

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

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*

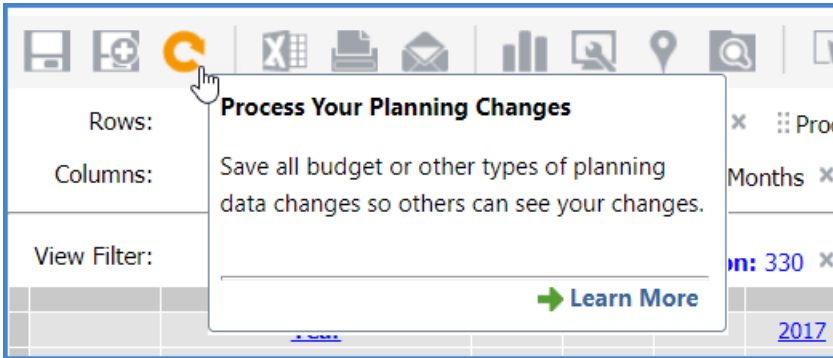
View Filter

| 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 >> 300 | | | | | | | | | | | |
| | | RepBr Long Description Nicole Toscano | | | | | | | | | | | |
| | | Product Brand >> 001 | | | 002 | | | 003 | | | 00 | | |
| | | 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 | | |
| 2014 | 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 | | |
| 2015 | 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 | | | |
| | 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 | | | 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.

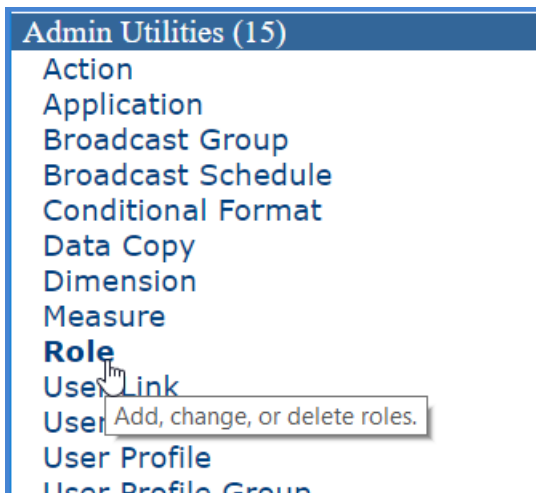


Quick Start – Set Up Planning Security

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 | | |

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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 | | Measures |
|-------------------------------------|-------------------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Read Update |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Accts Payable - Open |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Accts Payable - Paid |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Accts Receivable - Collected |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Accts Receivable - Open |
| <input checked="" type="checkbox"/> | <input 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"/> | <input type="checkbox"/> | Daily Sales |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Deductions - Open |
| <input checked="" type="checkbox"/> | <input checked="" 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

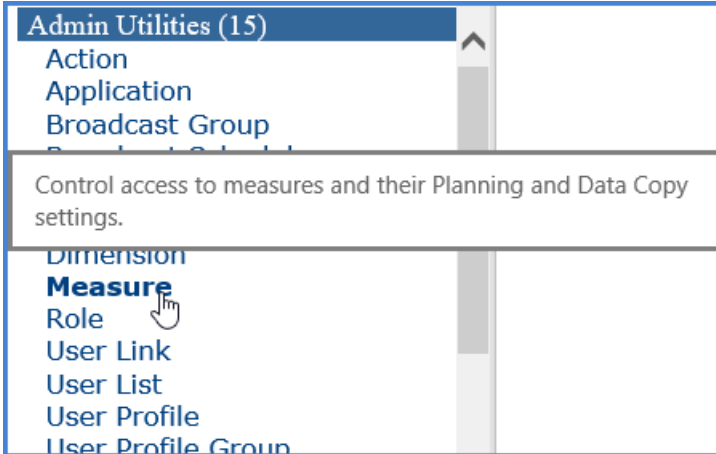
Save  the role.

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 table contains several rows of forecast measures. The first four rows have their 'Category' checkboxes checked. The 'Planning Enabled' column has a dropdown arrow.

| 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 | ▼ |

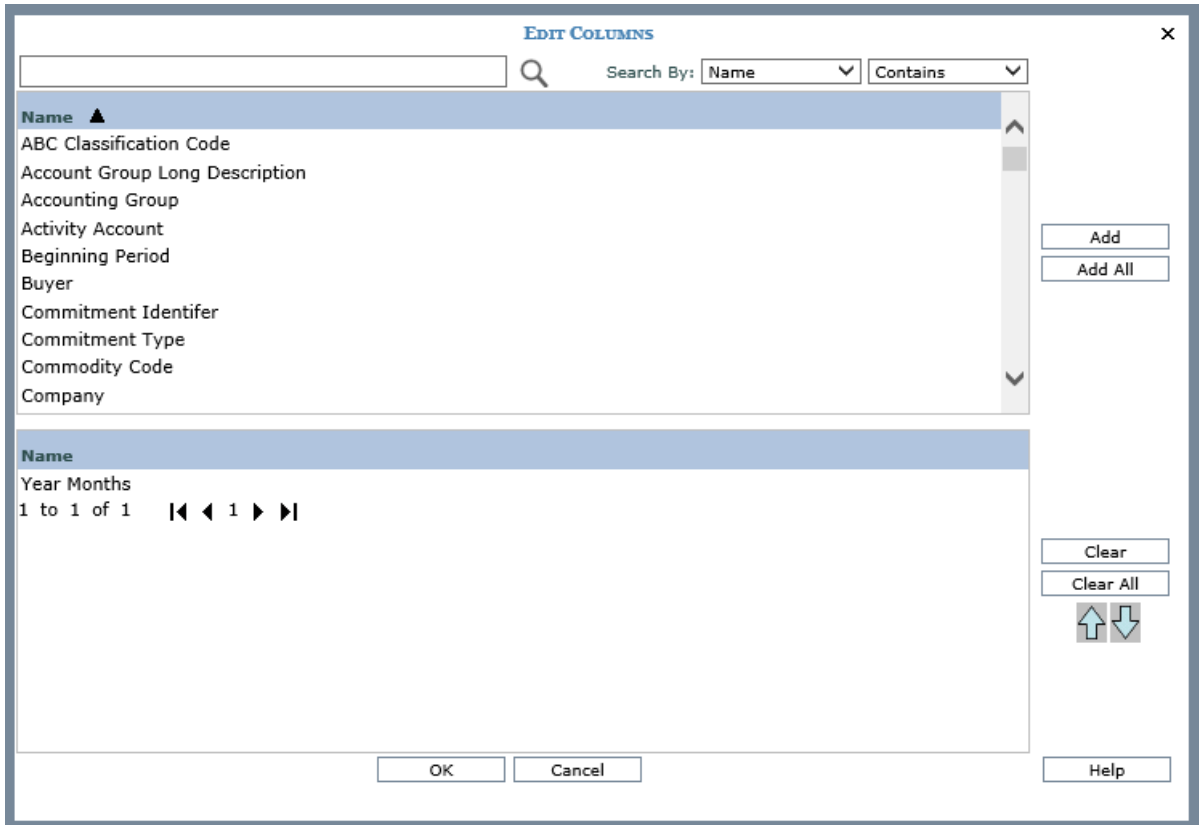
4

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.

The screenshot shows a dialog box titled "EDIT ROWS" with a search bar and two dropdown menus: "Search By: Name" and "Contains". Below the search bar is a list of categories under the heading "Name ▲". The categories are: ABC Classification Code, Account Group Long Description, Accounting Group, Activity Account, Beginning Period, Buyer, Commitment Identifier, Commitment Type, Commodity Code, and Commodity Code. To the right of the list are buttons for "Add" and "Add All". Below the list is a second section with the heading "Name" and a list of categories: RepBroker, Product Brand, and Product. Below this list is a pagination indicator "1 to 3 of 3" and navigation arrows. To the right of this list are buttons for "Clear" and "Clear All", and two arrow icons (up and down). At the bottom of the dialog box are buttons for "OK", "Cancel", and "Help".

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.
 - 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.

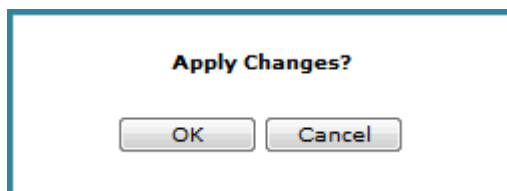
Make Measures "Planning Allowed" for Views

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.
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.

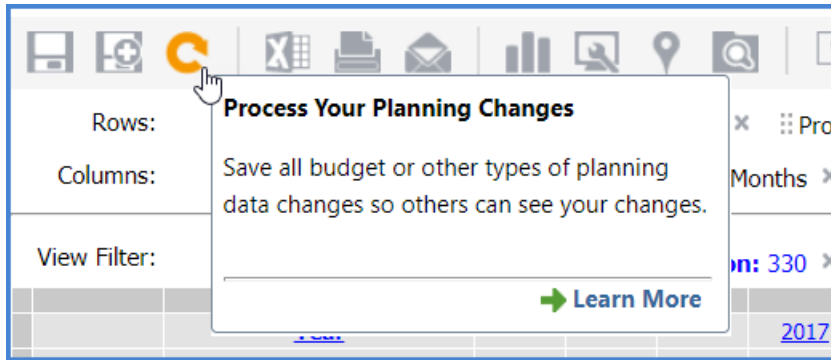
- **Paste a single value into a single cell** – Right-click the planning enabled cell and select Paste.
 - **Paste a single value into multiple cells** – A single value can be pasted into adjacent or non-adjacent cells.
 - **Adjacent cells** - Click the first cell of the area where you want to paste. 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](#).

