Working with Data Import Stratum.Viewer 7

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 <u>Expected Show up in My Import</u>
 <u>Preview?</u>
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Definitions

- Data Steward
- <u>Enhanced Category: Data</u> <u>Steward Or User Controlled</u>
- Measure
- Regular Measure Item
- <u>Standard Corporate Controlled</u>
 <u>Category</u>
- <u>Target Category For Data Import</u>

Getting Started

Access to Data Import

Security and view administrators have access to Data Import functionality from a Data Import option in the Analyst Tools menu off of the main menu in Stratum. They can import from local Excel, CSV, and Text files. They can set up Data Import Templates. Security administrators with a Data Steward designation have access to additional functionality such as importing from local SQL Server databases and Azure cloud sources or using a Stratum Cloud Import API to do their imports. More details follow in the table below.

Advanced and casual users can access some Data Import features such as importing from Excel, CSV, or Text files if administrators give them direct access to the Data Import window – and in that case, they can only work with data imports and templates that 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.

This table shows you what features are available when you have both a Stratum Analyst Hub <u>and</u> Stratum Cloud Import license for your implementation.

| Data Import Functionality* | Who Can Use The Functionality* |
|---|--|
| Assign <u>Data Steward</u> Designation To Security Administrators | Unlimited number of Data Stewards are allowed |
| Add & Use Data Import Templates | Add/use templates for any data import |
| Import from Azure cloud sources | Only the Data Stewards can do so |
| Import from local SQL Server database table | Only the Data Stewards can do so |
| Import from local files (Excel, CSV, Text) | Any Data Steward and all other users can do so |
| Initiate Imports With Data Import Interface In Stratum Viewer | Any Data Steward and all other users can do so |
| Initiate Imports With Stratum Cloud Import API (from local SQL Server database tables or Azure cloud sources) | Only the Data Stewards can do so |
| Import to <u>Enhanced / Data Steward</u> Controlled Categories | Only the Data Stewards can do so |
| Import into Enhanced / User Controlled Categories | Any Data Steward and all other users can do so |

*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 2019 or 2022 server with SQL Server 2019 or 2022. It is not available for implementations running Stratum.Server on an IBM i Server. A Stratum Cloud Import license is required to give Security Administrators a Data Steward level of access and to import from local SQL Server databases or Azure cloud sources.

Introduction to Data Import

User-curated data housed in Excel spreadsheets or other types of sources 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.

- Several familiar, industry-standard types of data sources can be used whenever you're setting up an import they include Excel, CSV, or Text files.
- Extend your import source options with a Stratum Cloud Import license. With that, you can import from local SQL Server databases or Azure cloud sources. Reliably transform and move your transactional data into the Stratum Data Hub from Azure Blob Containers, Azure File Share, Azure SQL Databases, and Azure Data Pipelines.
- Streamline the setup of Data Imports by using Data Import Templates. You can create a library of reusable templates with stored mapping details to automate some key data import setup steps. A template can be selected for future use as often as needed for importing similar types of data or each time new data becomes available for a specific category.
- Also, a Stratum Cloud API platform provides another option for handling Azure imports or local SQL Server database imports use the API to create and process those imports or use the standard importing interface within Stratum.Viewer.

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 from the main menu in Stratum.Viewer. The Data Mapping window and optionally Data Import Templates guide you through configuring and importing data. The imported data is available immediately in Viewer to build your Stratum views and dashboards.

Example 1

In this example, daily sales data is being used to populate measures in a Point of Sales category. The data starts off in an Excel spreadsheet with the date, dimension, and measure data for the import.

| | | | UCD Daily ShipTo Region | n Territory Transactions For 2019.xlsx | - Saved | ▶ - □ X |
|------|------------|--------------------|-------------------------|--|------------------------------|--------------------|
| Fil | e Home | Insert Page Layout | Formulas Data Revie | ew View Add-ins Help | PDF ACROBAT Team | n 🔎 Tell me 🖻 🖵 |
| 48 | • | · × × fr 20 | 18-12-30 | | | ~ |
| ~~~ | | | 10 12 50 | 1 | 1 | |
| | Α | В | С | D | E Dailu Oalaa Dailu Oalaa | F 🔺 |
| 1 | Days | Ship-To Region | Ship-To Territory | STerr Long Description | Amount | 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 | \$3,7 <mark>1</mark> 5 | 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 🔻 |
| | Data | (+) | | I 4 | | |
| iiii | | | | | | 」 − − + 90% |

Properties in a configuration window then a mapping window are used to tell Viewer what to do with the data.

| | | × | | | | | | | | |
|-----------------------------|------------------------|--------|------|--|--|--|--|--|--|--|
| Source Of Data Fo | Import: Local File | | | | | | | | | |
| Sou | Source Type: Excel | | | | | | | | | |
| Target C | ategory: User POS 🗸 | | | | | | | | | |
| | Format: Transactions 🗸 | | | | | | | | | |
| Header Row | In File: 1 | | | | | | | | | |
| Row That Contains Transacti | on Date: | | | | | | | | | |
| Transaction Date | Format: | \sim | | | | | | | | |
| | DK Cancel | | Help | | | | | | | |

In this case, no template is added while setting up the import mappings. The Data Mapping window properties, including the description given to the import, will apply to this import only and aren't saved as a template to be used in the future. See Example 2 for a template example. Once this import is processed, data will be available in Viewer immediately for building views and dashboards.

| | | Data Ma | appin | g - Data Import | : | | |
|------------------------|--|---------------------------|-----------------|----------------------------|---------|---------------------------------|-------------------------------|
| 0000 | 2 | | | | | | |
| Use the Configuratio | n options and Mapping preview to | tell us how to treat dat | a for the | e import. | | | |
| | | | | | | | |
| Description: Data from | m 2018 and 2019 for Point of Sales 4 A | mt and Units | | Conf | figur | ration 🗌 Delete Category Data B | efore Import |
| Click Process to impor | rt your data or click Add Template first | to save mapping for futur | e use. A | dd Template | | | |
| Date | Date 🔻 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 | | | \$3,715 | 600 |
| 2018-12-30 | | 53 | 1107 | Northwest | | \$3,508 | 604 |
| 2018-12-30 | | 54 | 1111 | Eastern Atlantic Provinces | | \$8,742 | 1,594 |
| 2018-12-30 | | 55 | 1108 | Western Provinces | | \$4,010 | 755 |
| 2018-12-30 | | 55 | 1109 | Central Provinces | | \$5,198 | 8 882 |
| 2019-01-06 | | 50 | 1104 | New England | | \$10,782 | 1,984 |
| 2019-01-06 | | 50 | 1105 | Great Lakes | | \$1,535 | 5 257 |
| 2019-01-06 | | 51 | 1102 | Gulf Coast | | \$4,956 | i 877 |
| 2019-01-06 | | 51 | 1103 | Midlantic | | \$5,347 | 988 |
| 2019-01-06 | | 52 | 1101 | South Central | | \$8,326 | 5 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 | 55 |
| 2019-01-06 | | 55 | 1109 | Central Provinces | | \$5.198 | 882 |

Example 2

In the following example, a text file with Point of Sales data is used for the import source and a Data Import Template is being setup to automate some configuration and mapping steps – the template can be reused the next time this type of data is imported.

| 8 | Search Str | atum Views | 2 | КЭE |
|---|---|--|--|--|
| > | Dat | a Import | | |
| 6 S C S S S S S S S S S S S S S S S S S | | | | |
| Catee Choose The Source Of Data For This Import | X Submitted By Karen Shype Mary Leonard Mary Leonard Mary Leonard Karen Shype Karen Shype Mary Leonard Mary Leonard Mary Leonard | Submitted 08/05/2022 12:29:59 08/13/2022 11:50:04 08/13/2022 11:52:06 08/13/2022 12:02:00 08/17/2022 11:15:54 10/10/2019 12:38:39 10/10/2019 12:40:02 | Completed 08/05/2022 12:30:02 08/13/2022 11:50:09 08/13/2022 11:52:10 08/13/2022 12:02:03 08/17/2022 11:15:57 10/10/2019 12:38:47 10/10/2019 12:40:36 | Status File/Table Completed Budget 20 Completed User Budg Completed User Budg Completed User Budg Completed Budget 20 Completed Protect W |
| C Open ← → ∨ ↑ | | ~ | U Search 7.6 Test Impo | × rt Files م |
| Organize New folder This PC | Name | | | Type |
| 3D Objects | | | | |
| Desktop Documents | 1 | | | |
| Downloads | Historical Point of Sa | iles Data | | Text Documer |
| Music | | | | |
| Pictures | £ | | | |
| Windows-SSD (C) | | | | The second se |
| • • • • • • • • • • • • • • • • • • • | | | | |
| | · | | | and the second sec |
| ~ | < | | | > |
| File name: Historical Point of Sales D | ata 2023 | | ✓ Custom files | ~ |
| | | Upload from mo | bile Open | Cancel |

Data configuration and mapping choices about where data gets imported to were initially specified in Import Configuration and Data Mapping windows.

| Import Configuration | × |
|---------------------------------------|------|
| Source Of Data For Import: Local File | |
| Source Type: Text | |
| Target Category: User POS | |
| Delimiter: Tab 🗸 | |
| Field Quote: Double Quotes 🗸 | |
| | |
| | |
| OK Cancel H | lelp |

| | Data Mapping - Data Import | | | | | | | | | | | |
|---|----------------------------|-------------------|----------------------------|----------------|-----------------|--|--|--|--|--|--|--|
| | | | | | | | | | | | | |
| Use the Configuration options and Mapping preview to tell us how to treat data for the import. | | | | | | | | | | | | |
| Description: Importing historical point of sales data Configuration | | | | | | | | | | | | |
| Click Process to import your data or click Add Template first to save mapping for future use Add Template | | | | | | | | | | | | |
| 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 | User POS Amt 4 | User POS Unit 4 | | | | | | | |
| 2020-01-03 | 50 | 1104 | New England | 10781.52774 | 1983.57996 | | | | | | | |
| 2020-01-03 | 50 | 110 | Great Lakes 1535. | | 256.91162 | | | | | | | |
| 2020-01-03 | 51 | . 1102 | 2 Gulf Coast | 4956.05974 | 876.89263 | | | | | | | |
| 2020-01-03 | 51 | . 1103 | 3 Midlantic | 5347.29324 | 987.53808 | | | | | | | |
| 2020-01-03 | 52 | 110: | South Central | 8326.19418 | 1537.59532 | | | | | | | |
| 2020-01-03 | 52 | 1106 | Great Plains | 5382.35997 | 992.38091 | | | | | | | |
| 2020-01-03 | 53 | 1100 | Southwest | 3714.50692 | 600.03024 | | | | | | | |
| 2020-01-03 | 53 | 110 | 7 Northwest | 3508.27814 | 604.05577 | | | | | | | |
| 2020-01-03 | 54 | 111: | Eastern Atlantic Provinces | 8741.56617 | 1593.94681 | | | | | | | |
| 2020-01-03 | 55 | 1100 | Western Provinces | 4009.60886 | 754.64454 | | | | | | | |
| 2020-01-03 | 55 | 1109 | Central Provinces | 5197.50859 | 882.43146 | | | | | | | |
| 2020-01-13 | 50 | 1104 | New England | 10781.52774 | 1983.57996 | | | | | | | |
| 2020-01-13 | 50 | 110 | Great Lakes | 1535.0991 | 256.91162 🗸 | | | | | | | |

From the Data Mapping window shown above, the "Add Template" button was clicked to save configuration and mapping selections as a template. The new template got applied to the current import for processing it, and the template can be reused for future imports to the same category.

| | Data Import Templates | | | | | | | | | | | | | |
|--|-----------------------|--|-------------------|------------------------|----------------|--|--|--|--|--|--|--|--|--|
| | | | | 2 | | | | | | | | | | |
| Name: | Point of s | Sales Data, Amour | nts and Units | | | | | | | | | | | |
| Description: | Data for | POS by Territory | | | | | | | | | | | | |
| Type: | Global | | | | ~ | | | | | | | | | |
| .,, | | | | | | | | | | | | | | |
| | Delet | e Category Data B | efore Import | | | | | | | | | | | |
| Configuration: | | | | | | | | | | | | | | |
| Source Of Data For I Source Type: Target Category: Delimiter: Field Quote: | Import: | Local File Text User POS Tab Double Quotes | | | * | | | | | | | | | |
| Mapping: Date | | Dimension | Dimension | Ignore B | Measure | | | | | | | | | |
| yyyy-mm-dd (2012- | 03-01) | Ship-To Region | Ship-To Territory | | User POS Amt 4 | | | | | | | | | |
| Days | | Ship-To Region | Ship-To Territory | STerr Long Description | User POS Amt 4 | | | | | | | | | |
| • | | | | | • | | | | | | | | | |
| Created Date: | 05/17/20 | 24 11:21:14 | | | | | | | | | | | | |
| Owner: | Karen Sh | arpey | | | | | | | | | | | | |
| Last Updated Date: | 05/17/20 | 24 11:21:14 | | | | | | | | | | | | |
| Last Updated By: | Karen Sh | arpey | | | | | | | | | | | | |
| Last Used Date: | | | | | | | | | | | | | | |
| Last Used By: | | | | | | | | | | | | | | |
| Template ID: | 38 | | | | | | | | | | | | | |

Excel 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.

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

| | | AutoSave 💽 🗗 🌱 👻 👻 Sales Event Transactions 2019-10-16.xlsx - Saved 🛛 🗖 — 🗆 🗙 | | | | | | | | | | | |
|----|--------------|---|----------------|------------------|---------|-----------|---------------------|-------------------------|------|--------------|-----|---------------|--------|
| 1 | File Home | Insert | Page | Layout F | ormula | as Data I | Review View | Add-ins Help PDF | ACRO | BAT Team | Q | Tell me 🖻 | P |
| 17 | 705 - | : | × | √ fx | | | | | | | | | ~ |
| | Δ | ļ | 2 | G | | D | F | F | | G | | ц | |
| 1 | Days | Distril Cha | bution nnel | Product Class | De | scription | Product Category | Description | Sa | ales Event 3 | | Sales Event 4 | |
| 2 | 2019-01-03 | DIR | | В | | ed | 200 | vsh Vegetables | | i | 150 | | 737 |
| 3 | 2019-01-03 | DIR | | В | Brand | ed | 201 | d Pruit | | 4 | 468 | 1, | ,936 |
| 4 | 2019-01-03 | DIR | | В | Brand | ed | 202 | | | | 75 | | 438 |
| 5 | 2019-01-03 | DIR | | В | Brand | ed | 203 | 1 Header | | | 87 | 493 | |
| 6 | 2019-01-03 | DIR | | В | Brand | ed | 204 | Pow | | 2 | 224 | | 931 |
| 7 | 2019-01-03 | DIR | IR B | | Branded | | 207 | | | | 42 | | 253 |
| 8 | 2019-01-03 | DIR | | В | Brand | ed | 208 | lers | | 119 | | | 973 |
| 9 | 2019-01-03 | DIR | | 0 | Other | | 200 | Fresh Vegetables | 132 | | 132 | | 608 |
| 10 | 2019-01-03 | DIR | | 0 | Other | | 204 | Fresh Fruit | | 22 | | 2 4 | |
| 11 | 2019-01-03 | INB | | В | Brand | ed | 200 | Fresh Vegetables | | 3 | 313 | 3 1,593 | |
| 12 | 2019-01-03 🐂 | | | | | d | 201 | Canned Fruit | | 2,1 | 109 | 12,616 | |
| 13 | 2019-01-03 | INB | . [| Dates in | | d | 202 | Pork | | 1 | 184 | 1, | ,183 |
| 14 | 2019-01-03 | INB | 10 | t Colum | 'n | bq | 203 | Beef | | 1 | 108 | | 601 |
| 15 | 2019-01-03 | INB | 15 | Colum | | ed | 204 | Fresh Fruit | | 3 | 319 | 1, | ,540 |
| 16 | 2019-01-03 | INB | | | | ed | 207 | Frozen Fruit Products | | | 85 | | 608 |
| 17 | 2019-01-03 | INB | _ | В | Brand | ed | 208 | Frozen Prepared Dinners | | 2 | 293 | 2, | ,570 |
| 18 | 2019-01-03 | INB | | 0 | Other | | 200 | Fresh Vegetables | | 1 | 113 | | 545 |
| 19 | 2019-01-03 | INB | | 0 | Other | | 204 | Fresh Fruit | | | 28 | | 65 |
| 20 | 2019-01-03 | INB | | Р | Private | e Label | 201 | Canned Fruit | | 1,6 | 675 | 7, | ,782 |
| 21 | 2019-01-03 | INW | | B | Brand | ed | 200 | Fresh Vegetables | | 4 | 461 | 2, | ,377 👻 |
| | E E | vents D | ata Fo | or POS | (+) | | | 1 | | | | | Þ |
| |] | | | | | | | | | | | + | 70% |

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.

| | | | Data Ma | apping - Data Im | port | | | |
|----------------------------------|---|----------------------------|--|-------------------------|---------------------------|-------------------------------|---------------|--------|
| Use the Config Description: O | O O Intration options and Mapping preview ptionally enter a description for this impor prime of the second s | to tell us how to treat do | ata for the import. ure use. Add Template | Configuration Delete C | ategory Data Before Impor | Mapping Controls At Top | | |
| Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | ▼ _ |
| | v | T | • | T | T | • | T | T |
| Days | Distribution Channel | Product Class | Description | Product Category | / Description | Sales Event 3 | Sales Event 4 | |
| 2019-01-03 | DIR | В | Branded | | 200 Fresh Vegetables | | 150 | 737 |
| 2019-01-03 | DIR | В | Branded | | 201 Canned Fruit | | 468 | 1,936 |
| 2019-01-03 | DIR | В | Branded | | 202 Pork | | 75 | 438 |
| 2019-01-03 | <u> </u> | В | Branded | | 203 Beef | | 87 | 493 |
| 2019-01-03 | | В | Branded | | 204 Fresh Fruit | | 224 | 931 |
| 2019-01-03 | Header Row | В | Branded | | 207 Frozen Fruit Produc | s | 42 | 253 |
| 2019-01-03 | Erom Import | В | Branded | | 208 Frozen Prepared Dir | ners | 119 | 973 |
| 2019-01-03 | From import | 0 | Other | | 200 Fresh Vegetables | | 132 | 608 |
| 2019-01-03 | | 0 | Other | | 204 Fresh Fruit | | 22 | 45 |
| 2019-01-03 | IND | В | Branded | | 200 Fresh Vegetables | | 313 | 1,593 |
| 2019-01-03 | INB | В | Branded | | 201 Canned Fruit | | 2,109 | 12,616 |
| 2019-01-03 | INB | В | Branded | | 202 Pork | | 184 | 1,183 |
| 2019-01-03 | INB | В | Branded | | 203 Beef | | 108 | 601 |
| 2019-01-03 | 2019-01-03 INB B Branded | | Branded | | 204 Fresh Fruit | | 319 | 1,540 |
| 2019-01-03 INB B | | Branded | | 207 Frozen Fruit Produc | S | 85 | 608 | |
| 2019-01-03 | INB | В | Branded | | 208 Frozen Prepared Dir | ners | 293 | 2,570 |
| 2019-01-03 | INB | 0 | Other | | 200 Fresh Vegetables | | 113 | 545 |
| 2019-01-03 | INB | 0 | Other | | 204 Fresh Fruit | | 28 | 65 |

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.

| | | | Data M | lappin | g - Data Impo | rt | | | | | | |
|----------------------|--|---------------------------|---------------------|----------|-----------------------|----------|-------------------------|-----|-----------------|-------|-----------------|----------|
| 000 | 0 | | | | | | | | | | | |
| Use the Configurat | tion options and Mapping preview to | tell us how to treat dat | a for the import. | | | | M | apr | ping | | | |
| | | | | | | | | | lione | | | |
| Description: Adding | g historical Point of Sales Data | | | Configur | ation 🗌 Delete Catego | ory Data | Before Impor | lec | lions | | | |
| | | | | | | | | | | | | |
| Click Process to imp | port your data or click Add Template first | to save mapping for futur | e use. Add Template | | | | | | | | | |
| Date | ▼ Dimension | ▼ Dimension | ▼ Ignore | • | Dimension | • | Ignore | T | Measure | • | Measure | v |
| 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 | В | Branded | | | 200 | Fresh Vegetables | | | 150 | | 737 |
| 2019-01-03 | DIR | В | Branded | | | 201 | Canned Fruit | | | 468 | | 1,936 |
| 2019-01-03 | DIR | В | Branded | | | 202 | Pork | | | 75 | | 438 |
| 2019-01-03 | DIR | В | Branded | | | 203 | Beef | | | 87 | • | 493 |
| 2019-01-03 | DIR | В | Branded | | | 204 | Fresh Fruit | | | 224 | | 931 |
| 2019-01-03 | DIR | В | Branded | | | 207 | Frozen Fruit Products | | | 42 | | 253 |
| 2019-01-03 | DIR | В | Branded | | | 208 | Frozen Prepared Dinners | | | 119 | | 973 |
| 2019-01-03 | DIR | 0 | Other | | | 200 | Fresh Vegetables | | | 132 | | 608 |
| 2019-01-03 | DIR | 0 | Other | | | 204 | Fresh Fruit | | | 22 | | 45 |
| 2019-01-03 | INB | В | Branded | | | 200 | Fresh Vegetables | | | 313 | | 1,593 |
| 2019-01-03 | INB | В | Branded | | | 201 | Canned Fruit | | | 2,109 | | 12,616 |
| 2019-01-03 | INB | В | Branded | | | 202 | Pork | | | 184 | ł | 1,183 |
| 2019-01-03 | INB | В | Branded | | | 203 | Beef | | | 108 | | 601 |
| 2019-01-03 | INB | В | Branded | | | 204 | Fresh Fruit | | | 319 | | 1,540 |
| 2019-01-03 | INB | В | Branded | | | 207 | Frozen Fruit Products | | | 85 | | 608 |
| 2019-01-03 | INB | В | Branded | | | 208 | Frozen Prepared Dinners | | | 293 | | 2,570 |
| 2019-01-03 | INB | 0 | Other | | | 200 | Fresh Vegetables | | | 113 | | 545 |
| 2019-01-03 | INP | 0 | Othor | | | 20/ | Froch Fruit | | | 20 | | CE. |

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.

| Auto | Save 💽 o | <u>ଇ</u> ମୁନ୍ଦୁ | Impo | ort Sales For Future I | orecasting Tin | ne Serie | s.xlsx - Save | ed | - | • • | | ĸ |
|---------------|----------|--------------------|------------------|------------------------------|------------------------------|----------|---------------|------------------|------------|--------------|------------|----|
| File | Home | Insert Page I | ayout Formulas | Data Review | View Ad | d-ins | Help PI | DF | ACROBAT Te | eam 🔎 Tell i | me 🖻 🖓 | I |
| 130 | Ŧ | : × 🗸 | f_x | | | | | | | | | ¥ |
| | А | В | D | | | E | | F | G | Н | | |
| 1 | | | | | | | Sales | | Sales | Sales | Sales | |
| 1 | | | | | | | November | | December | January | February | |
| 3 R | epBroker | Description | Customer Ship-To | Des | cription | < | 2020-11-0 | 01 | 2020-12-01 | 2021-01-01 | 2021-02-01 | ノ |
| 4 300 | | Nicole Toscano | 101100BEWO | Wilder Foods St | Louis MO WO | 3 | 9(| 3,474 | 88,850 | 103,857 | 108,389 | |
| 5 300 | | Nicole Tosc | 101106JEWO | Wilder Foods St | Louis MO WO. | J | 84 | 4,127 | 79,965 | 93,471 | 97,550 | |
| 6 300 | | <u> </u> | 101106IEWO | Wilder Foods St | Louis MO WO | | 79 | 9,453 | 75 522 | 88,278 | 92,130 | |
| 7 300 | | Hondor | 101106 | Wilder Foods St Louis MO | | | 71 | 7,50 | | 82,518 | 89,402 | |
| 8 300 | ` | neauer | 101106HEWO | Wilder Foods St | Louis MO WO | H | 74 | 4,78 | Dates in | 83,086 | 86,711 | |
| 9 300 | | Rows | 101106GEWO | Wilder Foods St | Louis MO WO | G | 70,10 | | 3rd Row | 77,893 | 81,292 | |
| 10 300 | | | 101106FEWO | Wilder Foods St Louis MO WOF | | F | 6 | 5,43: | | 72,700 | 75,872 | |
| 11 300 | _ | NICOLE LOSCANO | 101106EEWO | Wilder Foods St | Louis MO WO | E | 60 | 0,758 | | 67,507 | 70,453 | |
| 12 300 | | Nicole Toscano | 101103BEWO | Wilder Foods Bu | ffalo NY WOB | | 56 | 6,185 | 56,133 | 64,276 | 63,827 | 1 |
| 13 300 | | Nicole Toscano | 101106DEWO | Wilder Foods St | Louis MO WO | D | 56 | 6,085 | 53,310 | 62,314 | 65,033 | |
| 14 300 | | Nicole Toscano | 101106CEWO | Wilder Foods St | Louis MO WO | C | 51 | 1,411 | 48,867 | 57,121 | 59,614 | 1 |
| 15 300 | | Nicole Toscano | 101103JEWO | Wilder Foods Bu | ffalo NY WOJ | | 50 | 0,566 | 50,519 | 57,848 | 57,445 | Ļ |
| 16 300 | | Nicole Toscano | 101103IEWO | Wilder Foods Bu | ffalo NY WOI | | 47 | 7,757 | 47,713 | 54,635 | 54,253 | 1 |
| 17 300 | | Nicole Toscano | 101106AEWO | Wilder Foods St | Louis MO WO | 4 | 46 | 6,737 | 44,425 | 51,928 | 54,194 | 1 |
| 18 300 | | Nicole Toscano | 101106KEWO | Wilder Foods St | Louis MO WO | K | 46 | 6,737 | 44,425 | 51,928 | 54,194 | 1 |
| 19 305 | | Janice Tierney | 101117BEWO | Harrington's St L | ouis MO WOB | | 25 | 5,915 | 27,152 | 29,843 | 29,796 | 1 |
| 20 305 | | Janice Tierney | 101117JEWO | Harrington's St L | Harrington's St Louis MO WOJ | | | 3,324 | 24,437 | 26,859 | 26,816 | - |
| 21 305 | | Janice Tierney | 101117IEWO | Harrington's St L | ouis MO WOI | | 22 | 2,028 | 23,079 | 25,366 | 25,327 | |
| - <u></u> 20E | U | se For Forecasting | | Harrington's St. | | 1 | | n 7991 | 21 701 | 07/1 | | |
| 1 | | | | | | | | | | | + 70% | 16 |

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.

| | | | | | Data Mapping | j - Data Import | | | | | | | |
|-------------------------------|--|---|------------------|---------|-----------------------|-----------------|------------|--------|------------|------------|--|--|--|
| Use the Configuration: Option | Click Process to Import your data or click Add Template first to save mapping for future use. Add Template | | | | | | | | | | | | |
| Ignore | ▼ Ignore | • | Ignore | ▼ Ignor | e v | Ignore 🔻 | Ignore | • | Ignore 🔻 | Ignore 🔻 | | | |
| | T | T | | V | • | | | | τ | τ | | | |
| | | | | | | Sales | Sales | | Sales | Sales | | | |
| | | | | | | November | December | | January | February | | | |
| RepBroker | Description | | Customer Ship-To | Descr | iption | 2020-11-01 | 2020-12-01 | | 2021-01-01 | 2021-02-01 | | | |
| | 300 Nicole Toscano | | 101106BEWO | wilder | FOODS ST LOUIS MO WOB | 93,47 | 4 | 88,850 | 103,857 | 108,389 | | | |
| | 300 Nicole Toscano | | 101106JEWO | Wilder | Foods St Louis MO WOJ | 84,12 | 7 | 79,965 | 93,471 | . 97,550 | | | |
| | 300 Nicole Toscano | | 101106IEWO | Wilder | Foods St Louis MO WOI | 79,45 | 3 | 75,522 | 88,278 | 92,130 | | | |
| | | | 101106 | Wilder | Foods St Louis MO | 77,50 | 1 | 70,586 | 82,518 | 89,402 | | | |
| | 3 Header | | 101106HEWO | Wilder | Foods St Louis MO WOH | 74,78 | 0 | 71,080 | 83,086 | 86,711 | | | |
| | Bowe From | | 101106GEWO | Wilder | Foods St Louis MO WOG | 70,10 | 6 | 66,637 | 77,893 | 81,292 | | | |
| | Rows FIOIII | | 101106FEWO | Wilder | Foods St Louis MO WOF | 65,43 | 2 | 62,195 | 72,700 | 75,872 | | | |
| | Import | | 101106EEWO | Wilder | Foods St Louis MO WOE | 60,75 | 8 | 57,752 | 67,507 | 70,453 | | | |
| | <u> </u> | J | 101103BEWO | Wilder | Foods Buttalo NY WOB | 56,18 | 5 | 56,133 | 64,276 | 63,827 | | | |
| | 300 Nicole Toscano | | 101106DEWO | Wilder | Foods St Louis MO WOD | 56,08 | 5 | 53,310 | 62,314 | 65,033 | | | |
| | 300 Nicole Toscano | | 101106CEWO | Wilder | Foods St Louis MO WOC | 51,41 | 1 | 48,867 | 57,121 | 59,614 | | | |
| | 300 Nicole Toscano | | 101103JEWO | Wilder | Foods Buttalo NY WOJ | 50,56 | 6 | 50,519 | 57,848 | 57,445 | | | |
| | 300 Nicole Toscano | | 101103IEWO | Wilder | Foods Buttalo NY WOI | 47,75 | / | 47,713 | 54,635 | 54,253 | | | |
| | 300 Nicole Toscano | | 101106AEWO | Wilder | Foods St Louis MO WOA | 46,73 | / | 44,425 | 51,928 | 54,194 | | | |
| | 300 Nicole Toscano | | 101106KEWO | Wilder | Foods St Louis MO WOK | 46,73 | 7 | 44,425 | 51,928 | 54,194 | | | |

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 | Mapping | - Data Import | | | | | | | | |
|---------------------|---|-----------------------------------|--------------------------------|-------------------|---------------|--------------------------|----------------------|----------------------|----------------------|--|--|--|--|--|
| 000 | • | | | | | | Ma | nning | | | | | | |
| Use the Configura | the Configuration options and Mapping preview to tell us how to treat data for the import. Selections | | | | | | | | | | | | | |
| | | | | | | | Sele | ctions | | | | | | |
| Description: Impo | rting units d | lata for Forecasting work | | | Configuration | Delete Category Data Bel | ore Import | | | | | | | |
| Click Process to im | nport your da | ata or click Add Template first t | o save mapping for future use. | Add Template | | | | | | | | | | |
| Dimension | • | Ignore | Dimension | Ignore | • | Measure 🔻 | Measure 🗸 | Measure 🔻 | Measure 🔻 | | | | | |
| RepBroker | • | | Customer Ship-To | | • | User Forecast Unit 4 | User Forecast Unit 4 | User Forecast Unit 4 | User Forecast Unit 4 | | | | | |
| | | | | | | Sales | Sales | Sales | Sales | | | | | |
| | | | | | | November | December | January | February | | | | | |
| RepBroker | | Description | Customer Ship-To | Description | | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 | | | | | |
| | 300 | Nicole Toscano | 101106BEWO | Wilder Foods St L | ouis MO WOB | 93,47 | 4 88,85 | 0 103,857 | 108,389 | | | | | |
| | 300 | Nicole Toscano | 101106JEWO | Wilder Foods St L | ouis MO WOJ | 84,12 | 7 79,96 | 5 93,471 | 97,550 | | | | | |
| | 300 | Nicole Toscano | 101106IEWO | Wilder Foods St L | ouis MO WOI | 79,45 | 3 75,52 | 2 88,278 | 92,130 | | | | | |
| | 300 | Nicole Toscano | 101106 | Wilder Foods St L | ouis MO | 77,50 | 1 70,58 | 6 82,518 | 89,402 | | | | | |
| | 300 | Nicole Toscano | 101106HEWO | Wilder Foods St L | ouis MO WOH | 74,78 | 71,08 | 0 83,086 | 86,711 | | | | | |
| | 300 | Nicole Toscano | 101106GEWO | Wilder Foods St L | ouis MO WOG | 70,10 | 66,63 | 7 77,893 | 81,292 | | | | | |
| | 300 | Nicole Toscano | 101106FEWO | Wilder Foods St L | ouis MO WOF | 65,43 | 2 62,19 | 5 72,700 | 75,872 | | | | | |
| | 300 | Nicole Toscano | 101106EEWO | Wilder Foods St L | ouis MO WOE | 60,75 | 3 57,75 | 2 67,507 | 70,453 | | | | | |
| | 300 | Nicole Toscano | 101103BEWO | Wilder Foods Buf | falo NY WOB | 56,18 | 5 56,13 | 3 64,276 | 63,827 | | | | | |
| | 300 | Nicole Toscano | 101106DEWO | Wilder Foods St L | ouis MO WOD | 56,08 | 5 53,31 | 0 62,314 | 65,033 | | | | | |
| | 300 | Nicole Toscano | 101106CEWO | Wilder Foods St L | ouis MO WOC | 51,41 | 48,86 | 7 57,121 | . 59,614 | | | | | |
| | 300 | Nicole Toscano | 101103JEWO | Wilder Foods Buf | falo NY WOJ | 50,56 | 5 50,51 | 9 57,848 | 3 57,445 | | | | | |
| | 300 | Nicole Toscano | 101103IEWO | Wilder Foods Buf | falo NY WOI | 47,75 | 7 47,71 | 3 54,635 | 5 54,253 | | | | | |
| | 300 | Nicole Toscano | 101106AEWO | Wilder Foods St L | ouis MO WOA | 46,73 | 7 44,42 | 5 51,928 | 54,194 | | | | | |
| | 300 | Nicole Toscano | 101106KEWO | Wilder Foods St L | ouis MO WOK | 46,73 | 7 44,42 | 5 51,928 | 54,194 | | | | | |
| | 305 | lanice Tierney | 1011178EWO | Harrington's St L | DUIS MO WOR | 25.91 | 5 2715 | 29.84 | 29.796 | | | | | |

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 <u>Data Import</u> <u>Initial Setup Checklist</u>. 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 7.4 or greater. If they are not, obtain the necessary software and upgrade as you have in the past using the separate Viewer/Connector install/upgrade guide for instructions.
- The Stratum.Viewer implementation must have a valid license for the Stratum Analyst Hub. If you want to have <u>Data Steward</u> functionality and if you plan to import from local SQL Server databases or Azure cloud sources, you also need a Stratum Cloud Import license. If you don't have these licenses, contact your Silvon Sales Representative at (800) 874-5866 or email us at <u>info@silvon.com</u>.
- 4. Verify that you have proper authority defined for the Viewer Impersonation Account. For example, the account requires a SQL Server Server Role of bulkadmin on the server where the Stratum.Server database and Stratum.Viewer database reside. Details about all of the required authority for the account are in the "Installation Requirements" document.

