Working with Data Import Stratum.Viewer 7

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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.

A	AutoSave 💽 🗗 🥠 - 🖓 - 🗧 UCD Daily ShipTo Region Territory Transactions For 2019.xlsx - Saved 🛛 🗖 – 🗆 🗙									
Fil	e Home In	sert Page Layout F	ormulas Data Revie	w View Add-ins Help	PDF ACROBAT Team	n 🔎 Tell me 🖻 🖵				
A8	A8 \checkmark i \land f_x 2018-12-30 \checkmark									
	Days	Ship-To Region	Ship-To Territory	STerr Long Description	Daily Sales Daily Sales					
1					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		51	1102	Gulf Coast	\$4,956	877				
5	2018-12-30	51	1103	Midlantic	\$5,347	988				
6	2018-12-30	52	1101	South Central	\$8,326	1,538				
7	2018-12-30	52	1106	Great Plains	\$5,382	992				
8	2018-12-30	53	1100	Southwest	\$3,715	600				
9	2018-12-30	53	1107	Northwest	\$3,508	604				
10	2018-12-30	54	1111	Eastern Atlantic Provinces	\$8,742	1,594				
11	2018-12-30	55	1108	Western Provinces	\$4,010	755				
12	2018-12-30	55	1109	Central Provinces	\$5,198	882				
13	2019-01-06	50	1104	New England	\$10,782	1,984				
14	2019-01-06	50	1105	Great Lakes	\$1,535	257				
15	2019-01-06	51	1102	Gulf Coast	\$4,956	877				
16	2019-01-06	51	1103	Midlantic	\$5,347	988				
17	2019-01-06	52	1101	South Central	\$8,326	1,538				
18	2019-01-06	52	1106	Great Plains	\$5,382	992				
19	2019-01-06	53	1100	Southwest	\$3,715	600				
20	2019-01-06	53	1107	Northwest	\$3,508	604				
21	2019-01-06	54	1111	Eastern Atlantic Provinces	\$8,742	1,594				
22		55	1108	Western Provinces	\$4 010	755 🔻				
	Data T	o Import 🕂		1		•				
]+ 90%				

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

	Import Configuration								
Source Of Data Fo	Import: Local File								
Sou	ce Type: Excel								
Target C	ategory: User POS	~							
	Format: Transactions 🗸								
Header Row	s In File: 1								
Row That Contains Transacti	on Date:								
Transaction Date	Format:		\sim						
	OK 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 M	appin	g - Data Import		
Use the Configuratio	n options and Mapping preview t	o tell us how to treat dat	ta for the	import.		
Description: Data from	m 2018 and 2019 for Point of Sales 4	Amt and Units		Confi	guration 🛛 Delete Category Data B	efore Import
Click Process to impor	t your data or click Add Template fin	st to save mapping for futu	re use. A	dd Template		
Date	▼ Dimension	▼ Dimension	T	Ignore	▼ Measure ▼	Measure
yyyy-mm-dd	Ship-To Region	 Ship-To Territory 	T		▼ User POS Amt 4 ▼	User POS Unit 4
Days	Ship-To Region	Ship-To Territory		STerr Long Description	Daily Sales Daily Sales Amount	t Daily Sales Daily Sales Units
2018-12-30		50	1104	New England	\$10,782	2 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	7 988
2018-12-30		52	1101	South Central	\$8,326	1,538
2018-12-30		52	1106	Great Plains	\$5,382	2 992
2018-12-30		53	1100	Southwest	\$3,715	5 600
2018-12-30		53	1107	Northwest	\$3,508	604
2018-12-30		54	1111	Eastern Atlantic Provinces	\$8,742	2 1,594
2018-12-30		55	1108	Western Provinces	\$4,010	755
2018-12-30		55	1109	Central Provinces	\$5,198	882
2019-01-06		50	1104	New England	\$10,782	2 1,984
2019-01-06		50	1105	Great Lakes	\$1,535	5 257
2019-01-06		51	1102	Gulf Coast	\$4,956	5 877
2019-01-06		51	1103	Midlantic	\$5,347	7 988
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	5 600
2019-01-06		53	1107	Northwest	\$3,508	3 604
2019-01-06		54	1111	Eastern Atlantic Provinces	\$8,742	2 1,594
2019-01-06		55	1108	Western Provinces	\$4.010	255
2019-01-06		55	1109	Central Provinces	¢5 198	2882

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.

<u>}</u>	Search St	ratum Views 🔍 🤇	2		KS 📃
	Dat	ta Import			
Cated Choose The Source Of Data For This Import	× Submitted By		Completed		File/Table
User	Karen Shype	08/05/2022 12:29:59	08/05/2022 12:30:02	Completed	Budget 202
Use Local File Use Azure b Container	Mary Leonard	08/13/2022 11:50:04	08/13/2022 11:50:09	Completed	User Buda
User Azure File Share	Mary Leonard	08/13/2022 11:52:06	08/13/2022 11:52:10	Completed	User Budg
User SQL Server Database	Mary Leonard	08/13/2022 12:02:00	08/13/2022 12:02:03	Completed	User Budg
User Azure SQL Database	Karen Shype	08/17/2022 11:13:03	08/17/2022 11:13:07	Completed	Budget 20
User	Karen Shype	08/17/2022 11:15:54	08/17/2022 11:15:57	Completed	Budget 20
User 🔶 Learn M		10/10/2019 12:38:39	10/10/2019 12:38:47	Completed	Forecast P
User Hondease	Mary Leonard	10/10/2019 12:40:02	10/10/2019 12:40:36	Completed	Product wi
Organize Vew folder		~	Search 7.6 Test Impo		
Organize New folder This PC	Name				~
·	Name			• 🔳 🕐	~
Inis PC	Name			• 🔳 🕐	~
 This PC 3D Objects Desktop 	Name			• 🔳 🕐	
 This PC 3D Objects 	Name			• 🔳 🕐	~
 This PC 3 Dobjects Desktop Documents 				Ype	N
 This PC 3 Dobjects Desktop Documents Downloads 				Ype	~
 This PC 3 Dobjects Desktop Documents Downloads Music 				Ype	~
 This PC 3 Dobjects Desktop Documents Downloads Music Pictures 				Ype	N
 This PC 3 D Objects Desktop Documents Downloads Music Pictures Videos 				Ype	~
 This PC 3 D Objects Desktop Documents Downloads Music Pictures Videos 				Ype	
 This PC 3 D Objects Desktop Documents Downloads Music Pictures Videos 	Historical Point of S			Ype	
 This PC 3D Objects Desktop Documents Downloads Music Pictures Videos Windows-SSD (C:) 	Historical Point of S			Type Text Docume	~
 This PC 3 D Objects Desktop Documents Downloads Music Pictures Videos Windows-SSD (C:) 	Historical Point of S		Custom files	Type Text Docume	

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	Help

				Data Mappir	ng - Data Import		
Description: Importi	on optior	cal point of sales data		l us how to treat data for t	·	uration Z Delete Category Data	
Date	•	Dimension	•	Dimension	Ignore	Measure V	Measure B
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	11	04 New England	10781.52774	1983.5799
2020-01-03			50	11	05 Great Lakes	1535.0991	256.9116
2020-01-03			51	11	02 Gulf Coast	4956.05974	876.8926
2020-01-03			51	11	03 Midlantic	5347.29324	987.5380
2020-01-03			52	11	01 South Central	8326.19418	1537.5953
2020-01-03			52	11	06 Great Plains	5382.35997	992.3809
2020-01-03			53	11	00 Southwest	3714.50692	2 600.03024
2020-01-03			53	11	07 Northwest	3508.27814	604.0557
2020-01-03			54	11	11 Eastern Atlantic Provinces	8741.56617	7 1593.9468
2020-01-03			55	11	08 Western Provinces	4009.60886	5 754.6445
2020-01-03			55	11	09 Central Provinces	5197.50859	882.4314
2020-01-13			50	11	04 New England	10781.52774	1983.5799
2020-01-13			50	11)5 Great Lakes	1535.0991	256.9116

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.

		Da	ata Import Templat	tes	x
				2	
Name:	Point of	Sales Data, Amour	nts and Units		
Description:	Data for	POS by Territory			
Type:	Global				~
1)201			• • •		-
	_	e Category Data B			
A	Allow	Schema Drift And	Continue Processing		
Configuration:					
Source Of Data For Source Type:		Local File Text			A
Target Category:		User POS			
Delimiter:		Tab			
Field Quote:		Double Quotes			
licia Quotoi		boable 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
		1			
•					E E
Created Date:	05/17/20	24 11:21:14			
Owner:	Karen Sl	harpey			
Last Updated Date:	05/17/20	24 11:21:14			
Last Updated By:					
Last Used Date:					
Last Used By:					
Template ID:					
•					

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 🛛 🗖 — 🗆 🗙										
	File Home	Insert Page	Layout Fo	ormulas Data	Review View	Add-ins Help PDF	ACROBAT Team) Tell me 🖻 🖓			
	$1705 \cdot : \times \checkmark f_x$										
1											
4	<u> </u>	8	C	D	<u> </u>	F.	G				
1	Days	Distribution Channel	Product Class	Description	Product Category	Description	Sales Event 3	Sales Event 4			
2	2019-01-03	DIR	в	Branded	200	esh Vegetables	150	737			
3	2019-01-03	DIR	В	Branded	201	d Fruit	468	1,936			
4	2019-01-03	DIR	В	Branded	202		75	438			
5	2019-01-03	DIR	В	Branded	203	1 Header	87	493			
6	2019-01-03	DIR	В	Branded	204	Row	224	931			
7	2019-01-03	DIR	В	Branded	207		42	253			
8	2019-01-03	DIR	В	Branded	208	lers		973			
9	2019-01-03	DIR	0	Other	200	Fresh Vegetables	132	608			
10		DIR	0	Other	204	Fresh Fruit	22	45			
11		INB	В	Branded	200	Fresh Vegetables	313	1,593			
12	2010-01-00			d	201	Canned Fruit	2,109	12,616			
13		INB	Dates in	;d	202	Pork	184	1,183			
14		INB 1e	t Colun	d	203	Beef	108	601			
15		IND	Colum	su	204	Fresh Fruit	319	1,540			
16		INB	-	ed	207	Frozen Fruit Products	85	608			
17		INB	B	Branded	208	Frozen Prepared Dinners		2,570			
18		INB	0	Other	200	Fresh Vegetables	113	545			
19		INB	0	Other	204	Fresh Fruit	28	65			
20	2010 01 00	INB	P	Private Label	201	Canned Fruit	1,675	7,782			
21		INW	B	Branded	200	Fresh Vegetables	461	2,377			
	E E	vents Data Fo	r POS	(\pm)				•			
							▦ ▣ ▣	+ 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 N	1apping - Data Impo	ort			
Use the Config	O O I o intrion options and Mapping previ otionally enter a description for this im import your data or click Add Templat	port	·	Configuration Delete Categ	gory Data Before Impor	Mapping Controls At Top]	
Ignore	▼ Ignore	▼ Ignore	▼ Ignore	▼ Ignore	▼ Ignore /	▼ Ignore	▼ Ignore	▼
	•	T	T	•	T	T	T	v
Days	Distribution Channel	Product Class	Description	Product Category	Description	Sales Event	3 Sales Event	4
2019-01-03	DIR	В	Branded		200 Fresh Vegetable	5	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		В	Branded		203 Beef		87	493
2019-01-03	1 1	В	Branded		204 Fresh Fruit		224	931
2019-01-03	Header Row	В	Branded		207 Frozen Fruit Pro	ducts	42	253
2019-01-03		В	Branded		208 Frozen Prepared	Dinners	119	973
2019-01-03	From Import	0	Other		200 Fresh Vegetable	5	132	608
2019-01-03		0	Other		204 Fresh Fruit		22	45
2019-01-03	IND	В	Branded		200 Fresh Vegetable	5	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	INB	В	Branded		204 Fresh Fruit		319	1,540
2019-01-03	INB	В	Branded		207 Frozen Fruit Pro	ducts	85	608
2019-01-03	INB	В	Branded		208 Frozen Prepared	Dinners	293	2,570
2019-01-03	INB	0	Other		200 Fresh Vegetable	5	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	1apping - Dat	ta Import			
	on options and Mapping preview historical Point of Sales Data	to tell us how to treat da	ta for the import.	Configuration	Delete Category Data Befc	ore Impor		
· · ·	rt your data or click Add Template fi							
Date	Dimension	▼ Dimension	▼ Ignore	Dimension	n 🔻 Ign	nore 🗸 🗸	Measure	Measure V
yyyy-mm-dd	Distribution Channel	Product Class	T	Product C	Category 🔻	•	User POS Unit 3	User POS Unit 4
Days	Distribution Channel	Product Class	Description	Product (Category Des	scription	Sales Event 3	Sales Event 4
2019-01-03	DIR	В	Branded		200 Fres	sh Vegetables	15	0 737
2019-01-03	DIR	В	Branded		201 Can	nned Fruit	46	8 1,936
2019-01-03	DIR	В	Branded		202 Pork	k	7	5 438
2019-01-03	DIR	В	Branded		203 Beef	f	8	493
2019-01-03	DIR	В	Branded		204 Fres	sh Fruit	22	4 931
2019-01-03	DIR	В	Branded		207 Froz	zen Fruit Products	4	2 253
2019-01-03	DIR	В	Branded		208 Froz	zen Prepared Dinners	11	9 973
2019-01-03	DIR	0	Other		200 Fres	sh Vegetables	13	2 608
2019-01-03	DIR	0	Other		204 Fres	sh Fruit	2	2 45
2019-01-03	INB	В	Branded		200 Fres	sh Vegetables	31	3 1,593
2019-01-03	INB	В	Branded		201 Can	nned Fruit	2,10	9 12,616
2019-01-03	INB	В	Branded		202 Pork	k	18	4 1,183
2019-01-03	INB	В	Branded		203 Beel	f	10	8 601
2019-01-03	INB	В	Branded		204 Fres	sh Fruit	31	9 1,540
2019-01-03	INB	В	Branded		207 Froz	zen Fruit Products	8	5 608
2019-01-03	INB	В	Branded		208 Froz	zen Prepared Dinners	29	3 2,570
2019-01-03	INB	0	Other		200 Fres	sh Vegetables	11	3 545
2019-01-03	INB	0	Other		204 Fres	sh Eruit		8 65

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.

