



Working with Planning

Stratum.Viewer 7

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Getting Started

Access to Planning

Planning updates can be made only in views that meet planning requirements and to measures that have a Planning Allowed status in measure administration settings.

- Casual users, advanced users, and view administrators can make planning updates on measures to which their roles give them authority to update
- Security administrators can make planning updates to measures whose Category (measure group) has an Update Enabled status in Stratum.Connector for Viewer

Introduction to Planning

Users can adjust sales plan data for their company utilizing Stratum.Viewer planning functionality. Measure item values can be changed directly in the grid then submitted for update to the database for immediate visibility to other users.

Planning updates can be done at any level. Updates made at a detailed level are automatically “rolled up” to higher levels. Updates made at higher levels are automatically “rolled down” and allocated to all the detailed levels. This gives the user the flexibility to adjust data at any level. Planning updates can be typed into each cell or pasted into cells from Microsoft Excel spreadsheets or from other existing values in the grid. Users can tab from one planning cell to the next as they make changes or simply press the Enter key after making a change to move to the next available planning cell.

The following image shows a view that was set up to update Budget data. Notice the planning icons next to the Budget values.


View Name: *Planning Updates - Budget for RepBroker*

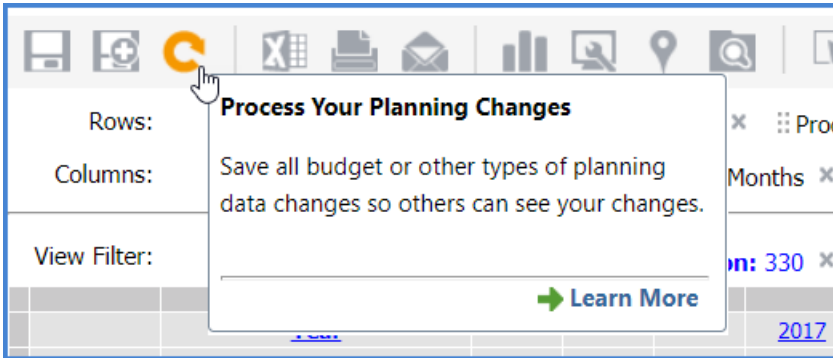
View Filter

		RepBroker >> 300									
		RepBr Long Description Nicole Toscano									
		Product Brand >> 001		002		003		004			
		PBrnd Long Description Tip Top		Dew Drop		SuperSweet		Idaho De			
Year	Months	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual S Amou
2014	January	\$1,800,703	25,485	26,267	\$1,399,257	26,774	27,596	\$587,118	15,200	15,667	\$153
	February	\$929,898	14,031	10,699	\$1,893,875	33,408	31,752	\$601,970	15,558	13,134	\$530
	March	\$1,377,638	18,995	19,578	\$1,386,248	25,151	20,709	\$317,008	7,994	8,289	\$477
	April	\$1,343,048	22,051	11,707	\$1,384,855	33,076	34,458	\$735,985	21,885	17,216	\$724
	May	\$1,380,989	23,654	19,701	\$883,011	28,784	20,586	\$1,111,874	34,869	22,849	\$744
	June	\$1,390,533	27,116	25,357	\$2,023,167	48,089	44,984	\$677,968	22,388	22,283	\$458
	July	\$1,106,840	20,434	21,152	\$1,644,859	38,974	30,326	\$793,636	27,398	19,774	\$1,097
	August	\$2,432,479	48,782	29,834	\$894,325	23,737	27,005	\$606,238	21,570	29,366	\$491
	September	\$1,781,268	27,412	23,685	\$2,107,574	55,361	25,382	\$855,212	24,578	10,133	\$963
	October			14,576			21,333			10,391	
	November			14,972			20,271			7,226	
	December			11,721			17,732			2,953	
	2014 Total	\$13,543,395	227,960	229,248	\$13,617,170	313,354	322,134	\$6,287,010	191,441	179,280	\$5,641
2015	January			30,141			31,665			17,977	
	February			1,322			3,924			1,623	
	March			24,121			25,515			10,212	
	April			14,854			43,718			21,844	
	May			22,936			23,967			26,602	
	June			29,184			51,772			25,646	
	July			26,822			38,456			25,076	
	August			35,092			31,765			34,542	
	September			32,710			35,054			13,994	
	October			18,741			27,428			13,359	
	November			19,249			26,063			9,290	
	December			17,884			25,755			5,475	
	2015 Total			273,057			365,083			205,640	
Grand Total		\$13,543,395	227,960	502,305	\$13,617,170	313,354	687,217	\$6,287,010	191,441	384,920	\$5,641

When changes are made, the pending updates are highlighted using the Planning Update Format. In this example, pending updates display in red font with a yellow background.

View Name: <i>Planning Updates - Budget for RepBroker</i>													
View Filter													
	RepBroker >>	<u>300</u>											
	RepBr Long Description	Nicole Toscano											
	Product Brand >>	<u>001</u>			<u>002</u>			<u>003</u>			<u>00</u>		
	PBrnd Long Description	Tip Top			Dew Drop			SuperSweet			Idaho D		
Year	Months	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual Sales Amount	Actual Sales Units	Budget Units Working	Actual Amo		
<u>2014</u>	January	\$1,800,703	25,485	26,267	\$1,399,257	26,774	27,596	\$587,118	15,200	15,667	\$15		
	February	\$929,898	14,031	10,699	\$1,893,875	33,408	31,752	\$601,970	15,558	13,134	\$53		
	March	\$1,377,638	18,995	19,578	\$1,386,248	25,151	20,709	\$317,008	7,994	8,289	\$47		
	April	\$1,343,048	22,051	11,707	\$1,384,855	33,076	34,458	\$735,985	21,885	17,216	\$72		
	May	\$1,380,989	23,654	19,701	\$883,011	28,784	20,586	\$1,111,874	34,869	22,849	\$74		
	June	\$1,390,533	27,116	25,357	\$2,023,167	48,089	44,984	\$677,968	22,388	22,283	\$45		
	July	\$1,106,840	20,434	21,152	\$1,644,859	38,974	30,326	\$793,636	27,398	19,774	\$1,09		
	August	\$2,432,479	48,782	29,834	\$894,325	23,737	27,005	\$606,238	21,570	29,366	\$49		
	September	\$1,781,268	27,412	23,685	\$2,107,574	55,361	25,382	\$855,212	24,578	10,133	\$96		
	October			14,576			27,689			10,391			
	November			14,972			20,271			7,226			
	December			11,721			17,732			2,953			
	2014 Total	\$13,543,395	227,960	229,248	\$13,617,170	313,354	328,490	\$6,287,010	191,441	179,280	\$5,6		
<u>2015</u>	January			30,141			31,665			17,977			
	February			10,322			3,924			1,623			
	March			24,121			25,515			10,212			
	April			14,854			43,718			21,844			
	May			22,936			23,967			26,602			
	June			29,184			51,772			25,646			
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	November			19,249			26,063			9,290			
	December			17,884			25,755			5,475			
	2015 Total			282,056			365,083			205,640			
Grand Total		\$13,543,395	227,960	511,304	\$13,617,170	313,354	693,573	\$6,287,010	191,441	384,920	\$5,6		

Changes are submitted for update using the Process Your Planning Changes icon  in the grid toolbar. Once the updates have been processed, they are available to all users.

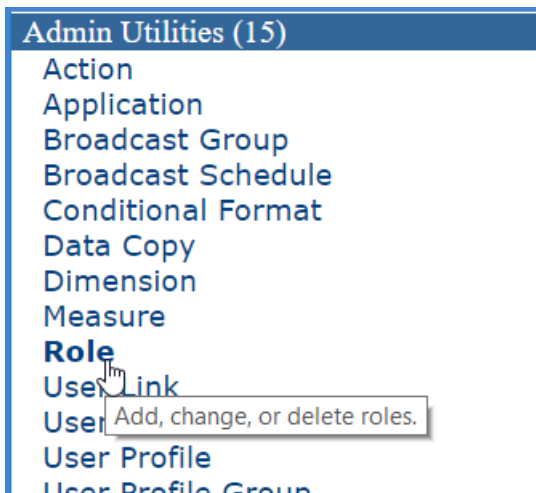


Quick Start – Set Up Planning Security

Here are the key steps to give users authority to make planning edits in views. These steps make measure items Update Enabled for a user and are a required step for users to be able to edit measure item data in planning views. See also [Quick Start – Set up Measures for Planning](#) and [Quick Start - Set up Views for Planning](#).

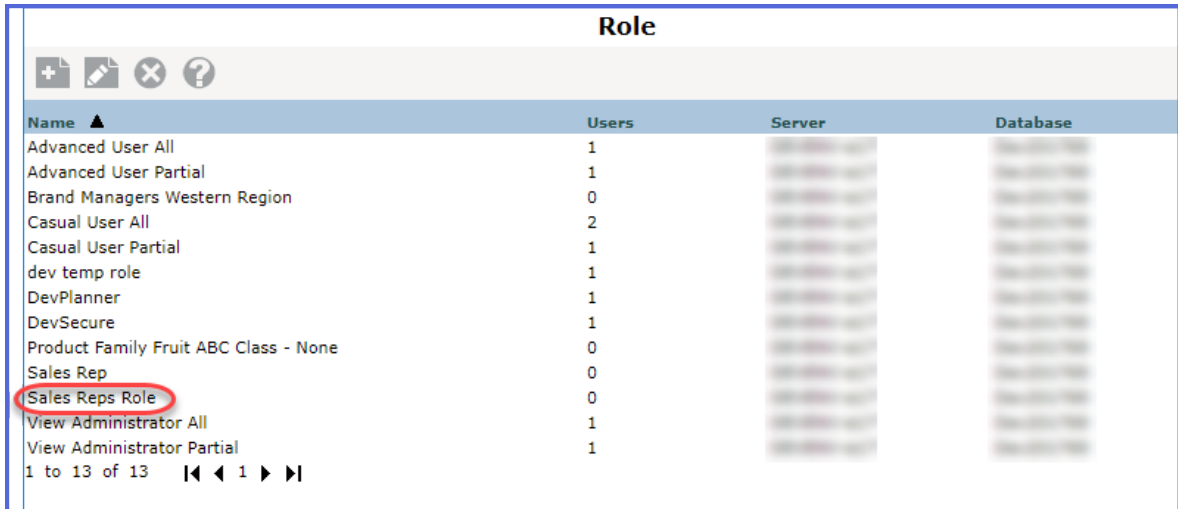
1

Click the Role option in the Admin Utilities view group.



2

Double-click the role in the [Role window](#).

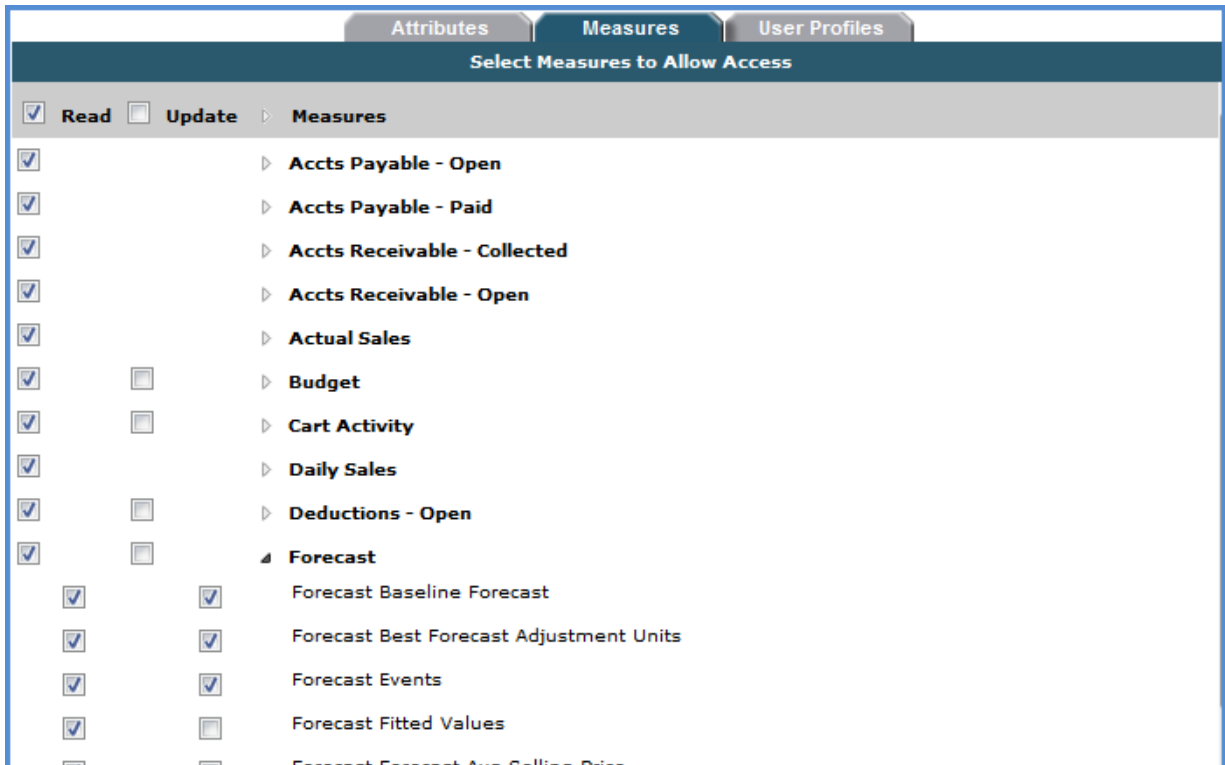


Name ▲	Users	Server	Database
Advanced User All	1		
Advanced User Partial	1		
Brand Managers Western Region	0		
Casual User All	2		
Casual User Partial	1		
dev temp role	1		
DevPlanner	1		
DevSecure	1		
Product Family Fruit ABC Class - None	0		
Sales Rep	0		
Sales Reps Role	0		
View Administrator All	1		
View Administrator Partial	1		

3

In the [Role Maintenance window](#), use the Update checkboxes on the Measures tab to give Update authority to the measures.

If an Update checkbox does not exist or is disabled for a Category, see [Why isn't there an Update Checkbox Available for a Role's Category?](#) or see [Why is an Update Checkbox Disabled for a Role's Category?](#).



Select Measures to Allow Access		
<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Update	Measures
<input checked="" type="checkbox"/>		▶ Accts Payable - Open
<input checked="" type="checkbox"/>		▶ Accts Payable - Paid
<input checked="" type="checkbox"/>		▶ Accts Receivable - Collected
<input checked="" type="checkbox"/>		▶ Accts Receivable - Open
<input checked="" type="checkbox"/>		▶ Actual Sales
<input checked="" type="checkbox"/>	<input type="checkbox"/>	▶ Budget
<input checked="" type="checkbox"/>	<input type="checkbox"/>	▶ Cart Activity
<input checked="" type="checkbox"/>		▶ Daily Sales
<input checked="" type="checkbox"/>	<input type="checkbox"/>	▶ Deductions - Open
<input checked="" type="checkbox"/>	<input type="checkbox"/>	▲ Forecast
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Forecast Baseline Forecast
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Forecast Best Forecast Adjustment Units
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Forecast Events
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Forecast Fitted Values
<input type="checkbox"/>	<input type="checkbox"/>	Forecast Forecast Avg Selling Price

4

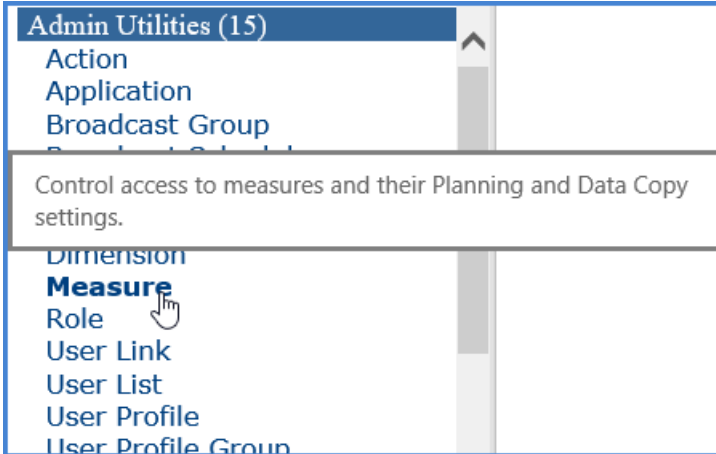
Save  the role.

Quick Start – Set up Measures for Planning


Here are the key steps for making measures editable in planning enabled views. These steps activate a Planning Allowed status for measures, which is a required step for users to be able to edit measure item data in planning views. See also [Quick Start – Set up Planning Security](#) and [Quick Start - Set up Views for Planning](#).

1

Click the Measure option in the Admin Utilities view group.



2

In the [Measure list window](#), select the checkboxes for all measures that users need to be able to make planning updates to in views. Then, click Edit .

A screenshot of the 'Measure' list window. The window title is 'Measure'. It has a search bar with 'forecast' entered and a dropdown menu set to 'All Measures'. Below the search bar is a table with columns: Category, Measure, Viewer Enabled, Planning Enabled, and Plan. The first four rows are highlighted in blue, and their checkboxes in the 'Category' column are checked. The remaining rows have unchecked checkboxes.

Category	Measure	Viewer Enabled	Planning Enabled	Plan
<input checked="" type="checkbox"/>	Forecast Baseline Forecast	Yes	Yes	Yes
<input checked="" type="checkbox"/>	Forecast Best Forecast Adjustment Units	Yes	Yes	Yes
<input checked="" type="checkbox"/>	Forecast Events	Yes	Yes	Yes
<input checked="" type="checkbox"/>	Forecast Fitted Values	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Avg Selling Price	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Units 1	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Units 3	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Units Adjustment 1	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Units Adjustment 2	Yes	Yes	Yes
<input type="checkbox"/>	Forecast Forecast Units Adjustment 3	Yes	Yes	Yes

3

In the [Measure Maintenance window](#), click the Planning Allowed checkboxes for the measures.

Measures that are “Planning Allowed” can be edited in planning views by users with roles that give users planning rights to such measures. See [Quick Start – Set up Planning Security](#).

MEASURE MAINTENANCE				
Measure	Viewer Enabled	Planning Allowed	Data Copy Enabled	Data Copy Allowed
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forecast Baseline Forecast	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forecast Best Forecast Adjustment Units	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forecast Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Forecast Fitted Values	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Selected

1 to 4 of 4

4

Save  the changes made to measures.

Quick Start – Set up Views for Planning

When setting up views to be used for planning, be sure to complete the following steps. See also [Quick Start – Set up Planning Security](#) and [Quick Start – Set up Measures for Planning](#). For more detailed information about view planning requirements, see [Planning Requirements Checklist](#).

1

Verify the Planning property = Yes.

Properties - Planning Updates - Budget for RepBroker	
Name	Planning Updates - Budget for RepBroker
Description	
Type	Global
Owner	Karen
Planning	Yes
	Base Views with Time Ranges
	Base Views without Time Ranges

- 2 Verify that Time Range = No and Drilldown View = None for the measure items axis.

Properties - Measure Items		×
Time Range	No	▼
Axis	Columns	▼
Drilldown View	None	▼

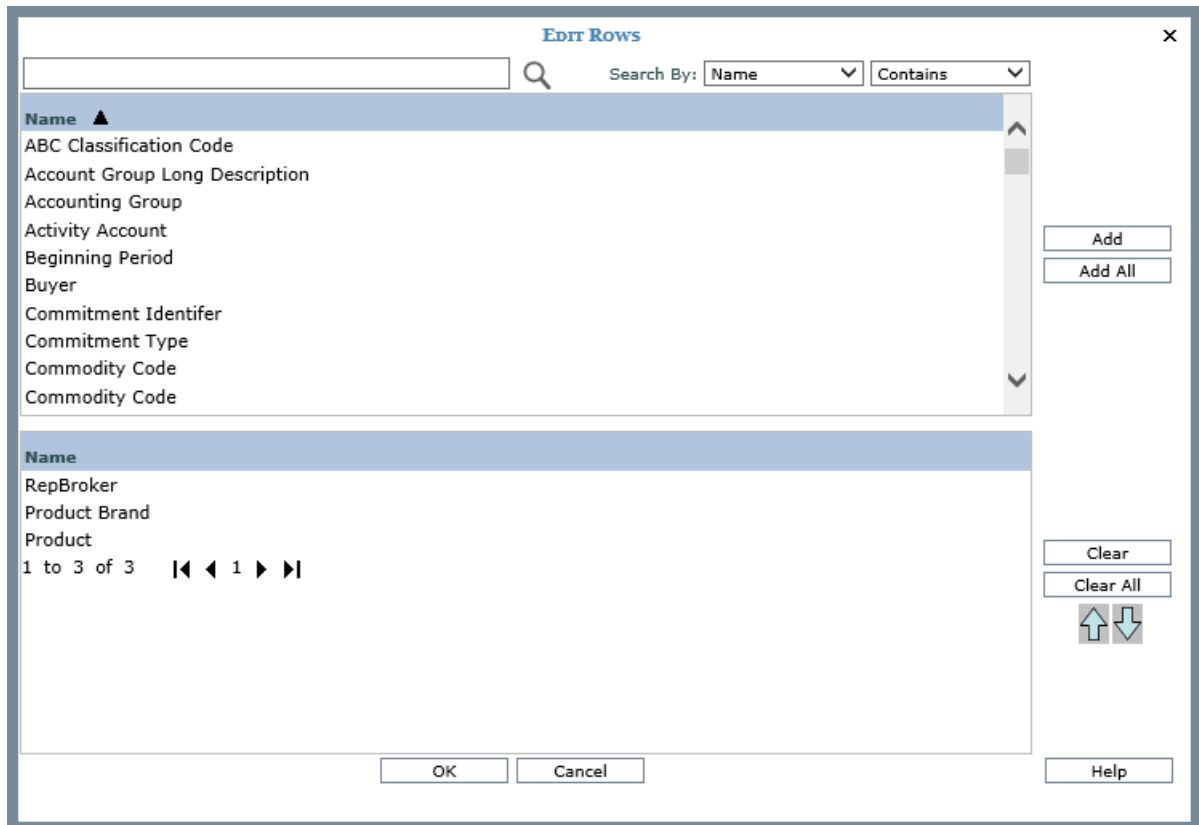
- 3 Choose the regular measure items for the view and verify that properties of each measure item to be used for planning updates match the following settings.

