Working with Roles
Stratum.Viewer 7

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Definitions

- Attribute
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- Measure
- Member
- User Profile
- User Profile Group

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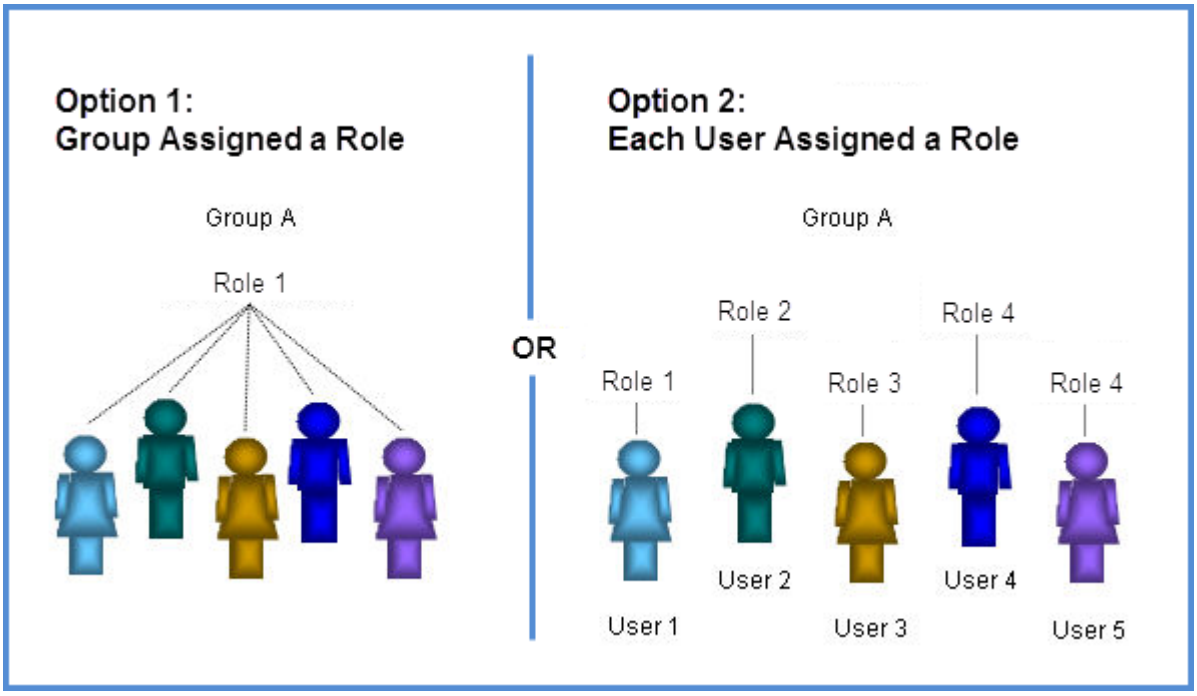
Access to Roles

Only security administrators can work with roles.

Introduction to Roles

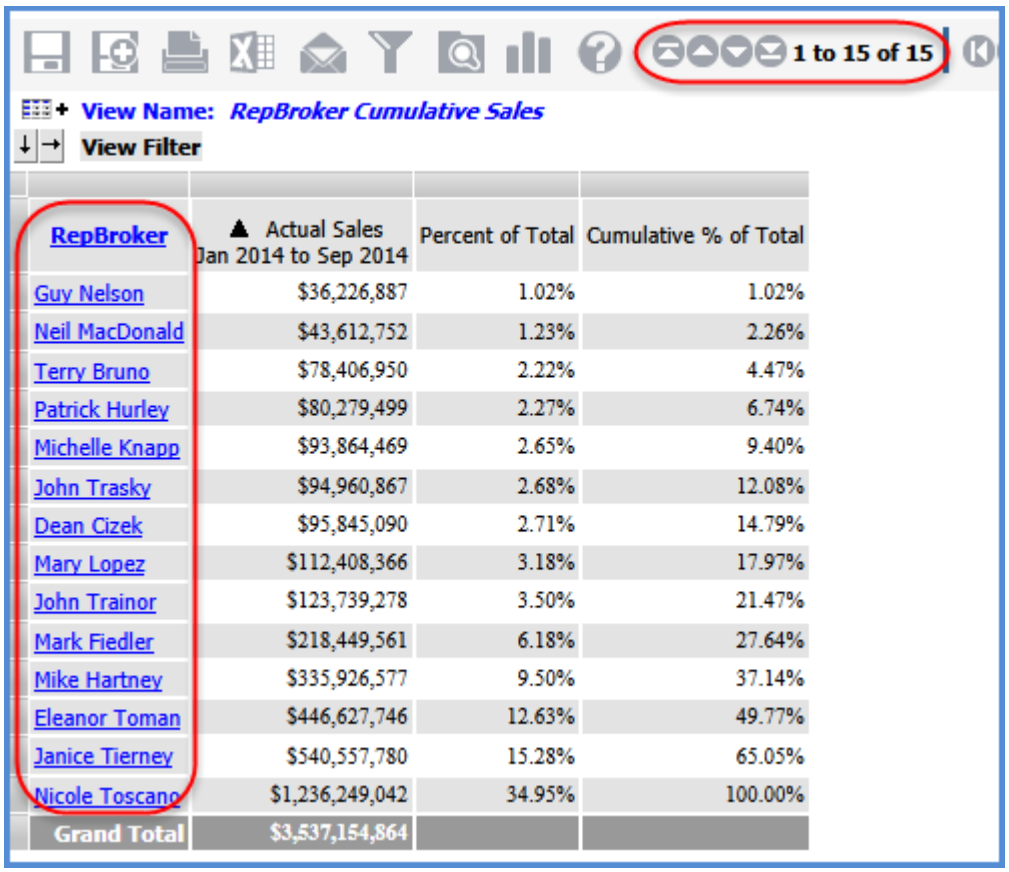
Administrators use roles in combination with user profiles and user profile groups to give users access to Stratum.Viewer. Roles control which measures and dimension members a user can see while running views or accessing any window that shows such objects, for example, the Select Members and Add Measure Items windows. If you have users who need access to all data, roles allowing all access can be set up. If you have users who only need to access a limited range of data, for example only Actual Sales data or only data for a specific sales representative or region, then roles allowing that limited access can be set up. Roles also are used to give users update authority measures. Also, settings in Role Maintenance and Measure Maintenance impact the ability of users to edit data in their planning views.

Roles are flexible. You can assign a single role to an entire group of users or assign each user in a group a role. The second option still gives users access to the same view groups, but the data that each user sees in views is controlled by their role permissions.



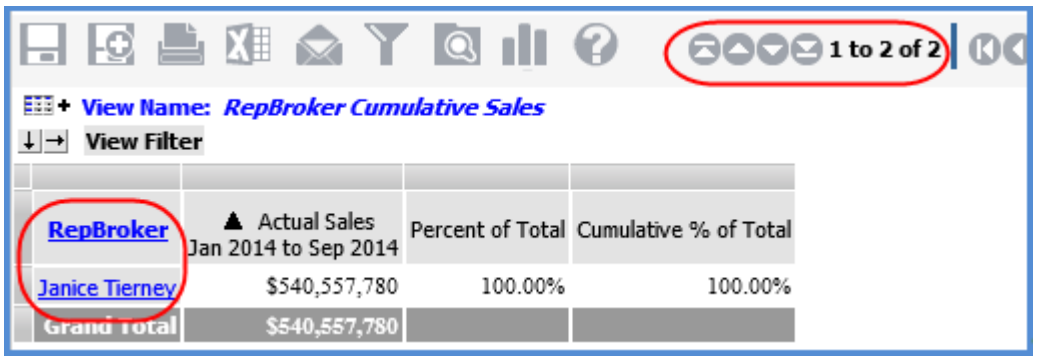
The next page shows an example of the second option.

One user from Group A has a role that gives access to all RepBroker members. All members display when that user runs the following view.



RepBroker	Actual Sales Jan 2014 to Sep 2014	Percent of Total	Cumulative % of Total
Guy Nelson	$36,226,887	1.02%	1.02%
Neil MacDonald	$43,612,752	1.23%	2.26%
Terry Bruno	$78,406,950	2.22%	4.47%
Patrick Hurley	$80,279,499	2.27%	6.74%
Michelle Knapp	$93,864,469	2.65%	9.40%
John Trasky	$94,960,867	2.68%	12.08%
Dean Cizek	$95,845,090	2.71%	14.79%
Mary Lopez	$112,408,366	3.18%	17.97%
John Trainor	$123,739,278	3.50%	21.47%
Mark Fiedler	$218,449,561	6.18%	27.64%
Mike Hartney	$335,926,577	9.50%	37.14%
Eleanor Toman	$446,627,746	12.63%	49.77%
Janice Tierney	$540,557,780	15.28%	65.05%
Nicole Toscano	$1,236,249,042	34.95%	100.00%
Grand Total	$3,537,154,864		

Another user from Group A has a role that gives access to only one RepBroker members, which means only that member displays when this user runs the same view as the previous user.



RepBroker	Actual Sales Jan 2014 to Sep 2014	Percent of Total	Cumulative % of Total
Janice Tierney	$540,557,780	100.00%	100.00%
Grand Total	$540,557,780		

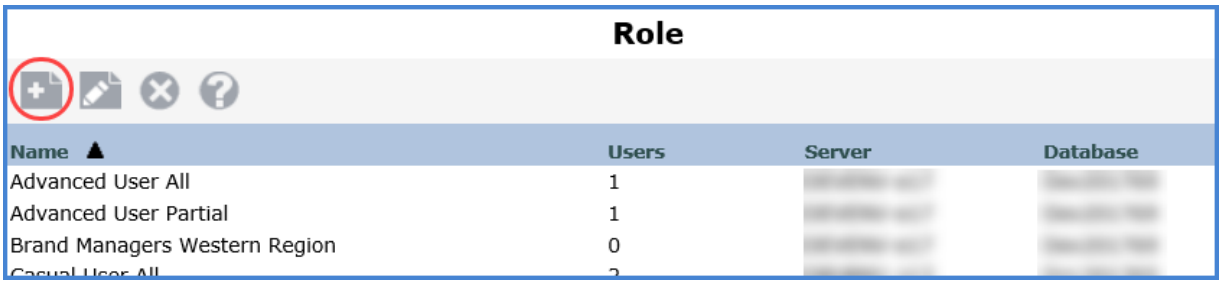
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Quick Start - Add a Role

Here are the key steps for adding a role. See also Quick Start - Give Users Access to Stratum.Viewer.

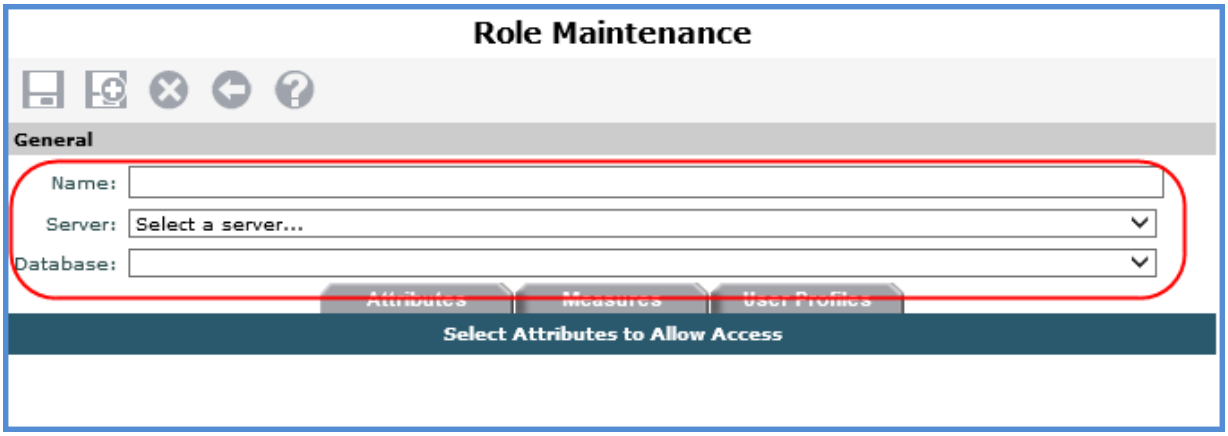
1 Click Manage Things then Role in the main menu of the top panel of Stratum.

2 Click New in the Role list window to access the Role Maintenance window.



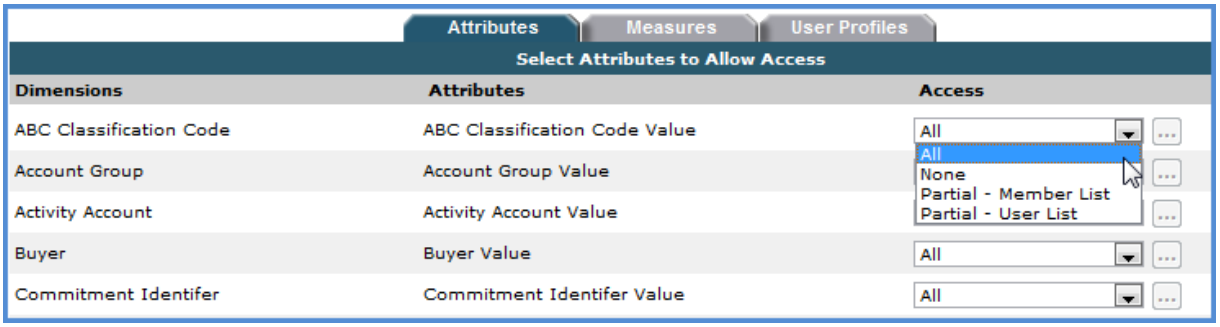
3 Specify a name, the server for the database to be associated with the role, and the database.

The Attributes and Measures tabs will be populated with the dimensions and measures from the selected database.



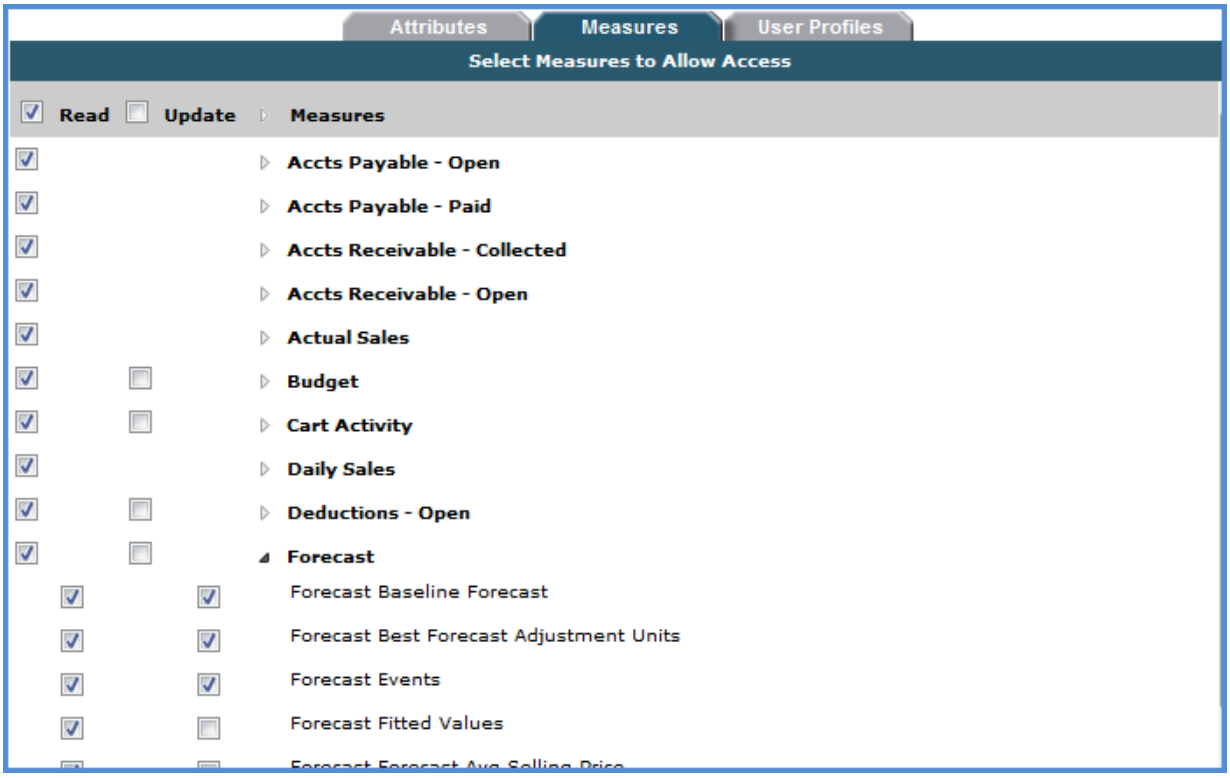
4 Use the Attributes tab to determine the dimension members that users with this role will be able to access.

You can give access to all, none, or some members (using a member list or user list).



