Select the user profile group in the [User Profile Group window](#).
3. Click Delete .

Note: Users with user profiles that belonged to this user profile group will no longer be able to access Stratum.Viewer unless you assign a different group to their user profile.


Disable or Enable a User Profile

1. Click User Profile in the Admin Utilities view group.
2. Select the user profile from the [User Profile window](#).
3. Select the Deselect User Profile option (to enable, deselect the option).
4. Save  the change.

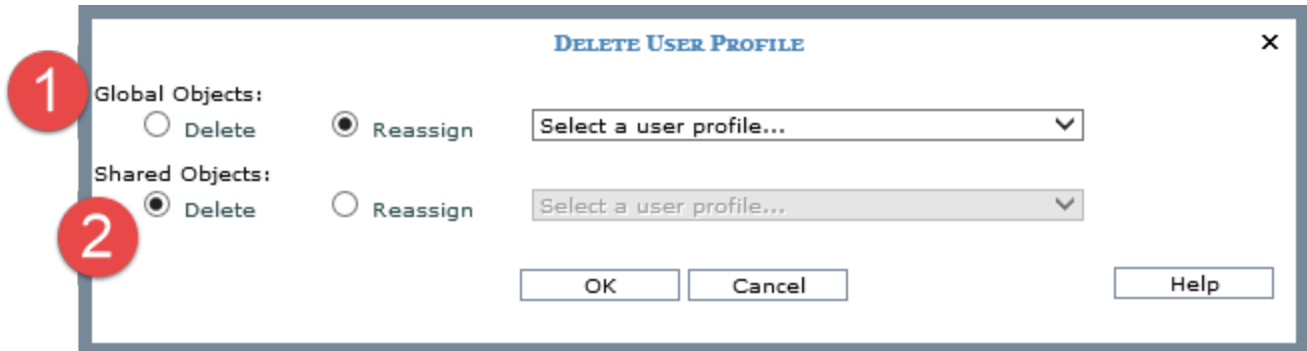
Edit a User Profile

1. Click User Profile in the Admin Utilities view group.
2. Select the user profile in the [User Profile window](#).
3. Edit the desired General, Accessibility, or User Options properties.
 - An email address must be specified if you want the user with this user profile to be able to email views and receive action emails.
 - The Role drop-down list will be disabled if the Accessibility Level selected for the user profile is Security Administrator.
4. Save  the changes.

Edit a User Profile Group

1. Click User Profile Group in the Admin Utilities view group.
2. Select the user profile group in the [User Profile Group window](#).
3. Edit the desired properties.
 - The Role drop-down list will be disabled. If you wish to change the role associated with this user profile group, you must do so using Role Maintenance.
 - If you remove a user profile from the group, the user with that user profile will no longer be able to access Stratum.Viewer. You will need to re-assign the user profile to another group if you want the user to continue having access.
4. Save  the changes.

Delete User Profile Window



<p>1</p>	<p>Options for Global Objects:</p> <ul style="list-style-type: none">• Delete - Select this option if you want to delete the global objects of the user whose profile is being deleted. Global objects are global views, user links, user lists, actions, and conditional formats.• Reassign - Select this option if you want to retain the global objects of the user whose profile is being deleted. The list next to this option will be enabled and populated with the names of security administrators. Choose a security administrator, and upon deletion of the user profile their global objects will be reassigned to that administrator.
<p>2</p>	<p>Options for Shared Objects:</p> <ul style="list-style-type: none">• Delete - Select this option if you want to delete the shared views of the user whose profile is being deleted.• Reassign - Select this option if you want to retain the shared views of the user whose profile is being deleted. The list next to this option will be enabled and populated with the names of advanced users, view administrators, and security administrators. Choose a user, and upon deletion of the user profile their shared views will be reassigned to that user.

Note: Personal objects will always be deleted for any user profile that is being deleted. Personal objects are personal views, user links, user lists, actions, and conditional formats.

Select User Window

Main Window Sections

Selected User: Terry Nagee

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 to 12 of 12

OK Cancel

1	<p>Selected User – The name of the user actively selected in the window displays here.</p>
2	<p>Available Users – Click a user then OK to select the user who will be an item owner.</p> <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</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.

User Profile Window

User Profile

1
2

User Profile:

General

3

First Name:

Last Name:

Windows User Name:

Windows Domain:

Email Address:

Language:

Disable User Profile

Accessibility

User Profile Group:

4
 Level:

Role:

Override Home Page
🔍 (ex. <http://www.silvon.com>)

User Options

Auto Hide Left Panel

Show View Explorer

Override Planning Update Format 1234.10 ...

