Working with Data Import
Stratum.Viewer 7

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Definitions

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

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 and Stratum Cloud Import license for your implementation.

Data Import Functionality*	Who Can Use The Functionality*
Assign Data Steward 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 Enhanced / Data Steward 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

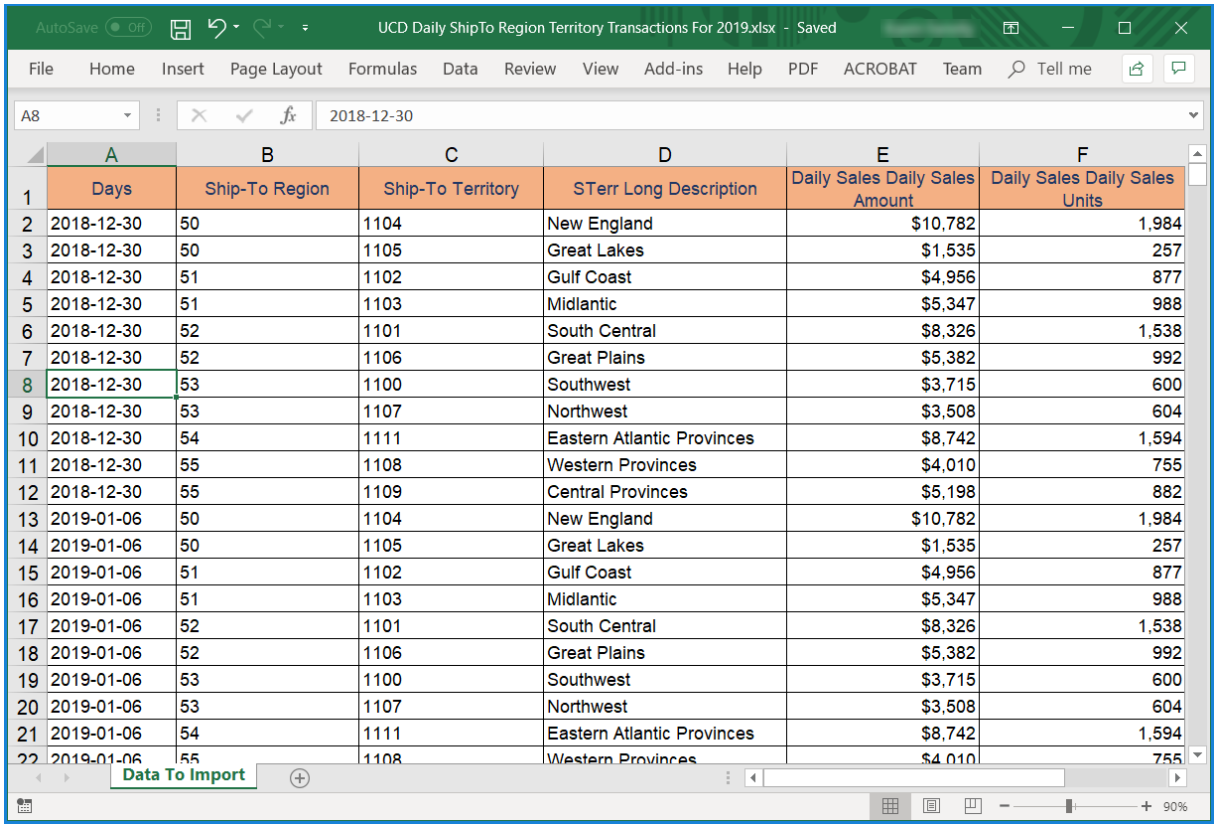
User-curated data housed in Excel spreadsheets or other types of sources can be imported directly into the Stratum Data hub via Viewer's Data Import. It's well suited for bringing demographics, budgets and plans, market trends, weather, and other outside data that compliments your core, enterprise data 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 re-usable 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.

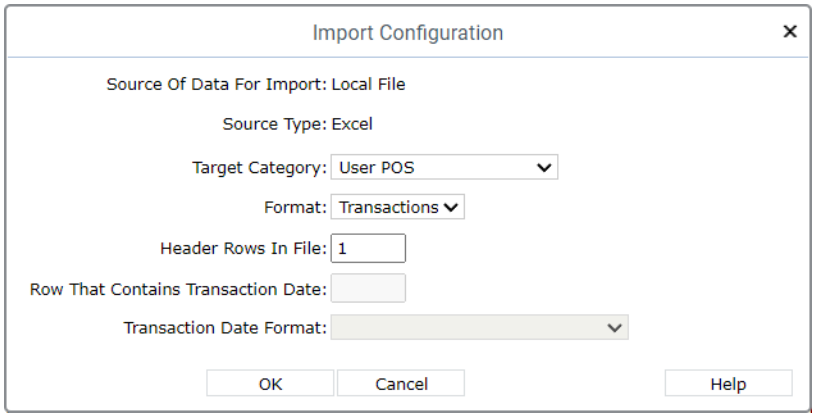
Example 1

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.

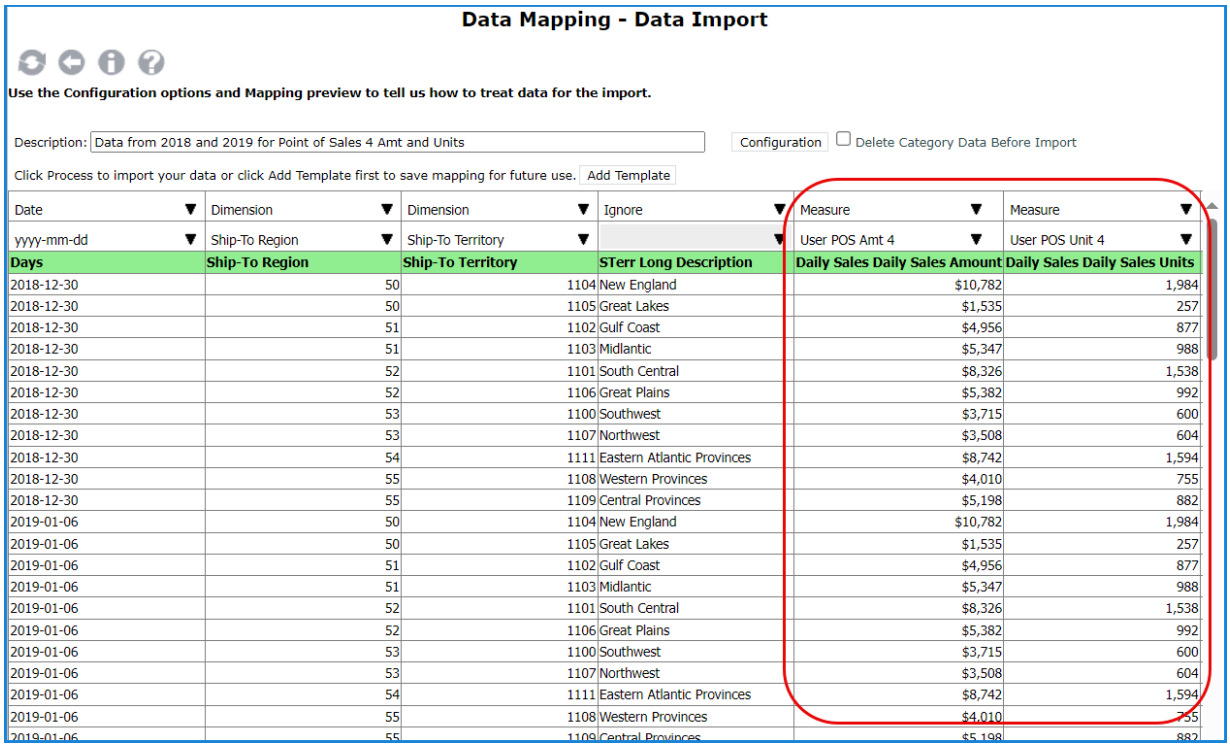


	A	B	C	D	E	F
1	Days	Ship-To Region	Ship-To Territory	STerr Long Description	Daily Sales Daily Sales Amount	Daily Sales Daily Sales Units
2	2018-12-30	50	1104	New England	$10,782	1,984
3	2018-12-30	50	1105	Great Lakes	$1,535	257
4	2018-12-30	51	1102	Gulf Coast	$4,956	877
5	2018-12-30	51	1103	Midlantic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

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



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.



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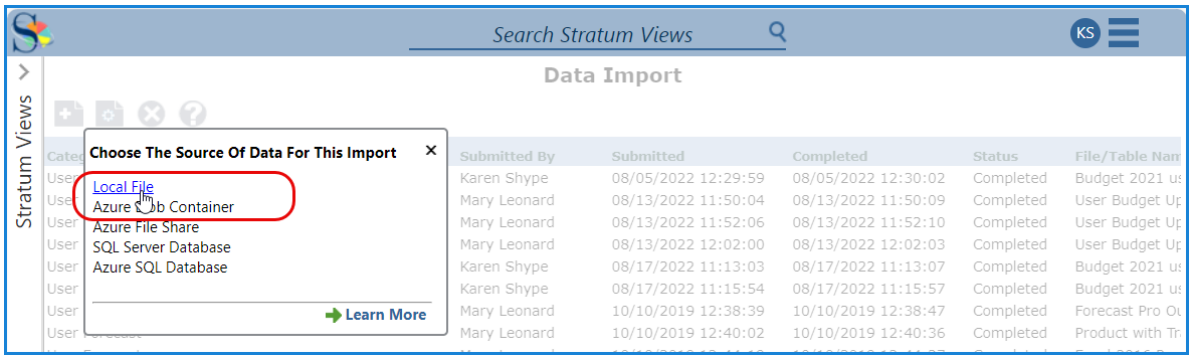
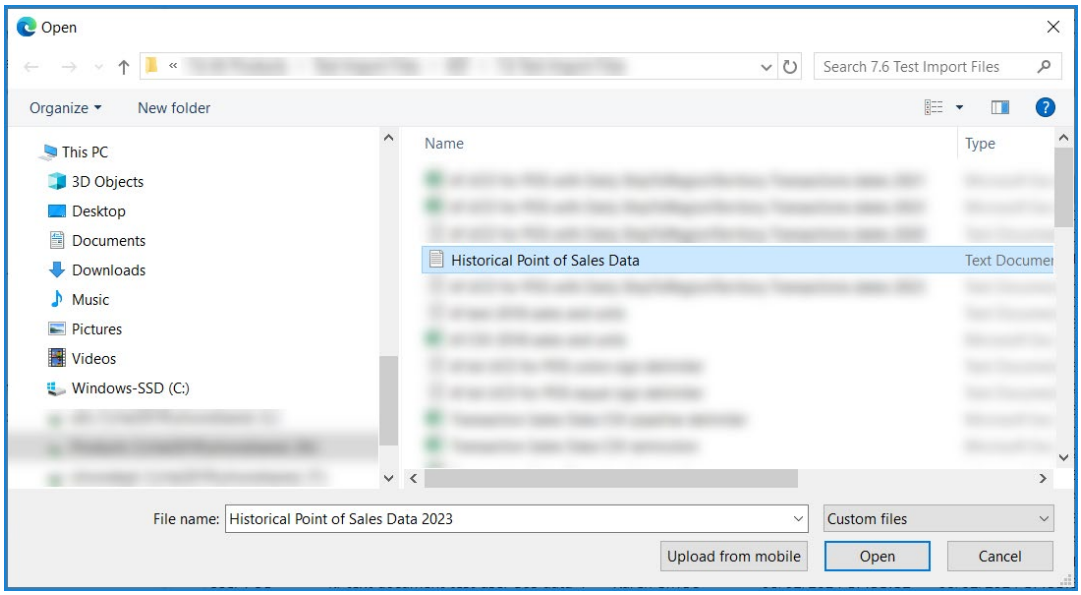
2019-01-06	52	1106	Great Plains	$5,382	992
2019-01-06	53	1100	Southwest	$3,715	600
2019-01-06	53	1107	Northwest	$3,508	604
2019-01-06	54	1111	Eastern Atlantic Provinces	$8,742	1,594
2019-01-06	55	1108	Western Provinces	$4,010	755
2019-01-06	55	1109	Central Provinces	$5,198	882

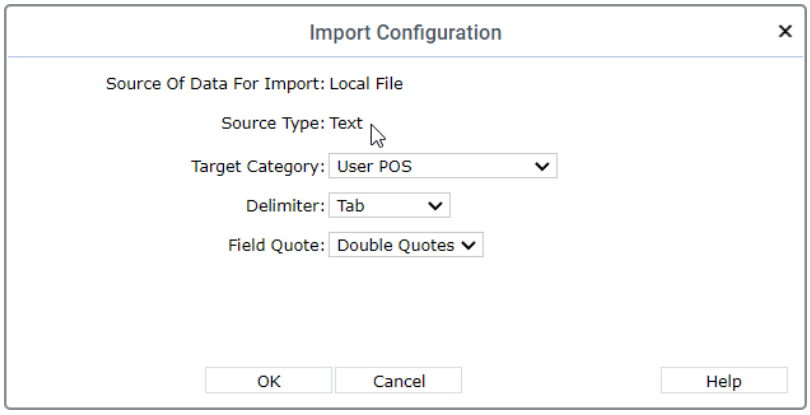
Example 2

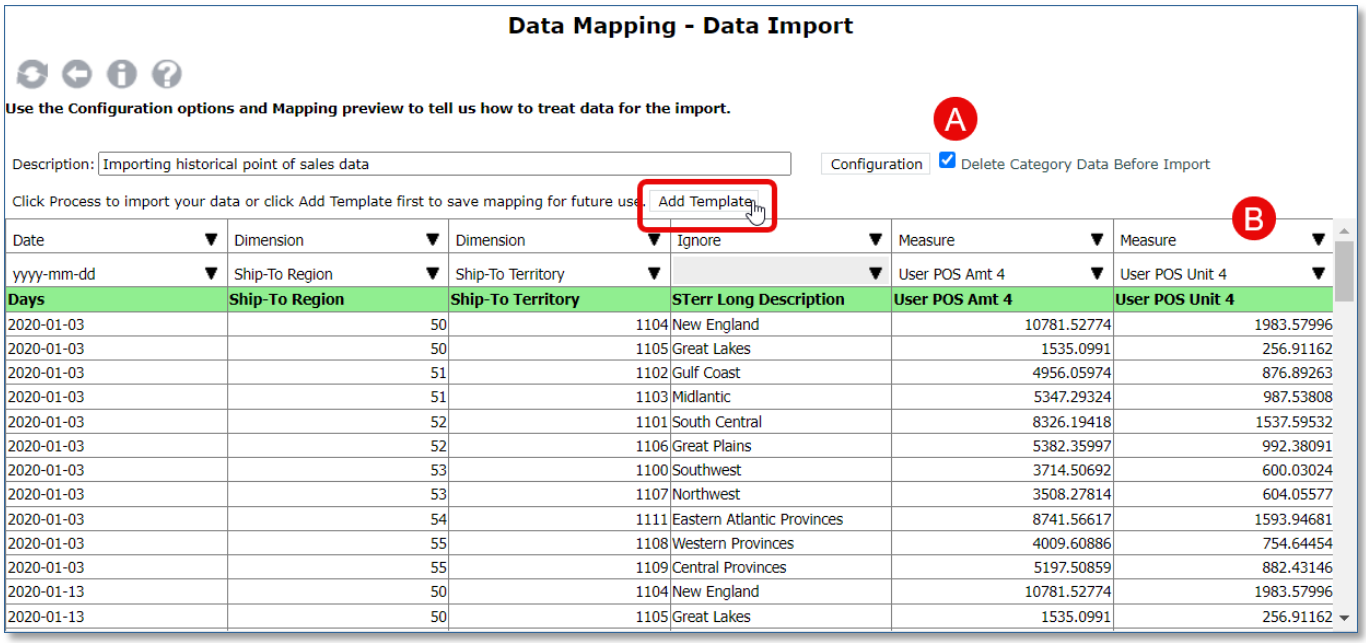
In the following example, a text file with Point of Sales data is used for the import source and a Data Import Template is being setup to automate some configuration and mapping steps – the template can be reused the next time this type of data is imported.



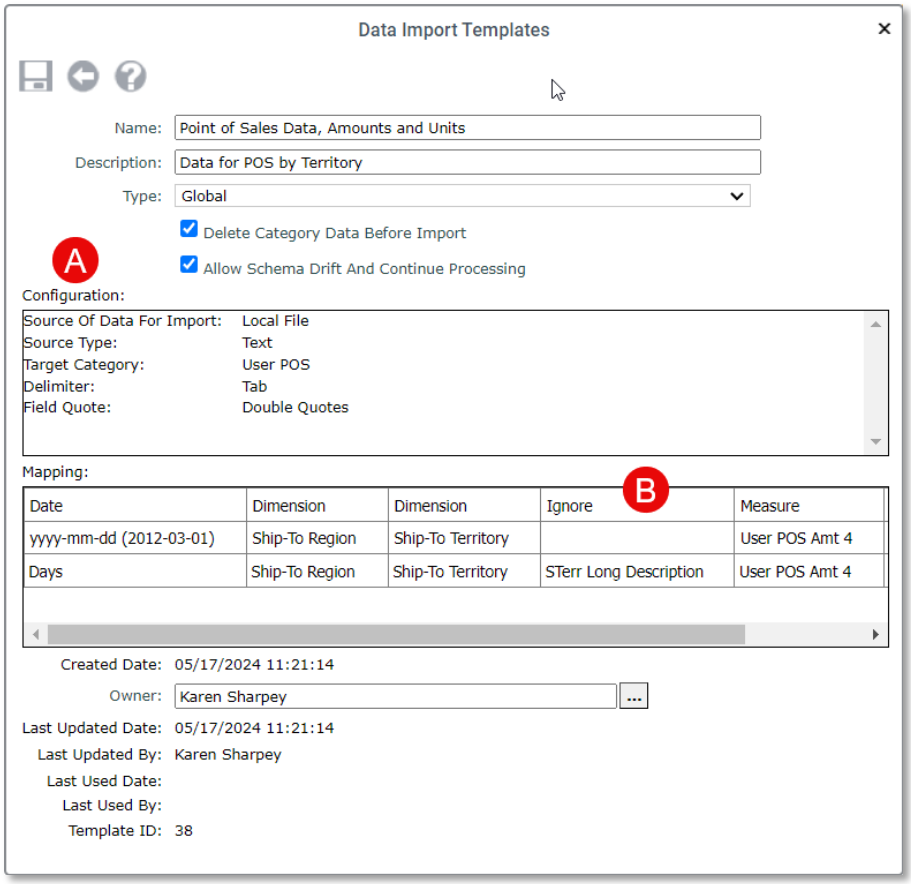


Data configuration and mapping choices about where data gets imported to were initially specified in Import Configuration and Data Mapping windows.





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.



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.

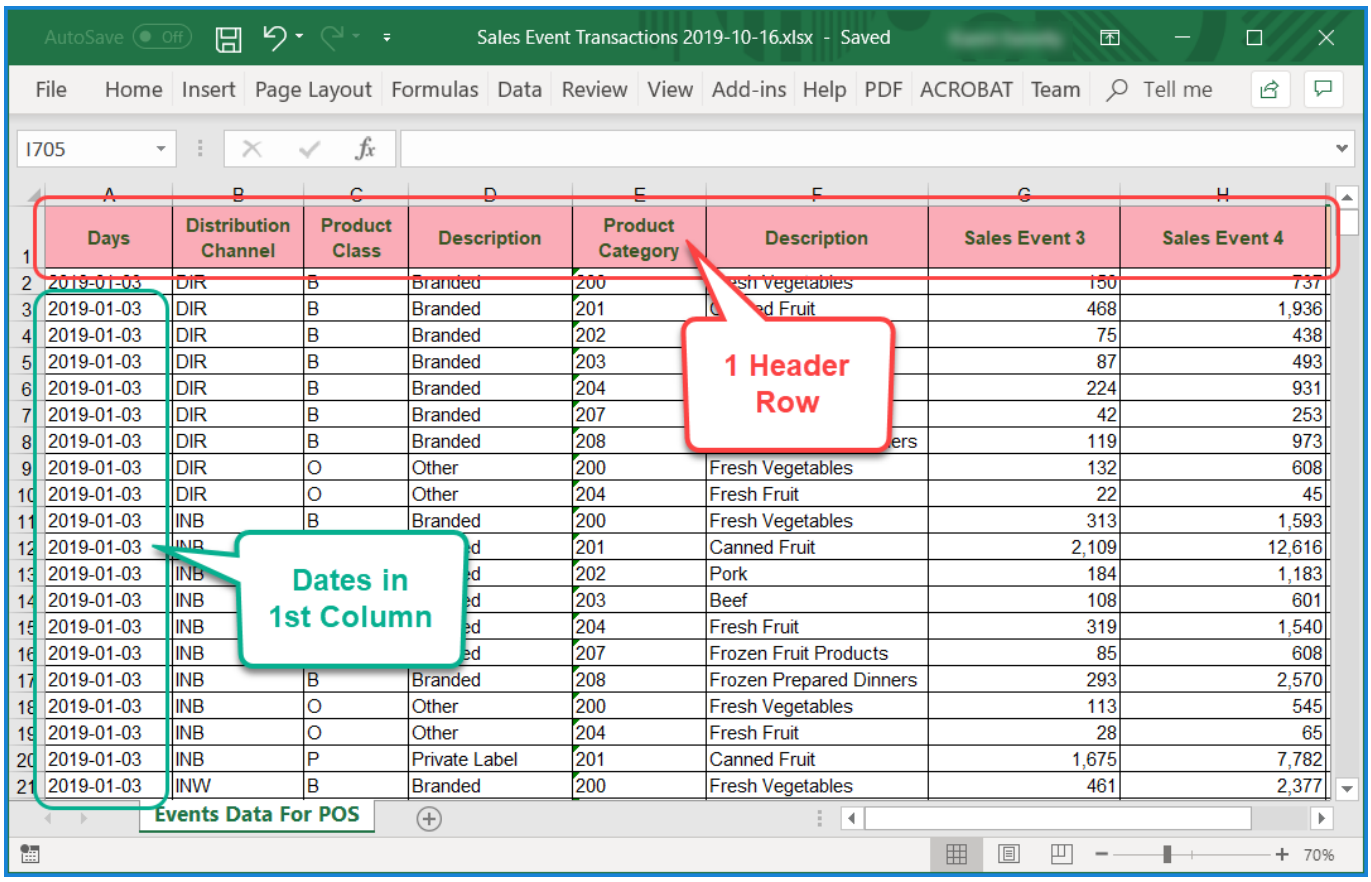
- They contain the detailed **measure data** to be imported. This is numeric data such as quantities, monetary amounts, or percentages.
- They contain **dimension and transaction date details** that tell Stratum.Viewer where to place the measure data during the import. Dimension details are the level 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

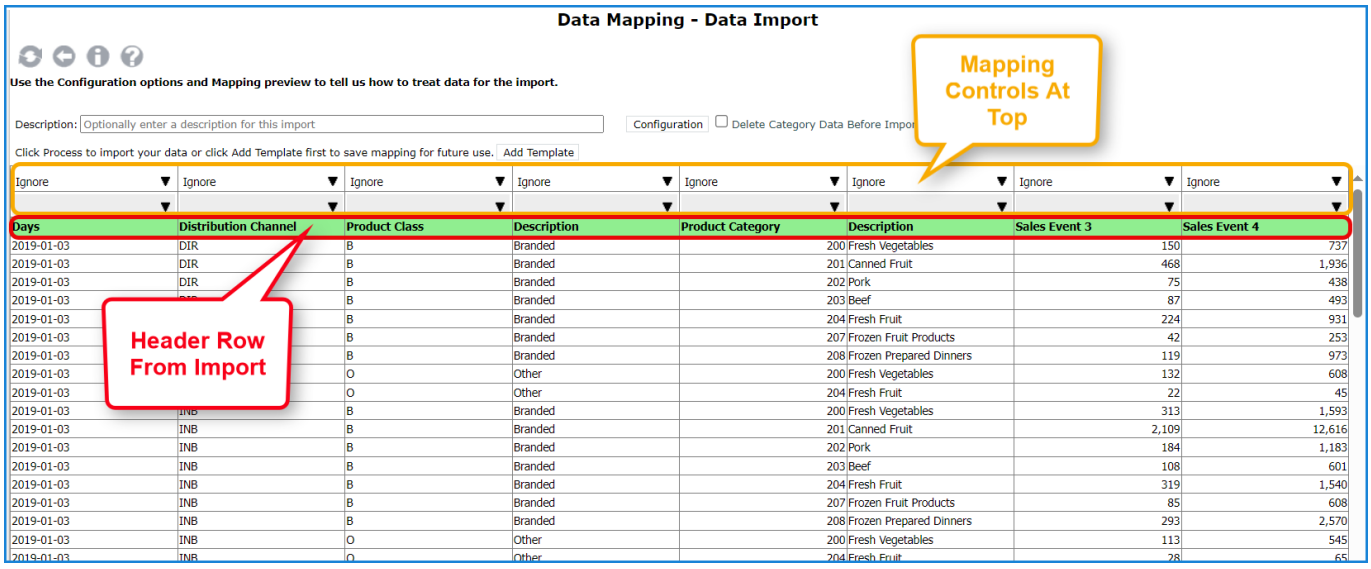
The following example import file has sales data that's meant to be imported into a POS category. Each row contains a transaction date, dimension and measure data. There is one header row at the top. Transaction dates are in the first column. Distribution Channel, Product Class, and Product Category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

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



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

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.



