Using Views
Stratum.Viewer 6

Getting Started

- Access to Views
- Introduction to Views

Tasks

- Delete a View
- Drill Up or Down within a View
- Edit the Order of View Objects Using Drag and Drop
- Email a View
- Export to Excel
- Run a View
- Run a View with Parameters
- Transpose a View
- Use Grid Pop-up Menus as Task Shortcuts
- Use "Save As" to Create a New View
- Use Sort and Filter Icons as Task Shortcuts
- Use View Explorer Pop-up Menus as Task Shortcuts

Additional Information

Windows

- Address Book Window
- Email View Window
- Export to Excel Open / Save Prompt
- Export to Excel Worksheets
- Grid
- Grid Pop-up Menus
- Grid Toolbar
- Measure Item Filter Window
- Properties Window for a View
- Save View As Window
- Select Filter Method Window
- View Explorer
- View Explorer Pop-up Menus
- View Prompt Window

Advanced Concepts

- Change the Owner of a View
- Considerations when Exporting to Excel
- Designating a View as Shared
- Edit Basic View Properties (name, description, view group, type)
- Identifying which Server, Databases and Cube are Assigned to a View
- Impact of Roles on What Data You Can Access in Stratum.Viewer
- View Types and Recommendations

FAQ's

- Why can't I Delete a View?
- Why can't I save a View After Editing It?
- Why can't I see a View I just Added?

Getting Started

Access to Views

You can see and run views from the view groups that display in your left panel. From within each of your groups, you'll be able to run all of the global and shared views that belong to the group as well as any of your own personal views that belong to the group. You won't be able to see or run the personal views of other users from your left panel view groups.
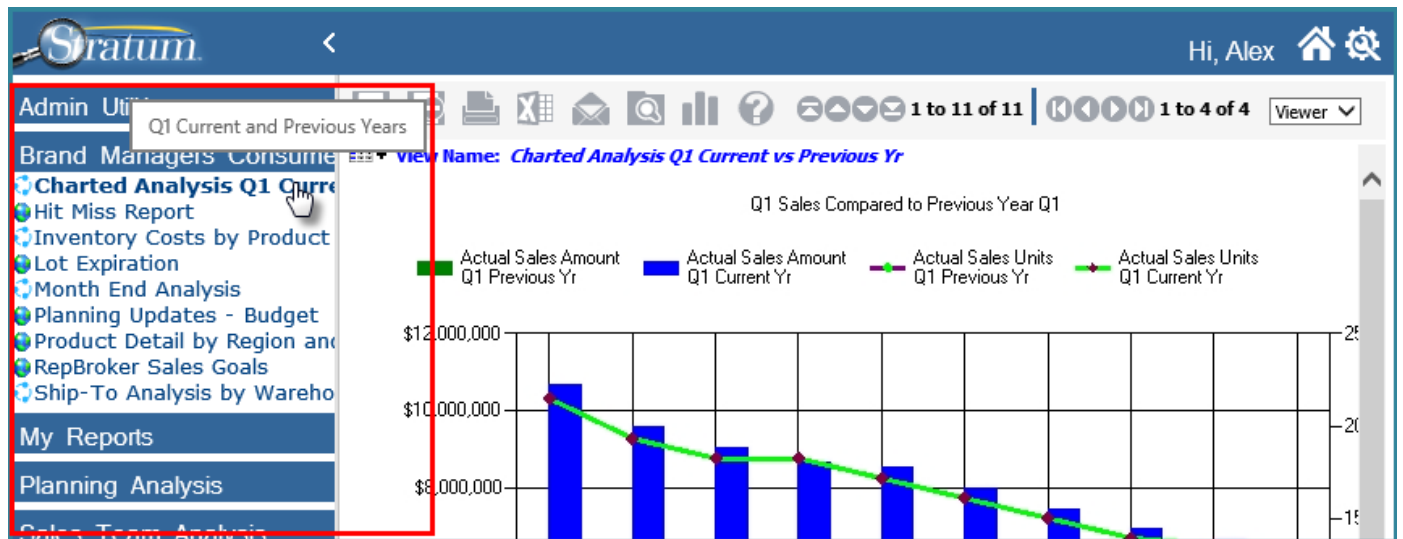
The lists below summarize what users can do with different types of views, which is also impacted by their level of access in Viewer (casual, advanced, view administrator, or security administrator).

Casual and Advanced Users

Casual and advanced users can do the following:

- Run any global or shared views that are in their view groups.

- Run their personal views from their view groups.

- Edit or delete the personal or shared views that they own.

- Create a personal or shared view by doing a Save As on any existing view to which they already have access.

- Open links to any type of view from Viewer-generated emails – for example, links to a global view, shared view, or someone else's personal view. Viewer security will be applied when the user runs the link so the user only sees view data applicable to their role in Viewer.

Administrators

Administrators can do all of the above with views, in addition to being able to:

- Create and manage global views.

- Edit and delete all views.

- Create any type of view from scratch via the View list window or by doing a Save As on any existing view.

Introduction to Views

Views give you instant access to data from your business transaction systems. They help you make knowledge-based decisions. Views consist of levels, members, and measure items. That data, presented in a grid format, can be configured numerous ways to suit your individual needs. Data can be:

- Organized along rows only, columns only, or both rows and columns.
- Compared across multiple points in time by way of time ranges that you assign to measure items.
- Presented in a single or multi-level format. The multi-level format is a helpful tool for quickly drilling through large volumes down to low levels of detail.
- Sorted or filtered, such as filtered to show a top or bottom count, percent, or sum.
- Presented with or without sub-totals, grand totals, and detail cell repeating values.
- Exported to Microsoft Excel or emailed via the grid or actions.
- Edited for planning purposes (only applies to planning enabled views).

You can re-configure views on-the-fly by drilling through levels, dragging and dropping objects to rearrange them, hiding or adding objects, and adding or editing sorts and filters.

Example View with Time Ranges

Here is a view with multiple levels on rows. Sub-totals and a grand total are displayed. Measure items with time ranges exist along the columns axis. The points in time specified for comparison are the current month of the current year and last year. The captions associated with the measure items tell you that as of this running of the view, those points in time are September of 2014 and 2013.

View Name: *Multi Level Sales Views*

View Filter

Company	Co Long Description	Distribution Center Warehouse	Ship-To Region	Actual Sales Units Sep 2014 to Sep 2014	Budget Units Sep 2014 to Sep 2014	Actual Sales Units Sep 2013 to Sep 2013	Budget Units Sep 2013 to Sep 2013
100	Fresh to Market Foods, Inc	Omaha	Eastern U.S.	1,266,622	820,872	1,264,018	916,152
			Southern U.S.	861,287	485,328	749,723	541,661
			Midwest U.S.	1,450,870	890,816	1,424,974	994,214
			Western U.S.	728,612	408,312	597,394	455,705
			Eastern Canada	659,649	405,691	620,381	452,780
			Western Canada	970,369	589,874	842,264	658,342
			Omaha Total	**5,937,408**	**3,600,893**	**5,498,754**	**4,018,854**
		Charlotte	Eastern U.S.	1,360,431	817,234	1,177,177	912,092
			Southern U.S.	893,382	595,090	967,406	664,163
			Midwest U.S.	1,772,685	1,073,930	1,409,676	1,198,583
			Western U.S.	619,142	425,155	637,951	474,503
			Eastern Canada	764,018	488,127	696,232	544,784
			Western Canada	746,449	468,052	738,333	522,380
			Charlotte Total	**6,156,107**	**3,867,588**	**5,626,774**	**4,316,504**
		100 Total		**12,093,515**	**7,468,481**	**11,125,528**	**8,335,358**
Grand Total				**12,093,515**	**7,468,481**	**11,125,528**	**8,335,358**

Example View with Time Hierarchies

Here is a view that uses time hierarchies on rows and columns, filtered to show only current year and last year data. The view presents you with yearly data by month.

View Name: *Monthly Sales Views*
View Filter

		Last Year			Current Year		
Company >>	100						
Co Long Description	Fresh to Market Foods, Inc						
Year Based >>		Last Year			Current Year		
Months		Sales Amount	Sales Units	Avg Selling Price	Sales Amount	Sales Units	Avg Selling Price
January		$650,655,727	11,579,068	$56.19	$350,714,364	6,258,847	$56.03
February		$549,211,669	9,929,320	$55.31	$322,332,391	5,825,361	$55.33
March		$652,242,257	11,862,018	$54.99	$361,004,874	6,553,215	$55.09
April		$645,861,506	11,733,747	$55.04	$327,807,806	6,867,712	$47.73
May		$468,934,747	8,413,481	$55.74	$352,020,685	7,798,802	$45.14
June		$682,957,762	12,242,975	$55.78	$375,671,295	8,910,194	$42.16
July		$997,610,460	17,933,690	$55.63	$391,977,666	9,613,083	$40.78
August		$755,754,978	13,414,447	$56.34	$485,764,510	12,744,274	$38.12
September		$627,060,751	11,125,528	$56.36	$569,861,272	12,093,515	$47.12
October		$394,333,571	6,581,900	$59.91			
November		$367,487,985	6,093,229	$60.31			
December		$220,048,674	3,624,759	$60.71			
Grand Total		$7,012,160,085	124,534,163	$56.31	$3,537,154,864	76,665,003	$46.14

Tasks

Delete a View

1. Right-click the view in the left panel, and select Delete.

   OR

1. If you are using the view, right-click its name above the grid and select Delete.

2. Confirm the deletion.

Drill Up or Down within a View

Steps for drilling through the pre-defined drill down path in a view:

- Drill on Detail
- Drill on Header
- Drill Within a Chart

Drill on Detail

1. Click on a detail cell to drill to the next defined level by a particular member.

   - A detail cell contains the member for a level in the grid.
   - The level below the drilled-on level will be filtered to show data relevant only to the drilled-on member.

The resulting view displays all Products within the "Wilder Foods – St Louis MO WOB" Customer Ship-To because Product was the next defined level within the view.
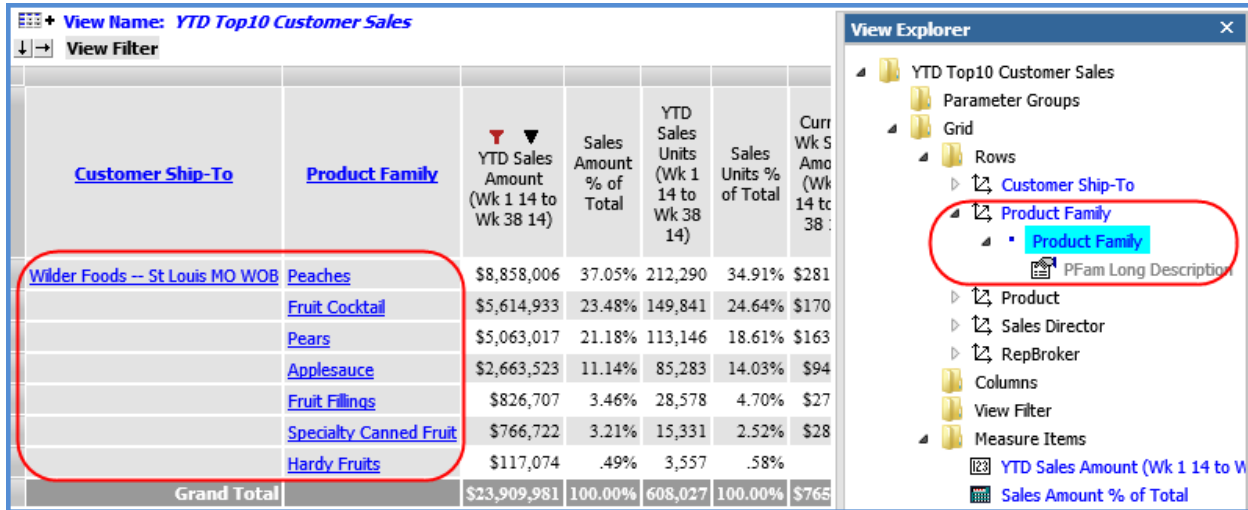
OR

1. Drill down using the <u>view explorer</u> drag and drop functionality.

- Drag a level from view explorer into the grid and drop it onto a detail cell in columns or rows.

- The next level to display when the grid is refreshed will be the one you dropped into the view rather than the one pre-defined as the next drill down level for the view.

