Working with Conditional Formats
Stratum.Viewer 7

Getting Started

- Access to Conditional Formats
- Accessing Conditional Format Functionality
- Introduction to Conditional Formats
- Quick Start – Define a Conditional Format
- Quick Start – Use a Custom Conditional Format

Tasks

Using

- Assign Pre-Defined Conditional Formats to Measure Items
- Assign Custom Conditional Formats to Measure Items
- Clear Conditional Format from Measure Item
- Select a Different Conditional Format for a Measure Item

Editing

- Create a Conditional Format
- Delete a Conditional Format
- Edit a Conditional Format

Additional Information

- Example Views with Conditional Formatting

Windows

- Color Window
- Conditional Format List Window
- Conditional Format Maintenance Window
- Custom Conditional Format Window
- Display Options Window for Conditional Format List Window
- Grid Pop-up Menus
- Properties Window for Individual Measure Items
- Save Conditional Format As Window
- Save Custom Conditional Format As Window
- Select Conditional Format Window
- Select Format Window For Conditional Formats
- Select Icon Window
- Select Icon Set Window
- Select User Window

Advanced Concepts

- Add Custom Icons for Conditional Formatting
- Cell Formatting with Conditional Formats, Hyperlinks, Drilldown Views, and Pop-up Labels
- Change the Conditional Format's Display Options
- Change the Owner of a Conditional Format
- Use Pre-fill Icons

Getting Started

Access to Conditional Formats

Your user profile level controls what you can do with conditional formats.

User Profile Level	Personal Conditional Formats*				Global Conditional Formats			
	Create	**Edit**	**Delete**	**Use**	**Create**	**Edit**	**Delete**	**Use**
Casual	✖	✖	✖	✖	✖	✖	✖	✔
Advanced	✔	✔*	✔*	✔	✖	✖	✖	✔
View Administrator	✔	✔*	✔*	✔	✔	✔	✔	✔
Security Administrator	✔	✔*	✔*	✔	✔	✔	✔	✔

* View and security administrators also can edit and delete other user's conditional formats.

Accessing Conditional Format Functionality

To work with conditional formats directly from a view, use the Conditional Format option on a measure item's context menu. Right-click a measure item caption and choose Conditional Format. You also can access conditional format functionality from measure item Properties windows. To see a list of all conditional formats, advanced users and administrators can click Manage Things then Conditional Format from the main menu in the top panel of Stratum.

Measure Item Context Menu

①	**Edit** – Use to edit the conditional format associated with the selected measure item. The Select Conditional Format window will display.
②	**Clear / Clear All** – Click Clear to clear the conditional format associated with the selected measure item. Click Clear All to clear all conditional formats from the view. **Note**: The conditional formats will not be deleted. They will only be cleared from the measure item definition(s) in this view.

Measure Item Properties Window

1	**Conditional Format** – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. If Yes, the browse button ⋯ accesses the Select Conditional Format window where you select the conditional format associated with the measure item.

The name of the selected conditional format displays in the text box left of the ⋯ icon. In this example, the Percent of Total Growth conditional format is used. |

Introduction to Conditional Formats

Conditional Formatting provides the ability to visually represent and highlight data in the grid using indicators that are based on a predefined set of criteria. For example, conditional formatting icons can be used as traffic lights that grab the user's attention and quickly convey a status that is based on underlying detailed data within Stratum.Viewer. Icons also help the user visualize answers to the following types of questions:

- What are we ahead or behind on?
- What goals have been reached? Which have not?
- Are we improving or getting worse?

Conditional Format Examples

The following are examples of views with conditional formatting.

The view below has a conditional format applied to the measure item "Gross Margin Amount." It is defined to display a green up arrow when the margin is greater than $10,000. A yellow horizontal arrow displays if margin is between $5,000 and $10,000. A red down arrow displays if margin is below $5,000. This measure item also has been defined with a pop-up label that displays the Gross Margin Amount value as well as the criteria associated with the conditional format.

View Name: *Product Sales, Returns, Margins*
View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	↓
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	↓
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	↗
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	↗
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	↓
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	↓
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	↗
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	↓
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)		
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)		
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)		
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)		↗
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445	↑
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608	↓
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054	↗
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597	↑
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135	↓
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419	↓
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868	↑
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547	↑

Gross Margin is $16,649. Green arrows indicate margins above $10,000. Yellow arrows indicate margins between $5,000 and $10,000. Red arrows indicate margins below $5,000.

The view below has a conditional format applied to the Gross Margin Amount measure item that displays indicator icons. The Gross Margin Amount value displays in addition to the indicator icons.

View Name: *Product Sales, Returns, Margins*

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725 ⬇	$2,787
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663 ⬇	$1,580
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406 ⬂	$7,732
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423 ⬂	$5,099
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443 ⬇	$3,909
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053 ⬇	$3,785
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530 ⬂	$5,304
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551 ⬇	$4,638
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)	$13,161 ⬇	$4,860
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)	$14,362 ⬂	$5,534
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)	$20,638 ⬂	$6,458
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)	$31,181 ⬂	$8,207
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445 ⬆	$16,649
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608 ⬇	$2,444
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054 ⬂	$7,829
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597 ⬆	$32,383
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135 ⬇	$1,289
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419 ⬇	$1,877
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868 ⬆	$14,192
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547 ⬆	$12,439

The view below has a conditional format applied to the Gross Margin Amount measure item that uses cell coloring to highlight margins below a desired target of $5,000.

View Name: *Product Sales, Returns, Margins*
View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	$2,787
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	$1,580
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	$7,732
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	$5,099
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	$3,909
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	$3,785
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	$5,304
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	$4,638
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)	$13,161	$4,860
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)	$14,362	$5,534
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)	$20,638	$6,458
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)	$31,181	$8,207
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445	$16,649
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608	$2,444
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054	$7,829
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597	$32,383
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135	$1,289
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419	$1,877
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868	$14,192
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547	$12,439

Quick Start – Define a Conditional Format

See a typical path taken to set up a conditional format.

(1) **Click Manage Things then Conditional Format from the main menu in the top panel of Stratum.**

(2) **Click the New button on the Conditional Format List window and set up the rules for your conditional format.**

Conditional Format

Name ▲	Type	Last Used Date
ASP >= $25	Personal	07/03/2014 16:46:30
Cost Exceeding Sales	Global	
Freight Cost Difference	Global	07/28/2014 19:02:50
Google	Global	07/28/2014 13:46:20
Gross Margin Tracking	Global	07/03/2014 16:46:38
Inventory Nearing Expiration Date	Personal	
Map It	Global	07/28/2014 13:46:20
Percent of Total Growth	Global	08/05/2014 10:39:46
Percent of Total Growth with Cell Coloring	Global	08/05/2014 10:18:25
Sales less than 100K	Global	07/28/2014 13:34:49
Sales vs Budget Indicator	Personal	11/26/2013 09:16:29
Sales vs Budget Indicator New	Global	07/09/2014 15:17:24

1 to 12 of 12 |◀ ◀ 1 ▶ ▶|

(3) **(a) Specify name for conditional format, specify a description, and identify whether the conditional format will be global or personal.**

Conditional Format Maintenance

(d)

General

Name: Percent of Total Growth **(a)**

Description: Percent of Total Growth

Type: Global   [Pre-fill Icons]

Display the following icons and formats according to these rules:

↕	Icon	Format			Operator		Value	Options	
↑		1234.10	Icon	Format	when value is	>= ∨	0.0001 **(c)**	Add	Remove
◆		1234.10	Icon	Format	when value is	>= ∨	0	Add	Remove
↓		1234.10	Icon **(b)**	Format	for all other values				

(b) **Select the icon and/or cell and text formatting that will be applied to the measure item's cell based on satisfying the associated rule.**

SELECT ICON   ✕

Icon Sets	Icons

▲ 📁 Icons
   ▲ 📁 Directional
      📁 3 Arrows - Colored
      📁 3 Arrows - Gray
      📁 5 Arrows - Colored
      📁 5 Arrows - Gray
   ▷ 📁 Indicators
   📁 Miscellaneous

| OK | Cancel | Clear Icon |

SELECT FORMAT   ✕

                        Viewer Default

Background Color: [red   ] [...]   ☐
Font Color: [black   ] [...]   ☐
Font Style: [Bold Italic   ⌄]   ☐
Font Effect: [⌄]   ☑

Preview text for format selections.

Reset | OK | Cancel |
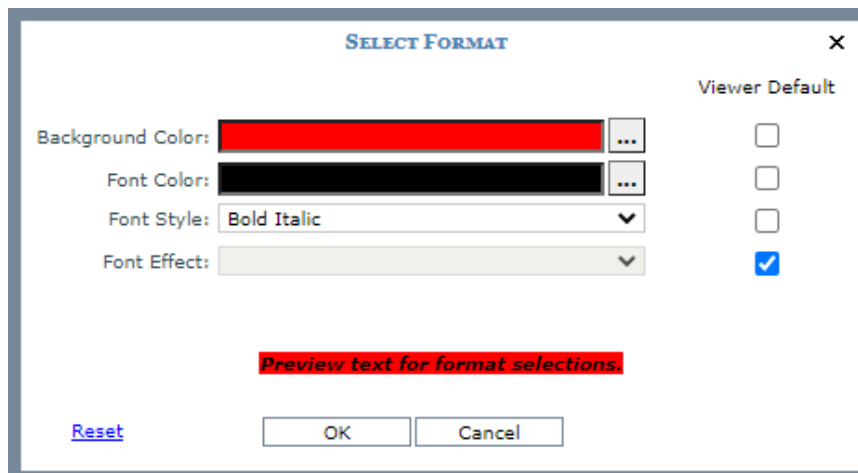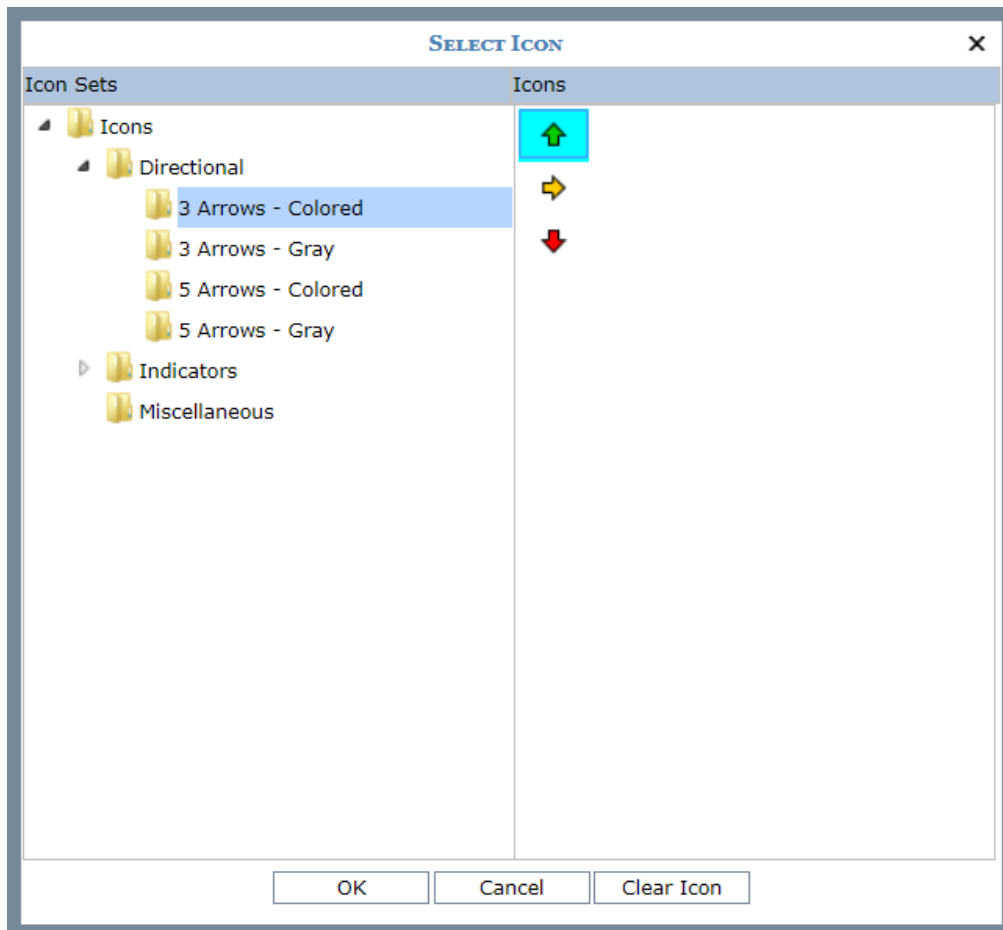
(c) **Select an operator from the drop-down list and enter a value for the rule.**

(d) **Save the conditional format.**

Quick Start – Use a Custom Conditional Format

While defining a measure item, if there is not an existing conditional format that meets your needs, you can use a custom conditional format. Here is a typical path taken to use a custom conditional format.

