Implementation Steps
Master Data Import Functionality

Overview

This document describes what is required to enable and implement Master Data Import.

- [One Time Setup](#)
- [Defining User Controlled Attributes & Doing Imports](#)

After to-do's have been completed, Stratum.Viewer users can import user controlled data* by clicking Master Data Import in the Analyst Tools group from the main menu in the top panel of Stratum, then selecting an import file and using the provided mapping window to select the target for the imported data. Complete information about import file setup, mapping, and so on are in the Master Data Import section of Viewer online help.

*Note: User Controlled Attributes are the type that can have their values updated by Master Data Import functionality, and they are added using Viewer's User Controlled Attribute Maintenance functionality. That functionality is only available for implementations running Stratum.Server on a Windows SQL server. It is not available for implementations running Stratum.Server on an IBM i Server. See the last section of this document and the User Controlled Attributes section of Viewer online help for more details.

Important – Read First

General Verifications To Complete

Verify your Stratum implementation meets the following server, software, and Viewer Impersonation Account requirements.

1. The Stratum.Server application for the implementation must be on a Windows SQL server. Master Data Import is not available for implementations running Stratum.Server on an IBM i Server.
2. Stratum.Connector and Stratum.Viewer must be at version 7.2 or greater. If they are not, obtain the necessary software and upgrade as you have in the past using the separate Viewer / Connector install/upgrade guides.
3. The Stratum.Viewer implementation must have a valid license for the Stratum Analyst Hub. If you don't have the application, contact your Silvon Sales Representative at (800) 874-5866 or email us at info@silvon.com.
4. Verify that you have proper authority defined for the Viewer Impersonation Account. Details about the required authority are in the "Installation Requirements" document.

One -Time Setup

1. In Viewer, enter the registration key for the Stratum Analyst Hub. Use the provided field of the Stratum Analyst Hub section of the Application window. If a key was specified there in the past, skip to the next setup step.

2. In Viewer, specify the Master Data Import upload file location using the Stratum Analyst Hub section of the Application window. Copies of import data files are uploaded to this location.

a. When specifying the location, use the full UNC path format \\host-name\share-name\file_path\ and include a backslash mark \ as the final character. For example: \\serverabc\D$\User Controlled Data\Uploaded Import Files\
b. The location must be one that exists already and one to which your implementation's Viewer Impersonation account has access rights.

3. In the General tab of Connector's Parameter Settings window, use the Process Pending parameters to determine how Connector will handle pending User Controlled Attributes for certain types of processes.

Process Pending User Controlled Attribute Update – Properties in this section determine how pending changes for attributes added or edited in Stratum.Viewer are treated by Limited and Standard processes. These attributes are known as User Controlled Attributes. Setting a process type to No means it won't process any pending changes. Setting a process type to Yes means the process will check for pending changes and will switch to a Full process if pending changes are found so all changes can be processed.

Note: Only set the properties to Yes in situations where it is okay if the Limited or Standard process is switched to a Full process when pending updates are found (a Full process means users won't be able to access views in Stratum.Viewer until after the process is completed).

4. In the Emails tab of Connector's Parameter Settings window, set up the properties for User Controlled Attribute update emails.

   User Controlled Attribute Update Notification: The email is sent when a Stratum.Viewer user has added, made changes to, or deleted a User Controlled Attribute via that application's User Controlled Attribute Maintenance functionality. The email tells the recipient that a Full process may be required in Connector to process the changes.

5. Familiarize yourself with the new Batch Command parameters for Master Data Import. These pertain to Limited and Standard Connector processes initiated via a batch command.

Master Data Import Parameters	Purpose	Required?
/LimitedProcessPendingUpdates:*Limited ProcessUCAUpdatesEnum*	*This parameter only pertains to a process type 4 – Limited. Use it to direct a Limited process to check for then process any pending changes related to User Controlled Attributes such as new or edited User Controlled Attributes.* *Valid values for LimitedProcessUCAUpdatesEnum are:* 0 – No, do not process pending changes for User Controlled Attributes. 1 – Yes, process pending changes for User Controlled Attributes.	No - By default, it is controlled from the General tab of the Parameter Settings window. Only use this parameter if you want to override the setting in that window. Only set this to Yes in situations where it is okay if the Limited process is switched to Full process (a Full process means users won't be able to access views in Stratum.Viewer until after the process is completed).
/StandardProcessPendingUpdates:*Stand ardProcessUCAUpdatesEnum*	*This parameter only pertains to a process type 1 – Standard. Use it to direct a Standard process to check for then process any pending changes related to User Controlled Attributes such as new or edited User Controlled Attributes.* *Valid values for StandardProcessUCAUpdatesEnum are:* 0 – No, do not process pending changes for User Controlled Attributes. 1 – Yes, process pending changes for User Controlled Attributes.	No - By default, it is controlled from the General tab of the Parameter Settings window. Only use this parameter if you want to override the setting in that window. Only set this to Yes in situations where it is okay if the Standard process is switched to Full process (a Full process means users won't be able to access views in Stratum.Viewer until after the process is completed).