- Type = Regular
- Value = Yes
- Image = No
- Conditional Format = No
- Pop-up Expression = No
- Hyperlink = No
- Visible = Yes

Properties - Budget Budget Units Working		×
Name	Data6	
Caption Expression	[Measure]	...
Type	Regular	▼
Measure	Budget Budget Units Working	🔍
Format String	As Is	▼
Value	Yes	▼
Image	No	▼
Conditional Format	No	▼
Pop-up Expression	No	▼
Hyperlink	No	▼
Visible	Yes	▼
Filter		▼
Sort	None	▼
Total	Total	▼

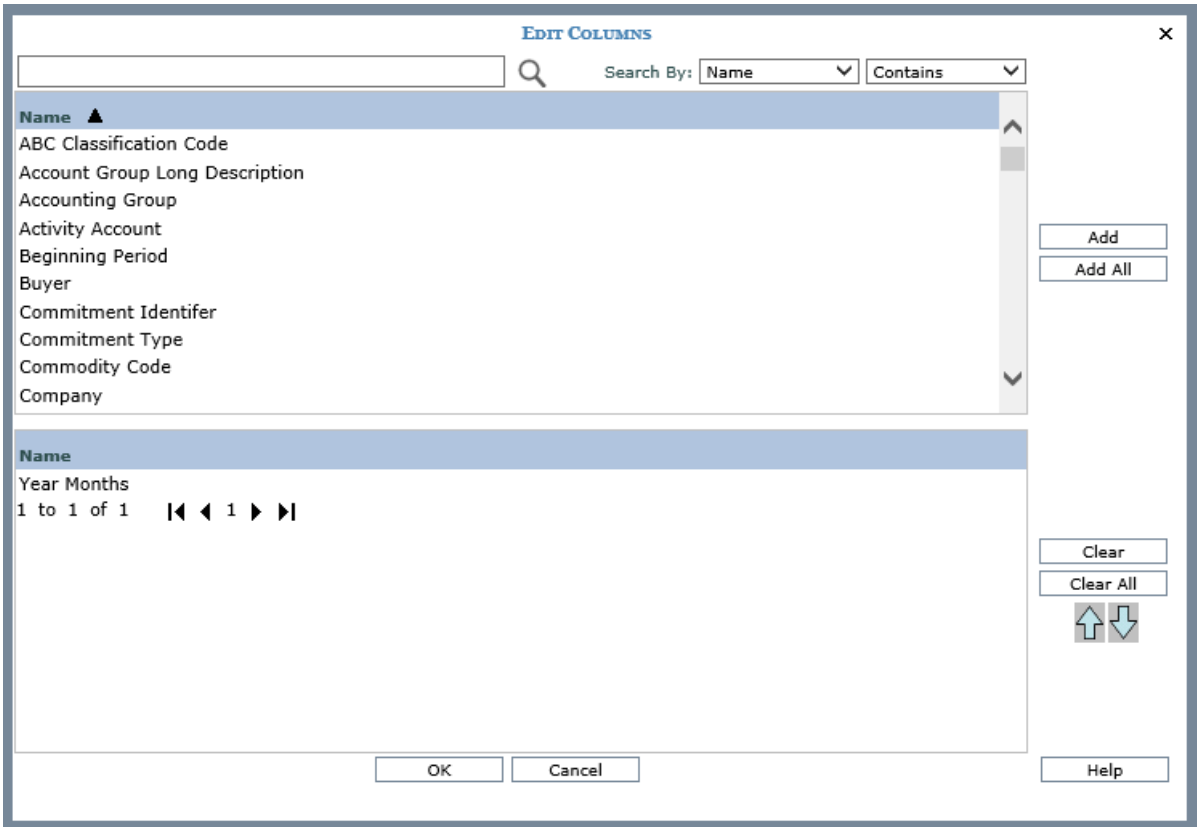
4

When choosing hierarchies for the view, consider what is appropriate based on your planning needs. For example, planning by Product Brand or Product might make more sense than planning by ABC Classification.



5

When choosing time hierarchies for the view, consider what is appropriate based on your planning needs. For example, it may make more sense to update data by months rather than weeks.



Tasks – Setting Up Planning


Set up Security and Measures for Planning

Properties in user roles and measure administration settings need to be set up for users to be able to make planning updates on measure items in views.



- A user's roles must give them authority to make planning updates on measures.
- Measures need to have a Planning Allowed status, which is activated via measure maintenance settings.

Steps to complete both of these requirements follow. See also [Set up Planning Enabled Views](#).

Give Users Authority to Make Planning Updates in View

1. Click Role in the Admin Utilities view group.
2. Double-click the user's role in the Role window.
3. In the [Role Maintenance window](#), use the Update checkboxes on the Measures tab to give users of the role update authority to measures.
 - The Update option only appears for measures where the Category (measure group) has been Update Enabled in Stratum.Connector for Viewer.
 - You can give Read access to a measure or Category without giving Update authority. But, you cannot give Update authority without Read access. When an Update checkbox is selected, the application automatically selects the corresponding Read checkbox.
 - Update checkboxes will be disabled for measures if any dimensions related to the measures have their attributes access set to None on the Attributes tab.
4. Save  the changes.

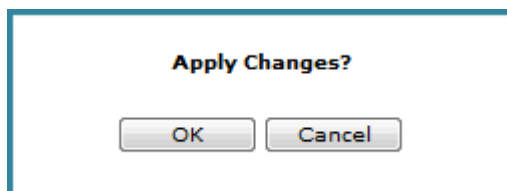
Make Measures "Planning Allowed" for Views

1. Click Measure in the Admin Utilities view group.
2. In the Measure list window, select the checkboxes for all measures that you want to allow planning updates to be made to in views. Then, click Edit .
3. The Measure Maintenance window opens for the selected measures. Click their Planning Allowed checkboxes. As a shortcut to selecting all, select the main Planning Allowed checkbox in the heading above the individual checkboxes.
 - Measures that are "Planning Allowed" can be edited in planning views by users with roles that give users planning update authority to such measures. See the previous set of steps about roles.
 - Planning Allowed checkboxes will be greyed out and unavailable if a measure isn't Planning Enabled. A Planning Enabled measure is one that belongs to a Category (measure group) that has been Update Enabled in Stratum.Connector for Viewer.
4. Save  the changes to the measures.

Set up Planning Enabled Views

When you are building a view intended for planning updates, complete the following steps to make sure the view meets all requirements. See also [Set up Roles and Measures for Planning](#). For more detailed information about view planning requirements, see [Planning Requirements Checklist](#).

1. Set the Planning property to Yes.
 - Right-click the view name in the grid or double-click the name in view explorer, and then select Properties.
 - Select Yes for Planning in the properties window.
2. Set the Time Range property to No and Drilldown View property to None.
 - Double-click the Measure Items folder in view explorer.
 - Select No for Time Range and None for Drilldown View in the properties window.
3. Add regular measure items that are planning enabled for the intended users and set up the required planning properties for each regular measure item. If you already added the measure items, skip to the last bulleted item in this step.
 - Right-click the Measure Items folder in view explorer, and select Add Regular Measure Item.
 - Use the Add Measure Item window to select the measure items.
 - For each planning enabled measure item that you add, double-click the caption in view explorer to open its properties window and verify its properties match the following settings:
 - Type = Regular
 - Value = Yes
 - Image = No
 - Conditional Format = No
 - Pop-up Expression = No
 - Hyperlink = No
 - Visible = Yes
4. Add hierarchies that are applicable to the measures that users will be updating.
 - Right-click the rows or columns folder in view explorer, and select Edit.
 - Use the Edit window to select hierarchies. Since planning can be done on any level of detail, consider what is appropriate based on your planning needs. For example, planning by Product Brand or Product might make more sense than planning by ABC Classification.
5. Add time hierarchies into the view.
 - Right-click the rows or columns folder in view explorer, and select Edit.
 - Use the Edit window to select time hierarchies applicable to the planning being done in the view. For example, if you are planning on Budget measure items, choose a time hierarchy at which budget planning is valid.
6. Click OK in the Apply Changes window.



7. Save  the view.

Tasks – Using Planning Views

Cancel Planning Changes

If you are changing values in a single cell and haven't moved away from that active cell yet, you can cancel the change by pressing the Esc key on your keyboard. Options for cancelling a single or multiple changes are to modify the state of the view -- for example, you can drill up or down in the view, navigate to another page in the view, or re-run the view from the left panel. Pending planning changes are not retained during such modifications.

Enter Planning Changes into the Grid

To type values into the cells of a planning enabled measure item:

1. Single-click a cell and begin typing. Your changes will overwrite values in the cell.

OR

1. Double-click a cell.
 - Your cursor will be placed at the start of the cell and you can edit the cell in a number of ways.
 - You can type at that first position to add to the value, use the arrow keys on your keyboard to move to another position within the cell and then type, use the Delete key to delete some or all of the values then type new values, and so forth.
2. Press the Enter key or click anywhere else in the view to accept the change. You can also use the Tab key after making changes to tab to the next available planning cell in the view. Press the Esc key while still in the active cell to cancel the changes.
3. See [Submit Planning Changes for Processing](#) when you are ready to process all pending changes in the view.

Note: You can also paste changes into planning views. See [Use Copy/Paste to Make Planning Changes](#).

Use Copy/Paste to Make Planning Changes

1. Copy data from an external source, such as a Microsoft Excel spreadsheet.

OR

1. Copy data from another measure item in the view. You can copy a single cell of data or multiple cells.
 - **Copy from Single cell** – Right-click the cell and select Copy.
 - **Copy from Multiple Cells** – To select adjacent cells, click the first cell and while pressing the Shift key, drag your cursor down and/or right to select the area of desired cells. To select non-adjacent cells, click the first cell and while pressing the CTRL key, select the other cells in the grid. When you have selected the last desired cell, right-click it and select Copy.
2. Paste the selected data into planning enabled cells of the measure items that you want to change. The cell or set of cells that you select for the paste will depend on how many values you copied.

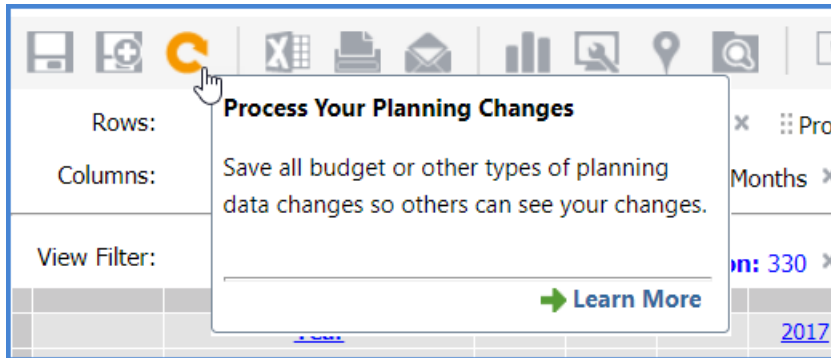
- **Paste a single value into a single cell** – Right-click the planning enabled cell and select Paste.
 - **Paste a single value into multiple cells** – A single value can be pasted into adjacent or non-adjacent cells.
 - **Adjacent cells** - Click the first cell of the area where you want to paste. Press the Shift key while dragging your cursor down and/or right in order to select the remaining cells of the desired paste area. When you have dragged to the last desired cell, right-click in that cell and select Paste.
 - **Non-adjacent cells** – Click the first cell and while pressing the CTRL key, click each of the other cells into which you want to paste the value. When you have selected the final cell, right-click and select Paste.
 - **Paste multiple values into multiple, adjacent cells** – Multiple values can be pasted into an area that is the same size and shape of the copied area. You can select the paste area or let Stratum.Viewer calculate the area for you based on a single starting point cell that you select.
 - **User selected area** – Click the first cell of the area where you want to paste. Press the Shift key while dragging your cursor down and/or right in order to select the remaining cells of the desired paste area. When you have dragged to the last desired cell, right-click in that cell and select Paste.
 - **Viewer calculated area** – Right-click a cell that is surrounded by enough planning enabled cells to accept the number of values that was copied, and then select Paste. The single selected cell is used as the starting (top /left) cell for the calculated paste area. Viewer will expand the paste area by rows and columns (down and right) from that starting point cell.
3. See [Submit Planning Changes for Processing](#) when you are ready to process all pending changes in the view.

Note: You can also type values directly into planning views. See [Enter Planning Changes into the Grid](#).

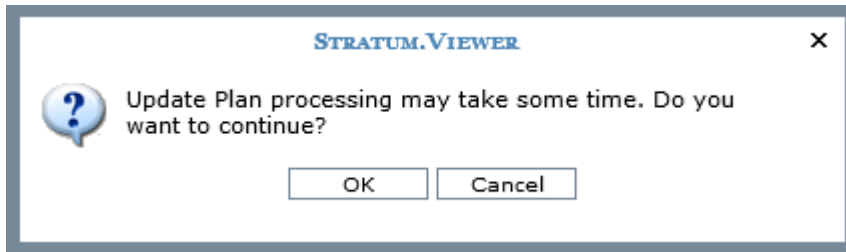
Submit Planning Changes for Processing

When you are done changing measure item data in a planning view, you must submit changes for processing back to the database so that your changes will be available to all users.

1. Click the Process Your Planning Changes icon in the grid toolbar.



2. To proceed, click OK in the prompt that displays. The grid will be refreshed with the updated data once the process has been completed. To cancel, click Cancel.



Examples

Views Created for Planning Purposes

All of the views that follow display a planning enabled measure item named Plan Units Working. The valid hierarchies for this measure are Customer Class, Product, and Region. Valid time hierarchies are Years, Quarter and Months.

Example 1

In the first example, Products by year are displayed. The cells that contain existing values for 2014 and 2015 can be updated since planning updates can be made at any level of detail for existing data. The blank cells for 2014 through 2016 cannot be updated since all the valid hierarchies for Plan Units working must be represented in this view in order to update blank or zero cells.

	Y Year >>	2014	2015	2016	Grand Total
Y Product	Prod Long Description	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
624D954019	Meatloaf, Frozen 4D	145,801	174,816		320,616
624E954024	Orange Juice Conc. 4E	141,015	163,834		304,850
624D954024	Orange Juice Conc. 4D	130,168	151,232		281,400
624H954023	Sirloin Tips - USDA Grade A 4H	114,116	129,320		243,436
624F954023	Sirloin Tips - USDA Grade A 4F	99,851	113,155		213,006
624E954023	Sirloin Tips - USDA Grade A 4E	92,719	105,073		197,792
624D954023	Sirloin Tips - USDA Grade A 4D	85,587	96,990		182,577
624J954017	Cherries, Bing 4J	53,775	62,757		116,532
624I954017	Cherries, Bing 4I	50,788	59,270		110,058
624F954017	Cherries, Bing 4F	41,825	48,811		90,636
624C954017	Cherries, Bing 4C	32,863	38,351		71,214
620B914003	Applesauce 12oz BR* 0B	1,610	2,007		3,617
620B914004	FrtCktail HS 12 oz BR* 0B	1,187	1,302		2,489
620A914003	Applesauce 12oz BR* 0A	805	1,003		1,809
620B914015	Peach Hlvs LS 12 oz BR* 0B	596	664		1,260
620A914004	FrtCktail HS 12 oz BR* 0A	594	651		1,244
620B914001	Pear Hlvs LS 12 oz BR* 0B	440	539		979
620A914015	Peach Hlvs LS 12 oz BR* 0A	298	332		630
620A914001	Pear Hlvs LS 12 oz BR* 0A	220	270		490
622H974304	Peach Slcs LS 106oz PL* 2H				
622I974304	Peach Slcs LS 106oz PL* 2I				
624A954025	Mand Org Pcs 106oz BR* 4A				
624B954025	Mand Org Pcs 106oz BR* 4B				
Grand Total		994,257	1,150,377		2,144,634

Example 2

In the next example, Customer Class is displayed on rows. Years and Quarters are on columns. The existing values for all quarters of 2015 can be updated. The blank cells for 2016 cannot be updated since all the valid dimensions for Plan Units Working must be represented in this view in order to update blank or zero cells.

		2015				2016						
	Y Year >>	Quarters >>	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2015 Total	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2016
Y Customer Class	C Clas Long Description	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
90	US Customer	15,313,519	24,300,543	30,807,092	13,371,207	83,792,361						
91	CAN Customer	664,685	993,420	1,391,344	610,828	3,660,276						
Grand Total		15,978,204	25,293,963	32,198,435	13,982,035	87,452,637						

Example 3

The view that follows represents all the valid hierarchies for Plan Units Working - Customer Class, Product, and Region. Therefore, it meets the requirements for planning on zero and blank values in detail cells* as well as planning on existing values in detail cells. This view setup also meets requirements for planning on existing values in subtotal and total cells that are on the axis opposite from measure items – in this case, you can plan on those subtotal and total cells on rows but not on columns since measure items are on columns.* Notice that the view does not need to display the lowest level of the time hierarchy. Only the Year level is displayed. When you change blank or zero values and the view is not drilled to the lowest level of time, the values you enter will be evenly divided among all periods, in this case for the year.

***Note:** Total and subtotal cells with zero or blank values can never be updated – which is a standard rule for all planning views.

				Y Year >>		2015		2016			Grand Total
				Y Region >>		330	331	2015 Total	330	331	2016 Total
			Rgn Long Description	East	West			East	West		
Y Customer Class	C Clas Long Description	Y Product	Prod Long Description	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
90	US Customer	620B914003	Applesauce 12oz BR* 0B	2,007		2,007					2,007
		620B914004	FrtCktail HS 12 oz BR* 0B	1,302		1,302					1,302
		620B914015	Peach Hlvs LS 12 oz BR* 0B	664		664					664
		624C954017	Cherries, Bing 4C	27,579	7,203	34,782					34,782
		624D954019	Meatloaf, Frozen 4D	125,269	33,157	158,426					158,426
		624D954023	Sirloin Tips - USDA Grade A 4D	67,591	20,915	88,506					88,506
		90 Total		224,412	61,275	285,687					285,687
91	CAN Customer	620B914003	Applesauce 12oz BR* 0B								
		620B914004	FrtCktail HS 12 oz BR* 0B								
		620B914015	Peach Hlvs LS 12 oz BR* 0B								
		624C954017	Cherries, Bing 4C	692	2,878	3,570					3,570
		624D954019	Meatloaf, Frozen 4D	9,546	6,843	16,390					16,390
		624D954023	Sirloin Tips - USDA Grade A 4D	5,253	3,230	8,484					8,484
		91 Total		15,492	12,951	28,443					28,443
Grand Total				239,904	74,226	314,130					314,130

Example 4

Here is a slightly different set up for the view using all the valid hierarchies for Plan Units Working. Region is in the View Filter, filtered by a single member. Customer Class and Product are on rows and their display text is set to their Long Description attribute relationships rather than their values. Year and Months from the Year Months hierarchy are displayed in columns. This example meets the requirements for planning on zero and blank values in detail cells as well as planning on existing values in detail cells. It also meets the requirements for planning on existing values in subtotal and total cells on the axis opposite from measure items (rows is the opposite axis in this case).

		2015												2016		
Year >>		January	February	March	April	May	June	July	August	September	October	November	December	2015 Total	January	February
Customer Class	Product	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
US Customer	Applesauce 12oz BR* 0B	194	3	73		273	406	34	129	880		6	10	2,007		
	FrtCktail HS 12 oz BR* 0B		20	212	526				240		89	215		1,302		
	Peach Hlvs LS 12 oz BR* 0B		4			279			369			11		664		
	Cherries, Bing 4C	2,628	234	2,392	3,433	2,700	2,362	3,788	8,065	2,629	2,423	2,342	1,787	34,782		
	Meatloaf, Frozen 4D	7,255	734	8,274	11,180	12,594	14,138	22,273	25,196	20,829	11,298	12,350	12,306	158,426		
	Sirloin Tips - USDA Grade A 4D	10,658	924	11,297	11,049	9,325	9,122	8,910	10,446	6,129	3,626	3,604	3,417	88,506		
	US Customer Total	20,734	1,919	22,247	26,187	25,171	26,027	35,006	44,446	30,467	17,436	18,527	17,520	285,687		
CAN Customer	Applesauce 12oz BR* 0B															
	FrtCktail HS 12 oz BR* 0B															
	Peach Hlvs LS 12 oz BR* 0B															
	Cherries, Bing 4C	151	18	578		503		453	859	522		245	240	3,570		
	Meatloaf, Frozen 4D	600	25	1,772	1,263	1,101	2,079	1,208	3,016	2,276	635	634	1,781	16,390		
	Sirloin Tips - USDA Grade A 4D	853	65	583	605	803	460	1,069	715	2,438	426	287	180	8,484		
	CAN Customer Total	1,604	108	2,933	1,868	2,407	2,539	2,730	4,590	5,237	1,061	1,166	2,201	28,443		
Grand Total		22,338	2,027	25,180	28,055	27,578	28,566	37,735	49,035	35,703	18,496	19,693	19,721	314,130		

Example 5

In this example, time hierarchies exist on both the row and column axes. When time hierarchies exist on both axes, planning updates can be made only to cells with existing data. Zero or blank cells cannot be updated.

Customer Class >>	90							91
CClas Long Description	US Customer							CAN Custor
Region >>	330			331			90 Total	330
Rgn Long Description	East			West				East
Year >>	2015	2016	330 Total	2015	2016	331 Total		2015
Months	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
January	6,265,031		6,265,031	840,197		840,197	7,105,228	150
February	472,654		472,654	69,341		69,341	541,995	10
March	6,770,714		6,770,714	895,582		895,582	7,666,296	177
April	7,444,968		7,444,968	1,066,496		1,066,496	8,511,463	144
May	6,961,151		6,961,151	1,024,468		1,024,468	7,985,618	196
June	6,853,837		6,853,837	949,624		949,624	7,803,462	169
July	8,956,844		8,956,844	1,198,868		1,198,868	10,155,712	249
August	9,628,986		9,628,986	1,511,774		1,511,774	11,140,760	208
September	8,408,708		8,408,708	1,101,911		1,101,911	9,510,619	289
October	3,814,503		3,814,503	593,010		593,010	4,407,513	106
November	4,095,975		4,095,975	570,267		570,267	4,666,242	99
December	3,619,519		3,619,519	677,933		677,933	4,297,452	115

Example 6

The final example has a level displayed on rows that is a hierarchy-enabled attribute relationship for Product, which is one of the valid hierarchies for the Plan Units Working's measure Category. Planning can be done on the existing values in the detail and total cells. Planning cannot be done on zero or blank values in this view because not all of the dimensions for Plan Units Working are visible in the view.

Year >>	2015	2016	Grand Total
Product ABC Class	Plan Units Working	Plan Units Working	Plan Units Working
A	30,093,735		30,093,735
B	31,249,876		31,249,876
C	14,811,853		14,811,853
D	11,297,173		11,297,173
Grand Total	87,452,637		87,452,637

Valid Cell Selections when Pasting Planning Values into Views

A set of examples follows to show you that various types of cell selections that are valid for pasting a single value or multiple values into a planning view. For common questions about pasting values, see these topics:

- [Why is a 'Read Only' Message Displaying?](#)
- [Why is a 'Select an Area to Paste' Message Displaying?](#)
- [Why is an 'Information Cannot be Pasted' Message Displaying?](#)
- [Why is an 'Invalid Selection to Paste' Message Displaying?](#)

Examples – Pasting a Single Value

A single value can be pasted into a single cell, multiple adjacent cells, or multiple non-adjacent cells. Consider a case where the following value was copied from another measure item in a view. Examples follow that show that value being copied into one and then multiple cells.

				Quarters >>		First Quarter					
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61		
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	51	
			Budget Budget Units Working			1,017,333	774,068	2,035,744	982,040	34	
		331	Actual Sales Sales Units			560,431	452,103	163,725	207,212	17	
			Budget Budget Units Working			380,399	300,808	114,057	136,031	11	
		100 Total	Actual Sales Sales Units			2,078,355	1,604,379	3,092,024	1,711,798	68	
			Budget Budget Units Working			1,397,732	1,074,876	2,149,801	1,118,070	46	
		Last Year Total	Actual Sales Sales Units			2,078,355	1,604,379	3,092,024	1,711,798	68	
			Budget Budget Units Working			1,397,732	1,074,876	2,149,801	1,118,070	46	
Current Year	100	330	Actual Sales Sales Units								

First, one cell was right-clicked and Paste was selected from the pop-up menu.

				Quarters >>		First Quarter					
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61		
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	51	
			Budget Budget Units Working	209,477	223,599	1,017,333	774,068	2,035,744	982,040	34	
		331	Actual Sales Sales Units			560,431	452,103	163,725	207,212	17	
			Budget Budget Units Working			380,399	300,808	114,057	136,031	11	
		100 Total	Actual Sales Sales Units			2,078,355	1,604,379	3,092,024	1,711,798	68	
			Budget Budget Units Working			1,397,732	1,074,876	2,149,801	1,118,070	46	
		Last Year Total	Actual Sales Sales Units			2,078,355	1,604,379	3,092,024	1,711,798	68	
			Budget Budget Units Working			1,397,732	1,074,876	2,149,801	1,118,070	46	
Current Year	100	330	Actual Sales Sales Units								

Here is the paste result.