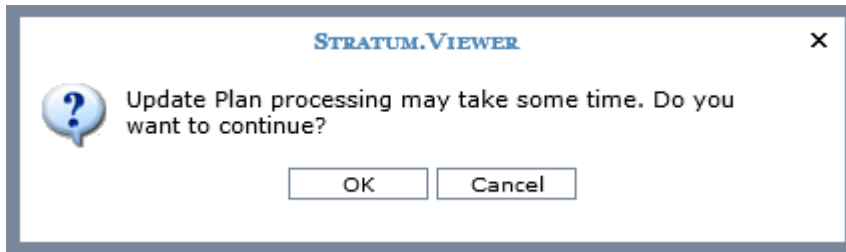
Submit Planning Changes for Processing

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 | | |
|--------------------|--------------------------------|---------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Y Year >> | | January | February | March | April | May | June | July | August | September | October | November | December | 2015 Total | January | Febru |
| Y Customer Class | | Y 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 |
| 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 Uni 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 | |
| | | 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 | | | | | | | |

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 | 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 | 2,145,000 | 1,074,876 | 2,145,000 |
| | | Last Year 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 | 2,145,000 | 1,074,876 | 2,145,000 |
| 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 | 2,145,000 | 1,074,876 | 2,145,000 |

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 | 3,120,276 | 2,795,392 |
| | | | Budget Budget Units Working | 835,273 | 835,674 | 1,850,050 | 1,446,922 | 2,304,317 | 2,145,537 |
| | | Last Year Total | Actual Sales Sales Units | 1,072,762 | 1,074,528 | 2,379,379 | 1,856,485 | 3,120,276 | 2,795,392 |
| | | | Budget Budget Units Working | 835,273 | 835,674 | 1,850,050 | 1,446,922 | 2,304,317 | 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 | 3,120,276 | 2,795,392 |
| | | | Budget Budget Units Working | 835,273 | 835,674 | 1,850,050 | 1,446,922 | 2,304,317 | 2,145,537 |
| | | Last Year Total | Actual Sales Sales Units | 1,072,762 | 1,074,528 | 2,379,379 | 1,856,485 | 3,120,276 | 2,795,392 |
| | | | Budget Budget Units Working | 835,273 | 835,674 | 1,850,050 | 1,446,922 | 2,304,317 | 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 | | 2,107,452 | 2,379,379 | |
| | | | Budget Budget Units Working | | 835,674 | 1,851,050 | |
| | Last Year Total | | Actual Sales Sales Units | | 2,107,452 | 2,379,379 | |
| | | | Budget Budget Units Working | | 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 >> <u>Third Quarter</u> | | |
|-------------------|----------------|------------------|---------------------------------|----------------------------------|------------------|-----------------|
| <u>Year Based</u> | <u>Company</u> | <u>Region</u> | <u>Product Family >></u> | <u>30</u> | <u>31</u> | <u>50</u> |
| <u>Last Year</u> | <u>100</u> | <u>330</u> | Actual Sales Sales Units | 846,268 | 825,805 | 1,807,54 |
| | | | Budget Budget Units Working | 654,392 | 651,733 | 1,807,54 |
| | | <u>331</u> | 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 | 2,379,31 |
| | | | 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: ▾

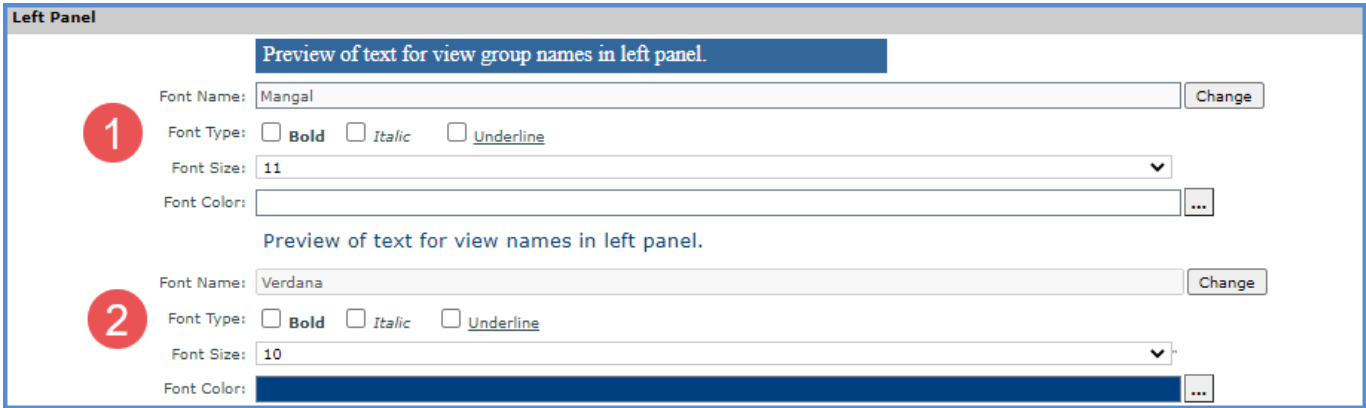
5 Customer Number:

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> |
| 3 | <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> |
| 4 | <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> |
| 5 | <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> |

Left Panel Section



| | |
|---|---|
| 1 | <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 names will look like as you change the settings displays above the Font Name field.</p> |
| 2 | <p>Views - The settings in this section control the format of view names in the left panel and format of view names in the Favorites and Recently Used Views window. You can customize the font style (name), type (Bold, Italic, Underline), size, and color. A preview of what the names will look like as you change the settings displays above the Font Name field.</p> |

Views Section

The screenshot shows a configuration window titled "Views". It is divided into two sections. The first section, labeled with a red circle containing the number "1", contains the following properties: "Base Color" (white), "Alternating Row Color" (light gray), "Total Row Color" (light gray), "Border Color" (light gray), "Data Captions Font" (Segoe UI, 12pt, black), "Font Color" (black), "Data Values Font" (Segoe UI, 12pt, black), and "Font Color" (black). Each property has a "Reset" button. The second section, labeled with a red circle containing the number "2", contains "Page Size" (Rows: 50, Columns: 10), a "Logo" field with a "Choose File" button, and a "Remove Picture?" checkbox.

1

Properties That Control Default Look Of All View Grids – The properties described below control the default look assigned to the grid for all views.* Properties available to control the look of the grid are:

- **Base Color** - The fill color for all cells in rows and columns.
- **Alternating Row Color** - A secondary fill color used for every other row in grid.
- **Total Row Color** - The fill color for subtotal and grand total rows and columns.
- **Border Color** – The color for borders in the grid. You can give the grid an appearance of having no visible borders by setting this Border color to be the same as the Base color for the grid. That will make the borders blend into the grid background. For example, make borders white if the Base color is white.
- **Data Captions Font** - The font, font size, and font color used for captions of measure items, levels, and attribute relationships in the grid.
- **Data Values Font** - The font, font size, and font color used for values of measures in the grid.

If you want to revert a property back to its default, click Reset for the property. Resetting all properties reverts to a default look of white for the base, alternating, and total row fill colors; light gray borders; font settings of Segoe UI/Black/12pt for all captions; and font settings of Segoe UI/Black/12pt for all measure item values in the grid.

***Note:** All of these properties can be overridden by users in their individual views.

2

Page Size, Rows and Columns - 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.

Logo – Optionally 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. Click the Choose File button to navigate to the image, then click Open in the Choose File window to upload a copy of the image. The image file will be copied to the Viewer application folder. To remove a logo, select the Remove Picture? checkbox.

Excel Files Section

Excel Files

1 Font Name: Arial Change

Font Size: 13

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


Measure Item Caption Expression

Regular with Time Range: [Measure] [From Period Short Desc] [From Year YYYY] to [To Period Short Desc] [To Year YYYY] ...

1 Regular: [Measure] ...

Calculated: [Name] ...

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.

[Measure]
- **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.

[Name]

Upload File Location Section

| Upload File Location | |
|----------------------|---|
| 1 | Master Data Import: <input "="" type="text" value="\\serverabc\D\$\Uploaded Import Files\Master Data Import\"/> |
| | Data Import: <input "="" type="text" value="\\serverabc\D\$\Uploaded Import Files\Data Import\"/> |

| | |
|---|---|
| 1 | <p>Upload File Location – This property is applicable when Master Data Import or Data Import functionality are used with your implementation. These locations are used by Data Import and Master Data Import.</p> <ul style="list-style-type: none">• The Master Data Import location is used when importing values into User Controlled Attributes.• The Data Import location is used when importing values into User Controlled Measures.• 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 Master Data Import and Data Import sections of help. |
|---|---|

Stratum.Viewer Server Section

| Stratum.Viewer Server | |
|-----------------------|---|
| 1 | SMTP Server: <input type="text" value="localhost"/> |

| | |
|---|---|
| 1 | <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> |
|---|---|

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 CustomerSupport@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> |

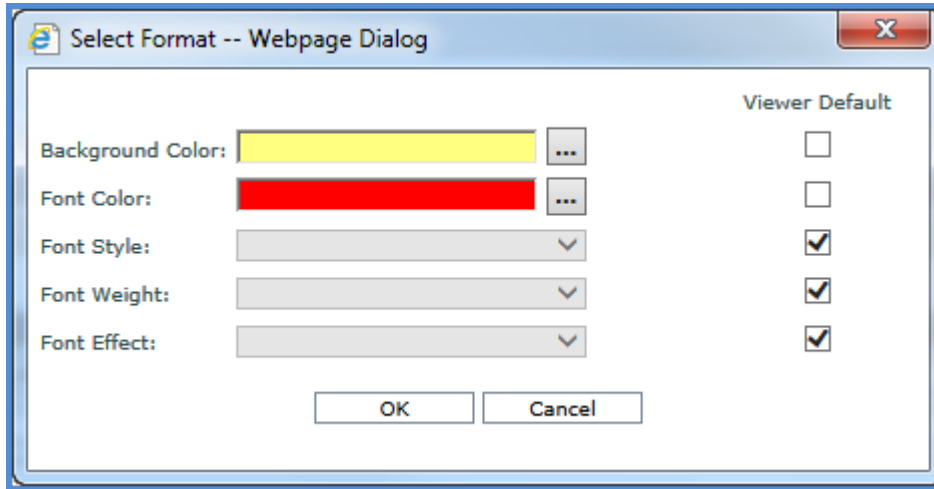
Planning Section

| 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 an invalid key, contact Silvon Support at (800) 474-5866 or CustomerSupport@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