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 System Configuration Settings -
 - Verify a registration key for the Stratum Analyst Hub is specified in the Stratum Analyst Hub section of the System Configuration. Data Import is part of the Stratum Analyst Hub.
 - A registration key for Stratum Cloud Import is required if you want to have Data Steward functionality and if you plan to import from local SQL Server databases or Azure cloud sources. The key needs to be entered in the Stratum Cloud Import section of the System Configuration window.
 - Specify an upload file location for Data Imports using the provided field in the Process Options section of the System Configuration window. Copies of import data files are stored in that location. Import files are your Microsoft Excel files, CSV, Text, or other types of source files that contain imported data. See <u>Specify</u> <u>Upload Location</u>.
 - This task only applies if your environment is licensed for Stratum Cloud Import and you are setting things up so users can import from Azure cloud sources and/or local SQL Server database tables. In the System Configuration window, use the applicable fields in the Cloud Import Locations section to enter the connection details for each of the sources you plan on using for Data Imports.*

*Note: Existing knowledge and experience with Azure is required when setting up Stratum to do imports from Azure cloud sources. Use your knowledge of your Azure implementation to determine the appropriate URL, connection string, and folder details to copy from Azure into the connection detail fields within Viewer.

 In the System Generated Emails section of the System Configuration window, specify an email for the "Email From Address" property. It acts as the "From" email for Data Import generated emails. No emails will be sent if this property is left blank. If your environment is a hosted environment, you should use <u>No-Reply@silvoncloud.com</u> as the Email From Address.

- Set up "Process Completed" and "Process Failed" email properties for Data Import processing notifications. This includes specifying email addresses of administrators who need to receive processing notifications, the email subject, and the email body text.
- Stratum.Viewer Category Control Categories that will be the Target of Data Imports need to be specified as 'Enhanced' Categories. Only measures belonging to those categories can have data imported into them via Data Import, either by users or Data Stewards. See <u>Make Categories Available For Use With Data Import</u>.
- Stratum.Viewer Data Steward Designations If you will have Security Administrators acting as Data Stewards for your implementation, update their user profiles by enabling the Data Steward option. <u>See Enable</u> <u>Data Steward Features For Security Administrators</u>.
- 4. Stratum.Connector Missing Members Setting In the Stratum.Connector Parameter Settings window, verify that the Add Missing Members parameter is selected (the default state is selected). When selected, Connector processes can check for and add missing Master File records that are needed to support Data Import features.

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 Available For Use With Data Import Functionality

Categories that will be the Target of Data Imports need to have an 'Enhanced' data architecture and a Data Controlled By status of User or Data Steward. Only measures belonging to those categories can have data imported into them via Data Import functionality in Stratum. Viewer. All measures belonging to an Enhanced category can be potential Target measures for imports. Target measures are the ones that receive the imported data.

Note: See the checklist in this document for complete details about steps for setting up things to support Data Import functionality.

- 1. Click Manage Things then Category from the main menu in the top panel of Stratum
- 2. In the Category window, change the Architecture to Enhanced.
- 3. Then, choose with User or Data Steward to control which users can import data into the category.
 - If set to Data Steward, only Security Administrators with a Data Steward designation can import data to that • category.
 - If set to User, anyone with access to using Data Import can import data to that category.
- 4. Save 📩 your changes

Enable Data Steward Features For Security Administrators

- 1. Click Manage Things then User Profile from the main menu in the top panel of Stratum.
- 2. Select the security administrator's user profile in the User Profile list window and click Edit
- 3. Select the Data Steward checkbox for the administrator see the Accessibility section of the User Profile Maintenance window.
- 4. Save the changes.

Enter Connection Details For Stratum Cloud Import Locations

This setup step only applies if your environment is licensed for Stratum Cloud Import and you are setting things up so users can import from Azure cloud sources and/or local SQL Server database tables. In the System Configuration window, use the applicable fields in the Cloud Import Locations section to enter the connection details for each of the sources you plan on using for Data Imports.*

*Note: Existing knowledge and experience with Azure is required when setting up Stratum to do imports from Azure cloud sources. Use your knowledge of your Azure implementation to determine the appropriate URL, connection string, and folder details to copy from Azure into the connection detail fields within System Configuration.

- 1. Click Manage Things then System Configuration from the main menu in the top panel of Stratum.
- 2. Scroll to the Process Options section of the System Configuration window.
- 3. Use the applicable sections to enter the connection details for each of the specialty sources you plan on using for Data Imports:
 - Azure Blob Container enter Folder Name and Signature details.
 - Azure File Share enter Folder Name and Signature details.
 - Azure SQL Database Enter the Connection String.
 - Local SQL Server Database Enter the Connection String.
- 4. Save 🖿 the changes.

Specify Upload File Location For Data Imports

- 1. Click Manage Things then System Configuration from the main menu in the top panel of Stratum.
- 2. Scroll to the Data Imports properties in the Process Options section of the System Configuration window.
- Use the Data Import Upload File Location 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 Data Steward or 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\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 – Excel, CSV, Text Data Source

Here's the steps for setting up a data import that uses an Excel spreadsheet, CSV file, or text file as its source of data.

- 1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.
- 2. In the <u>Data Import list window</u>, click New ¹. If your implementation is set up to use other types of imports, a menu will display when you click New. Click the Local File option.
- 3. When prompted, choose the Excel, CSV, or text file with the data to import. Then click Open.
- 4. If a Template Selection window displays templates that are a match for your category of import data, you can choose a template that handles configuration and mapping for you.
 - a. Choose a template and click Preview to review the applied template, then go to Step 7.
 - b. Or, choose a template and click Process to proceed with processing the import and skip previewing it.
 - c. Or, choose None then click Preview to proceed without using a template. Go to Step 5 of finish setting up the import.

OR

4. If an <u>Import Configuration window</u> displays, select the Target category for the import and make other selections to begin telling Data Import about the data in the file. Then proceed to Step 5. 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.

- a. For imports from an Excel file spreadsheet, choose the Format 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.
 - **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.
- **b.** For imports from a CSV or Text file Specify the Delimiter and Field Quote used for the file. These file types are always in Transactions format so that option doesn't have to be specified here.
- 5. Use the <u>Data Mapping window</u> to finish setting up the import details, such as mapping that tells Stratum where to import the dimensions and measure data from the import file.
 - a. Description Enter information to describe the import.
 - b. Delete Category Data Before Import Select this option to clear all existing data from ALL measures of the Target category before the new data is imported. If left deselected, imported data is added to existing measure data.

- c. **Mapping –** Use the provided drop-down lists to tell Stratum about the date format of data and which measures to import data to.
 - Ignore For any columns you don't want considered, select Ignore.
 - **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).
 - **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.
- 6. {Optional} To save these configuration and mapping details for reuse with future imports for this category of data, click Add Template and set up the template. Save your template, then go to Step 7.
- 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 C icon.

Add a Data Import – SQL Server Database Data Source

Here's the steps for setting up a data import that uses a local SQL Server database table as its source of data.

- 1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.
- 2. In the <u>Data Import list window</u>, click New then click the SQL Server Database option.
- 3. When prompted, choose the table with the data to import. Then click OK.
- 4. If a <u>Template Selection window</u> displays templates that are a match for your category of import data, you can choose a template that handles configuration and mapping for you.
 - a. Choose a template and click Preview to review the applied template, then go to Step 7.
 - b. Or, choose a template and click Process to proceed with processing the import and skip previewing it.
 - c. Or, choose None then click Preview to proceed without using a template. Go to Step 5 of finish setting up the import.

OR

 If an <u>Import Configuration window</u> displays, select the Target category for the import.. Then proceed to Step 5. 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.

- 5. Use the <u>Data Mapping window</u> to finish setting up the import details, such as mapping that tells Stratum where to import the dimensions and measure data from the import file.
 - a. Description Enter information to describe the import.

- b. Delete Category Data Before Import Select this option to clear all existing data from ALL measures of the Target category before the new data is imported. If left deselected, imported data is added to existing measure data.
- c. **Mapping –** Use the provided drop-down lists to tell Stratum about the date format of data and which measures to import data to.
 - Ignore For any columns you don't want considered, select Ignore.
 - **Date** –In the column containing dates, select the format associated with the import file's dates.
 - **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.
- 6. {Optional} To save these configuration and mapping details for reuse with future imports for this category of data, click Add Template and set up the template. Save your template, then go to Step 7.
- 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.

Add a Data Import – Azure Cloud Data Source

Here's the steps for setting up a data import that uses an Excel, CSV, or text file as its source of data.

- 1. Click Analyst Tools then Data Import from the main menu in the top panel of Stratum.
- 2. In the <u>Data Import list window</u>, click New then click the type of Azure source. Options depend on what's been configured for your implementation either Azure Blob Container, Azure File Share, or Azure SQL Database.
- 3. When prompted, choose the file or table in your Azure source that has the data to import. Then click OK.
- 4. If a Template Selection window displays with templates that are a match for your category of import data, you can choose a template that handles configuration and mapping for you.
 - a. Choose a template and click Preview to review the applied template, then go to Step 7.
 - b. Or, choose a template and click Process to proceed with processing the import and skip previewing it.
 - c. Or, choose None then click Preview to proceed without using a template. Go to Step 5 of finish setting up the import.

OR

4. If an <u>Import Configuration window</u> displays, select the Target category for the import and make other selections to begin telling Data Import about the data in the file. Then proceed to Step 5. 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.

- a. For imports from an Azure SQL Database table You only have to choose the Target Category and then can go to Step 5.
- b. For imports from an Excel file spreadsheet, choose the Format Transactions 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.

- **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.
- **c.** For imports from a CSV or Text file Specify the Delimiter and Field Quote used for the file. These file types are always in Transactions format so that option doesn't have to be specified here.
- 5. Use the <u>Data Mapping window</u> to finish setting up the import details, such as mapping that tells Stratum where to import the dimensions and measure data from the import file.
 - a. **Description –** Enter information to describe the import.
 - b. **Delete Category Data Before Import** Select this option to clear all existing data from ALL measures of the Target category before the new data is imported. If left deselected, imported data is added to existing measure data.
 - c. **Mapping –** Use the provided drop-down lists to tell Stratum about the date format of data and which measures to import data to.
 - Ignore For any columns you don't want considered, select Ignore.
 - **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).

*Note: Time Series imports are only applicable to Excel spreadsheet imports, which can be either a Transactions or Time Series format. All other import sources have data in Transactions format only.

- **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.
- 6. {Optional} To save these configuration and mapping details for reuse with future imports for this category of data, click Add Template and set up the template. Save your template, then go to Step 7.
- 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 O icon.

Add a Data Import Template

When you are adding a new data import, you can optionally set up a <u>template</u> that saves mapping and configuration details for re-use with future imports. Steps are listed below.

- 1. Once you've set up configuration and mapping details for an import you're adding, click Add Template.
- 2. Give the template a name and description.

Note: This description is different that the import description. For each import that uses the template, you can use the Description field on its Data Import Mapping window to give the import a unique description.

- 3. Set the Type to Personal or Global. Global templates can be used by other data import users. Personal templates are meant only for your use.
- 4. Decide whether or not to use the Delete Category Data Before Import option. Select it if you want to have all existing data from ALL measures of the Target category to be cleared before the new data is imported. If left deselected, imported data is added to existing measure data.
- 5. Decide whether or not to use the Allow Schema Drift and Continue Processing option. This property tells Stratum how to treat changes to the import file / table that do not match the template's data mapping details.
 - It's selected by default which means the import will adapt to differences between your template mapping and what's in your import file / table. Processing will continue if there are differences. Data Import will use automatic mapping logic when new columns / fields are added in the import file / table that didn't exist when the template mapping was originally set up. Also, if non-essential columns are missing or removed from your source file / table, the import will continue processing.
 - Deselect this option if you don't want to allow imports to proceed when there is a difference between the import file / table and the template data mapping. If differences are found, the Data Import will end in an error. You will need to change the format of the source data or use a different template. Use this option if you want to be aware of any changes to your import files / tables.
- 6. Review the read-only sections that summarize your configuration and mapping options. If you need to change something, cancel adding the template, make your changes, and begin again with Step 1 to add a template.
- 7. Save your template.
- 8. Data Imports are meant to be processed after you are done setting them up and setting up their template. 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 unless you have selected a template for your import. If you are using a template and want to customize mappings, detach the template by clicking the 'x' next to the template name.

Configuration

Change the description and property that controls if existing Category is cleared before the import.

- **Description –** Enter information to describe the import.
- Delete Category Data Before Import Select this option to clear all existing data from ALL measures of the Target category before the new data is imported. If left deselected, imported data is added to existing measure data.

To adjust other details, 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.

- For all import types including local SQL Server Databases and Azure SQL Databases, you can change the Target Category. You will need to redo mapping details for measures.
- For imports from an Excel file spreadsheet Change the Format if needed. 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 are in the import file. 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 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.

• For imports from a CSV or Text file – Change the Delimiter and Field Quote used for the file. These file types are always in Transactions format so that option doesn't have to be specified here.

Mapping

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

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

*Note: Time Series imports are only applicable to Excel spreadsheet imports, which can be either a Transactions or Time Series format. All other import sources have data in Transactions format only.

- **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.

Delete a Data Import

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

Delete a Data Import Template

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

Edit a Data Import Template

Note that editing a template might change its compatibility with files / tables you've already used it with for importing. See Step 3d for more details.

- 1. Click Analyst Tools then Data Import Template from the main menu in the top panel of Stratum.
- 2. In the Data Import Templates list window, select the template you need to edit.
- 3. Change the editable properties as needed:

a. Name or Description.

Note: This description is different that the import description. For each import that uses the template, you can use the Description field on its Data Import Mapping window to give the import a unique description.

- b. **Type** Global templates can be used by other data import users. Personal templates are meant only for your use.
- c. Decide whether or not to use the **Delete Category Data Before Import** option. Select it if you want to have all existing data from ALL measures of the Target category to be cleared before the new data is imported. If left deselected, imported data is added to existing measure data.
- d. Decide whether or not to use the **Allow Schema Drift and Continue Processing** option. This property tells Stratum how to treat changes to the import file / table that do not match the template's data mapping details.
 - Selected means the import will adapt to differences between your template mapping and what's in your import file / table. Processing will continue if there are differences. Data Import will use automatic mapping logic when new columns / fields are added in the import file / table that didn't exist when the template mapping was originally set up. Also, if non-essential columns are missing or removed from your source file / table, the import will continue processing.
 - Deselect it if you don't want to allow imports to proceed when there is a difference between the import file / table and the template data mapping. If differences are found, the Data Import will end in an error. You will need to change the format of the source data or use a different template. Use this option if you want to be aware of any changes to your import files / tables.
- 4. Save your template.

Process a Data Import

Data imports are processed from the Data Mapping window or Data Import Template Selection window.

1. If you're working in the Data Mapping window and are done setting up or previewing your import, click the

Submit The Data Import For Processing victor in its mapping window. A message will display asking you to confirm you want to proceed with the import. Click OK to proceed.

OR

1. If a Data Import Template Selection window displays to show you templates that match your category of import data, you can choose a template and click Process. The window will close, and a message will display over the Data Mapping window asking you to confirm you want to proceed with the import. Click OK to proceed. If you don't want to use a template to process the import, click the None option then preview – this takes you to the Data Mapping window, where you can process the import as described in the first option above.

Import File Setup & Examples

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

One way to set up your Excel spreadsheet 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 <u>How It Works: Stratum Data Import</u> and the topic <u>Excel Import File Types: Transactions</u> <u>Or Time Series</u>. Note that Transactions format is the only option for other file types or tables used for your imports (CSV, Text, local SQL Server Database, Azure SQL Database).

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 Excel Import for full detail about how to set up an import file.

| | | Off H | 」 り・ | | | Sales Event | Transactions 20 |)19-10-16.xlsx - Saved | | | 3 – C × |
|----|------------|----------|----------------|------------------|---------|-------------|---------------------|------------------------|-----|---------------|---------------|
| 1 | File Hom | e Insert | Page | Layout Fo | ormula | s Data F | Review View | Add-ins Help PD | FA | CROBAT Team | 오 Tell me 🖻 🖓 |
| 17 | '05 | - | × | f _x | | | | | | | ~ |
| | ٨ | | 2 | C | | D | E | E | | G | |
| 1 | Days | Distrik | oution nnel | Product Class | De | scription | Product Category | Description | | Sales Event 3 | Sales Event 4 |
| 2 | 2019-01-03 | DIR | t | 3 | Brande | ed | 200 | esin vegetables | | 15 | 737 |
| 3 | 2019-01-03 | DIR | E | В | Brande | ed | 201 | C ed Fruit | | 46 | 8 1,936 |
| 4 | 2019-01-03 | DIR | E | В | Brande | ed | 202 | | | 7 | 5 438 |
| 5 | 2019-01-03 | DIR | E | В | Brande | ed | 203 | 1 Header | | 8 | 7 493 |
| 6 | 2019-01-03 | DIR | E | В | Brande | ed | 204 | Row | | 22 | 4 931 |
| 7 | 2019-01-03 | DIR | E | В | Brande | ed | 207 | NOW . | | 4: | 2 253 |
| 8 | 2019-01-03 | DIR | E | В | Brande | ed | 208 | | ers | 11 | 9 973 |
| 9 | 2019-01-03 | DIR | (| 0 | Other | | 200 | Fresh Vegetables | | 13 | 2 608 |
| 10 | 2019-01-03 | DIR | (| 0 | Other | | 204 | Fresh Fruit | | 2 | 2 45 |
| 11 | 2019-01-03 | INB | 16 | В | Brande | ed | 200 | Fresh Vegetables | | 31 | 3 1,593 |
| 12 | 2019-01-03 | tra | | | | d | 201 | Canned Fruit | | 2,10 | 9 12,616 |
| 13 | 2019-01-03 | INB | ı D | ates in | | d | 202 | Pork | | 18 | 1,183 |
| 14 | 2019-01-03 | INB | 1st | Colum | nn l | ed . | 203 | Beet | | 10 | 8 601 |
| 15 | 2019-01-03 | INB | | ooran | ··· | bd | 204 | Fresh Fruit | | 31 | 1,540 |
| 10 | 2019-01-03 | INB | | | Drande | ed ad | 207 | Frozen Fruit Products | | 8 | 0 008 |
| 1/ | 2019-01-03 | | 1 | | Othor | a | 208 | Frozen Prepared Dinne | ers | 29 | 2,070 |
| 10 | 2019-01-03 | | | 0 | Other | | 200 | Fresh Vegetables | | 2 | 5 545 65 |
| 18 | 2019-01-03 | | | 5 D | Drivate | Label | 204 | Canned Eruit | | 167 | 5 7 792 |
| 21 | 2019-01-03 | INW | | R | Brande | - Laber | 200 | Fresh Vegetables | | 46 | 1 2 377 - |
| 21 | 2010-01-03 | Events D | ata For | POS | + | | 200 | | | 40 | 2,311 |
| | | | | | | | | | | | + 70% |

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 | | ም 🛛 እ. | | Sales Ev | en | t Transactions 20 | 19-10-16.xlsx - Excel | | Ē | × |
|------|------------|-------------------------|------------------|---------------|----|---------------------|-------------------------|----------|---------|---------------|
| Fi | le Home | e Insert Page | Layout Fo | ormulas Data | F | Review View | Add-ins Help PDF A | ACROBAT | Team 🔎 | D Tell me |
| 170 |)5 | - : × · | fx | | | | | | | ~ |
| | ٨ | в | C | D | | F | F | | G | н |
| 1 | Days | Distribution Channel | Product Class | Description | | Product Category | Description | Sales | Event 3 | Sales Event 4 |
| 2 2 | 2019-01-03 | DIR | В | Branded | | 200 | Fresh Vegetables | | 150 | 737 |
| 3 2 | 2019-01-03 | DIR | В | | | 201 | Canned Fruit | | 468 | 1,936 |
| 4 2 | 2019-01-03 | DIR | B Din | nension | | 202 | Pork | | 75 | 438 |
| 5 2 | 2019-01-03 | DIR | В | | | 203 | Beef | | 87 | 493 |
| 6 2 | 2019-01-03 | DIR | В | alues | | 204 | Fresh Fruit | | 224 | 931 |
| 7 2 | 2019-01-03 | DIR | В | p. 0.1000 | J | 207 | Frozen Fruit Producto | | 42 | 253 |
| 8 2 | 2019-01-03 | DIR | В | Branded | | 208 | Frozen Prepa | | 119 | 973 |
| 9 2 | 2019-01-03 | DIR | 0 | Other | | 200 | Fresh Vegeta | sure | 132 | 608 |
| 10 2 | 2019-01-03 | DIR | 0 | Other | | 204 | Fresh Fruit Valu | les | 22 | 45 |
| 11 2 | 2019-01-03 | INB | В | <u> </u> | | 200 | Fresh Vegeta | | 313 | 1,593 |
| 12 2 | 2019-01-03 | INB | B Din | ansion | | 201 | Canned Fruit | | 2,109 | 12,616 |
| 13 2 | 2019-01-03 | INB | в | | | 202 | Pork | | 184 | 1,183 |
| 14 2 | 2019-01-03 | INB | в V | alues | | 203 | Beef | | 108 | 601 |
| 15 2 | 2019-01-03 | INB | В | | | 204 | Fresh Fruit | | 319 | 1,540 |
| 16 2 | 2019-01-03 | INB | | Branded | | 207 | Frozen Fruit Products | | 85 | 608 |
| 17 2 | 2019-01-03 | INB 🥌 | В | Branded | | 208 | Frozen Prepared Dinners | | 293 | 2,570 |
| 18 2 | 2019-01-03 | INB | 0 | Other | | 200 | Fresh Vegetables | | 113 | 545 |
| 19 2 | 2019-01-03 | INB | 0 | Other | | 204 | Fresh Fruit | | 28 | 65 |
| 20 2 | 2019-01-03 | INB | P | Private Label | | 201 | Canned Fruit | | 1,675 | 7,782 |
| 21 2 | 2019-01-03 | VINW | В | Branded | | 200 | Fresh Vegetables | | 461 | 2,377 |
| 4 | Þ | Events Data Fo | r POS | (+) | | | : • | <u> </u> | | |
| Read | dy 🔝 | | | | | | | | ─ | + 70% |

2. Open File & Set Up Import Properties

An import starts with choosing the Excel file.

| ← → · · ↑ Organize · New folder This PC ↑ Name ↑ Date modified ↓ 10/31/2019 3:51 PM ↓ Inport Sales For Future Forecasting Time Series.xlsx ↓ 10/31/2019 8:26 A | < |
|--|-------|
| Organize • New folder Image: Comparison of the second se | |
| This PC Name Date modified Import Sales For Future Forecasting Time Series.xlsx 10/31/2019 3:51 PM Import Sales For Future Forecasting Time Series.xlsx 10/18/2019 8:26 A |) |
| Import Sales For Future Forecasting Time Series.xlsx 10/31/2019 3:51 PM Import Sales For Future Forecasting Time Series.xlsx 10/18/2019 8:26 A | ybe |
| Import Sales For Future Forecasting Time Series.xlsx 10/18/2019 8:26 A | ile |
| Color Functions 2010 10 10 10 ultra 10/10/2010 0:00 DM | ∕lici |
| Sales Event Transactions 2019-10-16.xisx 10/16/2019 9:03 PM | Лісі |
| UCD Daily ShipTo Region Territory Transactions For zu 9xlsx 10/16/2019 7:21 PM | ۸ici |
| | |
| | |
| | |
| | |
| Uindows (C:) | > |
| | Í |
| File name: Sales Event Transactions 2019-10-16.xlsx Victors Vi | |
| Open Cancel | |

As the file is uploaded, you get prompted to configure the import. This is where you pick the <u>Target category</u> 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.

| Import Configuration | × |
|---------------------------------------|------|
| Source Of Data For Import: Local File | |
| Source Type: Excel | |
| Target Category: User POS | |
| Format: Transactions 🗸 | |
| Header Rows In File: 1 | |
| Row That Contains Transaction Date: | |
| Transaction Date Format: | ~ |
| OK Cancel | Help |

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.

| | | Data Mapping | g - Data Import | | |
|--|----------------------|---------------|-----------------|------------------|-------------------------|
| Use the Configuration option Description: Optionally enter a Click Process to import your da | Before Import | | | | |
| Ignore 🗸 🔻 | Ignore 🔻 | Ignore 🔻 | Ignore 🗸 🗸 | Ignore 🗸 | Ignore 🔻 📥 |
| The second secon | τ | T | T | T | v |
| Days | Distribution Channel | Product Class | Description | Product Category | Description |
| 2019-01-03 | DIK | D | branueu | 200 | Fresh vegetables |
| 2019-01-03 | DIR | В | Branded | 201 | Canned Fruit |
| 2019-01-02 | DID | В | Branded | 202 | Pork |
| 2019-0 | 0 | В | Branded | 203 | Beef |
| 2019-0 Header Row | From | В | Branded | 204 | Fresh Fruit |
| 2019-0 dmport File, | Always | В | Branded | 207 | Frozen Fruit Products |
| 2019-0 Shaded In (| Green | В | Branded | 208 | Frozen Prepared Dinners |
| 2019-0: | Siccil | 0 | Other | 200 | Fresh Vegetables |
| 2019-01 0 | 0 | 0 | Other | 204 | Fresh Fruit |
| 2019-01-03 | INB | В | Branded | 200 | Fresh Vegetables |
| 2019-01-03 | INB | В | Branded | 201 | Canned Fruit |
| 2019-01-03 | INB | В | Branded | 202 | Pork |
| 2019-01-03 | INB | В | Branded | 203 | Beef |
| 2019-01-03 | INB | В | Branded | 204 | Fresh Fruit |
| 2019-01-03 | INB | В | Branded | 207 | Frozen Fruit Products |
| 2019-01-03 | INB | В | Branded | 208 | Frozen Prepared Dinners |

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.