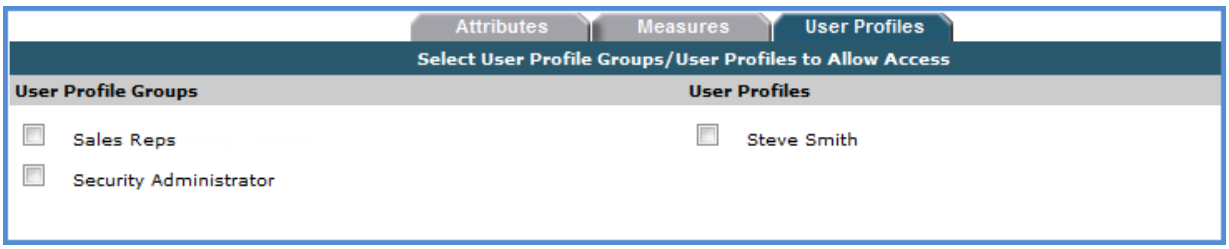
5 Use the Measures tab to determine the measures that users with this role will be able to access. Use the Read and Update* checkboxes to set up read access and update authority for measures.

***Note:** Selecting the Update checkbox for a measure is one of the steps required for users of Stratum.Viewer Planning to be able to edit data in planning views. See the Planning section of online help for additional Planning setup steps.



6 Use the User Profiles tab to select a user profile or user profile group for the role.

- If you do not select a user profile or group for the role or none are available to select, you can save the role as is. The role will not be actively used in Stratum.Viewer until you attach a user profile or group, which can be done via the Role Maintenance, User Profile Maintenance, or User Profile Group Maintenance window.
- See also Relationship between User Profiles, User Profile Groups, and Roles.



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7 Save the role.

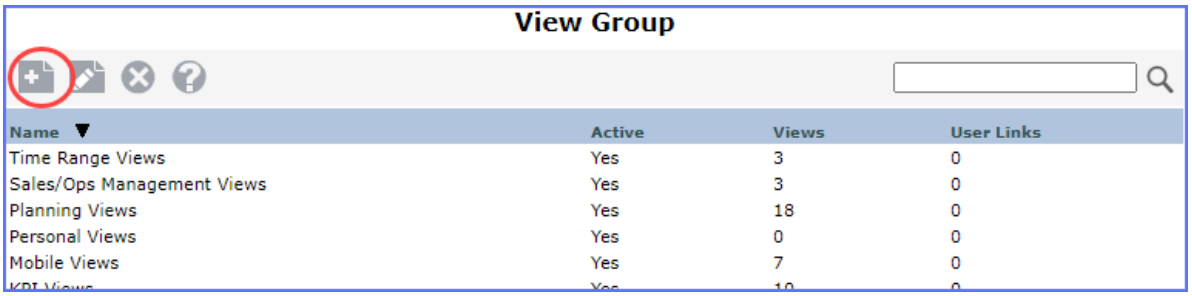
Quick Start - Give Users Access to Stratum.Viewer

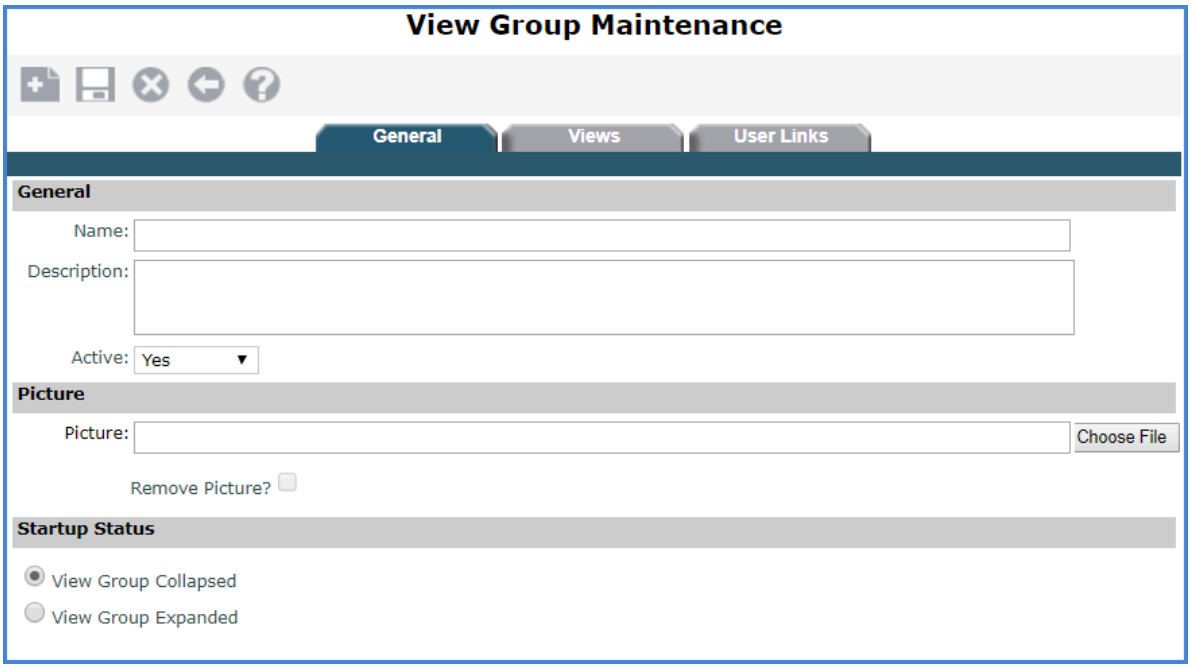
Anyone that needs access to Stratum.Viewer will need to have a role, user profile, and user profile group plus have at least one view group assigned to their user profile group.

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

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

- Skip this step if view groups that are suitable for the new user already exist.
- Access the View Group list window by clicking Manage Things then View Group from the main menu in the top panel of Stratum.
- Click New to open the View Group Maintenance window and set up the group.

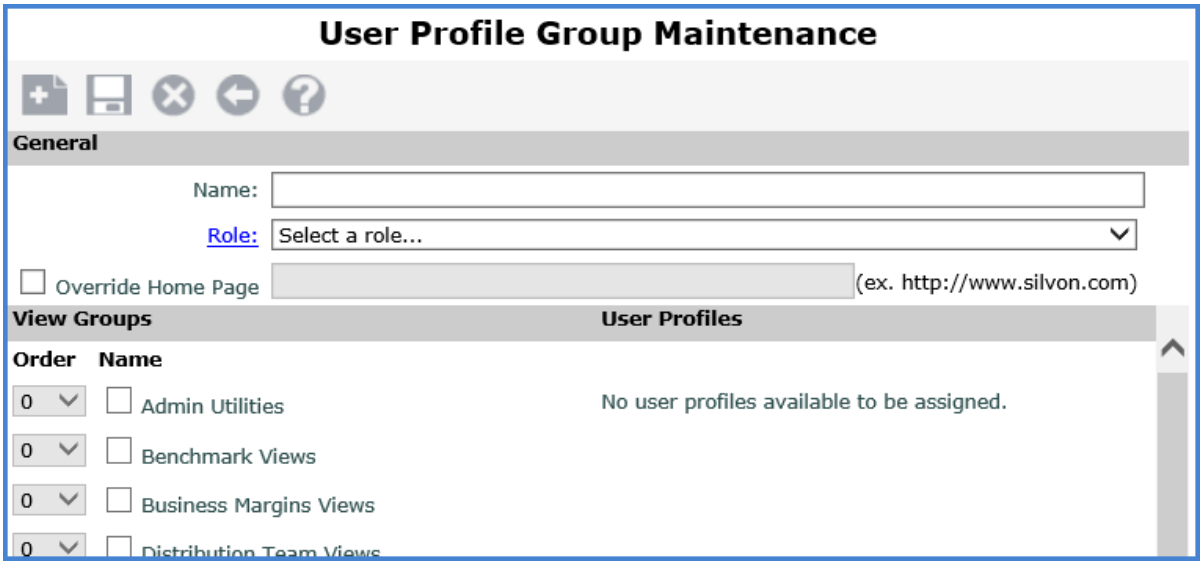




2 Add a user profile group using the User Profile Group Maintenance window.

- Skip this step if a group that's suitable for the new user already exists.
- Access the User Profile Group list window by clicking Manage Things then User Profile Group from the main menu in the top panel of Stratum.
- Click New to open the User Profile Group Maintenance window and set up the group.
- If you want users who belong to this group to share the same role and there is an existing role that suits the group needs, you can select the role while working in the User Profile Group Maintenance window and skip Step 3.
- Attach at least one view group to the user profile group.

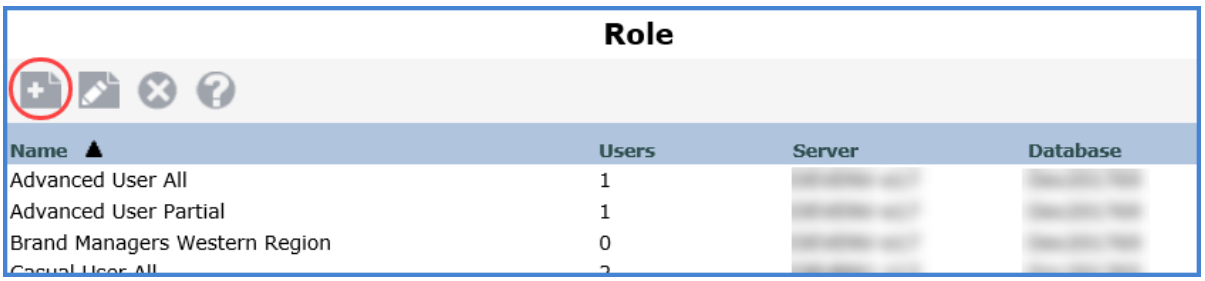


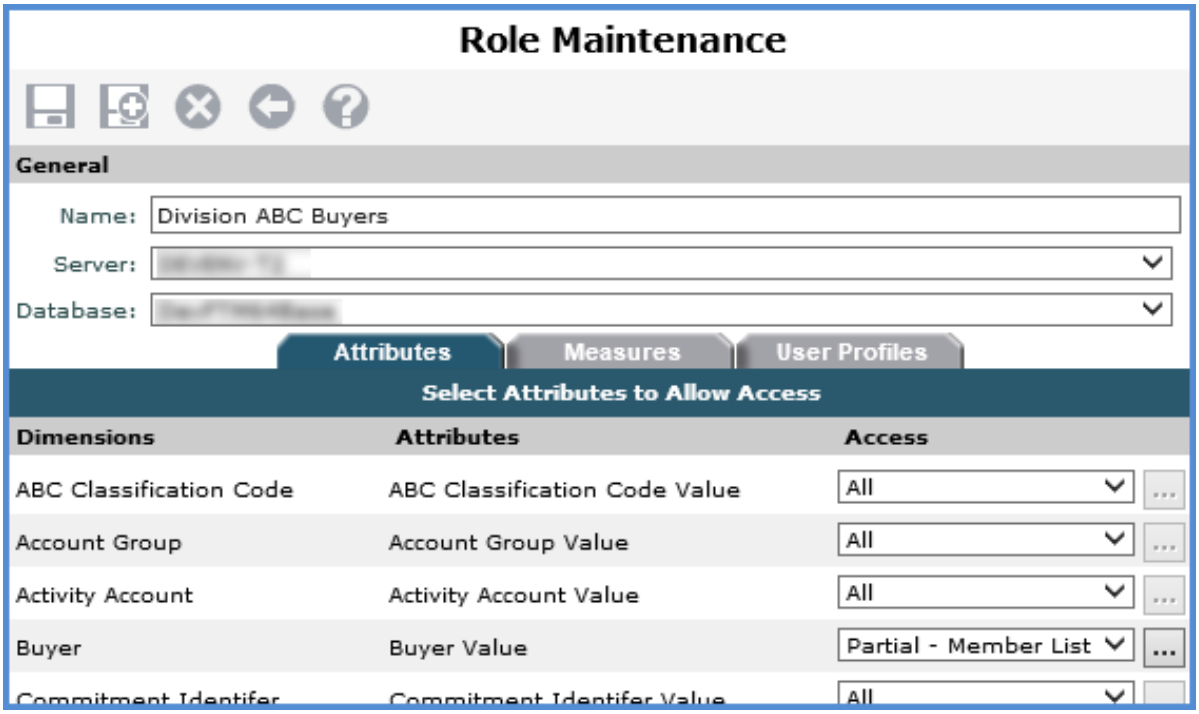


3 Add a role using the Role Maintenance window.

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

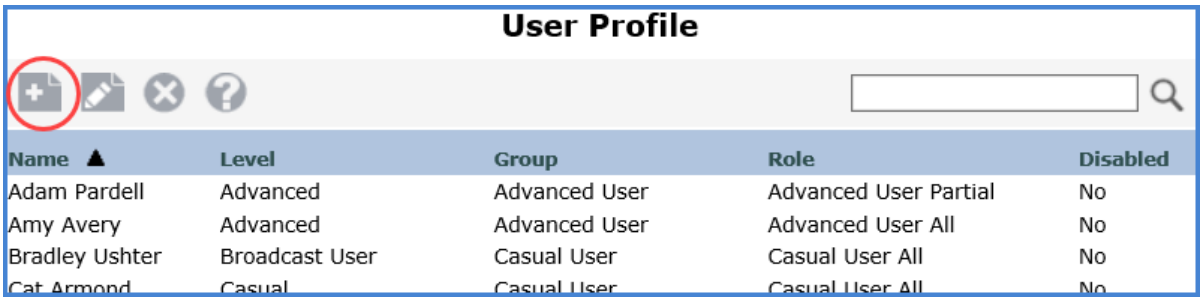
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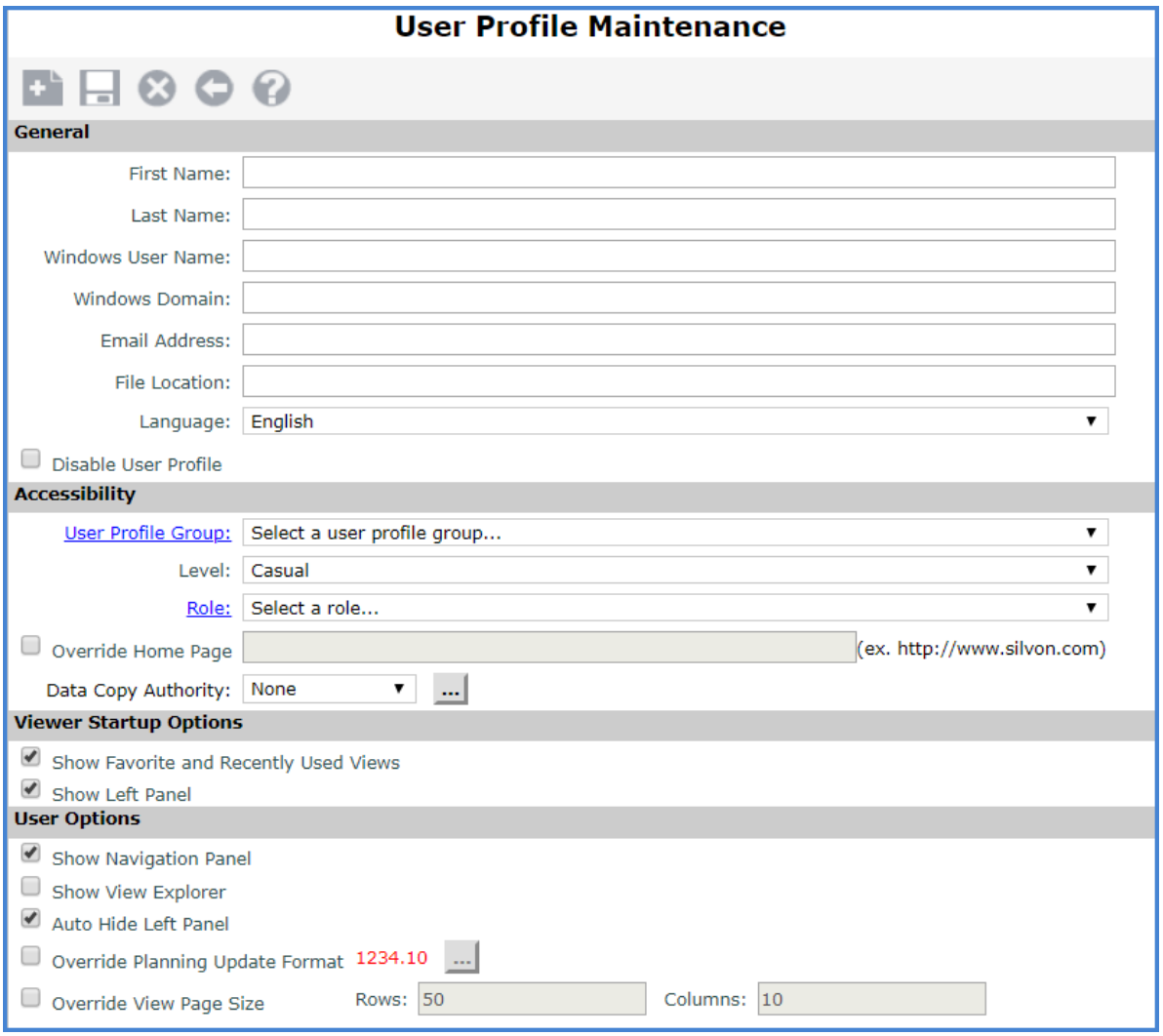




4 Add the new user's user profile using the User Profile Maintenance window.

- Access the User Profile list window by clicking Manage Things then User Profile from the main menu in the top panel of Stratum.
- Click New if you still need to set up the user's profile. If the profile already exists, click its name and then click Edit.
- In the Accessibility section of the User Profile Maintenance window:
  - Select the user profile group that you added in Step 2.
  - Select a role if the selected user profile group doesn't have a role assigned to it. Otherwise, you don't need to select a role.




