# Working with Data Import
Stratum.Viewer 7

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**Definitions**

- Corporate Controlled Category
- Measure
- Regular Measure Item
- Target Category For Data Import
- User Controlled Category

# Getting Started

## Access to Data Import

Security and view administrators have full access to Data Import functionality. Administrators have access to this functionality from a Data Import option in the Analyst Tools menu off of the main menu in Stratum.

Advanced and casual users can access some Data Import features if administrators given them direct access to the Data Import window – and in that case, they can only work with data imports they own. The Data Import option will not display in an Analyst Tools menu for advanced and casual users, but there are two options for giving access to those types of users. Administrators can set up a global user link that points to the Data Import window and add it to the view groups of the applicable advanced or casual users who need access to Data Import. Or, administrators can send those users a direct URL to the Data Import window.

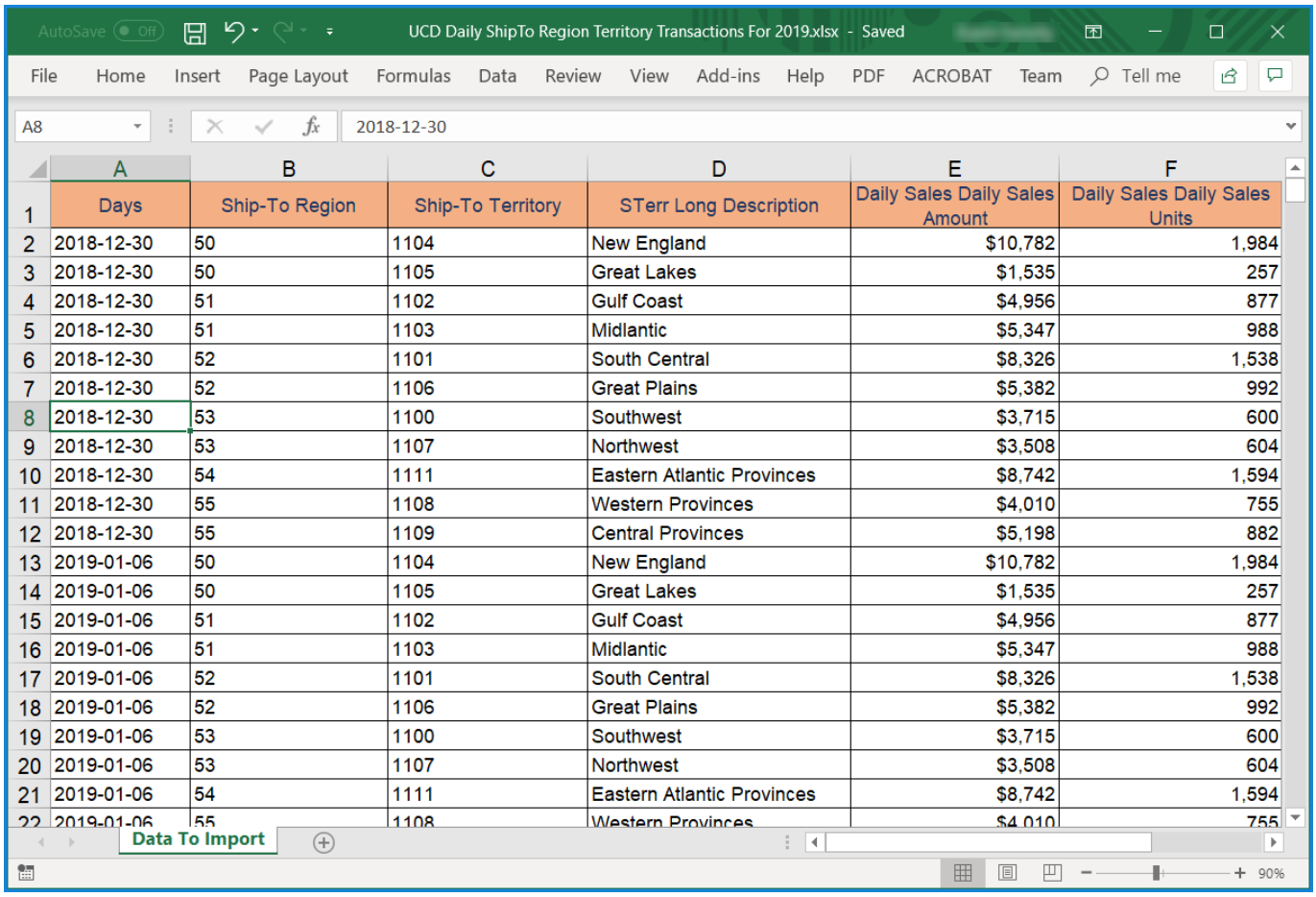
**Note:** Data Import functionality requires a Stratum Analyst Hub license and is available only for Stratum.Viewer implementations where Stratum.Server is running on a Windows server. It is not available for implementations running Stratum.Server on an IBM i Server.

## Introduction to Data Import

User-curated data housed in Excel spreadsheets can be imported directly into the Stratum Data hub via Viewer's Data Import. It's well suited for bringing demographics, budgets and plans, market trends, weather, and other outside data that compliments your core, enterprise data into the hub. Immediately see the imported data in Stratum for centralized analysis with the rest of your business data.

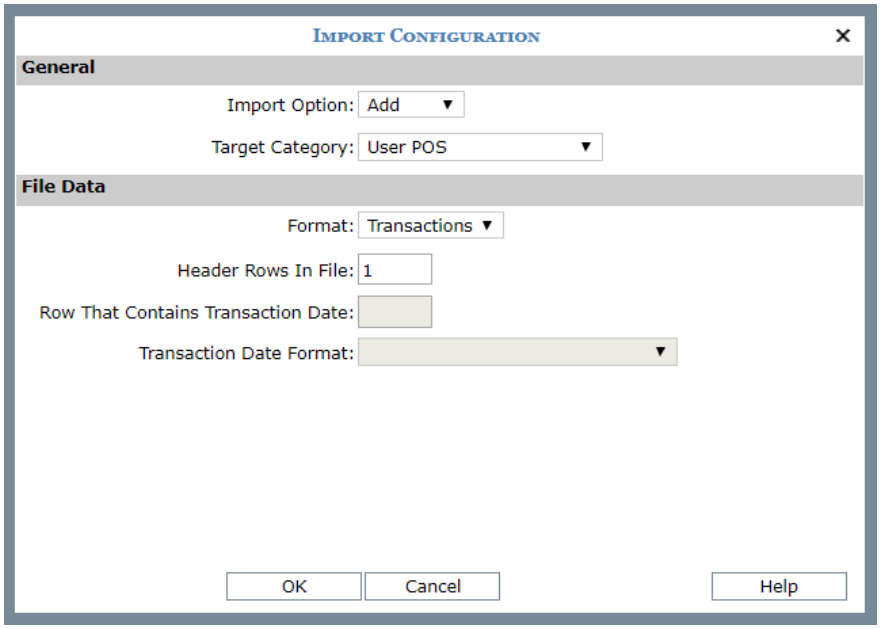
Data Import empowers everyday users – helping them accomplish analyst and citizen data scientist tasks without needing to have IT expertise or deep knowledge of the Stratum database. Data Import is launched from the Analyst Tools menu of Stratum.Viewer. The Data Mapping window guides you through configuring and importing data. The new data is immediately available to use in your views.

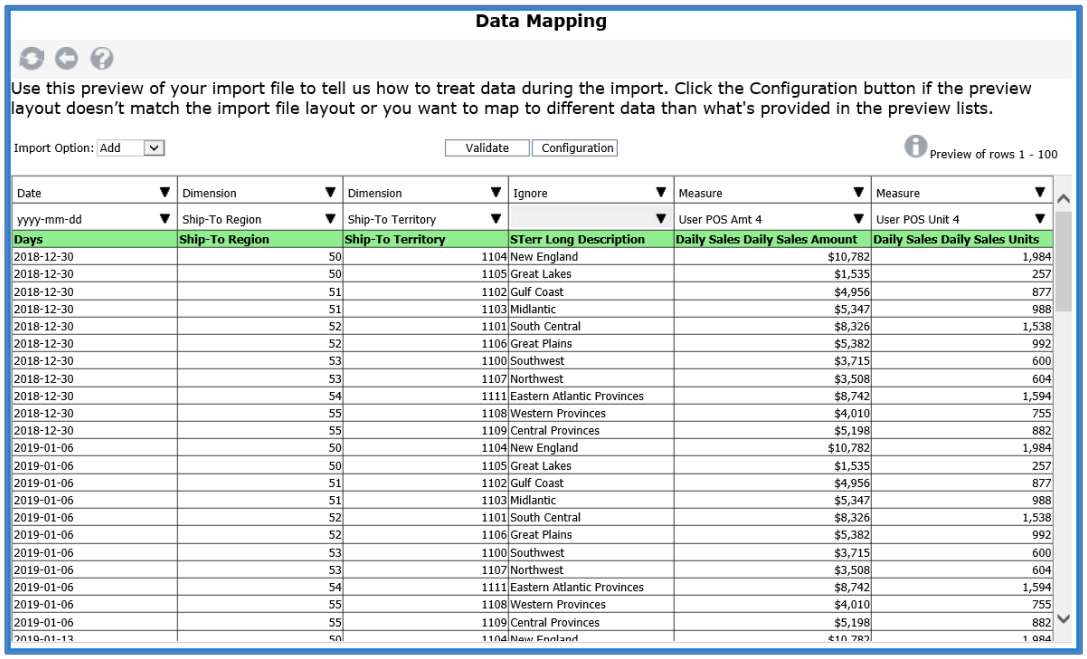
In the following example, data from a Daily Sales category is being used to populate measures in a Point Of Sales (POS) category. The data starts off in an Excel spreadsheet with the date, dimension, and measure data for the import.




| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Days | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales Daily Sales Amount | Daily Sales Daily Sales Units |
| 2 | 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 3 | 2018-12-30 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 4 | 2018-12-30 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 5 | 2018-12-30 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 6 | 2018-12-30 | 52 | 1101 | South Central | $8,326 | 1,538 |
| 7 | 2018-12-30 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | Southwest | $3,715 | 600 |
| 9 | 2018-12-30 | 53 | 1107 | Northwest | $3,508 | 604 |
| 10 | 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 11 | 2018-12-30 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 12 | 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 13 | 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 14 | 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 15 | 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 16 | 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 17 | 2019-01-06 | 52 | 1101 | South Central | $8,326 | 1,538 |
| 18 | 2019-01-06 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 19 | 2019-01-06 | 53 | 1100 | Southwest | $3,715 | 600 |
| 20 | 2019-01-06 | 53 | 1107 | Northwest | $3,508 | 604 |
| 21 | 2019-01-06 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 22 | 2019-01-06 | 55 | 1108 | Western Provinces | $4,010 | 755 |

A configuration and mapping window have properties that tell Viewer what to do with the data.




| Date | Dimension | Dimension | Ignore | Measure | Measure |
|---|---|---|---|---|---|
| yyyy-mm-dd | Ship-To Region | Ship-To Territory | | User POS Amt 4 | User POS Unit 4 |
| **Days** | **Ship-To Region** | **Ship-To Territory** | **STerr Long Description** | **Daily Sales Daily Sales Amount** | **Daily Sales Daily Sales Units** |
| 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 2018-12-30 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 2018-12-30 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 2018-12-30 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 2018-12-30 | 52 | 1101 | South Central | $8,326 | 1,538 |
| 2018-12-30 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 2018-12-30 | 53 | 1100 | Southwest | $3,715 | 600 |
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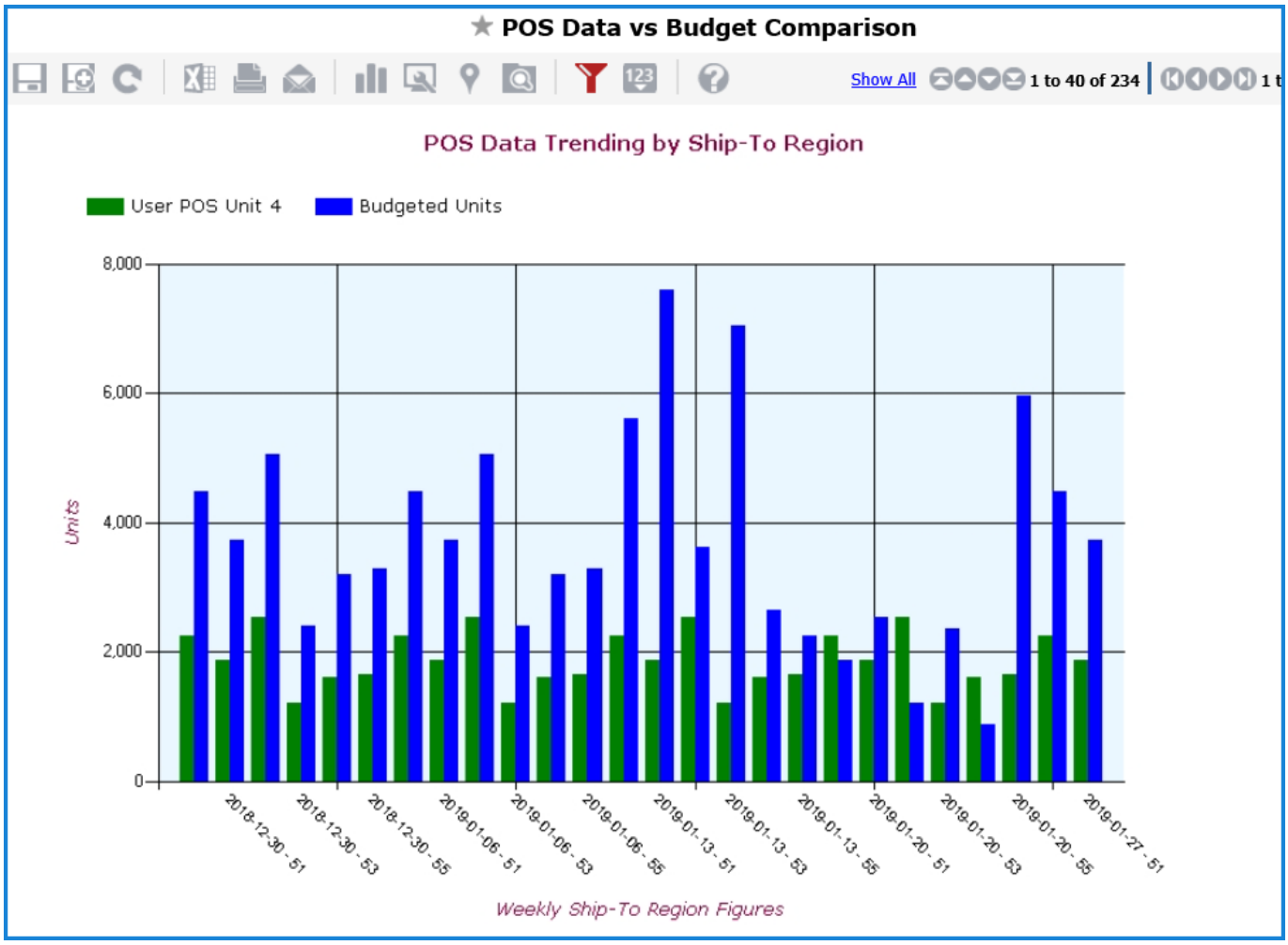
| 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 2019-01-06 | 52 | 1101 | South Central | $8,326 | 1,538 |
| 2019-01-06 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 2019-01-06 | 53 | 1100 | Southwest | $3,715 | 600 |
| 2019-01-06 | 53 | 1107 | Northwest | $3,508 | 604 |
| 2019-01-06 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 2019-01-06 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 2019-01-06 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 2019-01-13 | 50 | 1104 | New England | $10,782 | 1,984 |

The imported data is available immediately in Viewer to build our Stratum views and graphs. Here, some of it's been used to create a chart to analyze POS unit trends in comparison to Budgeted units.



## Import File Types: Transactions Or Time Series

Excel spreadsheets that contain data for imports fall into two different types – either Time Series or Transactions format. The placement of date information in the files is what determines if the file is Time Series or Transactions. Otherwise, both types of import files have many things in common.

First, here's some things that import files have in common. The images that follow are example import files highlighted to show each of the following sections.

- They contain the detailed **measure data** to be imported. This is numeric data such as quantities, monetary amounts, or percentages.
- They contain **dimension and transaction date details** that tell Stratum.Viewer where to place the measure data during the import. Dimension details are the level and member values to which the measure data belongs. Date details include the month, day, and year associated with each piece of measure data in the file.
- They typically contain at least one **header row** which contains descriptive details that help you map the import data to your Stratum levels and measures. Data in the header row isn't imported.

The location of transaction date details in an import file is what distinguishes a Transactions file from a Time Series file. The first example that follows is a Transactions file. The dates appear within a single column in the file. The second example is a Time Series file. The dates appear in a header row across the top of the file. Both of those file layouts are valid. Set up your Excel file in either way depending how the data you have collected is organized and how you plan to later analyze or edit data within Stratum after the import.

### *Transactions File Example*

The following example import file has sales data that's meant to be imported into a POS category. Each row contains a transaction date, dimension and measure data. There is one header row at the top. Transaction dates are in the first column. Distribution Channel, Product Class, and Product Category are the dimensions in the file.

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**Note:** See also Example Import Using A Transactions Import File.

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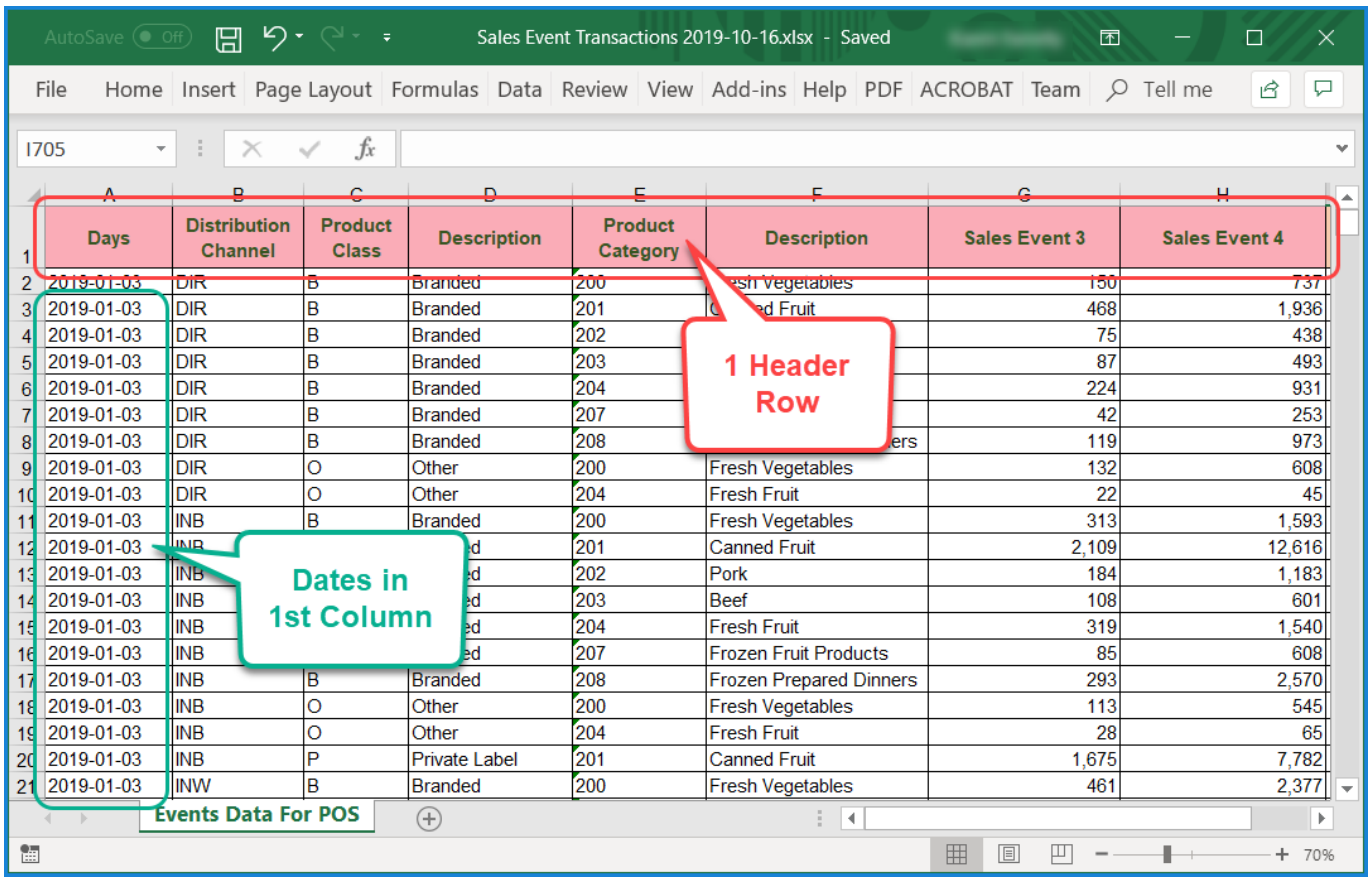
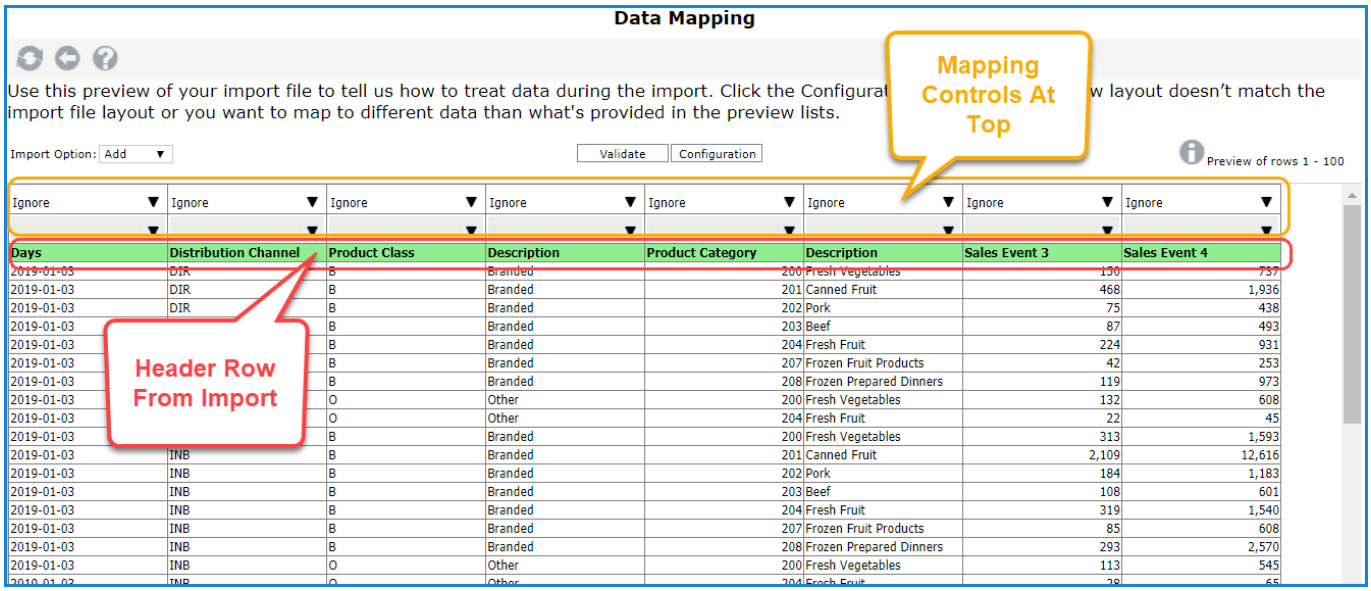
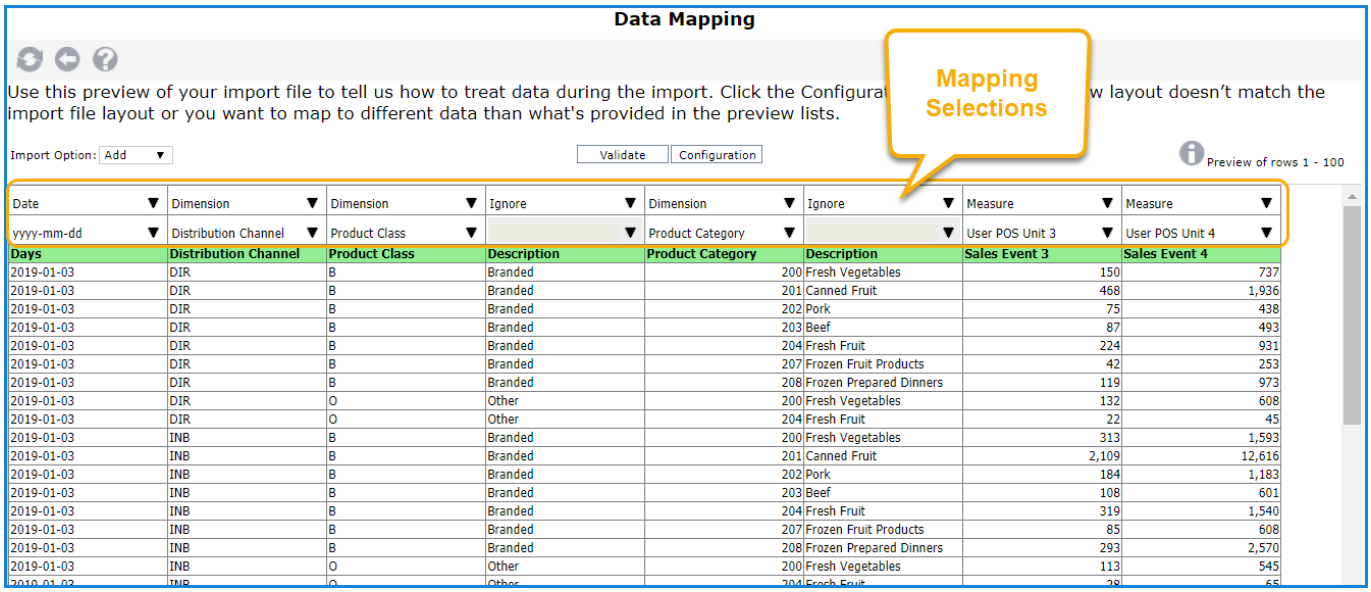



Here's what a preview of the import file data looks like in Viewer's Data Mapping window **before** it's been mapped to any Stratum data. The header row is highlighted in green to distinguish it from the rest of the file and from Data Import properties that get used during mapping.



Here's the preview of the file's data **after** mapping selections were made. Two columns containing descriptive information were left set to "Ignore" because the data they contain are not intended to be imported.

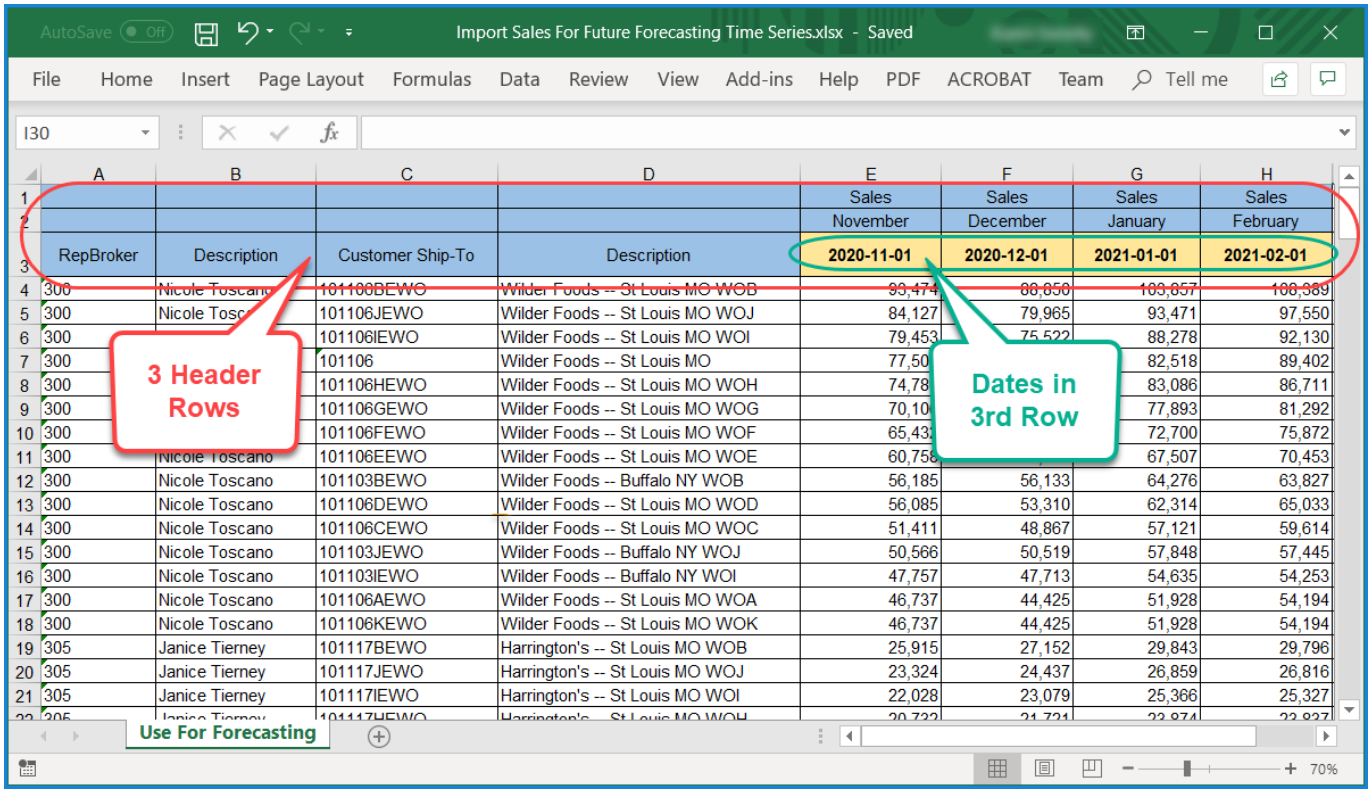



| Date | Dimension | Dimension | Ignore | Dimension | Ignore | Measure | Measure |
|---|---|---|---|---|---|---|---|
| yyyy-mm-dd | Distribution Channel | Product Class | | Product Category | | User POS Unit 3 | User POS Unit 4 |
| **Days** | **Distribution Channel** | **Product Class** | **Description** | **Product Category** | **Description** | **Sales Event 3** | **Sales Event 4** |
| 2019-01-03 | DIR | B | Branded | 200 | Fresh Vegetables | 150 | 737 |
| 2019-01-03 | DIR | B | Branded | 201 | Canned Fruit | 468 | 1,936 |
| 2019-01-03 | DIR | B | Branded | 202 | Pork | 75 | 438 |
| 2019-01-03 | DIR | B | Branded | 203 | Beef | 87 | 493 |
| 2019-01-03 | DIR | B | Branded | 204 | Fresh Fruit | 224 | 931 |
| 2019-01-03 | DIR | B | Branded | 207 | Frozen Fruit Products | 42 | 253 |
| 2019-01-03 | DIR | B | Branded | 208 | Frozen Prepared Dinners | 119 | 973 |
| 2019-01-03 | DIR | O | Other | 200 | Fresh Vegetables | 132 | 608 |
| 2019-01-03 | DIR | O | Other | 204 | Fresh Fruit | 22 | 45 |
| 2019-01-03 | INB | B | Branded | 200 | Fresh Vegetables | 313 | 1,593 |
| 2019-01-03 | INB | B | Branded | 201 | Canned Fruit | 2,109 | 12,616 |
| 2019-01-03 | INB | B | Branded | 202 | Pork | 184 | 1,183 |
| 2019-01-03 | INB | B | Branded | 203 | Beef | 108 | 601 |
| 2019-01-03 | INB | B | Branded | 204 | Fresh Fruit | 319 | 1,540 |
| 2019-01-03 | INB | B | Branded | 207 | Frozen Fruit Products | 85 | 608 |
| 2019-01-03 | INB | B | Branded | 208 | Frozen Prepared Dinners | 293 | 2,570 |
| 2019-01-03 | INB | O | Other | 200 | Fresh Vegetables | 113 | 545 |

## *Time Series File Example*

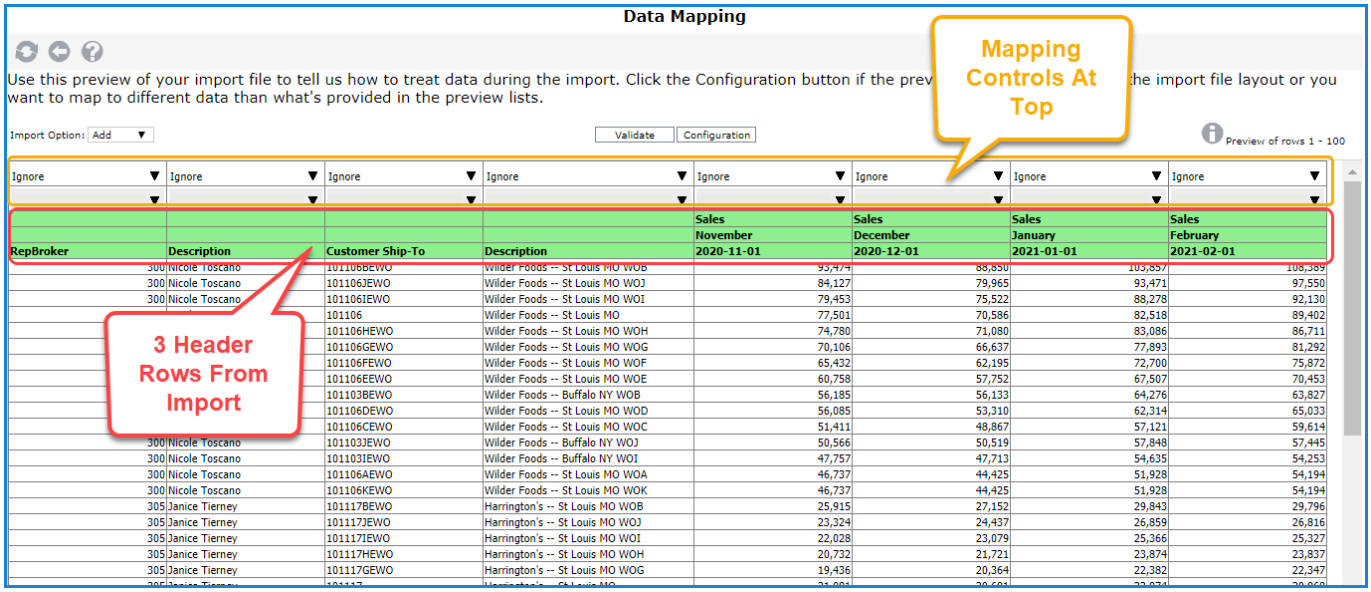
The next example import file has sales data that will be imported to populate a forecast. There are three header rows at the top. Each column of measure data is for a different transaction date. The transaction dates are in the third header row. RepBroker and Customer Ship-To are the dimensions in the file.

**Note:** See also Example Import Using A Time Series Import File.

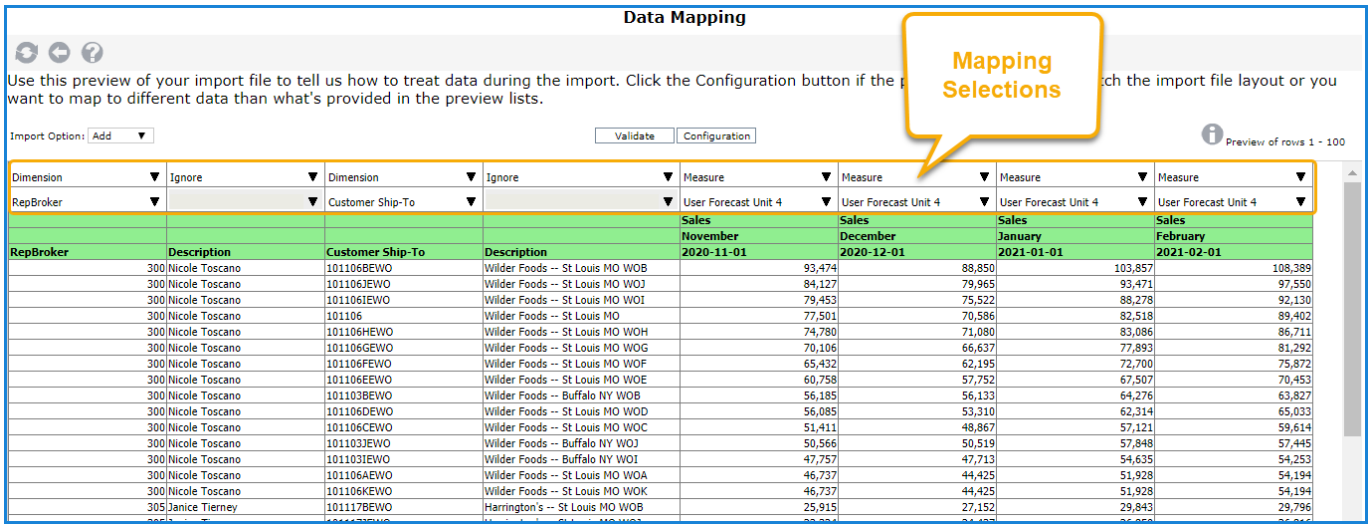



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | | | | | Sales | Sales | Sales | Sales |
| 2 | | | | | November | December | January | February |
| 3 | RepBroker | Description | Customer Ship-To | Description | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods -- St Louis MO WOB | 93,474 | 88,650 | 103,657 | 106,389 |
| 5 | 300 | Nicole Tosc | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 | 97,550 |
| 6 | 300 | | 101106IEWO | Wilder Foods -- St Louis MO WOI | 79,453 | 75,522 | 88,278 | 92,130 |
| 7 | 300 | | 101106 | Wilder Foods -- St Louis MO | 77,50 | | 82,518 | 89,402 |
| 8 | 300 | | 101106HEWO | Wilder Foods -- St Louis MO WOH | 74,78 | | 83,086 | 86,711 |
| 9 | 300 | | 101106GEWO | Wilder Foods -- St Louis MO WOG | 70,10 | | 77,893 | 81,292 |
| 10 | 300 | | 101106FEWO | Wilder Foods -- St Louis MO WOF | 65,43 | | 72,700 | 75,872 |
| 11 | 300 | Nicole Toscano | 101106EEWO | Wilder Foods -- St Louis MO WOE | 60,758 | | 67,507 | 70,453 |
| 12 | 300 | Nicole Toscano | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 | 63,827 |
| 13 | 300 | Nicole Toscano | 101106DEWO | Wilder Foods -- St Louis MO WOD | 56,085 | 53,310 | 62,314 | 65,033 |
| 14 | 300 | Nicole Toscano | 101106CEWO | Wilder Foods -- St Louis MO WOC | 51,411 | 48,867 | 57,121 | 59,614 |
| 15 | 300 | Nicole Toscano | 101103JEWO | Wilder Foods -- Buffalo NY WOJ | 50,566 | 50,519 | 57,848 | 57,445 |
| 16 | 300 | Nicole Toscano | 101103IEWO | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 | 54,253 |
| 17 | 300 | Nicole Toscano | 101106AEWO | Wilder Foods -- St Louis MO WOA | 46,737 | 44,425 | 51,928 | 54,194 |
| 18 | 300 | Nicole Toscano | 101106KEWO | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 | 54,194 |
| 19 | 305 | Janice Tierney | 101117BEWO | Harrington's -- St Louis MO WOB | 25,915 | 27,152 | 29,843 | 29,796 |
| 20 | 305 | Janice Tierney | 101117JEWO | Harrington's -- St Louis MO WOJ | 23,324 | 24,437 | 26,859 | 26,816 |
| 21 | 305 | Janice Tierney | 101117IEWO | Harrington's -- St Louis MO WOI | 22,028 | 23,079 | 25,366 | 25,327 |

Here's what a preview of the import file data looks like in Viewer's Data Mapping window **before** it's been mapped to any Stratum data. The header rows are highlighted in green to distinguish them from the rest of the file and from Data Import properties that get used during mapping.




Here's the preview of the file's data **after** mapping selections were made. Some columns containing descriptive information were left set to "Ignore" because the data they contain is not intended to be imported.




## Data Import Requirements Checklist

A Stratum implementation that uses Data Import must meet the following server and software requirements. With these conditions met, administrators can finalize setup of Data Import in Stratum Viewer – see the topic Data Import Initial Setup Checklist. Then, Data Imports can be added and processed by users.

**Note:** There's a few Data Import implementation steps that need to be taken care of before you can do Data Import setup in Stratum.Viewer. For details about those steps and assistance with them, contact your Silvon Sales Representative at (800) 874-5866 or email us at info@silvon.com.

1. The Stratum.Server application for the implementation must be on a Windows SQL server. Data Import is not available for implementations running Stratum.Server on an IBM i Server.

2. Stratum.Connector and Stratum.Viewer must be upgraded to version 7.1 or greater. If they aren't at 7.1 yet, obtain the necessary software and upgrade as you have in the past using the separate install/upgrade guide for instructions.

3. The Stratum.Viewer implementation must have a valid license for the Stratum Analyst Hub. If you don't have the Stratum Analyst Hub, contact your Silvon Sales Representative at (800) 874-5866 or email us at info@silvon.com. A registration key for a valid license must be specified in the Stratum Analyst Hub section of the Viewer Application window.

## Data Import Initial Setup Checklist

Here's a few things administrators need to do in Stratum.Viewer to prepare Data Import functionality for users. After this setup has been completed, users can access Data Import features in Stratum.Viewer to add and process their data imports.

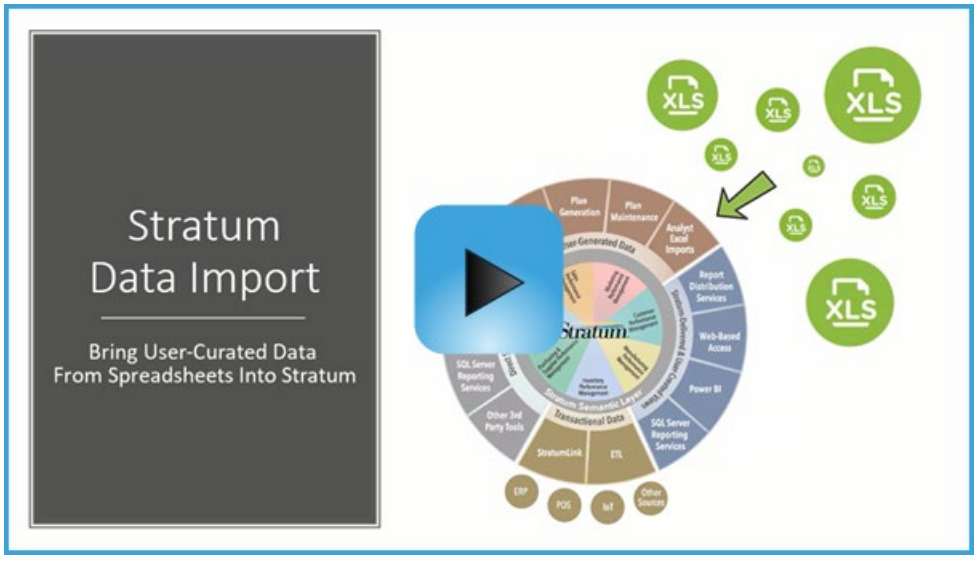
1. **Stratum.Viewer Application Settings** –

   - Verify a registration key is specified in the Stratum Analyst Hub section of the Application window. Data Import is part of the Stratum Analyst Hub.
   - Specify an upload file location for Data Imports using the Data Import property in the Stratum Analyst Hub section of the Application window. Copies of import data files are stored in that location. Import files are your Microsoft Excel files that contain imported data. See Specify Upload Location.

2. **Stratum.Viewer Category Control** – Categories that will be the Target of Data Imports need to be specified as 'User Controlled' Categories. Only measures belonging to those categories can have data imported into them via Data Import. See Make Categories User Controlled & Available For Use With Data Import Functionality.

## Data Import Video

Click below to watch a quick video introduction of the Data Import process.



# Tasks – Setting Up Data Import For Users

## Make Categories User Controlled & Available For Use With Data Import Functionality

Categories that will be the Target of Data Imports need to be specified as 'User Controlled' categories. Only measures belonging to those categories can have data imported into them via Data Import functionality in Stratum.Viewer. All measures in a User controlled category are potential Target measures for imports. Target measures are the ones that receive the imported data.

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

2. In the Category window, change the Data Controlled By property to User for each Category that needs to be used with Data Import functionality.

3. Save  your changes.

## Specify Upload File Location For Data Imports

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

2. Scroll to the Upload File Location properties in the Stratum Analyst Hub section of the Application window.

3. Use the Data Import property to specify the path for the folder that will be used by Data Imports. The Data Import location is used when importing values into User Controlled Measures.

    - 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\
    - The location must be one that exists already and one to which your implementation's Viewer Impersonation account has access rights.

4. Save  the changes.

# Tasks – Using Data Import Features

## Add a Data Import

1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.

2. In the Data Import list window, click New  .

3. When prompted, choose the Excel file to import. Then click Open.

4. Use the Import Configuration window to select the Target category for the import and make other selections to begin telling Data Import about the data in the file. The Target category is where imported data will be allocated and impacts the measures available during Step 5.

**Note:** Once you have done a few imports, Data Import learns about your import data habits and can do some automatic configuration and Data Mapping. When that happens, the Import Configuration window is bypassed. You can open it anytime by clicking the Configuration button in the Data Mapping window.

- **Import Option** – Choose to Add the imported data or Replace existing data with imported data. A Replace clears existing data from ALL measures of the Target category then adds the new data.
- **Target Category** – The Target category is the one that will receive imported data. Measures from that category will be available to select when you map imported data to Stratum.
- **Format** – Format is either Transactions or Time Series. Transaction means the dates for an import are in a column in a file. Time Series means dates are in a header row across the top of the file. The remaining selections to make depend on the selected import format.
  - **Transactions** – with this type, you also need to identify how many header rows are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension, descriptions, or measure names.
  - **Time Series** – with this type, you need to identify how many header rows are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension or measure names. You also need to identify which header row contains the transaction date for each measure column in the import file and the date format.

5. Use the Data Mapping window to finish telling Stratum what dimensions and measure data are in the import file. Drop-down lists are provided at the top of the data preview. Use them to make mapping selections.

   - **Ignore** – For any columns you don't want considered, select Ignore.

   - **Dimension** – Choose Dimension for columns that contain dimension details, then use the Select A Target drop-down list to select the name of the Target Stratum dimension for the data.
   - **Measure** – Choose Measure for columns that contain measure data (units, amounts, other), then use the Select A Target drop-down list to select the name of the Target Stratum measure for the data.
   - **Date** – If you are working with a Transaction type of import file, one of your columns needs to be identified as the Date column. Choose Date for that column and then select the format associated with the import file's dates. This selection does not apply to imports that are Time Series type because that date information is contained in a Header Row (see Step 4 where row and format for the dates are specified).

6. Click the Validate button to check that import data is in the proper format and contains the needed details to proceed.

7. Data Imports are meant to be processed after you are done mapping their data to Stratum. Click the Submit The Data Import For Processing  icon.

## Adjust Data Mapping And Import Configuration

You can edit an import's mapping and other configuration details at any time while previewing the data.

### *Configuration*

To adjust details like the Target category for the import or properties that indicate things like the number of header rows, click the Configuration button. Use the Import Configuration window to make changes, then click OK.

- **Import Option** – Add appends data to existing data. Replace clears existing data from ALL measures of the Target category then adds the new data.
- **Target Category** – The category that will receive imported data. Measures and dimensions from that category will be available to select when you map imported data to Stratum.
- **Format** – Format is either Transaction or Time Series. Transaction means the dates for an import are in a column in a file. Time Series means dates are in a header row across the top of the file. The remaining selections to make depend on the selected import format.
  - **Transaction** – with this type, you also need to identify how many header rows are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension, descriptions, or measure names.
  - **Time Series** – with this type, you need to identify how many header rows are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension or measure names. You also need to identify which header row contains the transaction dates for each measure column in the import file and the date format.

### *Mapping*

Use the provided drop-down selection lists in the preview to adjust mapping for each column in the import.

- **Ignore** – For any columns you don't want considered, select Ignore.
- **Dimension** – Choose Dimension for columns that contain dimension details, then use the Select A Target drop-down list to select the name of the Target Stratum dimension for the data.
- **Measure** – Choose Measure for columns that contain measure data (units, amounts, other), then use the Select A Target drop-down list to select the name of the Target Stratum measure for the data.
- **Date** – If you are working with a Transaction type of import file, one of your columns needs to be identified as the Date column. Choose Date for that column and then select the format associated with the import file's dates. This selection does not apply to imports that are Time Series type because that date information is contained in a Header Row (see Step 4 where row and format for the dates are specified).

## Delete a Data Import

1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.
2. In the Data Import list window, select the Data Import you need to delete.
3. Click Delete  .
4. Click Yes in the prompt that displays to proceed with the deletion.

## Process a Data Import

Data imports are processed from the Data Mapping window. Once you're done mapping the import to Stratum data and validating it, click the Submit The Data Import For Processing  icon in its maintenance window.

