



## Working with View Groups

### Stratum.Viewer 6

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## Getting Started

### Access to View Groups

Users with a view administrator or security administrator user profile level can add, edit, and delete view groups.

### Introduction to View Groups

View groups are a means of organizing views and user links for display in the left panel of Stratum.Viewer. You can set up groups for various types of views (sales, inventory, forecasting) or for various types of users (casual, advanced, administrators). The application is delivered with two standard groups that are named Admin Utilities and Default View Group.

You control who has access to each view group by attaching them to one or more user profile groups. Views and user links can be added to view groups via the View Group window or from the Properties window for a view.

## Quick Start - Give Users Access to Stratum.Viewer

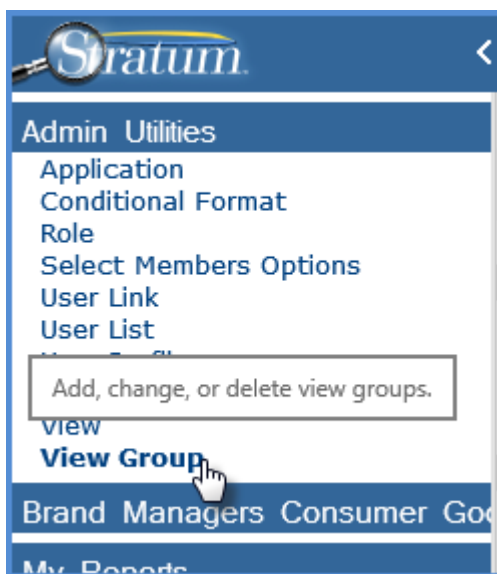
Anyone that needs access to Stratum.Viewer will need to have a role, user profile, and user profile group plus have at least one view group assigned to their user profile group.

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

1

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

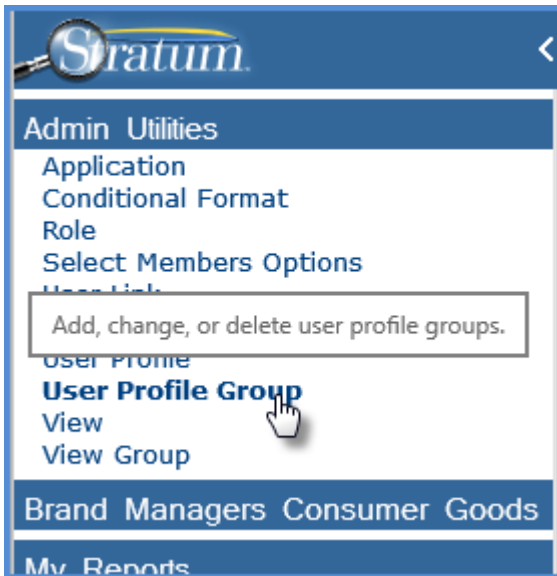
- Skip this step if view groups that are suitable for the new user already exist.
- Click View Group in the left panel to access the [window](#).

A screenshot of the 'View Group' configuration window. The window title is 'View Group'. At the top, there are icons for adding, saving, closing, and help. Below the icons is a dropdown menu labeled 'View Group:' with the text 'Select a view group...'. There are three tabs: 'General', 'Views', and 'User Links'. The 'General' tab is selected. Under the 'General' tab, there are fields for 'Name:' and 'Description:'. Below these is a 'Picture' section with a 'Picture:' field and a 'Browse...' button. There is also a 'Remove Picture?' checkbox. At the bottom, there is a 'Startup Status' section with two radio buttons: 'View Group Collapsed' (selected) and 'View Group Expanded'.