① **From the measure item Properties window, access the Select Conditional Format window by changing the Conditional Format field from No to Yes, or by clicking the Browse button when a conditional format is currently assigned.**

Note: Another option is to right-click the caption for any measure item in the view, and select Conditional Format then Edit.

② **From the Select Conditional Format window, click the Custom button to access the Custom Conditional Format window.**

SELECT CONDITIONAL FORMAT: % OF TOTAL			✕

Selected Conditional Format:

Name	Type	Owner	Last Used
Cost Exceeding Sales	Global		
Freight Cost Difference	Global		07/28/2014 19:02:50
Google	Global		07/28/2014 13:46:20
Gross Margin Tracking	Global		07/03/2014 16:46:38
Map It	Global		07/28/2014 13:46:20
Percent of Total Growth	Global		08/05/2014 10:39:46
Percent of Total Growth with Cell Coloring	Global		08/05/2014 10:18:25
Sales less than 100K	Global		07/28/2014 13:34:49
Sales vs Budget Indicator New	Global		07/09/2014 15:17:24

1 to 9 of 9 |◀ ◀ 1 ▶ ▶|

Custom   OK   Cancel

③

ⓐ **Specify name for the custom conditional format, and specify a description.**

ⓑ **Define the rule(s) of the custom conditional format, including any text or cell coloring as well as any icon that will display based on satisfying the associated rule.**

ⓒ **Click OK to redisplay the view with the custom conditional format applied.**

Note: Custom conditional formats are intended to be used only one time and are only associated with a single measure item. They are not available for use in other views or by other users. The Save As functionality is available if you wish to create a conditional format definition from a custom conditional format.

Assign Pre-Defined Conditional Formats to Measure Items

1. In the measure item Properties window, set the Conditional Format field to Yes.

    OR

1. Right click on the measure item caption and choose Conditional Format then Edit.

2. From the Select Conditional Format window, choose a conditional format, and the rules of the selected conditional format will display in the right side of the window.

3. Click OK.

4. Apply the changes, and the view will redisplay with the conditional format applied.

Assign Custom Conditional Formats to Measure Items

1. In the measure item Properties window, set the Conditional Format field to Yes.

    OR

1. Right click on the measure item caption and choose Conditional Format then Edit.

2. From the Select Conditional Format window, click the Custom button to access the Custom Conditional Format window.

3. Specify name for the custom conditional format, and specify a description.

4. Define the rule(s) of the custom conditional format, including any text or cell coloring as well as any icon(s) that will display based on satisfying the associated rule.

5. Click OK, and the view will redisplay with the custom conditional format applied.

Clear Conditional Formats from Measure Item

1. In the measure item Properties window, change the Conditional Format field from Yes to No.

2. When prompted to Apply Changes, choose Yes. The view will redisplay without the conditional format applied.

    OR

1. Right click on the measure item caption and choose Conditional Format then Clear.

Note: The conditional formats will not be deleted. It will only be cleared from the measure item definition(s) in this view.

Select a Different Conditional Format for a Measure Item

1. In the measure item Properties window, click the Conditional Format Browse button ⊡.

2. From the Select Conditional Format window, choose a different conditional format and click OK.

    OR

1. Right click on the measure item caption and choose Conditional Format then Edit.

2. From the Select Conditional Format window, choose a different conditional format and click OK.

Tasks - Editing

Create a Conditional Format

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

2. In the Conditional Format list window, click New ⊞ to open the Conditional Format Maintenance window and define the rules.

3. Specify name, description, and whether the conditional format is global. Conditional formats default to Personal for advanced users.

4. Click the Icon button to select the icon to display in the measure item's cell based on satisfying the associated rule. In the example that follows, the green up arrow was selected as part of the first rule.

5. Click the Format button to format the background color and font applied to the measure item cell based on satisfying the associated rule. In the example that follows, a green background and italic font was selected as part of the first rule.

6. Select an operator from the drop down list and enter a numeric value for the rule. In the example that follows, the conditional formatting will be applied when the value is greater than 10000.

7. Continue defining additional rules. In the example that follows, three rules have been defined for the Gross Margin Tracking conditional format.

Conditional Format Maintenance

	Icon	Format			Operator			Value	Options	
⇅	⬆	*1234.10*	Icon	Format	when value is	> ∨		10000	Add	Remove
	🔶	1234.10	Icon	Format	when value is	> ∨		500	Add	Remove
	⬇	~~1234.10~~	Icon	Format	for all other values					

General

Name: Gross Margin Tracking
Description:
Type: Global   Pre-fill Icons

Display the following icons and formats according to these rules:

8. Save ⊟ the conditional format.

Delete a Conditional Format

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

2. In the Conditional Format list window, select the desired conditional format and click Delete ⊗.

Note: Casual users cannot edit or delete any conditional formats. Advanced users can edit and delete only their own personal conditional formats. View and security administrators can create, edit, delete, and use personal and global conditional formats including editing and deleting other user's conditional formats.

Edit a Conditional Format

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

2. In the Conditional Format list window, select the desired conditional format and click Edit 🖊.

    OR

2. Double click on the conditional format to open the Conditional Format Maintenance window.

3. Make the necessary edits to the conditional format name, description, and rules. Administrators also can edit the owner of a conditional format using the Owner property. Clicking the Browse button ⊡ for the property opens a Select User Window for changing the owner.

4. Click Save ⊟.

Note: Casual users cannot edit or delete any conditional formats. Advanced users can edit and delete only their own personal conditional formats. View and security administrators can create, edit, delete, and use personal and global conditional formats including editing and deleting other user's conditional formats.

Conditional Format Using Indicator Only

The view below has a conditional format applied to the Gross Margin Amount measure item that displays the indicator only. This measure item also has been defined with a pop-up label that displays the Gross Margin Amount value as well as the criteria associated with the conditional format.

View Name: *Product Sales, Returns, Margins*

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	↓
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	↓
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	↗
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	↗
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	↓
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	↓
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	↗
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	↓
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)		
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)		Gross Margin is $16,649. Green arrows indicate margins above
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)		$10,000. Yellow arrows indicate margins between $5,000 and
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)		$10,000. Red arrows indicate margins below $5,000.
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445	↑
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608	↓
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054	↗
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597	↑
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135	↓
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419	↓
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868	↑
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547	↑

Conditional Format using Indicator and Value

The view below has a conditional format applied to the Gross Margin Amount measure item that displays indicator icons. The Gross Margin Amount value displays in addition to the indicator icons.

View Name: *Product Sales, Returns, Margins*

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725 ⬇	$2,787
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663 ⬇	$1,580
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406 ⬈	$7,732
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423 ⬈	$5,099
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443 ⬇	$3,909
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053 ⬇	$3,785
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530 ⬈	$5,304
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551 ⬇	$4,638
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)	$13,161 ⬇	$4,860
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)	$14,362 ⬈	$5,534
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)	$20,638 ⬈	$6,458
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)	$31,181 ⬈	$8,207
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445 ⬆	$16,649
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608 ⬇	$2,444
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054 ⬈	$7,829
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597 ⬆	$32,383
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135 ⬇	$1,289
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419 ⬇	$1,877
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868 ⬆	$14,192
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547 ⬆	$12,439

Conditional Format using Font and Cell Coloring

The view below has a conditional format applied to the Gross Margin Amount measure item that uses font and cell coloring to highlight margins below a desired target of $5,000.

View Name: *Product Sales, Returns, Margins*

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	$2,787
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	$1,580
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	$7,732
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	$5,099
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	$3,909
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	$3,785
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	$5,304
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	$4,638
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)	$13,161	$4,860
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)	$14,362	$5,534
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)	$20,638	$6,458
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)	$31,181	$8,207
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445	$16,649
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608	$2,444
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054	$7,829
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597	$32,383
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135	$1,289
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419	$1,877
FrtCktail LS 12 oz BR* 0A	$49,061	($4,575)	$34,868	$14,192
FrtCktail 6oz LnchPk BR* 0A	$49,986	($6,366)	$37,547	$12,439

Color Window
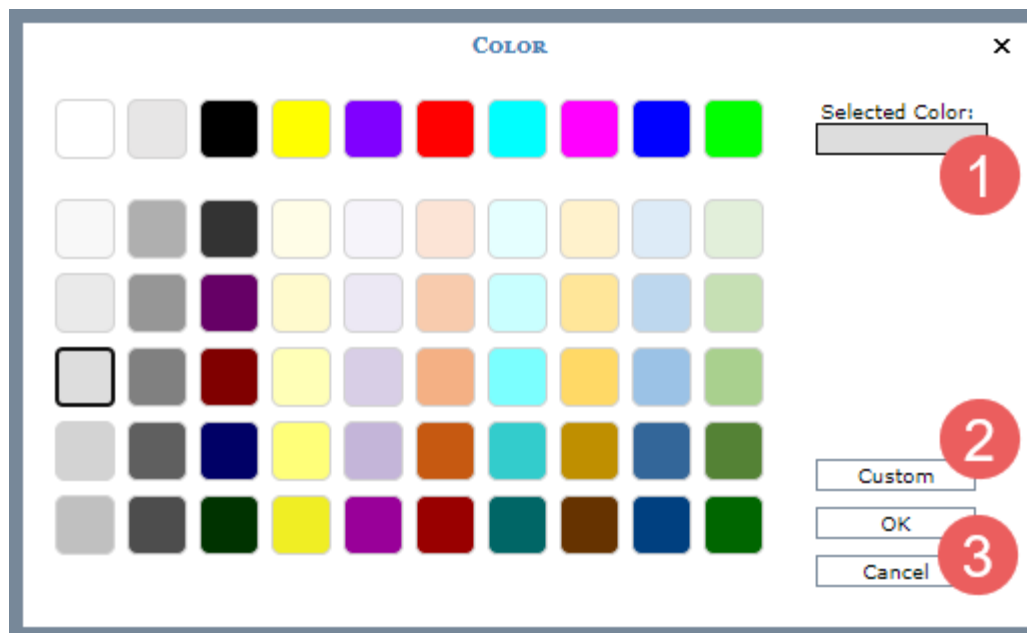
1	**Selected Color** – The color selected from the basic color palette displays here.
	A variation on the Color window shown above displays when you are working in Application Options to choose colors for groups in the Stratum View Pane and when you are working with the fill color for individual columns of measure items, levels, or attribute relationships in a view. That version of the window is used to either assign a background color to groups or to control the fill color for columns in the grid respectively. Users click a color to select one or click the No Color checkbox to remove all color. The No Color 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.