Data Mapping - Data Import

0000

Use the Configuration options and Mapping preview to tell us how to treat data for the import.

| Description: Optionally e | Description: Optionally enter a description for this import Configuration Delete Category Data Before Import | | | | | | | | | | | |
|--|--|---------------|-------------|---|------------------|------------|------------------|--|--|--|--|--|
| Click Process to import your data or click Add Template first to save mapping for future use. Add Template | | | | | | | | | | | | |
| Ignore | ▼ Ignore | ▼ Ignore | ▼ Ignore | • | Ignore | ▼ Ignor | e 🔻 🔺 | | | | | |
| Dimension | | T | T | • | | T | • | | | | | |
| Date | Distribution Channel | Product Class | Description | | Product Category | Descr | iption | | | | | |
| Ignore | DIR | В | Branded | | | 200 Fresh | Vegetables | | | | | |
| 2019-01-03 | IR | В | Branded | | | 201 Canne | d Fruit | | | | | |
| 2019-01-03 | D IR | В | Branded | | | 202 Pork | | | | | | |
| 2019-01-03 | u IR | В | Branded | | | 203 Beef | | | | | | |
| 2019-01-03 | D IR | В | Branded | | | 204 Fresh | Fruit | | | | | |
| 2019-01-03 | D IR | В | Branded | | | 207 Frozen | Fruit Products | | | | | |
| 2019-01-03 | D IR | В | Branded | | | 208 Frozen | Prepared Dinners | | | | | |
| 2019-01-03 | u IR | 0 | Other | | | 200 Fresh | Vegetables | | | | | |
| 2019-01-03 | DIR | 0 | Other | | | 204 Fresh | Fruit | | | | | |
| 2019-01-03 | INB | В | Branded | | | 200 Fresh | Vegetables | | | | | |
| 2019-01-03 | INB | В | Branded | | | 201 Canne | d Fruit | | | | | |
| 2019-01-03 | INB | В | Branded | | | 202 Pork | | | | | | |

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

| | Data Mapping - Data Import | | | | | | | | | | | |
|---|--|---|-----------------------------|------------------------|-----------------------------|--|--|--|--|--|--|--|
| Jise the Configuration options and Mapping preview to tell us how to treat data for the import. | | | | | | | | | | | | |
| Description: Optiona | ally enter a description for this import | | | Configuration Delete C | Category Data Before Import | | | | | | | |
| Click Process to impo | ort your data or click Add Template fin | st to save mapping for future u | co Add Tomplato | | | | | | | | | |
| Date | ▼ Dimension | Dimension | ▼ Ignore | ▼ Dimension | ▼ Ignore ▼ | | | | | | | |
| yyyy-mm-dd | Distribution Channel | Product Class | T | Product Category | • • | | | | | | | |
| Days | Distribution Channel | Product Promotion | | C tegor | y Description | | | | | | | |
| 2019-01-03 | DIR | Product Purchasing UN | 1 | | 200 Fresh Vegetables | | | | | | | |
| 2019-01-03 | DIR | Product User Controlle | d Buyer | | 201 Canned Fruit | | | | | | | |
| 2019-01-03 | DIR | Product Brand | | | 202 Pork | | | | | | | |
| 2019-01-03 | DIR | Product Category | | | 203 Beef | | | | | | | |
| 2019-01-03 | DIR | Product Category Role | | | 204 Fresh Fruit | | | | | | | |
| 2019-01-03 | DIR | Product Class | | | 207 Frozen Fruit Products | | | | | | | |
| 2019-01-03 | DIR | Product Class Oser Cor | trolled PClas Department | | 208 Frozen Prepared Dinners | | | | | | | |
| 2019-01-03 | DIR | Product Class User Cor | trolled PClas Promotion Co | de | 200 Fresh Vegetables | | | | | | | |
| 2019-01-03 | DIR | Product Family | | | 204 Fresh Fruit | | | | | | | |
| 2019-01-03 | INB | Product Group | -tu-llad DC- Madatian Ca | | 200 Fresh Vegetables | | | | | | | |
| 2019-01-03 | INB | Product Group User Co Droduct Group User Co | ntrolled PGrp Marketing Co | ae | 201 Canned Fruit | | | | | | | |
| 2019-01-03 | INB | Product Group Oser CC Dreduct SubClass | nuolleu PGIp Sales Division | | 202 Pork | | | | | | | |
| 2019-01-03 | INB | Product Subcidss | | | 203 Beef | | | | | | | |
| 2019-01-03 | INB | Product Type Product Type Short De | scription | | 204 Fresh Fruit | | | | | | | |
| 2019-01-03 | INB | Region | scription | | 207 Frozen Fruit Products | | | | | | | |
| 2019-01-03 | INB | RepBroker | | | 208 Frozen Prepared Dinners | | | | | | | |
| 2019-01-03 | INB | Rep Broker State | | | 200 Fresh Vegetables | | | | | | | |
| 2019-01-03 | INB | RepBroker Type | | | 204 Fresh Fruit | | | | | | | |
| 2019-01-03 | INB | Sales Director | | | 201 Canned Fruit | | | | | | | |
| 2019-01-03 | INW | Sales Director Town | | - | 200 Fresh Vegetables | | | | | | | |

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.

| | | | Data Mapp | ing | g - Data Import | | | | | |
|---------------------------|------------------------------|-----------------|----------------------------|------|-------------------------|------|---------------------------|------|----------------|--------|
| Use the Configuration of | options and Mapping pre | view to tel | l us how to treat data fo | r th | e import. | | | | | |
| Description: Optionally e | enter a description for this | import | | | Con | figu | ration Delete Category Da | ta E | efore Import | |
| Click Process to import y | our data or click Add Temp | late first to s | save mapping for future us | e. / | Add Template | | | | | |
| Dimension | ▼ Ignore | ▼ | Dimension | • | Ignore | 6 | Measure | , | easure | • |
| Product Class | • | • | Product Category | ¥ | | , | - Select a Target - | 1 | Jer POS Unit 4 | • |
| Product Class | Description | | Product Category | | Description | | User POS Amt 1 | S | ales Event 4 | |
| } | Branded | | | 200 | Fresh Vegetables | Т | User POS Amt 2 | | | 737 |
| | Branded | | | 201 | Canned Fruit | | User POS Amt 3 | | | 1,936 |
| | Branded | | | 202 | Pork | | User POS Amt 4 | | | 438 |
| | Branded | | | 203 | Beef | Т | User POS Unit 1 | | | 493 |
| | Branded | | | 204 | Fresh Fruit | | User POS Unit 2 | | | 931 |
| } | Branded | | | 207 | Frozen Fruit Products | | User POS Unit 3 | | | 253 |
| 1 | Branded | | | 208 | Frozen Prepared Dinners | | User POS Unit 4 | | | 973 |
|) | Other | | | 200 | Fresh Vegetables | | | 2 | | 608 |
|) | Other | | | 204 | Fresh Fruit | | 2 | 22 | | 45 |
| } | Branded | | | 200 | Fresh Vegetables | | 3: | 13 | | 1,593 |
| 1 | Branded | | | 201 | Canned Fruit | | 2.1(| 19 | | 12 616 |

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.

| | | Data Ma | pping - | · Data Imp | oort | |
|--|---|---|------------------------|---------------|---------|----------------|
| Jse t Submit The Data | Import For Processing review | ı to tell us how to treat da | ta for the in | nport. | | |
| Description: Point of Sa | les Units Data | | | | Configu | ration 🗆 Del |
| Click Process to import | your data or click Add Template fi | irst to save mapping for futu | re use. Add | Template | | |
| Dimension | ▼ Ignore | ▼ Dimension | ▼ Igi | nore | T | Measure |
| Product Class | • | Product Category | T | | ▼ | User POS Uni |
| Product Class | Description | Product Category | De | scription | | Sales Event |
| В | Branded | | 200 Fre | sh Vegetables | | |
| В | Branded | | 201 Car | nned Fruit | | |
| В | Branded | | 202 Por | k | | |
| В | Branded | | 203 Bee | ef | | |
| - 日りひ1 | >↓ | ta Import Has Completed | - Message | e 🖻 | -// | |
| ーロックロイ File Message | N ↓ ₹ A Stratum Dat Help Acrobat Ç | ta Import Has Completed | - Message ant to do | e 🖻 | - | o x |
| File Message | L = A Stratum Dat Help Acrobat Q | ta Import Has Completed Tell me what you wa | - Message ant to do | | -// | □ X 7:03 PM |
| E タ ひ 1 File Message KF A Stratu | L = A Stratum Dat Help Acrobat ♀ um Data Import Has Col | ta Import Has Completed Tell me what you wa mpleted | - Message | | - | □ × 7:03 PM |

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

| | ★ Specialty Sales Event POS Analysis | | | | | | | | | | | |
|-------------------|--|-----------------------|-------------------------|------------|-------------------|-------------------------|-----------------|------------------------|-----------------------------------|--|--|--|
| | 🕞 🖸 🕅 🚔 🍙 📊 🔍 💡 🔯 🍸 🛂 🍞 Show All 🗟 OOOOO 1 to 50 of 2088 🕼 OOOOO 1 to 3 of 3 | | | | | | | | | | | |
| Rows: Columns: | ∷ <u>Year: 2019</u> × | II <u>Days: All</u> × | > II Distribution Chann | nel: All × | ★) II <u>Pro</u> | duct Class: All 🗙 🕽 | Product Catego | r <u>y: All</u> × ≯ ⊞I | • + | | | |
| View Filter: | + | | | | | | | | | | | |
| <u>Year Days</u> | Distribution Channel | Product Class | PClas Long Description | Product | <u>t Category</u> | PCat Long Description | User POS Unit 3 | User POS Unit 4 | Existing Sales, Other Channels | | | |
| 2019 January 3 | DIR | B | Branded | <u>200</u> | | Fresh Vegetables | 150 | 737 | 6,208 | | | |
| | | | | <u>201</u> | | Canned Fruit | 468 | 1,936 | 16,826 | | | |
| | | | | 202 | | | 75 | 438 | 3,593 | | | |
| | | | | <u>203</u> | | mnorted | 87 | 493 | 4,060 | | | |
| | | | | <u>204</u> | Data | In Views | 224 | 931 | 8,088 | | | |
| | | | | 207 | Data | | 42 | 203 | 2,003 | | | |
| | | 0 | Other | 200 | | | 132 | 608 | 5 181 | | | |
| | | <u>×</u> | | 204 | | Fresh Fruit | 22 | 45 | 470 | | | |
| | INB | В | Branded | 200 | | Fresh Vegetables | 313 | 1,593 | 13,344 | | | |
| | | | | <u>201</u> | | Canned Fruit | 2,109 | 12,616 | 103,073 | | | |
| | | | | 202 | | Pork | 184 | 1,183 | 9,566 | | | |
| | | | | <u>203</u> | | Beef | 108 | 601 | 4,964 | | | |
| | | | | <u>204</u> | | Fresh Fruit | 319 | 1,540 | 13,011 | | | |
| | | | | <u>207</u> | | Frozen Fruit Products | 85 | 608 | 4,847 | | | |
| | | | | <u>208</u> | | Frozen Prepared Dinners | 293 | 2,570 | 20,048 | | | |
| | | <u>0</u> | Other | <u>200</u> | | Fresh Vegetables | 113 | 545 | 4,605 | | | |

Excel 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 <u>How It Works: Stratum Data Import</u> and the topic <u>Excel Import File Types: Transactions</u> <u>Or Time Series</u>. This Time Series format is only available when using an Excel spreadsheet for your source of data. The Transactions format is another option for Excel imports and the only option for other file types or tables used for your imports (CSV, Text, local SQL Server Database, Azure SQL Database).

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.

| AutoSave Off 🗄 🎐 🤆 🤤 Imp | | | | | , → Imp | ort Sales Fo | r Future Forecasting Time | e Serie | s.xlsx - Saved | | • - | - 🗆 🗙 |
|--------------------------|--------|-----|----------------|---------------------|--------------------|-----------------------------------|------------------------------|----------|----------------|------------|------------|------------|
| Fil | e H | ome | Insert Pa | ige l | ayout Formulas | Data | Data -ins | | Help PDF | ACROBAT T | eam 🔎 Tell | me 🖻 🖓 |
| J25 🔹 : 🗙 🗸 | | fx | | Dates in 2nd Row | | | | | ~ | | | |
| | Α | | В | | С | | | | E | F | G | H |
| \square | | | | | | | November | December | January | February | | |
| 2 | | | | | | | | | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 |
| | RepBro | ker | Description | | Customer Ship-To | | Description | | Forecast | Forecast | Forecast | Forecast |
| 4 3 | 300 | | NICOLE LOSCANO | 1 | TUTTU6BEVVO | vvilder Fo | oas St fonis MO MOR | | 93,474 | 88,850 | 103,857 | 108,389 |
| 5 3 | 300 | | | | 101106JEWO | Wilder Fo | ods St Louis MO WOJ | | 84,127 | 79,965 | 93,471 | 97,550 |
| 6 3 | 300 | 3 | Header | | 101106IEWO | IEWO Wilder Foods St Louis MO WOI | | | | 75,522 | 88,278 | 92,130 |
| 7 3 | 300 | 1 | Deves | | 101106 | Wilder Fo | ods St Louis MO | | 77,501 | 70,586 | 82,518 | 89,402 |
| 8 3 | 300 | | Rows | | 101106HEWO | Wilder Fo | ods St Louis MO WOH | | 74,780 | 71,080 | 83,086 | 86,711 |
| 9 3 | 300 | | | | 101106GEWO | Wilder Fo | ods St Louis MO WOG | | 70,106 | 66,637 | 77,893 | 81,292 |
| 10 3 | 300 | _ | Nicole Toscano | | 101106FEWO | Wilder Fo | ods St Louis MO WOF | | 65,432 | 62,195 | 72,700 | 75,872 |
| 11 3 | 300 | | Nicole Toscano | | 101106EEWO | Wilder Fo | ods St Louis MO WOE | | 60,758 | 57,752 | 67,507 | 70,453 |
| 12 3 | 300 | | Nicole Toscano | | 101103BEWO | Wilder Fo | Vilder Foods Buffalo NY WOB | | 56,185 | 56,133 | 64,276 | 63,827 |
| 13 3 | 300 | | Nicole Toscano | | 101106DEWO | Wilder Fo | Vilder Foods St Louis MO WOD | | 56,085 | 53,310 | 62,314 | 65,033 |
| 14 3 | 300 | | Nicole Toscano | | 101106CEWO | Wilder Fo | Nilder Foods St Louis MO WOC | | 51,411 | 48,867 | 57,121 | 59,614 |
| 15 3 | 300 | | Nicole Toscano | | 101103JEWO | Wilder Foods Buffalo NY WOJ | | | 50,566 | 50,519 | 57,848 | 57,445 |
| 16 3 | 300 | | Nicole Toscano | | 101103IEWO | Wilder Fo | ods Buffalo NY WOI | | 47,757 | 47,713 | 54,635 | 54,253 |
| 17 3 | 300 | | Nicole Toscano | | 101106AEWO | Wilder Fo | ods St Louis MO WOA | | 46,737 | 44,425 | 51,928 | 54,194 |
| 18 3 | 300 | | Nicole Toscano | | 101106KEWO | Wilder Fo | ods St Louis MO WOK | | 46,737 | 44,425 | 51,928 | 54,194 |
| 19 3 | 305 | | Janice Tierney | | 101117BEWO | Harringtor | n's St Louis MO WOB | | 25,915 | 27,152 | 29,843 | 29,796 |
| 20 3 | 305 | | Janice Tierney | | 101117JEWO | Harringtor | n's St Louis MO WOJ | | 23,324 | 24,437 | 26,859 | 26,816 |
| 21 3 | 305 | | Janice Tierney | | 101117IEWO | Harringtor | n's St Louis MO WOI | | 22,028 | 23,079 | 25,366 | 25,327 |
| <u></u> | 005 | | Ionico Tiornov | | | Harringtor | | | 20 722 | 01 701 | 22 074 | 22 027 |
| | • | | se FOI FOIecas | sang | (+) | | | | | | | • |
| 1 | | | | | | | | | | | ── | + 70% |

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

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.

| AutoSave 💽 🛱 🏷 · 오구 - Impo | | | ort Sales For Futu | re Forecasting | Time Serie | es.xlsx - Saved | | 西 - | > | k | |
|----------------------------|---------------------------------------|---------------------|--------------------|----------------------|-----------------|-----------------|------------|-------------|------------|----------|-----|
| ł | File Home Insert Page Layout Formulas | | Data Review | w View | Add-ins | Help PDF | ACROBAT T | ieam 🔎 Tell | me 🖻 🖓 | 1 | |
| J2 | 25 · | × - ✓ | fx | | | | | | | | ٣ |
| | А | В | С | | D | | E | F | G | Н | |
| 1 | | | | | | | November | December | January | February | Н |
| 2 | | | | | | 2020-11-01 | 2020-12-01 | 2021-01-01 | 2021-02-01 | | |
| 3 | RepBroker | Description | Customer Ship-To | D | escription | | Forecast | Forecast | Forecast | Forecast | |
| 4 | 300 | Nicole Toscano | 101106BEWO | Wilder Foods | St Louis MO V | VOB | 93,47 | 4 88,850 | 103,857 | 108,389 | |
| 5 | 300 | lar i T | 1106JEWO | Wilder Foods | St Louis MO V | VOJ | 84,12 | 7 79,965 | 93,471 | 97,550 | L |
| 6 | 300 | Dimension | 1106IEWO | Wilder Foods | ds | | 79,45 | 3 75,522 | 88,278 | 92,130 | L I |
| 7 | 300 | Values | <u>)</u> 1106 | Wilder Foods Measure | | 77,50 | 1 70,586 | 82,518 | 89,402 | L L | |
| 8 | 300 | values | 01106HEWO | Wilder Foods | er Foods Values | | 74,78 | 71,080 | 83,086 | 86,711 | L I |
| 9 | 300 | | 01106GEWO | Wilder Foods | | | 70,10 | 66,637 | 77,893 | 81,292 | L I |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods | St Louis MO V | VOI | 65,43 | 2 62,195 | 72,700 | 75,872 | F I |
| 11 | 300 | Nicole Toscano | 101106EEWO | Wilder Foods | St Louis MO V | VOE | 60,75 | 3 57,752 | 67,507 | 70,453 | F |
| 12 | 300 | Nicole Toscano | 101103BEWO | Wilder Foods | Buffalo NY WO | ОВ | 56,18 | 5 56,133 | 64,276 | 63,827 | H |
| 13 | 300 | Nicole Toscano | 101106DEWO | Wilder Foods | St Louis MO V | VOD | 56,08 | 5 53,310 | 62,314 | 65,033 | F |
| 14 | 300 | | 101106CEWO | Wilder Foods | St Louis MO V | VOC | 51,41 | 1 48,867 | 57,121 | 59,614 | F |
| 15 | 300 | Dimension | 101103JEWO | Wilder Foods | Buffalo NY WO |) J | 50,56 | 50,519 | 57,848 | 57,445 | F |
| 16 | 300 | Values | 101103IEWO | Wilder Foods | Buffalo NY WC | | 47,75 | / 4/,/13 | 54,635 | 54,253 | F |
| 1/ | 300 | | 101106AEWO | Wilder Foods | St Louis MO V | | 46,73 | 7 44,425 | 51,928 | 54,194 | F |
| 18 | 300 | | 101106KEWO | Wilder Foods | St Louis MO V | VOK | 46,73 | 44,425 | 51,928 | 54,194 | r I |
| 19 | 305 | Janice Tierney | | Harrington's S | St Louis MO W | ОВ | 25,91 | 27,152 | 29,843 | 29,796 | r |
| 20 | 305 | Janice Tierney | | Harrington's 3 | St Louis MO W | | 23,32 | + 24,437 | 20,859 | 20,810 | r/ |
| 21 | 305 | Janice Tierney | | Harrington's 3 | St Louis MO W | | 22,02 | 23,079 | 20,300 | 20,327 | - |
| | | Jse For Forecasting | (+) | | | | | | | | 1 |
| | | | | | | | | | ─ | + 709 | % |

2. Open File & Set Up Import Properties

An import starts with choosing the Excel file.

| Open | | | | | × |
|--|--------|--|-------------------------------|------------------------|--------|
| $\leftarrow \rightarrow \checkmark \uparrow$ | | | ✓ Ŭ | | Q |
| Organize 🝷 New folder | | | | | ? |
| interview and the second secon | ^ | Name | | Date modified | Тур |
| 6 | | 1 | | 10/31/2019 3:51 PM | File |
| U | | Import Sales For Future Forecasting | Time Series.xlsx | 10/18/2019 8:26 A | Mic |
| | | Sales Event Transactions 2019-10-16 | 5.xlsx | 10/16/2019 9:03 PM | Mic |
| | | UCD Daily ShipTo Region Territory T | Fransactions For 2019.xls. | 10/16/2019 7:21 PM | Mic |
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| | | | Open | | |

As the file is uploaded, you get prompted to configure the import. This is where you pick the <u>Target category</u> 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.

| Import Configuration | × |
|--|------|
| Source Of Data For Import: Local File | |
| Source Type: Excel | |
| Target Category: User Forecast | |
| Format: Time Series 🗸 | |
| Header Rows In File: 3 | |
| Row That Contains Transaction Date: 2 | |
| Transaction Date Format: yyyy-mm-dd (2012-03-01) 🗸 | |
| OK Cancel | Help |

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.

| | | Data M | lapping · | · Data Impo | rt | | | |
|--|------------------------|--------------------------------|--------------|------------------|---|--------|------------|------------|
| Use the Configuration options and I Description: Optionally enter a descrip | Mapping preview to tel | l us how to treat data for the | import. | U: Prop Ya | se Mapping perties To Map pur Data To ratum Data | a Befo | ore Import | |
| | re | Ignore. | Id lemplate | | Ignore | Ŧ | Ianore 🗸 | Ianore |
| Tghore Tghore | | Ignord T | Ignore | | Ignore | | Tghore T | Ignore |
| | | | | · · | November | - | December | January |
| | | | | (| 2020-11-01 | | 2020-12-01 | 2021-01-01 |
| RepBroker Descri | ription | Customer Ship-To | Description | | Forecast | | Forecast | Forecast |
| 200 Nicolo | Toccore | 1011068520 | Wilder Feede | Ct Louis MO WOB | | 02,474 | 99,950 | |
| | - 5 | 101106JEWO | Wilder Foo | | | 84,127 | 79,965 | |
| | | 101106IEWO | Wilder Foo | Detect | | 79,453 | 75,522 | |
| Header Rows | From | 101106 | Wilder Foo | Dates I | | 77,501 | 70,586 | |
| Import File, Al | lways | 101106HEWO | Wilder Foo | 2nd Header | Row | 74,780 | 71,080 | |
| Shaded In G | ireen | 101106GEWO | Wilder Food | | | 70,106 | 66,637 | , |
| | | 101106FEWO | Wilder Foods | SE LOUIS MO WOF | | 65,432 | 62,195 | |
| | | 101106EEWO | Wilder Foods | St Louis MO WOE | | 60,758 | 57,752 | |
| 300 Nicole | Toscano | 101103BEWO | Wilder Foods | Buffalo NY WOB | | 56,185 | 56,133 | |
| 300 Nicole | Toscano | 101106DEWO | Wilder Foods | St Louis MO WOD | | 56,085 | 53,310 | |
| 300 Nicole | Toscano | 101106CEWO | Wilder Foods | St Louis MO WOC | | 51,411 | 48,867 | , |
| 300 Nicole | e Toscano | 101103JEWO | Wilder Foods | Buffalo NY WOJ | | 50,566 | 50,519 | |
| 300 Nicole | Toscano | 101103IEWO | Wilder Foods | Buffalo NY WOI | | 47,757 | 47,713 | |
| 300 Nicole | Toscano | 101106AFWO | Wilder Foods | St Louis MO WOA | | 46.737 | 44.425 | |

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.

| | | | Data Ma | opping - Data Impo | rt | | |
|--|--|---|--|---|---|---|---|
| | <u>_</u> | | | ipping baca inpr | | | |
| 000 | | | | | | | |
| se the Configural | tion options and Mapping prev | view to tell us how to treat (| data for the im | nport. | | | |
| | | | | | | | |
| Description: Option | nally enter a description for this in | mport | | Configuration | Delete Category Data Befo | re Import | |
| | | | | | | | |
| Click Process to imp | port your data or click Add Templa | ate first to save mapping for fu | iture use. Add T | Template | 1 | | |
| Ignore | ▼ Ignore | ▼ Ignore | ▼ Igr | nore 🔻 | Ignore 🔻 | Ignore 🗸 🗸 | Ignore |
| Dimension | | T | • | • | • | • | |
| Measure | 63 | | | | November | December | January |
| Ignore | | | | | 2020-11-01 | 2020-12-01 | 2021-01-01 |
| RepBroker | Description | Customer Ship-To | De De | escription | Forecast | Forecast | Forecast |
| | 300 Nicole Toscano | 101106BEWO | Wik | Ider Foods St Louis MO WOB | 93,474 | 88,850 | |
| | 300 Nicole Toscano | 101106JEWO | Wild | lder Foods St Louis MO WOJ | 84,127 | 79,965 | |
| | 300 Nicole Toscano | 101106IEWO | Wild | lder Foods St Louis MO WOI | 79,453 | 75,522 | |
| | 300 Nicole Toscano | 101106 | Wild | ilder Foods St Louis MO | 77,501 | 70,586 | |
| | 300 Nicole Toscano | 101106HEWO | Wild | lder Foods St Louis MO WOH | 74,780 | 71,080 | |
| | 300 Nicole Toscano | 101106GEWO | Wild | lder Foods St Louis MO WOG | 70,106 | 66,637 | |
| | 300 Nicole Toscano | 101106FEWO | Wild | ilder Foods St Louis MO WOF | 65,432 | 62,195 | |
| | 300 Nicole Toscano | 101106EEWO | Wild | Ider Foods St Louis MO WOE | 60,758 | 57,752 | |
| | | 101102PE\//O | Wilc | Ider Foods Buffalo NY WOB | 56,185 | 56,133 | |
| S C C | 300 Nicole Toscano | view to tell us how to treat | Data Ma | apping - Data Impo nport. | rt | | |
| Jee the Configurat Description: Optior Click Process to imp | 300 Nicole Toscano | view to tell us how to treat of mport | Data Ma data for the im | apping - Data Impo nport. Configuratio | n Delete Category Data Befo | ore Import | |
| Jee the Configural Description: Optior Click Process to Import | 300 Nicole Toscano | view to tell us how to treat a mport late first to save mapping for fu | Data Ma data for the im uture use. Add 1 | apping - Data Impo mport. Configuratio Template gnore V | n Delete Category Data Befor | ore Import Ignore V | Ignore |
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| Description: Option Click Process to import Click Process to import Demension - Select a Target - Product Group | 300 Nicole Toscano | view to tell us how to treat | Data Ma data for the im uture use. Add 1 V Igr | apping - Data Impo nport. Configuratio Template gnore V | n Delete Category Data Before | rre Import Ignore ▼ December | Ignore J January |
| Cick Process to imp immension - Select a Target - Product Group Product Group | 300 Nicole Toscano | view to tell us how to treat | Data Ma data for the im uture use. Add 1 V Igr | apping - Data Impo nport. Configuratio Template gnore V | Delete Category Data Before Ignore V November 2020-11-01 | Ignore ▼ December 2020-12-01 | Ignore January 2021-01-01 |
| Description: Option Click Process to imp Click Process to imp Product Group Product Group Us Product Group Us | 300 Nicole Toscano 300 Nicole Toscano ation options and Mapping prev ation options ations ation options ation options ation opt | view to tell us how to treat mport late first to save mapping for fu Ignore Ignore Ignore Ignore Ignore | Data Ma data for the im uture use. Add 1 V Igu | apping - Data Impo nport. Configuratio Template gnore V scription | n Delete Category Data Before Ignore V November 2020-11-01 Forecast | Ignore December 2020-12-01 Forecast | Ignore January 2021-01-01 Forecast |
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| Click Process to import immension Select a Target - Product Group Us Product Group Us Product Group Us Product SubClass Product SubClass Product Type Product Type Product Type Sho | 300 Nicole Toscano | view to tell us how to treat mport late first to save mapping for fu Ignore P P P V V V V V V V V V V V V V | Data Ma data for the im uture use. Add 1 V Igr D De Wile Wile Wile Wile | apping - Data Impo mport. Configuratio Template gnore V Sescription lider Foods St Louis MO WOB lider Foods St Louis MO WOJ lider Foods St Louis MO WOJ | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,127 79,453 | re Import Ignore ▼ December 2020-12-01 Forecast 88,855 79,965 75,522 | Ignore J January 2021-01-01 Forecast |
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| Se the Configurat Description: Option Click Process to imp Immension Select a Target - Product Group Us Product Group Us Product Group Us Product Group Us Product Type Sho Region RepBroker | 300 Nicole Toscano | introduction | Data Ma data for the im uture use. Add 1 Vila Do De Vila Wila Wila Wila Wila | apping - Data Impo nport. Configuratio Template gnore escription ilder Foods St Louis MO WOB ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,127 79,453 77,501 74,786 | Ignore ▼ December 2020-12-01 Forecast 88,850 79,965 75,522 70,586 75,522 70,586 71,086 71,086 | Ignore J January 2021-01-01 Forecast |
| Se the Configurat Description: Option Click Process to imp Immension Select a Target - Froduct Group Us Product Group Us Product Group Us Product Type Product Type Sho Region RepBroker State DesPenders Targe | 300 Nicole Toscano | introduction | Data Ma data for the im uture use. Add 1 V Igi D De With With With With With | Apping - Data Impo nport. Configuratio Template gnore V escription ilder Foods St Louis MO WOB ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOH ilder Foods St Louis MO WOH | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,122 79,453 77,501 74,780 70,100 | Ignore ▼ December 2020-12-01 Forecast 75,522 70,586 71,086 71,086 66,637 (1) 000 | Ignore January 2021-01-01 Forecast |
| Se the Configurat Set the Configurat Description: Option Click Process to imp Immension Select a Target - Product Group UB Product Group UB Product Group UB Product Group UB Product Type Sho Region RepBroker RepBroker Type Sales Director | 300 Nicole Toscano | view to tell us how to treat + mport late first to save mapping for ft Ignore Ignore ie r ship-Tc V W C V D V | Data Ma data for the im uture use. Add 1 Uture use. Vili U | apping - Data Impo | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,127 77,501 74,780 70,106 55,432 C 65,432 | Ignore ▼ December 2020-12-01 Forecast 79,965 75,522 70,586 71,080 66,637 66,637 62,195 7,7 | Ignore January 2021-01-01 Forecast |
| C C C C C C C C C C C C C C C C C C C | 300 Nicole Toscano | view to tell us how to treat of the first to save mapping for fu | Data Ma data for the im uture use. Add 1 Uuture use. Add 1 Uuture use. Add 1 Uuture use. Viii | apping - Data Impo mport. Configuratio Template gnore ♥ escription lider Foods St Louis MO WOB lider Foods St Louis MO WOI lider Foods St Louis MO WOI lider Foods St Louis MO WOI lider Foods St Louis MO WOH lider Foods St Louis MO WOH lider Foods St Louis MO WOF lider Foods St Louis MO WOF | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,127 79,453 77,501 74,786 77,501 665,432 60,758 66,758 6 | Ignore ▼ December 2020-12-01 Forecast 88,850 79,965 75,522 70,586 71,086 66,637 62,195 57,752 57, | Ignore January 2021-01-01 Forecast |
| Se the Configural Description: Option Click Process to imp Immension Select a Target - Product Group Us Product Group Us Product Group Us Product Group Us Product Group Us Product Type Product Type Product Type Product Type Sales Director Sales Director To Ship-To Market | 300 Nicole Toscano | view to tell us how to treat mport late first to save mapping for ft ↓ Ignore ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ ℓ | Data Ma data for the im uture use. Add 1 Uuture use. Add 1 Uuture use. Add 1 Uuture use. Vili Uuture use. Vilii Uuture use. Vilii Use. Vilii Use. Vilii Use. Viliii Use. Vili | apping - Data Impo mport. Configuratio Template gnore ♥ escription lider Foods St Louis MO WOB lider Foods St Louis MO WOI lider Foods St Louis MO WOG lider Foods St Louis MO WOF lider Foods St Louis MO WOF lider Foods St Louis MO WOF lider Foods St Louis MO WOF | n Delete Category Data Before Ignore ▼ November 2020-11-01 Forecast 93,474 84,127 79,453 77,501 74,786 77,501 65,432 60,758 56,685 56,685 56,685 56,685 | Jgnore ▼ Jgnore ▼ 2020-12-01 Forecast 88,855 79,965 75,522 70,586 71,086 66,633 62,195 57,755 35,513 55,314 55,314 | Ignore January 2021-01-01 Forecast |
| Se the Configural Description: Option Click Process to imp Immension Select a Target - Product Group Product Group Product Group US Product Group US Product Group US Product Type Product Type Product Type Product Type Sales Director To Sales Director To Ship-To Market Ship-To Market C | 300 Nicole Toscano | view to tell us how to treat | Data Ma data for the im uture use. Add 1 Uuture us | apping - Data Impo mport. Configuratio Template gnore ♥ escription lider Foods St Louis MO WOB lider Foods St Louis MO WOI lider Foods St Louis MO WOG lider Foods St Louis MO WOF lider Foods St Louis MO WOF lider Foods St Louis MO WOF lider Foods St Louis MO WOF | n Delete Category Data Before Ignore ▼ November 2020-11-01 Forecast 93,474 84,127 79,453 77,501 74,780 70,100 65,432 60,758 56,185 56,1 | Ignore ▼ December 2020-12-01 Forecast 88,855 79,965 75,522 70,586 71,080 66,633 62,199 57,752 56,133 53,310 48,855 48,855 48,855 53,310 48,855 53,310 48,855 53,310 54,310 54, | Ignore J January 2021-01-01 Forecast |
| Cick Process to imp Description: Option Click Process to imp Emension - Select a Target - Product Group Us Product Group Us Product Group Us Product Group Us Product Type Product Type Sho Region RepBroker Type Sales Director Ship-To Market Chip-To Region | 300 Nicole Toscano | Introduction | Data Ma data for the im uture use. Add 1 Uture use. Add 1 Uture use. Add 1 Uture use. Vili | apping - Data Impo nport. Configuratio Template gnore escription lider Foods St Louis MO WOB lider Foods St Louis MO WOI lider Foods St Louis MO WOI lider Foods St Louis MO WOI lider Foods St Louis MO WOG lider Foods St Louis MO WOE lider Foods St Louis MO WOE | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,127 79,453 77,501 74,780 70,100 65,143 51,411 55,648 55,048 51,411 55,548 55,048 51,411 55,548 55,048 55 | Ignore ▼ December 2020-12-01 Forecast 75,522 70,586 71,080 66,633 62,199 57,752 56,133 53,310 48,865 56,133 53,310 66,653 56,133 55,135 56,155 56, | Ignore January 2021-01-01 Forecast |
| Description: Option Description: Option Click Process to imp Product Group Us Product Group Us Product Group Us Product Group Us Product Group Us Product Type Product Type Sho Region RepBroker Type Sales Director Sales Director To Ship-To Market C Ship-To Region Ship-To Territory | 300 Nicole Toscano | introduction | Data Ma data for the im uture use. Add 1 Uuture us | apping - Data Impo nport. Configuratio Template gnore escription ilder Foods St Louis MO WOB ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOI ilder Foods St Louis MO WOG ilder Foods St Louis MO WOF ilder Foods St Louis MO WOE ilder Foods St Louis MO WOE | n Delete Category Data Before Ignore V November 2020-11-01 Forecast 93,474 84,122 79,453 77,501 74,780 70,100 65,433 60,758 56,188 56,085 51,441 50,566 47,757 | Ignore ▼ December 2020-12-01 Forecast 75,522 2020-12-01 Forecast 71,080 66,637 62,199 57,755 57,555 56,133 53,310 48,867 50,519 50,51 | Ignore January Z021-01-01 Forecast |

•

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.