In the example below, Product Family was clicked and dragged onto Wilder Foods – St Louis MO WOB. The detail for the Product Family within the drilled on Customer Ship-To is shown.
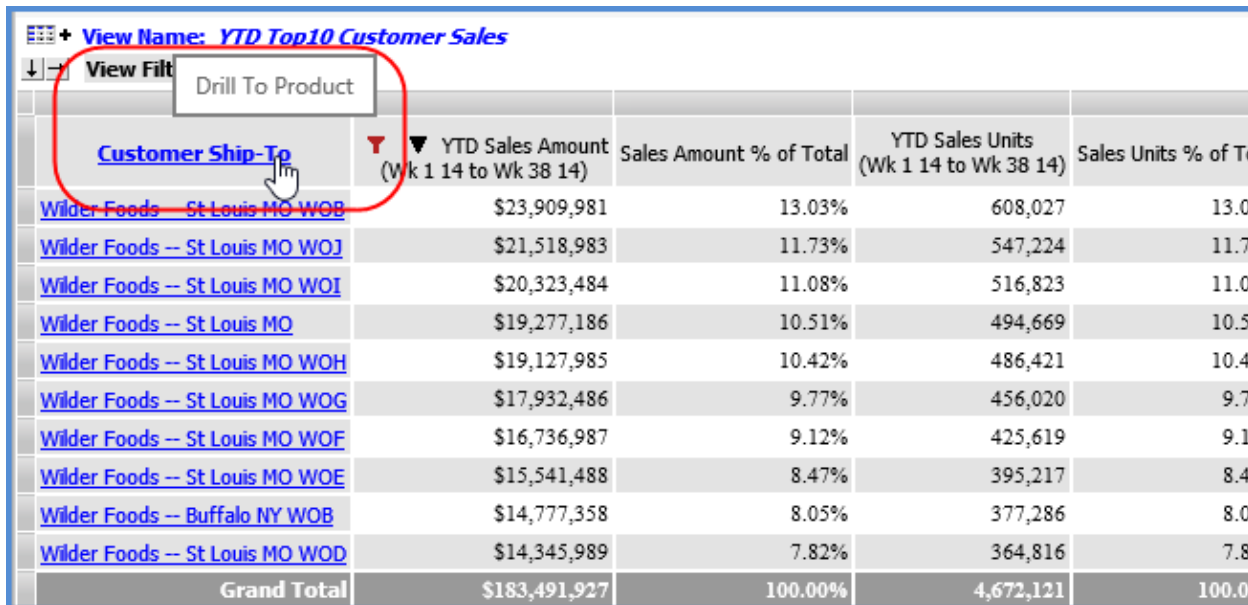

Drill on Header

1. Click on a header cell of the level to drill to the next defined level and see all its members.

- A header cell contains the name of the level.

- The drill down will be performed for each member of the drilled on level.

The resulting view displays data from the next level, in this case "Product." You can see Products subtotaled by Customer Ship-To's.

Customer Ship-To	Product	▼ ▼ YTD Sales Amount (Wk 1 14 to Wk 38 14)	Sales Amount % of Total	YTD Sales Units (Wk 1 14 to Wk 38 14)	Sales Units % o Total
Wilder Foods -- St Louis MO WOB	Peach 6oz LnchPk BR* 5B	$2,457,557	.09%	33,350	.06%
	Pear 6oz LnchPk LS 5B	$2,267,477	.08%	30,658	.05%
	Applesauce 12oz PL* 5B	$1,988,870	.07%	65,436	.11%
	Peach Slcs LS 12oz BR* 5B	$1,710,909	.06%	47,960	.08%
	FrtCktail LS 12oz PL* 5B	$1,334,178	.05%	45,233	.08%
	FrtCktail LS 12 oz BR* 5B	$1,265,923	.05%	33,999	.06%
	FrtCktail 6oz LnchPk BR* 5B	$1,196,552	.04%	16,135	.03%
	Pear Hlvs LS 12oz PL* 5B	$1,162,275	.04%	39,091	.07%
	Pear Slcs LS 12 oz BR* 5B	$1,054,369	.04%	28,430	.05%
	FrtCktail HS 12 oz BR* 5B	$975,653	.04%	26,972	.05%
	Wilder Foods -- St Louis MO WOB Total	**$15,413,763**	**.56%**	**367,264**	**.64%**
Wilder Foods -- St Louis MO WOJ	Peach 6oz LnchPk BR* 5J	$2,211,801	.08%	30,015	.05%
	Pear 6oz LnchPk LS 5J	$2,040,729	.07%	27,592	.05%
	Applesauce 12oz PL* 5J	$1,789,983	.07%	58,893	.10%
	Peach Slcs LS 12oz BR* 5J	$1,539,818	.06%	43,164	.07%
	FrtCktail LS 12oz PL* 5J	$1,200,760	.04%	40,710	.07%
	FrtCktail LS 12 oz BR* 5J	$1,139,331	.04%	30,599	.05%
	FrtCktail 6oz LnchPk BR* 5J	$1,076,897	.04%	14,521	.03%
	Pear Hlvs LS 12oz PL* 5J	$1,046,047	.04%	35,182	.06%
	Pear Slcs LS 12 oz BR* 5J	$948,932	.03%	25,587	.04%
	FrtCktail HS 12 oz BR* 5J	$878,088	.03%	24,275	.04%
	Wilder Foods -- St Louis MO WOJ Total	**$13,872,387**	**.51%**	**330,537**	**.57%**
Wilder Foods -- St Louis MO WOI	Peach 6oz LnchPk BR* 5I	$2,088,923	.08%	28,347	.05%
	Pear 6oz LnchPk LS 5I	$1,927,355	.07%	26,050	.05%

OR

1. Drill down using the view explorer drag and drop functionality.

- Drag a level from view explorer into the grid and drop it onto a header cell in columns or rows.
- The next level to display when the grid is refreshed will be the one you dropped into the view rather than the one pre-defined as the next drill down level for the view.
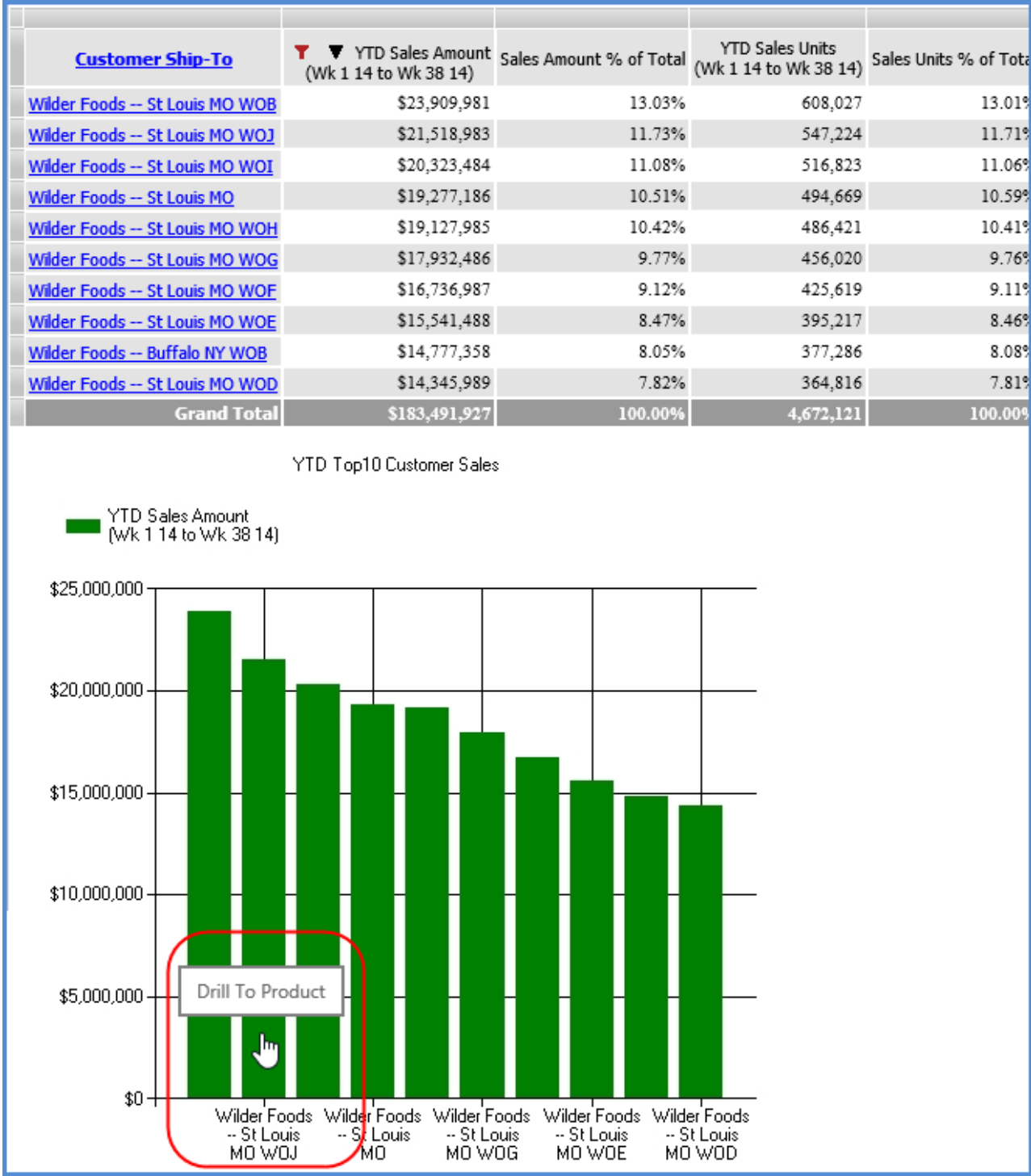
In the example below, Product Family was clicked and dragged onto the Customer Ship to header cell. The drill down was performed for each member of the Customer Ship to level.

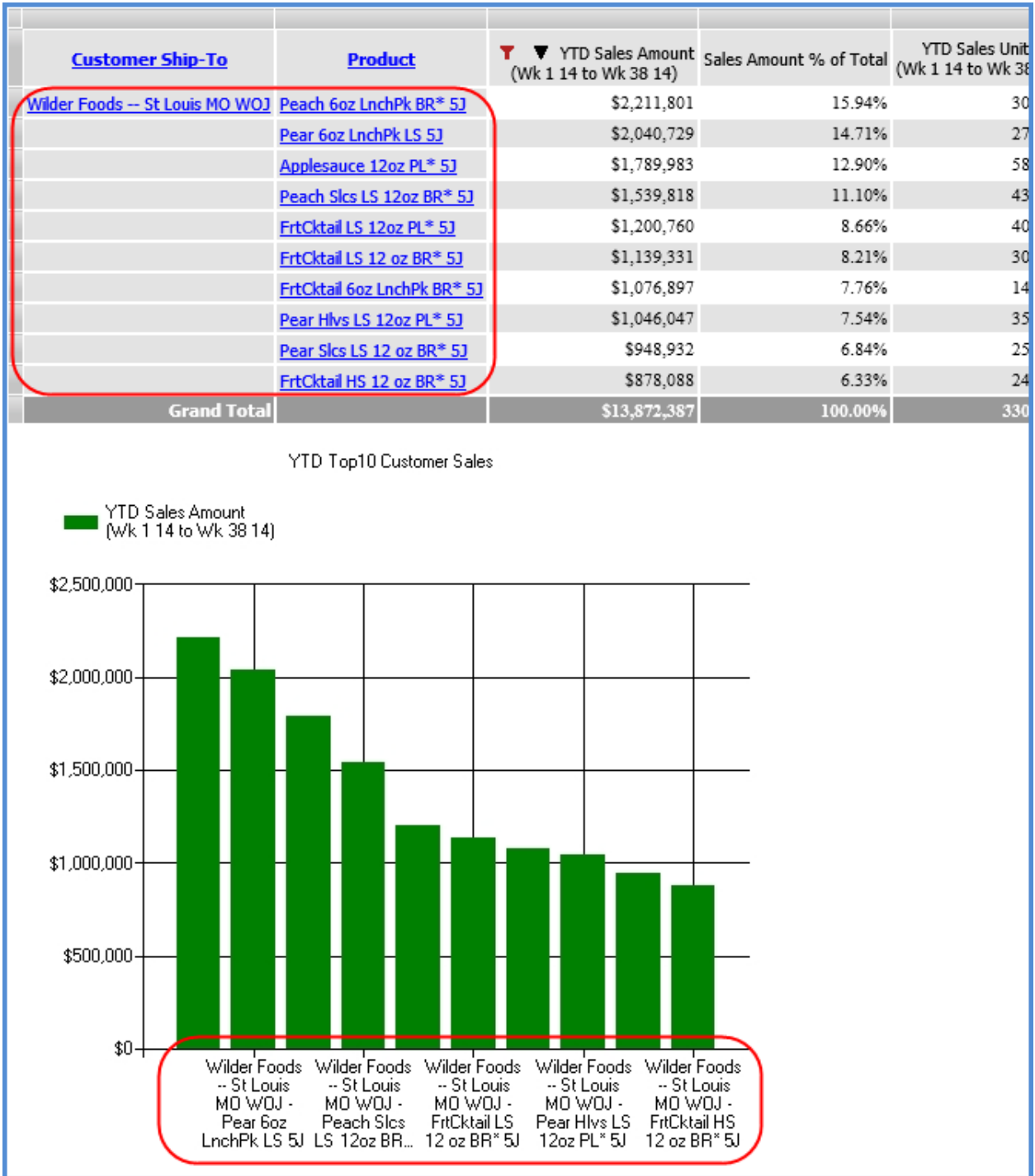| Customer Ship-To	Product Family	▼ YTD Sales Amount (Wk 1 14 to Wk 38 14)	Sales Amount % of Total	YTD Sales Units (Wk 1 14 to Wk 38 14)	Sales Units % of Total
Wilder Foods -- St Louis MO WOB	Peaches	$8,858,006	.27%	212,290	.29
	Fruit Cocktail	$5,614,933	.17%	149,841	.21
	Pears	$5,063,017	.15%	113,146	.16
	Applesauce	$2,663,523	.08%	85,283	.12
	Fruit Fillings	$826,707	.02%	28,578	.04
	Specialty Canned Fruit	$766,722	.02%	15,331	.02
	Hardy Fruits	$117,074	.00%	3,557	.00
	Wilder Foods -- St Louis MO WOB Total	**$23,909,981**	**.72%**	**608,027**	**.83**
Wilder Foods -- St Louis MO WOJ	Peaches	$7,972,205	.24%	191,061	.26
	Fruit Cocktail	$5,053,440	.15%	134,857	.18
	Pears	$4,556,715	.14%	101,832	.14
	Applesauce	$2,397,170	.07%	76,755	.11
	Fruit Fillings	$744,036	.02%	25,720	.04
	Specialty Canned Fruit	$690,050	.02%	13,798	.02
	Hardy Fruits	$105,367	.00%	3,201	.00
	Wilder Foods -- St Louis MO WOJ Total	**$21,518,983**	**.65%**	**547,224**	**.75**
Wilder Foods -- St Louis MO WOI	Peaches	$7,529,305	.23%	180,447	.25
	Fruit Cocktail	$4,772,693	.14%	127,365	.17
	Pears	$4,303,564	.13%	96,174	.13