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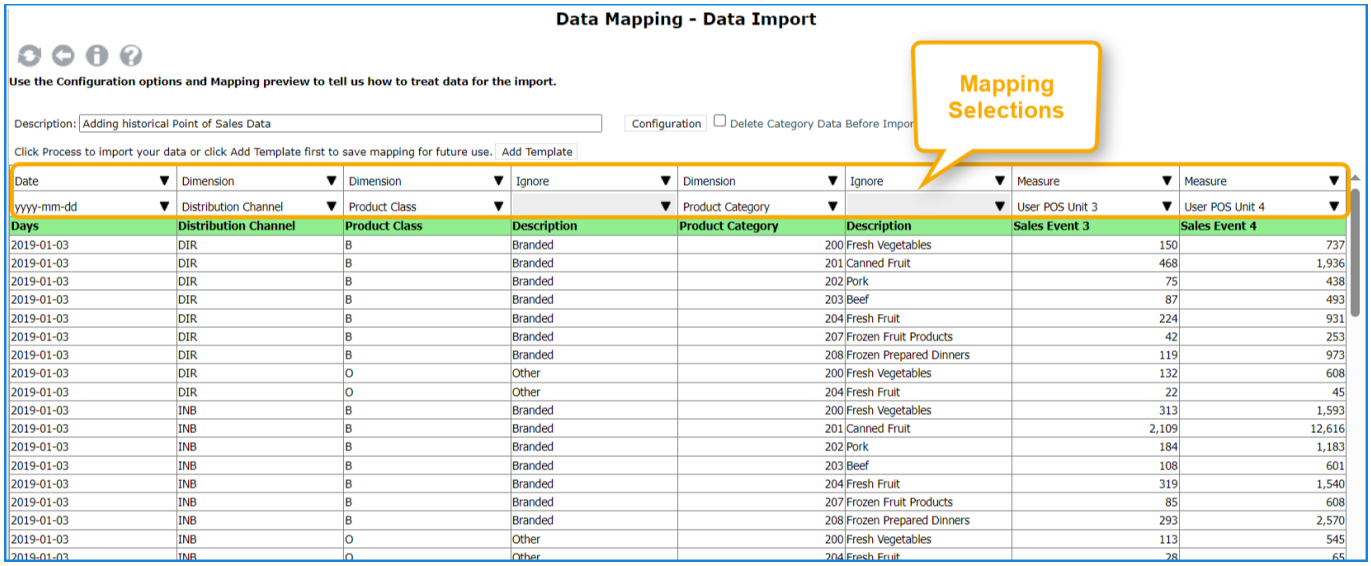
2019-01-03	DIR	B	Branded	204	Fresh Fruit	224	931
2019-01-03	DIR	B	Branded	207	Frozen Fruit Products	42	253
2019-01-03	DIR	B	Branded	208	Frozen Prepared Dinners	119	973
2019-01-03	DIR	O	Other	200	Fresh Vegetables	132	608
2019-01-03	DIR	O	Other	204	Fresh Fruit	22	45
2019-01-03	INB	B	Branded	200	Fresh Vegetables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

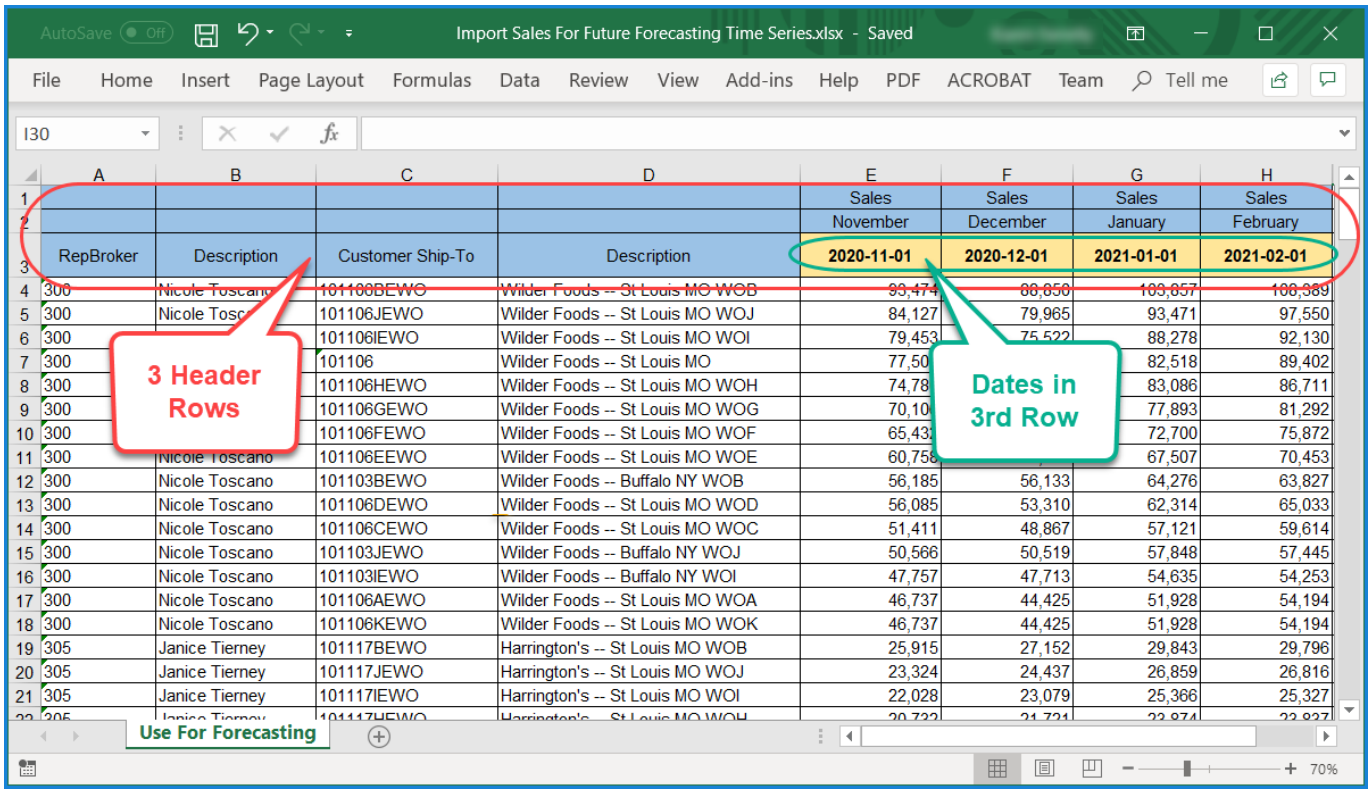


Date	Dimension	Dimension	Ignore	Dimension	Ignore	Measure	Measure
yyyy-mm-dd	Distribution Channel	Product Class		Product Category		User POS Unit 3	User POS Unit 4
Days	**Distribution Channel**	**Product Class**	**Description**	**Product Category**	**Description**	**Sales Event 3**	**Sales Event 4**
2019-01-03	DIR	B	Branded	200	Fresh Vegetables	150	737
2019-01-03	DIR	B	Branded	201	Canned Fruit	468	1,936
2019-01-03	DIR	B	Branded	202	Pork	75	438
2019-01-03	DIR	B	Branded	203	Beef	87	493
2019-01-03	DIR	B	Branded	204	Fresh Fruit	224	931
2019-01-03	DIR	B	Branded	207	Frozen Fruit Products	42	253
2019-01-03	DIR	B	Branded	208	Frozen Prepared Dinners	119	973
2019-01-03	DIR	O	Other	200	Fresh Vegetables	132	608
2019-01-03	DIR	O	Other	204	Fresh Fruit	22	45
2019-01-03	INB	B	Branded	200	Fresh Vegetables	313	1,593
2019-01-03	INB	B	Branded	201	Canned Fruit	2,109	12,616
2019-01-03	INB	B	Branded	202	Pork	184	1,183
2019-01-03	INB	B	Branded	203	Beef	108	601
2019-01-03	INB	B	Branded	204	Fresh Fruit	319	1,540
2019-01-03	INB	B	Branded	207	Frozen Fruit Products	85	608
2019-01-03	INB	B	Branded	208	Frozen Prepared Dinners	293	2,570
2019-01-03	INB	O	Other	200	Fresh Vegetables	113	545
2019-01-03	INB	O	Other	204	Fresh Fruit	28	65

Time Series File Example

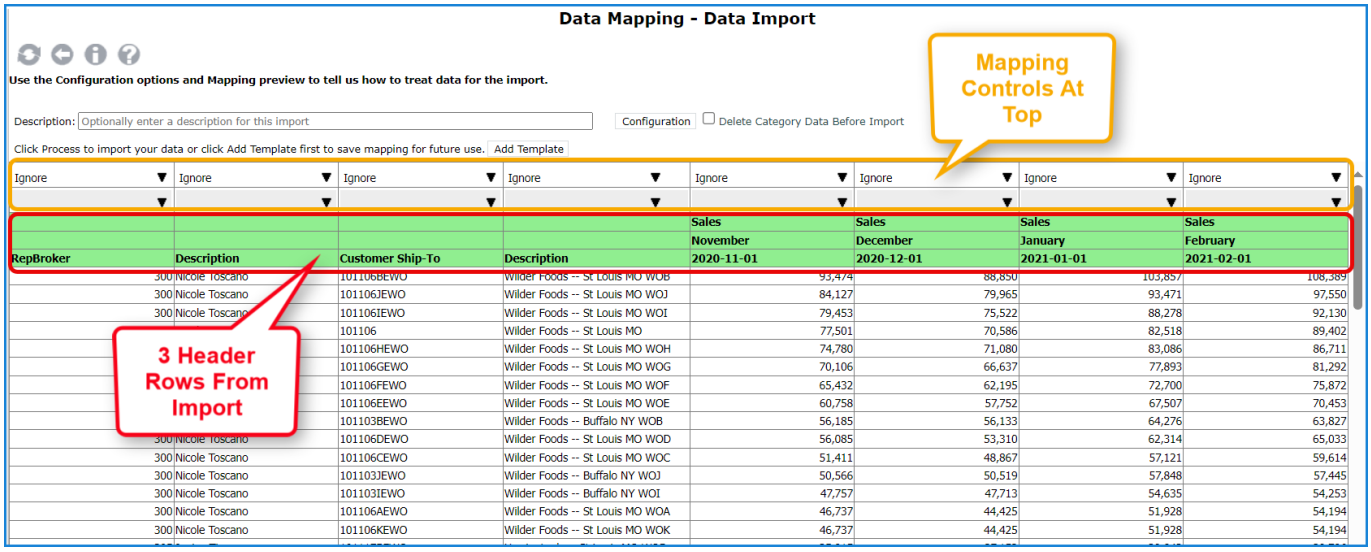
The next example import file has sales data that will be imported to populate a forecast. There are three header rows at the top. Each column of measure data is for a different transaction date. The transaction dates are in the third header row. RepBroker and Customer Ship-To are the dimensions in the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

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



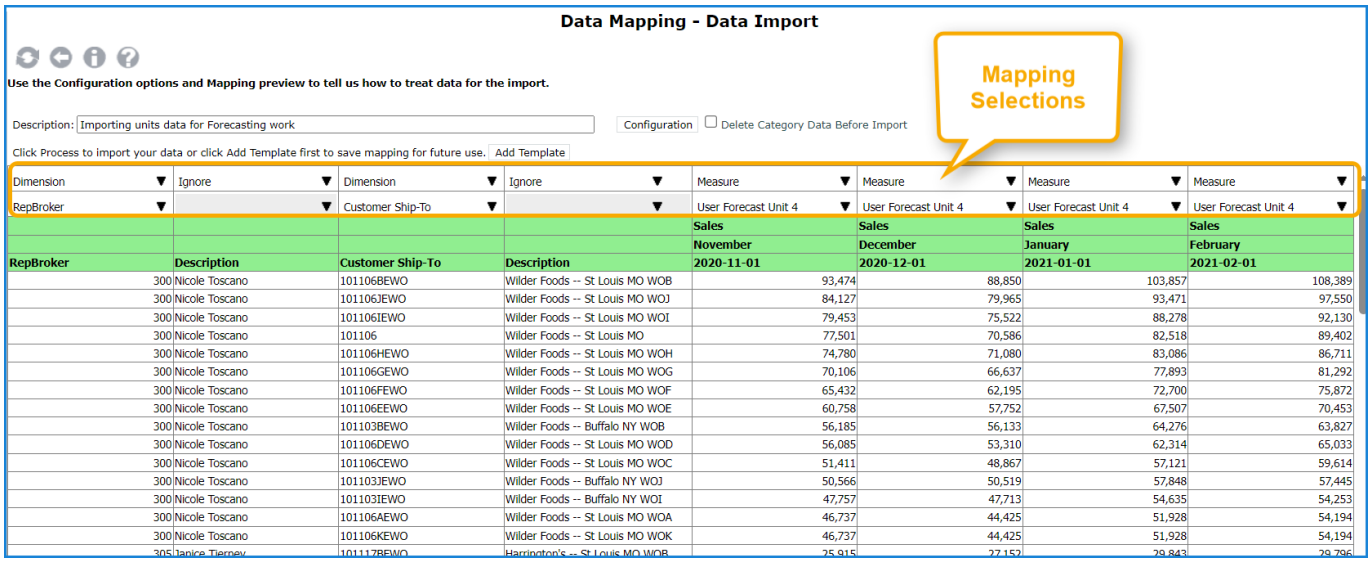
	A	B	C	D	E	F	G	H
1					Sales	Sales	Sales	Sales
2					November	December	January	February
3	RepBroker	Description	Customer Ship-To	Description	2020-11-01	2020-12-01	2021-01-01	2021-02-01
4	300	Nicole Toscano	101106BEWO	Wilder Foods -- St Louis MO WOB	93,474	86,850	103,857	108,389
5	300	Nicole Tosc	101106JEWO	Wilder Foods -- St Louis MO WOJ	84,127	79,965	93,471	97,550
6	300		101106IEWO	Wilder Foods -- St Louis MO WOI	79,453	75,522	88,278	92,130
7	300		101106	Wilder Foods -- St Louis MO	77,50		82,518	89,402
8	300		101106HEWO	Wilder Foods -- St Louis MO WOH	74,78		83,086	86,711
9	300		101106GEWO	Wilder Foods -- St Louis MO WOG	70,10		77,893	81,292
10	300		101106FEWO	Wilder Foods -- St Louis MO WOF	65,43		72,700	75,872
11	300	Nicole Toscano	101106EEWO	Wilder Foods -- St Louis MO WOE	60,756		67,507	70,453
12	300	Nicole Toscano	101103BEWO	Wilder Foods -- Buffalo NY WOB	56,185	56,133	64,276	63,827
13	300	Nicole Toscano	101106DEWO	Wilder Foods -- St Louis MO WOD	56,085	53,310	62,314	65,033
14	300	Nicole Toscano	101106CEWO	Wilder Foods -- St Louis MO WOC	51,411	48,867	57,121	59,614
15	300	Nicole Toscano	101103JEWO	Wilder Foods -- Buffalo NY WOJ	50,566	50,519	57,848	57,445
16	300	Nicole Toscano	101103IEWO	Wilder Foods -- Buffalo NY WOI	47,757	47,713	54,635	54,253
17	300	Nicole Toscano	101106AEWO	Wilder Foods -- St Louis MO WOA	46,737	44,425	51,928	54,194
18	300	Nicole Toscano	101106KEWO	Wilder Foods -- St Louis MO WOK	46,737	44,425	51,928	54,194
19	305	Janice Tierney	101117BEWO	Harrington's -- St Louis MO WOB	25,915	27,152	29,843	29,796
20	305	Janice Tierney	101117JEWO	Harrington's -- St Louis MO WOJ	23,324	24,437	26,859	26,816
21	305	Janice Tierney	101117IEWO	Harrington's -- St Louis MO WOI	22,028	23,079	25,366	25,327
22	305	Janice Tierney	101117HEWO	Harrington's -- St Louis MO WOH	20,732	21,721	23,874	23,837

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.



Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore
				Sales	Sales	Sales	Sales
				November	December	January	February
RepBroker	Description	Customer Ship-To	Description	2020-11-01	2020-12-01	2021-01-01	2021-02-01
300	Nicole Toscano	101106BEWO	Wilder Foods -- St Louis MO WOB	93,474	88,850	103,857	108,389
300	Nicole Toscano	101106JEWO	Wilder Foods -- St Louis MO WOJ	84,127	79,965	93,471	97,550
300	Nicole Toscano	101106IEWO	Wilder Foods -- St Louis MO WOI	79,453	75,522	88,278	92,130
		101106	Wilder Foods -- St Louis MO	77,501	70,586	82,518	89,402
		101106HEWO	Wilder Foods -- St Louis MO WOH	74,780	71,080	83,086	86,711
		101106GEWO	Wilder Foods -- St Louis MO WOG	70,106	66,637	77,893	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
		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

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.



Dimension	Ignore	Dimension	Ignore	Measure	Measure	Measure	Measure
RepBroker		Customer Ship-To		User Forecast Unit 4	User Forecast Unit 4	User Forecast Unit 4	User Forecast Unit 4
				Sales	Sales	Sales	Sales
				November	December	January	February
RepBroker	Description	Customer Ship-To	Description	2020-11-01	2020-12-01	2021-01-01	2021-02-01
300	Nicole Toscano	101106BEWO	Wilder Foods -- St Louis MO WOB	93,474	88,850	103,857	108,389
300	Nicole Toscano	101106JEWO	Wilder Foods -- St Louis MO WOJ	84,127	79,965	93,471	97,550
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300	Nicole Toscano	101106	Wilder Foods -- St Louis MO	77,501	70,586	82,518	89,402
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	62,195	72,700	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 Foods -- St Louis MO WOD	56,085	53,310	62,314	65,033
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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 WOB	25,915	27,152	29,843	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 Data Import Initial Setup Checklist. Then, Data Imports can be added and processed by users.

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

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

2. Stratum.Connector and Stratum.Viewer must be upgraded to version 7.4 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.

3. The Stratum.Viewer implementation must have a valid license for the Stratum Analyst Hub. If you want to have Data Steward 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 info@silvon.com.

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 Specify Upload Location.
   - 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 No-Reply@silvoncloud.com 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.

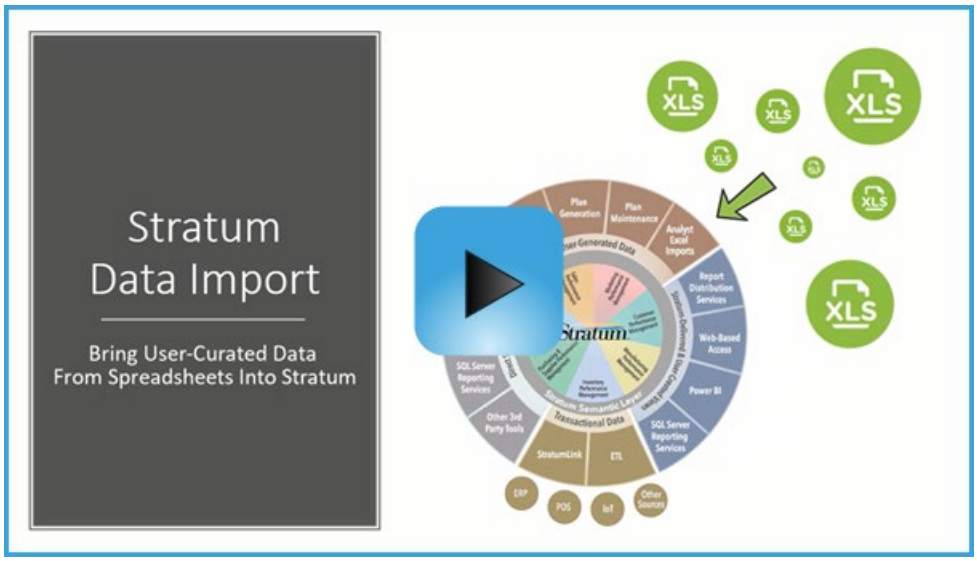
2. **Stratum.Viewer Category Control** – Categories that will be the Target of Data Imports need to be specified as ‘Enhanced’ Categories. Only measures belonging to those categories can have data imported into them via Data Import, either by users or Data Stewards. See Make Categories Available For Use With Data Import.

3. **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. See Enable Data Steward Features For Security Administrators.

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.
3. Use the Data Import Upload File Location property to specify the path for the folder that will be used by Data Imports. The Data Import location is used when importing values into Data Steward or User Controlled Measures.
   - When specifying the location, use the full UNC path format \\host-name\share-name\file_path\ and include a backslash mark \ as the final character. For example:
     \\serverabc\User Controlled Data\Uploaded Import Files\
   - The location must be one that exists already and one to which your implementation's Viewer Impersonation account has access rights.
4. Save  the changes.

Tasks – Using Data Import Features

Add a Data Import – Excel, CSV, Text Data Source

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

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

2. In the Data Import list window, click New  . 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 Import Configuration window 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 Data Mapping window 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  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 Data Import list window, 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 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 Import Configuration window 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 Data Mapping window 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 Data Import list window, 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 Import Configuration window 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 Data Mapping window 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  icon.

Add a Data Import Template

When you are adding a new data import, you can optionally set up a template 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 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 Data Import list window, select the Data Import you need to delete.
3. Click Delete  .
4. Click Yes in the prompt that displays to proceed with the deletion.

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 Data Import Templates list window, 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 icon in its mapping window. A message will display asking you to confirm you want to proceed with the import. Click OK to proceed.

OR

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

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

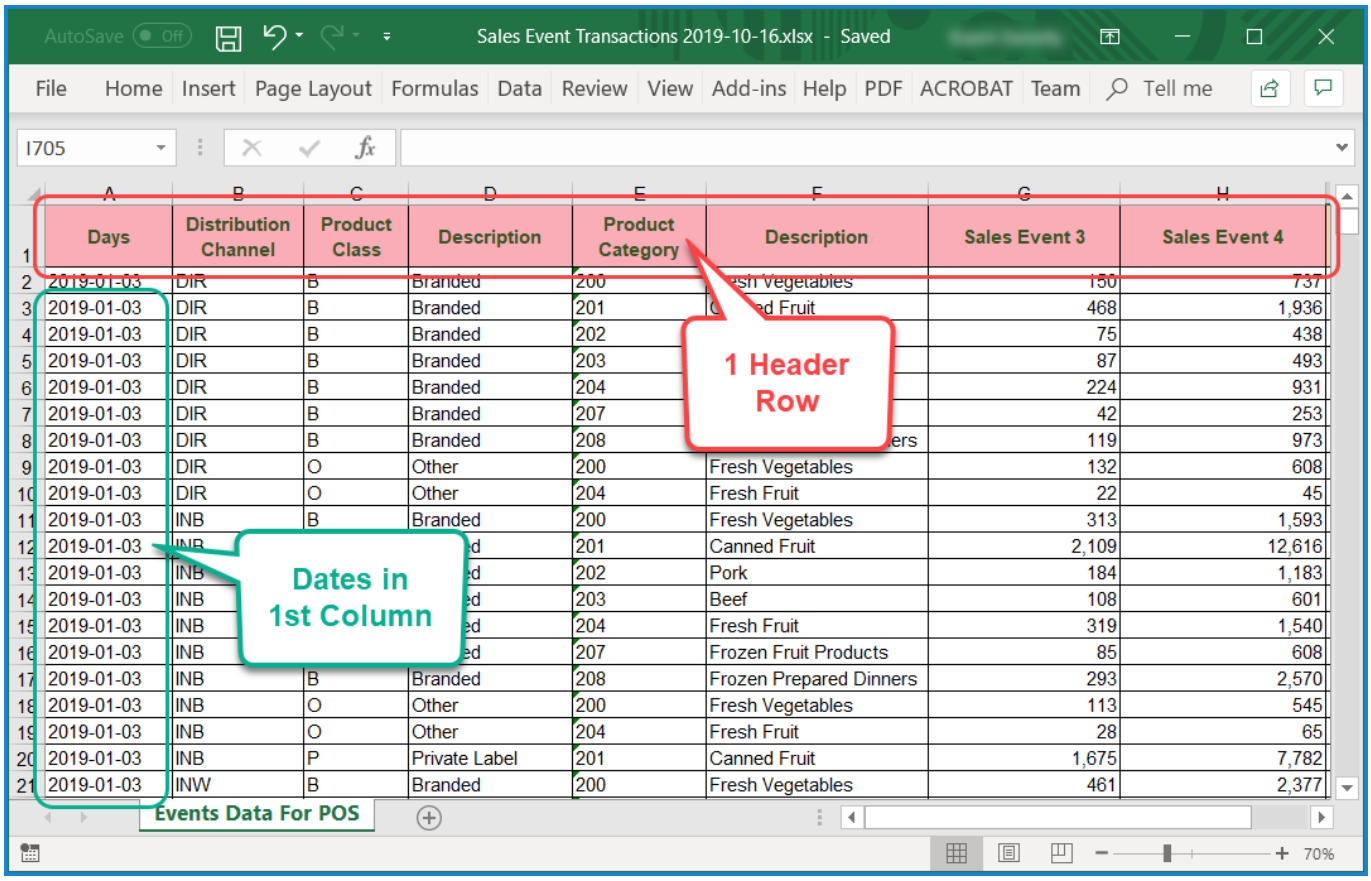
One way to set up your Excel spreadsheet import file is to include the transaction dates for your import data in a single column of the file. This type of import is known as a Transactions import file and means you will set the import configuration properties to the Transaction type. The following import 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 How It Works: Stratum Data Import and the topic Excel Import File Types: Transactions Or Time Series. 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

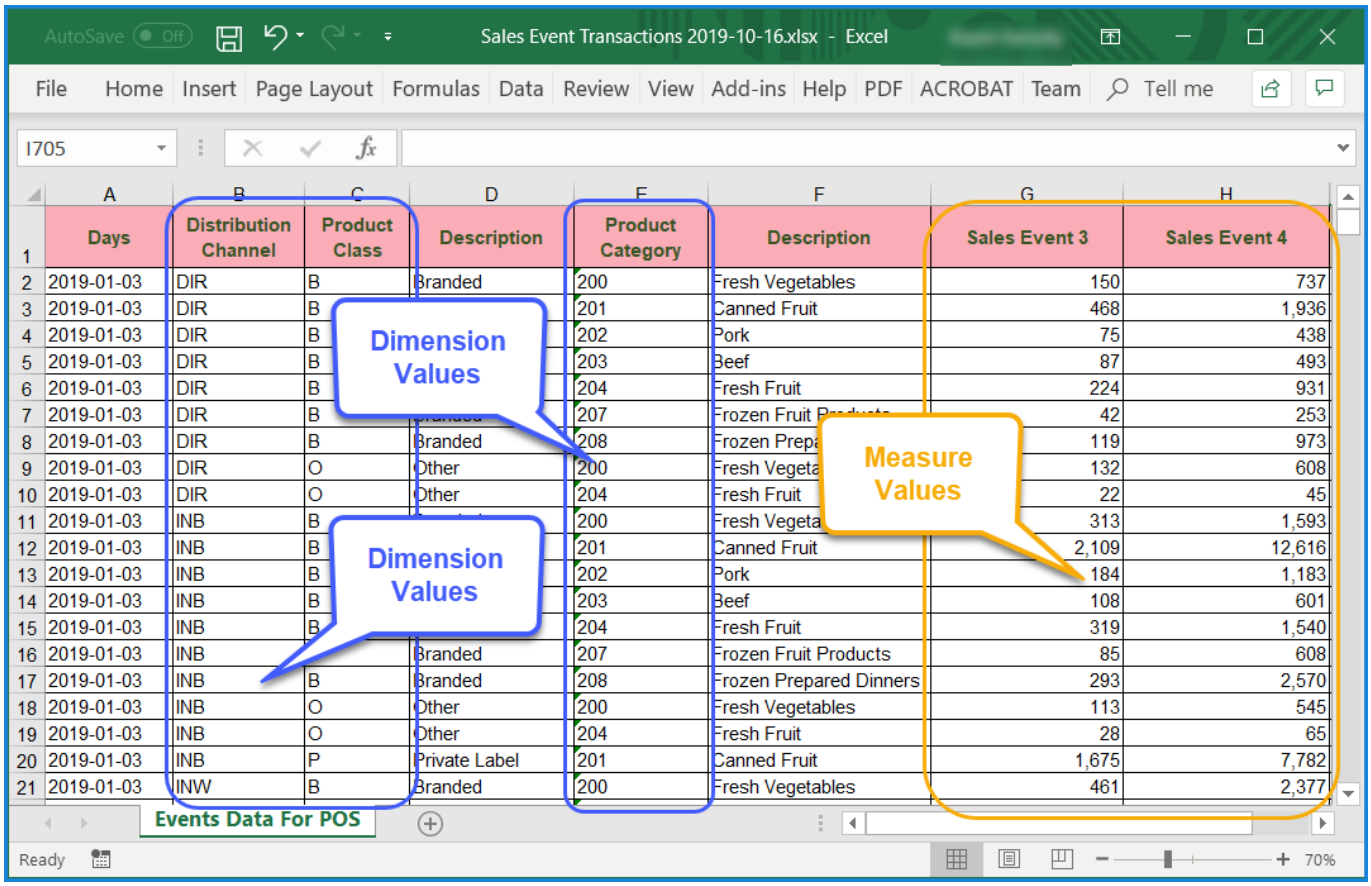
This import file's transaction dates are in the first column, and the column was given a heading of "Days" in a header row at the top. Header rows have descriptive information that aid in mapping the import data to Stratum data – but information in the header rows don't get imported. You can include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