| | | D | ata Mapping - Data | a Import | | |
|---------------------|---------------------------------|---|----------------------|-----------------------------|-------------------------|----------------------|
| | ontions and Manning | proview to tell us how to treat dat: | a for the import | | | |
| ose the comgut | and happing | | for the import | | | |
| Description: Optio | nally enter a description for t | nis import | | Configuration Delete Catego | ry Data Before Import | |
| Click Process to in | nport your data or click Add Te | mplate first to save mapping for future | e use. Add Template | | | |
| • | Dimension | ▼ Ignore ▼ | Measure V | Measure | Measure 🗸 🗸 | leasure 🔻 |
| • | Customer Ship-To | v v | User Forecast Unit 4 | User Forecast Unit 4 | - Select a Target - 🛛 🔻 | Jser Forecast Unit 4 |
| | | | November | December | User Forecast Amt 1 | February |
| | | | 2020-11-01 | 2020-12-01 | User Forecast Amt 2 | 2021-02-01 |
| 1 | Customer Ship-To | Description | Forecast | Forecast | User Forecast Amt 3 | Forecast |
| ino | 101106BEWO | Wilder Foods St Louis MO WOB | 93,474 | 4 88,85 | User Forecast Amt 4 | 108,389 |
| ino | 101106JEWO | Wilder Foods St Louis MO WOJ | 84,122 | 7 79,96 | User Forecast Unit 1 | 97,550 |
| ino | 101106IEWO | Wilder Foods St Louis MO WOI | 79,453 | 75,52 | User Forecast Unit 2 | 92,130 |
| ino | 101106 | Wilder Foods St Louis MO | 77,50 | 70,58 | User Forecast Unit 3 | 89,402 |
| ino | 101106HEWO | Wilder Foods St Louis MO WOH | 74,780 | 71,08 | User Forecast Unit 4 | 86,711 |
| ino | 101106GEWO | Wilder Foods St Louis MO WOG | 70,100 | 66,637 | 77,033 | 81,292 |
| ino | 101106FEWO | Wilder Foods St Louis MO WOF | 65,432 | 62,195 | 72,700 | 75,872 |
| ino | 101106EEWO | Wilder Foods St Louis MO WOE | 60,758 | 3 57,752 | 67,507 | 70,453 |
| ino | 101103BEWO | Wilder Foods Buffalo NY WOB | 56,185 | 5 56,133 | 64,276 | 63,827 |
| | 10110005000 | wilder Freder Of Lewis MO WOD | FC 001 | 52.210 | (2.214 | CE 022 |

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.

| | | D | ata Mapping - Data | a Import | | | |
|--|----------------------------------|---------------------------------------|------------------------|-----------------------------|------------------|--|--|
| Sin C 6 | O Data Import For Processing | evew to tell us how to treat data | a for the import. | | | | |
| Description: Addin | g Forecast Details To Data Hub | | C | Configuration Delete Catego | ry Data | | |
| Click Process to im | port your data or click Add Temp | late first to save mapping for future | e use. Add Template | | | | |
| • | Dimension V | Ignore 🗸 | Measure V | Measure V | Measu | | |
| • | Customer Ship-To | ▼ | User Forecast Unit 4 | User Forecast Unit 4 | User Fo | | |
| | | | November | December | Januar | | |
| 2 | Customer Shin-To | Description | 2020-11-01 Forecast | 2020-12-01 Forecast | 2021-0 Foreca | | |
| no | 101106BEWO | Wilder Foods St Louis MO WOB | 93,474 | 88,850 | rorcca | | |
| ino | 101106JEWO | Wilder Foods St Louis MO WOJ | 84,127 | 79,965 | | | |
| no | 101106IEWO | Wilder Foods St Louis MO WOI | 79,453 | 75,522 | | | |
| File Me | ssage Help Acro | bat Q Tell me what | you want to do | | | | |
| KF | | | | 7: | 35 PM | | |
| A : | Stratum Data Import | Has Completed | | | ~ | | |
| Your Stratum Data Import has completed. Your data is ready to be used in Viewer. | | | | | | | |

| | ★ Monthly Forecasting Scenarios Next 4 Months | | | | | | | | | |
|----------------|--|------------------|----------------------------------|-----------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|--|--|
| | X 🖹 🛋 🝙 | | Q 123 | 0 | Show Al | 00091 to | 50 of 225 | 🕽 🚺 1 to 4 of 4 | | |
| Rov Columr | vs: ∷ <u>RepBroker: All</u> ns: + | × | i <u>hip-To: All</u> × > II Prod | luct Bran | d× + | | | | | |
| View Filt | er: + | | | | | | | | | |
| <u>RepBrok</u> | er RepBr Long Descriptior | Customer Ship-To | ShpTo Long Descr | ption | User Forecast Unit 4 Nov 2020 | User Forecast Unit 4 Dec 2020 | User Forecast Unit 4 Jan 2021 | User Forecast Unit 4 Feb 2021 | | |
| <u>300</u> | Nicole Toscano | 101103BEWO | Wilder Foods Buffalo N | (WOB | 56,185 | 56,133 | 64,276 | 63,827 | | |
| | | 101103IEWO | Wilder Foods Buffalo N | WOI | 47,757 | 47,713 | 54,635 | 54,253 | | |
| | | 101103JEWO | W | rom | 50,566 | 50,519 | 57,848 | 57,445 | | |
| | | <u>101106</u> | Use Imported |) | 77,501 | 70,586 | 82,518 | 89,402 | | |
| | | 101106AEWO | Data In Views | D WOM | 46,737 | 44,425 | 51,928 | 54,194 | | |
| | | 101106BEWO | | D WOB | 93,474 | 88,850 | 103,857 | 108,389 | | |
| | | 101106CEWO | | woc | 51,411 | 48,867 | 57,121 | 59,614 | | |
| | | 101106DEWO | Wilder Foods St Louis N | | 56,085 | 53,310 | 62,314 | 65,033 | | |
| | | 101106EEWO | Wilder Foods St Louis N | IO WOE | 60,758 | 57,752 | 67,507 | 70,453 | | |
| | | 101106FEWO | Wilder Foods St Louis N | 10 WOF | 65,432 | 62,195 | 72,700 | 75,872 | | |
| | | 101106GEWO | Wilder Foods St Louis N | 10 WOG | 70,106 | 66,637 | 77,893 | 81,292 | | |
| | | 101106HEWO | Wilder Foods St Louis N | IO WOH | 74,780 | 71,080 | 83,086 | 86,711 | | |
| | | 101106IEWO | Wilder Foods St Louis N | IO WOI | 79,453 | 75,522 | 88,278 | 92,130 | | |
| | | 101106JEWO | Wilder Foods St Louis N | 10 WO: | 84,127 | 79,965 | 93,471 | 97,550 | | |
| | | 101106KEWO | Wilder Foods St Louis N | IO WOK | 46,737 | 44,425 | 51,928 | 54,194 | | |
| | | 300 Tota | ıl | | 961,108 | 917,979 | 1,069,361 | 1,110,360 | | |
| <u>301</u> | Patrick Hurley | <u>101132</u> | Prestwick Brothers Pho | enix | 13,403 | 7,116 | 9,038 | 9,996 | | |
| | | 101132BCTH | Prestwick Brothers Pho | enix THB | 8,946 | 3,596 | 6,536 | 6,100 | | |
| | | 101132BEWO | Prestwick Brothers Pho | nix WOR | 7.750 | 2 2 2 1 | 5 153 | 377.5 | | |

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

Tips For Setting Up Your Excel Imports

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

Note: If you're using CSV or text files or tables in SQL databases as the source of your import, see the topic <u>Tips</u> For Using Other Types Of Import Sources.

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.

| Save As | | | × |
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| File name: Sales-Receipts-OneOff-Event.xlsx | | | \sim |
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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.

| | A | В | С | D | E | F | |
|----|--------------|----------------|---------------------|----------------------------|----------------|---------------|---|
| 1 | Date | Ship-To Region | Ship-To Territory | STerr Long Description | Daily Sales \$ | Daily Sales # | ŀ |
| 2 | 2018-12-30 | 50 | 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 Dates | 1101 | South Central | \$8,326 | 1,538 | |
| 7 | 2018-12-30 | 52 | 1106 | Great Plains | \$5,382 | 992 | |
| 8 | 2018-12-30 | F | 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 | |
| | Data T | o Import + | F | | | | |

• Dates - Dates are transactional details about your import.
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, 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.

| | А | В | С | 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 | Dimension | \$8,326 | 1,538 | | |
| 7 | 2018-12-30 | 52 | 1106 | Values | \$5,382 | 992 | | |
| 8 | 2018-12-30 | 53 | 1100 | Doutimeat | \$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 | - | |
| 4 | A Data To Import + | | | | | | | |

• **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.

| | Α | В | С | 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 Measure | \$5,382 | 992 |
| 8 | 2018-12-30 | 53 | 1100 | Southwest Values | \$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 |
| | Data T | o Import (+) | P | | | |

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

- For imports where dates are in every row (known as a <u>Transactions type import</u>), 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 <u>Time Series type import</u>), 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 identify 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.

| 1 | <u>A</u> | B | C | | D | E | F S | |
|----|----------------|----------------|-------------------|-----|--------------------------|----------------|---------------|--|
| 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 | | at Lakes | \$1,535 | 257 | |
| 4 | 2018-12-30 | 51 | 1102 | G | | \$4,956 | 877 | |
| 5 | 2018-12-30 | 51 | 1103 | М | Descriptive Header | \$5,347 | 988 | |
| 6 | 2018-12-30 | 52 | 1101 | Sc | Row Aids You In | \$8,326 | 1,538 | |
| 7 | 2018-12-30 | 52 | 1106 | Gr | Mapping | \$5,382 | 992 | |
| 8 | 2018-12-30 | 53 | 1100 | Sc | | \$3,715 | 600 | |
| 9 | 2018-12-30 | 53 | 1107 | No | rthwest | \$3,508 | 604 | |
| 10 | 2018-12-30 | 54 | 1111 | Ea | stern Atlantic Provinces | \$8,742 | 1,594 | |
| 11 | 2018-12-30 | 55 | 1108 | We | estern Provinces | \$4,010 | 755 | |
| 12 | 2018-12-30 | 55 | 1109 | Ce | ntral Provinces | \$5,198 | 882 | |
| 13 | 2019-01-06 | 50 | 1104 | Ne | w England | \$10,782 | 1,984 | |
| 14 | 2019-01-06 | 50 | 1105 Great Lakes | | \$1,535 | 257 | | |
| 15 | 2019-01-06 | 51 | 1102 | Gu | If Coast | \$4,956 | 877 | |
| 16 | 2019-01-06 | 51 | 1103 | Mic | dlantic | \$5,347 | 988 | |
| | Data To Import | | | | | | | |

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.

| | | le し し し し し し し し し し し し し し し し し し し | • <" • | : | Sales Even | t Transact | ions 20 |)19-10-16.x | lsx - E | xcel | | | | F | | | × |
|----|------------------|--|------------------|---------|------------|---------------|-------------|-------------|----------|---------|-------|-------|--------|-----|---------|---------|--------------|
| I | File Home | Insert Page | e Layout F | ormulas | Data F | Review | View | Add-ins | Help | PDF | ACROB | AT | Team | Q | Tell me | ß | P |
| 17 | 705 - | : × | $\checkmark f_x$ | | | | | | | | | | | | | | ~ |
| | Α | В | С | | D | E | | | F | | | G | | | | Н | |
| 1 | Days | Distribution Channel | Product Class | Desc | ription | Prod Categ | uct jory | De | scriptio | on | Sa | les E | vent 3 | | Sales | Event 4 | |
| 2 | 2019-01-03 | DIR | В | Branded | | 200 | | Fresh Veg | etables | | | | | 150 | | | 737 |
| 3 | 2019-01-03 | DIR | В | Branded | | 201 | | Canned Fi | ruit | | | | | 468 | | 1, | 936 |
| 4 | 2019-01-03 | DIR | В | Bra | | | | Pork | | | | | | 75 | | | 438 |
| 5 | 2019-01-03 | DIR | В | Bra | | | | Beef | | | | | | 87 | | | 493 |
| 6 | 2019-01-03 | DIR | В | Bra | Keep Da | ita On | | Fresh Frui | t | | | | | 224 | | | 931 |
| 7 | 2019-01-03 | DIR | В | Bra S | ingle Tal | b/Sheet | | Frozen Fr | uit Prod | ucts | | | | 42 | | | 253 |
| 8 | 2019-01-03 | DIR | В | Brai | Ŭ | | | Frozen Pr | epared | Dinners | ; | | | 119 | | | 973 |
| 9 | 2019-01-03 | DIR | 0 | Oth | | | | Fresh Veg | etables | | | | | 132 | | | 6 0 8 |
| 10 | 2019-01-03 | DIR | 0 | | | 207 | | Fresh Frui | t | | | | | 22 | | | 45 |
| 11 | 2019-01-03 | INB | В | randed | | 200 | | Fresh Veg | etables | | | | | 313 | | 1, | 593 |
| 10 | 2010 01 02 | IND Data Fr | | Brandod | | 201 | | Connod E | n út | | | | ່າ | 100 | | 12 | s16 👗 |
| | | vents Data Fo | n POS | (\pm) | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | + | 70% |

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 | В | С | D | E | F | G | |
|----|---------------|--------------------|------------------------|------------------------------|-----------------|-----------------|-----------------|----------|
| 1 | | | | From | Sales Estimates | Sales Estimates | Sales Estimates | н |
| 2 | | | | For Future Forecast | December | December | December | |
| 3 | RepBroker | RepBr Long Descrip | otion Customer Ship-To | ShpTo Long Description | 2020-12-01 | 2020-12-01 | 2020-12-01 | μ |
| 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 | 1 |
| 10 | 300 | Nicole Toscano | 101106FEWO | Wilder Foods St Louis MO WOF | 65.432 | 62.195 | 72.700 | 6 |
| 11 | | | | | | | | |
| 12 | 300 | Nicole Tos no | 101103BEVVO | Wilder Foods Buttalo NY WOB | 56,185 | 56,133 | 64,276 | - |
| 13 | 300 | Nicole Toscal. | 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 | Eliminate Null | Wilder Foods Buffalo NY WOJ | 50,566 | 50,519 | 57,848 | |
| 16 | 300 | Nicole Toscano | ws From Import | Wilder Foods Buffalo NY WOI | 47,757 | 47,713 | 54,635 | |
| 17 | 300 | Nicole Toscano | File | Wilder Foods St Louis MO WOA | 46,737 | 44,425 | 51,928 | |
| 18 | 300 | Nicole Toscano | File | 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 | 10111/JEVVO | 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 | |
| | \rightarrow | User Forecast wit | th AS Compa View [| Detail 🛛 🕂 | • | | • | |
| | 1 | | | | | | + 60% | ό |

Exclude Unnecessary Extras

Certain types of information should be excluded either because it doesn't make sense for an import, isn'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**.
 - \circ "All Others" rows or columns related to filtering.
 - Conditional format icons or formatting.
 - o Charts.
 - o Hyperlinks.
 - o 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.
 - o Images.
 - o Charts.
 - Cell borders.
 - o Comments or notes.
 - Excel features such as Pivot tables and text boxes.

Tips For Using Other Types Of Import Sources

Here are a few tips to consider when you are setting up data in preparation for a data import and the data will be kept in a CSV file, text file, or SQL database table.

Note: If you're using Excel spreadsheets as the source of your import, see the topic <u>Tips For Setting Up Your Excel</u> <u>Imports</u>.

Tips For CSV And Text Files

Here are guidelines for CSV and text files:

- 1. Valid delimiters you can use are comma, colon, equal sign, semicolon, space, tab, or pipeline.
- 2. The field quote can be either Double Quotes or Single Quotes.
- 3. A minimum of two columns are required, one for dates and one for measures.
- 4. Transaction dates must be in one of the accepted valid date formats for Data Imports. See the "<u>Dates</u>" set of tips later in this topic for valid date formats.
- 5. Measure values must be numbers, but you should leave them in their unformatted state and exclude any special characters. For example, exclude currency characters such as dollar signs from sales amount data. And instead of using parenthesis for negative numbers, use a negative sign such as -1500.
- 6. If using a CSV file, verify you saved it in the CSV UTF-8 format.

Tips For SQL Server Databases Or Azure SQL Databases

Here are guidelines for Source Table Field Data Types:

1. Dimension value columns must be String.

- Transaction date columns must be Date, DatTime, or String. See the "<u>Dates</u>" set of tips in the next section for valid date formats.
- 3. Measure values must be numbers, but you should leave them in their unformatted state and exclude any special characters. For example, exclude currency characters such as dollar signs from sales amount data. And instead of using parenthesis for negative numbers, use a negative sign such as -1500.

Tips For All CSV/Text Files & Tables: Include Transaction 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. 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 or table. 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, 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 source contains columns of descriptive info, you can tell Data Import to ignore the columns.
- **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.
 - For the Transactions dates that appear in every row, 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.
 - Format any negative numbers with a negative sign in front of them such as -1467.

Use Descriptive Info In A Header Row To Help Map To Stratum Data

Identifying information about the data contained in each column of your file or table should be included in a header row within the source. It helps identify what's in each column – saving you time as you map columns or mark them to be ignored while setting up your import.

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.

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 or table. 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 source will be treated as the end of your file or table. Data Import stops looking for data to import once it finds a null row, and it will not consider any of the rows of data after that point.

Exclude Unnecessary Extras Like Totals

Certain types of information should be excluded either because it doesn't make sense for an import, isn'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. For example, **exclude grand totals and subtotals.** Only include the detail measure data in import files and tables. Importing subtotal and total data would duplicate other data in the import.

Windows

Category Window

| Name Architecture Data Controlled By Data Table Actual Sales Standard Corporate Corporate Corporate Budget Standard Corporate |
|--|
| Name Architecture Data Controlled By Data Table Actual Sales Standard Corporate Budget Standard Corporate Cart Activity Standard Corporate Deductions - Open Standard Corporate Forecast Standard Corporate Inventory Standard Corporate User Budget Enhanced User mtu1transaction46 mtu2transaction46 User POS Enhanced Data Steward mtu3transaction46 1 Toolbar - mtu3transaction46 User POS Enhanced Data Steward 1 Toolbar - |
| Actual Sales Standard V Corporate V Budget Standard Corporate V Cart Activity Standard Corporate V Deductions - Open Standard Corporate V Deductions - Open Standard Corporate V Forecast Standard Corporate V User Budget Enhanced V User Standard Corporate V User Forecast Enhanced V User V User POS Enhanced V Data Steward M mtu2transaction46 mtu2transaction46 mtu3transaction46 mtu3transaction46 Mtu3transaction46 mtu3transaction46 Mtu3transaction46 mtu3transaction46 mtu3transaction46 mtu3transaction46 mtu3transaction46 Mtu3transaction46 m |
| Budget Standard Corporate |
| Cart Activity Deductions - Open Forecast Inventory User Budget User Forecast User Forecast Enhanced Data Steward mtultransaction46 mtu2transaction46 mtu3transaction46 mtu3transaction46 mtu3transaction46 mtu3transaction46 • Save - Click to save changes made to categories. • Help - Click to open help that is specific to managing categories. 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. 'Standard' as Architecture and 'Corporate' as Data Controlled By – 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 |
| Deductions - Open Standard Corporate 2 Forecast Standard Corporate 2 Inventory Standard Corporate 2 User Budget Enhanced User mtu1transaction46 User Forecast Enhanced Data Steward mtu2transaction46 User POS Enhanced Data Steward mtu3transaction46 1 Toolbar - • Save - Click to save changes made to categories. • 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. * Standard' as Architecture and 'Corporate' as Data Controlled By – 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 |
| Forecast Standard Corporate mtultransaction46 Inventory Inventory Standard Corporate mtultransaction46 User Budget Enhanced User mtultransaction46 User Forecast Enhanced Data Steward mtultransaction46 User POS Enhanced Data Steward mtultransaction46 Image: Toolbar - • Save - Click to save changes made to categories. • • Help - Click to open help that is specific to managing categories. • 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. 'Standard' as Architecture and 'Corporate' as Data Controlled By – 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 cony Stratum data from one measure to another measure |
| Inventory Standard Corporate mtultransaction46 User Budget Enhanced User mtu2transaction46 User Forecast Enhanced Data Steward mtu2transaction46 User POS Enhanced Data Steward mtu2transaction46 Image: Toolbar - . Save - Click to save changes made to categories. . Help - Click to open help that is specific to managing categories. . Help - Click to open help that is specific to managing categories. . Kategories 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. 'Standard' as Architecture and 'Corporate' as Data Controlled By – 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 cony Stratum data from one measure to another measure |
| User Budget Enhanced User mtu1transaction46 User POS Enhanced Data Steward mtu2transaction46 Image: Data Steward mtu3transaction46 mtu3transaction46 Image: Data Steward Image: Data Steward mtu3transaction46 Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Image: Data Steward Imate: Data Steward Image: Data Ste |
| User Forecast Enhanced Data Steward mtu2transaction46 User POS Enhanced Data Steward mtu3transaction46 Image: Toolbar - • Save - Click to save changes made to categories. mtu3transaction46 • Help - Click to open help that is specific to managing categories. • Help • Click to open help that is specific to managing categories. • Save - Click to open help that is specific to managing categories. • Save determines which sources of data can be used for them. Details follow. * Standard' as Architecture and 'Corporate' as Data Controlled By – 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 ope measure to another measure |
| User POS Enhanced Data Steward mtu3transaction46 Image: Toolbar - • Save - Click to save changes made to categories. • • Help - Click to open help that is specific to managing categories. • Help • 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. • • Standard' as Architecture and 'Corporate' as Data Controlled By – 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 |
| Toolbar - Save - Click to save changes made to categories. Help - Click to open help that is specific to managing categories. 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. Standard' as Architecture and 'Corporate' as Data Controlled By – 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 |
| 'Enhanced' as Architecture – This type can have data controlled by the user community, either by general users or Data Steward administrators. For these categories, 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 complement your Stratum data. For example, measures from 'Enhanced ' categories can be used with Data Import functionality, which allows users to import measure data from Excel spreadsheets or other sources of data. If the Enhanced category is set to Data Steward, only Security Administrators with a Data Steward designation can import data to that category. If the Enhanced category is set to User, any user with access to using Data Import can import data to that category. |

| | *Note: If a category you expect to see in this window isn't displayed here, see the topic " <u>Why Isn't A</u> <u>Stratum Category Displaying In The Category Window?</u> ". |
|---|---|
| 3 | Search Option – Use this field to search for categories by name. |

Data Import Information Window

This window has two tabs if your import uses a Data Import template. It only has one tab, the <u>Category tab</u>, if a template wasn't used. Both tabs are described after their images that follow.

Template Tab

| Template Category Name: For Point of Sales imports Description: Mapped for amount and units measures Type: Global | ~ |] | | User POS | | | | | | | |
|---|------------------|--------------|-----------------|-------------|--|--|--|--|--|--|--|
| Name: For Point of Sales imports Description: Mapped for amount and units measures Type: Global | ~ |] | | | | | | | | | |
| Description: Mapped for amount and units measures Type: Global | ~ | | | | | | | | | | |
| Type: Global | ~ | | | | | | | | | | |
| | 4 | | | e: Global 🗸 | | | | | | | |
| Delete Category Data Before Import | | | | | | | | | | | |
| Allow Schema Drift And Continue Processing | | | | | | | | | | | |
| Configuration: | | | | | | | | | | | |
| Source Of Data For Import: Local File Source Type: Excel Target Category: User POS Format: Transactions Header Rows In File: 1 | | | | Î | | | | | | | |
| Mapping: | | | | | | | | | | | |
| Date Dimension Dimension Ignore | Me | easure | Measure | | | | | | | | |
| yyyy-mm-dd (2012-03-01) Ship-To Region Ship-To Territory | Us | er POS Amt 3 | User POS Unit 3 | | | | | | | | |
| Days Ship-To Region Ship-To Territory STerr Lon | g Description Us | er POS Amt 4 | User POS Unit 4 | 171 | | | | | | | |
| | | | | | | | | | | | |
| Owner: Karen Shype | | | | | | | | | | | |
| Last Updated Date: 9/3/2024 4:52:24 PM | | | | | | | | | | | |
| Last Updated By: Karen Shype | | | | | | | | | | | |
| Created Date: 9/3/2024 4:52:24 PM | | | | | | | | | | | |
| Last Used Date: 9/3/2024 4:52:27 PM | | | | | | | | | | | |
| Last Used By: Karen Shype | | | | | | | | | | | |
| OK | | | H | elp | | | | | | | |

1
2

General, Configuration, and Mapping Properties – This read-only information shows you the name, description, other general settings, configuration properties, and mapping details for the template being used for the import.

Owner and Usage Properties – The owner and key dates about the template are shown here, such as when it was last updated and last used.

Category Tab

| | | D | Data Import Information | × |
|-------------------|-------------------|---------------------|---|----------|
| Template | Category | | | User POS |
| Dimension | oser controlled r | orp nanceing code | Source | |
| Product Group | User Controlled P | Grp Sales Division | None | ^ |
| Product SubClass | | | None | |
| Product Type | | | None | |
| Product Type S | Short Description | | None | |
| Region | | | None | |
| RepBroker | | | None | |
| Rep Broker Sta | ite | | None | |
| RepBroker Tvp | е | | None | |
| Sales Director | | | None | |
| Sales Director | Town | | None | |
| Ship-To Market | | | None | |
| Ship-To Market | t City | | None | |
| Ship-To Region | | | Import File | |
| Ship-To Territory | | | Import File | |
| Ship-To Territo | ry Sales Mngr | | Always sourced from a Ship-To Territory Attribute | |
| UPC Global Numb | er | | None | |
| UPC Global Nui | mber ABC Class | | None | / |
| UPC Global Nul | mber User Control | lled - UPC Category | None | |
| UPC Global Nul | mber User Control | lled - UPC Lead Ti | None | |
| UPC Global Nul | mber User Control | lled UPC Market P | None | |
| UPC Global Nul | mber User Control | lled UPC Seasonal | None | • |
| | | | ОК | Help |

Color Coding – The color of text in this tab 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.

Dimension – This tab 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.

*Note: Virtual dimensions are created from the attribute relationships of a dimension.

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.

- **Import File** means the data for this dimension will come directly from the import source. 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 source 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 |
| Chin To Torritory | |
| Ship-to territory | None |
| Ship-To Territory Sales Mngr | None |
| Ship-To Territory Sales Mngr UPC Global Number | None None None |

Data Import List Window

| +` ¢` (| Data Import | | | | | | | |
|---|---|--|--|--|--|--|--|--|
| Category User Forecast User POS User Budget User Forecast User Budget 1 to 6 of 6 | CategoryDescriptionSubmitted BySubmittedCompletedStatusFile/Table NameJser ForecastAdding Data For Forecasting WorkKaren Shype09/06/2024 11:32:3209/06/2024 11:32:43CompletedImport Source Monthly ForUser POSVarious Holiday or Other Pop-up Event SalesKaren Shype09/05/2024 16:59:1409/05/2024 17:00:45CompletedHoliday Period Coupon PoUser POSVarious Holiday or Other Pop-up Event SalesRamdas Jackson07/29/2024 12:23:1907/29/2024 12:23:36CompletedForecast Pro Output- TrarUser Forecast2024 Budget Data by ProductKaren Shype09/09/2024 10:58:5210/10/2019 12:38:47CompletedForecast Pro Output - TraUser 6 of 6Id 4 1 ▶ ↓ | | | | | | | |
| 1 | Toolbar – New Click to set up a new Data Import. 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 <u>Review Processing Details For A Data Import</u>. 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. 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 the import Category, the description if one was designated for the import, when imports were submitted and when their processing was completed. The status for a Data Import will be In Process, Completed, or Error. | | | | | | | |

Data Import Template List Window

| Data Import Templates | | | | | | | |
|--|--|--|--|------------------|--|--|--|
| Name Description Category Owner Last Used Forecasting imports For importing specialty forecasts User Forecast Karen Shype 09/09/2024 11:25:1- For Point of Sales Data Imports Bring in seasonal Point of Sales data User POS Karen Shype 08/09/2024 14:01:0 For Importing Budget Data Bring in data for budgeting analysis User Budget Ramdas Jackson 07/29/2024 12:23:0 1 to 3 of 3 I ▲ 4 1 ▶ I I Image: Category Owner Last Used | | | | | | | |
| Toolb | ar – New - Click to set up a Delete - Select a temp data for which the template Help - Click to open h | a new template. plate and then click the De was used is not impacted elp that is specific to work | lete button to delete by the delete. ing with templates. | it. Any imported | | | |



Data Import Templates Information – The list window shows all templates that users have created, the import Category for the template, the description if one was designated, who owns the template, and the last time the template was used for a Data Import.

Data Import Template Maintenance Window

| | | 1 | Data Import Template | 28 | × | | |
|---------------------|----------|--------------------|---------------------------|-----------------------|---------------------|--|--|
| | 90 | J | | | | | |
| Name: | Adding E | Budget Amt & | Units Data for Products | | | | |
| 2 Description: | Bring in | data for budg | eting analysis | | | | |
| Type: Global | | | | | | | |
| 3 | Delet | e Category Da | ata Before Import | | | | |
| | Allow | Schema Drift | : And Continue Processing | | | | |
| Configuration: | | | | | | | |
| Source Of Data For | Import: | Local File | _ | | | | |
| Source Type: | | Excel | F | | | | |
| Target Category: | | User Budget | | | | | |
| Format: | | Transactions | | | | | |
| Header Rows In File | : | 1 Nanac mena da | (2012.02.01) | | | | |
| Inansaction Date Fo | rmat: | yyyy-mm-dd | (2012-03-01) | | - | | |
| Mapping: | | | | | | | |
| Date | 6 | Dimension | Ignore | Measure | Measure | | |
| yyyy-mm-dd (2012- | 03-01) | Product | | User Budget Amt 1 | User Budget Unit 1 | | |
| Date | | Product | Prod Long Description | Expected Sales Amount | Expected Sales Unit | | |
| | | | | | | | |
| • | | | | | | | |
| Created Date: | 09/09/20 | 24 11:30:13 | | | | | |
| Owner: | Karen Sł | туре | | | | | |
| Last Updated Date: | 09/09/20 | 24 11:30:36 | | | | | |
| Last Updated By: | Karen Sh | уре | (7) | | | | |
| Last Used Date: | 09/09/20 | 24 11:30:41 | | | | | |
| Last Used By: | Karen Sh | уре | | | | | |
| Template ID: | 5 | | | | | | |
| | | | | | | | |

Save and Save As - Use to save the current template or to perform a Save As to create a new template. When you're adding a new template from the Data Mapping window and click Save, you are returned to the mapping window after the save. From there, you can process the active import with the newly set up template used for the import's mapping and configuration.
Delete O – Click to delete the template. You will be prompted to confirm the deletion. Advanced and casual users can delete only their own personal templates, not global templates.
Exit O – Click to close the window without making any changes and return to the window you were on. You will be prompted to continue without saving if the template has been modified.

| | Help 🕜 – Click to access help that is specific to templates. |
|---|---|
| 2 | Name, Description, and Type – Give the template a name and description. Type to Personal or Global. Global templates can be used by other data import users. Personal templates are meant only for your use. |
| | Note: The template description is different that the import description. For each import that uses the template, you can use the Description field on its Data Import Mapping window to give the import a unique description. |
| 3 | Delete Category Data Before Import – The property tells Stratum whether or not to clear all category import before the new data is imported. Select this option if you want to have all existing data from ALL measures of the Target category to be cleared before the new data is imported. If left deselected, imported data is added to existing measure data. |
| 4 | Allow Schema Drift and Continue Processing – This property tells Stratum how to treat changes to the import file / table that do not match the template's data mapping details. It's selected by default which means the import will adapt to differences between your template mapping and what's in your import file / table. Processing will continue if there are differences. Data Import will use automatic mapping logic when new columns / fields are added in the import file / table that didn't exist when the template mapping was originally set up. Also, if non-essential columns are missing or removed from your source file / table, the import will continue processing. Deselect this option if you don't want to allow imports to proceed when there is a difference between the import file / table and the template data mapping. If differences are found, the Data Import will end in an error. You will need to change the format of the source data or use a different template. Use this option if you want to be aware of any changes to your import files / tables. |
| 5 | Configuration – This section is read-only. It reflects configuration settings that were set up when you mapped the import that was the starting point for this Template. Information that shows in the <u>Import</u> <u>Configuration window</u> for an import is what shows in this part of the maintenance window. |
| 6 | Mapping – This section is read-only. It reflects mapping that was set up when you mapped the import that was the starting point for this Template. Information that shows in the <u>Data Mapping window</u> for an import is what shows in this part of the maintenance window. |
| 7 | Owner and Other Information – This included an Owner property where see the current owner of change the template owner. Other information tells you when the template was created, last updated, and last used. The Template ID shows here too. |

Data Import – Template Selection Window

This window shows templates that are a match for your import source. That happens if the source was used in the past with the same template(s) shown in the window **or** the Category of data in the import source is a match for what the template's been configured to be import. More details follow these images.

| Data Import - Template Selection × | | | | | | |
|------------------------------------|---|--|--|---|-----------------|--|
| The followi to proceed | ng Data Import Template(s) have been use with the import. If you do not want to use | d with the source you selected. Please selec any of these Templates, please select "None | t one and click Pre " and click Preview | view to review it or Process | | |
| Name / | x | Description | Owner | Last Used Date | | |
| Adding | Budget Amt & Units Data for Products | Bring in data for budgeting analysis | Karen Shype | 9/9/2024 11:30:41 AM | | |
| None | | Data Import - Template Sel | ection | | × | |
| | The following Data Import Template(s) r review it or Process to proceed with the | natch the Category that will be selected for import. If you do not want to use any of the | your import source ese Templates, plea | e. Please select one and click Presses select "None" and click Previous select "None" selec | eview to ew. | |
| | Name 🔺 | Description | Owner | Last Used Date | Cate | |
| | For Point of Sales imports | Mapped for amount and units meas | ures Karen Sh | 1ype 9/3/2024 4:52:27 Pl | M User | |
| • | Point of Sales Data Imports None | Bring in seasonal Point of Sales dat | a Karen Sł | нуре 8/9/2024 2:01:04 P | 4 User | |
| | • | Process Preview | Cancel | | Þ | |
| 1 | The descriptive text at the to match for an import you've s | p of the window gives you infor tarted to set up. | mation about | why the template(s) ar | e a | |
| | A match happens if t the same template(s | the import source selected for th) shown in the window | ne current imp | port was used in the pa | ast with | |
| | A match also happen template's been con | ns when the Category of data ir figured to be import. | n the import so | ource is a match for w | nat the | |
| 2 and | Templates that can be used handle configuration and ma the following ways. | for your import are listed in the pping for you or choose not to u | window. You use a templat | can choose a template e. You can proceed in | e to one of | |
| 3 | a. Choose a template a displays with the sele give the import a des | and click Preview to review the a ected template's details applied scription and process the impor | applied templ I to the import t. | ate. The Data Mapping t data. From there, you |) can | |

| b. | Choose a template and click Process to proceed with processing the import and skip previewing it. You will be prompted to confirm you want to proceed with the import. |
|----|---|
| C. | Choose None then click Preview to proceed without using a template. Complete mapping and configuration setup using the Data Mapping window that displays, optionally give the import a description, and process the import. |

Data Mapping – Data Import Window

Use this window to review mapping details for your import. Configuration details can be fine-tuned and import templates can be added from this window. The options in the window will vary slightly depending on whether or not you are using a template for the import.