				Quarters >>		First Quarter				
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61	
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	
			Budget Budget Units Working	209,477	343,418	1,017,333	774,068	2,035,744	982,040	
		331	Actual Sales Sales Units	134,355	110,373	560,431	452,103	163,725	207,212	
			Budget Budget Units Working	90,754	74,700	380,399	300,808	114,057	136,031	
		100 Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	
			Budget Budget Units Working	300,231	298,299	1,397,732	1,114,876	2,149,788	1,118,070	
		Last Year Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	
			Budget Budget Units Working	300,231	298,299	1,397,732	1,114,876	2,149,788	1,118,070	
Current Year	100	330	Actual Sales Sales Units							
			Budget Budget Units Working							
		331	Actual Sales Sales Units							
			Budget Budget Units Working							

Next, three adjacent cells were selected for the Paste area.

				Quarters >>		First Quarter				
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61	
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	
			Budget Budget Units Working	209,477	343,418	1,017,333	774,068	2,035,744	982,040	
		331	Actual Sales Sales Units	134,355	110,373	560,431	452,103	163,725	207,212	
			Budget Budget Units Working	90,754	74,700	380,399	300,808	114,057	136,031	
		100 Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	
			Budget Budget Units Working	300,231	298,299	1,397,732	1,114,876	2,149,788	1,118,070	
		Last Year Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	
			Budget Budget Units Working	300,231	298,299	1,397,732	1,114,876	2,149,788	1,118,070	
Current Year	100	330	Actual Sales Sales Units							
			Budget Budget Units Working							
		331	Actual Sales Sales Units							
			Budget Budget Units Working							

Here is the paste result.

				Quarters >>		First Quarter				
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61	
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	
			Budget Budget Units Working	209,477	343,418	1,017,333	774,068	2,035,744	982,040	
		331	Actual Sales Sales Units	134,355	110,373	560,431	452,103	163,725	207,212	
			Budget Budget Units Working	90,754	74,700	380,399	343,418	343,418	343,418	
		100 Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	
			Budget Budget Units Working	300,231	298,299	1,397,732	1,114,876	2,149,788	1,118,070	

Finally, two non-adjacent cells were selected for the Paste area. The first cell that was selected has a blue background, and the second cell that was selected has a black border but no special background shading.

			Quarters >>	First Quarter						
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61	62
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	513,763
			Budget Budget Units Working	209,477	343,418	1,017,333	774,068	2,035,744	982,040	348,367
		331	Actual Sales Sales Units	134,355	110,373	560,431	452,103	163,725		
			Budget Budget Units Working	90,754	74,700	380,399	343,418	343,418		
		100 Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024		
			Budget Budget Units Working	300,231	298,299	1,397,732	1,074,876	2,145,500		
		Last Year Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024		
			Budget Budget Units Working	300,231	298,299	1,397,732	1,074,876	2,145,500		
Current Year	100	330	Actual Sales Sales Units							
			Budget Budget Units Working							

Here is the paste result.

			Quarters >>	First Quarter						
Year Based	Company	Region	Product Family >>	30	31	50	51	60	61	62
Last Year	100	330	Actual Sales Sales Units	321,739	343,418	1,517,924	1,152,276	2,928,299	1,504,586	513,763
			Budget Budget Units Working	209,477	343,418	1,017,333	343,418	2,035,744	982,040	343,418
		331	Actual Sales Sales Units	134,355	110,373	560,431	452,103	163,725	207,212	174,402
			Budget Budget Units Working	90,754	74,700	380,399	343,418	343,418	343,418	113,505
		100 Total	Actual Sales Sales Units	456,094	453,790	2,078,355	1,604,379	3,092,024	1,711,798	688,166
			Budget Budget Units Working	300,231	298,299	1,397,732	1,074,876	2,145,500	1,711,798	688,166

Examples – Pasting Multiple Values

When multiple values are used for a copy and paste, the copy and paste selection areas must match in size and shape. For example, Actual Sales Units values from a 3 by 1 block of cells were copied in this first example.

			☿ Quarters >>	Third Quarter					
☿ Year Based	Company	Region	Product Family >>	30	31	50	51	60	61
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,543	1,405,295	2,952,679	2,472,160
			Budget Budget Units Working	654,392	651,733	1,393,894	1,091,306	2,187,076	1,895,499
		331	Actual Sales Sales Units	226,494	248,722	571,836	451,190	168,598	323,231
			Budget Budget Units Working	180,881	183,941	457,156	355,616	124,241	250,038
		100 Total	Actual Sales Sales Units	1,072,762	1,074,528	2,379,379	1,856,485	3,120,277	2,795,392
			Budget Budget Units Working	835,273	835,674	1,850,050	1,446,922	2,304,517	2,145,537
		Last Year Total	Actual Sales Sales Units	1,072,762	1,074,528	2,379,379	1,856,485	3,120,277	2,795,392
			Budget Budget Units Working	835,273	835,674	1,850,050	1,446,922	2,304,517	2,145,537

An area of the same size and shape was selected in order to update Budget Units Working values.

			☿ Quarters >>	Third Quarter					
☿ Year Based	Company	Region	Product Family >>	30	31	50	51	60	61
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,543	1,405,295	2,952,679	2,472,160
			Budget Budget Units Working	654,392	651,733	1,393,894	1,091,306	2,187,076	1,895,499
		331	Actual Sales Sales Units	226,494	248,722	571,836	451,190	168,598	323,231
			Budget Budget Units Working	180,881	183,941	457,156	355,616	124,241	250,038
		100 Total	Actual Sales Sales Units	1,072,762	1,074,528	2,379,379	1,856,485	3,120,277	2,795,392
			Budget Budget Units Working	835,273	835,674	1,850,050	1,446,922	2,304,517	2,145,537
		Last Year Total	Actual Sales Sales Units	1,072,762	1,074,528	2,379,379	1,856,485	3,120,277	2,795,392
			Budget Budget Units Working	835,273	835,674	1,850,050	1,446,922	2,304,517	2,145,537
Current Year	100	330	Actual Sales Sales Units						

Here is the paste result.

			☿ Quarters >>	Third Quarter					
☿ Year Based	Company	Region	Product Family >>	30	31	50	51	60	61
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,543	1,405,295	2,952,679	2,472,160
			Budget Budget Units Working	654,392	651,733	1,807,543	1,405,295	2,952,679	1,895,499
		331	Actual Sales Sales Units	226,494	248,722	571,836	451,190	168,598	323,231
			Budget Budget Units Working	180,881	183,941	457,156	355,616	124,241	250,038

In this example, values from two adjacent cells in a row were copied.

				☿ Quarters >>			
				Third Quarter			
☿ Year Based	Company	Region	Product Family >>	30	31	50	51
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,543	1,405,29
			⚡ Budget Budget Units Working	654,392	651,733	1,807,543	1,405,29
		331	Actual Sales Sales Units	226,494	248,722	571,836	451,19
			⚡ Budget Budget Units Working		941	457,156	355,61
		100 Total	Actual Sales Sales Units		528	2,379,379	1,856,48
			Budget Budget Units Working		674	1,851,050	1,446,92
	Last Year Total		Actual Sales Sales Units		528	2,379,379	1,856,48
			Budget Budget Units Working		674	1,851,050	1,446,92
Current Year	100	330	Actual Sales Sales Units				
			⚡ Budget Budget Units Working				

The user then right-clicked in a single cell elsewhere in the grid and chose Paste from the pop-up menu.

				☿ Quarters >>			
				Third Quarter			
☿ Year Based	Company	Region	Product Family >>	30	31	50	
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,543	
			⚡ Budget Budget Units Working	654,392	651,733	1,807,543	
		331	Actual Sales Sales Units	226,494	248,722	571,836	
			⚡ Budget Budget Units Working	180,881	183,941	457,156	
		100 Total	Actual Sales Sales Units		2	1,074,528	2,379,379
			Budget Budget Units Working		3	835,674	1,851,050
	Last Year Total		Actual Sales Sales Units		2	1,074,528	2,379,379
			Budget Budget Units Working		3	835,674	1,851,050
Current Year	100	330	Actual Sales Sales Units				
			⚡ Budget Budget Units Working				
		331	Actual Sales Sales Units				

Stratum.Viewer calculated the paste area in this case, using the single cell as the starting point of the paste and moving right to the next available cell. If any cells in the area calculated by Stratum.Viewer had been read only or had not met planning requirements, then the paste would not have been completed. A message would display explaining why the paste could not be completed.

				Quarters >> Third Quarter		
Year Based	Company	Region	Product Family >>	30	31	50
Last Year	100	330	Actual Sales Sales Units	846,268	825,805	1,807,54
			Budget Budget Units Working	654,392	651,733	1,807,54
		331	Actual Sales Sales Units	226,494	248,722	571,83
			Budget Budget Units Working	226,494	248,722	457,11
		100 Total	Actual Sales Sales Units	1,072,762	1,074,528	2,379,37
			Budget Budget Units			

Windows

Application Window

General Section

Application

Save ? 1

General

Name: 2

Global Home Page:

3 Background Color: ...

Background Picture:

4 Remove Picture?

Page Size: ▾

5 Customer Number:

Registration Key:

1	<p>Toolbar -</p> <ul style="list-style-type: none"> Save - Click to save changes to application settings. Help - Click to open help that is specific to working with application settings.
2	<p>Name - Use this field to customize the name that displays for the application in the browser title bar and tab.</p>

	<p>Global Home Page - Use this field to define a custom, global home page for Stratum.Viewer. The home page can open to a web site, document, directory, or other supplementary information that would be meaningful for users.</p> <p>If you leave this field blank, the application home page defaults to a Stratum home page that has links to Stratum.Viewer videos and other resources.</p> <p>If needed, administrators can define different home pages for particular users or user groups through settings in the User Profile or User Profile Group windows.</p>
<p>3</p>	<p>Background Color and Background Picture - Use these settings to control the background of the home page and grid area. Use the respective Browse buttons to browse to a color selection window or to browse to an image file. If you choose an image file, it will repeat as needed to fill up the size of the background area.</p> <p>To remove a background picture, select the Remove Picture? checkbox.</p>
<p>4</p>	<p>Page Size - This setting controls how many objects display per page in windows where lists of objects display. For example, the setting controls page size in the View list, User List, Role, Select Members, Select User, and Select User List Filter windows. There are many page sizes to choose from, as low as 25 or as high as 5000 objects per page.</p>
<p>5</p>	<p>Customer Number - This is a unique identification number for your Stratum.Viewer implementation. Contact Silvon Support at (800) 474-5866 or product.support.usa@silvon.com if you do not have a valid customer number.</p> <p>Registration Key – A valid registration key is required for licensed copies of Stratum.Viewer. If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or product.support.usa@silvon.com.</p>

View Groups and Views Sections

The screenshot displays two configuration panels. The top panel, labeled 'View Groups' with a red circle '1', contains a preview of 'Sample text for view groups.' in a blue box. Below the preview are fields for 'Font Name' (Mangal), 'Font Type' (checkboxes for Bold, Italic, Underline), 'Font Size' (11), and 'Text Color' (FFFFFF). The bottom panel, labeled 'Views' with a red circle '2', contains a preview of 'Sample text for views.' in blue. Below the preview are fields for 'Font Name' (Verdana), 'Font Type' (checkboxes for Bold, Italic, Underline), 'Font Size' (10), 'Text Color' (004080), a 'Logo' field with a 'Browse...' button, a 'Remove Picture?' checkbox, and 'Page Size' settings for 'Rows' (20) and 'Columns' (5).

<p>1</p>	<p>View Groups - This section controls the format of view group names in the left panel. You can customize the font style (name), type (Bold, Italic, Underline), size, and color. A preview of what the name will look like as you change the settings displays above the Font Name field.</p>
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2

Views - The first few settings in this section control the format of view names in the left panel. You can customize the font style (name), type (Bold, Italic, Underline), size, and color. A preview of what the name will look like as you change the settings displays above the Font Name field.

You can also specify an image to display as a logo in views. The image will display near the view name in the grid when users run views. Use the Browse button to browse to an image file. The file will be copied to the application folder. To remove a logo, select the Remove Picture? checkbox.

The Page Size setting controls how many rows and columns display per page for views that use paging. Enter a numeric value in the Rows and Columns fields. Security administrators can define different view page sizes for particular users through User Profile settings. Individual users can override administrator settings and define their own, custom view page sizes for all views through an override setting in their User Options or for individual views through a view's Display Options.

Excel Files Section


1

Font Name and Size – Click the Change button and use the Select Font window to control the font type for data for Excel spreadsheets generated by Stratum.Viewer's Export to Excel and Stratum.Broadcast Server functionality. To control the font size of that data, enter the numeric size in the Font Size field,

Measure Item Caption Expression Section

1

Settings in the Measure Item Caption Expression section control the captions that will be assigned to new measure items created in views by default. Users can customize captions within each view if they prefer a caption other than the application default. If you change the application default, the captions of existing measure items will remain as is. Only new measures items added to views after your change will be assigned the new default. You can set up unique caption defaults for each type of measure item.

The fields in this section are read only, but you can click the Browse button  next to each field to access the Caption Expression window and customize the caption default.

- **Regular with Time Range** - The expression that will determine caption defaults of regular measure items with time ranges. The default will be the following unless you make adjustments to this application setting.

[Measure][From Period Short Desc] [From Year YYYY] to [To Period Short Desc] [To Year YYYY]

- **Regular** - The expression that will determine caption defaults of regular measure items without time. The default will be the following unless you make adjustments to this application setting.

	<p>[Measure]</p> <ul style="list-style-type: none"> • Calculated - The expression that will determine caption defaults of calculated measure items. The default will be the following unless you make adjustments to this application setting. <p>[Name]</p>
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Data Management Section

Data Management

1 Upload File Location:

<p>1</p>	<p>Upload File Location – This property is applicable when Data Import functionality is used with your implementation. The location is used when the import files containing your data are uploaded.</p> <ul style="list-style-type: none"> • When specifying the location, use the full UNC path format \\host-name\share-name\file_path\ and include a backslash mark \ as the final character. For example: \\serverabc\D\$\User Controlled Data\Uploaded Import Files\ • The location must be one that exists already and one for which your implementation's Viewer Impersonation account has access rights (read and write access). See account access requirements defined in the Data Import section of help.
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Stratum.Viewer Server Section

Stratum.Viewer Server

1 SMTP Server:

<p>1</p>	<p>SMTP Server - This setting controls how Stratum.Viewer delivers the emails that it generates. The property defaults to a "localhost" value, in which case Stratum.Viewer emails will be delivered using the SMTP configurations for the server where Stratum.Viewer resides.</p> <p>If you plan to use an SMTP server other than the default for delivering Stratum.Viewer generated emails, enter that server name in the SMTP Server field. Enter the server name in a format that will be recognized by your network. For example, the server name or IP address or in the format of server name.network name.com.</p> <hr/> <p>Note: If you are not sure which default SMTP server is used for the Stratum.Viewer server, access Microsoft Internet Information Services Manager on the server and look at the Default SMTP Virtual Server settings.</p>
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Broadcast Server Section

Broadcast Server	
Registration Key:	<input type="text"/>
<input type="checkbox"/> Override Log File Location:	C:\Program Files\Silvon Software\Stratum.Viewer\Logs
Subject Prefix when no Data Exists:	**No Data Exists**

1	<p>Registration Key – A valid key is required to activate licensed copies of Broadcast Server (which includes features such as broadcast schedules, broadcast groups, and actions processing). If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or product.support.usa@silvon.com. If your company is not using Broadcast Server, leave this key field blank.</p>
2	<p>Override Log File Location – This property can be used to customize where log files from Broadcast Server processing are stored. The logs are from the processing of broadcast schedules, broadcast groups, and actions. By default, logs are stored in the ‘Logs\Broadcast Server’ sub-folder in the directory where your Stratum.Viewer implementation is installed. If you want to change the log file location, select the Override Log File Location checkbox and enter the location in the related field. The location you specify must exist already and be one to which your company’s Action Processing Account has access rights.</p>
3	<p>Subject Prefix when no Data Exists – This text controls the default subject prefix for emails of actions that would generate blank results – an action where no data is available to generate a report. Those cases occur when an Email action would result in no data to send to the designated user or a File action would result in no data in the resulting shared file. For example, if there are no rows and columns returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than \$40,000.</p> <p>The prefix is only used when an action’s “Send Email when no Data Exists” property has been set to Yes and when no data exists. The prefix defined here will be used in the action email subject line before the rest of the Subject field text unless the user customized the prefix text for their specific action.</p> <p>Note: If a user sets an action’s “Send Email when no Data Exists” property to No and a no data case occurs, then no email will be generated by the action.</p>

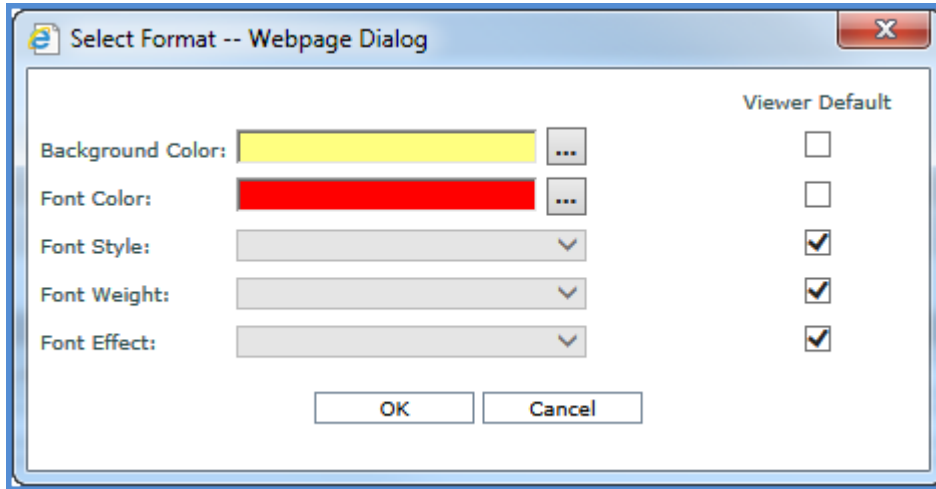
Planning Section

Planning	
Registration Key:	<input type="text"/>
Planning Update Format:	1234.10 <input type="button" value="..."/>

1	<p>Registration Key – A valid key is required to activate licensed copies of Planning. If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or product.support.usa@silvon.com. If your company is not using Planning, leave this key field blank.</p>
2	<p>The Planning Update Format property controls the cell and text formatting that will be applied in a measure item’s cell when planning updates are made in a view. Click the Browse button <input type="button" value="..."/> to access the Select Format window. In that window, you can edit the cell background color and the font color, style, weight, and effect. In the example below, cells will be assigned a yellow background and text will appear in red, bold font when planning updates are made.</p>

These administrative settings control the format of planning updates for all users. Security administrators can define different planning update formats for particular users through User Profile settings. Individual users can override administrator settings and define their own, custom planning format through an override setting in their User Options.

Note: The Planning Update formats only apply to pending planning changes. For example, once you submit your planning changes and the grid refreshes, changed values will display in the same standard format as other values in the grid.



Microsoft Analysis Services Sections

Microsoft Analysis Services	
Connection Pool Maximum Connections Per Role:	5
Connection Pool Idle Connection Time Limit:	600
Command Time Limit:	600

1

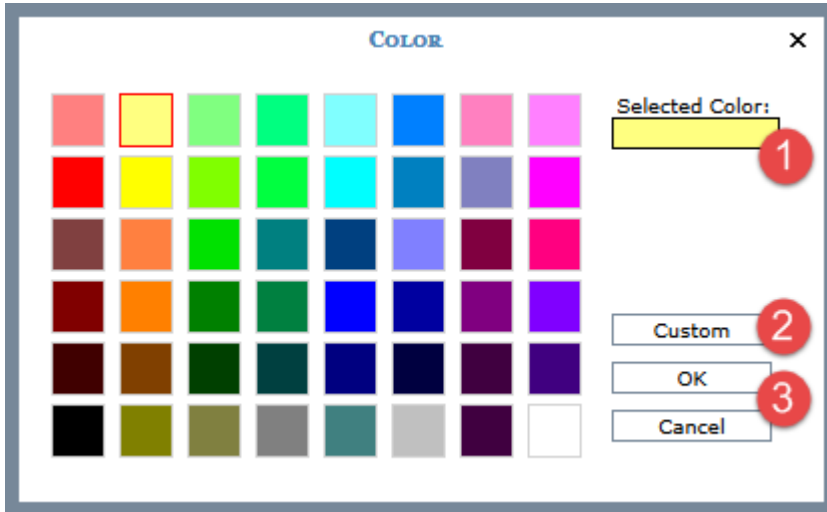
1

Microsoft Analysis Services -

- **Connection Pool Settings** - Connection pools for Stratum.Viewer are managed via Stratum.Viewer rather than via Microsoft Analysis Services. To support this connection pooling, two parameters are available. The settings determine how many connection pool connections can exist for each user's role and how long idle connections can be left open before Stratum.Viewer closes them.
 - **Connection Pool Maximum Connections Per Role** - The value for this parameter determines how many open connections will be maintained in the connection pool for each user's role. The default and recommended value is 5. That means that a maximum of five open data connections will be maintained in the pool for each user's role. In most cases, this setting allows for an optimal balance between the performance time of connecting to retrieve data from the Stratum.Connector for Viewer Analysis Services database and the resources required on the Stratum.Viewer server to maintain the connection pool.
 - **Connection Pool Idle Connection Time Limit** - The value for this parameter determines how many seconds a connection can remain idle before its times out and is removed from the connection pool. The default and recommended value is 600. In most cases, this setting allows for an optimal balance between the performance time of connecting to retrieve data from the Stratum.Connector for Viewer Analysis Services database and the resources required on the Stratum.Viewer server to maintain the connection pool.

- **Command Time Limit** – This setting should **not** be changed unless you are directed to by Silvon Support. The setting impacts how long parts of processes handled by Stratum.Connector for Viewer are given to complete those parts before the process times out.

Color Window

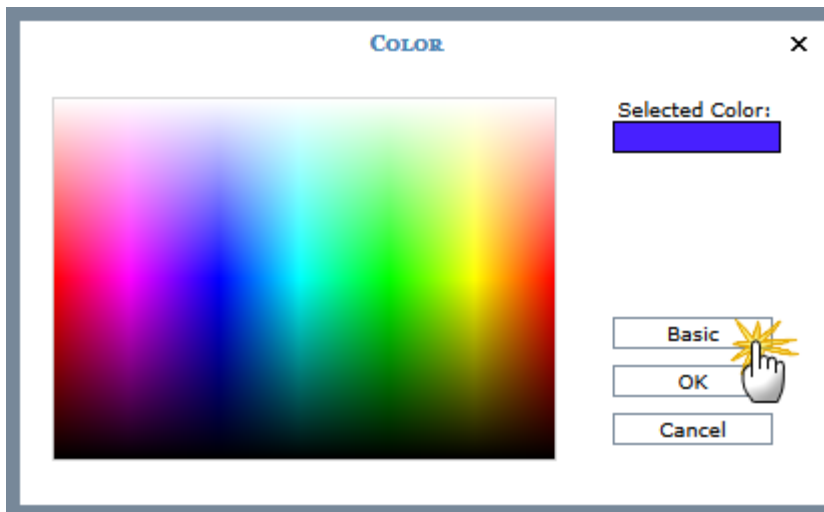


1

Selected Color – The color selected from the basic color palette displays here.

