

# Stratum Year End Maintenance Guide



This document describes yearly maintenance steps to carry out in Stratum.Planner for your Stratum environment. Before the end of each year, you need to define a New Year for your Stratum database's Import calendar. That needs to be done so data from the upcoming year has a place to be stored in the future as data from the new year is generated and loaded into the database.

For assistance with these steps, contact Silvon customer support at [CustomerSupport@silvon.com](mailto:CustomerSupport@silvon.com).

## Important Notes – Read First

Before completing the steps in this document, make sure to have a backup of the following calendar tables:

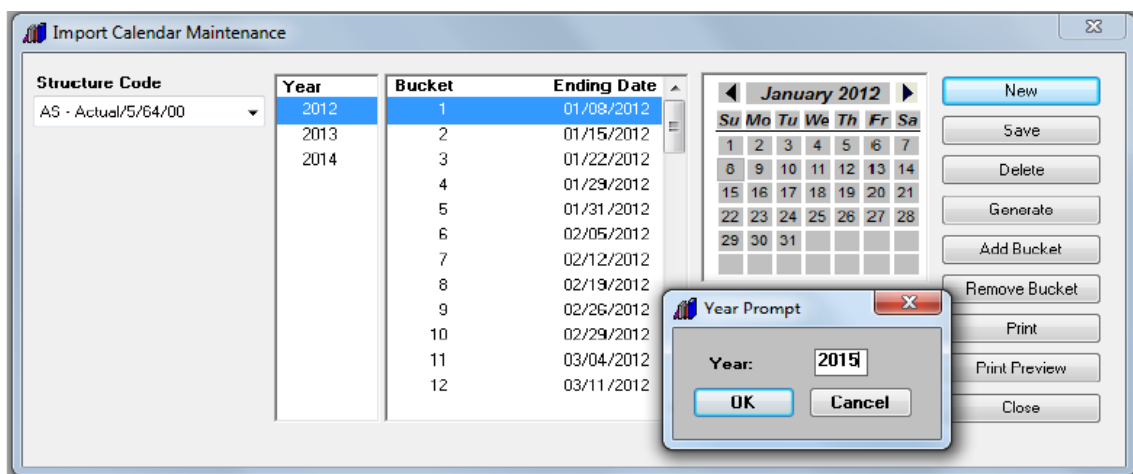
- DTVBX
- DTVG
- DTVS
- DTVSCUR
- DTVSI

Also, if you use Stratum.Viewer with your Stratum implementation, you must also set up new year maintenance for Stratum.Viewer. Do that after finishing the steps in this document. Here's a link about Stratum.Viewer New Year maintenance: [Stratum.Viewer Year End Maintenance Guide](#).

## Define The New Year In The Import Calendar

To define a New Year, follow these steps:

1. In the Stratum.Planner Administration Component, select Utilities and Import Calendar.
2. In Import Calendar Maintenance:
  - a. Highlight the specific Structure Code, select New, enter the New Year and click OK.



- b. Enter the Start date for the New Year in Starting Date, and then click the Generate button.

**Import Calendar Maintenance**

Structure Code: AS - Actual/5/64/00

Year: 2012, 2013, 2014, 2015

Bucket:

Ending Date:

Starting Date: 01/01/2015

Buttons: New, Save, Delete, Generate, Add Bucket, Remove Bucket, Print, Print Preview, Close

- c. Verify the ending date from each bucket is correct, click Save, and then click Close.

**Import Calendar Maintenance**

Structure Code: AS - Actual/5/64/00

Year: 2012, 2013, 2014, 2015

Bucket	Ending Date
1	01/08/2015
2	01/15/2015
3	01/22/2015
4	01/29/2015
5	01/31/2015
6	02/05/2015
7	02/12/2015
8	02/19/2015
9	02/26/2015
10	02/28/2015
11	03/05/2015
12	03/12/2015

Starting Date: 01/01/2015

Calendar: January 2015

Buttons: New, Save, Delete, Generate, Add Bucket, Remove Bucket, Print, Print Preview, Close

## Verify The New Year Is Defined/Created For Tables In Structure Code

Next, define the related tables and Structure Codes.