Drill Within a Chart

You can drill-down within a chart just like you can within a view grid. If a drill-down is available, a pop-up label informs you of the drill to level.

- Click on the series within the chart and the drill will be performed.
- When you drill-down within a chart, the drill down is also performed on the view grid.

Customer Ship-To	▼ YTD Sales Amount (Wk 1 14 to Wk 38 14)	Sales Amount % of Total	YTD Sales Units (Wk 1 14 to Wk 38 14)	Sales Units % of Total
Wilder Foods -- St Louis MO WOB	$23,909,981	13.03%	608,027	13.01%
Wilder Foods -- St Louis MO WOJ	$21,518,983	11.73%	547,224	11.71%
Wilder Foods -- St Louis MO WOI	$20,323,484	11.08%	516,823	11.06%
Wilder Foods -- St Louis MO	$19,277,186	10.51%	494,669	10.59%
Wilder Foods -- St Louis MO WOH	$19,127,985	10.42%	486,421	10.41%
Wilder Foods -- St Louis MO WOG	$17,932,486	9.77%	456,020	9.76%
Wilder Foods -- St Louis MO WOF	$16,736,987	9.12%	425,619	9.11%
Wilder Foods -- St Louis MO WOE	$15,541,488	8.47%	395,217	8.46%
Wilder Foods -- Buffalo NY WOB	$14,777,358	8.05%	377,286	8.08%
Wilder Foods -- St Louis MO WOD	$14,345,989	7.82%	364,816	7.81%
Grand Total	$183,491,927	100.00%	4,672,121	100.00%

When you drill-down within a chart, the drill down is also performed on the view grid. The following image shows the results in the chart and grid from the drill-down on the "Wilder Foods – St. Louis MO WOJ" Customer Ship-To.

Customer Ship-To	Product	▼ ▼ YTD Sales Amount (Wk 1 14 to Wk 38 14)	Sales Amount % of Total	YTD Sales Unit (Wk 1 14 to Wk 38
Wilder Foods -- St Louis MO WOJ	Peach 6oz LnchPk BR* 5J	$2,211,801	15.94%	30
	Pear 6oz LnchPk LS 5J	$2,040,729	14.71%	27
	Applesauce 12oz PL* 5J	$1,789,983	12.90%	58
	Peach Slcs LS 12oz BR* 5J	$1,539,818	11.10%	43
	FrtCktail LS 12oz PL* 5J	$1,200,760	8.66%	40
	FrtCktail LS 12 oz BR* 5J	$1,139,331	8.21%	30
	FrtCktail 6oz LnchPk BR* 5J	$1,076,897	7.76%	14
	Pear Hlvs LS 12oz PL* 5J	$1,046,047	7.54%	35
	Pear Slcs LS 12 oz BR* 5J	$948,932	6.84%	25
	FrtCktail HS 12 oz BR* 5J	$878,088	6.33%	24
Grand Total		$13,872,387	100.00%	330

Edit the Order of View Objects Using Drag and Drop

Steps for:

- Measure Items
- Levels
- Attribute Relationships

Measure Items

1. In the grid or view explorer, click the caption of the measure item that you want to move and continue holding down the mouse button to display this symbol 🔲 followed by the caption.

2. Drag the measure item to the new location and release the mouse button to drop it in that location.

    - If you drop it on the caption of another measure item, it will be positioned *after* that other measure item.
    - If you are working in the grid and want to position the measure item *first* on the measure items axis:

        - If measure items are on columns, drop it on the last header cell on rows.
        - If measure items are on rows, drop it on the last header cell on columns.

      OR

    - If you are working in view explorer and want to position the measure item *first* on the measure items axis, drop it on the Measure Items folder.

Note: If you are working with distinct calculated measure items, you will be permitted to only drop the items before or after all regular or calculated measure items.

Levels

In the Grid

1. Click the name of the level that you want to move and continue holding down the mouse button to display this symbol 🔲 followed by the name.

2. Drag the level to the new location and release the mouse button to drop it in that location.

    - If you drop it on the name of another level, it will be positioned *after* that other level. You may need to do some drilling down before your drag and drop if other levels are not yet visible.
    - If you drop it on the detail cell (member) of another level, it will be positioned *after* that other level and drilled down on by that member.
    - To position it *first* on rows or columns, drag it over one of the shaded, selector cells that exist around the border of the grid, and drop it there.
    - To position it *first* in the View Filter section, drag it over the section header and drop it there.

In View Explorer

1. Click the name of the level that you want to move or click the name of its hierarchy and continue holding down the mouse button to display this symbol 🔲 followed by the name.

2. Drag the level or its hierarchy to the new location in the Rows, Columns, or View Filter folder and release the mouse button to drop it in that location.

- To position it *after* another level, drag it over the name of the hierarchy for that other level and drop it there.

- To position it *first* before all other hierarchies and levels in a folder, drag it over the folder name (Rows, Columns, or View Filter) and drop it there.

Attribute Relationships

1. In the grid or view explorer, click the name of the attribute relationship that you want to move and continue holding down the mouse button to display this symbol followed by the name.

2. Drag the attribute relationship to the new location and release the mouse button to drop it in that location.

- If you drop it on the name of another attribute relationship within a level, it will be positioned *after* that other attribute relationship.
- To position the attribute relationship *first* before all other attribute relationships for a level, work from within view explorer and drop it on its level name.

Email a View

1. From the grid toolbar, click Email View .

2. Set up the email in the Email View window.

   a. Specify email recipients using either of these methods:

   - Click the Address Book button to use the Address Book window.
   - Manually type addresses into the desired To, Cc, and Bcc fields of the Email View window. If you enter multiple addresses, use a semicolon or comma to separate them.

   b. Select the Copy Me checkbox to send yourself a copy.

   c. Select the Include Link to have a link to the view displayed in the sent email.

   d. Optionally customize the Subject field and body text.

3. Click the Send button.

Note: If there are pending planning changes in the view at the time of emailing it, pending changes will not be reflected in the email results. If you want changes to be reflected, process them before sending the email.

Export to Excel

1. From the grid toolbar, click Export to Excel .

   OR

1. Right-click the view name in the grid and select Excel from the pop-up menu.
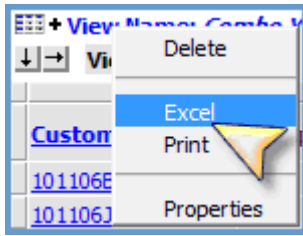
2. Once the export file has been created, you will be prompted to open or save the file.

Note: If there are pending planning changes in the view at the time of exporting it, pending changes will not be reflected in the exported Excel results. If you want changes to be reflected, process them before exporting the view.

Run a View

From the Left Panel

1. Open the view group for the view.

2. Click the view name.

   OR

2. Right-click the view name and select Run.

From the View List Window

1. Click View in the Admin view group.

2. Double-click the view name in the View list window.

   OR

2. Click the view name and then click Run .

Run a View with Parameters

A View Prompt window displays when you run a view that has parameters:

1. Select a parameter for a parameter group.

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

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

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

4. Repeat steps 1 and 2 for any additional parameters groups that display in the window.

5. If there is a Presentation section in the View Prompt window, select the type of format to run view results in -- either Viewer or Excel.

6. Click OK.

OR

1. If default values already display in a parameter's field, you can run the view with the defaults by selecting that parameter for its group and clicking OK.

OR

1. If parameters are optional, you can click OK without specifying any parameter values. If a parameter in any parameter group is required, the View Prompt window will remain open and you will be prompted to choose a parameter.

Transpose a View

1. Right-click in the grid.

2. Select Transpose.

Use Grid Pop-up Menus as Task Shortcuts

1. Right-click in the grid area or on one of the following types of objects in the grid to display a pop-up menu of available tasks such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth.

   - Attribute relationships
   - Axis (rows ⤓ or columns ⇥)
   - Levels
   - Measure item caption (in a detail row or column, or in a Grand Total row or column)
   - View filter
   - View name

2. Choose a pop-up menu option to execute the related task. See Grid Pop-Up Menus for detailed descriptions of menus and options.

   - In some cases, the view will be refreshed immediately based on your choice, such as for a Transpose or Hide task. In other cases, you may need to select an option from a sub-menu that displays, such as for an Insert, Sort, or Filter task.
   - When there are additional choices to make or properties to set up, the relevant window(s) for completing the task will be displayed after you have selected the pop-up menu option – such as for Filter and Edit Rows, Columns, or View Filter tasks.

Use "Save As" to Create a New View

1. Click Save As [icon] in the existing view.

2. Set up properties for the new view in the Save View As window.

   a. Description is optional.

   b. Type can be set to Personal or Shared, with administrators also being able to set the Type to Global. See also View Types and Recommendations.

   c. You can select one or more view groups for the new view.

   d. Use the Presentation Type drop-down list to determine what format the view will display in when it is run – either Viewer (grid) or Excel.

   e. Parameter Prompting only displays if there are parameters in the existing view. De-select the option if you do not want the parameters to be carried over to the new view.

3. Click Save in the Save View As window.

Use Sort and Filter Icons as Task Shortcuts

Sort with Icon

If a sort has been applied to any measure item, level value, level attribute relationship, or Grand Total; the sort icon ▲ or ▼ displays in the header cell for the item. Click the sort icon to reverse the sort. A pop-up label displays the sort details when the cursor is moved over the sort icon.

> ▲ = ascending sort

> ▼ = descending sort

Filter with Icon

If a filter has been applied, the filter icon ▼ displays in the header cell for the item. Click the filter icon to open the applicable filter window for the type of item you are filtering, and make your edits. A pop-up label displays the filter details when the cursor is moved over the filter icon.

Use View Explorer Pop-up Menus as Task Shortcuts

1. Right-click one of the following types of objects in view explorer to display a pop-up menu of available tasks related to that object or to access the Properties window for the object.

   - View name folder
   - Parameter Groups folder or individual parameters
   - Grid folder
   - Rows, Columns, or View Filter folder or their hierarchies, levels, or attribute relationships
   - Measure Items folder or individual measure items
   - Presentation folder
   - Charts folder or individual charts

2. Choose a pop-up menu option to execute the desired task.

   - See View Explorer Pop-Up Menus for detailed descriptions of menus and options.
   - When there are additional choices to make or properties to set up, the relevant window(s) for completing the task will be displayed after you have selected the pop-up menu option – such as for Edit Rows, Columns, or View Filter tasks or Insert Regular Measure Item tasks.

