

Strategy Macros



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Chapter

1

Overview

Topics:

- Overview of Strategy Macros
- Access Strategy Macros
- Create a Strategy Macro
- Schedule a Strategy Macro Run

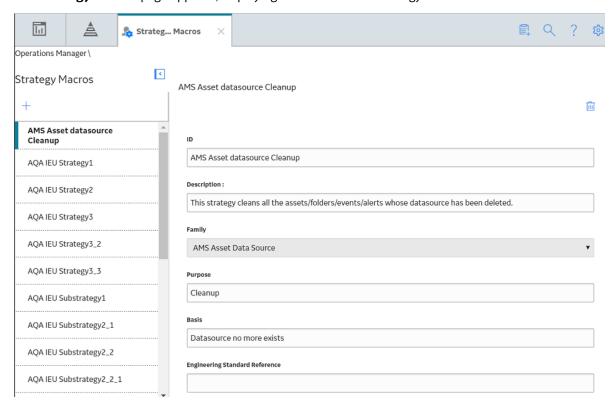
Overview of Strategy Macros

Strategy Macros allows you to schedule one or more executions of the family-level rules associated with particular families.

Access Strategy Macros

Procedure

In the module navigation menu, select **Admin > Operations Manager > Strategy Macros**. The **Strategy Macros** page appears, displaying a list of available strategy macros.



Note:

- If you want to modify a strategy macro, select the strategy macro, modify the values as needed, and then select .
- If you want to delete a strategy macro, select the strategy macro, and then select in the <Strategy Macro Name > workspace.

Create a Strategy Macro

Before You Begin

You must have completed the Rules workflow, creating or modifying the family-level rules associated with the family whose rules will be run by the strategy macro that you are creating.

Procedure

- 1. Access Strategy Macros.
- 2. In the upper-left corner of the left pane, select +. The workspace for a new strategy macro appears.
- 3. In the Family box, select the family whose rules will be run by the strategy macro.

Note: When the strategy macro is run, all family-level rules associated with the selected family will be executed.

- 4. As needed, enter values in the ID, Description, Purpose, Basis, and Engineering Standard Reference boxes.
- 5. If this is a sub-strategy, select the **Sub-strategy** check box.
- 6. If you want the strategy macro to be run for each family that is a subfamily of the family selected in the **Family** box, select the **Spread** check box.
- 7. In the upper-right corner of the workspace, select .
 The strategy macro is created.

Next Steps

· Schedule a strategy macro.

Schedule a Strategy Macro Run

Before You Begin

· Create a strategy macro.

Procedure

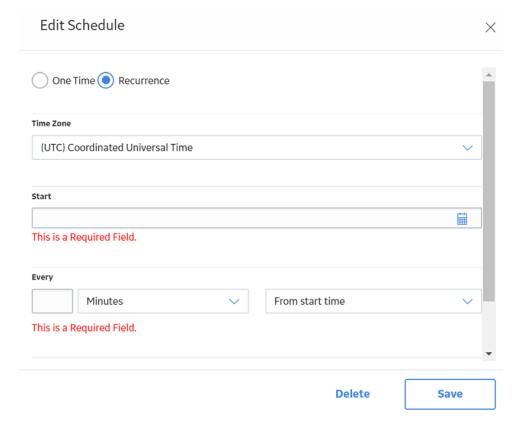
- 1. Access Strategy Macros.
- In the left pane, select the tab for the strategy macro whose run you want to schedule.
 The workspace for the selected strategy macro appears. The **Schedule** section contains several rows, each with a button and a **Run As** box.

Tip: Using the rows in the **Schedule** section, you can create multiple scheduled runs for a single strategy macro. In each **Run As** box, you can select the Security User whose account will be used to execute the associated scheduled run. This allows you to apply the site filtering associated with a particular Security User to a scheduled strategy macro run.

Tip: For more information, refer to the Site Filtering section of the documentation.

- 3. In the **Schedule** section, in the row for the scheduled run that you want to create or modify, in the **Run As** box, select the Security User whose account will be used to execute the scheduled run.
- 4. In the same row, select .

The **Edit Schedule** window appears.



- 5. Select either the **One Time** or **Recurrence** check box.
- 6. In the **Time Zone** box, select the time zone in which you want the first scheduled execution to occur.
- 7. In the **Start** box, specify the date and time at which you want the first scheduled execution to occur.
- 8. If you selected the **Recurrence** check box, in the **Every** section, specify the frequency at which you want the execution to occur.
- 9. If you selected the **Recurrence** check box, in the **End** section, specify when the recurring execution should end.
- 10. Select Save.

The **Edit Schedule** window closes, and a description of the scheduled strategy macro run appears in the row.

11. In the same row, select .

The strategy macro run is scheduled.