Override View Page Size
 Rows:
 Columns:

1

Toolbar -


- New** - Click to clear the window and set up a new user profile. Note that a user profile cannot be activated until it belongs to a group and has a role assigned to it (either individually or to its group). If user profile groups or roles do not exist yet, you may prefer to set them up first and then add user profiles. See also [Quick Start - Give Users Access to Stratum.Viewer](#) and [Relationship between User Profiles, User Profile Groups, and Roles](#).
- Save** - Click to save a new user profile or to save edits to an existing user profile.
- Delete** - Select a user profile from the User Profile drop-down list, then click Delete to delete the user profile. The [Delete a User Profile](#) window displays. You have the option of deleting global objects (views, user lists, user links, actions, conditional formats) that belong to the user profile or reassigning global objects to a security administrator.
- Help** - Click to open help that is specific to working with user profiles.

2	<p>User Profile - Use this list to select an existing user profile and populate the window with its properties.</p>
3	<p>General -</p> <p>Use the following options to define or edit basic profile information about the user of this user profile.</p> <ul style="list-style-type: none"> • First Name and Last Name - The user's first and last name. • Windows User Name and Windows Domain - The user's Windows user name (User ID) and the domain for their Windows profile. The only special characters accepted in a user's Windows user name are () . ' _ . Invalid names are ones containing any of these characters: \ / " [] : < > + = ; , ? * @ , consisting entirely of spaces, or consisting entirely of periods. • Email Address - Entering the user's email address is required if you want the user to be able to email views or receive action emails. If the Email Address field is left blank, the user will not be able to email views or receive action generated emails. • Language - This is always set to English. <p>Use the following checkbox if you need to disable an existing user profile.</p> <ul style="list-style-type: none"> • Disable User Profile - The checkbox is de-selected by default, meaning the user profile will be active as long as it has a user profile group and role. When the checkbox is selected, the user profile information will be retained but the user will not be able to access the application.
4	<p>Accessibility - Use this section to control the group for the user profile, the level of access the user will have in the application, and potentially the role for the user profile.</p> <ul style="list-style-type: none"> • User Profile Group - Controls the group for this user profile. There must be at least one existing user profile group for this drop-down list to be populated. This aspect of a user profile also can be controlled via the User Profile Group window. • Level - Controls the level of access the user for this user profile will have while using Stratum.Viewer. Options are Casual, Advanced, View Administrator, and Security Administrator. <ul style="list-style-type: none"> • Casual users have access to basic view features such as running views, editing existing sorts and filters, and saving views in that edited state as shared views or their own personal views. • Advanced users have access to all non-administrator functionality -- they can build user lists, create user links, create actions and conditional formats, make edits to existing views and save them as shared views or their own personal views, access view explorer, and insert new measure items and charts into views. • View administrators have access to all non-administrator functionality plus partial administrator access. That access includes setting up new views from scratch, setting up view groups, adding user profile groups using roles and user profiles already set up by a security administrator, and changing owners of various items in Stratum.Viewer (views, actions, user lists, conditional formats). • Security administrators have access to all functionality including setting up roles and user profiles. • Role - If the user profile is assigned to a group that already has a role assigned to it, you do not need to select a role for the user profile. The user profile will use the same role as the one assigned to the group and this drop-down list will be disabled. If the group does not have a role assigned to it -- because you planned for each user profile to have a unique role -- then you will need to select a role. The drop-down list will be disabled if no roles exist yet or the user profile has a security administrator level of access. • Override Home Page - Use this option if you need to assign the user a home page that differs from the global home page associated with Stratum.Viewer. Select the Override Home Page checkbox. Then enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user. Use the