## Imports With Time in Every Row of Import File (Transactions Import Type)

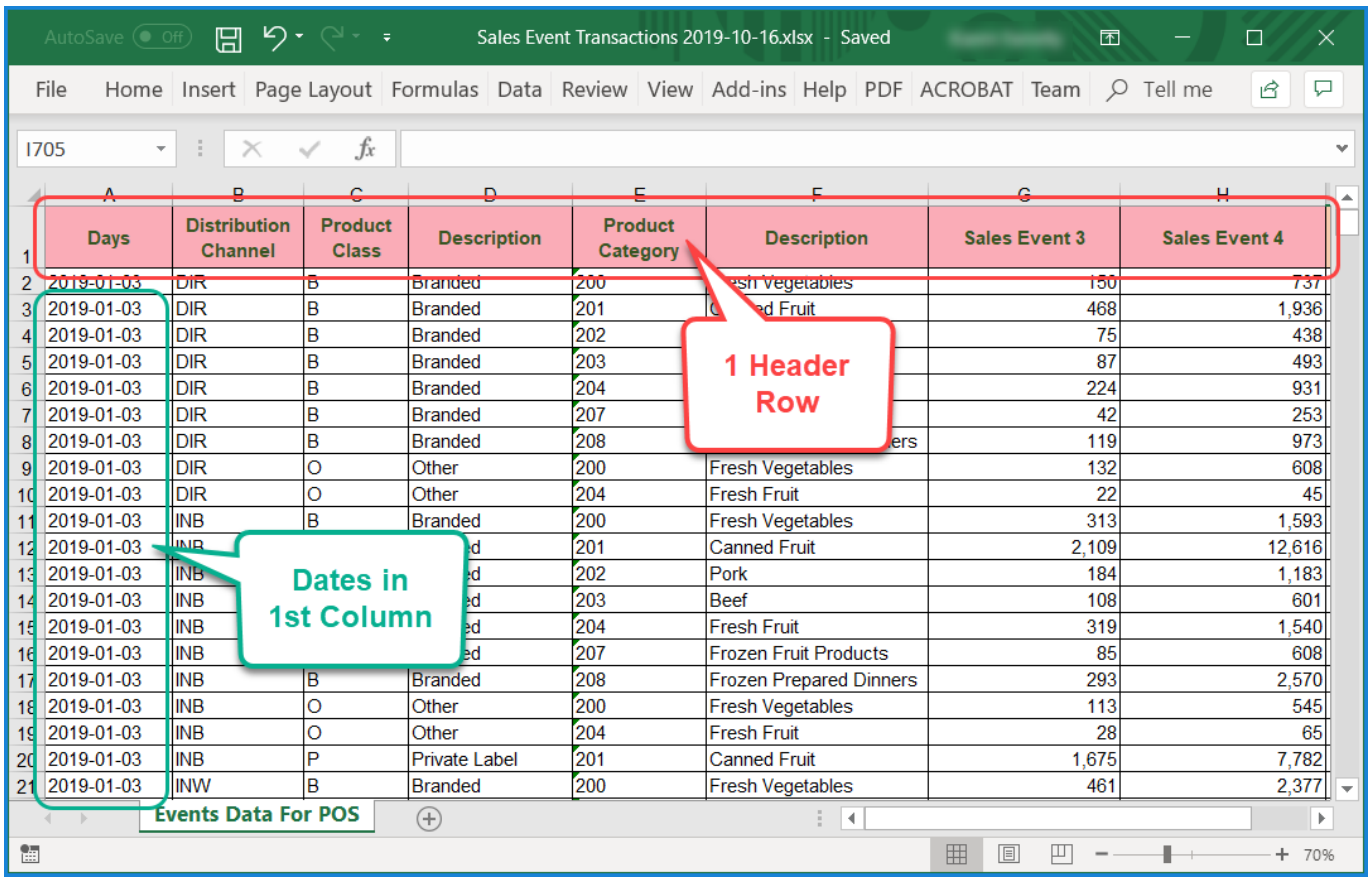
One way to set up your import file is to include the transaction dates for your import data in a single column of the file. This type of import is known as a Transactions import file and means you will set the import configuration properties to the Transaction type. The following import file is set up that way. Read on to see key parts of the file and how it was imported.

**Note:** See also the video How It Works: Stratum Data Import and the topic Import File Types: Transactions Or Time Series.

### *1. Set Up Import File*

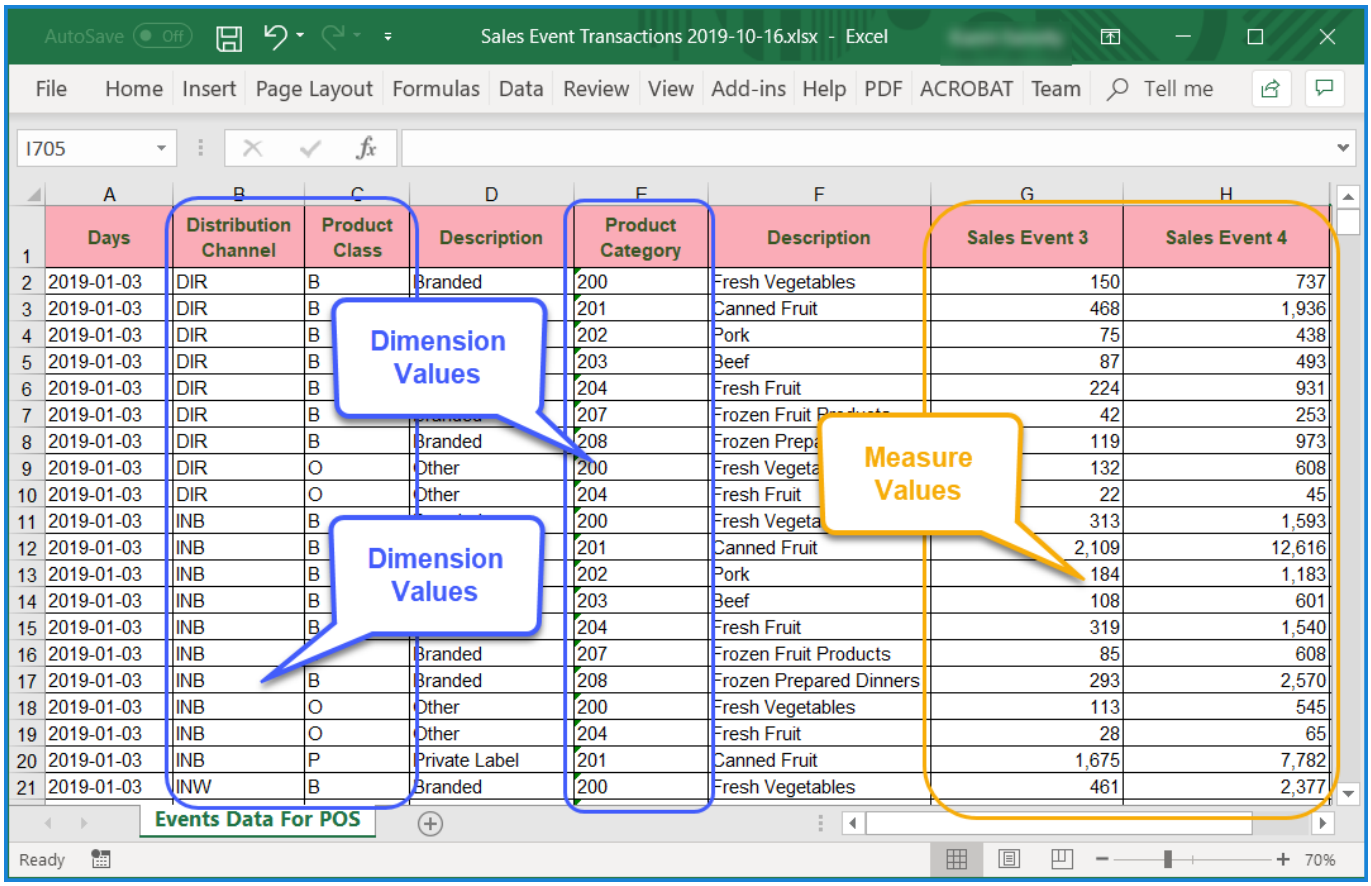
This import file's transaction dates are in the first column, and the column was given a heading of "Days" in a header row at the top. Header rows have descriptive information that aid in mapping the import data to Stratum data – but information in the header rows don't get imported. You can include more header rows if needed, but including them in the file is optional for this Transaction type of import.

**Note:** See Tips For Setting Up Your Import for full detail about how to set up an import file.




| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Days | Distribution Channel | Product Class | Description | Product Category | Description | Sales Event 3 | Sales Event 4 |
| 2 | 2019-01-03 | DIR | B | Branded | 200 | Fresh Vegetables | 150 | 737 |
| 3 | 2019-01-03 | DIR | B | Branded | 201 | Canned Fruit | 468 | 1,936 |
| 4 | 2019-01-03 | DIR | B | Branded | 202 | Pork | 75 | 438 |
| 5 | 2019-01-03 | DIR | B | Branded | 203 | Beef | 87 | 493 |
| 6 | 2019-01-03 | DIR | B | Branded | 204 | Fresh Fruit | 224 | 931 |
| 7 | 2019-01-03 | DIR | B | Branded | 207 | Frozen Fruit Products | 42 | 253 |
| 8 | 2019-01-03 | DIR | B | Branded | 208 | Frozen Prepared Dinners | 119 | 973 |
| 9 | 2019-01-03 | DIR | O | Other | 200 | Fresh Vegetables | 132 | 608 |
| 10 | 2019-01-03 | DIR | O | Other | 204 | Fresh Fruit | 22 | 45 |
| 11 | 2019-01-03 | INB | B | Branded | 200 | Fresh Vegetables | 313 | 1,593 |
| 12 | 2019-01-03 | INB | | | 201 | Canned Fruit | 2,109 | 12,616 |
| 13 | 2019-01-03 | INB | | | 202 | Pork | 184 | 1,183 |
| 14 | 2019-01-03 | INB | | | 203 | Beef | 108 | 601 |
| 15 | 2019-01-03 | INB | | | 204 | Fresh Fruit | 319 | 1,540 |
| 16 | 2019-01-03 | INB | | | 207 | Frozen Fruit Products | 85 | 608 |
| 17 | 2019-01-03 | INB | B | Branded | 208 | Frozen Prepared Dinners | 293 | 2,570 |
| 18 | 2019-01-03 | INB | O | Other | 200 | Fresh Vegetables | 113 | 545 |
| 19 | 2019-01-03 | INB | O | Other | 204 | Fresh Fruit | 28 | 65 |
| 20 | 2019-01-03 | INB | P | Private Label | 201 | Canned Fruit | 1,675 | 7,782 |
| 21 | 2019-01-03 | INW | B | Branded | 200 | Fresh Vegetables | 461 | 2,377 |

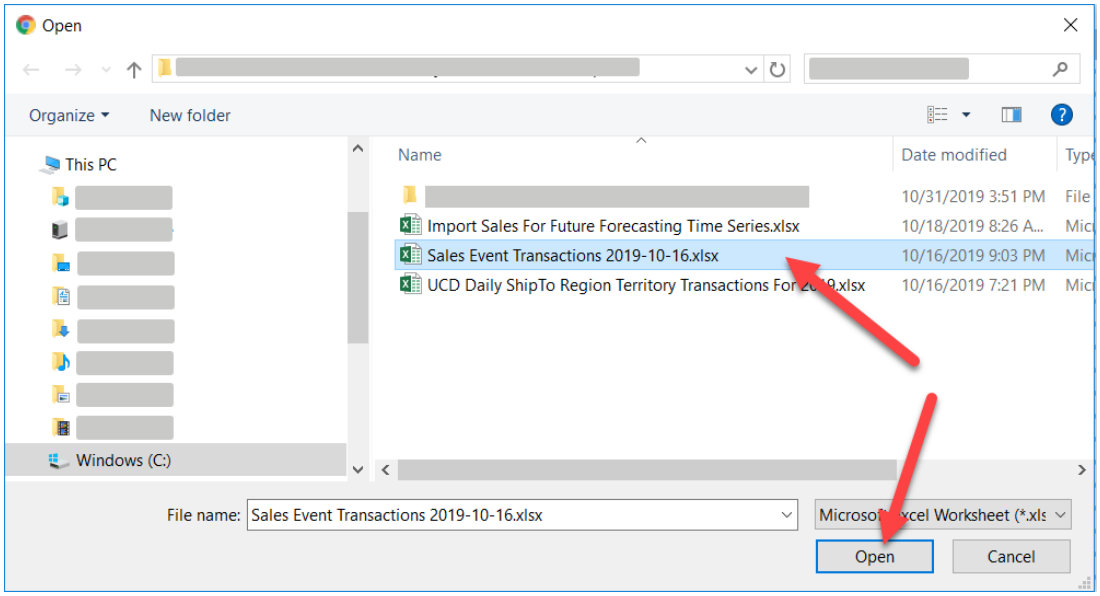
The transaction date tells Data Import the year and period each row of data belongs when it is imported into Stratum. The other columns in the file contain dimension values that tell Data Import where the imported data belongs and contain the actual measure values that will get imported for those dimensions. The user plans to use the imported Sales Event data to populate POS measures.




| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Days | Distribution Channel | Product Class | Description | Product Category | Description | Sales Event 3 | Sales Event 4 |
| 2 | 2019-01-03 | DIR | B | Branded | 200 | Fresh Vegetables | 150 | 737 |
| 3 | 2019-01-03 | DIR | B | | 201 | Canned Fruit | 468 | 1,936 |
| 4 | 2019-01-03 | DIR | B | | 202 | Pork | 75 | 438 |
| 5 | 2019-01-03 | DIR | B | | 203 | Beef | 87 | 493 |
| 6 | 2019-01-03 | DIR | B | | 204 | Fresh Fruit | 224 | 931 |
| 7 | 2019-01-03 | DIR | B | | 207 | Frozen Fruit Products | 42 | 253 |
| 8 | 2019-01-03 | DIR | B | Branded | 208 | Frozen Prepa | 119 | 973 |
| 9 | 2019-01-03 | DIR | O | Other | 200 | Fresh Vegeta | 132 | 608 |
| 10 | 2019-01-03 | DIR | O | Other | 204 | Fresh Fruit | 22 | 45 |
| 11 | 2019-01-03 | INB | B | | 200 | Fresh Vegeta | 313 | 1,593 |
| 12 | 2019-01-03 | INB | B | | 201 | Canned Fruit | 2,109 | 12,616 |
| 13 | 2019-01-03 | INB | B | | 202 | Pork | 184 | 1,183 |
| 14 | 2019-01-03 | INB | B | | 203 | Beef | 108 | 601 |
| 15 | 2019-01-03 | INB | B | | 204 | Fresh Fruit | 319 | 1,540 |
| 16 | 2019-01-03 | INB | | Branded | 207 | Frozen Fruit Products | 85 | 608 |
| 17 | 2019-01-03 | INB | B | Branded | 208 | Frozen Prepared Dinners | 293 | 2,570 |
| 18 | 2019-01-03 | INB | O | Other | 200 | Fresh Vegetables | 113 | 545 |
| 19 | 2019-01-03 | INB | O | Other | 204 | Fresh Fruit | 28 | 65 |
| 20 | 2019-01-03 | INB | P | Private Label | 201 | Canned Fruit | 1,675 | 7,782 |
| 21 | 2019-01-03 | INW | B | Branded | 200 | Fresh Vegetables | 461 | 2,377 |

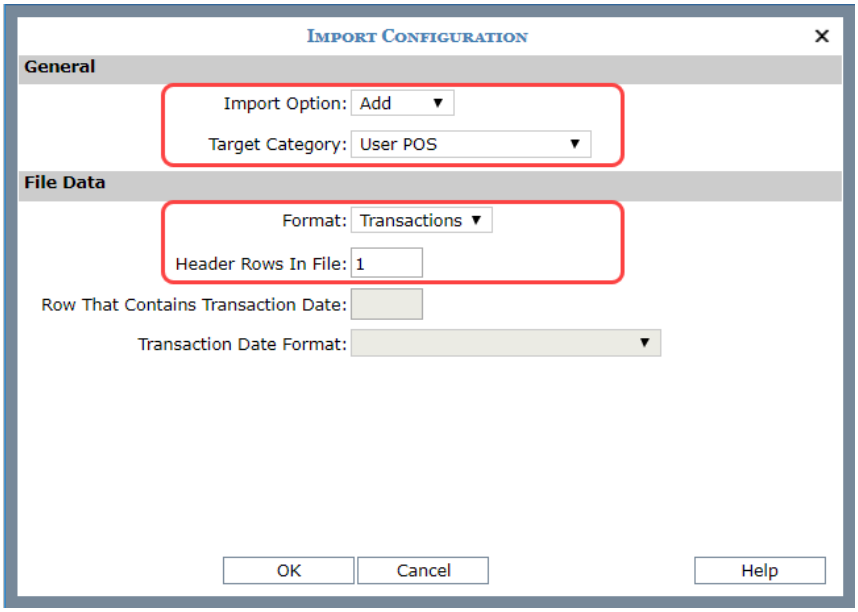
## 2. Open File & Set Up Import Properties

An import starts with choosing the Excel file.




As the file is uploaded, you get prompted to configure the import. This is where you choose to Add to existing data or Replace existing data, pick the Target category for the import, and tell Data Import about import file properties.

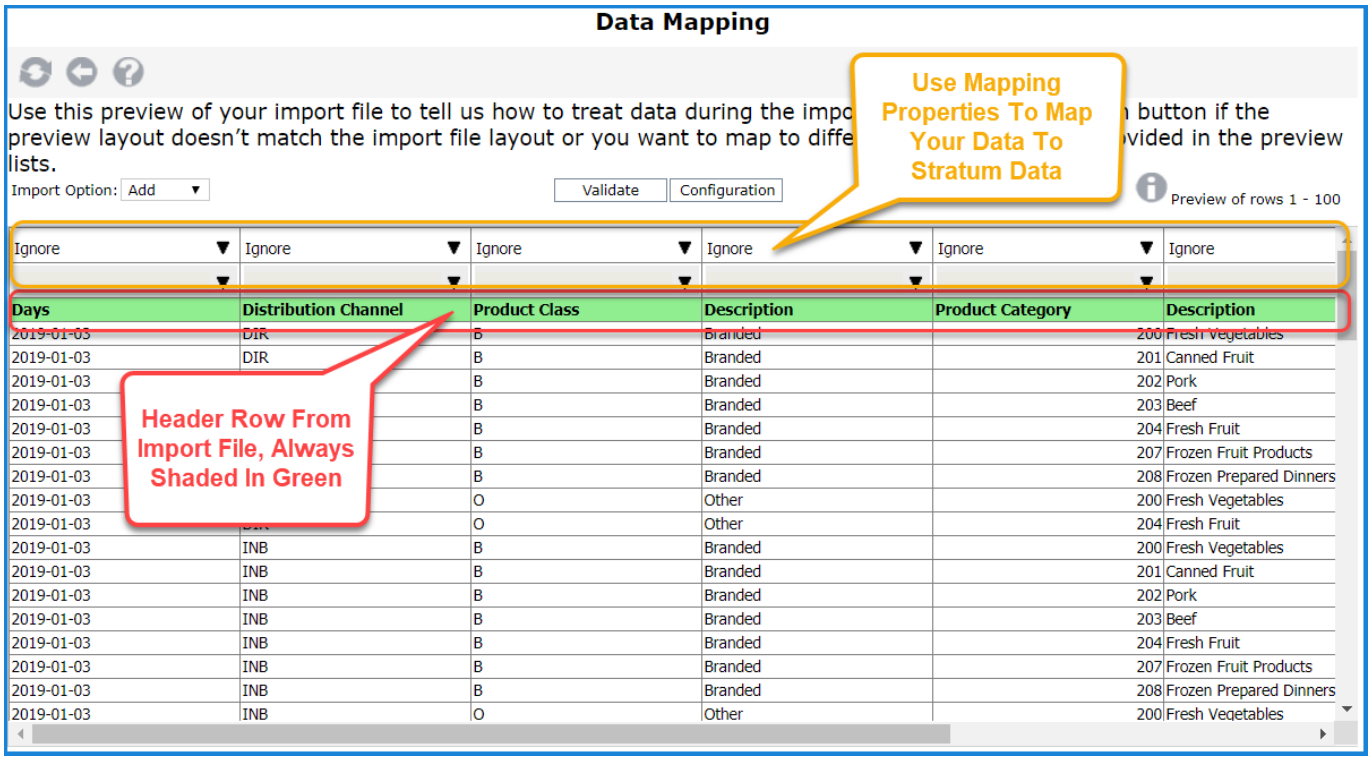
Since dates are in every row in this example, type is left at the default of Transactions. There is only one header row in this file, so that property is left at the default of 1. The date format matches the default setting too, so there was nothing to change there.



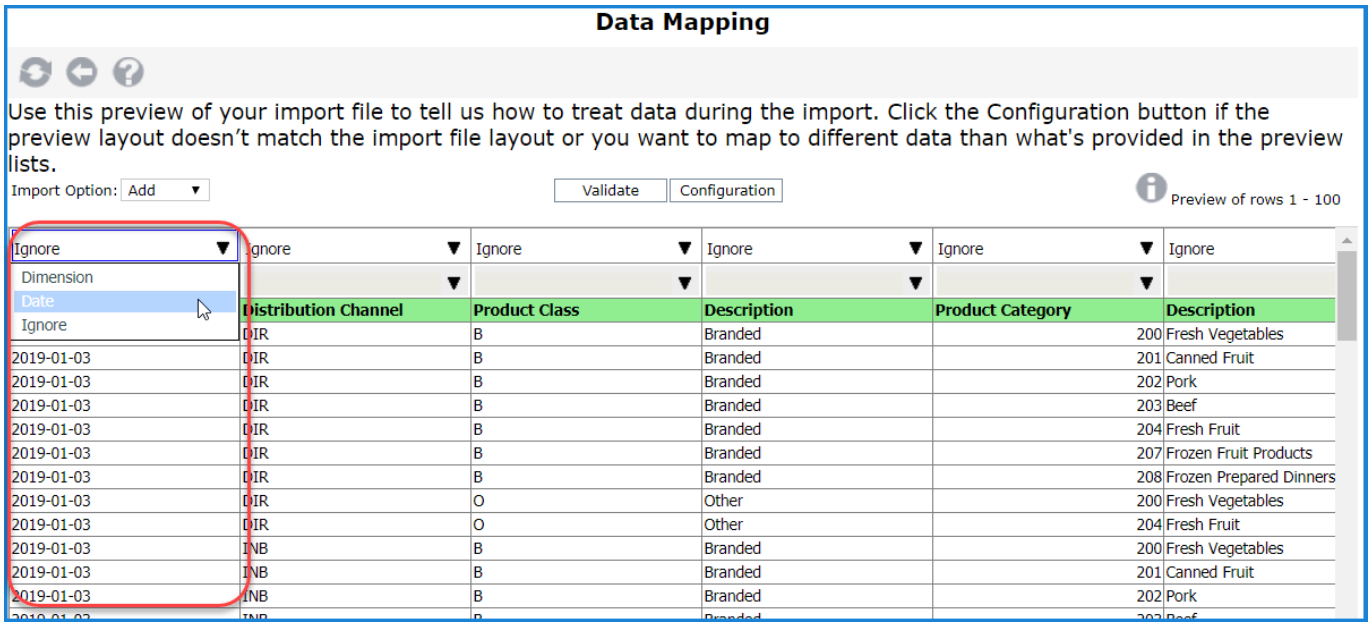

### 3. Map To Stratum Data

The import file is uploaded into a mapping window for you to preview and match up import file contents to the Stratum items where they will be imported.

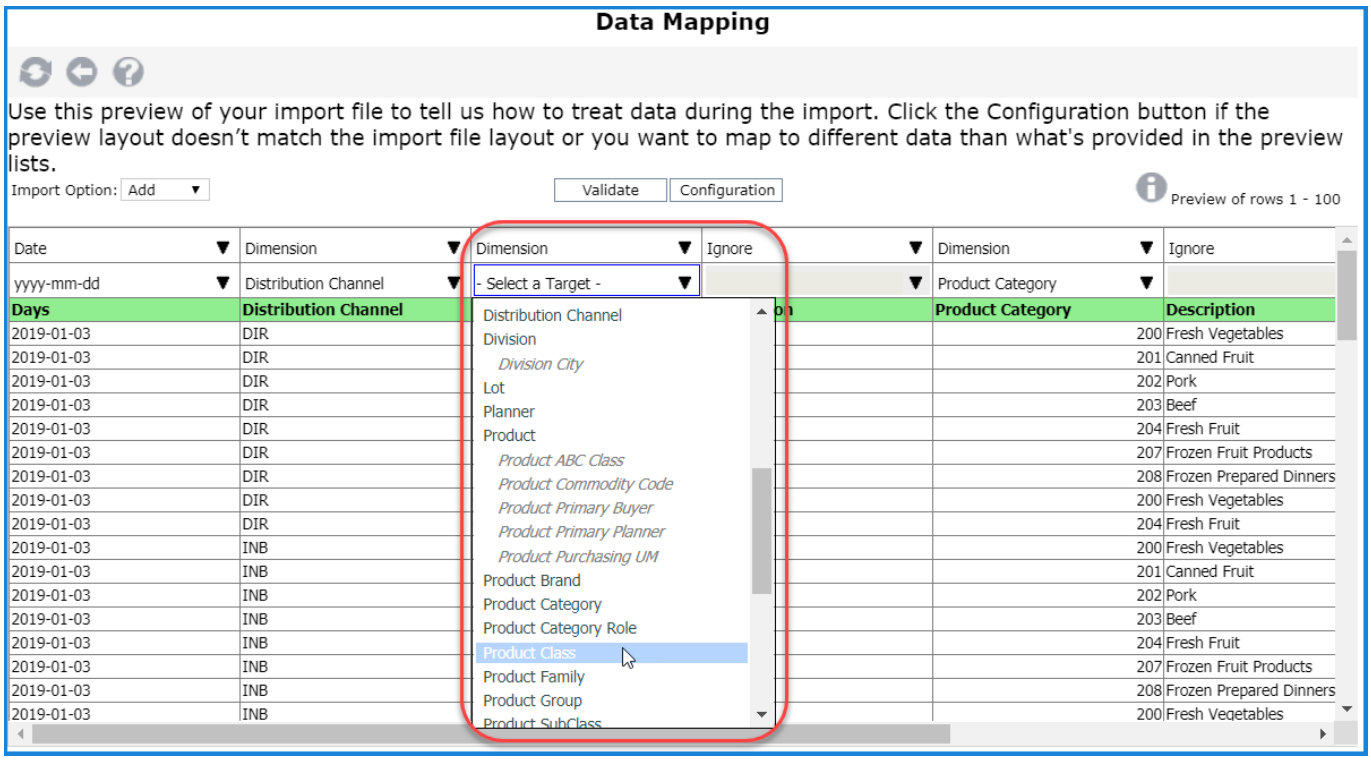
**Note:** As you do imports over time, Data Import will make some mapping selections for you automatically based on past patterns of what was imported and where it got imported.



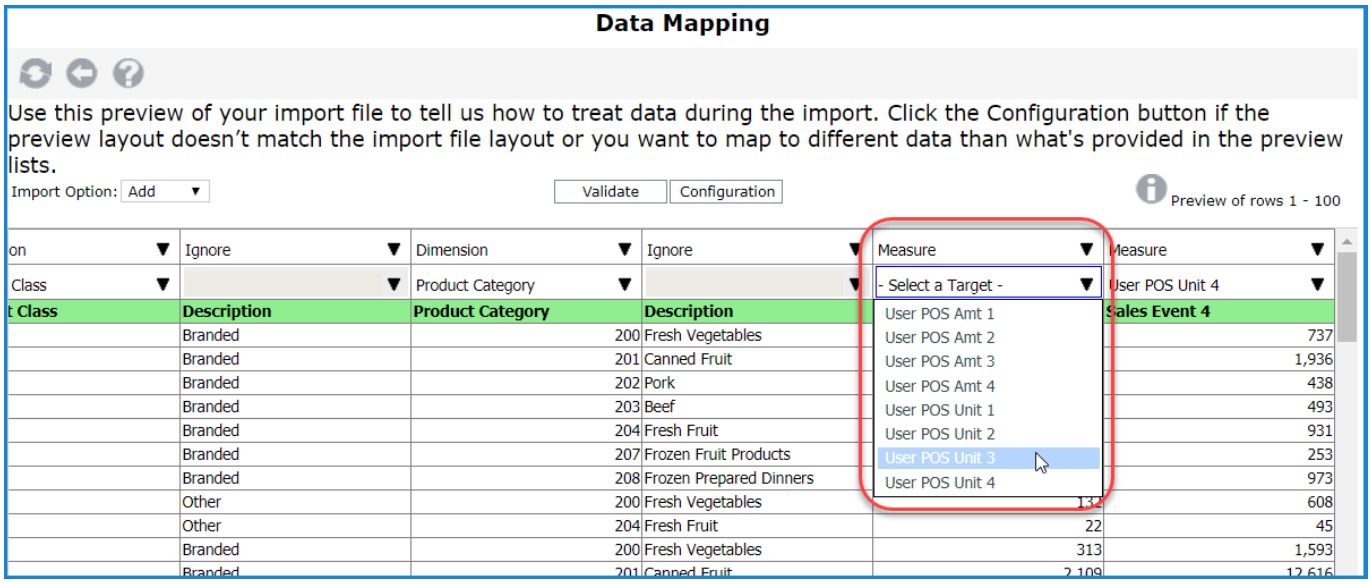
The drop-down lists above the header row are used to identify columns as dates, dimensions, and measures. Columns that don't need to be imported should be set to Ignore. Here's the date column being mapped.




Here's a dimension column being mapped to Product Class.

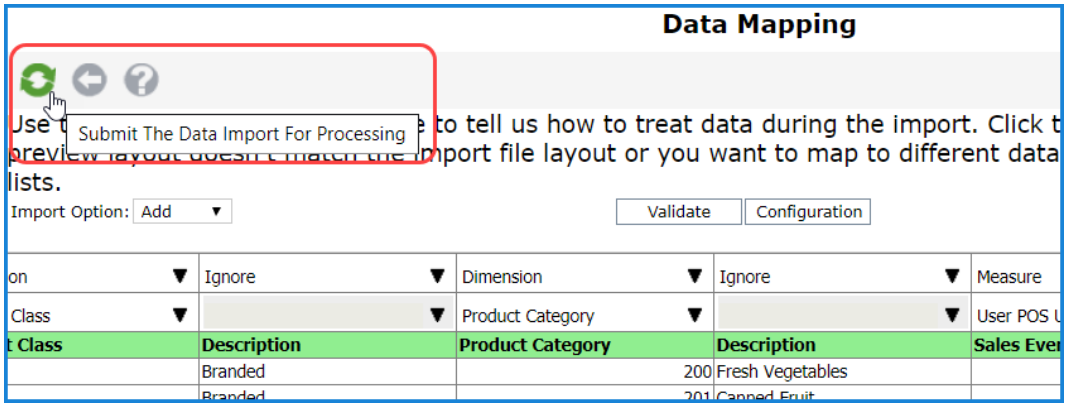


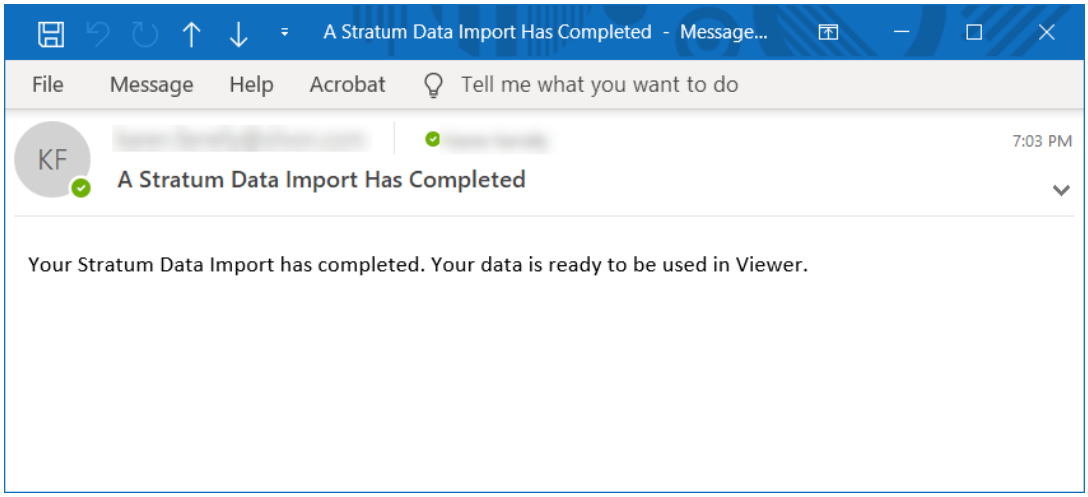
The columns containing dimension descriptions are set to ignore. Finally, here are the measure values being mapped to User POS measures from the Target User POS category.



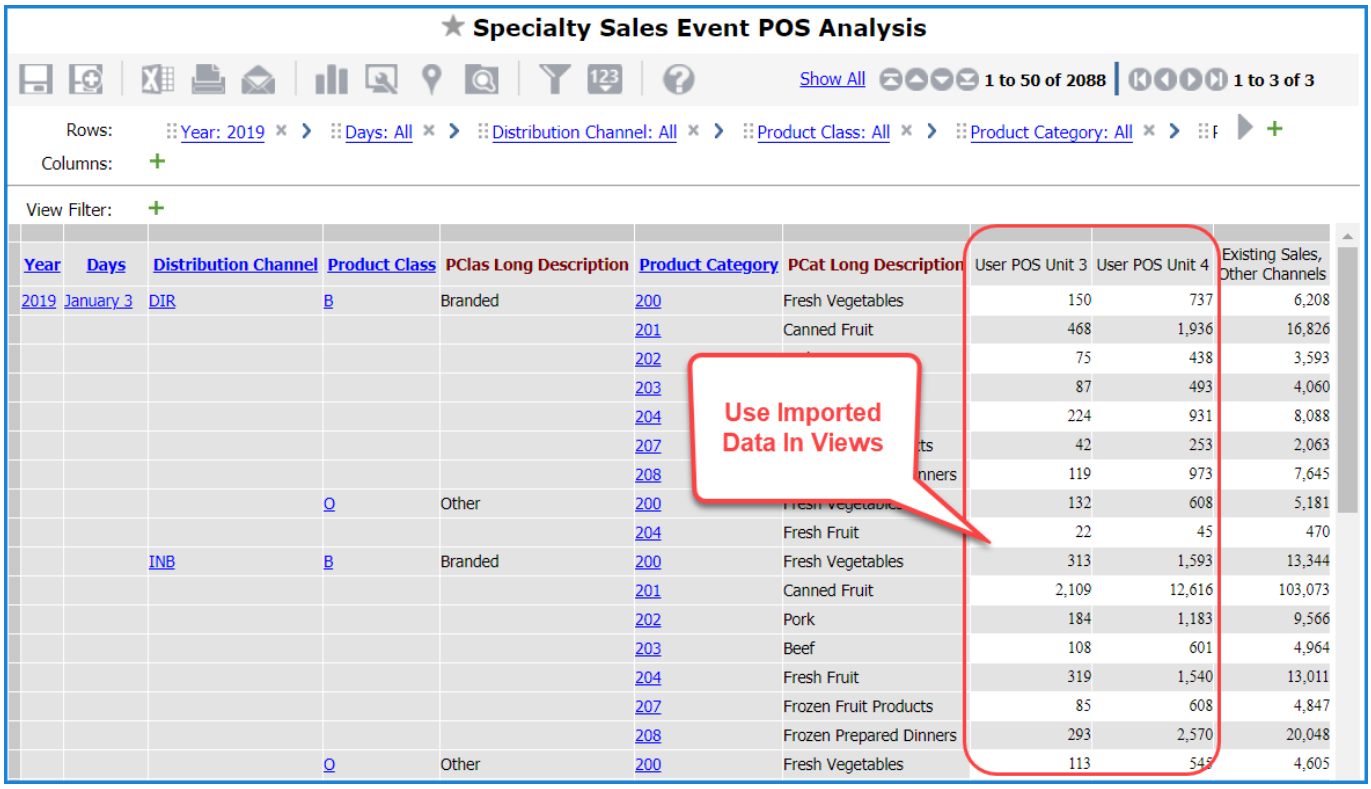

## 4. Use Data In Stratum

Some validations are done once you submit the import for processing. An email is sent to you once the import has finished processing. The data is ready to use in Stratum once the import has completed.



Here's the imported data in Viewer, ready for users to analyze in a central spot with other corporate or user supplied data.




| Year | Days | Distribution Channel | Product Class | PClas Long Description | Product Category | PCat Long Description | User POS Unit 3 | User POS Unit 4 | Existing Sales, Other Channels |
|---|---|---|---|---|---|---|---|---|---|
| 2019 | January 3 | DIR | B | Branded | 200 | Fresh Vegetables | 150 | 737 | 6,208 |
| | | | | | 201 | Canned Fruit | 468 | 1,936 | 16,826 |
| | | | | | 202 | | 75 | 438 | 3,593 |
| | | | | | 203 | | 87 | 493 | 4,060 |
| | | | | | 204 | | 224 | 931 | 8,088 |
| | | | | | 207 | | 42 | 253 | 2,063 |
| | | | | | 208 | | 119 | 973 | 7,645 |
| | | | O | Other | 200 | | 132 | 608 | 5,181 |
| | | | | | 204 | Fresh Fruit | 22 | 45 | 470 |
| | | INB | B | Branded | 200 | Fresh Vegetables | 313 | 1,593 | 13,344 |
| | | | | | 201 | Canned Fruit | 2,109 | 12,616 | 103,073 |
| | | | | | 202 | Pork | 184 | 1,183 | 9,566 |
| | | | | | 203 | Beef | 108 | 601 | 4,964 |
| | | | | | 204 | Fresh Fruit | 319 | 1,540 | 13,011 |
| | | | | | 207 | Frozen Fruit Products | 85 | 608 | 4,847 |
| | | | | | 208 | Frozen Prepared Dinners | 293 | 2,570 | 20,048 |
| | | | O | Other | 200 | Fresh Vegetables | 113 | 545 | 4,605 |

## Imports With Time in a Header Row of Import File (Time Series Import Type)

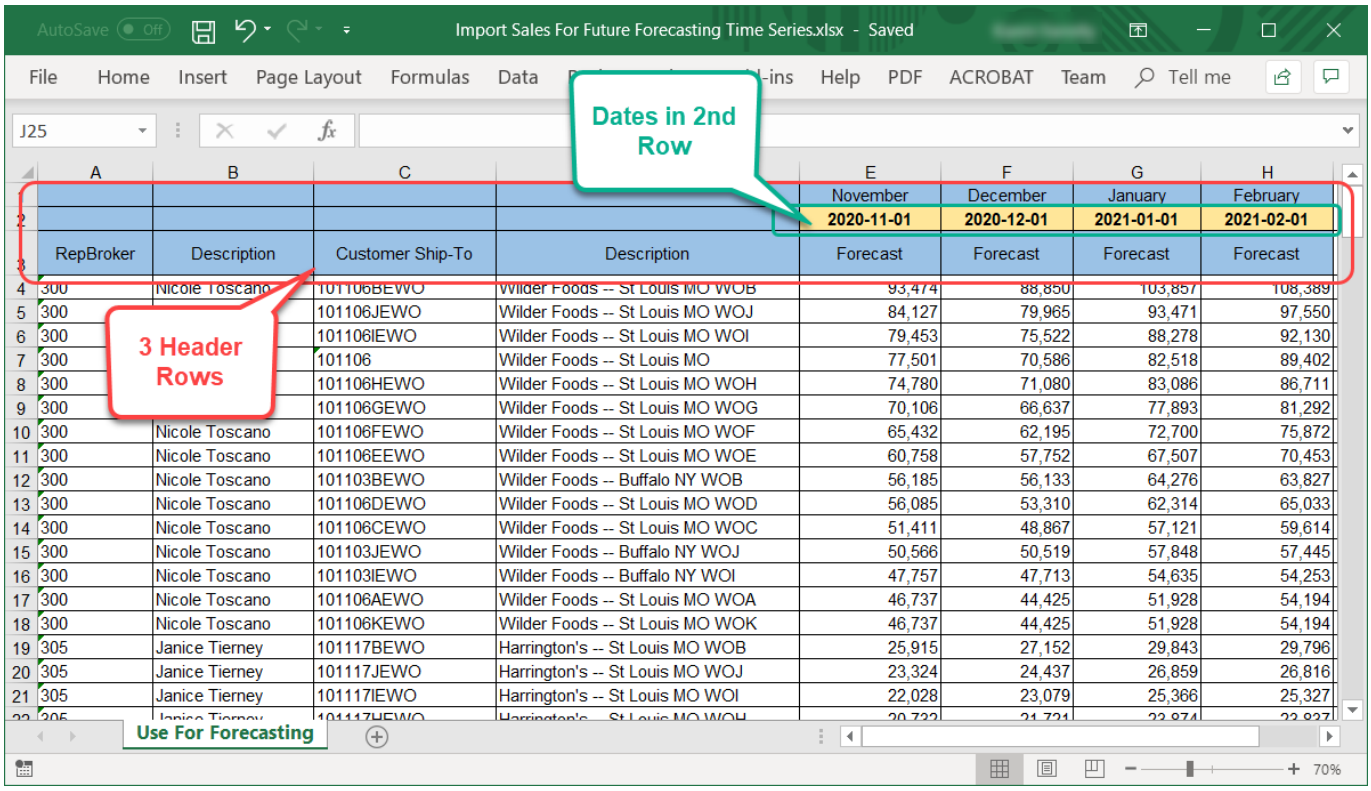
One way to arrange data in your import file is to include the transaction dates for your data in a header row at the top of the file, above the columns that contain measure values you plan to import. This type of import is known as a Time Series import file and means you will set the import configuration properties to the Time Series type and tell Data Import which header row contains the transaction dates. The following import file is set up that way. Read on to see key parts of the file and how it was imported.

**Note:** See also the video How It Works: Stratum Data Import and the topic Import File Types: Transactions Or Time Series.

### *1. Set Up Import File*

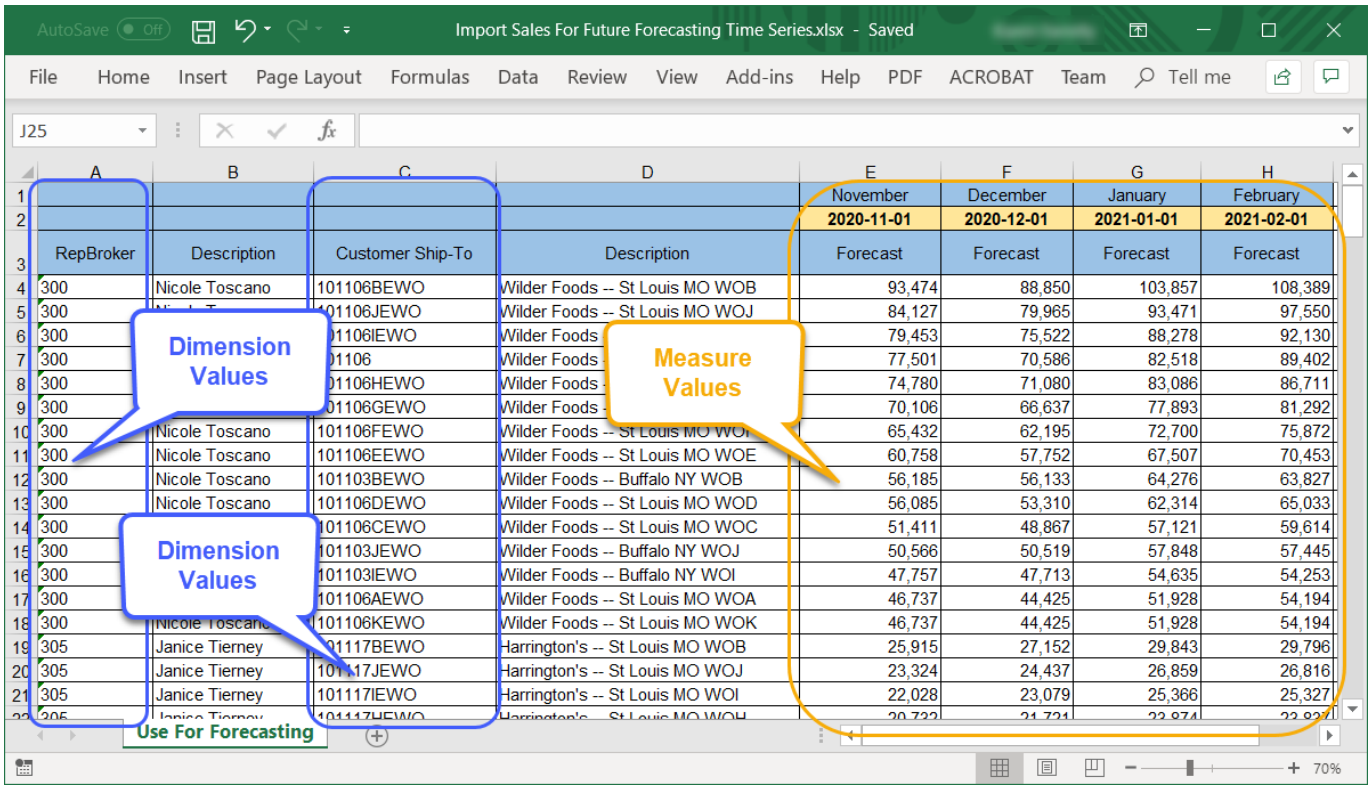
This import file has the transaction dates in the second header row. There must be a date over each column that contains measure data. The rows above and below the date row also are header rows. They have descriptive information that aids in mapping the import data to Stratum data. You can include more or less header rows if needed as long as there is at least one to supply the transaction dates for this Time Series type of import.