1. In the Stratum.Planner Database Install component, select Installation and Define Tables.
2. In Define Tables:
  - a. Highlight the specific Structure Code.
  - b. Verify/Enter the New Year in the Year field.
  - c. Highlight the DSLs.
  - d. Click the Perform button. Then click Close.

Structures			
Code	Description	Buckets	Type
AB	ABC	64	Periodic
AR	Support Annuals	64	Weekly-SparsePeriodic
AS	Actual	64	Weekly-SparsePeriodic

Year: 2015

DSL's

Dimension	Values
AS999131	AS999132
AS999141	AS999142
AS999151	AS999152

3. In the Stratum.Planner Database Install component, select Installation and Create Tables.

4. In Create Tables:
  - a. Highlight the specific Structure Code.
  - b. Click the Create Tables button.

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**\*Important Note:** Only tables in black will get created or recreated. All tables in red will remain as is.

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**Structures**

Code	Description	Buckets	Type
AB	ABC	64	Periodic
AR	Support Accruals	64	Weekly-SparsePeriodic
AS	Actual	64	Weekly-SparsePeriodic

**Selected Dimensions**

Code	Description	Buckets
38	Facility	5
39	Plant	10
40	Location	5
41	Department	10
42	Work Center / Cell	10
43	Machine	10

**Tables To Create**

Table	Description
AS999131	Dimension Table
AS999132	Values Table
AS999141	Dimension Table
AS999142	Values Table
AS999151	Dimension Table
AS999152	Values Table
EPERRORAS	Extract Pending Error- 1 Period
EXTCHGAS	Change Set Pending - 1 Period
EXTIPRAS	iPlanner Extract Pending - 1 Period
EXTPLNAS	Planning Extract Pending - 1 Period
EXTPNAS	Extract Pending - 1 Period
FPERRORAS	Extract Pending Error - All Periods
FULCHGAS	Change Set Pending - All Periods

\* One or more tables contain data

Close Create Tables Show Log

## Verify The New Year Is Defined For ViewSet

Next, define details for the New Year related to Stratum ViewSets.

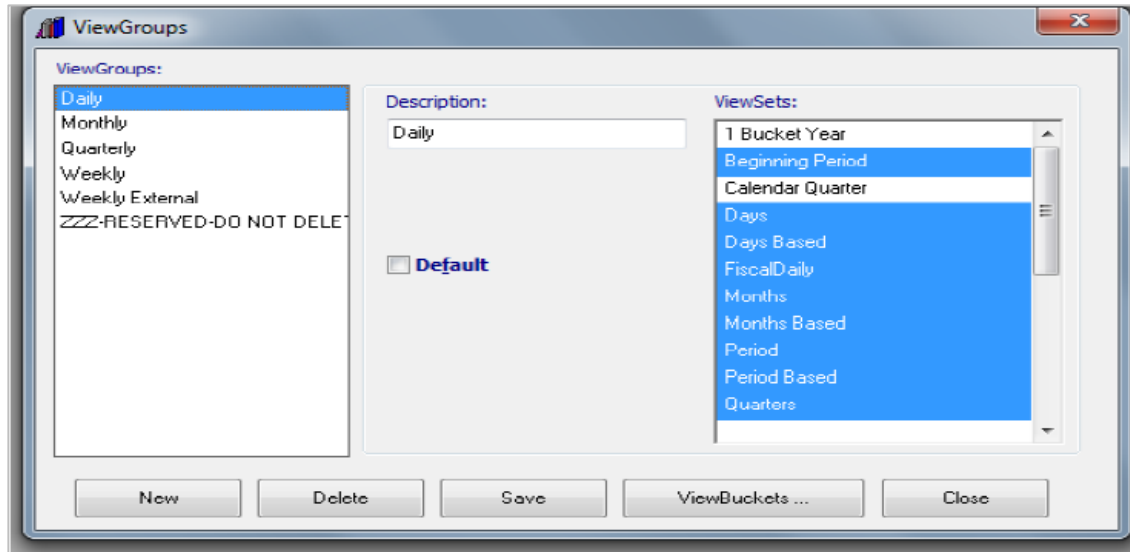
1. In the Stratum.Planner Administration Component, select DataViews and select ViewSets.
2. In ViewSets:
  - a. Highlight the Year ViewSet and select View Items.
  - b. In ViewSetItems, scroll to the last year and click the Add button.
  - c. Enter the year in the Short and Long Description fields.
  - d. Click the Close button and then the Save button.