COLOR **×**	
Selected Color:	
Basic	
OK	
Cancel	
Hex: #5FFFCA	
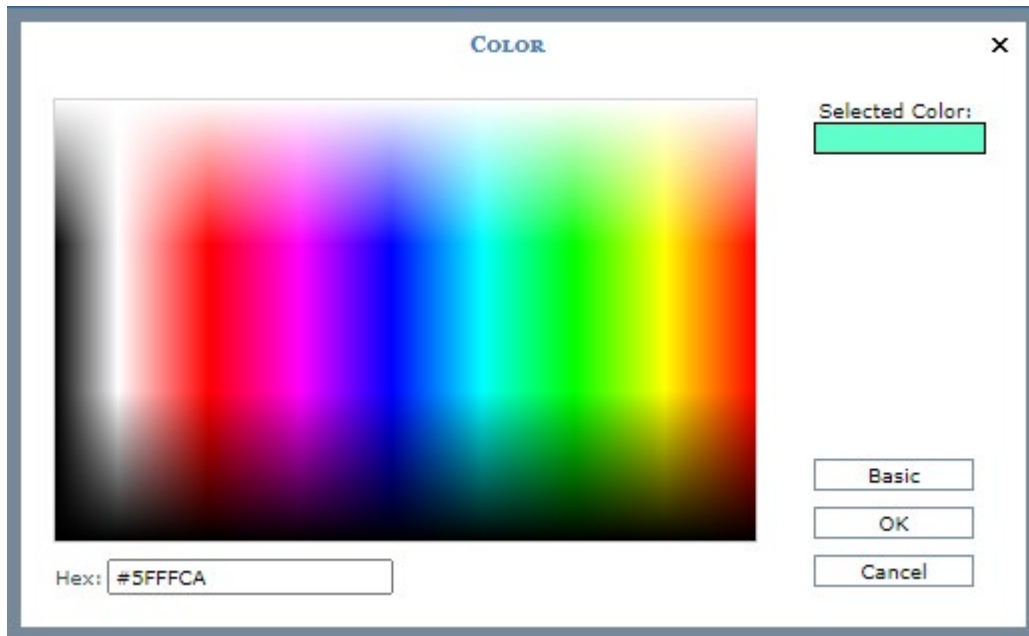
③	**OK** – Click OK to accept your color selection and close the window.
	Cancel – Click Cancel to ignore any selections and close the window.

Conditional Format List Window

The Conditional Format list window is accessed from the main menu in the top panel of Stratum (click Manage Things then Conditional Format). Below is the Conditional Format list window.

Conditional Format

Name ▲	Type	Last Used
ASP >= $25	Personal	05/13/2016 15:47:31
Cost Exceeding Sales	Global	04/13/2016 15:12:27
Customer Percent of Total	Personal	
Freight Cost Difference	Global	03/15/2018 16:31:52
Google	Global	05/12/2016 13:03:26
Gross Margin Tracking	Global	02/26/2018 10:00:56
Gross Margin Tracking for Product	Global	
Inventory Nearing Expiration Date	Personal	
Map It	Global	05/12/2016 13:03:26
Percent of Total Growth	Global	03/26/2018 13:40:13
Percent of Total Growth with Cell Coloring	Global	03/06/2018 09:13:45
Sales less than 100K	Global	03/26/2018 16:33:13
Sales TY vs LY	Global	05/12/2016 13:32:40
Sales vs Budget Indicator	Personal	08/14/2012 17:49:40
Sales vs Budget Indicator New	Global	03/23/2018 14:48:08

1 to 15 of 15

1	**Toolbar Icons** – • **New** – Click to define a new conditional format. • **Edit** – Click to edit an existing conditional format. • **Delete** – Click to delete the selected conditional format(s) with confirmation. • **Display Options** – Click to adjust the information that displays on the Conditional Format list window. • **Help** – Click to access help that is specific to conditional formats. **Paging Controls** – Use the paging arrows to move between pages of conditional formats. Controls are active only when there are multiple pages to scroll through.
2	**Name** – The window lists all conditional formats that the user has access to and allows them to create new ones or edit existing ones. For advanced users, all global and the user's personal conditional formats are listed here. For View and security administrators, all conditional formats are listed. Double clicking on a name opens the Conditional Format Maintenance window for editing.
3	**Type** – Whether the conditional format is global or personal displays here. View and security administrators can create and edit global and personal conditional formats as well as edit and delete other user's conditional formats. Advanced users can create and edit their own personal conditional formats. **Last Used** – The date and time of when the conditional format was last used in a view is displayed here.

Additional details about the conditional can be displayed in this list window. Click the Display Options icon and choose the other information to display about the conditional formats.

Conditional Format Maintenance Window

	Toolbar Icons –
1	• **New** – Click to clear the Conditional Format Maintenance window and set up a new conditional format.
	• **Save** and **Save As** – Click the respective buttons to save the active conditional format or create a new format from the active format. The Save button will be disabled in certain cases, such as for advanced users who are viewing properties of a global conditional format. They cannot save changes to global conditional formats, but can use the Save As button to create a new format from that currently displayed format.
	• **Delete** – Click to delete the conditional format. You will be prompted to confirm the deletion.
	• **Exit** – Click to exit this window and return to the Conditional Format list window.
	• **Help** – Click to access help that is specific to conditional formats.
2	**General Properties** – Use this section to specify the name and description for the conditional format. The Type property is used to make a conditional format personal or global. View and security administrators can create / maintain global conditional formats. Advanced users, view administrators,

and security administrators can create / maintain personal conditional formats. Global conditional formats may be used with any type of view – global, personal, or shared views. Personal conditional formats also can be used with global, personal, or shared views.

3	**Pre-fill Icons** – Takes you to the [Select Icon Set window](#) where you can select an icon set to pre-fill the rules and icons for the conditional format.
4	**Icon** – This is the icon that will display in the measure item's cell based on satisfying the associated rule. Click on the Icon button to open the [Select Icon window](#). The Percent of Total Growth conditional format in this example has 3 rules. 1. Display a green up arrow when the measure item value is >= .0001. 2. Display a yellow horizontal arrow when the measure item value is between .00001 and 0. 3. Display a red down arrow with yellow cell coloring for all other values. **Format** – This is the cell and text formatting that will be applied to the measure item cell based on satisfying the associated rule. Click on the Format button to access the [Select Format window](#). The Percent of Total Growth conditional format in this example includes yellow background coloring for the "for all other values" rule.
5	**Operator and Value** – Select an operator from the drop down list and enter a value for the rule. Available operators are =, < >, <, <=. >, >=. The value must be numeric.
6	**Options** – You can add or remove rules within the conditional format.
7	**Attributes** – This section shows the attributes of the conditional format, including when it was last updated and last used. When you create, update, or use a conditional format, this information is automatically updated by Stratum.Viewer. The Owner property in the Attributes section can be used by administrators to change the owner of a conditional format. Administrators can click the Browse button ⬚ next to the property and use a [Select User window](#) that opens to change the owner.

Custom Conditional Format Window

This window has similar functionality as the Conditional Format Maintenance window.
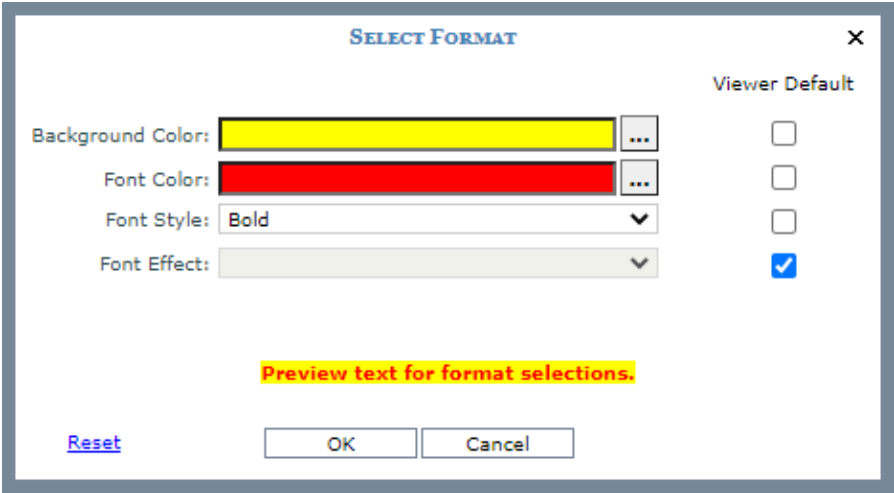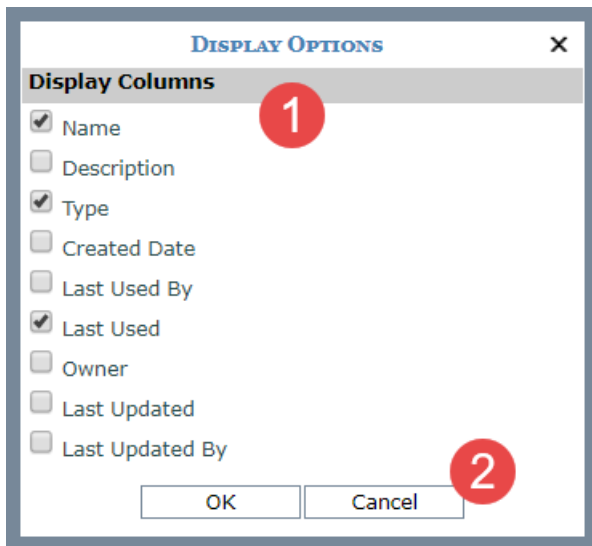

| | | | Name and Description – Specify the name and description for the custom conditional format. The name will be displayed in the Conditional Format text box left of the Browse button ⋯ within a measure item Properties window. |

1 — **Name and Description** – Specify the name and description for the custom conditional format. The name will be displayed in the Conditional Format text box left of the Browse button ⋯ within a measure item Properties window.

2 — **Pre-fill Icons** – Takes you to the Select Icon Set window where you can select an icon set to pre-fill the rules and icons for the custom conditional format.

3 — **Icon** – This is the icon that will display in the measure item's cell based on satisfying the rule. Click on the Icon button to open the Select Icon window. The YTD Sales custom conditional format in this example has 2 rules.

1. Display a blue check when the measure item value is greater than or equal to 10000000.

2. Apply yellow cell coloring and red bolded text for all other values.

Format – This is the cell and text formatting that will be applied in the measure item's cell based on satisfying the rule. Click on the Format button to access the Select Format window. The custom conditional format in this example includes a yellow background with red, bold font for the "for all other values" rule.

④	**Operator and Value** – Select an operator from the drop down list and enter a value. Available operators are =, < >, <, <=. >, >=. The value must be numeric.
⑤	**Options** – You can add or remove rules for the conditional format.
⑥	**Select or Custom** – The Select and Custom buttons switch between the two modes of the window. The Custom Conditional format window has the Select button available so that you can switch to the Select Conditional Format window. Clicking Select will remove the custom conditional format with confirmation. The Select Conditional Format window will display without any conditional format selected. **OK** – Click to save any edits made on this window and close the window. **Save As –** A custom conditional format can be saved as a conditional format. **Cancel** – Closes the window without adding the custom conditional format to the active measure item.

Display Options Window for Conditional Format List Window

1	**Display Columns** – Select or deselect columns to control the information that displays on the Conditional Format List window. For example, display the name of the conditional formats, the type of global or personal, and the dates the conditional format was last used. The Created Date, Last Used By, Last Used, Owner, Last Updated are system information about the conditional format owner and the date and time when the conditional format was last used in a view.
2	**OK** - Clicking OK applies the changes for the current session only in the Conditional Format List window. If you navigate away from the windows, display columns return to their defaults.