User Profile Maintenance
General
First Name:
Last Name:
Windows User Name:
Windows Domain:
Email Address:
File Location:
Language:
English
Disable User Profile
Accessibility
User Profile Group:
Select a user profile group...
Level:
Casual
Role:
Select a role...
Override Home Page
(ex. http://www.silvon.com)
Data Copy Authority:
None
...
Viewer Startup Options
Show Favorite and Recently Used Views
Show Left Panel
User Options
Show Navigation Panel
Show View Explorer
Auto Hide Left Panel
Override Planning Update Format
1234.10
...
Override View Page Size
Rows:
50
Columns:
10

Tasks

Add a Role

1. Click Manage Things then Role from the main menu in the top panel of Stratum.

2. Click New  in the Role list window.

3. Use the General section of the Role Maintenance window to:

   - Specify a name.
   - Select the server for the database to be associated with the role.
   - Select the database to be associated with the role.

4. Use the Attributes tab to determine which dimension members that users with this role will be able to access. Use one of the following options in the drop-down list next to a dimension for any dimensions to which you want to limit access. Any dimension left set to All will be one to which role users will have full access.

   - **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.

Note: 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.

5. Use the Measures tab to determine the measures to which users with this role will have read access and update authority.

   - 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.
   - 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 if any dimensions related to the measures have their attributes access set to None on the Attributes tab.

Note: Selecting the Update checkbox for a measure is one of the steps required for users of Stratum.Viewer Planning to be able to edit data in planning views. See the Planning section of online help for additional Planning setup steps.

6. Use the User Profiles tab to attach the role to a user profile or user profile group.

    - If you select a user profile group for 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 or those where the user profiles don't have individual roles 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 the role as is and attach a user profile or group at a later time via the Role Maintenance, User Profile Maintenance, or User Profile Group Maintenance 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.

7. Save  the role.

Delete a Role

1. Click Manage Things then Role from the main menu in the top panel of Stratum.

2. In the Role list window, select the role you want to delete and click Delete . You will be asked to confirm the deletion.

Note: If the role is attached to a user profile or user profile group, and you proceed with the deletion, then that user profile or user profile 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.

Detach a Role from a User Profile or User Profile Group

1. Click Manage Things then Role from the main menu in the top panel of Stratum.

2. Double-click the role in the Role list window.

3. Use the User Profiles tab in the Role Maintenance window to deselect the user profile or group assigned to the role.

4. Save  the changes.

Note: Detaching a role results in the user(s) with the impacted user profile or user profile group no longer being able to access Stratum.Viewer. You will need to assign a different role to the user profile or user profile group. Also, if the steps above leave the role without any user profile or group, you will be warned that the role definition will not be complete until one is selected. You can save the role in that state, but it will not be actively used in Stratum.Viewer.

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Edit a Role

1. Click Manage Things then Role from the main menu in the top panel of Stratum.

2. Double-click the role in the Role list window.

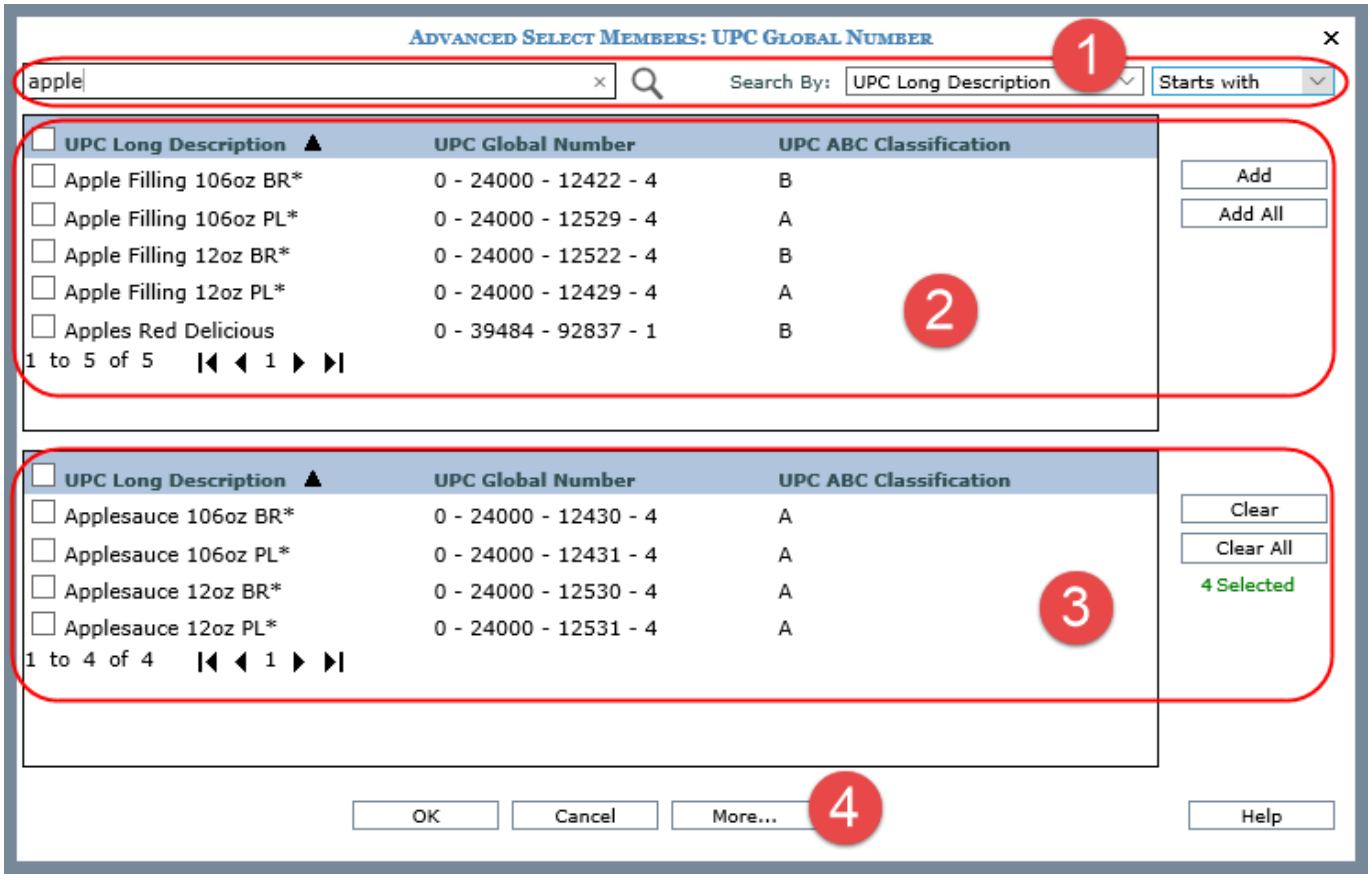
3. Edit properties on the Attributes, Measures, or User Profiles tab of the Role Maintenance window.

   - Use the Browse button ... next to a dimension on the Attributes tab if you need to edit an existing member list or user list filter on that dimension.
   - If during your edits, you detach a user profile or user profile group from the role, the impacted user(s) will no longer be able to access Stratum.Viewer. You will need to assign a different role to the user profile or user profile group of the user(s).
   - If edits leave the role without any user profile or group, you will be warned that the role definition will not be complete until one is selected. You can save the role in that state, but it will not be actively used in Stratum.Viewer.

4. Save the changes.

Windows

Advanced Select Members Window



1

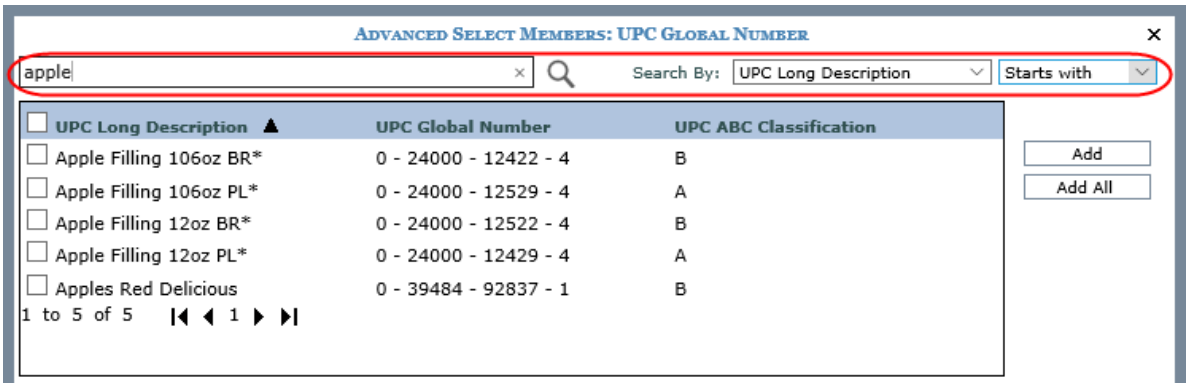
Use the search properties to specify the criteria and the parameters by which to search for members to be used in the member list. That list can be used as a level filter, to create a user list, or to help build an expression.

Note: The window also is used when administrators set up roles.

Click the search icon after you specify your search properties:

- Enter a value in the search field. Multiple values can be entered by separating them with a semicolon. If the field is left blank, the available list displays all members for the active level.
- Optionally use the Search By drop-down lists. The first list is to select the attribute relationship to perform the search on. The other list lets you choose whether you want your search to contain, not contain, start with, be equal to, not equal to, greater than, or less than the value(s) specified in the search.

In the following example, we searched for UPC long descriptions starting with “apple” and 5 items were retrieved.



2

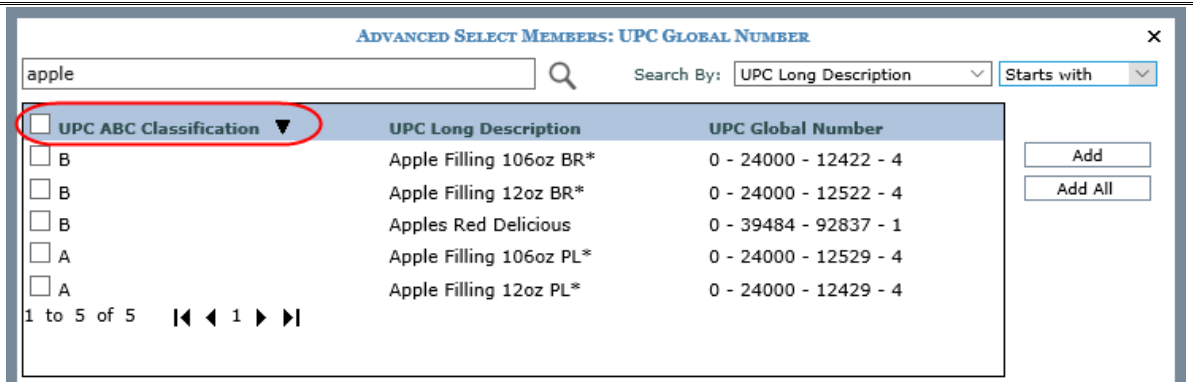
Available Selection list – The list area displays members returned by your search. Click checkboxes next to members then click Add to move the selected members to the bottom portion of the window. Click OK when you are done making various member selections.

Other options and tips:

- Selecting members in the top portion of the window then clicking OK will add the selected members to a filter and close the window.
- Click the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).
- Click Add All to add all of the available members, from all pages, to the selected list in the bottom portion of the window.

Columns in this area are sort and drag/drop enabled. In the following example, we clicked the UPC ABC Classification column and dragged it to the first position. We also clicked the Sort icon and changed the sort from ascending to descending.

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Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

3

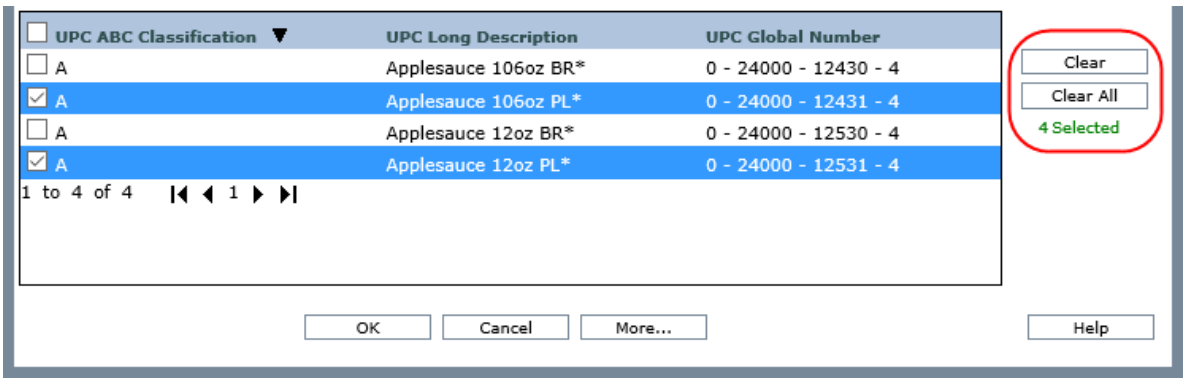
Selected list - displays the members selected for the member list. A count under the Clear All button indicates how many members are included in the member list filter.

To clear members, click checkboxes next to members you want to remove from the filter and then click Clear when you are done making selections.

Other options and tips:

- Use the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).
- Click Clear All to clear all of the members, from all pages of the selected list.

In the following example, there are four items in the filter and two have been selected with the intention of clearing them. After the Clear button is clicked, the filter will contain only two items.



Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

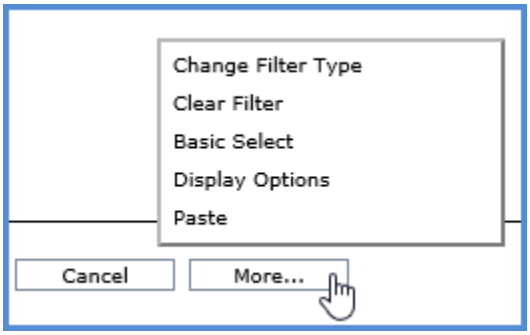
Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

4

More… -- Click the More button for additional features:

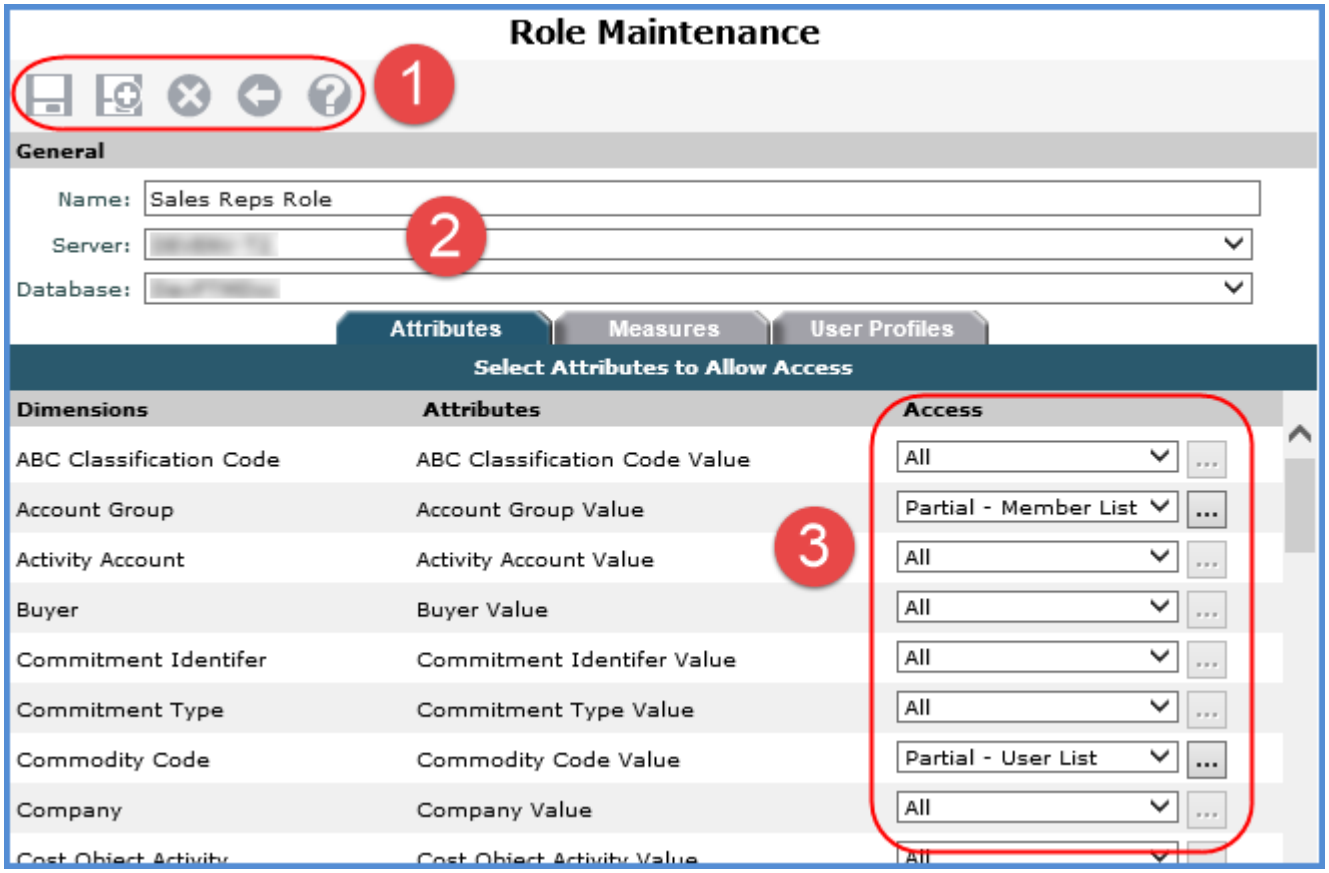
- **Change Filter Type** –Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).
- **Clear Filter** – Click as a shortcut to clearing the filter from the level.