2

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


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

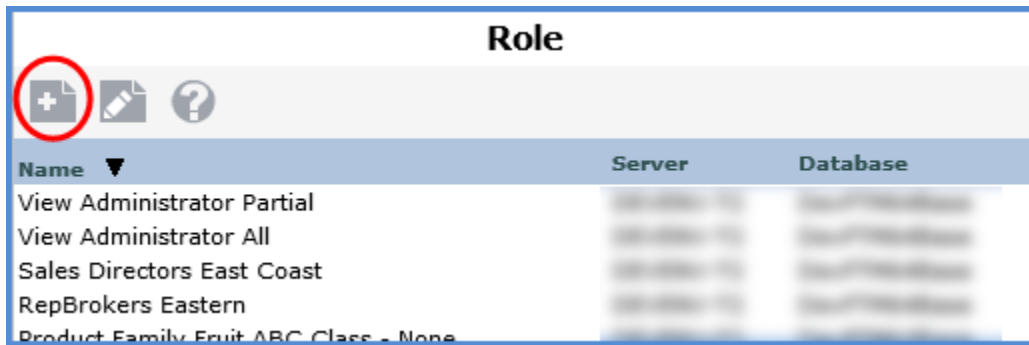
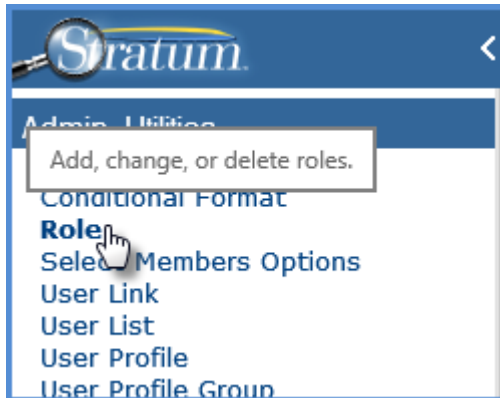
A screenshot of the "User Profile Group" configuration window. The window has a title bar with standard icons (add, save, close, help). Below the title bar, there is a dropdown menu for "User Profile Group" with the text "Select a user profile group...". The main content area is divided into sections: "General" with fields for "Name:" and "Role:" (a dropdown menu with "Select a role..."), and "Override Home Page" (a checkbox and a text field with a URL icon and "(ex. http://www.silvon.com)"). Below this is a section for "View Groups" and "User Profiles". The "View Groups" section has a table with columns "Order" and "Name". The "User Profiles" section has the text "No user profiles available to be assigned." The table in the "View Groups" section has the following data:

| Order | Name  |
|-------|---|
| 0     | <input type="checkbox"/> Admin Utilities                |
| 0     | <input type="checkbox"/> Base Views with Time Ranges    |
| 0     | <input type="checkbox"/> Base Views without Time Ranges |
| 0     | <input type="checkbox"/> Brand Managers Consumer Goods  |
| 0     | <input type="checkbox"/> Default View Group             |

3

### Add a role using the Role Maintenance window.

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



The screenshot shows the Role Maintenance window. At the top, there is a 'Role' title bar. Below the title bar, there are three icons: a plus sign (circled in red), a pencil, and a question mark. Below the icons is a table with the following columns: 'Name', 'Server', and 'Database'. The table contains several rows of role names, including 'View Administrator Partial', 'View Administrator All', 'Sales Directors East Coast', 'RepBrokers Eastern', and 'Product Family Fruit ABC Class - None'.

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

### Role Maintenance

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**General**

Name:

Server:

Database:

Attributes
Measures
User Profiles

**Select Attributes to Allow Access**

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

4

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

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



## User Profile

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User Profile:

### General

First Name:

Last Name:

Windows User Name:

Windows Domain:

Email Address:

Language:

Disable User Profile

### Accessibility

[User Profile Group](#):

Level:

[Role](#):

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

### User Options

Auto Hide Left Panel

Show View Explorer

Override Planning Update Format 1234.10

Override View Page Size      Rows:       Columns:


## Tasks

### Add a View Group


1. Click View Group in the Admin Utilities view group.
2. Set up properties in the [View Group window](#).
  - a. Adding an image to the group is optional.
  - b. The group will display collapsed by default unless you select View Group Expanded on the General tab.
3. Save the group.
4. To make the group visible in the left panel, you must enable it for the user profile group(s) of the intended users:
  - a. Click User Profile Group in the Admin Utilities view group.

- b. Use the [User Profile Group window](#) to select the desired user profile group, then select the view group that you just set up, and save the user profile group.
- c. Repeat Step b for additional user profile groups that need access to the view group.


## Attach to a User Profile Group

1. Click User Profile Group in the Admin Utilities view group.
2. In the [User Profile Group window](#), select the group to which you want to attach view groups.
3. In the View Groups section, select checkboxes of the view groups.
4. Save  the group.