Address Book Window

1	**Find names in:** - Use the drop-down selection list in combination with sections 2 and 3 of this window to search for email recipients. Use the list to identify the group of email recipients to review. • **Global Address List** - search the Global Address Book residing on your Microsoft Exchange Server • **All Users –** search all users. • **All Groups –** search all groups. • **All Contacts –** search all defined contacts. • **Viewer User Profiles –** search all user profiles. • **Viewer User Profile Groups** – search all user profile groups.
2	**Display name:** - Names can be searched for and selected in the window to determine the To, Cc, and Bcc recipients of an e-mail. These fields can optionally be used to enter criteria for searching for names from the list selected in the Find names in drop-down selection list. When Viewer User Profile Groups is selected, only the Display name field is enabled. Otherwise all three fields are enabled. **First name** – To further filter your search, enter a first name or even the first letter of the name. That

	populates the search results area with recipients with that first name or names beginning with that letter of the first name. **Last name** – To further filter your search, enter a last name or even the first letter of the name. That populates the search results area with recipients with that last name or beginning with that letter of the last name.
③	**Find** - After entering search criteria, click Find and results will be returned in the lower, left portion of the window. If the fields are left blank, all names in the identified group will be returned once the Find button is clicked.
④	Search results area is populated with names once Find is clicked. Highlight name(s) to select and click the right facing arrow [-->] to select the name (s) for the To, Cc, or Bcc in email addresses.
⑤	You must specify a To recipient. The Cc and Bcc fields are optional. **To:** - To select a name for the To recipient list, click it in the search results section and click the right facing arrow next to the To field. To remove a name, click it in the To field and click the left facing arrow [<--] next to the field. **Cc:** - To select a name for the Cc recipient list, click it in the search results section and click the right facing arrow next to the Cc field. To remove a name, click it in the Cc field and click the left facing arrow next to the field. **Bcc:** - To select a name for the Bcc recipient list, click it in the search results section and click the right facing arrow next to the Bcc field. To remove a name, click it in the Bcc field and click the left facing arrow next to the field.

Email View Window

1	Access the Address Book window to select email recipients, or manually type in the addresses. • You must specify a To recipient. The Cc and Bcc fields are optional. • If you manually type in multiple addresses, use a semicolon or comma to separate them.
2	**Copy Me and Include Link -** • **Copy Me** - Select this option if you want to receive a copy of the email. • **Include Link** - If the recipient of the email is a Stratum.Viewer user and you want them to be able to run the view from the email, select the Include Link option. The link will display in the body of the sent email.
3	**Subject and Body** - You can optionally customize the subject line and enter body text for the email. • Subject defaults to the text "View:" followed by the view name. • If the view has a description associated with it, the body of the email will default to that description. The body/content of the sent email will automatically display the currently visible rows, columns, and charts for the view. The view needs to be in expanded mode if you want to email all rows and columns.

Export to Excel Open / Save Prompt

Do you want to open or save **Combo YTD Chart 2014-08-06.xlsx** (123 KB) from **devenv-t2**?   **1** Open   **2** Save ▾   Cancel   ✕
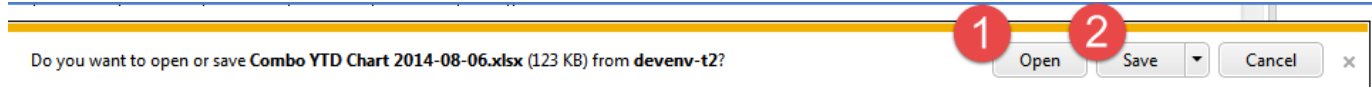
1	**Open** - Opens the file as a Microsoft Excel workbook. Grid data and charts display as separate worksheets within the workbook.
2	**Save / Save As** – Identify the file save location.

Export to Excel Worksheets

These examples show how view data is exported to Excel. This view has both a grid and a chart included.

Customer Ship-To	▼ Actual Sales Sales Amount Jan 14 to Sep 14	Actual Sales Sales Amount Jan 13 to Sep 13	Actual Sales Sales Units Jan 14 to Sep 14	Actual Sales Sales Units Jan 13 to Sep 13
101106BEWO	$25,198,711	$43,330,251	635,160	899,662
101106JEWO	$22,678,840	$38,997,226	571,644	809,696
101106IEWO	$21,418,904	$36,830,714	539,886	764,713
101106	$20,333,717	$34,696,109	516,836	736,359
101106HEWO	$20,158,969	$34,664,201	508,128	719,730
101106GEWO	$18,899,033	$32,497,688	476,370	674,747
101106FEWO	$17,639,098	$30,331,176	444,612	629,764
101106EEWO	$16,379,162	$28,164,663	412,854	584,781
101103BEWO	$15,498,569	$26,716,416	392,702	557,943
101106DEWO	$15,119,227	$25,998,151	381,096	539,797
Grand Total	**$193,324,230**	**$332,226,595**	**4,879,289**	**6,917,192**

YTD Sales Compared to Previous Month YTD

The file name contains the view name and date of the export. The grid is displayed starting in the first cell of the Excel worksheet. The worksheet that contains the contents of the grid is named Data –" view name." All rows and columns of the view are exported. If the grid is not visible in the view, then it will not be included in the export file.

Customer Ship-To	Actual Sales Sales Amount Jan 14 to Sep 14	Actual Sales Sales Amount Jan 13 to Sep 13	Actual Sales Sales Units Jan 14 to Sep 14	Actual Sales Sales Units Jan 13 to Sep 13
101106BEWO	$25,198,711	$43,330,251	635,160	899,662
101106JEWO	$22,678,840	$38,997,226	571,644	809,696
101106IEWO	$21,418,904	$36,830,714	539,886	764,713
101106	$20,333,717	$34,696,109	516,836	736,359
101106HEWO	$20,158,969	$34,664,201	508,128	719,730
101106GEWO	$18,899,033	$32,497,688	476,370	674,747
101106FEWO	$17,639,098	$30,331,176	444,612	629,764
101106EEWO	$16,379,162	$28,164,663	412,854	584,781
101103BEWO	$15,498,569	$26,716,416	392,702	557,943
101106DEWO	$15,119,227	$25,998,151	381,096	539,797
Grand Total	$193,324,230	$332,226,595	4,879,289	6,917,192

The worksheet that contains the charts associated with the view is named Chart – "View Name". The chart is an embedded image in a separate worksheet and displays the identical size of the chart(s) in the view. If there were more than one chart, they would all display as one image on the chart worksheet.
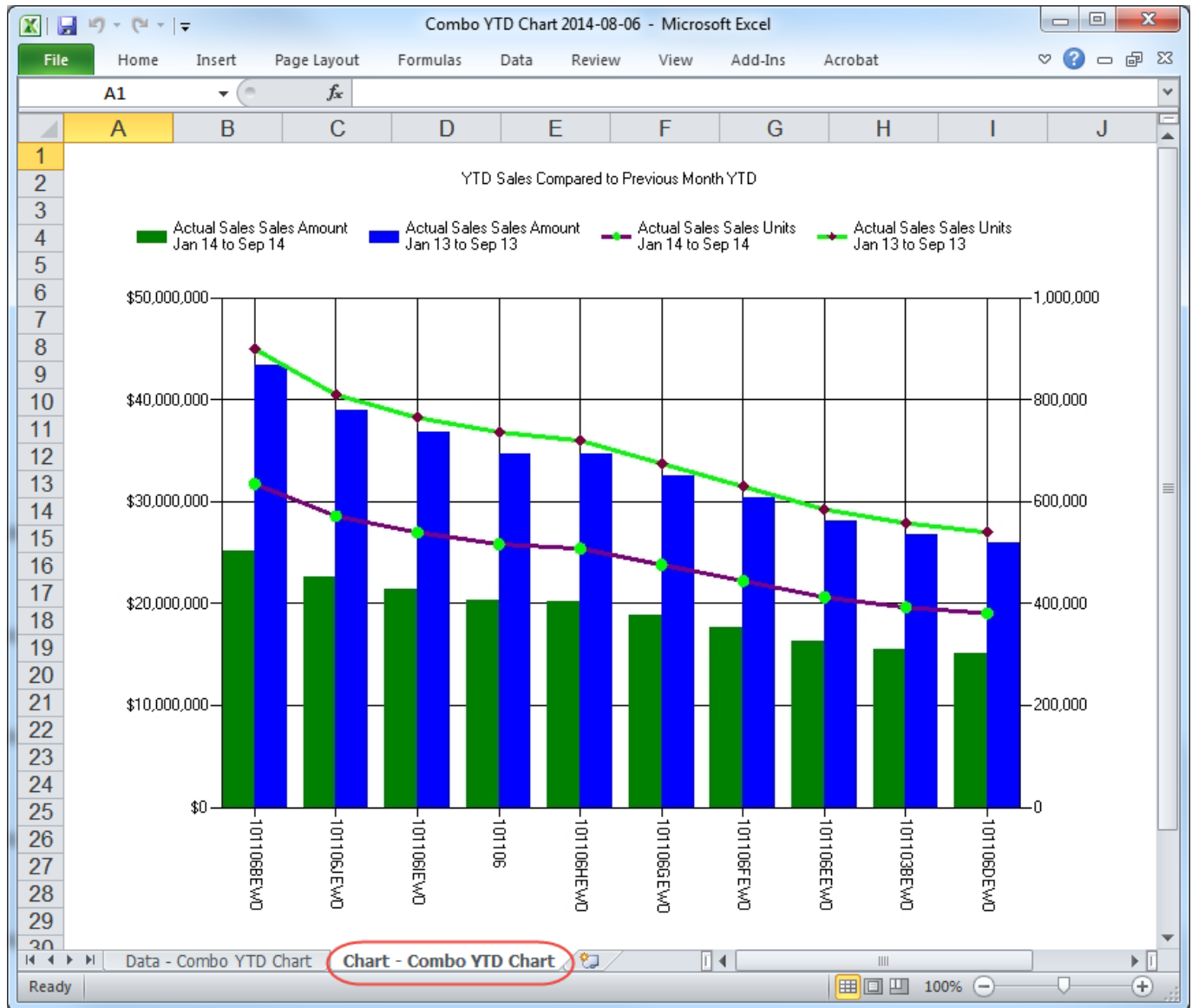
Note: When exporting view data into Excel, only the values, images, and conditional formatting will be brought into the workbook. For example, any sorted or filtered data in the view will be carried over in that state to the worksheet but the Stratum.Viewer sort and filter functionality and icons will not be carried over. You will need to use Excel sort and filter functionality if you want to modify the data further in the worksheet. Any value such as subtotals, grand totals, calculated measures, etc, will not be a formula but simply the value displayed within Stratum.Viewer.

Grid

Rows and Columns - The grid displays levels along the rows and columns axis. You can create views with levels on one axis (rows or columns) or levels on both axes.

- Ⓐ **Header Cells -** Header cells contain names of levels and attribute relationships. In the above image, the row levels are Region and Customer Ship-To. The column level is Sales Dir. The other header cells are for their attribute relationships that were selected for display in the view.

- Ⓑ **Detail Cells -** Detail cells contain level member and attribute relationship values. In this example, the member values for first level on rows are 330 and 331. That set of cells is known as the display text. Next are the values for the Rgn Long Description attribute relationship. You have the option of designating an attribute relationship as the display text rather than the member value. The detail cells on the columns axis show the 231 member and Helen Briggs attribute relationship value.

- **Pop-up Menus -** Right-click objects to display actions that you can take related to that object or axis, such as editing hierarchies. See Grid Pop-up Menus.

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

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

See Drill Up or Down Within a View.

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

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

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

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

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

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

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

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

View Name - Displays the view name. Right-click to display actions that you can take related to the overall grid, such as exporting to excel. See Grid Pop-up Menus.

Expand View ⊞+ **or Collapse View** ⊞- **-** In collapsed mode, the grid displays a select number of rows and columns per page. The number of rows or columns that display per page is controlled by your administrator, but you can customize the setting with an Override View Page Size setting in your User Options. In expanded mode, all rows and columns are displayed. If you want to change the mode, click this toggle. The collapsed mode is recommended for views with large row and

column counts.

Axis Icons - An icon exists for rows ⬇ and columns ➡.

- **Pop-up Menus** - Right-click to display actions that you can take related to that axis, such as controlling the display of totals by axis. See Grid Pop-up Menus.

- **Filter Icons** - Icons ▼ display next to an axis that has been filtered. Pop-up labels display the filter details when the cursor is moved over the icon. See also Use Sort and Filter Icons as Task Shortcuts.

View Filter - If you used this section to apply a filter to the entire grid, levels used in the filter will display here.

- **Pop-up Menus -** Right-click the View Filter header or levels in it to display actions that you can take related to that object or section of the grid, such as filtering levels in that section. See Grid Pop-up Menus.