Au	toSave 💽 0		~ ∓ Impo	ort Sales For Future Forecasting Time Serie	es.xlsx - Saved		• •	-		
File	Home	Insert Page L	ayout Formulas	Data Review View Add-ins	Help PDF	ACROBAT Te	am 🔎 Tell	me 🖻 🖓		
$130 \cdot : \times \checkmark f_x$										
			2		-	-	0			
	A	В	С	D	E Sales	F Sales	G Sales	H		
1					November	December	January	February		
(–					November		January			
3 1	RepBroker	Description	Customer Ship-To	Description	2020-11-01	2020-12-01	2021-01-01	2021-02-01		
4 30	0	Nicole Toscano	101100BEWO	Wilder Foods St Louis MO WOB	93,474	88,850	103,857	108,389		
5 30	0	Nicole Tosc	101106JEWO	Wilder Foods St Louis MO WOJ	84,127	79,965	93,471	97,550		
6 30	0 🦰	- 5	101106IEWO	Wilder Foods St Louis MO WOI	79,453	75 522	88,278	92,130		
7 30	0		101106	Wilder Foods St Louis MO	77,50		82,518	89,402		
B 30	0	3 Header	101106HEWO	Wilder Foods St Louis MO WOH	74,78	Dates in	83,086	86,711		
9 30	0	Rows	101106GEWO	Wilder Foods St Louis MO WOG	70,10	3rd Row	77,893	81,292		
0 30	0		101106FEWO	Wilder Foods St Louis MO WOF	65,43	STU KOW	72,700	75,872		
1 30	0	INICOLE LOSCANO	101106EEWO	Wilder Foods St Louis MO WOE	60,758	,	67,507	70,453		
2 30	0	Nicole Toscano	101103BEWO	Wilder Foods Buffalo NY WOB	56,185	56,133	64,276	63,827		
3 30	0	Nicole Toscano	101106DEWO	Wilder Foods St Louis MO WOD	56,085	53,310	62,314	65,033		
4 30	0	Nicole Toscano	101106CEWO	Wilder Foods St Louis MO WOC	51,411	48,867	57,121	59,614		
5 30		Nicole Toscano	101103JEWO	Wilder Foods Buffalo NY WOJ	50,566	50,519	57,848	57,445		
6 30		Nicole Toscano	101103IEWO	Wilder Foods Buffalo NY WOI	47,757	47,713	54,635	54,253		
7 30		Nicole Toscano	101106AEWO	Wilder Foods St Louis MO WOA	46,737	44,425	51,928	54,194		
8 30		Nicole Toscano	101106KEWO	Wilder Foods St Louis MO WOK	46,737	44,425	51,928	54,194		
9 30		Janice Tierney	101117BEWO	Harrington's St Louis MO WOB	25,915	27,152	29,843	29,796		
0 30		Janice Tierney	101117JEWO	Harrington's St Louis MO WOJ	23,324	24,437	26,859	26,816		
1 30		Janice Tierney	101117IEWO	Harrington's St Louis MO WOI	22,028	23,079	25,366	25,327		
20		se For Forecasting		Harrington's St.Louis MO.MOH	20 722	01 701	22 071	22 0 27		
-		se ror rorecasting	(+)		•			•		
<u>h</u>							───	+ 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 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	- Data Import			
Description: Optic	ation options and Mapping preview mally enter a description for this impo	ort	Configuratio	n 🗌 Delete Category Data Befo	Contr	ping ols At op	
Ignore	▼ Ignore	▼ Ignore	▼ Ignore ▼	Ignore 🗸 🗸	Ignore 🗸 🗸	Ignore 🔻 1	Ignore 🔻
	T	T	v v	T	T	T	
				Sales	Sales	Sales S	ales
				November	December	January F	ebruary
RepBroker	Description	Customer Ship-To	Description	2020-11-01	2020-12-01	2021-01-01 2	021-02-01
	300 Nicole Toscano	101106BEWO	Wilder Foods St Louis MO WOB	93,474		103,857	108,38
	300 Nicole Toscano	101106JEWO	Wilder Foods St Louis MO WOJ	84,127			97,55
	300 Nicole Toscano	101106IEWO	Wilder Foods St Louis MO WOI	79,453			92,13
		101106	Wilder Foods St Louis MO	77,501		,	89,4
	3 Header	101106HEWO	Wilder Foods St Louis MO WOH	74,780		83,086	86,7
	Rows From	101106GEWO	Wilder Foods St Louis MO WOG	70,106		77,893	81,2
		101106FEWO	Wilder Foods St Louis MO WOF	65,432			75,8
	Import	101106EEWO	Wilder Foods St Louis MO WOE	60,758			70,4
		101103BEWO	Wilder Foods Buffalo NY WOB	56,185			63,82
	300 Nicole Toscano	101106DEWO	Wilder Foods St Louis MO WOD	56,085		62,314	65,03
	300 Nicole Toscano	101106CEWO	Wilder Foods St Louis MO WOC	51,411		57,121	59,61
	300 Nicole Toscano	101103JEWO	Wilder Foods Buffalo NY WOJ	50,566			57,44
	300 Nicole Toscano	101103IEWO	Wilder Foods Buffalo NY WOI	47,757		54,635	54,2
						51,928	
	300 Nicole Toscano 300 Nicole Toscano	101106AEWO 101106KEWO	Wilder Foods St Louis MO WOA Wilder Foods St Louis MO WOK	46,737 46,737		51,928	54,1

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	g - Data Import			
Description: Impor	tion option	ata for Forecasting work	w to tell us how to treat data fo	Configurat	ion Delete Category Data Bef	Sele	oping ctions	
Dimension	•	Ignore	▼ Dimension	▼ Ignore ▼	Measure 🔻	Measure 🗸 🗸	Measure 🗸	Measure 🔻
RepBroker	•		Customer Ship-To	T	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
		Nicole Toscano	101106BEWO	Wilder Foods St Louis MO WOB	93,474	88,850	103,857	,
	300	Nicole Toscano	101106JEWO	Wilder Foods St Louis MO WOJ	84,127	7 79,965	93,471	97,550
	300	Nicole Toscano	101106IEWO	Wilder Foods St Louis MO WOI	79,453	3 75,522	88,278	92,130
	300	Nicole Toscano	101106	Wilder Foods St Louis MO	77,501			
	300	Nicole Toscano	101106HEWO	Wilder Foods St Louis MO WOH	74,780	71,080	83,086	86,711
	300	Nicole Toscano	101106GEWO	Wilder Foods St Louis MO WOG	70,106	66,637	77,893	81,292
	300	Nicole Toscano	101106FEWO	Wilder Foods St Louis MO WOF	65,432	2 62,195	72,700	75,872
	300	Nicole Toscano	101106EEWO	Wilder Foods St Louis MO WOE	60,758			
	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	62,314	65,033
	300	Nicole Toscano	101106CEWO	Wilder Foods St Louis MO WOC	51,411	48,867	57,121	59,614
	300	Nicole Toscano	101103JEWO	Wilder Foods Buffalo NY WOJ	50,566	50,519	57,848	57,445
	300	Nicole Toscano	101103IEWO	Wilder Foods Buffalo NY WOI	47,757	47,713	54,635	54,253
	300	Nicole Toscano	101106AEWO	Wilder Foods St Louis MO WOA	46,737	44,425	51,928	54,194
	300	Nicole Toscano	101106KEWO	Wilder Foods St Louis MO WOK	46,737	44,425	51,928	54,194
	305	Janice Tierney	101117BEWO	Harrington's St Louis MO WOR	25.91	27 152	29.847	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.

 - 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

 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.

	AutoSave 💽 🖸 ile Home		C ⊂ ∓ Layout F			019-10-16.xlsx - Saved Add-ins Help PDF	ACROBAT	Team 🔎	- □ > Tell me
7	05 -		$\sqrt{f_x}$						
	٨	P	C	D	F	F	c		Ц
ĺ	Days	Distribution Channel	Product Class	Description	Product Category	Description	Sales E	Event 3	Sales Event 4
	2019-01-03	DIR	В	Branded	200	esh Vegetables		150	737
(2019-01-03	DIR	В	Branded	201	C ed Fruit		468	1,936
	2019-01-03	DIR	В	Branded	202			75	438
	2019-01-03	DIR	В	Branded	203	1 Header		87	493
	2019-01-03	DIR	В	Branded	204	Row		224	931
-	2019-01-03	DIR	В	Branded	207	NOW		42	253
-	2019-01-03	DIR	В	Branded	208	ers		119	973
	2019-01-03	DIR	0	Other	200	Fresh Vegetables		132	608
1	2019-01-03	DIR	0	Other	204	Fresh Fruit		22	45
1	2019-01-03	INB	В	Branded	200	Fresh Vegetables		313	1,593
	2019-01-03 🐂			d	201	Canned Fruit		2,109	12,616
	2019-01-03		Dates in		202	Pork		184	1,183
	2019-01-03		t Colun	d	203	Beef		108	601
	2019-01-03	IND	Colum	² u	204	Fresh Fruit		319	1,540
	2019-01-03	INB		ed	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	INB	0	Other	204	Fresh Fruit		28	65
٦.	2019-01-03	INB	P	Private Label	201	Canned Fruit		1,675	7,782
1	2019-01-03	INW	В	Branded	200	Fresh Vegetables		461	2,377
	E	vents Data Fo	or POS	(+)		E .			
								四 -	+ 709

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.

	AutoSave 💽 C	l 日 ら	· C+ - +	Sales Eve	ent -	Transactions 20	19-10-16.xlsx - Excel	-	团	- 0 ×
F	ile Home	Insert Page	Layout Fo	ormulas Data	Re	eview View	Add-ins Help PDF A	ACROBAT	Team 🔎	Tell me 🖻 🖓
17	05 -	: × ·	$\sqrt{f_x}$							~
	А	B	C	D		F	F		G	H
1	Days	Distribution Channel	Product Class	Description		Product Category	Description	Sales	Event 3	Sales Event 4
2	2019-01-03	DIR	В	Branded	2	200	Fresh Vegetables		150	737
3	2019-01-03	DIR	В			201	Canned Fruit		468	1,936
4	2019-01-03	DIR	B Din	nension	2	202	Pork		75	438
5	2019-01-03	DIR	В	alues		203	Beef		87	493
6	2019-01-03	DIR	В	alues		204	Fresh Fruit		224	931
7		DIR	В			207	Frozen Fruit Producto		42	253
8	2019-01-03	DIR	В	Branded		208	Frozen Prepa		119	973
9	2019-01-03	DIR	0	Other		200	Fresh Vegeta Meas		132	608
10	2019-01-03	DIR	0	Other	2	204	Fresh Fruit Valu	es	22	45
11		INB	В	<u> </u>		200	Fresh Vegeta		313	1,593
12	2019-01-03	INB	B Din	nension	2	201	Canned Fruit		2,109	12,616
13	2019-01-03	INB	В			202	Pork		184	1,183
14	2019-01-03	INB	D	alues		203	Beef		108	601
		INB	В			204	Fresh Fruit		319	1,540
16		INB		Branded		207	Frozen Fruit Products		85	608
17		INB 🥌	В	Branded	_	208	Frozen Prepared Dinners		293	2,570
		INB	0	Dther		200	Fresh Vegetables		113	545
		INB	0	Other		204	Fresh Fruit		28	65
		INB	P	Private Label		201	Canned Fruit		1,675	7,782
21	2019-01-03	INW	В	Branded	2	200	Fresh Vegetables		461	2,377
	<	vents Data Fo	or POS	+	× ×		: •			
Rea	ady 🔝] 🛄 🗕 –	+ 70%

2. Open File & Set Up Import Properties

An import starts with choosing the Excel file.

Open					×
$\leftarrow \rightarrow \checkmark \uparrow$		~ U			٩
Organize 🝷 New folder				•	?
🧢 This PC	^	Name		Date modified	Туре
1		1		10/31/2019 3:51 PM	File
U		Import Sales For Future Forecasting Time Series.xlsx		10/18/2019 8:26 A	Mici
		Sales Event Transactions 2019-10-16.xlsx		10/16/2019 9:03 PM	Mic
		📓 UCD Daily ShipTo Region Territory Transactions For	∠u 19.xlsx	10/16/2019 7:21 PM	Mici
😍 Windows (C:)	~	٤			>
					_
File name: Sales Event	Trans	actions 2019-10-16.xlsx ~	Microsot	xcel Worksheet (*.xls	~
			Oper	n 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 Ma	oping - Data Impo	ort	
Description: Optionally e	options and Mapping preview to anter a description for this import our data or click Add Template firs		·	Use Mapping Properties To Map Your Data To Stratum Data	a Before Import
Ignore	▼ Ignore	▼ Ignore	▼ Ignore	▼ Ignore ▼	Ignore 🔻
Days	Distribution Channel	Product Class	▼ Description	Product Category	Description
2019-01-03	UIR	D	Dianueu		orresh vegetables
2019-01-03	DIR	В	Branded		01 Canned Fruit
2019-01-07		В	Branded		02 Pork
2019-0	° °	В	Branded		13 Beef
	Row From	В	Branded		04 Fresh Fruit
dmport Fi	😥, Alwayso 📃 📃	В	Branded	20	7 Frozen Fruit Products
	In Green	В	Branded	20	08 Frozen Prepared Dinners
2019-01		0	Other	20	00 Fresh Vegetables
019-01	0 0	0	Other	20	04 Fresh Fruit
019-01-03	INB	В	Branded	20	0 Fresh Vegetables
019-01-03	INB	В	Branded	20	01 Canned Fruit
019-01-03	INB	В	Branded	20	02 Pork
019-01-03	INB	В	Branded	20	3 Beef
2019-01-03	INB	В	Branded	20	94 Fresh Fruit
2019-01-03	INB	В	Branded	20	7 Frozen Fruit Products
2019-01-03	INB	В	Branded	20	8 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.

	ly enter a description for this impo			Configura	ation Delete Category Data	Before Import
Ignore	rt your data or click Add Template	first to save mapping for futur	v Ignore	•	Ignore V	Ignore 🗸
Dimension		•	•	•	v	T
Date	Distribution Channel	Product Class	Description	•	Product Category	Description
Ignore	DIR	В	Branded		200	Fresh Vegetables
2019-01-03	UR	В	Branded		201	Canned Fruit
2019-01-03	D IR	В	Branded		202	Pork
2019-01-03	UR	В	Branded		203	Beef
2019-01-03	UR	В	Branded		204	Fresh Fruit
2019-01-03	UR	В	Branded		207	Frozen Fruit Products
2019-01-03	UR	В	Branded		208	Frozen Prepared Dinners
2019-01-03	UR	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	Canned Fruit
2019-01-03	INB	В	Branded		202	Pork

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

			Data Mapp	oing - Data Imp	ort				
Description: Optional	n options and Mapping preview	t		·	Configural	tion 🗆 D	elete Catego	ory Data	Before Import
Date	rt your data or click Add Template fi		Dimension	▼ Ignore	T	Dimension		•	Ignore
yyyy-mm-dd	Distribution Channel	-	Product Class	T		Product Ca	00001	T	
Days	Distribution Channel	ľ	Product Class	•	•		tegory	•	Description
2019-01-03	DISTIBUTION CHAINCE		Product Purchasing UM				cogory	200	Fresh Vegetables
2019-01-03	DIR	+	Product User Controlled						Canned Fruit
019-01-03	DIR		Product Brand			-			Pork
019-01-03	DIR		Product Category			-			Beef
2019-01-03	DIR		Product Category Role			-			Fresh Fruit
2019-01-03	DIR		Product Class						Frozen Fruit Products
2019-01-03	DIR			trolled PClas Department					Frozen Prepared Dinners
019-01-03	DIR			trolled PClas Promotion Cod	е	_			Fresh Vegetables
2019-01-03	DIR		Product Family			-			Fresh Fruit
019-01-03	INB		Product Group					200	Fresh Vegetables
2019-01-03	INB			ntrolled PGrp Marketing Cod	е				Canned Fruit
2019-01-03	INB		Product Group User Cor Product SubClass	ntrolled PGrp Sales Division				202	Pork
019-01-03	INB		Product Subclass Product Type					203	Beef
2019-01-03	INB		Product Type Product Type Short Des	crintion				204	Fresh Fruit
2019-01-03	INB		Region	anpaton (207	Frozen Fruit Products
019-01-03	INB		RepBroker					208	Frozen Prepared Dinners
019-01-03	INB		Rep Broker State					200	Fresh Vegetables
019-01-03	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 Ma	pping	g - Data Import	t				
Jse the Configuration		ns and Mapping previ	ew to te	ll us how to treat dat	a for the	e import.					
Description: Optiona	lly enter a	a description for this im	port			Co	onfigu	ration Delete Category	Data B	efore Import	
Click Process to impo	rt vour d	ata or click Add Templa	te first to	save mapping for futur	e use. A	dd Template					
Dimension	•	Ignore	•	Dimension	T	Ignore	4	Measure	•	easure	•
Product Class	•		•	Product Category	•		,	- Select a Target -	v (er POS Unit 4	•
Product Class		Description		Product Category		Description		User POS Amt 1	S	les Event 4	
}		Branded			200	Fresh Vegetables		User POS Amt 2			737
1		Branded			201	Canned Fruit		User POS Amt 3			1,936
1		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
1		Branded			207	Frozen Fruit Products		User POS Unit 3			253
l .		Branded			208	Frozen Prepared Dinners		User POS Unit 4			973
)		Other			200	Fresh Vegetables			122		608
)		Other			204	Fresh Fruit			22		45
ł		Branded			200	Fresh Vegetables			313		1,593
		Branded			201	Canned Eruit			109		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	apping - D	ata Import	t
Jse t Submit The Data	Import For Processing	ı to tell us how to treat da	ita for the impo	rt.	
Description: Point of Sal	es Units Data			Co	nfiguration Del
Click Process to import y	our data or click Add Template f	irst to save mapping for futu	ire use. Add Tem	plate	
Dimension	▼ Ignore	▼ Dimension	▼ Ignore	1	▼ Measure
Product Class	•	Product Category	T		▼ User POS Uni
Product Class	Description	Product Category	Descri	ption	Sales Event (
В	Branded		200 Fresh V		
В	Branded		201 Canned	l Fruit	
В	Branded		202 Pork		
В	Branded		203 Beef		
ଅ୨ଅ↑	🗸 🚽 🗧 A Stratum Da	ta Import Has Completed	I - Message	<u>n</u> –	
日 🥬 ひ ↑ File Message	• ↓ = A Stratum Da Help Acrobat ⊊	ta Import Has Completed 〉 Tell me what you w		P –	
File Message	V			D –	
File Message	V	〉Tell me what you w		— —	□ × 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 Sa	les E	vent P	OS Analysis			
-	0				0			3 1 to 50 of 208	8 0000) 1 to 3 of 3
	Rows: umns:	∷ <u>Year: 2019</u> × > +	∷ <u>Days: All</u> ×	Distribution Channel	nel: All ×	> ::: <u>Pro</u>	duct Class: All 🗙 🕻 🗄	Product Categor	r <u>y: All</u> × ≯ ⊞F	▶ +
View	Filter:	+								
<u>Year</u>	<u>Days</u>	Distribution Channel	Product Class	PClas Long Description	<u>Produc</u>	<u>t Category</u>	PCat Long Description	User POS Unit 3	User POS Unit 4	Existing Sales, Other Channels
2019	<u>January 3</u>	DIR	B	Branded	<u>200</u>		Fresh Vegetables	150	737	6,208
					<u>201</u>		Canned Fruit	468	1,936	16,826
					202			75		3,593
					<u>203</u>	Heal	mported	87		4,060
					<u>204</u> 207		In Views ts	224 42		8,088 2,063
					207	Data	nners	42		7.645
			<u>o</u>	Other	200			132		5,181
			-		204		Fresh Fruit	22		470
		INB	B	Branded	200		Fresh Vegetables	313	1,593	13,344
					<u>201</u>		Canned Fruit	2,109	12,616	103,073
					<u>202</u>		Pork	184	1,183	9,566
					<u>203</u>		Beef	108	601	4,964
					<u>204</u>		Fresh Fruit	319		13,011
					<u>207</u>		Frozen Fruit Products	85		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 (• •	۲۰ 🖽	G	Imp	ort Sales Fo	or Future Forecasting Time	Serie	s.xlsx - Saved		• -	- 🗆 X
F	ile Ho	me	Insert Pa	ige L	ayout Formulas.	Data	·····	-ins	Help PDF	ACROBAT T	eam 🔎 Tell	me 🖻 🖵
J2!	5	Ŧ	: × •	/	f_x		Dates in 2nd Row					•
	А		В		С				Е	F	G	H
1									November	December	January	February
2									2020-11-01	2020-12-01	2021-01-01	2021-02-01
	RepBrok	ær	Descriptior	ı	Customer Ship-To		Description		Forecast	Forecast	Forecast	Forecast
	300		NICOLE LOSCANO	1	101106BEVVO	vviider Fo	DOUR St LOUIS MO VVOB		93,474	88,850	,	108,389
	300				101106JEWO	Wilder Fo	oods St Louis MO WOJ		84,127	79,965	93,471	97,550
_	300	3	Header		101106IEWO		oods St Louis MO WOI		79,453	75,522	88,278	92,130
	300				101106		oods St Louis MO		77,501	70,586	,	89,402
	300		Rows		101106HEWO		oods St Louis MO WOH		74,780	71,080	,	86,711
_	300	_			101106GEWO	_	oods St Louis MO WOG		70,106	66,637	77,893	81,292
	300		Nicole Toscano		101106FEWO	_	oods St Louis MO WOF		65,432	62,195	,	75,872
	300		Nicole Toscano		101106EEWO	Wilder Foods St Louis MO WOE		60,758	57,752	67,507	70,453	
	300		Nicole Toscano		101103BEWO		Wilder Foods Buffalo NY WOB		56,185	56,133	64,276	63,827
	300		Nicole Toscano		101106DEWO	Wilder Fo	Wilder Foods St Louis MO WOD		56,085	53,310	62,314	65,033
	300		Nicole Toscano		101106CEWO	_	oods St Louis MO WOC		51,411	48,867	57,121	59,614
	300		Nicole Toscano		101103JEWO	Wilder Fo	oods Buffalo NY WOJ		50,566	50,519	57,848	57,445
	300		Nicole Toscano		101103IEWO	_	oods Buffalo NY WOI		47,757	47,713	54,635	54,253
	300		Nicole Toscano		101106AEWO		oods St Louis MO WOA		46,737	44,425	51,928	54,194
	300		Nicole Toscano		101106KEWO	_	oods St Louis MO WOK		46,737	44,425	· · ·	54,194
	305		Janice Tierney		101117BEWO		n's St Louis MO WOB		25,915	27,152	29,843	29,796
	305		Janice Tierney		101117JEWO	Harringto	n's St Louis MO WOJ		23,324	24,437	26,859	26,816
	305		Janice Tierney		101117IEWO	Harringto	n's St Louis MO WOI		22,028	23,079	,	25,327
22	205	1 14	se For Forecas	tine		Horringto	in'o St Louis MO MOU		20 722	01 701	22 074	<u></u>
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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.