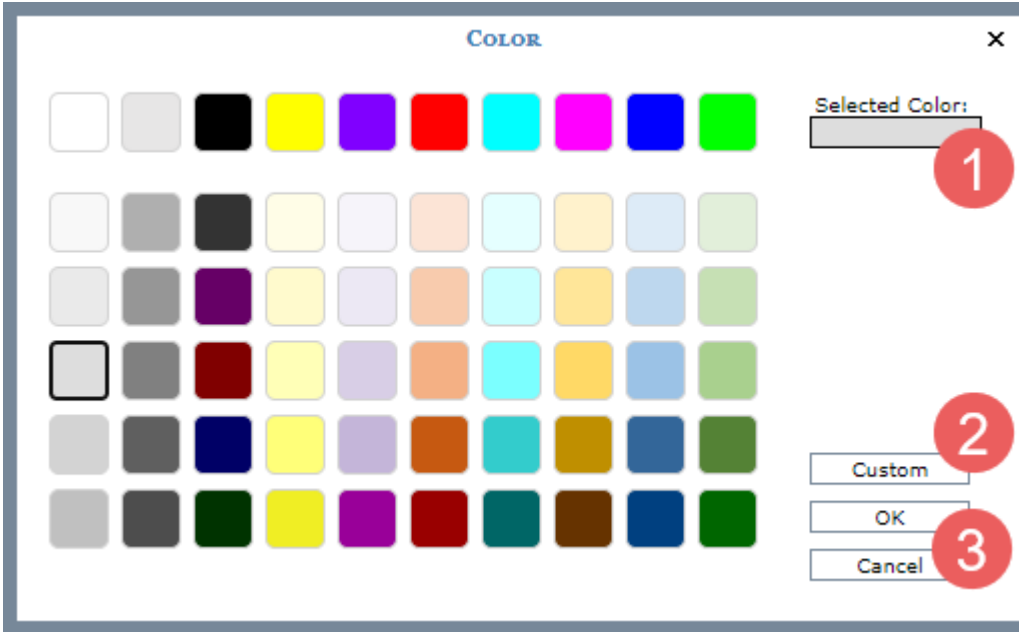
1

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 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 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 Silvion Support. The setting impacts how long parts of processes handled by Stratum.Connector are given to complete those parts before the process times out.

Color Window



1

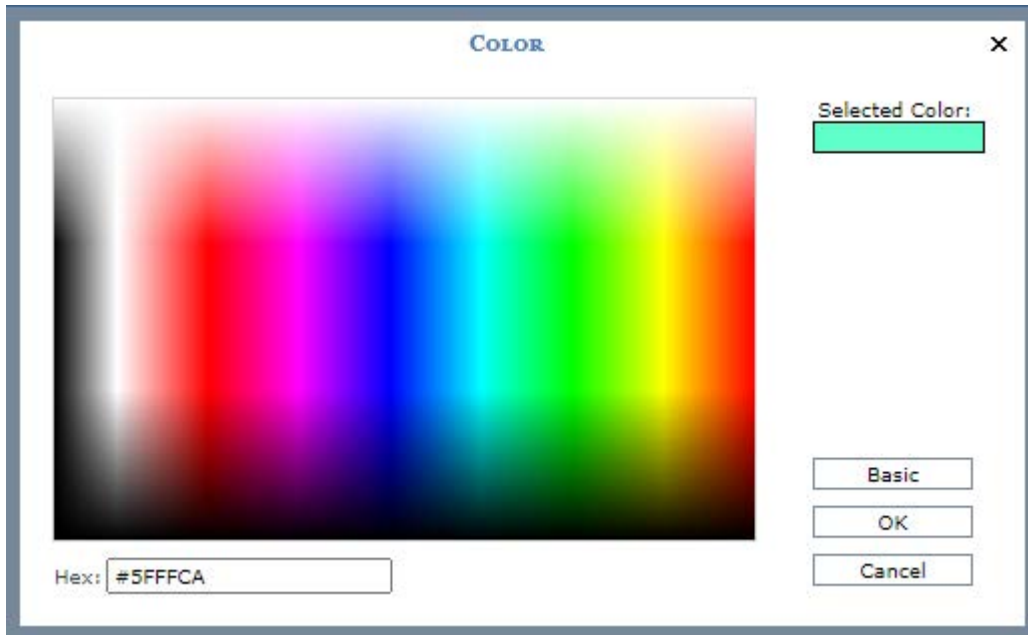
Selected Color – The color selected from the basic color palette displays here.

A variation on the Color window shown above displays when you are working with the fill color for individual columns of measure items, levels, or attribute relationships. That version of the window is used to select or remove a fill color for columns in the grid. Users click a color to select a fill or click the No Fill checkbox to remove the fill. The No Fill checkbox doesn't show in this window in any other cases, such as when choosing font colors from the Application window or when setting up Conditional Formats.



2

Custom – To define your own custom color, click the Custom button and click the desired color from the provided palette. You can also type in the Hex value for a color in the provided field as a shortcut to choosing a specific color. A valid Hex value begins with a pound sign # followed by the 6-character combination of letters and/or numbers that identify the color. For example, the value #FC4242. 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.

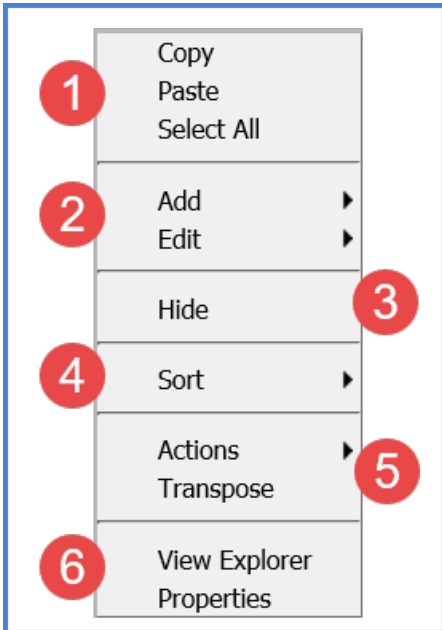
Cancel – Click Cancel to ignore any selections and close the window.

Grid Pop-up Menu

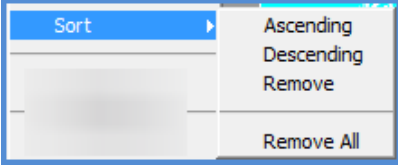
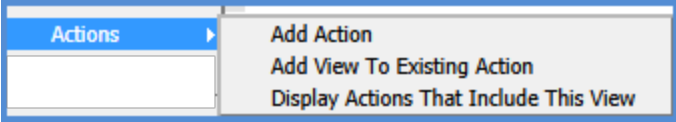
Right-click objects in views to display available functionality for them such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes. 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.

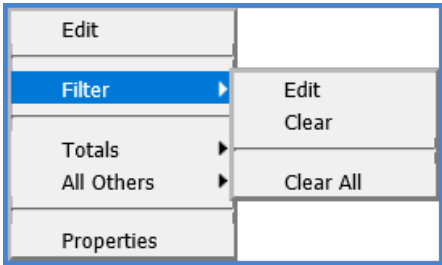


| | |
|----------|--|
| <p>1</p> | <p>Copy - This option allows you to copy sections of a view that you have selected.</p> <p>Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views.</p> <p>Select All - Use this option to select the entire grid.</p> |
| <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-bottom: 10px;"> <p>Add ▸</p> <ul style="list-style-type: none"> Attribute Relationships Regular Measure Item Calculated Measure Item Chart </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;"> <p>Edit ▸</p> <ul style="list-style-type: none"> Attribute Relationships Rows Columns View Filter </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

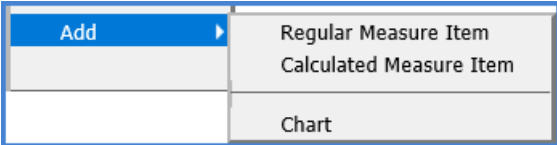
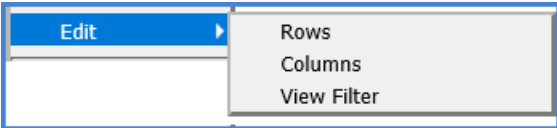
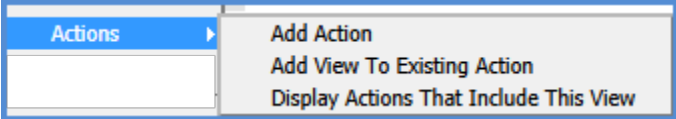
Right-click the Rows or Columns headings in the Navigation Panel (or their filter icon if an axis is filtered) to display a menu with options to edit properties of that axis including its filter, totals, or All Others properties. A shortcut to adding hierarchies to the Rows or Columns of a view is to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



General Pop-up Menu

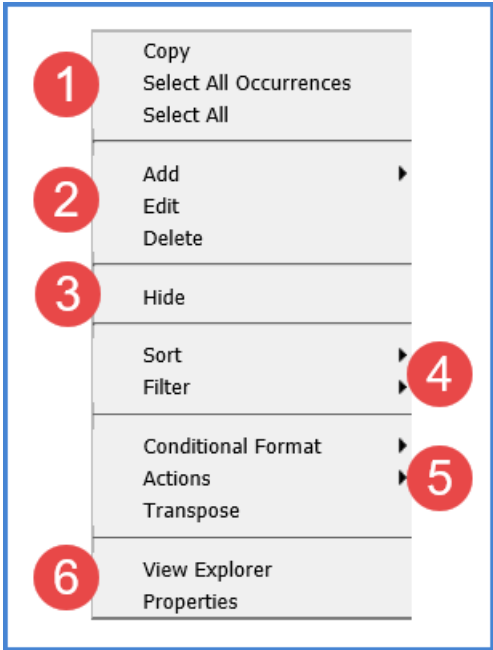
Right-click within the grid to display actions that you can take such as transposing the rows, columns, and measure items.



| | |
|---|--|
| 1 | <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> |
| 2 | <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>  |
| 3 | <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> |
| 4 | <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)

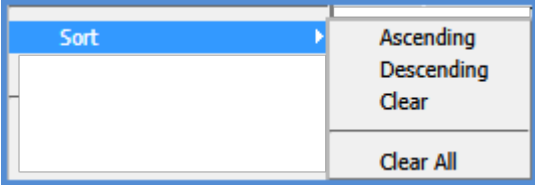
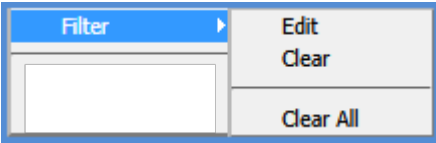
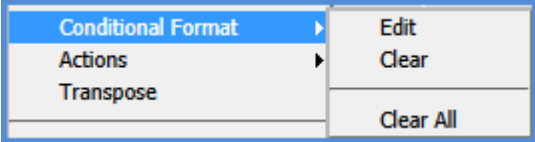
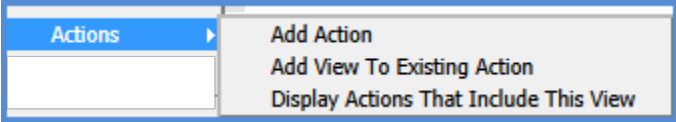
Measure items can be assigned to one axis, either rows or columns. Right-click the caption of a measure item in a detail row or column to display actions that you can take related to that object, such as inserting additional measure items or applying conditional formats.