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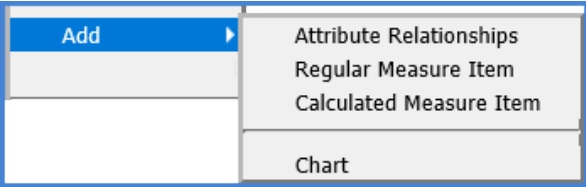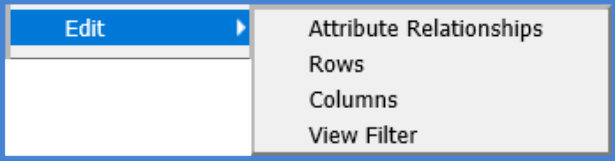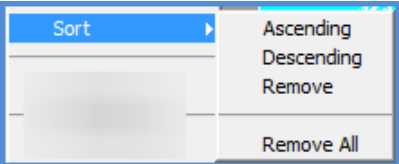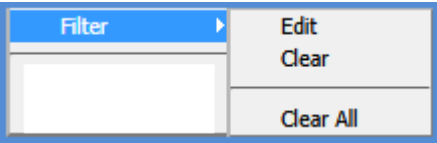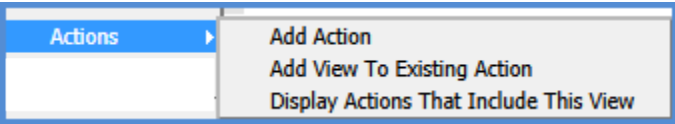
Right-click objects in views to display available functionality for them such as inserting measure items, transposing the grid, filtering objects in the grid, and so forth. Many of the functions can also be controlled through view explorer and the Properties window, giving you several ways to make changes.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

1	**More Info** – Opens more details about the attribute relationship in the Stratum Glossary.
2	**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.
3	**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.

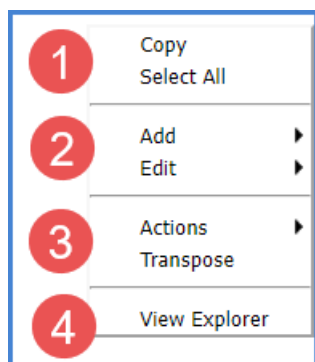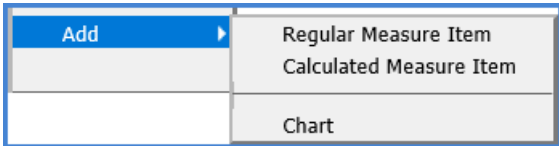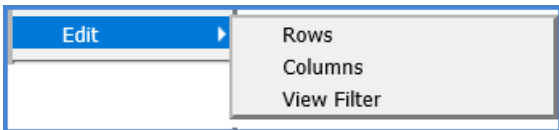|	
	Add menu showing: Attribute Relationships, Regular Measure Item, Calculated Measure Item, Chart
	Edit - Edit the attribute relationships or edit hierarchies on the rows, columns, or view filter.
	Edit menu showing: Attribute Relationships, Rows, Columns, View Filter
4	**Hide** - When an attribute 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.
5	**Sort** - Sort options are Ascending, Descending, Remove, and Remove All. **Sort** menu showing: Ascending, Descending, Remove, Remove All **Filter -** Filter options are Edit, Clear, and Clear All. **Filter** menu showing: Edit, Clear, Clear All
6	**Actions** – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view. **Actions** menu showing: Add Action, Add View To Existing Action, Display Actions That Include This View **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.
7	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close. **Properties -** Click to maintain the attribute relationship properties including sorting and whether it is visible or not.

Axis Pop-up Menu

Right-click 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.
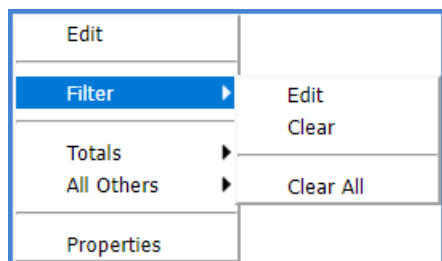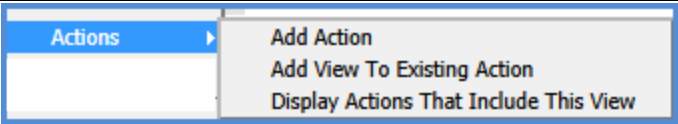

General Pop-up Menu

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

1	**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 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 hierarchies on the rows, columns, or view filter.
3	**Actions** – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.

	Transpose - Use this option to change the axis for levels and measure items in the grid. Objects displayed in rows are switched to display in columns and vice versa.	
4	**View Explorer -** This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.	

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

Measure items can be assigned to one axis, either rows or columns. Right-click the caption of a measure item in a detail row or column to display actions that you can take related to that object, such as inserting additional measure items or applying conditional formats.
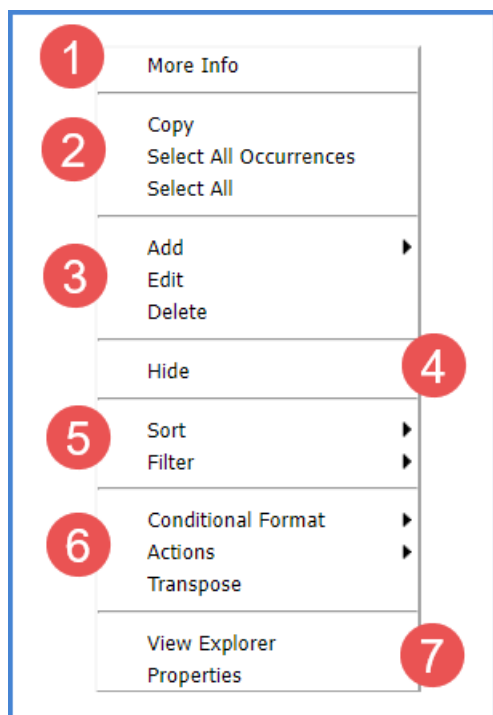
Or, right-click the caption of a measure item in a Grand Total row or column to work with values in that area of a view, such as by applying sorts and filters to them.

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

1	**More Info** – Opens more details about the measure item in the Stratum Glossary.
2	**Copy** - This option allows you to copy sections of a view that you have selected. **Paste -** Allows you to paste data into update enabled cells. This option only shows in planning enabled views. This option does not display on the menu for Grand Totals. **Select All Occurrences** - Use this option to select data for all occurrences of that measure item in the active page of the View. This option does not display on the menu for Grand Totals. **Select All -** Use this option to select the entire grid.

③ **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.

Add ▶	Regular Measure Item
	Calculated Measure Item
	Chart
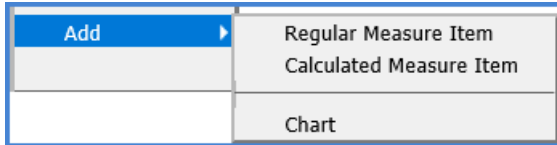
Edit - For regular measure items, opens the Edit Measure Item window with that measure item selected for editing. You can edit that measure item or any other regular measure items. For calculated measure items, opens an Edit window where you can edit the calculation, caption, and format for the calculated measure item.

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.

Delete - Deletes the measure item from the view definition without confirmation. It will no longer display in the view explorer.

④ **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.

⑤ **Sort** - Sort options are Ascending, Descending, Clear, and Clear All.

Sort ▶	Ascending
	Descending
	Clear
	Clear All

Filter - Filter options are Edit, Clear, and Clear All.
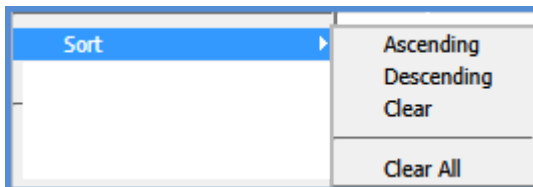
Filter ▶	Edit
	Clear
	Clear All
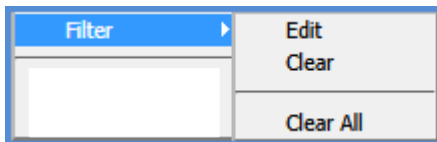
⑥ **Conditional Format –** Use this option to edit or add conditional formatting on the measure item. There are also options for clearing the conditional format on the active measure item or all measure items.

Conditional Format ▶	Edit
Actions ▶	Clear
Transpose	Clear All

Actions – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.

Actions ▶	Add Action
	Add View To Existing Action
	Display Actions That Include This View

		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.
	7	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.
		Properties - Click to maintain the measure item properties including the name, caption expression, type, pop-up labels, hyperlinks, and so forth.

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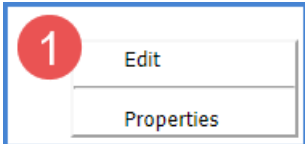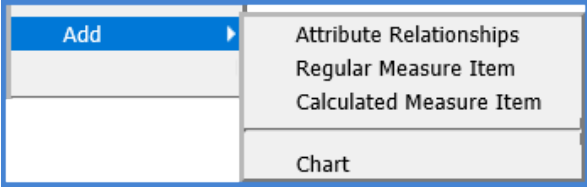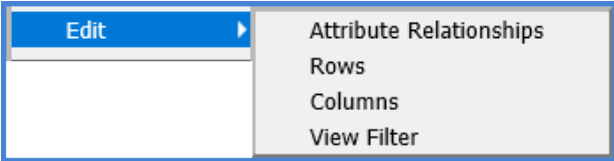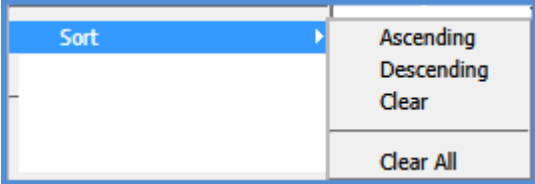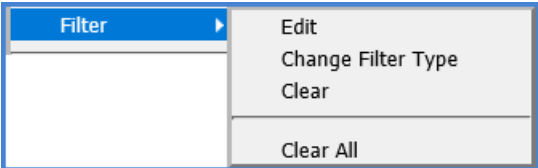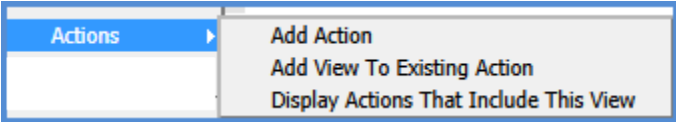
1	**Edit** - Edit the hierarchies in the view filter. A shortcut to adding hierarchies to the View Filter is to click the Add icon ✚ that's provided in the View Filter section of the view.

Levels Pop-up Menu

Right-click the level to display actions that you can take related to the level, such as editing the hierarchy.
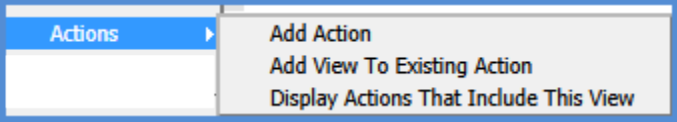
1	**More Info** – Opens more details about the level in the Stratum Glossary. If you right-click a level's member and choose More Info, you will see more details about that member such as its value and attribute relationships for the level.
2	**Copy** - This option allows you to copy sections of a view 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.

③	**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.

Add ▶	Attribute Relationships
	Regular Measure Item
	Calculated Measure Item
	Chart

Edit - Edit the attribute relationships or edit hierarchies on the rows, columns, or view filter.