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

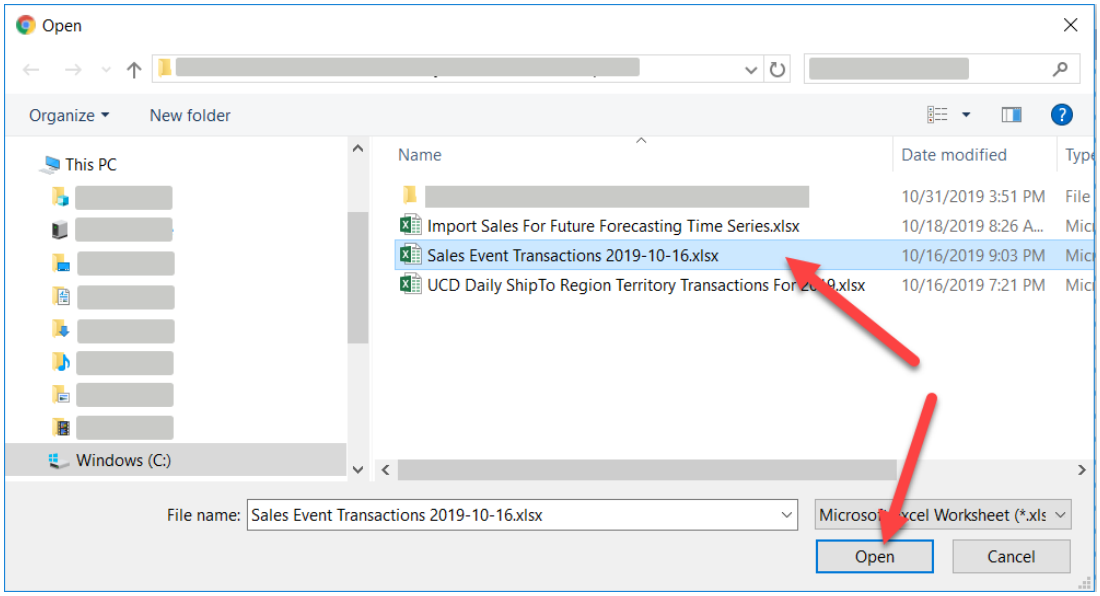
The transaction date tells Data Import the year and period each row of data belongs when it is imported into Stratum. The other columns in the file contain dimension values that tell Data Import where the imported data belongs and contain the actual measure values that will get imported for those dimensions.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



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

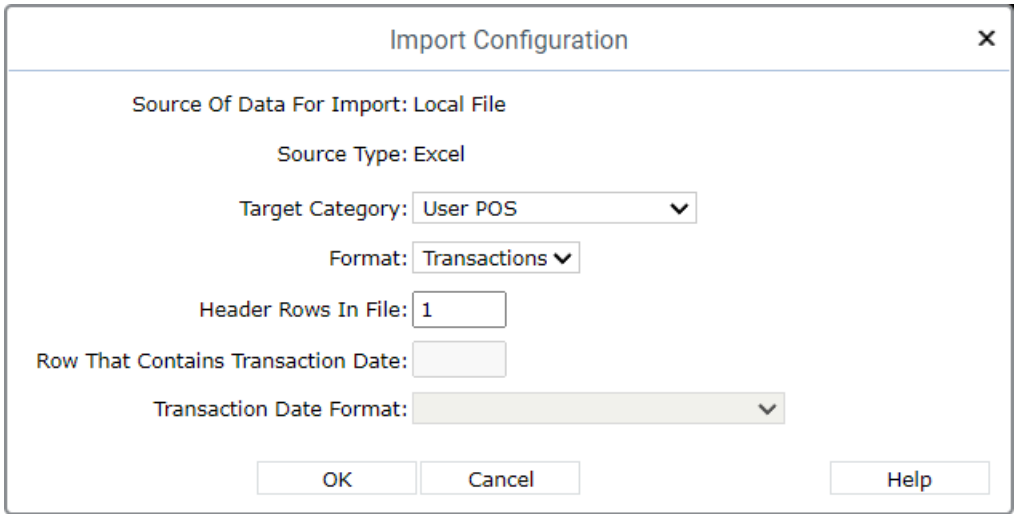
2. *Open File & Set Up Import Properties*

An import starts with choosing the Excel file.



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

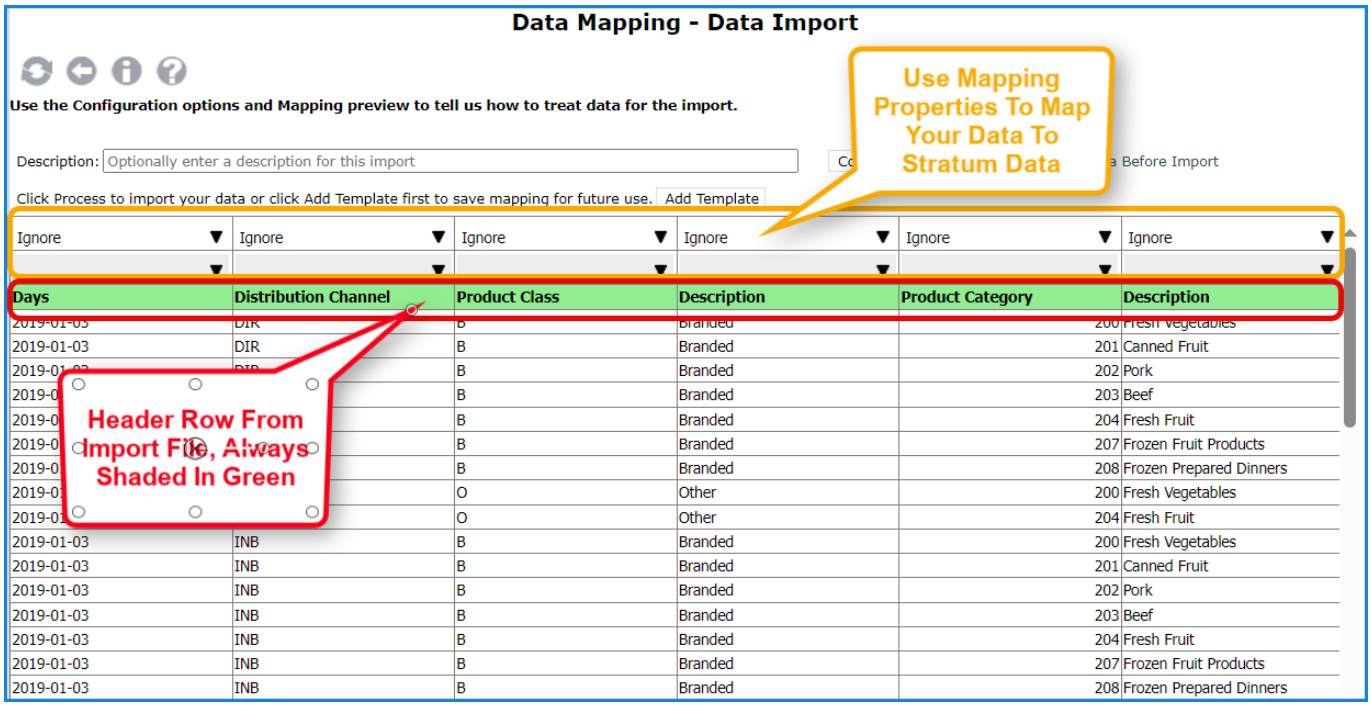
Since dates are in every row in this example, type is left at the default of Transactions. There is only one header row in this file, so that property is left at the default of 1. The date format matches the default setting too, so there was nothing to change there.



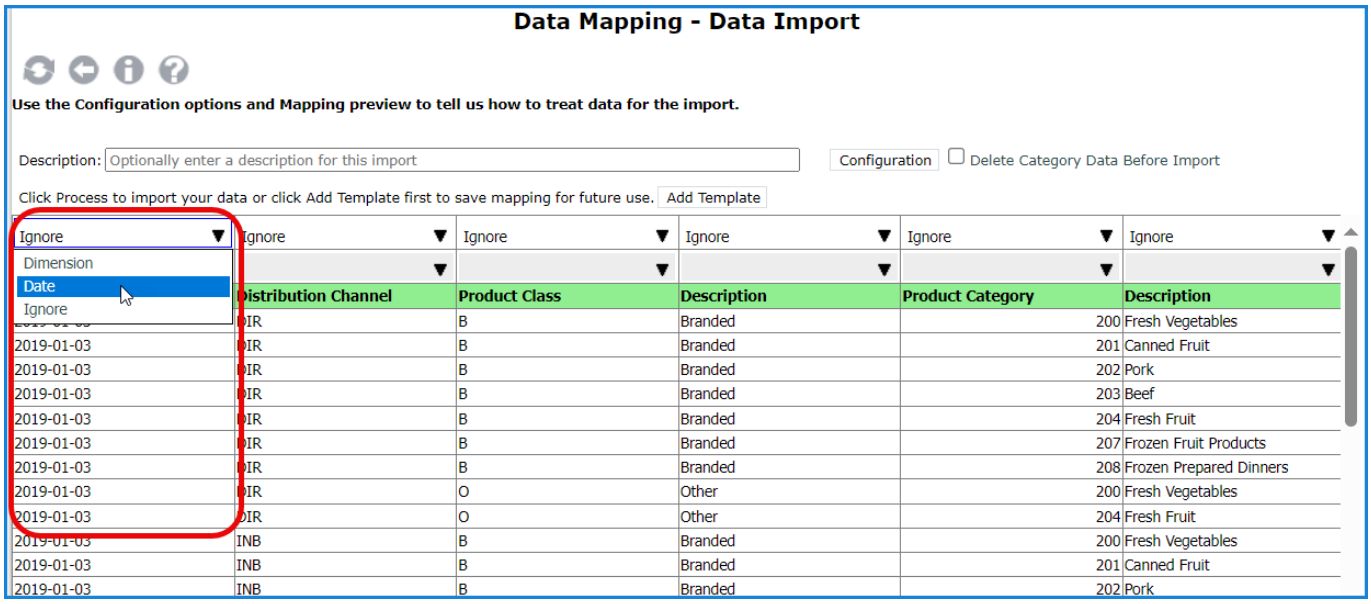
3. Map To Stratum Data

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

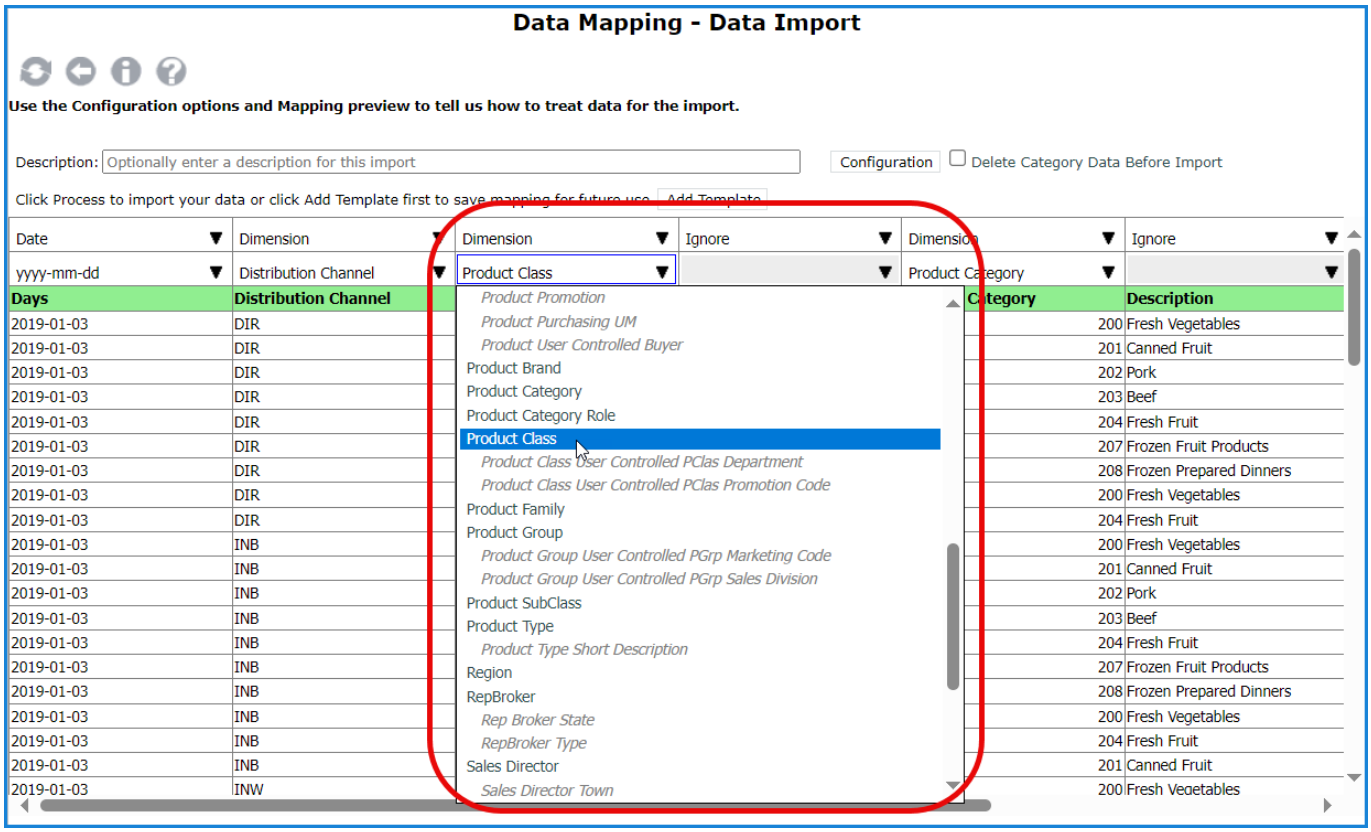
Note: As you do imports over time, Data Import will make some mapping selections for you automatically based on past patterns of what was imported and where it got imported.



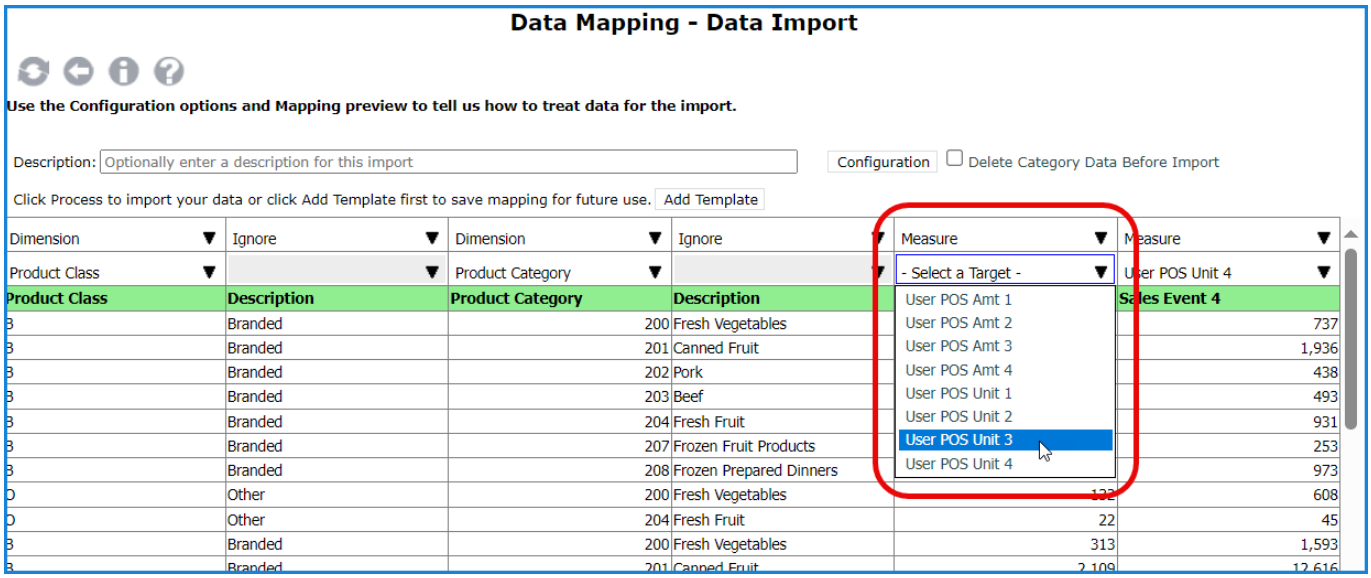
The drop-down lists above the header row are used to identify columns as dates, dimensions, and measures. Columns that don't need to be imported should be set to Ignore. Here's the date column being mapped.



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

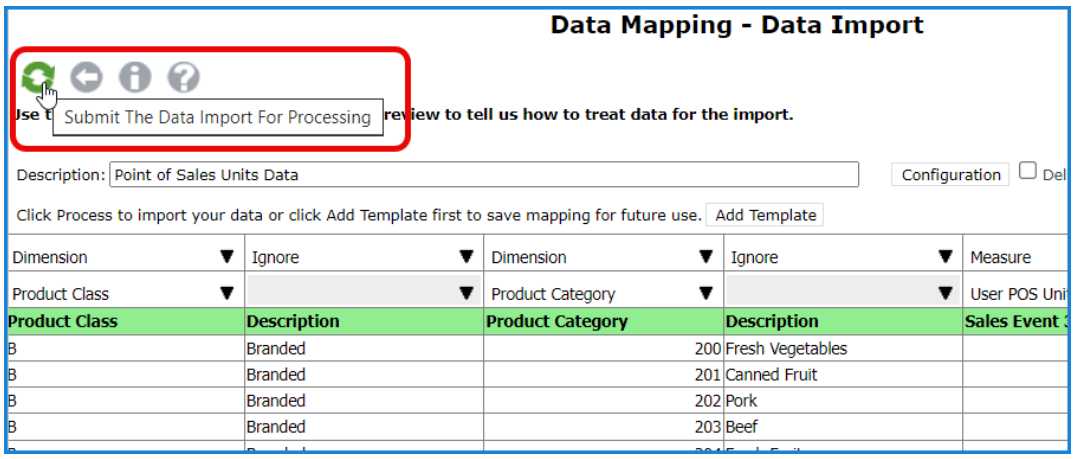


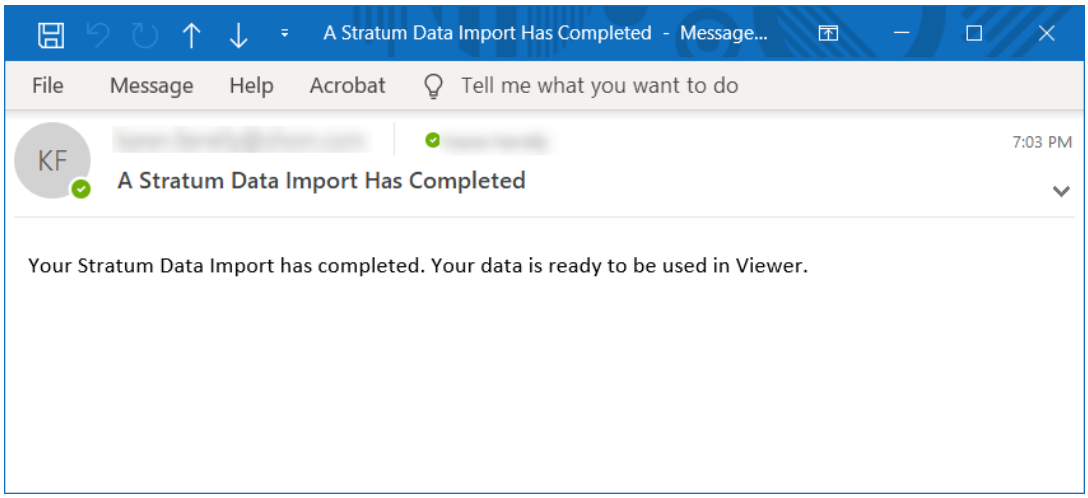
The columns containing dimension descriptions are set to ignore. Finally, here are the measure values being mapped to User POS measures from the Target User POS category.



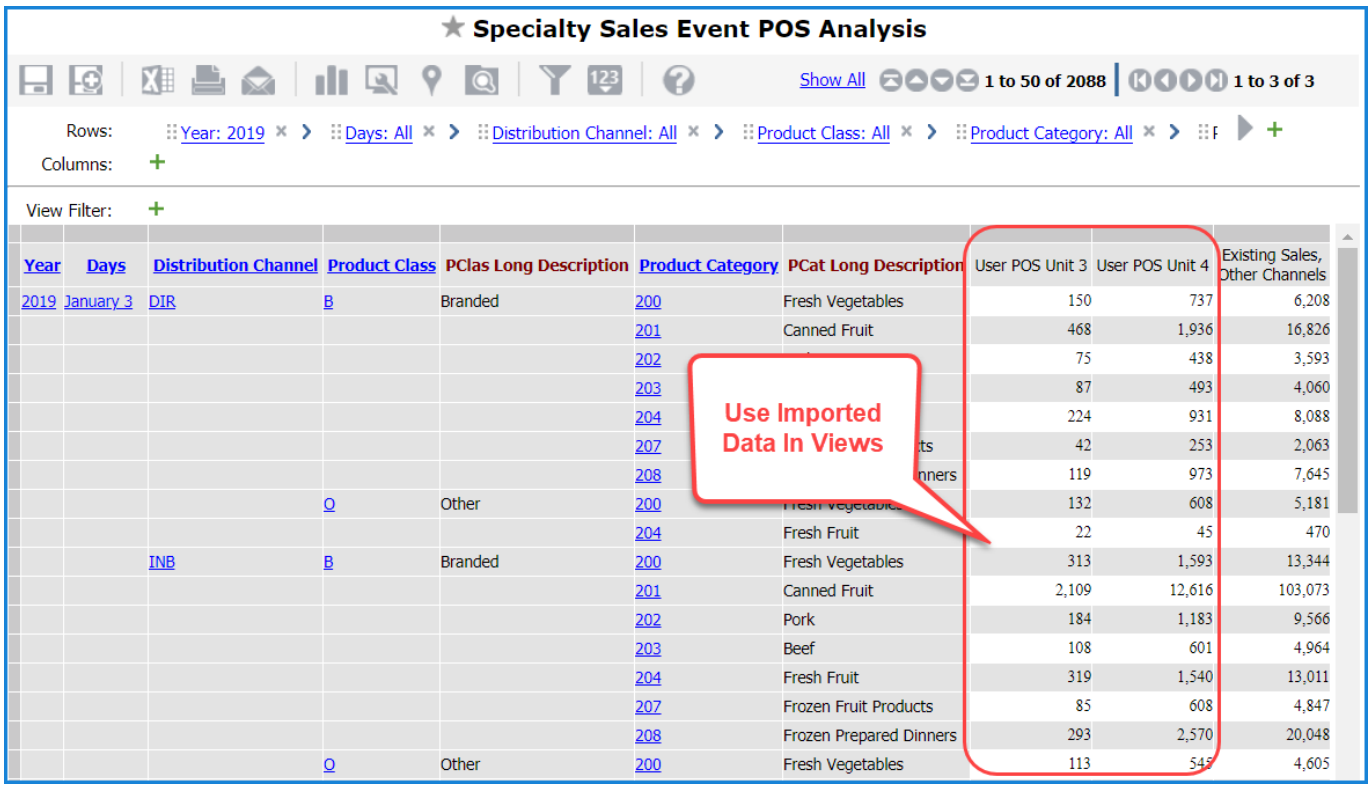
4. Use Data In Stratum

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





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



Year	Days	Distribution Channel	Product Class	PClas Long Description	Product Category	PCat Long Description	User POS Unit 3	User POS Unit 4	Existing Sales, Other Channels
2019	January 3	DIR	B	Branded	200	Fresh Vegetables	150	737	6,208
					201	Canned Fruit	468	1,936	16,826
					202		75	438	3,593
					203		87	493	4,060
					204		224	931	8,088
					207		42	253	2,063
					208		119	973	7,645
			O	Other	200		132	608	5,181
					204	Fresh Fruit	22	45	470
		INB	B	Branded	200	Fresh Vegetables	313	1,593	13,344
					201	Canned Fruit	2,109	12,616	103,073
					202	Pork	184	1,183	9,566
					203	Beef	108	601	4,964
					204	Fresh Fruit	319	1,540	13,011
					207	Frozen Fruit Products	85	608	4,847
					208	Frozen Prepared Dinners	293	2,570	20,048
			O	Other	200	Fresh Vegetables	113	543	4,605