- **Basic Select** – Click to access the Select Members window. This option may not display depending on administrative settings for the level. Administrators determine which version(s) of the window are available by dimension.
- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Advanced Select Members window.
- **Paste** – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building. Valid values identified in the Paste Members window will display in the bottom half of the Advanced Select Members window when you are done identifying members for your filter via the Paste Members window.



Role Maintenance Window

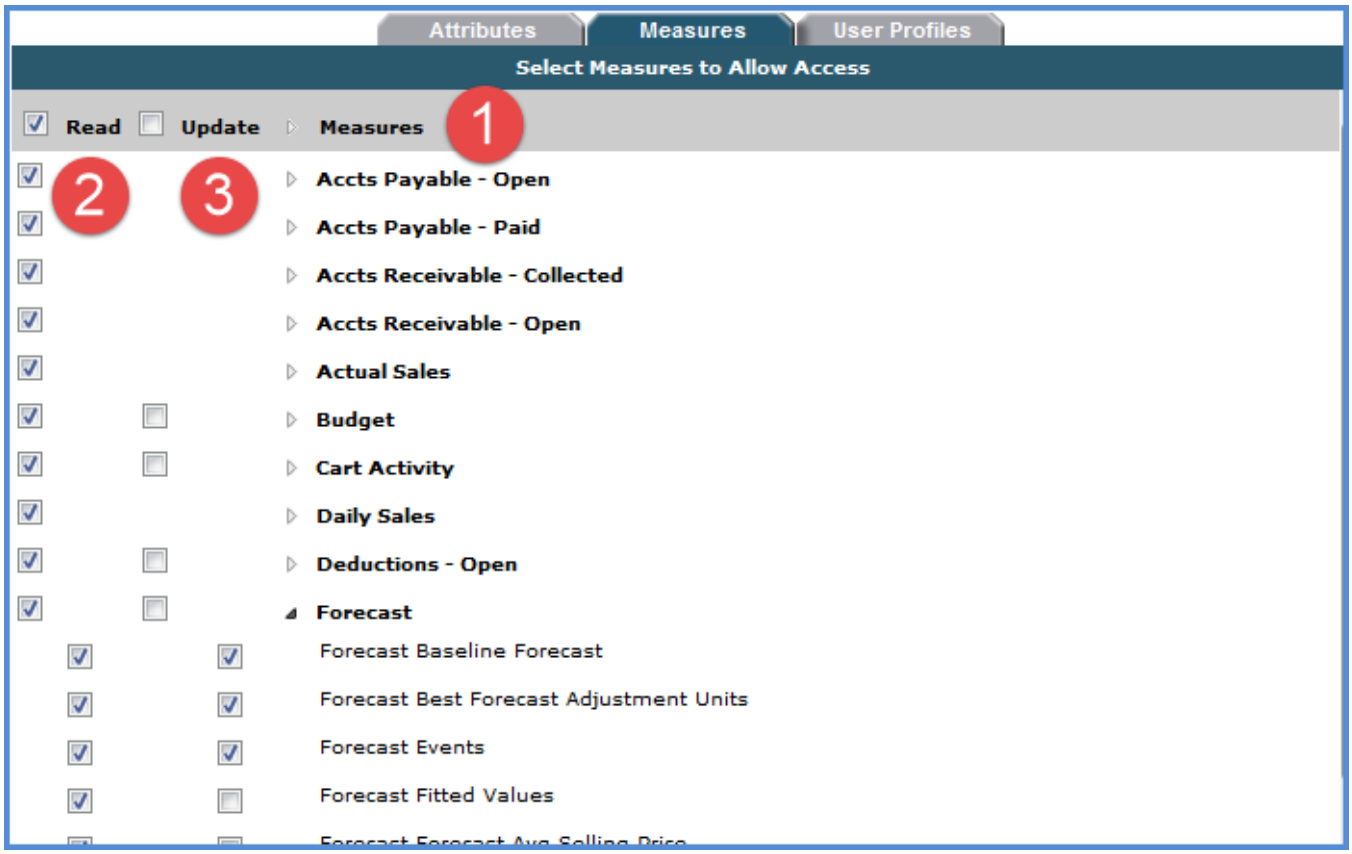
General Section and Attributes Tab



1	**Toolbar** - • **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 users of that user profile or group will no longer be able to log into the application. You will need to assign them to another role if you want them to remain active users of the application. • **Exit**  - Click to exit this window and return to the Role window. • **Help**  - Click to open help that is specific to working with roles.
2	**General** - Use this section to set up or change basic role properties. • **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.

3	**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.
	• **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.
	***Note**: The Time dimension is not included.
	• **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.
	  • **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.
	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.

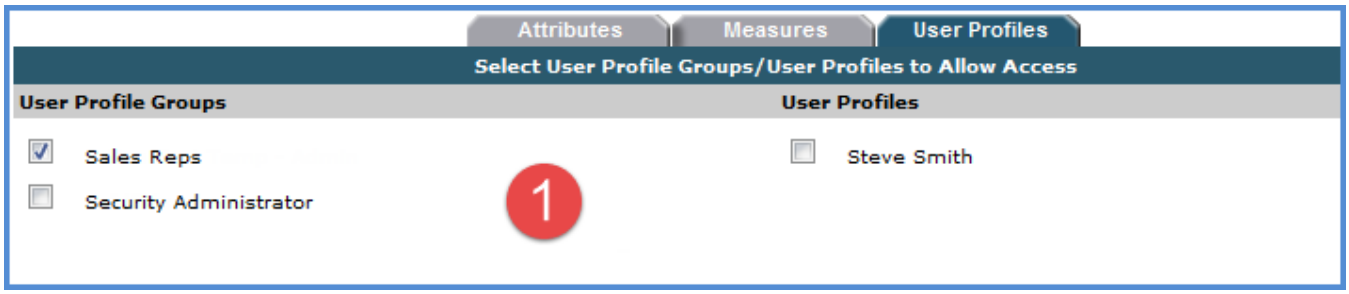
Measures Tab



1	**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. • **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.).
2	**Read** – Select the Read checkbox for measures that users of this role will need to see in views. • 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.).
3	**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. • You can give Update authority to all measures for all Update Enabled* measures using the Update checkbox near the Measures heading.

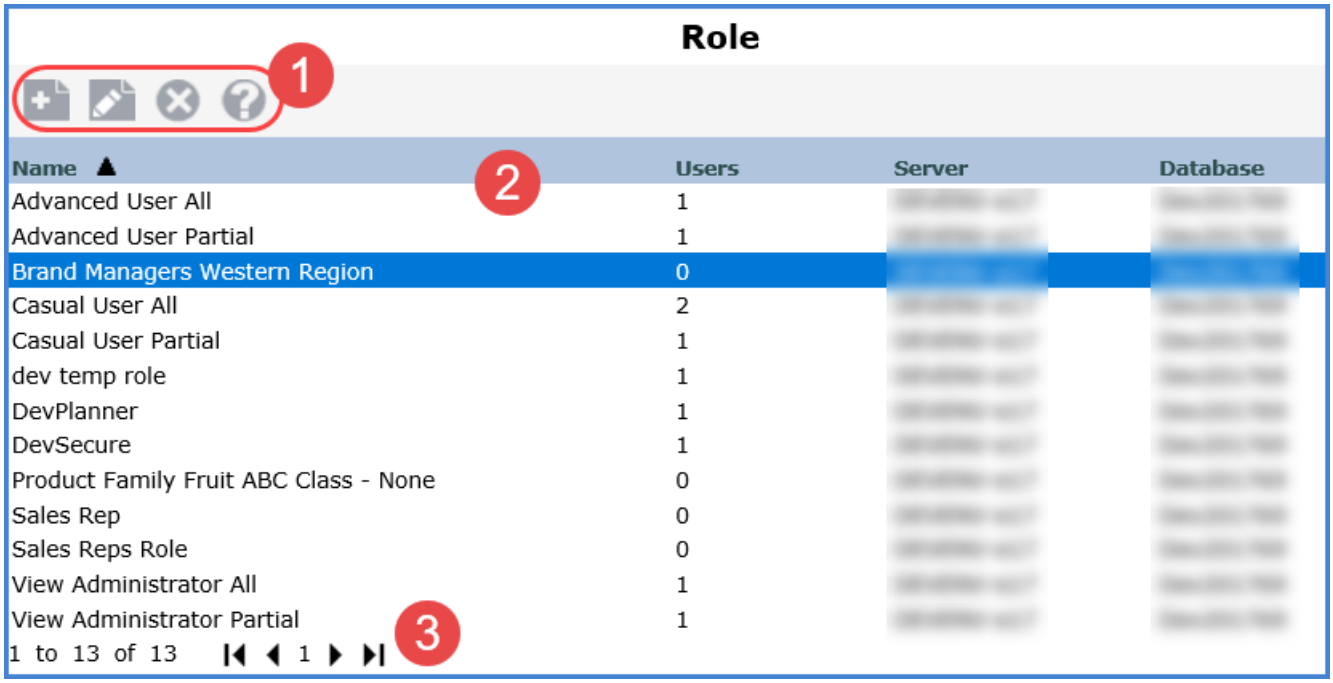
	• You can give Update authority to all measures within a single Update Enabled* Category using the Update checkbox next to the Category name. Update authority can only be given to measures that are Read access enabled. When an Update checkbox is selected, the application automatically selects the corresponding 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



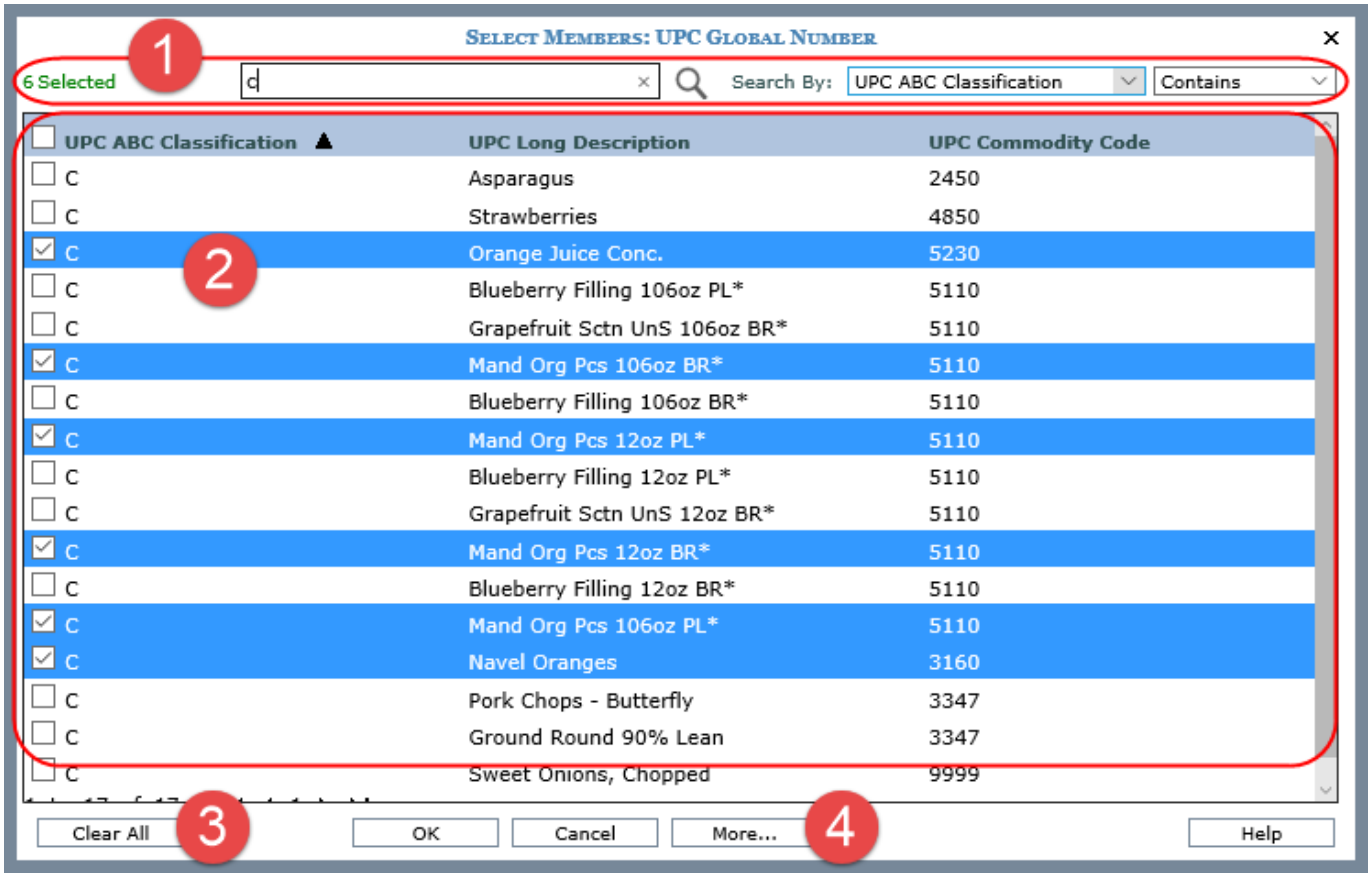
1	**User Profile Groups and User Profiles** - Use this tab to attach the role to a user profile or user profile group or to change the user profile or group. • If you attach a user profile group to the role, all user profiles in the group will have that same role. • Only those user profile groups that 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.

Role List Window

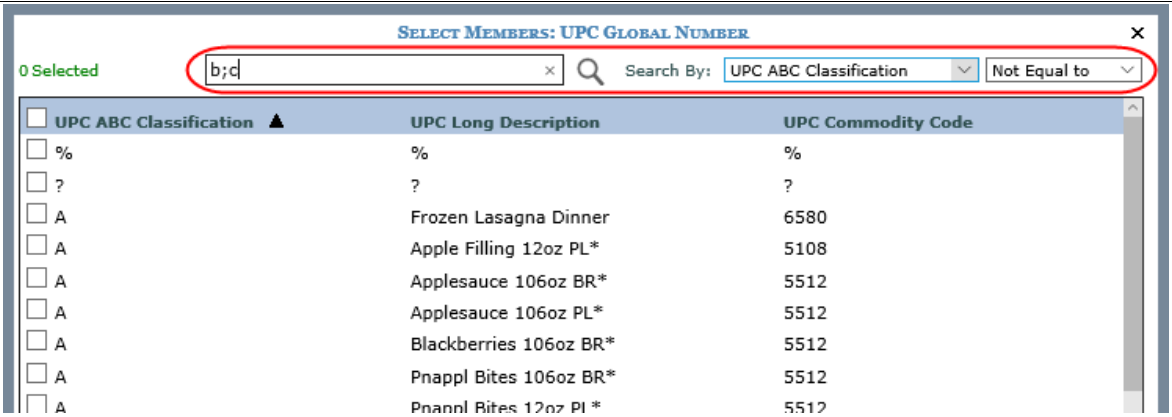


1	**Toolbar** - • **New** - Click to open a blank Role Maintenance window and set up a new role. • **Edit** - Select a role then click Edit to open the role for editing in the Role Maintenance window. • **Delete** - Click a role in the list window and then click the Delete icon to delete the role. You will be prompted to confirm the deletion. If the role is attached to a user profile or user profile group, and you proceed with the deletion, then users of that user profile or group will no longer be able to log into the application. You will need to assign them to another role if you want them to remain active users of the application. • **Help** - Click to open help that is specific to working with roles.
2	**Display Columns** - Sort and drag or drop columns to rearrange the window information. **Selecting Roles** - You can select one role at a time. Double-click a role to open it for editing. Or, select the role and then click Edit or Delete depending on what you need to do with the role.
3	**Paging Controls** - Use the paging arrows and links to move between pages of roles. Controls are active only when there are multiple pages of roles. **Note:** For all windows that display lists (views, user lists, etc), there is a single administrative setting on the Application window that controls how many items display per page in a list.

Select Members Window



1	The 'Selected' count in the upper left corner shows how many members are included in the filter. The count adjusts as you change selections in the window. This window is initially populated with all authorized members for the active level. Make selections from the entire list, or execute a search to narrow down the list. Use the search properties to specify the criteria and the parameters by which to search for members to be used in a member list filter or user list. **Note:** The window is also used when selecting members from the expression window for calculated measure items and when administrators set up roles. Click the search icon after you specify your search properties: • Enter a value in the search field. Multiple values can be entered by separating them with a semicolon. If the field is left blank, the available list displays all members for the active level. • Optionally use the Search By drop-down lists. The first list is to select the attribute relationship to perform the search on. The other list lets you choose whether you want your search to contain, not contain, start with, be equal to, not equal to, greater than, or less than the value(s) specified in the search. In the following example, we searched for UPC ABC Classification not equal to "b or c".