- <u>Mapping Window No Template Used</u>
- Mapping Window Template Used

Mapping Window – No Template Used

| Use the Configuration opti Description: Optionally enter Click Process to import your | ons and Mapping prev r a description for this in data or click Add Templa | Data Mappi iew to tell us how to treat | ng - Data Imp data for the import. | Configu | ation Delete Catego | ory Data I | Before Import |
|---|---|---|---------------------------------------|--------------|----------------------|------------|---------------|
| Date | ▼ Dimension | ▼ Ignore | ▼ Measure | | Measure | T | |
| dd-mmm-yy | Product | T | ▼ User Budg | et Amt 2 🔻 | User Budget Unit 2 | • | |
| Weeks | Product | Prod Long Descri | ption Expected | Sales Amount | Expected Sales Units | | |
| 29-Dec- | 24 621A954011 | Baby Carrots 1A | | \$11,402 | 2 | 265 | P |
| 29-Dec- | 24 621B954011 | Baby Carrots 1B | | \$22,804 | 1 | 530 | |
| 29-Dec- | 24 621C954011 | Baby Carrots 1C | | \$12,542 | 2 | 291 | |
| 20 Doc | 24 6210054011 | Paby Carrote 1D | | ¢12,69 | | 210 | / |
| 29-Dec- | 24 621E954011 | Baby Carrots 1E | | \$14,823 | 3 | 344 | |
| 29-Dec- | 24 621F954011 | Baby Carrots 1F | | \$15,963 | 3 | 371 | |
| 29-Dec- | 24 621G954011 | Baby Carrots 1G | | \$17,103 | 3 | 397 | |
| 29-Dec- | 24 621H954011 | Baby Carrots 1H | | \$18,243 | 3 | 424 | |
| 29-Dec- | 24 6211954011 | Baby Carrots 1I | | \$19,384 | 1 | 450 | |
| 29-Dec- | 24 6213954011 | Baby Carrots 1J | | \$20,524 | 1 | 477 | |
| 29-Dec- | 24 621K954011 | Baby Carrots 1K | | \$11,402 | 2 | 265 | |
| 29-Dec- | 24 623A954011 | Baby Carrots 3A | | \$11,21 | L | 298 | |
| 29-Dec- | 24 623B954011 | Baby Carrots 3B | | \$22,42 | L | 596 | |
| 29-Dec- | 24 623C954011 | Baby Carrots 3C | | \$12,332 | 2 | 328 | |



Toolbar -

- Submit The Data Import For Processing ² Click to validate the import setup and process the Data Import. Once you confirm you want to proceed, the mapping window closes and you're returned to the <u>Data Import list window</u>.
- 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.
- Information U Click to see details about the category you have identified as the import's Target category (the one to receive imported data). See which dimensions you've mapped data to and identify others belonging to the category that will be impacted by the import. A tab for template information will show in the window if you are using a template with the import. See the <u>Data Import Information Window</u> topic to learn about details displayed in this window.
 - **Help** V Click to open help that is specific to working with Data Imports.

| - | | | | | | | | | |
|---|--|--|--|---|--|--|--|--|--|
| 2 | Description – Opt imports. | ionally provide a de | escription for the imp | oort, which helps you | distinguish it from other | | | | |
| | Configuration – C properties that tell | Click to access the <u>I</u> Viewer about your | mport Configuration import source and t | window. From there | , you can edit basic r the import. | | | | |
| | Delete Category Data Before Import – Decide whether or not to clear all category import before the new data is imported. Select this option if you want to have all existing data from ALL measures of the Target category to be cleared before the new data is imported. If left deselected, imported data is added to existing measure data. | | | | | | | | |
| | Add Template – C reused again wher The active import a | Optionally save your n processing import at the time you are s | r configuration and r s for the same cate setting up a templat | napping details as a gory. See also <u>Add A</u> e will use the templat | template that can be <u>Data Import Template</u> . e for processing. | | | | |
| 3 | Data Mapping Preview – This section shows up to a 100 row preview of your import file / table. The drop-down lists in the first two rows are for use in mapping import data to Stratum – use them to tell Stratum. 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 import source (through a property in Import Configuration). 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 source 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. | | | | | | | | |
| | Iapore 🗸 | Tapore 🗸 | Ignore 🗸 | Ignore 🗸 | Ianore | | | | |
| | T State Stat | T T | · · · · · · · · · · · · · · · · · · · | T State T | ▼ | | | | |
| | Date | Product Category | PCat Long Description | Budget Budget Amount Frozen | Budget Budget Amount Working | | | | |
| | 2017-01-31 | 20 | 0 Fresh Vegetables | \$47,360,467 | 59,644,930 | | | | |
| | 2017-01-31 | 20 | 12 Canned Fruit | \$2/2,4/0,7/4 | \$343,144,845 | | | | |
| | 2017-01-31 | 20 | 3 Beef | \$17,206.953 | \$21,55,552 | | | | |
| | 2017-01-31 | 20 | 4 Fresh Fruit | \$28,605,895 | \$36,025,756 | | | | |
| | 2017-01-31 | 20 | 7 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 colun | nn contains Date in | fo and the user spe | cified the date format | | | | | |
| | Next colur down list. | nn is a Dimension a | and the user is seled | ting the dimension fr | om the provided drop- | | | | |
| | The last tv | vo columns are Mea | asures. More on tho | se in the final image. | | | | | |

| | Dimension | ▼ Ignore | e 🔻 | Measure V | Measure |
|--|--|---|--|---|--|
| YYYY-MM-DD | ▼ - Select a Target - | T | • | ′ - Select a Target - 🛛 🔻 | - Select a Target - |
| Date | Lot | | Long Description | Budget Budget Amount Frozen | Budget Budget Amount V |
| 2017-01-31 | Planner | | Vegetables | \$47,360,467 | \$5 |
| 2017-01-31 | Product | | d Fruit | \$272,470,774 | \$34 |
| 2017-01-31 | Product ABC Class | | | \$17,039,729 | \$2 |
| 2017-01-31 | Product Commodity Co | de | | \$17,206,953 | \$2 |
| 2017-01-31 | Product Primary Buver | | Fruit | \$28,605,895 | \$3 |
| 2017-01-31 | Product Primary Planne | or I | n Fruit Products | \$12,272,692 | \$1 |
| 2017-01-31 | Product Purchasina LIM | , | n Prepared Dinners | \$20,212,280 | \$2 |
| 2017-02-28 | Product Parend | | Vegetables | \$39,632,491 | \$4 |
| 2017-02-28 | Product Brand | | d Fruit | \$171,912,558 | \$21 |
| 2017-02-28 | Product Category | | | \$13,720,377 | \$1 |
| 2017-02-28 | Product Category Role | | | \$14,225,646 | \$1 |
| 2017-02-28 | Product Class | | Fruit | \$24,196,492 | \$3 |
| 2017-02-28 | Product Family | | 1 Fruit Products | \$9,622,249 | \$1 |
| 2017-02-28 | Product Group | 1 | n Prepared Dinners | \$18,070,002 | \$2 |
| 2017-03-31 | Product SubClass | | Vegetables | \$51,079,265 | \$6 |
| 2017-03-31 | Product Type | | d Fruit | \$259,180,733 | \$32 |
| 2017-03-31 | Product Type Short De | scription | | \$17,599,731 | \$2 |
| | Design | · · · · · · | | | |
| The Target dro | vp-down list under ea | ich Mea | sures are used | \$17,733,770 | stratum measure |
| The Target dro receive the imp | op-down list under ea oorted data. The map | ach Meas oping is | sures are used complete, and | to choose the target \$ the user can process | Stratum measure |
| The Target dro receive the imp Date | op-down list under ea ported data. The map ▼ Dimension ▼ Product Category | ach Meas oping is | sures are used complete, and re | to choose the target S the user can process | Stratum measure the import. Measure - Select a Target - |
| The Target drc receive the imp Date YYYY-MM-DD Date | op-down list under ea ported data. The mag ▼ Dimension ▼ Product Category Product Category | ach Measoping is | sures are used complete, and ^{re} | to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen | Stratum measure the import. Measure Select a Target - User POS Amt 1 |
| Date 2017-03-31 The Target drc receive the imp Date 2017-01-31 | pp-down list under ea ported data. The map ▼ Dimension ▼ Product Category Product Category | ach Mea oping is Ignor PCat 200 Fresh | sures are used complete, and re tong Description | \$17,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen \$47,360,46 | Stratum measure the import. Measure - Select a Target - User POS Amt 1 Z User POS Amt 2 |
| Date 2017-03-31 Date YYYY-MM-DD Date 2017-01-31 2017-01-31 | pp-down list under ea ported data. The map ▼ Dimension ♥ Product Category Product Category | Ach Mea oping is V Ignor V PCat 200 Fresh 201 Canne | sures are used complete, and re tong Description ty Vegetables ed Fruit | \$17,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen | Stratum measure the import. Measure - Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 | pp-down list under ea ported data. The map ▼ Dimension ♥ Product Category Product Category | Ach Mea oping is Ignor V PCat 200 Fresh 201 Canno 202 Pork | sures are used complete, and re 1 Long Description Vegetables ed Fruit | Start 1 S | Stratum measure the import. Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 4 |
| Date 2017-03-31 The Target drc receive the imp Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 | pp-down list under ea ported data. The mag | Ach Mea pping is Ignor PCat 200 Fresh 201 Canne 202 Pork 203 Beef | sures are used complete, and re Complexe , and re Complexe to yegetables ed Fruit | str,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen \$47,360,46 \$272,470,77 \$17,039,72 \$17,206,95 \$17,206, | Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Amt 4 User POS Unit 1 |
| Date 2017-03-31 The Target drc receive the imp Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 | pp-down list under ea ported data. The mag ▼ Dimension ▼ Product Category Product Category | Ach Mea pping is Ignor PCat 200 Fresh 200 Canne 202 Pork 203 Beef 204 Fresh | sures are used complete, and re tong Description • Vegetables ed Fruit | \$17,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen | Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Amt 4 User POS Unit 1 User POS Unit 2 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 | pp-down list under ea ported data. The map ▼ Dimension ▼ Product Category Product Category | Ach Mea pping is Ignor PCat 200 Fresh 201 Canne 202 Pork 203 Beef 204 Fresh 207 Froze | sures are used complete, and re tong Description a Vegetables ed Fruit | \$17,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen | Stratum measure the import. Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Amt 4 User POS Unit 1 User POS Unit 2 User POS Unit 2 User POS Unit 3 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 | pp-down list under ea ported data. The map ▼ Dimension ▼ Product Category Product Category | Ach Mea pping is ✓ Ignor ✓ PCat 200 Fresh 201 Canne 202 Pork 203 Beef 204 Fresh 207 Froze 208 Froze | sures are used complete, and re tong Description Vegetables ed Fruit n Fruit en Fruit en Fruit Products en Prepared Dinners | \$17,733,770 to choose the target \$ the user can process Measure User POS Amt 1 Budget Budget Amount Frozen | Stratum measure the import. Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Amt 4 User POS Unit 1 User POS Unit 2 User POS Unit 2 User POS Unit 2 User POS Unit 3 User POS Unit 4 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-02-28 | pp-down list under ea ported data. The map | Ach Mea oping is Ignor PCat 200 Fresh 201 Canne 202 Pork 203 Beef 204 Fresh 204 Fresh 204 Fresh 207 Froze 208 Froze 208 Froze 200 Fresh | sures are used complete, and re tong Description Negetables ed Fruit Fruit Pruit Pruit Pruit Pruit Products Prepared Dinners Negetables | \$17,733,770 to choose the target \$ the user can process User POS Amt 1 User POS A | Stratum measure the import. Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 4 User POS Unit 1 User POS Unit 2 User POS Unit 3 User POS Unit 3 User POS Unit 4 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-02-28 2017-02-28 | pp-down list under ea ported data. The map | Ach Mea oping is Ignor PCat 200 Fresh 201 Canne 202 Pork 203 Beef 204 Fresh 207 Froze 200 Fresh 201 Canne | sures are used complete, and re Long Description • Vegetables ed Fruit • Fruit • Fruit • Prepared Dinners • Vegetables ed Fruit | \$17,733,770 to choose the target \$ the user can process User POS Amt 1 Budget Budget Amount Frozen \$47,360,46 \$272,470,77 \$17,039,72 \$17,039,72 \$17,206,95 \$28,605,85 \$12,272,65 \$28,605,85 \$12,272,65 \$28,605,85 \$12,272,65 \$28,605,85 \$12,272,65 \$28,605,85 \$12,272,65 \$28,605,85 \$117,206,95 \$28,605,85 \$28,605,85 \$20,212,25 \$28,605,82 \$33,632,45 \$33,642 \$33,652,452 \$33,652,452 \$33,652,452 \$33,652,452 \$33,652,452 \$34,652,452 \$3 | Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 2 User POS Amt 4 User POS Unit 1 Suser POS Unit 2 User POS Unit 3 User POS Unit 4 User POS Unit 4 |
| Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-02-28 2017-02-28 2017-02-28 | pp-down list under ea ported data. The map ▼ Dimension ▼ Product Category Product Category | Ach Mea pping is ✓ Ignor ✓ PCat 200 Fresh 201 Cannu 202 Pork 203 Beef 204 Fresh 207 Froze 208 Froze 208 Froze 208 Froze 200 Fresh 201 Cannu 202 Pork | sures are used complete, and re tong Description • Vegetables ed Fruit • Fruit • Fruit • Prepared Dinners • Vegetables • Vegetables • Vegetables • Vegetables • Vegetables | \$17,733,770 to choose the target \$ the user can process User POS Amt 1 Budget Budget Amount Frozen \$47,360,46 \$272,470,77 \$17,039,72 \$17,206,95 \$28,605,85 \$12,272,65 \$20,212,26 \$39,632,45 \$39,632,45 \$17,1912,55 \$13,720,37 | Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 2 User POS Amt 3 User POS Amt 4 User POS Unit 1 User POS Unit 1 User POS Unit 3 User POS Unit 3 User POS Unit 4 Select a Strategy of the select |

Mapping Window – Template Used

When you are using a template for your data import, the mapping window shows the selected template in the "You are using Template" section. If additional templates exist that could be used with this import, this section will be an active drop-down list. In that case, you can use the list to switch to a different template. If you want to detach the template and import without using it, click the "x" to the right of this Template property.

| | | | Data Map | pin | g - Data In | port | | | | |
|-------------------------------|--------------------------|-----------|-----------------------------|------|-------------------|-----------|--------------------------|----------|-------|---|
| 0000 | | | | | | | | | | |
| This preview shows your s | elected Template an | d how dat | a will be treated for the i | imno | rt | | | | | |
| This preview shows your s | elected relipiate all | a now dat | a will be deated for the i | mpo | | | 0 | | | |
| Description: Optionally enter | r a description for this | mport | | | | You are u | sing Template: Import Bu | ıdget Up | dates | ~ |
| Date | Dimension | • | Ignore | T | Measure | • | Measure | • | | |
| dd-mmm-yy (01-Mar-12) | Product | • | | T | User Budget Amt 2 | • | User Budget Unit 2 | T | | |
| Date | Product | | Prod Long Description | | Expected Sales A | mount | Expected Sales Units | | | |
| 29-Dec- | 24 621A954011 | | Baby Carrots 1A | | | \$11,402 | | 265 | | |
| 29-Dec- | 24 621B954011 | | Baby Carrots 1B | | | \$22,804 | Ļ | 530 | | |
| 29-Dec- | 24 621C954011 | | Baby Carrots 1C | | | \$12,542 | | 291 | | |
| 29-Dec- | 24 621D954011 | | Baby Carrots 1D | | | \$13,683 | | 318 | | |
| 29-Dec- | 24 621E954011 | | Baby Carrots 1E | | | \$14,823 | | 344 | | |
| 29-Dec- | 24 621F954011 | | Baby Carrots 1F | | | \$15,963 | 3 | 371 | | |
| 29-Dec- | 24 621G954011 | | Baby Carrots 1G | | | \$17,103 | | 397 | | |
| 29-Dec- | 24 621H954011 | | Baby Carrots 1H | | | \$18,243 | | 424 | | |
| 29-Dec- | 24 6211954011 | | Baby Carrots 1I | | | \$19,384 | L | 450 | | |
| 29-Dec- | 24 6213954011 | | Baby Carrots 1J | | | \$20,524 | ł | 477 | | |
| 29-Dec- | 24 621K954011 | | Baby Carrots 1K | | | \$11,402 | | 265 | | |
| 29-Dec- | 24 623A954011 | | Baby Carrots 3A | | | \$11,211 | | 298 | | |
| 29-Dec- | 24 623B954011 | | Baby Carrots 3B | | | \$22,421 | | 596 | | |
| 29-Dec- | 24 623C954011 | | Baby Carrots 3C | | | \$12,332 | | 328 | | |

Import Configuration Window

This window is used to configure some details for data imports. The properties vary depending on the type of data source used for your import. Browse the topic below to learn about the different versions.

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.

Excel Spreadsheet

Here's a configuration window when an Excel spreadsheet is used for an import. Properties are described after this image.

| Import Configuration | | | | | | |
|---|----|--|--|--|--|--|
| Source Of Data For Import: Local File Source Type: Excel | | | | | | |
| Target Category: User Budget 🗸 🗸 | | | | | | |
| Format: Transactions 🗸 | | | | | | |
| Header Rows In File: 3 | | | | | | |
| Row That Contains Transaction Date: | | | | | | |
| Transaction Date Format: | | | | | | |
| OK Cancel He | lp | | | | | |

| 1 | Source Details – Information at the top of the window tells you about the type of source used for the import, which in this example is a Local File and Excel spreadsheet. | | | | | | | |
|---|---|--|--|--|--|--|--|--|
| 2 | 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. | | | | | | | |
| 3 | Format and Related Properties – Make selections about how your file is set up including the format and respective selections. 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 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 | | | | | | | |
| | Format: Transactions Header Rows In File: 3 Row That Contains Transaction Date: Transaction Date Format: 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. | | | | | | | |



CSV or Text File

The window for a CSV or Text file includes a property to set the Target Category for the import, Delimiter used in the file, and Field Quote type for the file. The default Delimiter is Coma and Field Quote is Double Quotes. You will be prompted for configuration details if your file doesn't use those format defaults.

| Import Configuration | | | | | | | |
|---------------------------------------|------|--|--|--|--|--|--|
| Source Of Data For Import: Local File | | | | | | | |
| Source Type: Text | | | | | | | |
| Target Category: User Budget 🗸 | | | | | | | |
| Delimiter: Coma 🗸 | | | | | | | |
| Field Quote: Double Quotes 🗸 | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| OK Cancel | Help | | | | | | |

SQL Server Database

The window includes a property to set the Target Category for the import.

| Import Configuration | | | | | | | |
|--|------|--|--|--|--|--|--|
| Source Of Data For Import: SQL Server Database | | | | | | | |
| Source Type: Table | | | | | | | |
| Target Category: User Budget 🗸 🗸 | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| OK Cancel | Help | | | | | | |

Azure Cloud Source

The window includes a property to set the Target Category for the import. Additional properties display if your source is a file in an Azure Blob Container or Azure File Share. Examples follow of the configuration window for an Azure SQL Database and Excel file in an Azure Blob Container.

First, here's the Azure SQL Database example.

| Import Configuration | × |
|---|------|
| Source Of Data For Import: Azure SQL Database | |
| Source Type: Table | |
| Target Category: User Budget V | |
| | |
| | |
| | |
| | |
| OK Cancel | Help |

Here's the window for an Excel file in an Azure Blob Container. It has the same type of Format and other properties as the ones described earlier in this topic for a <u>local Excel file</u>.

| Import Configuration | × |
|---|--------------|
| Source Of Data For Import: Azure Blob Container | |
| Source Type: Excel | |
| Target Category: User POS 🗸 🗸 |] |
| Format: Transactions 🗸 | |
| Header Rows In File: 1 | |
| Row That Contains Transaction Date: | |
| Transaction Date Format: | \checkmark |
| OK Cancel | Help |

Open Window

This window is used to choose the source file or table for a data import. Use it to choose the source of data for an import. The look of the windows varies depending on the type of source being used.

Excel, CSV, or Text File Open Window

This window is for choosing a local Excel, CSV, or Text file for an import. Click the Open button once you've selected the file for your import.

| 💽 Open | | | × |
|--|--|-----------------------------------|-------------------|
| $\leftarrow \rightarrow \vee \uparrow$. « | | V 🖸 Search Ki | ef 🔎 |
| Organize • New folder | | | ::: • 🔟 ? |
| Attachments | ^ Name | | Date modified |
| Desktop | Data For Budd | get Imports 2025 | 9/4/2024 10:28 AN |
| Documents | The second second | and the first stage for the State | |
| Email attachments | 1 martine fil | | |
| 📕 Karen | A state of the state | | |
| E Pictures | E + 144, 181 | | |
| Recordings | · · · · · · · · | | |
| Shared with Everyone | | | |
| 🙀 Silvon Software, Inc | B | | |
| This PC | | | |
| Intwork | | | |
| | V (| | > |
| File name: Data For Bu | dget Imports 2025 | ✓ Custom t | files ~ |
| | | Upload from mobile Ope | en Cancel |

SQL Server Database or Azure Cloud Sources Open Window

These windows are for choosing a local table or cloud-based file for an import. A couple examples follow. The source name will show at the top of the window. Clicking it refreshes the window's content. Click the OK button once you've selected the table or file for your import.

Here's an example of the Open window for SQL Server Database sources.

| | Open | x |
|-------------------------|-----------|---|
| Source DataSourceTables | | |
| Name 🛦 | | |
| Forecast Pro Output | | |
| Point of Sales 2024 | | |
| User Budget Next Year | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | OK Cancel | |

Here's a window for choosing a file from an Azure Blob Container. The windows for any Azure cloud source include breadcrumb links at the top. Click them if needed as a shortcut for going back to prior levels of folders you navigated through to get to the current location being viewed within the source.

| | Open | > | < |
|---------------------------|---------------------|----------|---|
| Source blob > Data Import | | | |
| Name 🛦 | Last Modified | Size | |
| 🔑 Excel Data Folder | | | |
| Forecast Pro Output.csv | 04/08/2024 17:32:50 | 2.14 Mib | |
| Point of Sales 2024.txt | 05/11/2023 16:38:35 | 2.00 Mib | |
| User Budget Next Year.txt | 02/15/2023 18:42:41 | 2.27 Mib | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | OK Cancel | | |

System Configuration Window

Customer Info & Keys Section

| | 1 | System Configuration | |
|----------|--|---|---|
| Customer | Info and Keys | | |
| | 2 Name: | My Company Environment | |
| G | lobal Home Page: | | |
| R | Registration Keys: | Stratum.Viewer | |
| | 3 | | |
| | - | Stratum Access Hub | 1 |
| | | Stratum Analyst Hub | ļ |
| | | | |
| | | Stratum Cloud Import | |
| | | | |
| Cı | ustomer Number: | | |
| | Customer Type: | Hosted | |
| 1 | Toolbar - • Sav • Helj Name - Use | e - Click to save changes to system configuration. p - Click to open help that is specific to working with system configuration. this field to customize the name that displays for the application in the browser title bar | |
| 4 | and tab. Global Hom home page would be me | The Page - Use this field to define a custom, global home page for Stratum.Viewer. The can open to a web site, document, directory, or other supplementary information that eaningful for users. | |
| | If you leave links to Strat | this field blank, the application home page defaults to a Stratum home page that has tum.Viewer videos and other resources. | |
| | If needed, a through sett | dministrators can define different home pages for particular users or user groups ings in the User Profile or User Profile Group windows. | |
| 3 | Registration specialized Silvon Supp | n Keys - A valid registration key is required for licensed copies of Stratum and functionality within it. If you receive a message about a missing or invalid key, contact ort at (800) 474-5866 or <u>CustomerSupport@silvon.com</u> . License keys are required for: | |
| | • Stra | ltum.Viewer | |
| | • Stra and | tum Access Hub, which includes the Stratum Broadcast Manager plus Excel exporting Stratum Power BI Connector functionality. | |
| | • Stra feat | tum Analyst Hub, which includes Planning, Data Import, and Master Data Import ures. | |

Stratum Cloud Import, which extends Data Import functionality to allow for <u>Data Steward</u> functionality and to import local SQL Server databases or Azure cloud sources.
 Customer Number - This is a unique identification number for your Stratum.Viewer implementation. Contact Silvon Support at (800) 474-5866 or <u>CustomerSupport@silvon.com</u> <u>mailto:</u>if you do not have a valid customer number.
 Customer Type – This is a read-only property. It tells you if the environment is Hosted or On-Premise.

System Generated Emails Section

| System Generated Emails | | |
|-------------------------|------------|--|
| SMTP Server: | | |
| Email From Address: | No-Reply | @silvoncloud.com |
| Broadcast Server: | Distribute | d Email Subject Prefix When No Data Exists |
| 3 | **No Dat | ta Exists** |
| | Process C | ompleted Email |
| | Address: | |
| | Subject: | Process Completed for Stratum Broadcast Schedule / Broadcast Group / Action |
| | Body: | See the attached log for information on the Stratum Broadcast Schedule / Broadcast Group / Action process. |
| | | Attach Process Log |
| | Process Fa | ailed Email |
| | Address: | |
| | Subject: | Process Failed for Stratum Broadcast Schedule / Broadcast Group / Action |
| | Body: | See the attached log for information on the Stratum Broadcast Schedule / Broadcast Group / Action process. |
| | | Attach Process Log |
| Data Imports: | Process C | ompleted Email |
| 4 | Address: | |
| | Subject: | Process Completed for Data Import |
| | Body: | See the attached log for information on the Data Import process. |
| | | Attach Process Log |
| | Process Fa | ailed Email |
| | Address: | |
| | Subject: | Process Failed for Data Import |
| | Body: | See the attached log for information on the Data Import process. |
| | | Attach Process Log |

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.

| | 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. |
|---|--|
| | 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. |
| 2 | Email From Address – This property is used by administrators to specify the email address that will show as the sender of Data Import processing notification emails. |
| | An address must be specified if you want Data Import processing emails to be sent. |
| | If your environment is a hosted environment, you should use <u>No-Reply@silvoncloud.com</u> as the Email From Address. |
| | Note: Processing emails for Actions, Broadcast Groups, and Broadcast Schedules will still be sent even if you don't specify this Email From Address – for those items, the "From" email is the email of the Stratum user who interactively processed the Action, Broadcast Group, or Broadcast Schedule from Viewer. When those items are scheduled to be processed in batch, the "Email From Address" in System Configuration is the sender of the email by default. If an address isn't specified, the scheduled process will use the email address of the account used to run the batch job or you can specify an email using an optional "FromEmailAddress" parameter specific to batch jobs. More details are in the section of help dedicated to Actions, Broadcast Group, and Broadcast Schedule topics. |
| 3 | Broadcast Server email properties are described below. These are sent when actions, broadcast groups, and broadcast schedules are processed from Stratum.Viewer. Typical recipients you might specify are Broadcast Manager administrators or other interest parties who need to know what's happening with the Broadcast Manager. |
| | Distributed Email Subject Prefix 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. |
| | 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. |
| | 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. |
| | 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 the 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. |
| | For each type of email, specify the email addresses, subject, and body text for the messages. Use a semicolon or comma to separate email addresses if you specify more than one recipient. |
| | Processing logs can be attached to these emails to provide more detailed information about a process. |

4

Data Import email properties are described below. These are sent when data imports are processed from Stratum. Viewer as long as you also have specified an Email From Address in the System Configuration window. Typical recipients you might specify are administrators, Data Stewards or other interested parties who need regular visibility into what's happening with the Stratum Analyst Hub's Data Import.

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 the processing of Data Imports. Process Completed emails indicate a process completed. Process Failed emails indicate a process failed. The emails give greater visibility into what's happening with Data Imports.

For each type of email, specify the email addresses, subject, and body text for the messages. Use a semicolon or comma to separate email addresses if you specify more than one recipient.

Processing logs can be attached to these emails to provide more detailed information about a process. For hosted environments, Silvon has validations in place to prevent processing logs from being attached to system-generated emails if a recipient's email isn't associated with Silvon's hosted domain for Stratum Cloud. This protects sensitive information from being shared with non-administrators or outside email addresses. For example, logs would only be sent to emails from @silvoncloud.com or @silvon.com.

Process Options Section

| Process Options | |
|---|---|
| Broadcast Se | erver: Override Log File Location For Broadcast Process (specify new location below) |
| 2 Data Imp | Doorts: Master Data Import Upload File Location Data Import Upload File Location |
| | |
| Overrie used to the pro in the * | de Log File Location For Broadcast Process – This Broadcast Server property can be o customize where log files from Broadcast Server processing are stored. The logs are from cessing of broadcast schedules, broadcast groups, and actions. By default, logs are stored \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.

| 0 | |
|-----|--|
| ·) | |
| ~ | |
| _ | |

Upload File Locations – The properties in the **Data Imports section** are 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.

- When specifying a location, use the full UNC path format \\host-name\sharename\file_path\ and include a backslash mark \ as the final character. For example: \\serverabc\User Controlled Data\Uploaded Import Files\
- 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. To support Data Imports where CSV or Text files are the data source, the Data Import Upload File Location should be on the same server as where the Stratum.Server database resides.

The locations must be ones that exist already and ones 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.