Edit ▶	Attribute Relationships
	Rows
	Columns
	View Filter

④	**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.

⑤	**Sort** - Sort options are Ascending, Descending, Clear, and Clear All.

Sort ▶	Ascending
	Descending
	Clear
	Clear All

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.

Filter ▶	Edit
	Change Filter Type
	Clear
	Clear All

⑥	**Actions** – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view.

Actions ▶	Add Action
	Add View To Existing Action
	Display Actions That Include This View

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.

⑦	**View Explorer** - This option allows you to open and close view explorer. If the Properties window is open when you close view explorer, the Properties window will also close.

Properties - Click to maintain the level properties including the filter, sort, totaling, visibility, and display text. |

View Name Pop-up Menu

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

1	**Delete** - Choose Delete to delete the view with confirmation. Anyone can delete their own personal views, but only view and security administrators may delete global views.
2	**Actions** – Use this option to add new actions, add the active view to existing actions, or display the actions that include the active view. **Excel** - Click to initiate an export of the view to Microsoft Excel. **Print** - Click to print the active page of the view. **Share** – Click to open a window with the URL for the view. Click Copy to copy the URL to use for sharing with other Stratum users.
3	**Properties** - Click to maintain the view properties including the name, description, type and view group.

Properties Windows for Individual Measure Items

Regular Measure Items

1	**Name** – The text in this field determines the unique name that Stratum.Viewer will use to identify a measure item in the view. You can edit this field as needed. Default names given to new measure items are DataN. The "N" is a sequential number assigned by Stratum.Viewer to create a unique name. You will be prompted to make corrections to the name if you enter a duplicate name, use any spaces in the name, use too many characters (more than 50), or use invalid characters.
	Caption Expression - A read only field that shows the expression behind the caption for a measure item. The resolved text generated by the expression creates the caption, which is the text that displays for the measure item in the view and other areas of the application such as view explorer. The Caption Expression window can be accessed for editing the expression by clicking the Browse button next to the field.
2	**Type** – This property shows the type of measure item you are working with – either regular, calculated, or distinct calculated. The property will be set to "Regular" if you are inserting or editing a regular measure item.
	Note: See the next table for information about calculated and distinct calculated types.
	Measure – This field is a read only field that displays the underlying measure you selected when setting up the regular measure item.
	• For measure items with time ranges, clicking the Browse Button [...] next to the Measure field opens the Edit Measure Item window. Use that window to edit the measure item's

	underlying measure or time range. The main Time Range property for a view must be set to Yes for the Properties window to behave in this manner.
	• For measure items without time ranges, clicking the search button 🔍 next to the Measure field opens the Select Measure window for editing the underlying measure. The main Time Range property for a view must be set to No for the Properties window to behave in this manner.
③	**Format String** – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting. **Fill Color** – Assign a fill color that will be used in the column or row containing the measure item. This makes it stand out from the rest of the grid. Click the Browse button 〔···〕 next to the Fill Color property to choose a color from the Color window. Or, if there is already a color selected and you don't want a fill color used anymore, select the No Color checkbox.
④	**Show Value –** Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item. **Display Value As** – This drop-down list only displays for measure items with time ranges. This property defaults to Sum, and its other options can be used to create Key Performance Indicators (KPIs) based on the selected measure. • **Sum** - The sum of the values for the measure item within the specified time range. This is the default and most commonly used setting for this property. • **Min** - The minimum value for the measure item within the specified time range. • **Max** - The maximum value for the measure item within the specified time range. • **Avg** - The average value for the measure item within the specified time range. • **Med** - The median value for the measure item within the specified time range. • **StdDev** - The Standard deviation of the measure item values within the specified time range. The standard deviation is the average amount of variability in your dataset. It tells you, on average, how far each value lies from the mean. • **Variance** - The measure of dispersion of data points from the mean for measure item values within the specified time range. Low variance indicates that data points are generally similar and do not vary widely from the mean. High variance indicates that data values have greater variability and are more widely dispersed from the mean. **Show Image** – This property is used when setting up calculated measure items that display images. See the next table for information about this property.
⑤	**Conditional Format** – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. The Browse button 〔···〕 is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create a new one. The name of the selected conditional format displays in the text box left of the 〔···〕 icon. **Pop-up Expression** – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse button 〔···〕 is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or create a new one. The active pop-up expression displays in the text box left of the 〔···〕 icon. **Hyperlink** – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse button 〔···〕 is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the

	button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the [...] icon.
6	**Visible** – Set this property to No to hide the measure item in the view. Set this property to Yes to display the measure item in the view.
7	**Filter and Sort** – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied. If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.
8	**Total** – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total. • **None** – No total will be displayed. • **Total** – This designation takes into account any underlying calculations for a measure item's definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value. • **Sum** – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any of the underlying calculations that Viewer performs to be used when generating total values. You might choose to use a Sum total when a measure item calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.
9	**Drilldown View** - Assign a drilldown view if you want to drill from this measure item to another view, for example, to a view with related or complimentary data to the originating view. Choose from views that you normally have access to in the application. If you select a Drilldown view for both the measure items axis and an individual measure item, the selection for the individual measure item takes precedence.

Calculated and Distinct Calculated Measure Items

1	**Name** – The text in this field determines the unique name that Stratum.Viewer will use to identify a measure item in the view. You can edit this field as needed. Default names given to new measure items are DataN. The "N" is a sequential number assigned by Stratum.Viewer to create a unique name. You will be prompted to make corrections to the name if you enter a duplicate name, use any spaces in the name, use too many characters (more than 50), or use invalid characters.
	Caption Expression – A read only field that shows the expression behind the caption for a measure item. The resolved text generated by the expression creates the caption, which is the text that displays for the measure item in the view and other areas of the application such as view explorer. The Caption Expression window can be accessed for editing the expression by clicking the Browse button next to the field.
2	**Type** – This property shows the type of measure item you are working with – either regular, calculated, or distinct calculated. The property will be set to "Calculated" or "Distinct Calculated" if you are inserting or editing that type of measure item.
	Note: See the previous table for information about regular types.
	Expression – When "Calculated" or "Distinct Calculated" is the measure item type, an Expression field shows in this window. It's a read only field that shows the expression for calculating the measure item. The Expression window can be accessed for editing the expression by clicking the Browse button ⊡ next to the field. Note that when you are using a calculated measure item to display images in a view that the expression will determine the location/name of the image file for Stratum.Viewer to display.

	• The image file must reside in the Stratum.Viewer application folders. It is recommended that all custom images reside in a subfolder of the Images folder of the Stratum.Viewer application. • Supported file types for images are *.jpg, *.jpeg, *.png, *.bmp, *.gif, *.tif, and *.tiff. • The image will display according to its original, default size.
3	**Format String** – Use this drop-down list to apply a format such as decimal places, monetary symbols, commas, or a combination of formatting. **Fill Color** – Assign a fill color that will be used in the column or row containing the measure item. This makes it stand out from the rest of the grid. Click the Browse button [...] next to the Fill Color property to choose a color from the Color window. Or, if there is already a color selected and you don't want a fill color used anymore, select the No Color checkbox.
4	**Show Value –** Determines if the measure item value displays in the Viewer grid. Set to Yes to display value. Set to No to hide the value, for example, in cases where you want to display only the conditional format icon for a measure item. **Show Image** – This property is used when setting up calculated measure items that display images. You use the Expression window to define the location of the image and then set this property to Yes in order for the defined image to display in the grid. See item 2 above.
5	**Conditional Format** – Controls the display of icons, and cell and text formatting for the measure item by applying the conditional format rules. The Browse button [...] is only enabled when the Conditional Format field is set to Yes. When enabled, you can click the button to access the Select Conditional Format window to edit the conditional format associated with the measure item or create a new one. The name of the selected conditional format displays in the text box left of the [...] icon. **Pop-up Expression** – Use this property to specify whether the selected measure item has a pop-up label that will display when you hover over the measure item value, indicator, or image. The Browse button [...] is only enabled when the Pop-up Expression field is set to Yes. When enabled, you can click the button to access the Pop-up Label Expression window to edit the existing expression or create a new one. The active pop-up expression displays in the text box left of the [...] icon. **Hyperlink** – Choose Yes if you want a hyperlink defined for the cell of a measure item. The Browse button [...] is only enabled when the Hyperlink field is set to Yes. When enabled, you can click the button to access the Hyperlink Expression window to edit the expression or create a new one. The hyperlink defined displays in the text box left of the [...] icon.
6	**Visible** – Set this property to No to hide the measure item in the view. Set this property to Yes to display the measure item in the view.
7	**Filter and Sort** – Use to add, edit, or remove filters and sorts. For filters, select the operator from the drop-down list and enter the value to filter by in the field next to the list. Pop-up labels showing filter criteria will show for the Filter field after a filter has been applied. If your view has levels on the same axis as measure items, these properties will be disabled until you have applied an initial filter or sort via the grid.
8	**Total** – Use to control the type of total that is performed for a measure item. The default setting for all measure items is Total. • **None** – No total will be displayed.

	• **Total** – This designation takes into account any underlying calculations for a measure item's definition when generating Grand Totals, sub-totals, and All Others – such as calculations defined in a measure item expression or associated with a Stratum.Planner calculated value. • **Sum** – This designation means that Viewer will generate totals by adding the values displayed in measure item detail cells. That summing will be used to generate the Grand Totals, sub-totals, and All Others. This type of total is intended for special cases where you don't want any of the underlying calculations that Viewer performs to be used when generating total values. You might choose to use a Sum total when a measure item calculation includes an IIF statement, such as a calculation with IF, Then, Else conditions.
9	**Include In Relationship Filter** – Defaults to No and is recommended in most cases for optimizing calculations, especially those use include attribute relationships in their expressions. That default makes for the most efficient calculation performance and gives you a more focused result set. The default makes sure the calculation is only carried out for members in the view that have data for the applicable measure item used in the calculation.
10	**Drilldown View** - Assign a drilldown view if you want to drill from this measure item to another view, for example, to a view with related or complimentary data to the originating view. Choose from views that you normally have access to in the application. If you select a Drilldown view for both the measure items axis and an individual measure item, the selection for the individual measure item takes precedence.

Save Conditional Format As Window

1	**Name and Description** – Specify the name and description for the conditional format.
2	**Type** – Controls whether the conditional format will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
3	**Save** – Click to save the conditional format and close the window. **Cancel** – Click to close the window without saving a conditional format.

Save Custom Conditional Format As Window

1	**Name and Description** – Specify the name and description for the conditional format. The Save Custom Conditional Format As window provides the ability to create a new conditional format that can be used in other views from a custom conditional format. This will no longer be a custom conditional format created on-the-fly, but saved as a regular conditional format. The name and description will default from the custom conditional format.
2	**Type** – Controls whether the conditional format will be global or personal. Type defaults to Personal and is disabled for advanced users. Administrators can set the Type to Global or Personal.
3	**Save** – Click to save the conditional format and close the window. **Cancel** – Click to close the window without saving a conditional format.

Select Conditional Format Window

Main Window Sections

1	**Selected Conditional Format –** If a conditional format has been selected, the name of it displays here.
2	**Available Conditional Formats** – Click a conditional format then OK to apply it to a measure item.
	• This is a list of all formats that meet search and filter criteria. You can search to find formats with a particular name or use the filter tool to look up formats of only certain users (See Search and Filter Features). You can use the Show Details section to look up format properties and rules.
	• To sort the displayed formats, 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 formats are displayed in the window. There are paging arrows to move between pages of formats. Arrows are active only when more formats exist than can be displayed in a single page of this section.
	1 to 27 of 27 ◄◄ ◄ 1 ► ►◄

③	**Custom –** Click Custom if you need to switch to the Custom Conditional Format window, which is used to define a custom conditional format for the selected measure item. Custom conditional formats are for one time use. They cannot be reused. Pre-defined formats that show in the Select Conditional Format window can be reused across different views. **OK –** Click OK to apply the conditional format selection made in this window and to close the window. **Cancel –** Click Cancel to close the window without applying your selection.