AutoS	Save 💽 🤇	le 5・	⊇ - Imp	ort Sales For Fut	ure Forecasting	Time Seri	es.xlsx - S	Saved		- 1	- 🗆 🗙
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2							2020-1	11-01	2020-12-01	2021-01-01	2021-02-01
3 Rep	pBroker	Description	Customer Ship-To	[Description		Fore	cast	Forecast	Forecast	Forecast
4 300		Nicole Toscano	101106BEWO	Wilder Foods -	St Louis MO V	VOB		93,474	88,850	103,857	108,389
5 300		ke i T	1106JEWO	Wilder Foods -	St Louis MO V	VOJ		84,127	79,965	5 93,471	97,550
6 300		Dimension	1106IEWO	Wilder Foods				79,453	75,522	2 88,278	92,130
7 300			<u>)1106</u>	Wilder Foods	Measu	ire		77,501	70,586	/	89,402
8 300		Values	01106HEWO	Wilder Foods	Value	S		74,780	71,080	,	86,711
9 300			01106GEWO	Wilder Foods -				70,106	66,637		81,292
10 300		Nicole Toscano	101106FEWO		- St Louis MO V	and the second se		65,432	62,195		75,872
11 300		Nicole Toscano	101106EEWO	Wilder Foods -	St Louis MO V	VOE		60,758	57,752		70,453
12 300		Nicole Toscano	101103BEWO	Wilder Foods -	Buffalo NY W(DB		56,185	56,133	64,276	63,827
13 300		Nicole Toscano	101106DEWO	Wilder Foods -	St Louis MO V	VOD		56,085	53,310	62,314	65,033
14 300			101106CEWO	Wilder Foods -	St Louis MO V	VOC		51,411	48,867	7 57,121	59,614
15 300		Dimension	101103JEWO	Wilder Foods -	Buffalo NY W() J		50,566	50,519	57,848	57,445
16 300		Values	101103IEWO	Wilder Foods -	Buffalo NY WO	DI I		47,757	47,713	3 54,635	54,253
17 300			101106AEWO	Wilder Foods -	St Louis MO V	VOA		46,737	44,425	5 51,928	54,194
18 300		INICOLE LOSCANO	101106KEWO	Wilder Foods -	St Louis MO V	VOK		46,737	44,425	5 51,928	54,194
19 305		Janice Tierney	01117BEWO	Harrington's	St Louis MO W	ОВ		25,915	27,152	2 29,843	29,796
20 305		Janice Tierney	101 17JEWO	Harrington's	St Louis MO W	OJ		23,324	24,437	7 26,859	26,816
21 305		Janice Tierney	101117IEWO	Harrington's	St Louis MO W	01 💧		22,028	23,079	25,366	25,327
202		se For Forecasti		Harrington's	St.Louis MO M			<u> </u>	21.721	1 22 074	22.027
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2. Open File & Set Up Import Properties

An import starts with choosing the Excel file.

Open						\times
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interview and the second secon	^	Name	^		Date modified	Тур
6		1			10/31/2019 3:51 PM	l File
U		Import Sales For Future F	orecasting Time Series.xlsx		10/18/2019 8:26 A	Mic
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File name: Import Sale	s For	or Future Forecasting Time Series.x	lsx ~	Microsoft E	v el Worksheet (*.xls	\sim
				Open	Cancel	
				Open	Cancer	

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.

		Dat	ta Mapping	- Data Impo	ort		
008				(U	se Mapping		
	ation options and Mapping preview	v to tell us how to treat data fo	or the import.	Prop	perties To Note To Note To To Note To	Лар	
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	mport your data or click Add Template		se Add Template				
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-5	v	▼	v			v	v
		•	•	· ·	November	December	January
					2020-11-01	2020-12-01	2021-01-01
RepBroker	Description	Customer Ship-To	Description		Forecast	Forecast	Forecast
	200 Nicele Tessen	10110585WO	Wilder Feede	Ct Louis MO WOB		02,474	00,050
		101106JEWO	Wilder Foo		- 5	84,127	79,965
		101106IEWO	Wilder Foo			79,453	75,522
H	eader Rows From 📗	101106	Wilder Foo	Dates I		77,501	70,586
In	nport File, Always	101106HEWO	Wilder Foo	2nd Heade	r Row	74,780	71,080
	Shaded In Green	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 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		St Louis MO WOA	1	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.

			l	Data I	Mapping - Data Impo	ort				
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the Configura	tion options and Mapping previ	iew to tel	ll us how to treat da	nta for the	e import.					
scription: Option	nally enter a description for this in	nport			Configuratio	on Delete Category [Data Befo	re Import		
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ick Process to im	port your data or click Add Templa	ite first to	save mapping for futu	ire use. A	Add Template					
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Dimension	- Ignore		Ignore			Ignore		ignore	•	ignore
leasure	6	•		•	▼		•		•	
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-						2020-11-01		2020-12-01		2021-01-01
pBroker	Description		Customer Ship-To		Description	Forecast		Forecast		Forecast
	300 Nicole Toscano		101106BEWO		Wilder Foods St Louis MO WOB		93,474		88,850	
	300 Nicole Toscano		101106JEWO		Wilder Foods St Louis MO WOJ		84,127		79,965	
	300 Nicole Toscano		101106IEWO		Wilder Foods St Louis MO WOI		79,453		75,522	
	300 Nicole Toscano		101106		Wilder Foods St Louis MO		77,501		70,586	
	300 Nicole Toscano		101106HEWO		Wilder Foods St Louis MO WOH		74,780		71,080	
	300 Nicole Toscano		101106GEWO		Wilder Foods St Louis MO WOG		70,106		66,637	
	300 Nicole Toscano		101106FEWO		Wilder Foods St Louis MO WOF		65,432		62,195	
	300 Nicole Toscano		101106EEWO		Wilder Foods St Louis MO WOE		60,758		57,752	
	300 Nicole Toscano		101103BEWO		Wilder Foods Buffalo NY WOB		56,185		56,133	
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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 - Dat	a Import		
	onfiguration options and Mappin	ng preview to tell us how to treat data	a for the import.			
Description	n: Optionally enter a description fo	or this import		Configuration 🛛 Delete Catego	ry Data Before Import	
Click Proce	ess to import your data or click Add	I Template first to save mapping for future	e use. Add Template			
	▼ Dimension	▼ Ignore ▼	Measure 🔻	Measure 🔻	Measure 🔻	feasure 🔻
	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
n	Customer Ship-To	Description	Forecast	Forecast	User Forecast Amt 3	Forecast
no	101106BEWO	Wilder Foods St Louis MO WOB	93,474	88,85	User Forecast Amt 4	108,389
no	101106JEWO	Wilder Foods St Louis MO WOJ	84,122	79,96	User Forecast Unit 1	97,550
no	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
no	101106HEWO	Wilder Foods St Louis MO WOH	74,780	71,08	User Forecast Unit 4	86,711
no	101106GEWO	Wilder Foods St Louis MO WOG	70,100	66,637	77,053	81,292
ino	101106FEWO	Wilder Foods St Louis MO WOF	65,432	2 62,195	72,700	75,872
no	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		56.001	50.010	(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.

			Data Mapping - Dat	a Import	
Se ti Submit The	Oata Import For Processing	g rev ew to tell us how to treat dat	ta for the import.		
Description: Addin	ng Forecast Details To Data H	ub		Configuration Delete Catego	ory Data
Click Process to im	nport your data or click Add T	emplate first to save mapping for futu	re use. Add Template		
•	Dimension	▼ Ignore ▼	Measure 🗸	Measure 🗸	Measu
T	Customer Ship-To	v v	User Forecast Unit 4	User Forecast Unit 4	User I
	· · ·		November	December	Janua
			2020-11-01	2020-12-01	2021-
	Customer Ship-To	Description	Forecast	Forecast	Forec
0	101106BEWO	Wilder Foods St Louis MO WOB	93,474		
0	101106JEWO	Wilder Foods St Louis MO WOJ	84,12		-
0	101106IEWO	Wilder Foods St Louis MO WOI	79,453		
File Me	ssage Help Ac	robat Q Tell me what	you want to do		
				7.	35 PM
KF A	Stratum Data Impo	ort Has Completed		7:	35 PM

		★ Mon	thly Forecastin	g Sce	narios Next	4 Months		
	XI 🖿 🍙	11 🔍 9	Q 123	0	Show Al	80091 to	50 of 225	1 to 4 of 4
Row: Column:		< ➤ ∷Customer S	hip-To: All × > II Prod	uct Brand	i× +			
View Filte	r: +							
<u>RepBroke</u>	r RepBr Long Description	Customer Ship-To	ShpTo Long Descri	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 NY	WOB	56,185	56,133	64,276	63,827
		101103IEWO	Wilder Foods Buffalo NY	WOI	47,757	47,713	54,635	54,253
		101103JEWO		KON	50,566	50,519	57,848	57,445
		<u>101106</u>	Use Imported Data In Views	D C	77,501	70,586	82,518	89,402
		101106AEWO		D WOA	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 M	-	56,085	53,310	62,314	65,033
		101106EEWO	Wilder Foods St Louis M	o wor	60,758	57,752	67,507	70,453
		101106FEWO	Wilder Foods St Louis M	o wor	65,432	62,195	72,700	75,872
		101106GEWO	Wilder Foods St Louis M	o wog	70,106	66,637	77,893	81,292
		101106HEWO	Wilder Foods St Louis M	o won	74,780	71,080	83,086	86,711
		101106IEWO	Wilder Foods St Louis M	o woi	79,453	75,522	88,278	92,130
		101106JEWO	Wilder Foods St Louis M	o wo:	84,127	79,965	93,471	97,550
		101106KEWO	Wilder Foods St Louis M	o wor	46,737	44,425	51,928	54,194
		300 Tota	ı		961,108	917,979	1,069,361	1,110,360
<u>301</u>	Patrick Hurley	101132	Prestwick Brothers Phoe	nix	13,403	7,116	9,038	9,996
		101132BCTH	Prestwick Brothers Phoe	nix THB	8,946	3,596	6,536	6,100
		101132BEWO	Prestwick Brothers Phoe	nix WOR	7 750	2 221	5 152	5 776

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			×
\leftarrow \rightarrow \checkmark \uparrow \blacksquare \rightarrow This PC \rightarrow	✓ Ŭ		P
Organize • New folder		•	?
Name	Date modified	Туре	Si
~			
*			
			>
File name: Sales-Receipts-OneOff-Event.xlsx			\sim
Save as type: Excel Workbook (*xlsx)			\sim
Authors: Tags:			
Save Thumbnail			
∧ Hide Folders	Tools 🔻 Save	Cance	

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 #
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 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 +	· · · - ·		** ***	·] *

• 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	Poulines	\$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
1	Data 1	o import 🕒	K	· · · · · · · · · · · · · · · · · · ·	•• •••	

• **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.

	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	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.

4	A	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	M 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	So	\$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	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.

	AutoSave 💽 off) 🖫 🤌 - 🖓 Sales Event Transactions 2019-10-16.xlsx - Excel 📧 ×									
F	ile Home	Insert Page	e Layout F	ormulas Data	Review View	w Add-ins Help PDF A	CROBAT Team	Tell me 🖻 🖓		
17	05 -	: ×	√ fx					~		
	А	В	С	D	E	F	G	H		
1	Days	Distribution Channel	Product Class	Description	Product Category	Description	Sales Event 3	Sales Event 4		
2	2019-01-03	DIR	В	Branded	200	Fresh Vegetables	150	737		
3	2019-01-03	DIR	В	Branded	201	Canned Fruit	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	ata On	Fresh Fruit	224	931		
7	2019-01-03	DIR	В	Bra Single Ta	b/Sheet	Frozen Fruit Products	42	253		
8	2019-01-03	DIR	В	Bra		Frozen Prepared Dinners	119	973		
9	2019-01-03	DIR	0	Oth		Fresh Vegetables	132	608		
10	2019-01-03	DIR	0		207	Fresh Fruit	22	45		
	2010 0	INB	B	1 oranded	200	Fresh Vegetables	313	1,593		
10		vents Data Fo	or POS	Prandad +	201	Copped Fruit	2 100	12.616		
							Ⅲ □ □	+ 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.