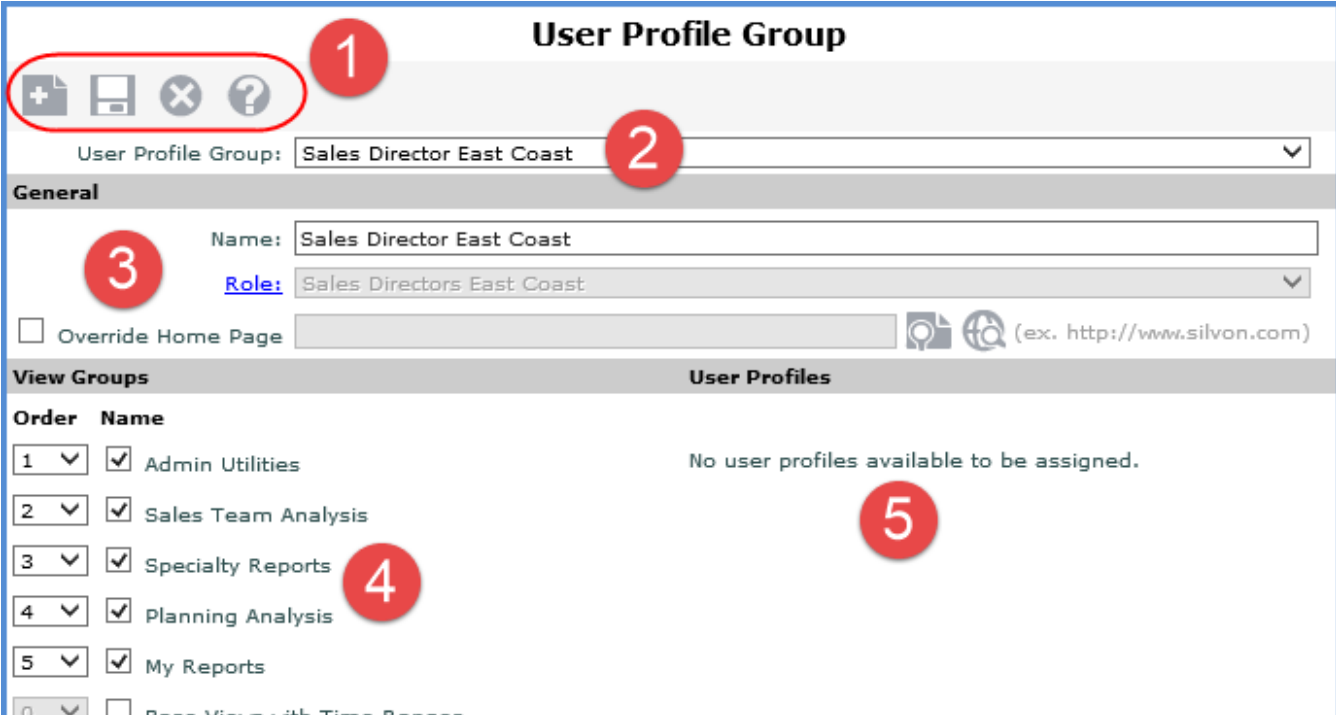
Browse from File  or Browse the Web  buttons if needed to select a home page.

5

User Options

- **Auto Hide Left Panel** – Use to control whether or not the left panel will hide automatically after the user runs a view from it. By default, the checkbox is selected and the panel will be hidden when the user runs a view. If you prefer that the left panel remain visible for the user, leave this option deselected.
- **Show View Explorer** – Use to control whether or not view explorer will display automatically when the user runs a view. Select the checkbox if you want view explorer to display. Otherwise, it will not display automatically, but the user can manually open it from the view toolbar.
- **Override Planning Update Format** – Use to customize the format for planning updates that the user makes in views. The Browse button  will be enabled. Click it to open the Select Format window and determine background color, font color, and other font properties for cells and values impacted by planning updates the user makes in views.
- **Override View Page Size** – Use to control how many rows and columns display per page of views that the user runs in page mode (also known as collapsed mode). Enter a numeric value in the Rows and Columns fields.




User Profile Group Window






The screenshot shows the 'User Profile Group' window. At the top, a toolbar contains icons for New (+), Save (floppy disk), Delete (X), and Help (?), with a red circle and the number 1 around them. Below the toolbar is a dropdown menu for 'User Profile Group' set to 'Sales Director East Coast', with a red circle and the number 2. The 'General' section has a 'Name' field with 'Sales Director East Coast' and a 'Role' dropdown with 'Sales Directors East Coast', with a red circle and the number 3. There is an 'Override Home Page' checkbox and a text field with a home page icon and a URL '(ex. http://www.silvon.com)', with a red circle and the number 3. The 'View Groups' section has a table with columns 'Order' and 'Name'. The table lists five groups: 'Admin Utilities', 'Sales Team Analysis', 'Specialty Reports', 'Planning Analysis', and 'My Reports', each with a dropdown arrow and a checked checkbox. A red circle with the number 4 is next to 'Specialty Reports'. To the right of the table, the text 'No user profiles available to be assigned.' is displayed, with a red circle and the number 5 next to it.