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

- **Filter Icons** - Icons display next to levels that have been filtered ▼. Pop-up labels display the filter details when the cursor is moved over the icon. See also Use Sort and Filter Icons as Task Shortcuts.
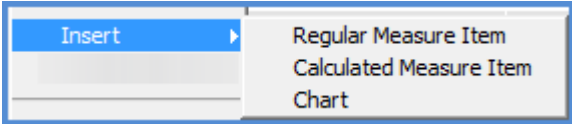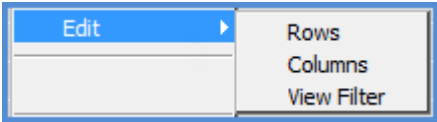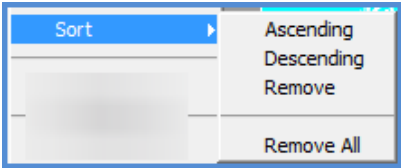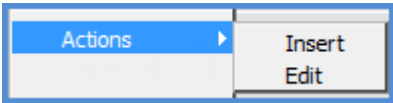
Grid Pop-up Menus

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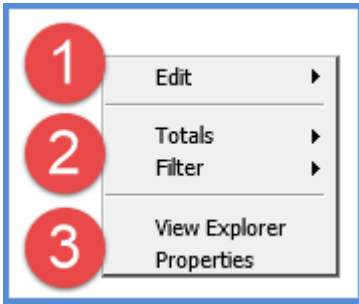
Attribute Relationships Pop-up Menu

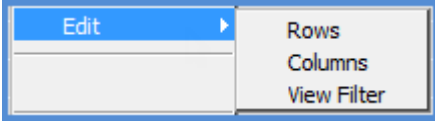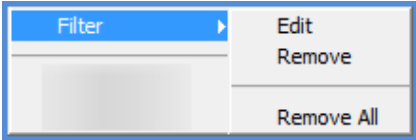Right-click an attribute relationship to display actions that you can take related to that object or axis.

①	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. **Select All -** Use this option to select the entire grid.
②	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart. Insert ▶ Regular Measure Item / Calculated Measure Item / Chart **Edit** - Edit the hierarchies on the rows, columns, or view filter. Edit ▶ Rows / Columns / View Filter
③	**Hide** - When an attribute relationship is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the attribute relationship changes to No. From view explorer, you can drag an attribute relationship back in the grid if needed, or you can change the Visible property to Yes.
④	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All. Sort ▶ Ascending / Descending / Remove / Remove All
⑤	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions. Actions ▶ Insert / Edit **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
⑥	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties -** Click to maintain the attribute relationship properties including sorting and whether it is visible or not.

Axis Pop-up Menu

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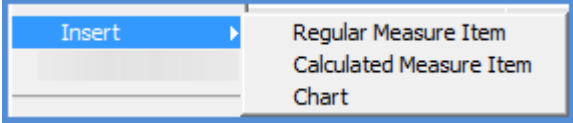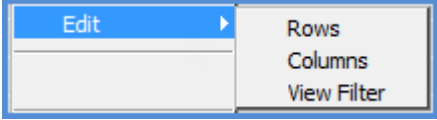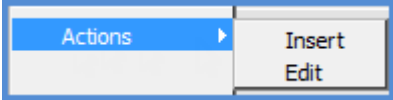

1	**Edit** - Edit the hierarchies on the rows, columns, or view filter.
2	**Totals** - Control whether totals are displayed for all levels on the axis by choosing Yes or No. The Totals Default property in the Properties window for the axis also changes to reflect your choice, as does the Totals property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

General Pop-up Menu

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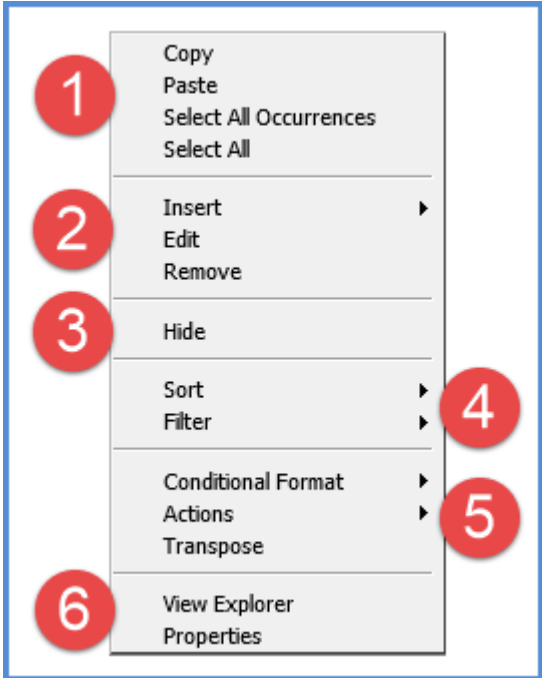

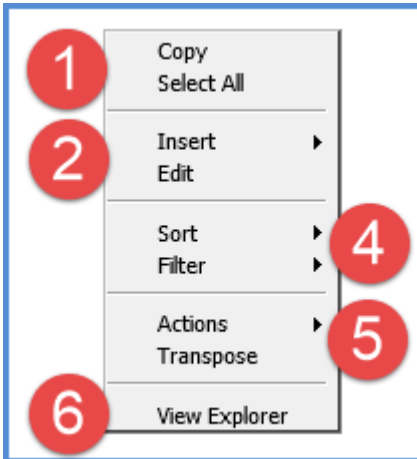|	
1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning

	enabled views. **Select All** - Use this option to select the entire grid.

2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.
	
	Insert ▸ Regular Measure Item
	           Calculated Measure Item
	           Chart
	
	Edit - Edit the hierarchies on the rows, columns, or view filter.
	
	Edit ▸ Rows
	        Columns
	        View Filter

3	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions. Actions ▸ Insert Edit **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.
4	**View Explorer -** This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.

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

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

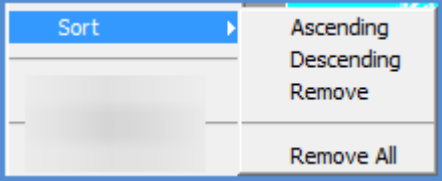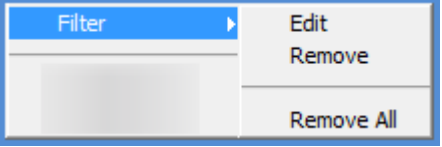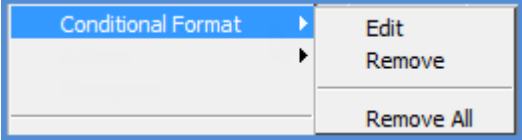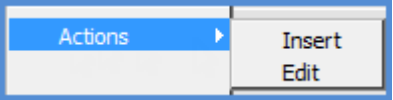|	
1	Copy Paste Select All Occurrences Select All
2	Insert ▸ Edit Remove
3	Hide
4	Sort ▸ Filter ▸
5	Conditional Format ▸ Actions ▸ Transpose
6	View Explorer Properties

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

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

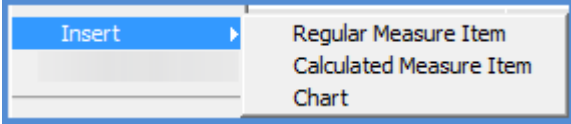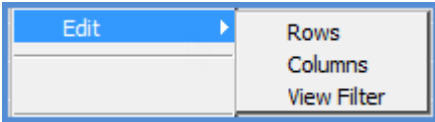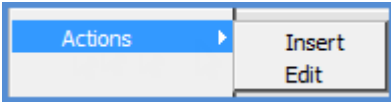|	
1	**Copy** - This option allows you to copy sections of a view that you have selected.
	Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. This option does not display on the menu for Grand Totals.
	Select All Occurrences - Use this option to select data for all occurrences of that measure item in the active page of the View. This option does not display on the menu for Grand Totals.
	Select All - Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.
	Edit - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens the Expression window so you can edit the measure item expression.
	Note: Another way to access the Edit Measure Item window or Expression window is to double-click the caption of the respective regular or calculated measure item.
	Remove - Removes the measure item from the view definition without confirmation. It will no longer display in the view explorer. This option does not display on the menu for Grand Totals.
3	**Hide** - When a measure item is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the measure item changes to No. From view explorer, you can drag a measure item back in the grid if needed, or you can change the Visible property to Yes. This option does not display on the menu for Grand Totals.
4	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All.

Filter - Filter options are Edit, Remove, and Remove All.

	Conditional Format – Use this option to edit or add conditional formatting on the measure item, There are also options for removing the conditional format on the active measure item or all measure items. This option does not display on the menu for Grand Totals. **Actions** – Use this option to insert new actions or to edit, process, or delete existing actions. **Transpose** - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
	View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties -** Click to maintain the measure item properties including the name, caption expression, type, pop-up labels, hyperlinks, and so forth. This option does not display on the menu for Grand Totals.

View Filter Pop-up Menu

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

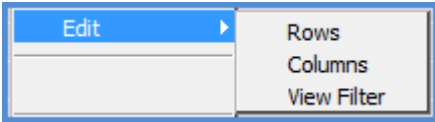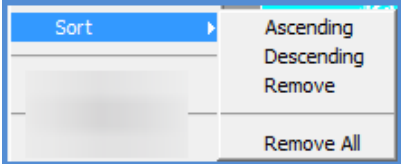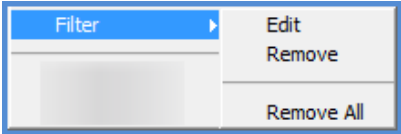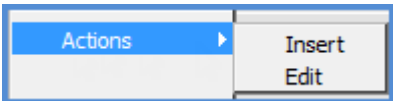|	
	Copy - This option allows you to copy sections of a view that you have selected.

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

Levels Pop-up Menu

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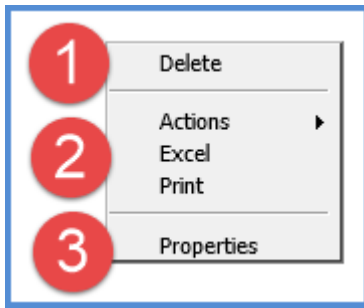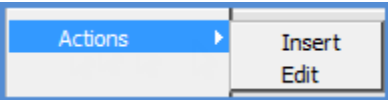

1	**Copy** - This option allows you to copy sections of a view that you have selected.
	Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.

	Select All - Use this option to select the entire grid.
2	**Insert** - The sub menu has options for Regular Measure Item, Calculated Measure Item, and Chart. The Insert Measure Item window will automatically refresh the grid when it is closed. The Charting Data Wizard will display when inserting a new chart.
	Insert ▶ Regular Measure Item / Calculated Measure Item / Chart
	Edit - Edit the hierarchies on the rows, columns, or view filter.
	Edit ▶ Rows / Columns / View Filter
3	**Hide** - When a level is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the level changes to No. From view explorer, you can drag a level back in the grid if needed, or you can change the Visible property to Yes.
4	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All.
	Sort ▶ Ascending / Descending / Remove / Remove All
	Filter - Filter options are Edit, Remove, and Remove All.
	Filter ▶ Edit / Remove / Remove All
5	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.
	Actions ▶ Insert / Edit
	Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.
6	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.
	Properties - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text.

View Name Pop-up Menu

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

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

Grid Toolbar

1	**Toolbar Icons -**
	• **Save** ⊟ **and Save As** ⊕ - Click the respective buttons to save the active view or create a new view from the active view. The Save button will be disabled in certain cases, such as for users who are running global views and have a casual or advanced level of access for the application. Those users cannot save changes to global views, but they can use the Save As button to save changed views as shared views or their own personal views.
	• **Print** ⊟ - Click to print the active page of the view.
	• **Export to Excel** ⊞ - Click to initiate an export of the view and chart to Microsoft Excel.
	• **Email View** ✉ - Click to access the window for emailing views.
	• **Show / Hide View Explorer** ⊡ - Click to show or hide view explorer. This button does not display if you have a casual level of access for the application.
	• **Show Prompt Window** ⬉ - Click to access the View Prompt window for parameters. This button only displays if parameters exist for the view.
	• **Insert New Chart** ⊪ - Click to access a wizard for creating charts for the active view.
	• **Execute the Update Plan Process** ↻ - This icon only displays in the toolbar if the Planning property for the view is set to Yes. After making planning changes in a view, click this icon to update the Analysis Services and Stratum storage databases for your environment with those planning changes.
	• **Help** ⊙ - Click to access help that is specific to working in views.
2	**Paging Controls** - Use the rows and columns paging arrows to move between pages of multi-page views. Controls are active only when there are multiple pages to scroll through on rows and columns respectively.
3	**Presentation Drop-down List** – Use to change the format in which the view displays. When Viewer is selected, the view displays in the traditional grid format. When Excel is selected the View Definition window will display in the background while the view opens as an MS Excel file. A File Download window will prompt you to open or save the file.

Measure Item Filter Window

(1)	**Operator list** - Choose what type of filter to apply, such as greater than or less than, top / bottom, recursive top / bottom, or overall top / bottom filters
(2)	**Value list** - Type in the numeric value by which to filter the measure.