## Delete a View Group

1. Click View Group in the Admin Utilities view group.
2. Select the view group.
3. Click Delete .

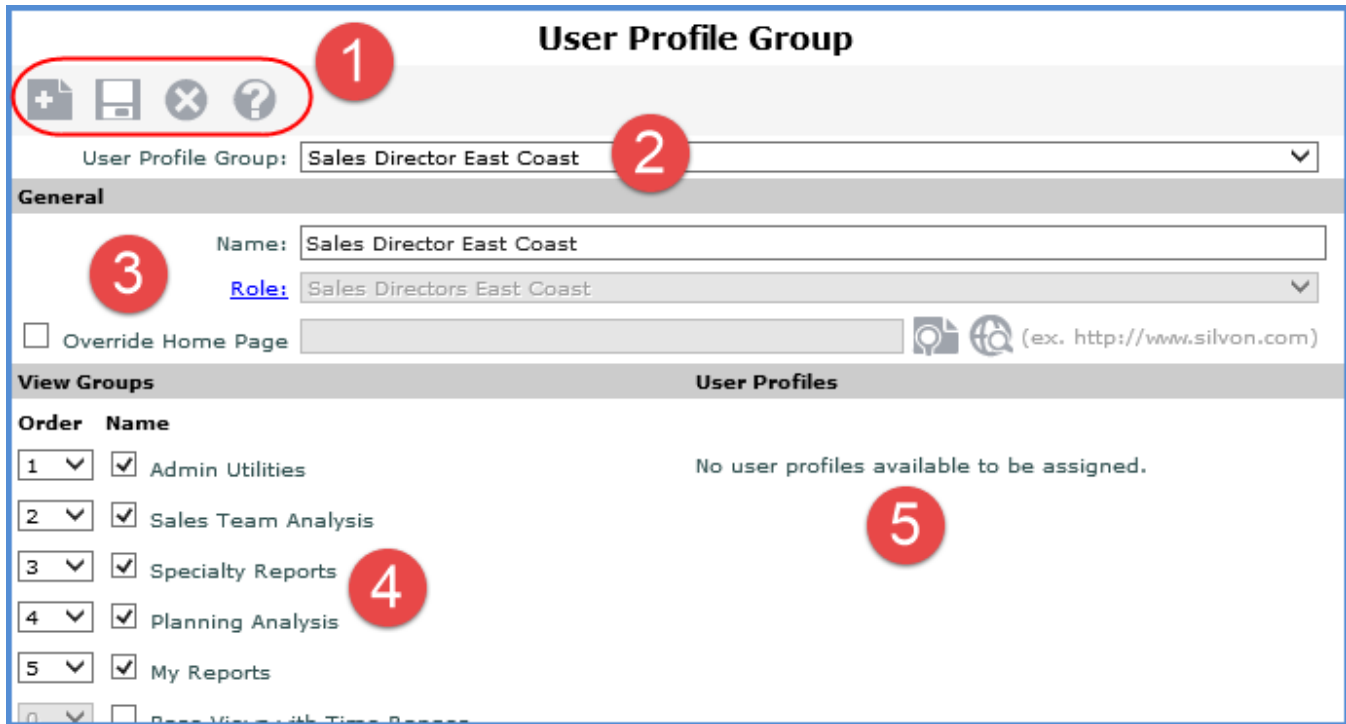
## Edit a View Group





1. Click View Group in the Admin Utilities view group.
2. Select the group in the [View Group window](#).
3. Edit properties on the General, Views, or User Links tab.
4. Save  the group.

## Edit the Order of View Groups



1. Click User Profile Group in the Admin Utilities view group.
2. Select the group in the [User Profile Group window](#).
3. Use the Order drop-down boxes to re-order the view groups for that user profile group.
4. Save  the group.