1

Toolbar -

- **New**  - Click to clear the window and set up a new group.
- **Save**  - Click to save a new group or to save edits to an existing group.
- **Delete**  - Select a group from the User Profile Group drop-down list, then click Delete to delete the group.

	<ul style="list-style-type: none"> • Help  - Click to open help that is specific to working with user profile groups.
2	<p>User Profile Group - Use this list to select an existing group and populate the window with the group's properties.</p>
3	<p>General -</p> <ul style="list-style-type: none"> • Name - Use this field to specify or edit the group name. • Role - Use this drop-down list if you need to assign a role to the entire group. In that case, all user profiles in the group will have the same role. If no role exists, then you can click Role to access the Role window and add a role. Cases when you would not need to choose a role are for a group are: <ul style="list-style-type: none"> • If all the user profiles in the group will have roles assigned to them individually. That means user profiles in this group may have different roles. You can use the User Profile window or Role Maintenance window to assign a role to an individual user profile. • When the group is intended to only have user profiles that have a security administrator level of access in the application. Security administrators do not need to have roles assigned to them. • Override Home Page – Use this option if you need to assign the user group a home page that differs from the global home page associated with Stratum.Viewer. Select the Override Home Page checkbox. Then enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user group. Use the Browse from File  or Browse the Web  buttons if needed to select a home page.
4	<p>View Groups - Selected view groups will be visible in the left panel for user profiles in the user profile group. Once a group is selected, the Order drop-down list is enabled for it. Use those lists to control the order that the groups display within the left panel. View groups and user profiles can also be attached to one another using the View Group window.</p>
5	<p>User Profiles - For new groups, this section will list any existing user profiles that do not belong to a user profile group yet. There will be check boxes next to the user profiles for adding them or removing them from a group. If no user profiles exist or all of the existing user profiles have been assigned to other groups, the text 'No user profiles available to be assigned' displays in this section.</p>

Advanced Concepts

Change the Owner of a User's Views, User Lists, Conditional Formats, or Actions

View or security administrators can change the owner of views, user lists, conditional formats, or actions. This functionality helps administrators carry out tasks for user and object maintenance in less time and fewer steps. Here are a couple examples of the usefulness of this functionality:





- You need to promote a user's personal or shared items to a Global status. You open the item, make yourself the owner, change the type to global, and save the item. Now the item is globally available to all users, but editing control is limited to you and other administrators.
- You need to remove a user from Viewer but want to retain some of the personal views created by that user. You open the views and reassign ownership prior to deleting the user's profile.

A Select User window corresponds to an Owner property for use in changing an item's owner, and it features a search and filter tool to find particular users as you work in this selection window. Steps follow for changing the owner of different types of objects.