Search and Filter Features

Optionally use the search and/or filter features (section marked '4' in following image) to look for particular conditional formats.
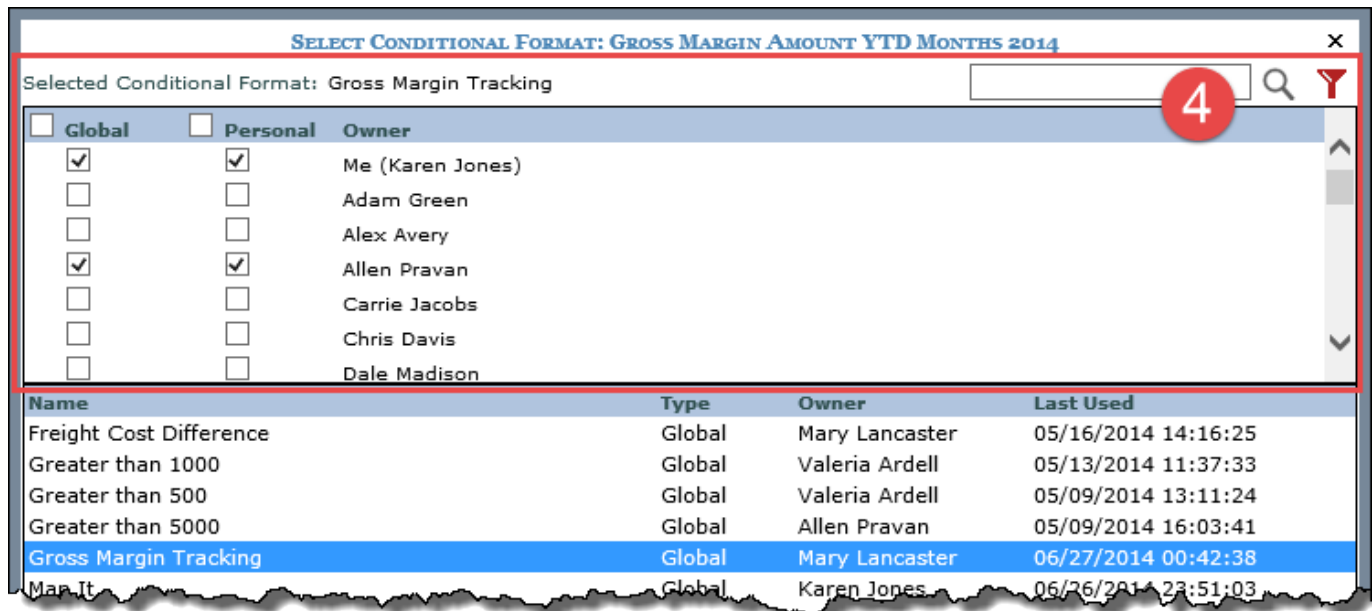
- **Search** – Enter all or part of the name(s) of the format(s) you are searching for and then click the Search button to execute the search.

- **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 formats 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 formats of all users at one time (for example, if the Personal heading checkbox is selected, all Personal formats 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 format that is actively selected in the window. Select a format and then click the Show Details ∧ button. Click the Hide Details ∨ button to hide the section. You can see the description of the format and the Icon, Format, Operator, and Value of each rule in the format definition.

| Sales vs Budget Indicator | | Personal | Mary Lancaster | 04/07/2014 13:24:56 |

1 to 10 of 10 |◄ ◄ 1 ► ►|

Description: Indicators to track various margin levels

Icon	Format	Operator	Value
⬆	*1234.10*	when value is >	10000
↘	1234.10	when value is >	5000
⇨	1234.10	when value is >	1500
↗	1234.10	when value is >	500
⬇	~~1234.10~~	for all other values	

| Custom | | OK | Cancel |

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

Select Format Window For Conditional Formats

SELECT FORMAT   ✕

Viewer Default

Background Color: [yellow] [...]   ☐

Font Color: [red] [...]   ☐

Font Style: Bold ▾   ☐

Font Effect: [ ] ▾   ☑

Preview text for format selections.

Reset   OK   Cancel

1	**Background Color**– Defines the background color for the conditional format rule. If Viewer Default is selected, then Viewer background colors will be used. If Viewer Default is not selected, then use the Browse button [...] to choose the background color for the rule. The text box to the left will display the selected color.
	Font Color – Defines the font color for the rule. If Viewer Default is selected, then Viewer font colors will be used. If Viewer Default is not selected, then the use the Browse button [...] to choose the font color for the rule. The text box to the left will display the selected color.
2	**Font Style** – Defines the font style for the rule. If Viewer Default is selected, then Viewer font styles will be used. If Viewer Default is not selected, then use the drop-down list to choose a font style for the rule. Valid options are: Regular, Italic, Bold, and Bold Italic.
	Font Effect - Defines the font effect for the rule. If Viewer Default is selected, then Viewer font effects will be used. If Viewer Default is not selected, then use the drop-down list to choose a font effect for the rule. Valid options are: None, Underline, Overline, and Strikethrough.

③	**Preview Text** – The text displayed here is formatted to show an example of the formatting you have selected. **Reset** – Click to reset the window to use Viewer defaults, which means the Viewer Default checkboxes will be selected for all properties and any custom selections will be removed. **OK** – Click to save any edits made on this window and close the window. **Cancel** – Click to close the window without making any changes.

Select Icon Window

①	**Icon Sets** – An icon set is a group of related icons. Once an icon set is selected, all icons included in that set display on the right side of the window and are available for selection. A predefined icon set directory, subfolders and icons are included with your Stratum.Viewer installation to support the conditional formatting functionality. If additional icons are required, they can be added. All custom icons must reside in a subfolder of the Images / Icons folder of the Stratum.Viewer application. Valid file types are *.png, *.jpg, *.gif, *.tif, *.tiff, and *.bmp.
②	**Icons** – All available icons in the selected icon set display here with the icon selected for the active rule highlighted. Click an icon to select it for a conditional format rule.
③	**OK** – Click to save any edits made on this window and close the window. **Cancel** – Click to close the window without making any changes.

Working with Conditional Formats

	Clear Icon – Click to clear the icon selected for the active rule with confirmation.

Select Icon Set Window

①	**Icon Sets** – An icon set is a group of related icons. Once an icon set is selected, all icons included in that set display on the right side of the window.
②	**Icons** – All available icons in the selected set display here. The icons will pre-fill the rules and icons for a conditional format. For example, if the icon set "5 Arrows – Gray" is selected, then 5 rules will be created and prefilled with the icons from the set.
③	**OK** – Click to select the icon set to be used to pre-fill the rules and icons for the conditional format. **Cancel** – Click to close the window without selecting an icon set.

Select User Window

Main Window Sections

1	**Selected User** – The name of the user actively selected in the window displays here.
2	**Available Users** – Click a user then OK to select the user who will be an item owner. • By default, all users of all access types (casual, advanced, view administrator, or security administrator) except broadcast users will display in the window. You can search to find a user with a particular name or use the filter tool to look up only certain users (See Search and Filter Features). • To sort this list of users, click the First Name, Last Name, Accessibility Level, or User Group column heading. Click a sort icon to change between ascending ▲ and descending ▼ order. To rearrange the list, 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), there is a count of how many users are displayed in the window. 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. 1 to 27 of 27 ◄◄ ◄ 1 ► ►◄

③	**OK** – Click OK to apply the user selection made in this window and to close the window. **Cancel** – Click Cancel to close the window without applying your selection.

Search and Filter Features

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

- **Search** – Enter all or part of the name(s) of the user(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 Accessibility Level checkboxes to filter out users by their access level (casual, advanced, view administrator, security administrator). Only users with the levels selected in the filter feature will display in the window.

Note: The filter toggle will be red ⏚ if a filter has been applied. The filter section does not display the Broadcast User level of access because users with a broadcast user level of access cannot own items such as views, actions, and so forth in Stratum.Viewer.

Add Custom Icons for Conditional Formatting

Pre-defined icon sets and icons are included with your Stratum.Viewer installation to support the conditional formatting functionality. All conditional format icons must reside in a subfolder of the Images/Icons folder of the Stratum.Viewer application. The files type must be *.png, *.jpg, *.gif, *.tif, *.tiff, or *.bmp.

The Select Icon and the Select Icon Set windows display all the subfolders for the Images/Icon folder. The right hand side of the windows displays all the *.png, *.jpg, *.gif, *.tif, *.tiff, or *.bmp files that exist in the selected folder.

If additional icons sets and icons are needed, they must be added to an appropriate subfolder of the Images/Icon folder of the Stratum.Viewer application. In the example below, a "Silvon Custom" subfolder has been added to the Images/Icon folder of the Stratum.Viewer application. Two files, google.jpg and map.jpg, were added.

Note: The files used by Conditional Formatting will display in the Viewer grid using its original, default size.
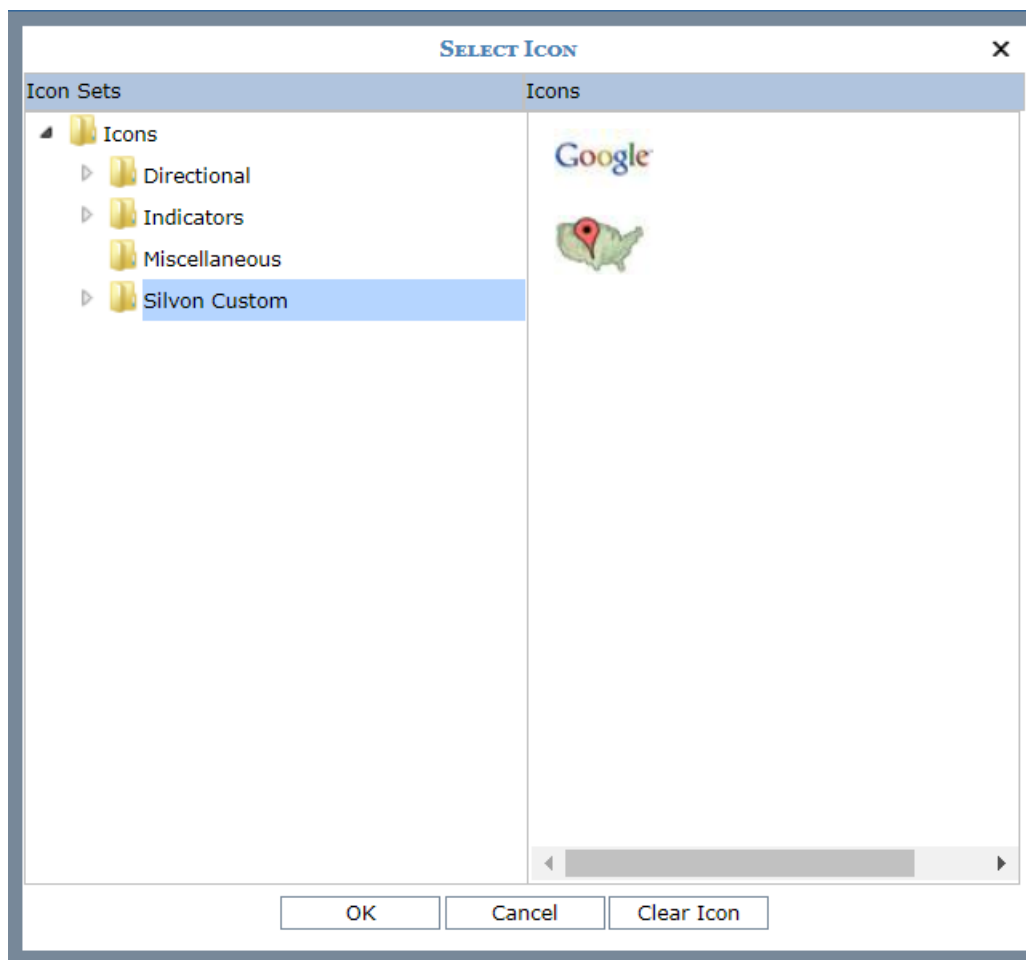
Cell Formatting with Conditional Formats, Hyperlinks, Drilldown Views, and Pop-up Labels

Grid formatting and pop-up label text for a measure item are influenced by the combination of properties you have set up for a measure item and for the Measure Items axis. Contributing factors for formatting are the Conditional Format, Hyperlink, and Drilldown View properties. Contributing factors for pop-up label text are the Pop-up Label Expression, Hyperlink, and Drilldown View properties.