2

Custom – To define your own custom color, click the Custom button and click the desired color from the provided palette. The Custom / Basic button works as a toggle switching between the two different versions of the window.



3

OK – Click OK to accept your color selection and close the window.

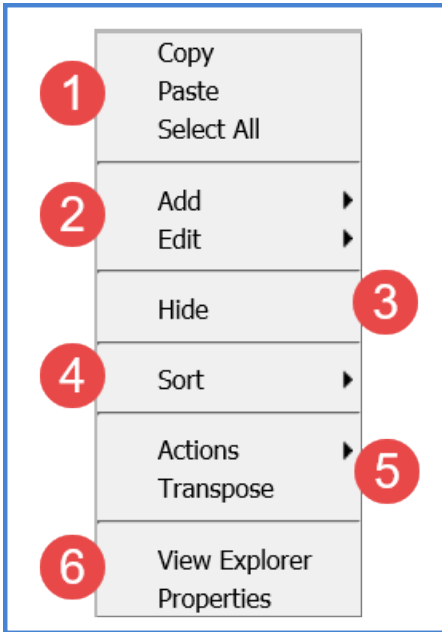
Cancel – Click Cancel to ignore any selections and close the window.

Grid Pop-up Menu

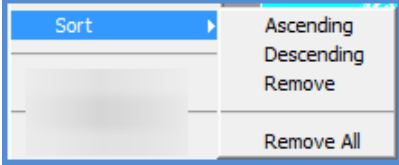
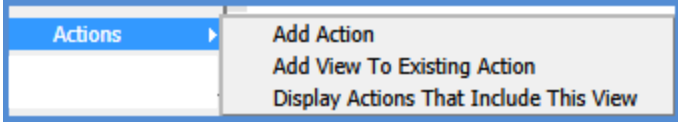
Right-click objects in views to display available functionality for them such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes.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

Attribute Relationships Pop-up Menu

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

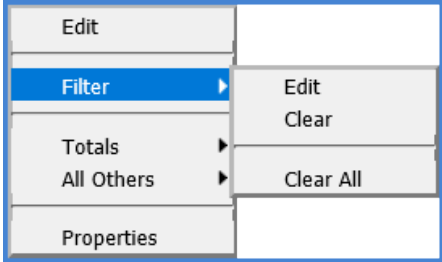


<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Add - The sub menu has options for adding Attribute Relationships, Regular Measure Items, Calculated Measure Items, and Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.</p> <div data-bbox="263 1507 846 1692" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div> <p>Edit - Edit the attribute relationships or edit hierarchies on the rows, columns, or view filter.</p> <div data-bbox="263 1755 873 1913" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div>

<p>3</p>	<p>Hide - When an attribute relationship is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the attribute relationship changes to No. From view explorer, you can drag an attribute relationship back in the grid if needed, or you can change the Visible property to Yes.</p>
<p>4</p>	<p>Sort - Sort options are Ascending, Descending, Remove, and Remove All.</p> 
<p>5</p>	<p>Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.</p>  <p>Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.</p>
<p>6</p>	<p>View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.</p> <p>Properties - Click to maintain the attribute relationship properties including sorting and whether it is visible or not.</p>

Axis Pop-up Menu

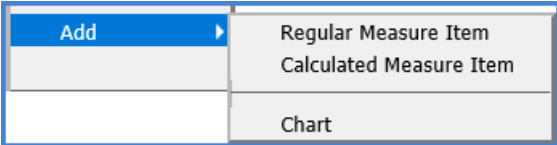
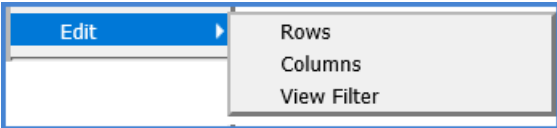
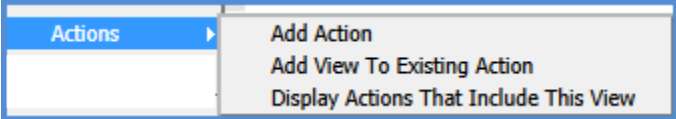
Right-click the Rows or Columns headings in the Navigation Panel (or their filter icon if an axis is filtered) to display a menu with options to edit properties of that axis including its filter, totals, or All Others properties. A shortcut to adding hierarchies to the Rows or Columns of a view is to click the Add icon + in those sections of the Navigation Panel.



General Pop-up Menu

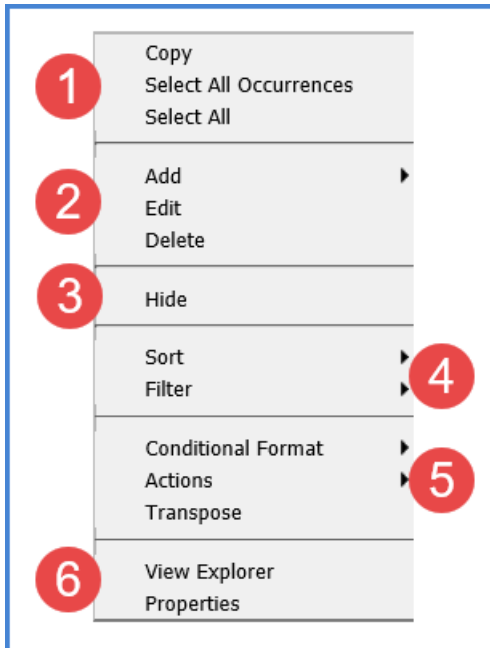
Right-click within the grid to display actions that you can take such as transposing the rows, columns, and measure items.



<p>1</p>	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p>
<p>2</p>	<p>Add - The sub menu has options for adding Regular Measure Items, Calculated Measure Items, and Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.</p>  <p>Edit - Edit the hierarchies on the rows, columns, or view filter.</p> 
<p>3</p>	<p>Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.</p>  <p>Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.</p>
<p>4</p>	<p>View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.</p>



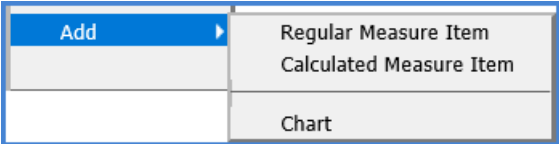
Measure Item Pop-up Menu (Detail and Grand Total Menus)

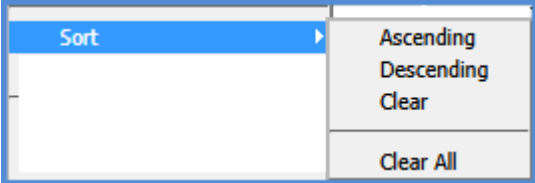
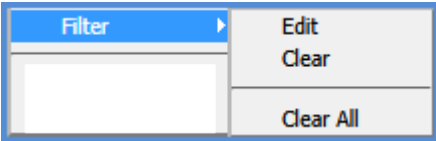
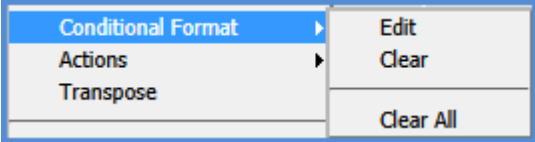
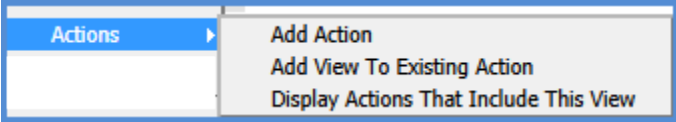
Measure items can be assigned to one axis, either rows or columns. Right-click the caption of a measure item in a detail row or column to display actions that you can take related to that object, such as inserting additional measure items or applying conditional formats.



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

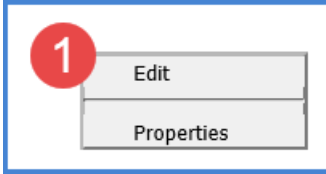
Descriptions follow of the menus for measure items in detail and Grand Total rows or columns.

	<p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. This option does not display on the menu for Grand Totals.</p> <p>Select All Occurrences - Use this option to select data for all occurrences of that measure item in the active page of the View. This option does not display on the menu for Grand Totals.</p> <p>Select All - Use this option to select the entire grid.</p>
	<p>Add - The sub menu has options for adding Regular Measure Items, Calculated Measure Items, and Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <p>Edit - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens an Edit window where you can edit the calculation, caption, and format for the calculated measure item.</p> <hr/> <p>Note: You also can access editing windows for measure items from the Measure Items window, which is accessible from view toolbars, or by double-clicking the caption of the respective measure item in the view grid.</p>

	<p>Delete - Deletes the measure item from the view definition without confirmation. It will no longer display in the view explorer.</p>
3	<p>Hide - When a measure item is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the measure item changes to No. From view explorer, you can drag a measure item back in the grid if needed, or you can change the Visible property to Yes.</p>
4	<p>Sort - Sort options are Ascending, Descending, Clear, and Clear All.</p>  <p>Filter - Filter options are Edit, Clear, and Clear All.</p> 
5	<p>Conditional Format – Use this option to edit or add conditional formatting on the measure item. There are also options for clearing the conditional format on the active measure item or all measure items.</p>  <p>Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.</p>  <p>Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.</p>
6	<p>View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.</p> <p>Properties - Click to maintain the measure item properties including the name, caption expression, type, pop-up labels, hyperlinks, and so forth.</p>

View Filter Pop-up Menu

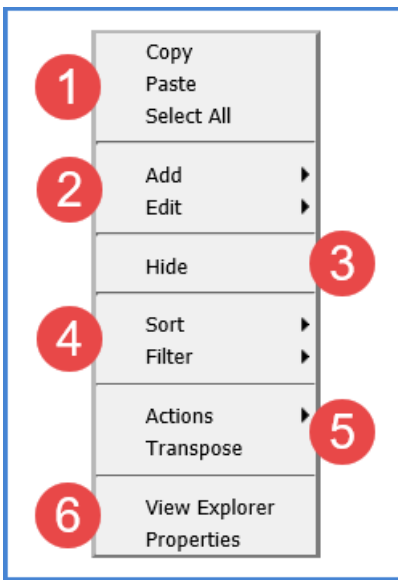
Right-click the View Filter heading to display actions that you can take related to that object or section of the grid, such as filtering levels in that section.

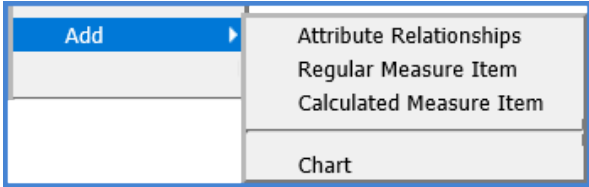


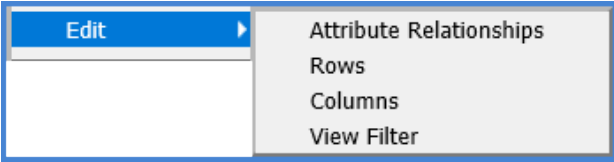
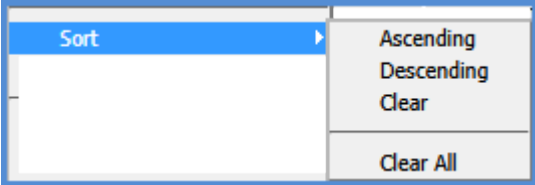
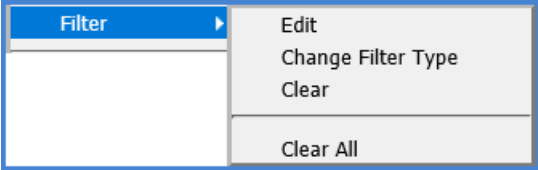
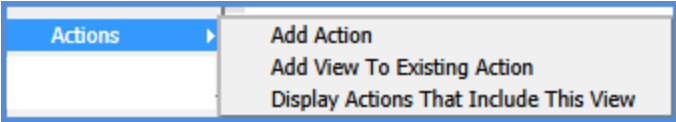
1	Edit - Edit the hierarchies in the view filter. A shortcut to adding hierarchies to the View Filter is to click the Add icon + that's provided in the View Filter section of the view.
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Levels Pop-up Menu

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

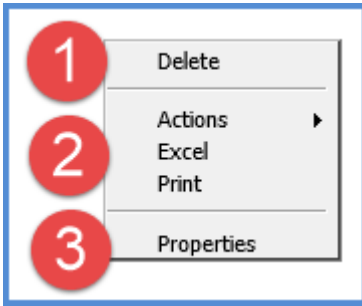


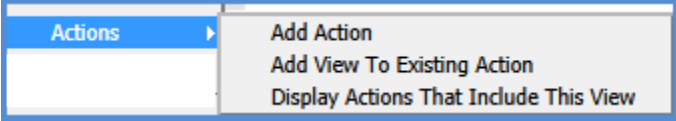
1	Copy - This option allows you to copy sections of a view that you have selected. Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. Select All - Use this option to select the entire grid.
2	Add - The sub menu has options for adding Attribute Relationships, Regular Measure Items, Calculated Measure Items, and Charts. Windows for adding the selected type of item will display once you make your selection from this sub menu.  Edit - Edit the attribute relationships or edit hierarchies on the rows, columns, or view filter.

	
<p>3</p>	<p>Hide - When a level is right-clicked and Hide is selected, the selected object is hidden from the grid. The Visible property for the level changes to No. From view explorer, you can drag a level back in the grid if needed, or you can change the Visible property to Yes.</p>
<p>4</p>	<p>Sort - Sort options are Ascending, Descending, Clear, and Clear All.</p>  <p>Filter - Filter options are Edit, Change Filter Type, Clear, and Clear All. Change Filter Type opens a window where you can select the type of filter to set up or change. By default, a new filter you create from the Filter > Edit option is a list of members from the level with which you are working.</p> 
<p>5</p>	<p>Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.</p>  <p>Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in columns are switched to display in rows and vice versa.</p>
<p>6</p>	<p>View Explorer - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.</p> <p>Properties - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text.</p>

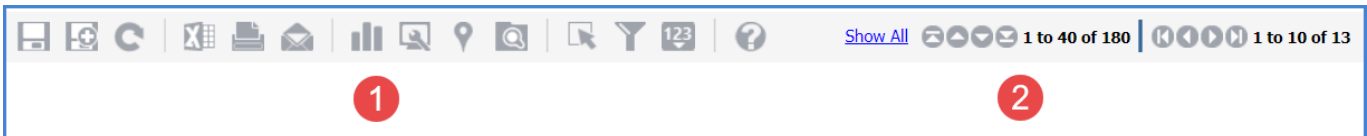
View Name Pop-up Menu





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












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

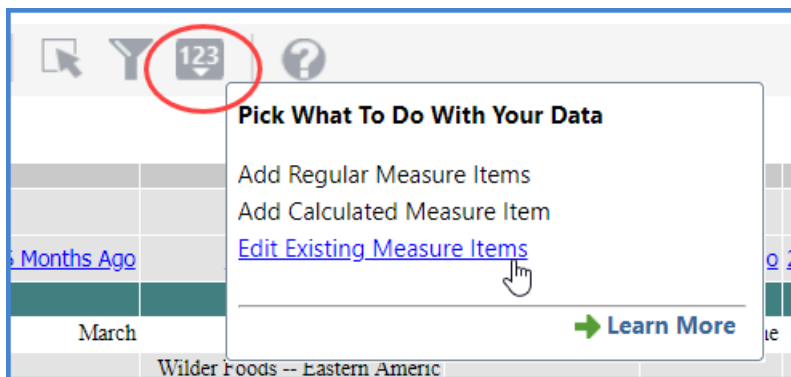
Grid Toolbar




1	<p>Toolbar Icons -</p> <ul style="list-style-type: none"> • Save This View  and Add New View (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. • Process Your Planning Changes  - 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. • Export to Excel  - Click to initiate an export of the view and chart to Microsoft Excel. If you choose to export the data as Excel Data instead of an Excel Report, the view data will be exported but charts and special formatting will not be exported. An Export Type property
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controls the Data versus Report option, and you can control that from Display Options or a Properties window in the view.

- **Print This Page**  - Click to print the active page of the view.
- **Email This Page**  - Click to access the window for emailing views.
- **Add Charts**  - Click to access a wizard for creating charts for the active view.
- **Edit Display Options**  - Click to open the Display Options window. Use it to control properties for the view grid. You can control items such as whether or not row and column headers are locked, the page size of the view, and the display of totals and all others values. Save the view if you want your display changes to be retained for the next time the view is run. From here, you also can display how data is exported during Exports to Excel (either Excel Data or Excel Report).
- **Show / Hide Navigation Panel**  - Use to open or close the Navigation Panel for a view. Use the panel to see the drilldown path for a view (what's available to drill to on rows or columns), change the drilldown path, and add or delete levels from the view.
- **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.
- **Select Parameter Values**  - Click to access the View Prompt window for parameters. This button only displays if parameters exist for the view.
- **Manage All Filters**  - Click to access the window for adding, clearing, or changing filters. This filter icon will be red when there are active filters in the view.
- **Pick What To Do With Your Data**  - Click to access the window for adding, changing and deleting measure items. The Measure Items window opens where you work with all measure items in the view. And you can add new measure items from scratch or by copying to create the new measure item.



- **Help**  - Click to access help that is specific to working in views.

2

Show All – Click to display all rows and all columns of the view. This option is only available when paging is enabled in a view and all rows or columns of the view do not fit on a single page. For example, if a view is set up to display 40 rows and 10 columns at a time then the Show All option would display if there is more than one page for the view. The Show All option will be displayed or hidden based on the current state of a view as it refreshes after filtering, drilling, or other changes made by a user.

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 on rows and columns respectively.

[Show All](#)

1 to 40 of 180 | 1 to 10 of 13

See All Rows / Columns

Temporarily switch from paging mode to single page mode and show all rows and columns at once.

[4 Months Ago](#) [3 Months Ago](#) [Next Month](#)

[Learn More](#)

May	June	July	August	September	October
1,779,654	2,792,228	4,121,924	2,903,001	2,472,048	1,308,738

Measure List Window

Measure

Current List: All Measures |

Category	Measure	Viewer Enabled	Planning Enabled	Planning Allowed	Data Copy Enabled	Data Copy Allowed
<input type="checkbox"/> Budget	Budget Budget Amount Frozen	Yes	Yes	No	No	No
<input type="checkbox"/> Budget	Budget Budget Amount Working	Yes	Yes	Yes	Yes	No
<input type="checkbox"/> Budget	Budget Budget ASP Frozen	Yes	Yes	No	Yes	No
<input type="checkbox"/> Budget	Budget Budget ASP Working	Yes	Yes	Yes	Yes	No
<input type="checkbox"/> Budget	Budget Budget Units Frozen	Yes	Yes	No	Yes	No
<input type="checkbox"/> Budget	Budget Budget Units Working	Yes	Yes	Yes	Yes	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budget Amt Working Calc	Yes	No	No	No	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budget Units Working Calc	Yes	No	No	No	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budgeted ASP Working Calc	Yes	No	No	No	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budget Amt Frozen Calc	Yes	No	No	No	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budget Units Frozen Calc	Yes	No	No	No	No
<input type="checkbox"/> Budget Calc Values	Budget Calc Values Budgeted ASP Frozen Calc	Yes	No	No	No	No
<input checked="" type="checkbox"/> Open Orders	Open Budget Amount	Yes	No	No	Yes	Yes
<input checked="" type="checkbox"/> Open Orders	Open Budget Units	Yes	No	No	Yes	Yes
<input checked="" type="checkbox"/> Web Cart Activity	Plan by Product Actual	Yes	Yes	Yes	Yes	Yes
<input checked="" type="checkbox"/> Web Cart Activity	Plan by Product In Process	Yes	Yes	Yes	Yes	Yes
<input checked="" type="checkbox"/> Web Cart Activity	Plan by Product Working	Yes	Yes	Yes	Yes	Yes

1 to 17 of 17

1	<p>Toolbar -</p> <ul style="list-style-type: none"> Edit - Select measures you want to edit properties for, then click Edit to open them in the Measure Maintenance window. Help - Click to open help that is specific to managing measures.
2	<p>Display Columns – Information on the page indicates the Category a measure belongs to and the status of its Viewer Enabled, Planning Enabled, Planning Allowed, Data Copy Enabled, and Data Copy Allowed properties.</p> <p>Viewer Enabled – A status of Yes means the applicable measure can be used to create measure items in views. No means the measure can't be used when adding measure items to views.</p>
3	<p>Planning Enabled and Planning Allowed – These properties impact the ability to edit measure data in Planning views. A measure must have a Planning Enabled status of Yes for you to be able to make it a Planning Allowed measure.</p>

- **Planning Enabled** – Yes means the measure has a status of Update Enabled in Stratum.Connector for Viewer. No means the Update Enabled property for the measure in Stratum.Connector is not selected.
- **Planning Allowed** – Yes means the measure can be edited in Planning views by users whose roles give them update authority to the measure. No means planning features will not be active for the measure in planning views. A lock icon displays in planning views next to measures that have a Planning Enabled status of Yes and Planning Allowed status of No. This can be used to temporarily disable Planning functionality for a measure to stop users from making any additional updates.

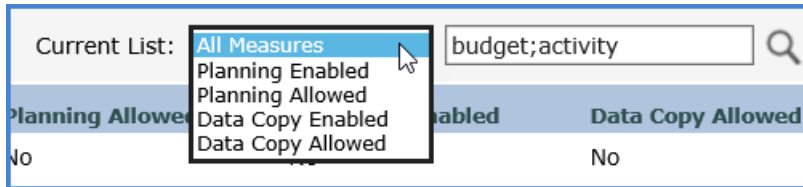
4

Data Copy Enabled and Data Copy Allowed – These properties impact the ability to use a measure as a Target for Data Copies. A measure must have a Yes for both of these properties for the measure to be available as a Target when copying data.