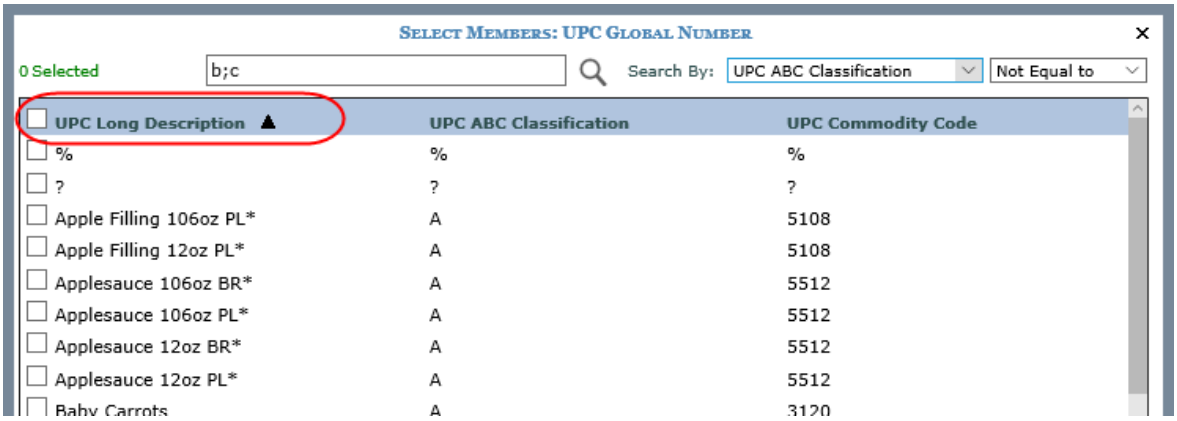
2

Available Selection list – Use this list to select the members to include in a member list filter, expression, etc. Click the checkboxes next to members or click anywhere in member rows to select or deselect members. Click OK when you are done making various selections to apply your filter.

Other options and tips:

- If your search returns only one member, the member will display as selected. At that point, you can click the OK button to close the window and add that member to a filter.
- Selecting members then clicking OK will add the selected members to a filter and close the window.
- Click the checkbox in the heading area to select or deselect all members on all pages in the list at once.
- Use Shift+Click as a shortcut to selecting a range of consecutive members (click the first item, then press Shift key while clicking the last item).

Columns in this area are sort and drag/drop enabled. In the following example, we clicked the UPC Long Description column and dragged it to the first position. We also clicked the Sort icon to perform the sort on that column in ascending order.



Use the paging arrows and links at the bottom of the list to move between pages of members. Selections made on various pages are retained as you move between pages in the list.

Note: For all windows that display lists (views, user lists, etc.), there is a single administrative setting on the Application window that controls the page size.

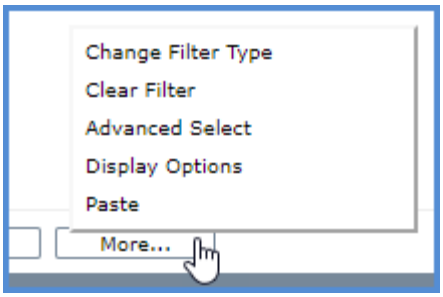
3

Clear All – Click this button to clear all member selections from a filter. The window remains open so you can make new selections.

4

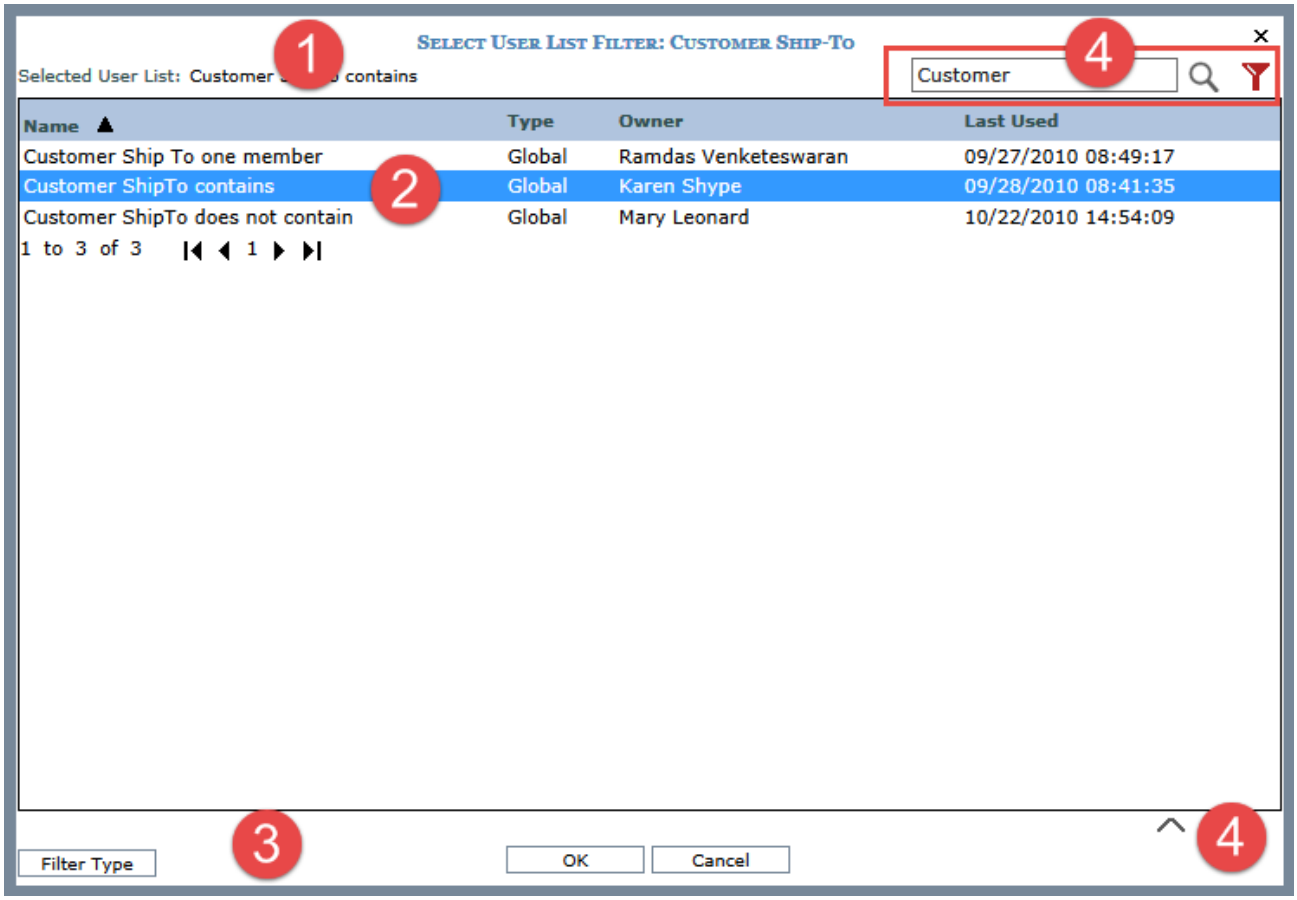
More… -- Click the More button for additional features:

- **Change Filter Type** –Click to access the Select Filter Method window if you need to apply a different type of filter to the level (User List, Named Set, or Expression).
- **Clear Filter** – Click as a shortcut to clearing the filter from the level.
- **Advanced Select** – Click to access the Advanced Select Members window if you prefer to use that advanced version of the window to search for, select, or clear. The advanced window is helpful when working with levels for which a large amount of members exist.
- **Display Options** – Use to change the display columns in this window. You can display up to 10 display columns for a level in the Select Members window.
- **Paste** – Click to access the Paste Members window, which lets you copy a list of members into the member list that you are building. Valid values identified in the Paste Members window will get selected in the Select Members window when you are done identifying members for your filter via the Paste Members window.



Select User List Filter Window

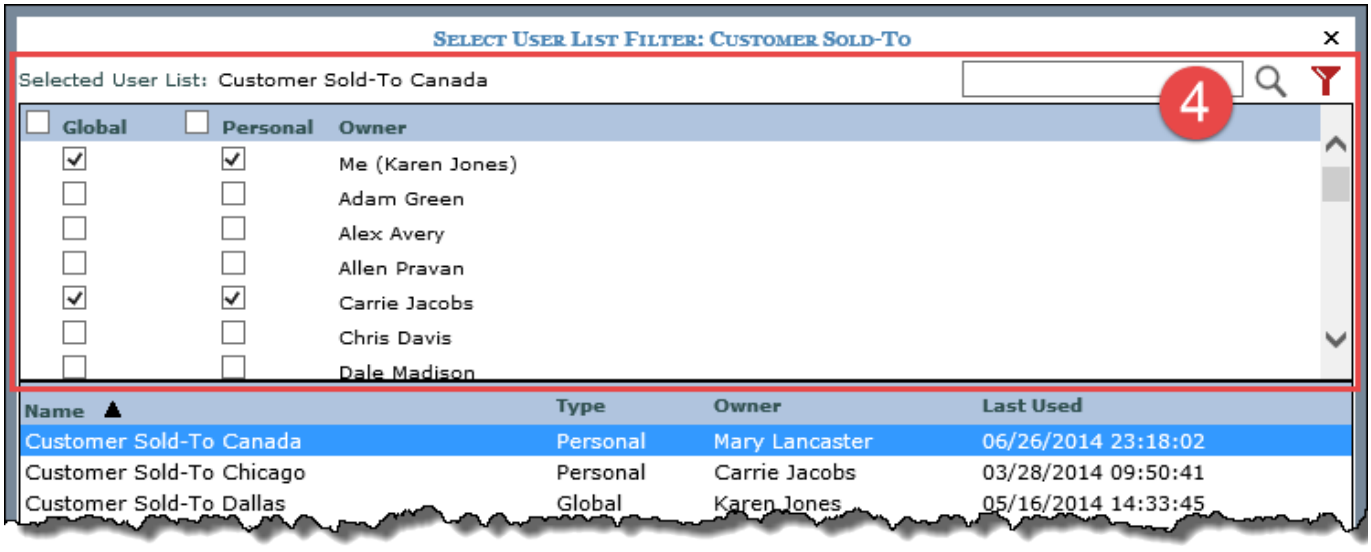
Main Window Sections



1	**Selected User List** – The name of the actively selected list displays here.
2	**Available User Lists** – Click a list then OK to apply the list as a filter. • This is a list of all user lists that meet search and filter criteria. You can use search to find a user list with a particular name or use the filter tool to look up lists of only certain users (See Search and Filter Features). You can use the Show Details section to look up list properties and members. • To sort the displayed lists, click the Name, Type, Owner, or Last Used column heading. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange columns in the section, click a column heading, drag it before or after another column heading, and drop it at the new location. • At the bottom of this section (you may need to scroll down), this is a count of how many lists are displayed in the window. There are paging arrows to move between pages of lists. Arrows are active only when more lists exist than can be displayed in a single page of this section. 1 to 27 of 27 ⏮ ◀ 1 ▶ ⏭
3	**OK** – Click OK to apply the user list selection made in this window and to close the window. **Cancel** – Click Cancel to close the window without applying your selection. **Filter Type** - When you access this window from a view to create a level filter, it will include this button. Click to access the Select Filter Method window if you need to apply a different type of filter to the level (Member List, Named Set, and Expression).
4	See the next two sections for information about the search, filter, and detail lookup tools in this window.

Search and Filter Features

Optionally use the search and/or filter features (section marked '4' in following image) to look for particular user lists.



- **Search** – Enter all or part of the name(s) of the list(s) you are searching for and then click the Search button to execute the search.

- **Filter** – Click the provided button to use the filter feature. It acts as a toggle to show or hide the filter feature. Use the Global and Personal checkboxes to the left of a user's name to indicate whose lists you want to see (users with selected checkboxes will be included in filter results). The checkboxes next to the Global and Personal headings are toggles that select or deselect all Global or Personal lists of all users at one time (for example, if the Personal heading checkbox is selected, all Personal lists of all users will display in the window). At the bottom of the filter section (you may need to scroll down), there is a count of users. There are paging arrows to move between pages of users. Arrows are active only when more users exist than can be displayed in a single page of this section.

Note: The filter toggle will be red if a filter has been applied. If you are using the filter section and then access the details section of the window, the filter section will close automatically.

Show Details Feature

Optionally use this section to view details about the list that is actively selected in the window. Select a list and then click the Show Details button. Click the Hide Details button to hide the section. You can see the members in the list, the list description, count of members in the list, and the list mode (Static or Dynamic).



- Information that displays for list members depends on whether you accessed the window from a view or the Role Maintenance window. If accessed from a view, the section displays attribute relationships available for the level in the view. If accessed from the Role Maintenance window, the section displays attribute relationships as defined by administrative settings in the Dimension window.

Note: Only members your role permits you to access will display. The section will be blank if your role doesn't permit you to access any of the list members.

- To sort detail information, click the heading for any column of information displayed for the members. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange columns in the section, click a column heading, drag it before or after another column heading, and drop it at the new location.
- At the bottom of the details section (you may need to scroll down), this is a count of how many members are in the list. There are paging arrows to move between pages of members. Arrows are active only when more members exist than can be displayed in a single page of this section.

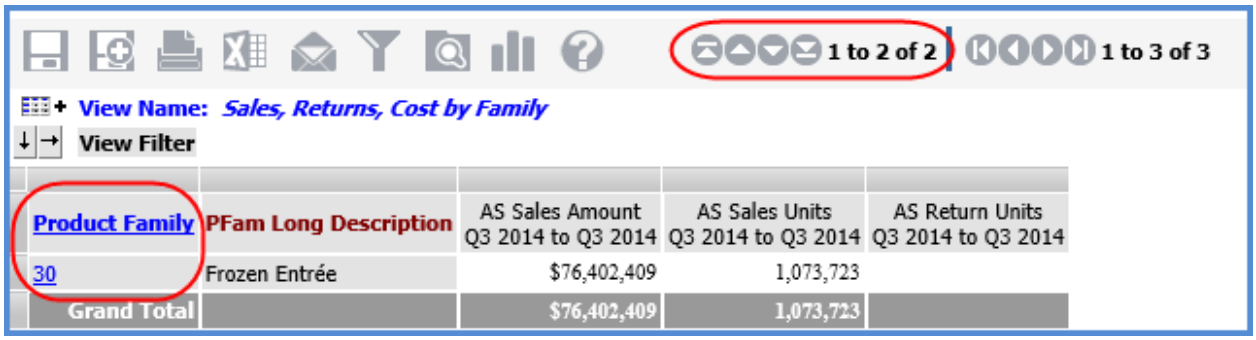
Note: If you are using the details section and then access the filter section of the window, the details section will close automatically.

Impact of Roles on What Data You can Access in Stratum.Viewer

Security administrators set up roles for the user profiles or user profile groups of users who have a casual, advanced, or view administrator level of access to the application. Roles determine what data you will see when you run views, user filtering windows, and insert or edit measure items. You can be given full or partial access to dimensions which will impact the dimension members that you can see in views and filtering windows. Administrators can give you Read access to some or all measures, which impacts the measure items that you will see in your views and measure item windows. Your administrator also can set up properties in roles and measure administration settings that allow you to make planning updates in views.