	Α	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 Desc	cription 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 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
		Nicole Toscano		Wilder Foods St Louis MO WOC	51,411	48,867	57,121
		Nicole Toscano	Eliminate Null	Wilder Foods Buffalo NY WOJ	50,566	50,519	57,848
		Nicole Toscano		Wilder Foods Buffalo NY WOI	47,757	47,713	54,635
17	300	Nicole Toscano	Rows From Import	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
	$\bullet \to$	User Forecast v	with AS Compa View E	Detail 🕂	•		•
						III II -	+ 60%

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

	1		Categ	ory	3
Name 🔺		Architecture		Data Controlled By	Data Table
Actual Sale	S		~	Corporate V	
Budget			~	Corporate 🗸	
Cart Activit	,		~	Corporate 🗸	
Deductions	- Open		✓	Corporate 🗸	2
Forecast			~	Corporate 🗸	
Inventory			~	Corporate 🗸	
User Budge			~	User 🗸	mtu1transaction46
User Foreca	ist		~	Data Steward V	mtu2transaction46
User POS		Enhanced	~	Data Steward 🗸	mtu3transaction46
2	Categories for your Stra determines which source 'Standard' as Archited from corporate business For example, measures functionality, which allo 'Enhanced' as Archite general users or Data S corporate business sys or other unique data tha 'Enhanced ' categories measure data from Exce Steward design	k to open help atum environm ces of data can cture and 'Cor s systems such s from 'Corpora ws users to co ecture – This ty Steward admini tems as well as at will complem can be used w cel spreadsheet d category is se nation can impo	that is spon ent show is be used it porate' as n as Orden te' contro py Stratun vpe can ha strators. F s external tent your S with Data In ts or other et to Data ort data to	ecific to managing n this window.* The for them. Details for s Data Controlled Entry, ERP or CR led categories can n data from one me ave data controlled for these categories data sources such Stratum data. For e nport functionality, sources of data. Steward , only Sec that category.	eir status in this window llow. By – This type of data is typically M and is usually controlled by IT. be used with Data Copy easure to another measure. by the user community, either by s, users can import data from as demographics, housing trends, xample, measures from which allows users to import
	import data to t Data Table – This colu	hat category. mn is only pop mn shows the	ulated with name of a	n information when fact table that is s	ess to using Data Import can a category has been designated becific to that category and its r database.

	*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

			Data Imp	ort Information				×
Template	Catego	ory					User	POS
Name:	For Point	of Sales imports						
Description:	Mapped fo	or amount and un	its measures					
Туре:	Global				~			
		Category Data B	efore Import Continue Processing	4				
Configuration:	Allow :	Schema Drift And	Continue Processing					
Source Of Data For I Source Type: Target Category: Format: Header Rows In File	E U T	ocal File xcel Iser POS ransactions						Î
Mapping:								
Date		Dimension	Dimension	Ignore	Measure	Measure		
yyyy-mm-dd (2012-	03-01)	Ship-To Region	Ship-To Territory		User POS Amt 3	User POS Unit 3		
Days		Ship-To Region	Ship-To Territory	STerr Long Description	User POS Amt 4	User POS Unit 4		
Owner:	Karen Shy	/pe						
Last Updated Date:	9/3/2024	4:52:24 PM						
Last Updated By:	Karen Shy	pe	2					
Created Date:	9/3/2024	4:52:24 PM						
Last Used Date:	9/3/2024	4:52:27 PM						
Last Used By:	Karen Shy	pe						
			OK				Help	

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	Source	
Product Group User Controlled PGrp Sales Division	None	-
Product SubClass	None	
Product Type	None	
Product Type Short Description	None	
Region	None	
RepBroker	None	
Rep Broker State	None	
RepBroker Type	None	
Sales Director	None	
Sales Director Town	None	
Ship-To Market	None	
Ship-To Market City	None	
Ship-To Region	Import File	
Ship-To Territory	Import File	
Ship-To Territory Sales Mngr	Always sourced from a Ship-To Territory Attribute	
UPC Global Number	None	
UPC Global Number ABC Class	None	
UPC Global Number User Controlled - UPC Category	None	
UPC Global Number User Controlled - UPC Lead Ti	None	
UPC Global Number User Controlled UPC Market P	None	
UPC Global Number User Controlled 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
	Import File
Rep Broker State	Always sourced from a RepBroker Attribute
Rep Broker State RepBroker Type	
Rep Broker State RepBroker Type	Always sourced from a RepBroker Attribute
Rep Broker State RepBroker Type	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute
Rep Broker State RepBroker Type Sales Director Sales Director Town	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File
Rep Broker State RepBroker Type Sales Director Sales Director Town	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File Always sourced from a Sales Director Attribute
Rep Broker State RepBroker Type Sales Director Sales Director Town Ship-To Market Ship-To Market City	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File Always sourced from a Sales Director Attribute None
Rep Broker State RepBroker Type Sales Director Sales Director Town Ship-To Market Ship-To Market City Ship-To Region	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File Always sourced from a Sales Director Attribute None None
Rep Broker State RepBroker Type Sales Director Sales Director Town Ship-To Market Ship-To Market City Ship-To Region	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File Always sourced from a Sales Director Attribute None None None
RepBroker Type Sales Director Sales Director Town Ship-To Market Ship-To Market City Ship-To Region Ship-To Territory	Always sourced from a RepBroker Attribute Always sourced from a RepBroker Attribute Import File Always sourced from a Sales Director Attribute None None None None

Data Import List Window

+	001	Da	ita Import				
Category User Forecast User POS User Budget User Forecast User Budget 1 to 6 of 6	Description Adding Data For Forecasting Work Various Holiday or Other Pop-up Event Sales 2024 Budget Data by Product I ↓ ↓ ↓ ↓	Submitted By Karen Shype Karen Shype Ramdas Jackson Mary Leonard Karen Shype	Submitted 09/06/2024 11:32:32 09/05/2024 16:59:14 08/15/2024 15:51:27 07/29/2024 12:23:19 10/10/2019 12:38:39 09/09/2024 10:58:52	Completed ▼ 09/06/2024 11:32:43 09/05/2024 17:00:45 08/15/2024 15:51:28 07/29/2024 12:23:36 10/10/2019 12:38:47	Status Completed Completed Error Completed Completed In Process	File/Table Name Import Source Monthly Forec Holiday Period Coupon Popup Daily ShipToRegionTerritory 1 Forecast Pro Output- Transac Forecast Pro Output - Transa Data For Budget Imports 202	
1	 New - Click to set See Processing Details For A Data Im Details For A Data Im Details For A Data Im Cords such as its primpacted by the delet Help - Click to op 	ails For A Da hary of all prop port. a Data Import occessing report e.	ta Import	port. See also <u>R</u> e Delete button t load file. The im	o delete ported da	ocessing its applicable	
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		
	?				
For Importing	mports Sales Data Imports g Budget Data I∢ ∢ 1 ▶ ▶I	Description For importing specialty forecasts Bring in seasonal Point of Sales data Bring in data for budgeting analysis	Category User Forecast User POS User Budget	Owner Karen Shype Karen Shype Ramdas Jackson	Last Used 09/09/2024 11:25:14 08/09/2024 14:01:04 07/29/2024 12:23:00
1	• Delete data for	- Click to set up a new template. - Select a template and then c which the template was used is no - Click to open help that is speci	lick the Delete b ot impacted by th	ne delete.	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		
Туре:	Global				~
3	Delet	e Category Da	ata Before Import		
	Allow	Schema Drift	: And Continue Processing		
Configuration:					
Source Of Data For		Local File	_		
Source Type:		Excel	5		
Target Category:		User Budget			
Format:		Transactions			
Header Rows In File Transaction Date Fo		1	(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.

	1	Data Import - Template Selection		×	
		d with the source you selected. Please selec any of these Templates, please select "None			
Name .		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		×
		natch the Category that will be selected for import. If you do not want to use any of the	your import source		
	Name 🔺	Description	Owner	Last Used Date	Categ
	For Point of Sales imports	Mapped for amount and units meas	ures Karen Sh	hype 9/3/2024 4:52:27 Pt	M User
1	Point of Sales Data Imports None	Bring in seasonal Point of Sales dat			
		Process Preview	Cancel		•
1	The descriptive text at the to match for an import you've s	p of the window gives you inform tarted to set up.	mation about	why the template(s) ar	re a
		the import source selected for th) shown in the window	ne current imp	oort 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 wh	nat the
2 and		for your import are listed in the pping for you or choose not to u			
3	displays with the sel	and click Preview to review the a ected template's details applied scription and process the impor	I to the import		

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>
- <u>Mapping Window Template Used</u>

Mapping Window – No Template Used

	•		Data Mapping - D	ata Import			
000	01						
	U						
Jse the Configura	tion option	is and Mapping preview to	tell us how to treat data for the	e import.			
				4	_		
Description: Option	nally enter a	description for this import		Con	figuration 🛛 Delete Ca	tegory Data Before	Impo
Click Process to im	port your da	ata or click Add Template first	to save mapping for future use.	Add Template			
	. ,	· ·			-		
Date	•	Dimension	▼ Ignore ▼	Measure	Measure	T	
dd-mmm-yy	•	Product	•	User Budget Amt 2	User Budget Unit 2	•	
Weeks		Product	Prod Long Description	Expected Sales Amount	Expected Sales U	nits 🛛 😗	
	29-Dec-24	621A954011	Baby Carrots 1A	\$11	1,402	265	'
	29-Dec-24	621B954011	Baby Carrots 1B	\$22	2,804	530	
	29-Dec-24	621C954011	Baby Carrots 1C	\$12	2,542	291	
	20 Doc 24	6210064011	Paby Carrots 1D	¢13	2,602	210	
	29-Dec-24	621E954011	Baby Carrots 1E	\$14	4,823	344	
	29-Dec-24	621F954011	Baby Carrots 1F	\$15	5,963	371	
	29-Dec-24	621G954011	Baby Carrots 1G	\$17	7,103	397	
	29-Dec-24	621H954011	Baby Carrots 1H	\$18	8,243	424	
	29-Dec-24	621I954011	Baby Carrots 1I	\$19	9,384	450	
	29-Dec-24	621J954011	Baby Carrots 1J	\$20	0,524	477	
	29-Dec-24	621K954011	Baby Carrots 1K	\$11	1,402	265	
	29-Dec-24	623A954011	Baby Carrots 3A	\$11	1,211	298	
	29-Dec-24	623B954011	Baby Carrots 3B	\$22	2,421	596	
	29-Dec-24	623C954011	Baby Carrots 3C	\$12	2,332	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.

	anally provide a d							
imports.	onally provide a d	escription for the im	port, which helps you	distinguish it from othe				
Configuration – Click to access the <u>Import Configuration window</u> . From there, you can edit basic properties that tell Viewer about your import source and the Target category for the import.								
new data is importe	ed. Select this opti be cleared before	ion if you want to ha		egory import before the m ALL measures of th d, imported data is				
reused again when	processing impor	ts for the same cate	mapping details as a ^s egory. See also <u>Add A</u> ite will use the templat	Data Import Template				
 drop-down lists in the Stratum.Viewer whany to ignore. Row are the header row Note: Header rows <u>example, the heade</u> This example show the mapping windo mapping may be do	he first two rows a at's in each colum (s) highlighted in g s in the import sou contain descriptiver rows contain dir vs a progression o w. Note that as yo one for you autom	are for use in mappin on, what to do with the green are the start of urce (through a prop we details that aid you mension names, de f identifying what's in ou continue to do im	ng import data to Strat he data during the imp of you import file and a perty in <u>Import Configu</u> ou in mapping but do r <u>scriptions</u> , and measu in your import source u ports in Viewer after y	oort, and what columns re what you told Viewe <u>iration</u>). not get imported. For re names. using drop-down lists in				
	-	elections if needed.		d about your prior impo				
First, the preview h	as no mapping pr	elections if needed.	et. All columns defaulte	d about your prior impo ed to Ignore. By defaul				
First, the preview h Data Import assum	as no mapping pr es that the import	elections if needed. operties selected ye file has one header	et. All columns defaulte r row.	d about your prior impo ed to Ignore. By defaul				
First, the preview h	as no mapping pr	elections if needed. operties selected ye	et. All columns defaulte	d about your prior impo				
First, the preview h Data Import assum	as no mapping pr es that the import	elections if needed. operties selected ye file has one header	et. All columns defaulte r row.	d about your prior impo ed to Ignore. By defaul Ignore				
First, the preview h Data Import assum Ignore	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected ye file has one header	et. All columns defaulte r row.	d about your prior impo ed to Ignore. By defaul Ignore v Budget Budget Amount Working				
First, the preview h Data Import assum Ignore v Date 2017-01-31 2017-01-31	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected ye file has one header Ignore Ignore Contemposities Contemposities Ignore Contemposities Ignore Contemposities Ignore Ignore Ignore Ignore Ign	et. All columns defaulte r row. Ignore V Budget Budget Amount Frozen \$47,360,467 \$272,470,774	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845				
First, the preview h Data Import assum Ignore v Date 2017-01-31 2017-01-31 2017-01-31	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected ye file has one header Ignore Ignore Contemporate Long Description Down Fresh Vegetables Contemporate Con	All columns defaulter row. Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,039,725	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,459,532				
First, the preview h Data Import assum Ignore V Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected yet file has one header Ignore Ignore PCat Long Description 200 Fresh Vegetables 201 [canned Fruit 202 Pork 203 Beef	et. All columns defaulter r row. Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,039,725 \$17,206,955	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,459,532 \$21,670,131				
First, the preview h Data Import assum Ignore ▼ Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected yes file has one header Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef 204 Fresh Fruit	Ignore Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,206,955 \$28,605,895	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,670,131 \$36,025,756				
First, the preview h Data Import assum Ignore V Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31	as no mapping pr es that the import Ignore Product Category	elections if needed. operties selected yet file has one header Ignore Ignore PCat Long Description 200 Fresh Vegetables 201 [canned Fruit 202 Pork 203 Beef	et. All columns defaulte r row. Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,039,725 \$17,206,955 \$28,605,895 \$12,272,692	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,670,131 \$36,025,756				
First, the preview h Data Import assum Ignore V 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	as no mapping pr es that the import Ignore Product Category	Plections if needed. Operties selected yes file has one header Ignore PCat Long Description PCat Long Descrip	et. All columns defaulte r row. Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,039,725 \$17,206,955 \$28,605,895 \$12,272,692	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,459,532 \$21,670,131 \$36,025,756 \$15,456,010				
First, the preview h Data Import assum Ignore V 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 Drop-down lists at f • First colum	as no mapping pr es that the import Ignore Product Category the top were used n contains Date in	elections if needed. operties selected yes file has one header Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef 204 Fresh Fruit 207 Frozen Fruit Products to identify what's in for and the user specified	et. All columns defaulter r row. Ignore Budget Budget Amount Frozen \$47,360,467 \$272,470,774 \$17,206,955 \$17,206,955 \$12,272,692 n each column. ecified the date format	d about your prior impo ed to Ignore. By defaul Ignore Budget Budget Amount Working \$59,644,930 \$343,144,845 \$21,459,532 \$21,670,131 \$36,025,756 \$15,456,010				