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.

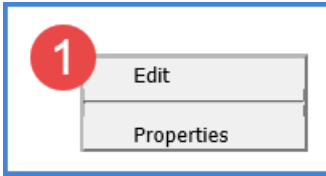
Descriptions follow of the menus for measure items in detail and Grand Total rows or columns.

| | |
|--|--|
| | <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

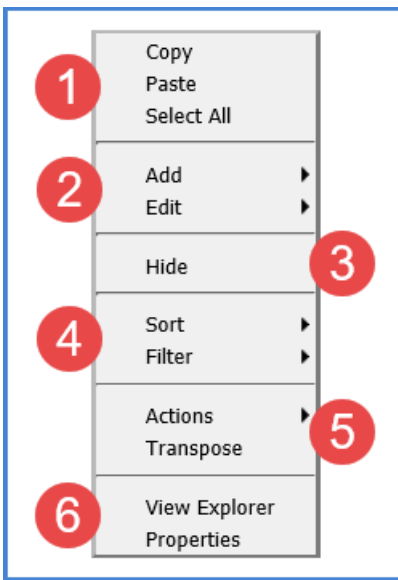
Right-click the View Filter heading to display actions that you can take related to that object or section of the grid, such as filtering levels in that section.

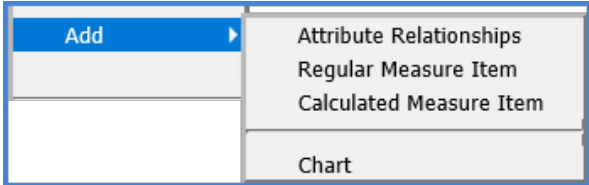


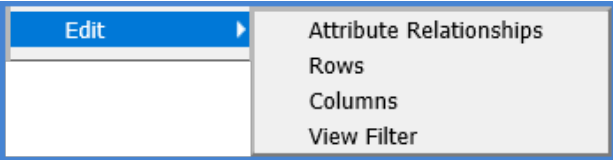
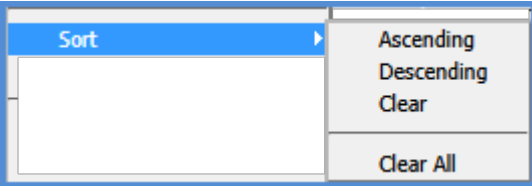
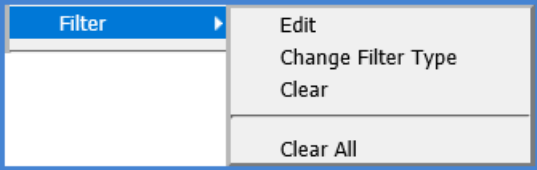
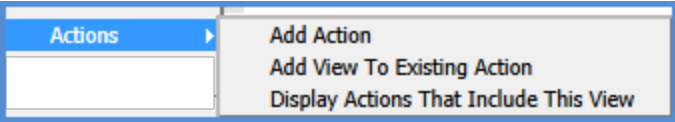
| | |
|---|---|
| 1 | Edit - Edit the hierarchies in the view filter. A shortcut to adding hierarchies to the View Filter is to click the Add icon + that's provided in the View Filter section of the view. |
|---|---|

Levels Pop-up Menu

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

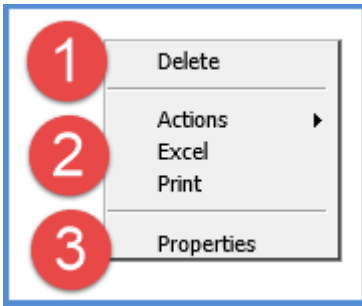


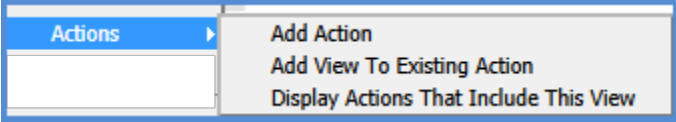
| | |
|---|--|
| 1 | Copy - This option allows you to copy sections of a view that you have selected. Paste - Allows you to paste data into update enabled cells. This option only shows in planning enabled views. Select All - Use this option to select the entire grid. |
| 2 | Add - The sub menu has options 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.












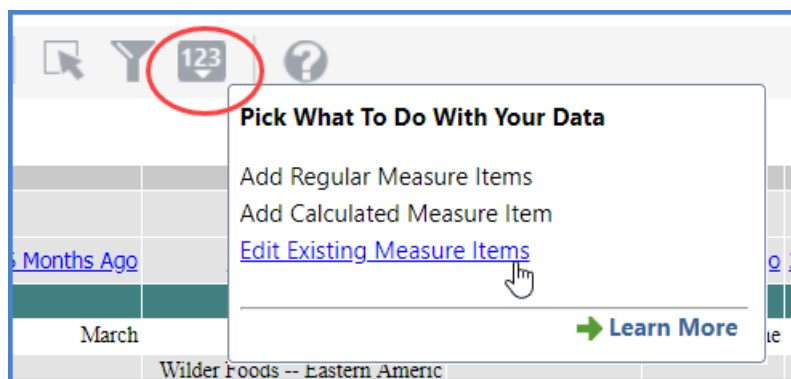
| | |
|----------|---|
| 1 | Delete - Choose Delete to delete the view with confirmation. Anyone can delete their own personal views, but only view and security administrators may delete global views. |
| 2 | <p>Actions – Use this option to add new actions, add the active view to existing actions, or 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 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.

[Learn More](#)

| 4 Months Ago | 3 Months Ago | 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 | budget;activity

| 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 | <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. 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.

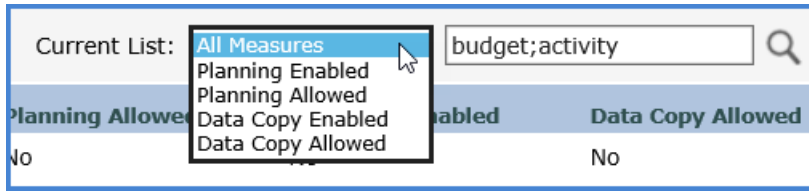
4

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.

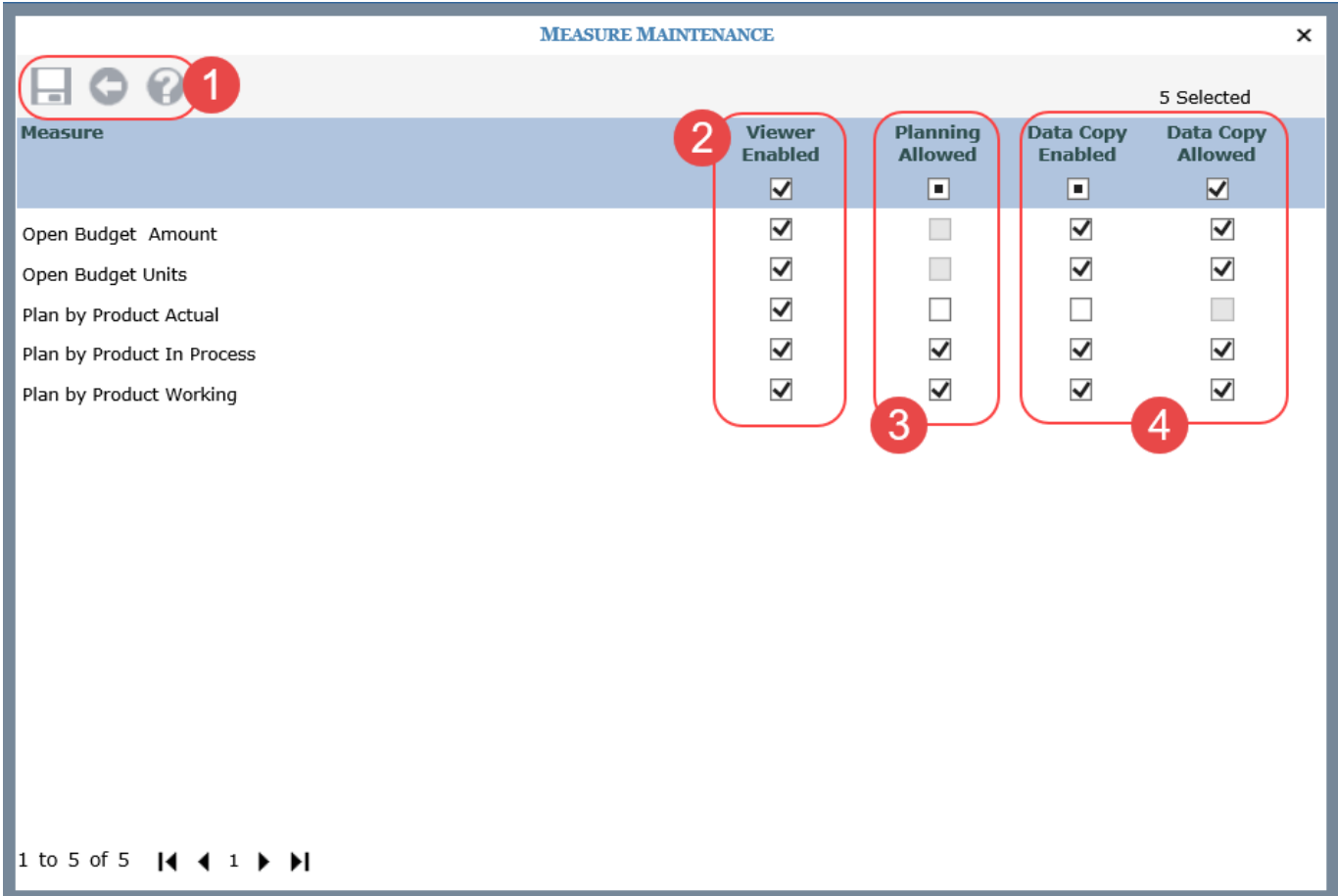
- **Data Copy Enabled** – Yes means measure can be updated by Data Copy. You will also need to set up authority to control which users are allowed to update Data Copy Enabled measures. Making a measure available as a Target measure is a two-step process of activating both its Data Copy Enabled and Data 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



| | |
|----------|--|
| <p>1</p> | <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. |
| <p>2</p> | <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.