Properties Window for a View

1	**Name and Description** - Specify the name for the view, and optionally specify a description.
2	**Type** - Choose from Global, Shared, or Personal to control the view type. The Global option is only available for view or security administrators. **Owner** – This property is available to view and security administrators. They can use it to select a different owner for the view. See also Change the Owner of a View. **Planning** – If you intend to set up this view as a planning view for users, the Planning property must be set to Yes. Once all other requirements for planning are met in the view, planning icons will display next to measure items that are update enabled for the users.
3	**View Group** - Select one or more view groups in which the view will appear. You can use Ctrl+Click and Shift+Click when selecting more than one group. Administrators can choose from any groups that exist in Stratum.Viewer. Users with a casual or advanced access level can choose from groups enabled for their user profile group.
4	**Server, Database, and Cube** - These are read only fields that display information about the cube associated with the view.

Save View As Window

1	**Name and Description** - Specify the name for the new view, and optionally specify a description.
2	**Type** - Choose from Global, Shared, or Personal to control the view type. The Global option is only available for view and security administrators. **Owner** – This property is available to view and security administrators. They can use it to select a different owner for the view. See also Change the Owner of a View.
3	**View Groups** - Select one or more view groups in which the view will appear. You can use Ctrl+Click and Shift+Click when selecting more than one group. Administrators can choose from any groups that exist in Stratum.Viewer. Users with a casual or advanced access level can choose from groups enabled for their user profile group.
4	**Presentation Type** - Controls what presentation format the view will run in by default. Set to Viewer for the view to display in the traditional grid format. Set to Excel to have the view open as an MS Excel file.
5	**Parameter Prompting** – If you want the new view to have the same set of parameters as the existing view, leave this option selected. Users of the new view will be prompted to select parameters when they run the view. This option only displays if there are parameters for the existing view from which you are performing the Save As. De-select the option if you do not want the parameters to be saved with the new view. The parameters from the existing view will not carry over to the new view.

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. • **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.

View Explorer

The elements in view explorer are organized into a tree structure that has expandable/collapsible folders. Folders are described in the following table. Color-coding is used throughout to help you distinguish which items will be visible in the grid and which are hidden.

- **Items in blue text** – Any items currently shown in the grid. Their Visible property is "Yes" in their Properties window.

- **Items in black text** – Any items that are not actively shown in the grid, but that have a Visible property of "Yes." This means they will display in the grid once you reach them in the drill down path for the view.

- **Items in grey text** – Any items that have a Visible property of "No." For levels, this means they will not display in the grid as you drill through it. Attribute relationships, measure items, and charts displayed in

grey text also will not display in the grid. You can right-click on them anytime and select Show to make change their Visible property.

When you click an item, it is highlighted in a bright blue box like the view name, "Customer Ship-To Sales," in the above example. When double-clicked, the Properties window of the active item opens at the bottom of the view explorer as shown in the above example. You can also right-click to invoke a pop-up menu of actions to take on items from view explorer.

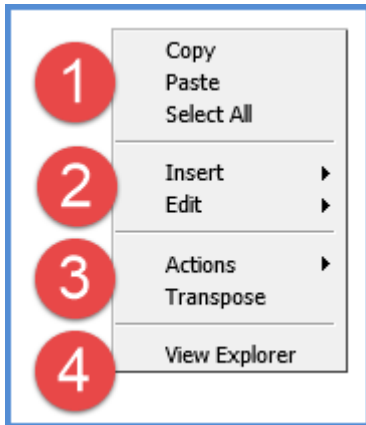|	
1	**View name folder** – displays the name of the view. Double-click to access the Properties window for editing basic properties like the Name, Type, Planning, and View Group properties. Administrators can use the Owner property to change the owner of a view.
2	**Parameter Groups folder** – for parameter groups and parameters within each group. As you insert groups and parameters, they will display under this folder. Each group and parameter has a related Properties window. You can drag and drop groups and parameters within each group to rearrange them.
3	**Grid folder** – The folders for Rows, Columns, View Filters, and Measure Items are organized under the Grid folder. From the Grid folder, you can access a Grid Properties window which determines if the grid is visible and if paging is enabled for the grid display. **Rows and Columns folders** – All of the included levels and attribute relationships, grouped by hierarchy, display appropriately in the Rows and Columns folder. You can move hierarchies along with their levels and attribute relationships between the Rows, Columns, or View Filter by dragging and dropping them within view explorer or into the grid from view explorer. Properties windows exist for hierarchies, levels, and attribute relationships in these folders. Use them to hide or show items, set up filters or sorting, control totals, etc. • **Hierarchies** ↳ – This image displays next to the names of hierarchies. • **Levels** ▪ – Blue boxes next to a level indicate the level it is based for all the levels in its hierarchy. For example, a level with one box next to it would be the first level for its hierarchy. A level with two boxes next to it would be the second level available in its hierarchy, and so forth. • **Attribute Relationships** 🗗 – This image displays next to the names of attribute relationships for levels.
4	**View Filter folder** – Levels included in the view filter. Setting up a view filter requires a level to be in the View Filter section and then applying a filter to that level. Drag or drop the desired level(s) into the View Filter section of the grid or into the View Filter folder of view explorer.
5	**Measure Items folder** – All measure items defined for this view display in the folder. You can edit, insert, remove and hide measure items from this folder. The Time Range controls the type of measure items that you can set up for the view – either measure items with time ranges (Yes) or measure items without time ranges (No). You can also use the Properties windows for individual measure items to change their caption, images, conditional formatting, pop-up labels, hyperlinks, filtering, sorting, totals, etc. • **Regular Measure Item** 🔢 – This image displays next to regular measure items. • **Calculated Measure Item** 🧮 – This image displays next to calculated measure items. • **Distinct Calculated Measure Item** 🧮 – This image displays next to distinct calculated measure Items.
6	**Presentation folder** – The properties for this folder are used to set the default presentation format for the view (either Viewer or Excel) and to determine whether or not users will be prompted to choose the presentation format before the view opens for them. **Chart folder** – The Chart folder displays the names of any charts 📊 that you have created for a view. Charts displayed in blue are currently visible in the grid. Charts displayed in grey are hidden.

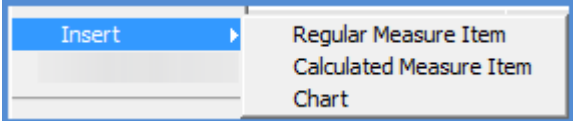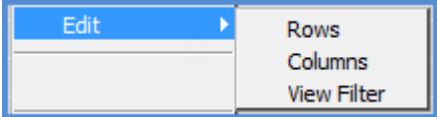| | Charts can be dragged and dropped in the folder to change the order in which they display in the grid. |
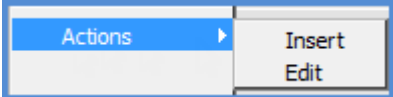
View Explorer Pop-up Menus

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

General Pop-up Menu

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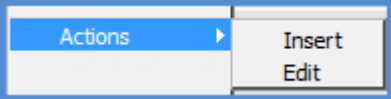
1	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. **Select All** - Use this option to select the entire grid.
2	**Insert** - The sub menu has options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

4	**View Explorer -** This option allows you to open and close view explorer. If a Properties window is open when you close view explorer, the Properties window will also close.

View Name Folder Pop-up Menu

Right-click the view name (or "New View" for views not named yet) to display actions you can take.
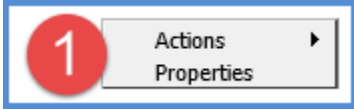
1	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions. **Properties** – Click to maintain overall view properties such as the name, description, and view group.

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

Right-click the Parameter Groups folder and select Insert to insert a new group.
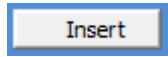
Right-click the name of a parameter group to display actions that you can take on the group, which include inserting a parameter, removing the group, or maintaining the properties for the group.
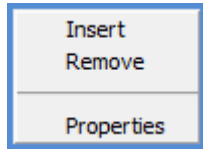
Right-click a parameter within a group to display actions that you can take on the parameter, which include removing it or maintaining its properties.
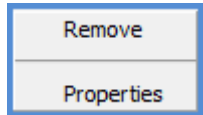
Grid Folder Pop-up Menu

Right-click the Grid folder to display actions that you can take related to the overall grid.
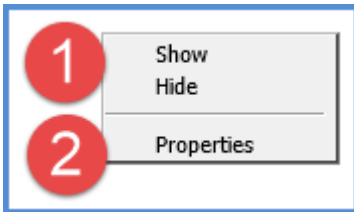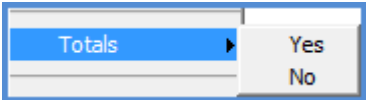
1	**Show or Hide** - Choosing Hide will hide the grid. If a chart is attached and visible, the chart will still show. Choose Show to display the grid again.
2	**Properties -** Click to maintain the grid properties including whether rows and columns display all in a single page or one page at a time.

Rows Folder and Columns Folder Pop-up Menus

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

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

View Filter Folder Pop-up Menu

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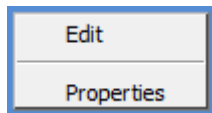
Hierarchies Pop-up Menu

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

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

Levels Pop-up Menu

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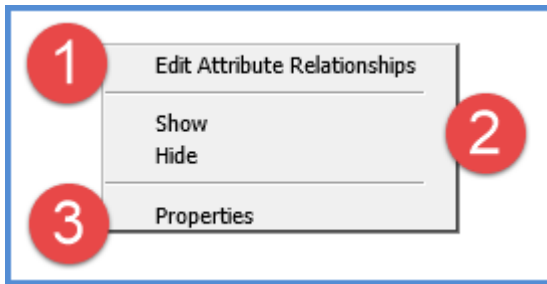
(1)	**Edit Attribute Relationship** - Edit (add or remove) the attribute relationships that will be available in the view for the level.
(2)	**Show or Hide** - Choosing Hide will hide the level. Choose Show to display the level again.
(3)	**Properties -** Click to maintain the level properties including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

Attribute Relationships Pop-up Menu

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

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

Measure Items Folder and Individual Measure Items Pop-up Menus

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

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

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

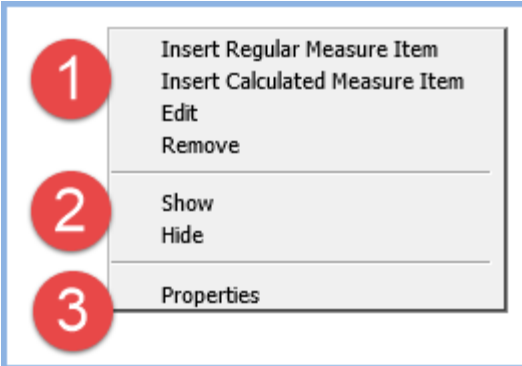|	
1	**Insert Regular Measure Item** - Opens the Insert Measure Item window for inserting a new regular measure items and opens a Properties window for the new measure item. **Insert Calculated Measure Item -** Opens the Expression window for inserting a new calculated measure items and opens a Properties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

Presentation Folder Pop-up Menu

Right-click the Presentation folder display actions you can take on it.
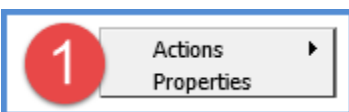
1	**Actions** – Use this option to insert new actions or to edit, process, or delete existing actions.
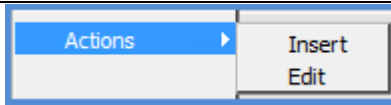
Properties – Click to maintain Presentation properties such as setting the default presentation type to Viewer or Excel.

Charts Folder and Individual Charts Pop-up Menus
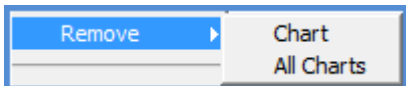
Right-click the Charts folder to display actions that you can take on it.

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

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

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

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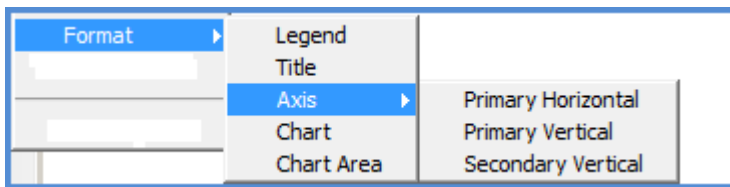
View Prompt Window

1	**Parameter Groups** - You can distinguish each parameter group that exists for a view by the bold name above each group. In this example, there is a group named "RepBrokerType Group" for the RepBroker Type level, and a group named "Product Category Group" for the Product Category level. Each group has its own set of parameters and one parameter per group can be used to filter its respective level in the view.
2	**Individual Parameters** - Parameters in each group have their own radio buttons. Select one to activate that parameter and then specify a value for it (see 3 below). If a default value is associated with a parameter, the value will display in the field next to the parameter. You can leave a parameter set to the default or choose a different value.
3	**Specifying Parameter Values** - Select a parameter's radio button then use the control provided to specify values: • **Drop Down** parameters have a drop-down list. A single member can be selected. • **Member List, User List, and Expression** parameters have a filter icon next to them. Click the icon and use the window that opens to specify the member(s), user list, or expression for the parameter value. You will use the Select or Advanced Select Members window for Member List parameters, Select User List Filter window for User List parameters, and Expression window for Expression parameters. Clicking OK in the filtering window returns the specified member(s), user list, named set, or expression to the parameter's field in the View Prompt window.