Note: Conditional Format, Hyperlink, and Pop-up Label Expression properties are set up by individual measure items. The Drilldown View property is set up for all measure items via the Measure Items folder in view explorer.

Some properties take precedence over others, which is taken in to consideration by Stratum.Viewer when it displays measure items in the grid. Here are the priorities given to the properties for formatting and pop-up labels. Examples are provided.

Priority for Formatting Properties

1. If a conditional format exists for the measure item, then format the measure item cells based on the Format properties of the conditional format rules (for example the background color, font color, or font weight).

Note: The conditional format takes precedence over hyperlink and drilldown view formatting even if the conditional format rules do not result in any special formatting for a specific cell.

2. Else if hyperlink is defined for the measure item, then format the measure item values in blue underlined text.

3. Else if a drilldown view is defined for the Measure Items axis, then format the measure item values in blue underlined text.

Note: Blue underlined formatting is not applied to any images or indicators displayed for measure items.

Priority for Pop-up Label Text

1. If a pop-up label is defined for the measure item, then display pop-up label text.

2. Else if a hyperlink is defined for the measure item, then display the hyperlink.

3. Else if a drilldown view is defined for the Measure Items axis, then display the text 'Drill To" followed by the name of the drilldown view.

Note: If none of the above properties are used, there won't be a pop-up label when you hover over the measure item in the grid.

Example 1

The marked measure item in this view has a conditional format and hyperlink defined for it. Sales after returns that are less than $15,000display in red, bold text based on the conditional format rules. Since the conditional formatting takes precedent over the hyperlink formatting, there is no visual cue to the user that a hyperlink has been defined for this measure item. However, when the user hovers over the measure item cell, the cursor will change to a link. If you were to remove the conditional format (see second image), then all values for that measure item would display as blue underlined text because of the hyperlink defined for it.

Here is the measure item formatting after the conditional format was removed.

		Last Year	Current Year	Grand Total
	▼ Year Based >>	2013	2014	
Product	**Year Based Months Based-Year Based-Abs Year**			
620A914001	Sales Amount	$16,149	$9,513	$25,661
	Return Amount	($1,023)	($965)	($1,989)
	Sales after Returns	$15,125	$8,547	$23,673
620A914002	Sales Amount	$10,633	$6,243	$16,876
	Return Amount	($604)	($570)	($1,173)
	Sales after Returns	$10,029	$5,674	$15,702
620A914003	Sales Amount	$60,820	$34,138	$94,957
	Return Amount	($3,797)	($3,717)	($7,515)
	Sales after Returns	$57,022	$30,420	$87,443
620A914004	Sales Amount	$34,547	$20,521	$55,069
	Return Amount	($1,705)	($1,788)	($3,493)
	Sales after Returns	$32,842	$18,733	$51,575
620A914008	Sales Amount	$45,228	$25,353	$70,581
	Return Amount	($5,674)	($5,206)	($10,880)
	Sales after Returns	$39,554	$20,147	$59,701
620A914015	Sales Amount	$21,366	$12,838	$34,204
	Return Amount	($1,194)	($1,256)	($2,450)
	Sales after Returns	$20,172	$11,582	$31,754
620A914016	Sales Amount	$34,452	$19,834	$54,286
	Return Amount	($1,572)	($1,424)	($2,996)

View Name: *Sales vs Returns*

View Filter ▼ Months

Example 2

The marked measure item in this view has a pop-up label defined for it. There is also a drilldown view defined via the Measure Items axis. The pop-up label text for the marked measure item is the text from the executed pop-up label expression. For other measures items that don't have a pop-up label defined, the name of the drilldown view shows in the pop-up label (see second image).

Here is the pop-label text for all other measure items, which do not have pop-up labels or hyperlinks defined for them. The name of the drilldown view for the Measure Items axis displays.

Change the Conditional Format's Display Options

Here are the steps for adjusting the information that displays on the Conditional Format list window, followed by an example.

1. From the Conditional Format list window, click the Display Options button to access the Display Options window. Choose information to display as separate columns within the Conditional Format list window by selecting the appropriate checkbox.

   - **Name**: Display the user-defined conditional format name.
   - **Description**: Display the user-defined conditional format description.
   - **Type**: Display the global or personal status of the conditional format.
   - **Created Date**: Display the system date that the conditional format was created.
   - **Last Used By**: Display the user ID of the person who last used the conditional format.
   - **Last Used**: Display the system date that the conditional format was last used.
   - **Owner**: Display the name of the owner/creator of the conditional format.
   - **Last Updated**: Display the system date that the conditional format was last updated and saved.

2. Click OK to close the Display Options window and redisplay the Conditional Format list window with the selected information displayed. In the below example, Name, Global, Created Date, Last Used Date, and Last Updated Date checkboxes were selected on the Display Options window.

Conditional Format

Name ▲	Type	Created Date	Last Used Date	Last Updated Date
ASP >= $25	Personal	07/07/2011 01:43:05	07/03/2014 16:46:30	07/07/2011 01:43:05
Cost Exceeding Sales	Global	07/29/2014 13:45:40		08/05/2014 10:50:18
Freight Cost Difference	Global	07/12/2011 11:47:01	07/28/2014 19:02:50	07/12/2011 11:47:01
Google	Global	06/24/2011 09:39:27	07/28/2014 13:46:20	06/24/2011 09:39:27
Gross Margin Tracking	Global	07/13/2011 19:29:32	08/05/2014 12:57:32	07/13/2011 19:45:36
Inventory Nearing Expiration Date	Personal	03/10/2014 12:49:47		08/05/2014 10:50:44
Map It	Global	06/24/2011 10:15:37	07/28/2014 13:46:20	06/24/2011 10:15:37
Percent of Total Growth	Global	06/20/2011 11:59:38	08/05/2014 10:39:46	06/20/2011 11:59:38
Percent of Total Growth with Cell Coloring	Global	06/20/2011 11:17:16	08/05/2014 10:18:25	06/20/2011 11:17:16
Sales less than 100K	Global	07/28/2014 13:24:45	08/05/2014 15:01:30	07/28/2014 13:24:45
Sales vs Budget Indicator	Personal	07/06/2011 13:28:14	11/26/2013 09:16:29	07/06/2011 13:28:14

Change the Owner of a Conditional Format

View and security administrators can change the owner of any conditional format. The Select User window is used to change the owner.

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

2. From the Conditional Format list window, click the name of the conditional format then click Edit (or double-click the conditional format name).

3. In the Attributes section of the Conditional Format Maintenance window, click the Browse button for the Owner property.

4. In the Select User window, click the name of the new Owner for the view, and then click OK in that window. You can narrow down the users that display for selection in the window using the search and/or filter tools.

5. Click Save .

Use Pre-fill Icons

You can select an icon set to pre-fill the rules and icons for the conditional format. Stratum.Viewer has predefined icon set and icons to choose from. You can also add additional icon sets. Please see Add Custom Icons for Conditional Formatting.

Here are the steps for using pre-filled icons.

1. From the Conditional Format Maintenance window, click the Pre-fill icons window button Pre-fill Icons to open the Select Icon Set window.

2. Highlight the icon set folder you want. The icons included in that icon set will display in the right side of the window.
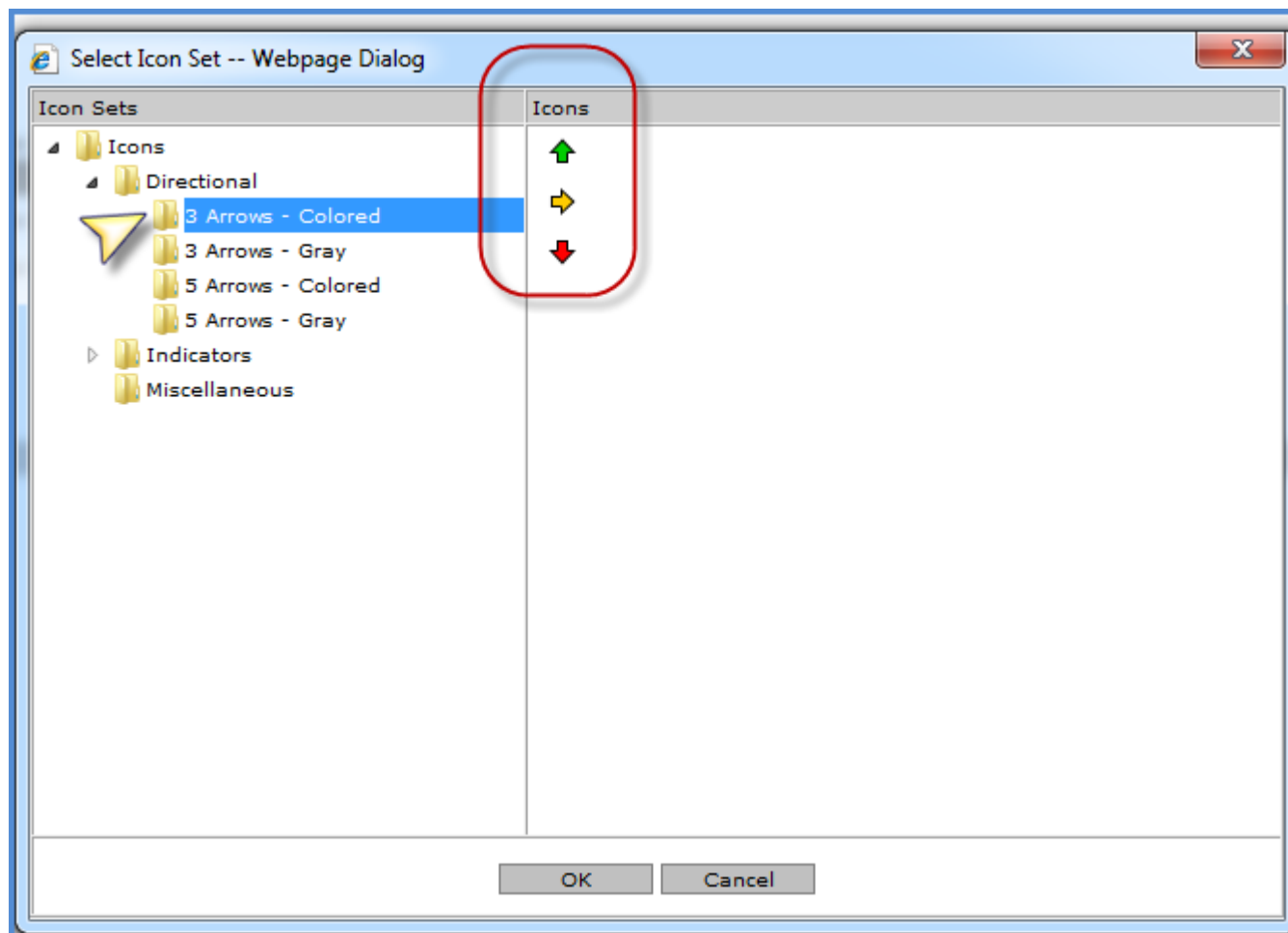
3. Click OK and the Conditional Format Maintenance window will redisplay with blank rules for each icon included in the selected set. Then you can complete the rules for the conditional format.