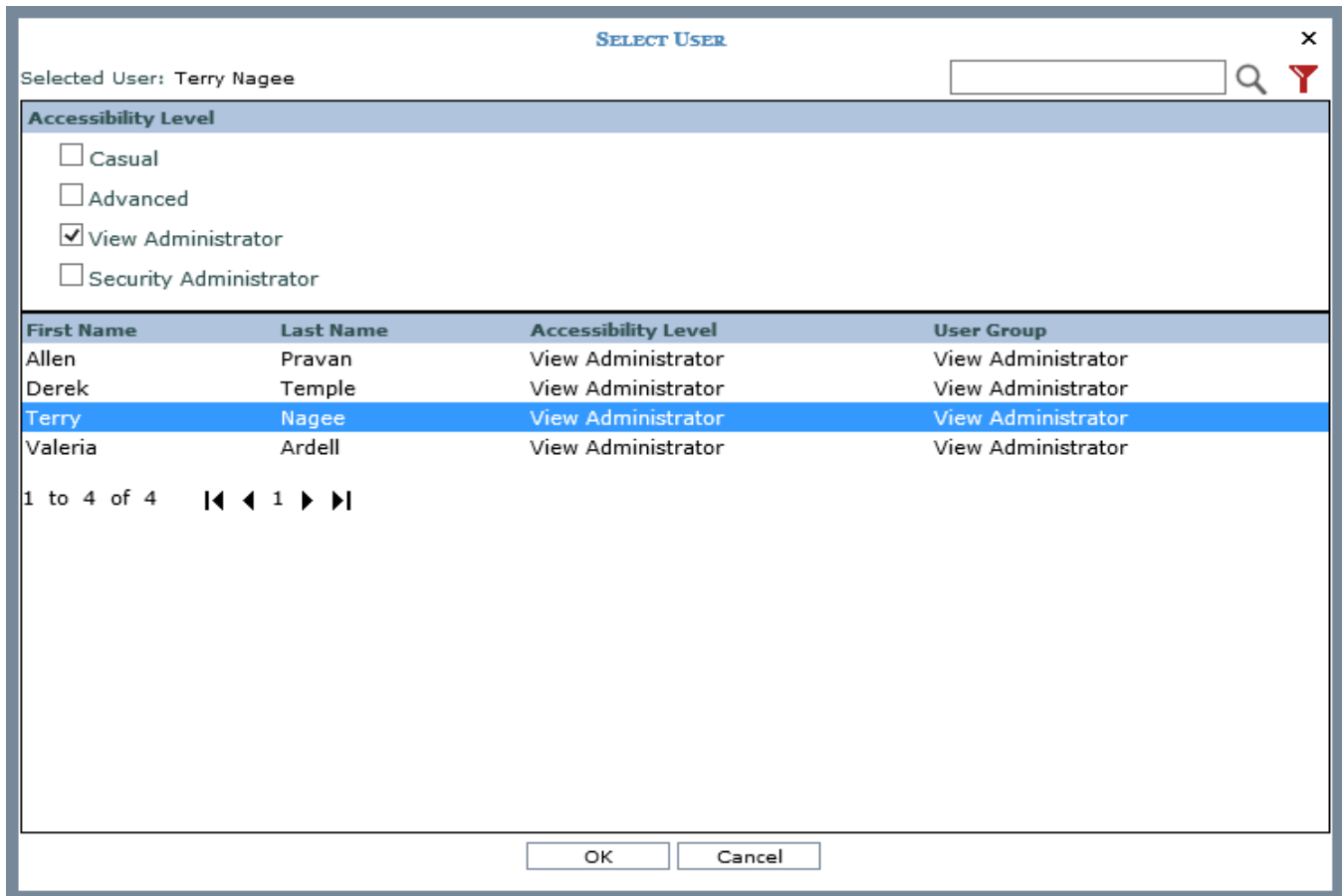
- [Views](#)
- [User Lists](#)
- [Conditional Formats](#)
- [Actions](#)

Changing a View Owner


Option 1

1. From its view group in the left panel, right-click the view name and choose Edit.
2. Right-click the first folder in view explorer, for the view name, and choose Properties.
3. Click the Browse button  for the Owner property.
4. In the Select User window, click the name of the new Owner for the view, and then click OK in that window. You can narrow down the users that display for selection in the window using the search  and/or filter  tools.
5. Click OK in the Apply Changes window.
6. After the view refreshes, click Save  in the view toolbar.










Option 2

1. Click the View option in the Admin Utilities view group.
2. From the View list window, click the name of the View then click Edit  (or double-click the view name).
3. Follow steps 3 through 6 in the prior set of instructions.

Changing a User List 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  (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  and/or filter  tools.
5. Click Save .

User List Maintenance

General

Name:

Description:

Type:

Security User List:

Mode:

Server:

Database:

Dimension:

Hierarchy:

Level:

Attributes

Member Count: 56

Created Date: 03/28/2014 10:57:35

Owner:

Last Updated Date: 03/28/2014 11:00:41

Last Updated By: Donna Full Name

Last Used Date: 05/06/2014 09:56:51

Last Used By: Donna Full Name

Source: Viewer

Changing a Conditional Format 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.
4. In the Select User window, click the name of the new Owner for the view, and then click OK in that window. You can narrow down the users that display for selection in the window using the search and/or filter tools.
5. Click Save .

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	<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

Changing an Action Owner

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

View Distribution -- Webpage Dialog

General

Name:

Description:

Type: Action Parameters:

Distribution Method:

Process for Users:

Email

Subject:

Attachment Type:

Body:

Include Link to View:

Send Email when no Data Exists:

Subject Prefix when no Data Exists:

Attributes

Action ID: 7113

View Name: Percent of Total Growth by Product

Created Date: 06/23/2014 13:42:12

Last Updated By: Karen

Last Updated Date: 06/23/2014 13:42:39

Last Processed Date: 06/23/2014 13:43:00

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

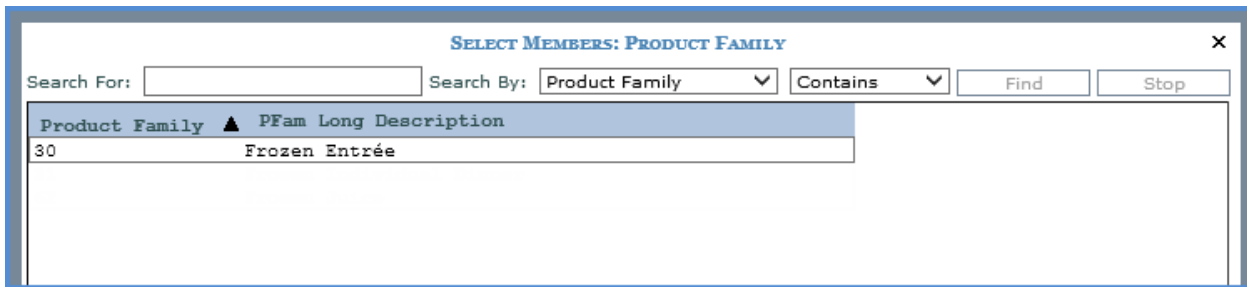
Here is a view for someone whose role only permits access to Product Family 30. Only sales for Product Family 30 will display in the view for that user.

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	
Grand Total		\$76,402,409	1,073,723	

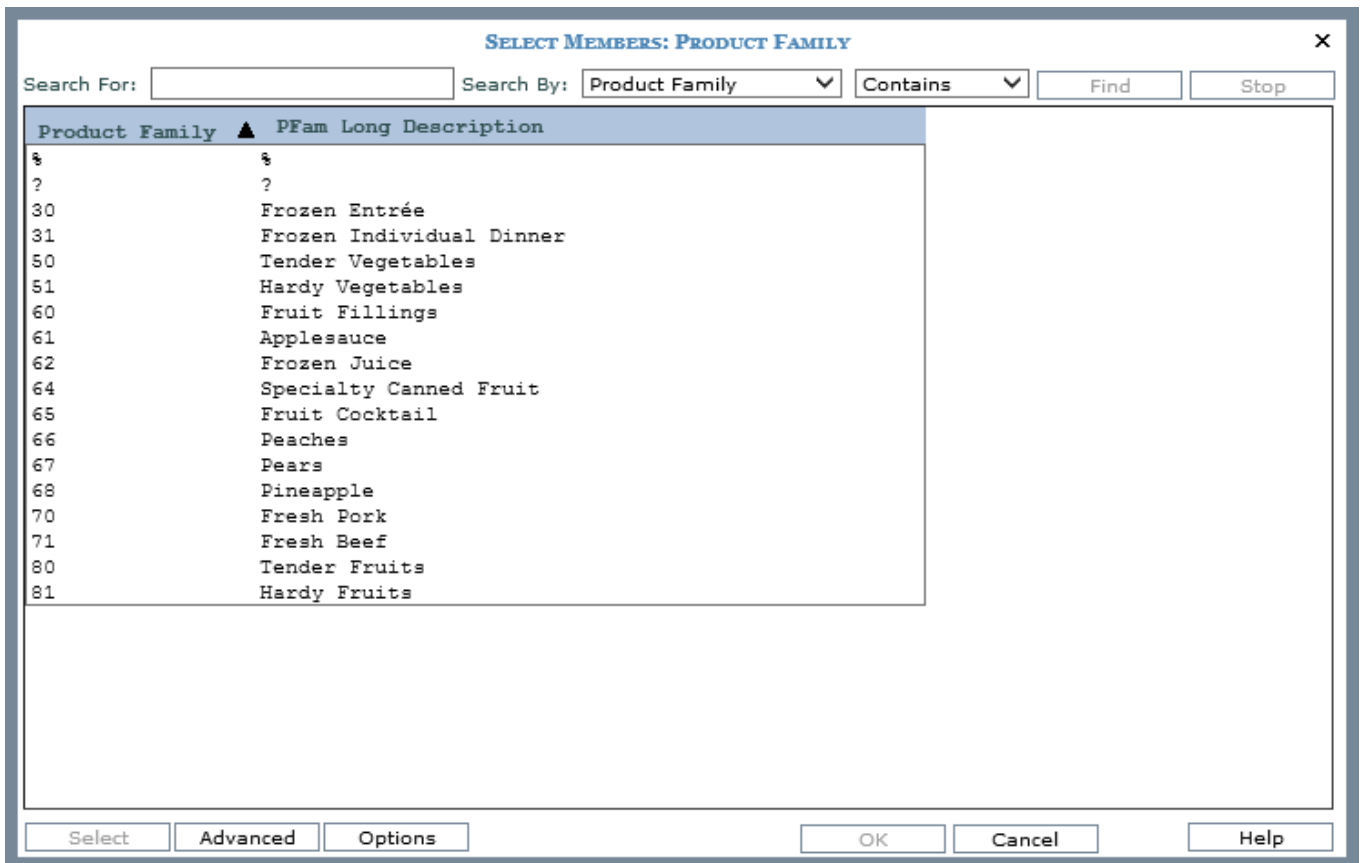
Here is the same view run by a user with full access to the Product Family dimension. The view displays data for all Product Families.