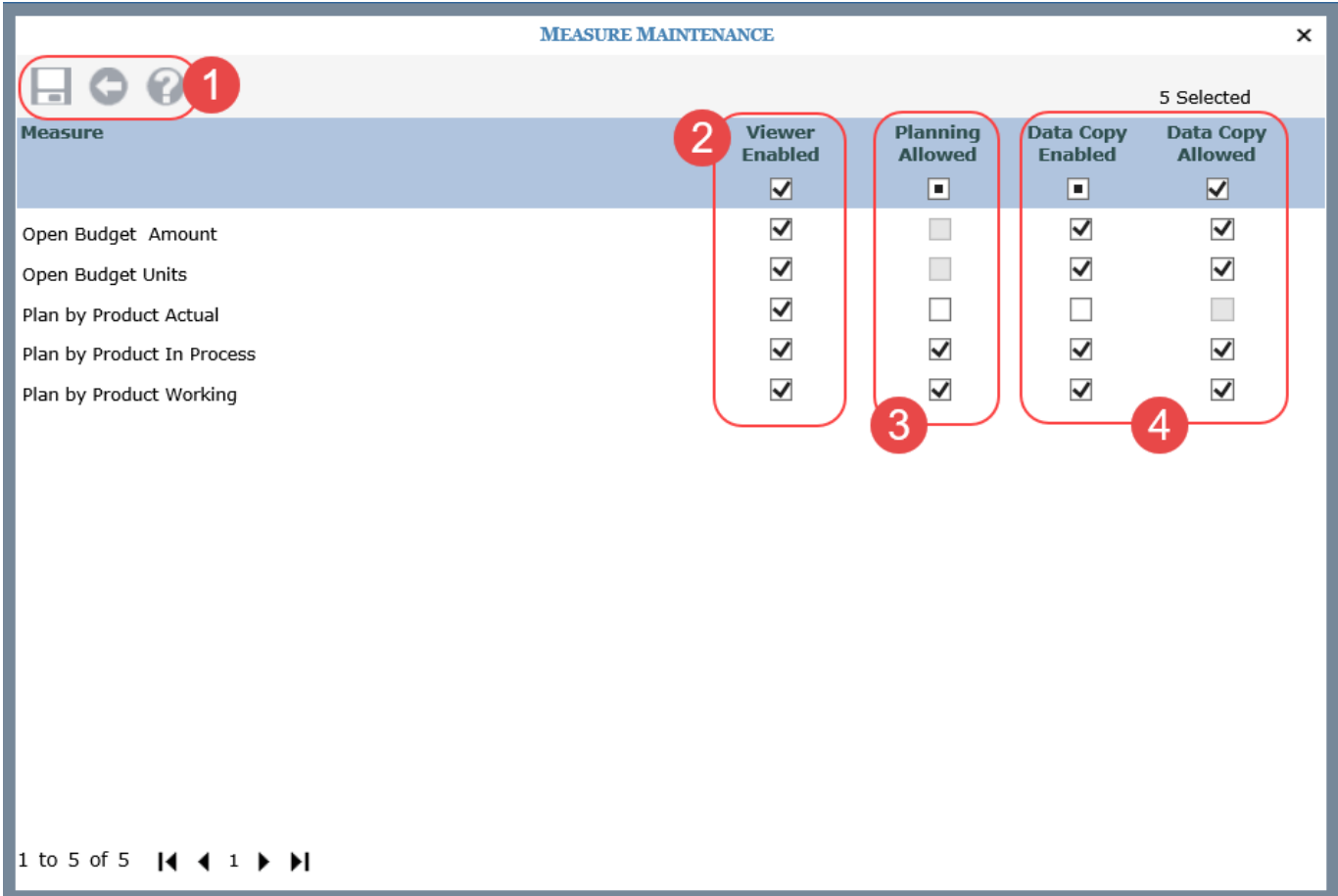
- **Data Copy Enabled** – Yes means measure can be updated by Data Copy. You will also need to set up authority to control which users are allowed to update Data Copy Enabled measures. Making a measure available as a Target measure is a two-step process of activating both its Data Copy Enabled and Data Copy Allowed properties. No means the measure is not enabled and also disables its Data Copy Allowed property.
- **Data Copy Allowed** – Yes means Data Copies can be processed for this measure. No means that Data Copies are not currently allowed for this measure. A setting of “No” can be used to “freeze” a measure by preventing any user from processing a Data Copy that would update this measure. Users can still select the measure as a Target and save the related Data Copy, but they cannot process it.

5

Filter and Search Options – You can search for measures to narrow down the list of measures that display in this window. Another option is to filter the window by properties for the measures. Use the Current List drop-down selection list to see only measures that have a Yes status for either their Planning Enabled, Planning Allowed, Data Copy Enabled, or Data Copy Allowed properties.



Measure Maintenance Window



1	<p>Toolbar -</p> <ul style="list-style-type: none"> • Save - Saves edits made to measure properties. • Exit - Close the window and return to the Measure list window. • Help - Click to open help that is specific to managing measures.
2	<p>Viewer Enabled – Use the Viewer Enabled checkboxes to adjust the enabled status for measures, which controls if measures are available to use in views. As a shortcut to selecting all, select the main Viewer Enabled checkbox in the heading above the individual checkboxes.</p> <ul style="list-style-type: none"> • Selected – means the measure will be available when adding measure items to views. For example, the measures will be available when using the Add Measure Item and Select Measures windows. • Deselected – means the measure won't be available when adding measure items to views. The measures won't show in the Add Measure Item or Select Measures windows, for example. <hr/> <p>Note: Changing a status from Yes to No in cases where a measure is used already for measure items in views does not impact existing measure items in those views. The measure will still show up in windows used to edit measure items in views and the measure items will still be included in those existing views. But, the measure won't be available to add to other views.</p>

3

Planning Allowed – Use the Planning Allowed checkboxes to adjust the status of the measures in planning views. As a shortcut to selecting all, select the main Planning Allowed checkbox in the heading above the individual checkboxes.

- **Selected** – means the measure can be edited in planning views by users with roles that give users planning update rights to such measures.
- **Deselected** – means planning features will not be active for the measure in planning views. A lock icon displays in planning views next to measures that have a Planning Enabled status of Yes and Planning Allowed status of No.

Planning Allowed checkboxes will be greyed out and unavailable if a measure isn't Planning Enabled. A Planning Enabled measure is one that belongs to a Category (measure group) that has been Update Enabled in Stratum.Connector for Viewer.

4

Data Copy Enabled and Data Copy Allowed – Use the Data Copy Enabled checkbox to define which measures can be used as Target measures in Data Copies and use the Data Copy Allowed checkbox to define which measures can have data copies processed for them. Data can be copied into measures that are designated as "Data Copy Enabled". Data Copies can be processed for measures that are designated as "Data Copy Allowed". As a shortcut to selecting all checkboxes, select the main Enabled or Allowed checkbox in the heading above the individual checkboxes.

- **Data Copy Enabled** – **Selecting** this property means the measure can be updated by Data Copy and that you can define Data Copy Authority for users. **Deselected** means the measure is not enabled and can't have its Data Copy Allowed status activated. Data Copy Allowed checkboxes will be greyed out and unavailable when the corresponding Data Copy Allowed checkboxes are deselected. Users also must be given Data Copy Authority to the measures (via their user profiles) to use the measures in data copies.
- **Data Copy Allowed** – **Selected** means the measure is currently available for Data Copy updates. **Deselected** means that the measure cannot be updated by Data Copy – that you cannot process a Data copy if it has this measure as its Target.

Properties Window for Views

Properties - Rolling 24 Week View [X]

1 Name: Rolling 24 Week View

Description: Product Sales Analysis

Type: Global 2

Owner: Mary Leonard ...

Planning: No

Export Type: Excel Report 3

View Details: Include In Exports

4 View Group: My Reports
Planning Views
Sales Team Analysis
Specialty Views

View Id: 17

Last Used: 09/23/2019 14:46:10

Last Used By: Karen Shype

Last Updated: 09/23/2019 14:46:28 5

Last Updated By: Karen Shype

Created: 03/11/2010 14:32:02

Server: [blurred]

Database: [blurred]

Cube: [blurred]

1	Name and Description - Specify the name for the view, and optionally specify a description.
2	<p>Type - Choose from Global, Shared, or Personal to control the view type. The Global option is only available for view or security administrators.</p> <p>Owner – This property is available to view and security administrators. They can use it to select a different owner for the view.</p>
3	<p>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 user.</p> <p>Export Type – This property determines the format of Excel exports for the active view. The Excel Report format will export all data and charts in the view, using the formatting that you normally see in the view. The Excel Data option will export the view data only without any special formatting applied to it.</p> <p>View Details – This property determines if the View Details tab or section will appear in exported and emailed views. View Details show as a tab in exported files and a section in emailed views. Details are included by default and show things like counts for rows and columns, filtering details, and the view name. Choose the Exclude From Exports option if you don't want the view details included in the exported and emailed outputs for this view.</p>

4	<p>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.</p>
5	<p>View Id – Displays the unique Id associated with the view.</p> <p>Last Used and Other View Properties - These are read-only fields that display information about the view including when it was last used and updated, who last used or last updated it, and when it was created.</p> <p>Server, Database, and Cube - These are read only fields that display information about the cube associated with the view.</p>

Role Maintenance Window

General Section and Attributes Tab

Role Maintenance

General

Name: Sales Reps Role



Server: [Dropdown]







Database: [Dropdown]

Attributes | Measures | User Profiles

Select Attributes to Allow Access

Dimensions	Attributes	Access
ABC Classification Code	ABC Classification Code Value	All
Account Group	Account Group Value	Partial - Member List
Activity Account	Activity Account Value	All
Buyer	Buyer Value	All
Commitment Identifier	Commitment Identifier Value	All
Commitment Type	Commitment Type Value	All
Commodity Code	Commodity Code Value	Partial - User List
Company	Company Value	All
Cost Object Activity	Cost Object Activity Value	All

1	<p>Toolbar -</p> <ul style="list-style-type: none"> Save  and Save As  - Click the respective buttons to save the active role or create a new role from the active role. If you click Save As, a Save As window opens to assign the new role a name. Clicking Save in the Save As window creates a new role with the same Attribute and Measure definitions as the original role. You will need to select user profile groups or user profiles for the new role because by default the new role will not have users associated with it.
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	<ul style="list-style-type: none"> • Delete  - Click to delete the role. You will be prompted to confirm the deletion. If the role is attached to a user profile or user profile group, and you proceed with the deletion, then users of that user profile or group will no longer be able to log into the application. You will need to assign them to another role if you want them to remain active users of the application. • Exit  - Click to exit this window and return to the Role window. • Help  - Click to open help that is specific to working with roles.
<p style="text-align: center;">2</p>	<p>General - Use this section to set up or change basic role properties.</p> <ul style="list-style-type: none"> • Name - Assign the role a name or change the name. • Server and Database - Dimensions and measures from the selected database will populate the Attributes and Measures tabs. The Server and Database drop-down lists will default to the server and database registered in Stratum.Viewer.
<p style="text-align: center;">3</p>	<p>Attributes Tab - Use this tab to control which dimension members that users with this role will be able to access. If you want users to have access to all members for all dimensions, leave all Access drop-down lists set to All.</p> <ul style="list-style-type: none"> • Dimensions and Key Attribute Values - All* dimension key attribute values display alphabetically sorted by dimension key attribute value. The Access setting for each dimension determines which members users can access from levels that belong to a dimension and its hierarchy. <hr/> <p>*Note: The Time dimension is not included.</p> <ul style="list-style-type: none"> • Access - Use the drop-down list next to a dimension for any dimensions to which you want to limit member access. Any dimension left set to All will be one to which role users will have full access to members. <ul style="list-style-type: none"> • Partial Member List - Use to give access to certain members only, as determined by a member list that you set up. The Select or Advanced Select Members window displays. Search for and select members then click OK. • Partial User List - Use to give access to certain members only, as determined by a security user list that was set up prior to working with the role. The Select User List Filter window displays. 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. • None - Use to prevent access to all members of this dimension. <p>If while working with a role, you need to edit member list or user list selections, click the browse button . The button is enabled once you make an initial member list or user list selection.</p>

Measures Tab

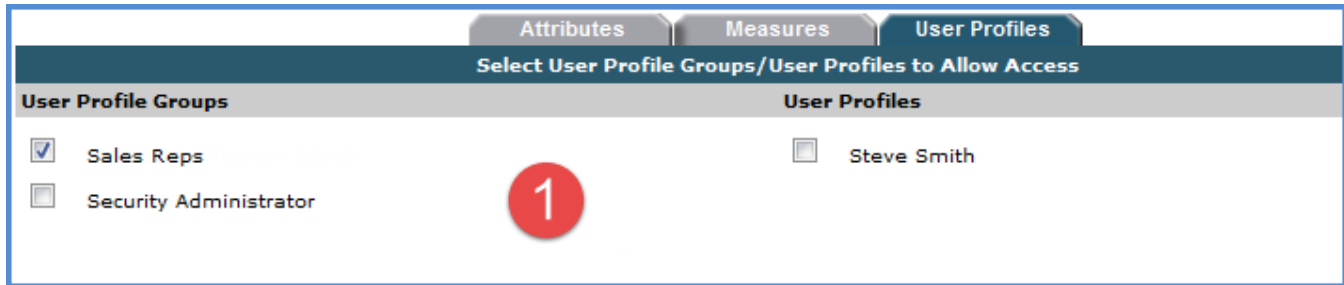
<p>1</p>	<p>Measures - Use the Measures tab to determine the measures to which users with this role will have read and update authority. For measures you don't want users of the role to access, de-select the Read checkboxes next to the measure. The corresponding Update checkboxes will be de-selected automatically.</p> <ul style="list-style-type: none"> • Expand / Collapse Controls - Use the arrows next to the Measures heading to expand or collapse the list of all Categories. Use the same arrows next to a Category to expand or collapse a list of all its measures. • Select / Deselect All Toggles - All measures for all Categories can be selected or de-selected at once using the Read and Update toggle checkboxes next to the Measures heading. All measures within a single Category can be selected or de-selected at once using the Read and Update toggle checkboxes next to the Category name (Actual Sales, Budget, Daily Sales, Forecast etc.).
<p>2</p>	<p>Read – Select the Read checkbox for measures that users of this role will need to see in views.</p> <ul style="list-style-type: none"> • You can give Read access to all measures for all Categories using the Read checkbox near the Measures heading. • You can give Read access to all measures within a single Category using the Read checkbox next to the Category name (Actual Sales, Budget, Daily Sales, Forecast etc.).
<p>3</p>	<p>Update – Select the Update checkbox for measures that users of this role will need to perform planning updates on in views. See the Planning section of online help for additional Planning setup steps.</p> <ul style="list-style-type: none"> • You can give Update authority to all measures for all Update Enabled* measures using the Update checkbox near the Measures heading.

- You can give Update authority to all measures within a single Update Enabled* Category using the Update checkbox next to the Category name.

Update authority can only be given to measures that are Read access enabled. When an Update checkbox is selected, the application automatically selects the corresponding Read checkbox. Update checkboxes will be disabled if any dimensions related to the measures have their attributes access set to None on the Attributes tab.

***Note:** Update checkboxes only display for a Category and its measures if the Updated Enabled setting has been selected for the Category (measure group) in Stratum.Connector for Viewer.

User Profiles Tab



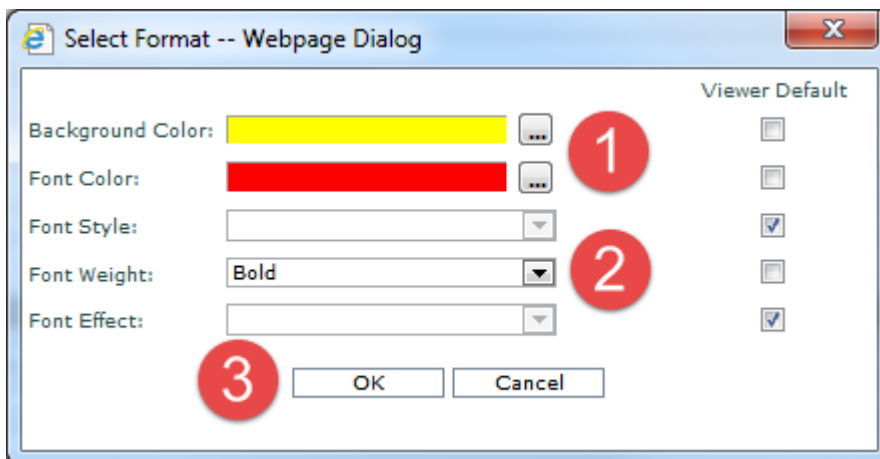
1






User Profile Groups and User Profiles - Use this tab to attach the role to a user profile or user profile group or to change the user profile or group.

- If you attach a user profile group to the role, all user profiles in the group will have that same role.
- Only those user profile groups that do not have a role assigned are available for selection. Also, only the user profiles that do not have a role assigned are available to be selected.
- If no user profiles or user profile groups are available for selection, you can save a role without a user profile or group. You can attach a user profile or group at a later time via the Role Maintenance, User Profile, or User Profile Group window. You will be warned that the role definition will not be complete until a user profile or group is selected. You can save the role in that state, but it will not be actively used in Stratum.Viewer.

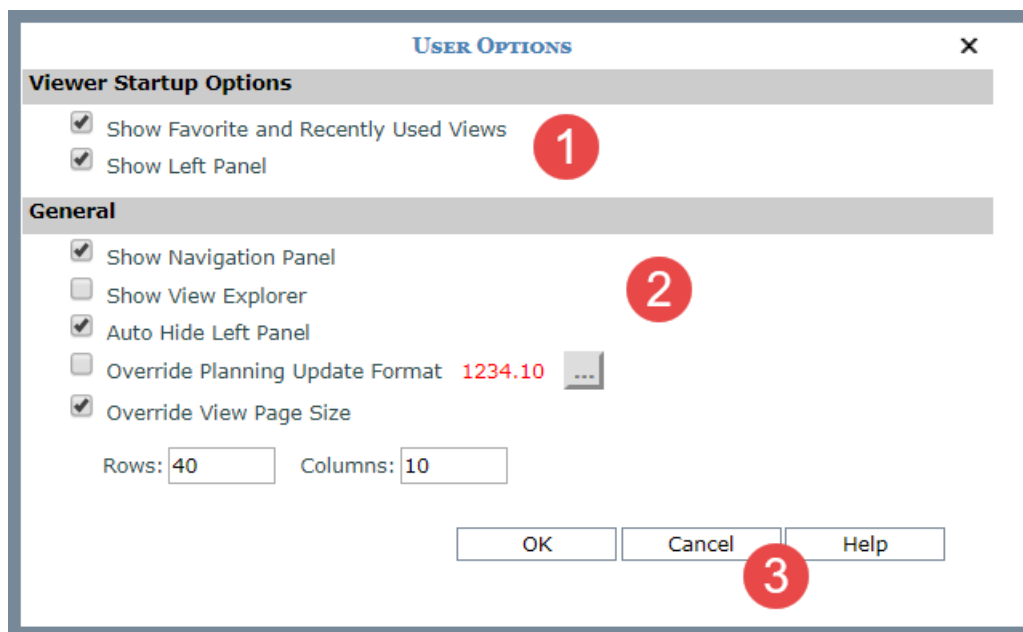
See also [Relationship between User Profiles, User Profile Groups, and Roles](#).



Select Format Window for Planning



<p>1</p>	<p>The color and font settings described in this table control how cells and the values in them will display when planning updates are made in views for this user. Administrators can edit overall settings for the application when they access the Select Format window from the Application window. Users can override those settings and customize the format for their views by accessing the Select Format window from their User Options window.</p> <p>Background Color – Defines the background color for grid cells that are impacted by planning updates made in views. If Viewer Default is selected, then Viewer background colors will be used. If Viewer Default is not selected, then use the Browse button  to choose the background color for the planning cells. The text box to the left will display the selected color.</p> <p>Font Color – Defines the font color for planning updates in views. If Viewer Default is selected, then Viewer font colors will be used. If Viewer Default is not selected, then use the Browse button  to choose the font color. The text box to the left will display the selected color.</p>
<p>2</p>	<p>Font Style – Defines the font style for planning updates made in views. If Viewer Default is selected, then Viewer font styles will be used. If Viewer Default is not selected, then use the drop down list button  to choose a font style for the rule. Valid options are: Normal, Italic, Oblique.</p> <p>Font Weight – Defines the font weight for planning updates made in views. If Viewer Default is selected, then Viewer font weights will be used. If Viewer Default is not selected, then use the drop down list button  to choose a font weight. Valid options are: Normal or Bold.</p> <p>Font Effect – Defines the font effect for planning updates made in views. If Viewer Default is selected, then Viewer font effects will be used. If Viewer Default is not selected, then use the drop down list button  to choose a font effect. Valid options are: None, Underline, Overline, Strikethrough.</p>
<p>3</p>	<p>OK – Click to save any edits made on this window and close the window. If you accessed the Select Format window from the Application window, your edits will be reflected in the sample text on that window. If you accessed the Select Format window while working with user options, the edits will be reflected in the sample text on the User Options window.</p> <p>Cancel – Click to close the window without making any changes.</p>

User Options Window



1	<p>Show Favorite and Recently Used Views – When selected, the window shows by default anytime you open Stratum.Viewer. If you prefer the window not show on startup, deselect the option. The window can be opened anytime from the left panel.</p> <p>Show Left Panel - When selected, the left panel shows by default anytime you open Stratum.Viewer. If you prefer the left panel be hidden on startup, deselect the option. The left panel can be redisplayed anytime using the arrow icon in the top corner of the Stratum.Viewer window.</p>
2	<p>Show Navigation Panel – When selected, the Navigation Panel displays by default above a view anytime you open a view. If you prefer the panel be hidden by default when you first run a view, deselect the option. You can open or close the panel as needed using this icon in a view's toolbar:</p>  <p>Show View Explorer – When selected, view explorer will display automatically when you run a view. Otherwise, it will not display automatically, but you can manually open it from a view toolbar.</p> <hr/> <p>Note: The Show View Explorer setting is not available to casual users.</p> <hr/> <p>Auto Hide Left Panel – When selected, the left panel will hide automatically after you run a view from it. If you prefer that the left panel remain visible, leave this option deselected.</p> <p>Override Planning Update Format – When selected, you can customize the format for planning updates that you make in your views. The Browse button  will be enabled. Click it to open the Select Format window and determine background color, font color, and other font properties for cells and values impacted by planning updates that you make in views.</p> <p>Override View Page Size – When selected, you can control how many rows and columns display per page for views that use paging. Enter a numeric value in the Rows and Columns fields.</p>
3	<p>OK – Save edits to your user options.</p> <p>Cancel – Close the window without making any changes.</p> <p>Help – Open help that is specific to working with user options.</p>

Advanced Concepts

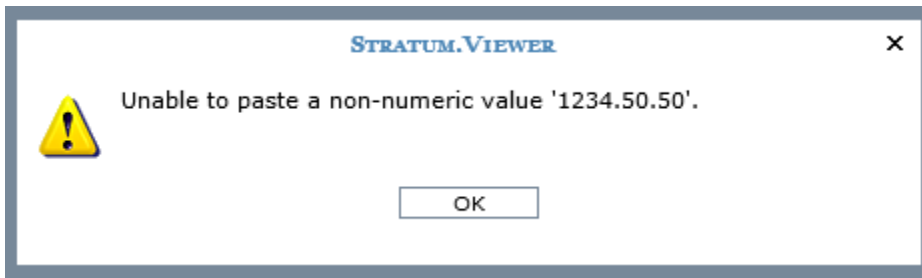
Characters and Values Considered Valid for Planning

Planning functionality in Stratum.Viewer includes a check for and removal of characters that are considered invalid. Only the valid characters from values that you enter or paste into measure item cells will display after you have entered the values or after the paste has been completed. The format given to the planning values, such as a monetary or percent symbol, will be determined by the Format String property for the measure item.

Characters that are considered valid are the numbers 0 through 9, a single period symbol, a single dash mark -, and the parentheses marks (and). The period is the only supported decimal symbol. The dash and parentheses marks are the only supported negative number formats. If you use both parentheses marks and a dash mark, such as (-1234.10), then the value will be treated as a positive number.



If your typed in or pasted values include letters or symbols such as &, %, \$, #, and so forth, the characters will be excluded by Stratum.Viewer. For example, if you copied then pasted a value of 12345TQZB, the value displayed after the paste would be 12345.

A warning message will display if none of the values for a paste are considered valid. For example, a warning message would display if you attempted to paste a value of "Abc", 1234.50.50, or - - 1234.50.




Customize Planning Formats for Your Individual Views

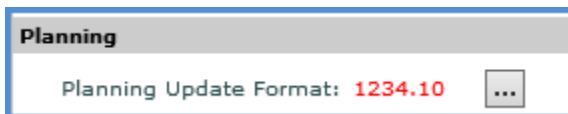
If you want to return to using application settings for planning formats, deselect the checkbox during step 2 below.