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

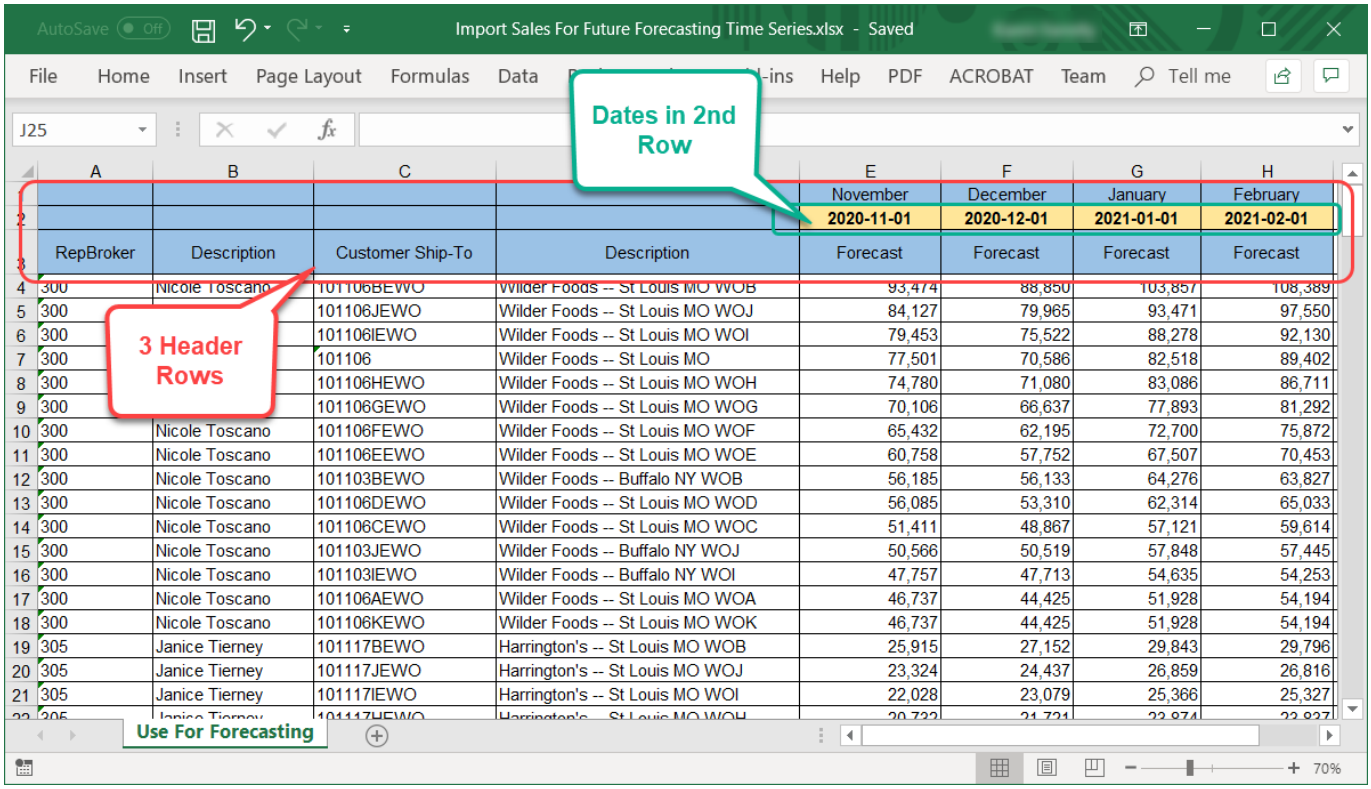
One way to arrange data in your import file is to include the transaction dates for your data in a header row at the top of the file, above the columns that contain measure values you plan to import. This type of import is known as a Time Series import file and means you will set the import configuration 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 How It Works: Stratum Data Import and the topic Excel Import File Types: Transactions Or Time Series. 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

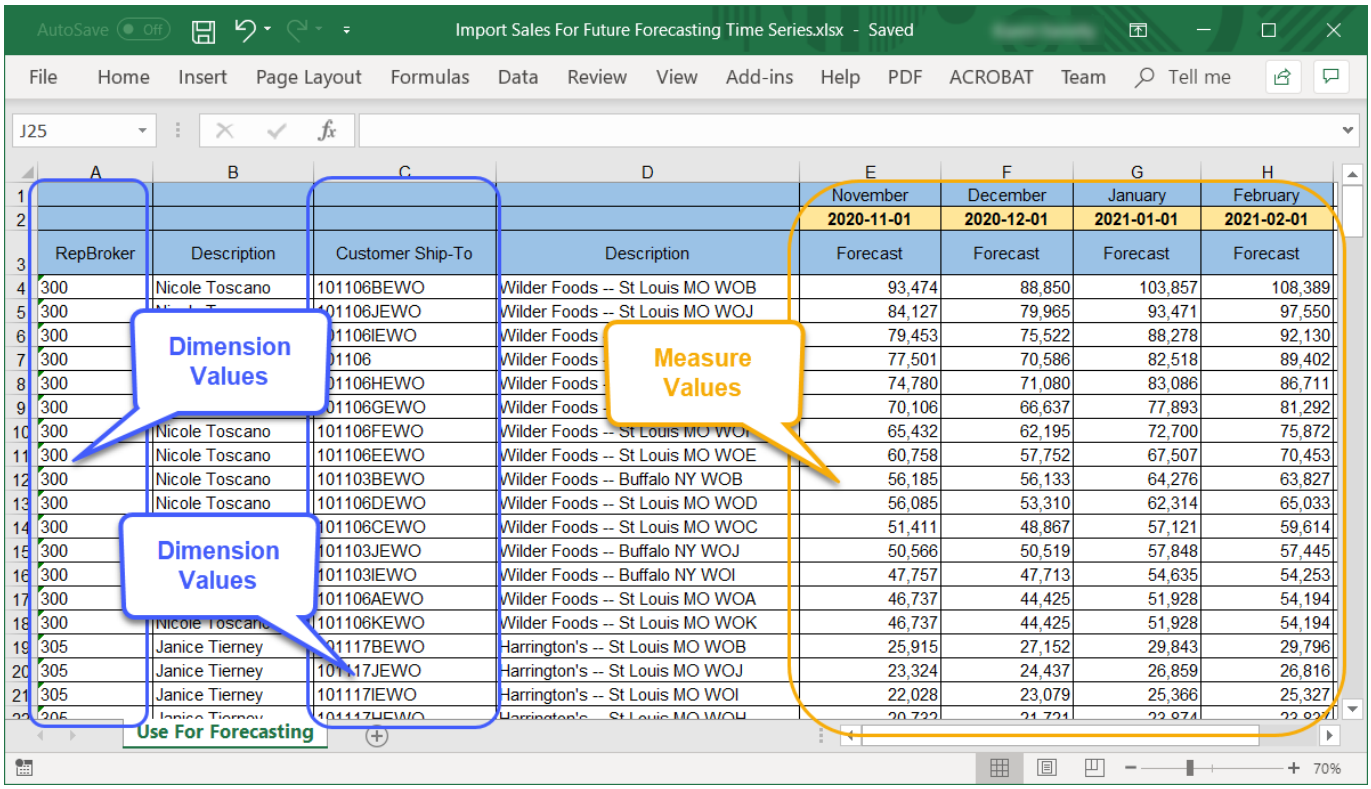
This import file has the transaction dates in the second header row. There must be a date over each column that contains measure data. The rows above and below the date row also are header rows. They have descriptive information that aids in mapping the import data to Stratum data. You can include more 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.

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



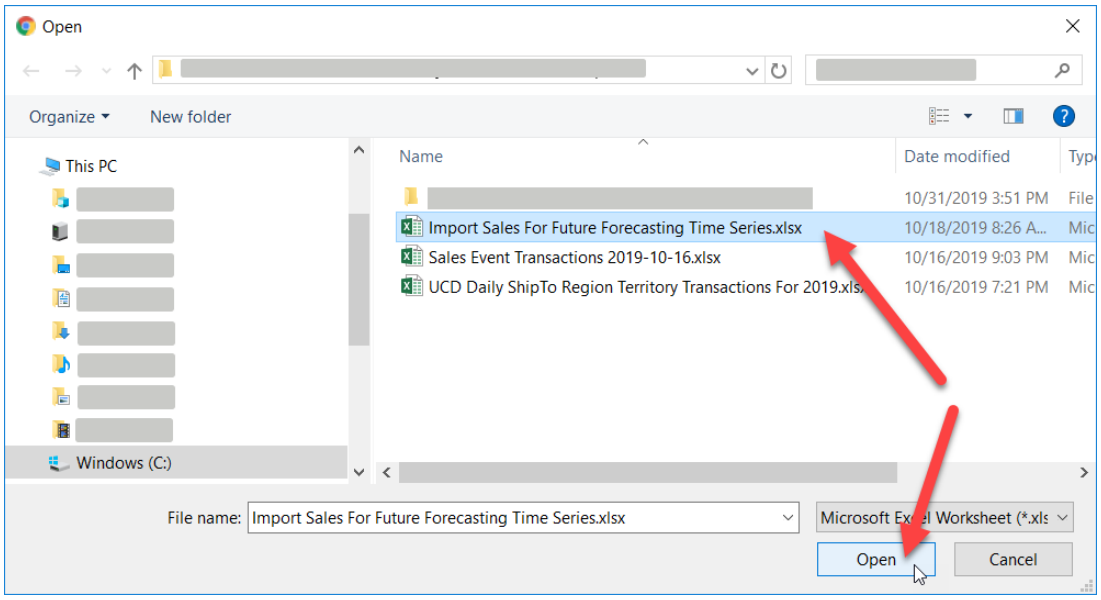
	A	B	C	D	E	F	G	H
1					November	December	January	February
2					2020-11-01	2020-12-01	2021-01-01	2021-02-01
3	RepBroker	Description	Customer Ship-To	Description	Forecast	Forecast	Forecast	Forecast
4	300	Nicole Toscano	101106BEWO	Wilder Foods -- St Louis MO WOB	93,474	88,850	103,857	108,389
5	300		101106JEWO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

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



2. Open File & Set Up Import Properties

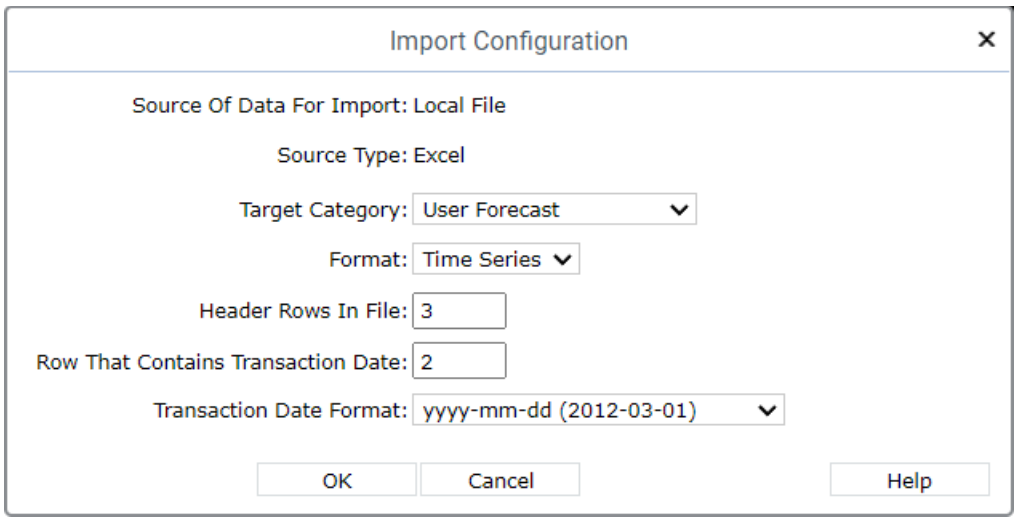
An import starts with choosing the Excel file.



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

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

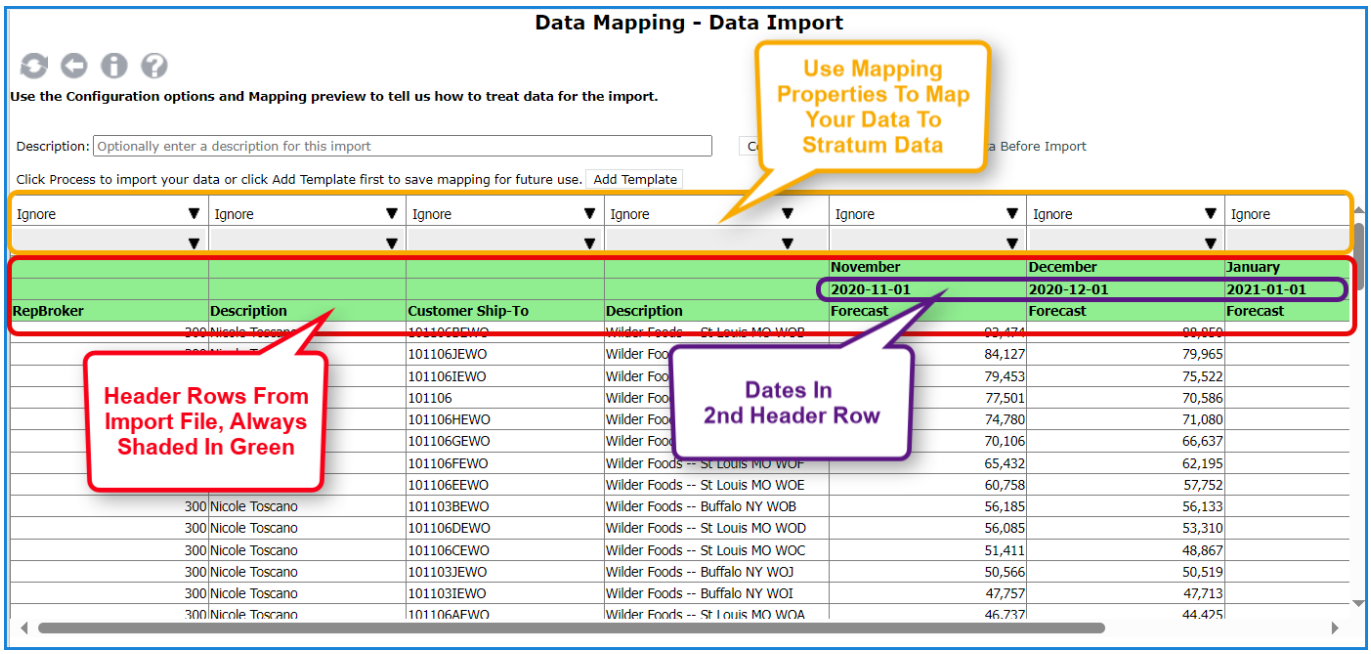
since transaction dates are in the second header row of this import file. The date format matches the default so that property is left as is.



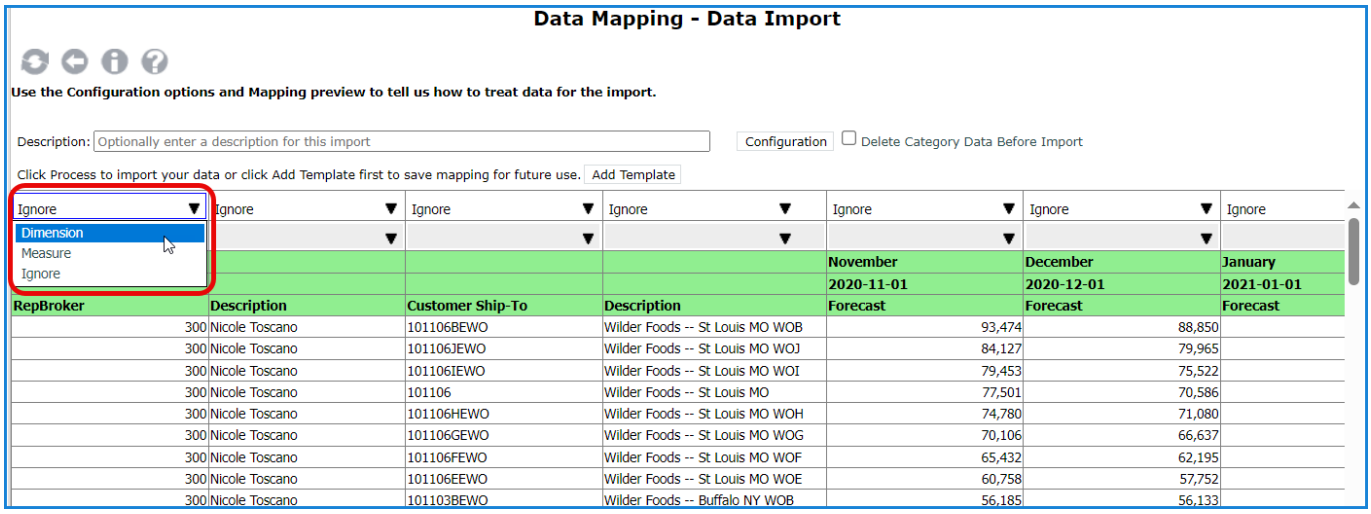
3. Map To Stratum Data

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

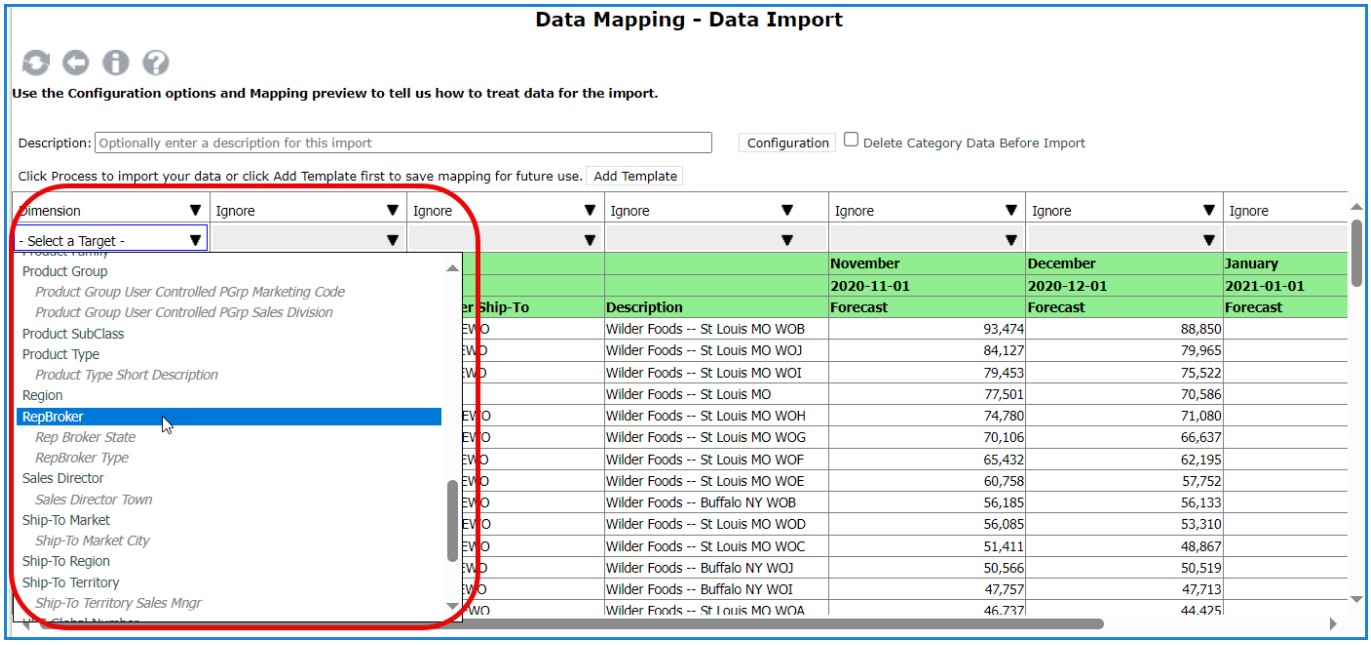
Note: As you do imports over time, Data Import will make some mapping selections for you automatically based on past patterns of what was imported and where it got imported.



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

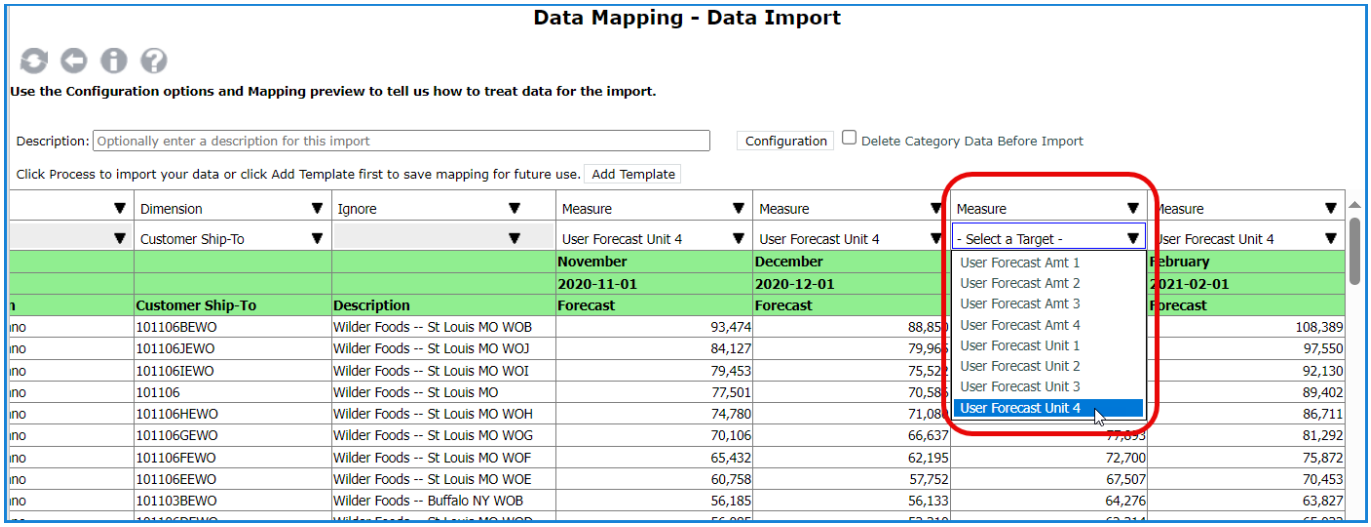


Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore
				November	December	January
				2020-11-01	2020-12-01	2021-01-01
RepBroker	Description	Customer Ship-To	Description	Forecast	Forecast	Forecast
300	Nicole Toscano	101106BEWO	Wilder Foods -- St Louis MO WOB	93,474	88,850	
300	Nicole Toscano	101106JEWO	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	



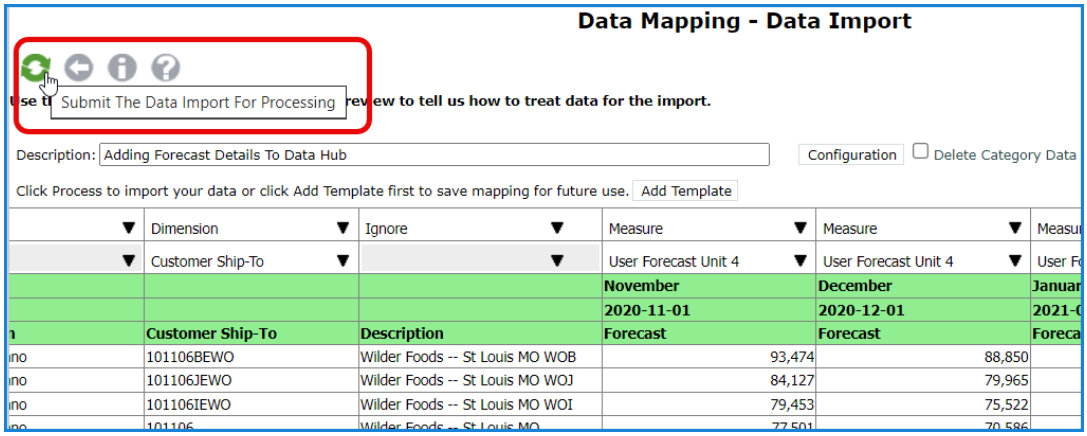
Dimension	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore
- Select a Target -						
				November	December	January
				2020-11-01	2020-12-01	2021-01-01
		Ship-To	Description	Forecast	Forecast	Forecast
		EWO	Wilder Foods -- St Louis MO WOB	93,474	88,850	
		EWO	Wilder Foods -- St Louis MO WOJ	84,127	79,965	
		EWO	Wilder Foods -- St Louis MO WOI	79,453	75,522	
			Wilder Foods -- St Louis MO	77,501	70,586	
		EWO	Wilder Foods -- St Louis MO WOH	74,780	71,080	
		EWO	Wilder Foods -- St Louis MO WOG	70,106	66,637	
		EWO	Wilder Foods -- St Louis MO WOF	65,432	62,195	
		EWO	Wilder Foods -- St Louis MO WOE	60,758	57,752	
		EWO	Wilder Foods -- Buffalo NY WOB	56,185	56,133	
		EWO	Wilder Foods -- St Louis MO WOD	56,085	53,310	
		EWO	Wilder Foods -- St Louis MO WOC	51,411	48,867	
		EWO	Wilder Foods -- Buffalo NY WOJ	50,566	50,519	
		EWO	Wilder Foods -- Buffalo NY WOI	47,757	47,713	
		EWO	Wilder Foods -- St Louis MO WOA	46,737	44,425	

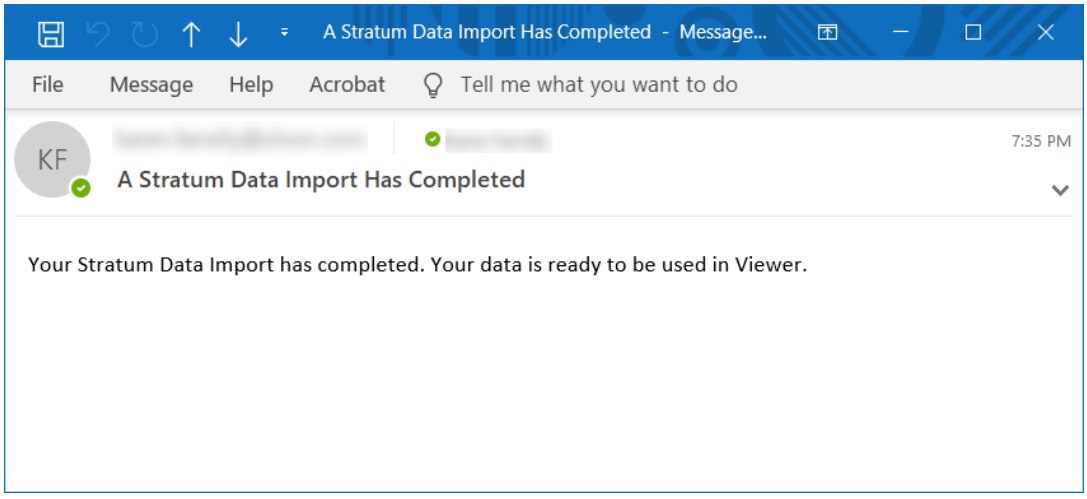
The columns containing dimension descriptions are set to Ignore. Finally, here are the measure values being mapped to User Forecast measures in the Target User Forecast category.