Date	▼ Dimension	▼ Ignore	•	Measure 🗸 🗸	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		\$47,360,46	7 \$5
2017-01-31	Product	d Fruit		\$272,470,77	4 \$34
2017-01-31	Product ABC Class			\$17,039,72	9 \$2
2017-01-31	Product Commodity Code			\$17,206,95	3 \$2
2017-01-31	Product Primary Buyer	Fruit		\$28,605,89	5 \$3
2017-01-31	Product Primary Planner	1 Fruit Products		\$12,272,69	2 \$1
2017-01-31	Product Purchasing UM	Prepared Dinners		\$20,212,28	D \$2
2017-02-28	Product Brand	Vegetables		\$39,632,49	1 \$4
2017-02-28		d Fruit		\$171,912,55	B \$21
2017-02-28	Product Category			\$13,720,37	7 \$1
2017-02-28	Product Category Role			\$14,225,64	5 \$1
2017-02-28	Product Class	Fruit		\$24,196,49	2 \$3
2017-02-28	Product Family	1 Fruit Products		\$9,622,24	9 \$1
2017-02-28	Product Group	1 Prepared Dinners		\$18,070,00	2 \$2
2017-03-31	Product SubClass	Vegetables		\$51,079,26	5 \$6
2017-03-31	Product Type	d Fruit		\$259,180,73	3 \$32
2017-03-31	Product Type Short Descrip	ption _		\$17,599,73	1 \$2
2017-03-31	Perion		sed	\$17,733,77	D \$2
²⁰¹⁷⁻⁰³⁻³¹ The Target d	Product Type Short Descrip Penion rop-down list under each nported data. The mapp ▼ Dimension	Measures are us	sed nd t	\$17,733,77 to choose the target he user can process	stratum measure the import.
²⁰¹⁷⁻⁰³⁻³¹ The Target d receive the ir	rop-down list under each nported data. The mapp	n Measures are us ing is complete, a	nd t	\$17,733,77 to choose the target he user can process	stratum measure the import.
2017-03-31 The Target d receive the ir Date	rop-down list under each nported data. The mapp ▼ Dimension	n Measures are us ing is complete, a ▼ Ignore	nd t	\$17,733,77 to choose the target he user can process Measure	Stratum measure the import.
2017-03-31 The Target d receive the ir Date YYYY-MM-DD	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	n Measures are us ing is complete, a ▼ Ignore	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1	Stratum measure the import. Measure - Select a Target - User POS Amt 1
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	n Measures are us ing is complete, a ▼ Ignore ▼ PCat Long Description	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer	Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	 Measures are us ing is complete, a Ignore PCat Long Description 200 Fresh Vegetables 	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer \$47,360,4	Stratum measure the import. Measure - Select a Target - User POS Amt 1 20 User POS Amt 2 User POS Amt 3
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	Measures are using is complete, a Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7	Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Amt 4
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	Measures are us ing is complete, a Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7 \$17,039,7	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
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	Measures are us ing is complete, a Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef	nd t	\$17,733,77 to choose the target he user can process User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7 \$17,039,7 \$17,05,9	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 1 User POS Unit 2
2017-03-31 The Target d receive the ir Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	Measures are using is complete, a Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef 204 Fresh Fruit	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7 \$17,039,7 \$17,206,9 \$28,605,8	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 1 User POS Unit 2 User POS Unit 3
2017-03-31 The Target d receive the ir Date YYYY-MM-DD Date 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31 2017-01-31	rop-down list under each nported data. The mapp ▼ Dimension ♥ Product Category Product Category	Measures are us ing is complete, a Ignore PCat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef 204 Fresh Fruit 207 Frozen Fruit Products	nd t	\$17,733,77 to choose the target he user can process User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7 \$17,039,7 \$17,206,9 \$28,605,8 \$28,605,8 \$28,605,8 \$12,272,6	Stratum measure the import. Measure Select a Target - User POS Amt 1 User POS Amt 2 User POS Amt 3 User POS Unit 1 User POS Unit 1 User POS Unit 2 User POS Unit 3 User POS Unit 3 User POS Unit 4
2017-03-31 The Target d receive the ir 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	Product Category Product Category	Measures are us ing is complete, a Ignore Pcat Long Description 200 Fresh Vegetables 201 Canned Fruit 202 Pork 203 Beef 204 Fresh Fruit 207 Frozen Fruit Products 208 Frozen Prepared Dinners	nd t	\$17,733,77 to choose the target he user can process Measure User POS Amt 1 Budget Budget Amount Frozer \$47,360,4 \$272,470,7 \$17,039,7 \$17,069,9 \$28,605,8 \$12,272,6 \$28,605,8 \$22,212,2	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 1 User POS Unit 2 User POS Unit 2 User POS Unit 3 User POS Unit 3 User POS Unit 4

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 Ma	appin	g - Data Imp	ort			
0000								
						-		
This preview shows your sele	ected Template and	I how data will be treated for t	the impo	rt.		1		
Description: Optionally enter a	description for this is	moort		[sing Template: Import Bu	idaat Undatas	
Description. Optionally enter a	description for this h				rou are us	sing template: import bu	luger opuares	
Date 🔻	Dimension	▼ Ignore	•	Measure	•	Measure	•	
dd-mmm-yy (01-Mar-12)	Product	•	T	User Budget Amt 2	•	User Budget Unit 2	•	
Date	Product	Prod Long Description	on	Expected Sales Amo	unt	Expected Sales Units		
29-Dec-24	621A954011	Baby Carrots 1A			\$11,402		265	
29-Dec-24	621B954011	Baby Carrots 1B			\$22,804		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		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		450	
29-Dec-24	621J954011	Baby Carrots 1J			\$20,524		477	
29-Dec-24	621K954011	Baby Carrots 1K			\$11,402		265	
	623A954011	Baby Carrots 3A			\$11,211		298	
	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	x
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.

C Open						×
$\leftarrow \rightarrow \vee \uparrow$.			v ت	Search KEF		P
Organize New folder					•	?
Attachments	^ Name				Date modified	
Desktop	D	ata For Budget Imports 2025			9/4/2024 10:28	AN
Documents	10.00	and the first state into the state of				
📜 Email attachments						
📕 Karen						
Pictures						
Recordings						
Shared with Everyone						
📓 Silvon Software, Inc						
🤜 This PC						
Intwork						•
	~ <					>
File name: Data For Bud	get Imports 2025		~	Custom files		~
		I	Upload from mobile	Open	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	×
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	x
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	ļ
Gl	lobal Home Page:		
R	Registration Keys:	Stratum.Viewer	
	3		ļ
		Stratum Access Hub	1
		Stratum Analyst Hub	1
		Stratum Cloud Import	
	unter an Alexandra		j I
CL	ustomer Number: Customer Type:	Hosted	
	customer typer		
	Toolbar -		
	• Sav	e 🗔 - Click to save changes to system configuration.	
	• Hel	p 🖤 - Click to open help that is specific to working with system configuration.	
2	Name - Use and tab.	this field to customize the name that displays for the application in the browser title bar	
	home page	ne 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.	
		this field blank, the application home page defaults to a Stratum home page that has tum.Viewer videos and other resources.	
		dministrators can define different home pages for particular users or user groups ings in the User Profile or User Profile Group windows.	
3	specialized	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	itum.Viewer	
		tum Access Hub, which includes the Stratum Broadcast Manager plus Excel exporting Stratum Power BI Connector functionality.	
		itum 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 Ser	ver: Override Log File Location For Broadcast Process (specify new location below)
2 Data Impo	Prts: Master Data Import Upload File Location Data Import Upload File Location
used to the proc	e Log File Location For Broadcast Process – This Broadcast Server property can be customize where log files from Broadcast Server processing are stored. The logs are from essing of broadcast schedules, broadcast groups, and actions. By default, logs are stored .ogs\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			
for	r Stratum	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.	
im the	iports from e appropri	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 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:	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 Ma	pping	j - Data Impo	rt				
0000										
Use the Configuration optic	ons and Mapping preview to t	ell us how to treat data for th	ie import.							
Description: Optionally enter	r a description for this import		C	onfigurat	tion 🛛 Delete Categor	y Data Be	fore Import			
Click Process to import your	data or click Add Template first t	o save mapping for future use.	Add Template							
Date	Dimension	Dimension	▼ (gnore	•	Dimension	•	Ignore	Measure	•	Measure 🔻
yyyy-mm-dd (2012-03-01)	Distribution Center Ware	Distribution Channel	v]	•	Product Brand	•		User POS Amt 1	v (Jser POS Unit 1
Date	Distribution Center Wareho	use Distribution Channel	DsChn Long Descrip	tion	Product Brand		PBrnd Long Description	Sales Amount	S	ales Units
2023-12-29		19 DIR	Direct			001	Тір Тор	\$1,1	.08,906	15,532
2023-12-29		19 DIR	Direct			002	Dew Drop	\$1	21,542	4,490
2023-12-29		19 DIR	Direct			003	SuperSweet	\$3	75,370	9,346
2023-12-29		19 DIR	Direct			005	Farm Crisp	\$1	.88,173	4,398
2023-12-29		19 DIR	Direct			008	Bing-a-ling	\$2	46,280	3,665
2023-12-29		19 DIR	Direct			009	Farm Fresh	\$4	31,418	8,293
2023-12-29		19 DIR	Direct			010	Prime Grown	\$2	38,915	3,894
2023-12-29		19 DIR	Direct			012	Home Cookin'	\$8	23,041	9,576
2023-12-29		19 DIR	Direct			999	Private Label	\$3	92,464	7,697
2023-12-29		19 INB	Indirect - Broker			001	Тір Тор	\$5	36,775	7,376
2023-12-29		19 INB	Indirect - Broker			002	Dew Drop	\$8	01,359	13,607
2023-12-29		19 INB	Indirect - Broker			003	SuperSweet	\$1	76,391	4,353
2023-12-29		19 INB	Indirect - Broker			004	Idaho Delight	\$5	32,004	14,478
2023-12-29		19 INB	Indirect - Broker			006	Southern Sweet	\$4	79,862	7,835
2023-12-29		19 INB	Indirect - Broker			009	Farm Fresh	\$4.7	84 709	70.786

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 V	Dimensio				
yyyy-mm-dd (2012-03-01)	■ Distribution Center Ware ■	Distributi				
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	TNID				

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 Mai	nning - Data Im	nort
	Data Import - Template Selection		×
	e Category that will be selected for your import source. Plea If you do not want to use any of these Templates, please se		
Name 🔺	Description	Owner	Last Us
Point of Sales Data, Amounts and Units	Data for POS by Territory	Karen Sharpey	
U Weekly Point of Sales Data	Data provided by regional retailers	Donna Farris	5/4/20
	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.

Date 🔻	Dimension	▼	Dimension V	Ignore	•	Measure 🗸 🗸	Measure V
yyyy-mm-dd (2012-03-01) 🔻	Ship-To Region	Ŧ	Ship-To Territory		•	User POS Amt 4	User POS Unit 4
Days	Ship-To Region		Ship-To Territory	STerr Long Descrip	otion	User POS Amt 4	User POS Unit 4
2023-01-03		50	110	4 New England		15781.52774	4 3983.57996
2023-01-03		50	110	5 Great Lakes		1605.099	456.91162
2023-01-03		51	110	2 Gulf Coast		2956.05974	1276.89263
2023-01-03		51	110	3 Midlantic		7347.29324	1987.53808
2023-01-03		52	110	1 South Central		10326.19418	3 2537.59532
2023-01-03		52	110	6 Great Plains		7382.3599	7 1992.38091
2023-01-03		53	110	0 Southwest		6714.50692	2 1600.03024
2023-01-03		53	110	7 Northwest		3508.27814	1604.05577
2023-01-03		54	111	1 Eastern Atlantic Provi	inces	10741.56612	7 2593.94681
2023-01-03		55	110	8 Western Provinces		4009.6088	5 1754.64454
2023-01-03		55	110	9 Central Provinces		7197.5085	1882.43146
2023-01-13		50	110	4 New England		15781.52774	3983.57996
2023-01-13		50	110	5 Great Lakes		1605.099	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.

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.					Click the Configurat han what's provided		preview lists.		
		ок			Ignore	T	Preview of r	rows 1 - 10	0
vvvv-mm-dd	RepBroker	Distribution thannel	Customer Sold-To	1		V	User POS Unit 1		
Weeks	RepBroker	Distribution hannel	Customer Sold-To		SIdTo Long Description		Units 1		i.
2019-01-06		300 INB		1501	00 WILDER FOODS EASTERN	AMERIC		554,368	
2019-01-06		300 INB		1501	10 Wilder Foods Western Ame	eric		502,875	
2019-01-06		301 INW		1502	50 Prestwick Brothers				
2019-01-06		302 INW		1502	40 Olivieri Distributors			103,740	
2019-01-06		302 INW		1502	80 New York Foods			30,812	
2019-01-06		302 INW		1503	00 Auburn Providers			20,723	
2019-01-06		303 INW		1503	50 Chicago's Finest			34,203	
2019-01-06		303 INW		1503	80 Packingham Foods			21,267	
2019-01-06		304 INW		1502	60 Dallas Food Services			35,250	
2019-01-06		304 INW		1503	70 Southwest Foods			28,719	
2019-01-06		305 INB		1501	50 Harrington's Eastern			222,467	
2019-01-06		305 INB		1501	60 Harrington's Western			99,805	
2019-01-06		306 INW		1503	10 Maple Tree Foods			26,458	
2019-01-06		306 INW			22			17,413	
2019-01-06		306 INW		1503	20 Quebec Foods			24,951	
2019-01-06		306 INW		1503	40 Alberta Foods			7,954	
2019-01-06		307 INW		1503	90 Pacific Providers			13,564	
2019-01-06		308 INW			30 Penn Brands			46,972	
2010-01-06		200 INIM		1501	40 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 V	Dimension V	Ignore 🔻	Measure
•	Distribution Channel	Customer Sold-To	•	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		Alberta Foods	
307	INW	150390	Pacific Providers	
308	INW	150230	Penn Brands	

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

Auto	Save Off	8 9 · C	÷ ₩e	ekly Data To Import By Brok	er Customer ShipTo.xlsx - Excel		<u></u> <u>–</u>	
File	Home	Insert Page I	ayout Formulas Data	Review View Add	-ins Help PDF ACROBAT Team	✓ Tell me	🖻 Share	Comments
A37		× ✓	fx 2019-01-13					
A37	*		Jx 2019-01-13					*
	А	В	С	D	E	F	G	H
1	Weeks	RepBroker	Distribution Channel	Customer Sold-To	SIdTo Long Description	Units 1	Units 2	Returns
2 20	19-01-06	300	INB	150100	WILDER FOODS EASTERN AMERIC	554,368	8,712,683	(42440)
3 20	19-01-06	300	INB	150110	Wilder Foods Western Americ	502,875	7,681,556	(32380)
4 20	19-01-06	301	INW	150250	Prestwick Brothers	35,920	552,802	(23497)
5 20	19-01-06	302	INW	150240	Olivieri Distributors	103,740	2,076,393	(78740)
6 20	19-01-06	302	INW	150280	New York Foods	30,812	508,597	(1020)
7 20	19-01-06	302	INW	150300	Auburn Providers	20,723	442,977	(2946)
8 20	19-01-06	303	INW	150350	Chicago's Finest	34,203	466,698	(10876)
9 20	19-01-06	303	INW	150380	Packingham Foods	21,267	325,616	(2243)
10 20	19-01-06	304	INW	150260	Dallas Food Services	35,250	803,035	(1495)
11 20	19-01-06	304	INW	150370	Southwest Foods	28,719	343,044	(5280)
12 20	19-01-06	305	INB	150150	Harrington's Eastern	222,467	1,658,173	(12213)
13 20	19-01-06	305	INB	150160	Harrington's Western	99,805	787,213	(7885)
14 20	19-01-06	306	INW	150310	Maple Tree Foods	26,458	423,296	(884)
15 20	19-01-06	306	INW	150322		17,413	285,004	(408)
16 20	19-01-06	306	INVV	150320	Quebec Foods	24,951	306,117	
17 20	19-01-06	306	INW	150340	Alberta Foods	7,954	58,939	
18 20	19-01-06	307	INW	150390	Pacific Providers	13,564	140,486	(952)
19 20	19-01-06	308	INW	150230	Penn Brands	46,972	665,734	(8701)
20 20	19-01-06	309	INW	150140	Midwest Providers	42,157	922,597	(62765)
21 20	19-01-06	312	DIR	150120	Sumpter Dist'n Eastern Divi	153,265	2,774,653	(45091)
22 20	19-01-06	312	DIR	150130	SUMPTER DIST'N WESTERN DIVI	88,878	1,631,267	(78468)
23 20	19-01-06	313	INB	150170	GOODFOODS EASTERN	102,023	886,938	(41670)
24 20	10 01 06	212 khi Data Ta Imu		150190	GoodEoode Western	155 350	1 210 095	(32244)
4 1	vvee	kly Data To Im	port (+)		4	_		•
					Average: 248094.9834 Count: 8 Sum: 744284.950	2 🔛 🗉	□	+ 90%

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	P n options and Mapping preview	v to tell us how to treat dat		oing - D	ata Import		
	ly enter a description for this impo rt your data or click Add Template (re use. Add Template	Configur	ation Delete Catego	ory Data	Before Import
Date	▼ Dimension	▼ Dimension	▼ Ignore	•	Dimension	•	Ignore
yyyy-mm-dd Days	Distribution Channel Distribution Channel	Product Class Product Class	Description	•	Product Category Product Category	T	Description
2019-01-03	DIR	B	Branded		Product Category	200	Fresh Vegetables
2019-01-03	DIR	B	Branded				Canned Fruit
2019-01-03	DIR	B	Branded				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 Din
2019-01-03	DIR	0	Other			200	Fresh Vegetables

D	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.

AutoSave Off	Holida	day Period Coupon Popup Events • Saved to this PC \sim ρ – \Box \times
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E34 ~ : >	$< \checkmark f_x \checkmark$	^
A 1	Data Import Processing	B C A
2	Data Import Processing	
3 Source of Data For Ir	nport: Local File	
4 Source Name	Holiday Period Coupon Po	nnun Events 2024 ylsy
5 Description:	Various Holiday or Other P	
6 Process Mode:	User Interface	
7		
8 Data Import Status:	Completed	
9 Owner:	Karen Shype	
10 Submitted:	09/05/2024 16:59:14	Selections You
11 Completed:	09/05/2024 17:00:45	
12		Made In Import
13 Template:		Configuration
14		Window
15 Import Configuration		
16 Delete Data Before Im		
17 Target Category:	User POS	
18 Format: 19 Header Rows In File:	Transaction	
19 Header Rows In File: 20	1	
21 Processing Details:		Summary Of
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	
< > Dat	ta Import Detail +	
	ibility: Good to go	

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.