1. Choose User Options from the Settings button  in the top panel.
2. Select the Override Planning Format Update checkbox in the [User Options window](#):
 - Click the Browse button  to open the Select Format window.
 - Deselect the Viewer Default checkbox for the formatting property(ies) that you want to customize, then make changes using the applicable controls for the property. You can customize the Background Color, Font Color, Font Style, Font Weight, and Font Effect. Controls for changing are enabled only when their Viewer Default checkbox is disabled.
 - To return any property to the Viewer Default, select its Viewer Default checkbox.
3. Click OK to save the changes.

Default Values for Planning Formats

The format of updates made in your planning views is controlled either by [application settings](#) or by your own user preferences settings. You can customize the format or use the settings defined by your administrator. This topic discusses the administrative settings.

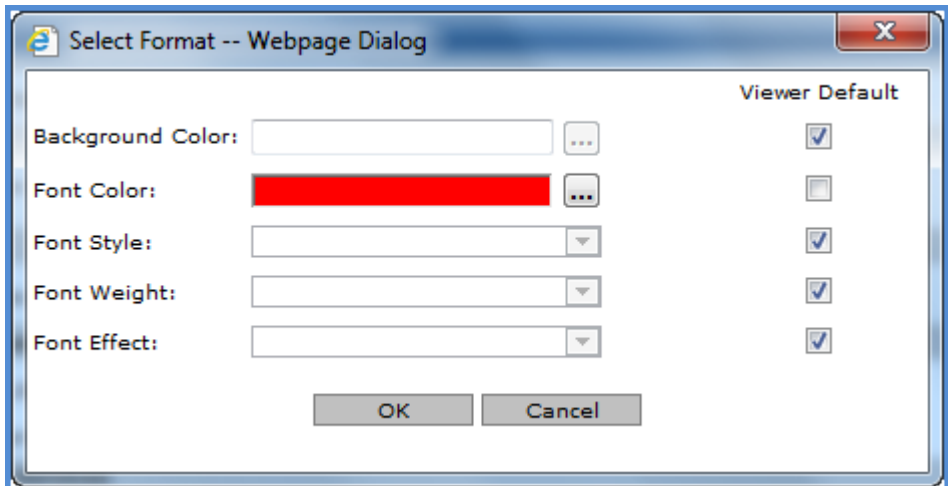
The default state of planning update properties upon first use of Stratum.Viewer is shown below. Security administrators can make adjustments to these defaults to match the preferences of your company. To do so, they click the Browse button  next to the Planning Update Format option and make changes in the Select Format window.



Next is an example of how the above default settings impact planning views.


Note: Settings will not impact views of users who choose to override administrative settings with their own customized formatting.

Here is the Select Format window in its default state. It shows that a red font will be assigned to planning updates made in views.

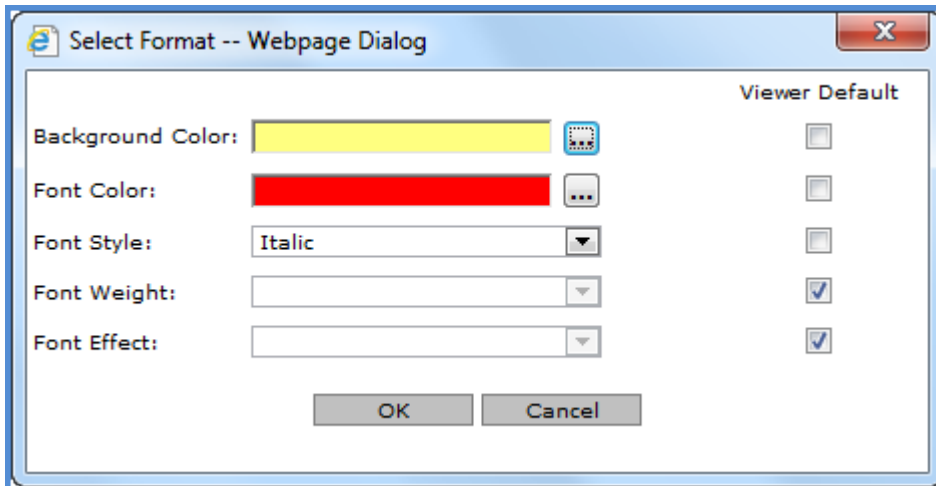


The next image shows a view after a few planning updates have been entered into a few cells. The values in red are the values that the user just updated. Values in total cells impacted by the updates also display in red.

			Year >>	2015		2016			
			Region >>	330	331	2015 Total	330	331	2016 Total
			Rgn Long Description	East	West		East	West	
Customer Class	CClass Long Description	Product	Prod Long Description	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
90	US Customer	620B914003	Applesauce 12oz BR* 0B	2,007		2,007			
		620B914004	FrtCktail HS 12 oz BR* 0B	1,302		1,302			
		620B914015	Peach Hlvs LS 12 oz BR* 0B	6,614		664			
		624C954017	Cherries, Bing 4C	27,579	7,203	34,782			
		624D954019	Meatloaf, Frozen 4D	125,269	33,157	158,426			
		624D954023	Sirloin Tips - USDA Grade A 4D	77,591	20,915	88,506			
		90 Total		240,362	61,275	285,687			
91	CAN Customer	620B914003	Applesauce 12oz BR* 0B						
		620B914004	FrtCktail HS 12 oz BR* 0B						
		620B914015	Peach Hlvs LS 12 oz BR* 0B						
		624C954017	Cherries, Bing 4C	692	2,878	3,570			
		624D954019	Meatloaf, Frozen 4D	9,546	6,843	16,390			
		624D954023	Sirloin Tips - USDA Grade A 4D	5,253	3,230	8,484			
		91 Total		15,492	12,951	28,443			
Grand Total				255,854	74,226	314,130			

The values in the above view will remain red until the user clicks the Process Your Planning Changes icon  in the grid toolbar. After the icon is clicked and the grid refreshes, formatting will revert back to the standard formatting used for all other values in the grid.


Next, the administrator makes changes in the Select Format window. Here is the window after a yellow background color and italic font style have been selected.



When the next round of planning updates is made to the same view after this administrative change, the changes will display as shown in the next image to match the settings just changed by the administrator.

				2015		2016			
			Year >>	330	331	2015 Total	330	331	2016 Total
			Region >>	East	West		East	West	
			Rgn Long Description						
			Prod Long Description	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working	Plan Units Working
Customer Class	C Clas Long Description	Product							
90	US Customer	620B914003	Applesauce 12oz BR* 0B	2,007		2,007			
		620B914004	FrtCktail HS 12 oz BR* 0B	1,302		1,302			
		620B914015	Peach Hlvs LS 12 oz BR* 0B	6,614		664			
		624C954017	Cherries, Bing 4C	27,579	7,203	34,782			
		624D954019	Meatloaf, Frozen 4D	125,269	33,157	158,426			
		624D954023	Sirloin Tips - USDA Grade A 4D	77,591	20,915	88,506			
		90 Total		240,362	61,275	285,687			
91	CAN Customer	620B914003	Applesauce 12oz BR* 0B						
		620B914004	FrtCktail HS 12 oz BR* 0B						
		620B914015	Peach Hlvs LS 12 oz BR* 0B						
		624C954017	Cherries, Bing 4C	692	2,878	3,570			
		624D954019	Meatloaf, Frozen 4D	9,546	6,843	16,390			
		624D954023	Sirloin Tips - USDA Grade A 4D	5,253	3,230	8,484			
		91 Total		15,492	12,951	28,443			
Grand Total				255,854	74,226	314,130			

Edit Application Defaults for Planning Formats

1. Click Application in the Admin Utilities view group.
2. Scroll to the Planning section of the [Application window](#).
3. Click the Browse button  next to the Planning Update Format property.

4. Use the [Select Format window](#) to edit the format.

- Deselect the Viewer Default checkbox for the formatting property(ies) that you want to customize, then make changes using the applicable controls for the property. You can customize the Background Color, Font Color, Font Style, Font Weight, and Font Effect. Controls for changing are enabled only when their Viewer Default checkbox is disabled.

Notes: Upon first use of the Select Format window, the Viewer Default checkbox for Font Color will be deselected and the color selection will be red by default. If needed, administrators can define different planning update formats for particular users through User Profile settings.

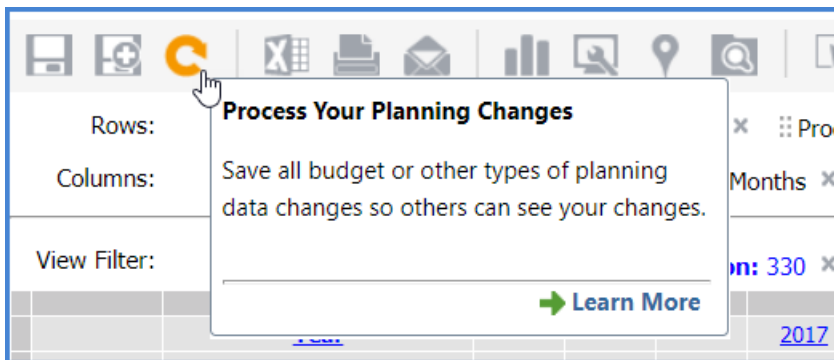
- To return any property to the Viewer Default, select its Viewer Default checkbox.

5. Click OK in the Select Format window.

6. Save  the changes.

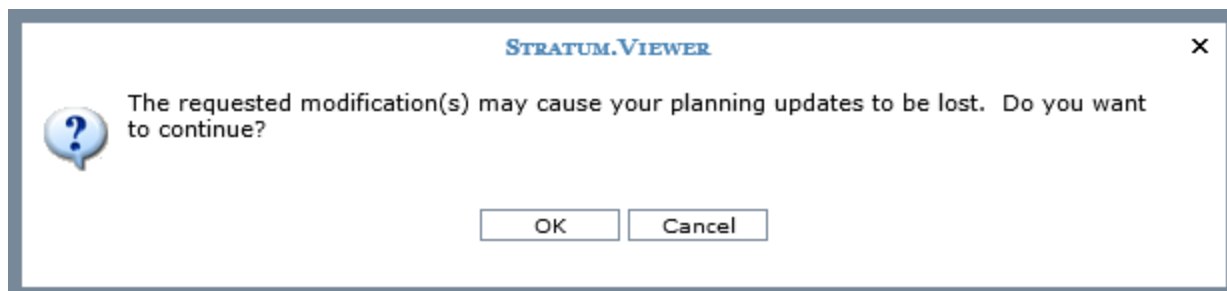
Impact of View and Browser Modifications on Pending Planning Updates

Some modifications that are made to views or the browser window can impact pending planning updates that have not yet been processed. Depending on the type of modification, a warning message will display to warn you that changes will be lost. To avoid losing the changes, you can click the Process Your Planning Changes icon in the grid toolbar.



View Modifications that Refresh the Grid

Modifications such as drilling up or down in a view, changing a sort, changing a filter, adding or deleting measure items or levels or attribute relationships, and drag and drop are changes that will refresh the grid. If you make such changes while there are unprocessed planning updates in the view, a warning message will display prior to the grid refresh. The message will tell you that updates will be lost and give you the opportunity to cancel your modifications.

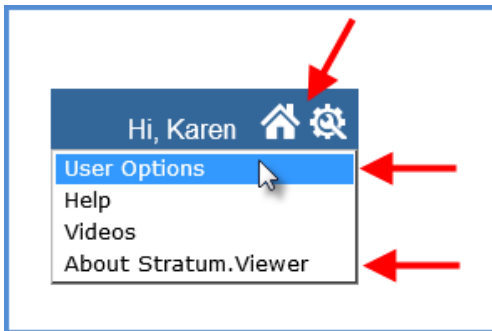


Some view modifications such as changing the view name or performing a Save do not require the grid to be refreshed. If the modification will not refresh the grid, you will not lose unprocessed planning updates and therefore a warning message will not display about the modification.

Modifications from Outside the View Window

Modifications initiated outside the view's grid interface that either replace or refresh the view window also will cause pending planning updates to be lost. Because the changes are made from outside the grid and view interface, you will not receive a warning message about the loss of your planning updates. The modification will be applied immediately. Examples of modifications that will replace or refresh the view window:

- Navigating to another website from your current browser tab.
- Closing the current browser tab.
- Running a new view or opening an administrative page from the Stratum.Viewer left panel.
- Using the Home button, choosing User Options or About Stratum.Viewer from the Settings menu, or signing off.



Planning Requirements Checklist

Conditions that must be met for a user to perform planning updates in a view are described in the following lists.

User and Measure Requirements

When setting up Planning features for users, administrators must decide what data (measures) their users will be allowed to adjust. Based on those user needs, administrators then do the following:

- ✓ In Stratum.Connector for Viewer, make the applicable Measure Groups for those measures Update Enabled.
- ✓ In Stratum.Viewer's Measure Maintenance, select the Planning Allowed property for the applicable measures that users will be updating.
- ✓ In Stratum.Viewer's Role Maintenance, make sure that applicable measures in roles of users with a casual, advanced, or view administrator access have their Update checkboxes selected.*

***Notes:** Security administrators can plan on any measure item as long as its Category has an Update Enabled status in Stratum.Connector for Viewer and the underlying measure has its Planning Allowed property selected in Measure Maintenance.

View Setup Requirements

View setup criteria related to planning are listed below. These requirements are applicable no matter what type of data users will be updating in the view – existing values, zero values, or blank values.

- ✓ View's Planning property = Yes
- ✓ Time Range property = No for measure items axis
- ✓ Drilldown View property = None for measure items axis
- ✓ Properties for regular measure items being planned on:
 - Type = Regular
 - Value = Yes
 - Image, Conditional Format, Pop-up Expression, and Hyperlink properties all = No

- Visible = Yes

Additional View Considerations – Zero or Blank Values

The following view setup requirements are specific to planning on zero or blank values. If you are only doing Planning on existing values, you can disregard this information.

- ✓ All dimensions associated with the measures' Category must be visible in the view. If they are not, you will not be able to make changes to cells that have zero or blank.
- ✓ If time hierarchies are used in the grid, they can be used on one axis only or in the view filter (Cannot be used on both rows and columns. Cannot be used in both the view filter and on an axis).

Additional View Considerations – Subtotal or Total Cells

The following view setup requirements are specific to planning on values in subtotal or total cells. If you are only doing Planning on detail cells, you can disregard this information.

- ✓ Planning is not permitted on subtotal or total cells with zero or blank values.
- ✓ Planning is permitted on subtotal and total cells with existing values as long as these conditions are met:
 - The values are on the axis opposite from measure items (values on the same axis as measure items cannot be updated).
 - Others Summary property = No for measure items axis.
 - All members for the axis opposite from measure items must be visible in the grid. You can make all members visible by disabling the Use Paging setting in a view's Display Options or clicking Show All in the view toolbar. Views that fit on a single page whether or not paging is in use also meet this condition.

Specialized View Considerations

If your view utilizes View Filter functionality, also keep in mind that the level in it must be filtered by a single member only rather than a user list or expression.

If your view utilizes a hierarchy that was created from an attribute relationship, also keep in mind that all hierarchies from that same dimension must exist on the same axis or in the View Filter (filtered by a single member).

Treatment of Decimal Changes in Planning Changes

The Format String property for a measure item determines the number of decimal positions that will display in the grid for its values. That format will be applied to values entered or pasted into a planning enabled cell. If a user enters changes with more or less decimal places than those in the format string, values will be rounded to match the format string once the user is done making changes and has pressed the Enter key or clicked anywhere else in the view (or when the Paste has been completed).

In this example, a user entered 100.5 for the plan dollars measure item and the Pear Hlvs product. The format string for the measure item contains zero decimal places.

Prod Long Description	Plan Dollars by Region Product Cust Class Working
Pear Hlvs LS 12 oz BR* 0A	100.5
FrtCktail LS 12 oz BR* 0A	\$1,144,195
Peach Slcs LS 16 oz BR* 0A	\$1,100,913
Apple Filling 12oz BR* 0A	\$1,100,913
Peach Hlvs HS 12 oz BR* 0A	\$1,029,776

When the user accepts the change, the value is rounded to 101 based on the measure item format string.

Prod Long Description	Plan Dollars by Region Product Cust Class Working
Pear Hlvs LS 12 oz BR* 0A	\$101
FrtCktail LS 12 oz BR* 0A	\$1,144,195
Peach Slcs LS 16 oz BR* 0A	\$1,100,913
Apple Filling 12oz BR* 0A	\$1,100,913
Peach Hlvs HS 12 oz BR* 0A	\$1,029,776
	\$4,375,898

Treatment of Planning Updates Made in Views

Examples in this topic show how planning updates on detail and subtotal cells are carried through to other parts of a view.

Example 1 – Detail Cell Updates

When a detail cell is changed for a planning enabled measure item, the associated subtotal and total cells are recalculated on the axis opposite the measure item's axis. The cells are recalculated when the user exits the detail cell or successfully pastes a value into the cell.

In this view, a zero value is being changed to \$10,000.

View Name: Planning Updates - Plan Dollars Working								
View Filter								
		Year >>		2015		2016		Grand Total
		Region >>		2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A		\$6,454.00	\$6,454.00				\$6,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$65,348.00	\$92,146.00	\$157,494.00				\$157,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,644.00	\$5,644.00				\$5,644.00
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$678,923.00	\$679,423.00				\$679,423.00
	Pear Hlvs LS 12 oz BR* 0A		\$3,454.00	\$3,454.00				\$3,454.00
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$688,021.00	\$689,088.00				\$689,088.00
Grand Total		\$66,415.00	\$780,167.00	\$846,582.00				\$846,582.00

Here is the view with the subtotal and total cells recalculated after the user exits the changed cell. The total cells on the opposite axis from measure items are recalculated immediately.

		2015			2016			Grand Total
	Year >>	2015			2016			
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$6,454.00				\$6,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$157,494.00				\$157,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,644.00	\$5,644.00				\$5,644.00
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$678,923.00	\$679,423.00				\$679,423.00
	Pear Hlvs LS 12 oz BR* 0A		\$3,454.00	\$3,454.00				\$3,454.00
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$688,021.00	\$689,088.00				\$689,088.00
Grand Total		\$76,415.00	\$780,167.00	\$846,582.00				\$846,582.00

Here is the view after the view's Process Your Planning Changes icon was clicked to process the planning changes. All detail, subtotal and totals cells reflect the change after that process.

		2015			2016			Grand Total
	Year >>	2015			2016			Grand Total
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,644.00	\$5,644.00				\$5,644.00
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$678,923.00	\$679,423.00				\$679,423.00
	Pear Hlvs LS 12 oz BR* 0A		\$3,454.00	\$3,454.00				\$3,454.00
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$688,021.00	\$689,088.00				\$689,088.00
Grand Total		\$76,415.00	\$780,167.00	\$856,582.00				\$856,582.00

Example 2 – Total Cell Updates

When changes are made to subtotal or total cells, the associated detail cells are recalculated using a weighted average calculation. In this view, a subtotal will be changed from \$688,021.00 to \$700,000.00.

		2015			2016			Grand Total
	Year >>	2015			2016			
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,644.00	\$5,644.00				\$5,644.00
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$678,923.00	\$679,423.00				\$679,423.00
	Pear Hlvs LS 12 oz BR* 0A		\$3,454.00	\$3,454.00				\$3,454.00
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$688,021.00	\$689,088.00				\$689,088.00
Grand Total		\$76,415.00	\$780,167.00	\$856,582.00				\$856,582.00

Here is the view with the detail cells recalculated after the user exits the changed subtotal cell. The total cell on the opposite axis from measure items also is recalculated.

		2015			2016			Grand Total
	Year >>	2015			2016			Grand Total
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,742.27	\$5,644.00				\$5,644.00
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$690,743.60	\$679,423.00				\$679,423.00
	Pear Hlvs LS 12 oz BR* 0A		\$3,514.14	\$3,454.00				\$3,454.00
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$700,000.01	\$689,088.00				\$689,088.00
Grand Total		\$76,415.00	\$792,146.01	\$856,582.00				\$856,582.00

Here is the view after the view's Process icon was clicked to process the planning changes. All detail, subtotal and totals cells reflect the change after that process.

		2015			2016			Grand Total
Year >>		East			West			2015 Total
Region >>		East			West			2016 Total
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,742.27	\$5,742.27				\$5,742.27
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$690,743.60	\$691,243.60				\$691,243.60
	Pear Hlvs LS 12 oz BR* 0A		\$3,514.14	\$3,514.14				\$3,514.14
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$700,000.01	\$701,067.01				\$701,067.01
Grand Total		\$76,415.00	\$792,146.01	\$868,561.01				\$868,561.01

Example 3 – Pasted Updates

Updates made to views by pasting are treated the same as those made by typing changes directly into cells. See Examples 1 and 2. One case to take note of is a paste that involves multiple values and a paste area consisting of detail and subtotal cells. In that case, only the values for the detail cells are applied during the paste. Values pasted into the subtotal or total cells are ignored during the paste in this case.

Here is a set of four values copied from a spreadsheet.

Copied Values
10,000
10,000
5,000
2,500

Next, a paste area of four cells has been selected. Take note that one of the cells in the selected area is a subtotal cell.

	Year >>	2015			2016			Grand Total
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00		\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00		\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I							
	US Customer Total	\$75,348.00	\$92,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL*							
	FrtCktail HS 12 oz BR		\$5,742.27	\$5,742.27				\$5,742.27
	Peach Hlvs LS 12 oz			\$567.00				\$567.00
	Peach Hlvs LS 12oz F		\$90,743.60	\$691,243.60				\$691,243.60
	Pear Hlvs LS 12 oz B		\$3,514.14	\$3,514.14				\$3,514.14
	Pear Slcs LS 12 oz B							
	CAN Customer Total		\$700,000.01	\$701,067.01				\$701,067.01
Grand Total			\$792,146.01	\$868,561.01				\$868,561.01

- Copy
- Paste
- Select All
- Insert
- Edit
- Actions
- Transpose
- View Explorer

The values pasted are the first three only because the fourth cell selected in the paste area is a subtotal cell. Those values are the 10,000; 10,000; and 5,000. The fourth number (2,500) from the copied values is ignored. The subtotal on the opposite axis from measure items is recalculated using the pasted values and existing values for the US Customer products.

	Year >>	2015			2016			Grand Total
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00	\$10,000.00	\$9,805.00				\$9,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00	\$10,000.00	\$50,543.00				\$50,543.00
	Pear Slcs LS 12 oz BR* 5I		\$5,000.00					
	US Customer Total	\$75,348.00	\$117,146.00	\$167,494.00				\$167,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,742.27	\$5,742.27				\$5,742.27
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$690,743.60	\$691,243.60				\$691,243.60
	Pear Hlvs LS 12 oz BR* 0A		\$3,514.14	\$3,514.14				\$3,514.14
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$700,000.01	\$701,067.01				\$701,067.01
Grand Total		\$76,415.00	\$817,146.01	\$868,561.01				\$868,561.01

Here is the view after the view's Process icon was clicked to process the planning changes. All detail, subtotal and totals cells reflect the change after that process.