## User Profile Group Window



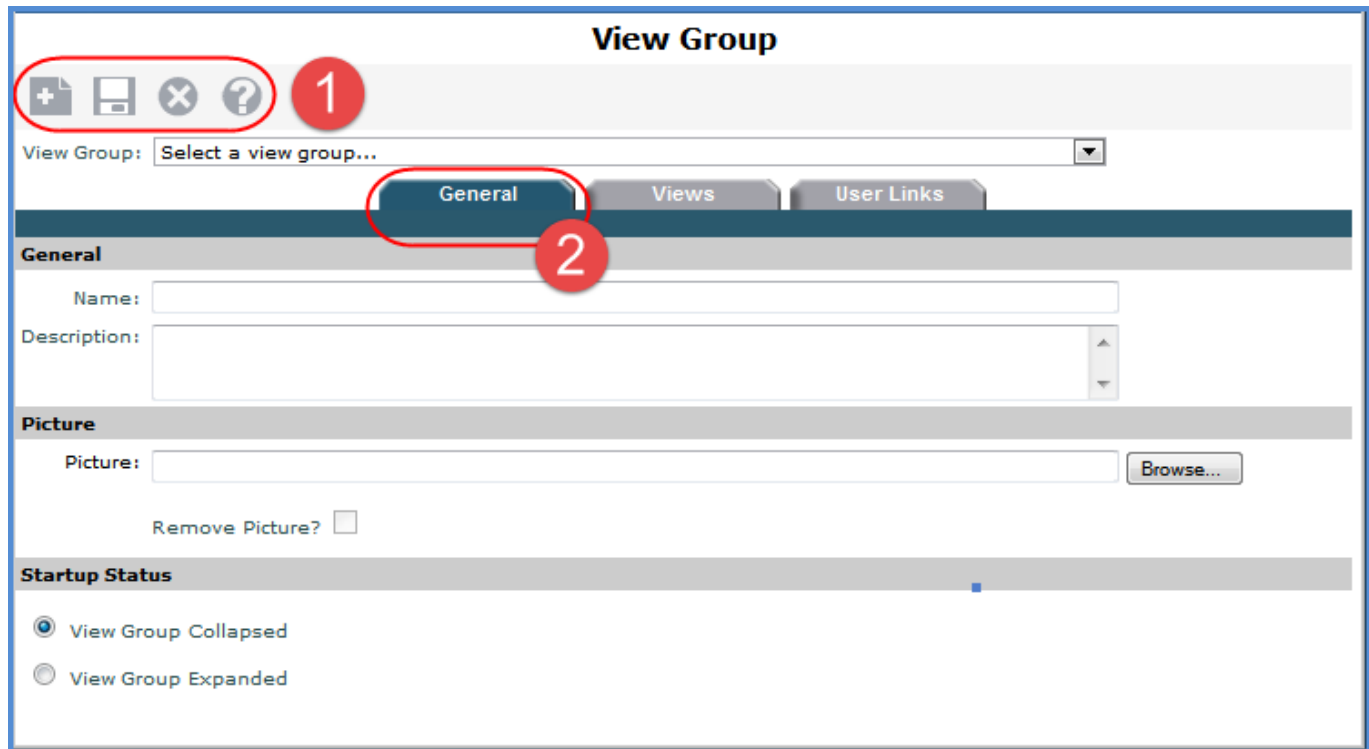
|          |   |
|----------|---|
| <b>1</b> | <p><b>Toolbar -</b></p> <ul style="list-style-type: none"> <li>• <b>New</b>  - Click to clear the window and set up a new group.</li> <li>• <b>Save</b>  - Click to save a new group or to save edits to an existing group.</li> <li>• <b>Delete</b>  - Select a group from the User Profile Group drop-down list, then click Delete to delete the group.</li> <li>• <b>Help</b>  - Click to open help that is specific to working with user profile groups.</li> </ul>     |
| <b>2</b> | <p><b>User Profile Group</b> - Use this list to select an existing group and populate the window with the group's properties.</p>   |
| <b>3</b> | <p><b>General -</b></p> <ul style="list-style-type: none"> <li>• <b>Name</b> - Use this field to specify or edit the group name.</li> <li>• <b>Role</b> - Use this drop-down list if you need to assign a role to the entire group. In that case, all user profiles in the group will have the same role. If no role exists, then you can click Role to access the Role window and add a role. Cases when you would not need to choose a role are for a group are: <ul style="list-style-type: none"> <li>• If all the user profiles in the group will have roles assigned to them individually. That means user profiles in this group may have different roles. You can use the <a href="#">User Profile window</a> or Role Maintenance window to assign a role to an individual user profile.</li> </ul> </li> </ul> |







|                 |  |
|-----------------|--|
|                 | <ul style="list-style-type: none"> <li>When the group is intended to only have user profiles that have a security administrator level of access in the application. Security administrators do not need to have roles assigned to them.</li> <li><b>Override Home Page</b> – Use this option if you need to assign the user group a home page that differs from the global home page associated with Stratum.Viewer. Select the Override Home Page checkbox. Then enter the information for the web site, shared document, directory, or other supplementary information that you want to act as the home page for this user group. Use the Browse from File  or Browse the Web  buttons if needed to select a home page.</li> </ul> |
| <p><b>4</b></p> | <p><b>View Groups</b> - Selected view groups will be visible in the left panel for user profiles in the user profile group. Once a group is selected, the Order drop-down list is enabled for it. Use those lists to control the order that the groups display within the left panel. View groups and user profiles can also be attached to one another using the View Group window.</p>   |
| <p><b>5</b></p> | <p><b>User Profiles</b> - For new groups, this section will list any existing user profiles that do not belong to a user profile group yet. There will be checkboxes next to the user profiles for adding them or removing them from a group. If no user profiles exist or all of the existing user profiles have been assigned to other groups, the text 'No user profiles available to be assigned' displays in this section.</p>  |