4	**Presentation** – This section only displays if you selected the Yes option for the Presentation section's Prompt property. Users can choose to run the view in Viewer (grid) format or as an MS Excel file. If they aren't any parameters defined for the view and Prompt is set to Yes, then the Presentation section will be the only thing that displays in the View Prompt window.
5	**OK and Cancel -** • **OK** - If you specify parameters and click OK, the window closes and the specified parameter values will be applied to filter the view. Filter icons will display next to the filtered levels. You can click OK without specifying any parameters. If none of the parameters are required, the window closes and the view runs without any filtering by parameter. If any of the parameters are required, a prompt will display indicating that you must specify a value for that parameter. • **Cancel** - If you click Cancel, the window closes and the View Definition window displays. You might choose to do this if you decide you want to make edits to the view before running it. Make changes and then access the View Prompt window again to specify parameters and run the view. If the window doesn't open automatically after your editing has been applied to the view, click the Prompt button in the grid toolbar.

Advanced Concepts

Change the Owner of a View

View and security administrators can change the owner of any view. The Select User window is used to change the owner. Options for changing a view owner follow.

Option 1: From the Left Panel

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: From the View List Window

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.

Considerations when Exporting to Excel

Export to Excel functionality exports all rows and columns from a view whether the view is running in the collapsed mode (also known as page mode) or running in expanded mode. Collapsed mode means that only a select number of rows and columns will display per page, as determined by a View Page Size setting that is controlled by either you or your administrator. In the following example, settings are such that 20 rows display per page. Expanded mode means that all rows and columns are displayed. Only 20 of the 15,076 rows of the following view are displayed currently, but all 15,076 rows would be exported.

Keep in mind that if your view has an exceptionally large number of rows and columns, it may take longer to export.

View Name: *Sales & Returns Organized by ABC Class*

View Filter

Product ABC Class	Product	Prod Long Description	SlDir Long Description	231 Helen Briggs	880 Steve Mentas	Grand Total
			Sales Dir >>			
A	620A914003	Applesauce 12oz BR* 0A	Actual Sales Sales Amount Sep 2014 to Sep 2014	$14,010		$14,010
			Actual Sales Sales Return Amount Sep 2014 to Sep 2014	($750)		($750)
			Daily Sales Daily Sales Amount Sep 2014 to Sep 2014	$233		$233
			Daily Sales Daily Sales Units Sep 2014 to Sep 2014	6		6
	620A914422	FrtCktail 6oz LnchPk BR* 0A	Actual Sales Sales Amount Sep 2014 to Sep 2014		$1,609	$1,609
			Actual Sales Sales Return Amount Sep 2014 to Sep 2014		($628)	($628)
			Daily Sales Daily Sales Amount Sep 2014 to Sep 2014		$114	$114
			Daily Sales Daily Sales Units Sep 2014 to Sep 2014		2	2
	620A914615	Blueberries 12oz BR* 0A	Actual Sales Sales Amount Sep 2014 to Sep 2014	$1,553		$1,553
			Actual Sales Sales Return Amount Sep 2014 to Sep 2014	($73)		($73)
			Daily Sales Daily Sales Amount Sep 2014 to Sep 2014	$26		$26
			Daily Sales Daily Sales Units Sep 2014 to Sep 2014	1		1
	620A924001	Pear Hlvs LS 12oz PL* 0A	Actual Sales Sales Amount Sep 2014 to Sep 2014	$3,092		$3,092
			Actual Sales Sales Return Amount Sep 2014 to Sep 2014	($428)		($428)
			Daily Sales Daily Sales Amount Sep 2014 to Sep 2014	$95		$95
			Daily Sales Daily Sales Units			

1 to 20 of 15076   1 to 3 of 3
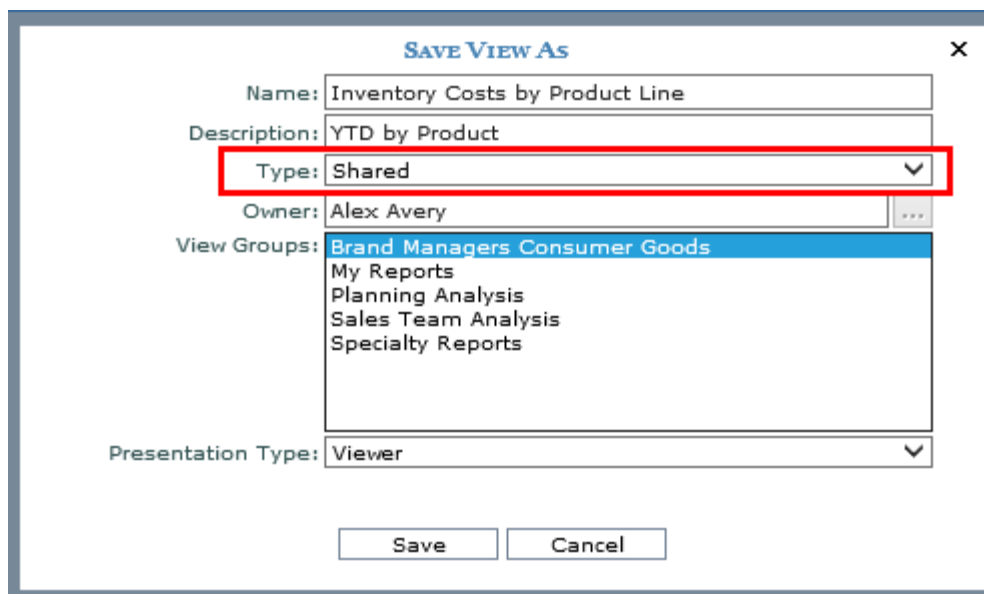
Designating a View as Shared

Options for designating a view as 'shared' follow. Once you designate a view as shared, it will appear in its selected View Group in the left panel. You can use the Stratum.Viewer Email View functionality in a view to let other users know it's ready. Include the view link and the name of the view group in the email.

Option 1: When Creating a New View

Designating a view as 'shared' can be done from the Save As window while creating a new view from an existing view.

1. Click Save As in the existing view.

2. While setting up properties for the new view in the Save View As window, choose Shared for the Type and choose a view group to which the view's intended users have access.

3. When you have set up all the properties, click Save in the Save View As window.

Option 2: When Updating an Existing View

A view's main Properties window can be used to designate the view as 'shared'. This option only applies to users who can access view explorer and Properties windows (advanced users and administrators).

1. Use the Show/Hide View Explorer button [image icon] in the view toolbar to display view explorer.

2. Double-click the folder for the view name in view explorer.

3. Choose Shared for the Type property in the Properties window that displays.

4. Click OK in the Apply Changes window and save the view [image icon].

Edit Basic View Properties

1. Right-click the view name in the grid or in view explorer and select Properties.

2. Change the desired basic property information using the applicable section of the Properties window -- name, description, type, view group, and so forth.

   - Select Global for Type to create a view that's accessible by you and other users (this option is only available to administrators). Select Personal if you want the view limited to your use and administrator use. Select Shared if you want the view to be accessible to all users who have access to the view group to which the view belongs.
   - Select Yes for Planning if you are editing the view to make it planning enabled for users.
   - You can select one or more view groups for the view using Ctrl+Click and Shift+Click.

Note: Only administrators can create Global views. Administrators can choose from any view groups that exist in Stratum.Viewer. Users with a casual or advanced access level can choose from groups enabled for their user profile. See also Why can't I see a View I just Added?.

Identifying which Server, Database and Cube are Assigned to a View

Use Properties Window

1. Right-click the view name in the grid or in view explorer, and select Properties.

2. Look at the Server, Database, and Cube properties in the Properties window for the view.

Use View List Window
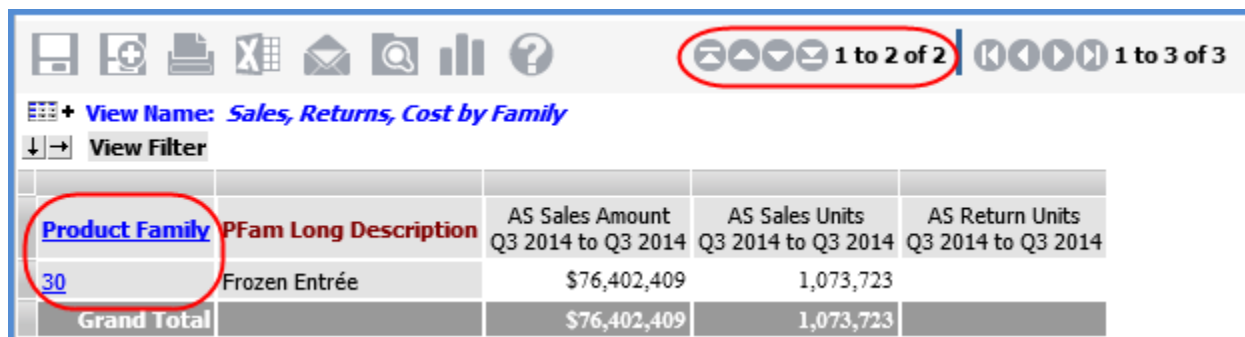
1. Click View in the Admin Utilities view group.

2. Scroll to the view in the list on the View List window.

3. Look at the information in the Server, Database, and Cube display columns for that view.

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.

```
SELECT MEMBERS: PRODUCT FAMILY                                              ✕

Search For: [                    ]   Search By: [ Product Family    ∨ ] [ Contains    ∨ ] [  Find  ] [  Stop  ]

 Product Family  ▲  PFam Long Description
 %                   %
 ?                   ?
 30                  Frozen Entrée
 31                  Frozen Individual Dinner
 50                  Tender Vegetables
 51                  Hardy Vegetables
 60                  Fruit Fillings
 61                  Applesauce
 62                  Frozen Juice
 64                  Specialty Canned Fruit
 65                  Fruit Cocktail
 66                  Peaches
 67                  Pears
 68                  Pineapple
 70                  Fresh Pork
 71                  Fresh Beef
 80                  Tender Fruits
 81                  Hardy Fruits




 [ Select ]  [ Advanced ]  [ Options ]            [  OK  ] [ Cancel ]      [  Help  ]
```

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.

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.