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.

SELECT USER LIST FILTER: PRODUCT FAMILY [Close]

Selected User List: Frozen Product Families [Search] [Filter]

Name ▲	Type	Owner	Last Used
Frozen Product Families	Global	Karen	08/19/2014 18:37:45
Product Family All Except Default Values	Global	Mary	04/09/2013 17:16:01

1 to 2 of 2 [Navigation]

Description: Products that ship frozen Member Count: 1 Mode: Static

Product Family ▲	PFam Long Description
30	Frozen Entrée

1 to 1 of 1 [Navigation]

[OK] [Cancel]

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

SELECT USER LIST FILTER: PRODUCT FAMILY [X]

Selected User List: Frozen Product Families [Search] [Filter]

Name ▲	Type	Owner	Last Used
Frozen Product Families	Global	Karen	08/19/2014 18:36:00
Product Family All Except Default Values	Global	Mary	04/09/2013 17:16:01

1 to 2 of 2 [Navigation]

Description: Products that ship frozen [Member Count: 3] Mode: Static

Product Family ▲	PFam Long Description
30	Frozen Entrée
31	Frozen Individual Dinner
62	Frozen Juice

1 to 3 of 3 [Navigation]

[OK] [Cancel]

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

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.

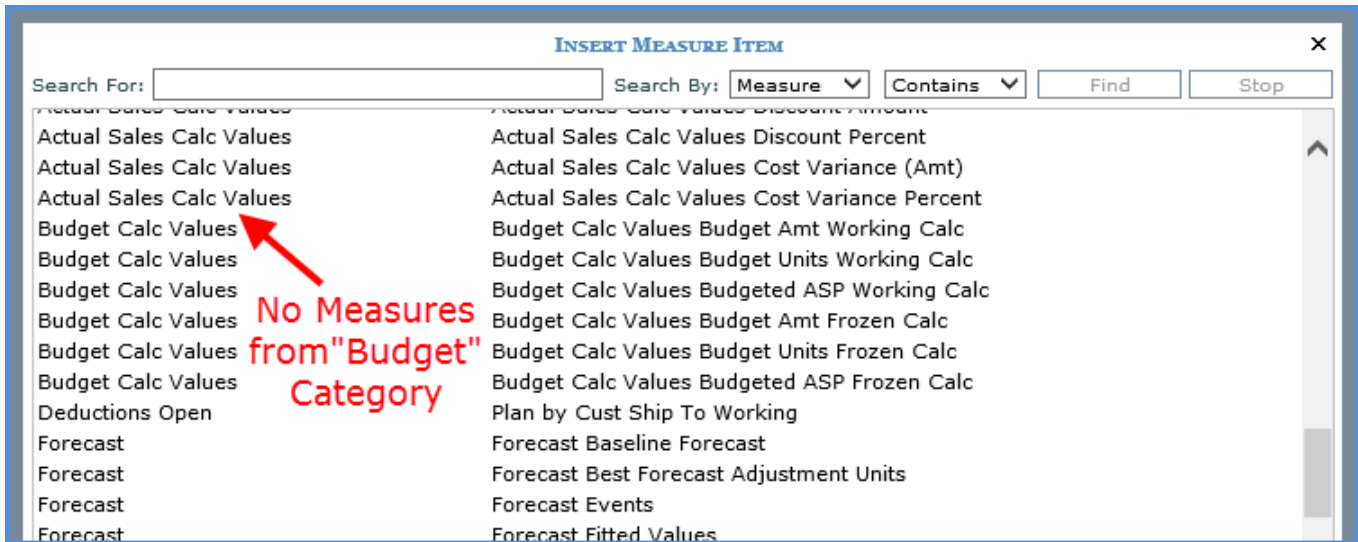
View Name: *Current Yr Sales and Budget by Family*