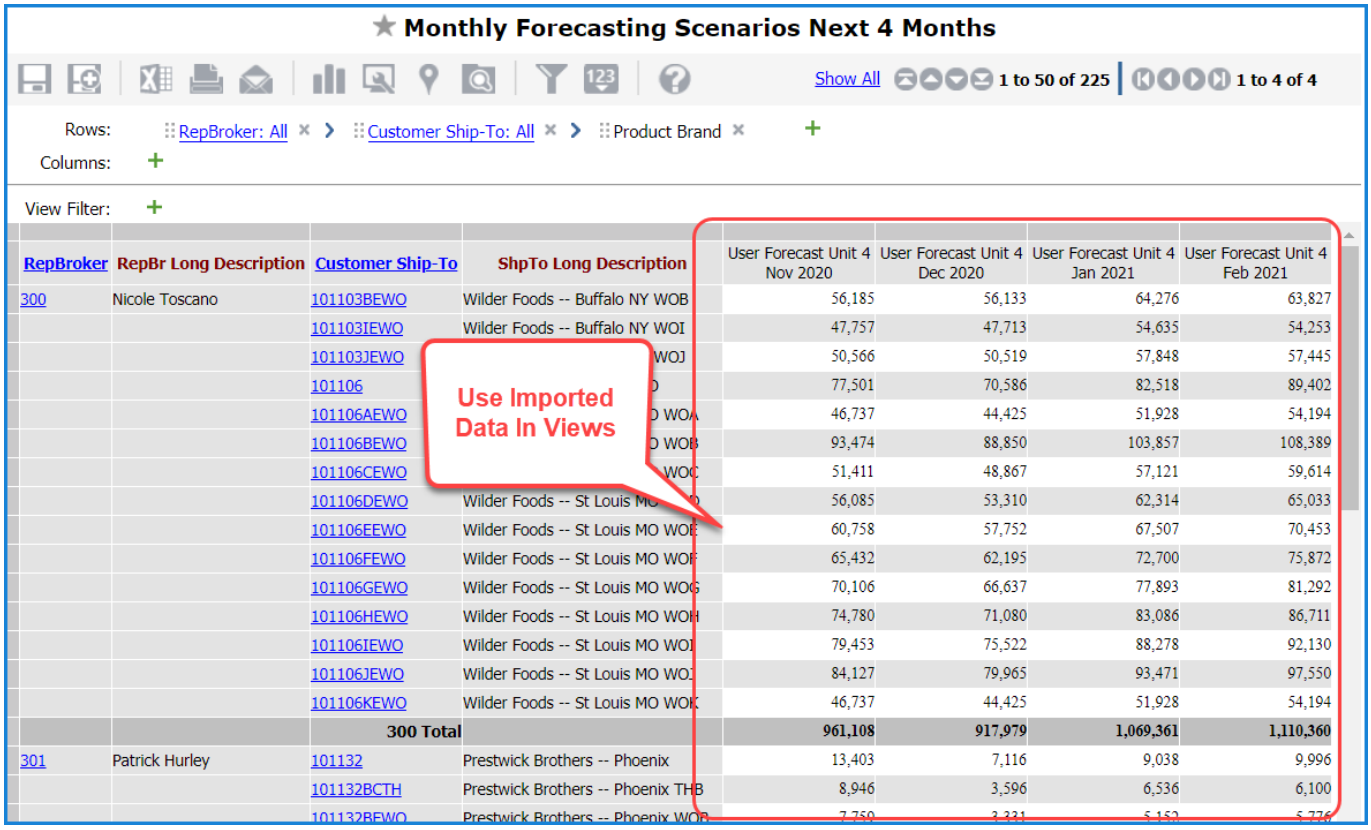
4. Use Data In Stratum

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





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



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

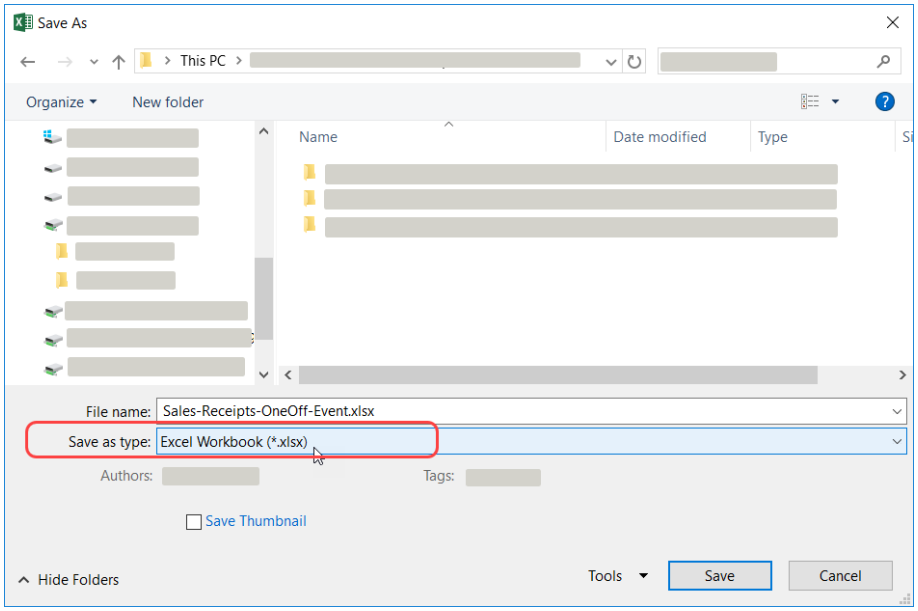
Tips For Setting Up Your Excel Imports

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 Tips 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.



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

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

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

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

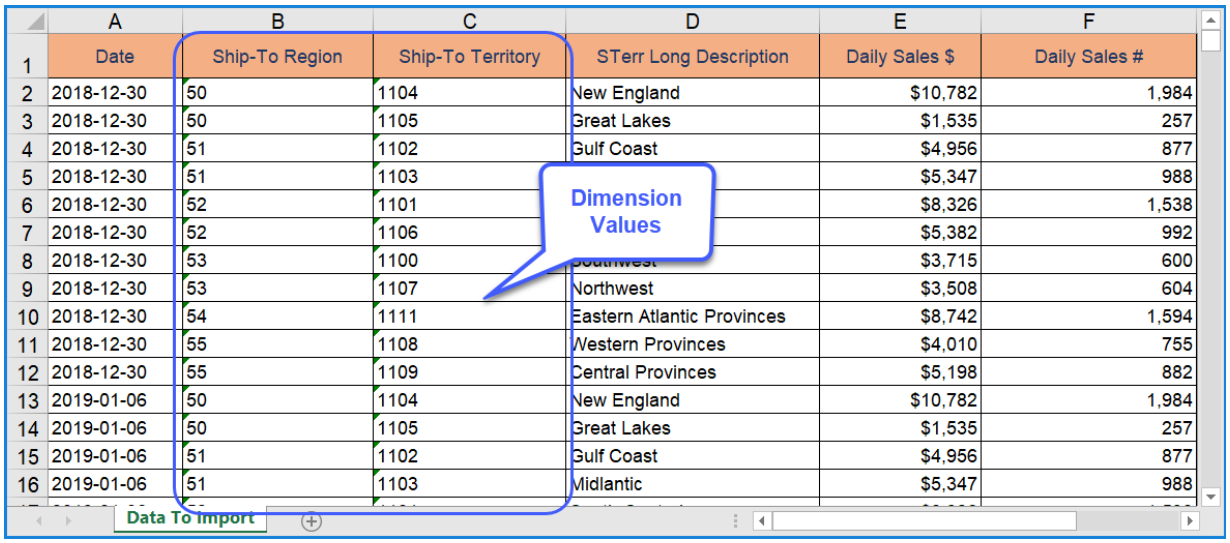
Dates

Data To 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)

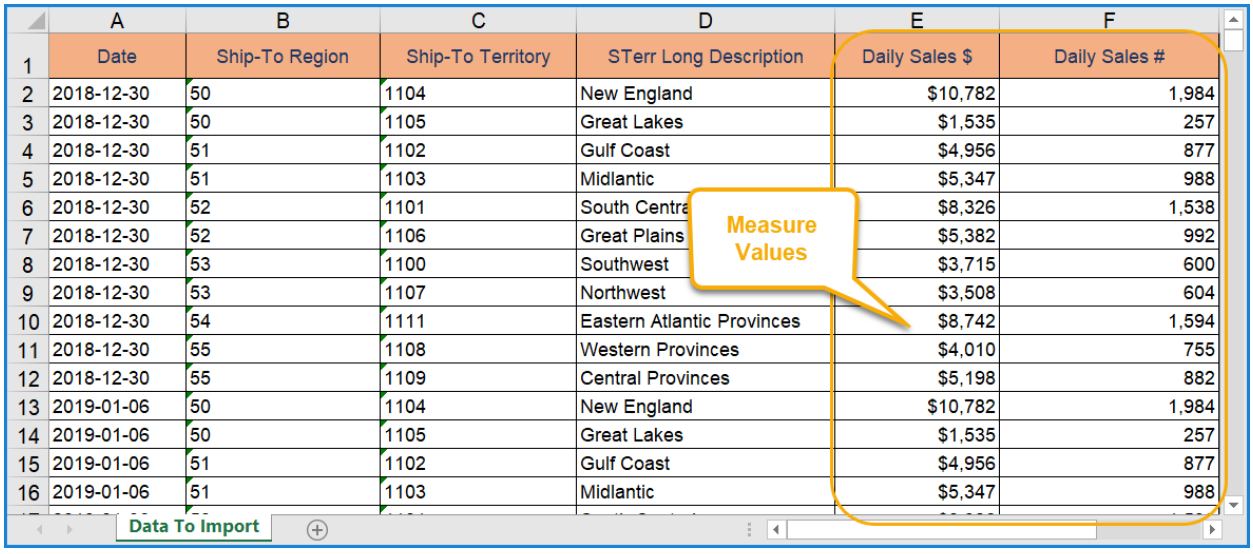
- **Dimensions** – Dimensions tell Data Import where measure data belongs when it is imported. Examples of dimensions are Product, UPC, and Customer Ship-To. Dimension columns must contain the dimension values and not descriptive info (also known as PUF's or attribute relationships). If your import contains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



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

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

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



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

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

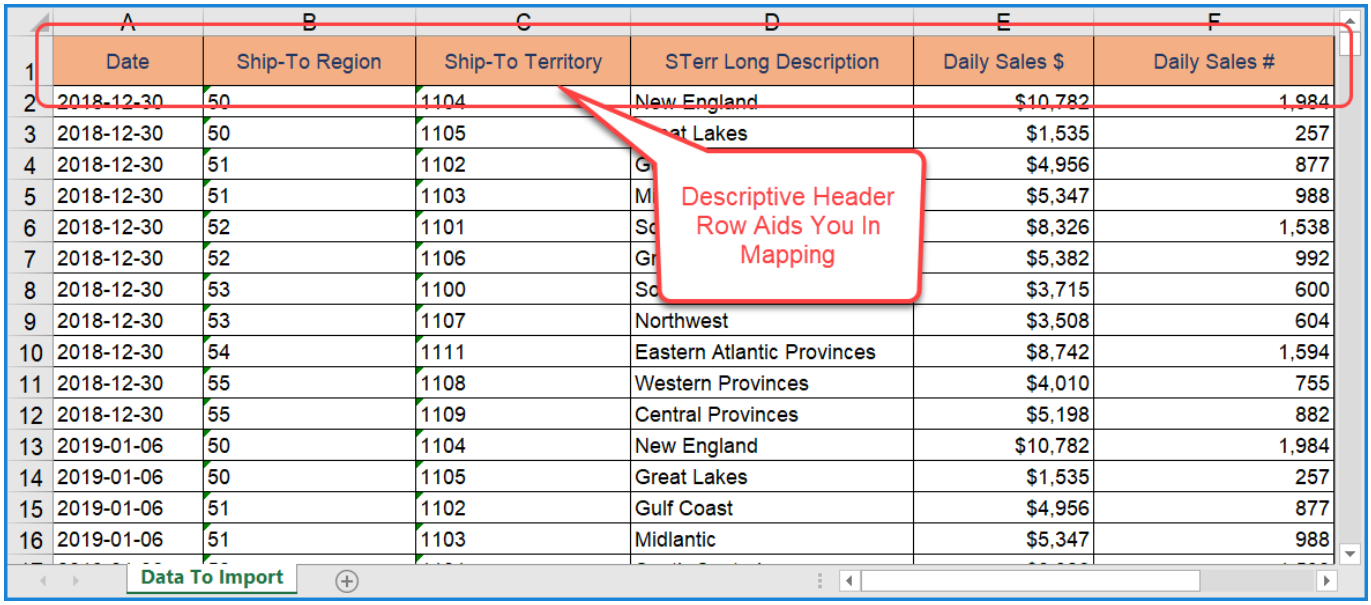
- For imports where dates are in every row (known as a Transactions type import), make sure each set of measure values you plan to import is contained in its own dedicated column and not spread across multiple columns. For example, put all sales amount data in a single column and all sales units in a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

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

Identifying information about the data contained in each column of your file can be included in the header row(s) of your import file. They help 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.

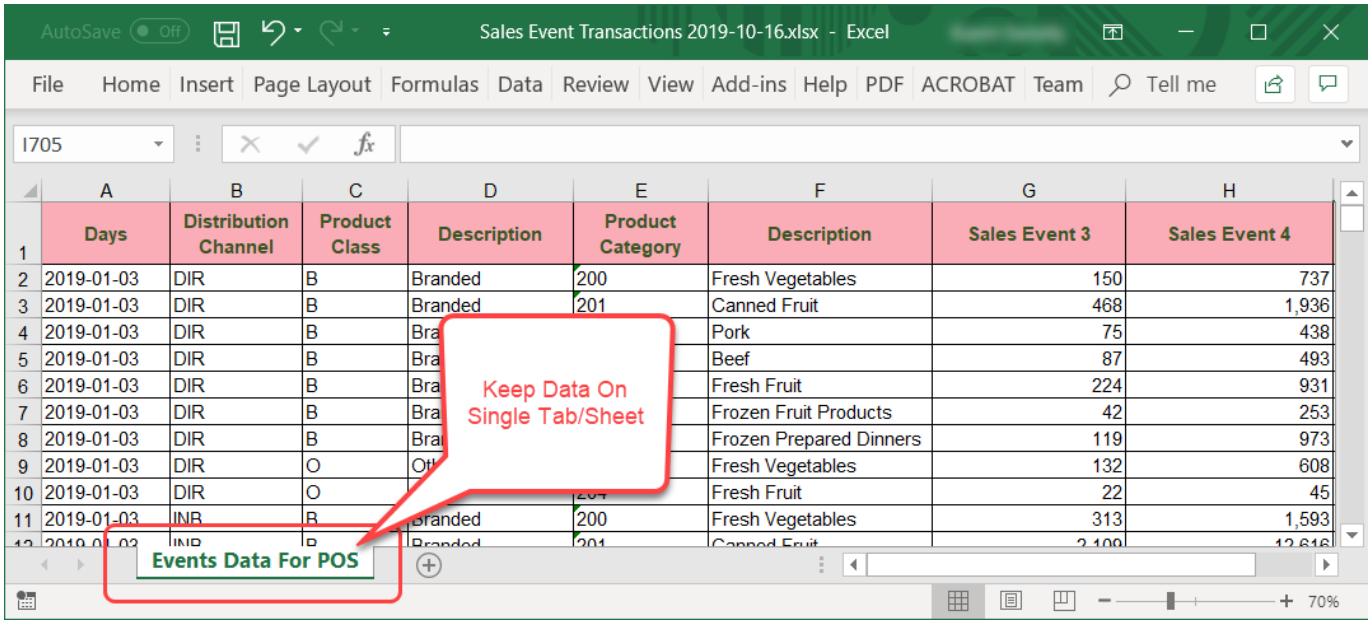
Tip: Using the word "Date" in the header of the column that contains the transaction date helps Data Import automatically map that column as a date column.



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

Keep Data On Single Worksheet or Tab

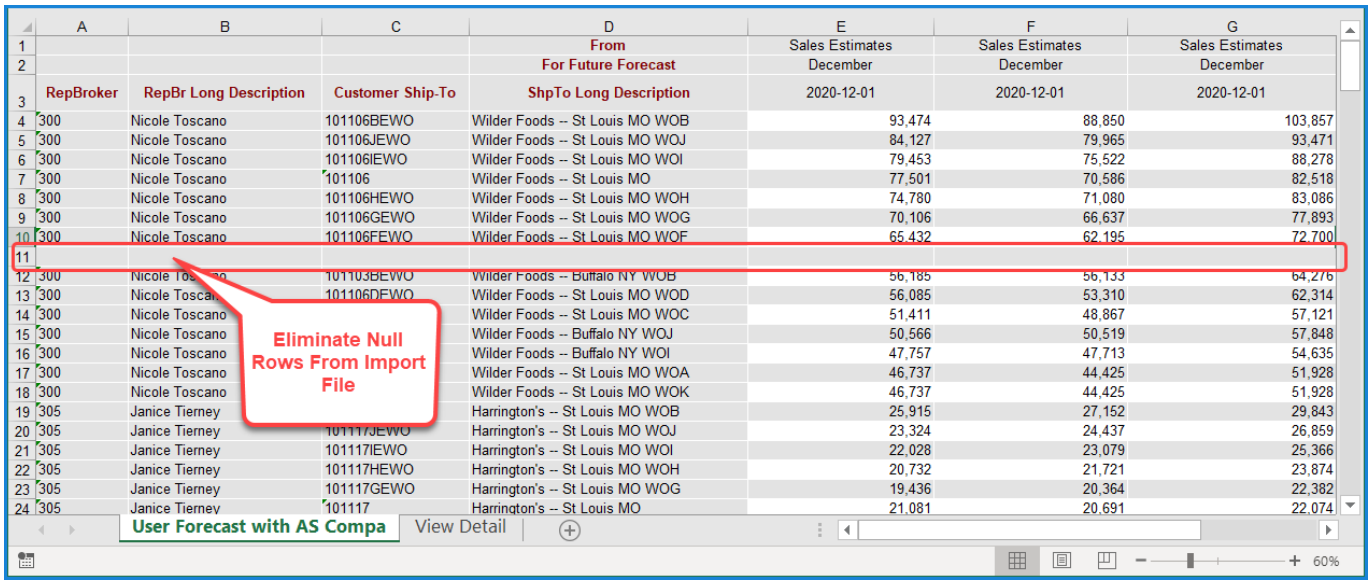
The data for your import needs to be in the first worksheet or tab of your import file. Only the first worksheet or tab is considered by Data Import and all others are ignored.



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

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

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



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

Exclude Unnecessary Extras

Certain types of information should be excluded either because 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.**
    - "All Others" rows or columns related to filtering.
    - Conditional format icons or formatting.
    - Charts.
    - Hyperlinks.
    - Calculated measure items that return images.
    - Pop-up labels on measure items.
    - Drilldown views linked up to rows, columns, or measure items.
- Also consider excluding specialty Excel items like the items listed below.
    - Images.
    - Charts.
    - Cell borders.
    - Comments or notes.
    - Excel features such as Pivot tables and text boxes.

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 Tips For Setting Up Your Excel Imports.

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 "Dates" 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.

2. Transaction date columns must be Date, DatTime, or String. See the "Dates" 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.

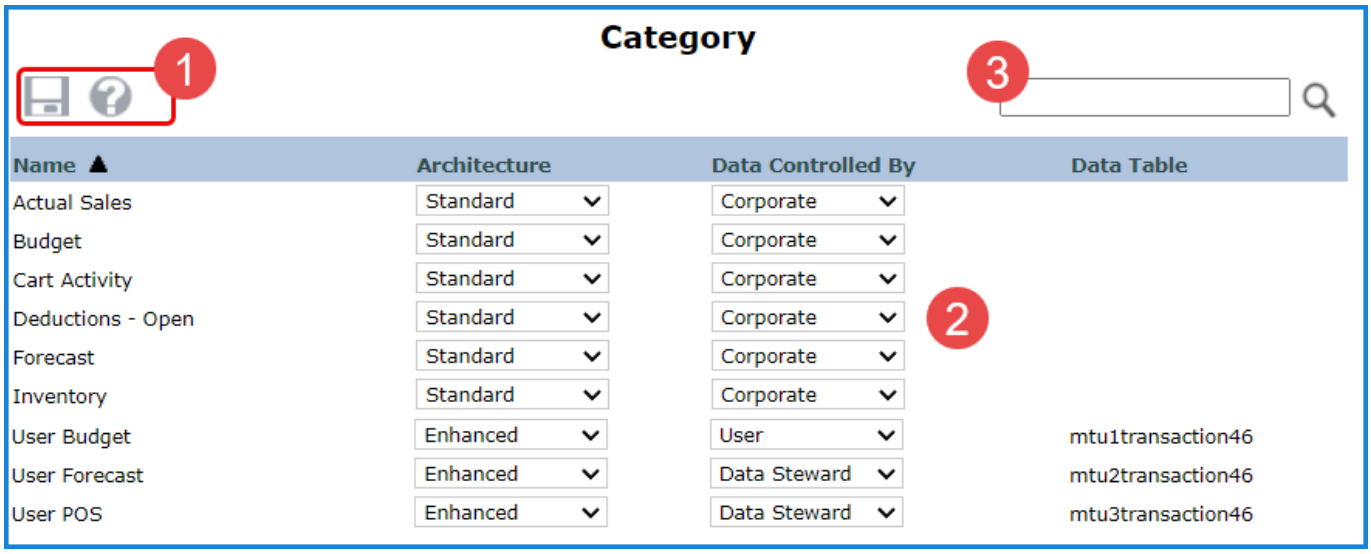
Exclude Unnecessary Extras Like Totals

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



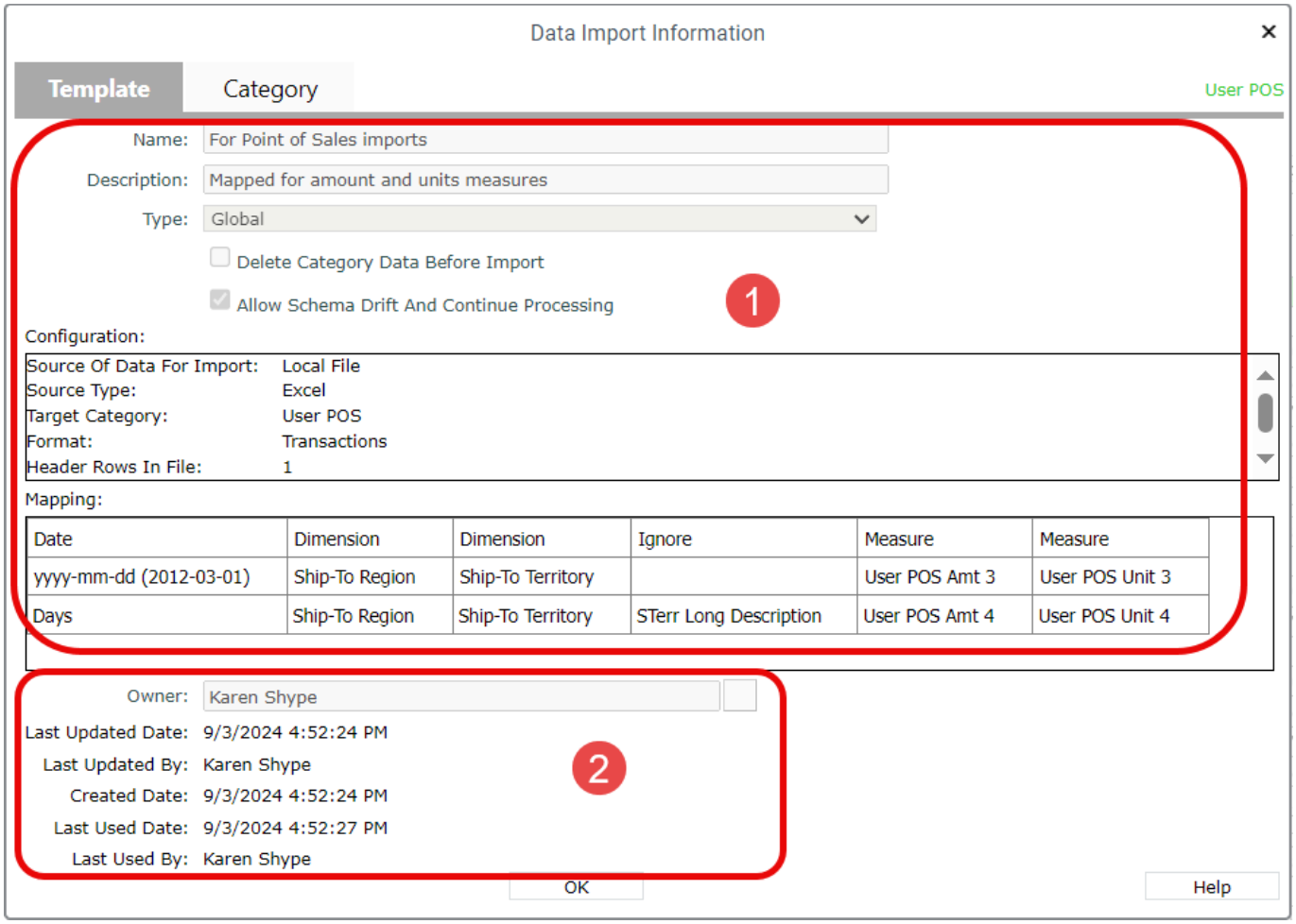
1	**Toolbar -** • **Save** - Click to save changes made to categories. • **Help** - Click to open help that is specific to managing categories.
2	Categories for your Stratum environment show in this window.* Their status in this window determines which sources of data can be used for them. Details follow. **'Standard' as Architecture and 'Corporate' as Data Controlled By** – This type of data is typically from corporate business systems such as Order Entry, ERP or CRM and is usually controlled by IT. For example, measures from 'Corporate' controlled categories can be used with Data Copy functionality, which allows users to copy Stratum data from one measure to another measure. **'Enhanced' as Architecture** – This type can have data controlled by the user community, either by general users or Data Steward administrators. For these categories, users can import data from corporate business systems as well as external data sources such as demographics, housing trends, or other unique data that will complement your Stratum data. For example, measures from 'Enhanced ' categories can be used with Data Import functionality, which allows users to import measure data from Excel spreadsheets or other sources of data. • If the Enhanced category is set to **Data Steward**, only Security Administrators with a Data Steward designation can import data to that category. • If the Enhanced category is set to **User**, any user with access to using Data Import can import data to that category. **Data Table –** This column is only populated with information when a category has been designated as Enhanced. The column shows the name of a fact table that is specific to that category and its Data Import transaction data. Tables are part of the Stratum Server database.