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.
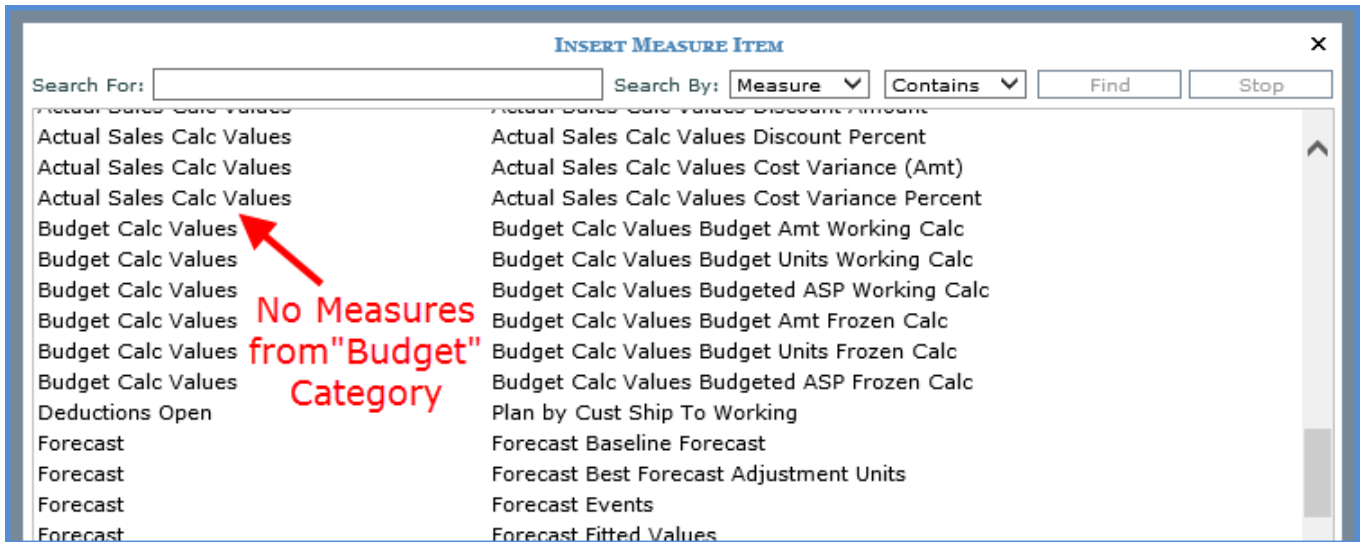
All Budget measures, both "Working" and "Frozen," display when the other user with full access uses the window.
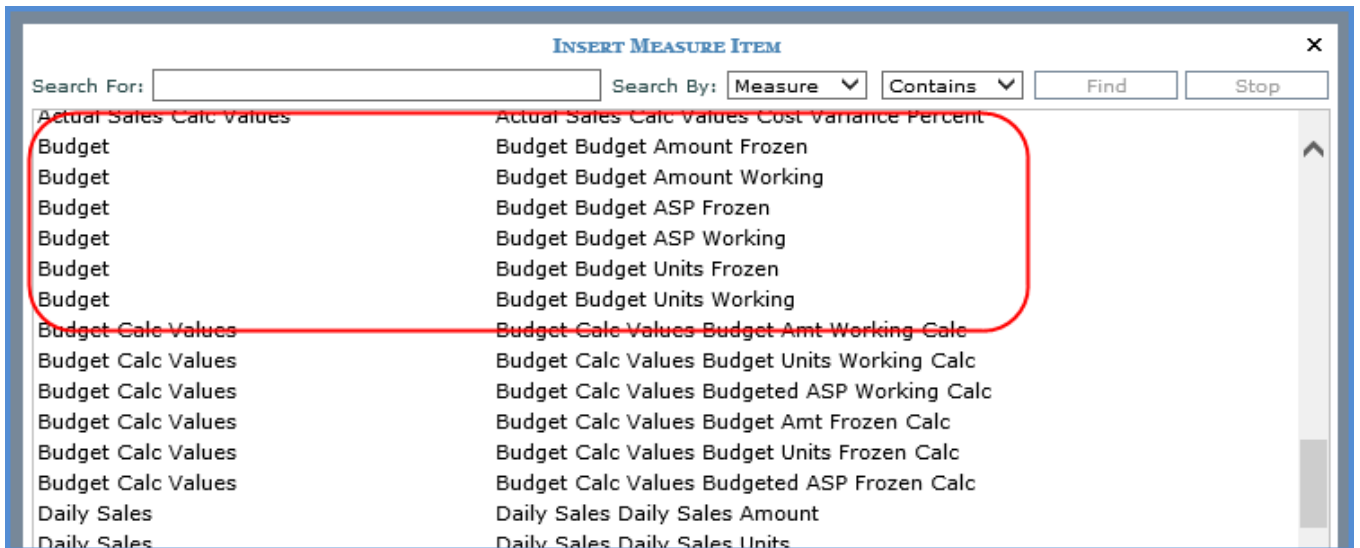
Measure Items Created from Stratum.Planner Calculated Values

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

View Types and Recommendations

Views can be assigned a "Type" designation of either Personal, Shared, or Global. The designation controls who can access the views and who can edit them. All users can assign a view a Personal or Shared designation. Only administrators can assign views a Global designation. See [Access to Views](#) for information about views you can access and how you can work with them.

Type	Definition	When to Give a View This Designation
Personal	A user-specific view of data that is created by individual users for their own use.	If the view is intended only for your use. Only the owner of a personal view will see the view in Viewer's left panel (in the view group to which the view belongs).
Shared	A collaborative view for use within a group or department and that can be created or used by any type of user.	If the view is intended for use by other users but does not need to be managed by a Viewer administrator. Anyone with access to the view group to which the view belongs will see the shared view in Viewer's left panel.
Global	A companywide view of data that is created by and managed by Viewer administrators.	If the view is intended to be used across your company and needs to be managed only by Viewer administrators. Anyone with access to the view group to which the view belongs will see the global view in Viewer's left panel.

Frequently Asked Questions (FAQ's)

Why can't I Delete a View?

You can't delete a view if:

1. The view is attached as a drilldown view to another view. Detach the view first then try again.

2. The view is global and you have a casual or advanced level of access in the application.

Why can't I save a View After Editing It?

That scenario can occur if you do not have the ability to save the type of view with which you're working. For example, if you're working with a global view and have a casual or advanced level of access to Stratum.Viewer.

If you want to save changes to a view in that scenario, create a new view from it by clicking the Save As button.

Why can't I see a View I just Added?

That can happen if you are a view or security administrator and the view group you selected for the view is not one that is enabled for your user profile group. Enable the group for your user profile so that it shows in the left panel. Otherwise, just select a different view group for the view and be sure it is one that already displays in the left panel.

Note: This scenario doesn't impact you if you have a casual or advanced level of access because the only view groups that you can save views to will be those already enabled for your user profile.

Why don't Totals Display in a View?

Totals will not display if they have been disabled:

- Totals can be disabled for individual levels and measures via the Totals property in their properties windows. If totals for all measure items have been disabled, no totals will display even if totals are enabled for levels.
- Totals can be disabled for all levels on rows and/or columns via the Totals properties on the axis icon pop-up menus ⬇ ➡.

Why is the Save Button Disabled?

That scenario can occur if you do not have the ability to save the type of view with which you're working. For example, if you're working with a global view and have a casual or advanced level of access to Stratum.Viewer.

If you want to save changes to a view where the Save button is disabled, create a new view from it by clicking the Save As button.

Definitions

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.

Calculated and Distinct Calculated Measure Item

Calculated measure items are based on expressions that you set up in the Expression window. The measure items are calculations between pieces of data or groups of data. They can represent additions, subtractions, multiplications, divisions, etc. And, their expressions can be built using regular measure items, other calculated measure items, measures, members, named sets, and special functions such as an average, variances, and percent of total.

Calculations for a calculated measure item are executed for each member of a level. A calculated measure item with its Distinct property enabled is known as a distinct calculated data item, and the calculations for that type of measure item are executed once for each level rather than individually for each level member. In the following view,

Var % YTD 2012 vs 2013 is a calculated measure item that is executed for Division F and G. The last measure item, % of Total 2013, is a distinct calculated measure item performed for the overall Division level.

	Division >>	F			G			Grand Total			
	Div Long Description	Foodservice Division			Grocery Division						
	Lot	Daily Sales Amount Jan 2012 to Sep 2012	Daily Sales Amount Jan 2013 to Sep 2013	Var % 2012 vs. 2013	Daily Sales Amount Jan 2012 to Sep 2012	Daily Sales Amount Jan 2013 to Sep 2013	Var % 2012 vs. 2013	Daily Sales Amount Jan 2012 to Sep 2012	Daily Sales Amount Jan 2013 to Sep 2013	Var % 2012 vs. 2013	% of Total 2013
	19994336914001				$5,035	$5,078	.85%	$5,035	$5,078	.85%	.03%
	19994336914002				$5,895	$5,959	1.09%	$5,895	$5,959	1.09%	.03%
	19994336914003	$7,384	$7,469	1.15%	$14,461	$14,634	1.19%	$21,845	$22,103	1.18%	.11%
	19994336914004				$10,370	$10,495	1.22%	$10,370	$10,495	1.22%	.05%
	19994336914008	$11,702	$11,847	1.23%	$19,678	$19,922	1.24%	$31,380	$31,769	1.24%	.16%
	19994336914015				$19,922	$20,170	1.24%	$19,922	$20,170	1.24%	.10%
	19994336914016				$14,320	$14,500	1.26%	$14,320	$14,500	1.26%	.07%
	19994336914022				$36,502	$36,988	1.33%	$36,502	$36,988	1.33%	.19%
	19994336914025	$5,332	$5,388	1.06%	$4,628	$4,673	.96%	$9,960	$10,061	1.02%	.05%
	19994336914301				$7,653	$7,739	1.13%	$7,653	$7,739	1.13%	.04%
	19994336914302				$10,277	$10,393	1.12%	$10,277	$10,393	1.12%	.05%
	19994336914303				$10,789	$10,914	1.15%	$10,789	$10,914	1.15%	.06%
	19994336914304	$10,196	$10,320	1.21%	$23,586	$23,884	1.27%	$33,782	$34,204	1.25%	.17%
	19994336914315				$5,839	$5,893	.92%	$5,839	$5,893	.92%	.03%
	19994336914322				$39,552	$40,075	1.32%	$39,552	$40,075	1.32%	.20%

View Name: *Lot Variance YTD* — View Filter

Caption

The text that you see in view header cells for measure items are captions. Captions represent the rendered text of caption expressions, which are based on administrative defaults but can be customized by you. Other places that captions display are view explorer, the Edit Measure Item window, and the Expression window.

View Name: *Budget YTD by Account Group* — View Filter

Acct Group	BD Amount Frozen Q1 13 to Q3 13	BD Units Frozen Q1 13 to Q3 13	BD Amount Frozen Q1 14 to Q3 14	BD Units Frozen Q1 14 to Q3 14
National Distributor	$3,164,652,158	55,287,315	$3,050,925,452	49,537,434
Regional Distributor	$315,708,727	4,898,971	$304,363,242	4,389,478
Independent	$878,290,713	13,909,538	$846,727,968	12,462,946
Grand Total	$4,358,651,598	74,095,824	$4,202,016,662	66,389,858

View Explorer

- Budget YTD by Account Group
  - Parameter Groups
  - Grid
    - Rows
    - Columns
    - View Filter
    - Measure Items
      - BD Amount Frozen Q1 13 to Q3 13
      - BD Units Frozen Q1 13 to Q3 13
      - BD Amount Frozen Q1 14 to Q3 14
      - BD Units Frozen Q1 2014 to Q3 2014
    - Presentation

Properties - BD Amount Frozen Q1 13 to Q3 13

| Name	Data1
Caption Expression	BD Amount Frozen [From F ...]
Type	Regular
Measure	Budget Budget Amount Fro...

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.
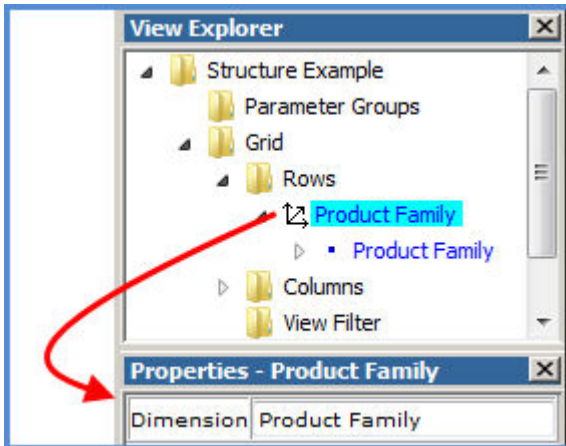
Level

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

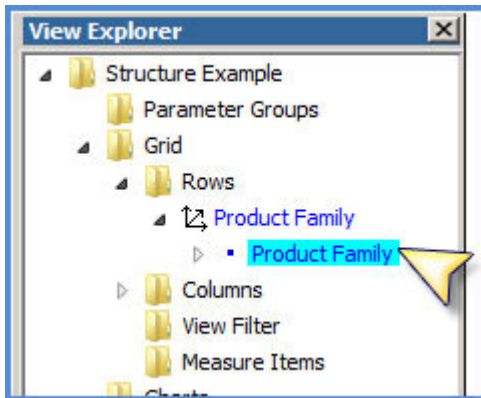There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Members belong to levels and represent the items of information for each level. You can see an example of members in the rows or columns of your views. Members can be displayed by their 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.

View Name: *Daily Sales by Product Family*
View Filter

▲ 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

Regular Measure Item

Regular measure items are items based on the measures in the Analysis Services database for your Stratum.Viewer environment. The Insert Measure Item window is used to create regular measure items within individual views.

Regular measure items can be created with or without time ranges, depending on the Time Range property for a view. If the Time Range property is Yes for a view, you can specify time ranges for its measure items. If the Time Range property is No, then time range functionality is disabled, but you can use time hierarchies in the view.

The regular measure items in the following view are based on Daily Sales measures and have a time range of Week 37 through 38 of 2014.

⊞+ View Name: *Daily Sales by Customer Type*			
↓ → **View Filter**			
Customer Type	**Ship-To Territory**	Daily Sales Daily Sales Amount Wk 37 2014 to Wk 38 2014	Daily Sales Daily Sales Units Wk 37 2014 to Wk 38 2014
Class B Customer	Southwest	$286,797	2,554
	South Central	$317,063	2,734
	Gulf Coast	$348,421	3,227
	Midlantic	$400,396	3,779
	New England	$529,373	4,516
	Great Lakes	$189,547	1,741
	Great Plains	$329,536	3,160
	Northwest	$277,316	2,471
	Western Provinces	$186,334	1,545
	Central Provinces	$529,959	4,555
	Eastern Atlantic Provinces	$596,137	5,502
Grand Total		$3,990,880	35,784