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E34 ~ : × ✓	$f_X \sim$					^
4/ Completed Date:	09/05/2024 17:00:45	В			С	
49 Data Mapping:						
50 Caption:	Dates					
51 Type	Date					
52 Target	yyyy-mm-dd (2012-03-01)	Colortions Very Mode				
53 Caption:	Distribution Center Warehouse	Selections You Made				
54 Type	Dimension	In Data Mapping				
5 Target	Distribution Center Warehouse	Window For Each				
6 Caption:	Distribution Channel	Import Column				
57 Type	Dimension					
58 Target	Distribution Channel					
59 Caption:	Product Brand					
60 Type	Dimension					
61 Target	Product Brand					
62 Caption:	Sales Amount					
63 Type	Measure					
64 Target	User POS Amt 1					
65 Caption:	Sales Units					
б Туре	Measure					
67 Target	User POS Unit 1					-
< > Data Impo	ort Detail +	E 4 🖷				Þ
Ready 💽 🎲 Accessibility: Go	ood to go			<u> </u>		0%

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.

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73 Target	weasure User POS Amt 4	Total Rows Imported			С	•
75 Number of Rows Imported:	2513					
76 77 Target Dimensions:	Mapped					
78 ABC Classification Code	None					_
79 Accounting Group	None	Dimensions In				_
80 Account Group Long	None None None	Dimensions In Target Category				-
	None					-
80 Account Group Long 81 Buyer	None None		J			
80 Account Group Long 8 81 Buyer 8 82 Commodity Code 8 83 Company 8 84 Currency 8	None None None None None		J			
80 Account Group Long 81 Buyer 82 Commodity Code 83 Company 84 Currency 85 Customer Class	None None None None None None					
80 Account Group Long 81 Buyer 82 Commodity Code 83 Company 84 Currency 85 Customer Class 86 Customer Parent	None None None None None None None					
80 Account Group Long 81 Buyer 82 Commodity Code 83 Company 84 Currency 85 Customer Class 86 Customer Parent	None None None None None None		: •			•

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).

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E34 ~ : × ✓	$f_{X} \sim$	^
90 Gustomer Friority Oser	В	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	
99 Distribution Center	Import File	
Distribution Center	Always sourced from a Distribution Center Warehouse Attribute	
100 Warehouse State 101 Distribution Channel	Import File	
102 Division	Nepo	
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 Drimany Dlannor	Nono	•
< > Data Imp	ort Detail + : •	Þ
Ready 🐻 🎌 Accessibility: Go	bod to go III III III	+ 70%

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.

				Dat	a Mapping - Data I	Import					
Description:	See How Dimensions Will Be Impacted By The Import Description: Adding Data For Forecasti Lick Process to import your data or click Add Template first to save mapping for future use. Add Template										
Date	T	Dimensior	n 🔻 Dimension	n v	Dimension V	Dimension 🔹	Measure 🔻	Measure V			
yyyy-mm-dd	(2012-03-01) 🔻	Region	▼ RepBroke	. .	Product Group	Product Brand	User Forecast Unit 2	User Forecast Unit 1			
Date	. ,	Region	RepBroke	r	Product Group	Product Brand	Units 2 For Forecasting	Units 1 For Forecasting			
2024-01-01			330	313	10	008	17,593	13,661			
2024-01-01			330	313	10	002	23,091	17,930			
2024-01-01			330	313	10	005	27,764	21,558			
2024-01			330	313	10	004	14,340	11,135			
2024-01-			330	313	10	999	87,142	67,664			
2024-01-	Mappe	d	330	313	10	006	22,267	17,289			
2024-01-	Dimensi	ons	330	313	10	007	20,296	15,760			
2024-01-	Dimensi	UIIS	330	313	10	003	41,509	32,231			
2024-01-			330	313	10	001	30,926	24,013			
2024-01-01			330	305	10	008	32,850	25,507			
2024-01-01			330	305	10	002	59,698	46,354			
2024-01-01			330	305	10	005	18,372	14,266			
2024-01-01			330	305	10	004	33,171	25,756			
2024-01-01			330	305	10	999	48,657	37,781			
2024-01-01			330	305	10	006	22,541	17,503			
2024-01-01			330	305	10	007	14,157	10,993			
2024-01-01			330	305	10	003	23 137	17 965			

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.

D	ata Import Information	×			
Category		User Forecast			
Dimension	Source				
Product Brand	Import File	^	y Data	Before Import	
Product Category	None				
Product Category Role	None		_	_	
Product Class	None			Measure 🔻	Measure
Product Class User Controlled PClas Department	None		-	User Forecast Unit 2	User Forecast Unit 1
Product Class User Controlled PClas Promotion Code	None			5	Units 1 For Forecasting
Product Family	None		008		
Product Group	Import File		002		
Product Group User Controlled PGrp Marketing Code	Always sourced from a Product Group Attribute		005		
Product Group User Controlled PGrp Sales Division	Always sourced from a Product Group Attribute		004 999		
Product SubClass	None		006		
Product Type	None				
Product Type Short Description	None		003		
Region	Import File		001		
RepBroker	Import File		008	32,850	2
Rep Broker State	Always sourced from a RepBroker Attribute		002	59,698	4
RepBroker Type	Always sourced from a RepBroker Attribute		005		
Sales Director	Sourced from RepBroker Previous Level definition	Ŭ	004		
Sales Director Town	Always sourced from a Sales Director Attribute		999		
Ship-To Market	None		006		
Ship-To Market City	None	-			
	OK	Help			

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

				會	onthly Fore	casting Data		
	nns: +	Year: Filtered		♥ 🔯 ႃ♥		4 Map Dimens	ped	to 100 of 1548 (CO) 1 to 2 of 2 up: Filtered × :: Product E > + More Info
Year	Months	T Region	T RepBroke	r T Product Group	▼ Product Brand	User Forecast Unit 2	User Forecast Unit	1
2024	2024-01-01	330	313	10	008	17,593	13,6	61
2024	2024-01-01	330	313	10	002	23,091	17,9	30
2024	2024-01-01	330	313	10	005	27,764	21,5	58
2024	2024-01-01	330	313	10	004	14,340	11,1	35
2024	2024-01-01	330	313	10	999	87,142	67,6	64
2024	2024-01-01	330	313	<u>10</u>	006	22,267	17,2	189
2024	2024-01-01	330	313	<u>10</u>	007	20,296	15,7	60
2024	2024-01-01	330	313	10	003	41,509	32,2	31
2024	2024-01-01	330	<u>313</u>	<u>10</u>	001	30,926	24,0	113
2024	2024-01-01	330	305	<u>10</u>	008	32,850	25,5	i07
2024	2024-01-01	330	<u>305</u>	<u>10</u>	002	59,698	46,3	54
2024	2024-01-01	330	<u>305</u>	<u>10</u>	005	18,372	14,2	166
2024	2024-01-01	<u>330</u>	305	<u>10</u>	004	33,171	25,7	'56
2024	2024-01-01	330	305	<u>10</u>	999	48,657	37,7	'81
2024	2024-01-01	330	305	10	006	22,541	17,5	i03
2024	2024-01-01	330	305	<u>10</u>	007	14,157	10,9	93
2024	2024-01-01	<u>330</u>	305	<u>10</u>	003	23,137	17,9	965
2024	2024-01-01	330	305	10	001	30,468	23,6	57
2024	2024-01-01	330	306	10	008	10,629	8,2	53

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		
	ÐX		l dt		vious Leve			🔁 1 to 100 of 204 🛛 🕄 🖉 🖉 🖉) 1 to 2 of 2
Ro Colum	-	Year: Filtered	×	Months: All × Wi	th Mapped imension		RepBroker: Filter	red 🗙 📔 Product Group 🗙	> +
View Fil	ter: +			6					More Info
Year	Months	T Region	Sales Dir	SIDir Long Description	T RepBroker	User Forecast Unit 2	User Forecast Unit 1		1
2024	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		
2024	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		
<u>2024</u>	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		
<u>2024</u>	2024-01-01	<u>331</u>	<u>231</u>	Helen Briggs	<u>303</u>	77,841	60,442		
<u>2024</u>	2024-01-01	<u>331</u>	<u>880</u>	Steve Mentas	<u>304</u>	140,380	109,002		
<u>2024</u>	2024-01-01	<u>331</u>	<u>880</u>	Steve Mentas	<u>315</u>	131,996	102,492		
<u>2024</u>	2024-01-01	<u>331</u>	<u>880</u>	Steve Mentas	<u>318</u>	61,989	48,133		
<u>2024</u>	2024-02-01	<u>330</u>	<u>231</u>	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 Fo	recasting Dat	a	
	ws: #	Year: Filtered		■ Virtual Di Motion Of Rep				to 100 of 192 0000 1 to 2 of 2 ★ ∷RepBroker ★ ∷F > + More Info
Y Year	Months	T Region	Sales Dir	SIDir Long Description	Rep Broker State	User Forecast Unit 2	User Forecast Unit 1	<u>^</u>
<u>2024</u>	2024-01-01	<u>330</u>	<u>231</u>	Helen Briggs	<u>FL</u>	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	<u>NY</u>	284,976	221,276	
2024	2024-01-01	<u>330</u>	231	Helen Briggs	TX	182,119	141,411	
<u>2024</u>	2024-01-01	<u>330</u>	880	Steve Mentas	<u>CA</u>	284,930	221,241	
2024	2024-01-01	<u>330</u>	<u>880</u>	Steve Mentas	<u>PA</u>	74,314	57,703	
2024	2024-01-01	<u>330</u>	880	Steve Mentas	QC	394,705	306,478	
2024	2024-01-01	<u>331</u>	231	Helen Briggs	<u>AZ</u>	24,786	19,246	
2024	2024-01-01	<u>331</u>	<u>231</u>	Helen Briggs	<u>IL</u>	56,491	43,864	
<u>2024</u>	<u>2024-01-01</u>	<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>OH</u>	79,903	62,043	
2024	2024-01-01	<u>331</u>	<u>231</u>	Helen Briggs	TX	103,498	80,364	
2024	2024-01-01	<u>331</u>	880	Steve Mentas	<u>NB</u>	61,989	48,133	
<u>2024</u>	2024-01-01	<u>331</u>	880	Steve Mentas	<u>NC</u>	140,380	109,002	
2024	2024-01-01	<u>331</u>	<u>880</u>	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	
2024	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.

				📌 Mo	onthly Foreca	sting Data
	Ð XI			9 🖸 🍸 I	23	1 to 24 of 24 1 to 2 of 2
Ro	ws: III	Year: Filtered	d _× ∷Months:	All 🗙 📔 🗄 Region: I	Filtered 😠 📔 Ship	-To Market: All 🗴 📔 Sales Dir 🗴 🗄 Rep Broker State 🗴 🗄 Rej 💙 🕂
Colun						
View Fi						
View Fi	ter. T					More Info
Year	Months	T Region	Ship-To Market	User Forecast Unit 2	User Forecast Unit 1	
<u>2024</u>	<u>2024-01-01</u>	<u>330</u>	2	1,775,416	1,378,566	
<u>2024</u>	<u>2024-01-01</u>	<u>331</u>	2	676,886	525,585	
<u>2024</u>	2024-02-01	<u>330</u>	2			
<u>2024</u>	<u>2024-02-01</u>	<u>331</u>	2	Dime	ension Where	
<u>2024</u>	<u>2024-03-01</u>	<u>330</u>	2	Data	Was Placed	
<u>2024</u>	<u>2024-03-01</u>	<u>331</u>	2	ln D	efault Value	
<u>2024</u>	<u>2024-04-01</u>	<u>330</u>	<u>?</u>			
<u>2024</u>	<u>2024-04-01</u>	<u>331</u>	2	771,679	607,798	
<u>2024</u>	<u>2024-05-01</u>		2	2,142,265	1,643,279	
<u>2024</u>	<u>2024-05-01</u>	_	2	853,827	662,869	
<u>2024</u>	<u>2024-06-01</u>		?	2,811,820	1,818,273	
<u>2024</u>	<u>2024-06-01</u>	_	?	973,590	626,369	
<u>2024</u>	<u>2024-07-01</u>		2	2,719,821	2,111,873	
<u>2024</u>	<u>2024-07-01</u>		2	900,880	699,511	
<u>2024</u>	<u>2024-08-01</u>		<u>?</u>	2,728,755	2,515,791	
<u>2024</u>	<u>2024-08-01</u>	_	2	994,711	979,735	
<u>2024</u>	<u>2024-09-01</u>		2	2,288,097	1,829,835	
<u>2024</u>	2024-09-01		?	839,074	598,300	
2024	2024-10-01	330	?		1.100.063	· · · · · · · · · · · · · · · · · · ·

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			
300									
		i varin inan ant fi		tell us have to	+	alata dunina tha in	anaut Cliek the Con	figuration button if	
							nport. Click the Con		
layout doesn	t mat	ch the import i	ne ia	your or you wa		map to different o	data than what's pro	bylded in the previe	ew lists.
Import Option: Ad	d 🔻				V	alidate Configuration		A	
Import Option. Au	u ,				v	Configuration		U	Preview of rows 1 -
Date	-	Dimension		Dimension	-	Ignoro	Measure V	Measure 🔻	Tanara
Date	•	Dimension	•	Dimension	•	Ignore	Medsure	Measure	Ignore
yyyy-mm-dd	•	Ship-To Region	•	Ship-To Territory	•		User POS Amt 4	User POS Unit 4	
Weeks		Ship-To Region		Ship-To Territory		STerr Long Description	User POS Amt 4	User POS Unit 4	Budgeted Sales
2018-12-30			50		1104	New England	\$26,953.82	3,967	
2018-12-30			50			Great Lakes	\$3,837.75		
2018-12-30			51			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								
				tell us how to treat data				
ayout doesn't	: mate	ch the import f	ile la	yout or you want to map	to different data th	an what's provided	in the preview lists	•
							0	
Import Option: Add	۲			Validate	Configuration		Preview of ro	ws 1 -
				(1	1	1	
Dimension	•	Dimension	•	Ignore 🔻	Measure 🛛 🗸	Measure 🛛 🔻	Measure 🔻	
RepBroker		Customer Ship-To			User Forecast Unit 1	User Forecast Unit 2	User Forecast Unit 3	
Reported	•	customer omp ro	· ·	From	Sales Estimates 1	Sales Estimates 2	Sales Estimates 3	
				For Future Forecast	December	December	December	
				Date	2020-12-01	2020-12-01	2020-12-01	
RepBroker		Customer Ship-To		ShpTo Long Description	Forecast 1	Forecast 2	Forecast 3	
	312	101113		Sumpter Dist'n Buffalo NY	10,842	9,422	8,126	
	312	101107		Sumpter Dist'n Seattle WA	7,665	7,168	11,185	
	312	101112		Sumpter Dist'n - Dallas TX	11,734	6,626	7,049	
	312	101110		Sumpter Dist'n Quebec QC	11,337	10,865	12,889	
	312	101109			9,198	7,227	10,553	
	312	101107BCTH			4,470	3,947	8,560	
	312	101113BEWO		Different Measures	7,857	4,750	4,672	
	312	101108	S	elected For Each Colum	10,639	11,376	13,012	
	312	101107JCTH	۳ I		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	
	212	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 💽 🦛 🛱 🏷 - 🖓 - 🖓 - 🖓 - Import Sal	es For Future Forecasting Time Series 🖻 — 🗆 >	×
File	e Home Insert Page Layd Formulas Data F	Review View Add-ins Help PDF ACROBAT Team $$ $$ Tell me $$ $$ $$	
F84	\cdot : \times \checkmark f_x		۲
	А	В	
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		•
			96

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 measur	e can onl	to the second second second	RATUM.VIE	wer one column. Please m	ake nev		×			
1			ОК					< the Configuration b vhat's provided in the		
								Measure	Measure	
YYYY-MM-DD		Product Type		Product Category	W	Product Brand		User Budget Unit 2	User Budget Unit 2	
Date		Product Type		Product Category		Product Bran	-	Amount	Units	
2019-01-05			1		200			\$3,16	7	431
2019-01-05			1		200		002	\$3,34	5	704
2019-01-05			1		200		003	\$1,16		285
2019-01-05			1		200	•	004	\$1,27	6	
2019-01-05			1		200		999	\$3,66		764
2019-01-05			1		201			\$29,91	2	5,242
2019-01-05			1		201		011	\$18,14		3,784
2019-01-05			1		202		010	\$4,72	9	743
2019-01-05			1		203		010	\$4,18	9	731
2019-01-05			1		204		005	\$2,30		632
2019-01-05			1		204		006	\$2,46	2	677
2019-01-05			1		204		007	\$1,68	1	248
2019-01-05			1		204			\$3,26	4	466
2019-01-05			1		204		999	\$34	2	148
2010 01 05			1		207		006	¢7.97	c	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 Configura	tion		Preview of rows 1 - 100
Date	Dimension	▼ Dimension	n 🔻 Dimension	▼ Measure	•	Measure 🔻
YYYY-MM-DD	Product Type	Product C	Category 🔻 Product Br	and 🛛 🔻 User Bud	lget Unit 2 🛛 🔻	User Budget Unit 2
Date	Product Type	Product	Category Product B	rand Amount		Units
2019-01-05		1	200	001	\$3,167	431
2019-01-05		1	200	002	\$3,345	704
2019-01-05		1	200	003	\$1,165	285
2019-01-05		1	200	004	\$1,276	335
2019-01-05		1	200	999	\$3,663	764

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

			Data I	Mapping		
000						
					k the Configuration bu what's provided in the	
Import Option: Add	•		Validate	Configuration		Preview of rows 1 - 10
Date	T	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	43
2019-01-05		1	. 200	00:	\$3,345	70
2019-01-05		1	. 200	00	\$1,165	28
2019-01-05		1	. 200	004	\$1,276	33
2019-01-05		1	. 200	999	\$3,663	76
2019-01-05		1	. 201	00	\$29,912	5,24
2019-01-05		1	. 201	01	. \$18,140	3,78
2019-01-05		1	. 202	2 010	\$4,729	74
2019-01-05		1	. 203	010	\$4,189	73
2019-01-05		1	. 204	l 00!	\$2,300	63
2019-01-05		1	. 204	006	\$2.46	67

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.