Cloud Import Locations Section

| Cloud Import L | ocations | |
|-----------------------|---|---|
| Azure Blob | Container: | Folder Name |
| | | |
| | | Signature |
| | | |
| Azure | File Share: | Folder Name |
| | | |
| | | Signature |
| | | |
| Azure SQI | L Database: | Connection String |
| | | |
| Local SQL Serve | r Database: | Connection String |
| 2 | | |
| 9 | | |
| 1 Da for for | ata Importe r Stratum r supplying | s using data from Azure cloud sources is only allowed if your environment is licensed Cloud Import. Use the applicable fields provided in this section of System Configuration g connection details about Azure sources for your imports. |
| | • Azu | re Blob Container – enter Folder Name and Signature details. |
| | • Azu | re File Share – enter Folder Name and Signature details. |
| | • Azu | re SQL Database – Enter the Connection String. |
| *N im the de | lote: Exist ports from e appropri etail fields | ing knowledge and experience with Azure is required when setting up Stratum to do Azure cloud sources. Use your knowledge of your Azure implementation to determine ate URL, connection string, and folder details to copy from Azure into the connection in System Configuration. |
| 2 Da lice Co | Data Imports using data from local SQL Server databases are only allowed if your environment is licensed for Stratum Cloud Import. Use the applicable field provided in this section of System Configuration for supplying connection details about that type of source for your imports. | |
| Lo | ocal SQL | Server Database – Enter the Connection String. |

Microsoft Analysis Services Section

| Microsoft Analysis Service | 15 |
|--|------------------------------|
| Connection Pool Properties: Idle Connection Time Limit | |
| | 600 |
| | Maximum Connections Per Role |
| | 5 |
| Connection Time Limit: | 600 |

Connection Pool Properties - 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.

- 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.
- **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.

Connection 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.

Advanced Concepts

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.

Note: Data Import templates that apply previously saved mapping and configuration details are another way to save time when setting up imports. See the topic <u>Data Import Templates</u>.

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

| | | | Data Mapping | - Data Import | | | | | | |
|--|---|---------------------------------|------------------------|---------------|------------------------|---|----------------|-----------------|----------|--|
| e the Configuration options and Mapping preview to tell us how to treat data for the import. | | | | | | | | | | |
| Description: Optionally enter a | Description: Optionally enter a description for this import | | | | | | | | | |
| Click Process to import your da | ata or click Add Template first to s | ave mapping for future use. Add | Template | | <u> </u> | | | | _ | |
| Date 🔻 | Dimension V | Dimension V | Ignore 🗸 🔻 | Dimension | ▼ Ignore | ▼ | Measure 🔻 | Measure | v | |
| yyyy-mm-dd (2012-03-01) 🔻 | Distribution Center Ware | Distribution Channel | ▼ | Product Brand | v) | ▼ | User POS Amt 1 | User POS Unit 1 | ۰J | |
| Date | Distribution Center Warehous | e Distribution Channel | DsChn Long Description | Product Brand | PBrnd Long Description | | Sales Amount | Sales Units | | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 001 Tip Top | | \$1,108,906 | 1 | 5,532 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 102 Dew Drop | | \$121,542 | | 4,490 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 003 SuperSweet | | \$375,370 | | 9,346 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 005 Farm Crisp | | \$188,173 | | 4,398 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 008 Bing-a-ling | | \$246,280 | | 3,665 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 009 Farm Fresh | | \$431,418 | | 8,293 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 10 Prime Grown | | \$238,915 | | 3,894 | |
| 2023-12-29 | 1 | 9 DIR | Direct | (| 12 Home Cookin' | | \$823,041 | | 9,576 | |
| 2023-12-29 | 1 | 9 DIR | Direct | 9 | 999 Private Label | | \$392,464 | | 7,697 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | 0 | 001 Tip Top | | \$536,775 | | 7,376 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | 0 | 002 Dew Drop | | \$801,359 | 1 | 3,607 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | (| 003 SuperSweet | | \$176,391 | | 4,353 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | (| 004 Idaho Delight | | \$532,004 | 1 | 4,478 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | (| 006 Southern Sweet | | \$479,862 | | 7,835 | |
| 2023-12-29 | 1 | 9 INB | Indirect - Broker | (| 109 Farm Fresh | | \$4 284 709 | 7 | 0 786 | |

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.

| Description: Optionally enter a description for this import | | | | | | | | |
|--|-------------------------------|-----------|--|--|--|--|--|--|
| Click Process to import your data or click Add Template first to save mappir | | | | | | | | |
| Date 🔻 | Dimension 🔹 | Dimensio | | | | | | |
| yyyy-mm-dd (2012-03-01) 🔻 | Distribution Center Ware 🔻 | Distribut | | | | | | |
| Date | Distribution Center Warehouse | Distribut | | | | | | |
| 2023 12 29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | DIR | | | | | | |
| 2023-12-29 | 19 | INB | | | | | | |
| 2023-12-29 | 19 | INB | | | | | | |
| 2023-12-29 | 19 | INB | | | | | | |
| 2022 12 20 | 10 | TAID | | | | | | |

Choose A Different Template For Your Import

Sometimes, multiple templates are valid for the same import. When you pick a template to use with your import and click Preview, the name of the selected template shows in the upper right section of the Data Mapping window. If other valid templates exist for your import data, the name area will be a drop-down list. Use the list to see other valid templates and switch to another template. Remember to process your import after changing the template selection.

Data Import Templates

Data Import Templates are a time-saving feature. They conveniently capture details for mapping transactional data to your Stratum Data Model. Templates can be re-used as often as you like for subsequent imports of similar data. They're ideal for handling data from the same category or import source that's updated regularly over time as new data becomes available — saving you from manually managing repetitive tasks for each round of data you import into the Stratum Data Hub. Templates can be used for imports done from Stratum Viewer or with the Stratum Cloud API.

Templates tell Stratum about your data — the type of file it's being imported from, the category it's for, and the transaction date format. And, they tell Stratum how to treat the data during an import — such as identifying the target measures to import data into and whether to replace or add to existing category data.

Templates can handle schema shifts as part of their automatic data mapping features, making for smooth handling of structural changes to your transactional data.

As you build your library of templates and initiate new data imports, Stratum will recommend templates that are a match for your next import. Pick a template to handle mapping steps for you, then process the import. You can optionally preview the import to see how it looks with the selected template applied to it and to give your import a custom description. See also Add A Data Import Template.

| | | Data Mar | ning - Data Import |
|---|--|--|--|
| | | Data Import - Template Selection | × |
| U | The following Data Import Template(s) match the Ca review it or Process to proceed with the import. If yo | ategory that will be selected for your import source. Plea ou do not want to use any of these Templates, please sel | se select one and click Preview to lect "None" and click Preview. |
| | Name 🔺 | Description | Owner Last Us |
| ٦ | 🖌 Point of Sales Data, Amounts and Units | Data for POS by Territory | Karen Sharpey |
| ٩ | □ Weekly Point of Sales Data | Data provided by regional retailers | Donna Farris 5/4/20 |
| | □ None | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | • | | • |
| | | Process Preview Cancel | |

This Point of Sales import uses a Data Import Template we created while setting up a previous import. There's new data to import from an Excel file.

Stratum Viewer shows us templates that exist for the category. We picked one, previewed our new data with it in the Data Mapping window, and processed the import from there.

0000

This preview shows your selected Template and how data will be treated for the import.

| Description: Importing more r | Description: Importing more recent point of sales data | | | | | | You are using Template: Point of Sales Data, Amounts and Units | | | | |
|-------------------------------|--|----|-------------------|----------------------|----------|----------------|--|--|--|--|--|
| Date 🔻 | Dimension | • | Dimension 🔻 | Ignore | <u> </u> | Measure V | Measure | | | | |
| yyyy-mm-dd (2012-03-01) 🔻 | Ship-To Region | • | Ship-To Territory | | • | User POS Amt 4 | User POS Unit 4 | | | | |
| Days | Ship-To Region | | Ship-To Territory | STerr Long Descr | iption | User POS Amt 4 | User POS Unit 4 | | | | |
| 2023-01-03 | | 50 | 1104 | New England | | 15781.52774 | 3983.57996 | | | | |
| 2023-01-03 | | 50 | 1105 | Great Lakes | | 1605.0991 | 456.91162 | | | | |
| 2023-01-03 | | 51 | 1102 Gulf Coast | | | 2956.05974 | 1276.89263 | | | | |
| 2023-01-03 | | 51 | 1103 | Midlantic | | 7347.29324 | 1987.53808 | | | | |
| 2023-01-03 | | 52 | 1101 | South Central | | 10326.19418 | 2537.59532 | | | | |
| 2023-01-03 | | 52 | 1106 | Great Plains | | 7382.35997 | 1992.38091 | | | | |
| 2023-01-03 | | 53 | 1100 | Southwest | | 6714.50692 | 1600.03024 | | | | |
| 2023-01-03 | | 53 | 1107 | Northwest | | 3508.27814 | 1604.05577 | | | | |
| 2023-01-03 | | 54 | 1111 | Eastern Atlantic Pro | vinces | 10741.56617 | 2593.94681 | | | | |
| 2023-01-03 | | 55 | 1108 | Western Provinces | | 4009.60886 | 1754.64454 | | | | |
| 2023-01-03 | | 55 | 1109 | Central Provinces | | 7197.50859 | 1882.43146 | | | | |
| 2023-01-13 | | 50 | 1104 | New England | | 15781.52774 | 4 3983.57996 | | | | |
| 2023-01-13 | | 50 | 1105 | Great Lakes | | 1605.0991 | 456.91162 🗸 | | | | |
| • | | | | | | | | | | | |

Data Mapping - Data Import

Imports Where Stratum Master Data Doesn't Exist

Import files and tables 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 source 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 source.

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 <u>Data Mapping preview</u> 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 or table 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 then reviewing your import source 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.

| | STRATUM.VIEWER | × |
|---|---|---|
| ⚠ | Your import file contains Master File value(s) that don't currently exist in Stratum. When this data is imported, all the necessary Stratum Master File records will be created for you. If you have unexpected missing Master File records, verify your dimension column mappings and the content of your import file before continuing. | |
| | | |

Here's an example import that caused a message to display 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.

| | S | TRATUM.V | IEWER | | × | | | | |
|---|-----------|----------|----------------------|------------------|-------|---------------------------------------|--------------------------|--|------------------------|
| Your import file contains Master File value(s) that don't currently exist in Stratum. When this data is imported, all the necessary Stratum Master File records will be created for you. If you have unexpected missing Master File records, verify your dimension column mappings and the content of your import file before continuing. | | | | | | Click the Configu an what's provid | iration bu led in the | tton if the pr preview lists OPreview of | eview frows 1 - 100 |
| | | | | | | Ignore | Ŧ | Measure | v |
| yyyy-mm-dd | RepBroker | | Distribution thannel | Customer Sold-To | | | Ŧ | User POS Unit 1 | |
| Weeks | RepBroker | | Distribution hannel | Customer Sold-To | | SIdTo Long Descriptio | on | Units 1 | l |
| 2019-01-06 | | | INB | | 15010 | WILDER FOODS EAST | ERN AMERIC | | 554,368 |
| 2019-01-06 | | | INB | | 15011 | Wilder Foods Western | Americ | | 502,875 |
| 2019-01-06 | | 301 | INW | | 15025 | 0 Prestwick Brothers | | | 35,920 |
| 2019-01-06 | | 302 | INW | | 15024 | 0 Olivieri Distributors | | | 103,740 |
| 2019-01-06 | | 302 | INW | | 15028 | 0 New York Foods | | | 30,812 |
| 2019-01-06 | | 302 | INW | | 15030 | 0 Auburn Providers | | | 20,723 |
| 2019-01-06 | | | INW | | 15035 | 0 Chicago's Finest | | | 34,203 |
| 2019-01-06 | | | INW | | 15038 | 0 Packingham Foods | | | 21,267 |
| 2019-01-06 | | 304 | INW | | 15026 | Dallas Food Services | | | 35,250 |
| 2019-01-06 | | 304 | INW | | 15037 | 0 Southwest Foods | | | 28,719 |
| 2019-01-06 | | | INB | | 15015 | 0 Harrington's Eastern | | | 222,467 |
| 2019-01-06 | | | INB | | 15016 | 0 Harrington's Western | | | 99,805 |
| 2019-01-06 | | 306 | INW | | 15031 | 0 Maple Tree Foods | | | 26,458 |
| 2019-01-06 | | 306 | INW | | | 2 | | | 17,413 |
| 2019-01-06 | | 306 | INW | | 15032 | 0 Quebec Foods | | | 24,951 |
| 2019-01-06 | | 306 | INW | | 15034 | 0 Alberta Foods | | | 7,954 |
| 2019-01-06 | | | INW | | 15039 | 0 Pacific Providers | | | 13,564 |
| 2019-01-06 | | | INW | | 15023 | 0 Penn Brands | | | 46,972 |
| 2010-01-06 | | 300 | TNIA/ | | 15014 | Midwest Providers | | | /2 157 |

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 V | Ignore 🗸 🗸 | Measure |
| • | Distribution Channel | Customer Sold-To | T | User POS Unit 1 |
| | Distribution Channel | Customer Sold-To | SIdTo 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.

| ļ | AutoSave 💽 🖪 🤌 🖓 🗧 🗧 🛛 😨 — 🗆 🔿 | | | | | | | | | × | | | | | | |
|----|--------------------------------|-------------------|-----------|----------------|-------|--------|---------|------|---------------|----------|---------------------------------------|------------|-----------|-----------|----------|-----------|
| Fi | e Home | Insert | Page Layo | ut Formulas | Data | Review | View | Add- | ins Help | PDF | ACROBAT | Team | 𝒫 Tell me | 🖻 Share | Comment | ts |
| A3 | 7 👻 | : x | √ fx | 2019-01-13 | | | | | | | | | | | | ¥ |
| | | | | | | | | | | | | | | | | |
| | A | E | 3 | С | | | D | | | | E | | F | G | <u> </u> | |
| 1 | Weeks | RepB | roker E | istribution Ch | annel | Custon | ner Sol | d-To | | o Long | Description | | Units 1 | Units 2 | Returns | \square |
| 2 | 2019-01-06 | 300 | INB | | | 150100 | | | | 5005- | - EASTERN | | 554,368 | 8,712,683 | (42440) | |
| 3 | 2019-01-06 | 300 | INB | | | 150110 | | | Wilder Foo | ds We | estern Americ | | 502,875 | 7,681,556 | (32380) | |
| 4 | 2019-01-06 | 301 | INV | / | | 150250 | | | Prestwick E | Brothers | | | 35,920 | 552,802 | (23497) | |
| 5 | 2019-01-06 | 302 | INV | / | | 150240 | | | Olivieri Dist | ributors | i i i i i i i i i i i i i i i i i i i | | 103,740 | 2,076,393 | (78740) | |
| 6 | 2019-01-06 | 302 | INV | / | | 150280 | | | New York F | oods | | | 30,812 | 508,597 | (1020) | |
| 7 | 2019-01-06 | 302 | INV | / | | 150300 | | | Auburn Pro | viders | | | 20,723 | 442,977 | (2946) | |
| 8 | 2019-01-06 | 303 | INV | / | | 150350 | | | Chicago's F | inest | | | 34,203 | 466,698 | (10876) | |
| 9 | 2019-01-06 | 303 | INV | / | | 150380 | | | Packinghar | n Foods | ; | | 21,267 | 325,616 | (2243) | |
| 10 | 2019-01-06 | 304 | INW | / | | 150260 | | | Dallas Food | d Servic | es | | 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 | s East | tern | | 222,467 | 1,658,173 | (12213) | |
| 13 | 2019-01-06 | 305 | INB | | | 150160 | | | Harrington's | s Wes | stern | | 99,805 | 787,213 | (7885) | |
| 14 | 2019-01-06 | 306 | INV | / | | 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 | INV | 1 | | 150320 | | | Quebec Fo | ods | | | 24,951 | 306,117 | | Ľ |
| 17 | 2019-01-06 | 306 | INW | / | | 150340 | | | Alberta Foo | ds | | | 7,954 | 58,939 | | |
| 18 | 2019-01-06 | 307 | INW | / | | 150390 | | | Pacific Prov | viders | | | 13,564 | 140,486 | (952) | |
| 19 | 2019-01-06 | 308 | INW | / | | 150230 | | | Penn Brand | ds | | | 46,972 | 665,734 | (8701) | |
| 20 | 2019-01-06 | 309 | INW | / | | 150140 | | | Midwest Pr | oviders | | | 42,157 | 922,597 | (62765) | |
| 21 | 2019-01-06 | 312 | DIR | | | 150120 | | | Sumpter Di | st'n E | astern Divi | | 153,265 | 2,774,653 | (45091) | |
| 22 | 2019-01-06 | 312 | DIR | | | 150130 | | | SUMPTER | DIST'N | WESTERN | | 88,878 | 1,631,267 | (78468) | |
| 23 | 2019-01-06 | 313 | INB | | | 150170 | | | GOODFOC | DS E | ASTERN | | 102,023 | 886,938 | (41670) | |
| 24 | 2010 01 06 | 1212 okly Data | | | | 150190 | | | GoodEood | 10/00 | torn | | 155 350 | 1 210 095 | (30044) | <u> </u> |
| | vve | CRIY Data | To import | (+) | | | | | | : | • | | | | | P |
| Ē | | | | | | | | | Average: 248 | 094.9834 | Count: 8 Sum: 7 | 44284.9502 | | ──── | + 90 | 3% |

Review Dimension Details For A Target Category

The <u>Data Mapping window</u> for previewing and mapping imports to Stratum includes an Information button in the toolbar. Click it to see details about the import's <u>Target category</u> and its dimensions. A Data Import Information window opens. If you're using a template for the import, a Template tab shows you details about the template. The Category tab 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 Data Import Information Window topic for complete details.

| Use the Configuration option | is and Mapping preview to tel | ll us how to treat data for the | Data Mapping - D | ata Import | | | | |
|--|-----------------------------------|---------------------------------|------------------|--------------------|-----------------------|--|--|--|
| Description: Optionally enter a description for this import Configuration Delete Category Data Before Import | | | | | | | | |
| Click Process to import your da | ta or click Add Template first to | save mapping for future use. A | dd Template | | | | | |
| Date 🗸 🗸 | Dimension V | Dimension V | Ignore 🗸 🗸 | Dimension V | Ignore | | | |
| yyyy-mm-dd 🛛 🔻 | Distribution Channel | Product Class | ▼ | Product Category | | | | |
| Days | Distribution Channel | Product Class | Description | Product Category | Description | | | |
| 2019-01-03 | DIR | В | Branded | 200 | Fresh Vegetables | | | |
| 2019-01-03 | DIR | В | Branded | 201 | Canned Fruit | | | |
| 2019-01-03 | DIR | В | Branded | 202 | Pork | | | |
| 2019-01-03 | DIR | В | Branded | 203 | Beef | | | |
| 2019-01-03 | DIR | В | Branded | 204 | Fresh Fruit | | | |
| 2019-01-03 | DIR | В | Branded | 207 | Frozen Fruit Products | | | |
| 2019-01-03 | DIR | В | Branded | 208 | Frozen Prepared Dinne | | | |
| 2019-01-03 | DIR | 0 | Other | 200 | Fresh Vegetables | | | |
| | 1 | 1 | | | | | | |

| Da | ata Import Information | × |
|--|---|----------|
| Category | | User POS |
| Dimension | Source | |
| Product Mkt Prod Class | None | |
| Product Primary Buyer | None | |
| Product Primary Planner | None | |
| Product Promotion | None | |
| Product Purchasing UM | None | |
| Product User Controlled Buyer | None | |
| Product Brand | None | |
| Product Category | Import File | |
| Product Category Role | Sourced from Product Category Previous Level definition | |
| Product Class | Import File | |
| Product Class User Controlled PClas Department | Always sourced from a Product Class Attribute | |
| Product Class User Controlled PClas Promotion Code | Always sourced from a Product Class Attribute | |
| Product Family | None | |
| Product Group | None | |
| Product Group User Controlled PGrp Marketing Code | None | |
| Product Group User Controlled PGrp Sales Division | None | |
| Product SubClass | None | |
| Product Type | None | |
| Product Type Short Description | None | |
| Region | None | |
| RepBroker | None | - |
| | ОК | Help |

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 <u>Target category</u> 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 if the import was processed from the Stratum.Viewer user interface for imports or by the Stratum Cloud Import API along with the status of the different stages of processing for a Data Import. If you used a template to handle the import mapping and configuration, then basic information about the template shows in the report. 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 type of import source and name of the import file or table, who created and processed the import, and when it was processed. The Template section is populated with configuration information if you used a template. If you didn't use a template, the Import Configuration section is populated with details. You'll also see processing stage summaries for the import's major processing stages. The summary for each includes its status, start date/time, and end date/time. Stages include re areSave User Mapping, Validate Applied Template (if one was used for the import), Data Validation, Common Area To Fact Table, Validate Master Record, and Fact Table To Cube. Fact tables are where imported data is stored.

| ķ | AutoSave Off | ∽ <⊂ ∽ ∓ Holiday P | eriod Coupon Popup Events • Saved | to this PC \checkmark | Q | | - | | × |
|----|----------------------------|-------------------------------|-----------------------------------|-------------------------|---------|---------|---|----------|------------|
| | File Home Insert F | Page Layout Formulas | Data Review View Automa | te Help | Stratum | Acrobat | | P | 哈 ~ |
| E | 34 ~ : X ~ | $f_X \sim$ | | | | | | | ^ |
| | | | | | | | | | |
| | A | | В | | | | | С | |
| 1 | | Data Import Processing Det | ails: | | | | | | |
| 2 | | | | | | | | | - 8 |
| 3 | Source of Data For Import: | Local File | | | | | | | - 8 |
| 4 | Source Name | Holiday Period Coupon Popup | Events 2024.xlsx | | | | | | - 11 |
| 5 | Description: | Various Holiday or Other Pop- | up Event Sales | | | | | | - 8 |
| 6 | Process Mode: | User Interface | | | | | | | - |
| 1 | Data laura est Statuta | Completed | | | | | | | |
| 8 | Data Import Status: | Completed | | | | | | | |
| 9 | Owner: Submitted: | Naren Snype | | | | | | | |
| 10 | Submitted: | 09/05/2024 10.59.14 | Selections You | | | | | | |
| 12 | Completed. | 09/05/2024 17:00:45 | Made In Import | | | | | | |
| 12 | Tomplate: | | Configuration | | | | | | |
| 14 | remplate. | | Window | | | | | | |
| 15 | Import Configuration: | | window | | | | | | |
| 16 | Delete Data Before Import | No | | | | | | | |
| 17 | Target Category | User POS | | | | | | | |
| 18 | Format | Transaction | | | | | | | |
| 19 | Header Rows In File: | 1 | | | | | | | |
| 20 | | | Summer Of | | | | | | |
| 21 | Processing Details: | | Summary Or | | | | | | |
| 22 | Stage: | Save User Mapping | Processing Stages | | | | | | |
| 23 | Process Status: | Completed | | | | | | | |
| 24 | Start Date: | 09/05/2024 16:59:14 | | | | | | | |
| 25 | Completed Date: | 09/05/2024 16:59:14 | | | | | | | |
| 26 | | | | | | | | | |
| 27 | Stage: | Data Validation | | | | | | | |
| 28 | Process Status: | Completed | | | | | | | |
| 29 | Start Date: | 09/05/2024 16:59:14 | | | | | | | |
| | < > Data Imp | ort Detail + | : | | | | | | • |
| Re | ady 🐻 😵 Accessibility: Go | ood to go | | | | 四 | | + | 70% |

After the stage details, the report shows each column in your import file and how it was mapped to Stratum items in the <u>Data Mapping window</u>. The section indicates 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.

| 🗴 AutoSave 🔵 Off | 📕 🎾 🗸 🤍 🤜 Holiday Period | I Coupon Popup Events • Saved to this PC \sim | - 0 × |
|--|---|--|---------|
| File Home Insert | Page Layout Formulas Data | Review View Automate Help Stratum | Acrobat |
| E34 ~ : × · | $\checkmark f_x \checkmark$ | | ^ |
| 47 Completed Date: | 09/05/2024 17:00:45 | В | C |
| 49 Data Mapping: 50 Caption: 51 Type 52 Target 53 Caption: 54 Type 55 Target 56 Caption: 57 Type 58 Target 59 Caption: 60 Type 61 Target 62 Caption: | Dates Date yyyy-mm-dd (2012-03-01) Distribution Center Warehouse Dimension Distribution Center Warehouse Distribution Channel Dimension Distribution Channel Product Brand Dimension Product Brand Sales Amount | Selections You Made In Data Mapping Window For Each Import Column | |
| Caption: Caption: | Measure User POS Amt 1 Sales Units Measure User POS Unit 1 mport Detail + y: Good to go | | □+ 70% |

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.

| 🗴 AutoSave 💽 Off | ℃. Ar | bliday Period Coupon Popup Events | s • Saved to this PC \sim | Q | - | o x |
|-----------------------------|---------------------------|-----------------------------------|-----------------------------|-------------|-------|-----|
| File Home Insert | Page Layout Formu | Ilas Data Review View | Automate Help | Stratum Aci | robat | ₽ ¢ |
| E34 v : × ✓ | $f_X \sim$ | | | | | ^ |
| 72 Type A 73 Target | weasure User POS Amt 4 | Total Rows Imported | | | | C A |
| 7: Number of Rows Imported: | 2513 | | | | | |
| 76 77 Target Dimensions: | Mapped | | | | | |
| 78 ABC Classification Code | None | | | | | |
| Accounting Group | None | Dimensions In | | | | |
| 81 Buyer | None | Target Category | | | | |
| 82 Commodity Code | None | | | | | |
| 83 Company | None | | | | | |
| 84 Currency | None | | | | | |
| 8t Customer Class | None | | | | | |
| an Nustomer Parent | | | | | | |
| < > Data Imp | ort Detail + | | | | | • |

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 source. 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 source 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).

| 🗴 AutoSave 💽 Off | \checkmark \checkmark \checkmark Holiday Period Coupon Popup Events • Saved to this PC \checkmark \checkmark | - | o x |
|-----------------------------|--|------|-------|
| File Home Insert F | Page Layout Formulas Data Review View Automate Help Stratum Acr | obat | ₽ ₫ • |
| E34 ~ : × ✓ | $f_{\mathbf{x}} \sim$ | | ^ |
| A | B | | C 🔺 |
| 91 Customer Ship-To | None | | |
| 92 Customer Ship-To Country | None | | |
| 93 Customer Ship-To Postal | None | | |
| 94 Customer Ship-To Sales | None | | |
| 95 Ship-To State | None | | |
| 96 Customer SIC Code | None | | |
| 97 Customer Sold-To | None | | |
| 8 Customer Type | None | | |
| 9 Distribution Center | Import File | | |
| Distribution Center | Always sourced from a Distribution Center Warehouse Attribute | | |
| 101 Distribution Channel | Import File | | |
| 102 Division | Neng | | |
| 103 Division City | None | | |
| 104 Lot | None | | |
| 105 Planner | None | | |
| 106 Product | None | | |
| 107 Product ABC Class | None | | |
| 108 Product Commodity Code | None | | |
| 109 Product Mkt Prod Class | None | | |
| 110 Product Primary Buyer | None | | |
| 111 Droduot Drimony Diannor | None | | • |
| < > Data Impo | | | Þ |
| Ready 🐻 🎲 Accessibility: Go | bood to go | | |

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

Data Mapping - Data Import ptions and Mapping preview to tell us how to treat data for the import. Use the Cor Description: Various Holiday or Other Pop-up Event Sales Configuration Delete Category Click Process to import your data or click Add Template first to save mapping for future use. Add Template Dimension Ŧ Dimension Date v Dimension ¥ v Ignore Product Brand Distribution Center Ware... Distribution Channel T yyyy-mm-dd T T Dates Distribution Center Warehouse Distribution Channel **DsChn Long Description** Product Brand 19 DIR 2023-12-29 Direct 2023-12-29 19 DIR Direct 2023-12-29 Direct
Send Automatic Email Notifications About The Processing of Data Imports

Options are available to automatically send emails to designated recipients that tell them about processing of Data Imports. Use properties in the System Configuration window to set up the emails. Process Completed emails indicate a process has completed. Process Failed emails indicate a process has failed. Typical recipients of the emails will be administrators, Data Stewards or other interested parties who need regular visibility into what's happening with the Stratum Analyst Hub's Data Import.

- 1. Click Manage Things then System Configuration from the main menu in the top panel of Stratum.
- 2. Scroll to the System Generated Emails section of the System Configuration window.
- 3. Specify an email for the "Email From Address" property. It acts as the "From" email for Data Import generated emails. No Data Import processing emails will be sent if this property is left blank. If your environment is a hosted environment, you should use <u>No-Reply@silvoncloud.com</u> as the Email From Address. See also <u>Specify An Email From Address For System Generated Emails</u>.
- 4. In the Data Imports properties section, set up the applicable properties for the Process Completed Email and Process Failed Email.
 - For each type of email, specify the email addresses, subject, and body text for the messages. Use a semicolon or comma to separate email addresses if you specify more than one recipient.
 - Use the Attach Process Log property for each email type if you want to include logs with the email, which
 provide more detailed information about a process.*

*Note: For hosted environments, Silvon has validations in place to prevent processing logs from being attached to system-generated emails if a recipient's email isn't associated with Silvon's hosted domain for Stratum Cloud. This protects sensitive information from being shared with non-administrators or outside email addresses. For example, logs would only be sent to emails from @silvoncloud.com or @silvon.com.

Specify An Email From Address For System Generated Emails

The Email From Address property in the System Configuration window is used by administrators to specify the email address that will show as the sender of Data Import processing notification emails.

- An address must be specified if you want Data Import processing emails to be sent.
- Processing emails for Actions, Broadcast Groups, and Broadcast Schedules will still be sent even if you
 don't specify this Email From Address for those items, the "From" email is the email of the Stratum user
 who interactively processed the Action, Broadcast Group, or Broadcast Schedule from Viewer. When those
 items are scheduled to be processed in batch, the "Email From Address" in System Configuration is the
 sender of the email by default. If an address isn't specified, the scheduled process will use the email
 address of the account used to run the batch job or you can specify an email using an optional
 "FromEmailAddress" parameter specific to batch jobs. More details are in the section of help dedicated to
 Actions, Broadcast Group, and Broadcast Schedule topics.
- 1. Click Manage Things then System Configuration from the main menu in the top panel of Stratum.
- 2. Scroll to the System Generated Emails section of the System Configuration window.
- In the Email From Address field, specify the email address to use. If your environment is a hosted environment, you should use <u>No-Reply@silvoncloud.com</u> as the Email From Address. See also Specify An Email From Address For System Generated Emails.
- 4. Save 🔚 the changes.

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 source 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 <u>Examples section</u> of this Data Import help. If you have questions about where data ends up, <u>review the processing report</u> 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 <u>Target category</u>.

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/ Table Dimensions

- Dimensions that are mapped to a column of data from the import source
- All values come directly from the import source
- "Import File" shows as their data source in the import processing report. They come from your import source (files or tables).

Previous Level Dimensions

- Dimensions that have associations with other dimensions through Stratum previous level relationships
- Their data is derived from another dimension based on Stratum previous level details
- "Sourced from ... Previous Level Definition" shows as their data source in the import processing report

Attribute-Based Dimensions

- Also known as virtual dimensions; they're created from the attribute of another dimension
- Only affected if the parent dimension they're based on get updated by the import
- "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 source or that cannot be derived from other dimensions are updated with <u>their default value</u>. The source for these dimensions is "None" in the import processing report.