**Note:** See Tips For Setting Up Your Import for full detail about how to set up an import file.




| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | | | | | November | December | January | February |
| 2 | | | | | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 |
| 3 | RepBroker | Description | Customer Ship-To | Description | Forecast | Forecast | Forecast | Forecast |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods -- St Louis MO WOB | 93,474 | 88,850 | 103,857 | 108,389 |
| 5 | 300 | | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 | 97,550 |
| 6 | 300 | | 101106IEWO | Wilder Foods -- St Louis MO WOI | 79,453 | 75,522 | 88,278 | 92,130 |
| 7 | 300 | | 101106 | Wilder Foods -- St Louis MO | 77,501 | 70,586 | 82,518 | 89,402 |
| 8 | 300 | | 101106HEWO | Wilder Foods -- St Louis MO WOH | 74,780 | 71,080 | 83,086 | 86,711 |
| 9 | 300 | | 101106GEWO | Wilder Foods -- St Louis MO WOG | 70,106 | 66,637 | 77,893 | 81,292 |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods -- St Louis MO WOF | 65,432 | 62,195 | 72,700 | 75,872 |
| 11 | 300 | Nicole Toscano | 101106EEWO | Wilder Foods -- St Louis MO WOE | 60,758 | 57,752 | 67,507 | 70,453 |
| 12 | 300 | Nicole Toscano | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 | 63,827 |
| 13 | 300 | Nicole Toscano | 101106DEWO | Wilder Foods -- St Louis MO WOD | 56,085 | 53,310 | 62,314 | 65,033 |
| 14 | 300 | Nicole Toscano | 101106CEWO | Wilder Foods -- St Louis MO WOC | 51,411 | 48,867 | 57,121 | 59,614 |
| 15 | 300 | Nicole Toscano | 101103JEWO | Wilder Foods -- Buffalo NY WOJ | 50,566 | 50,519 | 57,848 | 57,445 |
| 16 | 300 | Nicole Toscano | 101103IEWO | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 | 54,253 |
| 17 | 300 | Nicole Toscano | 101106AEWO | Wilder Foods -- St Louis MO WOA | 46,737 | 44,425 | 51,928 | 54,194 |
| 18 | 300 | Nicole Toscano | 101106KEWO | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 | 54,194 |
| 19 | 305 | Janice Tierney | 101117BEWO | Harrington's -- St Louis MO WOB | 25,915 | 27,152 | 29,843 | 29,796 |
| 20 | 305 | Janice Tierney | 101117JEWO | Harrington's -- St Louis MO WOJ | 23,324 | 24,437 | 26,859 | 26,816 |
| 21 | 305 | Janice Tierney | 101117IEWO | Harrington's -- St Louis MO WOI | 22,028 | 23,079 | 25,366 | 25,327 |

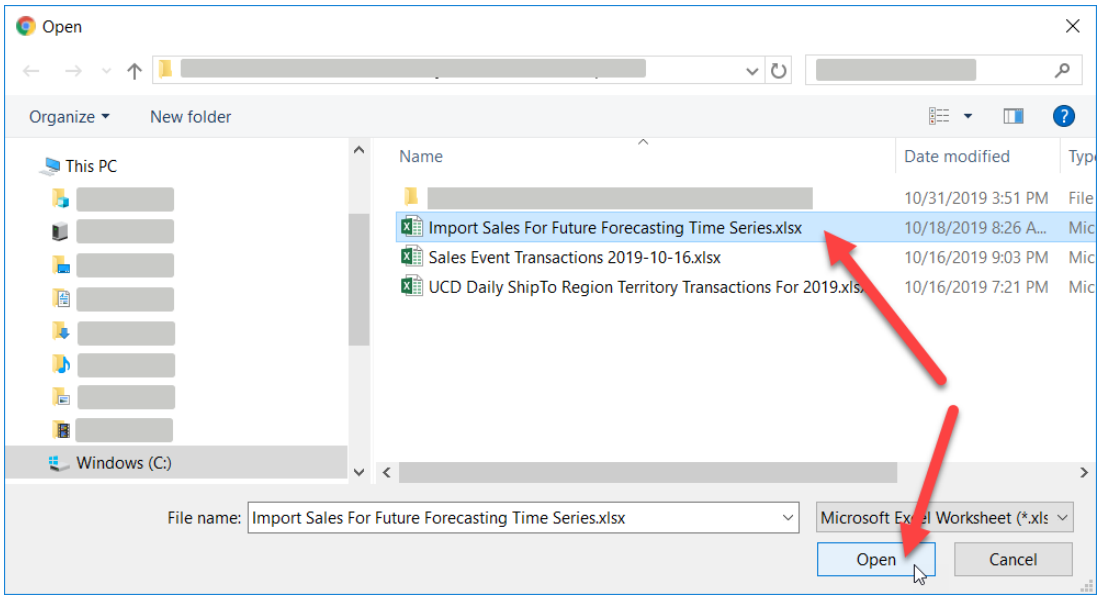
The dates in the second header row tell Data Import the year and period where the data belongs when it is imported into Stratum. The other columns in the file contain dimension values that tell Data Import where the imported data belongs and contain the actual measure values that will get imported for those dimensions. The user plans to use the imported data to populate Forecast measures.




| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | | | | | November | December | January | February |
| 2 | | | | | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 |
| 3 | RepBroker | Description | Customer Ship-To | Description | Forecast | Forecast | Forecast | Forecast |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods -- St Louis MO WOB | 93,474 | 88,850 | 103,857 | 108,389 |
| 5 | 300 | | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 | 97,550 |
| 6 | 300 | | 101106IEWO | Wilder Foods | 79,453 | 75,522 | 88,278 | 92,130 |
| 7 | 300 | | 01106 | Wilder Foods | 77,501 | 70,586 | 82,518 | 89,402 |
| 8 | 300 | | 01106HEWO | Wilder Foods | 74,780 | 71,080 | 83,086 | 86,711 |
| 9 | 300 | | 01106GEWO | Wilder Foods | 70,106 | 66,637 | 77,893 | 81,292 |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods -- St Louis MO WOI | 65,432 | 62,195 | 72,700 | 75,872 |
| 11 | 300 | Nicole Toscano | 101106EEWO | Wilder Foods -- St Louis MO WOE | 60,758 | 57,752 | 67,507 | 70,453 |
| 12 | 300 | Nicole Toscano | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 | 63,827 |
| 13 | 300 | Nicole Toscano | 101106DEWO | Wilder Foods -- St Louis MO WOD | 56,085 | 53,310 | 62,314 | 65,033 |
| 14 | 300 | | 101106CEWO | Wilder Foods -- St Louis MO WOC | 51,411 | 48,867 | 57,121 | 59,614 |
| 15 | 300 | | 101103JEWO | Wilder Foods -- Buffalo NY WOJ | 50,566 | 50,519 | 57,848 | 57,445 |
| 16 | 300 | | 101103IEWO | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 | 54,253 |
| 17 | 300 | | 101106AEWO | Wilder Foods -- St Louis MO WOA | 46,737 | 44,425 | 51,928 | 54,194 |
| 18 | 300 | | 101106KEWO | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 | 54,194 |
| 19 | 305 | Janice Tierney | 01117BEWO | Harrington's -- St Louis MO WOB | 25,915 | 27,152 | 29,843 | 29,796 |
| 20 | 305 | Janice Tierney | 101117JEWO | Harrington's -- St Louis MO WOJ | 23,324 | 24,437 | 26,859 | 26,816 |
| 21 | 305 | Janice Tierney | 101117IEWO | Harrington's -- St Louis MO WOI | 22,028 | 23,079 | 25,366 | 25,327 |

## 2. Open File & Set Up Import Properties

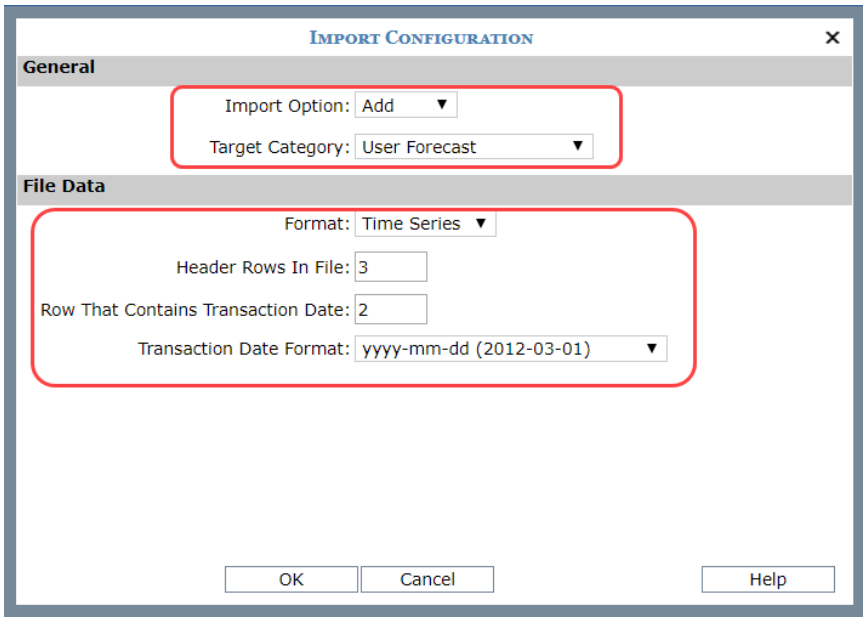
An import starts with choosing the Excel file.




As the file is uploaded, you get prompted to configure the import. This is where you choose to Add to existing data or Replace existing data, pick the Target category for the import, and tell Data Import about import file properties.

Since dates are in a header row at the top of the file in this example, the user chose Time Series as the type. They also set the header row property to 3 since the file has that number of header rows. The next property is set to 2

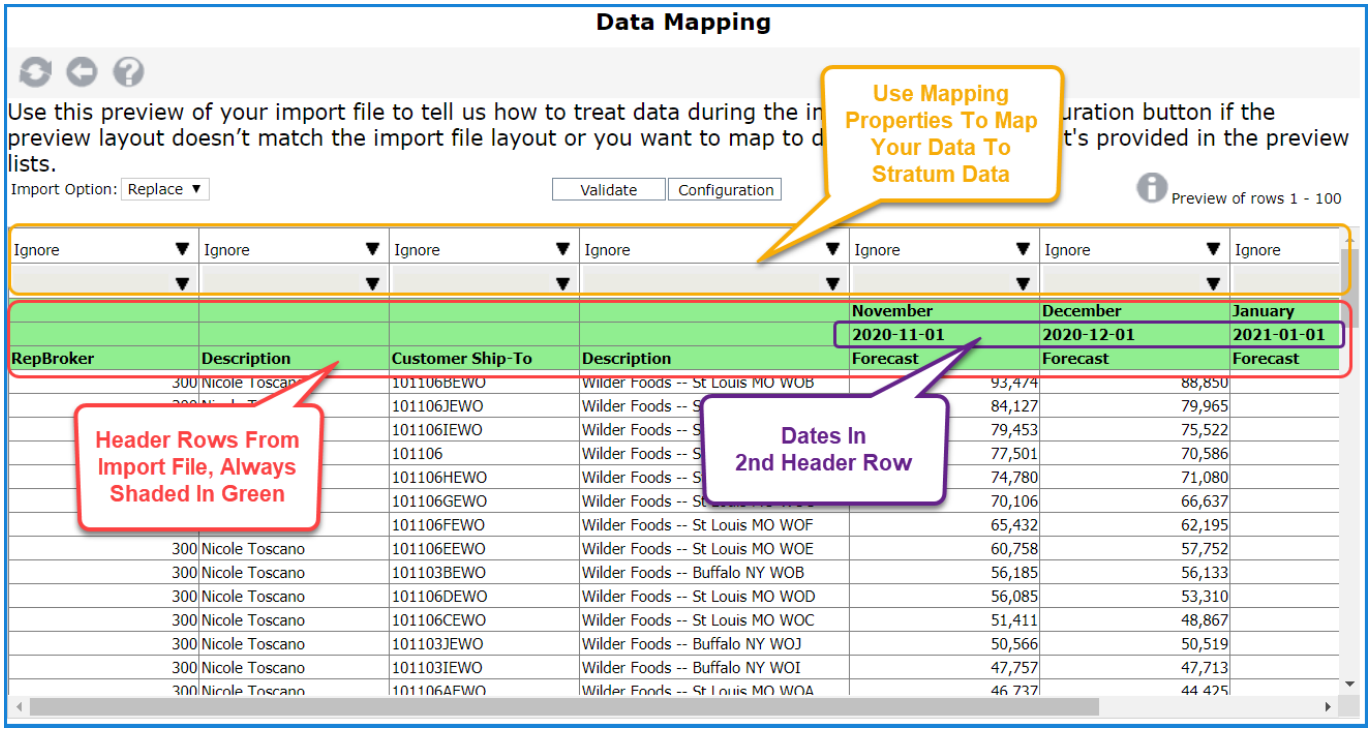
since transaction dates are in the second header row of this import file. The date format matches the default so that property is left as is.




### 3. Map To Stratum Data

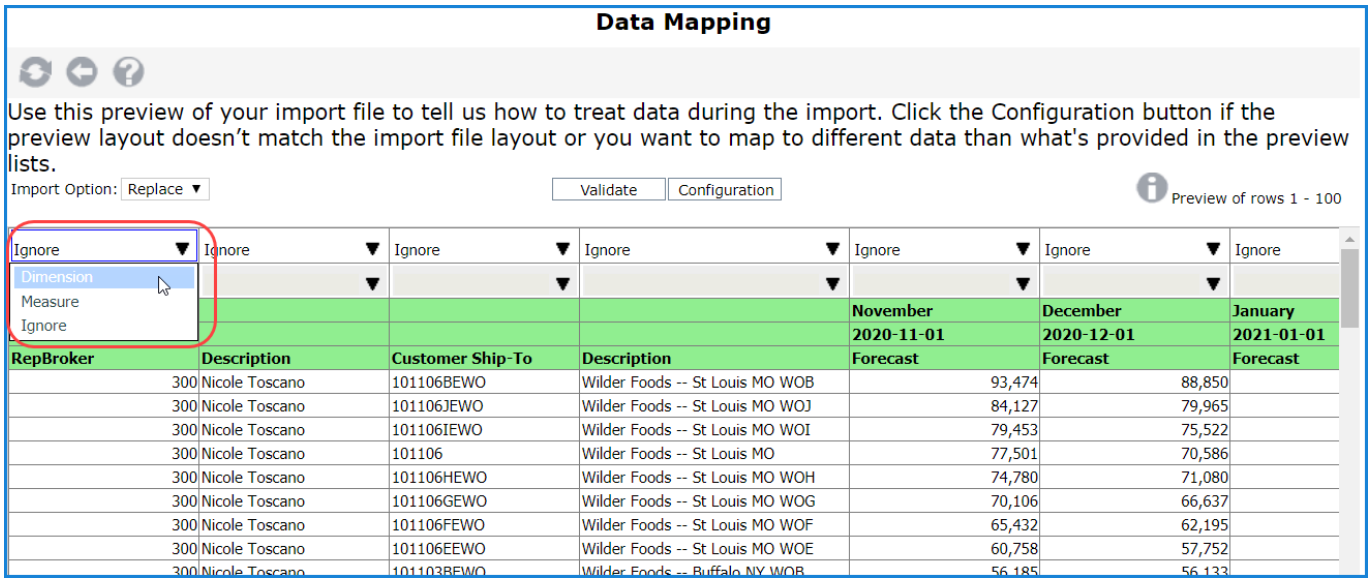
The import file is uploaded into a mapping window for you to preview and match up import file contents to the Stratum items where they will be imported.

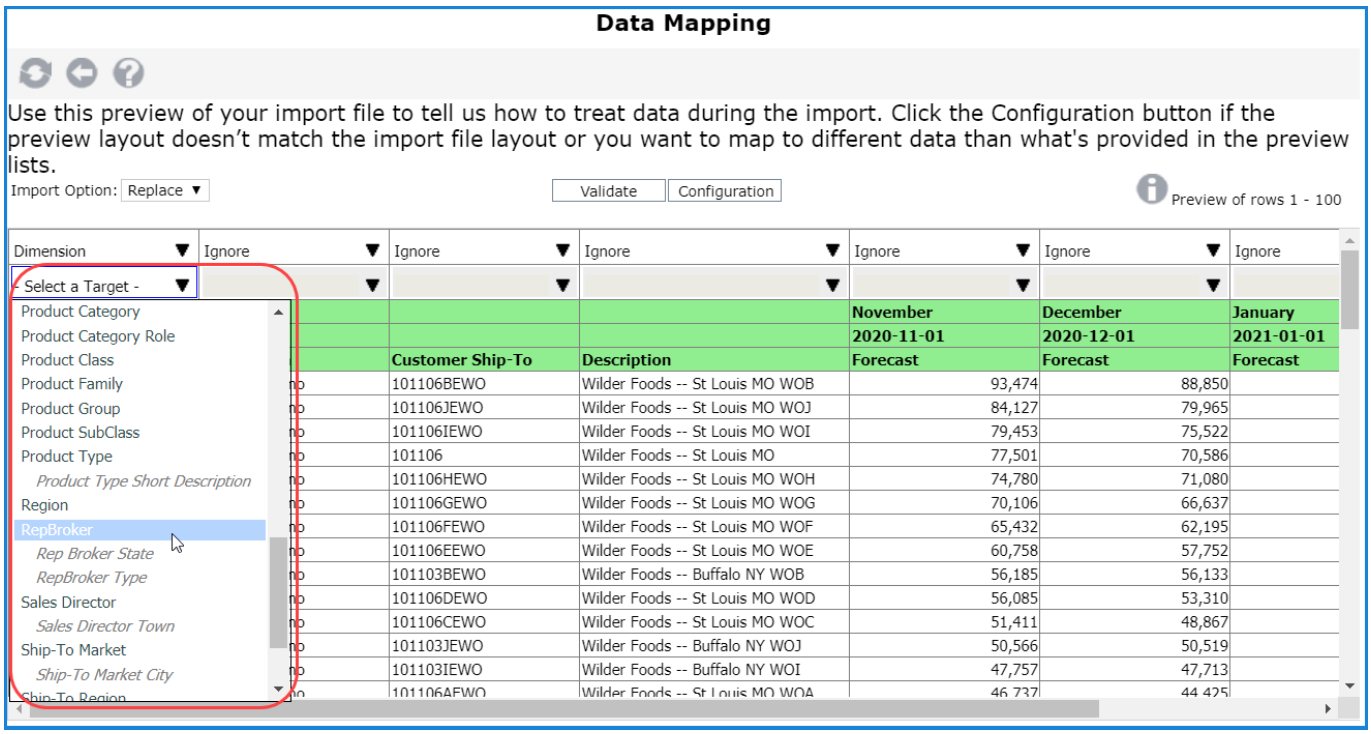
**Note:** As you do imports over time, Data Import will make some mapping selections for you automatically based on past patterns of what was imported and where it got imported.



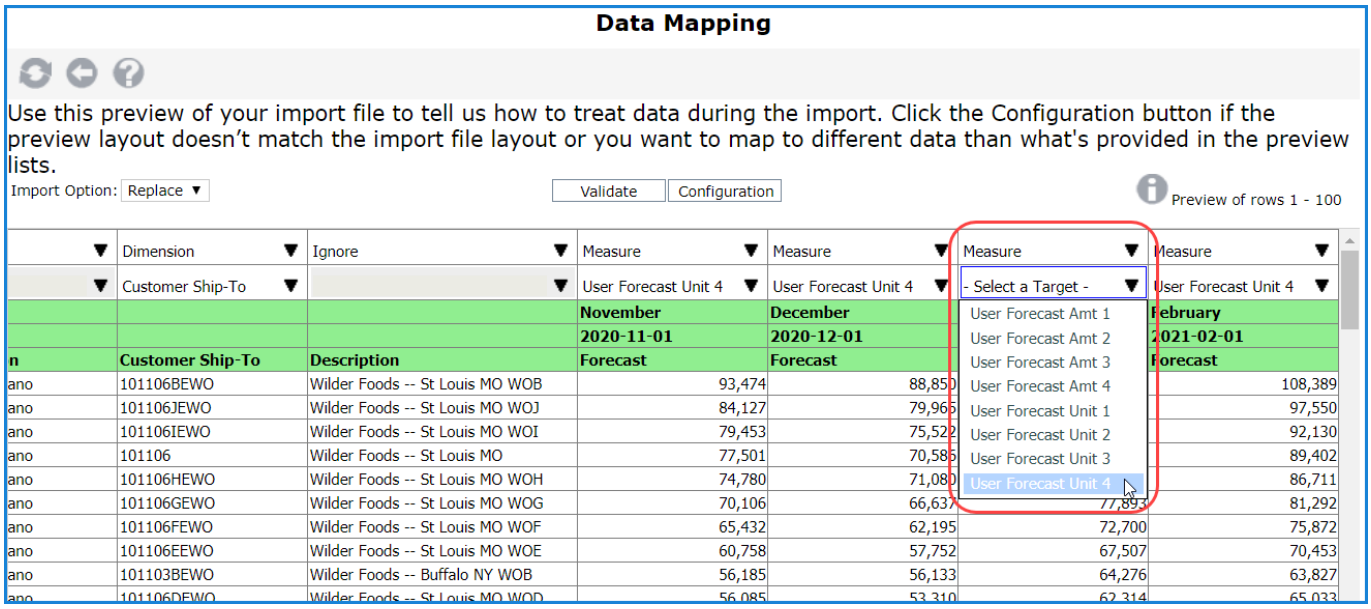

 

The drop-down lists above the header rows are used to identify columns as dimensions and measures. Columns that don't need to be imported should be set to Ignore. Here's a dimension column being mapped to RepBroker.



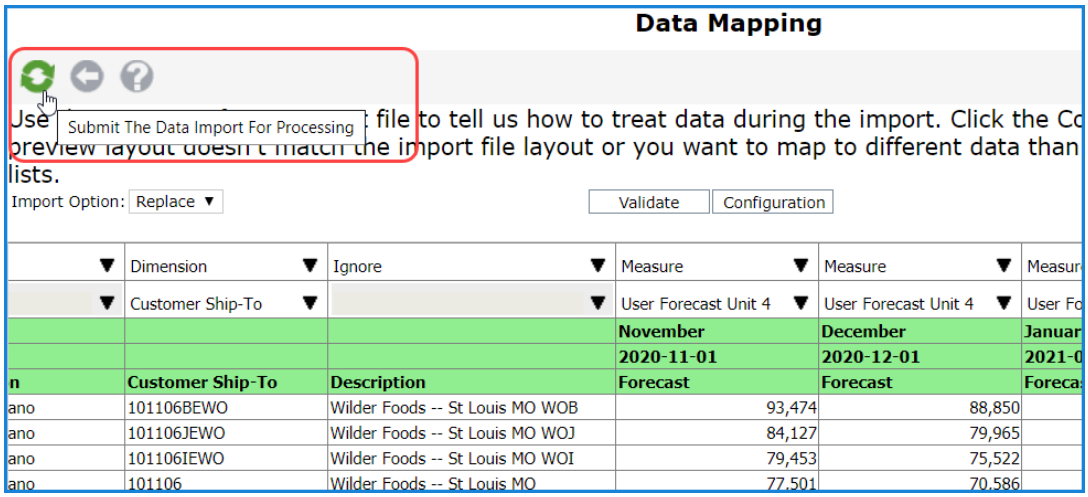



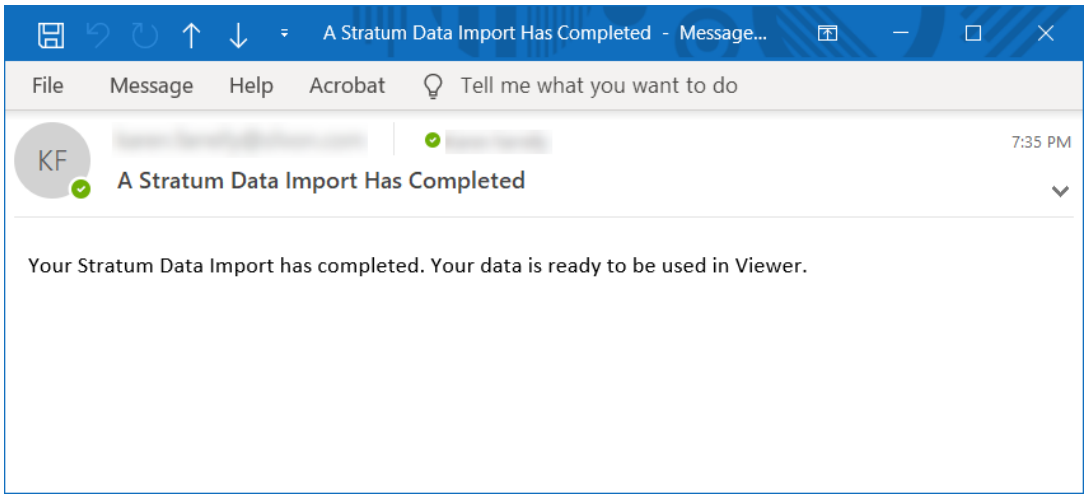
The columns containing dimension descriptions are set to Ignore. Finally, here are the measure values being mapped to User Forecast measures in the Target User Forecast category.



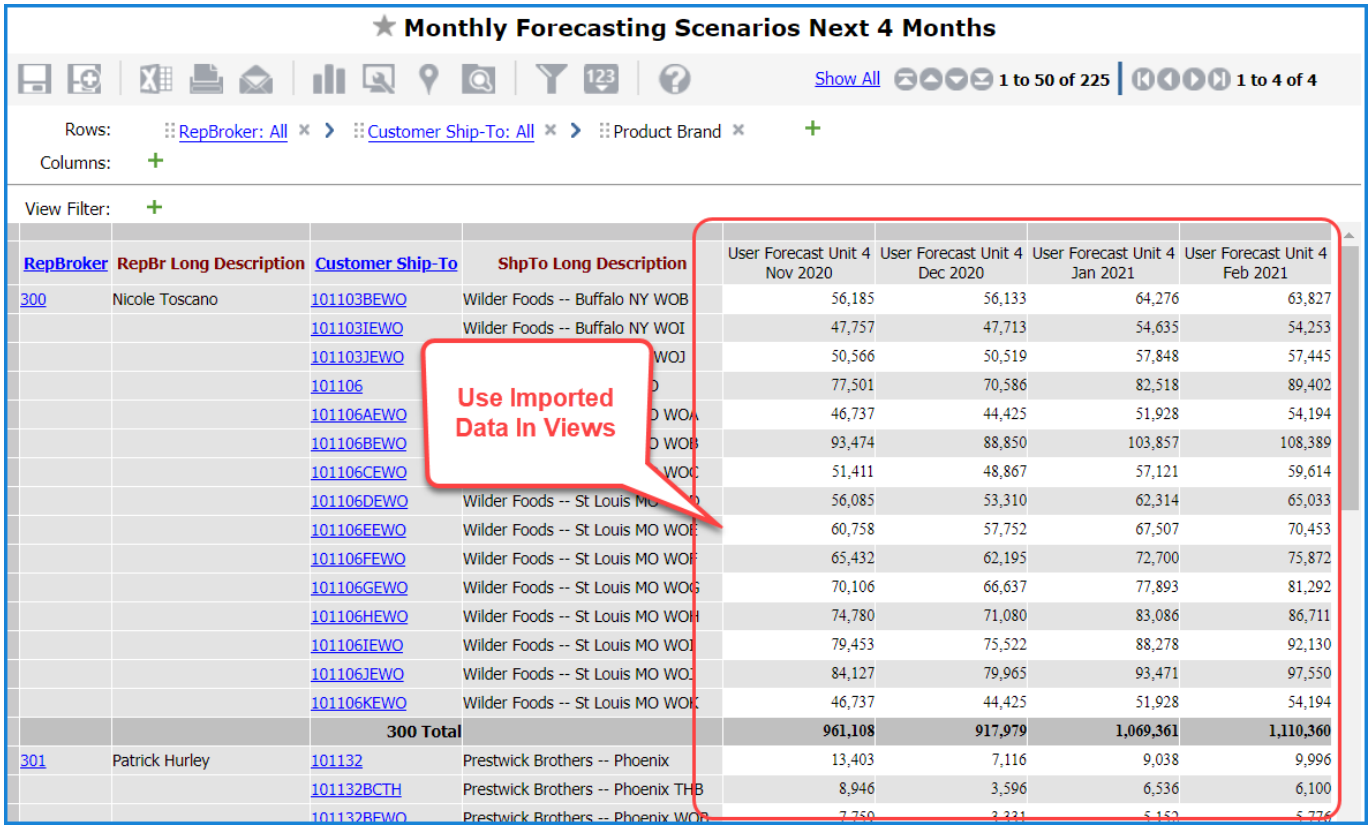

## 4. Use Data In Stratum

Some validations are done once you submit the import for processing. An email is sent to you once the import has finished processing. The data is ready to use in Stratum once the import has completed.



Here's the imported data in Viewer, ready for users to do some forecasting analysis for the next few months.



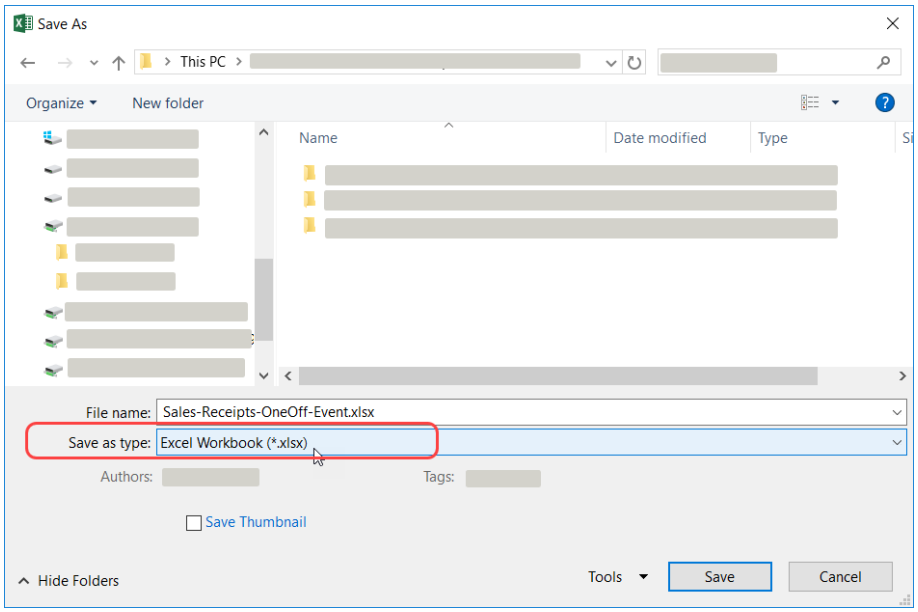

| RepBroker | RepBr Long Description | Customer Ship-To | ShpTo Long Description | User Forecast Unit 4 Nov 2020 | User Forecast Unit 4 Dec 2020 | User Forecast Unit 4 Jan 2021 | User Forecast Unit 4 Feb 2021 |
|---|---|---|---|---|---|---|---|
| 300 | Nicole Toscano | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 | 63,827 |
| | | 101103IEWO | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 | 54,253 |
| | | 101103JEWO | WOJ | 50,566 | 50,519 | 57,848 | 57,445 |
| | | 101106 | | 77,501 | 70,586 | 82,518 | 89,402 |
| | | 101106AEWO | O WOA | 46,737 | 44,425 | 51,928 | 54,194 |
| | | 101106BEWO | O WOB | 93,474 | 88,850 | 103,857 | 108,389 |
| | | 101106CEWO | WOC | 51,411 | 48,867 | 57,121 | 59,614 |
| | | 101106DEWO | Wilder Foods -- St Louis MO | 56,085 | 53,310 | 62,314 | 65,033 |
| | | 101106EEWO | Wilder Foods -- St Louis MO WOE | 60,758 | 57,752 | 67,507 | 70,453 |
| | | 101106FEWO | Wilder Foods -- St Louis MO WOF | 65,432 | 62,195 | 72,700 | 75,872 |
| | | 101106GEWO | Wilder Foods -- St Louis MO WOG | 70,106 | 66,637 | 77,893 | 81,292 |
| | | 101106HEWO | Wilder Foods -- St Louis MO WOH | 74,780 | 71,080 | 83,086 | 86,711 |
| | | 101106IEWO | Wilder Foods -- St Louis MO WOI | 79,453 | 75,522 | 88,278 | 92,130 |
| | | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 | 97,550 |
| | | 101106KEWO | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 | 54,194 |
| | | **300 Total** | | **961,108** | **917,979** | **1,069,361** | **1,110,360** |
| 301 | Patrick Hurley | 101132 | Prestwick Brothers -- Phoenix | 13,403 | 7,116 | 9,038 | 9,996 |
| | | 101132BCTH | Prestwick Brothers -- Phoenix THB | 8,946 | 3,596 | 6,536 | 6,100 |
| | | 101132BEWO | Prestwick Brothers -- Phoenix WOB | 7,759 | 3,331 | 5,152 | 5,776 |

## Tips For Setting Up Your Imports

The first step in prepping for a data import is to collect your data into an Excel file. Familiarize yourself with the following tips and revisit this topic for guidance while setting up import files for Data Imports.

### *Save File As "Excel Workbook"*

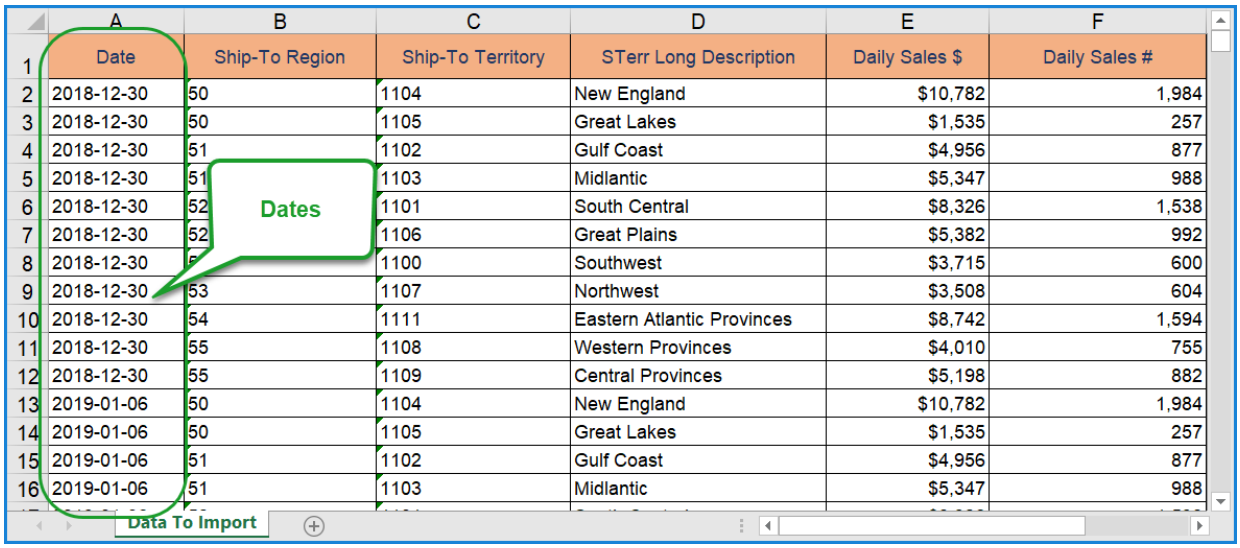
Save your file as an Excel Workbook file type and to a location that you can access while signed onto Stratum.Viewer. Avoid using the Strict Open XML Spreadsheet file type.



### *Include Dates, Dimension(s), and Measure(s)*

Your import must contain dates, dimensions, and measures – all of which tell Data Import where the data gets imported to in Stratum.

- **Dates** – Dates are transactional details about your import.

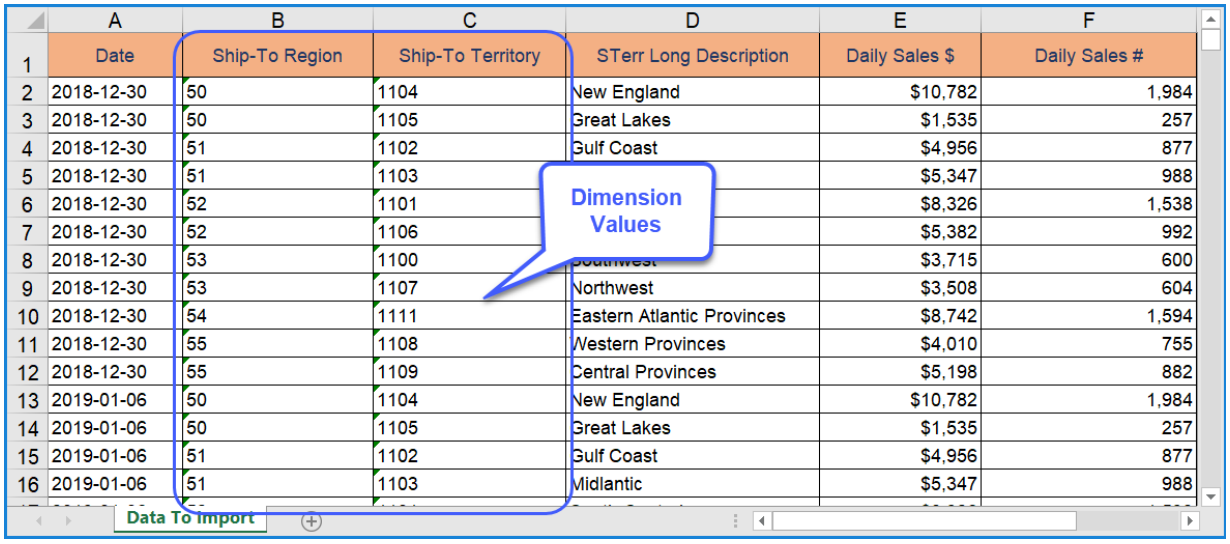



| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Date | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales $ | Daily Sales # |
| 2 | 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 3 | 2018-12-30 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 4 | 2018-12-30 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 5 | 2018-12-30 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 6 | 2018-12-30 | 52 | 1101 | South Central | $8,326 | 1,538 |
| 7 | 2018-12-30 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | Southwest | $3,715 | 600 |
| 9 | 2018-12-30 | 53 | 1107 | Northwest | $3,508 | 604 |
| 10 | 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 11 | 2018-12-30 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 12 | 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 13 | 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 14 | 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 15 | 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 16 | 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |

Dates must include the month, day, and calendar year. Also, they must all be in the same format. A mix and match of different formats isn't allowed in the same import file. Your dates can be in **one** of the following formats:

```
yyyy-mm-dd (2012-03-01)
m/d/yy (3/1/12)
mm/dd/yy (03/01/12)
m/d/yyyy (3/1/2012)
d-mmm-yy (1-Mar-12)
dd-mmm-yy (01-Mar-12)
mmmm d, yyyy (March 1, 2012)
d-mmm-yyyy (1-Mar-2012)
```

- **Dimensions** – Dimensions tell Data Import where measure data belongs when it is imported. Examples of dimensions are Product, Inventory, UPC, and Customer Ship-To. Dimension columns must contain the dimension values and not descriptive info (also known as PUF's or attribute relationships). If your import contains columns of descriptive info, you can tell Data Import to ignore the columns.

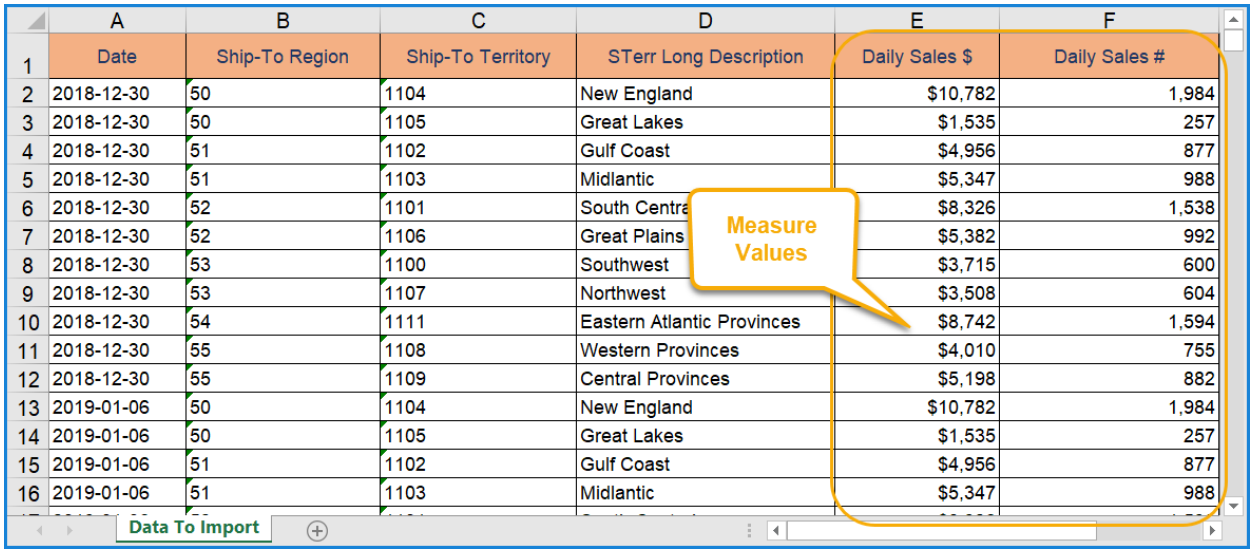



| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Date | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales $ | Daily Sales # |
| 2 | 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 3 | 2018-12-30 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 4 | 2018-12-30 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 5 | 2018-12-30 | 51 | 1103 | | $5,347 | 988 |
| 6 | 2018-12-30 | 52 | 1101 | | $8,326 | 1,538 |
| 7 | 2018-12-30 | 52 | 1106 | | $5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | | $3,715 | 600 |
| 9 | 2018-12-30 | 53 | 1107 | Northwest | $3,508 | 604 |
| 10 | 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 11 | 2018-12-30 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 12 | 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 13 | 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 14 | 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 15 | 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 16 | 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |

- **Measures** – The detail data you are importing are the measures. This could be sales event dollars and units, budget data, marketing plan figures, one-off event items, receipts details, vendor details collected from the web, or other types of statistical data about things like weather patterns, housing and building trends, and other types of economic indicators.

  Measure data must belong to the same category. For example, your file should only have data intended for a Forecast category or POS category but not both. Imports handle a single category at a time.




| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Date | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales $ | Daily Sales # |
| 2 | 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 3 | 2018-12-30 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 4 | 2018-12-30 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 5 | 2018-12-30 | 51 | 1103 | Midlantic | $5,347 | 988 |
| 6 | 2018-12-30 | 52 | 1101 | South Centra | $8,326 | 1,538 |
| 7 | 2018-12-30 | 52 | 1106 | Great Plains | $5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | Southwest | $3,715 | 600 |
| 9 | 2018-12-30 | 53 | 1107 | Northwest | $3,508 | 604 |
| 10 | 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 11 | 2018-12-30 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 12 | 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 13 | 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 14 | 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 15 | 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 16 | 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |

  Some tips about setting up the measure columns in your import file:

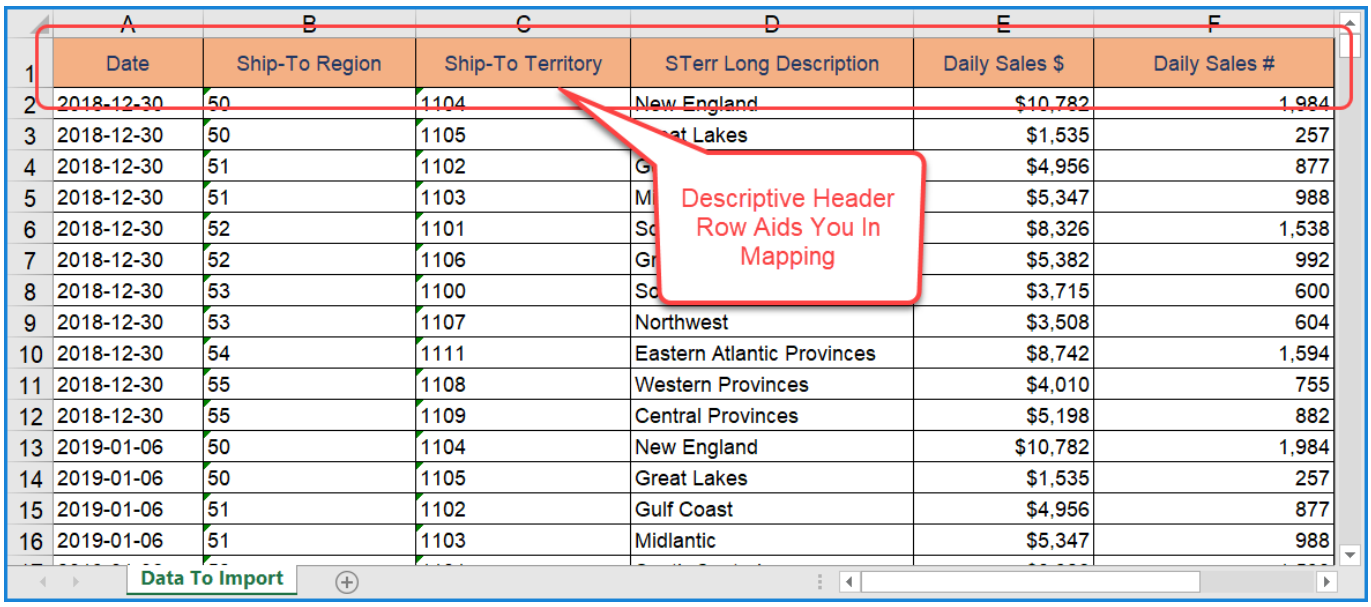
  - For imports where dates are in every row (known as a Transactions type import), make sure each set of measure values you plan to import is contained in its own dedicated column and not spread across multiple columns. For example, put all sales amount data in a single column and all sales units in a separate column.
  - For imports where dates are in a header row (known as a Time Series type import), make sure each combination of dates and measures get a dedicated column and represent a unique combination. For example, put all values for a 01-01-20 import of sales units into a single column under that date. Multiple columns with the same date can't be mapped to the same measure.
  - Format any negative numbers with either a negative sign in front of them or with parentheses marks around them such as -1,467 or (1,467). Don't use just a special color like red to format your negative numbers. At a minimum, use a negative sign or parentheses marks for them.

### *Use Descriptive Info In Header Row(s) To Help Map To Stratum Data*

Identifying information about the data contained in each column of your file can be included in the header row(s) of your import file. They help identity what's in each column – saving you time as you map columns or mark them to be ignored while setting up your import. Using header rows is optional for the Transactions import type (the type where dates are in every row). A minimum of one header row that contains dates is required for the Time Series import type (the type where dates are in a header row). A maximum of 99 headers rows can be included in either type of import.

The example shown in the next image uses one header row. You can use more than header row if needed. All header rows must be located at the top of your file, above the rows of import data.

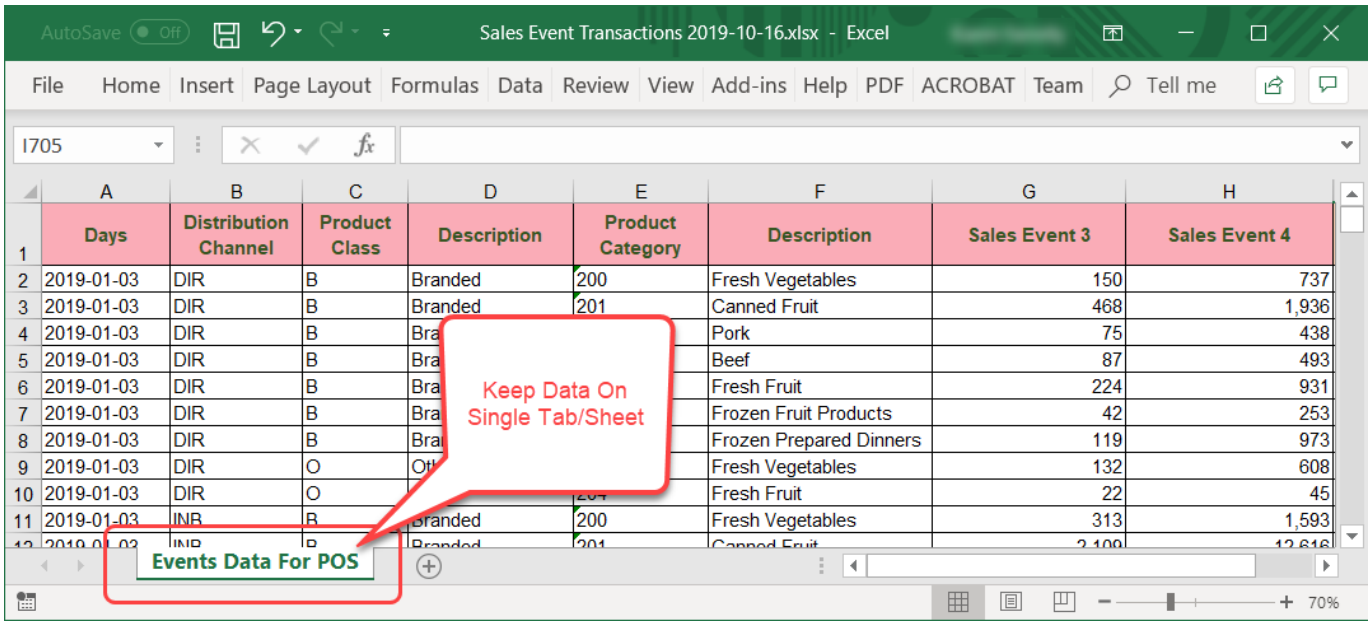
**Tip:** Using the word "Date" in the header of the column that contains the transaction date helps Data Import automatically map that column as a date column.




| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Date | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales $ | Daily Sales # |
| 2 | 2018-12-30 | 50 | 1104 | New England | $10,782 | 1,984 |
| 3 | 2018-12-30 | 50 | 1105 | [illegible] Lakes | $1,535 | 257 |
| 4 | 2018-12-30 | 51 | 1102 | G[illegible] | $4,956 | 877 |
| 5 | 2018-12-30 | 51 | 1103 | M[illegible] | $5,347 | 988 |
| 6 | 2018-12-30 | 52 | 1101 | S[illegible] | $8,326 | 1,538 |
| 7 | 2018-12-30 | 52 | 1106 | G[illegible] | $5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | S[illegible] | $3,715 | 600 |
| 9 | 2018-12-30 | 53 | 1107 | Northwest | $3,508 | 604 |
| 10 | 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $8,742 | 1,594 |
| 11 | 2018-12-30 | 55 | 1108 | Western Provinces | $4,010 | 755 |
| 12 | 2018-12-30 | 55 | 1109 | Central Provinces | $5,198 | 882 |
| 13 | 2019-01-06 | 50 | 1104 | New England | $10,782 | 1,984 |
| 14 | 2019-01-06 | 50 | 1105 | Great Lakes | $1,535 | 257 |
| 15 | 2019-01-06 | 51 | 1102 | Gulf Coast | $4,956 | 877 |
| 16 | 2019-01-06 | 51 | 1103 | Midlantic | $5,347 | 988 |

## *Keep Data On Single Worksheet or Tab*

The data for your import needs to be in the first worksheet or tab of your import file. Only the first worksheet or tab is considered by Data Import and all others are ignored.