			Dr each measure column must be a	a uniqi	ue combination.		Click the Config nan what's provi		in the preview	lists	
				31			Measure	W	Measure	W	
RepBroker	W	Customer Ship-To	V	w	User Forecast Unit 1	W	User Forecast Unit 1	W	User Forecast Unit 3	$\overline{\mathbf{w}}$	
			From		Sales Estimates 1		Sales Estimates 2		Sales Estimates 3		
			For Future Forecast	4	December		December		December		
			Date						2020-12-01		
RepBroker		Customer Ship-To	ShpTo Long Description		Forecast 1		Forecast 2		Forecast 3		
	312	101113	Sumpter Dist'n Buffalo NY			10,84	2	9,422		8,126	
	312	101107	Sumpter Dist'n Seattle WA			7,66	5	7,168		11,185	
	312	101112	Sumpter Dist'n - Dallas TX			11,73	4	6,626		7,049	
	312	101110	Sumpter Dist'n Quebec QC			11,33	7 1			12,889	
	312	101109	Sumpter Dist'n Winnipeg MB			9,19	8	7,227		10,553	
	312	101107BCTH	Sumpter Dist'n Seattle WA TH	В		4,47		3,947		8,560	
	312	101113BEWO	Sumpter Dist'n Buffalo NY WO	B		7,85	7	4,750		4,672	
	312	101108	Sumpter Dist'n Calgary AB			10,63	9 1	1,376		13,012	
	312	1011073CTH	Sumpter Dist'n Seattle WA TH.	J		4,02		3,552		7,704	
	312	101111	Sumpter Dist'n St. John NB			6,65		6,144		8,481	
	312	101112BCTH	Sumpter Dist'n - Dallas TX THB			8,58	8	3,143		4,044	
	312	101108BEWO	Sumpter Dist'n Calgary AB WC	DB		11,58	2	7,886		7,086	

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			
006							
			tell us how to treat data yout or you want to map				
Import Option: 4	Add 🔻		Validate	Configuration		Preview of row	ws 1 - 100
Dimension	▼	Dimension V	Ignore 🔻	Measure V	Measure V	Measure V	
RepBroker	•	Customer Ship-To	<u> </u>	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	
	312	101113BEWO	Sumpter Dist'n Buffalo NY WOB	7 857	4 750	4 672	

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

				Data	Mapping		
000							
layout doesn't i	mate			tell us how to treat data yout or you want to map	to different data th		
Import Option: Add	•			Validate	Configuration		U Preview of ro
Dimension	▼	Dimension	Ŧ	Ignore 🔻	Measure 🔻	Measure 🔻	Measure 🔻
RepBroker	▼	Customer Ship-To	▼	•	User Forecast Unit 1	User Forecast Unit 2	User Forecast Unit 3
				From	Sales Estimates 1	Sales Estimates 2	Sales Estimates 3
				For Future Forecast	December	December	December
				Date	2020-12-01	2020-12-01	2020-12-01
RepBroker		Customer Ship-To		ShpTo Long Description	Forecast 1	Forecast 2	Forecast 3
	312	101113		Sumpter Dist'n Buffalo NY	10,84	9,422	8,126
	312	101107		Sumpter Dist'n Seattle WA	7,66	7,168	11,185
	312	101112		Sumpter Dist'n - Dallas TX	11,73	6,626	7,049
	312	101110		Sumpter Dist'n Quebec QC	11,33	10,865	12,889
	312	101109		Sumpter Dist'n Winnipeg MB	9,19	7,227	10,553
	312	101107BCTH		Sumpter Dist'n Seattle WA THB	4,47	3,947	8,560
	312	101113BEWO		Sumpter Dist'n Buffalo NY WOB	7,85	4,750	4,672
	312	101108		Sumpter Dist'n Calgary AB	10,63	11,376	13,012
	312	101107JCTH		Sumpter Dist'n Seattle WA THJ	4,02	3,552	7,704
	312	101111		Sumpter Dist'n St. John NB	6,65	6,144	8,481
	312	101112BCTH		Sumpter Dist'n - Dallas TX THB	8,58	3,143	4,044
	312	101108BEWO		Sumpter Dist'n Calgary AB WOB	11,58	7,866	7,086

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

Did you import fail with a message such as the one shown below – about an "Import Calendar not Defined for the following Transaction Date"? That means the date listed in the error message is in your import 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.

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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
30 Process Status:	Completed
Data Import Deta	
Ready 🔠	⊞ □ □ − + 80%
Import Calendar Maintenance	×

tructure Code	Year	Bucket	Ending Date 🔺			anu	iary	20	19		New
J2 - User Forecast/5/64/00 🗸	2016	1	01/05/2019		Mo		_				
	2017	2	01/12/2019	Ju	NIC	1	2	2	1	5	Save
	2018	3	01/19/2019		7	0	2	3	4	5 12	Delete
	2019	4	01/26/2019	12	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	20	20	
	2022	7	02/09/2019				-				Add Bucket
		8	02/16/2019								Remove Bucket
		9	02/23/2019								
		10	02/28/2019								Print
		11	03/02/2019								Print Preview
		12	03/09/2019								FIInt Fleview
			~								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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F28 - : ×	\checkmark fx \checkmark
A	В
21 Completed Date:	10/7/2019 10:32:45
22	
23 Stage:	Data Validation
24 Process Status:	Error
25	Error : Internal error: The operation terminated unsuccessfully. Errors in the OLAP storage engine: The attribute key cannot be found when processing: Table: 'mtml47', Column: 'viewgroupid', Value: '4'; Table: 'mtml47', Column: 'salesyear', Value: '2019'; Table: 'mtml47', Column: 'periodnum', Value: '31'. The attribute is 'Time Value'. Errors in the OLAP storage engine: The record was skipped because the attribute key was not found. Attribute: Time Value of Dimension: Time from Database: DevConn, Cube: DevConn, Measure Group: MLL User Controlled Data, Partition: MLL User Controlled Data UCD, Record: 13. Errors in the OLAP storage engine: The process operation ended because the number of errors encountered during processing reached the defined limit of allowable errors for the operation. Errors in the OLAP storage engine: An error occurred while processing the 'MLL User Controlled Data UCD' partition of the 'MLL User Controlled Data' measure group for the 'DevConn' cube from the DevConn database. Server: The current operation was cancelled because another operation in the transaction failed. StackTrace : at Silvon.Viewer.DataImport.ProcessFactTableToCube(Int32 stratumServerApplicationId, String keyErrorLogFolder, List` 1 affectedDimensions) at Silvon.Viewer.DataImport.Process()
26 Start Date:	10/7/2019 10:32:45
27 Completed Date:	10/7/2019 10:32:45
28	
29 Stage Data Import I	Send Email
Ready 🔠	E E E − + 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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File name: Sales-Receipts-OneOff-Event.xlsx		~
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Authors: Tags:		
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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 Tran	saction Date:	3				
Transaction	Date Format:	yyyy-mm-dd (2012-	03-01) 🗸			
	ОК	Cancel		Help		
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000						
Use this preview of		t file to tell us by	w to troat data du	ing the im	nort Click the	
Configuration buttor						
different data than v					,	
Import Option: Add		Validate	e Configuration		C Preview	of rows 1 - 100
Dimension	▼ Ignore		Measure	▼ Measure	T	Measure
			- Select a Target -			User Forecast L
Customer Ship-To	•	•	User Forecast Amt 1	Sales		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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	А	В	С		D		E		F		G		
1					Week #	1	Veek 1		Week 2		Week 3		
2					Date	20	19-12-29		2020-01-05		2020-01-12	2	
3	Division	Distribution Center Warehouse	Customer Ship-To		ShpTo Long Description	Sa	lles Units		Sales Units		Sales Units	5	
4	G	19	101138	Auburn	Providers Seattle WA			265		458		604	
5	G	19	101138ALAB	Aupurn	Providers Seattle WA ABA			259		282		370	
6	G	19	101138BLAB	Aupurn	Providers Seattle WA ABB			519		563		740	
7	G	19	101138CLAB	Auburn	Providers Seattle WA ABC			285		310		407	
-	G	19	101138DLAB		Providers Seattle WA ABD			311		338		444	
	G	19	101138ELAB	Aubu				337		366		481	-
10		19	101138FLAB	Aupurn				363		394		518	-
11		19	101138GLAB	Auburn	Dimensions In			389		422		555	_
12		19	101138HLAB	Auburn	Import File			415		450		592	-
13		19	101138ILAB	Auburn				441		479		629	-1
14		19	101138JLAB	Auburn				467		507		666	-1
15		19	101138KLAB		Providers Seattle WA ABK			259		282		370	-
16		19	101138ADMC		Providers Seattle WA MCA			974		778		177	-1
17		19	101138BDMC		Providers Seattle WA MCB			897		8		6	-
18		19	101138CDMC		Providers Seattle WA MCC	+		1,794		17		11	-
19		19 19	101138DDMC		Providers Seattle WA MCD	+		987		9		6	-
20		19	101138EDMC 101138FDMC		Providers Seattle WA MCE Providers Seattle WA MCF			1,076		10 11		1	-
21		19	101138FDMC 101138GDMC		Providers Seattle WA MCF Providers Seattle WA MCG			1,166		11		/ 8	-
22 23		19	101138GDMC 101138HDMC		Providers Seattle WA MCG Providers Seattle WA MCH	+		1,256		12		8	-
23		19	101138HDMC		Providers Seattle WA MCH Providers Seattle WA MCI			1,340		12		8	-
24			1011381DMC		Providers Seattle WA MCT	+		1,433		14		9	
) UC	CD DCWDivWeeklySa					1						Þ
											■ □	+ 80	096

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

Data Mapping

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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	▼	Ignore	▼	Measure V	Measure	▼
Division	•	Distribution Center Warehouse 🔻	Customer Ship-To	Ŧ		•	User Budget Unit 1 🛛 🔻	User Budget Unit 1	▼
					Week	#	Week 1	Week 2	
					D.		2019-12-29	2020-01-05	
Division		Distribution Center Warehouse	Customer Ship-To		D. Shp1		ales Units	Sales Units	
G		19	101138		Auburi	1	265	5	458
G		19	101138ALAB		Auburi	Mapped	259)	282
G		19	101138BLAB		Auburi	Dimensions	519)	563
G		19	101138CLAB		Auburi	n A	285	5	31(
G		19	101138DLAB		Auburi	n F	311		338
G		19	101138ELAB		Auburi	Providers Seattle WA ABE	337	7	366
G		19	101138FLAB		Auburi	Providers Seattle WA ABF	363	3	394
G		19	101138GLAB		Auburi	Providers Seattle WA ABG	389)	422
G		19	101138HLAB		Auburi	Providers Seattle WA ABH	415	5	45(
G		19	101138ILAB		Auburi	Providers Seattle WA ABI	441	L	479
G		19	101138JLAB		Auburi	Providers Seattle WA ABJ	467	7	507
G		19	101138KLAB		Auburi	Providers Seattle WA ABK	259)	282
G		19	101138ADMC		Auburi	Providers Seattle WA MCA	974	ł	778

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 Distribution Center Warehouse Attribute
	Warehouse State	
	Distribution Channel	None
	Division	Import File 🦰
241		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	t	None
5 Produ	ict ABC Class	None
3 Produ	ict Commodity	None
7 Produ	ıct Primary	None
3 Produ	ict Primary	None
) Produ	ict Purchasing	None
Product	Brand	None
1 Product	Category	None
2 Product	Category	None
3 Product	Class	None
1 Product	Family	None
5 Product	Group	None
B Product	SubClass	None

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

★ Auburn Providers Imported Data										
			Q	123			0	0091	to 2 of 2	00001t
Rows: II Product Brand: All × > II Division × II Distribution Center Warehouse × II Customer Ship-To × II Customer Class × III + +										
Columns:	∷ <u>Year: 2020</u> × > ∷	Months: All	× > IIWe	eks ×	+					
View Filter:	+						_			_
	Year	<u>2020</u>								
	<u>Months</u>	<u>January</u>	February	March	<u>April</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>August</u>	September
Product Brand	PBrnd Long Description	User Budget Unit 1								
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									
	0	🕅 🚔 🝙 🔤		Y 123 🕜 She		000 1 to	50 of 91	0000	1 to 5 of 9	
Rows: III >> III Division: All >> III Distribution Center Warehouse: All >> III Customer Ship-To: Filtered >> II Customer Class >> III >> III Customer Class >> IIIII Customer Class >> III Customer Class >> III Customer										
view i	Fliter:	T								
				<u>Year</u>	<u>2020</u>					
				Months	<u>January</u>	February	March	<u>April</u>	<u>May</u>	
Divisi	on <u>Dist</u>	ribution Center Warehouse	T Customer Ship-To	ShpTo Long Description	User Budget Unit 1					
<u>G</u>	<u>19</u>		101138	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>		<u>101138BLAB</u>	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	
<u>G</u>	<u>19</u>		101138DLAB	Auburn Providers Seattle WA ABD	1,974	1,222	964	924	2,838	
<u>G</u>	<u>19</u>		<u>101138ELAB</u>	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	
G	<u>19</u>		<u>101138ILAB</u>	Auburn Providers Seattle WA ABI	2,796	1,731	1,365	1,309	4,021	
G	<u>19</u>		<u>101138JLAB</u>	Auburn Providers Seattle WA ABJ	2,961	1,833	1,446	1,386	4,258	
Q	<u>19</u>		<u>101138KLAB</u>	Auburn Providers Seattle WA ABK	1,645	1,018	803	770	2,365	
	475		AVAA A DIDALNAAZ	Automa Dusuidana Casada MAA MACA	4.050	2 40.4	200	2 0 2 7	2 2 6 2	

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.