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

Data Import Information Window

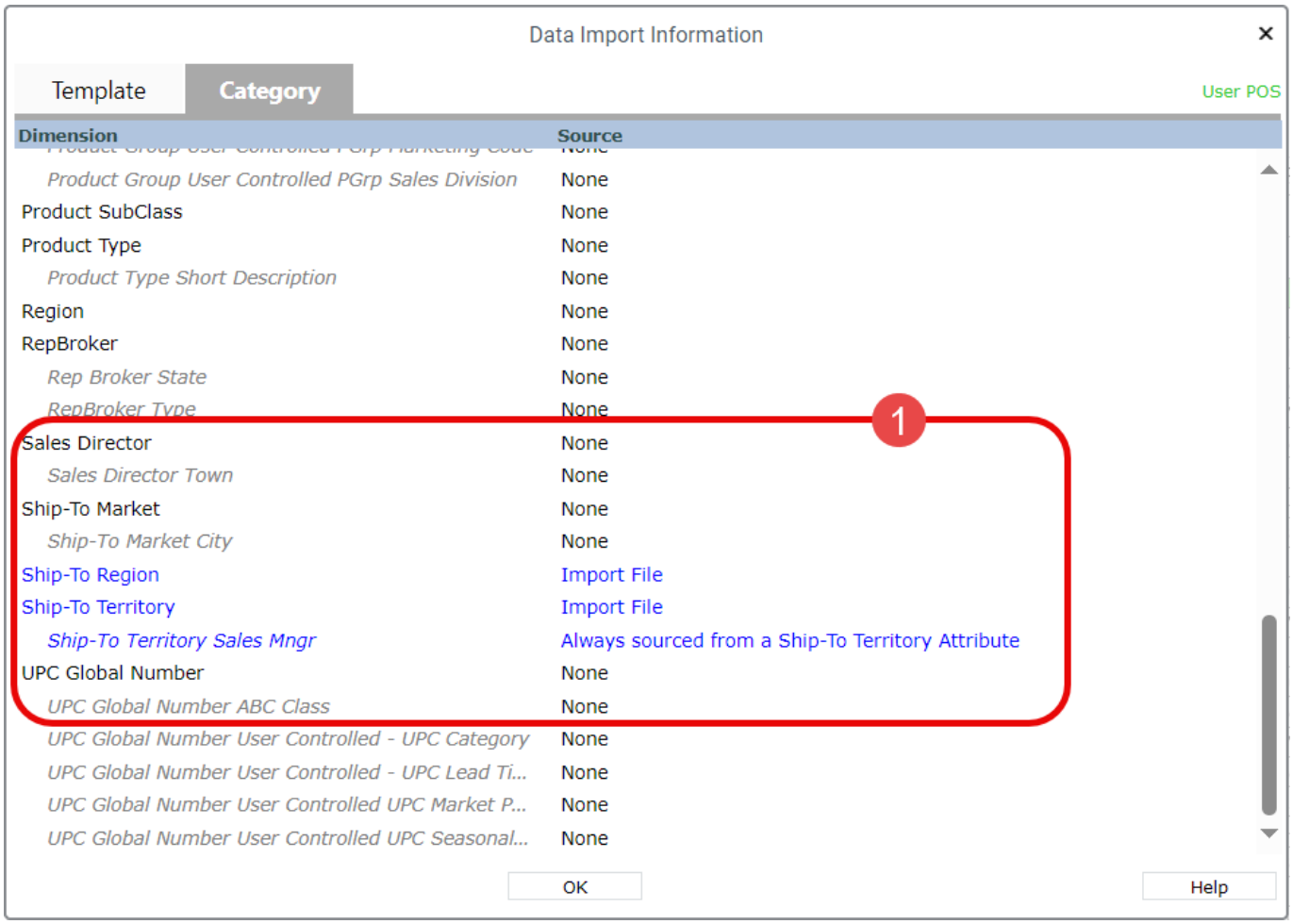
This window has two tabs if your import uses a Data Import template. It only has one tab, the Category tab, if a template wasn't used. Both tabs are described after their images that follow.

Template Tab



1	**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.
2	**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



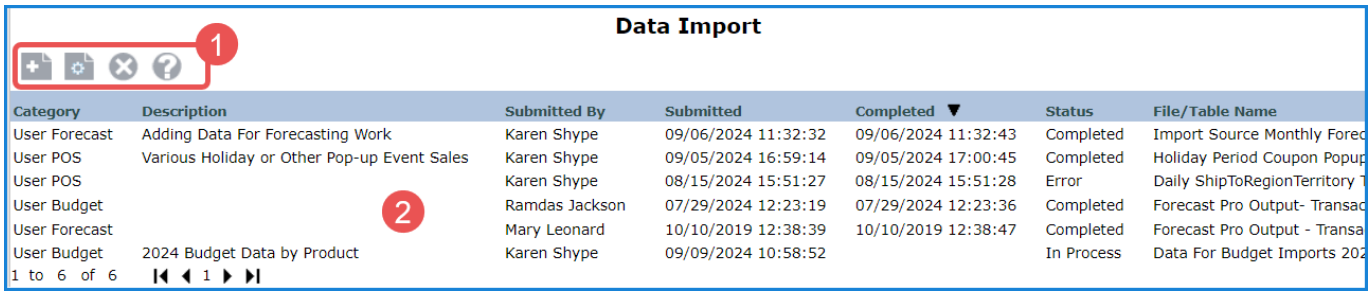
1	**Color Coding –** The color of text in this tab offers a clue to which dimensions will be impacted by an import. Blue text indicates the dimension will get populated based on the import data. Black and grey text indicates the dimension is not impacted by the import data and will be populated with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

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

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

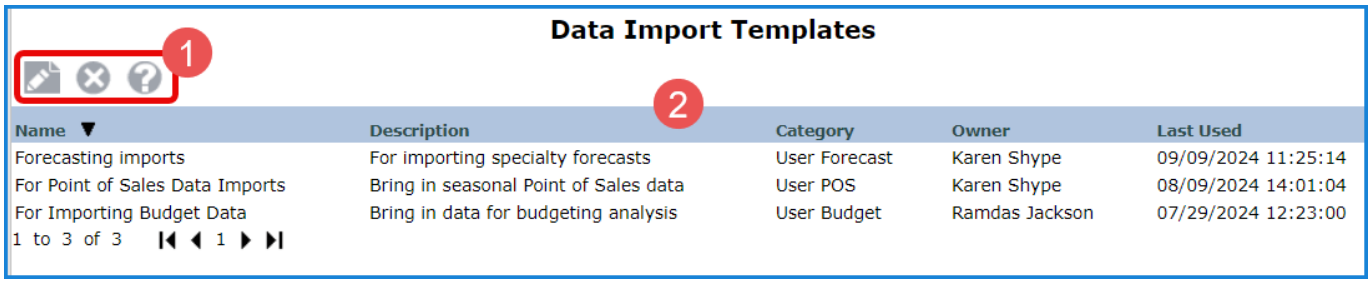
Dimension	Source
Customer Priority	Sourced from Customer Sold-To Previous Level definition
Customer Ship-To	None
Customer Ship-To Country	None
Customer Ship-To Postal Code	None
Customer Ship-To Sales Rep	None
Ship-To State	None
Customer SIC Code	Sourced from Customer Sold-To Previous Level definition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

Data Import List Window



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

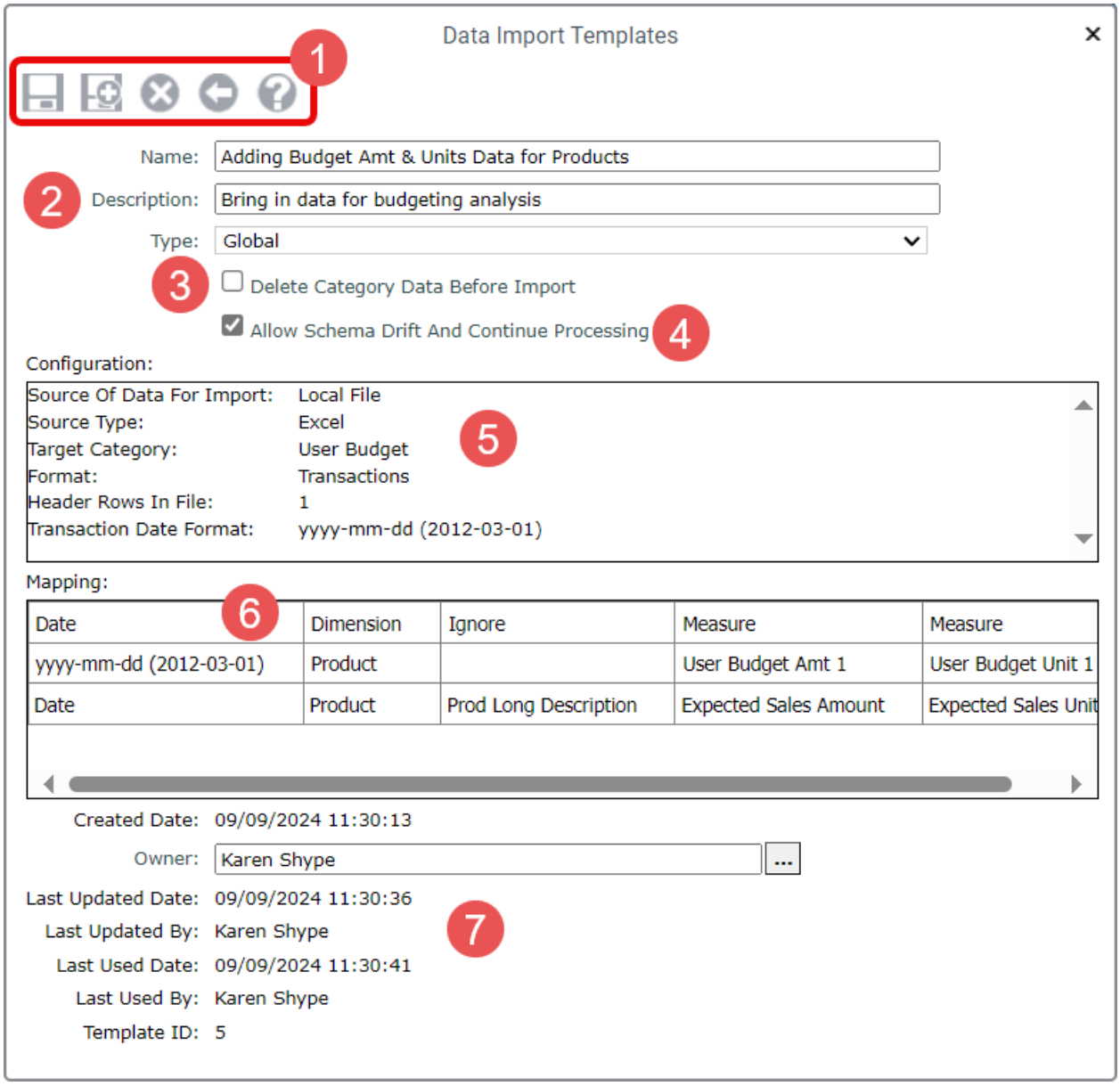
Data Import Template List Window



1	**Toolbar** – • **New** - Click to set up a new template. • **Delete** - Select a template and then click the Delete button to delete it. Any imported data for which the template was used is not impacted by the delete. • **Help** - Click to open help that is specific to working with templates.

2	**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	**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**  – 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**  – 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 Import Configuration window 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 Data Mapping window 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	The descriptive text at the top of the window gives you information about why the template(s) are a match for an import you've started to set up. • A match happens if the import source selected for the current import was used in the past with the same template(s) shown in the window • A match also happens when the Category of data in the import source is a match for what the template's been configured to be import.
2 and 3	Templates that can be used for your import are listed in the window. You can choose a template to handle configuration and mapping for you or choose not to use a template. You can proceed in one of the following ways. a. Choose a template and click Preview to review the applied template. The Data Mapping displays with the selected template's details applied to the import data. From there, you can give the import a description and process the import.

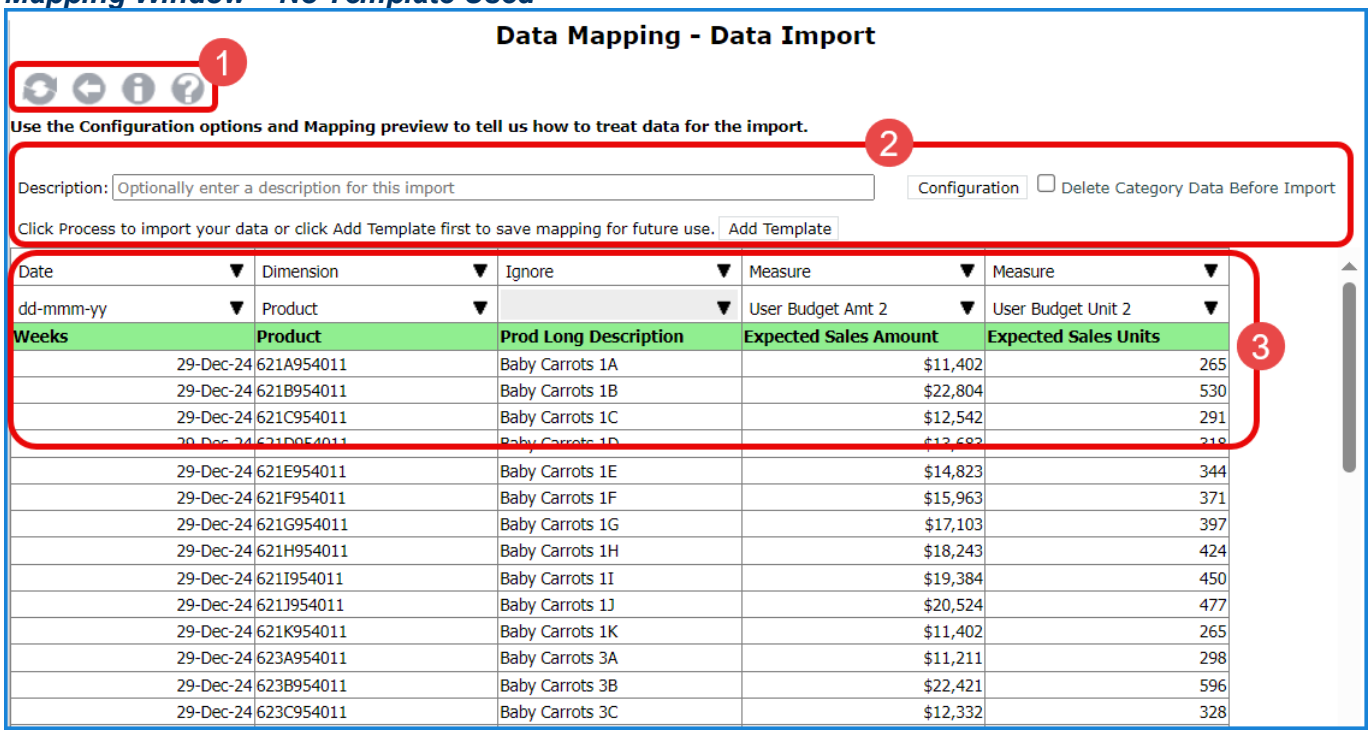
	b. Choose a template and click Process to proceed with processing the import and skip previewing it. You will be prompted to confirm you want to proceed with the import. c. Choose None then click Preview to proceed without using a template. Complete mapping and configuration setup using the Data Mapping 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.

- Mapping Window – No Template Used
- Mapping Window – Template Used

Mapping Window – No Template Used



Date	Dimension	Ignore	Measure	Measure
dd-mmm-yy	Product		User Budget Amt 2	User Budget Unit 2
Weeks	**Product**	**Prod Long Description**	**Expected Sales Amount**	**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	621I954011	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
29-Dec-24	623A954011	Baby Carrots 3A	$11,211	298
29-Dec-24	623B954011	Baby Carrots 3B	$22,421	596
29-Dec-24	623C954011	Baby Carrots 3C	$12,332	328

1	**Toolbar** - • **Submit The Data Import For Processing** - 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 Data Import list window. • **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** - 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 Data Import Information Window topic to learn about details displayed in this window. • **Help** - Click to open help that is specific to working with Data Imports.

2

Description – Optionally provide a description for the import, which helps you distinguish it from other imports.

Configuration – Click to access the Import Configuration window. From there, you can edit basic properties that tell Viewer about your import source and the Target category for the import.

Delete Category Data Before Import – Decide whether or not to clear all category import before the new data is imported. Select this option if you want to have all existing data from ALL measures of the Target category to be cleared before the new data is imported. If left deselected, imported data is added to existing measure data.

Add Template – Optionally save your configuration and mapping details as a template that can be reused again when processing imports for the same category. See also Add A Data Import Template. The active import at the time you are setting up a template will use the template for processing.

3

Data Mapping Preview – This section shows up to a 100 row preview of your import file / table. The drop-down lists in the first two rows are for use in mapping import data to Stratum – use them to tell Stratum.Viewer what's in each column, what to do with the data during the import, and what columns if any to ignore. Row(s) highlighted in green are the start of you import file and are what you told Viewer are the header rows in the import source (through a property in Import Configuration).

Note: Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the header rows contain dimension names, descriptions, and measure names.

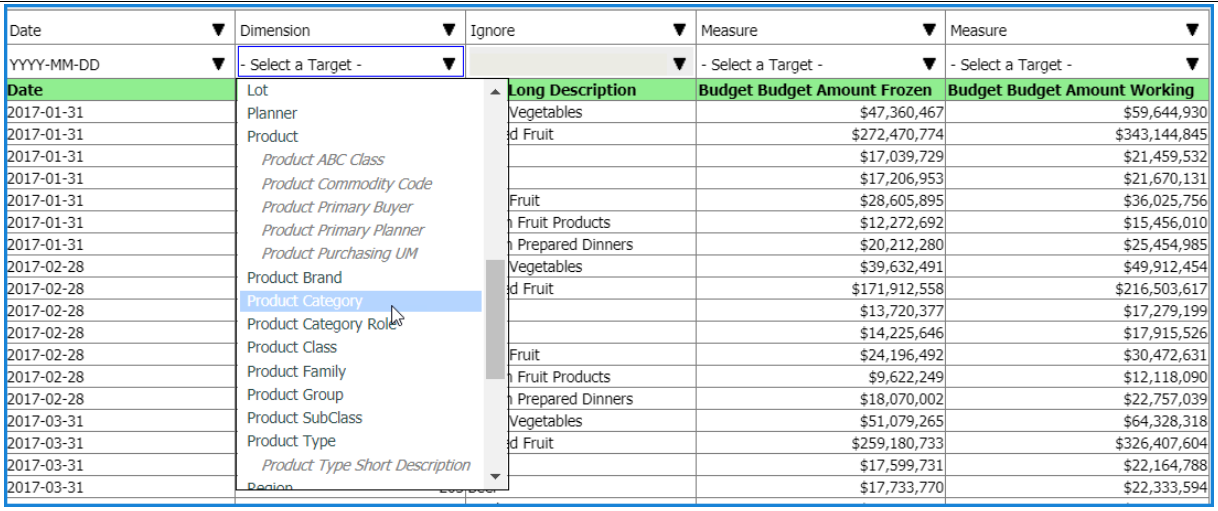
This example shows a progression of identifying what's in your import source using drop-down lists in the mapping window. Note that as you continue to do imports in Viewer after your initial one, some mapping may be done for you automatically based on what Viewer has learned about your prior import habits.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

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

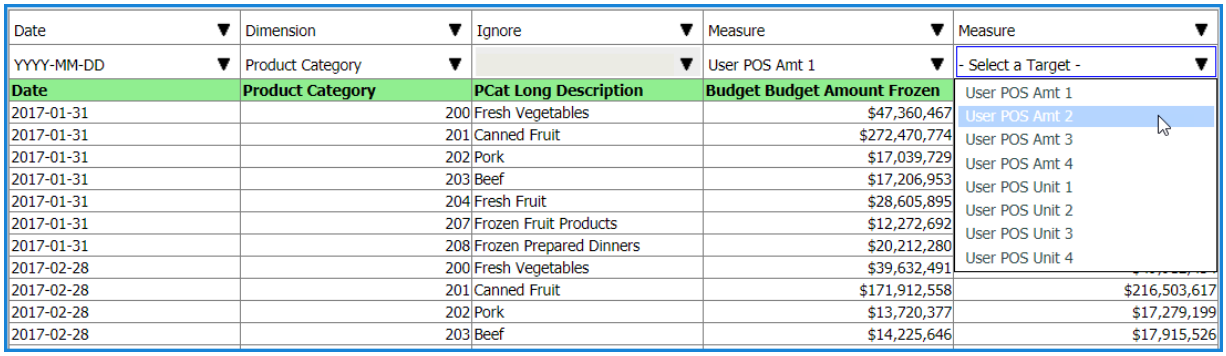
Ignore	Ignore	Ignore	Ignore	Ignore
Date	**Product Category**	**PCat Long Description**	**Budget Budget Amount Frozen**	**Budget Budget Amount Working**
2017-01-31	200	Fresh Vegetables	$47,360,467	$59,644,930
2017-01-31	201	Canned Fruit	$272,470,774	$343,144,845
2017-01-31	202	Pork	$17,039,729	$21,459,532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

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

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

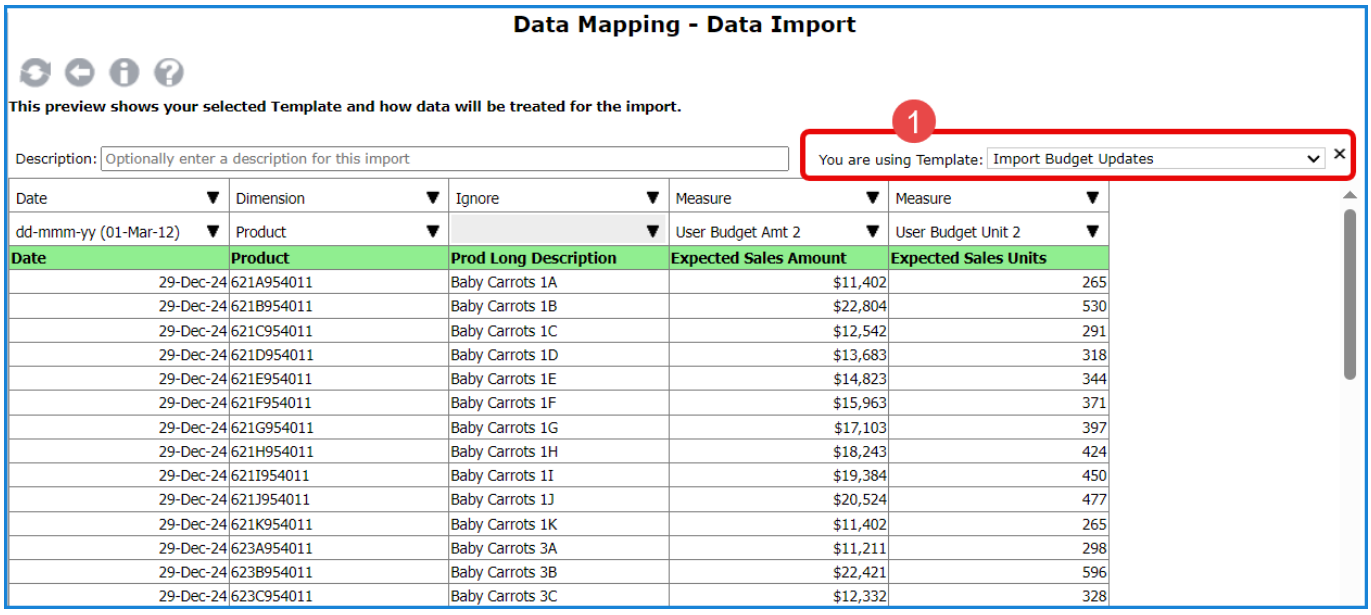


The Target drop-down list under each Measures are used to choose the target Stratum measures to receive the imported data. The mapping is complete, and the user can process the import.



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.



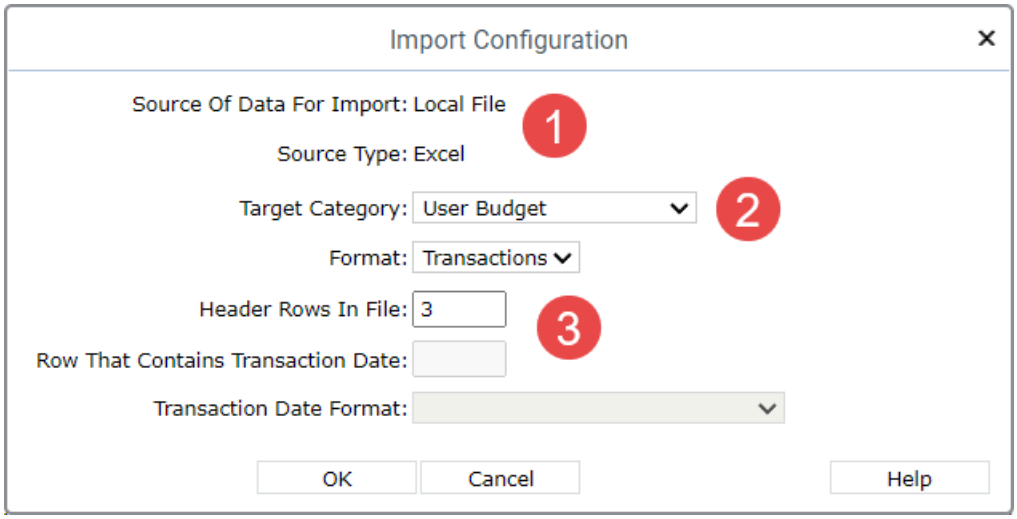
Import Configuration Window

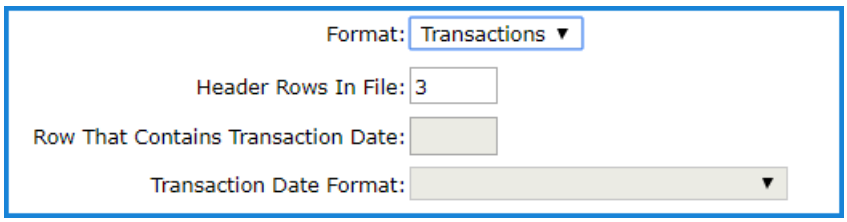
This window is used to configure some details for data imports. The properties vary depending on the type of data source used for your import. Browse the topic below to learn about the different versions.

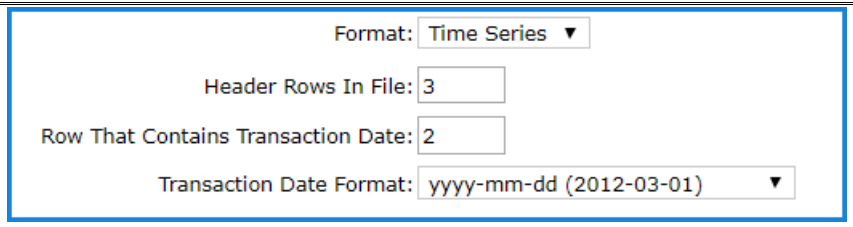
Note: Once you have done a few imports, Data Import learns about your import data habits and can do some automatic configuration and Data Mapping. When that happens, the Import Configuration window is bypassed. You can open it anytime by clicking the Configuration button in the Data Mapping window.