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

The screenshot shows a 'Properties - Rolling 24 Week View' window with the following fields and values:

- 1** Name: Rolling 24 Week View
- Description: Product Sales Analysis
- Type: Global **2**
- Owner: Mary Leonard **2**
- Planning: No
- Export Type: Excel Report **3**
- View Details: Include In Exports
- 4** View Group: Specialty Views (selected from a list including My Reports, Planning Views, Sales Team Analysis, and 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. • 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 |
|----------|--|

| | |
|-----------------|---|
| | <p>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.</p> <ul style="list-style-type: none"> • 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>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>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> <hr/> <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

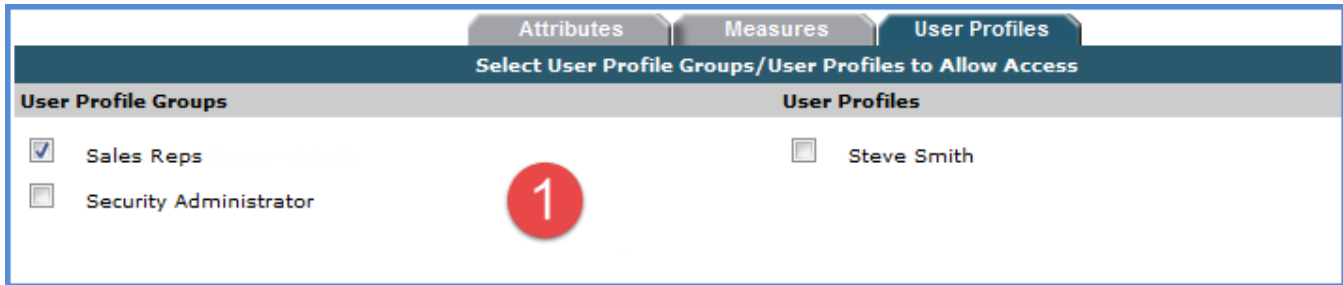
| | |
|----------|--|
| <p>1</p> | <p>Measures - Use the Measures tab to determine the measures to which users with this role will have read and update authority. For measures you don't want users of the role to access, de-select the Read checkboxes next to the measure. The corresponding Update checkboxes 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.

User Profiles Tab



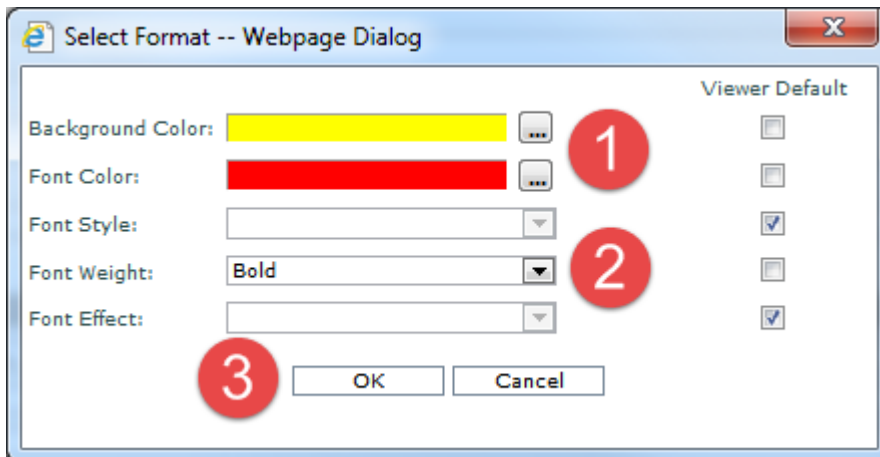
1

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 <input type="button" value="..."/> 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 the use the Browse button <input type="button" value="..."/> 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 <input type="button" value="v"/> 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 <input type="button" value="v"/> 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 <input type="button" value="v"/> 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

The screenshot shows the 'USER OPTIONS' dialog box. It has a title bar with 'USER OPTIONS' and a close button 'X'. The dialog is divided into two sections: 'Viewer Startup Options' and 'General'. In the 'Viewer Startup Options' section, there are two checked checkboxes: 'Show Favorite and Recently Used Views' (marked with a red circle '1') and 'Show Left Panel'. In the 'General' section, there are five checkboxes: 'Show Navigation Panel' (checked), 'Show View Explorer' (unchecked, marked with a red circle '2'), 'Auto Hide Left Panel' (checked), 'Override Planning Update Format' (unchecked, with a text box containing '1234.10' and a browse button '...'), and 'Override View Page Size' (checked). Below these are two text boxes: 'Rows: 40' and 'Columns: 10'. At the bottom, there are three buttons: 'OK', 'Cancel' (marked with a red circle '3'), and 'Help'.

| | |
|----------|---|
| <p>1</p> | <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> |
| <p>2</p> | <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> |
| <p>3</p> | <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

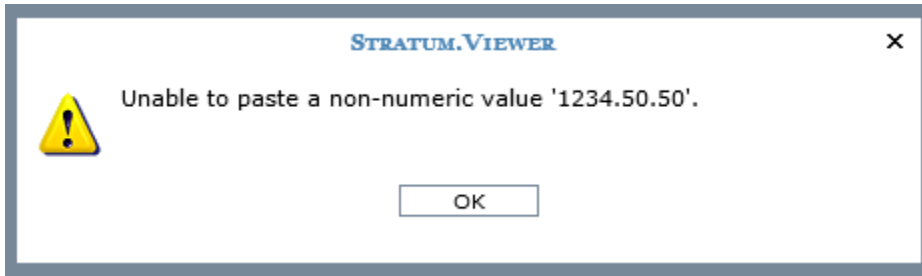
Characters and Values Considered Valid for Planning

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

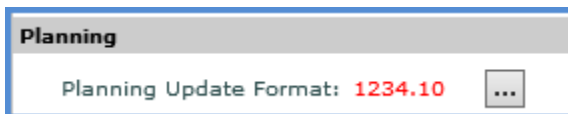
If you want to return to using application settings for planning formats, deselect the checkbox during step 2 below.

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.

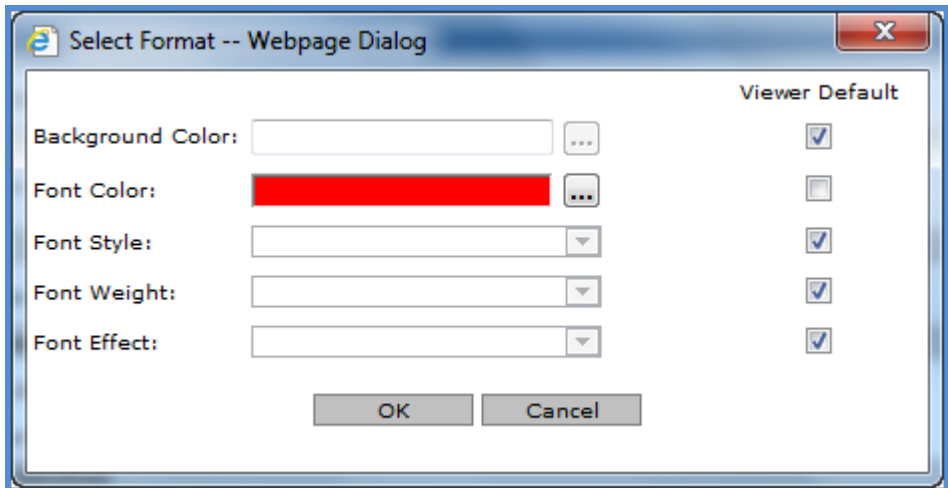
The default state of planning update properties upon first use of Stratum.Viewer is shown below. Security administrators can make adjustments to these defaults to match the preferences of your company. To do so, they click the Browse button  next to the Planning Update Format option and make changes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

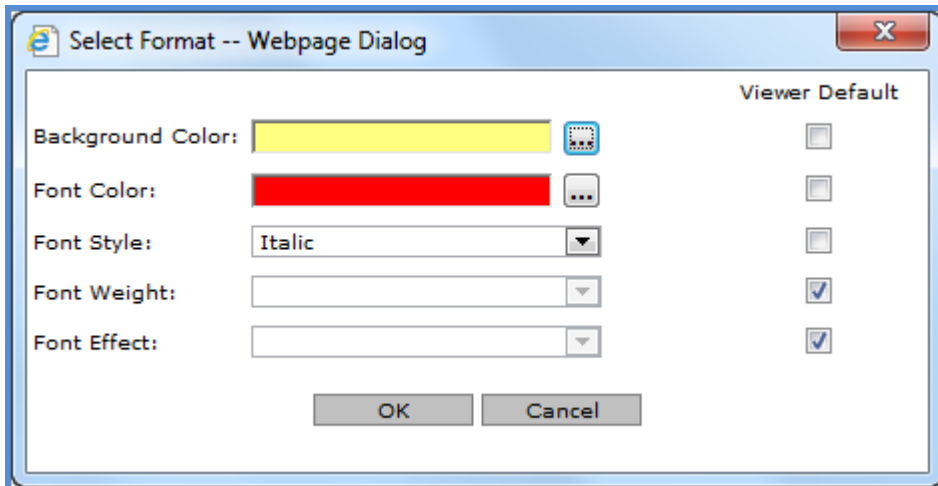


The next image shows a view after a few planning updates have been entered into a few cells. The values in red are the values that the user just updated. Values in total cells impacted by the updates also display in red.

| | | | 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.

| | | | | Y Year >> | | 2015 | | | 2016 | | |
|--------------------|------------------------|-----------------|--------------------------------|----------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|------------|
| | | | | Y Region >> | | 330 | 331 | 2015 Total | 330 | 331 | 2016 Total |
| | | | | Rgn Long Description | | East | West | | | East | West |
| Y Customer Class | CClas 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 | |
| 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.