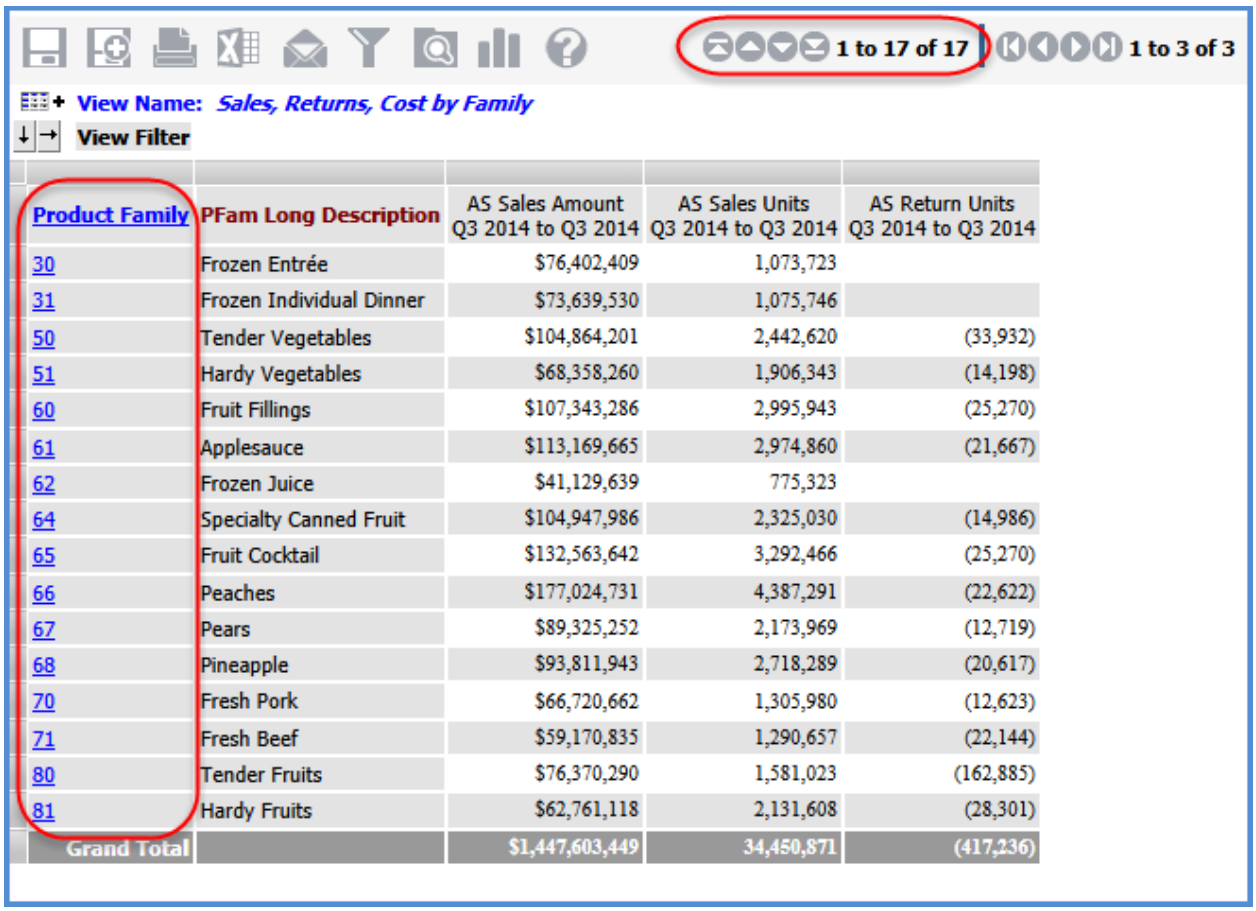
Dimensions

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



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



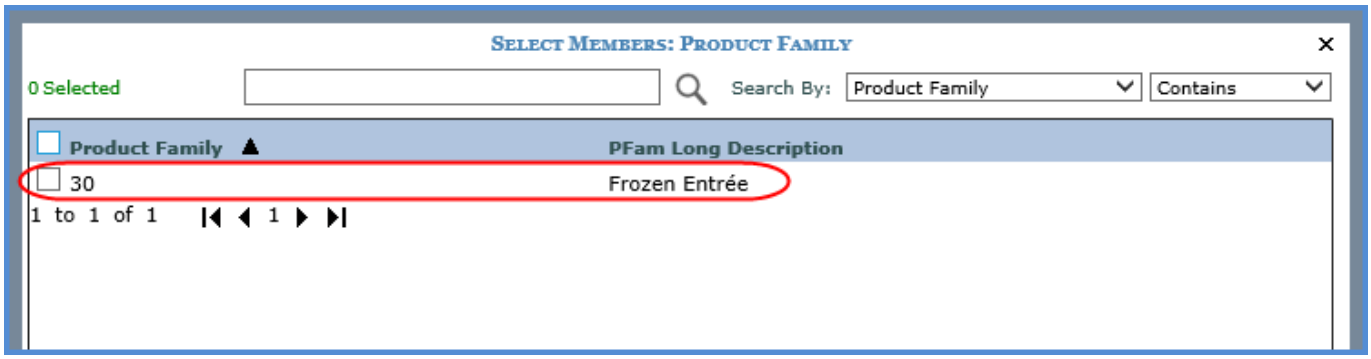
1 to 17 of 17 | 1 to 3 of 3

View Name: *Sales, Returns, Cost by Family*

View Filter

Product Family	PFam Long Description	AS Sales Amount Q3 2014 to Q3 2014	AS Sales Units Q3 2014 to Q3 2014	AS Return Units Q3 2014 to Q3 2014
30	Frozen Entrée	$76,402,409	1,073,723	
31	Frozen Individual Dinner	$73,639,530	1,075,746	
50	Tender Vegetables	$104,864,201	2,442,620	(33,932)
51	Hardy Vegetables	$68,358,260	1,906,343	(14,198)
60	Fruit Fillings	$107,343,286	2,995,943	(25,270)
61	Applesauce	$113,169,665	2,974,860	(21,667)
62	Frozen Juice	$41,129,639	775,323	
64	Specialty Canned Fruit	$104,947,986	2,325,030	(14,986)
65	Fruit Cocktail	$132,563,642	3,292,466	(25,270)
66	Peaches	$177,024,731	4,387,291	(22,622)
67	Pears	$89,325,252	2,173,969	(12,719)
68	Pineapple	$93,811,943	2,718,289	(20,617)
70	Fresh Pork	$66,720,662	1,305,980	(12,623)
71	Fresh Beef	$59,170,835	1,290,657	(22,144)
80	Tender Fruits	$76,370,290	1,581,023	(162,885)
81	Hardy Fruits	$62,761,118	2,131,608	(28,301)
Grand Total		$1,447,603,449	34,450,871	(417,236)

Roles also impact the data that displays in the Select Members, Advanced Select Members, Paste Members, and Select User List Filter windows. Here is what the Select Members window looks like for the user with access only to Product Family 30.



SELECT MEMBERS: PRODUCT FAMILY

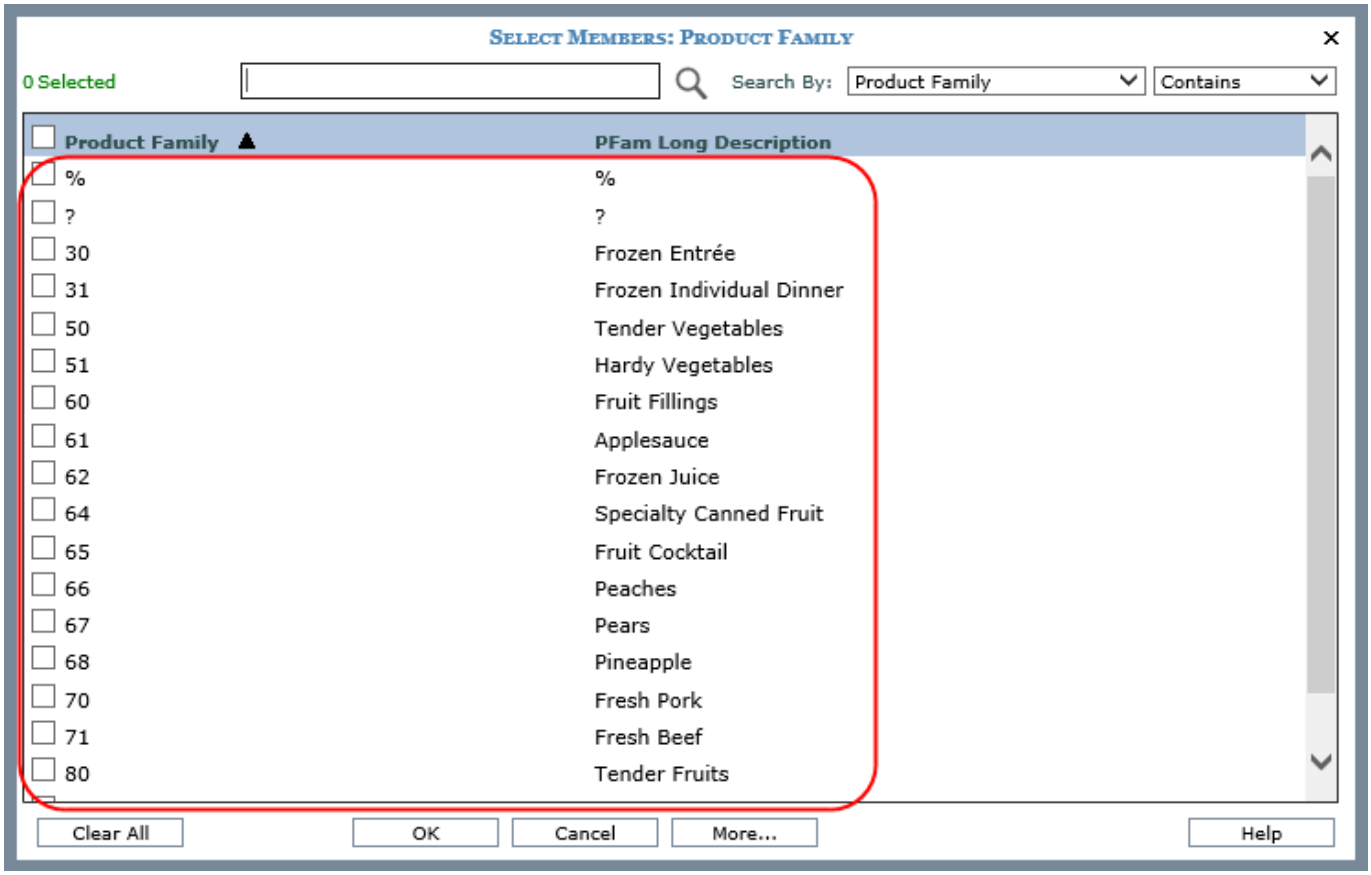
0 Selected

Search By: Product Family | Contains

Product Family	PFam Long Description
30	Frozen Entrée

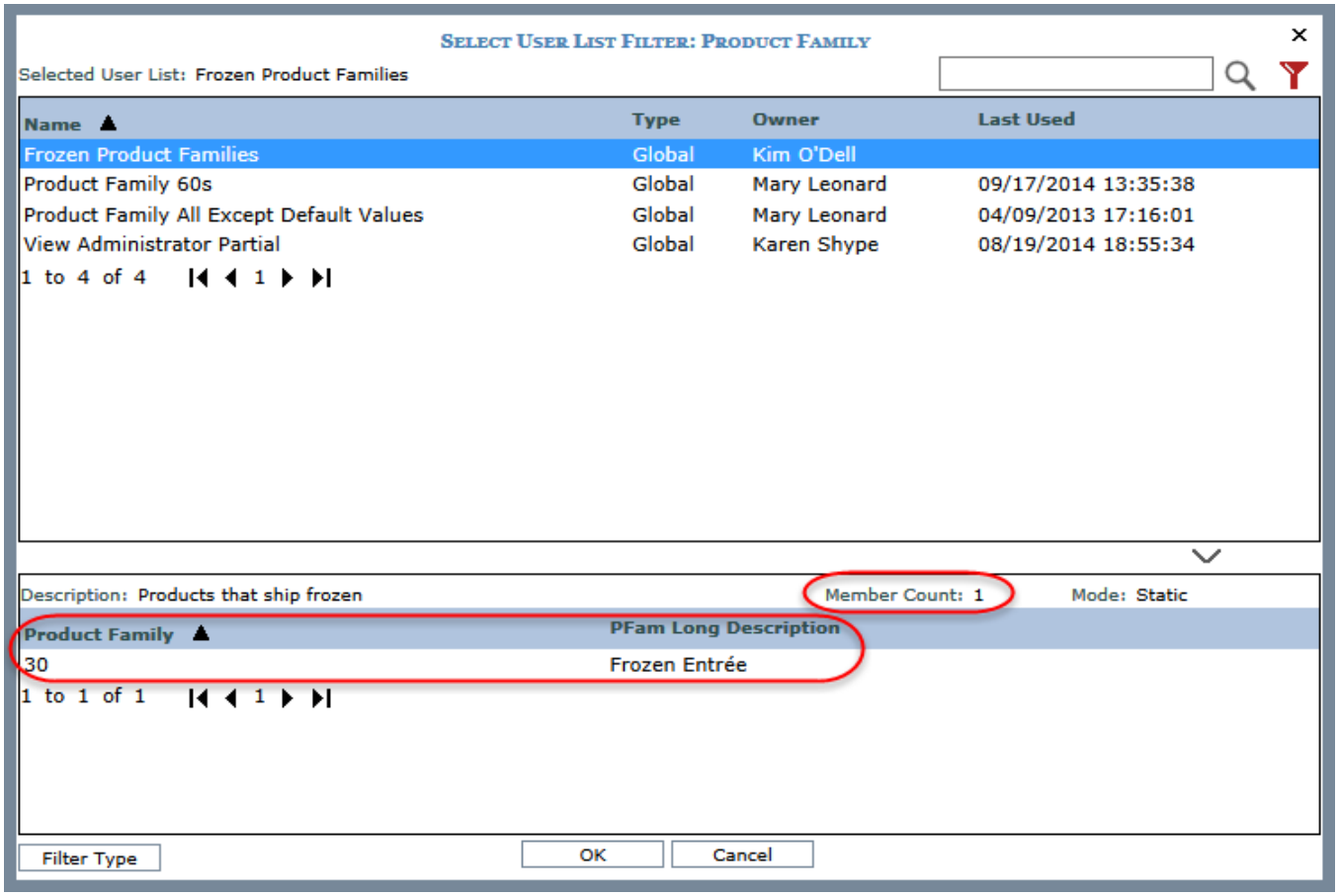
1 to 1 of 1

Here is what the window looks like for a user with full access to the Product Family dimension.

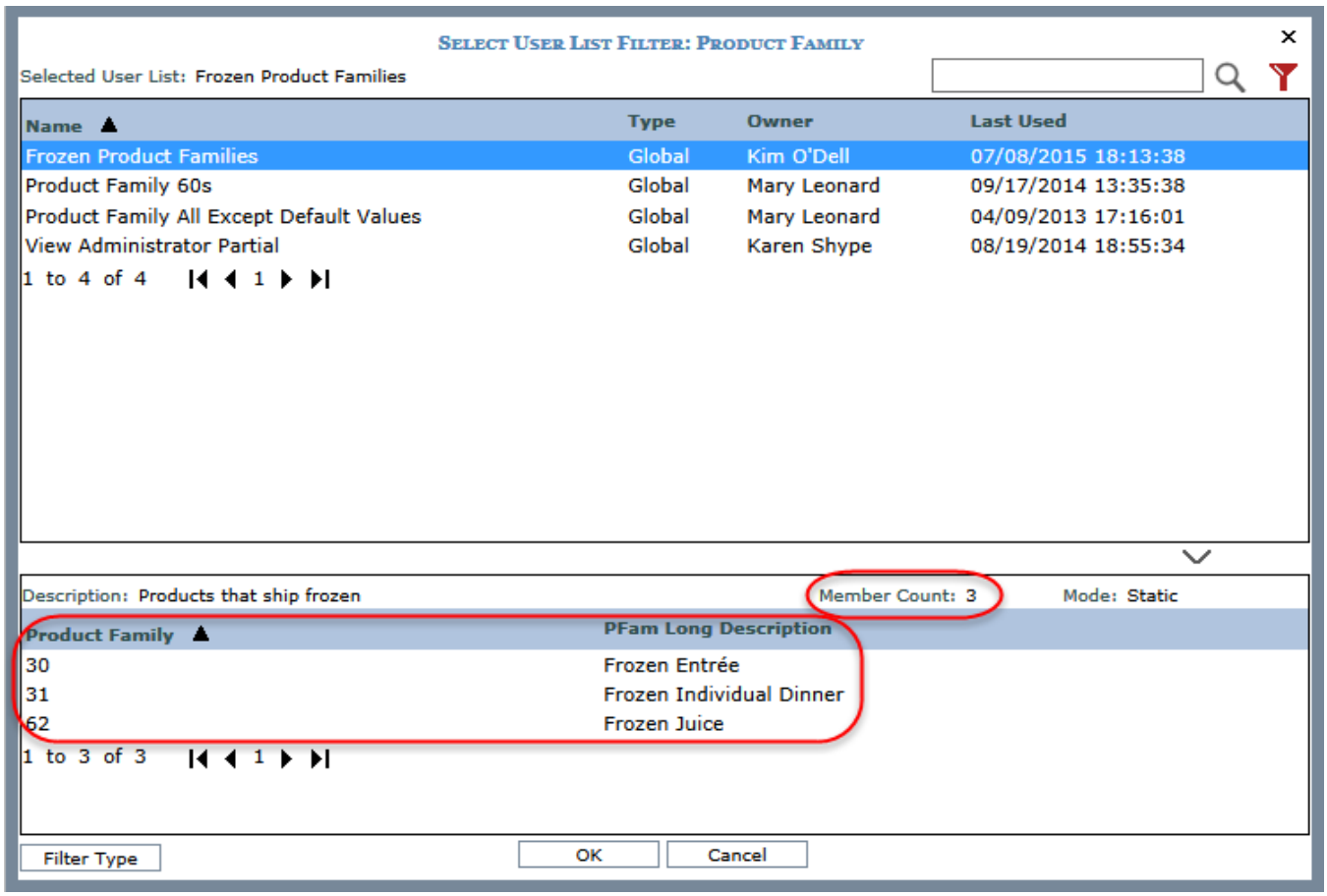


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Next, consider a user list that contains three Product Family members including 30. The user with access only to Product Family 30 will see that member only when they click Show Details for the list.