		2015			2016			Grand Total
	Year >>							
	Region >>	East	West	2015 Total	East	West	2016 Total	
Customer Class	Product	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working	Plan Dollar Working
US Customer	Applesauce 12oz PL* 0A		\$78,906.00	\$78,906.00				\$78,906.00
	FrtCktail HS 12 oz BR* 0A	\$5,000.00	\$6,786.00	\$11,786.00				\$11,786.00
	Peach Hlvs LS 12 oz BR* 0A	\$10,000.00	\$6,454.00	\$16,454.00				\$16,454.00
	Peach Hlvs LS 12oz PL* 0A	\$9,805.00	\$10,000.00	\$19,805.00				\$19,805.00
	Pear Hlvs LS 12 oz BR* 0A	\$50,543.00	\$10,000.00	\$60,543.00				\$60,543.00
	Pear Slcs LS 12 oz BR* 5I		\$5,000.00	\$5,000.00				\$5,000.00
	US Customer Total	\$75,348.00	\$117,146.00	\$192,494.00				\$192,494.00
CAN Customer	Applesauce 12oz PL* 0A							
	FrtCktail HS 12 oz BR* 0A		\$5,742.27	\$5,742.27				\$5,742.27
	Peach Hlvs LS 12 oz BR* 0A	\$567.00		\$567.00				\$567.00
	Peach Hlvs LS 12oz PL* 0A	\$500.00	\$690,743.60	\$691,243.60				\$691,243.60
	Pear Hlvs LS 12 oz BR* 0A		\$3,514.14	\$3,514.14				\$3,514.14
	Pear Slcs LS 12 oz BR* 5I							
	CAN Customer Total	\$1,067.00	\$700,000.01	\$701,067.01				\$701,067.01
Grand Total		\$76,415.00	\$817,146.01	\$893,561.01				\$893,561.01

Example 4 – Treatment of Calculations

Calculated measure items and regular measure items that are based on Stratum.Planner calculated values are not recalculated when Planning updates are made in a view. They will be updated to reflect planning updates after you execute the Update Plan Process.

The following view contains two such calculations. The first is Actual vs Budget Units, which is a calculated measure item that references the Budget Units Working measure item in its expression. The second measure item that refers to Budget Units Working is the Budget ASP Working measure item. It is based on a Stratum.Planner calculated value measure.

	RepBroker >>	300					
	RepBr Long Description	Nicole Toscano					
	Product Brand >>	001				002	
	PBrnd Long Description	Tip Top				Dew Drop	
Year	Months	Actual Sales Units	Budget Units Working	Actual vs Budget Units	Budget ASP Working	Actual Sales Units	Budget Units Working
2014	January	25,485	26,267	-782	\$73.09	26,774	27,5
	February	14,031	10,699	3,332	\$68.30	33,408	31,7
	March	18,995	19,578	-583	\$74.88	25,151	20,7
	April	22,051	11,707	10,344	\$71.45	33,076	34,4
	May	23,654	19,701	3,953	\$72.29	28,784	20,5
	June	27,116	25,357	1,759	\$72.22	48,089	44,9
	July	20,434	21,152	-718	\$77.18	38,974	30,3
	August	48,782	29,834	18,948	\$77.13	23,737	27,0
	September	27,412	23,685	3,727	\$81.00	55,361	25,3
	October		14,576	-14,576	\$77.60		21,3
	November		14,972	-14,972	\$76.27		20,2
	December		11,721	-11,721	\$80.23		17,7
	2014 Total	227,960	229,248	-1,288	\$75.35	313,354	322,1
2015	January		30,141	-30,141	\$79.62		31,6
	February		1,322	-1,322	\$690.87		3,9
	March		24,121	-24,121	\$75.97		25,5
	April		14,854	-14,854	\$70.40		43,7

The September 2014 value for Budget Units Working is decreased by 10,000 units. As soon as the change is made, the total on the opposite axis from the measure item is recalculated.

▼ RepBroker >> RepBr Long Description		300						
▼ Product Brand >> PBrnd Long Description		001			002			
		Tip Top			Dew Drop			
▼ Year	Months	Actual Sales Units	↻ Budget Units Working	Actual vs Budget Units	Budget ASP Working	Actual Sales Units	↻ Budget Units Working	
2014	January	25,485	26,267	-782	\$73.09	26,774	27,5	
	February	14,031	10,699	3,332	\$68.30	33,408	31,7	
	March	18,995	19,578	-583	\$74.88	25,151	20,7	
	April	22,051	11,707	10,344	\$71.45	33,076	34,4	
	May	23,654	19,701	3,953	\$72.29	28,784	20,5	
	June	27,116	25,357	1,759	\$72.22	48,089	44,9	
	July	20,434	21,152	-718	\$77.18	38,974	30,3	
	August	48,782	29,834	18,948	\$77.13	23,737	27,0	
	September	27,410	13,685	3,727	\$81.00	55,361	25,3	
	October			14,576	-14,576	\$77.60		21,3
	November			14,972	-14,972	\$76.27		20,2
	December			11,721	-11,721	\$80.23		17,7
	2014 Total	227,960	219,249	-1,288	\$75.35	313,354	322,1	
2015	January		30,141	-30,141	\$79.62		31,6	
	February		1,322	-1,322	\$690.87		3,9	
	March		24,121	-24,121	\$75.97		25,5	
	April		14,854	-14,854	\$70.40		43,7	

Here is the view after the view's Process icon was clicked to process the planning changes. The two calculations reflect the planning update.

▼ RepBroker >> 300							
▼ RepBr Long Description		Nicole Toscano					
▼ Product Brand >> 001						002	
▼ PBrnd Long Description		Tip Top			Dew Drop		
▼ Year	Months	Actual Sales Units	↻ Budget Units Working	Actual vs Budget Units	Budget ASP Working	Actual Sales Units	↻ Budget Units Working
2014	January	25,485	26,267	-782	\$73.09	26,774	27,5
	February	14,031	10,699	3,332	\$68.30	33,408	31,7
	March	18,995	19,578	-583	\$74.88	25,151	20,7
	April	22,051	11,707	10,344	\$71.45	33,076	34,4
	May	23,654	19,701	3,953	\$72.29	28,784	20,5
	June	27,116	25,357	1,759	\$72.22	48,089	44,9
	July	20,434	21,152	-718	\$77.18	38,974	30,3
	August	48,782	29,834	18,948	\$77.13	23,737	27,0
	September	27,412	13,685	13,727	\$140.20	55,361	25,3
	October		14,576	-14,576	\$77.60		21,3
	November		14,972	-14,972	\$76.27		20,2
	December		11,721	-11,721	\$80.23		17,7
	2014 Total	227,960	219,248	8,712	\$78.79	313,354	322,1
2015	January		30,141	-30,141	\$79.62		31,6
	February		1,322	-1,322	\$690.87		3,9
	March		24,121	-24,121	\$75.97		25,5
	April		14,854	-14,854	\$70.40		43,7

Frequently Asked Questions (FAQ's)


Can Defaults for Planning Formats be Overridden?

Yes, by either security administrators or individual users.

Security administrators can define custom planning formats for particular users through the User Profile window. They can select the user's profile and then select the Override Planning Update Format checkbox to customize the format for a user. Or, users can customize their own planning format preferences from their [User Options window](#). They can select the Override Planning Update Format checkbox to do so.

When the Override Planning Update Format checkbox is selected, a [Select Format window](#) can be opened from the respective windows mentioned above to control how changed values will display when a user performs planning in one of their planning views.

Why Can't I see Planning Icons in Views?

You will only see planning icons  in views that meet planning requirements and only next to measure items to which your role gives you Update access.

- Icons will not display in views that do not meet planning requirements. See also [Planning Requirements Checklist](#).
- Icons will not display next to measure items that are designated as Read access only for your role.
- Icons will not display next to measure items if their underlying measure hasn't been given a Planning Allowed status in [Measure Maintenance](#).

Why Can't I Update Totals or Subtotals in Views?

Values in total and subtotal cells cannot be updated in the following cases:

- When the cells contain a blank or zero value. Numeric values are the only type that can be updated in total and subtotal cells.
- When the Others Summary property is set to Yes on the measure items axis.
- When the cells are on the same axis as measure items. Only total and subtotal values on the axis opposite the one for measure items can be changed.
- When some members on the axis opposite the measure items axis are not visible. All members of the result set should be made visible – you can make all members visible by disabling the Use Paging setting in a view's Display Options or clicking Show All in the view toolbar. Views that fit on a single page whether or not paging is in use also meet this condition.

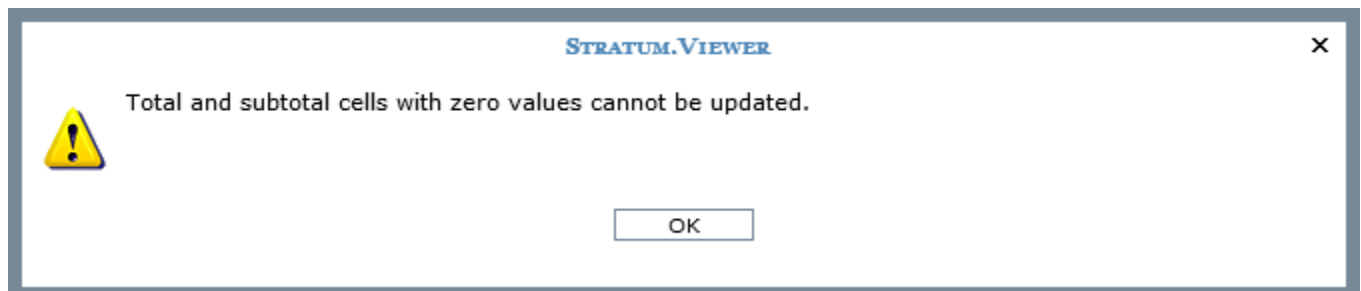
Why Can't I Update Zero Values in Views?

Several requirements must be met in order for users to update a blank or zero cell in a view.

- Verify that all hierarchies associated with the Category for the measure items' underlying measures are visible in the grid.
- Verify that any hierarchies that are not valid* for the associated Category are not visible in the grid.
- Verify that you are not trying to change subtotal or total cells. Blank and zero values cannot be updated in subtotal and total cells.
- If time hierarchies are used in the grid, verify that they exist only on one axis or only in the View Filter.

***Note:** A hierarchy must be selected for a measure group in Stratum.Connector for Viewer in order for it to be considered 'valid' for measures in that group and for measure items that are based on the measures in Stratum.Viewer. See also [Planning Requirements Checklist](#).


For example, if you attempt to change subtotal or total cells with blank or zero values, the following message displays.



In the following view, one of the hierarchies for the measure item's Category isn't visible. Attempting to change zero or blank values in the detail cells would result in the following message.

	Year >>	2012	2013	Grand Total
Customer Class	Product	Plan Dollars Working	Plan Dollars Working	Plan Dollars Working
US Customer	Peach Slcs LS 16 oz BR* 0A	\$96,845.71		\$96,845.71
	Applesauce 12oz BR* 0A	\$46,863.43		\$46,863.43
	Peach Hlvs LS 12 oz BR* 0A	\$27,024.98		\$27,024.98
	Pear Slcs LS 12 oz BR* 0A	\$41,367.88		\$41,367.88
	CAN Customer Total	\$155,636.49		\$155,636.49
Grand Total		\$450,012.49		\$450,012.49


Stratum.Viewer -- Webpage Dialog

 This view does not support planning updates for zero values. Please check the rows, columns, and View Filter to make sure the use of all dimensions and filtering meet planning requirements for such values.

A similar message displays if all hierarchies for the Category are visible but there are additional hierarchies visible that are not valid for the Category.

	Year >>	2012	2013			
	Region >>	East	West	2012 Total	East	West
Customer Class	Product Type	Product	Plan Dollars Working	Plan Dollars Working	Plan Dollars Working	Plan Dollars Working
US Customer	Manufactured	Applesauce 12oz BR* 0A				
		FrtCktail HS 12 oz BR* 0A				
		Peach Hlvs HS 12 oz BR* 0A				
		Pear Hlvs LS 12 oz BR* 0A				
		Pear Slcs LS 12 oz BR* 0A				
		Peach Hlvs LS 12 oz BR* 0A				
		Purchased Total				
	US Customer Total					
CAN Customer	Manufactured	Applesauce 12oz BR* 0A				

Stratum.Viewer -- Webpage Dialog

 This view does not support planning updates for zero values. Please check the rows, columns, and View Filter to make sure the use of all dimensions and filtering meet planning requirements for such values.

Why did Special Formatting for Planning Updates Disappear from the View?

The Planning Update formatting of cells and values is only applied to cells in the grid that contain pending planning changes. Formatting will revert back to the standard formatting once the user saves their planning updates by executing the Update Plan Process. Planning Update formatting is also removed when planning changes are cancelled due to other actions you take in the grid, such as drilling up or down in the view prior to processing your pending changes.

This view has some pending changes. The second image that follows shows the refreshed grid after the changes have been processed.

		620B914003			620B914004		
Product >>							
Prod Long Description		Applesauce 12oz BR* 0B			FrtCktail HS 12 oz BR* 0B		
<u>Year</u>	<u>Months</u>	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	169	164	\$7,134			
	February	24	23	\$999	160	322	\$14,262
	March	59	57	\$2,480	172	402	\$17,712
	April				415		
	May	234	284	\$9,979			
	June	353	147	\$4,798			
	July	27	331	\$10,378			
	August	110	153	\$4,486	204		
	September	637	773	\$28,021		248	\$9,069
	October				69		
	November	435			167		
	December	226					
Grand Total		2,274	1,933	\$68,275	1,187	972	\$41,043

View Name: Product Budget Details							
View Filter							
	Product >>	620B914003			620B914004		
	Prod Long Description	Applesauce 12oz BR* 0B			FrtCktail HS 12 oz BR* 0B		Peac
Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	169	164	\$7,134			
	February	24	23	\$999	160	322	\$14,262
	March	59	57	\$2,480	172	402	\$17,712
	April				415		
	May	234	284	\$9,979			
	June	353	147	\$4,798			
	July	27	331	\$10,378			
	August	110	153	\$4,486	204		
	September	637	773	\$28,021		248	\$9,069
	October				69		
	November	435			167		
	December	226					
Grand Total		2,273	1,933	\$68,275	1,187	972	\$41,043

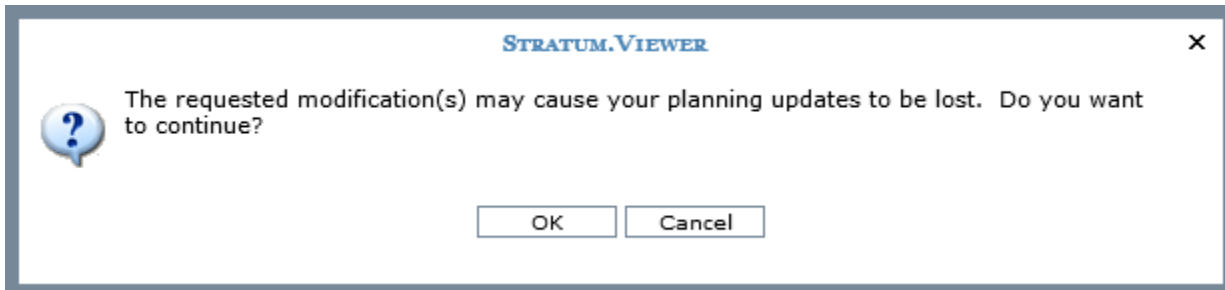
Why Does a Lock Icon Show Next to Measure Items in Planning Views?

The lock indicates that planning is currently not allowed on the measure. Administrators control whether or not planning is allowed on measures through measure administration settings.

		Year Based	Current Year					
Division	Div Long Description	Months Based	January	February	March	April	May	June
E	Foodservice Division	Revenue	\$205,004,277	\$145,158,441	\$205,018,109	\$219,626,381	\$221,006,047	\$223,855
		Cost of sales	\$22,368,782	\$16,019,726	\$22,546,003	\$24,027,639	\$24,327,805	\$24,627
		Material	\$216,504,726	\$153,301,624	\$216,519,334	\$231,947,109	\$233,404,173	\$236,413
		Labor						
		Overhead	\$3,368,027	\$2,412,061	\$3,394,711	\$3,617,798	\$3,662,994	\$3,708
		Deals	\$2,988,701	\$230,494	\$3,234,528	\$3,549,675	\$3,297,992	\$3,300
		Gross	-\$40,225,959	-\$26,805,463	-\$40,676,467	-\$43,515,840	-\$43,686,915	-\$44,193
G	Grocery Division	Revenue	\$458,582,381	\$320,569,625	\$454,851,886	\$479,643,477	\$507,099,361	\$499,658
		Cost of sales	\$56,282,394	\$39,802,975	\$56,718,399	\$60,555,181	\$63,196,698	\$61,541
		Material	\$484,308,201	\$338,553,126	\$480,368,431	\$506,550,794	\$535,546,915	\$527,688
		Labor						
		Overhead	\$8,474,338	\$5,993,062	\$8,539,987	\$9,117,684	\$9,515,412	\$9,266
		Deals	\$7,519,911	\$572,690	\$8,137,020	\$8,945,997	\$8,567,241	\$8,247
	Gross	-\$98,002,464	-\$64,352,227	-\$98,911,950	-\$105,526,180	-\$109,726,905	-\$107,084	

Why is a Message Displaying about Planning Updates being Lost?

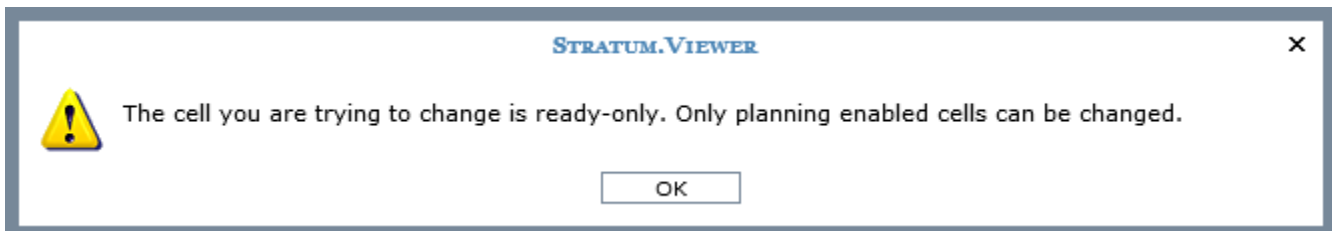
Pending planning updates may be lost if you make modifications in your view, for example, if you drill down or up in the view such that the grid refreshes. You should submit the changes for processing in order to retain them to prevent the changes from being lost. See also [Impact of View and Browser Modifications on Pending Planning Updates](#).



Why is a 'Read Only' Message Displaying?

The following message displays when any of the cells in an area selected for a paste are cells that do not accept planning updates. For example, you attempt to paste into an area that:

- Contains values of measure items that are not Update enabled for your role.
- Contains a caption, a level value, or an attribute relationship value.



Why is a 'Select an Area to Paste' Message Displaying?

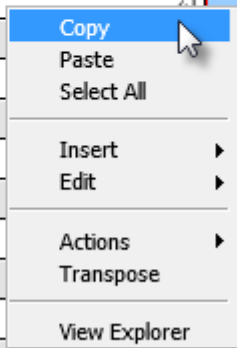
The following message will display when you right-click in the view interface and choose Paste without having first actively clicked on a specific cell in the grid. Right-click in a specific cell, and then choose Paste in order to proceed with the paste.



Why is an 'Information Cannot be Pasted' Message Displaying?

That type of message will display if you have copied multiple values and try to paste them into an area that does not match the size and shape of the area from which you copied the values. For example, values from three adjacent, vertical cells in this column were copied.

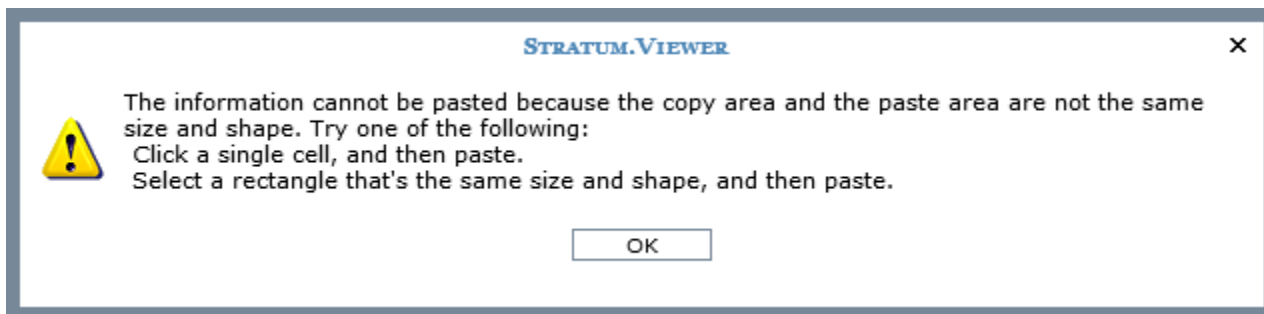
	Product >>	622A914003		
	Prod Long Description	Applesauce 12oz BR* 2A		
<u>Year</u>	<u>Months</u>	 Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	92	89	\$3,883
	February	161	157	\$6,780
	March	21	20	\$871
	April			
	May			
	June			
	July		98	\$3,086
	August			
	September		104	\$3,780
	October			
	November			
	December	(8)		
Grand Total		376	468	\$18,400



Then the user selected two adjacent, vertical cells in another column, right-clicked, and selected Paste.

Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	92	89	\$3,883
		161	157	\$6,780
		21	20	\$871
			98	\$3,086
		86	104	\$3,780
	November	24		
	December	(8)		
Grand Total		376	468	\$18,400

The paste cannot be completed because the area selected does not match the size of the copied area.



Why is an 'Invalid Selection to Paste' Message Displaying?

The following message displays because you have copied multiple values and are attempting to paste them into non-adjacent cells in the grid. You can proceed with a paste if you select a single cell or adjacent cells that match the size and shape of the cells from your copied values.



Three values were selected then copied in this example.

	Product >>	620A914003			620B914003		
	Prod Long Description	Applesauce 12oz BR* 0A			Applesauce 12oz BR* 0B		
Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	84	82	\$3,567	169	164	\$7,111
	February	12	12	\$500	24	23	\$900
	March	30	29	\$1,240	59	57	\$2,400
	April						
	May	117	142	\$4,990	234	284	\$9,900
	June	176	74	\$2,399	353	147	\$4,700
	July	13	166	\$5,189	27	331	\$10,300
	August			\$2,243	110	153	\$4,400
	September			\$14,010	637	773	\$28,000
	October						
	November				5		
	December				(7)		
Grand Total				\$34,138	1,610	1,933	\$68,200

- Copy
- Paste
- Select All
- Insert
- Edit
- Actions
- Transpose
- View Explorer

Then three non-adjacent cells were selected. Selecting the Paste option at this point would cause the invalid selection message to display.

	Product >>	620A914003			620B914003		
	Prod Long Description	Applesauce 12oz BR* 0A			Applesauce 12oz BR* 0B		
Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	84	82	\$3,567	169	164	\$7,111
	February	12	12	\$500	24	23	\$900
	March	30	29	\$1,240	59	57	\$2,400
	April						
	May	117	142	\$4,990	234	284	\$9,900
	June	176	74	\$2,399	353	147	\$4,700
	July	13	166	\$5,189	27	331	\$10,300
	August	55	77	\$2,243	110	153	\$4,400
	September	319	386	\$14,010	637	773	\$28,000
	October						
	November	3			5		
	December	(3)			(7)		
Grand Total		805	966	\$34,138	1,610	1,933	\$68,200

You can proceed with the paste by changing the selected area, as done below. A single cell that had enough Updated enabled cells below it to accept the full paste was right-clicked and then Paste was selected from the grid pop-up menu.