Excel Spreadsheet

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



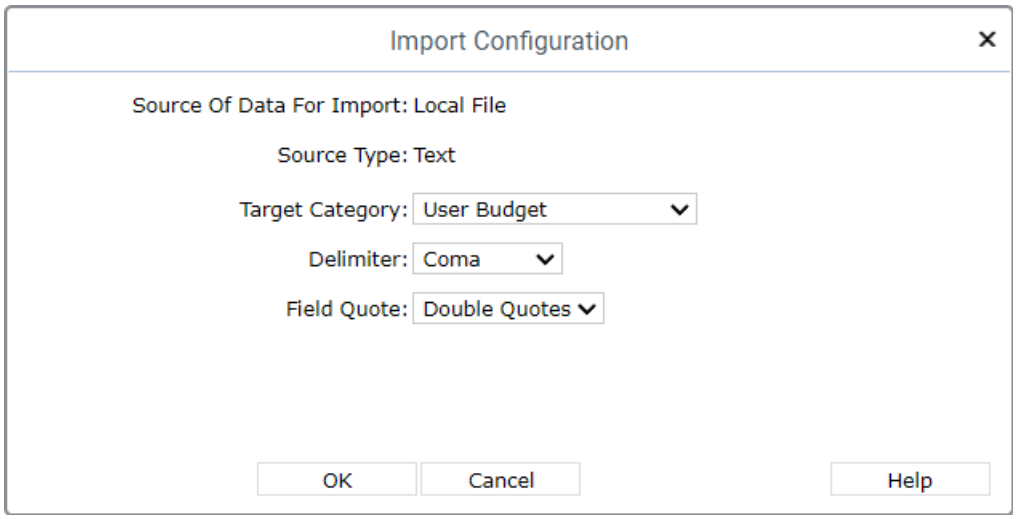
1	**Source Details –** Information at the top of the window tells you about the type of source used for the import, which in this example is a Local File and Excel spreadsheet.
2	**Target Category** - The Target category is the one that will receive imported data. Measures from that category will be 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 i**s either Transactions or Time Series. Transaction means the dates for an import are in a column in a file. Time Series means dates are in a header row across the top of the file. The remaining selections to make depend on the selected import format. • **Transactions** – with this import type, you need to identify how many **header rows** are in the import file. Header rows contain descriptive details that aid you in mapping but do not get imported. For example, the rows contain dimension, descriptions, or measure names.  • **Time Series** – with this import type, you need to identify how many **header rows** are in the import file, which of those rows contains the **transaction date** for each measure column, and the **format the date** is in such as yyyy-mm-dd.



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

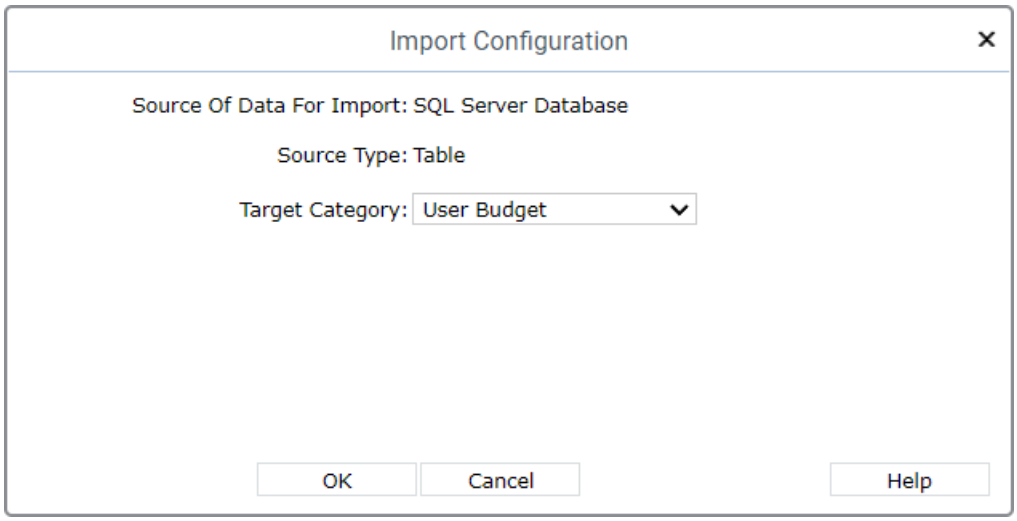
CSV or Text File

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.



SQL Server Database

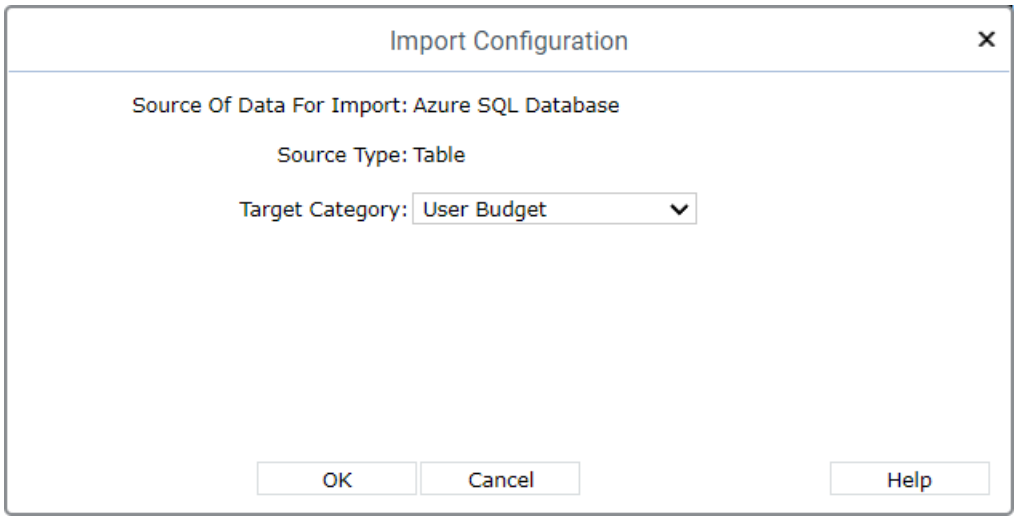
The window includes a property to set the Target Category for the import.



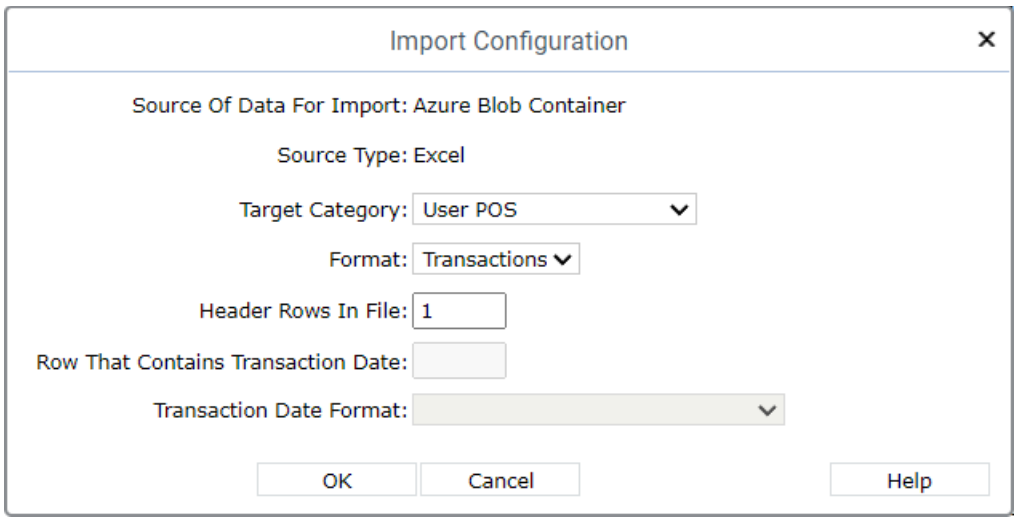
Azure Cloud Source

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.



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 local Excel file.

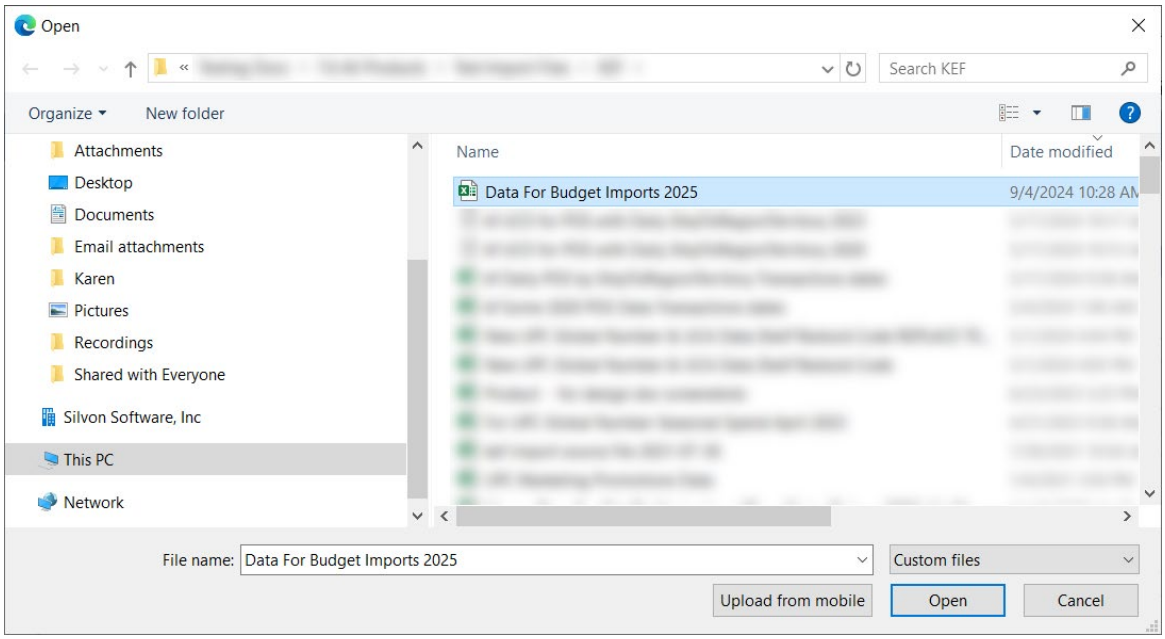


Open Window

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

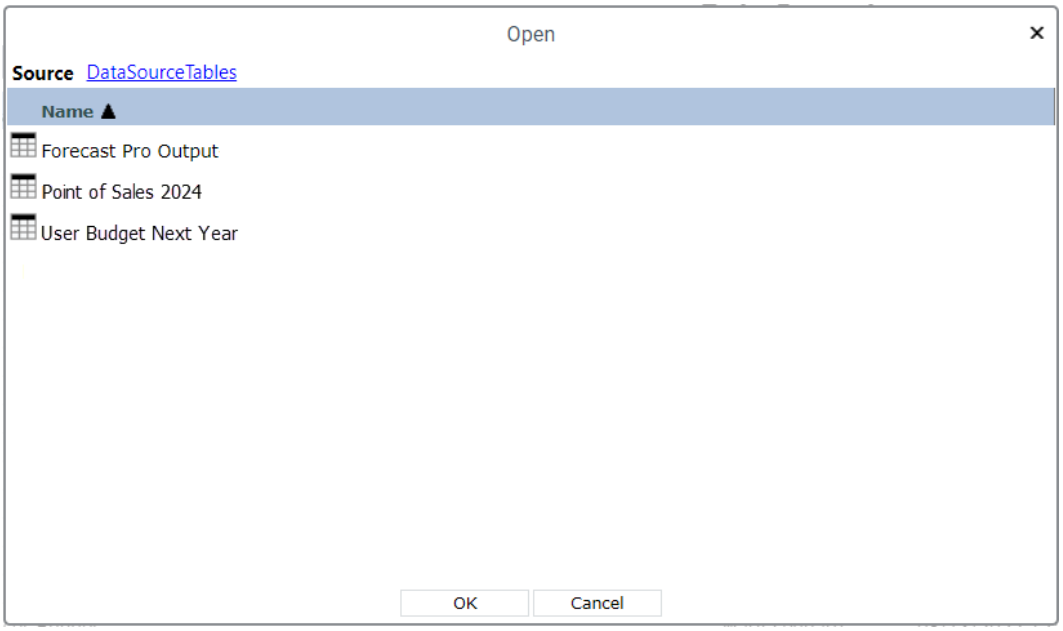
This window is for choosing a local Excel, CSV, or Text file for an import. Click the Open button once you've selected the file for your import.



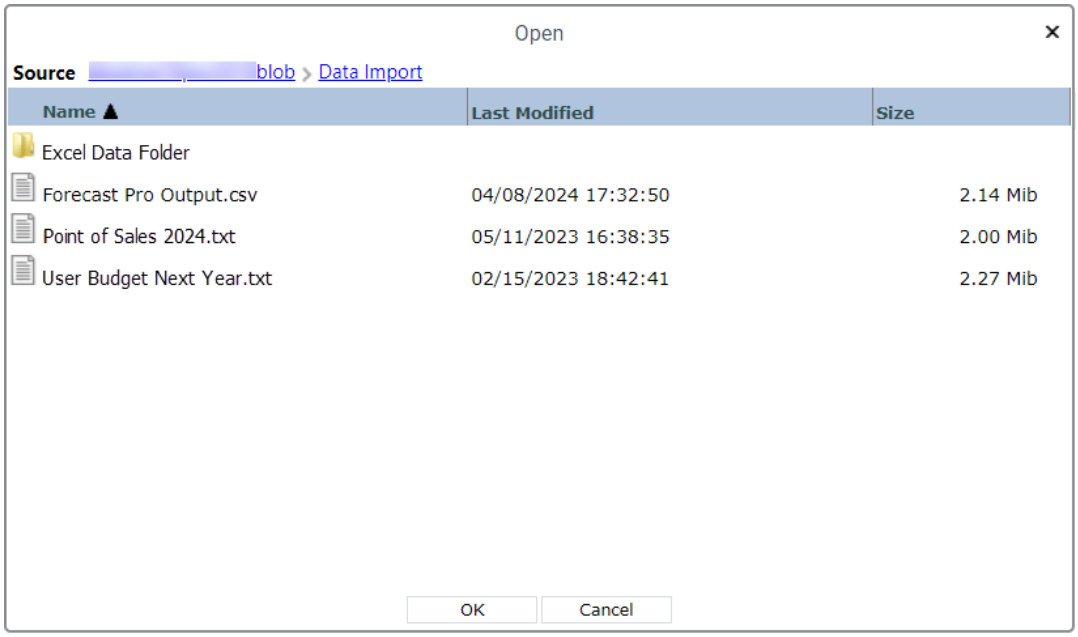
SQL Server Database or Azure Cloud Sources Open Window

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.

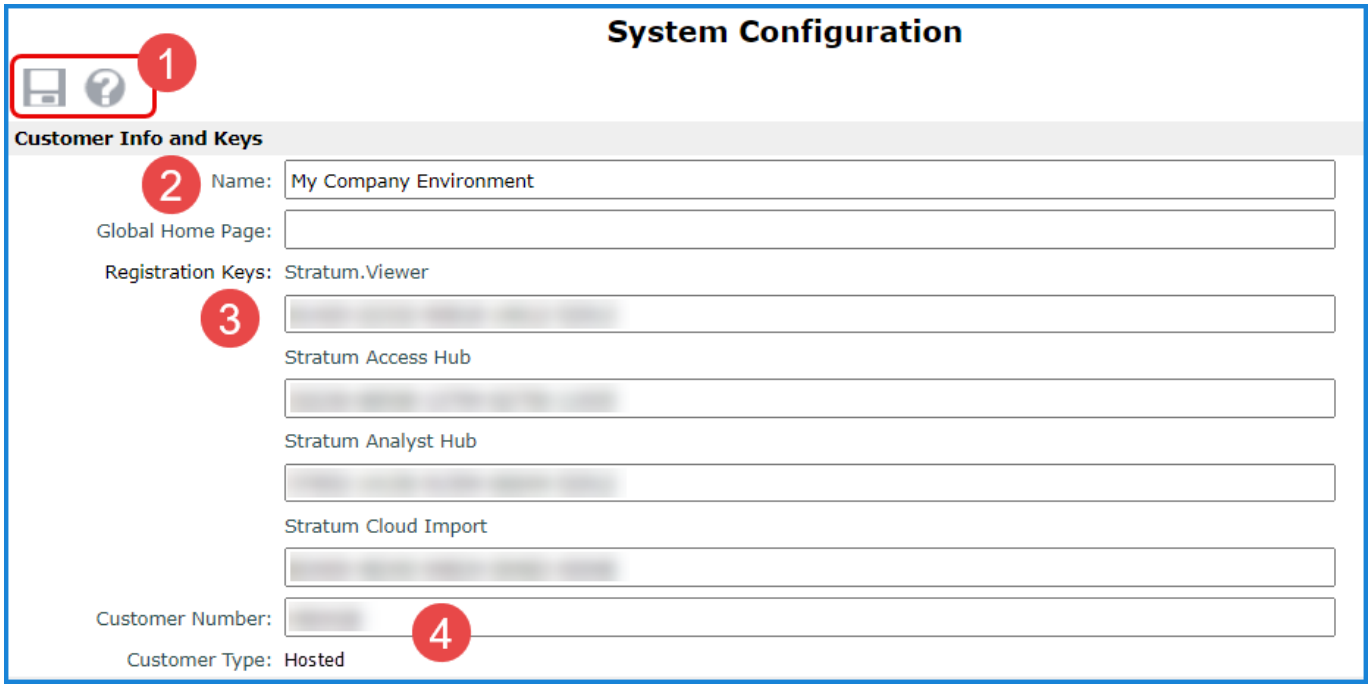


Here's a window for choosing a file from an Azure Blob Container. The windows for any Azure cloud source include breadcrumb links at the top. Click them if needed as a shortcut for going back to prior levels of folders you navigated through to get to the current location being viewed within the source.



System Configuration Window

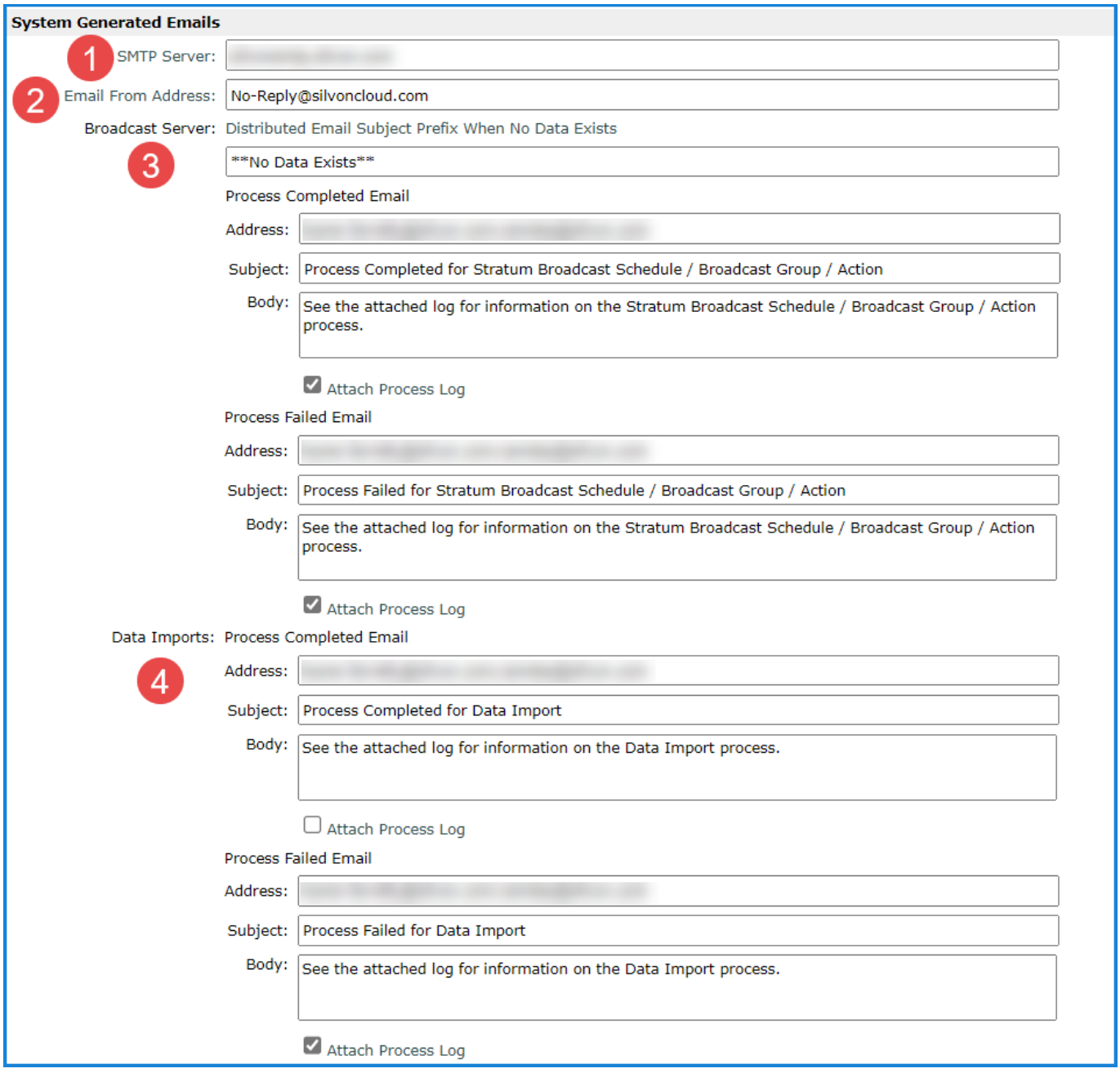
Customer Info & Keys Section



1	**Toolbar** - • **Save** - Click to save changes to system configuration. • **Help** - Click to open help that is specific to working with system configuration.
2	**Name -** Use this field to customize the name that displays for the application in the browser title bar and tab. **Global Home Page** - Use this field to define a custom, global home page for Stratum.Viewer. The home page can open to a web site, document, directory, or other supplementary information that would be meaningful for users. If you leave this field blank, the application home page defaults to a Stratum home page that has links to Stratum.Viewer videos and other resources. If needed, administrators can define different home pages for particular users or user groups through settings in the User Profile or User Profile Group windows.
3	**Registration Keys** - A valid registration key is required for licensed copies of Stratum and specialized functionality within it. If you receive a message about a missing or invalid key, contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com. License keys are required for: • Stratum.Viewer • Stratum Access Hub, which includes the Stratum Broadcast Manager plus Excel exporting and Stratum Power BI Connector functionality. • Stratum Analyst Hub, which includes Planning, Data Import, and Master Data Import features.

	• Stratum Cloud Import, which extends Data Import functionality to allow for Data Steward functionality and to import local SQL Server databases or Azure cloud sources.
4	**Customer Number** - This is a unique identification number for your Stratum.Viewer implementation. Contact Silvon Support at (800) 474-5866 or CustomerSupport@silvon.com mailto: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

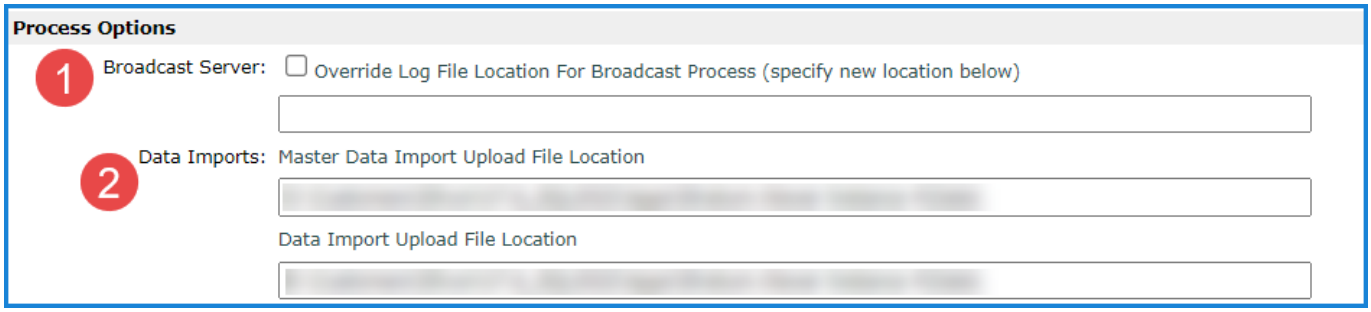


1	**SMTP Server** - This setting controls how Stratum.Viewer delivers the emails that it generates. The property defaults to a "localhost" value, in which case Stratum.Viewer emails will be delivered using the SMTP configurations for the server where Stratum.Viewer resides.

	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 No-Reply@silvoncloud.com 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.

