



# Strategy Macros



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# Chapter 1

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## 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.

The screenshot shows the 'Strategy Macros' configuration page. On the left, a list of macros is displayed, with 'AMS Asset datasource Cleanup' selected. The main area shows the configuration details for this macro:

- ID:** AMS Asset datasource Cleanup
- Description:** This strategy cleans all the assets/folders/events/alerts whose datasource has been deleted.
- Family:** AMS Asset Data Source
- Purpose:** Cleanup
- Basis:** Datasource no more exists
- Engineering Standard Reference:** (empty field)

### 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](#).
2. 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.

Edit Schedule

One Time  Recurrence

Time Zone

(UTC) Coordinated Universal Time

Start

This is a Required Field.

Every

Minutes From start time

This is a Required Field.

Delete Save

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.