The screenshot shows a software interface window titled "ViewSetItems For 'Year'". Inside the window, on the left, is a list box containing the years "2013" and "2014", with "2014" highlighted in blue. Above this list is a dropdown menu showing "Single Clone" and a "Perform" button. To the right of the list is a form with three input fields: "Short Description:" containing "2015", "Long Description:" containing "2015", and "Year:" containing "2015". At the bottom of the window are five buttons: "Add", "Insert", "Remove", "Clear All", and "Close".

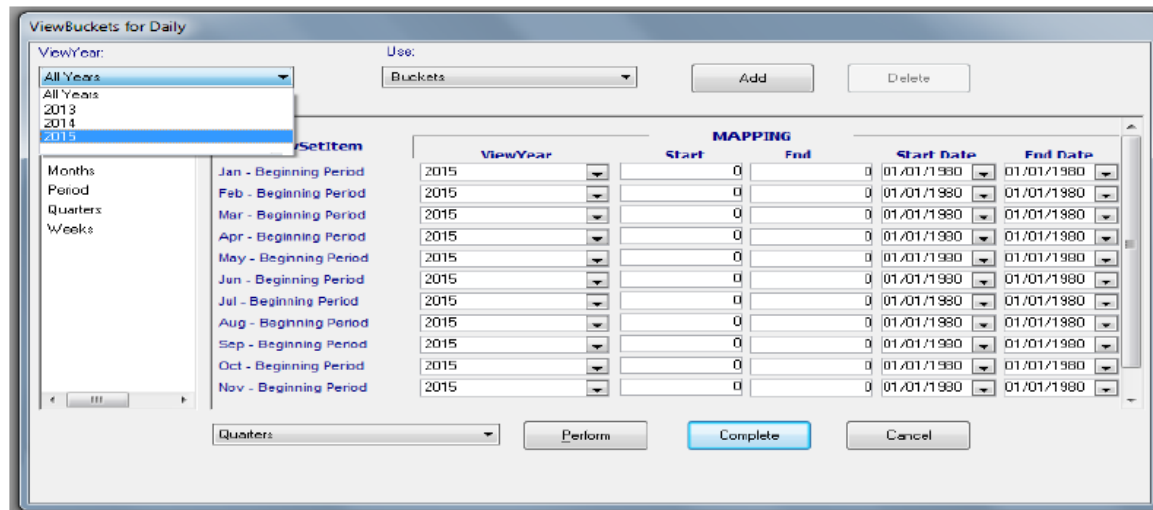
## Verify The New Year Is Defined For ViewGroup/ViewBuckets

Next, define details for the New Year related to Stratum ViewGroup and ViewBuckets.

1. In the Stratum.Planner Administration Component, select DataViews and select ViewGroups.
2. In ViewGroups, highlight the specific ViewGroup and click the ViewBuckets button.



3. In ViewBuckets, select the New Year from View Year in the dropdown list that's in the upper left corner of the window.



4. Map each ViewSet's individual ViewSet Items with the correct start/end bucket and start/end dates.
5. Click the Complete button and then the Save button.

**ViewBuckets for Daily**

ViewYear:  Use:

ViewSets:

- Beginning Period
- Days**
- FiscalDaily
- Months
- Period
- Quarters
- Weeks

ViewSetItem	ViewYear	MAPPING		Start Date	End Date
		Start	End		
January 1	2015	1	1	01/01/2015	01/01/2015
January 2	2015	0	0	01/01/1980	01/01/1980
January 3	2015	0	0	01/01/1980	01/01/1980
January 4	2015	0	0	01/01/1980	01/01/1980
January 5	2015	0	0	01/01/1980	01/01/1980
January 6	2015	0	0	01/01/1980	01/01/1980
January 7	2015	0	0	01/01/1980	01/01/1980
January 8	2015	0	0	01/01/1980	01/01/1980
January 9	2015	0	0	01/01/1980	01/01/1980
January 10	2015	0	0	01/01/1980	01/01/1980
January 11	2015	0	0	01/01/1980	01/01/1980