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

| | | - | | _ | Data | a Mapping · | - Data I | Import | | | | | |
|--|---|-----------|----------|-----------|------|---------------|----------|---------------|-----|-------------------------|-------------------------|-----------------|----|
| Use the Co Description Click Proce | See How Dimensions Will be the Configuration options and rescription: Adding Data For Forecasti Lick Process to import your data or click Add Template first to save mapping for future use. Add Template | | | | | | | | | | | | |
| Date | • | Dimension | • | Dimension | • | Dimension | • | Dimension | • | Measure 🔻 | Measure | • | |
| yyyy-mm-d | id (2012-03-01) 🔻 | Region | • | RepBroker | • | Product Group | • | Product Brand | • | User Forecast Unit 2 | User Forecast Unit 1 | • | |
| Date | | Region | | RepBroker | | Product Group | | Product Brand | | Units 2 For Forecasting | Units 1 For Forecasting | | I. |
| 2024-01-01 | | | 330 | | 313 | | 10 | | 008 | 17,593 | 1 | 3,661 | |
| 2024-01-01 | | | 330 | | 313 | | 10 | | 002 | 23,091 | . 1 | 17,930 | |
| 2024-01-01 | | | 330 | | 313 | | 10 | | 005 | 27,764 | 2 | 1,558 | |
| 2024-01 | | | 330 | | 313 | | 10 | 1 | 004 | 14,340 | 1 | 1,135 | |
| 2024-01- | | | 330 | | 313 | | 10 | | 999 | 87,142 | | 57,664 | |
| 2024-01- | Mappe | ed | 330 | | 313 | | 10 | | 006 | 22,267 | 1 | 17,289 | |
| 2024-01- | Dimensi | ons | 330 | | 313 | | 10 | | 007 | 20,296 | 1 | 5,760 | |
| 2024-01- | Differior | 0115 | 330 | | 313 | | 10 | | 003 | 41,509 | 3 | (2,231 | |
| 2024-01- | | | 330 | | 313 | | 10 | | 001 | 30,926 | 2 | !4,013 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 008 | 32,850 | 2 | \$,507 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 002 | 59,698 | 4 | 6,354 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 005 | 18,372 | 1 | 4,266 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 004 | 33,171 | . 2 | !5,756 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 999 | 48,657 | 1 3 | 37,781 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 006 | 22,541 | 1 | l 7,50 3 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 007 | 14,157 | 1 | .0,993 | |
| 2024-01-01 | | | 330 | | 305 | | 10 | | 003 | 23 137 | 1 | 7 965 | |

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 Excel 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.

| | | Data Manning - Data Im | nort | | | | |
|---|--|--|---------------|--------|-------------------------|-------------------------|------|
| | Da | ata Import Information | × | | | | |
| | Category | | User Forecast | | | | |
| | Dimension | Source | | | | | |
| | Product Brand | Import File | | y Data | Before Import | | |
| | Product Category | None | | | | | |
| | Product Category Role | None | | - | Monguro | Mooguro | |
| | Product Class | None | | | Measure | Measure | - |
| | Product Class User Controlled PClas Department | None | | | User Forecast Unit 2 | User Forecast Unit 1 | T. |
| | Product Class User Controlled PClas Promotion Code | None | | | Units 2 For Forecasting | Units 1 For Forecasting | |
| | Product Family | None | | 008 | 17,593 | 13,6 | ,661 |
| | Product Group | Import File | | 002 | 23,091 | 17,9 | ,930 |
| | Product Group User Controlled PGrp Marketing Code | Always sourced from a Product Group Attribute | | 005 | 27,764 | 21,5 | ,558 |
| | Product Group User Controlled PGrp Sales Division | Always sourced from a Product Group Attribute | | 004 | 14,340 | 11,1 | ,135 |
| | Product SubClass | None | | 999 | 87,142 | 6/,6 | ,664 |
| | Product Type | None | | 000 | 22,207 | 17,2 | ,209 |
| | Product Type Short Description | None | | 003 | 41 509 | 32 (| 231 |
| | Region | Import File | | 001 | | 24.0 | .013 |
| | RepBroker | Import File | | 008 | | 25,5 | ,507 |
| _ | Rep Broker State | Always sourced from a RepBroker Attribute | | 002 | 59,698 | 46,3 | ,354 |
| | RepBroker Type | Always sourced from a RepBroker Attribute | | 005 | 18,372 | 14,7 | ,266 |
| 2 | Sales Director | Sourced from RepBroker Previous Level definition | | 004 | 33,171 | . 25,7 | ,756 |
| | Sales Director Town | Always sourced from a Sales Director Attribute | | 999 | 48,657 | 37,7 | ,781 |
| | Ship-To Market | None | | 006 | 22,541 | . 17,5 | ,503 |
| 4 | Ship-To Market City | None | - | 007 | 14,157 | 10,9 | ,993 |
| | onp to harket day | None | | 003 | 23,137 | 17,9 | ,965 |
| | | OK | Help | 001 | 30,468 | 23,6 | ,657 |
| | | | | 008 | 10,629 | 8,2 | ,253 |

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

| | 🎓 Monthly Forecasting Data | | | | | | | | | | |
|--------------------------|----------------------------|----------------|-------------|------------------------------|--------------------------------|----------------------------------|--|--|--|--|--|
| Ro Colum View Filt | ws: :: uns: + ter: + | Year: Filtered | ∎11 | ♀ 🔯 ႃ s: All × ∷Regio | 123 🅜 n: Filtered × 🗄 R | 4 Mapped Dimensions | 1 to 100 of 1548 0000 1 to 2 of 2 roup: Filtered × :: Product E > + | | | | |
| - v | | | | | | User Forecast Unit 2 User Foreca | set Unit 1 | | | | |
| 2024 | Months 2024-01-01 | 330 | T RepBroker | Product Group | Product Brand | 17 502 | 13.661 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 002 | 23.091 | 17,930 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 005 | 27,764 | 21 558 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 004 | 14.340 | 11.135 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 999 | 87.142 | 67.664 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 006 | 22.267 | 17.289 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 007 | 20,296 | 15,760 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 003 | 41,509 | 32,231 | | | | |
| 2024 | 2024-01-01 | 330 | 313 | 10 | 001 | 30,926 | 24,013 | | | | |
| 2024 | 2024-01-01 | 330 | 305 | 10 | 008 | 32,850 | 25,507 | | | | |
| 2024 | 2024-01-01 | 330 | 305 | 10 | 002 | 59,698 | 46,354 | | | | |
| 2024 | 2024-01-01 | <u>330</u> | <u>305</u> | <u>10</u> | 005 | 18,372 | 14,266 | | | | |
| 2024 | 2024-01-01 | <u>330</u> | <u>305</u> | <u>10</u> | <u>004</u> | 33,171 | 25,756 | | | | |
| 2024 | 2024-01-01 | <u>330</u> | <u>305</u> | <u>10</u> | <u>999</u> | 48,657 | 37,781 | | | | |
| 2024 | 2024-01-01 | <u>330</u> | <u>305</u> | <u>10</u> | <u>006</u> | 22,541 | 17,503 | | | | |
| 2024 | 2024-01-01 | <u>330</u> | <u>305</u> | <u>10</u> | <u>007</u> | 14,157 | 10,993 | | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | 305 | 10 | 003 | 23,137 | 17,965 | | | | |
| <u>2024</u> | 2024-01-01 | 330 | 305 | 10 | <u>001</u> | 30,468 | 23,657 | | | | |
| 2024 | 2024-01-01 | 330 | 306 | 10 | 008 | 10,629 | 8,253 | | | | |

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.

| | | | | * | Monthly F | orecasting D | ata | | |
|-------------------------|---|----------------|------------|-------------------------------|-------------------------------------|----------------------|----------------------|-----------------------|-------------|
| Ro Colum View Fil | Image: Second | Year: Filtered | 11 | Months: All × Pre Wir D | vious Leve th Mapped imension | iles Dir: All 🗙 | Show All COO | ● 1 to 100 of 204 000 | 1 to 2 of 2 |
| Year | Months | T Region | Sales Dir | SIDir Long Description | T RepBroker | User Forecast Unit 2 | User Forecast Unit 1 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>305</u> | 283,051 | 219,782 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>306</u> | 98,184 | 76,237 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>302</u> | 182,119 | 141,411 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>303</u> | 52,276 | 40,591 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>300</u> | 284,976 | 221,276 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>301</u> | 120,863 | 93,847 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | <u>313</u> | 284,930 | 221,241 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | <u>312</u> | 394,705 | 306,478 | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | <u>309</u> | 74,314 | 57,703 | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>308</u> | 79,903 | 62,043 | | |
| 2024 | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>307</u> | 24,786 | 19,246 | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>306</u> | 56,491 | 43,864 | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>302</u> | 103,498 | 80,364 | | |
| 2024 | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>303</u> | 77,841 | 60,442 | | |
| 2024 | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | <u>304</u> | 140,380 | 109,002 | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | <u>315</u> | 131,996 | 102,492 | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | <u>318</u> | 61,989 | 48,133 | | |
| <u>2024</u> | 2024-02-01 | <u>330</u> | 231 | Helen Briggs | <u>305</u> | 428,792 | 244,507 | | |
| 2024 | 2024-02-01 | 330 | 231 | Helen Briggs | 306 | 82,377 | 55,034 | | • |

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.

| | 😭 Monthly Forecasting Data | | | | | | | | | |
|-------------|---|-----------------|------------|------------------------|------------------|----------------------|--------------------------------|--|--|--|
| | Show All Show All | | | | | | | | | |
| Ro Colum | ws: II <u>)</u> nns: + | Year: Filtered | × B | [™] Of Rep | Broker | Sales Dir: All × | ^Ⅲ Rep Broker State: | <u>All</u> x ∷RepBroker x ∷F > + | | |
| View Fil | ter: + | | | | | | | More Info | | |
| Year | Months | T Region | Sales Dir | SIDir Long Description | Rep Broker State | User Forecast Unit 2 | User Forecast Unit 1 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | FL | 120,863 | 93,847 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>IL</u> | 381,235 | 296,019 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | MO | 52,276 | 40,591 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | NY | 284,976 | 221,276 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>231</u> | Helen Briggs | ΤX | 182,119 | 141,411 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | <u>CA</u> | 284,930 | 221,241 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | PA | 74,314 | 57,703 | | | |
| <u>2024</u> | 2024-01-01 | <u>330</u> | <u>880</u> | Steve Mentas | <u>QC</u> | 394,705 | 306,478 | | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | AZ | 24,786 | 19,246 | | | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>IL</u> | 56,491 | 43,864 | | | |
| 2024 | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | MO | 77,841 | 60,442 | | | |
| 2024 | 2024-01-01 | <u>331</u> | <u>231</u> | Helen Briggs | <u>он</u> | 79,903 | 62,043 | | | |
| 2024 | 2024-01-01 | <u>331</u> | 231 | Helen Briggs | TX | 103,498 | 80,364 | | | |
| 2024 | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | <u>NB</u> | 61,989 | 48,133 | | | |
| 2024 | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | <u>NC</u> | 140,380 | 109,002 | | | |
| 2024 | 2024-01-01 | <u>331</u> | 880 | Steve Mentas | WA | 131,996 | 102,492 | | | |
| 2024 | 2024-02-01 | <u>330</u> | <u>231</u> | Helen Briggs | <u>FL</u> | 95,985 | 56,457 | | | |
| <u>2024</u> | 2024-02-01 | <u>330</u> | 231 | Helen Briggs | L | 511,169 | 299,541 | | | |
| 2024 | 2024-02-01 | 330 | 231 | Helen Briggs | МО | 48,473 | 30,381 | | | |

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.

| | | | | 👚 Mont | thly Foreca | sting Data |
|-------------|-------------------|----------------|----------------|--------------------------|--------------------|---|
| | | | | ? 🔍 🍸 123 | • | 1 to 24 of 24 () () () 1 to 2 of 2 |
| Ro | ws: | Year: Filtered | × II Months: | All 🗙 📔 🗄 Region: Filte | ered 🗙 📔 🗄 Ship- | To Market: All 🗴 📔 Sales Dir 🗴 🗄 Rep Broker State 🗙 🗄 Rej 💙 🕂 |
| Colum | ins: + | | | | | |
| View Fil | ter: 🕇 | | | | | More Info |
| Year | Months | T Region | Ship-To Market | User Forecast Unit 2 Use | er Forecast Unit 1 | A |
| <u>2024</u> | 2024-01-01 | <u>330</u> | 2 | 1,775,416 | 1,378,566 | |
| <u>2024</u> | 2024-01-01 | <u>331</u> | 2 | 676,886 | 525,585 | |
| <u>2024</u> | 2024-02-01 | <u>330</u> | 2 | | | ו ו |
| <u>2024</u> | <u>2024-02-01</u> | <u>331</u> | 2 | Dimens | sion Where | |
| <u>2024</u> | <u>2024-03-01</u> | <u>330</u> | 2 | Data V | Vas Placed | |
| <u>2024</u> | <u>2024-03-01</u> | <u>331</u> | 2 | In Def | ault Value | |
| <u>2024</u> | <u>2024-04-01</u> | <u>330</u> | 2 | | | |
| <u>2024</u> | <u>2024-04-01</u> | <u>331</u> | 2 | 771,679 | 607,798 | |
| <u>2024</u> | <u>2024-05-01</u> | <u>330</u> | 2 | 2,142,265 | 1,643,279 | |
| <u>2024</u> | <u>2024-05-01</u> | <u>331</u> | 2 | 853,827 | 662,869 | |
| <u>2024</u> | <u>2024-06-01</u> | <u>330</u> | 2 | 2,811,820 | 1,818,273 | |
| <u>2024</u> | 2024-06-01 | <u>331</u> | 2 | 973,590 | 626,369 | |
| <u>2024</u> | 2024-07-01 | <u>330</u> | 2 | 2,719,821 | 2,111,873 | |
| <u>2024</u> | 2024-07-01 | <u>331</u> | 2 | 900,880 | 699,511 | |
| <u>2024</u> | 2024-08-01 | <u>330</u> | 2 | 2,728,755 | 2,515,791 | |
| <u>2024</u> | 2024-08-01 | <u>331</u> | 2 | 994,711 | 979,735 | |
| <u>2024</u> | 2024-09-01 | <u>330</u> | 2 | 2,288,097 | 1,829,835 | |
| <u>2024</u> | 2024-09-01 | <u>331</u> | ? | 839,074 | 598,300 | |
| 2024 | 2024-10-01 | 330 | 2 | | 1,100,063 | v |

Using Stratum Cloud Import API For Data Imports

Create, process, and check the status of Azure imports interactively from Stratum.Viewer or by using the Stratum Cloud API's URL calls. The URL calls from the API also can be used to initiate imports that use local SQL Server database tables as their source of data. See the Stratum Cloud Import API section of Viewer help for more detailed information about using the API.

Like Viewer, the API offers flexible approaches and helpful efficiencies for imports. The API can automatically map the selected source data to applicable targets (dimensions and measures) in your data hub. Alternatively, you can tell the API to use a Data Import template from Viewer for mapping.

The Stratum Cloud API also can be used by an app, website, or services — for example with an Azure portal's Azure Data Factory. In that scenario, the API could be called upon to import data from an Azure Data Pipeline. Features specific to your implementation, in this case your Azure Data Factory, would be used either to run the API-driven import right away or to schedule it for processing later according to the event criteria within your app.

Frequently Asked Questions (FAQ's)

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 <u>Target category</u>. 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 | | | |
|---------------------------------------|-------------------------------------|-------------------|------------------------------------|---------------|--|---|--|--------------------------|
| 000 | | | | | | | | |
| Use this preview layout doesn't ma | of your import f atch the import | ile to file la | tell us how to t yout or you wa | reat nt to | data during the ir map to different | nport. Click the Con data than what's pr | figuration button if ovided in the previe | the preview ew lists. |
| Import Option: Add | • | | | V | alidate Configuration | | θ | Preview of rows 1 - 100 |
| Date | ▼ Dimension | Ŧ | Dimension | Ŧ | Ignore 🔻 | Measure 🔻 | Measure V | 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.

| | | Data | Mapping | | | | | | | | |
|--|--|--------------------------------|----------------------|----------------------|----------------------|----------|--|--|--|--|--|
| 000 | | | | | | | | | | | |
| Use this preview of layout doesn't mate | e this preview of your import file to tell us how to treat data during the import. Click the Configuration button if the preview; yout 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 | | | | | | | | | | | |
| Dimension V | Dimension V | Ignore 🔻 | Measure 🔻 | Measure 🔻 | Measure 🔻 | A | | | | | |
| RepBroker 🗸 🔻 | Customer Ship-To | | User Forecast Unit 1 | User Forecast Unit 2 | User Forecast Unit 3 | J | | | | | |
| | | From | Sales Estimates 1 | Sales Estimates 2 | Sales Estimates 3 | - 1 | | | | | |
| | | For Future Forecast | December | December | December | _ | | | | | |
| | | Date | 2020-12-01 | 2020-12-01 | 2020-12-01 | ו | | | | | |
| 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 | Different Measures | 7,857 | 4,750 | 4,672 | | | | | | |
| 312 | 101108 Se | elected For Each Colum | 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.

| A | utoSave 💽 🗄 🏷 י 🖓 י 🖓 י 🖓 🗧 Import Sa | ales For Future Forecasting Time Series 🖻 — 🗆 🗙 |
|------|---------------------------------------|---|
| File | e Home Insert Page Lay(Formulas Data | Review View Add-ins Help PDF ACROBAT Team $>$ Tell me |
| F84 | \cdot : $\times \checkmark f_x$ | ~ |
| | Α | B |
| 68 | Column G | |
| 69 | Туре | Measure |
| 70 | Target | 1/1/2021 |
| 71 | Target | User Forecast Unit 4 |
| 72 | Column H | |
| 73 | Туре | Measure |
| 74 | Target | 2/1/2021 |
| 75 | Target | User Forecast Unit 4 |
| 76 | | |
| 77 | Number of Rows Imported: | 210 |
| 78 | | |
| 79 | Target Dimensions: | Mapped |
| 80 | ABC Classification Code | None |
| 81 | Accounting Group | Sourced from Customer Sold-To Previous Level definition |
| 82 | Account Group Long Description | Always sourced from a Accounting Group Attribute |
| | Data Import Detail (+) | ÷ • |
| | | III II - + 80% |

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 sources 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 source 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.

| A measure | e can onl | y be selected as the | Target of | one column. Please m | w selections. | Click han v | < the Configura what's provide | ation bu d in the | itton if the previ preview lists. | ew | |
|------------|-----------|----------------------|-----------|----------------------|---------------|----------------|-----------------------------------|----------------------|--------------------------------------|--------------------|------------|
| | | | ОК | | | | | | | O Preview of rov | vs 1 - 100 |
| | | | | 1 | | | | Measure | W | Measure | W |
| YYYY-MM-DD | W | Product Type | W | Product Category | W | Product Brand | | User Budget Unit 2 | W | User Budget Unit 2 | |
| Date | | Product Type | | Product Category | | Product Bran | - | Amount | | Units | |
| 2019-01-05 | | | 1 | | 200 | | 2.1 | | \$3,167 | 7 | 431 |
| 2019-01-05 | | | 1 | | 200 | | 002 | | \$3,345 | | 704 |
| 2019-01-05 | | | 1 | | 200 | | 003 | | \$1,165 | 0 | 285 |
| 2019-01-05 | | | 3 | | 200 | | 004 | | \$1,276 | | |
| 2019-01-05 | | | 1 | | 200 | | 999 | | \$3,663 | | 764 |
| 2019-01-05 | | | | | 201 | | 009 | | \$29,912 | | 5,242 |
| 2019-01-05 | | | 1 | | 201 | | 011 | | \$18,140 | | 3,784 |
| 2019-01-05 | | | 1 | | 202 | | 010 | | \$4,729 | | 743 |
| 2019-01-05 | | | 1 | | 203 | | 010 | | \$4,189 | | 731 |
| 2019-01-05 | | | 1 | | 204 | | | | \$2,300 | | 632 |
| 2019-01-05 | | | 1 | | 204 | | 006 | | \$2,462 | 1 | 677 |
| 2019-01-05 | | | 1 | | 204 | | | | \$1,681 | | 248 |
| 2019-01-05 | | | 1 | | 204 | | | | \$3,264 | | 466 |
| 2019-01-05 | | | | | 204 | | 999 | | \$342 | 2 | 148 |
| 2010 01 05 | | | | | | | 000 | | th 070 | | 420 |

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.

Data Mapping

Jse this preview of your import file to tell us how to treat data during the import. Click the Configuration button if the preview ayout 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 V | Dimension V | Dimension V | Measure 🗸 | Measure 🔻 |
| YYYY-MM-DD | Product Type | Product Category | Product Brand | User Budget Unit 2 | User Budget Unit 2 |
| Date | Product Type | Product Category | Product Brand | Amount | Units |
| 2019-01-05 | 1 | . 200 | 001 | \$3,167 | 431 |
| 2019-01-05 | 1 | . 200 | 002 | \$3,345 | 5 704 |
| 2019-01-05 | 1 | . 200 | 003 | \$1,165 | 5 285 |
| 2019-01-05 | 1 | . 200 | 004 | \$1,276 | 335 |
| 2019-01-05 | 1 | 200 | 999 | \$3.663 | 3 764 |

000

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 | | | | | | |
| Date 🗸 | Dimension V | Dimension V | Dimension V | Measure 🔻 | Measure 🔻 | | | | | | |
| YYYY-MM-DD 🛛 | Product Type | Product Category | Product Brand | User Budget Amt 2 | User Budget Unit 2 | | | | | | |
| Date | Product Type | Product Category | Product Brand | Amount 🕞 | Units | | | | | | |
| 2019-01-05 | 1 | . 200 | 00 | \$3,167 | 431 | | | | | | |
| 2019-01-05 | 1 | . 200 | 00 | \$3,345 | 704 | | | | | | |
| 2019-01-05 | 1 | . 200 | 00 | \$1,165 | 285 | | | | | | |
| 2019-01-05 | 1 | . 200 | 004 | \$1,276 | 335 | | | | | | |
| 2019-01-05 | 1 | . 200 | 999 | \$3,663 | 764 | | | | | | |
| 2019-01-05 | 1 | . 201 | 00 | \$29,912 | 5,242 | | | | | | |
| 2019-01-05 | 1 | . 201 | 01 | . \$18,140 | 3,784 | | | | | | |
| 2019-01-05 | 1 | . 202 | 010 | \$4,729 | 743 | | | | | | |
| 2019-01-05 | 1 | . 203 | 010 | \$4,189 | 731 | | | | | | |
| 2019-01-05 | 1 | . 204 | 00! | \$2,300 | 632 | | | | | | |
| 2019-01-05 | 1 | . 204 | 000 | \$2.462 | 677 | | | | | | |

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 <u>but</u> 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 source, 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.

| The Measure Please make r | STRJ and Transaction Date for a new selections. | CTUM.VIEWER | X | Click the Configu han what's provide | ration button if the p ed in the preview list O Preview of | preview ts. |
|------------------------------|---|--------------------------------|----------------------|---|--|----------------|
| | | | | Measure | Weasure | r |
| RepBroker | Customer Ship-To | | User Forecast Unit 1 | User Forecast Unit 1 | Vuser Forecast Unit 3 | 7 |
| | | From | Sales Estimates 1 | Sales Estimates 2 | Sales Estimates 3 | |
| | | For Future Forecast | December | December | December | |
| | | Date | | | 2020-12-01 | |
| RepBroker | Customer Ship-To | ShpTo Long Description | Forecast 1 | Forecast 2 | Forecast 3 | |
| 3: | 12 101113 | Sumpter Dist'n Buffalo NY | 10,84 | 12 9,4 | 422 8,12 | |
| 3: | 12 101107 | Sumpter Dist'n Seattle WA | 7,66 | 5 7, | 168 11,18 | |
| 3: | 12 101112 | Sumpter Dist'n - Dallas TX | 11,73 | 6, | 626 7,04 | 19 |
| 3: | 12 101110 | Sumpter Dist'n Quebec QC | 11,33 | 37 10, | 865 12,88 | 39 |
| 3. | 12 101109 | Sumpter Dist'n Winnipeg MB | 9,19 | 7, | 227 10,55 | |
| 3: | 12 101107BCTH | Sumpter Dist'n Seattle WA THB | 4,47 | 70 3,1 | 947 8,56 | |
| 3: | 12 101113BEWO | Sumpter Dist'n Buffalo NY WOB | 7,85 | 57 4, | 750 4,67 | 72 |
| 3: | 12 101108 | Sumpter Dist'n Calgary AB | 10,63 | 11, | 376 13,01 | 12 |
| 3: | 12 1011073CTH | Sumpter Dist'n Seattle WA THJ | 4,02 | 3 3, | 552 7,70 | 04 |
| 3. | 12 101111 | Sumpter Dist'n St. John NB | 6,65 | 6, | 144 8,48 | 31 |
| 3: | 12 101112BCTH | Sumpter Dist'n - Dallas TX THB | 8,58 | 3, | 143 4,04 | 14 |
| 3: | 12 101108BEWO | Sumpter Dist'n Calgary AB WOB | 11,58 | 32 7, | 886 7,08 | |

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.

| | | | Data | Mapping | | | |
|-------------------------------------|-------------|---|--|---|--|---|-------------|
| 000 | | | | | | | |
| 000 | | | | | | | |
| Use this previe layout doesn't i | w of mat | ^r your import file to ch the import file la | tell us how to treat data yout or you want to map | during the import. to different data th | Click the Configurat an what's provided | tion button if the pr in the preview lists | eview |
| Import Option: Add | ¥ | · | Validate | Configuration | | Preview of ro | ows 1 - 100 |
| Dimension | Ŧ | Dimension V | Ignore 🔻 | Measure V | Measure 🔻 | Measure 🔻 | ^ |
| RepBroker | ▼ | Customer Ship-To | | User Forecast Unit 1 | User Forecast Unit 1 | 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 W | 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 | |
| | 317 | 101113BEWO | Sumpter Dist'n Buffalo NY WOB | 7 857 | 4 750 | 4 677 | |

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

| | | Data | Mapping | | | |
|---|--|---|--|--|--|------------|
| 000 | | | | | | |
| Use this preview o layout doesn't ma | of your import file to tch the import file la | tell us how to treat data ayout or you want to map | during the import. to different data th | Click the Configurat an what's provided | tion button if the pro in the preview lists | eview |
| Import Option: Add | , | Validate | Configuration | | • Preview of ro | ws 1 - 100 |
| Dimension | Dimension V | 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 | |
| 3 | 12 101113 | Sumpter Dist'n Buffalo NY | 10,842 | 9,422 | 8,126 | |
| 3 | 12 101107 | Sumpter Dist'n Seattle WA | 7,665 | 7,168 | 11,185 | |
| 3 | 12 101112 | Sumpter Dist'n - Dallas TX | 11,734 | 6,626 | 7,049 | |
| 3 | 12 101110 | Sumpter Dist'n Quebec QC | 11,337 | 10,865 | 12,889 | |
| 3 | 12 101109 | Sumpter Dist'n Winnipeg MB | 9,198 | 7,227 | 10,553 | |
| 3 | 12 101107BCTH | Sumpter Dist'n Seattle WA THB | 4,470 | 3,947 | 8,560 | |
| 3 | 12 101113BEWO | Sumpter Dist'n Buffalo NY WOB | 7,857 | 4,750 | 4,672 | |
| 3 | 12 101108 | Sumpter Dist'n Calgary AB | 10,639 | 11,376 | 13,012 | |
| 3 | 12 101107JCTH | Sumpter Dist'n Seattle WA THJ | 4,023 | 3,552 | 7,704 | |
| 3 | 12 101111 | Sumpter Dist'n St. John NB | 6,658 | 6,144 | 8,481 | |
| 3 | 12 101112BCTH | Sumpter Dist'n - Dallas TX THB | 8,588 | 3,143 | 4,044 | |
| 3 | 12 101108BEWO | Sumpter Dist'n Calgary AB WOB | 11,582 | 2 7,966 | 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 source 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 source 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.

| AutoSave 💽 🛱 🧐 🕻 | | ĸ |
|-----------------------------|---|-----|
| File Home Insert Page Lay | Dul Formulas Data Review View Add-ins Help PDF ACROBAT Team $>$ Tell me 🖻 🕫 | ב |
| D21 • : 🗙 🗸 | f _x | ٣ |
| A | В | |
| 21 Completed Date: | 11/04/2019 10:12:45 | |
| 22 | | |
| 23 Stage: | Data Validation | |
| 24 Process Status: | Error | |
| 25 | Error :Import Calendar not Defined for the following Transaction Date : 1/31/2030 StackTrace : at Silvon.Viewer.DataImport.Process() | |
| 26 Start Date: | 11/04/2019 10:12:45 | |
| 27 Completed Date: | 11/04/2019 10:12:45 | |
| 28 | | |
| 29 Stage: | Send Email | 1 |
| 30 Process Status: | Completed | |
| Data Import Deta | |] - |
| Ready 🛗 | | % |
| Import Calendar Maintenance | × | |

| Structure Code | Year | Bucket | Ending Date 🔺 | ▲ January 2019 ▶ | New |
|------------------------------|------|--------|---------------|----------------------|-----------------|
| U2 - User Forecast/5/64/00 🗸 | 2016 | 1 | 01/05/2019 | Su Mo Tu We Th Er Sa | |
| | 2017 | 2 | 01/12/2019 | 1 2 2 4 5 | Save |
| | 2018 | 3 | 01/19/2019 | | Delate |
| | 2019 | 4 | 01/26/2019 | 13 14 15 16 17 18 19 | Delete |
| | 2020 | 5 | 01/31/2019 | 20 21 22 23 24 25 26 | Generate |
| | 2021 | 6 | 02/02/2019 | 27 28 29 30 31 | |
| | 2022 | 7 | 02/09/2019 | | Add Bucket |
| | | 8 | 02/16/2019 | | Remove Buckel |
| | | 9 | 02/23/2019 | | |
| | | 10 | 02/28/2019 | | Print |
| | | 11 | 03/02/2019 | | Print Province |
| | | 12 | 03/09/2019 | | FILITIC FIEVIEW |
| | | | ~ | | Close |

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 <u>processing report</u>. 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 <u>Target category</u> for your import.

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| 23 Stage: | | Data Validation | | | | | | | | | _ | _ |
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| 29 Stage: | ata Import D | Send Email etail + | | | | • | | | | | | |
| Ready 🔠 | | | | | | | | | | | + | 70% |

What Happens If I Change A Category From Enhanced/User Controlled To Standard/Corporate Controlled?

Changing a category that your company has already designated as <u>User or Data Steward controlled</u> (ones with Enhanced architecture) to <u>Corporate controlled</u> (ones with Standard architecture) 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 <u>Category maintenance</u> should remain at User or Data Steward controlled. If someone were to change a category to Standard / 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 source exceeds the maximum allowed file size. Files around the 28MB size or higher may result in this message and stop an import's 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 or tables each with less rows and/or columns of data. Divide the data up into smaller sources and import each one separately.

HTTP Error 404.13 - Not Found

The request filtering module is configured to deny a request that exceeds the request content length.

Most likely causes:

• Request filtering is configured on the Web server to deny the request because the content length exceeds the configured value.

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 Excel import file and something looks off with the display of dates or times in the <u>Data Mapping</u> <u>window</u> preview, check the format of the Excel import file. Those types of 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.

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

The category you select as the <u>Target for a Data Import</u> controls which measures are available once you are previewing and mapping data in the <u>Data Mapping window</u>. 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.

| | In | nport Configuration | I. | × | | |
|------------------------|---------------|----------------------|----------------------|---------------|----------------|------------------|
| Source Of Dat | a For Import: | Local File | | | | |
| | Source Type: | Excel | | | | |
| Tar | get Category: | User Forecast | ~ | | | |
| | Format: | Time Series 🗸 | | | | |
| Header | Rows In File: | 3 | | | | |
| | | | | | | |
| Row That Contains Iran | saction Date: | 3 | | | | |
| Transaction | Date Format: | yyyy-mm-dd (2012- | 03-01) 🗸 | | | |
| | OK | Cancel | | Help | | |
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| Lee this proview of a | | t file to tell us by | w to troat data du | ing the im | nort Click the | |
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| different data than v | vhat's prov | vided in the previ | iew lists. | | , | |
| Import Option: Add | | Validate | e Configuration | | C Preview | of rows 1 - 100 |
| Dimension | Ignore | | Measure | Maasura | - | Measure |
| Customer Shin-To | | | - Select a Target - | | • | Liser Forecast I |
| Customer Ship-To | • | • | User Forecast Amt 1 | Sales | ist offic 4 V | Sales |
| | | | User Forecast Amt 2 | December | | January |
| Customer Ship-To | Description | | User Forecast Amt 3 | 2020-12-0 | 1 | 2021-01-01 |
| 101106BEWO | Wilder Foods | St Louis MO WOB | User Forecast Amt 4 | | 88,850 | |
| 101106JEWO | Wilder Foods | St Louis MO WOJ | User Forecast Unit 1 | | 79,965 | |
| 101106IEWO | Wilder Foods | St Louis MO WOI | User Forecast Unit 2 | | 75,522 | |
| 101106 | Wilder Foods | St Louis MO | User Forecast Unit 3 | | 70,586 | |
| 101106HEWO | Wilder Foods | St Louis MO WOH | User Forecast Unit 4 | | 71,080 | |
| 101106GEWO | Wilder Foods | St Louis MO WOG | /0. | 105 | 66,637 | |
| 101106FEWO | Wilder Foods | St Louis MO WOF | 65. | 432 | 62,195 | |

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 source **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 / table 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.