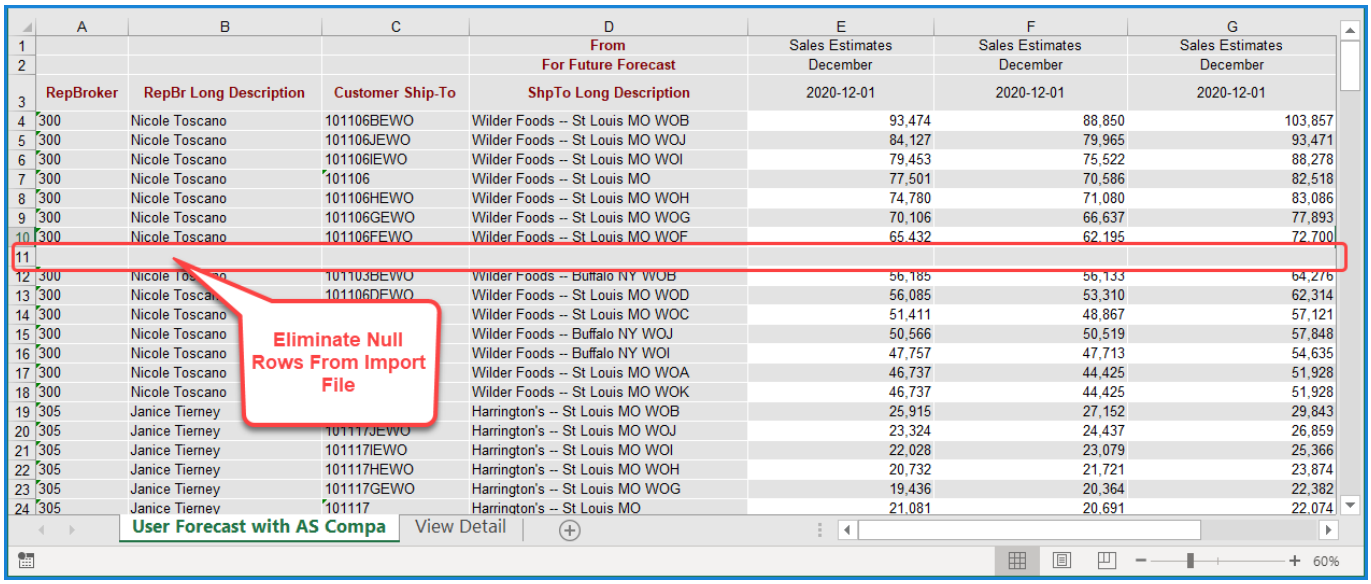



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Days | Distribution Channel | Product Class | Description | Product Category | Description | Sales Event 3 | Sales Event 4 |
| 2 | 2019-01-03 | DIR | B | Branded | 200 | Fresh Vegetables | 150 | 737 |
| 3 | 2019-01-03 | DIR | B | Branded | 201 | Canned Fruit | 468 | 1,936 |
| 4 | 2019-01-03 | DIR | B | Bra[illegible] | | Pork | 75 | 438 |
| 5 | 2019-01-03 | DIR | B | Bra[illegible] | | Beef | 87 | 493 |
| 6 | 2019-01-03 | DIR | B | Bra[illegible] | | Fresh Fruit | 224 | 931 |
| 7 | 2019-01-03 | DIR | B | Bra[illegible] | | Frozen Fruit Products | 42 | 253 |
| 8 | 2019-01-03 | DIR | B | Bra[illegible] | | Frozen Prepared Dinners | 119 | 973 |
| 9 | 2019-01-03 | DIR | O | Ot[illegible] | | Fresh Vegetables | 132 | 608 |
| 10 | 2019-01-03 | DIR | O | [illegible] | | Fresh Fruit | 22 | 45 |
| 11 | 2019-01-03 | INR | B | Branded | 200 | Fresh Vegetables | 313 | 1,593 |
| 12 | 2019-01-03 | INR | B | Branded | 201 | Canned Fruit | 2,109 | 12,616 |

## *Avoid Null Rows (They're Treated As The End of an Import)*

Make sure you don't have a null row interspersed with rows of data in your import file. A Null row is a row without any data (note that a cell with all blank spaces or with zeroes in it is not considered null). The first null row that Data Import encounters in an import file will be treated as the end of your file. Data Import stops looking for data to import once it finds a null row. In this example, you'd want to remove row 11. If you don't, the import will stop at that row and not consider any of the rows of data after that point.




| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | | | | From | Sales Estimates | Sales Estimates | Sales Estimates |
| 2 | | | | For Future Forecast | December | December | December |
| 3 | RepBroker | RepBr Long Description | Customer Ship-To | ShpTo Long Description | 2020-12-01 | 2020-12-01 | 2020-12-01 |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods -- St Louis MO WOB | 93,474 | 88,850 | 103,857 |
| 5 | 300 | Nicole Toscano | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 |
| 6 | 300 | Nicole Toscano | 101106IEWO | Wilder Foods -- St Louis MO WOI | 79,453 | 75,522 | 88,278 |
| 7 | 300 | Nicole Toscano | 101106 | Wilder Foods -- St Louis MO | 77,501 | 70,586 | 82,518 |
| 8 | 300 | Nicole Toscano | 101106HEWO | Wilder Foods -- St Louis MO WOH | 74,780 | 71,080 | 83,086 |
| 9 | 300 | Nicole Toscano | 101106GEWO | Wilder Foods -- St Louis MO WOG | 70,106 | 66,637 | 77,893 |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods -- St Louis MO WOF | 65,432 | 62,195 | 72,700 |
| 11 | | | | | | | |
| 12 | 300 | Nicole Tos | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 |
| 13 | 300 | Nicole Toscan | 101106DEWO | Wilder Foods -- St Louis MO WOD | 56,085 | 53,310 | 62,314 |
| 14 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOC | 51,411 | 48,867 | 57,121 |
| 15 | 300 | Nicole Toscano | | Wilder Foods -- Buffalo NY WOJ | 50,566 | 50,519 | 57,848 |
| 16 | 300 | Nicole Toscano | | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 |
| 17 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOA | 46,737 | 44,425 | 51,928 |
| 18 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 |
| 19 | 305 | Janice Tierney | | Harrington's -- St Louis MO WOB | 25,915 | 27,152 | 29,843 |
| 20 | 305 | Janice Tierney | 101117JEWO | Harrington's -- St Louis MO WOJ | 23,324 | 24,437 | 26,859 |
| 21 | 305 | Janice Tierney | 101117IEWO | Harrington's -- St Louis MO WOI | 22,028 | 23,079 | 25,366 |
| 22 | 305 | Janice Tierney | 101117HEWO | Harrington's -- St Louis MO WOH | 20,732 | 21,721 | 23,874 |
| 23 | 305 | Janice Tierney | 101117GEWO | Harrington's -- St Louis MO WOG | 19,436 | 20,364 | 22,382 |
| 24 | 305 | Janice Tierney | 101117 | Harrington's -- St Louis MO | 21,081 | 20,691 | 22,074 |

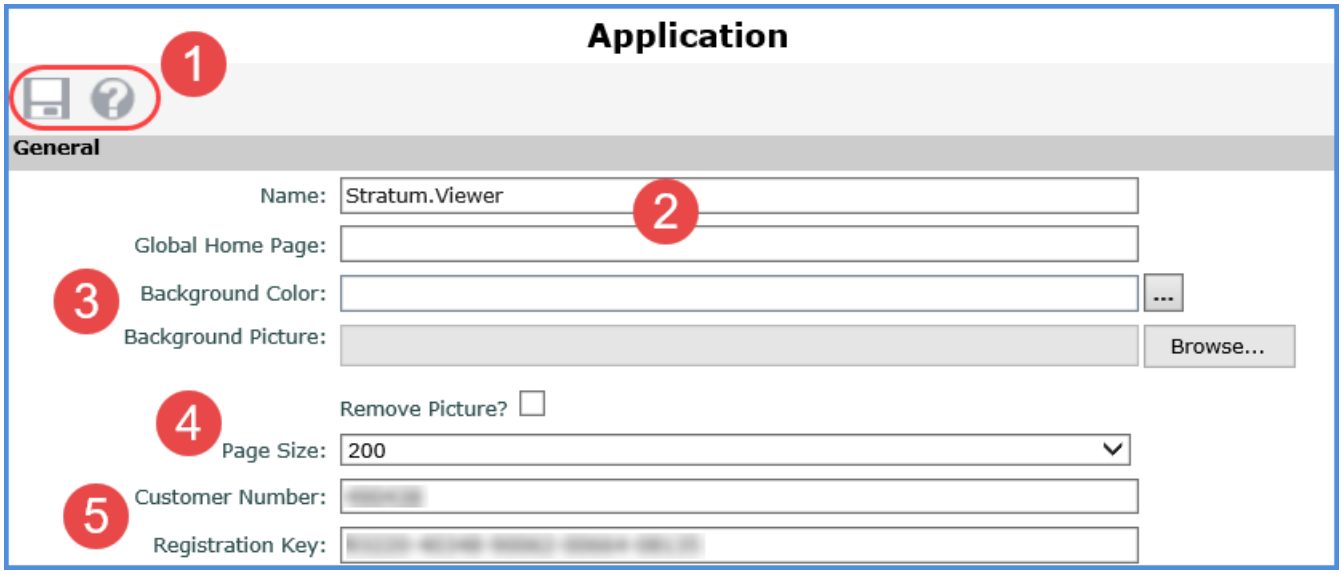
## *Exclude Unnecessary Extras*

Certain types of information should be excluded either because they don't make sense for an import, aren't necessary for an import, could disrupt the upload process*, or could throw off the integrity of the import such as bring in unwanted data.

- **Exclude grand totals and subtotals.** Only include detail data in import files. Importing subtotal and total data would duplicate other data in the import.
- **Delete any hidden rows from the Excel file**, otherwise they will show up in the data import preview and be included in the data that gets imported. If you don't want data from hidden rows, delete the rows from the Excel file before you import it.
- **Delete hidden columns from the Excel file**, otherwise they will show up in the data import preview. If you don't want data from hidden columns included in your import, delete the columns from the Excel file before you import it OR mark the columns as Ignore when mapping the data.
- In cases where you use an exported Stratum.Viewer view as the starting point when creating an import file, it is recommended that you disable or **exclude the following Viewer features before exporting the view.**
    - "All Others" rows or columns related to filtering.
    - Conditional format icons or formatting.
    - Charts.
    - Hyperlinks.
    - Calculated measure items that return images.
    - Pop-up labels on measure items.
    - Drilldown views linked up to rows, columns, or measure items.
- Also consider excluding specialty Excel items like the items listed below.
    - Images.
    - Charts.
    - Cell borders.
    - Comments or notes.
    - Excel features such as Pivot tables and text boxes.

## Application Window

### *General Section*

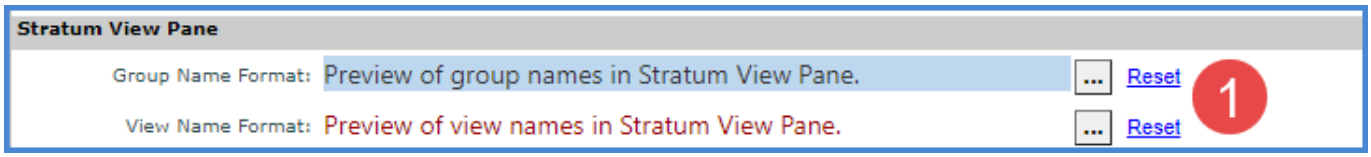



| | |
|---|---|
| 1 | **Toolbar** -<br>• **Save** - Click to save changes to application settings.<br>• **Help** - Click to open help that is specific to working with application settings. |
| 2 | **Name -** Use this field to customize the name that displays for the application in the browser title bar and tab.<br>**Global Home Page** - Use this field to define a custom, global home page for Stratum.Viewer. The home page can open to a web site, document, directory, or other supplementary information that would be meaningful for users.<br>If you leave this field blank, the application home page defaults to a Stratum home page that has links to Stratum.Viewer videos and other resources.<br>If needed, administrators can define different home pages for particular users or user groups through settings in the User Profile or User Profile Group windows. |
| 3 | **Background Color and Background Picture** - Use these settings to control the background of the home page, Stratum View Pane, and view grid area. Use the respective Browse buttons to browse to a color selection window or to browse to an image file. If you choose an image file, it will repeat as needed to fill up the size of the background area.<br>To remove a background picture, select the Remove Picture? checkbox. |
| 4 | **Page Size** - This setting controls how many objects display per page in windows where lists of objects display. For example, the setting controls page size in the View list, User List, Role, Select Members, Select User, and Select User List Filter windows. There are many page sizes to choose from, as low as 25 or as high as 5000 objects per page. |

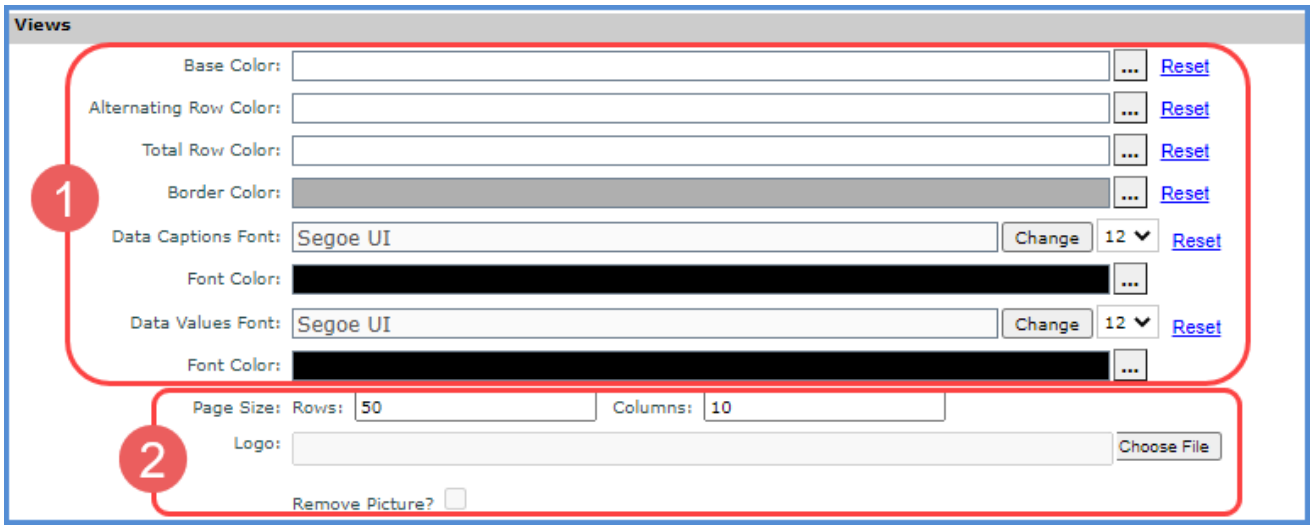
| | |
|---|---|
| 5 | **Customer Number** - This is a unique identification number for your Stratum.Viewer implementation. Contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com if you do not have a valid customer number.<br><br>**Registration Key** – A valid registration key is required for licensed copies of Stratum. If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com. |

### *Stratum View Pane Section*




| | |
|---|---|
| 1 | **Group Name Format** - This property controls the format of group names in the Stratum View Pane. Click the Browse button ... to open a window where you can customize group background and font color, the font and size, font style (Regular, Italic, Bold, Bold Italic), and font effect (such as underline). This property shows a preview of what your group format selections will look like once applied. Click the Reset link to restore to the default look.<br><br>**View Name Format** – This property controls the format of view names in the Stratum View Pane. Click the Browse button ... to open a window where you can customize background and font color, the font and size, font style (Regular, Italic, Bold, Bold Italic), and font effect (such as underline). This property shows a preview of what your view name format selections will look like once applied. Click the Reset link to restore to the default look. |

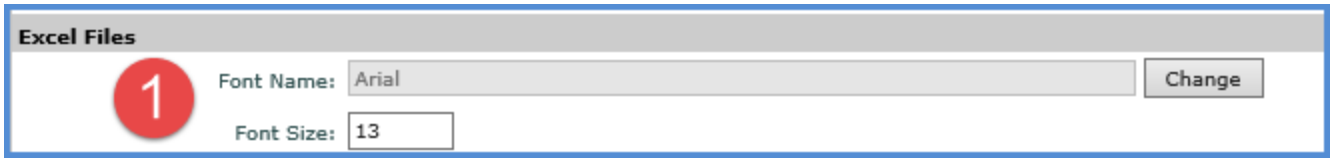
### *Views Section*




| | |
|---|---|
| 1 | **Properties That Control Default Look Of All View Grids** – The properties described below control the default look assigned to the grid for all views.* Properties available to control the look of the grid are:<br><br>• **Base Color** - The fill color for all cells in rows and columns.<br>• **Alternating Row Color** - A secondary fill color used for every other row in grid.<br>• **Total Row Color** - The fill color for subtotal and grand total rows and columns.<br>• **Border Color** – The color for borders in the grid. You can give the grid an appearance of having no visible borders by setting this Border color to be the same as the Base color for the |

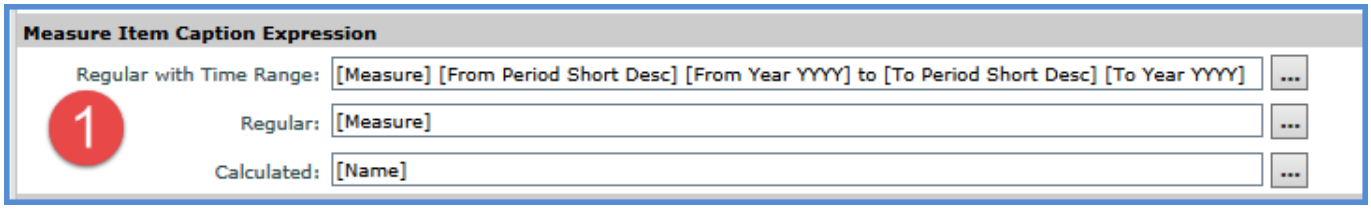
| | |
|---|---|
| | grid. That will make the borders blend into the grid background. For example, make borders white if the Base color is white.<br>• **Data Captions Font** - The font, font size, and font color used for captions of measure items, levels, and attribute relationships in the grid.<br>• **Data Values Font** - The font, font size, and font color used for values of measures in the grid.<br><br>If you want to revert a property back to its default, click Reset for the property. Resetting all properties reverts to a default look of white for the base, alternating, and total row fill colors; light gray borders; font settings of Segoe UI/Black/12pt for all captions; and font settings of Segoe UI/Black/12pt for all measure item values in the grid.<br><br>***Note:** All of these properties can be overridden by users in their individual views. |
| 2 | **Page Size, Rows and Columns** - Controls how many rows and columns display per page for views that use paging. Enter a numeric value in the Rows and Columns fields. Security administrators can define different view page sizes for particular users through User Profile settings. Individual users can override administrator settings and define their own, custom view page sizes for all views through an override setting in their User Options or for individual views through a view's Display Options.<br><br>**Logo** – Optionally specify an image to display as a logo in views. The image will display near the view name in the grid when users run views. Click the Choose File button to navigate to the image, then click Open in the Choose File window to upload a copy of the image. The image file will be copied to the Viewer application folder. To remove a logo, select the Remove Picture? checkbox. |

### *Excel Files Section*




| | |
|---|---|
| 1 | **Font Name and Size** – Click the Change button and use the Select Font window to control the font type for data for Excel spreadsheets generated by Stratum.Viewer's Export to Excel and Stratum Broadcast Manager functionality. To control the font size of that data, enter the numeric size in the Font Size field. |

### *Measure Item Caption Expression Section*



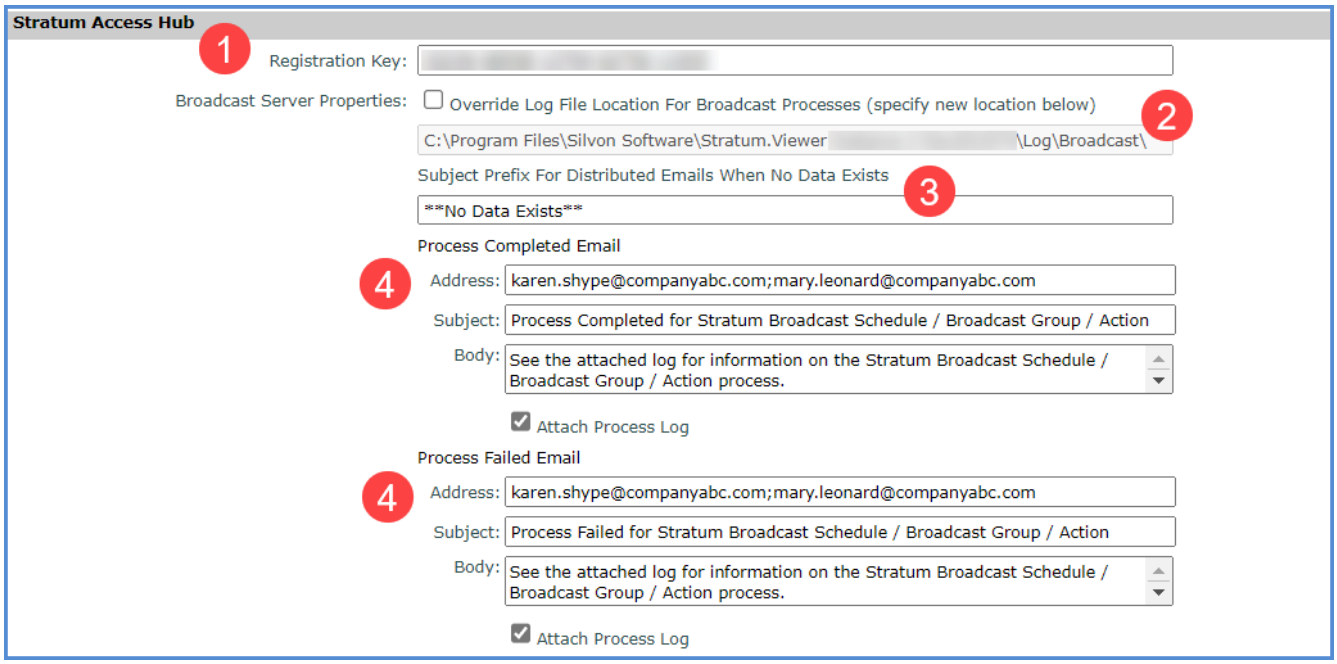

| | |
|---|---|
| 1 | Settings in the Measure Item Caption Expression section control the captions that will be assigned to new measure items created in views by default. Users can customize captions within each view if they prefer a caption other than the application default. If you change the application default, the captions of existing measure items will remain as is. Only new measures items added to views after your change will be assigned the new default. You can set up unique caption defaults for each type of measure item.<br><br>The fields in this section are read only, but you can click the Browse button ... next to each field to access the Caption Expression window and customize the caption default. See also Edit Application Defaults for Measure Item Captions. |

| | |
|---|---|
| | • **Regular with Time Range** - The expression that will determine caption defaults of regular measure items with time ranges. The default will be the following unless you make adjustments to this application setting.<br><br>[Measure][From Period Short Desc] [From Year YYYY] to [To Period Short Desc] [To Year YYYY]<br><br>• **Regular** - The expression that will determine caption defaults of regular measure items without time. The default will be the following unless you make adjustments to this application setting.<br><br>[Measure]<br><br>• **Calculated** - The expression that will determine caption defaults of calculated measure items. The default will be the following unless you make adjustments to this application setting.<br><br>[Name] |

### *Stratum.Viewer Server Section*


| | |
|---|---|
| 1 | **SMTP Server** - This setting controls how Stratum.Viewer delivers the emails that it generates. The property defaults to a "localhost" value, in which case Stratum.Viewer emails will be delivered using the SMTP configurations for the server where Stratum.Viewer resides.<br><br>If you plan to use an SMTP server other than the default for delivering Stratum.Viewer generated emails, enter that server name in the SMTP Server field. Enter the server name in a format that will be recognized by your network. For example, the server name or IP address or in the format of server name.network name.com.<br><br>**Note:** If you are not sure which default SMTP server is used for the Stratum.Viewer server, access Microsoft Internet Information Services Manager on the server and look at the Default SMTP Virtual Server settings. |

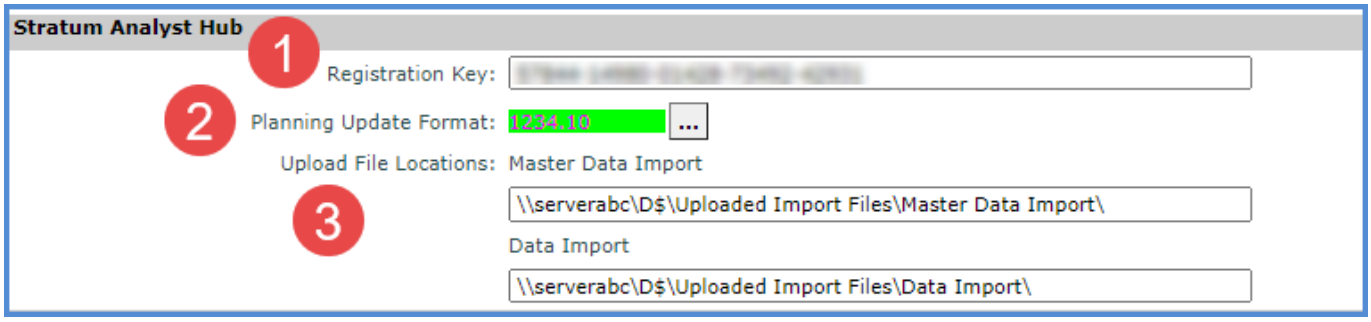
### *Stratum Access Hub Section*




| | |
|---|---|
| 1 | **Registration Key** – A valid key is required to activate licensed copies of the Stratum Access Hub which includes the Broadcast Manager (controls broadcast schedules, broadcast groups, and actions processing) plus Excel and Stratum Power BI Connectors. If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com. If your company is not using this functionality, leave this key field blank. |
| 2 | **Override Log File Location For Broadcast Processes** – This Broadcast Server property can be used to customize where log files from Broadcast Server processing are stored. The logs are from the processing of broadcast schedules, broadcast groups, and actions. By default, logs are stored in the '\Logs\Broadcast Server' sub-folder in the directory where your Stratum.Viewer implementation is installed. If you want to change the log file location, select the Override Log File Location checkbox and enter the location in the related field. The location you specify must exist already and be one to which your company's Action Processing Account has access rights. |

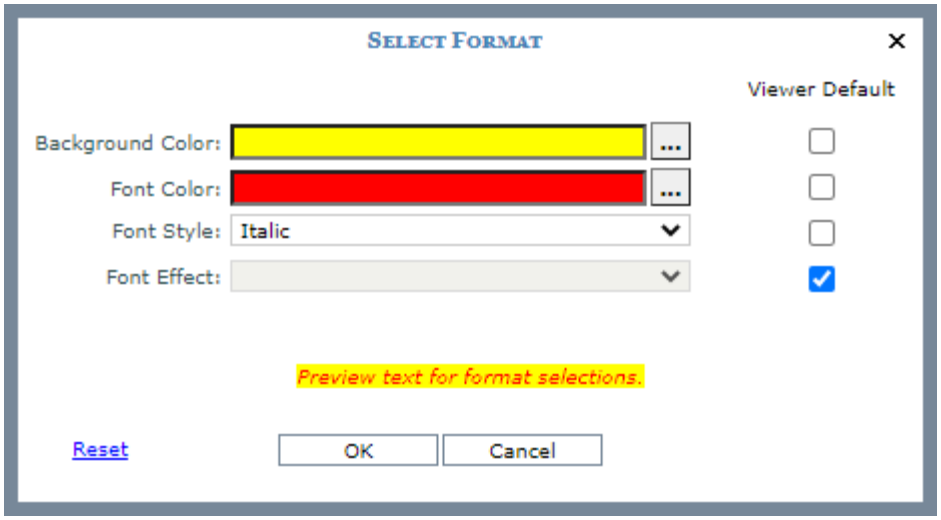
| | |
|---|---|
| 3 | **Subject Prefix For Distributed Emails When No Data Exists** – This text controls the default subject prefix for emails of actions that would generate blank results – an action where no data is available to generate a report. Those cases occur when an Email action would result in no data to send to the designated user or a File action would result in no data in the resulting shared file. For example, if there are no rows and columns returned for a view that tracks excessive returns because no rows satisfy filter criteria of YTD Return Amount greater than $40,000.<br><br>The prefix is only used when an action's "Send Email when no Data Exists" property has been set to Yes and when no data exists. The prefix defined here will be used in the action email subject line before the rest of the Subject field text unless the user customized the prefix text for their specific action.<br><br>**Note:** If a user sets an action's "Send Email when no Data Exists" property to No and a no data case occurs, then no email will be generated by the action. |
| 4 | **Process Completed Email / Process Failed Email** – The properties in these two sections are used to automatically send emails to the designated recipients that tell them about processing of Broadcast Schedules, Broadcast Groups, and Actions. Process Completed emails indicate a process completed. Process Failed emails indicate a process failed. The emails give greater visibility into what's happening with the Stratum Access Hub's Broadcast Manager.<br><br>For each type of email, specify the email addresses, subject, and body text for the messages. Typical recipients will be Broadcast Manager administrators or other interest parties who need to know what's happening with the Broadcast Manager. Use a semicolon or comma to separate email addresses if you specify more than one recipient.<br><br>Processing logs can be attached to these emails to provide more detailed information about a process. |

### *Stratum Analyst Hub Section*




| | |
|---|---|
| 1 | **Registration Key** – A valid key is required to activate licensed instances of the Stratum Analyst Hub, which provides Planning and Data Import functionality. If you receive a message about an invalid key, contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com. If your company is not using this functionality, leave this key field blank. |
| 2 | The Planning Update Format property controls the cell and text formatting that will be applied in a measure item's cell when planning updates are made in a view. Click the Browse button ... to access the Select Format window. In that window, you can edit the cell background color and the font color, style, and effect. In the example below, cells will be assigned a yellow background and text will appear in red, italic font when planning updates are made.<br><br>These administrative settings control the format of planning updates for all users. Security administrators can define different planning update formats for particular users through User Profile settings. Individual users can override administrator settings and define their own, custom planning format through an override setting in their User Options. |

**Note:** The Planning Update formats only apply to pending planning changes. For example, once you submit your planning changes and the grid refreshes, changed values will display in the same standard format as other values in the grid.



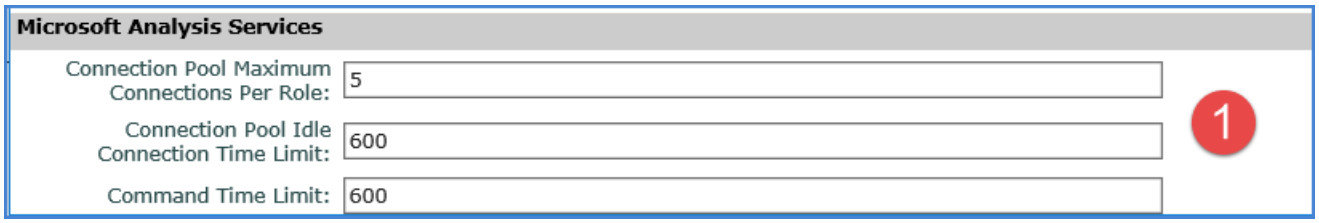

3

**Upload File Locations** – This property is applicable when Master Data Import or Data Import functionality are used with your implementation. These locations are used by Data Import and Master Data Import.

- The Master Data Import location is used when importing values into User Controlled Attributes.
- The Data Import location is used when importing values into User Controlled Measures.
- 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\

The location must be one that exists already and one for which your implementation's Viewer Impersonation account has access rights (read and write access). See account access requirements defined in the Master Data Import and Data Import sections of help.

## *Microsoft Analysis Services Sections*



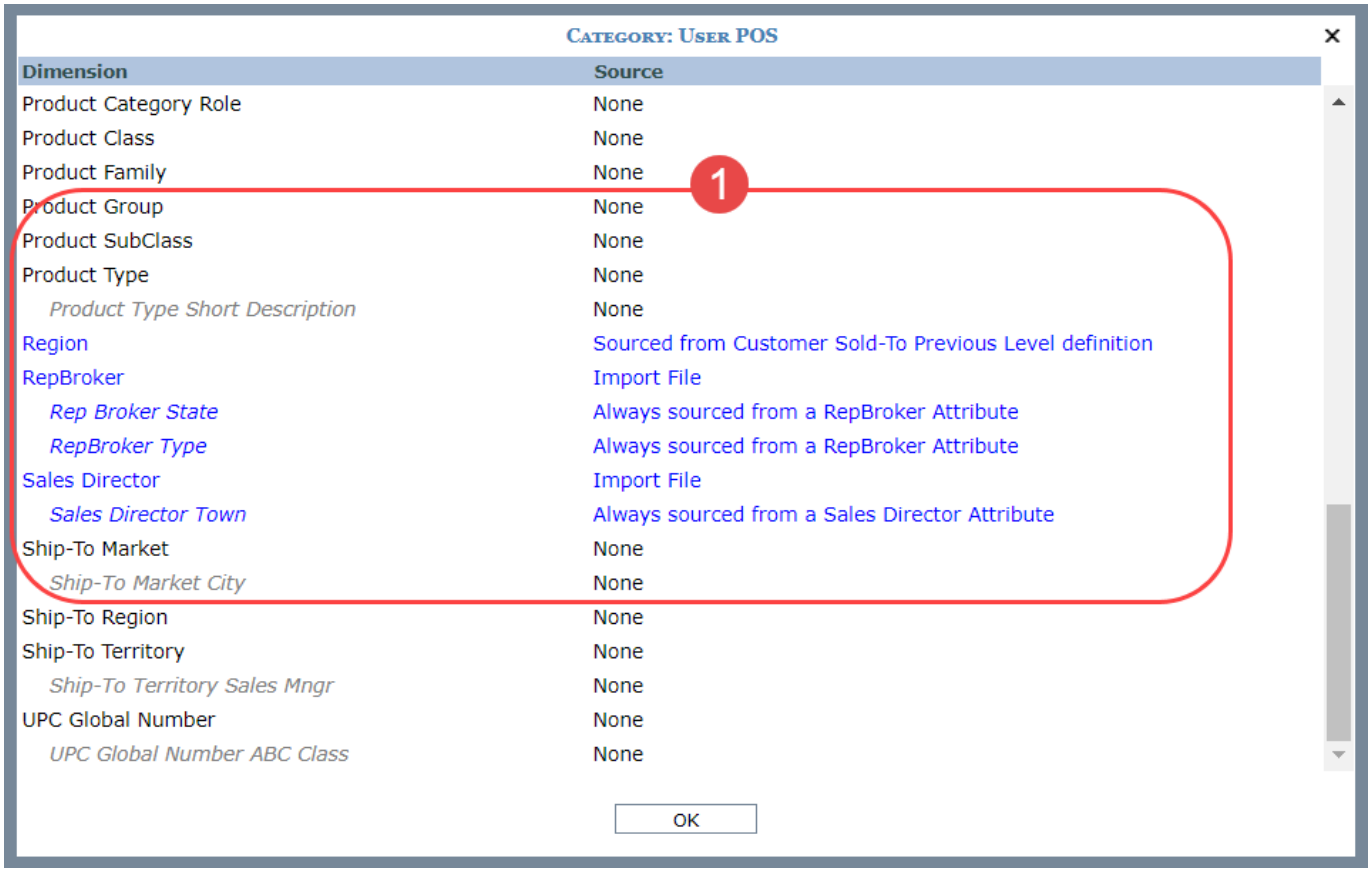

1

**Microsoft Analysis Services -**

- **Connection Pool Settings** - Connection pools for Stratum.Viewer are managed via Stratum.Viewer rather than via Microsoft Analysis Services. To support this connection pooling, two parameters are available. The settings determine how many connection pool connections can exist for each user's role and how long idle connections can be left open before Stratum.Viewer closes them.
  - **Connection Pool Maximum Connections Per Role** - The value for this parameter determines how many open connections will be maintained in the connection pool for each user's role. The default and recommended value is 5. That means that a

| | |
|---|---|
| | maximum of five open data connections will be maintained in the pool for each user's role. In most cases, this setting allows for an optimal balance between the performance time of connecting to retrieve data from the Stratum.Connector Analysis Services database and the resources required on the Stratum.Viewer server to maintain the connection pool.<br>• **Connection Pool Idle Connection Time Limit** - The value for this parameter determines how many seconds a connection can remain idle before its times out and is removed from the connection pool. The default and recommended value is 600. In most cases, this setting allows for an optimal balance between the performance time of connecting to retrieve data from the Stratum.Connector Analysis Services database and the resources required on the Stratum.Viewer server to maintain the connection pool.<br>• **Command Time Limit** – This setting should **not** be changed unless you are directed to by Silvon Support. The setting impacts how long parts of processes handled by Stratum.Connector are given to complete those parts before the process times out. |

## Category Information Window



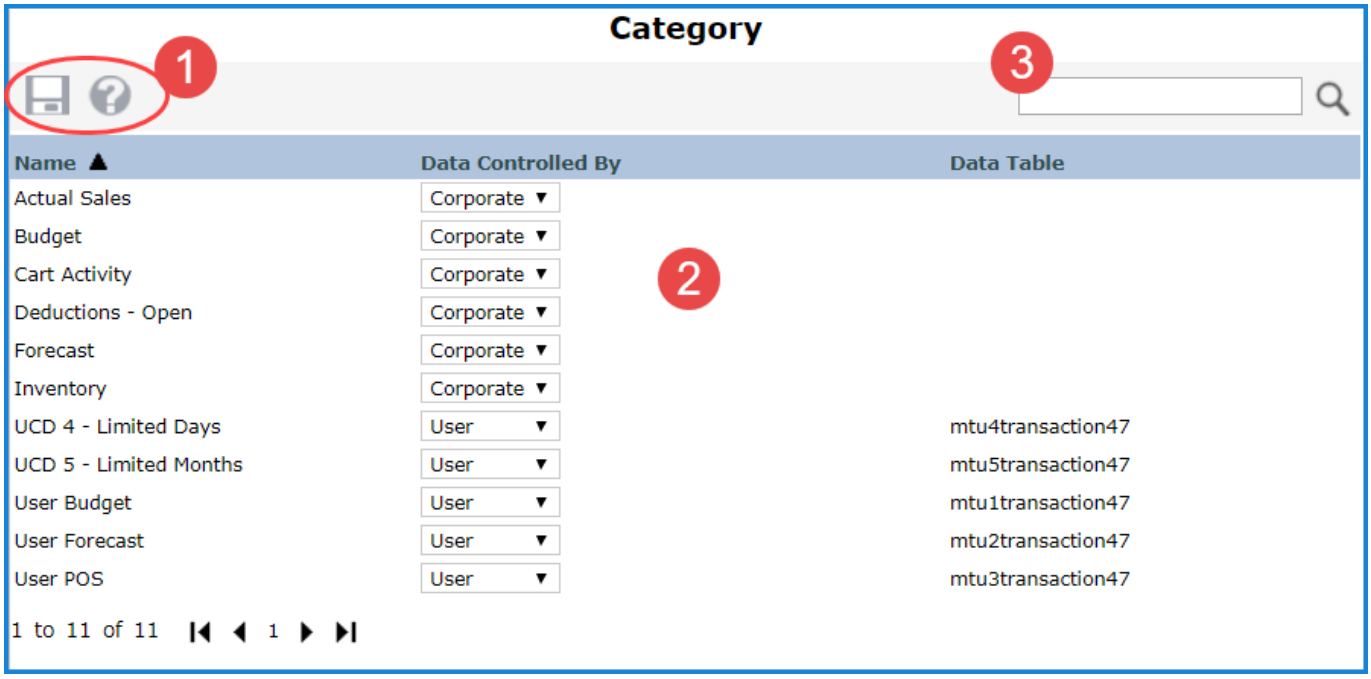

| | |
|---|---|
| 1 | **Color Coding –** The color of text in this window offers a clue to which dimensions will be impacted by an import. Blue text indicates the dimension will get populated based on the import data. Black and grey text indicates the dimension is not impacted by the import data and will be populated with only the dimension's default value.<br><br>**Dimension** – This window lists all dimensions that belong to the category you selected as the Target for your import. Any virtual dimensions* that belong to a dimension, if there are any, display indented and in italicized text under the parent dimension from which they are associated.<br><br>***Note:** Virtual dimensions are created from the attribute relationships of a dimension.<br><br>**Source** – Details listed here tell you what dimensions have been directly mapped to the import data and what other additional dimensions will be impacted by the import.<br>• **Import File** – means the data for this dimension will come directly from the import file. This dimension has been directly mapped in the Data Mapping window for the import.<br>• **"Always sourced from a ... Attribute"** – means that the data for this dimension will be derived from its associated parent dimension. These are virtual dimensions created from an attribute of their parent dimensions.<br>• **"Sourced from … Previous Level Definition"** – means that the data for this dimension will be derived from another dimension using Stratum previous level relationships.<br>• **None** – means the dimension wasn't included in the import file or values for it couldn't be sourced from previous level definitions or an attribute of a parent dimension. The only place |

import data will go to for these dimensions is their default value (typically represented by the "?" character in views).

In the following example, the import was directly mapped to the Customer Sold-To, RepBroker and Sales Director dimensions. Therefore, their source is Import File. All virtual dimensions under those dimensions (RepBroker State, RepBroker Type,and Sales Director Town) will have their data sourced from their associated parent dimensions. Four other dimensions will have their data sourced from previous level definitions– they are Customer Priority, Customer SIC Code, Customer Type, and Region.

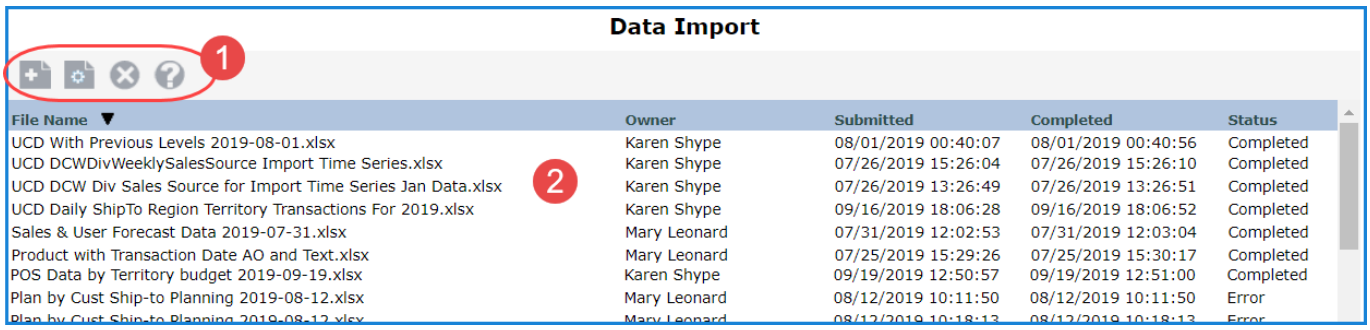
| Dimension | Source |
|---|---|
| Customer Priority | Sourced from Customer Sold-To Previous Level definition |
| Customer Ship-To | None |
| *Customer Ship-To Country* | None |
| *Customer Ship-To Postal Code* | None |
| *Customer Ship-To Sales Rep* | None |
| *Ship-To State* | None |
| Customer SIC Code | Sourced from Customer Sold-To Previous Level definition |
| Customer Sold-To | Import File |
| Customer Type | Sourced from Customer Sold-To Previous Level definition |
| Distribution Center Warehouse | None |
| *Distribution Center Warehouse State* | None |
| *Product Type Short Description* | None |
| Region | Sourced from Customer Sold-To Previous Level definition |
| RepBroker | Import File |
| *Rep Broker State* | Always sourced from a RepBroker Attribute |
| *RepBroker Type* | Always sourced from a RepBroker Attribute |
| Sales Director | Import File |
| *Sales Director Town* | Always sourced from a Sales Director Attribute |
| Ship-To Market | None |
| *Ship-To Market City* | None |
| Ship-To Region | None |
| Ship-To Territory | None |
| *Ship-To Territory Sales Mngr* | None |
| UPC Global Number | None |
| *UPC Global Number ABC Class* | None |

## Category Window



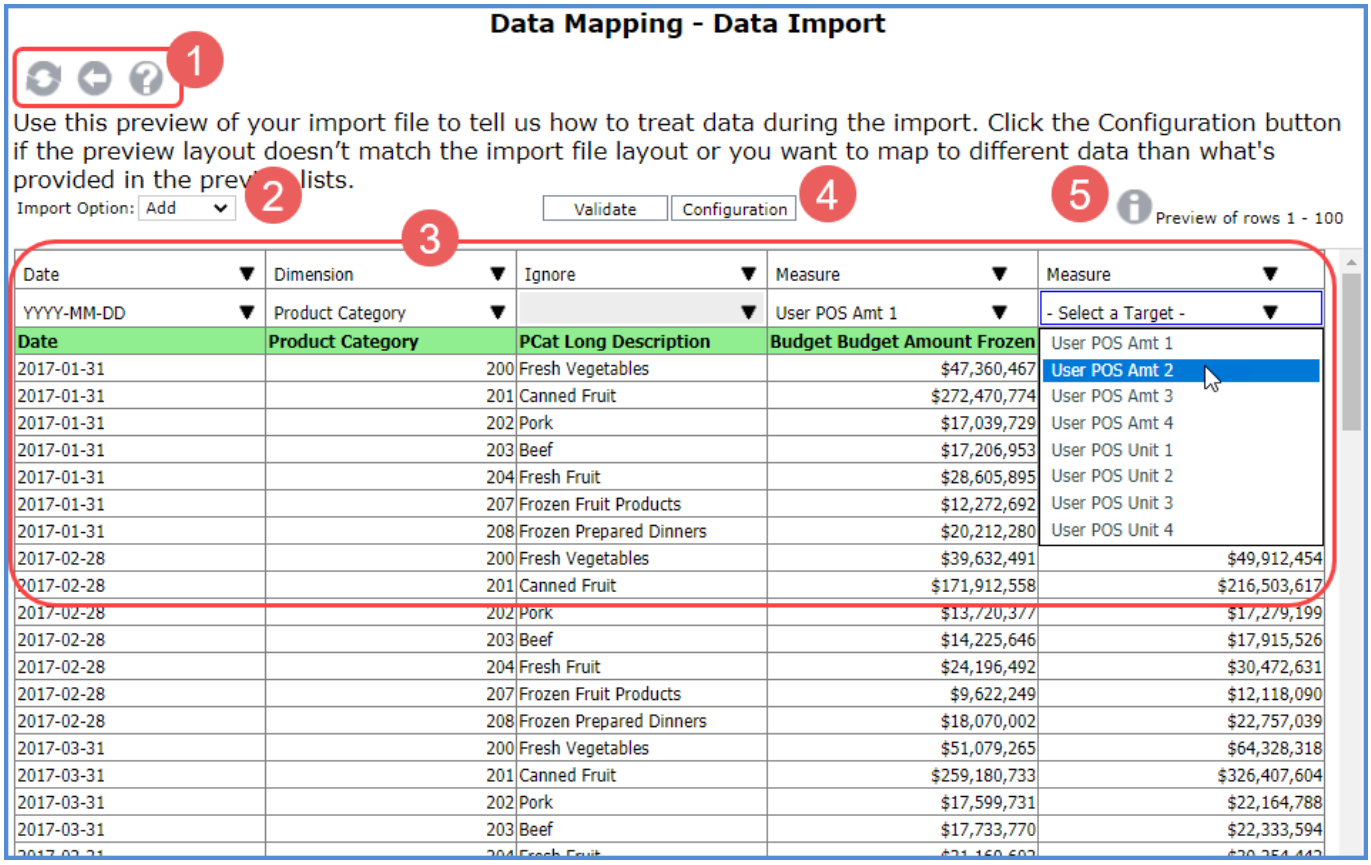

| | |
|---|---|
| 1 | **Toolbar -**<br>• **Save** - Click to save changes made to categories.<br>• **Help** - Click to open help that is specific to managing categories. |
| 2 | Categories for your Stratum environment show in this window.* Their status in this window determines which sources of data can be used for them. Details follow.<br>**Data Controlled By** – Determines the source of data for a category.<br>• **Corporate** – This type of data is typically from corporate business systems such as Order Entry, ERP or CRM and is usually controlled by IT. For example, measures from 'Corporate' controlled categories can be used with Data Copy functionality, which allows users to copy Stratum data from one measure to another measure.<br>• **User** – This type of data is controlled by the user community. Users can import data from corporate business systems as well as external data sources such as demographics, housing trends, or other unique data that will compliment your Stratum data. For example, measures from 'User' controlled categories can be used with Data Import functionality, which allows users to import measure data from Excel spreadsheets.<br>**Data Table –** This column is only populated with information when a category has been defined as user controlled. The column shows the name of a fact table that is specific to that category and its Data Import transaction data. Tables are part of the Stratum Server database.<br>***Note:** If a category you expect to see in this window isn't displayed here, see the topic "Why Isn't A Stratum Category Displaying In The Category Window?". |
| 3 | **Search Option** – Use this field to search for categories by name. |

## Data Import List Window




| | |
|---|---|
| 1 | **Toolbar** –<br>• **New** - Click to set up a new Data Import.<br>• **See Processing Details For A Data Import** - Select a Data Import and then click this button to see a summary of all properties for the import. See also Review Processing Details For A Data Import.<br>• **Delete** - Select a Data Import and then click the Delete button to delete its applicable records such as its processing report details and upload file. The imported data is not impacted by the delete.<br>• **Help** - Click to open help that is specific to working with Data Imports. |
| 2 | **Data Imports and Status Information** – The list window shows all Data Imports that users have created and submitted for processing. Details include when imports were submitted and when their processing was completed. The status for a Data Import will be In Process, Completed, or Error. |

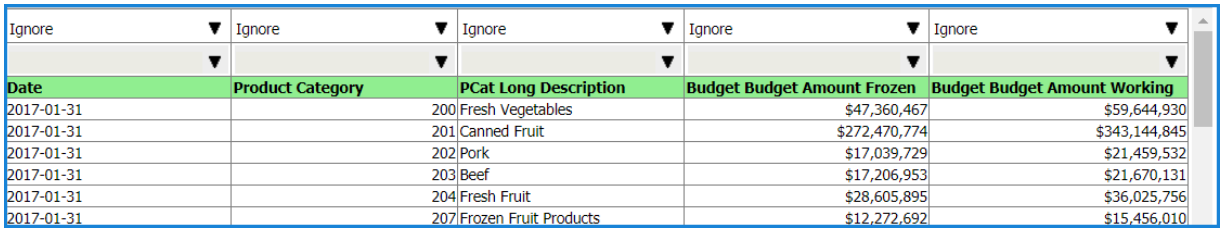
## Data Mapping – Data Import Window




| | |
|---|---|
| 1 | **Toolbar** -<br>• **Submit The Data Import For Processing** - Click to process the Data Import. Once you confirm you want to proceed, the mapping window closes and you're returned to the Data Import list window.<br>• **Exit** - Click to exit this window and return to the Data Import list window. Nothing will be saved or processed for the import you were setting up.<br>• **Help** - Click to open help that is specific to working with Data Imports. |
| 2 | **Import Option** – Change this option if needed after initial configuration. Choose to Add the imported data or Replace existing data with imported data. A Replace clears existing data from ALL measures of the Target category then adds the new data. |
| 3 | **Data Mapping Preview** – This section shows up to a 100 row preview of your import file. The drop-down lists in the first two rows are for use in mapping import file data to Stratum – use them to tell Viewer what's in each column, what to do with the data during the import, and what columns if any to ignore. Row(s) highlighted in green are the start of you import file and are what you told Viewer are the header rows in the file (through a property in Import Configuration).<br>**Note:** Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the header rows contain dimension names, descriptions, and measure names. |

This example shows a progression of identifying what's in your import file using drop-down lists in the mapping window. Note that as you continue to do imports in Viewer after your initial one, some mapping may be done for you automatically based on what Viewer has learned about your prior import habits. You can change automatic selections if needed.