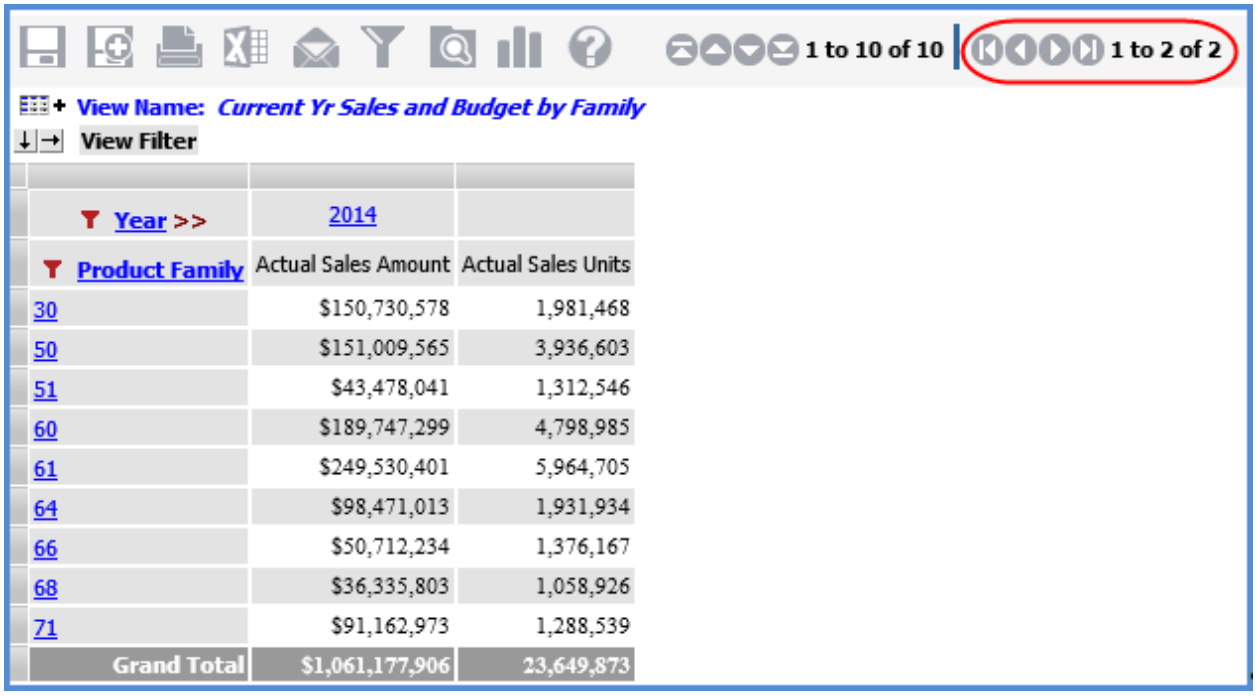
All three list members display when the list members are viewed by a user with full access to the Product Family dimension.



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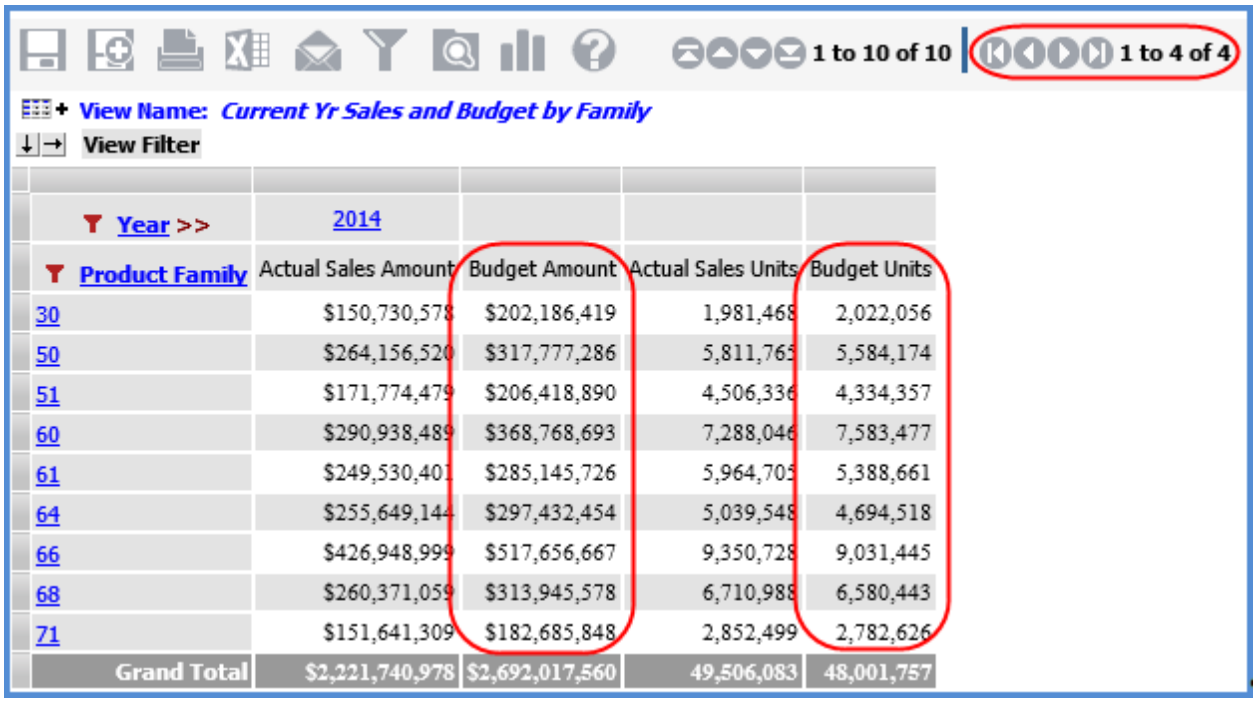
Measures

A role controls which measures users are able to see. Below is a view defined to display two measure items based on some Actual Sales measures and two based on Budget measures. The user running the view has permission to see all Actual Sales measures but does not have permissions to any Budget measures. That means the view will only return the measure items based on Actual Sales for this user.



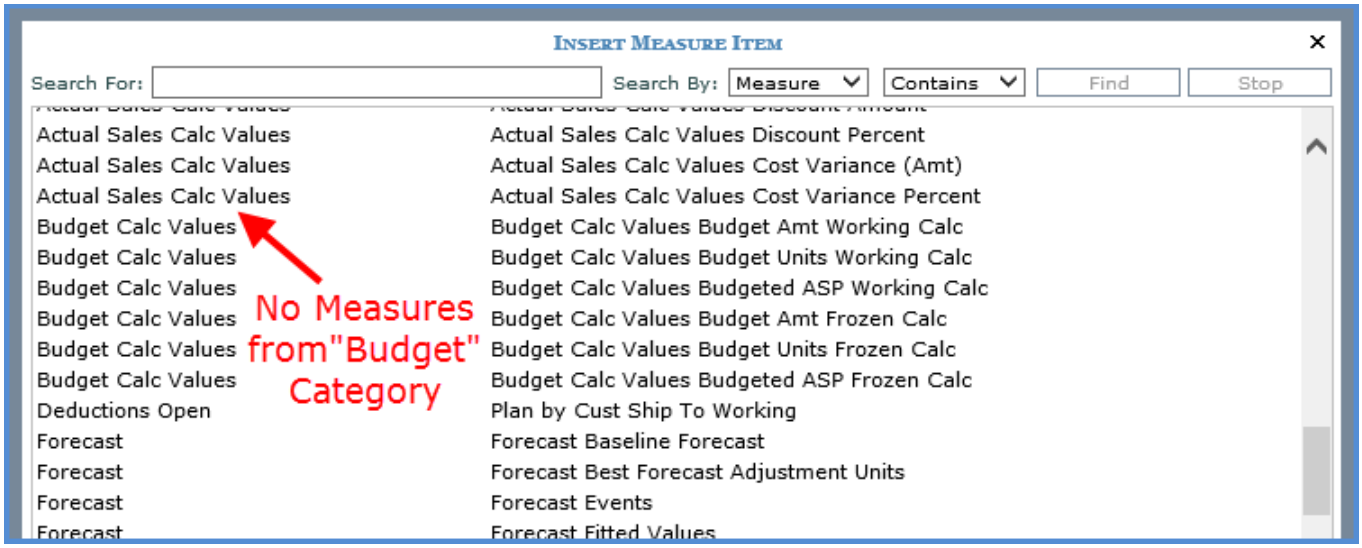
Year >>	2014	
Product Family	Actual Sales Amount	Actual Sales Units
30	$150,730,578	1,981,468
50	$151,009,565	3,936,603
51	$43,478,041	1,312,546
60	$189,747,299	4,798,985
61	$249,530,401	5,964,705
64	$98,471,013	1,931,934
66	$50,712,234	1,376,167
68	$36,335,803	1,058,926
71	$91,162,973	1,288,539
Grand Total	$1,061,177,906	23,649,873

Here is the same view run by a user with access to all Actual Sales and Budget measures. That user has access to all measures in the view.

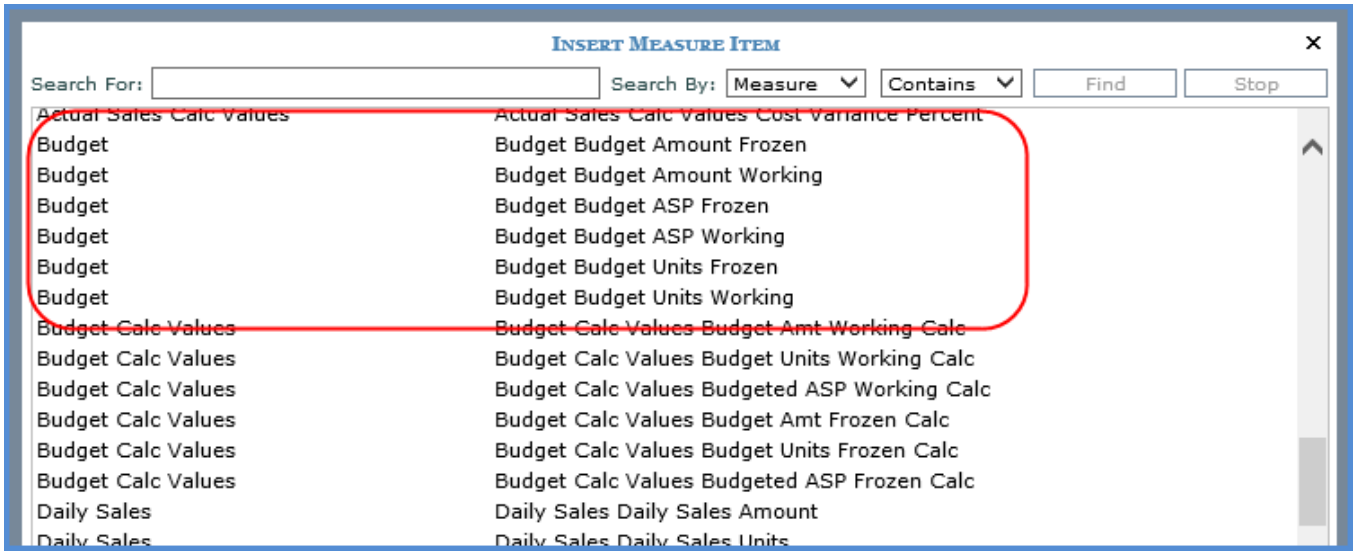


Year >>	2014			
Product Family	Actual Sales Amount	Budget Amount	Actual Sales Units	Budget Units
30	$150,730,578	$202,186,419	1,981,468	2,022,056
50	$264,156,520	$317,777,286	5,811,763	5,584,174
51	$171,774,479	$206,418,890	4,506,336	4,334,357
60	$290,938,489	$368,768,693	7,288,046	7,583,477
61	$249,530,401	$285,145,726	5,964,705	5,388,661
64	$255,649,144	$297,432,454	5,039,548	4,694,518
66	$426,948,999	$517,656,667	9,350,728	9,031,445
68	$260,371,059	$313,945,578	6,710,988	6,580,443
71	$151,641,309	$182,685,848	2,852,499	2,782,626
Grand Total	$2,221,740,978	$2,692,017,560	49,506,083	48,001,757

Also note, the user with the role restrictions in this example will not see the measures in question in the Add and Edit Measure Items windows. Here is the Add window for that user.



All Budget measures, both “Working” and “Frozen,” display when the other user with full access uses the window.



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Measure Items Created from Stratum.Planner Calculated Values

Regardless of your role, all Stratum.Planner calculated values that are part of your environment will display in the Add and Edit Measure items windows.

Notice that six Budget Calc Values showed for both users mentioned in our prior example. If a calculated value requires a regular measure to which you don't have access, then #ERR will be returned by the calculation in the Stratum.Viewer grid. For example, the marked measure item below is a calculation that requires data from the Budget Budget Amount Frozen and Budget Budget Units Frozen measures. A user with a role that permits him to see those measures will be able to see data returned in the view for the measure item.

View Name: *Avg vs Budgeted ASP Current Month*

View Filter

ABC Classification Code	Product	Actual Sales Calc Values Sales Avg Selling Price Sep 2014 to Sep 2014	Budget Calc Values Budgeted ASP Frozen Sep 2014 to Sep 2014
A	Applesauce 12oz BR* 0A	$36.27	$40.58
	Pear Slcs LS 12 oz BR* 0A		$41.46
	Pear Hlvs LS 12oz PL* 0A		$35.13
	Applesauce 12oz PL* 0A	$31.64	
	Apple Filling 12oz PL* 0A		$32.25
	Applesauce 106oz BR* 0A	$62.10	$69.21
	Applesauce 106oz PL* 0A	$51.13	$57.24
	Apple Filling 106oz PL* 0A	$50.32	$56.10
	Applesauce 12oz BR* 0B	$36.27	$40.58
	Pear Slcs LS 12 oz BR* 0B		$41.46
	Pear Hlvs LS 12oz PL* 0B		$35.13
	Applesauce 12oz PL* 0B	$31.64	
	Apple Filling 12oz PL* 0B		$32.25
	Applesauce 106oz BR* 0B	$62.10	$69.21
	Applesauce 106oz PL* 0B	$51.13	$57.24
	Apple Filling 106oz PL* 0B	$50.32	$56.10
	Applesauce 12oz BR* 0C	$36.27	$40.58

When a user who is not permitted to access Budget Budget Amount Frozen or Budget Budget Units Frozen runs the same view, that user sees results of #ERR.

View Name: *Avg vs Budgeted ASP Current Month*

View Filter

ABC Classification Code	Product	Actual Sales Calc Values Sales Avg Selling Price Sep 2014 to Sep 2014	Budget Calc Values Budgeted ASP Frozen Sep 2014 to Sep 2014
A	Pear Hlvs LS 12 oz BR* 0A		#ERR
	Applesauce 12oz BR* 0A	$36.27	#ERR
	Pear Slcs LS 12 oz BR* 0A		#ERR
	Pear 6oz LnchPk LS 0A		#ERR
	Escalloped Apples 12 oz BR* 0A		#ERR
	Apple Filling 12oz BR* 0A		#ERR
	Pear Hlvs LS 12oz PL* 0A		#ERR
	Applesauce 12oz PL* 0A	$31.64	#ERR
	Apple Filling 12oz PL* 0A		#ERR
	Pear Hlvs LS 106 oz BR* 0A		#ERR
	Applesauce 106oz BR* 0A	$62.10	#ERR
	Escalloped Apples 106 oz BR* 0A		#ERR
	Apple Filling 106oz BR* 0A		#ERR
	Pear Hlvs LS 106oz PL* 0A		#ERR
	Applesauce 106oz PL* 0A	$51.13	#ERR
	Apple Filling 106oz PL* 0A	$50.32	#ERR
	Pear Hlvs LS 12 oz BR* 0B		#ERR
	Applesauce 12oz BR* 0B	$36.27	#ERR

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Give Users Authority to Make Planning Updates in Views

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. To give users Update authority to measures for planning purposes, edit the Measures tab in the role for that user. See the Planning section of Stratum.Viewer help for other tasks to complete to support planning on measures in views.

1. Click Manage Things then Role in the main menu of the top panel of Stratum.

2. Double-click the user's role in the Role list window.

3. In the Role Maintenance window, use the Update checkboxes on the Measures tab to give 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.

Relationship between User Profiles, User Profile Groups, and Roles

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

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

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

***Note:** A Broadcast User type of profile does not have access to Stratum applications, but they do have a role and user group assigned to their profile so they can receive secure reports of Stratum data from Stratum Broadcast Manager actions.

What Happens if I Don't Select a User Profile Group or User Profile for a Role?

The role definition will be saved but not actively used by the application. The role only takes effect after it has been attached to a user profile or user profile group.

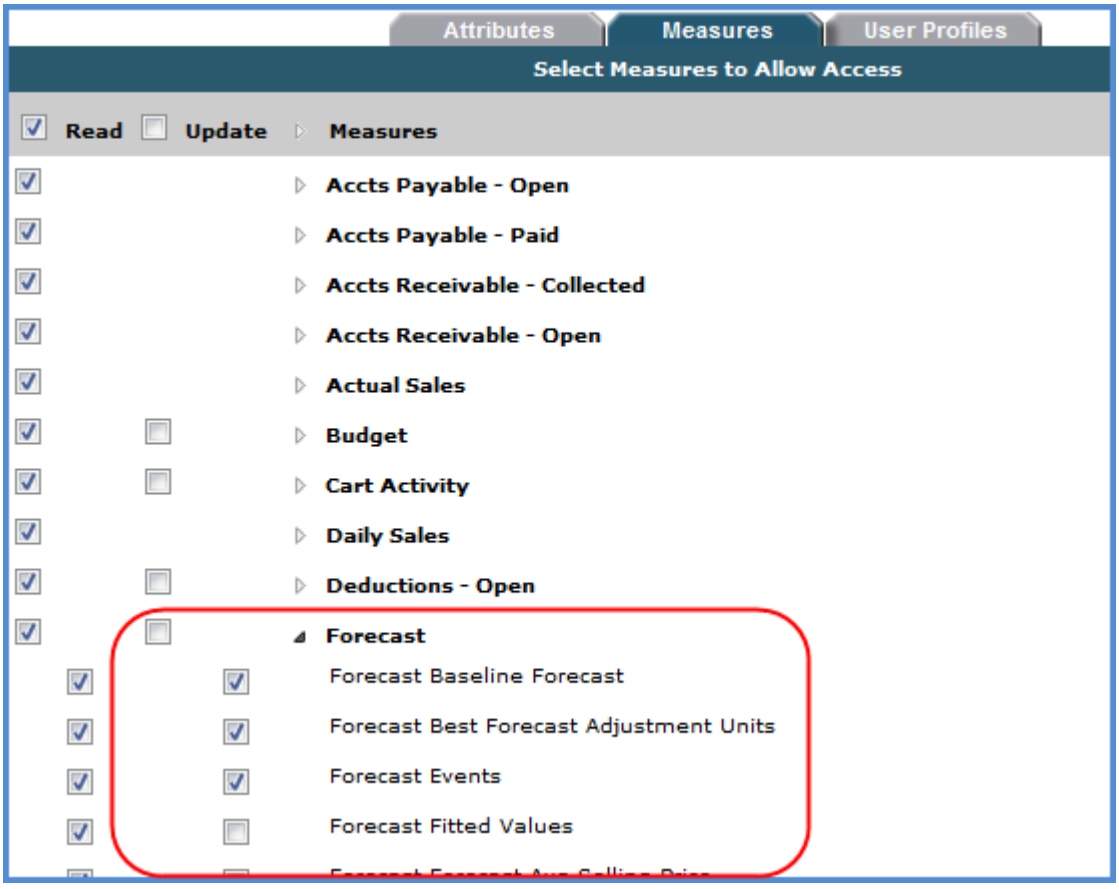
Why don't Security Administrators need to be Assigned Roles?