,	AutoSave 🤇	Off H	9.6.		í	ProductSales/	Amounts	s.xlsx - Save	ed	llh.			T	-	
Fi	ile Hon	ne Insert	Page Layout	Formulas	Data	Review	View	Add-ins	Help	PDF	ACROBAT	Team	Q	Tell me	2 D
G3	397	- : ×	s fx												~
		A	В			С			D			E		F	G
1	Date	(Product	Pro	od Long	Descriptio	on	Amount			Units				
2	2017-01-3	1	620A914001	Pea	ar Hlvs L	.S 12 oz BR	* 0A		738	3.90169			16.56		
3	2017-01-3	1	620A914002	Pea	ach Hlvs	HS 12 oz B	3R* 0A		1855	5.10919			41.4		
4	2017-01-3	1	620A914003	Apr	olesauce	e 12oz BR* (0A		6848	3.83804		1	57.32		
5	2017-01-3	1	620A914008	Pea	ar Sics I	S 12 oz BR	R* 0A		743	3.76757			16.56		
6	2017-01-3	1	620A914016	Pea	ach Sics	LS 16 oz B	3R* 0A		3205	5.34814		:	5 <mark>7.9</mark> 6		
7	2017-01-3	1	620A914025	Ma	nd Org I	^p cs 12oz BF	R* 0A		3994	1.38249			80.04		
8	2017-01-3	1	620A914315	Tro	pical Mi	x LS 12oz B	3R* 0A		8544	1.18458		1	76.64		
9	2017-01-3	1	620A914322	Pea	ach 6oz	LnchPk BR	* 0A		41689	9.68487		474.7	2002		
10	2017-01-3	1	620A914401	Pna	appl Slc	s 12 oz BR*	0A		2610	0.16794		:	57.96		
11	2017-01-3	1	620A914402	P	Pitt	ed 12 oz BR	R* 0A		668	3.20428			13.8		
12	2017-01-3	1	620A914403	Pna	арн				2136	5.14344			46.92		
13	2017-01-3	1	620A914404	Frt	Ckta	Dimensio	n In		35592	2.77023		808.6	68004		
14	2017-01-3	1	620A914603	Bla	ckb	Import F			1081	7.16885		:	220.8		
15	2017-01-3	1	620A924015	Pea	ach	import r	-lie		1610	02.4475		433.3	32002		
16	2017-01-3	1	620A924401	Pna	appl				3996	5. <mark>9216</mark> 9		1	04.88		
17	2017-01-3	1	620A924403	Pna	appl Bite	s 12oz PL*	0A		6284	4.27173		1	62.84		
18	2017-01-3	1	620A924404	Frt	Cktail LS	6 12oz PL* (0A		9317	7.92302		248.4	10001		
19	2017-01-3	1	620A924622	App	ole Fillin	g 12oz PL*	0A		1442	2.40363			41.4		
20	2017-01-3	1	620A924624	Blu	eberry I	- Filling 12oz I	BR* 0A		19472	2.55937		474.7	2002		
21	2017-01-3	1	620A954000	Red	d Ripe T	omatoes 0A	\		60527	7.22896		1606.3	32003		
22	2017-01-3	1	620A954003	Apr	olesauce	e 106oz BR*	* 0A		11832	2.01535		1	57.32		
23	2017-01-3	1	620A954005	Por	k Cutlet	s 0A			84616	6.27757		1255.8	30003		
24	2017-01-3	1	620A954007	Gro	ound Ro	und 90% Le	an 0A		5000	02.9541		1015.6	68005		
05	0047.04 0		ith Transaction		0	۸				CAEDA		4400 0	-0005		
		FIGUACEW		Ja (+)					•		_				•
														+	+ 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
	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.

		★ Importe	d Product Data			
- <u>o</u>	XI 🗎 🏫			🕒 5414 to 5463 of 55	13 000011	to 2 of 2
Rows:	Product Brand: /	All × > II Product: All × > II Product Fa	amily × EProduct Group ×	Product Class ×	Product Catego	+
			,			
Columns:	🗄 <u>Year: All</u> 🗙 义	∷Months × +				
	+					
View Filter:	T					
		Year	2017	2017		
roduct Brar	nd PBrnd Long Descrip	tion Product Prod Long Description U	CD 4 Basic Day UCD Amt 1 UCD	4 Basic Day UCD Unit 1		
<u>02</u>	Dew Drop	954010 Iceberg Lettuce Salad	\$3,511,058.92	125,897		
<u>02</u>	Dew Drop	954021 Romaine Specialty Salad	\$9,171,471.65	127,432		
<u>03</u>	SuperSweet	954011 Baby Carrots	\$5,017,193.46	125,848		
<u>04</u>	Idaho Delight	954013 Potatoes - Idaho Russett	\$4,954,092.79	125,947		
<u>05</u>	Farm Crisp	954009 Apples Red Delicious	\$7,121,932.70	183,612		
<u>06</u>	Southern Sweet	954020 Navel Oranges	\$7,222,891.73	184,448		
<u>06</u>	Southern Sweet	954024 Orange Juice Conc.	\$12,114,796.07	179,709		
<u>07</u>	SugarDrop	954016 Strawberries	\$9,084,950.15	126,383		
<u>08</u>	Bing-a-ling	954017 Cherries, Bing	\$10,664,049.99	147,580		
<u>09</u>	Farm Fresh	914001 Pear Hlvs LS 12 oz BR*	\$1,705,313.07	38,687		
<u>09</u>	Farm Fresh	914002 Peach Hlvs HS 12 oz BR*	\$1,354,398.65	30,575		
<u>09</u>	Farm Fresh	914003 Applesauce 12oz BR*	\$2,948,097.56	68,420		
09	Farm Fresh	914004 FrtCktail HS 12 oz BR*	\$3,425,113.02	77,713		
09	Farm Fresh	914008 Pear Slcs LS 12 oz BR*	\$5,753,146.24	129,905		
			d Product Data	70 000		>
Rows:	Image: Second	★ Importer	d Product Data	000 1 to 50 of 55		to 2 of 2
Ģ	Image: Product Brand: A Image: Product Brand: A Image: Product Brand: A	III III IIII IIIII IIIIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	d Product Data	000 1 to 50 of 55		to 2 of 2
Rows: Columns:		III III IIII IIIII IIIIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	d Product Data	000 1 to 50 of 55		to 2 of 2
Rows: Columns:	∷Year: All × >	III III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	d Product Data	000 1 to 50 of 55		to 2 of 2
Rows: Columns: Tiew Filter:	∷Year: All × >	All × > # Product: All × > # Product Fa #Months × + <u>Year</u>	d Product Data Show All smily Product Group 2017	2017	Product Catege	to 2 of 2
Rows: Columns: iew Filter:	HYear: All × > + PBrnd Long Descrip	All × > # Product: All × > # Product Fa #Months × + <u>Year</u>	d Product Data Show All Show All amily Product Group 2017	C C	Product Catege	to 2 of 2
Rows: Columns: fiew Filter:	II Year: All × + nd PBrnd Long Descrip	III Image: Constraint of the second state of the second stat	d Product Data Image: Show All	C C	ii Product Catege	to 2 of 2
Rows: Columns: iew Filter:	II Year: All × + Md PBrnd Long Descrip ? N	Image: Non-theory of the second system Product: All × > II Product Fill All × > II Product: All × > II Product Fill II Months × + Months × + Image: Non-theory of the second system	d Product Data Show All C amily X II Product Group X 2017 UCD 4 Basic Day UCD Amt 1 \$18,238.55	C C	if 1 411	to 2 of 2
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Rows: Columns: fiew Filter:	II Year: All × > + nd PBrnd Long Descrip ? ↓ ? ↓ ? ↓	Image: Non-State Product: All Product: All Product Fill All X > Product: All X > Product Fill Months X + Year Image: Non-State Product Prod Long Description 620A914001 Pear Hivs LS 12 oz BR* 0A 620A914002 620A914003 Applesauce 12oz BR* 0A 620A914003	d Product Data Show All Caramily X II Product Group X 2017 UCD 4 Basic Day UCD Amt 1 \$18,238.59 \$12,008.62 \$12,008.62 \$64,876.83	Comparison of the second	ii Product Catege	to 2 of 2
Rows: Columns: fiew Filter:	II Year: All × > + Id PBrnd Long Descrip ? ? ? ? ? ? ? ? ? ?	Image: Non-State Image: Non-State Image: Non-State Image: Non-State All × > Image: Non-State Image: Non-State Image: Non-State Image: Non-State All × > Image: Non-State Image: Non-State Image: Non-State Image: Non-State All × > Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: Non-State Image: N	d Product Data Show All Carrier Show Al	Comparison of the second	Product Catege	to 2 of 2
Rows: Columns: Tiew Filter:	Year: All × > + PBrnd Long Descrip ? ? ? ? ? ? ? ? ?	Image Image Image Image Image All × > Product: All × > Product Fill Months × + + Product Fill Prod Long Description 620A914001 Pear Hlvs LS 12 oz BR* 0A 620A914002 Peach Hlvs HS 12 oz BR* 0A 620A914003 Applesauce 12oz BR* 0A 620A914004 FrtCktail HS 12 oz BR* 0A 620A914008 Pear Slcs LS 12 oz BR* 0A	d Product Data Show All Carlor amily X II Product Group X 2017 UCD 4 Basic Day UCD Amt 1 S18,238.56 S12,008.62 S48,451.23 S48,451.23	Control Class Control	Product Catege	to 2 of 2
Rows: Columns: Troduct Bran	Image: Year: All × > + Image: PBrnd Long Descrip ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	Image Image Image Image Image All × > ::::::::::::::::::::::::::::::::::::	d Product Data Show All Carlos Show All Carlo	Control Class Control	Product Catege	to 2 of 2
Rows: Columns: Troduct Bran	Image: Year: All × > + Image: PBrnd Long Descrip ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	Image Image Image Image Image All × > Image Image <td< td=""><td>d Product Data Show All Show All Carrier Show All Carrie</td><td>Control Class Control Class Control</td><td>Product Catege</td><td>to 2 of 2</td></td<>	d Product Data Show All Show All Carrier Show All Carrie	Control Class Control	Product Catege	to 2 of 2
Rows: Columns: fiew Filter:	Year: All × > + PBrnd Long Descrip ? C ?	All × > Product: All × > Product File Months × + Months × + Mon	d Product Data Show All amily ★ # Product Group ★ 2017 UCD 4 Basic Day UCD Arnt 1 \$18,238.56 \$12,008.62 \$48,451.23 \$24,130.63 \$39,018.18 \$48,451.23 \$24,130.63 \$38,223.01 \$36,842.28 \$35,003.23	Control Class Control	if Product Catege	to 2 of 2
Rows: Columns: View Filter:	Image: Year: All X I	All × > :: Product: All × > :: Product File Months × + Months × +	d Product Data Show All amily ★ # Product Group ★ 2017 UCD 4 Basic Day UCD Arnt 1 \$18,238.56 \$12,008.62 \$48,451.23 \$24,130.63 \$39,018.18 \$48,451.23 \$24,130.63 \$38,223.01 \$36,842.28 \$35,003.23	Control Class Control	ii Product Catege	to 2 of 2
Rows: Columns: View Filter:	Image: Year: All X > + Image: PBrnd Long Descrip ?	All × > # Product: All × > # Product Failer Months × + Months × +	d Product Data Show All amily × ∷ Product Group × 2017 UCD 4 Basic Day UCD Arnt 1 \$18,238.56 \$12,008.66 \$64,876.83 \$39,018.18 \$48,451.22 \$33,003.22 0A \$37,891.87 \$51,221.87	Control Class Control	ii Product Catege	to 2 of 2
Rows: Columns: View Filter:	Year: All × > + PBrnd Long Descrip ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	All × > :: Product: All × > :: Product File Months × + Months × +	d Product Data Show All amily × ∷ Product Group × 2017 UCD 4 Basic Day UCD Arnt 1 \$18,238.56 \$12,008.66 \$64,876.83 \$39,018.18 \$48,451.22 \$33,003.22 0A \$37,891.87 \$51,221.87	Comparison of the second	ii Product Catege	to 2 of 2
Rows: Columns: View Filter:	Image: Year: All image: Ye	All × > :: Product: All × > :: Product File Months × + Months × +	d Product Data Show All Show All Composition of the second state	Control Class Control	ii Product Catege	to 2 of 2

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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.

	Α	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
		Nicole Toscano	101106BEWO	Wilder Foods St Louis MO WOB	93,474	88,850	103,857
		Nicole Toscano	101106JEWO	Wilder Foods St Louis MO WOJ	84,127	79,965	93,471
		Nicole Toscano	101106IEWO	Wilder Foods St Louis MO WOI	79,453	75,522	88,278
		Nicole Toscano	101106	Wilder Foods St Louis MO	77,501	70,586	82,518
		Nicole Toscano	101106HEWO	Wilder Foods St Louis MO WOH	74,780	71,080	83,086
		Nicole Toscano	101106GEWO	Wilder Foods St Louis MO WOG	70,106	66,637	77,893
10 3	300	Nicole Toscano	101106FEWO	Wilder Foods St Louis MO WOF	65.432	62.195	72.700
11							
12 3		Nicole Tos	101103BEWO	Wilder Foods Buttalo NY WOB	56,185	56,133	64,276
13 3		Nicole Toscai.	101106DEWO	Wilder Foods St Louis MO WOD	56,085	53,310	62,314
14 3		Nicole Toscano		Wilder Foods St Louis MO WOC	51,411	48,867	57,121
		Nicole Toscano Flim	inate Null	Wilder Foods Buffalo NY WOJ	50,566	50,519	57,848
16 3	300	Nicolo Toscano	rom Import	Wilder Foods Buffalo NY WOI	47,757	47,713	54,635
17 3	300	Nicole Toscano		Wilder Foods St Louis MO WOA	46,737	44,425	51,928
18 3		Nicole Toscano	File	Wilder Foods St Louis MO WOK	46,737	44,425	51,928
19 3	305	Janice Tierney		Harrington's St Louis MO WOB	25,915	27,152	29,843
20 3	305	Janice Tierney	10111/JEWO	Harrington's St Louis MO WOJ	23,324	24,437	26,859
21 3	305	Janice Tierney	101117IEWO	Harrington's St Louis MO WOI	22,028	23,079	25,366
22 3	305	Janice Tierney	101117HEWO	Harrington's St Louis MO WOH	20,732	21,721	23,874
23 3	805	Janice Tierney	101117GEWO	Harrington's St Louis MO WOG	19,436	20,364	22,382
24 3	805	Janice Tierney	101117	Harrington's St Louis MO	21,081	20,691	22,074
-	•	User Forecast with AS	Compa View [Detail 📋 🕂	•		
							+ 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									
Use the Configuration options and Mapping preview to tell us how to treat data for the import.									
Description: Optionally enter a	description for this import			Configu	ration Delete Category Data B	efore Import			
Click Process to import your da	ta or click Add Template first to	save mapping for future use.	Add Temr						
	Import Configuration		× ore	•	Measure 🔻	Measure			
				•	User POS Amt 4	User POS Unit 4			
Source Of Data For	Import: Local File		ar L	ong Description	Daily Sales Daily Sales Amount	Daily Sales Daily			
Sour	ce Type: Excel		/ En	gland	\$10,782				
Target C	ategory: User POS	•	at La	akes	\$1,535				
larget C	ategory: User POS	\mathbf{v}	Coa	ast	\$4,956				
	Format: Transactions 🗸		anti	с	\$5,347				
Header Rows	s In File: 1		th C	entral	\$8,326				
			at P	ains	\$5,382				
Row That Contains Transaction	on Date:		thw	est	\$3,715				
Transaction Date	Format:	~	thwe	est	\$3,508				
			ern	Atlantic Provinces	\$8,742				
	OK Cancel	Help	terr	Provinces	\$4,010				
L			tral	Provinces	\$5,198				
2019-01-06	50	1	.04 New En	gland	\$10,782				
2019-01-06	50	1:	.05 Great La	akes	\$1,535				
2019-01-06	51	1.	02 Gulf Co	ast	\$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 Mapping									
Use this preview of your import file to tell us how to treat data during the import preview layout doesn't match the import file layout or you want to map to different properties To Adjust by button if the preview lists.									
▼ Dimension	▼ Ignore ▼	Measure 🔻	Measure V	Measure 🔻	Measure 🔻				
▼ Customer Ship-To	v	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	79,96	User Forecast Unit 1	97,550				
101106IEWO	Wilder Foods St Louis MO WOI	79,453	75,52	User Forecast Unit 2	92,130				
101106	Wilder Foods St Louis MO	77,501	. 70,580	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	19.893	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				
10110000000	Wilder Foods - Chilewie MO WOD	FC 005	- ED 010	(2.214	CE 033				

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	
Customer Type	Ship-To Territory	Daily Sales Daily Sales Amount 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

		Ар	D MEASURE	Item						x
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Budget			udget Units V							
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Budget Calc Value	Budget Calc Values Budget Calc Values Budget Units Working Calc									
Budget Calc Value	es	Budget Ca	alc Values Bu	Idgeted ASP \	Wo	rking Calc				
Budget Calc Value	es	Budget Ca	alc Values Bu	udget Amt Fro	oze	n Calc				
Budget Calc Values Budget Calc Values Budget Units Frozen Calc										
Budget Calc Value	es 🥏	Budget Ca	le Values Bu	Idgeted ASP I	Fro	zen Calc				
Daily Sales	(
Daily Sales	Daily Sales Daily Sales Daily Sales Units									
Deductions Open		Plan by Cu	ust Ship To A	Actual						
Deductions Open		Plan by Cu	ust Ship To V	Vorking						
Forecast		Forecast E	Baseline Fore	ecast						
Forecast		Forecast B	Best Forecast	t Adjustment	Un	nits				
Forecast		Forecast E	vents							
Forecast		Forecast F	itted Values							•
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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.

Image: Sector State	Daily Sales by Custom	er Type	
• • • • • • • • • • • • • • • • • • •			
Customer Type	Ship-To Territory	Daily Sales Daily Sales Amount 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.