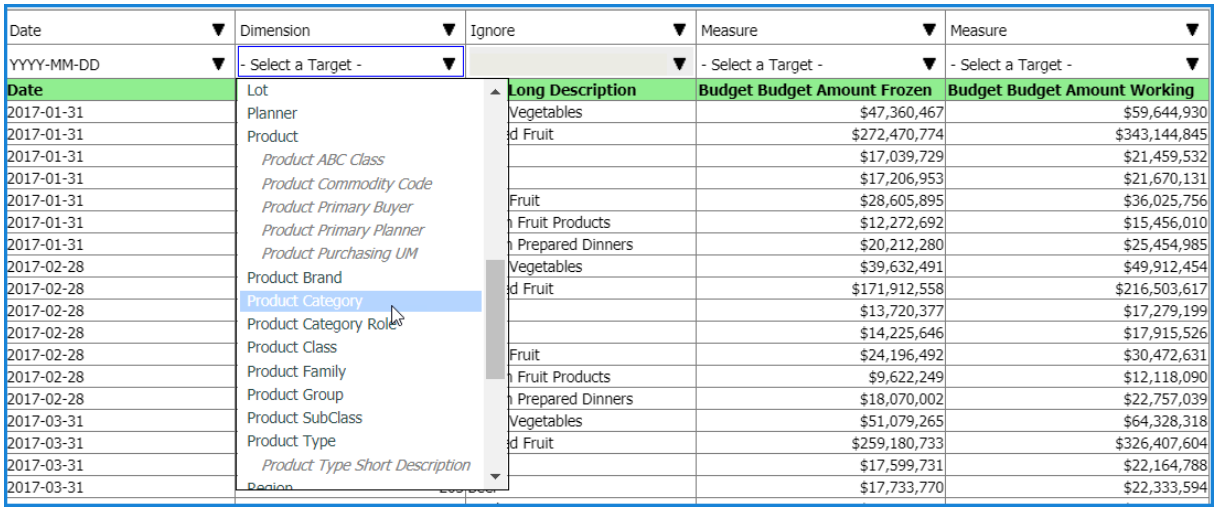
First, the preview has no mapping properties selected yet. All columns defaulted to Ignore. By default, Data Import assumes that the import file has one header row.



| Ignore | Ignore | Ignore | Ignore | Ignore |
|---|---|---|---|---|
| **Date** | **Product Category** | **PCat Long Description** | **Budget Budget Amount Frozen** | **Budget Budget Amount Working** |
| 2017-01-31 | 200 | Fresh Vegetables | $47,360,467 | $59,644,930 |
| 2017-01-31 | 201 | Canned Fruit | $272,470,774 | $343,144,845 |
| 2017-01-31 | 202 | Pork | $17,039,729 | $21,459,532 |
| 2017-01-31 | 203 | Beef | $17,206,953 | $21,670,131 |
| 2017-01-31 | 204 | Fresh Fruit | $28,605,895 | $36,025,756 |
| 2017-01-31 | 207 | Frozen Fruit Products | $12,272,692 | $15,456,010 |

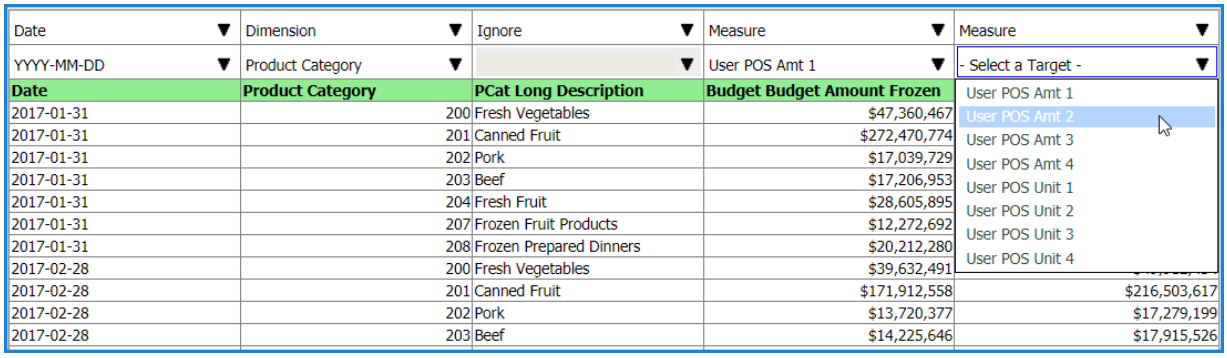
Drop-down lists at the top were used to identify what's in each column.

- First column contains Date info and the user specified the date format.
- Next column is a Dimension and the user is selecting the dimension from the provided drop-down list.
- The last two columns are Measures. More on those in the final image.




| Date | | | | |
|---|---|---|---|---|
| **Date** | | **Long Description** | **Budget Budget Amount Frozen** | **Budget Budget Amount Working** |
| 2017-01-31 | | Vegetables | $47,360,467 | $59,644,930 |
| 2017-01-31 | | d Fruit | $272,470,774 | $343,144,845 |
| 2017-01-31 | | | $17,039,729 | $21,459,532 |
| 2017-01-31 | | | $17,206,953 | $21,670,131 |
| 2017-01-31 | | Fruit | $28,605,895 | $36,025,756 |
| 2017-01-31 | | Fruit Products | $12,272,692 | $15,456,010 |
| 2017-01-31 | | Prepared Dinners | $20,212,280 | $25,454,985 |
| 2017-02-28 | | Vegetables | $39,632,491 | $49,912,454 |
| 2017-02-28 | | d Fruit | $171,912,558 | $216,503,617 |
| 2017-02-28 | | | $13,720,377 | $17,279,199 |
| 2017-02-28 | | | $14,225,646 | $17,915,526 |
| 2017-02-28 | | Fruit | $24,196,492 | $30,472,631 |
| 2017-02-28 | | Fruit Products | $9,622,249 | $12,118,090 |
| 2017-02-28 | | Prepared Dinners | $18,070,002 | $22,757,039 |
| 2017-03-31 | | Vegetables | $51,079,265 | $64,328,318 |
| 2017-03-31 | | d Fruit | $259,180,733 | $326,407,604 |
| 2017-03-31 | | | $17,599,731 | $22,164,788 |
| 2017-03-31 | | | $17,733,770 | $22,333,594 |

The Target drop-down list under each Measures are used to choose the target Stratum measures to receive the imported data. The mapping is complete, and the user can process the import.



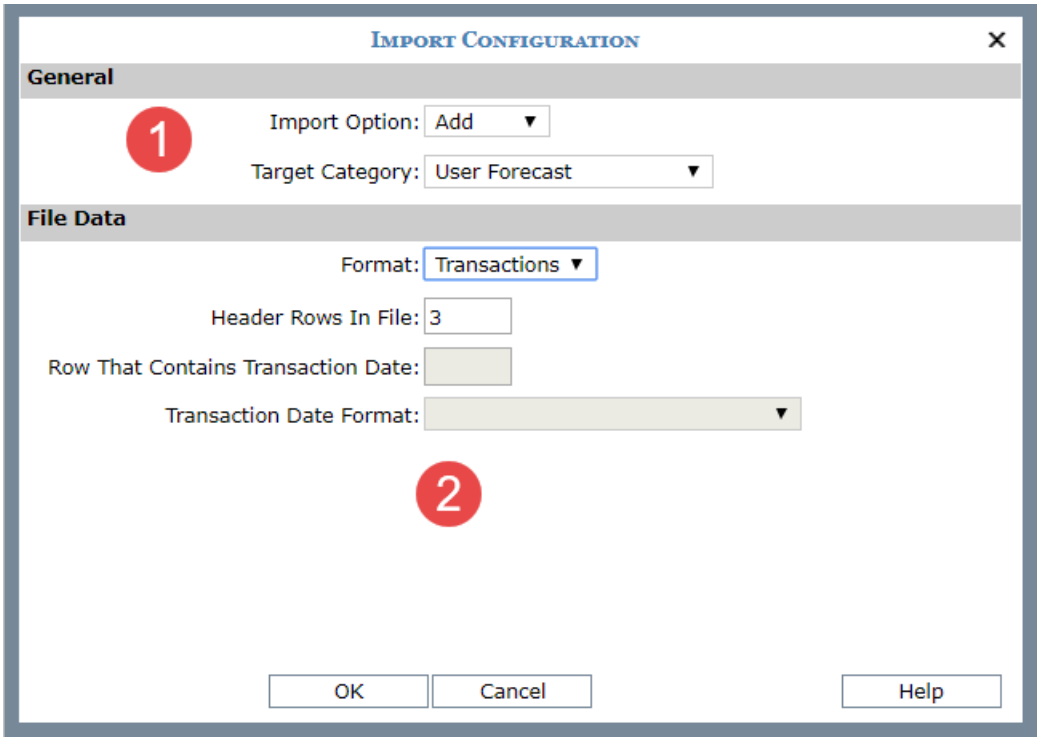

| Date | Dimension | Ignore | Measure | Measure |
|---|---|---|---|---|
| **Date** | **Product Category** | **PCat Long Description** | **Budget Budget Amount Frozen** | |
| 2017-01-31 | 200 | Fresh Vegetables | $47,360,467 | |
| 2017-01-31 | 201 | Canned Fruit | $272,470,774 | |
| 2017-01-31 | 202 | Pork | $17,039,729 | |
| 2017-01-31 | 203 | Beef | $17,206,953 | |
| 2017-01-31 | 204 | Fresh Fruit | $28,605,895 | |
| 2017-01-31 | 207 | Frozen Fruit Products | $12,272,692 | |
| 2017-01-31 | 208 | Frozen Prepared Dinners | $20,212,280 | |
| 2017-02-28 | 200 | Fresh Vegetables | $39,632,491 | |
| 2017-02-28 | 201 | Canned Fruit | $171,912,558 | $216,503,617 |
| 2017-02-28 | 202 | Pork | $13,720,377 | $17,279,199 |
| 2017-02-28 | 203 | Beef | $14,225,646 | $17,915,526 |

4

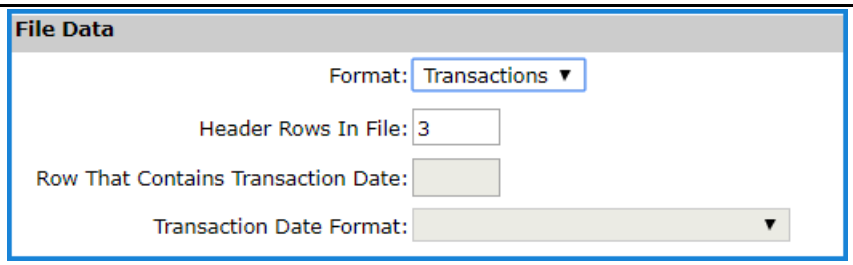
**Validate** – Click anytime while mapping your data to validate the mapping. If Viewer encounters something like an invalid date or mapping selections that are required but haven't been made yet, it will present a message about those issues.

| | |
|---|---|
| | **Configuration** – Click to access the Import Configuration window. From there, you can edit basic properties that tell Viewer things like the type of file being imported (Transactions or Time Series) and how many header rows are in the import file. |
| 5 | **Category Information** – Click to open details about the category you have identified as the import's Target category (the one to receive imported data). The window tells you which dimensions you've mapped to and identifies others belonging to the category that will be impacted by the import. See the Category Information Window topic to learn about details displayed in this window. |

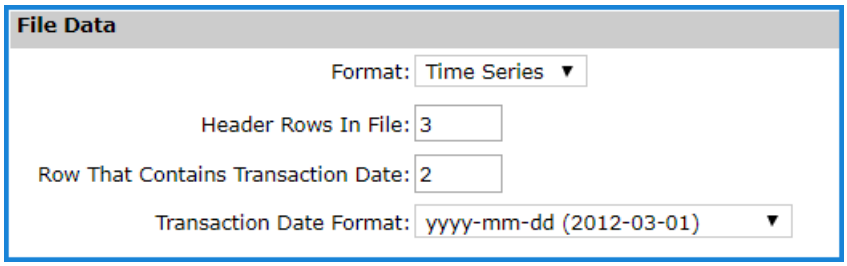
## Import Configuration Window




| | |
|---|---|
| 1 | **General –**<br>• **Import Option** - Choose to Add the imported data or Replace existing data with imported data. A Replace clears existing data from ALL measures of the Target category then adds the new data.<br>• **Target Category** - The Target category is the one that will receive imported data. Measures from that category will be available to select when you map imported data to Stratum.<br>**Note:** Once you have done a few imports, Data Import learns about your import data habits and can do some automatic configuration and Data Mapping. When that happens, the Import Configuration window is bypassed. You can open it anytime by clicking the Configuration button in the Data Mapping window. |
| 2 | **File Data** – Make selections about how your file is set up including the format and respective selections. **Format i**s either Transactions or Time Series. Transaction means the dates for an import are in a column in a file. Time Series means dates are in a header row across the top of the file. The remaining selections to make depend on the selected import format.<br>• **Transactions** – with this import type, you need to identify how many **header rows** are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension, descriptions, or measure names. |




- **Time Series** – with this import type, you need to identify how many **header rows** are in the import file, which of those rows contains the **transaction date** for each measure column, and the **format the date** is in such as yyyy-mm-dd.

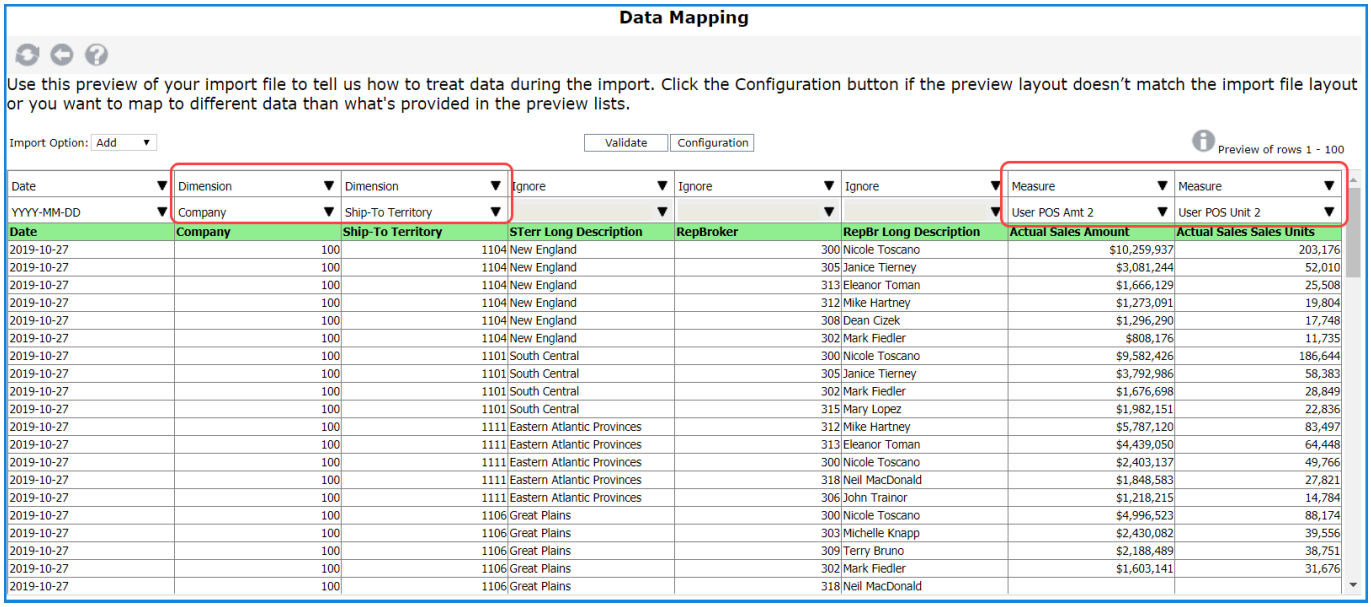



- **Valid formats for dates** in your imports are the following:

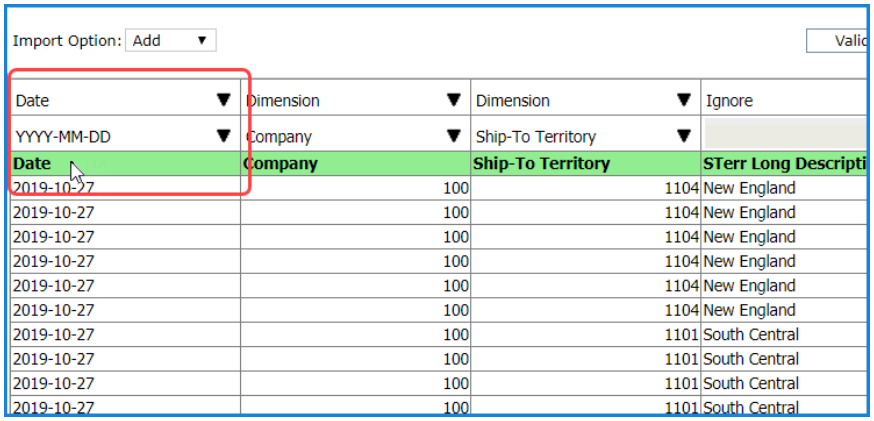
## Automatic Data Mapping And Import Configuration

Data Import will automatically make mapping selections for you as it picks up mapping and data patterns from prior imports. Automatic mapping can save you some steps in the import process. It takes into account what categories, measures, dimensions, and column captions were used in prior imports. If it can identify data in a column as a particular dimension, measure, or as a date, then it will select the column's mapping properties for you in the Data Mapping window. Data Import starts by looking for a category match, then matches in measure columns. If matches can be made related to category, Data Import looks for mapping matches in dimension columns. You can adjust all selections manually if needed.

In the following example, the measures and two dimensions had their mapping selections set as soon as the import preview loaded in the Data Mapping window. The user can leave those selections as is, change them to a different selection, or set any of the columns to Ignore.




If you use the word "Date" as the description in the header row for a date column in your import file, Data Import can automatically identify that column as a "Date" column for you. Then, you'll only need to select the date format used in that column. Format defaults to yyyy-mm-dd.



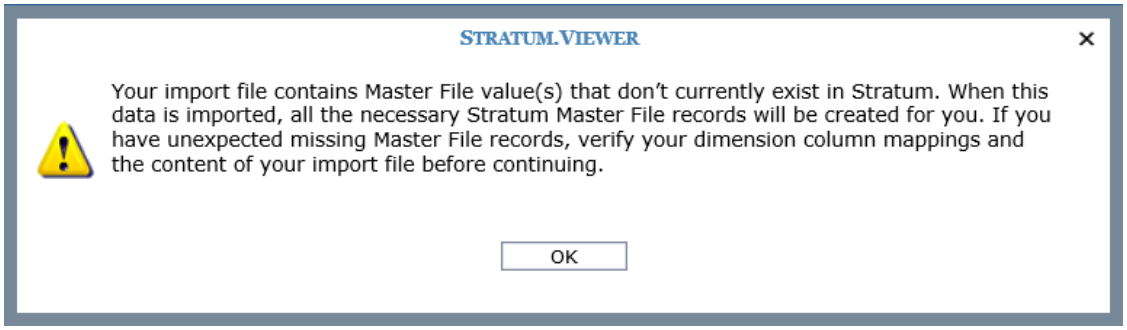

 

## Imports Where Stratum Master Data Doesn't Exist

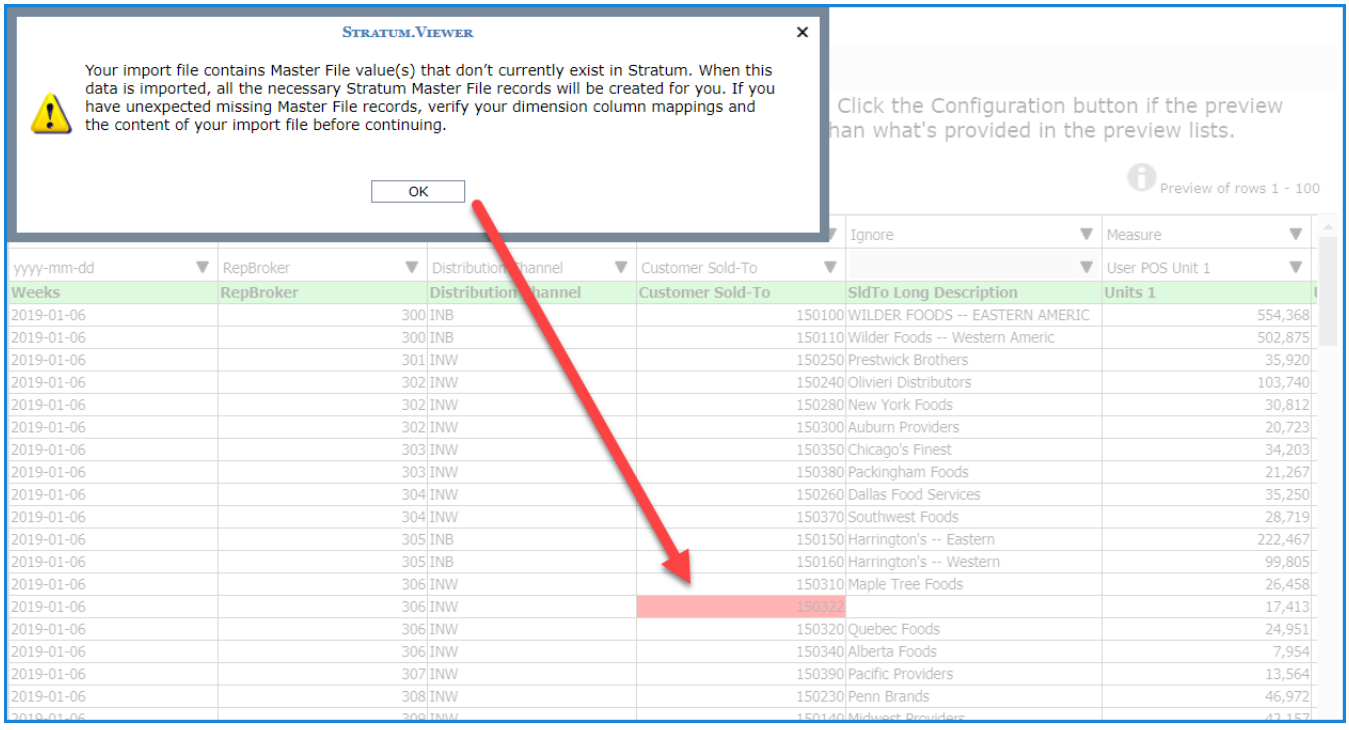
Import files contain dimensions, measures, and date values which are used to determine where data gets mapped and imported to once your import is processed. Data Import performs some validation checks on the data in your import file to make sure everything is in place to proceed with the import. One type of message you might see as a result of this validation is the following about Master data that doesn't exist. That happens if Master data doesn't already exist in Stratum for some of the dimension values in your import file.

This type of message is an informational message and won't prevent you from being able to process an import. Values that the message pertains to will be highlighted in the Data Mapping preview of your import – though some of the value may be in rows beyond the 100 row preview. Some options if you see this message: proceed with the import, review and adjust your Data Mappings for the column then proceed with import, or cancel the import to adjust your import file then try the import again (for example, remove the impacted rows if you don't want them imported because you don't want Master File records created for the values).

Reviewing your selections in the Data Mapping window is recommended to make sure that you have mapped each column to the correct dimension. For example, you meant to pick Product Brand but picked Product Class by mistake when mapping a column of Product Brand values. Cancelling and reviewing your file is another option to make sure you really want that data in Stratum. For example, make sure the values that prompted the message aren't typos that would bring in unwanted Master File values.




Here's an example import that promped a message about Master File values that don't exist. A "150322" value for the Customer Sold-To dimension does not have master file records. The message showed and the value was higlighted as part of Data Import's Master File records validations.

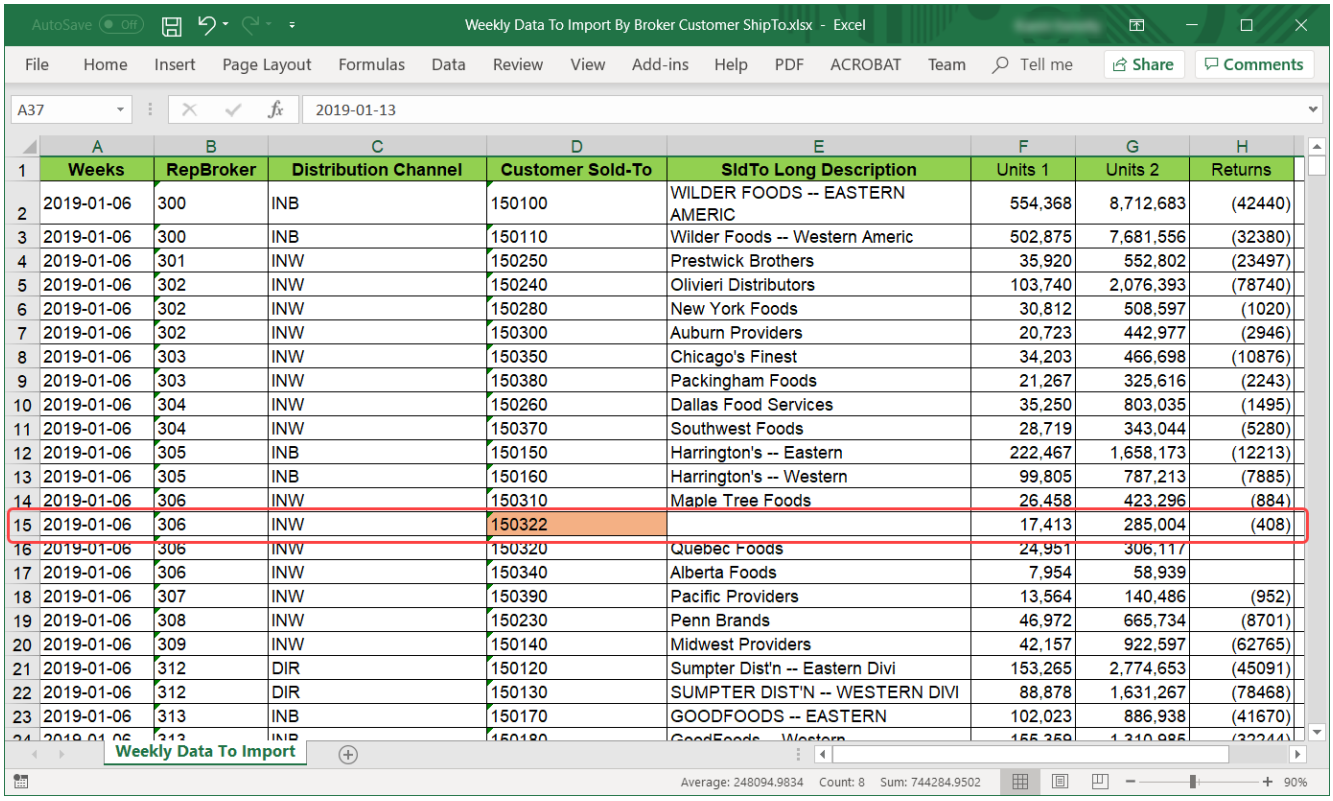


Here's a closeup of the value that caused the message to display. The user can proceed with the import, leaving that value in place – in which case, Data Import will create the needed Master data. Or, the user can cancel the import, correct or remove the  row from the import file, and try the import again. The import file and impacted row in it is shown in the last image that follows.

Validate | Configuration | Preview of ro

| | Dimension | Dimension | Ignore | Measure |
|---|---|---|---|---|
| | Distribution Channel | Customer Sold-To | | User POS Unit 1 |
| | **Distribution Channel** | **Customer Sold-To** | **SldTo Long Description** | **Units 1** |
| 300 | INB | 150100 | WILDER FOODS -- EASTERN AMERIC | |
| 300 | INB | 150110 | Wilder Foods -- Western Americ | |
| 301 | INW | 150250 | Prestwick Brothers | |
| 302 | INW | 150240 | Olivieri Distributors | |
| 302 | INW | 150280 | New York Foods | |
| 302 | INW | 150300 | Auburn Providers | |
| 303 | INW | 150350 | Chicago's Finest | |
| 303 | INW | 150380 | Packingham Foods | |
| 304 | INW | 150260 | Dallas Food Services | |
| 304 | INW | 150370 | Southwest Foods | |
| 305 | INB | 150150 | Harrington's -- Eastern | |
| 305 | INB | 150160 | Harrington's -- Western | |
| 306 | INW | 150310 | Maple Tree Foods | |
| 306 | INW | 150322 | | |
| 306 | INW | 150320 | Quebec Foods | |
| 306 | INW | 150340 | Alberta Foods | |
| 307 | INW | 150390 | Pacific Providers | |
| 308 | INW | 150230 | Penn Brands | |

Here's the impacted row from the import file in this example.

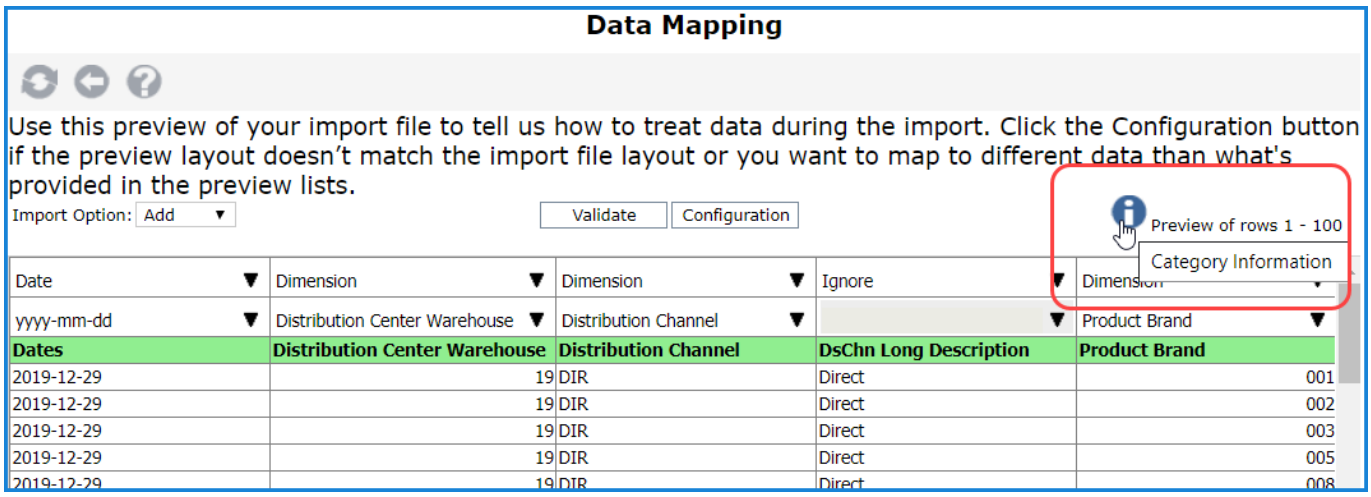


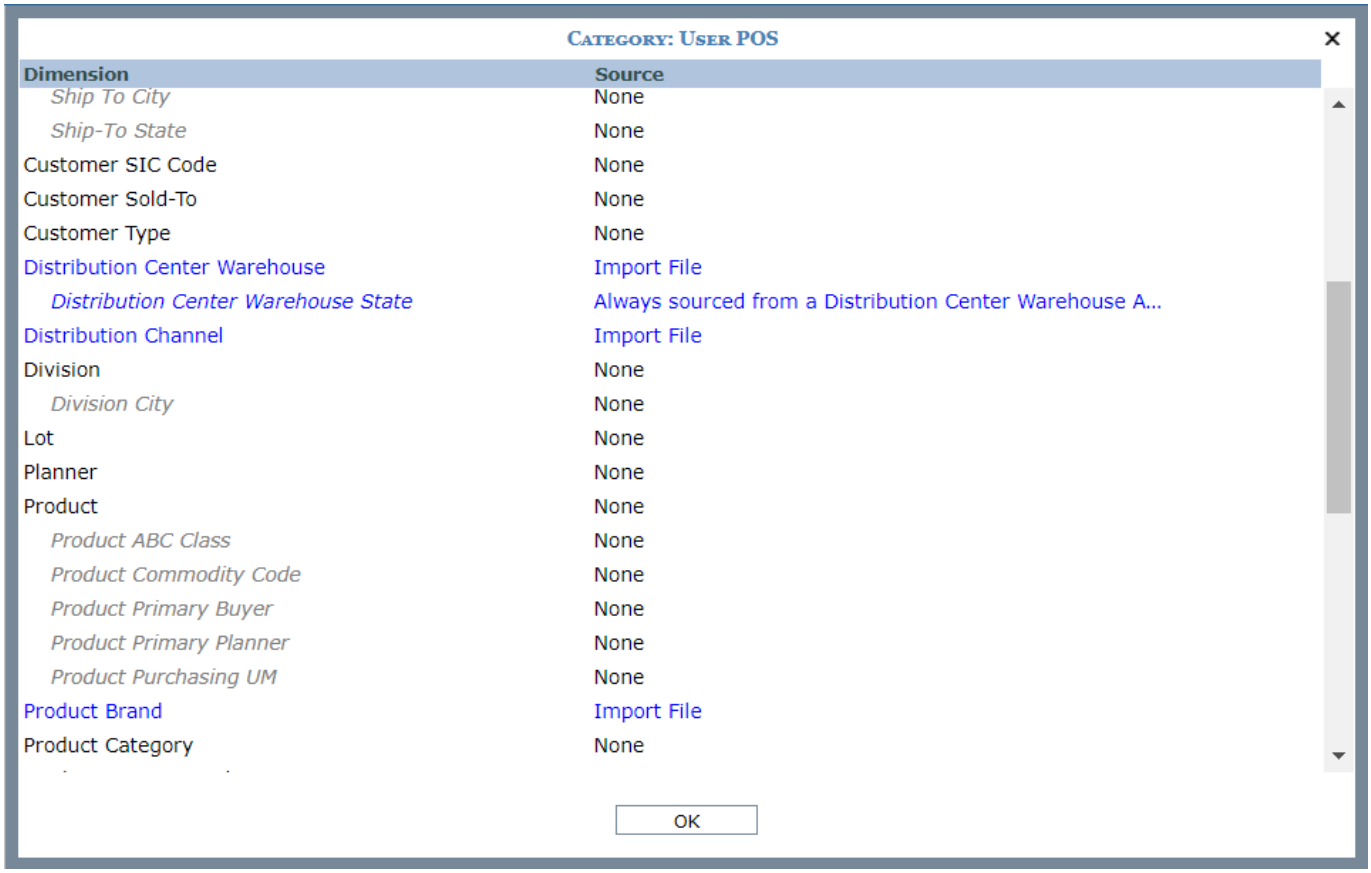

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | **Weeks** | **RepBroker** | **Distribution Channel** | **Customer Sold-To** | **SldTo Long Description** | Units 1 | Units 2 | Returns |
| 2 | 2019-01-06 | 300 | INB | 150100 | WILDER FOODS -- EASTERN AMERIC | 554,368 | 8,712,683 | (42440) |
| 3 | 2019-01-06 | 300 | INB | 150110 | Wilder Foods -- Western Americ | 502,875 | 7,681,556 | (32380) |
| 4 | 2019-01-06 | 301 | INW | 150250 | Prestwick Brothers | 35,920 | 552,802 | (23497) |
| 5 | 2019-01-06 | 302 | INW | 150240 | Olivieri Distributors | 103,740 | 2,076,393 | (78740) |
| 6 | 2019-01-06 | 302 | INW | 150280 | New York Foods | 30,812 | 508,597 | (1020) |
| 7 | 2019-01-06 | 302 | INW | 150300 | Auburn Providers | 20,723 | 442,977 | (2946) |
| 8 | 2019-01-06 | 303 | INW | 150350 | Chicago's Finest | 34,203 | 466,698 | (10876) |
| 9 | 2019-01-06 | 303 | INW | 150380 | Packingham Foods | 21,267 | 325,616 | (2243) |
| 10 | 2019-01-06 | 304 | INW | 150260 | Dallas Food Services | 35,250 | 803,035 | (1495) |
| 11 | 2019-01-06 | 304 | INW | 150370 | Southwest Foods | 28,719 | 343,044 | (5280) |
| 12 | 2019-01-06 | 305 | INB | 150150 | Harrington's -- Eastern | 222,467 | 1,658,173 | (12213) |
| 13 | 2019-01-06 | 305 | INB | 150160 | Harrington's -- Western | 99,805 | 787,213 | (7885) |
| 14 | 2019-01-06 | 306 | INW | 150310 | Maple Tree Foods | 26,458 | 423,296 | (884) |
| 15 | 2019-01-06 | 306 | INW | 150322 | | 17,413 | 285,004 | (408) |
| 16 | 2019-01-06 | 306 | INW | 150320 | Quebec Foods | 24,951 | 306,117 | |
| 17 | 2019-01-06 | 306 | INW | 150340 | Alberta Foods | 7,954 | 58,939 | |
| 18 | 2019-01-06 | 307 | INW | 150390 | Pacific Providers | 13,564 | 140,486 | (952) |
| 19 | 2019-01-06 | 308 | INW | 150230 | Penn Brands | 46,972 | 665,734 | (8701) |
| 20 | 2019-01-06 | 309 | INW | 150140 | Midwest Providers | 42,157 | 922,597 | (62765) |
| 21 | 2019-01-06 | 312 | DIR | 150120 | Sumpter Dist'n -- Eastern Divi | 153,265 | 2,774,653 | (45091) |
| 22 | 2019-01-06 | 312 | DIR | 150130 | SUMPTER DIST'N -- WESTERN DIVI | 88,878 | 1,631,267 | (78468) |
| 23 | 2019-01-06 | 313 | INB | 150170 | GOODFOODS -- EASTERN | 102,023 | 886,938 | (41670) |

## Review Dimension Details For A Target Category

The Data Mapping window for previewing and mapping imports to Stratum includes a Category Information button. Click it to see details about the import's Target category and its dimensions. A Category window opens. It tells you which dimensions you've mapped to and identifies others from the Target category that will be impacted by the import. The color of text in this window offers a clue to which dimensions will be impacted by an import. Blue text indicates the dimension will get populated based on the import data. Black and grey text indicates the dimension is not impacted by the import data and will be populated with only the dimension's default value.

See the Category Information Window topic for complete details.



## Review Processing Details For A Data Import

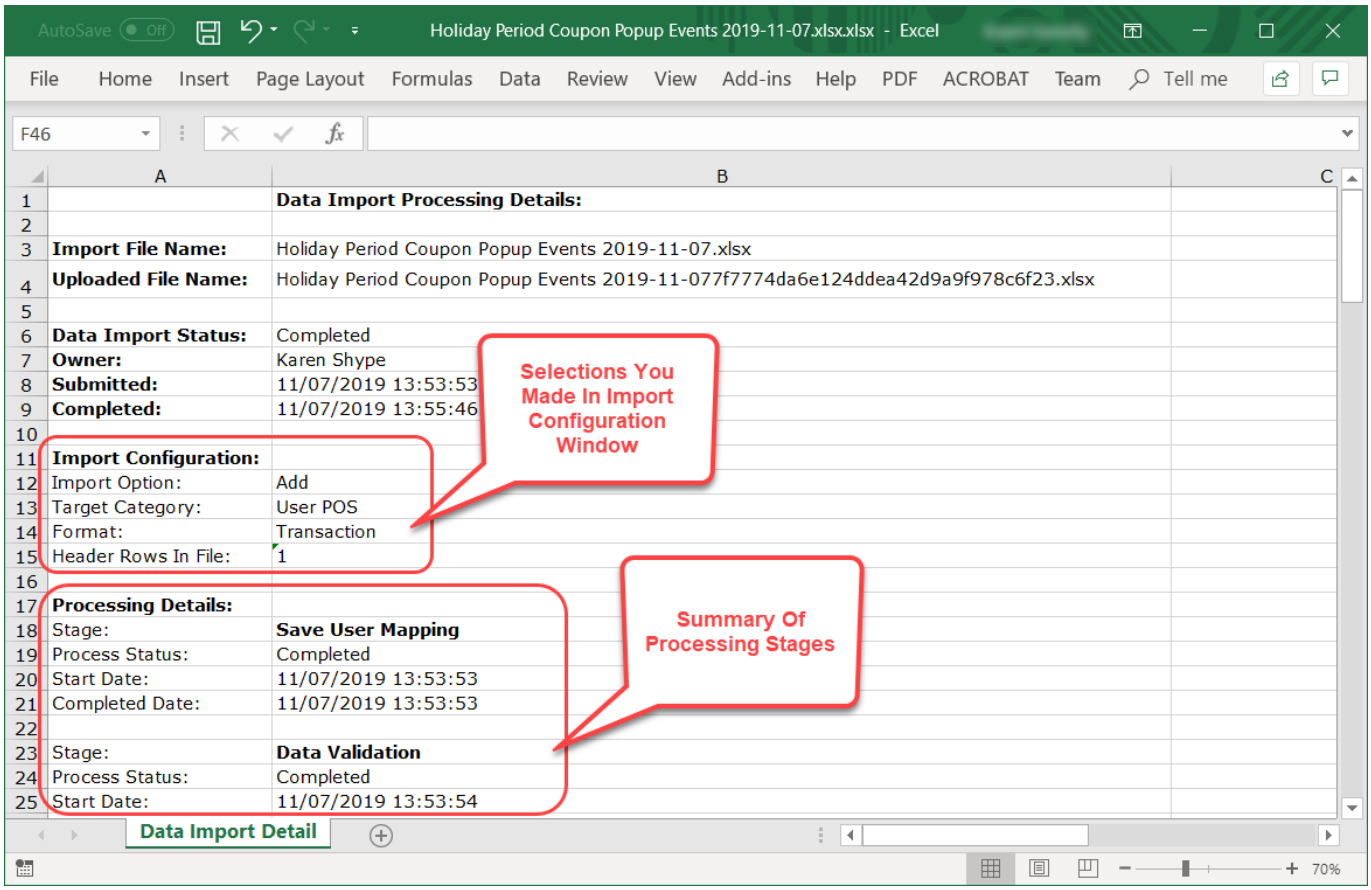
The Processing report provides detailed summaries of a Data Import. The report is an Excel file containing all details about a Data Import, such as the Target category for the import, how many rows of data were imported, and what dimensions and measures the import data was mapped to in Stratum. The report also indicates the status of the different stages of processing for a Data Import. To open a report:

1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.

2. In the Data Import List window, select the Data Import for which you want to see a report.

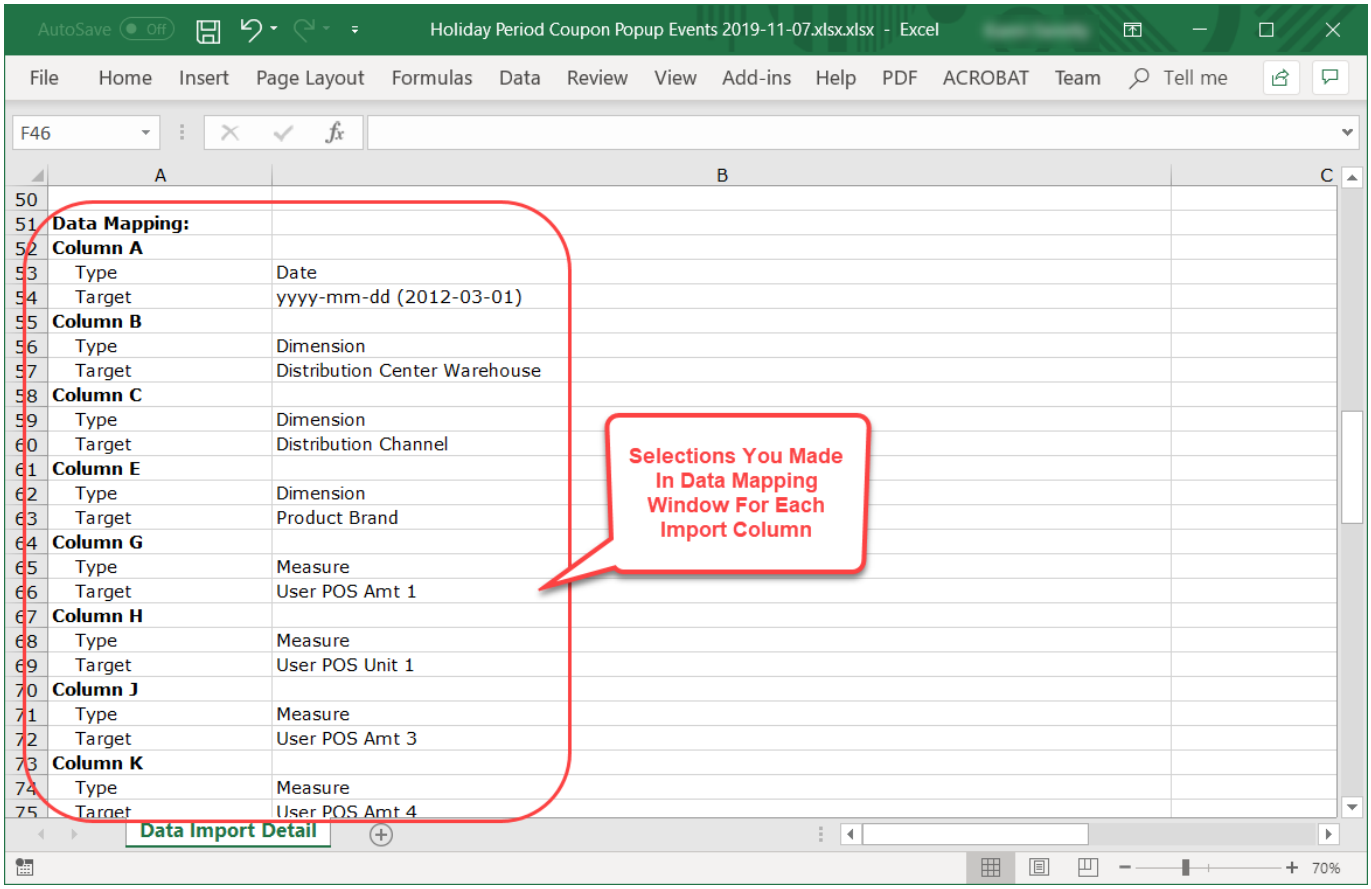
3. Click See Processing Details For A Data Import .

The start of the report shows general details like the name of the import file, who created and processed the import, and when it was processed. Next is a summary of the six processing stages for the import. The summary for each includes its status, start date/time, and end date/time. The stages are Save User Mapping, Data Validation, Common Area To Fact Table, Validate Master Record, Fact Table To Cube, and Send Email. Fact tables are where imported data is stored.

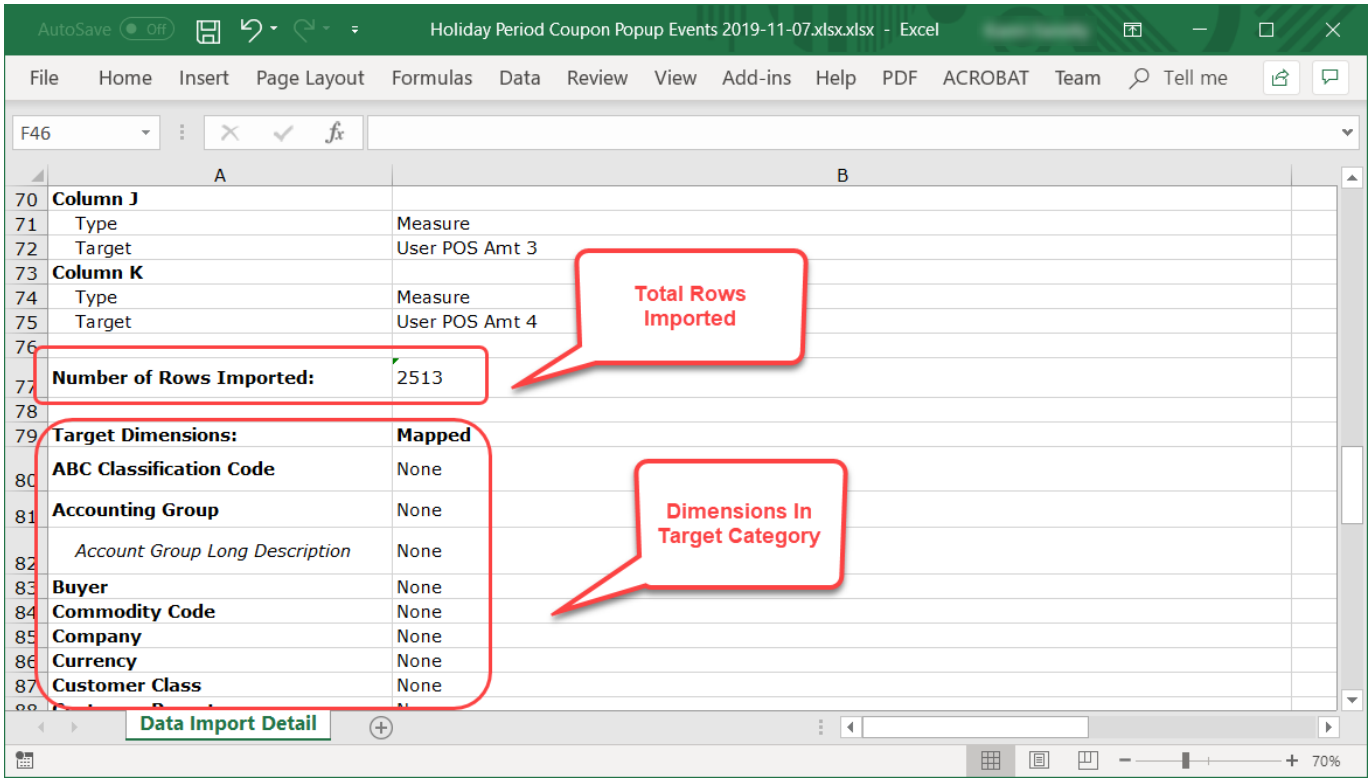



| | A | B |
|---|---|---|
| 1 | | **Data Import Processing Details:** |
| 2 | | |
| 3 | **Import File Name:** | Holiday Period Coupon Popup Events 2019-11-07.xlsx |
| 4 | **Uploaded File Name:** | Holiday Period Coupon Popup Events 2019-11-077f7774da6e124ddea42d9a9f978c6f23.xlsx |
| 5 | | |
| 6 | **Data Import Status:** | Completed |
| 7 | **Owner:** | Karen Shype |
| 8 | **Submitted:** | 11/07/2019 13:53:53 |
| 9 | **Completed:** | 11/07/2019 13:55:46 |
| 10 | | |
| 11 | **Import Configuration:** | |
| 12 | Import Option: | Add |
| 13 | Target Category: | User POS |
| 14 | Format: | Transaction |
| 15 | Header Rows In File: | 1 |
| 16 | | |
| 17 | **Processing Details:** | |
| 18 | Stage: | **Save User Mapping** |
| 19 | Process Status: | Completed |
| 20 | Start Date: | 11/07/2019 13:53:53 |
| 21 | Completed Date: | 11/07/2019 13:53:53 |
| 22 | | |
| 23 | Stage: | **Data Validation** |
| 24 | Process Status: | Completed |
| 25 | Start Date: | 11/07/2019 13:53:54 |

Next section shows each column in your import file and how it was mapped to Stratum items in the Data Mapping window. The section shows if a column was set to Dimension, Measure, or Date. You'll only see a Date column in reports for Transactions type imports. The Data Mapping section of the report also shows what format was selected for a Date column (when applicable) and the Stratum target for Dimension and Measure columns.