## View Group Window

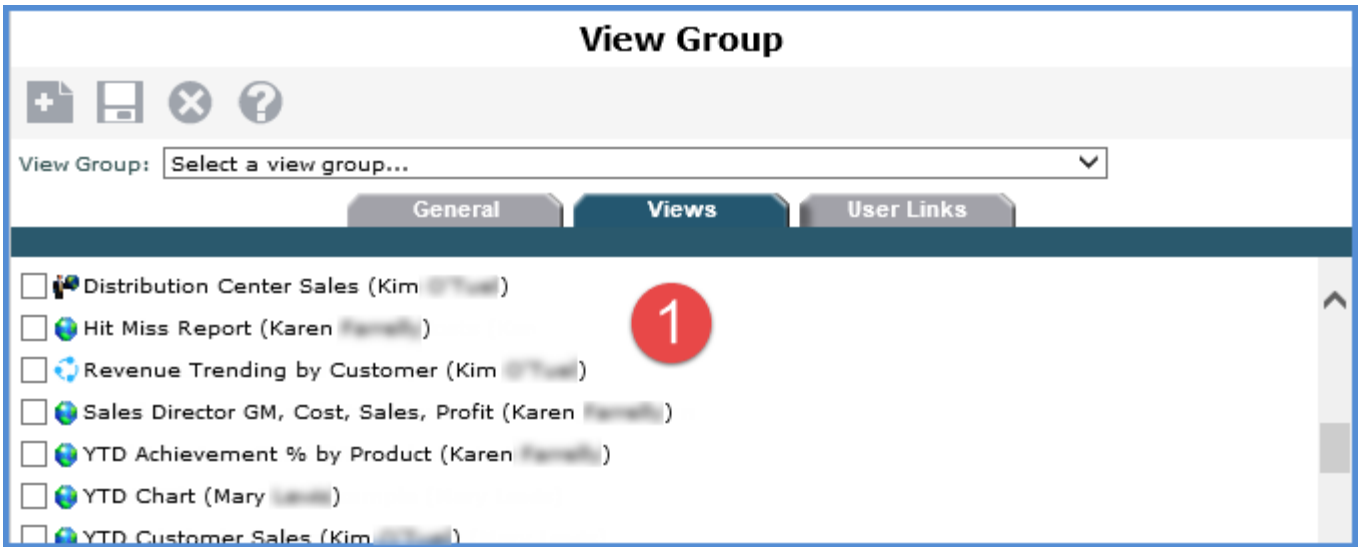
### General Tab






|                 |  |
|-----------------|--|
| <p><b>1</b></p> | <p><b>Toolbar -</b></p> <ul style="list-style-type: none"> <li><b>New</b>  - Click to clear the window and set up a new group.</li> <li><b>Save</b>  - Click to save a new group or to save edits to an existing group.</li> </ul> |
|-----------------|--|