Save a Custom Conditional Format

Custom conditional formats can be created on-the-fly, and they are not available for use in other views or by other users unless they are saved as a conditional format. However, you can perform a Save As on a custom conditional format to create a new conditional format that can be used in other views.

Here are the steps for saving a custom conditional format, followed by an example.

1. From the Select Conditional Format window, click the Custom button [Custom] to open the Custom Conditional Format window.

2. Define all the rules to be applied to the measure item.

3. Click the Save As button [Save As] to open the Save Custom Conditional Format As window.

4. If a name and / or description were entered on the Custom Conditional Format window, they default on the Save Custom Conditional Format As window. After specifying a name, description, and whether or not the conditional format is global, click the Save button. For advanced users, the Type property defaults to Personal and is disabled.
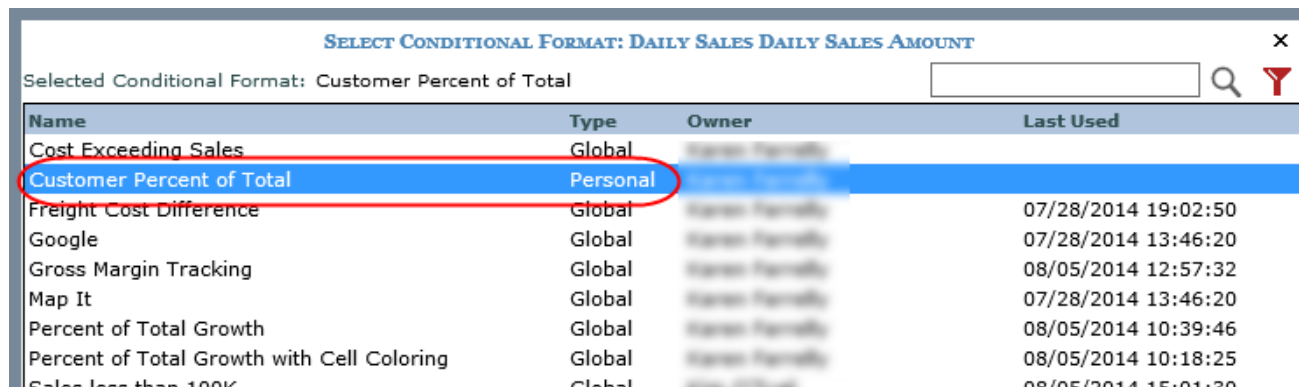
5. The custom conditional format is saved as a conditional format. The Select Conditional Format window is redisplayed with the newly saved conditional format selected (highlighted) in the listing.

Frequently Asked Questions (FAQ's)

Can Global Conditional Formats be Assigned to Any Type of View?

Yes. Global conditional formats may be used with global, personal, or shared views.

Can Personal Conditional Formats be Assigned to Any Type of View?

Yes. Personal conditional formats may be used with global, personal, or shared views.

Why can't I Add a Conditional Format?

You are a casual user. View and security administrators can add, edit, and delete global and personal conditional formats. They can also edit and delete conditional formats owned by other users. Advanced users can add, edit, and delete their own personal conditional formats.

Why do Blank Boxes Show in Views or Conditional Format Windows?

Blank boxes indicate that a file used for a view image or conditional format icon is missing. A file that is deleted, moved, or renamed is considered a missing file. Normally, a red x would display in place of missing files; however, in some cases you may see a blank box instead.

Blank boxes and red x's can be corrected for conditional formats by replacing missing file or updating the conditional format. Blank boxes and red x's can be corrected for images by replacing the missing file or updating the measure item expression.

See also: Why do Red X's Show in Views or Conditional Format Windows?

Example

Here is a view with a conditional format on the last measure item.

Here is a conditional format window showing icons selected for each conditional format rule.

Working with Conditional Formats

The files for the Conditional Format icons were deleted, which results in blank boxes the next time the user runs the view.

View Name: Product Sales, Returns, Margins
View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	☐
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	☐
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	☐
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	☐
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	☐
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	☐
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	☐
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	☐

The blank boxes also show in conditional format windows, such as the Conditional Format Maintenance window.

Conditional Format Maintenance

General

Name: Gross Margin Tracking for Product

Description: Indicators of various margins achieved

Type: Global ▾   [Pre-fill Icons]

Display the following icons and formats according to these rules:

↕	Icon	Format			Operator			Value		Options	
	☐	1234.10	Icon	Format	when value is	> ▾		10000		Add	Remove
	☐	1234.10	Icon	Format	when value is	> ▾		5000		Add	Remove
	☐	1234.10	Icon	Format	for all other values						

The user can select new icons for each rule. Here are the new selections for the rules followed by the updated view reflecting the changes.

Conditional Format Maintenance

General

Name: Gross Margin Tracking for Product

Description: Indicators of various margins achieved

Type: Global ⌄ [Pre-fill Icons]

Display the following icons and formats according to these rules:

⬍ Icon	Format			Operator		Value	Options	
🟢	1234.10	Icon	Format	when value is	> ⌄	10000	Add	Remove
🟡	1234.10	Icon	Format	when value is	> ⌄	5000	Add	Remove
🔴	1234.10	Icon	Format	for all other values				

View Name: _Product Sales, Returns, Margins_

View Filter

Product	Actual Sales Amount Jan 2014 to Sep 2014	Returns Amount Jan 2014 to Sep 2014	Ext Actual Cost Jan 2014 to Sep 2014	Gross Margin Amount Jan 2014 to Sep 2014
Pear Hlvs LS 12 oz BR* 0A	$9,513	($965)	$6,725	🔴
Peach Hlvs HS 12 oz BR* 0A	$6,243	($570)	$4,663	🔴
Applesauce 12oz BR* 0A	$34,138	($3,717)	$26,406	🟡
FrtCktail HS 12 oz BR* 0A	$20,521	($1,788)	$15,423	🟡
Pear Slcs LS 12 oz BR* 0A	$25,353	($5,206)	$21,443	🔴
Peach Hlvs LS 12 oz BR* 0A	$12,838	($1,256)	$9,053	🔴
Peach Slcs LS 16 oz BR* 0A	$19,834	($1,424)	$14,530	🟡
Pear 6oz LnchPk LS 0A	$19,189	($2,301)	$14,551	🔴
Mand Org Pcs 12oz BR* 0A	$18,021	($2,537)	$13,161	🔴
Escalloped Apples 12 oz BR* 0A	$19,896	($1,422)	$14,362	🟡
Peach Slcs HS 12 oz BR* 0A	$27,096	($2,678)	$20,638	🟡
Sw Cherries Pittd 12oz BR* 0A	$39,388	($3,823)	$31,181	🟡
Peach Slcs LS 12oz BR* 0A	$58,094	($9,114)	$41,445	🟢
Tropical Mix LS 12oz BR* 0A	$13,052	($833)	$10,608	🔴
Peach 6oz LnchPk BR* 0A	$32,883	($2,805)	$25,054	🟡
Pnappl Slcs 12 oz BR* 0A	$127,980	($13,615)	$95,597	🟢
Prunes Pitted 12 oz BR* 0A	$4,424	($1,053)	$3,135	🔴
Pnappl Bites 12oz BR* 0A	$7,296	($1,170)	$5,419	🔴

Why do Red X's Show in Views or Conditional Format Windows?

Red x's indicate that a file used for a view image or conditional format icon is missing. A file that is removed, moved, or renamed is considered a missing file. Normally, a red x would display in place of missing files; however, in some cases you may see a blank box instead.

Blank boxes and red x's can be corrected for conditional formats by replacing missing file or updating the conditional format. Blank boxes and red x's can be corrected for images by replacing the missing file or updating the measure item expression.

See also: Why do Blank Boxes Show in Views or Conditional Format Windows?

Example

Here is a view with a calculated measure item that displays product images.

	Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	▼ Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Jan 20
	620A954020	Navel Oranges 0A	D		19.462	
	620B954000	Red Ripe Tomatoes 0B	B		15.195	
	620A954017	Cherries, Bing 0A	D		13.674	
	620A954014	Asparagus 0A	B		13.091	
	620A954011	Baby Carrots 0A	A		12.692	
	620A954016	Strawberries 0A	C		12.320	
	620A954008	Bananas 0A	A		4.588	

The files for the product images are moved, resulting in red x's the next time the user runs the view.

▼ Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	▼ Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Jan 20
620A954020	Navel Oranges 0A	D	☒	19.462	
620B954000	Red Ripe Tomatoes 0B	B	☒	15.195	
620A954017	Cherries, Bing 0A	D	☒	13.674	
620A954014	Asparagus 0A	B	☒	13.091	
620A954011	Baby Carrots 0A	A	☒	12.692	
620A954016	Strawberries 0A	C	☒	12.320	

The user updates the calculated measure item expression to reflect the new location for the image files. The refreshed view displays the desired product images once again.

▼ Product	Prod Long Description	Prod ABC Classification	Product Image From the Images Directory	▼ Actual Sales Sales Units Jan 2014 to Sep 2014	Actual Jan 20
620A954020	Navel Oranges 0A	D		19.462	
620B954000	Red Ripe Tomatoes 0B	B		15.195	
620A954017	Cherries, Bing 0A	D		13.674	
620A954014	Asparagus 0A	B		13.091	
620A954011	Baby Carrots 0A	A		12.692	
620A954016	Strawberries 0A	C		12.320	
620A954008	Bananas 0A	A		4.588	

Global, Personal, and Shared Objects

Several types of objects in this application can be set up with either global, personal, or shared designations. Views fall into that category. Also, user lists, user links, actions, and conditional formats can be either global or personal but not shared. Broadcast schedules and broadcast groups always have a global designation. Data copies, data imports, and master data imports always have a personal designation. User Controlled Attributes don't have any type of object designation associated with them. Their definitions in Stratum.Viewer are independent of who originally created them.

The global, personal, or shared designation is a means of controlling which users can use the objects and save edits to the objects.

- **Global Objects** – global views, user lists, user links, actions, and conditional formats can be used by all users but only created by administrators. For example, an administrator creates a global view and enables it for the view groups of other users. Those users will be able to see the global view in the All tab of their Stratum View Pane and run the view. They cannot change the global view definition. If they make edits to the global view and want to save them, they can perform a Save As to create a shared or personal copy of the view.
- **Personal Objects** – can be used by all users but only edited by object owners and administrators. For example, a user with an advanced level of access in the application can filter a view using another user's personal user list but cannot maintain that user list.
- **Shared Views** – can be created or used by any type of user. Anyone with access to the view group to which the view belongs will see the shared view in the All tab of their Stratum View Pane. A shared view is a collaborative view for use within a group or department, but does not need to be managed by a Viewer administrator.

Custom Conditional Format vs. Conditional Format

Conditional formats are pre-defined by administrators and advanced users and can be associated with measure items to visually represent and highlight data in the Viewer grid. Custom conditional formats can be created on-the-fly, are intended to be used only one time, and are only associated with a single measure item. They are not available for use in other views or by other users.