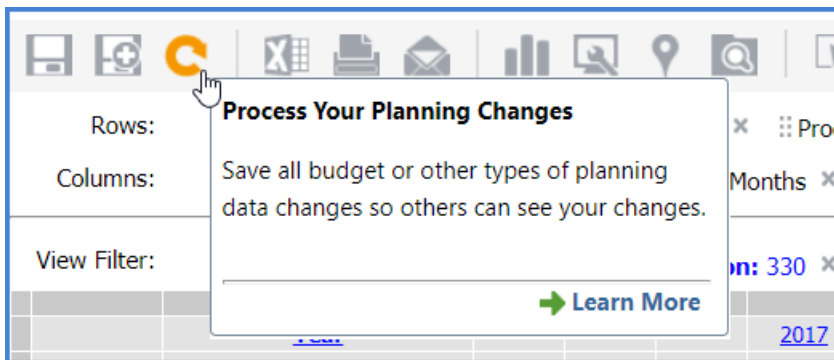
- To return any property to the Viewer Default, select its Viewer Default checkbox.

5. Click OK in the Select Format window.

6. Save  the changes.

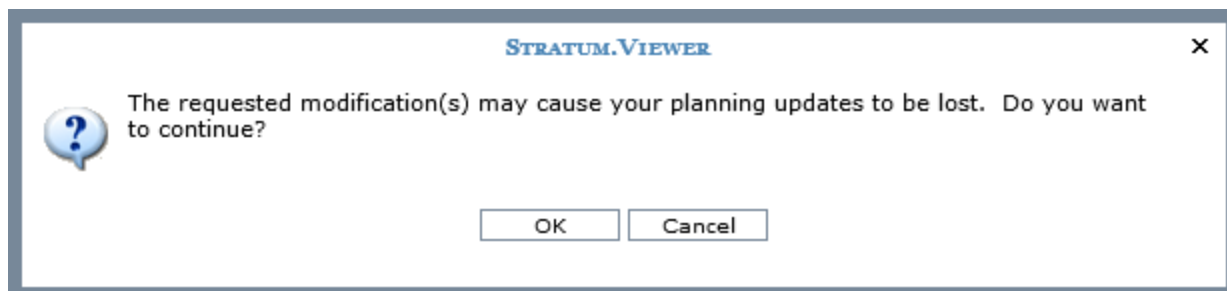
Impact of View and Browser Modifications on Pending Planning Updates

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.

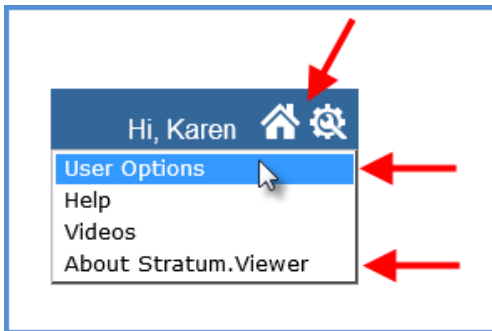


Some view modifications such as changing the view name or performing a Save do not require the grid to be refreshed. If the modification will not refresh the grid, you will not lose unprocessed planning updates and therefore a warning message will not display about the modification.

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, 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 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 >> | | 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 | 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 | | | |
| | 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 >> | 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 | \$5,742.27 | | | | \$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 | \$75,248.00 | \$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 | | |
| | | Nicole Toscano | | | | Dew Drop | | |
| | | Tip Top | | | | | | |
| ▼ 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.

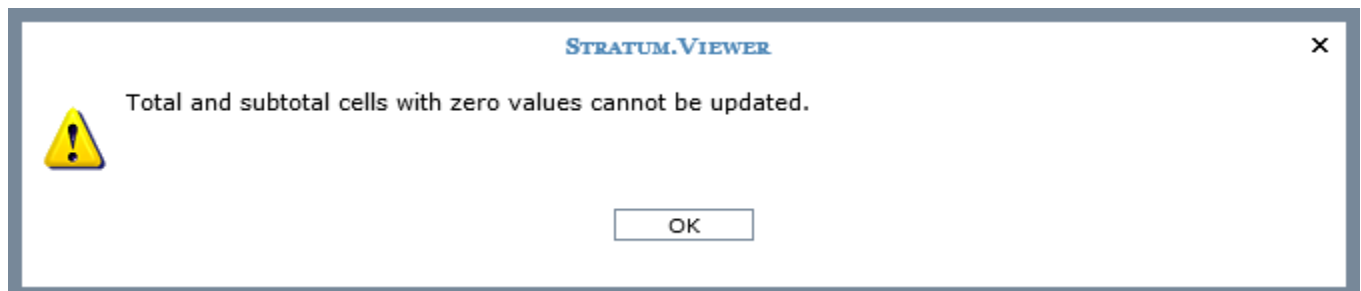
Why Can't I Update Zero Values in Views?

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 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 |
| | | | | |
| | Peach Slcs LS 16 oz BR* 0A | | | |
| | Pear Slcs LS 12 oz BR* 0A | \$24,022.00 | | \$24,022.00 |
| | Peach Hlvs LS 12 oz BR* 0A | | | |
| | 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.

OK

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 | 2013 | |
| 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 | | | | |
| | | Peach Slcs LS 16 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.

OK

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 |

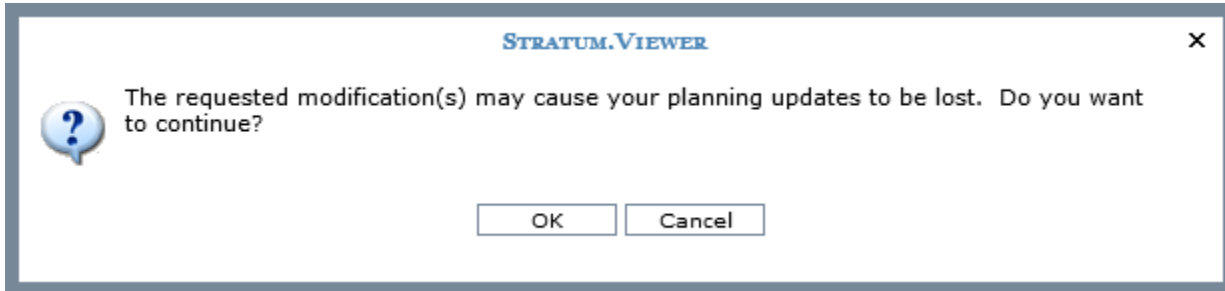
Why Does a Lock Icon Show Next to Measure Items in Planning Views?

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?

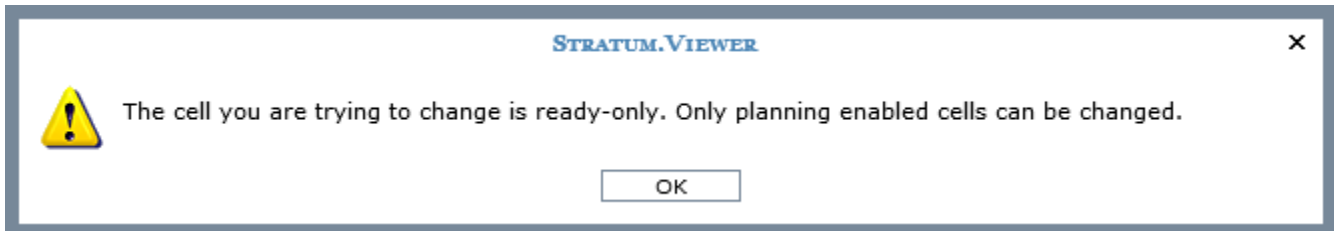
Pending planning updates may be lost if you make modifications in your view, for example, if you drill down or up in the view such that the grid refreshes. You should submit the changes for processing in order to retain them to prevent the changes from being lost. See also [Impact of View and Browser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

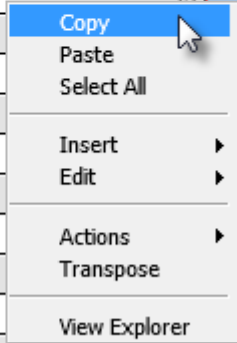
The following message will display when you right-click in the view interface and choose Paste without having first actively clicked on a specific cell in the grid. Right-click in a specific cell, and then choose Paste in order to proceed with the paste.



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.

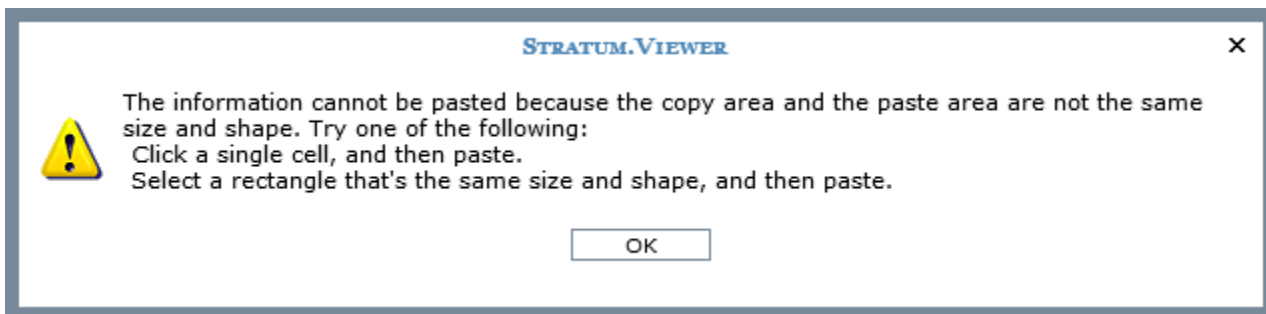
| <u>Year</u> | <u>Months</u> | Budget Units Working | Actual Sales Units | Actual Sales Amount |
|--------------------|---------------|-------------------------|--------------------------|---------------------------|
| 2014 | January | 92 | 89 | \$3,883 |
| | February | 161 | 157 | \$6,780 |
| | March | 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.