View Filter

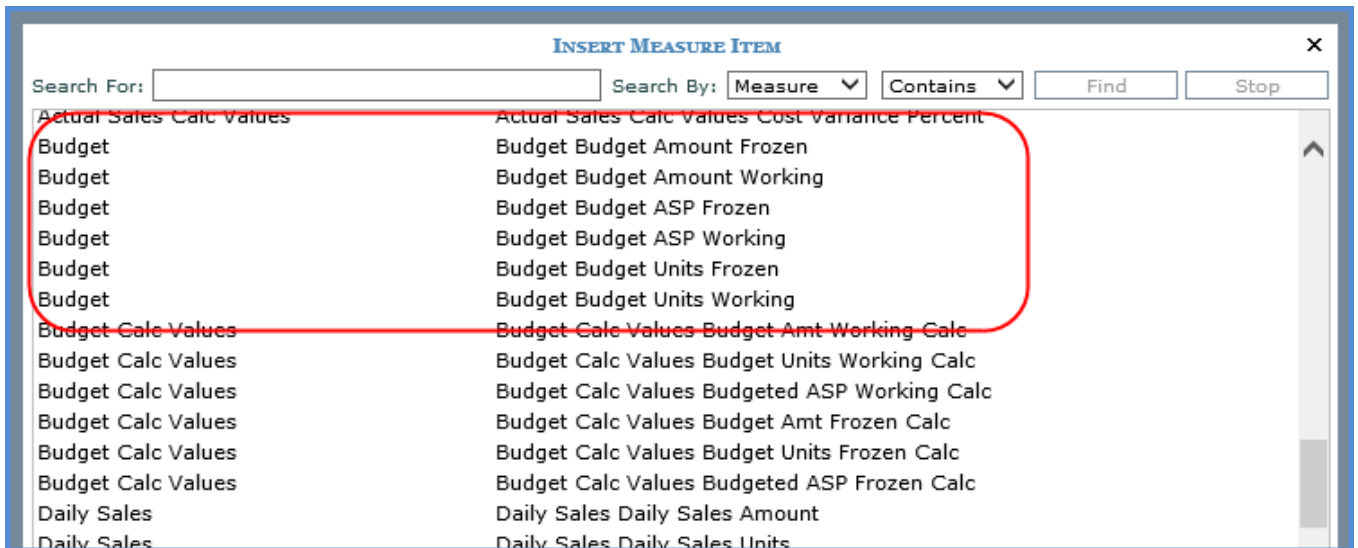
Year >> 2014

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

<u>ABC Classification Code</u>	T 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

<u>ABC Classification Code</u>	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
<u>A</u>	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

Relationship between User Profiles, User Profile Groups, and Roles

Users will only be able to access Stratum.Viewer if they have a user profile that has been assigned to a user profile group. Additionally, the user must have a role attached to their individual user profile or to their user profile group.

Other facts about the related nature of user profiles, groups, and roles:

- If a role is attached to a user's user profile, the user will have a role that is unique from other users assigned to their user profile group.
- If a role is attached to a user's user profile group, the user will have the same role as all other users assigned to that group.
- A role definition will not be active in Stratum.Viewer until it has been attached to a user profile or user profile group.
- Users who have a security administrator level of access, as defined by their user profile, do not need to be assigned a role. Security administrators have access to all dimension members and measures in all Analysis Services databases registered with Stratum.Viewer.

Relationship between View Groups and User Profile Groups

View groups will only be visible in the left panel if they are attached to a user profile group. When you add a new view group, remember to attach it to the user profile groups of users who need access to the view groups. User profile groups need to be attached to at least one view group.

Frequently Asked Question (FAQ)

What Happens to Objects Created by Users when their User Profiles are Deleted?

Personal objects such as personal user lists, user links, actions, conditional formats, and views are removed from Stratum.Viewer. Global objects can be reassigned to a security administrator's user profile. Shared views can be reassigned to the user profile of an advanced user, view administrator, or security administrator.

Definitions

Role

A role is a definition that determines which dimension members and measures a user can access in Stratum.Viewer. A role is used in conjunction with user profiles, user profile groups, and view groups to give users access to the application.

User Profile

A user profile is a definition that gives a user the ability to sign on and use Stratum.Viewer. A user profile is used in conjunction with user profile groups, view groups, and roles to give users access plus determine what features or functions they can use, such as administrator or non-administrator features.

User Profile Group

A user profile group is a group of Stratum.Viewer users. Stratum.Viewer security administrators control security and view group access by user profile groups or by individual users.

View Group

A view group is a means of organizing view and user links. Once a group is created, has at least one view or link attached to it, and is attached to a user profile group, the view group will display in the left panel of the application. The view group can only be seen by users who belong to the user profile group(s) to which the view group has been attached.