Security administrators are automatically given access to all dimension attributes and measures. That allows them to set up roles and control access for users with other levels of access in the application.

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.

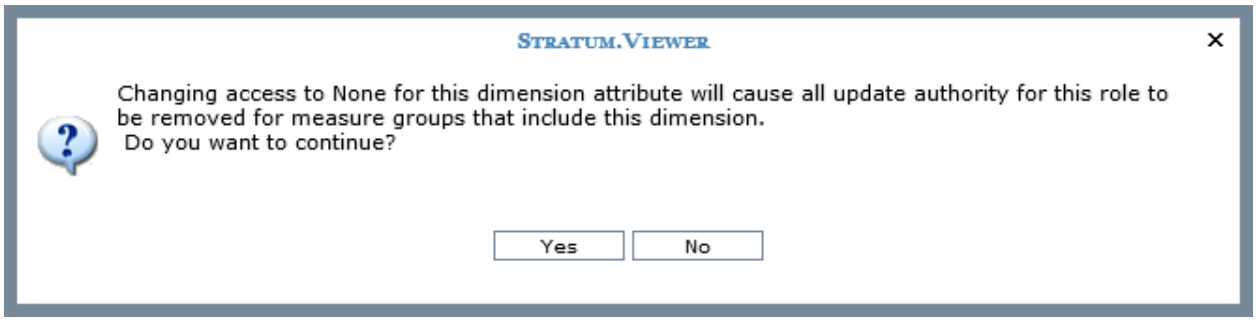


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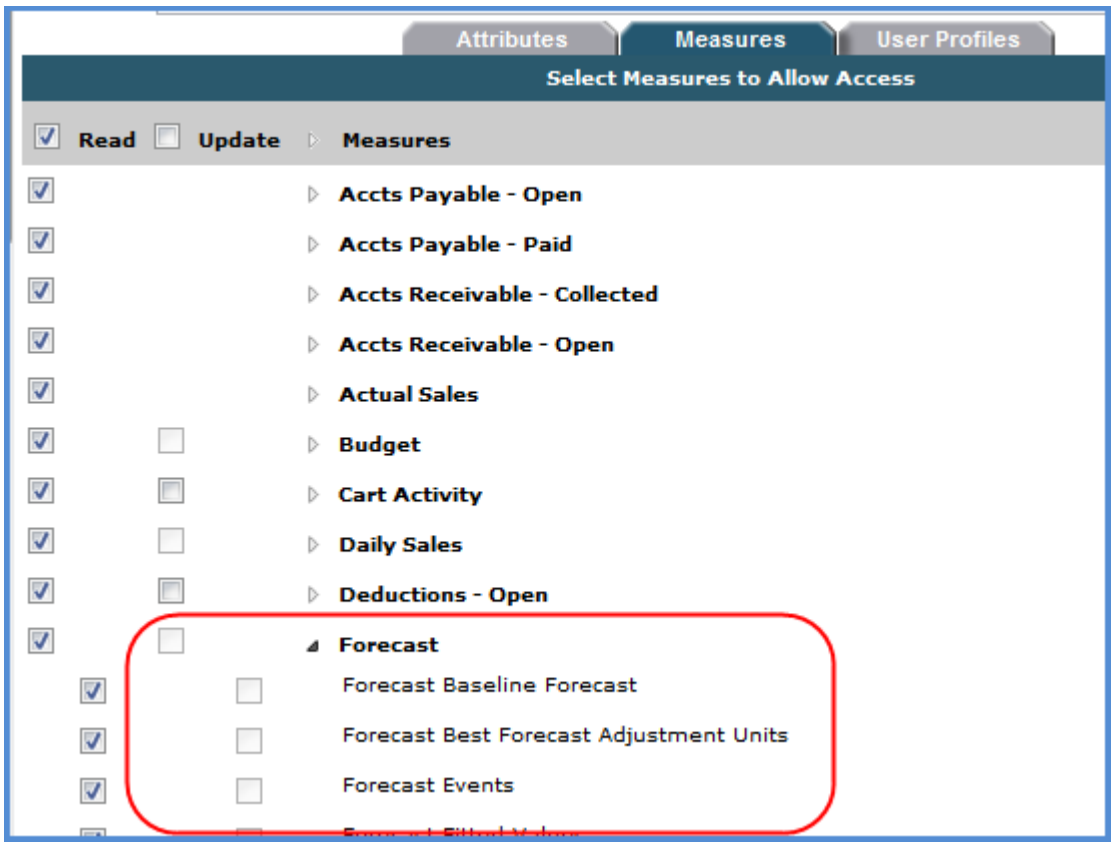
The next image shows an edit being made to a dimension attribute for the role. The Access drop-down list for Company Value is set to None. Update authority for the role will be removed for all measure groups that include the Company dimension. Update checkboxes for them will be disabled.



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.

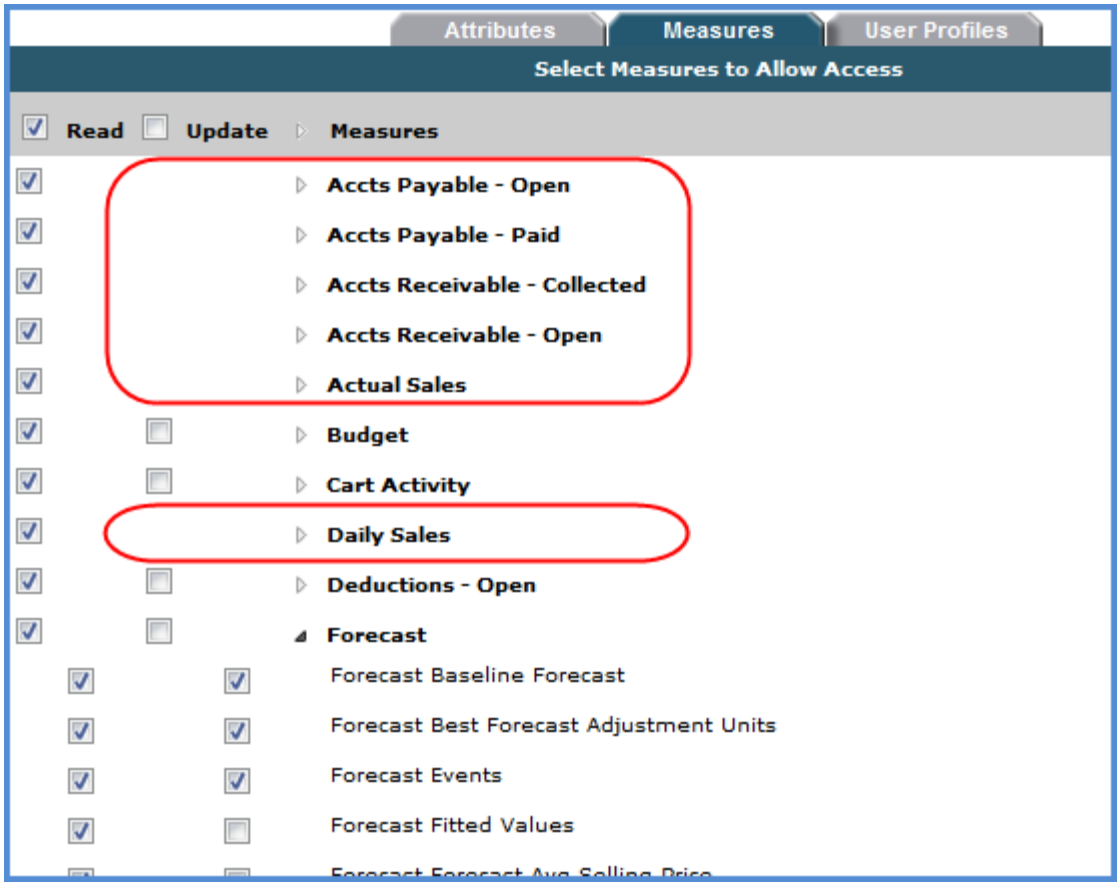


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Why isn't there an Update Checkbox Available for a Role's Category?

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.



Definitions

Attribute

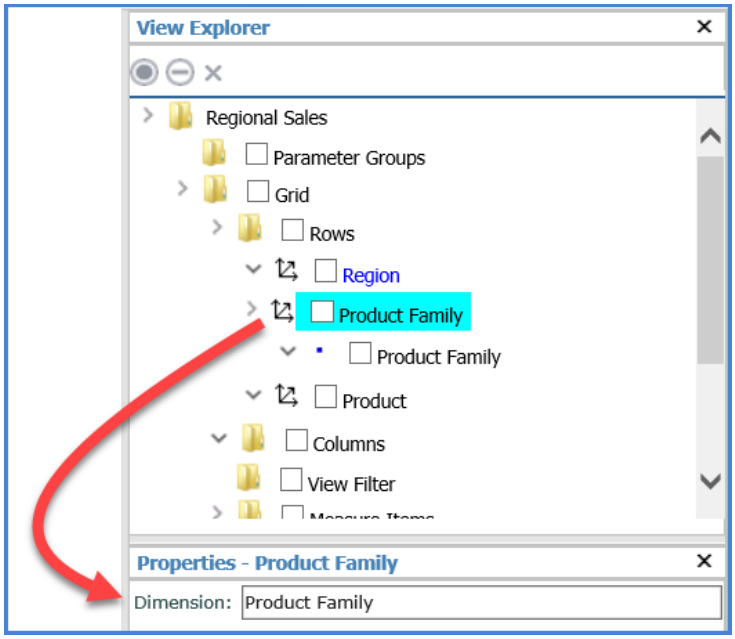
Attributes are the pieces of data that are stored in an Analysis Services database for a dimension. Each dimension must have a key attribute value. Additional attributes are optional. Key attribute values are used while setting up roles using the Role Maintenance window.

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.

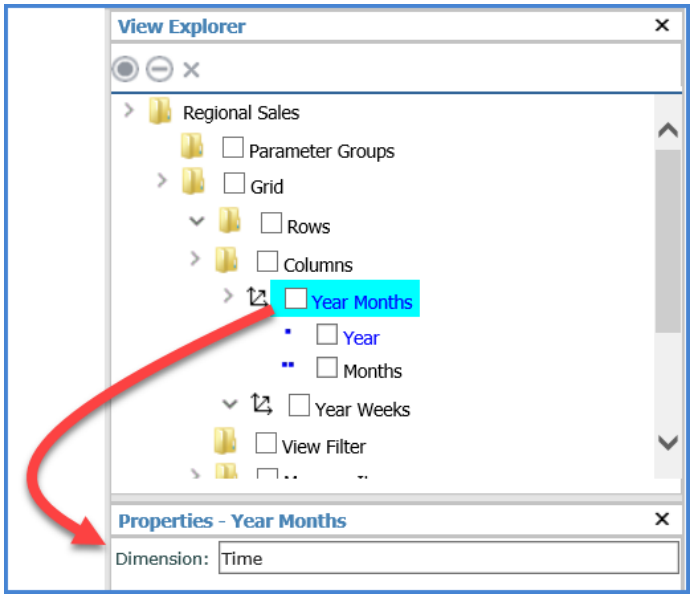
Dimension with Single Hierarchy

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.



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Measure

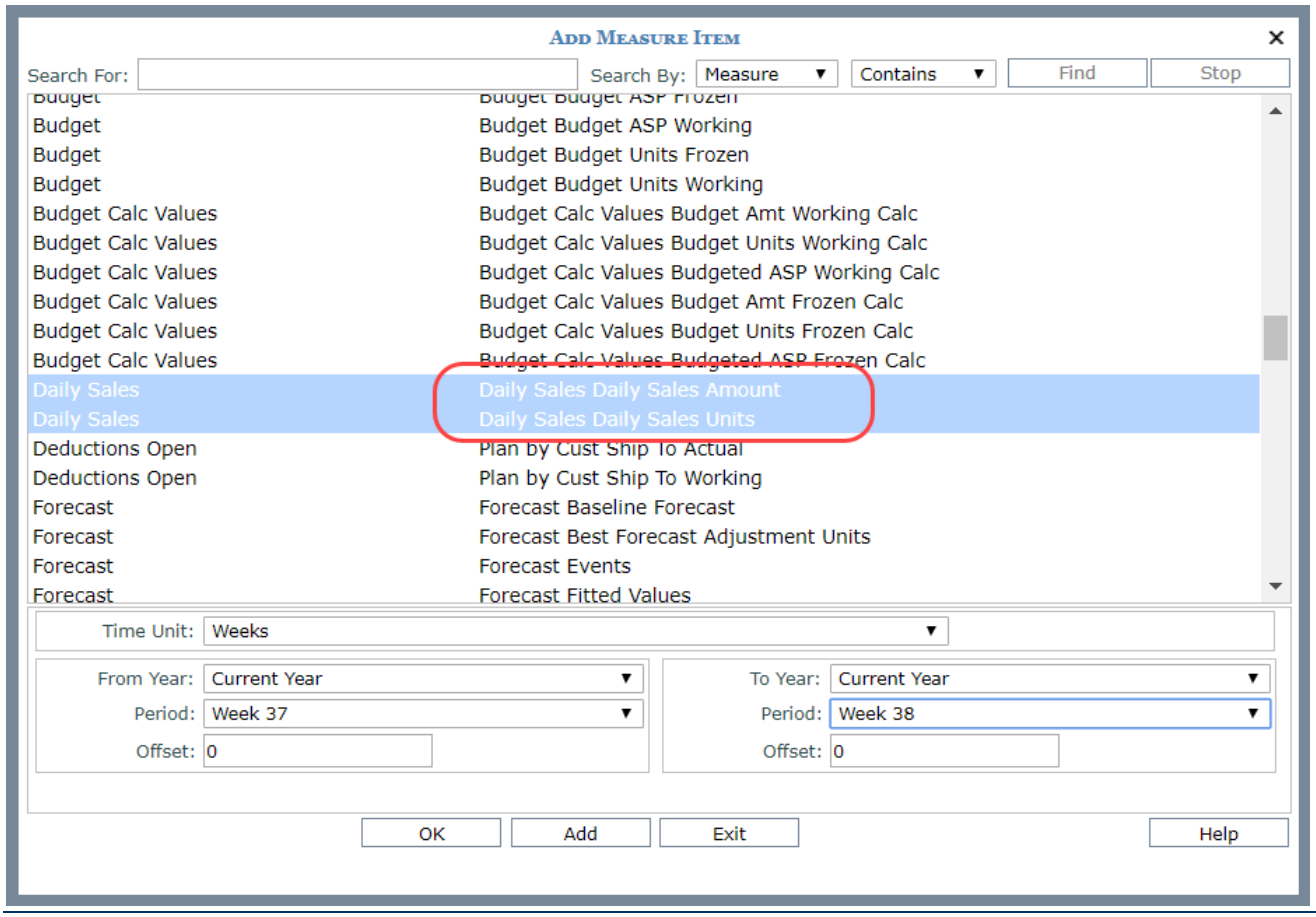
Measures are the basic units of data for your dimensions, hierarchies, and levels. Measures are used to create and insert measure items into your views. They can also be used when building the expressions for calculated measure items.

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

View Name: *Daily Sales by Customer Type*

View Filter

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



Member

There is a 3-part structure of information within Stratum.Viewer that includes dimensions, hierarchies, and levels. Members belong to levels and represent the items of information for each level. You can see an example of members in the rows or columns of your views. Members can be displayed by their value or an attribute relationship. In the following example, there is a Product Family level on rows and five of its members are displayed by value. The PFam Long Description attribute relationship also displays for each member.

Members can be used in several ways, such as for filtering or sorting purposes in views and for building user list expressions.

View Name: *Daily Sales by Product Family*

View Filter

Product Family	PFam Long Description	Daily Sales Amount Jan 2014 to Sep 2014	Daily Sales Units Jan 2014 to Sep 2014
50	Tender Vegetables	$1,986,048	91,768
60	Fruit Fillings	$2,141,722	107,390
64	Specialty Canned Fruit	$1,505,100	56,595
65	Fruit Cocktail	$2,008,747	83,519
66	Peaches	$2,827,284	123,190
Grand Total		$10,468,899	462,461

User Profile

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

User Profile Group

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

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