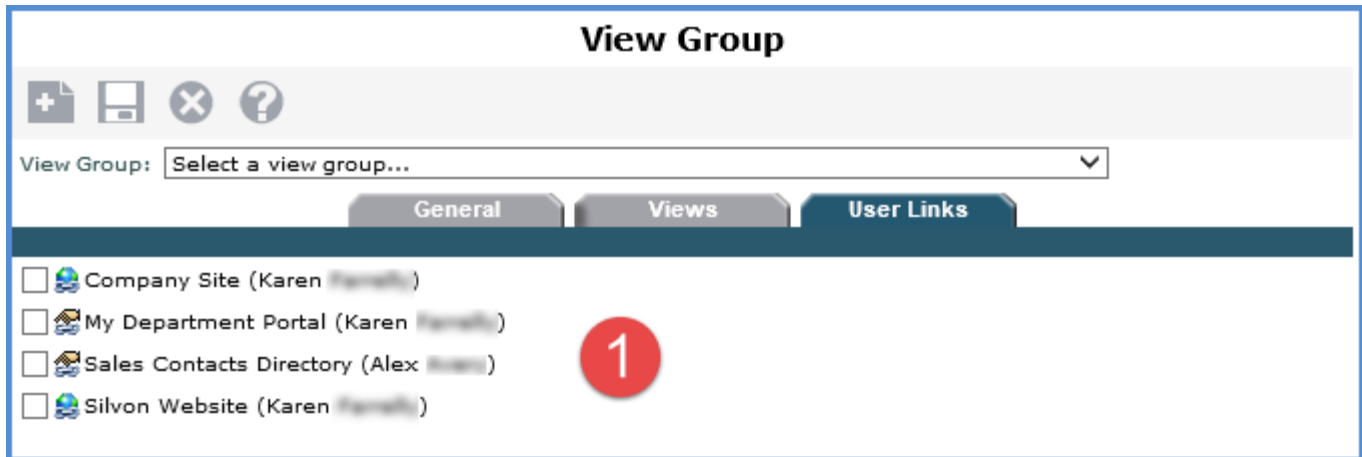
|                 |  |
|-----------------|--|
|                 | <ul style="list-style-type: none"> <li>• <b>Delete</b>  - Select a group from the View Group drop-down list, then click Delete to delete the group.</li> <li>• <b>Help</b>  - Click to open help that is specific to working with view groups.</li> </ul>  |
| <p><b>2</b></p> | <p><b>General Tab Properties -</b></p> <ul style="list-style-type: none"> <li>• <b>General</b> - Use this section to specify the name and description. The description is optional.</li> <li>• <b>Picture</b> - Optionally use this section to add an image to the group or remove an image. Use the Browse button to search for and select an image. Images display next to the group name in the left panel.</li> </ul> <p><b>Startup Status</b> - Groups display collapsed by default unless you select the View Group Expanded option.</p> |

**Views Tab**





|                 |  |
|-----------------|--|
| <p><b>1</b></p> | <p><b>Views</b> - Use this list to add views to the group or remove views. The icon next to the view name indicates whether the view is global , shared , or personal . The name of the person who owns the view displays after the view name. Views are listed in alphabetical order.</p> <hr/> <p><b>Note:</b> The tab will be blank if no views exist.</p> |
|-----------------|--|

## User Links Tab



1

**User Links** - Use this list to add user links to the group or remove links. The icon next to the link name indicates whether the link is global  or personal , and the name of the person who last saved the link displays after the link name.

**Note:** The tab will be blank if no links exist.

## Advanced Concepts

### Limited Control over Admin Utilities View Group

There is a standard view group delivered with the application that is named Admin Utilities. The group contains links to some general user windows such as the User List and User Link windows. The group also contains links to administrator windows such as the [User Profile Group](#) and Role windows.

Administrators can make limited, general edits to this group. They can change the name and description, associate a picture with the group, and control whether it displays as expanded or collapsed. They cannot attach views or users links to the group, and they cannot delete the group.

### Relationship between View Groups and User Profile Groups

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

## Relationship between Views and View Groups

In order for you to see a view in the left panel, it must be in one of your view groups. Each view must be assigned to at least one view group, but it can also be assigned to other additional groups.

Views can be assigned to groups in various ways depending on your level of access in the application:

- All users can do so from the Save View As window.
- Users with the ability to create new views from scratch can right-click a view group in the left panel and choose New View. The view will be assigned to that group.
- Users with access to view explorer can choose the view group(s) in the Properties window for the view.
- Administrators can do so from the [View Group window](#).

Users with a casual or advanced level of access can save shared and personal views into view groups that are part of their user profile group. Users with a view or security administrator level of access can save global, shared, and personal views into any view group that exists in Stratum.Viewer.

## Frequently Asked Questions (FAQ's)

### Can a View be in More than One View Group?

Yes. Attach as many views as needed using the Views tab of the View Group window. Or, select multiple view groups when working with the Properties window for a view or when using the Save View As window.

### Why can't I Delete a View Group?

You will be prevented from deleting a view group in two cases:

1. The view group is attached to a user profile group. In that case, you first must access the User Profile Group window and detach the view group from any user profile groups. Then you can return to the View Group window to delete the view group.
2. The view group is the standard Admin Utilities group. That group cannot be deleted. See [Limited Control over Admin Utilities View Group](#).

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

A view group needs to be attached to your user profile group in order for you to see the view group in the left panel of the application. You can attach view groups and user profile groups through the User Profile Group window.

## Definitions

### User Profile

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

### User Profile Group

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