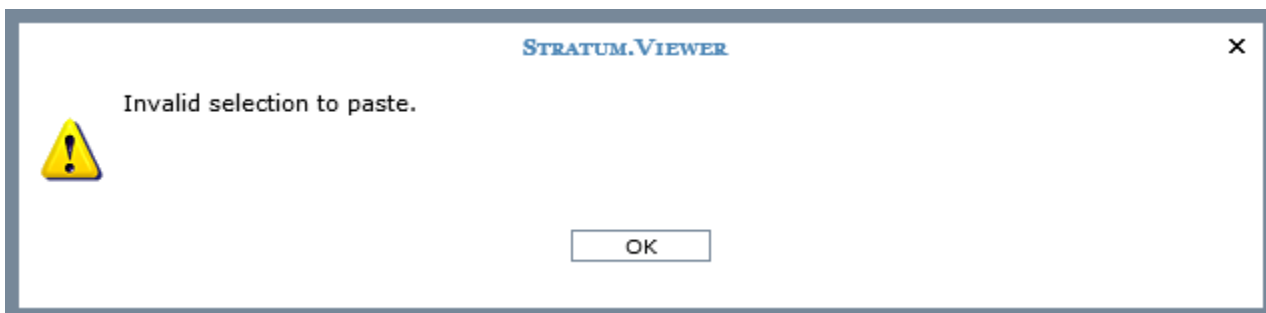
| <u>Year</u> | <u>Months</u> | Budget Units Working | Actual Sales Units | Actual Sales Amount |
|--------------------|---------------|-------------------------|--------------------------|---------------------------|
| 2014 | January | 92 | 89 | \$3,883 |
| | | 161 | 157 | \$6,780 |
| | | 21 | 20 | \$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 | \$7,113 |
| | February | 12 | 12 | \$500 | 24 | 23 | \$900 |
| | March | 30 | 29 | \$1,240 | 59 | 57 | \$2,480 |
| | April | | | | | | |
| | May | 117 | 142 | \$4,990 | 234 | 284 | \$9,960 |
| | June | 176 | 74 | \$2,399 | 353 | 147 | \$4,797 |
| | July | 13 | 166 | \$5,189 | 27 | 331 | \$10,377 |
| | August | | | \$2,243 | 110 | 153 | \$4,413 |
| | September | | | \$14,010 | 637 | 773 | \$28,027 |
| | October | | | | | | |
| | November | | | | 5 | | |
| | December | | | | (7) | | |
| Grand Total | | | | \$34,138 | 1,610 | 1,933 | \$68,210 |

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 | \$7,113 |
| | February | 12 | 12 | \$500 | 24 | 23 | \$900 |
| | March | 30 | 29 | \$1,240 | 59 | 57 | \$2,480 |
| | April | | | | | | |
| | May | 117 | 142 | \$4,990 | 234 | 284 | \$9,960 |
| | June | 176 | 74 | \$2,399 | 353 | 147 | \$4,797 |
| | July | 13 | 166 | \$5,189 | 27 | 331 | \$10,377 |
| | August | 55 | 77 | \$2,243 | 110 | 153 | \$4,413 |
| | September | 319 | 386 | \$14,010 | 637 | 773 | \$28,027 |
| | October | | | | | | |
| | November | 3 | | | 5 | | |
| | December | (3) | | | (7) | | |
| Grand Total | | 805 | 966 | \$34,138 | 1,610 | 1,933 | \$68,210 |

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 |

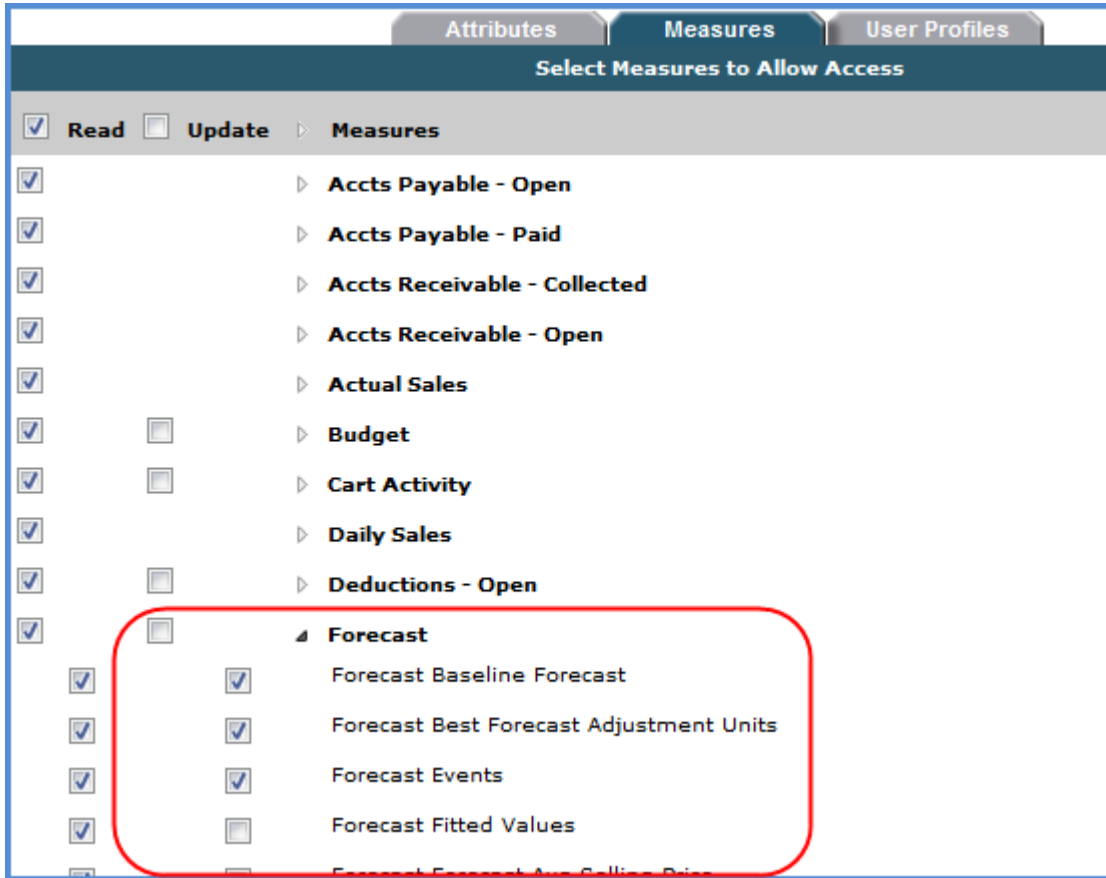
- Copy
- Paste
- Select All
- Insert
- Edit
- Actions
- Transpose
- View Explorer

| | 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.

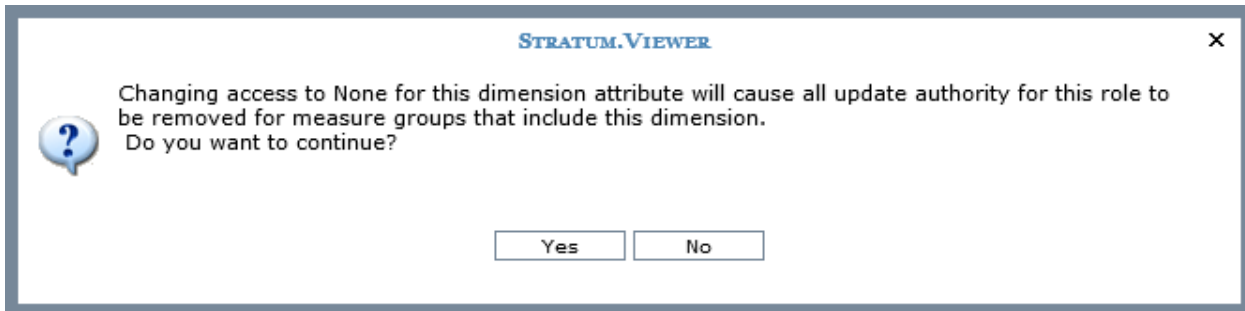
In this example role, the checkboxes for Forecast are enabled, and Update has been selected for a few Forecast measures.



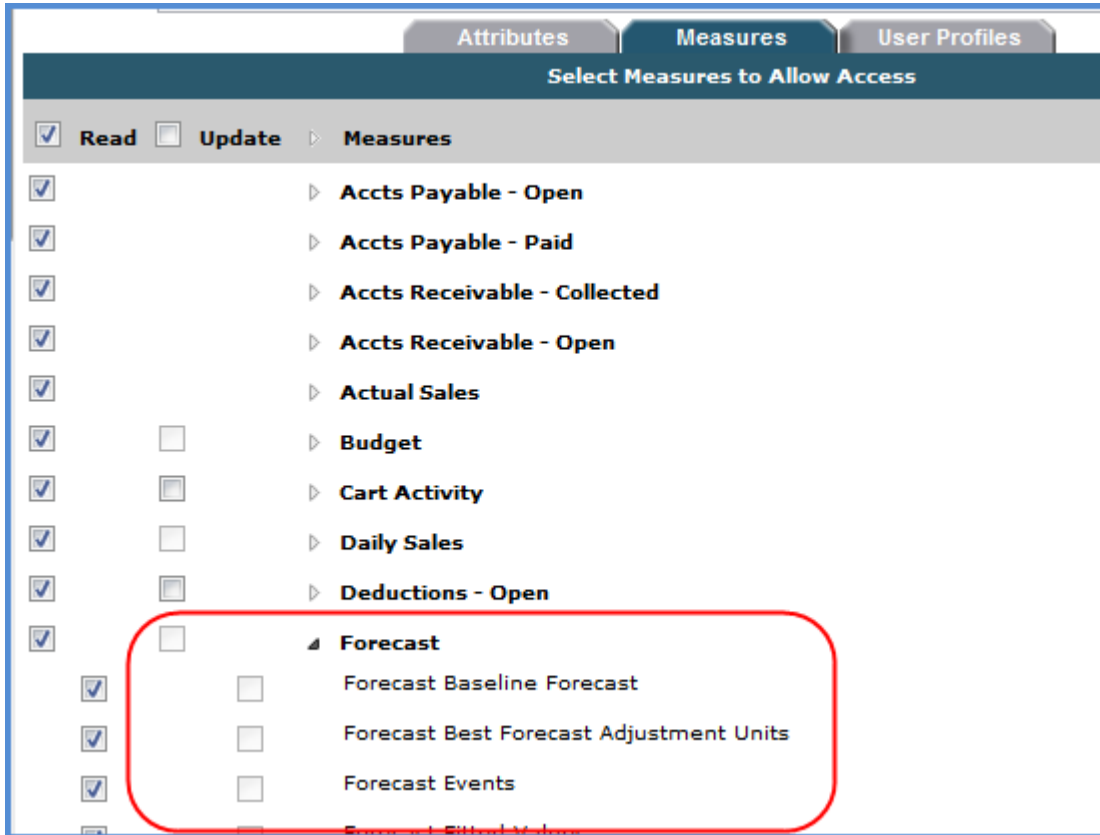
The next image shows an edit being made to a dimension attribute for the role. The Access drop-down list for Company Value is set to None. Update authority for the role will be removed for all measure groups that include the Company dimension. Update checkboxes for them will be disabled.

| 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.