	Product >>	620A914003			620B914003		
	Prod Long Description	Applesauce 12oz BR* 0A			Applesauce 12oz BR* 0B		
Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	84	82	\$3,567	169	164	\$7,1
	February	12	12	\$500	24	23	\$9
	March	30	29	\$1,240	59	57	\$2,4
	April						
	May	117	142	\$4,990	234	284	\$9,9
	June	176	74	\$2,399	353	147	\$4,7
	July	13	166	\$5,189	27	331	\$10,3
	August	55	77	\$2,243	110	153	\$4,4
	September	319	386	\$14,010	637	773	\$28,0
	October						
	November	3			5		
	December	(3)			(7)		
Grand Total		805	966	\$34,138	1,610	1,933	\$68,2

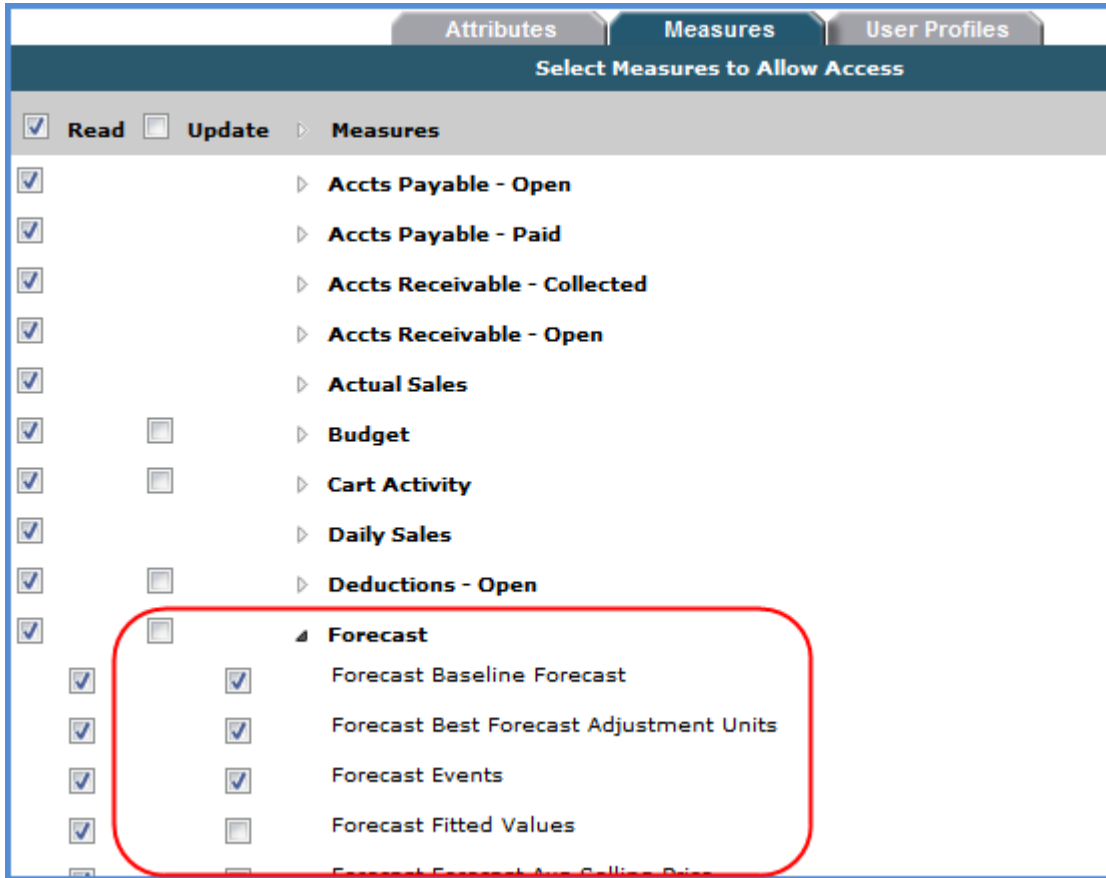
- Copy
- Paste
- Select All
- Insert
- Edit
- Actions
- Transpose
- View Explorer

	Product >>	620A914003			620B914003		
	Prod Long Description	Applesauce 12oz BR* 0A			Applesauce 12oz BR* 0B		
Year	Months	Budget Units Working	Actual Sales Units	Actual Sales Amount	Budget Units Working	Actual Sales Units	Actual Sales Amount
2014	January	84	82	\$3,567	169	164	\$7,1
	February	12	12	\$500	24	23	\$9
	March	30	29	\$1,240	59	57	\$2,4
	April						
	May	117	142	\$4,990	234	284	\$9,9
	June	176	74	\$2,399	353	147	\$4,7
	July	142	166	\$5,189	27	331	\$10,3
	August	74	77	\$2,243	110	153	\$4,4
	September	166	386	\$14,010	637	773	\$28,0
	October						
	November	3			5		
	December	(3)			(7)		
Grand Total		801	966	\$34,138	1,610	1,933	\$68,2

Why is an Update Checkbox Disabled for a Role's Category?

Properties in the Attributes tab of the Role Maintenance window impact whether or not Update checkboxes on the Measures tabs will be enabled. If the Access drop-down list for a dimension attribute is set to None, then the Update checkboxes will be disabled for Categories that include the dimension.

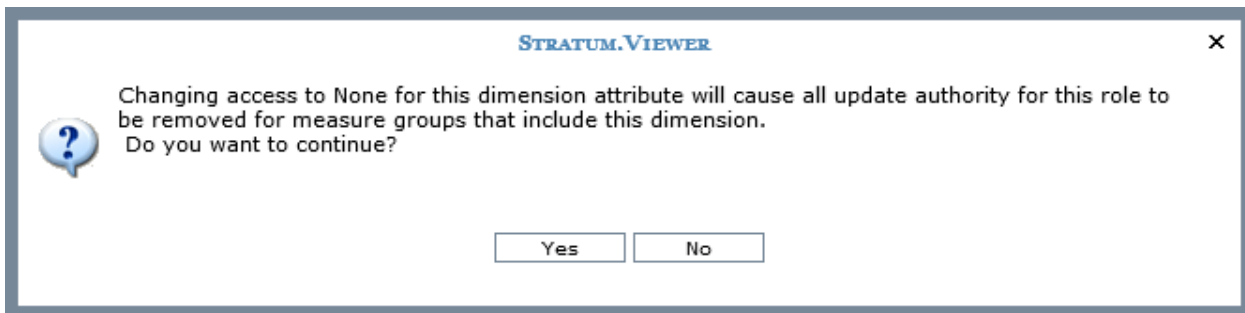
In this example role, the checkboxes for Forecast are enabled, and Update has been selected for a few Forecast measures.



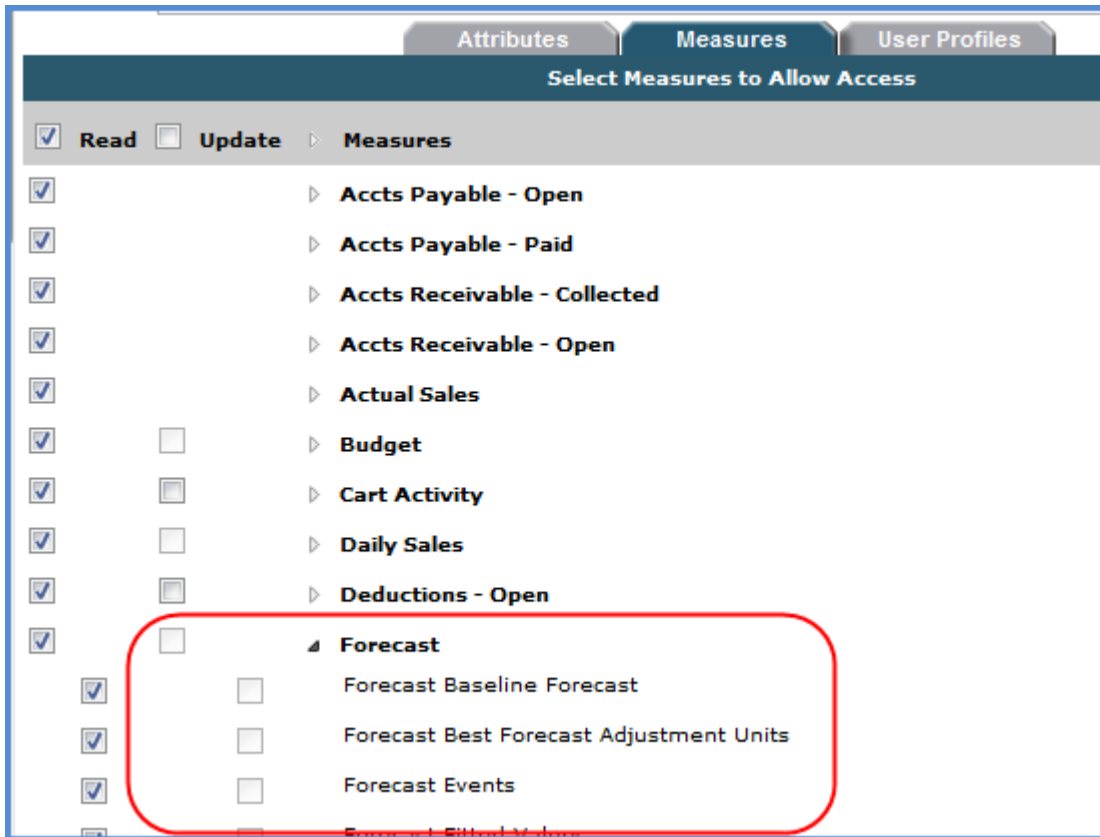
The next image shows an edit being made to a dimension attribute for the role. The Access drop-down list for Company Value is set to None. Update authority for the role will be removed for all measure groups that include the Company dimension. Update checkboxes for them will be disabled.

Select Attributes to Allow Access		
Dimensions	Attributes	Access
ABC Classification Code	ABC Classification Code Value	All
Account Group	Account Group Value	All
Activity Account	Activity Account Value	All
Buyer	Buyer Value	All
Commitment Identifier	Commitment Identifier Value	All
Commitment Type	Commitment Type Value	All
Commodity Code	Commodity Code Value	All
Company	Company Value	All
Cost Object Activity	Cost Object Activity Value	None
Currency	Currency Value	Partial - User List
Customer Class	Customer Class Value	All

A message displays to warn administrators about the impact of choosing None.



Here is the Measures tab after the change. The Update checkboxes for Forecast and all its measures are disabled. Users with this role will have read access only to Forecast measure items in views.



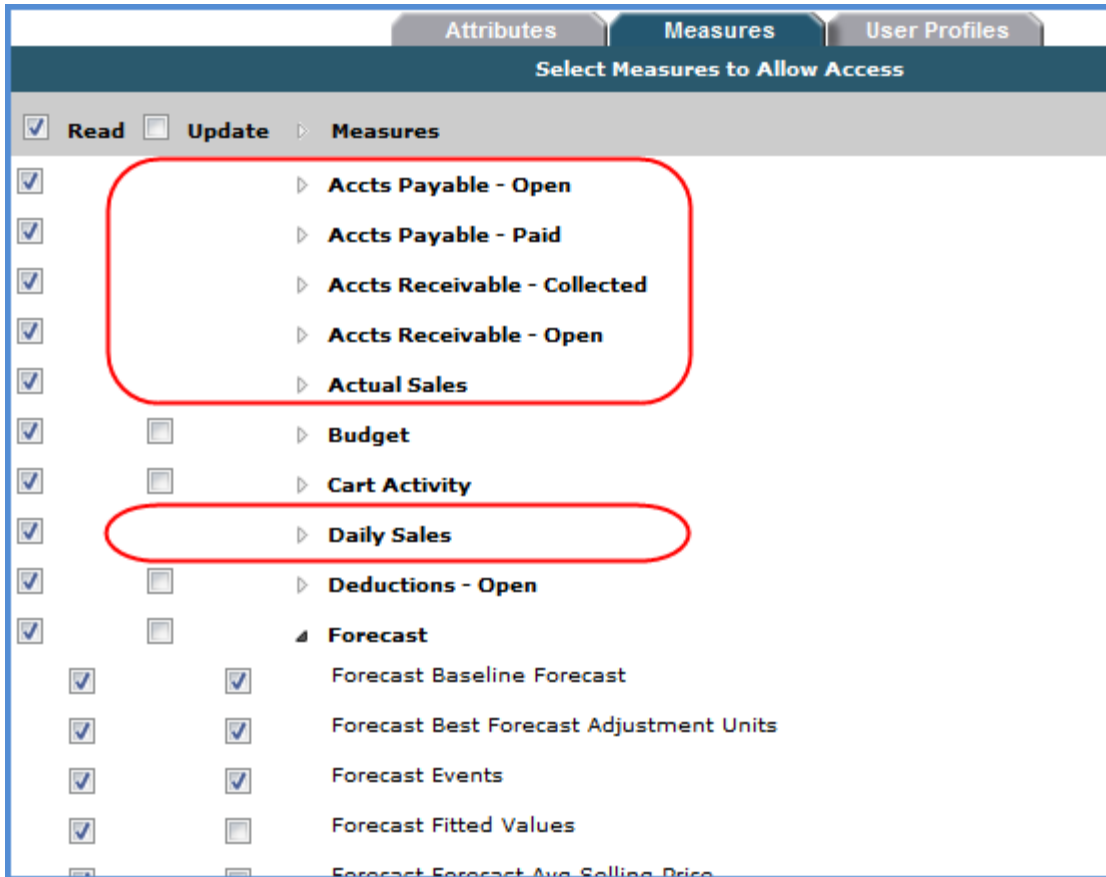
Why isn't there a Paste Option on the Grid Pop-up Menu?

The grid pop-up menu only includes a Paste option for views that have the Planning property set to Yes.


Why isn't there an Update Checkbox Available for a Role's Category?

A Category (measure group) on the Role Maintenance window will have an Update checkbox only if its Update Enabled property in Stratum.Connector for Viewer has been enabled.

The circled Categories (measure groups) in the following example are Categories that were not Update Enabled in Stratum.Connector for Viewer. They do not have Update checkboxes. The remaining Categories have Update checkboxes because they are Update Enabled in Stratum.Connector.




Will my Pending Planning Changes Show up in Exported or Emailed Views?

No. Pending planning changes that are active in the view will not be considered when you export or email a view. If you want the changes reflected in the export or email, you must submit the planning changes before the export or email. Planning changes can be submitted by clicking the Process Your Planning Changes icon  in the grid toolbar.

Will Other Users See my Planning Changes?

Yes. Two things must happen before the planning updates in your views will be seen by other users.

1. You have submitted the updates for processing. That is done by clicking the Process Your Planning Changes  icon in the grid toolbar.

AND

2. The auto synch period on their connection from the Stratum.Viewer connection pool has elapsed. The connection pool occasionally refreshes the user connection while the user is signed onto Stratum.Viewer.

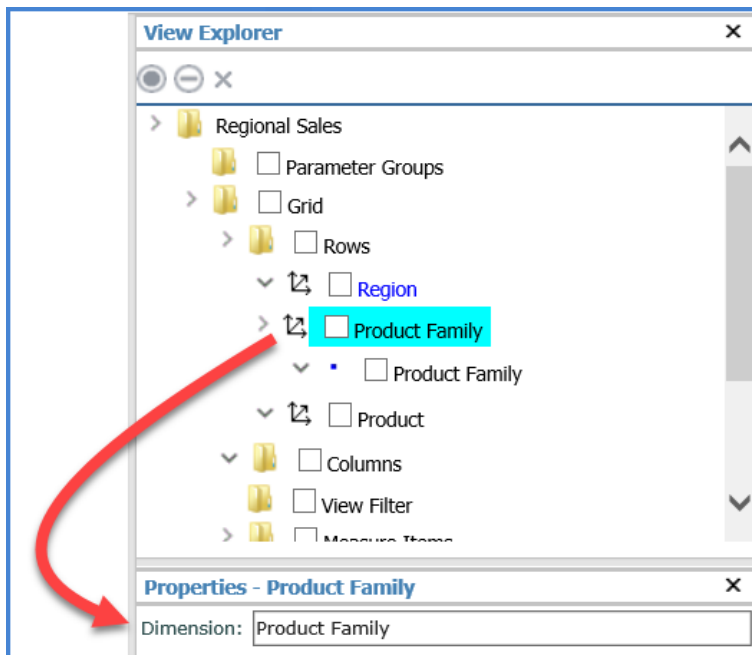
Definitions

Dimension

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

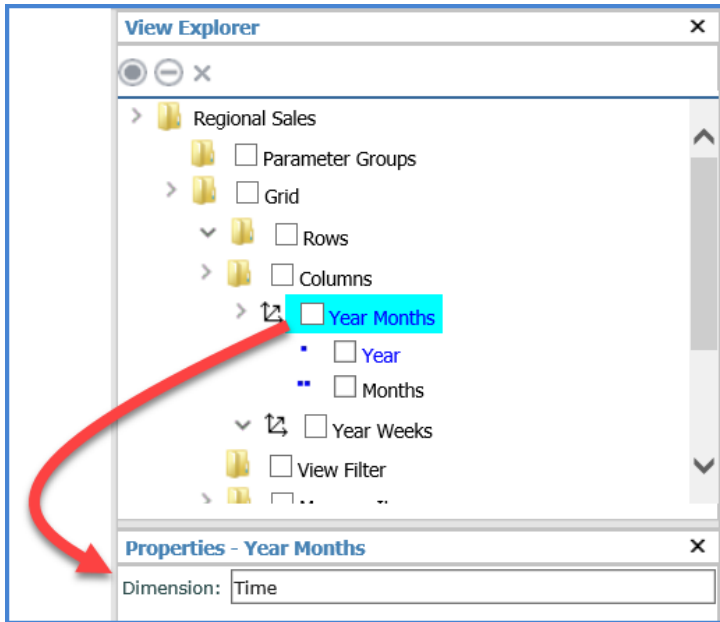
Dimension with Single Hierarchy

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



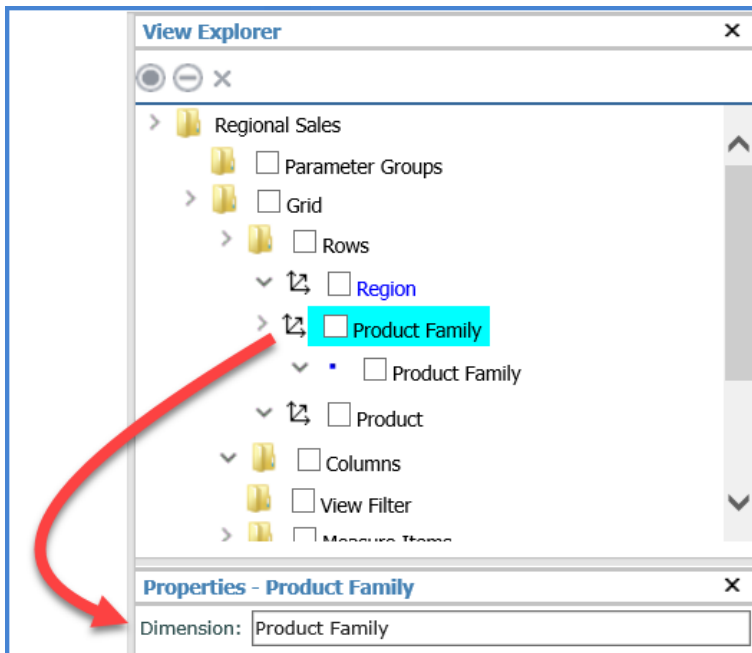
Dimension with Multiple Hierarchies

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



Hierarchy

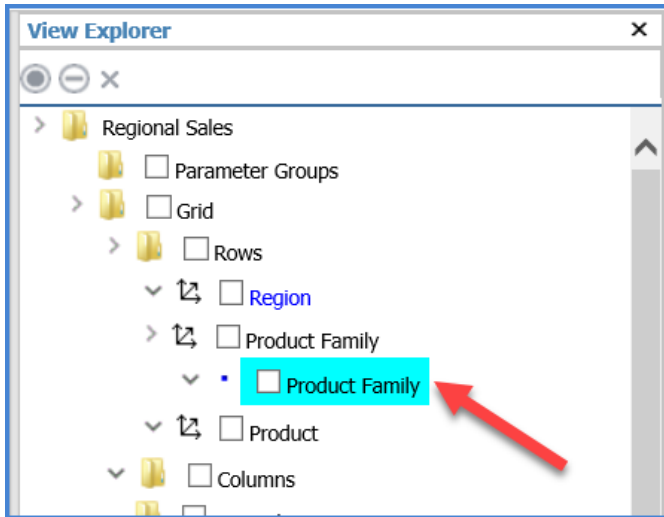
There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Hierarchies belong to dimensions and contain at least one level, which in turn contain members. You can see an example of this structure in view explorer. In the following example, there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



Measure

Measures are the basic units of data for your dimensions, hierarchies, and levels. Measures are used to create and insert measure items into your views. They can also be used when building the expressions for calculated measure items.

The two measure items in the following view were created from two Daily Sales measures using the Add Measure Item window.

View Name: <i>Daily Sales by Customer Type</i>			
View Filter			
<u>Customer Type</u>	<u>Ship-To Territory</u>	Daily Sales Daily Sales Amount Wk 37 2014 to Wk 38 2014	Daily Sales Daily Sales Units Wk 37 2014 to Wk 38 2014
<u>Class B Customer</u>	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

ADD MEASURE ITEM ✕

Search For: Search By: Measure ▾ Contains ▾ Find Stop

Budget	Budget Budget ASP Frozen
Budget	Budget Budget ASP Working
Budget	Budget Budget Units Frozen
Budget	Budget Budget Units Working
Budget Calc Values	Budget Calc Values Budget Amt Working Calc
Budget Calc Values	Budget Calc Values Budget Units Working Calc
Budget Calc Values	Budget Calc Values Budgeted ASP Working Calc
Budget Calc Values	Budget Calc Values Budget Amt Frozen Calc
Budget Calc Values	Budget Calc Values Budget Units Frozen Calc
Budget Calc Values	Budget Calc Values Budgeted ASP Frozen Calc
Daily Sales	Daily Sales Daily Sales Amount
Daily Sales	Daily Sales Daily Sales Units
Deductions Open	Plan by Cust Ship To Actual
Deductions Open	Plan by Cust Ship To Working
Forecast	Forecast Baseline Forecast
Forecast	Forecast Best Forecast Adjustment Units
Forecast	Forecast Events
Forecast	Forecast Fitted Values

Time Unit: Weeks ▾

From Year: Current Year ▾	To Year: Current Year ▾
Period: Week 37 ▾	Period: Week 38 ▾
Offset: <input type="text" value="0"/>	Offset: <input type="text" value="0"/>

OK Add Exit Help

Regular Measure Item

Regular measure items are items based on the measures in the Analysis Services database for your Stratum.Viewer environment.

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: <i>Daily Sales by Customer Type</i>			
View Filter			
<u>Customer Type</u>	<u>Ship-To Territory</u>	Daily Sales Daily Sales Amount Wk 37 2014 to Wk 38 2014	Daily Sales Daily Sales Units Wk 37 2014 to Wk 38 2014
<u>Class B Customer</u>	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
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	Central Provinces	\$529,959	4,555
	Eastern Atlantic Provinces	\$596,137	5,502
Grand Total		\$3,990,880	35,784

Role

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

Time Hierarchy

A time hierarchy is a hierarchy from the Time dimension. The Time dimension, its hierarchies, and its levels are a means of organizing the years and time periods (for example, days, weeks, months, and quarters) that will be available for use in setting up views. Stratum.Connector for Viewer creates the Time dimension, its hierarchies, and levels based on the Stratum.Server ViewGroups and View Sets associated with the measure groups selected for your Analysis Services database.

There are two time hierarchies in this example, and both belong to the Time dimension. The Year Months hierarchy (↕) has Year (▪) and Months (▪▪) levels. The Year Weeks hierarchy (↕) has Year (▪) and Weeks (▪▪) levels. Other examples of time hierarchies are Year Based Months Based, Rolling Year Based Months Based, and Months.