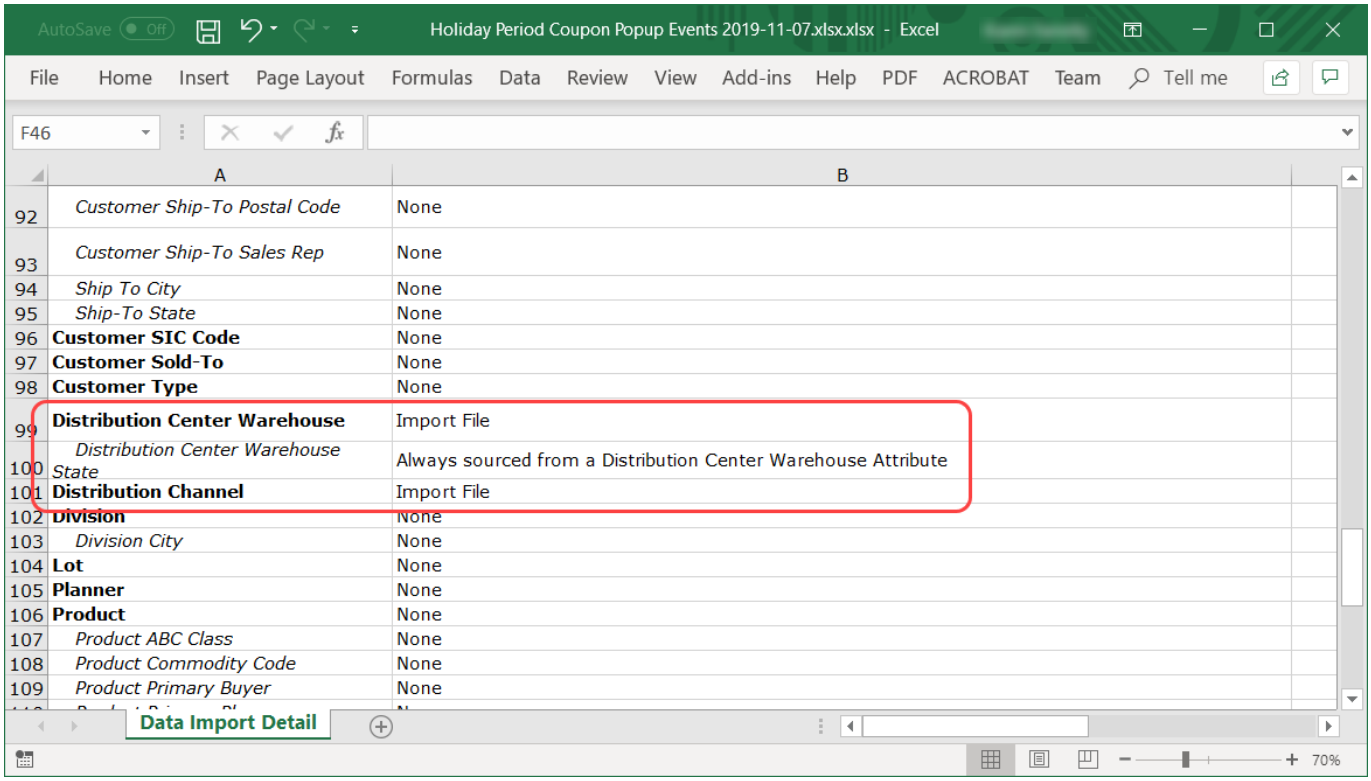



You can see how many total rows were imported by looking at the Number of Rows Imported section of the file. After that, there's a Target Dimensions section. That section is explained after the next image in this topic.

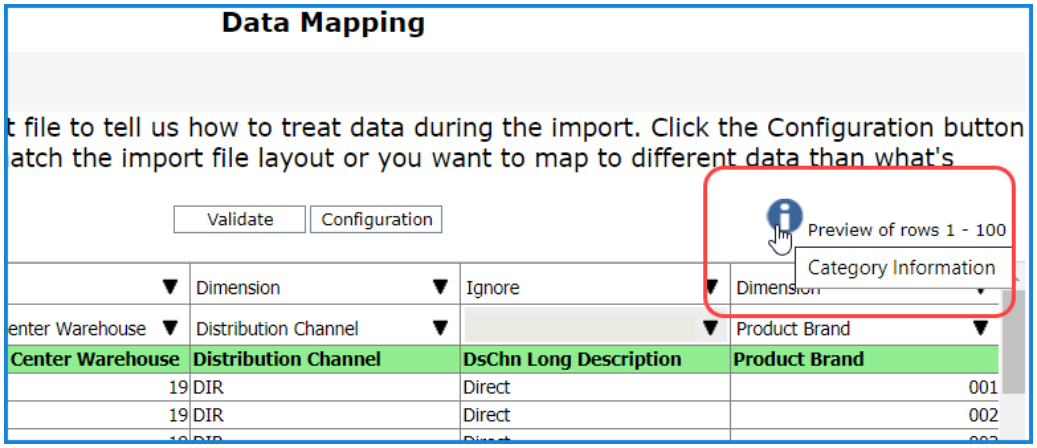


The Target Dimensions section and its Mapped details tell you which dimensions belong to the Target category, which dimension have been directly mapped to for the import, and what other additional dimensions will be impacted by the import. The Mapped column will indicate one of the following for a dimension:

- **Import File** – means the data for this dimension will come directly from the import file. This dimension has been directly mapped in the Data Mapping window for the import.
- **"Always sourced from a ... Attribute"** – means that the data for this dimension will be derived from its associated parent dimension. These are virtual dimensions created from an attribute of their parent dimensions.
- **"Sourced from … Previous Level Definition"** – means that the data for this dimension will be derived from another dimension using Stratum previous level relationships.
- **None** – means the dimension wasn't included in the import file or values for it couldn't be sourced from previous level definitions or an attribute of a parent dimension. The only place import data will go to for these dimensions is their default value (typically represented by the "?" character in views).




The details that show in the Target Dimensions section of the processing report are the same details that show when you click the Category Information button in the Data Mapping window while setting up your import.



## Understanding Your Imported Data

The way data gets imported to the various dimensions in your Stratum environment is influenced by a few things, including what dimension values were in the import file and what dimensions you mapped to during import set up. Read on to learn about what you can expect to see in Stratum when you look at your imported data.

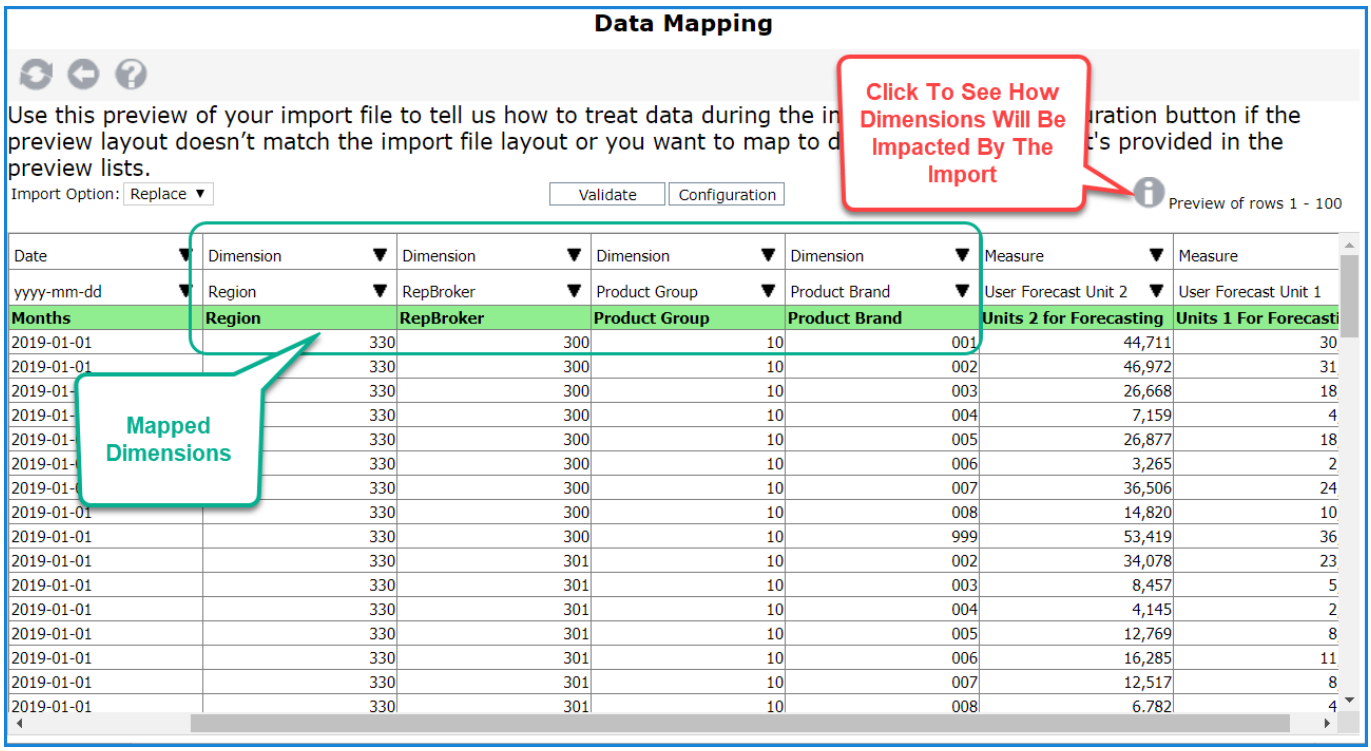
**Note:** More details about what influences placement of imported data are in the Examples section of this Data Import help. If you have questions about where data ends up, review the processing report for an import. It summarizes how measures and dimensions were mapped and shows the source of data for each dimension associated with the import's Target category.

Here's how dimensions can be impacted by an import and which of its values will be impacted. An example and more details follow this graphic.

| Import File Dimensions | Previous Level Dimensions | Attribute-Based Dimensions |
|---|---|---|
| • Dimensions that are mapped to a column of data from the import file<br>• All values come directly from the import file<br>• "Import File" shows as their data source in the import processing report | • Dimensions that have associations with other dimensions through Stratum previous level relationships<br>• Their data is derived from another dimension based on Stratum previous level details<br>• "Sourced from ... Previous Level Definition" shows as their data source in the import processing report | • Also known as virtual dimensions; they're created from the attribute of another dimension<br>• Only affected if the parent dimension they're based on get updated by the import<br>• "Always sourced from a ... Attribute" is listed as their data source in the import processing report |

**NOTE:** Dimensions that aren't included in the import file or that cannot be derived from other dimensions are updated with their default value. The source for these dimensions is "None" in the import processing report.

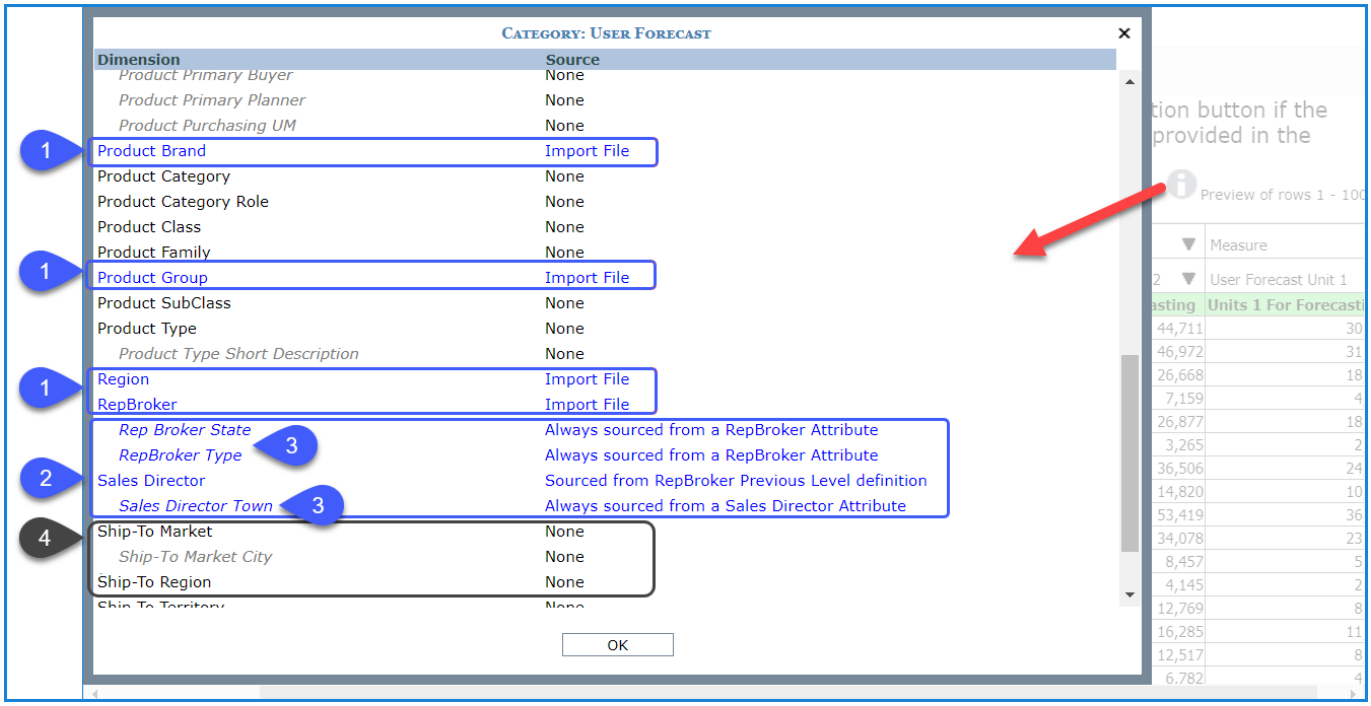
The import shown in the next image has four dimensions in its import file. All were mapped to Stratum dimensions. Their imported data will come directly from values in the import file. The second image shows you the Category Information window for this import. That window is accessed from the Data Mapping window and shows how the import will treat various dimensions.



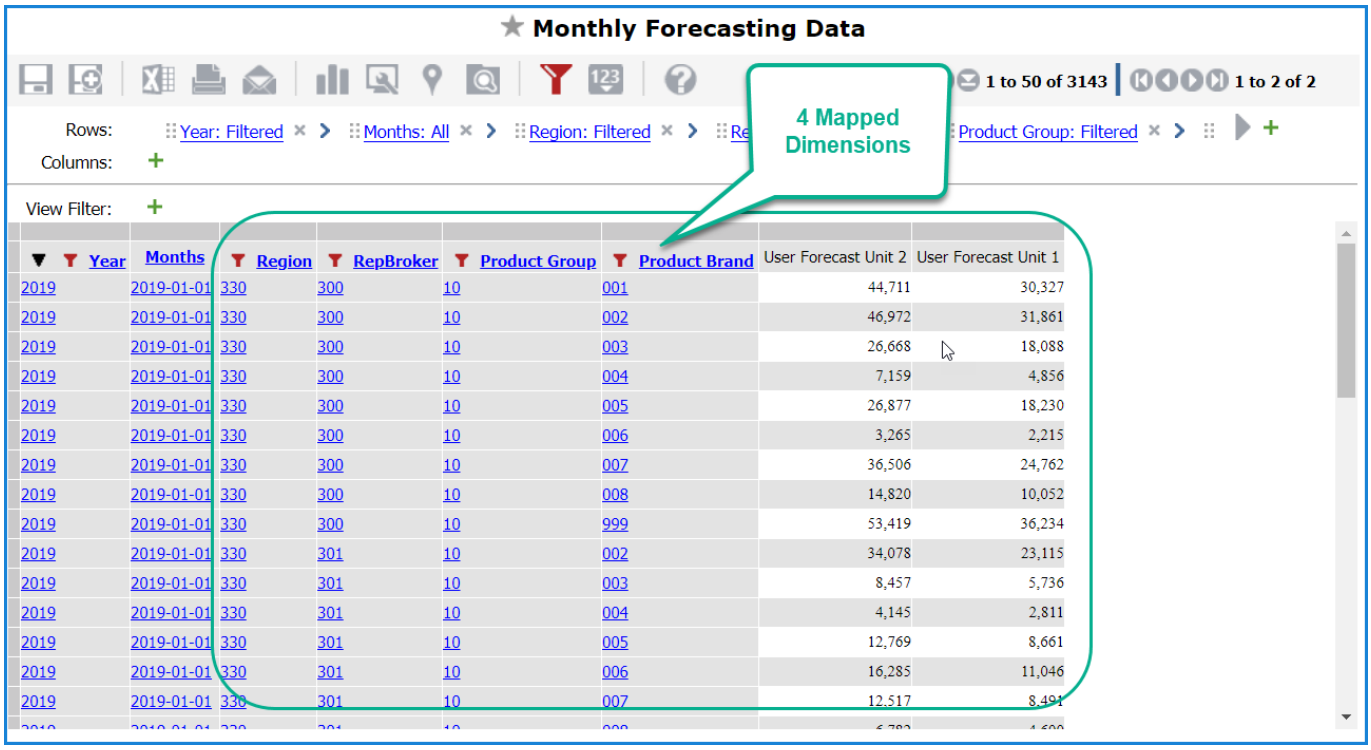

Here's some things you can see in the Category window:

1. Product Brand, Product Group, Region, and RepBroker are the mapped dimensions.
2. Sales Director is a dimension with previous level associations to one of the mapped dimensions.
3. RepBroker State and RepBroker Type are virtual dimensions, based on attributes of the mapped RepBroker dimension. Sales Director Town is a virtual dimension based on an attribute of Sales Director.
4. Ship-To Market is one of many dimensions that have a None designation, meaning import data cannot be derived from the import file, previous level relationship, or from a parent dimension's attribute. Therefore, all data will only show up for its default value.

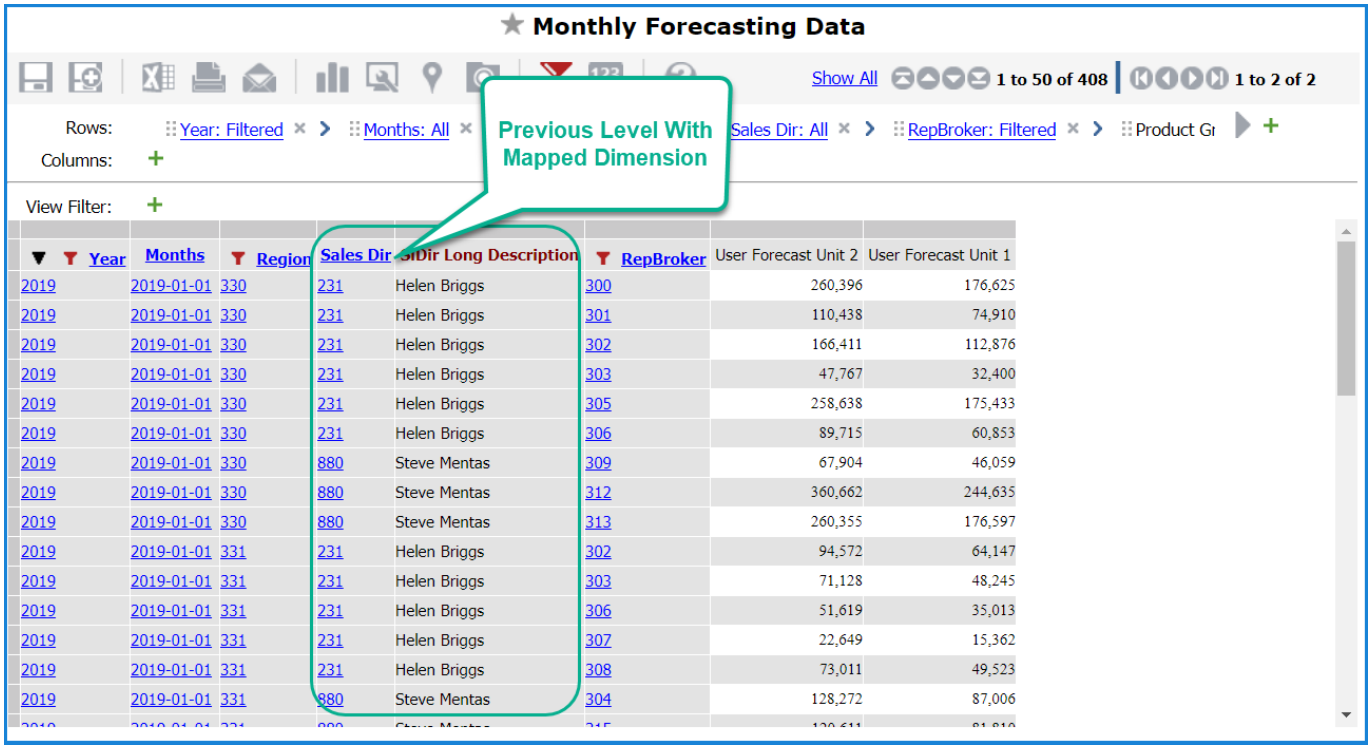
The last few images in this topic show you how imported data looks in Viewer views when the aforementioned dimensions are visible in the view.



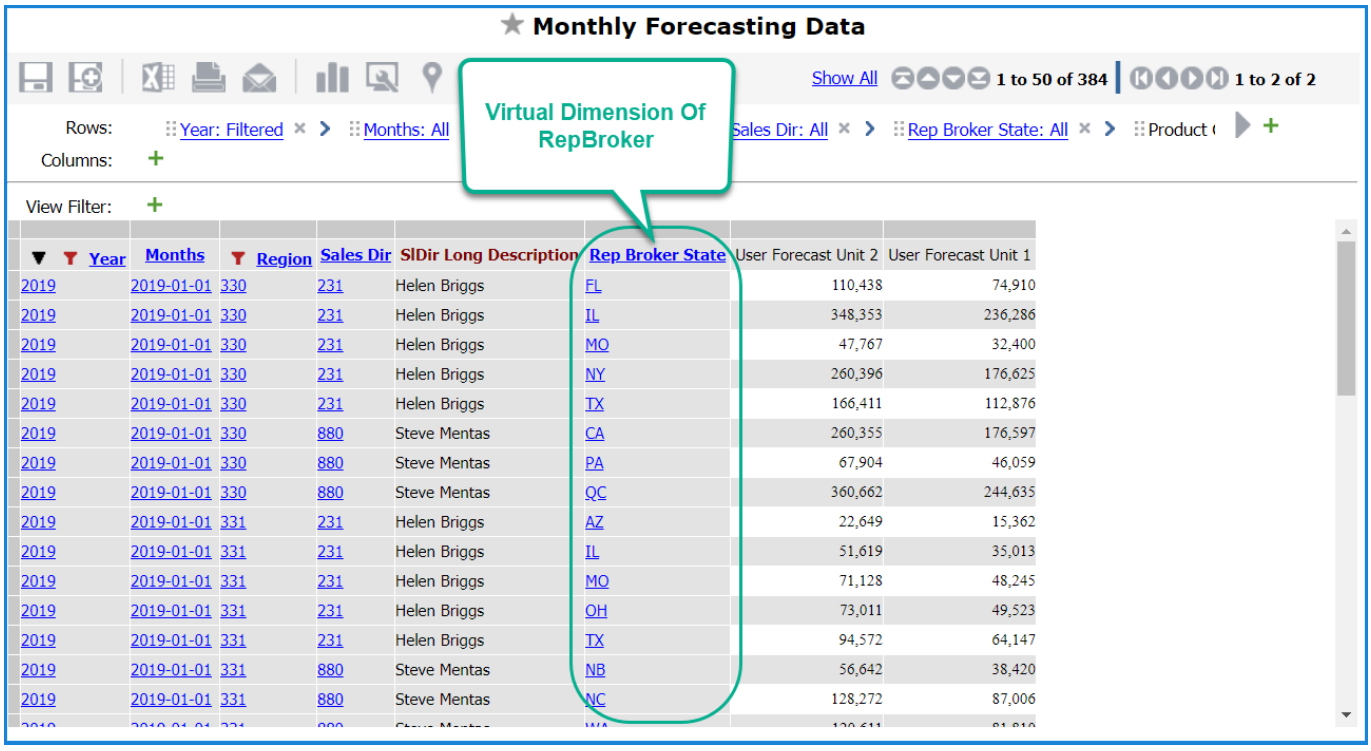
Here's the view when mapped dimensions are on display. The Region, RepBroker, Product Group and Product Brand data came from the import file.




Here's the view when the Sales Director dimension is on display. The Sales Director data was created from the Rep Broker | Sales Directory previous level information.

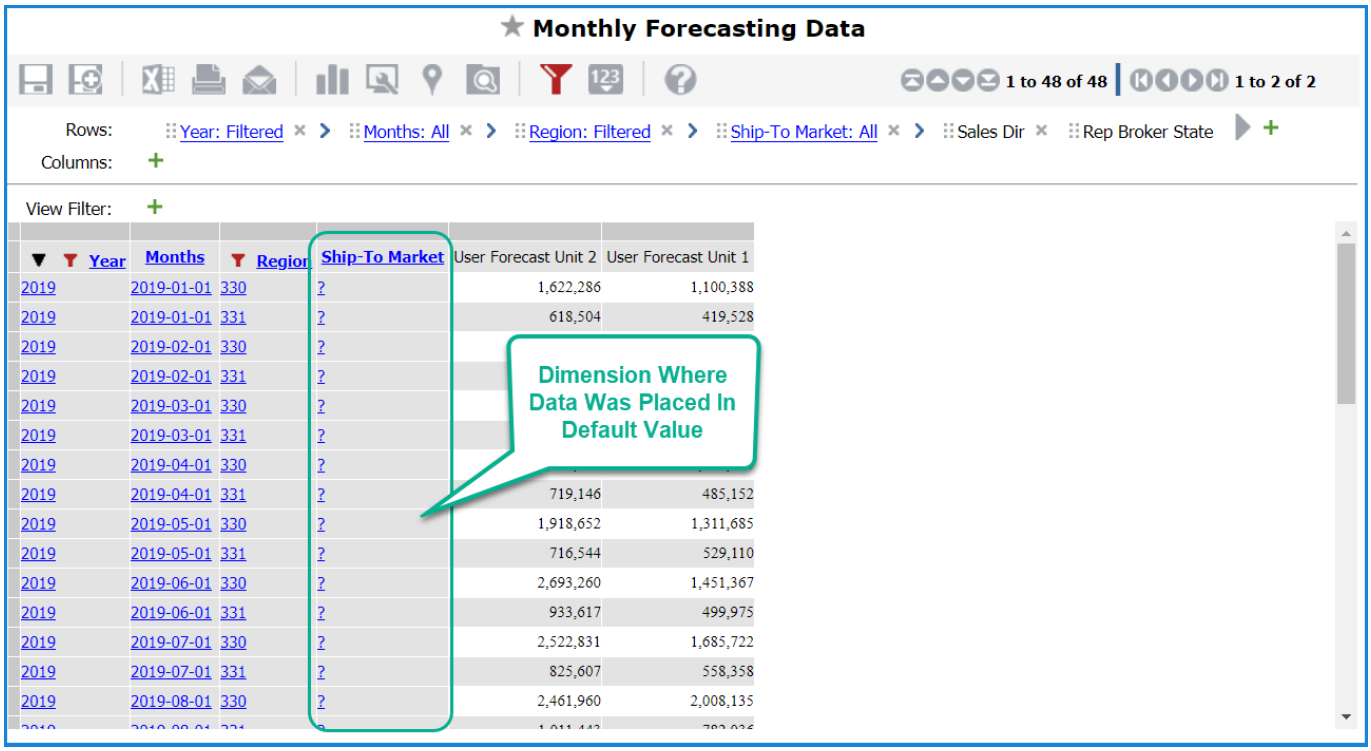


Here's the view adjusted to show the RepBroker State virtual dimension of the RepBroker mapped dimension. Rep Broker State data was created from the Rep Broker's State attribute.




| Year | Months | Region | Sales Dir | SlDir Long Description | Rep Broker State | User Forecast Unit 2 | User Forecast Unit 1 |
|---|---|---|---|---|---|---|---|
| 2019 | 2019-01-01 | 330 | 231 | Helen Briggs | FL | 110,438 | 74,910 |
| 2019 | 2019-01-01 | 330 | 231 | Helen Briggs | IL | 348,353 | 236,286 |
| 2019 | 2019-01-01 | 330 | 231 | Helen Briggs | MO | 47,767 | 32,400 |
| 2019 | 2019-01-01 | 330 | 231 | Helen Briggs | NY | 260,396 | 176,625 |
| 2019 | 2019-01-01 | 330 | 231 | Helen Briggs | TX | 166,411 | 112,876 |
| 2019 | 2019-01-01 | 330 | 880 | Steve Mentas | CA | 260,355 | 176,597 |
| 2019 | 2019-01-01 | 330 | 880 | Steve Mentas | PA | 67,904 | 46,059 |
| 2019 | 2019-01-01 | 330 | 880 | Steve Mentas | QC | 360,662 | 244,635 |
| 2019 | 2019-01-01 | 331 | 231 | Helen Briggs | AZ | 22,649 | 15,362 |
| 2019 | 2019-01-01 | 331 | 231 | Helen Briggs | IL | 51,619 | 35,013 |
| 2019 | 2019-01-01 | 331 | 231 | Helen Briggs | MO | 71,128 | 48,245 |
| 2019 | 2019-01-01 | 331 | 231 | Helen Briggs | OH | 73,011 | 49,523 |
| 2019 | 2019-01-01 | 331 | 231 | Helen Briggs | TX | 94,572 | 64,147 |
| 2019 | 2019-01-01 | 331 | 880 | Steve Mentas | NB | 56,642 | 38,420 |
| 2019 | 2019-01-01 | 331 | 880 | Steve Mentas | NC | 128,272 | 87,006 |

And here's a view with the Ship-To Market dimension on display in rows. That dimension wasn't in the import file and Data Import couldn't derive values from any previous level associations to other dimensions. Data only shows for the Ship-To Market's "?" default value.




| Year | Months | Region | Ship-To Market | User Forecast Unit 2 | User Forecast Unit 1 |
|---|---|---|---|---|---|
| 2019 | 2019-01-01 | 330 | ? | 1,622,286 | 1,100,388 |
| 2019 | 2019-01-01 | 331 | ? | 618,504 | 419,528 |
| 2019 | 2019-02-01 | 330 | ? | | |
| 2019 | 2019-02-01 | 331 | ? | | |
| 2019 | 2019-03-01 | 330 | ? | | |
| 2019 | 2019-03-01 | 331 | ? | | |
| 2019 | 2019-04-01 | 330 | ? | | |
| 2019 | 2019-04-01 | 331 | ? | 719,146 | 485,152 |
| 2019 | 2019-05-01 | 330 | ? | 1,918,652 | 1,311,685 |
| 2019 | 2019-05-01 | 331 | ? | 716,544 | 529,110 |
| 2019 | 2019-06-01 | 330 | ? | 2,693,260 | 1,451,367 |
| 2019 | 2019-06-01 | 331 | ? | 933,617 | 499,975 |
| 2019 | 2019-07-01 | 330 | ? | 2,522,831 | 1,685,722 |
| 2019 | 2019-07-01 | 331 | ? | 825,607 | 558,358 |
| 2019 | 2019-08-01 | 330 | ? | 2,461,960 | 2,008,135 |

## Can I Import Data Into More Than One Measure At a Time?

Yes, data can be imported into one or more measures that belong to the import's Target category. Here are two examples.

### *Example 1*

This example imports data into two different measures. The first Measure column is mapped to User POS Amt 4. The second is mapped to User POS Unit 4. The same import file contains both amounts and units. Each measure has its own dedicated column so it can be mapped separately. In imports like this where dates are in every row, measures can only be mapped to one column each.

**Data Mapping**

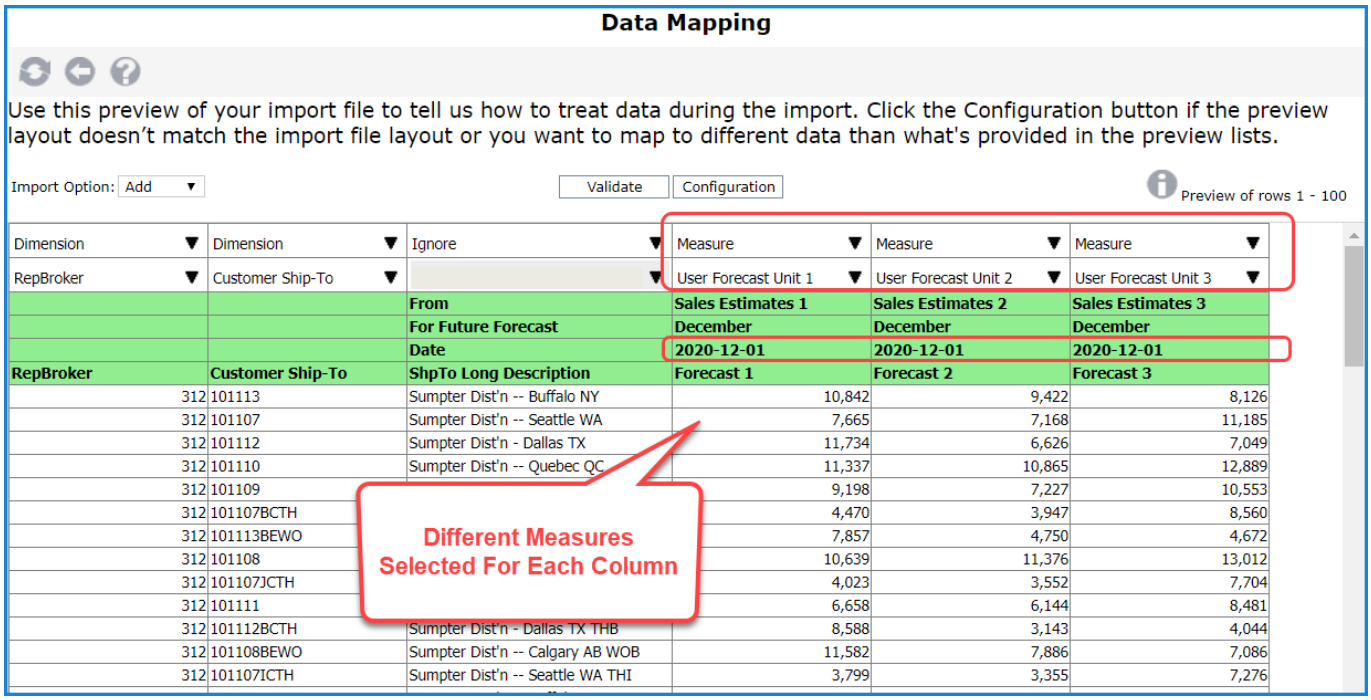
Use this preview of your import file to tell us how to treat data during the import. Click the Configuration button if the preview layout doesn't match the import file layout or you want to map to different data than what's provided in the preview lists.

Import Option: Add | Validate | Configuration | Preview of rows 1 - 100

| Date | Dimension | Dimension | Ignore | Measure | Measure | Ignore |
|---|---|---|---|---|---|---|
| yyyy-mm-dd | Ship-To Region | Ship-To Territory | | User POS Amt 4 | User POS Unit 4 | |
| **Weeks** | **Ship-To Region** | **Ship-To Territory** | **STerr Long Description** | **User POS Amt 4** | **User POS Unit 4** | **Budgeted Sales** |
| 2018-12-30 | 50 | 1104 | New England | $26,953.82 | 3,967 | |
| 2018-12-30 | 50 | 1105 | Great Lakes | $3,837.75 | 514 | |
| 2018-12-30 | 51 | 1102 | Gulf Coast | $12,390.15 | 1,754 | |
| 2018-12-30 | 51 | 1103 | Midlantic | $13,368.23 | 1,975 | |
| 2018-12-30 | 52 | 1101 | South Central | $20,815.49 | 3,075 | |
| 2018-12-30 | 52 | 1106 | Great Plains | $13,455.90 | 1,985 | |
| 2018-12-30 | 53 | 1100 | Southwest | $9,286.27 | 1,200 | |
| 2018-12-30 | 53 | 1107 | Northwest | $8,770.70 | 1,208 | |
| 2018-12-30 | 54 | 1111 | Eastern Atlantic Provinces | $21,853.91 | 3,188 | |
| 2018-12-30 | 55 | 1108 | Western Provinces | $10,024.02 | 1,509 | |
| 2018-12-30 | 55 | 1109 | Central Provinces | $12,993.77 | 1,765 | |
| 2019-01-06 | 50 | 1104 | New England | $42,047.96 | 3,967 | |
| 2019-01-06 | 50 | 1105 | Great Lakes | $5,986.89 | 514 | |
| 2019-01-06 | 51 | 1102 | Gulf Coast | $19,328.63 | 1,754 | |
| 2019-01-06 | 51 | 1103 | Midlantic | $20,854.44 | 1,975 | |
| 2019-01-06 | 52 | 1101 | South Central | $32,472.16 | 3,075 | |

### *Example 2*

This example imports data into a few different User Forecast measures. A different measure is selected for each column. This import helps the user create a few different forecasting scenarios they're considering for the same time period of December 2020. Each measure/date mapping combination must be a unique combination in imports like this where dates are in a header row.



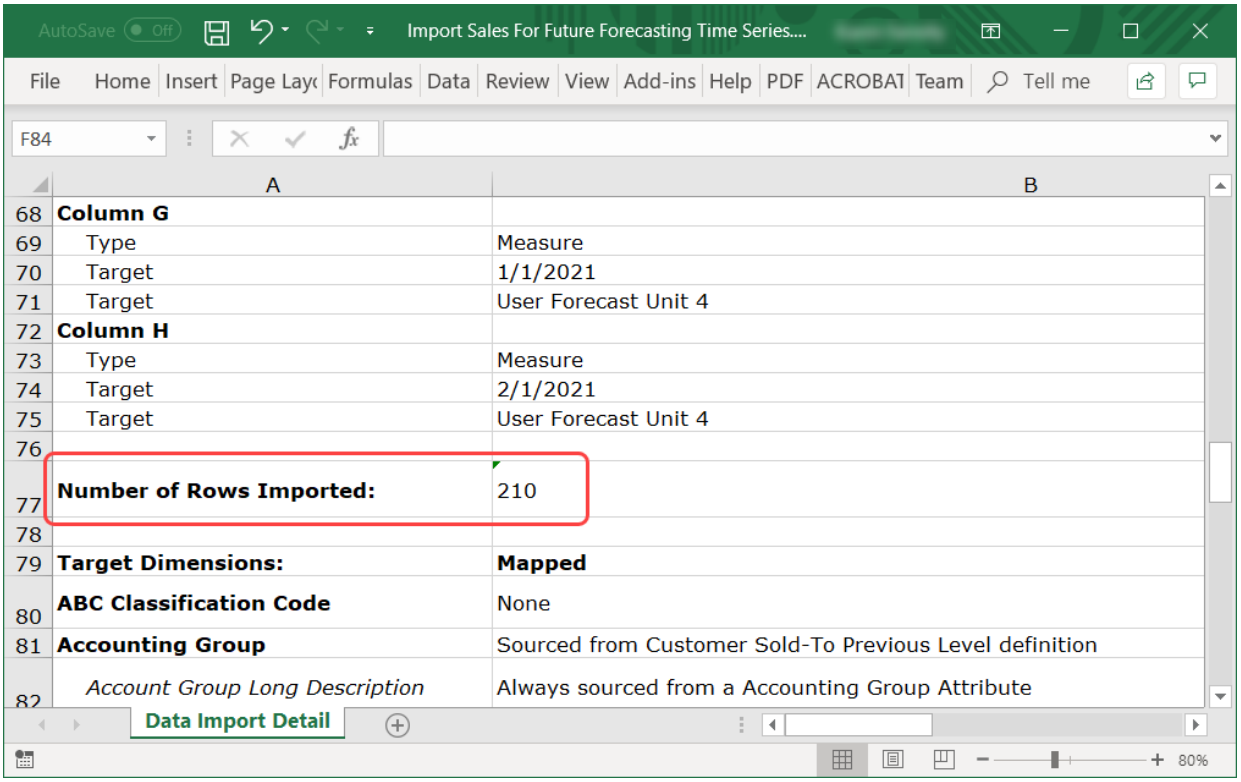

| Dimension | Dimension | Ignore | Measure | Measure | Measure |
|---|---|---|---|---|---|
| RepBroker | Customer Ship-To | | User Forecast Unit 1 | User Forecast Unit 2 | User Forecast Unit 3 |
| | | From | Sales Estimates 1 | Sales Estimates 2 | Sales Estimates 3 |
| | | For Future Forecast | December | December | December |
| | | Date | 2020-12-01 | 2020-12-01 | 2020-12-01 |
| RepBroker | Customer Ship-To | ShpTo Long Description | Forecast 1 | Forecast 2 | Forecast 3 |
| 312 | 101113 | Sumpter Dist'n -- Buffalo NY | 10,842 | 9,422 | 8,126 |
| 312 | 101107 | Sumpter Dist'n -- Seattle WA | 7,665 | 7,168 | 11,185 |
| 312 | 101112 | Sumpter Dist'n - Dallas TX | 11,734 | 6,626 | 7,049 |
| 312 | 101110 | Sumpter Dist'n -- Quebec QC | 11,337 | 10,865 | 12,889 |
| 312 | 101109 | | 9,198 | 7,227 | 10,553 |
| 312 | 101107BCTH | | 4,470 | 3,947 | 8,560 |
| 312 | 101113BEWO | | 7,857 | 4,750 | 4,672 |
| 312 | 101108 | | 10,639 | 11,376 | 13,012 |
| 312 | 101107JCTH | | 4,023 | 3,552 | 7,704 |
| 312 | 101111 | | 6,658 | 6,144 | 8,481 |
| 312 | 101112BCTH | Sumpter Dist'n - Dallas TX THB | 8,588 | 3,143 | 4,044 |
| 312 | 101108BEWO | Sumpter Dist'n -- Calgary AB WOB | 11,582 | 7,886 | 7,086 |
| 312 | 101107ICTH | Sumpter Dist'n -- Seattle WA THI | 3,799 | 3,355 | 7,276 |

## How Many Rows From My Import File Got Imported?

Look at an import's processing report to find out how many rows of data got imported. Here's how to open a report.

1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.
2. In the Data Import List window, select the Data Import.
3. Click See Processing Details For A Data Import  .
4. When the report downloads, open it and scroll to the Number of Rows Imported section.

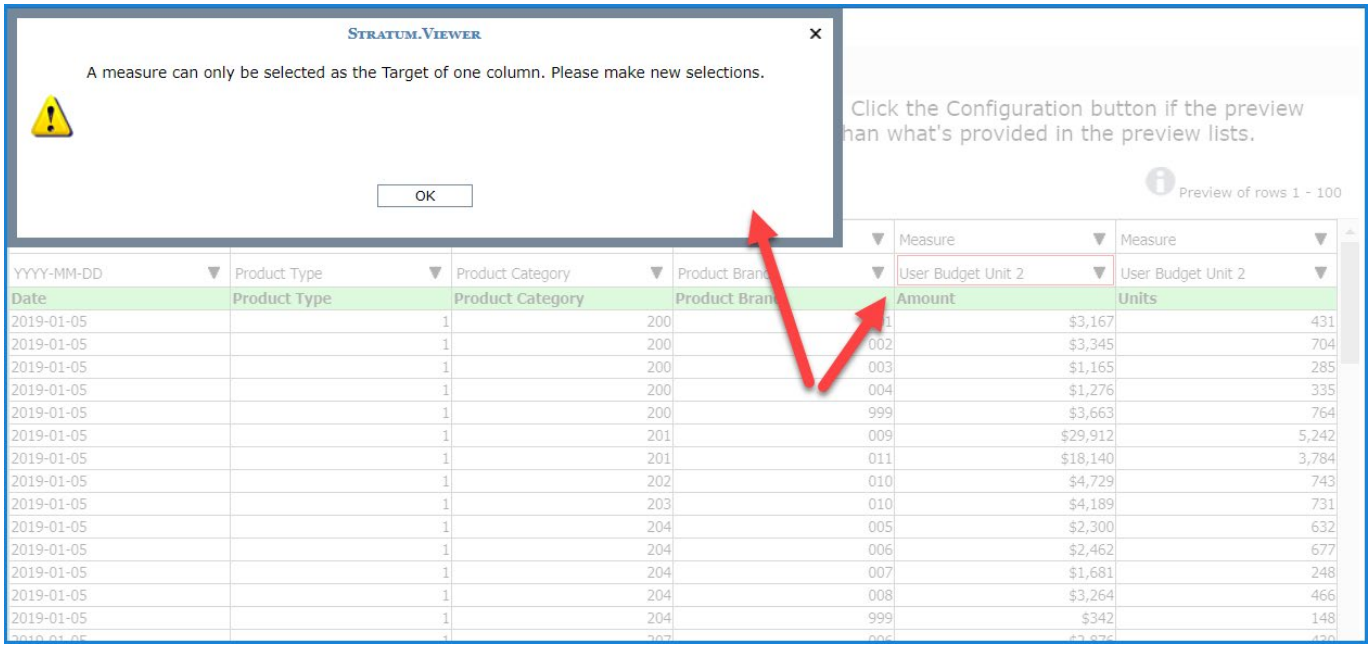



## What Does a "Measure Can Be Only Selected as the Target of One Column" Message Mean?

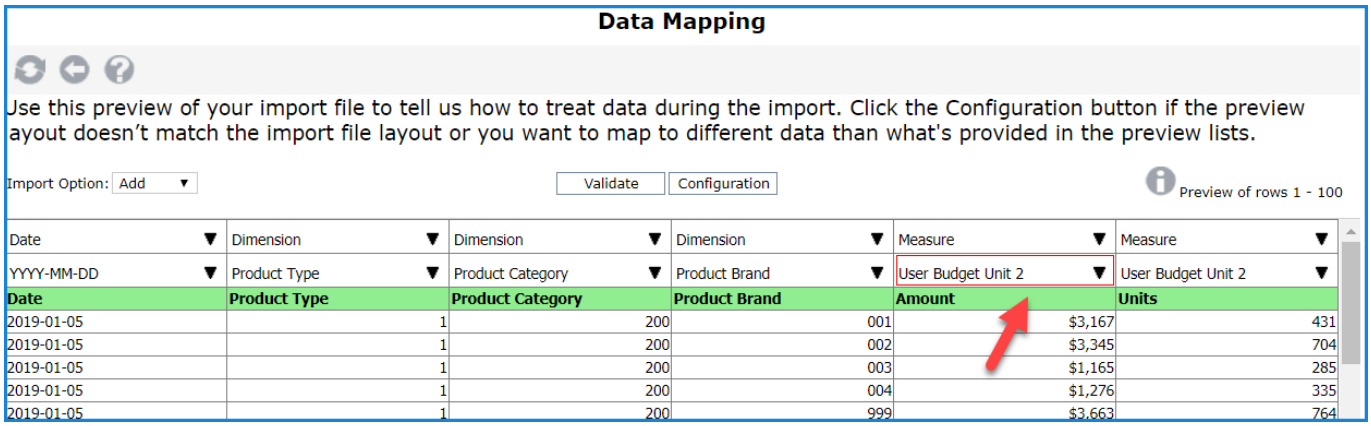
That means more than one column has been mapped to the same measure. In import files where dates are in every row, each measure needs its own dedicated column.

Adjust your mapping selections so each measure is mapped to a single column in the mapping window. You may need to cancel your import and adjust the import file so each set of measure values is in its own column and not spread across multiple columns.

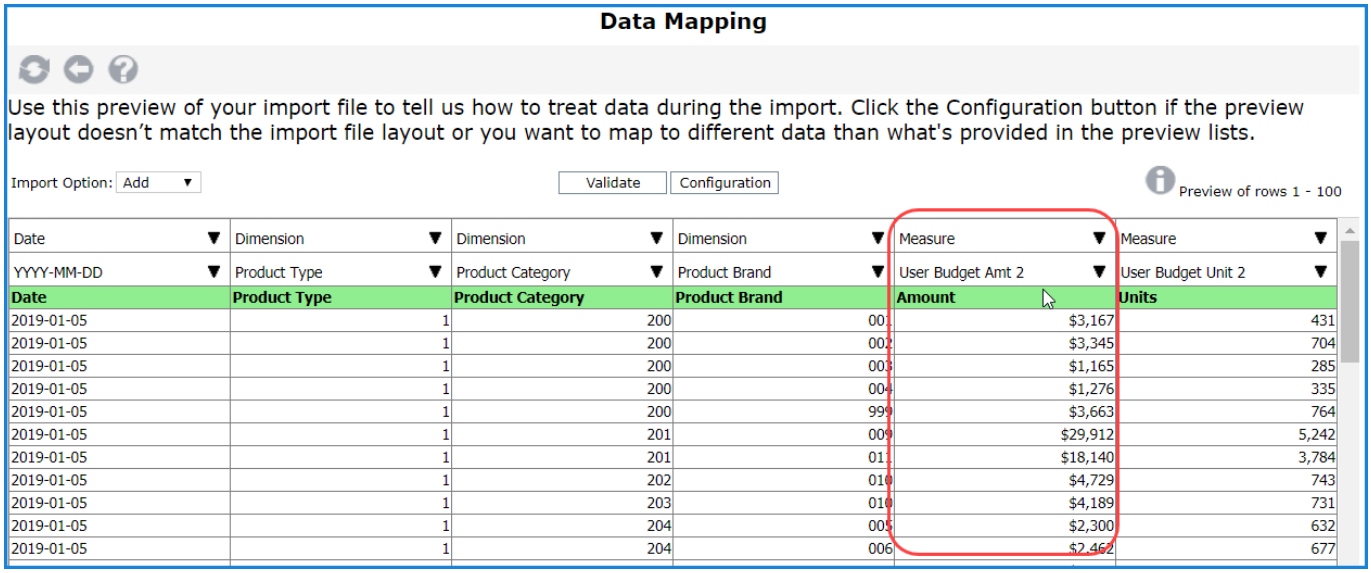
In the following example, two columns were mapped to User Budget Unit 2. Changing one of the column mappings to a different measure will correct the issue.