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| 1 | | | | | We | ek # | | | Week 1 | | Week 2 | Week 3 | | |
| 2 | | | | | Da | ate | | | 2019-12-29 | | 2020-01-05 | 2020-01-12 | 2 | |
| 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 | 3 | 604 | |
| 5 | G | 19 | 101138ALAB | Aupurn | Providers | Seattle WA | ABA | | | 259 | 282 | 2 | 370 | |
| 6 | G | 19 | 101138BLAB | Aupurn | Providers | - Seattle WA | ABB | | | 519 | 563 | 3 | 740 | |
| 7 | G | 19 | 101138CLAB | Auburn | Providers | - Seattle WA | ABC | | | 285 | 310 |) | 407 | |
| 8 | G | 19 | 101138DLAB | A T | Providers | Seattle WA | ABD | | | 311 | 338 | 3 | 444 | |
| 9 | G | 19 | 101138ELAB | Aubu | | | | | | 337 | 366 | 5 | 481 | _ |
| 10 | G | 19 | 101138FLAB | Aupurn | | | | | | 363 | 394 | • | 518 | _ |
| 11 | G | 19 | 101138GLAB | Auburn | Dime | nsions In | | | | 389 | 423 | 2 | 555 | _ |
| 12 | G | 19 | 101138HLAB | Auburn | Imp | ort File | | | | 415 | 450 |) | 592 | - 1 |
| 13 | G | 19 | 101138ILAB | Auburn | | | | | | 441 | 479 |) | 629 | _ |
| 14 | G | 19 | 101138JLAB | Auburn | | | | | | 467 | 50 | ' | 666 | _ |
| 15 | G | 19 | 101138KLAB | Auburn | Providers | - Seattle WA | ABK | | | 259 | 283 | 2 | 370 | _ |
| 16 | G | 19 | 101138ADMC | Auburn | Providers | - Seattle WA | MCA | | | 974 | 778 | 3 | 177 | _ |
| 17 | G | 19 | 101138BDMC | Auburn | Providers | Seattle WA | MCB | | | 897 | 1 | 3 | 6 | _ |
| 18 | G | 19 | 101138CDMC | Auburn | Providers | Seattle WA | MCC | | | 1,794 | 1 | | 11 | _ |
| 19 | G | 19 | 101138DDMC | Aupurn | Providers | Seattle WA | MCD | | | 987 | 9 |) | 6 | |
| 20 | G | 19 | 101138EDMC | Aupurn | Providers | - Seattle WA | MCE | | | 1,076 | 10 |) | / | - |
| 21 | G | 19 | 101138FDMC | Auburn | Providers | - Seattle WA | MCF | | | 1,166 | 1 | | / | - |
| 22 | G | 19 | 101138GDMC | Aupurn | Providers | - Seattle VVA | MCG | | | 1,256 | 11 | 2 | 8 | - |
| 23 | G | 19 | 101138HDMC | Aupurn | Providers | - Seattle VVA | MCH | | | 1,346 | 12 | 2 | 8 | - |
| 24 | G | 19 | 101138IDMC | Aupum | Providers | - Seattle VVA | MCI | | | 1,435 | 1. | 5 | 9 | |
| | UC | D DCWDivWeeklySa | lesSource (+) | | | | nat I I | | | 1525 | | | u | Þ |
| 1 | | | | | | | | | | | | | + 8 | 80% |

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

Data Mapping

000

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.

| Dimension | ▼ | Dimension V | Dimension | ▼ | Igno | e 🔻 | Measure 🔻 | Measure | |
|-----------|---|---------------------------------|------------------|---|------|----------------------------|------------------------|--------------------|---|
| Division | • | Distribution Center Warehouse 🔻 | Customer Ship-To | • | | • | User Budget Unit 1 🛛 🔻 | User Budget Unit 1 | , |
| | | | | | Mee | : # | Week 1 | Week 2 | |
| | | | | | D. | | 2019-12-29 | 2020-01-05 | |
| Division | | Distribution Center Warehouse | Customer Ship-To | | Shpl | | ales Units | Sales Units | |
| G | | 19 | 101138 | | Aubu | n | 265 | | 4 |
| G | | 19 | 101138ALAB | | Aubu | n I Mapped | 259 | | 2 |
| G | | 19 | 101138BLAB | | Aubu | Dimensions | 519 | | 5 |
| G | | 19 | 101138CLAB | | Aubu | n f | 285 | | 3 |
| G | | 19 | 101138DLAB | | Aubu | n F | 311 | | 3 |
| G | | 19 | 101138ELAB | | Aubu | n Providers Seattle WA ABE | 337 | | 3 |
| G | | 19 | 101138FLAB | | Aubu | n Providers Seattle WA ABF | 363 | | 3 |
| G | | 19 | 101138GLAB | | Aubu | n Providers Seattle WA ABG | 389 | | 4 |
| G | | 19 | 101138HLAB | | Aubu | n Providers Seattle WA ABH | 415 | | 4 |
| G | | 19 | 101138ILAB | | Aubu | n Providers Seattle WA ABI | 441 | | 4 |
| G | | 19 | 101138JLAB | | Aubu | n Providers Seattle WA ABJ | 467 | | 5 |
| G | | 19 | 101138KLAB | | Aubu | n Providers Seattle WA ABK | 259 | | 2 |
| G | | 19 | 101138ADMC | | Aubu | n Providers Seattle WA MCA | 974 | | 7 |

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.

| 218 | 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 🥌 |
| | Distribution Center | Always sourced from Mistribution Center Warehouse Attribute |
| 238 | Warehouse State | Aways sourced none Distribution benter 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.

| 1 | Product | None |
|---|--------------------|------|
| 5 | Product ABC Class | None |
| 5 | Product Commodity | None |
| 7 | Product Primary | None |
| 3 | Product Primary | None |
| 9 | Product Purchasing | None |
| D | Product Brand | None |
| 1 | Product Category | None |
| 2 | Product Category | None |
| 3 | Product Class | None |
| 1 | Product Family | None |
| 5 | Product Group | None |
| 5 | 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.

| Image: Second | ★ Auburn Providers Imported Data | | | | | | | | | | |
|---|---|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Rows: Product Brand: All × > II Division × II Distribution Center Warehouse × II: Customer Ship-To × II: Customer Class × II: Columns: IYear: 2020 + View Filter: + Year 2020 III IIII IIIII IIIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | 🕂 🖸 🕅 🚔 🍙 📊 🔍 💡 🔯 🝸 🛂 🕜 🛛 🛇 ୦୦୦୦୦ 1 to 2 of 2 🗘 ୦୦୦୦୦ 1 to 9 of 9 | | | | | | | | | | |
| Columns:If Year: 2020 × > If Months: All × > If Weeks × +View Filter:+View Filter:+Year2020Image: Columns (Columns)MonthsJanuaryFebruaryMarchAprilMayJuneJulyAugustSeptemberProduct BrandPBrnd Long DescriptionUser BudgetUser BudgetUnit 1Unit 1Unit 1Unit 1Unit 1Unit 1User BudgetUser BudgetUser BudgetUser BudgetUser BudgetUser BudgetUser BudgetUnit 1Unit 1Unit 1Unit 1Unit 1User BudgetUser BudgetUser BudgetUser BudgetUser BudgetUser BudgetUnit 1Unit 1 <td>Rows:</td> <td colspan="8">Rows: 🛛 Product Brand: All 🗙 🕻 🗇 Division 🗶 🗄 Distribution Center Warehouse 🗶 🗒 Customer Ship-To 🗶 🗒 Customer Class 🗶 📴 🕨 🕇</td> | Rows: | Rows: 🛛 Product Brand: All 🗙 🕻 🗇 Division 🗶 🗄 Distribution Center Warehouse 🗶 🗒 Customer Ship-To 🗶 🗒 Customer Class 🗶 📴 🕨 🕇 | | | | | | | | | |
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| MonthsJanuaryFebruaryMarchAprilMayJuneJulyAugustSeptemberProduct BrandPBrnd Long DescriptionUser Budget Unit 1User Budget Unit 1< | | Veer | 2020 | | | | | | | | |
| MonthsJanuaryFebruaryMarchAprilMayJuneJulyAugustSeptemberProduct BradPBrnd Long DescriptionVser Budget Unit 1Vser Budget Unit 1 </td <td></td> <td>Tear</td> <td>2020</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> | | Tear | 2020 | | | | | | | | |
| Product Brand PBrnd Long Description User Budget Unit 1 Unit 1 | | <u>Months</u> | <u>January</u> | February | <u>March</u> | April | <u>May</u> | <u>June</u> | <u>July</u> | August | September |
| 2 ? 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 | Product Brand | PBrnd Long Description | User Budget Unit 1 |
| Grand Total Grand Total 117,351 155,608 88,247 91,678 178,224 141,617 108,401 175,109 39,448 | 2 | ? | 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 🗟 🎝 🖓 3 to 50 of 91 🕼 🖓 00000 1 to 5 of 9 | | | | | | | | | |
| I | Rows: II Division: All × > II Distribution Center Warehouse: All × > II Customer Ship-To: Filtered × > II Customer Class × II Cus | | | | | | | | | |
| Colu | umns: | | Months: All × > 🗄 We | eks × + | | | | | | |
| View | Filter: | + | | | | | | | | |
| | | | | | | | | | | |
| | | | | Year | <u>2020</u> | | | | | |
| | | | | Months | <u>January</u> | <u>February</u> | <u>March</u> | <u>April</u> | <u>May</u> | |
| Divisi | on <u>Dist</u> | ibution Center Warehouse | T Customer Ship-To | ShpTo Long Description | User Budget Unit 1 | |
| <u>G</u> | <u>19</u> | | <u>101138</u> | Auburn Providers Seattle WA | 2,291 | 3,762 | 3,803 | 4,054 | 5,826 | |
| G | <u>19</u> | | 101138ALAB | Auburn Providers Seattle WA ABA | 1,645 | 1,018 | 803 | 770 | 2,365 | |
| G | <u>19</u> | | 101138BLAB | Auburn Providers Seattle WA ABB | 3,290 | 2,037 | 1,606 | 1,540 | 4,731 | |
| G | <u>19</u> | | 101138CLAB | Auburn Providers Seattle WA ABC | 1,809 | 1,120 | 883 | 847 | 2,602 | |
| G | <u>19</u> | | 101138DLAB | Auburn Providers Seattle WA ABD | 1,974 | 1,222 | 964 | 924 | 2,838 | |
| <u>G</u> | <u>19</u> | | 101138ELAB | Auburn Providers Seattle WA ABE | 2,138 | 1,324 | 1,044 | 1,001 | 3,075 | |
| G | <u>19</u> | | 101138FLAB | Auburn Providers Seattle WA ABF | 2,303 | 1,426 | 1,124 | 1,078 | 3,311 | |
| G | <u>19</u> | | 101138GLAB | Auburn Providers Seattle WA ABG | 2,467 | 1,528 | 1,205 | 1,155 | 3,548 | |
| G | <u>19</u> | | 101138HLAB | Auburn Providers Seattle WA ABH | 2,632 | 1,630 | 1,285 | 1,232 | 3,785 | |
| <u>G</u> | <u>19</u> | | 101138ILAB | Auburn Providers Seattle WA ABI | 2,796 | 1,731 | 1,365 | 1,309 | 4,021 | |
| G | <u>19</u> | | 101138JLAB | Auburn Providers Seattle WA ABJ | 2,961 | 1,833 | 1,446 | 1,386 | 4,258 | |
| Q | <u>19</u> | | 101138KLAB | Auburn Providers Seattle WA ABK | 1,645 | 1,018 | 803 | 770 | 2,365 | |
| | 10 | | 1011100000 | Auburn Dravidana Caabla MA MCA | 4.050 | 2 40 6 | 200 | 2 0 2 7 | 2.262 | |

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 nondefault 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 <u>import's processing report</u> to show them how dimensions were treated during mapping and processing.

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| 1 Da | ite | (| Product | Pro | d Long | g Descrip | tion | Amount | | | Units | | | | | |
| 2 20 | 17-01-31 | | 620A914001 | Pea | r Hlvs I | _S 12 oz E | 3R* 0A | | 738 | 8.90169 | | | 16.56 | | | |
| 3 20 | 17-01-31 | | 620A914002 | Pea | ch Hlvs | 5 HS 12 oz | 2 BR* 0A | | 1855 | 6.10919 | | | 41.4 | | | |
| 4 20 | 17-01-31 | | 620A914003 | App | lesauc | e 12oz BR | * 0A | | 6848 | 8.83804 | | 1 | 5 7.32 | | | |
| 5 20 | 17-01-31 | | 620A914008 | Pea | r Slos I | LS 12 oz I | 3R* 0A | | 743 | .76757 | | | 16.56 | | | |
| 6 20 | 17-01-31 | | 620A914016 | Pea | ch Slcs | s LS 16 oz | 2 BR* 0A | | 3205 | .34814 | | : | 5 7.9 6 | | | |
| 7 20 | 17-01-31 | | 620A914025 | Mar | nd Org | Pcs 12oz | BR* 0A | | 3994 | .38249 | | | 80.04 | | | |
| 8 20 | 17-01-31 | | 620A914315 | Tro | pical Mi | ix LS 12oz | BR* 0A | | 8544 | .18458 | | 1 | 76.64 | | | |
| 9 20 | 17-01-31 | | 620A914322 | Pea | ch 6oz | LnchPk E | 3R* 0A | | 41689 | .68487 | | 474.7 | 2002 | | | |
| 10 20 | 17-01-31 | | 620A914401 | Pna | ppl Slc | s 12 oz Bl | R* 0A | | 2610 | .16794 | | : | 57.96 | | | |
| 11 20 | 17-01-31 | | 620A914402 | P | Pitt | ted 12 oz | BR* 0A | | 668 | .20428 | | | 13.8 | | | |
| 12 20 | 17-01-31 | | 620A914403 | Pna | IPH | | | | 2136 | .14344 | | | 46.92 | | | |
| 13 20 | 17-01-31 | | 620A914404 | Frt0 | Ckta | Dimons | ion In | | 35592 | .77023 | | 808.6 | 8004 | | | |
| 14 20 | 17-01-31 | | 620A914603 | Bla | ckb | Import | Ello | | 10817 | .16885 | | : | 220.8 | | | |
| 15 20 | 17-01-31 | | 620A924015 | Pea | ch | import | . File | | 1610 | 2.4475 | | 433.3 | 2002 | | | |
| 16 20 | 17-01-31 | | 620A924401 | Pna | ppl | | | | 3996 | .92169 | | 1 | 04.88 | | | |
| 17 20 | 17-01-31 | | 620A924403 | Pna | ppl Bite | es 12oz Pl | L* 0A | | 6284 | .27173 | | 1 | 62.84 | | | |
| 18 20 | 17-01-31 | | 620A924404 | Frt0 | Cktail LS | S 12oz PL | * 0A | | 9317 | .92302 | | 248.4 | 0001 | | | |
| 19 20 | 17-01-31 | | 620A924622 | App | le Fillin | g 12oz PL | * 0A | | 1442 | .40363 | | | 41.4 | | | |
| 20 20 | 17-01-31 | | 620A924624 | Blue | eberry | Filling 12o | z BR* 0A | | 19472 | .55937 | | 474.7 | 2002 | | | |
| 21 20 | 17-01-31 | | 620A954000 | Rec | I Ripe T | omatoes (| DA | | 60527 | .22896 | | 1606.3 | 2003 | | | |
| 22 20 | 17-01-31 | | 620A954003 | App | lesauc | e 106oz B | R* 0A | | 11832 | .01535 | | 1 | 57.32 | | | |
| 23 20 | 17-01-31 | | 620A954005 | Por | k Cutlet | ts 0A | | | 84616 | .27757 | | 1255.8 | 80003 | | | |
| 24 20 | 17-01-31 | | 620A954007 | Gro | und Ro | und 90% | Lean 0A | | 5000 | 2.9541 | | 1015.6 | 8005 | | | |
| 05 00 | 47.04.04 | raductiv | 0004054000 | D | ^ | ^ | | | 20020 | OALO4 | | 4400 0 | 0005 | | | |
| | P | Toutet w | ith transaction | Da (+) | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | | | | + | 80% |

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

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

Data Mapping 000 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 ¥ Measure Measure Date Ŧ Ignore Ŧ Ŧ Ŧ UCD 4 Basic Day UCD U... Ŧ UCD 4 Basic Day UCD A... YYYY-MM-DD Product Ŧ Ŧ T T Product d Long Description Date Amount Units 620A914001 738.90169 16.56 2017-01-31 2017-01-31 620A914002 1855.10919 41.4 Pead Mapped 2017-01-31 620A914003 6848.83804 Apple 157.32 Dimension 2017-01-31 620A914008 Pear 743.76757 16.56 2017-01-31 620A914016 Peach 3205.34814 57.96 620A914025 3994.38249 2017-01-31 Mand Ord PCS 1202 BK" 80.04 2017-01-31 620A914315 Fropical Mix LS 12oz BR* 0A 8544.18458 176.64 2017-01-31 620A914322 each 6oz LnchPk BR* 0A 41689.68487 474.72002 2017-01-31 620A914401 nappl Slcs 12 oz BR* 0A 2610.16794 57.96 2017-01-31 620A914402 Prunes Pitted 12 oz BR* 0A 668.20428 13.8 2017-01-31 620A914403 Pnappl Bites 12oz BR* 0A 2136.14344 46.92 2017-01-31 620A914404 FrtCktail LS 12 oz BR* 0A 35592.77023 808.68004 2017-01-31 620A914603 Blackberries 12oz BR* 0A 10817.16885 220.8

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 |
| 4 | 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.

| | ★ Imported Product Data | | | | | | | |
|--------------|---|---------------|---|---|---------------------------|----------------|-------------|--------|
| | 🔚 😥 🕅 🚔 🍙 📊 🖳 💡 🔯 🍸 🛂 🕜 Show All 😂 ƏƏƏ 5414 to 5463 of 5513 🛛 OOO 🛛 1 to 2 of 2 | | | | | | | |
| Rows: | Product Brand: All | EF | Product: All × 🔰 🗄 Product Fam | ily × II Product Group | × II Product Class × | Product Catego | + | |
| Columns: | ∏ <u>Year: All</u> × > ⊞M | onths × | + | | | - | | |
| View Filter: | + | | | | | | | |
| | | | Vear | 2017 | 2017 | | | |
| Product Bran | d PBrnd Long Description | Product | Prod Long Description UCD | 4 Basic Day UCD Amt 1 UC | D 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 | <u>954011</u> | Baby Carrots | \$5,017,193.46 | 125,848 | | | |
| <u>004</u> | Idaho Delight | <u>954013</u> | Potatoes - Idaho Russett | \$4,954,092.79 | 125,947 | | | |
| 005 | Farm Crisp | <u>954009</u> | Apples Red Delicious | \$7,121,932.70 | 183,612 | | | |
| 006 | Southern Sweet | <u>954020</u> | Navel Oranges | \$7,222,891.73 | 184,448 | | | |
| 006 | Southern Sweet | <u>954024</u> | Orange Juice Conc. | \$12,114,796.07 | 179,709 | | | |
| 007 | SugarDrop | <u>954016</u> | Strawberries | \$9,084,950.15 | 126,383 | | | |
| 008 | Bing-a-ling | <u>954017</u> | Cherries, Bing | \$10,664,049.99 | 147,580 | | | |
| 009 | Farm Fresh | <u>914001</u> | Pear Hivs LS 12 oz BR* | \$1,705,313.07 | 38,687 | | | |
| <u>009</u> | Farm Fresh | <u>914002</u> | Peach Hlvs HS 12 oz BR* | \$1,354,398.65 | 30,575 | | | |
| <u>009</u> | Farm Fresh | <u>914003</u> | Applesauce 12oz BR* | \$2,948,097.56 | 68,420 | | | |
| <u>009</u> | Farm Fresh | <u>914004</u> | FrtCktail HS 12 oz BR* | \$3,425,113.02 | 77,713 | | | |
| 009 | Farm Fresh | <u>914008</u> | Pear Slcs LS 12 oz BR* | \$5,753,146.24 | 129,905 | | | \sim |
| | | 04.4045 | | \$2 182 025 15 | 70 099 | | | |
| - | | | | | | | - | |
| Rows: | Image: Second state | I I | Timported Y III + Product: All × > II Product Fam + | Show All (ily × II Product Group | Product Class × | 13 0000 | 1 to 2 of 2 | ^ |
| View Filter: | + | | | | | | | |
| | | | | | | | | |
| | | | Year | <u>2017</u> | <u>2017</u> | | | |
| Product Bran | d PBrnd Long Description | <u>Produ</u> | ct Prod Long Description | UCD 4 Basic Day UCD Amt | t 1 UCD 4 Basic Day UCD U | nit 1 | | |
| 2 | ? | 620A914 | 001 Pear Hlvs LS 12 oz BR* 0A | \$18,238. | 59 | 411 | | |
| 2 | ? " | 620A914 | 002 Peach Hlvs HS 12 oz BR* 0A | \$12,008. | 62 | 270 | | |
| 2 | ? | 620A914 | 003 Applesauce 12oz BR* 0A | \$64,876. | 83 1 | ,501 | | |
| 2 | ? | 620A914 | 004 FrtCktail HS 12 oz BR* 0A | \$39,018. | 18 | 886 | | |
| 2 | ? | 620A914 | 008 Pear Slcs LS 12 oz BR* 0A | \$48,451. | 23 1 | ,090 | | |
| 2 | ? | 620A914 | 015 Peach Hlvs LS 12 oz BR* 0A | \$24,130. | 63 | 546 | | |
| 2 | ? | 620A914 | 016 Peach Slcs LS 16 oz BR* 0A | \$38,223. | 01 | 698 | | |
| 2 | ? | 620A914 | 022 Pear 6oz LnchPk LS 0A | \$36,842. | 28 | 417 | | |
| 2 | ? | 620A914 | 025 Mand Org Pcs 12oz BR* 0A | \$35,003. | 23 | 701 | | |
| 2 | ? | 620A914 | 301 Escalloped Apples 12 oz BR* 0A | \$37,891. | 87 | 613 | | |
| 2 | ? | 620A914 | 302 Peach Slcs HS 12 oz BR* 0A | \$51,221. | 87 1 | 1,167 | | |
| 2 | ? | 620A914 | 303 Sw Cherries Pittd 12oz BR* 0A | \$77,717. | 23 1 | 1,593 | | |
| 2 | ? | 620A914 | 304 Peach Slcs LS 12oz BR* 0A | \$112,150. | 06 2 | 2,545 | | |
| 2 | ? | 620A914 | 315 Tropical Mix LS 12oz BR* 0A | \$26,151. | 31 | 544 | | \sim |
| < | | 101014 | | - • • • • • • • • • • • • • • • • • • • | an | 71 V | > | |

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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 <u>Data Import list window</u>.
- 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 <u>Why Did Import Data Get</u> <u>Added To A Dimension's Default Value '?' Member?</u>.
- To further investigate what got imported, review details in the import processing report and compare them to your import file or table. The report tells you which tells got imported and how many rows were imported. See <u>Review Processing Details For A Data Import</u>.
 - It's possible the import source had a null row Data Import will stop looking for data to import once it finds a null row. Look at your import source 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 or table 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 source 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 <u>Data Mapping window's</u> preview of your import file / table. If your import source has more than 100 rows, only the first 100 are displayed for mapping purposes.

If your import source 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 source. Verify that the import source does not contain a null row, for example. 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 from the Excel spreadsheet used for the import. 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.

| 1 | A | В | С | 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 | 101103BEVVO | Wilder Foods Buttalo NY WOB | 56,185 | 56,133 | 64,276 |
| 13 | 300 | Nicole Toscai. | 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 | ninate Null | Wilder Foods Buffalo NY WOJ | 50,566 | 50,519 | 57,848 |
| 16 | 300 | Nicole Toscano | From Import | Wilder Foods Buffalo NY WOI | 47,757 | 47,713 | 54,635 |
| 17 | 300 | Nicole Toscano | File | Wilder Foods St Louis MO WOA | 46,737 | 44,425 | 51,928 |
| 18 | 300 | Nicole Toscano | File | 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 | 10111/JEWO | 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 |
| | ${} \rightarrow \ \ $ | User Forecast with A | S Compa View I | Detail 📋 🕀 | • | | |
| •3 | | | | | | ▦ ▣ 삗 - | + 60% |

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 <u>Data Mapping window</u> but forgot to do so before
 processing the import.
- There were hidden rows in your import source, which was an Excel spreadsheet. 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 <u>Review Processing Details For A Data Import</u>.

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

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

That can happen if your import file was an Excel spreadsheet that 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 <u>Data Mapping window</u>.

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 <u>Data Import list window</u> or open its Processing Report to review processing stage details. See the topic <u>Review Processing Details For A Data Import</u>.
- 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.

If you are an administrator who was expecting email notifications every time someone processes an import, settings in System Configuration must be set up first to support those emails. See the topic <u>Send Automatic Email</u> <u>Notifications About The Processing of Data Imports</u>.

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

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 <u>Data Mapping</u> window by clicking Configuration. Other configuration and mapping changes can be made directly from the mapping window.

See also Automatic Data Mapping And Import Configuration.

| Data Mapping - Data Import | | | | | | | | | |
|--|--|--------------|-------------------|--------|-------------------------|----------|-------------------|--|--|
| 0000 | | | | | | | | | |
| Jse the Configuration options and Mapping preview to tell us how to treat data for the import. | | | | | | | | | |
| Description: Optionally enter a description for this import Configuration Delete Category Data Before Import | | | | | | | | | |
| Click Process to import your da | Click Process to import your data or click Add Template first to save mapping for future use. Add Template | | | | | | | | |
| | Import Configuration | _ | × ore | • | Measure | T | Measure | | |
| | | | | • | User POS Amt 4 | ▼ | User POS Unit 4 | | |
| Source Of Data For | Import: Local File | | rr Long Descri | iption | Daily Sales Daily Sales | a Amount | Daily Sales Daily | | |
| Sour | ce Type: Excel | | / England | | | \$10,782 | | | |
| | | | at Lakes | | | \$1,535 | | | |
| larget C | ategory: User POS | V | Coast | | \$4,956 | | | | |
| | Format: Transactions 🗸 | | antic | | \$5,347 | | | | |
| Header Row | s In File: 1 | | th Central | | \$8,326 | | | | |
| | | | at Plains | | | \$5,382 | | | |
| Row That Contains Transaction | on Date: | | thwest | | | \$3,715 | | | |
| Transaction Date | Format: | \checkmark | :hwest | | | \$3,508 | | | |
| | | | ern Atlantic Prov | vinces | | \$8,742 | | | |
| | OK Cancel | Help | tern Provinces | | | \$4,010 | | | |
| L | | | tral Provinces | | | \$5,198 | | | |
| 2019-01-06 | 50 | 11 | 04 New England | | | \$10,782 | | | |
| 2019-01-06 | 50 | 11 | 05 Great Lakes | | | \$1,535 | | | |
| 2019-01-06 | 51 | 11 | 02 Gulf Coast | | | \$4 956 | | | |

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 <u>Data Mapping</u> preview. If you are using a template for your data import, you cannot change mappings unless you detach the template (click the "x" button to the right of the template name in the mapping window).

See also Automatic Data Mapping And Import Configuration.

| | | | Data Map | ping | | | | | |
|------|---|------------------------------|----------------------|----------------------|-------------------------|-------------------------|--|--|--|
| S | 00 | | | | | | | | |
| Use | Ise this preview of your import file to tell us how to treat data during the imposed on the preview layout doesn't match the import file layout or you want to map to diffe Properties To Adjust by ided in the preview | | | | | | | | |
| list | ists. Mapping Selections | | | | | | | | |
| Imp | ort Option: Add | | Validate Config | guration | | Preview of rows 1 - 100 | | | |
| • | Dimension V | Ignore 🔻 | Measure 🔻 | Measur V | Measure 🔻 | Measure 🔻 | | | |
| T | Customer Ship-To | T | User Forecast Unit 4 | User Forecast Unit 4 | - Select a Target - 🛛 🔻 | Jser Forecast Unit 4 | | | |
| | | | Sales | Sales | User Forecast Amt 1 | Sales | | | |
| | | | November | December | User Forecast Amt 2 | February | | | |
| | Customer Ship-To | Description | 2020-11-01 | 2020-12-01 | User Forecast Amt 3 | 2021-02-01 | | | |
| | 101106BEWO | Wilder Foods St Louis MO WOB | 93,474 | 88,850 | User Forecast Amt 4 | 108,389 | | | |
| | 101106JEWO | Wilder Foods St Louis MO WOJ | 84,127 | 79,965 | User Forecast Unit 1 | 97,550 | | | |
| | 101106IEWO | Wilder Foods St Louis MO WOI | 79,453 | 75,522 | User Forecast Unit 2 | 92,130 | | | |
| | 101106 | Wilder Foods St Louis MO | 77,501 | 70,586 | User Forecast Unit 3 | 89,402 | | | |
| | 101106HEWO | Wilder Foods St Louis MO WOH | 74,780 | 71,080 | User Forecast Unit 4 N | 86,711 | | | |
| | 101106GEWO | Wilder Foods St Louis MO WOG | 70,106 | 66,637 | 19.89 | 81,292 | | | |
| | 101106FEWO | Wilder Foods St Louis MO WOF | 65,432 | 62,195 | 72,700 | 75,872 | | | |
| | 101106EEWO | Wilder Foods St Louis MO WOE | 60,758 | 57,752 | 67,507 | 70,453 | | | |
| | 101103BEWO | Wilder Foods Buffalo NY WOB | 56,185 | 56,133 | 64,276 | 63,827 | | | |
| | 10110005000 | Wilder Foods Ct Louis MO WOD | FC 005 | E2 210 | (2.214 | CE 022 | | | |

Definitions

Data Steward

Security Administrators can be granted Data Steward rights, which expands their capabilities within Stratum Data Import and data management functionality.

- Data Stewards have full access to Data Import features they can import data* from all cloud and local sources of data that have been defined for their environment.
- Also, Data Stewards can use either the Stratum Cloud API or the Data Import windows in Stratum Viewer to initiate their data imports. Both tools are available to them. Stratum users who aren't Data Stewards can import data only from local sources and only from the Data Import windows in Viewer.

*Note: Data can only be imported into measures from categories that have been assigned the "Enhanced" Stratum data model architecture, which is handled via Category maintenance.

Enhanced Category: Data Steward Or User Controlled

Categories with an 'Enhanced' data architecture designation can be used with Data Import. These categories contain data that is controlled by the user community, either general users or Data Steward administrators. The type of user who can import into the category is determined by User vs. Data Steward designations controlled from the Category window. For these categories, data can be imported from corporate business systems as well as external data sources such as demographics, housing trends, or other unique data that will complement your Stratum data.

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.

| III + View Name: ↓→ View Filter | Daily Sales by Custom | er Type | |
|------------------------------------|----------------------------|--|---|
| <u>Customer Type</u> | 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 | × | | | | | | |
|---|--|----------|--|--|--|--|--|--|
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| Budget | Budget Budget ASP Working | | | | | | | |
| Budget | Budget Budget Units Frozen | | | | | | | |
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| 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 Calc Values Budget Units Frozen Calc | | | | | | | |
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| Daily Sales Daily Sales Amount | | | | | | | | |
| 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 | T | | | | | | | |
| From Year: Current Year | To Year: Current Year | • | | | | | | |
| Period: Week 37 | Period: Week 38 | • | | | | | | |
| Offset: 0 | Offset: 0 | | | | | | | |
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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.

| IIII + View Name: ↓ → View Filter | III + View Name: <i>Daily Sales by Customer Type</i> ↓ → 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 | | | | | | |

Standard Corporate Controlled Category

Corporate controlled categories are ones with a 'Standard' data architecture designation and that 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.

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.