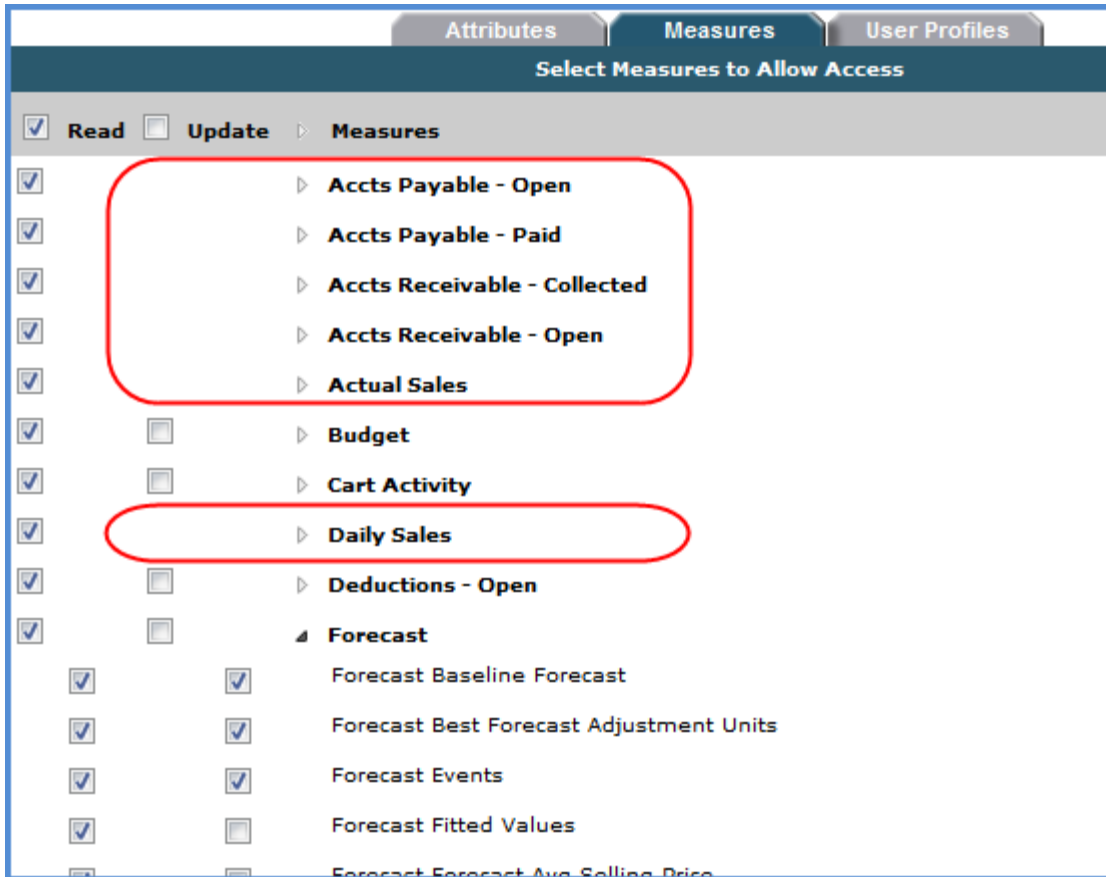
Why isn't there a Paste Option on the Grid Pop-up Menu?

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 has been enabled.

The circled Categories (measure groups) in the following example are Categories that were not Update Enabled in Stratum.Connector. 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.

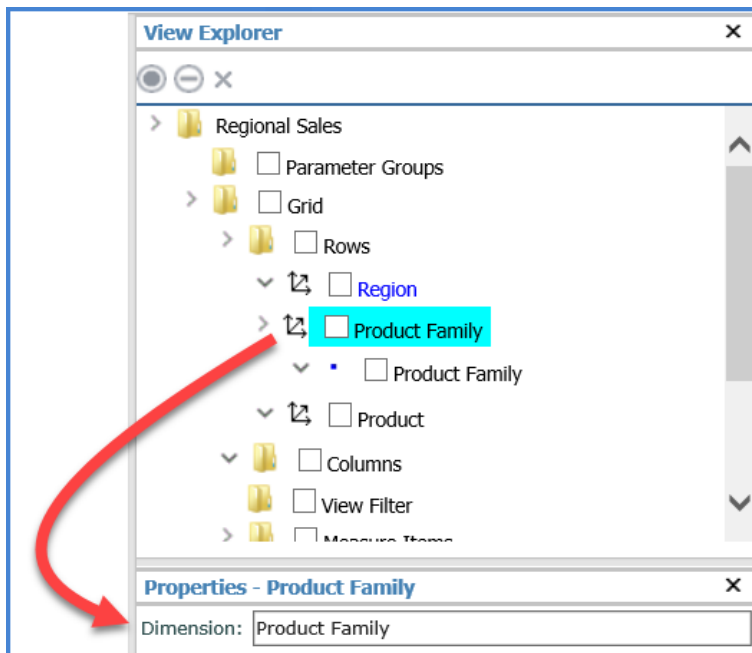
Definitions

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.

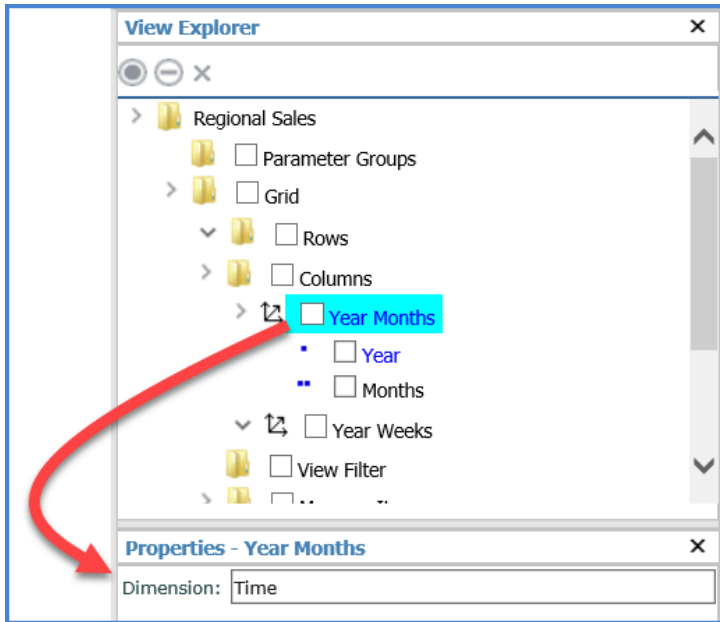
Dimension with Single Hierarchy

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.



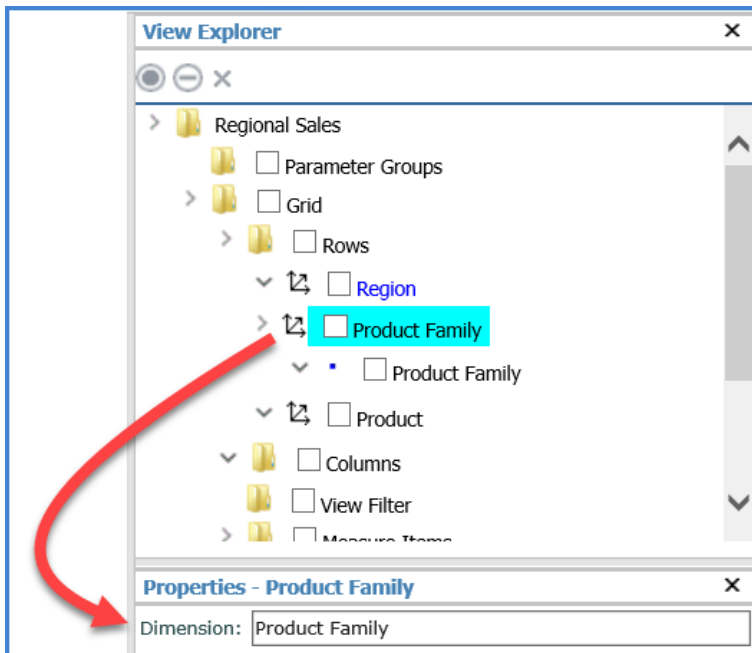
Dimension with Multiple Hierarchies

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

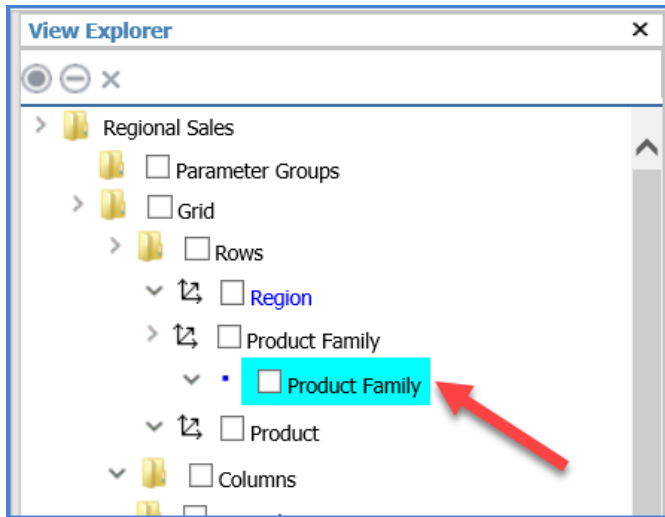
There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Hierarchies belong to dimensions and contain at least one level, which in turn contain members. You can see an example of this structure in view explorer. In the following example, there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

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 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.