Closing the message shows one of the impacted columns highlighted in red. The column is changed to User Budget Amt 2, as shown in the last image.




After the change, the import mapping is valid and the import can be processed.

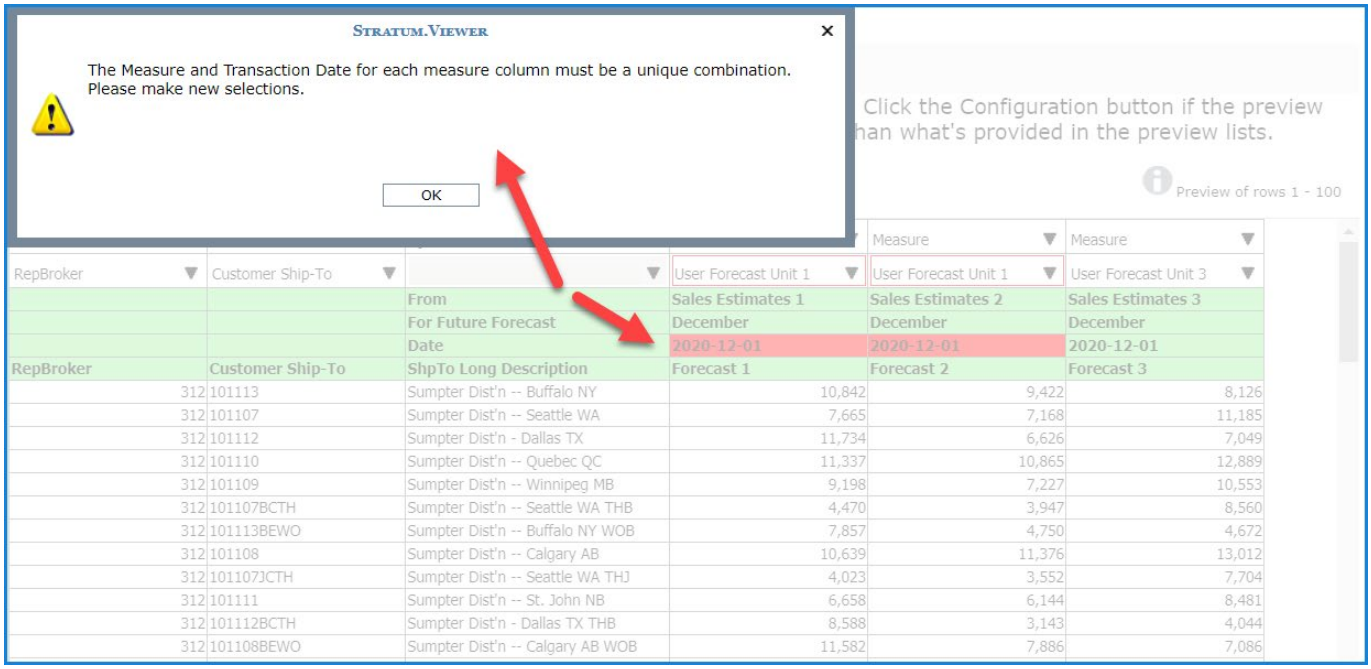



## What Does "The Measure and Transaction Date for Each Measure Column Must Be a Unique Combination" Message Mean?

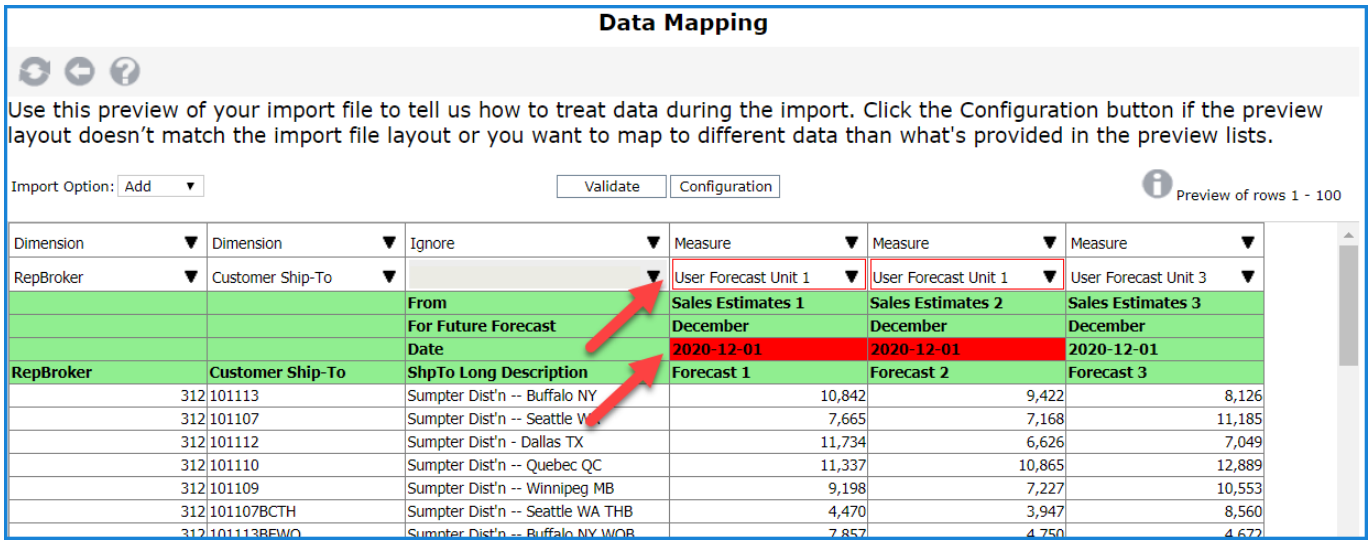
That means the same measure has been mapped to multiple columns with the same date. In imports where time is in a header row, it's okay if multiple columns have the same date but each column must be mapped to a unique measure. Each measure/date column combination must be unique in this type of import.

Adjust your mapping selections to create unique measure/date combinations in the mapping window. You may need to cancel your import and adjust the import file, for example, adjust dates in the header row or combine columns that had data for the same measure/date instances into one column.

In the following example, User Forecast Unit 1 is mapped to two columns with the same date of 2020-12-01. Changing one of the column mappings to a different measure will correct the issue.




Closing the message shows the impacted measures and dates highlighted in red. The second column is changed to User Forecast Unit 2, as shown in the last image.



After the change, the import mapping is valid and the import can be processed.

**Data Mapping**

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.

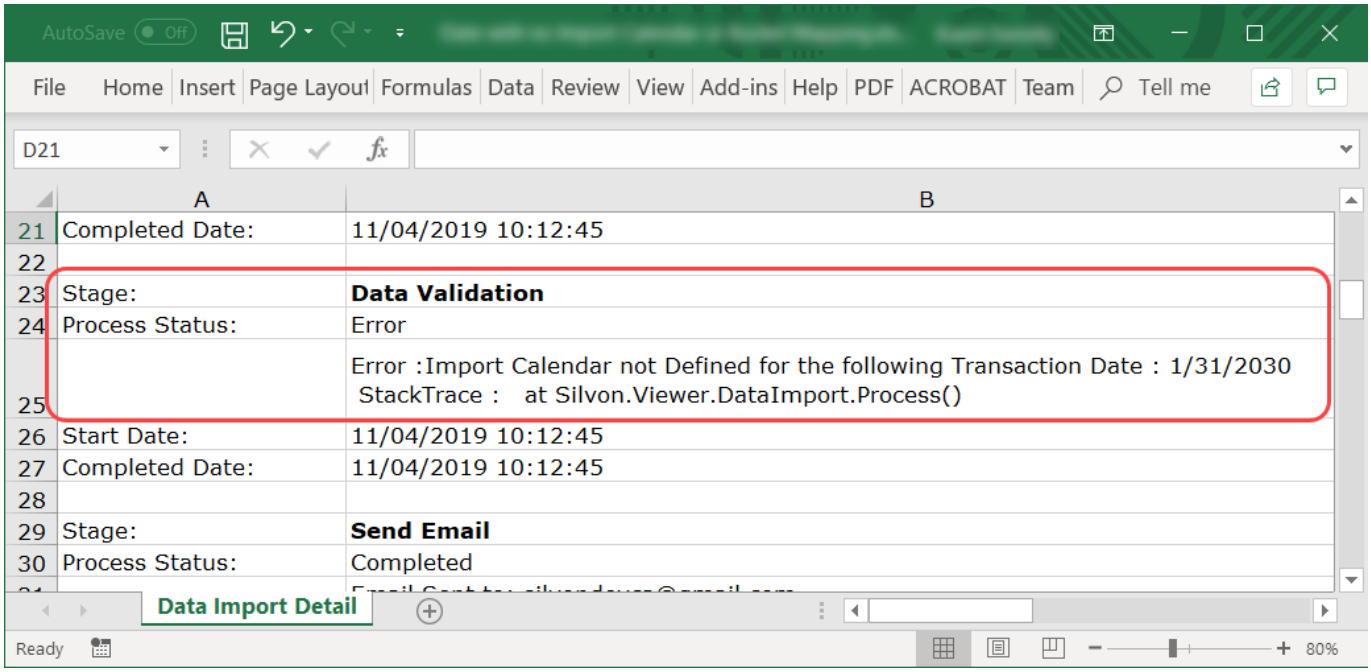
Import Option: Add | Validate | Configuration | Preview of rows 1 - 100

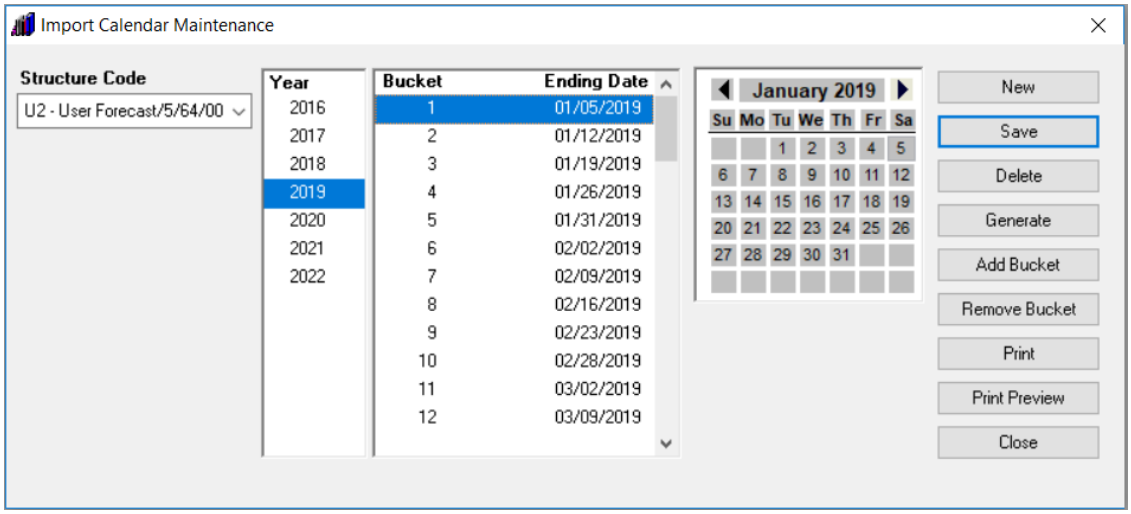
| Dimension | Dimension | Ignore | Measure | Measure | Measure |
|---|---|---|---|---|---|
| RepBroker | Customer Ship-To | | User Forecast Unit 1 | User Forecast Unit 2 | User Forecast Unit 3 |
| | | From | Sales Estimates 1 | Sales Estimates 2 | Sales Estimates 3 |
| | | For Future Forecast | December | December | December |
| | | Date | 2020-12-01 | 2020-12-01 | 2020-12-01 |
| RepBroker | Customer Ship-To | ShpTo Long Description | Forecast 1 | Forecast 2 | Forecast 3 |
| 312 | 101113 | Sumpter Dist'n -- Buffalo NY | 10,842 | 9,422 | 8,126 |
| 312 | 101107 | Sumpter Dist'n -- Seattle WA | 7,665 | 7,168 | 11,185 |
| 312 | 101112 | Sumpter Dist'n - Dallas TX | 11,734 | 6,626 | 7,049 |
| 312 | 101110 | Sumpter Dist'n -- Quebec QC | 11,337 | 10,865 | 12,889 |
| 312 | 101109 | Sumpter Dist'n -- Winnipeg MB | 9,198 | 7,227 | 10,553 |
| 312 | 101107BCTH | Sumpter Dist'n -- Seattle WA THB | 4,470 | 3,947 | 8,560 |
| 312 | 101113BEWO | Sumpter Dist'n -- Buffalo NY WOB | 7,857 | 4,750 | 4,672 |
| 312 | 101108 | Sumpter Dist'n -- Calgary AB | 10,639 | 11,376 | 13,012 |
| 312 | 101107JCTH | Sumpter Dist'n -- Seattle WA THJ | 4,023 | 3,552 | 7,704 |
| 312 | 101111 | Sumpter Dist'n -- St. John NB | 6,658 | 6,144 | 8,481 |
| 312 | 101112BCTH | Sumpter Dist'n - Dallas TX THB | 8,588 | 3,143 | 4,044 |
| 312 | 101108BEWO | Sumpter Dist'n -- Calgary AB WOB | 11,582 | 7,866 | 7,086 |

## What Does an "Import Calendar Not Defined" Processing Error Mean?

Did you import fail with a message such as the one shown below – about an "Import Calendar not Defined for the following Transaction Date"? That means the date listed in the error message is in your import file but doesn't have the required calendar definitions in Stratum. Your file might have a date far out in the future – and import calendar definitions in Stratum Admin may not have years and related bucket mappings set up for that year.

In the example below, a date in the import file has a year of 2030 but doesn't have the required calendar definitions in Stratum. See the second image which shows calendars were defined for 2016 through 2022. What can you do if you see this type of error message? First, review your import file and adjust it to exclude the date(s) in question. If you didn't intend for them to be part of the import. If you intended for them to be part of the import, you will need to contact your Stratum and Viewer Administrator to discuss the year(s) of data needed for your implementation. They will need to verify that appropriate import calendars and ViewGroup bucket mappings are defined in Stratum.

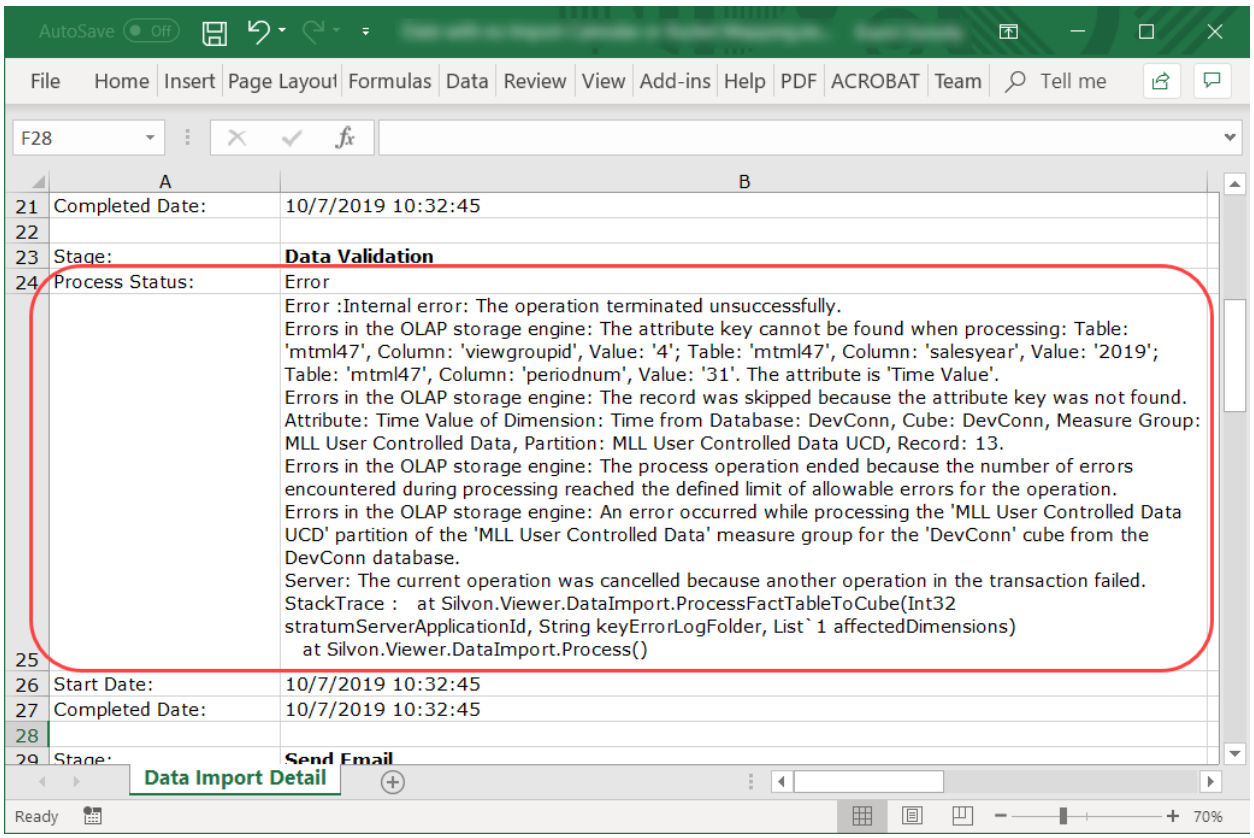





## What Does an "OLAP Storage Engine Attribute Key Cannot Be Found" Processing Error Mean?

Did your Data Import fail with a message about missing Storage Engine Attribute Keys? That can happen if there aren't proper Stratum Admin ViewGroup bucket mappings defined for the periods of time applicable to the data you are trying to import. Mappings define start and end dates for periods of time such as months or weeks associated with Stratum calendar years. Mappings are used by Viewer to determine the year and period associated with each transaction date (Year|Bucket). If a bucket mapping is not found for a transaction date (Year|Bucket), then your Data Import will fail.

The message shown in the next image is from a failed data import's processing report. It's an example of a bucket mapping error. If one of your imports fails with this type of error, notify your Stratum and Viewer Administrators and share the processing report with them. They will need to verify that appropriate bucket mappings have been defined in Stratum for the ViewGroup associated with the Target category for your import.



## What Happens If I Change A Category From User Controlled To Corporate Controlled?

Changing a category that your company has already designated as User controlled to Corporate controlled is not recommended. When administrators set up Data Import, they determine ahead of time which categories will be dedicated to use with Data Import. Once users begin importing to those categories, their designation in Category maintenance should remain at User controlled. If someone were to change a category from User to Corporate controlled, previously imported data would no longer be accessible from Viewer or other Stratum applications and users would no longer be able to import data into the impacted category.

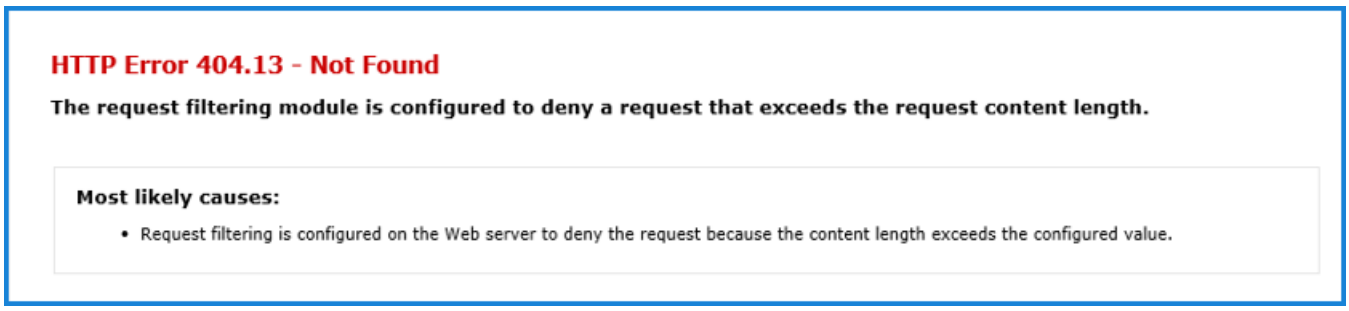
## What Happens If I Delete A Data Import That's Been Processed?

The definition for the import and its processing report will be deleted. The data that got imported when the import was processed remains in Stratum for you to use.

## What Should I Do If An Import File Size Exceeds Maximum Allowed Size?

An "HTTP Error 404.13 – Not Found" technical message from your browser like the one shown below means that the size of your import file exceeds the maximum allowed file size. Files around the 28MB size or higher may result in this message and stop an import file upload. The message will tell you the "module is configured to deny a request that exceeds the request content length".

A work around for this scenario is to split up your import into multiple, smaller files each with less rows and/or columns of data. Divide the data up into smaller files and import each file separately.

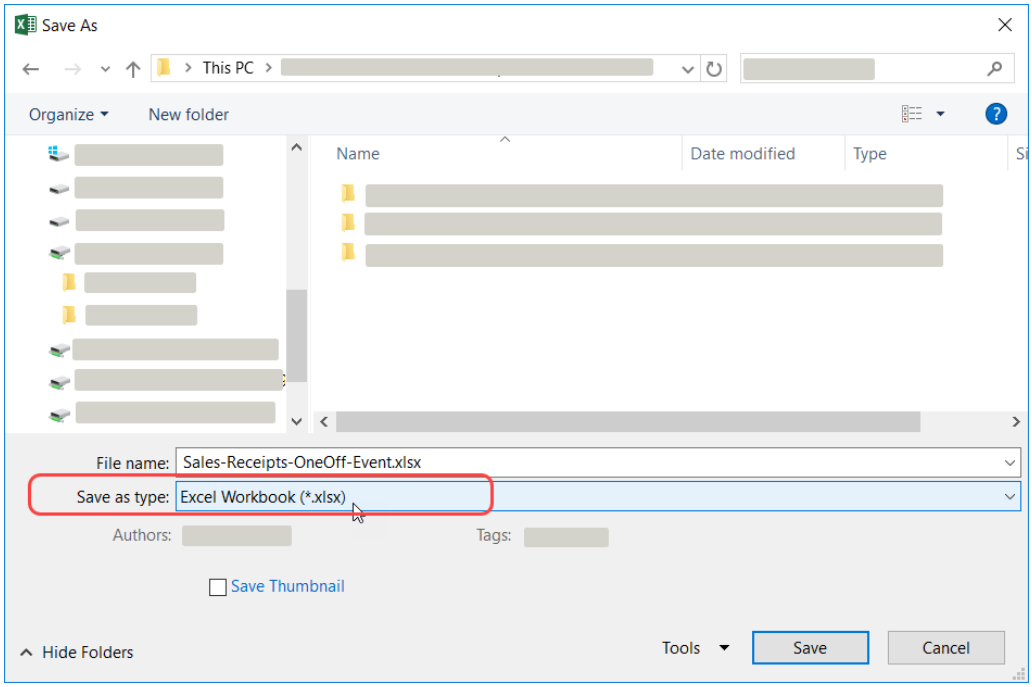



## Why Can't I Delete A Data Import?

Data Import definitions can only be deleted if they have a status of Completed or Error. An import that has a status of In Process cannot be deleted because Data Import is actively working with the import definition and import file.

## Why Are Dates or Times Not Showing in the Expected Format in a Data Mapping Preview?

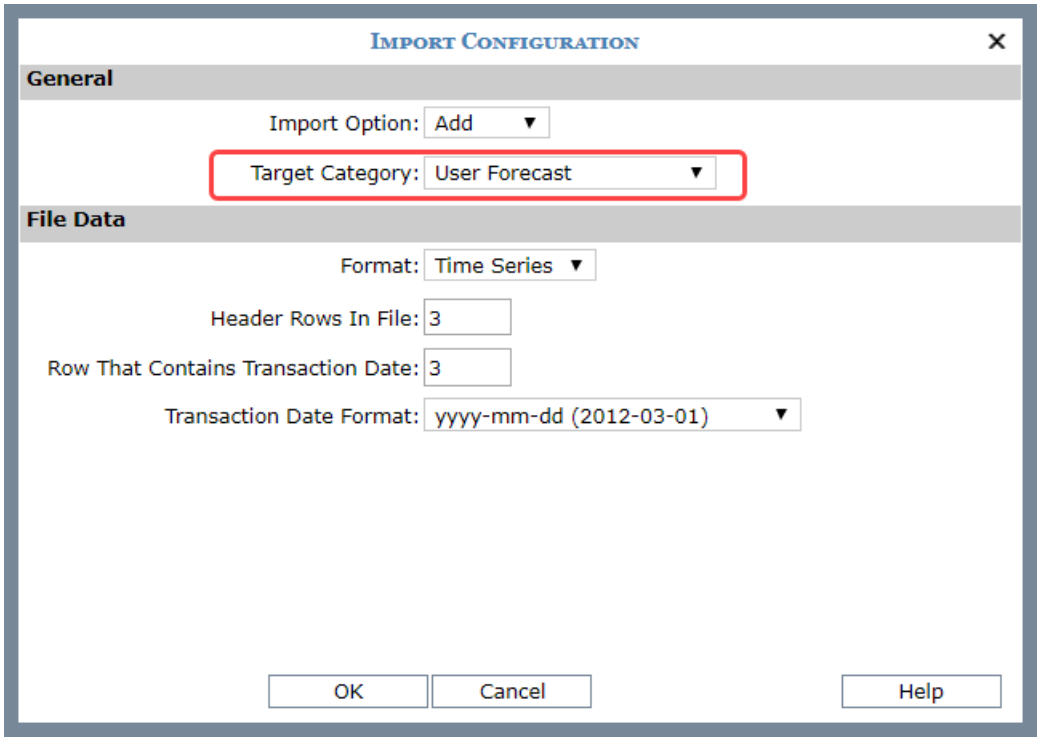
If you upload an import file and something looks off with the display of dates or times in the Data Mapping window preview, check the format of the import file. Your files need to be saved as Excel Workbooks when you set them up in Excel. If you saved it in another format such as Strict Open XML Spreadsheet, that could cause issues with dates and times. Try your import again after saving it as the Excel Workbook type in Excel.

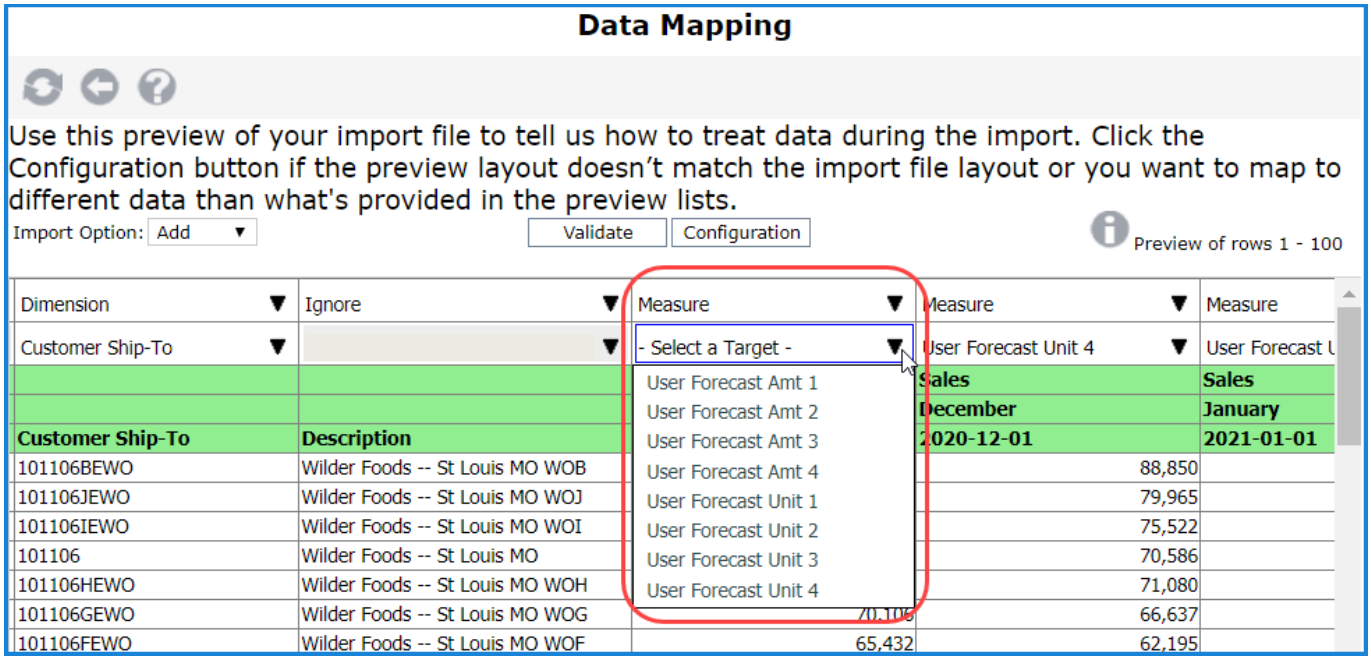


## Why Aren't Some Measures Showing as Options When I Map Data for an Import?

The category you select as the Target for a Data Import controls which measures are available once you are previewing and mapping data in the Data Mapping window. Only the measures belonging to the Target category will show in the Select a Target drop-down list for columns of data you set to be Measures in the mapping window.

In this example, User Forecast is the Target category. That means, only the measures belonging to that category are the measures you can choose from when mapping data for this import.



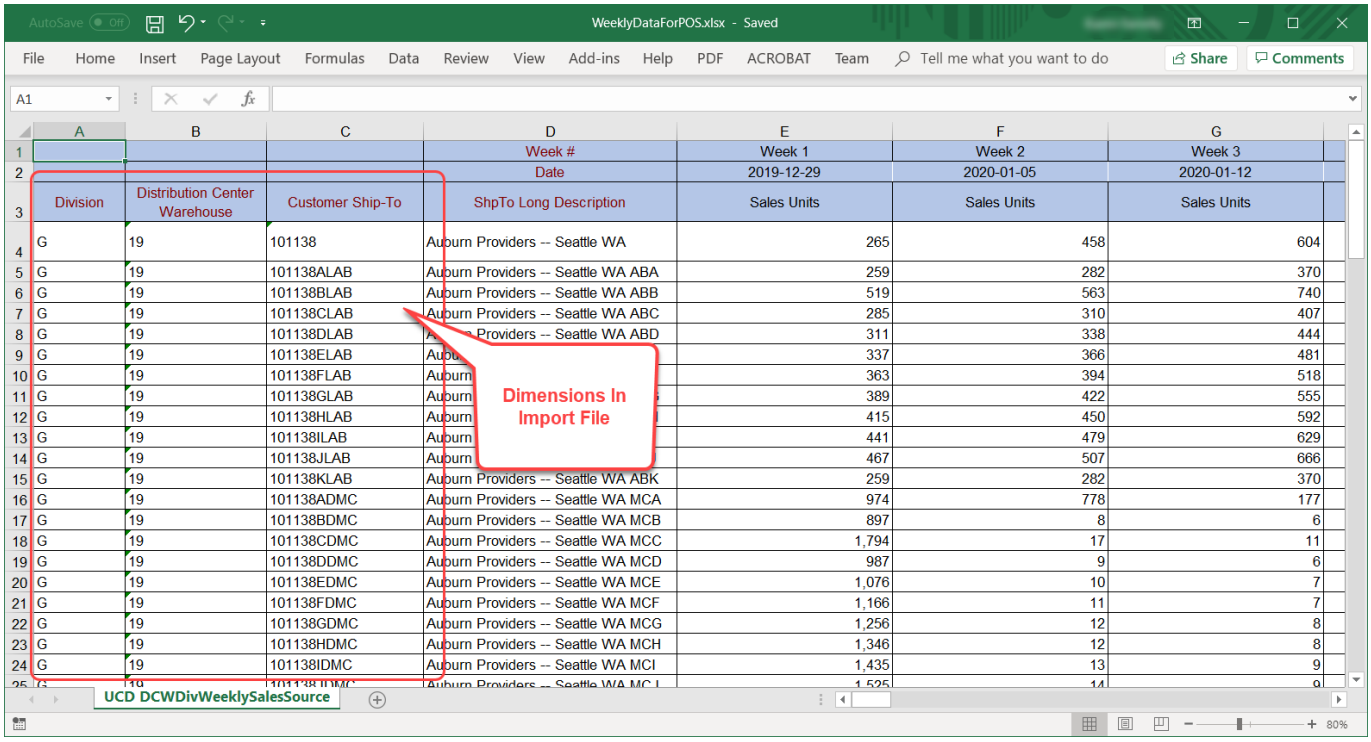
## Why Did Import Data Get Added To A Dimension's Default Value '?' Member?

If you see imported data in a dimension's default value*, that's an indicator that the dimension wasn't included in your import file **or** that it could not be sourced from previous level data. One option for avoiding these cases is to include the dimension in your import file and map it. More details are provided in the examples that follow.

***Note:** The "?" character is usually used to represent a dimension's default value.

### *Example 1: Dimension Wasn't In Import File*

Here's an example where the only values that got populated for a dimension are its default values. This happens when the dimension wasn't included in the import file and it couldn't be sourced from previous level data. First, here's the import file showing three dimensions that will get mapped to during the import setup.




| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | | | | Week # | Week 1 | Week 2 | Week 3 |
| 2 | | | | Date | 2019-12-29 | 2020-01-05 | 2020-01-12 |
| 3 | Division | Distribution Center Warehouse | Customer Ship-To | ShpTo Long Description | Sales Units | Sales Units | Sales Units |
| 4 | G | 19 | 101138 | Auburn Providers -- Seattle WA | 265 | 458 | 604 |
| 5 | G | 19 | 101138ALAB | Auburn Providers -- Seattle WA ABA | 259 | 282 | 370 |
| 6 | G | 19 | 101138BLAB | Auburn Providers -- Seattle WA ABB | 519 | 563 | 740 |
| 7 | G | 19 | 101138CLAB | Auburn Providers -- Seattle WA ABC | 285 | 310 | 407 |
| 8 | G | 19 | 101138DLAB | Auburn Providers -- Seattle WA ABD | 311 | 338 | 444 |
| 9 | G | 19 | 101138ELAB | Auburn | 337 | 366 | 481 |
| 10 | G | 19 | 101138FLAB | Auburn | 363 | 394 | 518 |
| 11 | G | 19 | 101138GLAB | Auburn | 389 | 422 | 555 |
| 12 | G | 19 | 101138HLAB | Auburn | 415 | 450 | 592 |
| 13 | G | 19 | 101138ILAB | Auburn | 441 | 479 | 629 |
| 14 | G | 19 | 101138JLAB | Auburn | 467 | 507 | 666 |
| 15 | G | 19 | 101138KLAB | Auburn Providers -- Seattle WA ABK | 259 | 282 | 370 |
| 16 | G | 19 | 101138ADMC | Auburn Providers -- Seattle WA MCA | 974 | 778 | 177 |
| 17 | G | 19 | 101138BDMC | Auburn Providers -- Seattle WA MCB | 897 | 8 | 6 |
| 18 | G | 19 | 101138CDMC | Auburn Providers -- Seattle WA MCC | 1,794 | 17 | 11 |
| 19 | G | 19 | 101138DDMC | Auburn Providers -- Seattle WA MCD | 987 | 9 | 6 |
| 20 | G | 19 | 101138EDMC | Auburn Providers -- Seattle WA MCE | 1,076 | 10 | 7 |
| 21 | G | 19 | 101138FDMC | Auburn Providers -- Seattle WA MCF | 1,166 | 11 | 7 |
| 22 | G | 19 | 101138GDMC | Auburn Providers -- Seattle WA MCG | 1,256 | 12 | 8 |
| 23 | G | 19 | 101138HDMC | Auburn Providers -- Seattle WA MCH | 1,346 | 12 | 8 |
| 24 | G | 19 | 101138IDMC | Auburn Providers -- Seattle WA MCI | 1,435 | 13 | 9 |

Here's the dimension mapping that was done when the import was set up.

**Data Mapping**

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: Replace ▼ Validate Configuration Preview of rows 1 - 100

| Dimension ▼ | Dimension ▼ | Dimension ▼ | Ignore ▼ | Measure ▼ | Measure ▼ |
|---|---|---|---|---|---|
| Division ▼ | Distribution Center Warehouse ▼ | Customer Ship-To ▼ | ▼ | User Budget Unit 1 ▼ | User Budget Unit 1 ▼ |
| | | | Week # | Week 1 | Week 2 |
| | | | D | 2019-12-29 | 2020-01-05 |
| Division | Distribution Center Warehouse | Customer Ship-To | Ship | ales Units | Sales Units |
| G | 19 | 101138 | Auburn | 265 | 458 |
| G | 19 | 101138ALAB | Auburn | 259 | 282 |
| G | 19 | 101138BLAB | Auburn | 519 | 563 |
| G | 19 | 101138CLAB | Auburn | 285 | 310 |
| G | 19 | 101138DLAB | Auburn | 311 | 338 |
| G | 19 | 101138ELAB | Auburn Providers -- Seattle WA ABE | 337 | 366 |
| G | 19 | 101138FLAB | Auburn Providers -- Seattle WA ABF | 363 | 394 |
| G | 19 | 101138GLAB | Auburn Providers -- Seattle WA ABG | 389 | 422 |
| G | 19 | 101138HLAB | Auburn Providers -- Seattle WA ABH | 415 | 450 |
| G | 19 | 101138ILAB | Auburn Providers -- Seattle WA ABI | 441 | 479 |
| G | 19 | 101138JLAB | Auburn Providers -- Seattle WA ABJ | 467 | 507 |
| G | 19 | 101138KLAB | Auburn Providers -- Seattle WA ABK | 259 | 282 |
| G | 19 | 101138ADMC | Auburn Providers -- Seattle WA MCA | 974 | 778 |

Mapped Dimensions

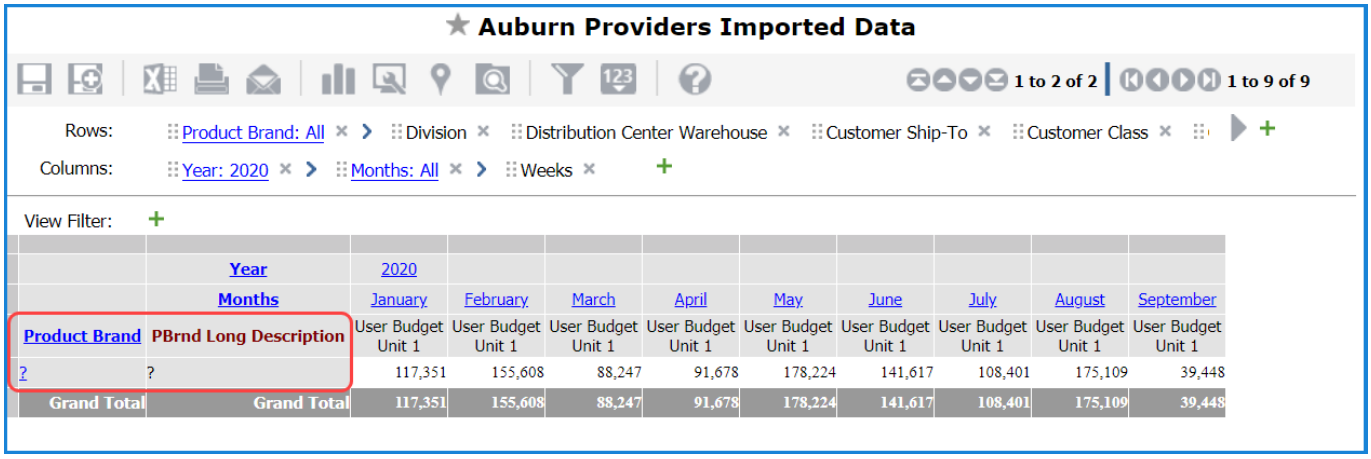
Here's part of the Data Mapping section from the import's processing report, showing the three mapped dimensions. Import data goes directly to them, so a description of **"Import File"** shows up next to them. Dimensions with **"None"** listed next to them are the ones for which imported data will only show up in their default value because they weren't part of the import file.

| | Target Dimensions: | Mapped |
|---|---|---|
| 219 | **ABC Classification** | None |
| 220 | **Accounting Group** | Sourced from Customer Sold-To Previous Level definition |
| 221 | *Account Group* | Always sourced from a Accounting Group Attribute |
| 222 | **Buyer** | None |
| 223 | **Commodity Code** | None |
| 224 | **Company** | Sourced from Division Previous Level definition |
| 225 | **Currency** | None |
| 226 | **Customer Class** | Sourced from Customer Sold-To Previous Level definition |
| 227 | **Customer Parent** | Sourced from Customer Sold-To Previous Level definition |
| 228 | **Customer Priority** | Sourced from Customer Sold-To Previous Level definition |
| 229 | **Customer Ship-To** | Import File |
| 230 | *Customer Ship-To* | Always sourced from a Customer Ship-To Attribute |
| 231 | *Customer Ship-To* | Always sourced from a Customer Ship-To Attribute |
| 232 | *Customer Ship-To* | Always sourced from a Customer Ship-To Attribute |
| 233 | *Ship-To State* | Always sourced from a Customer Ship-To Attribute |
| 234 | **Customer SIC Code** | Sourced from Customer Sold-To Previous Level definition |
| 235 | **Customer Sold-To** | Sourced from Customer Ship-To Previous Level definition |
| 236 | **Customer Type** | Sourced from Customer Sold-To Previous Level definition |
| 237 | **Distribution Center** | Import File |
| 238 | *Distribution Center Warehouse State* | Always sourced from a Distribution Center Warehouse Attribute |
| 239 | **Distribution Channel** | None |
| 240 | **Division** | Import File |
| 241 | *Division City* | Always sourced from a Division Attribute |
| 242 | **Lot** | None |

Product Brand is an example of a dimension that has None listed for it. Here's its detail in the processing report.

| | |
|---|---|
| **Product** | None |
| *Product ABC Class* | None |
| *Product Commodity* | None |
| *Product Primary* | None |
| *Product Primary* | None |
| *Product Purchasing* | None |
| **Product Brand** | None |
| **Product Category** | None |
| **Product Category** | None |
| **Product Class** | None |
| **Product Family** | None |
| **Product Group** | None |
| **Product SubClass** | None |

Here's a view with Product Brand in it along with the import's target measure of User Budget Units 1. Import data got placed only in Product Brand's default value.



**Auburn Providers Imported Data**

1 to 2 of 2 | 1 to 9 of 9

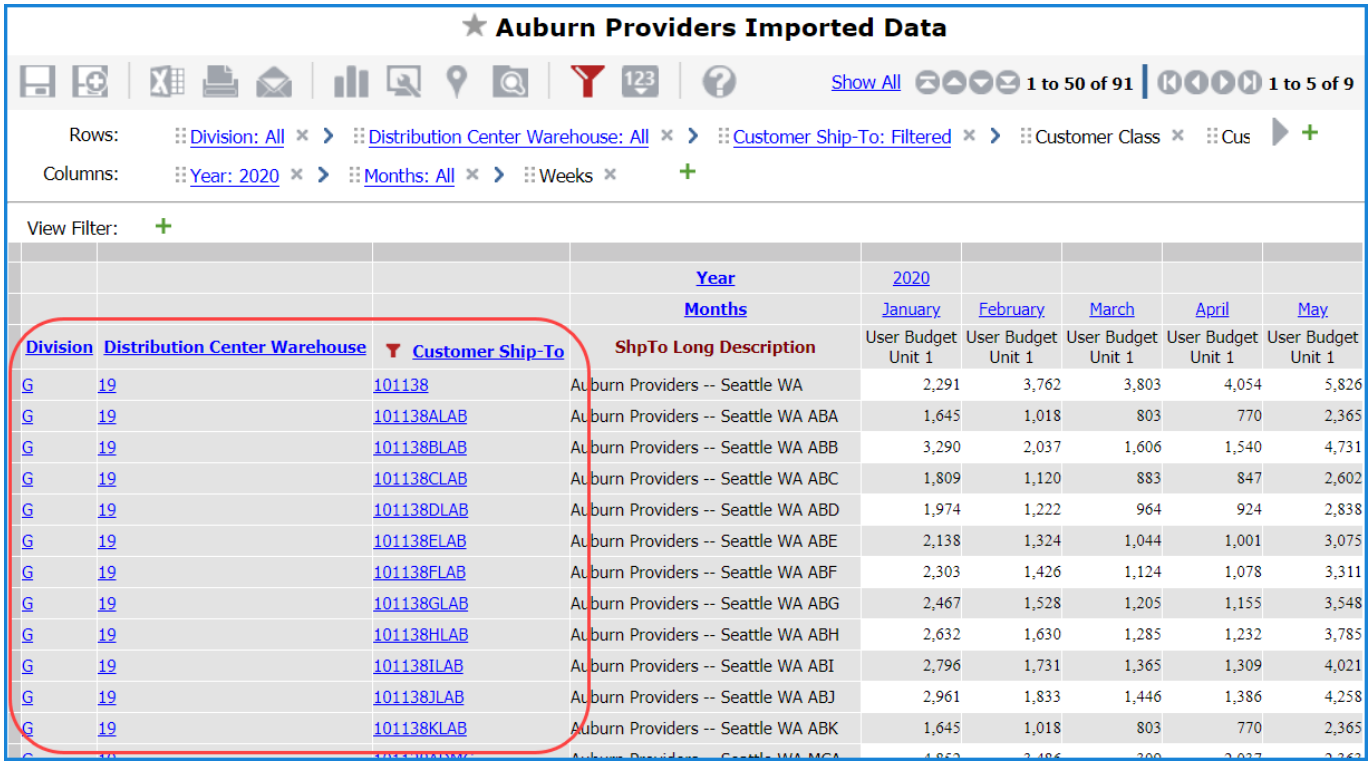
Rows: Product Brand: All × › Division × Distribution Center Warehouse × Customer Ship-To × Customer Class ×

Columns: Year: 2020 × › Months: All × › Weeks ×

View Filter:

| Year | 2020 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Months | January | February | March | April | May | June | July | August | September |
| Product Brand / PBrnd Long Description | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 |
| ? / ? | 117,351 | 155,608 | 88,247 | 91,678 | 178,224 | 141,617 | 108,401 | 175,109 | 39,448 |
| Grand Total / Grand Total | 117,351 | 155,608 | 88,247 | 91,678 | 178,224 | 141,617 | 108,401 | 175,109 | 39,448 |

Updating the drilldown path to include one or more of the three directly mapped to dimensions refreshes the view. Now you can see the data that was imported.