Quarters

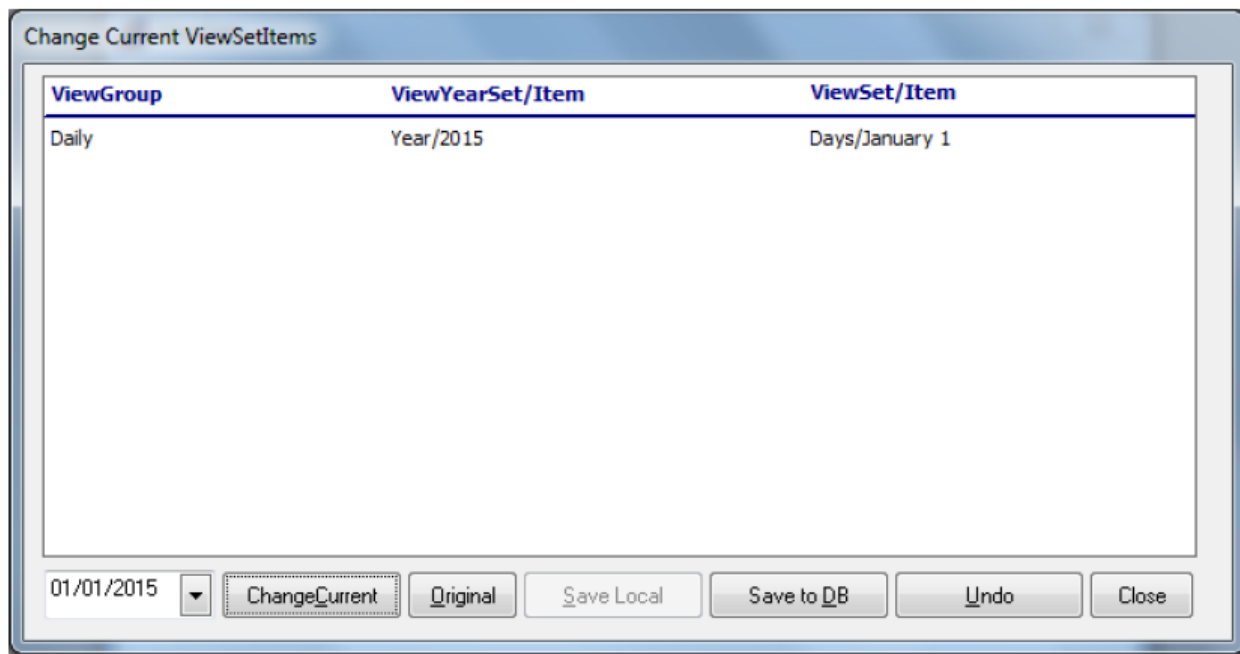
## Verify The New Year Is Defined As The Current Year For All ViewSets

A final set of tasks is to make sure the New Year is defined as the current year for all ViewSets.

1. You can set current date with the nightly automation process that runs Set current commands.
  - a. On iSeries server, the command is UPDCURPER.
  - b. On Windows server, the command is GIUPDPER.

### OR

1. You can set current date manually.
  - a. In the Stratum.Planner Administration Component, select DataViews and select ViewSets.
  - b. In ViewSets, click the Set Current button.
  - c. In Set Current:
    - Click the ChangeCurrent button.
    - Verify/enter current date for New Year.
    - Click the Change button.
    - Click the Save to DB button.



### **\*IMPORTANT REMINDER:**

As noted at the beginning of this document, if you use Stratum.Viewer with your Stratum implementation, then you must also set up new year maintenance for Stratum.Viewer. Do that after finishing the steps in this document. Here's a link about Stratum.Viewer New Year maintenance: [Stratum.Viewer Year End Maintenance Guide](#).