6. If you are using Master Data Import and the Planning application to update the Stratum warehouse, make sure that your custom Consolidation Writeback process for Connector runs the LOADOLAP and CRTOMAST commands.
    a. Master Data Import allows users to import data for dimension key values that don't exist in a Mast table. When a key value does not exist, then a key value will be added to the UCA Master and MembersN tables.

Note: The dimension key value is NOT added to the MASTER and MAST tables.

    b. Once the dimension key value is added using Master Data Import, users can add planning data for that key value. This means that there will be transactions in the Planning Writeback tables for key values that don't exist in the Mast table.
    c. The custom Consolidation Writeback process for Connector needs to run the LOADOLAP and CRTOMAST commands so that any new dimension key values will be properly added to the Mast table.

Helpful Definitions To Know

Attribute values are controlled either on the Corporate side of things in Stratum.Server **or** with Stratum.Viewer's Master Data Import functionality. The type controlled by Master Data Imports are known as User Controlled Attributes. Both types defined below can be used in the same way in Viewer.

- **Corporate Controlled Attribute** – Their values originate from your Corporate business systems and are stored in your Stratum.Server database. They can be selected for use and maintained in Stratum.Connector.
- **User Controlled Attribute** – Their values originate from an Excel spreadsheet and become part of Stratum using Stratum.Viewer's Master Data Import functionality. They can be added and maintained in Viewer.

Setting Up User Controlled Attributes

You need to set up User Controlled Attributes in Viewer before you can upload data to them via Master Data Imports. See the User Controlled Attributes section of Viewer online help to learn how to set up User Controlled Attributes. A User Controlled Attribute option for administrators is in the Manage Things group from the main menu in the top panel of Stratum. That is used to add those attributes, edit them, and access their processing details.

Note: A Full process must be run in Connector in order for a newly added or edited User Controlled Attribute to be available in the Stratum cube and in Viewer.

User Controlled Attribute Maintenance

General

Dimension:	Product Group
Attribute:	User Controlled Marketing Code
Default Value:	?
Create Hierarchy:	Yes
Hierarchy Name:	Product Group User Controlled Marketing Code
Level Name:	Product Group User Controlled Marketing Code

Details

Last Updated Date:	9/18/2020 12:31:56 PM
Last Updated By:	Karen Shype
Pending Updates:	No
Last Master Data Import Date:	9/18/2020 2:07:03 PM
Last Master Data Import By:	Karen Shype

Using Master Data Import

You are now ready to import data into User Controlled Attributes using Master Data Import.

1. Master Data Import is only available to Viewer's View and Security Administrators. If you wish to provide this functionality to a Casual or Advanced user, you need to set up a User Link for them. The URL for the User Link is comprised of your Viewer implementation's URL, then a forward slash, and then the text DataImportListWindow.aspx. Here's an example URL: http://server-xyz:55001/MasterDataImportListWindow.aspx .

2. During an import, the impacted dimension will be "processed" to make new master data available to Viewer users. The Stratum cube and Viewer will be available while the dimension is processing.

Data Mapping - Master Data Import

Use this preview of your import file to tell us how to treat data during the import. Click the Configuration button if the preview layout doesn't match the import file layout or you want to map to different data than what's provided in the preview lists.

Import Option: Update ▽   Validate   Configuration   Preview of rows 1 - 100

Dimension ▼	Ignore ▼	Attribute ▼	Attribute ▼
Product Group ▼	▼	User Controlled PGrp Marketing Code ▼	User Controlled PGrp Sales Division ▼
Product Group	**PGrp Long Description**	**User Controlled PGrp Marketing Code**	**User Controlled PGrp Sales Division**
10	Fresh Produce	9745	Grocery Chains
11	Canned Goods	9850	Food Services Industry
12	Fresh Meats	9746	Grocery Chains
13	Frozen Foods	9950	Food Services Industry