**Auburn Providers Imported Data**

Show All | 1 to 50 of 91 | 1 to 5 of 9

Rows: Division: All × › Distribution Center Warehouse: All × › Customer Ship-To: Filtered × › Customer Class × Cus

Columns: Year: 2020 × › Months: All × › Weeks ×

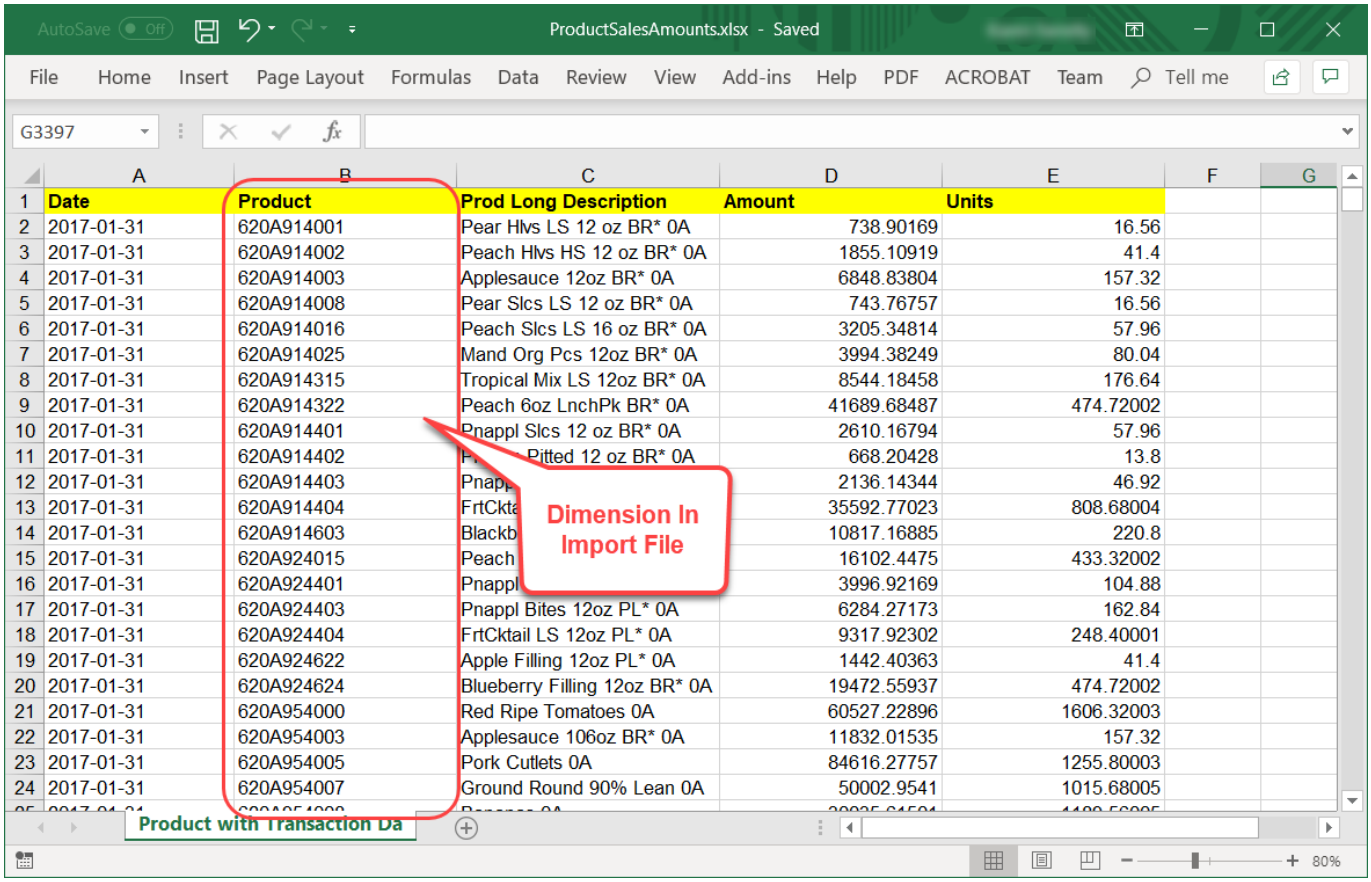
View Filter:

| | | | Year | 2020 | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | Months | January | February | March | April | May |
| Division | Distribution Center Warehouse | Customer Ship-To | ShpTo Long Description | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 | User Budget Unit 1 |
| G | 19 | 101138 | Auburn Providers -- Seattle WA | 2,291 | 3,762 | 3,803 | 4,054 | 5,826 |
| G | 19 | 101138ALAB | Auburn Providers -- Seattle WA ABA | 1,645 | 1,018 | 803 | 770 | 2,365 |
| G | 19 | 101138BLAB | Auburn Providers -- Seattle WA ABB | 3,290 | 2,037 | 1,606 | 1,540 | 4,731 |
| G | 19 | 101138CLAB | Auburn Providers -- Seattle WA ABC | 1,809 | 1,120 | 883 | 847 | 2,602 |
| G | 19 | 101138DLAB | Auburn Providers -- Seattle WA ABD | 1,974 | 1,222 | 964 | 924 | 2,838 |
| G | 19 | 101138ELAB | Auburn Providers -- Seattle WA ABE | 2,138 | 1,324 | 1,044 | 1,001 | 3,075 |
| G | 19 | 101138FLAB | Auburn Providers -- Seattle WA ABF | 2,303 | 1,426 | 1,124 | 1,078 | 3,311 |
| G | 19 | 101138GLAB | Auburn Providers -- Seattle WA ABG | 2,467 | 1,528 | 1,205 | 1,155 | 3,548 |
| G | 19 | 101138HLAB | Auburn Providers -- Seattle WA ABH | 2,632 | 1,630 | 1,285 | 1,232 | 3,785 |
| G | 19 | 101138ILAB | Auburn Providers -- Seattle WA ABI | 2,796 | 1,731 | 1,365 | 1,309 | 4,021 |
| G | 19 | 101138JLAB | Auburn Providers -- Seattle WA ABJ | 2,961 | 1,833 | 1,446 | 1,386 | 4,258 |
| G | 19 | 101138KLAB | Auburn Providers -- Seattle WA ABK | 1,645 | 1,018 | 803 | 770 | 2,365 |

### *Example 2: Incomplete Previous Level Data For A Dimension*

Here's a case where some data for a dimension was put in its default value while other data was placed in non-default values. That happened because there wasn't complete previous level data defined between the mapped dimension and the previous level dimension. If the previous level data is incomplete or incorrect, you can add that dimension to your import file and include it in your data import mapping. Another option is to contact your Stratum Administrator to have the previous level data for the dimension reviewed. If you contact your administrator, send them the import's processing report to show them how dimensions were treated during mapping and processing.

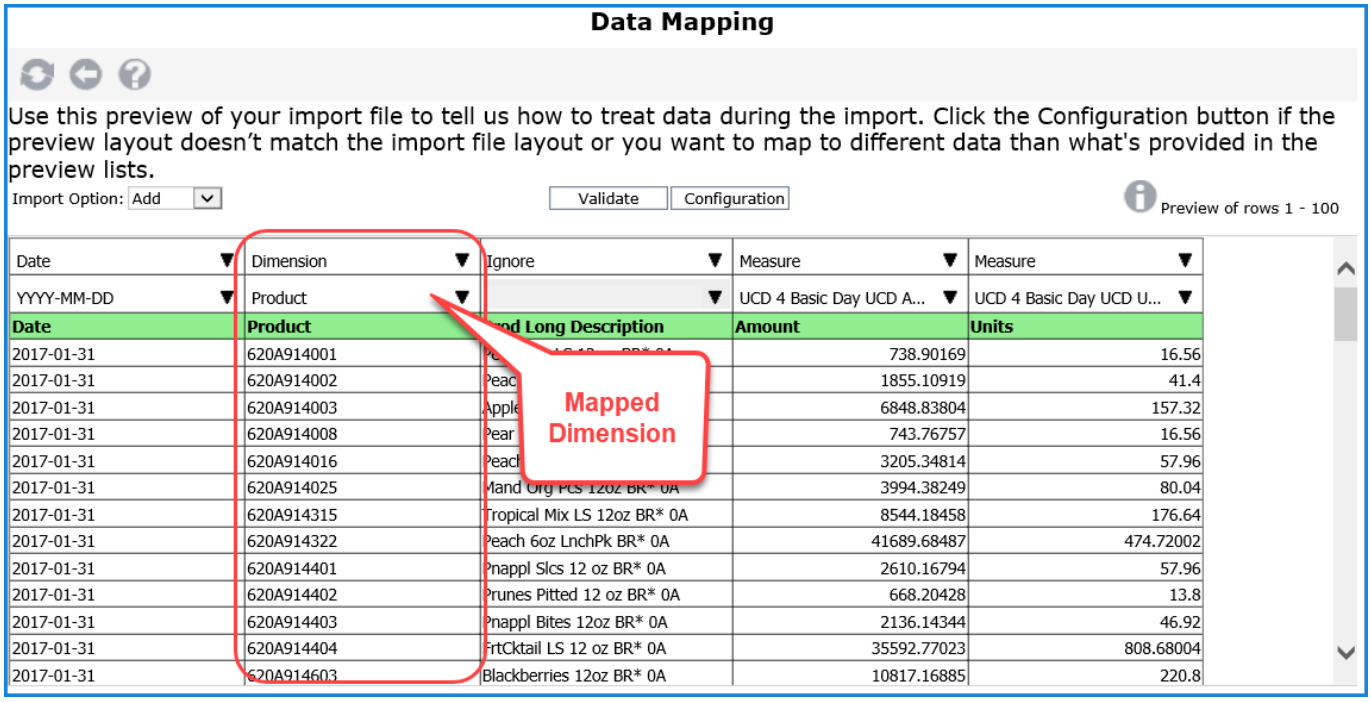
Here's the import file and the only dimension in it is Product.



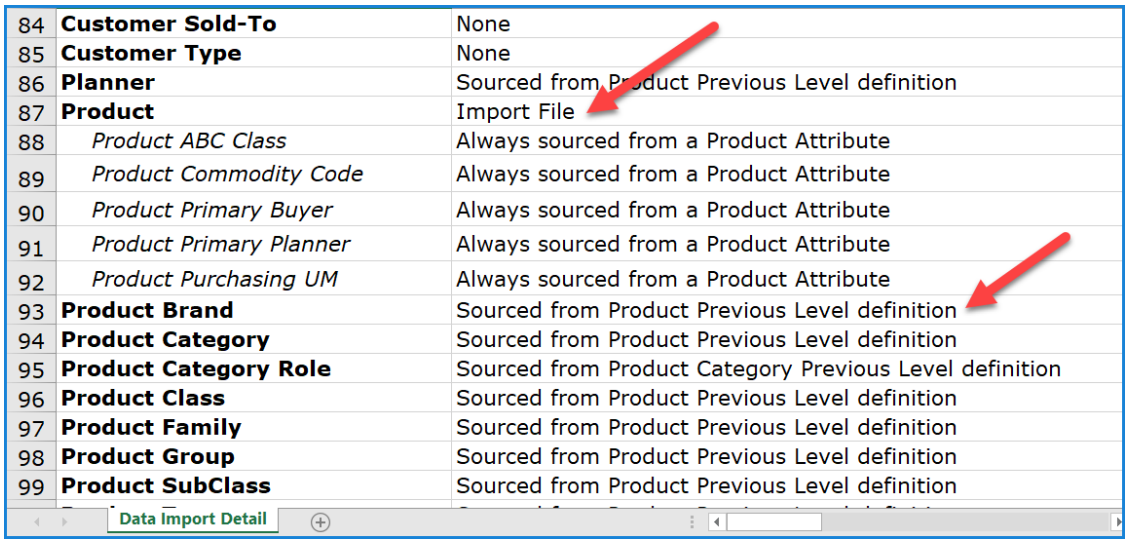

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | Date | Product | Prod Long Description | Amount | Units | | |
| 2 | 2017-01-31 | 620A914001 | Pear Hlvs LS 12 oz BR* 0A | 738.90169 | 16.56 | | |
| 3 | 2017-01-31 | 620A914002 | Peach Hlvs HS 12 oz BR* 0A | 1855.10919 | 41.4 | | |
| 4 | 2017-01-31 | 620A914003 | Applesauce 12oz BR* 0A | 6848.83804 | 157.32 | | |
| 5 | 2017-01-31 | 620A914008 | Pear Slcs LS 12 oz BR* 0A | 743.76757 | 16.56 | | |
| 6 | 2017-01-31 | 620A914016 | Peach Slcs LS 16 oz BR* 0A | 3205.34814 | 57.96 | | |
| 7 | 2017-01-31 | 620A914025 | Mand Org Pcs 12oz BR* 0A | 3994.38249 | 80.04 | | |
| 8 | 2017-01-31 | 620A914315 | Tropical Mix LS 12oz BR* 0A | 8544.18458 | 176.64 | | |
| 9 | 2017-01-31 | 620A914322 | Peach 6oz LnchPk BR* 0A | 41689.68487 | 474.72002 | | |
| 10 | 2017-01-31 | 620A914401 | Pnappl Slcs 12 oz BR* 0A | 2610.16794 | 57.96 | | |
| 11 | 2017-01-31 | 620A914402 | P Pitted 12 oz BR* 0A | 668.20428 | 13.8 | | |
| 12 | 2017-01-31 | 620A914403 | Pnapp | 2136.14344 | 46.92 | | |
| 13 | 2017-01-31 | 620A914404 | FrtCkta | 35592.77023 | 808.68004 | | |
| 14 | 2017-01-31 | 620A914603 | Blackb | 10817.16885 | 220.8 | | |
| 15 | 2017-01-31 | 620A924015 | Peach | 16102.4475 | 433.32002 | | |
| 16 | 2017-01-31 | 620A924401 | Pnappl | 3996.92169 | 104.88 | | |
| 17 | 2017-01-31 | 620A924403 | Pnappl Bites 12oz PL* 0A | 6284.27173 | 162.84 | | |
| 18 | 2017-01-31 | 620A924404 | FrtCktail LS 12oz PL* 0A | 9317.92302 | 248.40001 | | |
| 19 | 2017-01-31 | 620A924622 | Apple Filling 12oz PL* 0A | 1442.40363 | 41.4 | | |
| 20 | 2017-01-31 | 620A924624 | Blueberry Filling 12oz BR* 0A | 19472.55937 | 474.72002 | | |
| 21 | 2017-01-31 | 620A954000 | Red Ripe Tomatoes 0A | 60527.22896 | 1606.32003 | | |
| 22 | 2017-01-31 | 620A954003 | Applesauce 106oz BR* 0A | 11832.01535 | 157.32 | | |
| 23 | 2017-01-31 | 620A954005 | Pork Cutlets 0A | 84616.27757 | 1255.80003 | | |
| 24 | 2017-01-31 | 620A954007 | Ground Round 90% Lean 0A | 50002.9541 | 1015.68005 | | |

Here's the dimension mapping that was done when the import was set up.




Here's part of the Data Mapping section from the import's processing report, showing the mapped Product dimension. Import data goes directly to it, so a description of **"Import File"** shows up next to them. Dimensions with **"Sourced from … Previous Level definition"** listed next to them are the ones that have previous level relationships to the mapped dimension. Product Brand is one of the dimensions whose data will be sourced based on previous level data.

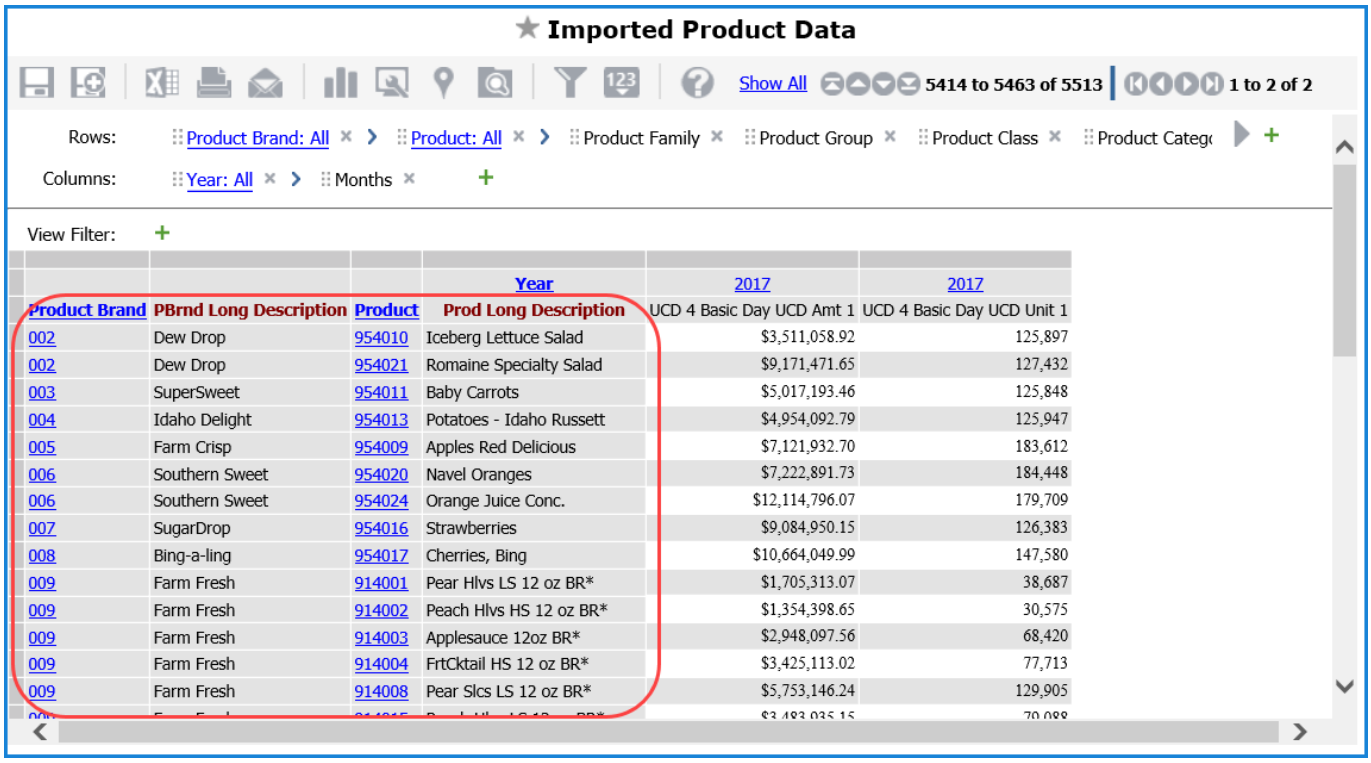


| | | |
|---|---|---|
| 84 | **Customer Sold-To** | None |
| 85 | **Customer Type** | None |
| 86 | **Planner** | Sourced from Product Previous Level definition |
| 87 | **Product** | Import File |
| 88 | *Product ABC Class* | Always sourced from a Product Attribute |
| 89 | *Product Commodity Code* | Always sourced from a Product Attribute |
| 90 | *Product Primary Buyer* | Always sourced from a Product Attribute |
| 91 | *Product Primary Planner* | Always sourced from a Product Attribute |
| 92 | *Product Purchasing UM* | Always sourced from a Product Attribute |
| 93 | **Product Brand** | Sourced from Product Previous Level definition |
| 94 | **Product Category** | Sourced from Product Previous Level definition |
| 95 | **Product Category Role** | Sourced from Product Category Previous Level definition |
| 96 | **Product Class** | Sourced from Product Previous Level definition |
| 97 | **Product Family** | Sourced from Product Previous Level definition |
| 98 | **Product Group** | Sourced from Product Previous Level definition |
| 99 | **Product SubClass** | Sourced from Product Previous Level definition |

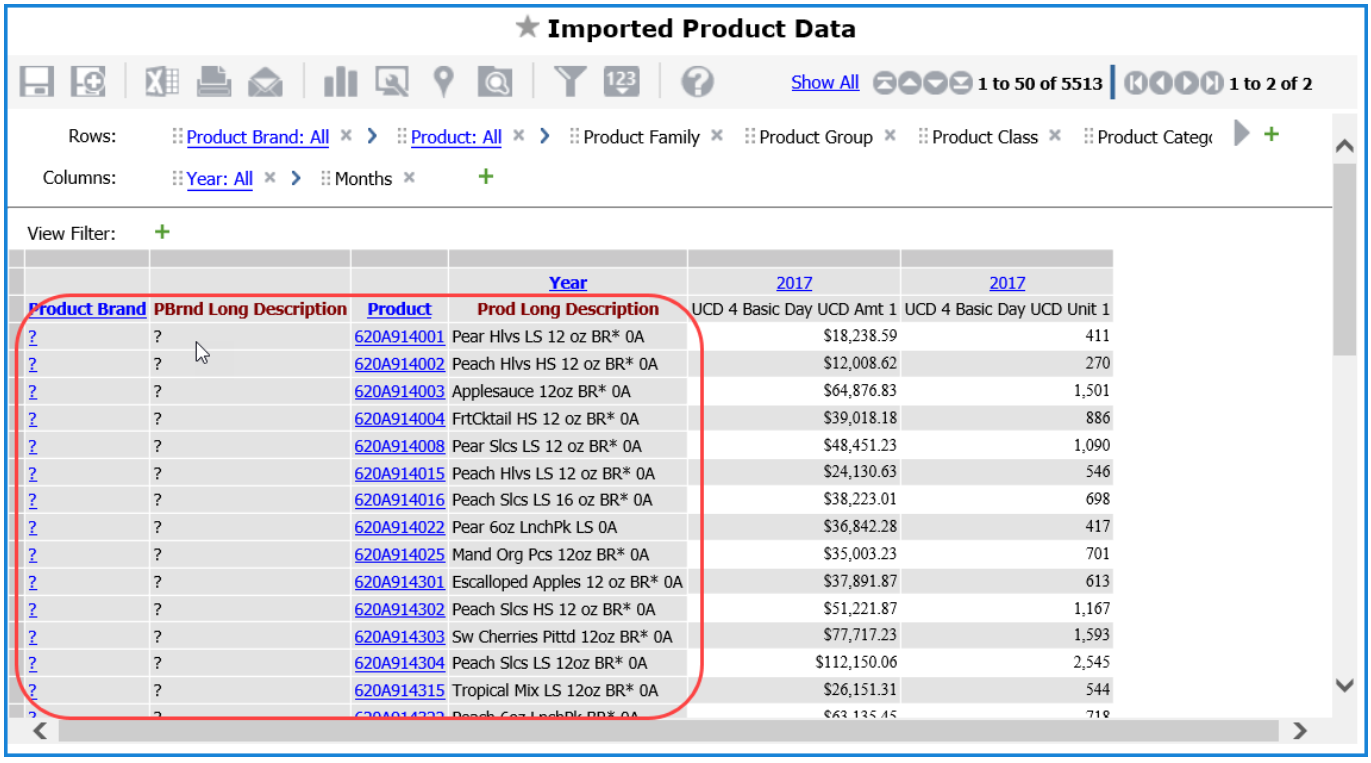
Data Import Detail

Here's a view showing import results. Product Brand and Product dimensions are included in the view. Some of the data shows up for specific values of Product Brand, as shown in these rows of the view (see first image).

All Products with the Product Brand default value of "?" do not have previous level data defined. The last image is the same view but scrolled up to where some of those default value rows exist – these rows show Products and Product Brands that do not have previous level data defined for them.




| | | | Year | 2017 | 2017 |
|---|---|---|---|---|---|
| Product Brand | PBrnd Long Description | Product | Prod Long Description | UCD 4 Basic Day UCD Amt 1 | UCD 4 Basic Day UCD Unit 1 |
| 002 | Dew Drop | 954010 | Iceberg Lettuce Salad | $3,511,058.92 | 125,897 |
| 002 | Dew Drop | 954021 | Romaine Specialty Salad | $9,171,471.65 | 127,432 |
| 003 | SuperSweet | 954011 | Baby Carrots | $5,017,193.46 | 125,848 |
| 004 | Idaho Delight | 954013 | Potatoes - Idaho Russett | $4,954,092.79 | 125,947 |
| 005 | Farm Crisp | 954009 | Apples Red Delicious | $7,121,932.70 | 183,612 |
| 006 | Southern Sweet | 954020 | Navel Oranges | $7,222,891.73 | 184,448 |
| 006 | Southern Sweet | 954024 | Orange Juice Conc. | $12,114,796.07 | 179,709 |
| 007 | SugarDrop | 954016 | Strawberries | $9,084,950.15 | 126,383 |
| 008 | Bing-a-ling | 954017 | Cherries, Bing | $10,664,049.99 | 147,580 |
| 009 | Farm Fresh | 914001 | Pear Hlvs LS 12 oz BR* | $1,705,313.07 | 38,687 |
| 009 | Farm Fresh | 914002 | Peach Hlvs HS 12 oz BR* | $1,354,398.65 | 30,575 |
| 009 | Farm Fresh | 914003 | Applesauce 12oz BR* | $2,948,097.56 | 68,420 |
| 009 | Farm Fresh | 914004 | FrtCktail HS 12 oz BR* | $3,425,113.02 | 77,713 |
| 009 | Farm Fresh | 914008 | Pear Slcs LS 12 oz BR* | $5,753,146.24 | 129,905 |




| | | | Year | 2017 | 2017 |
|---|---|---|---|---|---|
| Product Brand | PBrnd Long Description | Product | Prod Long Description | UCD 4 Basic Day UCD Amt 1 | UCD 4 Basic Day UCD Unit 1 |
| ? | ? | 620A914001 | Pear Hlvs LS 12 oz BR* 0A | $18,238.59 | 411 |
| ? | ? | 620A914002 | Peach Hlvs HS 12 oz BR* 0A | $12,008.62 | 270 |
| ? | ? | 620A914003 | Applesauce 12oz BR* 0A | $64,876.83 | 1,501 |
| ? | ? | 620A914004 | FrtCktail HS 12 oz BR* 0A | $39,018.18 | 886 |
| ? | ? | 620A914008 | Pear Slcs LS 12 oz BR* 0A | $48,451.23 | 1,090 |
| ? | ? | 620A914015 | Peach Hlvs LS 12 oz BR* 0A | $24,130.63 | 546 |
| ? | ? | 620A914016 | Peach Slcs LS 16 oz BR* 0A | $38,223.01 | 698 |
| ? | ? | 620A914022 | Pear 6oz LnchPk LS 0A | $36,842.28 | 417 |
| ? | ? | 620A914025 | Mand Org Pcs 12oz BR* 0A | $35,003.23 | 701 |
| ? | ? | 620A914301 | Escalloped Apples 12 oz BR* 0A | $37,891.87 | 613 |
| ? | ? | 620A914302 | Peach Slcs HS 12 oz BR* 0A | $51,221.87 | 1,167 |
| ? | ? | 620A914303 | Sw Cherries Pittd 12oz BR* 0A | $77,717.23 | 1,593 |
| ? | ? | 620A914304 | Peach Slcs LS 12oz BR* 0A | $112,150.06 | 2,545 |
| ? | ? | 620A914315 | Tropical Mix LS 12oz BR* 0A | $26,151.31 | 544 |

## Why Did Less Data Than Expected Get Imported?

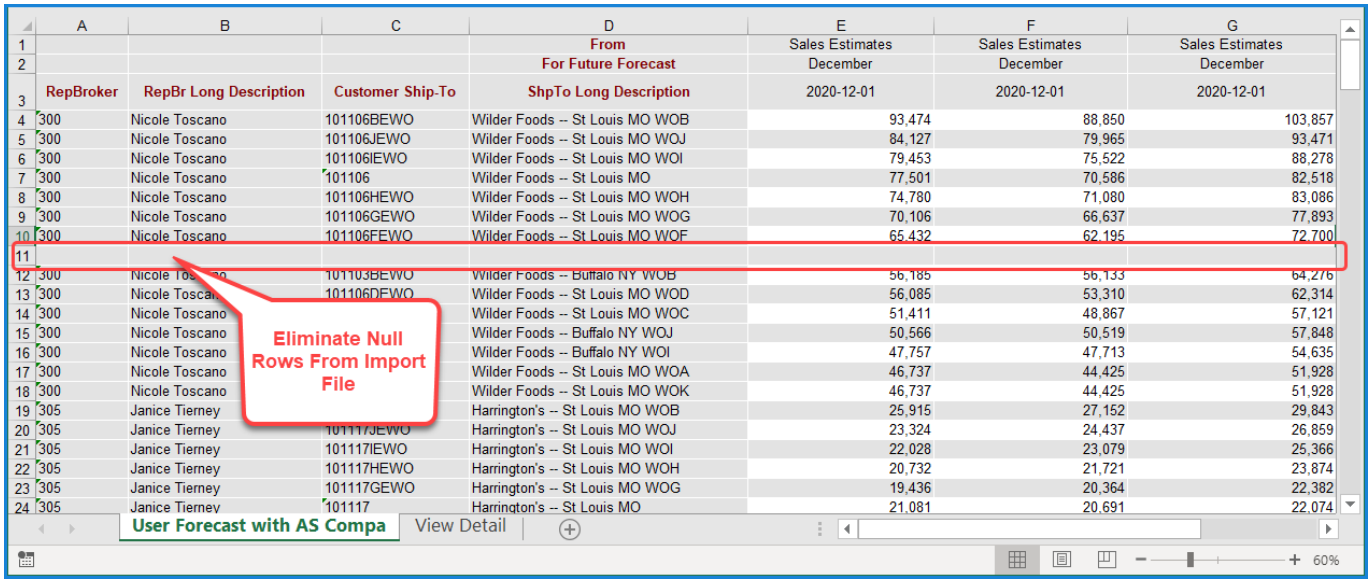
Here's some things to consider if you or other users aren't seeing some or any of the imported data you expected to see when you opened views to work with the data.

- Make sure the import is done processing. Check for a Completed status in the Data Import list window.
- Make sure the view includes the dimensions impacted by the import and you are looking at the time period(s) for which data was imported.
- Verify the user has read access to all the data – in this case, to the dimensions where data got imported. That can be verified by administrators, who can look at a user's role and user profile.
- The data may have ended up in a dimension's default value of "?". If the view where you expected to see the data has a filter applied to filter out the "?" default value, remove the filter and look at the default value. Then see if the imported data displays in the view for that default value. See also Why Did Import Data Get Added To A Dimension's Default Value '?' Member?.
- To further investigate what got imported, review details in the import processing report and compare them to your import file. The report tells you which tells got imported and how many rows were imported. See Review Processing Details For A Data Import.
    - It's possible the import file had a null row – Data Import will stop looking for data to import once it finds a null row. Look at your import file to verify it doesn't have any null rows. Those are rows without any data in them. Compare the number of rows in your file to the "Number of Rows Imported" information in the processing report.
    - You may have accidentally set some columns you intended to import as ones to "Ignore" when you were mapping the data. Compare the columns in your import file to the Data Mapping section of the processing report.

## Why Did Less Data Than Expected Show In My Import Preview?

A maximum of 100 rows of data will show in the Data Mapping window's preview of your import file. If your import file has more than 100 rows, only the first 100 are displayed for mapping purposes.

If you import file has less than 100 rows and you don't see all of them in the Data Mapping preview, exit out of the window and look at your original import file. Verify that the import file does not contain a null row. A null row is a row without any data (note that a cell with all blank spaces or with zeroes in them is not considered null). If a null row is found, the preview will stop looking for data to load into the preview window. In the following example file, you'd want to remove row 11. If you don't, the import preview will stop at that row, treat it as the end of your import file, and not consider any of the rows of data after that point.




| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | | | | From | Sales Estimates | Sales Estimates | Sales Estimates |
| 2 | | | | For Future Forecast | December | December | December |
| 3 | RepBroker | RepBr Long Description | Customer Ship-To | ShpTo Long Description | 2020-12-01 | 2020-12-01 | 2020-12-01 |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods -- St Louis MO WOB | 93,474 | 88,850 | 103,857 |
| 5 | 300 | Nicole Toscano | 101106JEWO | Wilder Foods -- St Louis MO WOJ | 84,127 | 79,965 | 93,471 |
| 6 | 300 | Nicole Toscano | 101106IEWO | Wilder Foods -- St Louis MO WOI | 79,453 | 75,522 | 88,278 |
| 7 | 300 | Nicole Toscano | 101106 | Wilder Foods -- St Louis MO | 77,501 | 70,586 | 82,518 |
| 8 | 300 | Nicole Toscano | 101106HEWO | Wilder Foods -- St Louis MO WOH | 74,780 | 71,080 | 83,086 |
| 9 | 300 | Nicole Toscano | 101106GEWO | Wilder Foods -- St Louis MO WOG | 70,106 | 66,637 | 77,893 |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods -- St Louis MO WOF | 65,432 | 62,195 | 72,700 |
| 11 | | | | | | | |
| 12 | 300 | Nicole To | 101103BEWO | Wilder Foods -- Buffalo NY WOB | 56,185 | 56,133 | 64,276 |
| 13 | 300 | Nicole Tosca | 101106DEWO | Wilder Foods -- St Louis MO WOD | 56,085 | 53,310 | 62,314 |
| 14 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOC | 51,411 | 48,867 | 57,121 |
| 15 | 300 | Nicole Toscano | | Wilder Foods -- Buffalo NY WOJ | 50,566 | 50,519 | 57,848 |
| 16 | 300 | Nicole Toscano | | Wilder Foods -- Buffalo NY WOI | 47,757 | 47,713 | 54,635 |
| 17 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOA | 46,737 | 44,425 | 51,928 |
| 18 | 300 | Nicole Toscano | | Wilder Foods -- St Louis MO WOK | 46,737 | 44,425 | 51,928 |
| 19 | 305 | Janice Tierney | | Harrington's -- St Louis MO WOB | 25,915 | 27,152 | 29,843 |
| 20 | 305 | Janice Tierney | 101117JEWO | Harrington's -- St Louis MO WOJ | 23,324 | 24,437 | 26,859 |
| 21 | 305 | Janice Tierney | 101117IEWO | Harrington's -- St Louis MO WOI | 22,028 | 23,079 | 25,366 |
| 22 | 305 | Janice Tierney | 101117HEWO | Harrington's -- St Louis MO WOH | 20,732 | 21,721 | 23,874 |
| 23 | 305 | Janice Tierney | 101117GEWO | Harrington's -- St Louis MO WOG | 19,436 | 20,364 | 22,382 |
| 24 | 305 | Janice Tierney | 101117 | Harrington's -- St Louis MO | 21,081 | 20,691 | 22,074 |

## Why Did More Data Than Expected Get Imported?

Here's some reasons why you might see more data than expected:

- You meant to mark some columns as Ignore in the Data Mapping window but forgot to do so before processing the import.
- There were hidden rows in your import file. Hidden rows always get included in a data import. You need to remove them from your import file if you do not want them included.
- Someone else imported data to the same dimensions and measures around the same time as you. Check the Data Import list window to see what was recently processed and review the report for those imports. See Review Processing Details For A Data Import.

To further investigate what got imported, review details in the import processing report and compare them to your import file. The report tells you which tells got imported and how many rows were imported. See Review Processing Details For A Data Import.

## Why Did More Data Than Expected Show up in My Import Preview?

That can happen if your import file had hidden rows and columns. Hidden rows and columns in import files aren't ignored by Data Import. Remove hidden rows from import files before you do an import. Remove hidden columns from import files before using them or mark the columns as Ignore when you preview data in the Data Mapping window.

## Why Didn't I Get an Email About a Data Import After it Finished Processing?

A few things can influence email delivery.

1. The Data Import may still be processing. Check its status in the Data Import list window or open its Processing Report to review processing stage details. See the topic Review Processing Details For A Data Import.

2. An email address might not be specified for your user profile in Stratum.Viewer. An administrator can check your profile and verify it has an email defined for it.

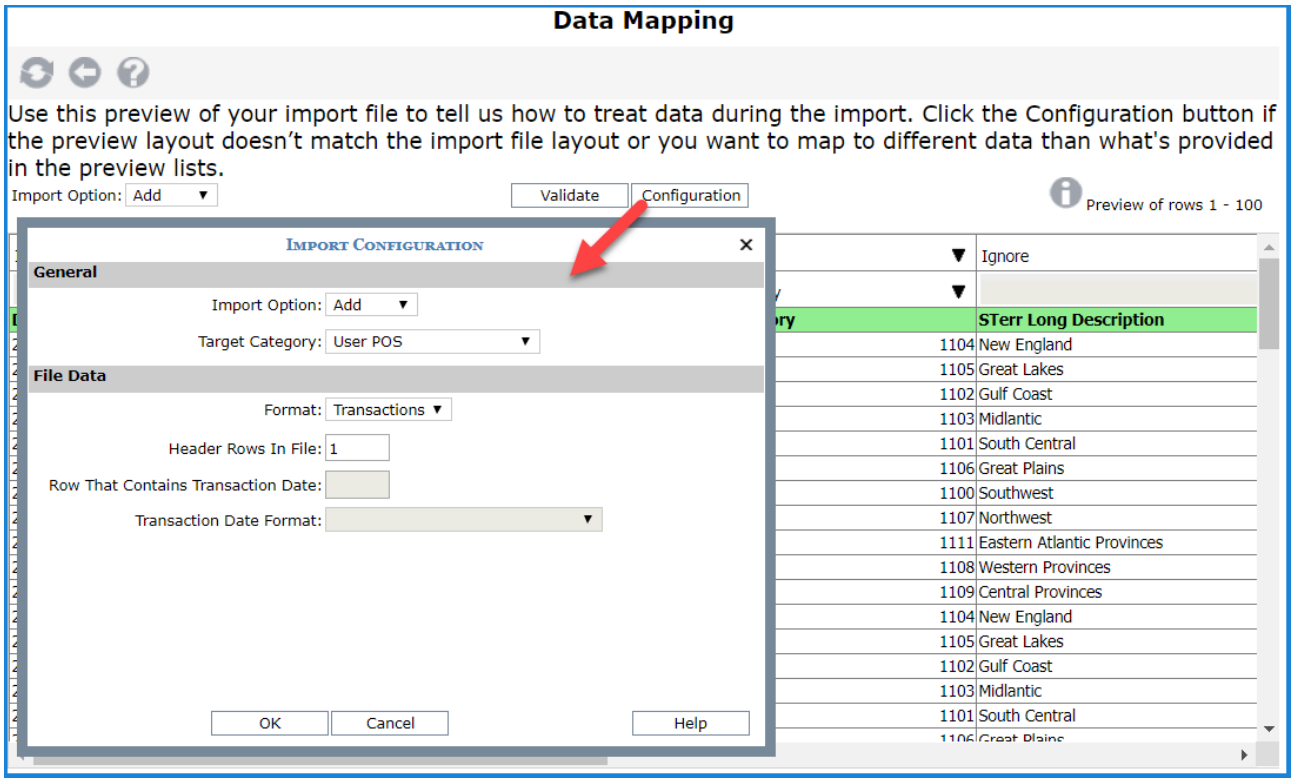
3. The email may have been routed to your Junk email folder instead of your Inbox.

## Why Didn't The Import Configuration Window Show When I Uploaded An Import File?

Data Import makes configuration selections for you automatically when it picks up on and remembers selections from prior imports. Automatic configuration can save you steps in the import setup process.

You can open the import configuration window and make changes anytime from the Data Mapping preview by clicking Configuration.

See also Automatic Data Mapping And Import Configuration.



## Why Isn't A Stratum Category Displaying In The Category Window?

If a category you expected to see in the Category window isn't showing up there, verify the following about the category (also known as a measure group). A Category only shows in the window if all of the following conditions are met:

1. A Stratum Import Calendar must exist for the Structure Code associated with the category.

2. In Stratum.Connector, the applicable Measure Group must be selected. This means at least one of the measures within the group must be selected. The Measure Group selection window is used to select or deselect Measure Groups.

3. In Stratum.Connector, at least one partition (Year) must be selected for the applicable Measure Group.

4. A Full process must have been run in Stratum.Connector. For example, remember to kick off a Full process after major changes such as edits made to selections in the Measure Group selection window.

## Why Were Negative Numbers Treated as Positive Numbers?

You need to format negative numbers with either a negative sign or parentheses marks for them to be treated as a negative number. If you only used a special color like red to format your negative numbers, the import won't treat the numbers as negatives. Verify that at a minimum you used a negative sign or parentheses for negative numbers when you set up the import file. The format shown in the second column below is an example of a valid negative number format for an import.

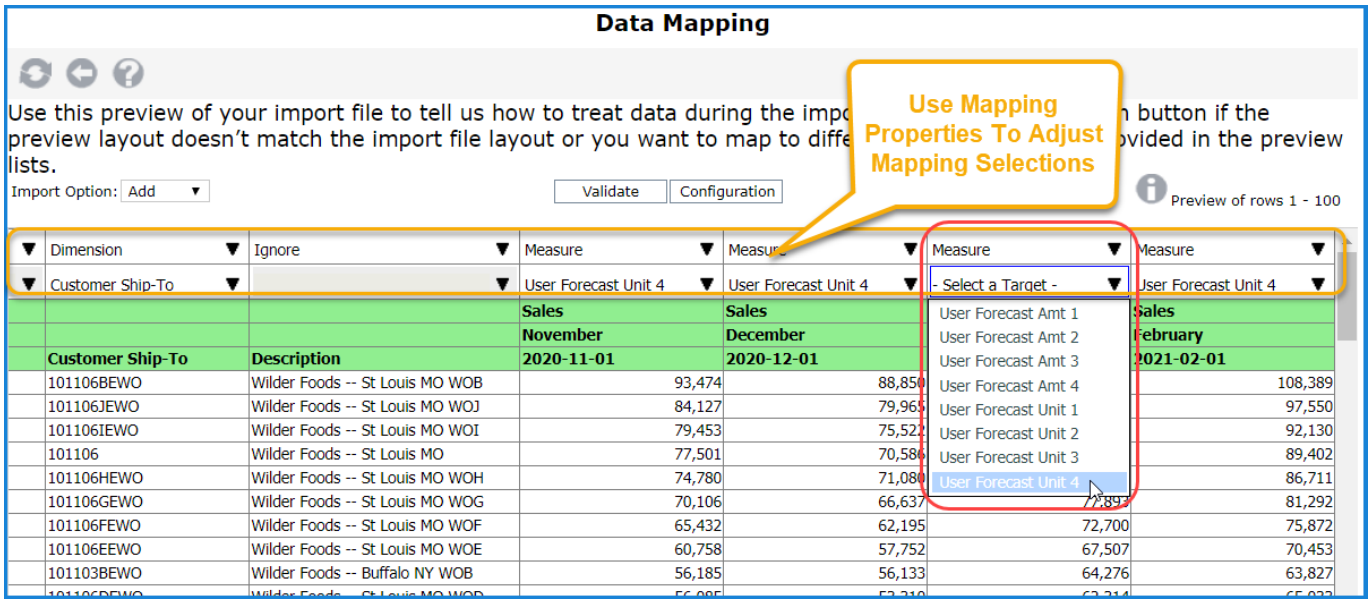
| | |
|---|---|
| Amount | Return Amount |
| $28,124,735 | ($199,899) |
| $26,028,244 | ($344,221) |
| $33,241,865 | ($508,068) |
| $24,524,936 | ($174,813) |
| $32,516,111 | ($504,947) |
| $24,129,027 | ($225,593) |
| $33,329,323 | ($413,073) |
| $56,729,303 | ($421,539) |
| $29,718,949 | ($412,296) |
| $31,429,233 | ($409,534) |
| $19,792,199 | ($459,813) |
| $50,490,321 | ($691,327) |

## Why Were Some Mapping Selections Made For Me Automatically & Can I Change Selections?

Data Import makes mapping selections for you automatically when it picks up on and remembers selections from prior imports. Automatic mapping can save you steps in the import setup process.

You can change mapping selections using controls in the top two rows of the Data Mapping preview.

See also Automatic Data Mapping And Import Configuration.



## Corporate Controlled Category

Corporate controlled categories contain data that is controlled at the corporate level. This data is typically from corporate business systems such as Order Entry, ERP or CRM and is usually controlled by IT.

**Note:** Measures from 'Corporate' controlled categories can be used with Data Copy functionality, which allows users to copy Stratum data from one measure to another measure.

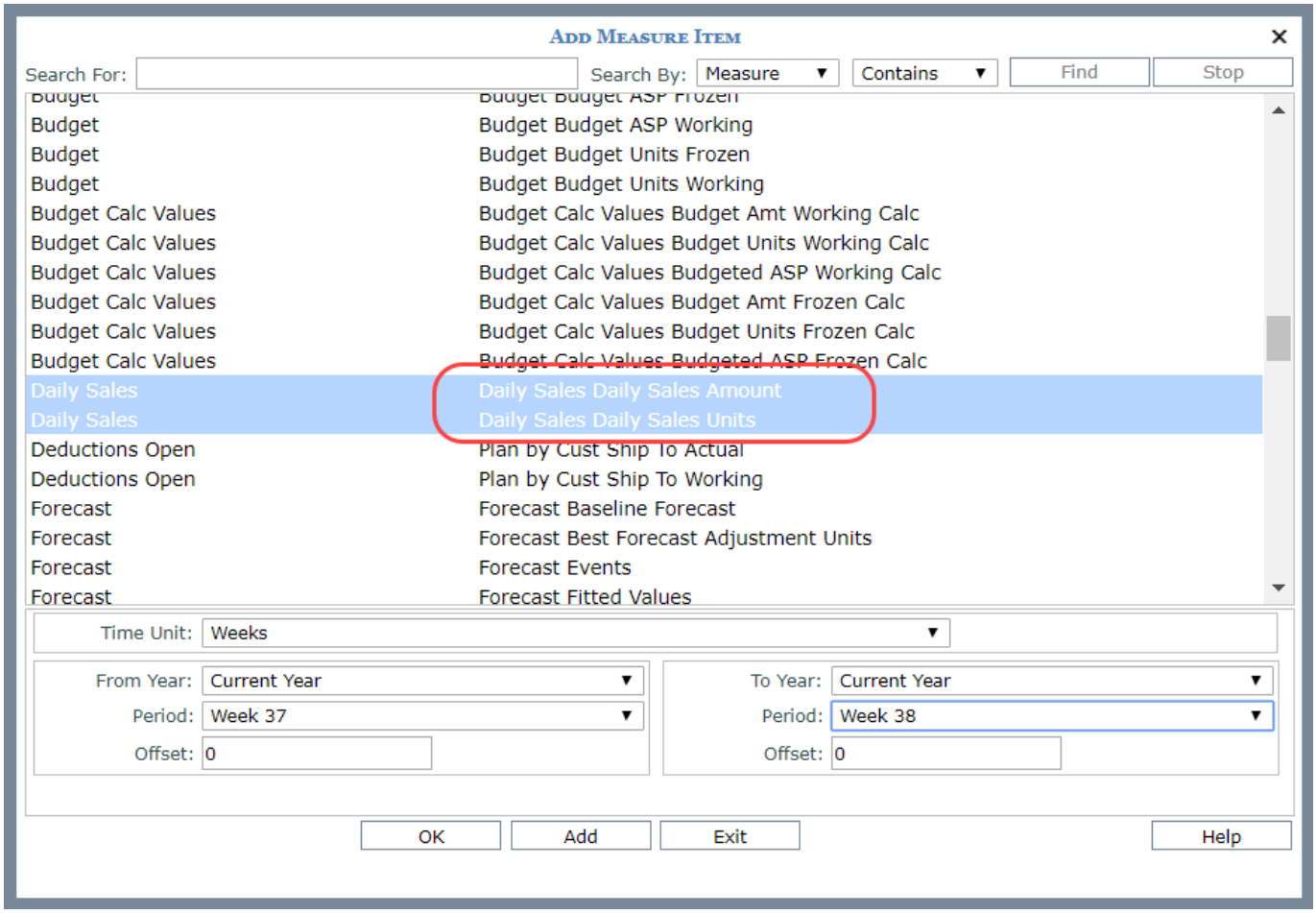
## Measure

Measures are the basic units of data for your dimensions, hierarchies, and levels. Measures are used to create and insert measure items into your views. They can also be used when building the expressions for calculated measure items.

The two measure items in the following view were created from two Daily Sales measures using the Add Measure Item window.

View Name: *Daily Sales by Customer Type*
View Filter

| Customer Type | Ship-To Territory | Daily Sales Daily Sales Amount Wk 37 2014 to Wk 38 2014 | Daily Sales Daily Sales Units Wk 37 2014 to Wk 38 2014 |
|---|---|---|---|
| Class B Customer | Southwest | $286,797 | 2,554 |
| | South Central | $317,063 | 2,734 |
| | Gulf Coast | $348,421 | 3,227 |
| | Midlantic | $400,396 | 3,779 |
| | New England | $529,373 | 4,516 |
| | Great Lakes | $189,547 | 1,741 |
| | Great Plains | $329,536 | 3,160 |
| | Northwest | $277,316 | 2,471 |
| | Western Provinces | $186,334 | 1,545 |
| | Central Provinces | $529,959 | 4,555 |
| | Eastern Atlantic Provinces | $596,137 | 5,502 |
| Grand Total | | $3,990,880 | 35,784 |


ADD MEASURE ITEM
Search For:
Search By: Measure
Contains
Find
Stop
Budget Budget ASP Frozen
Budget Budget Budget ASP Working
Budget Budget Budget Units Frozen
Budget Budget Budget Units Working
Budget Calc Values Budget Calc Values Budget Amt Working Calc
Budget Calc Values Budget Calc Values Budget Units Working Calc
Budget Calc Values Budget Calc Values Budgeted ASP Working Calc
Budget Calc Values Budget Calc Values Budget Amt Frozen Calc
Budget Calc Values Budget Calc Values Budget Units Frozen Calc
Budget Calc Values Budget Calc Values Budgeted ASP Frozen Calc
Daily Sales Daily Sales Daily Sales Amount
Daily Sales Daily Sales Daily Sales Units
Deductions Open Plan by Cust Ship To Actual
Deductions Open Plan by Cust Ship To Working
Forecast Forecast Baseline Forecast
Forecast Forecast Best Forecast Adjustment Units
Forecast Forecast Events
Forecast Forecast Fitted Values
Time Unit: Weeks
From Year: Current Year
Period: Week 37
Offset: 0
To Year: Current Year
Period: Week 38
Offset: 0
OK
Add
Exit
Help

## Regular Measure Item

Regular measure items are items based on the measures in the Analysis Services database for your Stratum.Viewer environment.

Regular measure items can be created with or without time ranges, depending on the Time Range property for a view. If the Time Range property is Yes for a view, you can specify time ranges for its measure items. If the Time Range property is No, then time range functionality is disabled, but you can use time hierarchies in the view.

The regular measure items in the following view are based on Daily Sales measures and have a time range of Week 37 through 38 of 2014.

View Name: *Daily Sales by Customer Type*

View Filter

| Customer Type | Ship-To Territory | Daily Sales Daily Sales Amount Wk 37 2014 to Wk 38 2014 | Daily Sales Daily Sales Units Wk 37 2014 to Wk 38 2014 |
|---|---|---|---|
| Class B Customer | Southwest | $286,797 | 2,554 |
| | South Central | $317,063 | 2,734 |
| | Gulf Coast | $348,421 | 3,227 |
| | Midlantic | $400,396 | 3,779 |
| | New England | $529,373 | 4,516 |
| | Great Lakes | $189,547 | 1,741 |
| | Great Plains | $329,536 | 3,160 |
| | Northwest | $277,316 | 2,471 |
| | Western Provinces | $186,334 | 1,545 |
| | Central Provinces | $529,959 | 4,555 |
| | Eastern Atlantic Provinces | $596,137 | 5,502 |
| **Grand Total** | | **$3,990,880** | **35,784** |

## Target Category For Data Import

Data Imports have data mapping properties that define where to allocate the imported data to when a Data Import gets processed. Data can be imported into measures that belong to the category that's been selected as the Target Category for the Data Import.

## User Controlled Category

User controlled categories contain data that is controlled by the user community. Users can import data from corporate business systems as well as external data sources such as demographics, housing trends, or other unique data that will compliment your Stratum data.