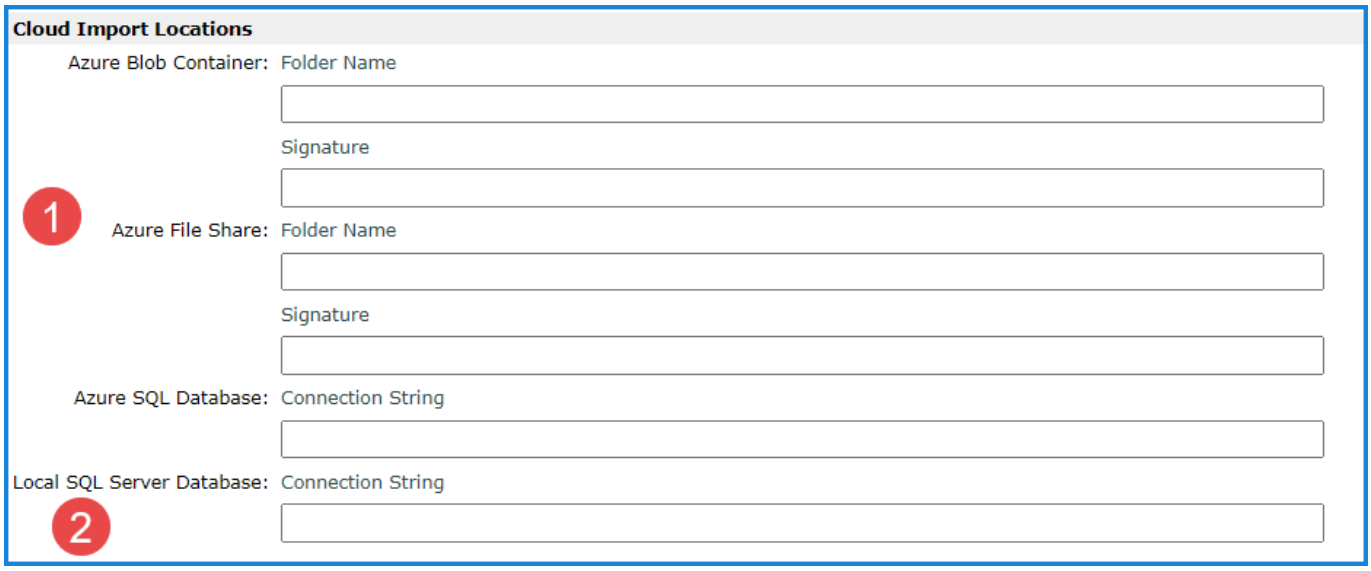
4	**Data Import email properties** are described below. These are sent when data imports are processed from Stratum.Viewer as long as you also have specified an Email From Address in the System Configuration window. Typical recipients you might specify are administrators, Data Stewards or other interested 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



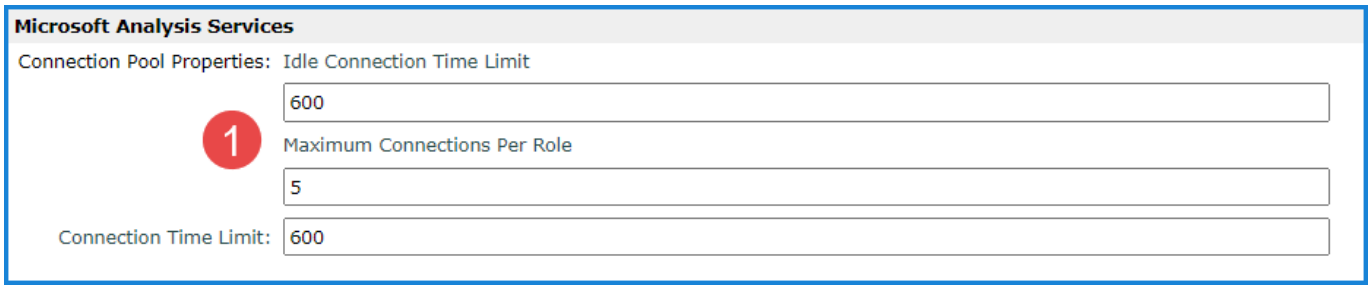
1	**Override Log File Location For Broadcast Process** – This **Broadcast Server** property can be used to customize where log files from Broadcast Server processing are stored. The logs are from the processing of broadcast schedules, broadcast groups, and actions. By default, logs are stored in the '\Logs\Broadcast Server' sub-folder in the directory where your Stratum.Viewer implementation is installed. If you want to change the log file location, select the Override Log File Location checkbox and enter the location in the related field. The location you specify must exist already and be one to which your company's Action Processing Account has access rights.
2	**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\share-name\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



1	Data Imports using data from Azure cloud sources is only allowed if your environment is licensed for Stratum Cloud Import. Use the applicable fields provided in this section of System Configuration for supplying connection details about Azure sources for your 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. ***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 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. **Local SQL Server Database** – Enter the Connection String.

Microsoft Analysis Services Section



1	**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.

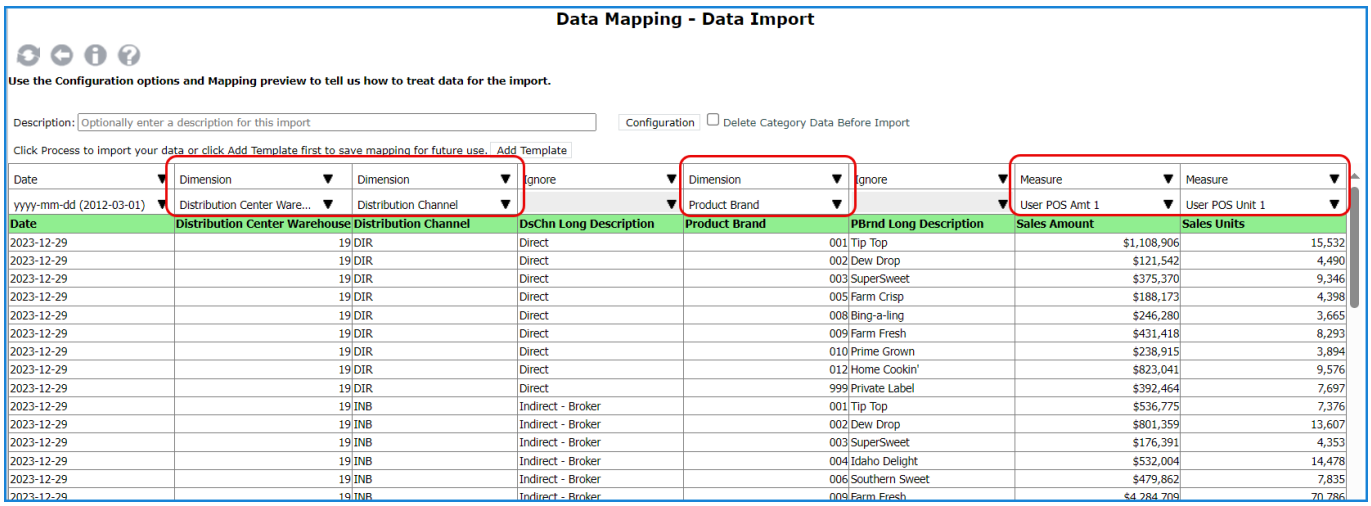
Advanced Concepts

Automatic Data Mapping And Import Configuration

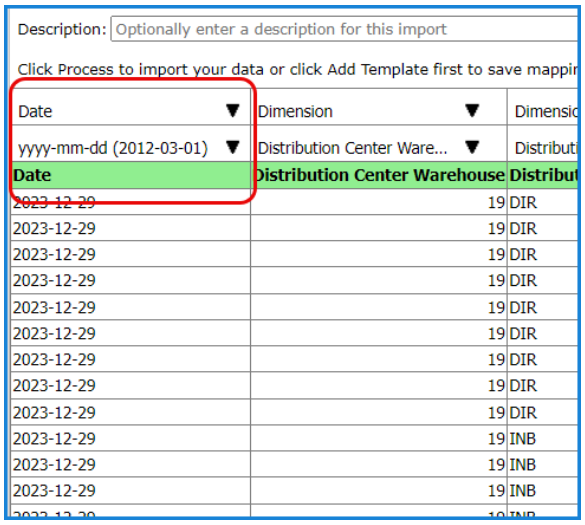
Data Import will automatically make mapping selections for you as it picks up mapping and data patterns from prior imports. Automatic mapping can save you some steps in the import process. It takes into account what categories, measures, dimensions, and column captions were used in prior imports. If 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 Data Import Templates.

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



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



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.

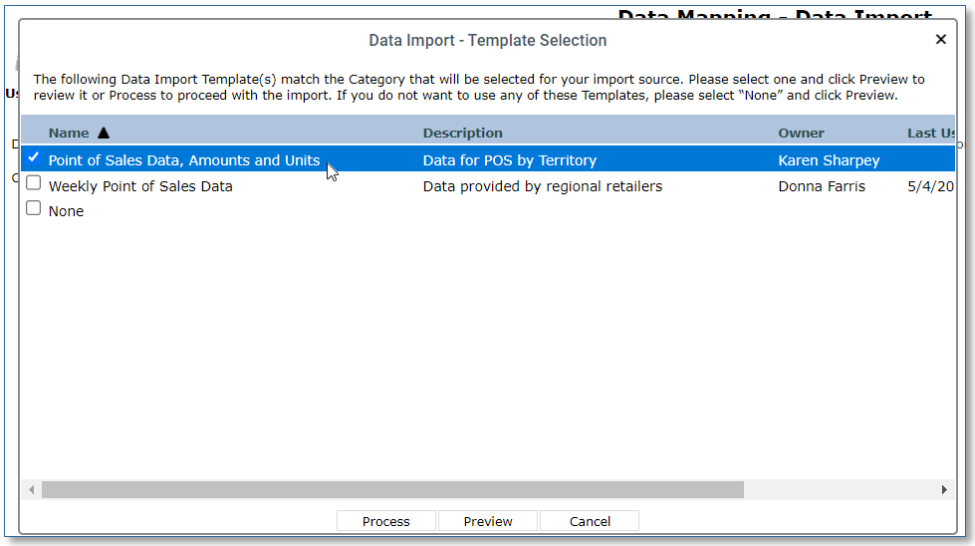
Data Import Templates

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.

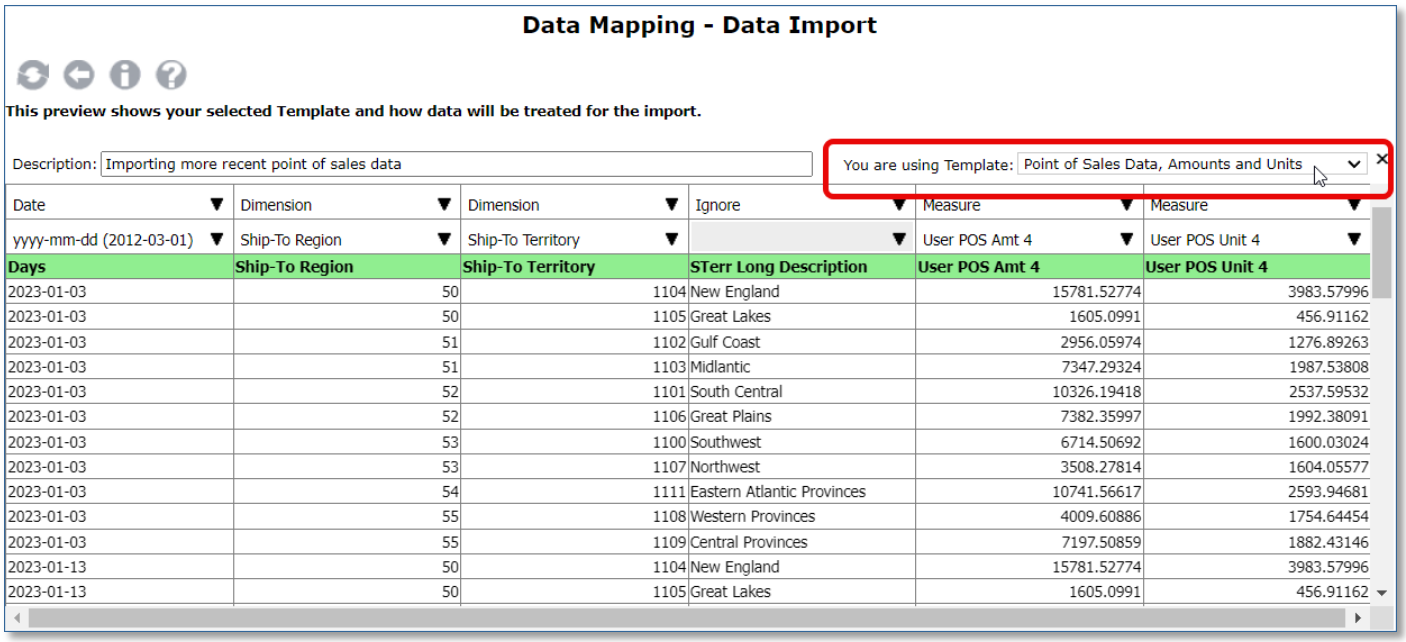
Templates can handle schema shifts as part of their automatic data mapping features, making for smooth handling of structural changes to your transactional data.

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.



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.

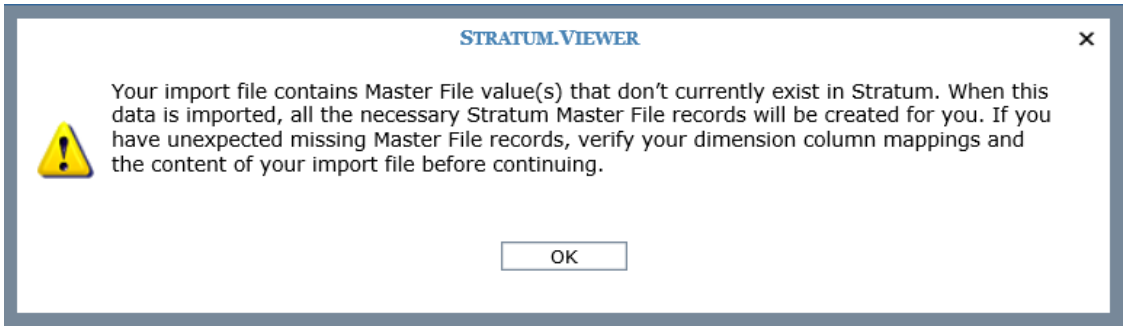


Imports Where Stratum Master Data Doesn't Exist

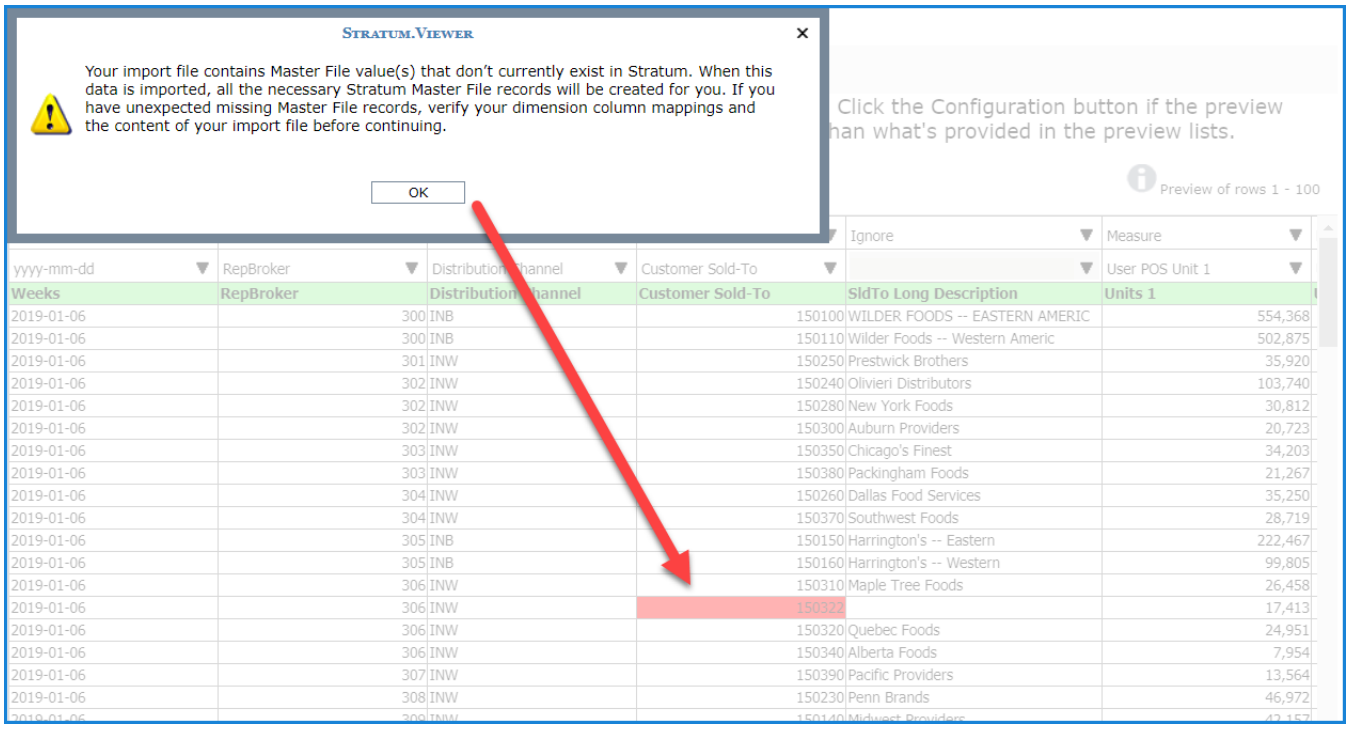
Import files and tables contain dimensions, measures, and date values which are used to determine where data gets mapped and imported to once your import is processed. Data Import performs some validation checks on the data in your import source to make sure everything is in place to proceed with the 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 Data Mapping preview of your import – though some of the value may be in rows beyond the 100 row preview. Some options if you see this message: proceed with the import, review and adjust your Data Mappings for the column then proceed with import, or cancel the import to adjust your import file 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.



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.

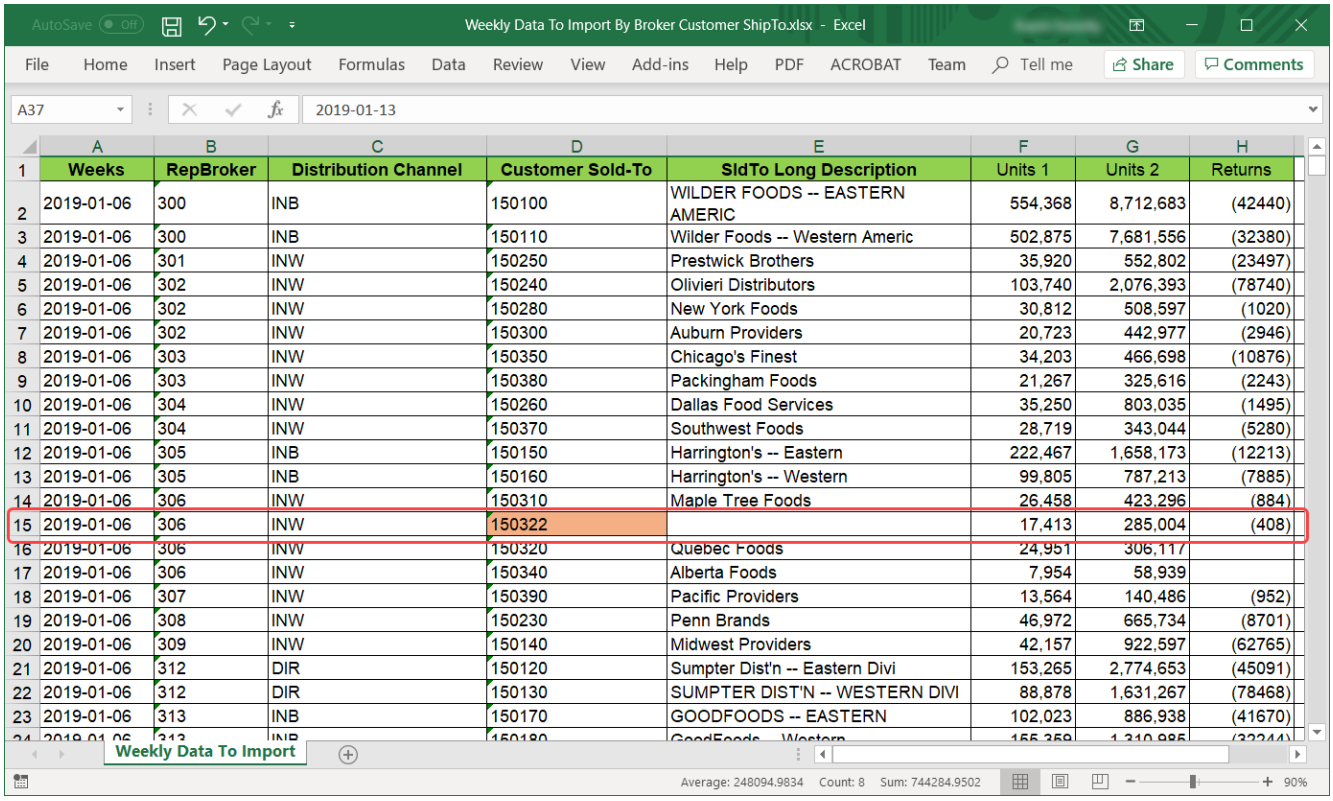


Here's a closeup of the value that caused the message to display. The user can proceed with the import, leaving that value in place – in which case, Data Import will create the needed Master data. Or, the user can cancel the import, correct or remove the row from the import file, and try the import again.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

Validate | Configuration | Preview of ro

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

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

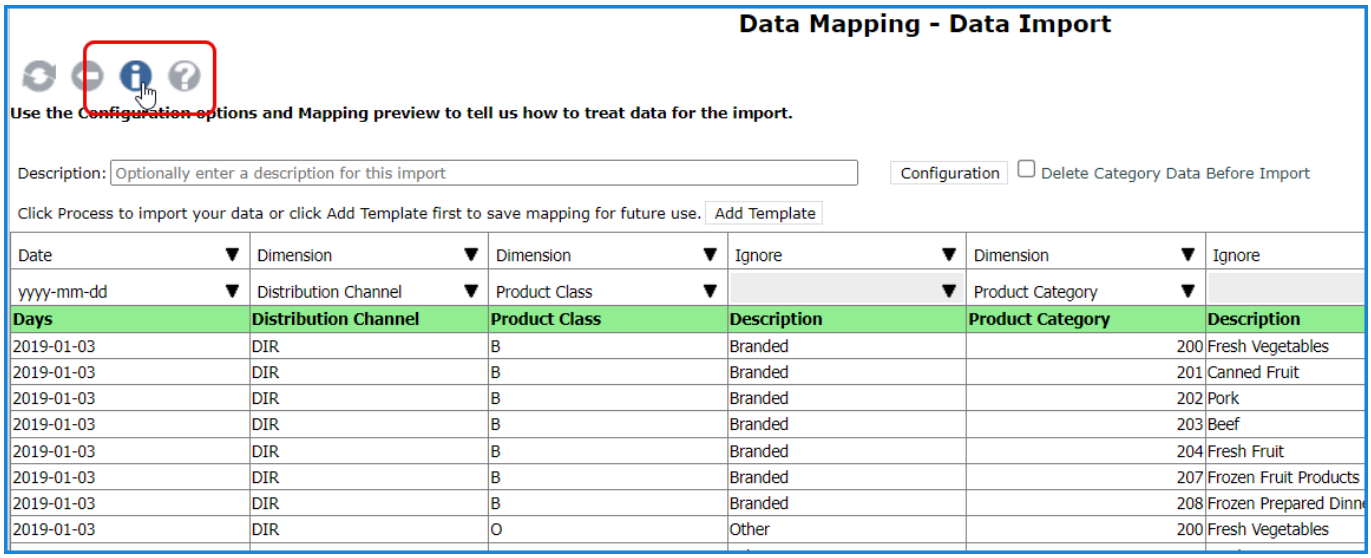


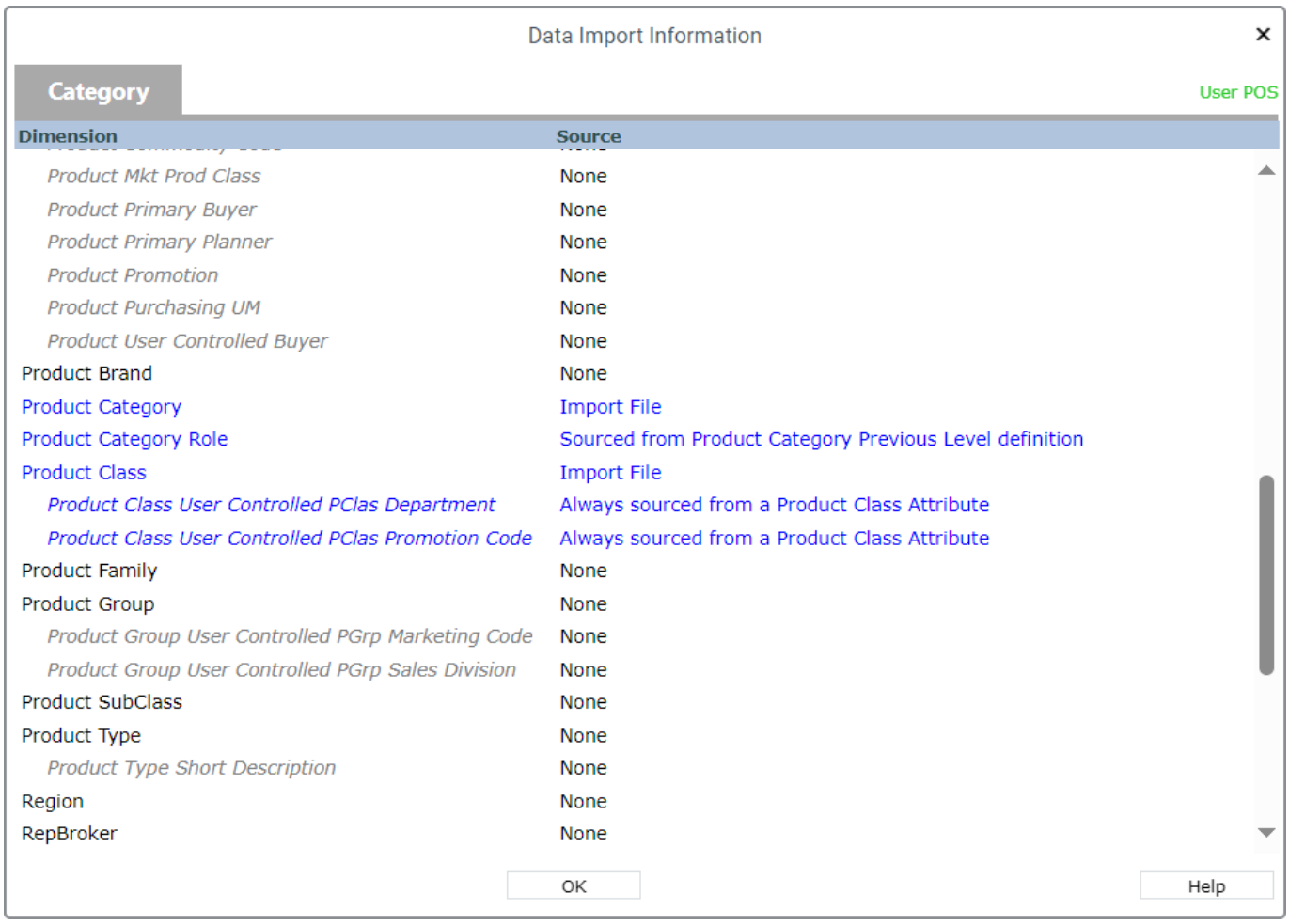
	A	B	C	D	E	F	G	H
1	**Weeks**	**RepBroker**	**Distribution Channel**	**Customer Sold-To**	**SldTo Long Description**	Units 1	Units 2	Returns
2	2019-01-06	300	INB	150100	WILDER FOODS -- EASTERN AMERIC	554,368	8,712,683	(42440)
3	2019-01-06	300	INB	150110	Wilder Foods -- Western Americ	502,875	7,681,556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

Review Dimension Details For A Target Category

The Data Mapping window for previewing and mapping imports to Stratum includes an Information button in the toolbar. Click it to see details about the import's Target category 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.





Review Processing Details For A Data Import

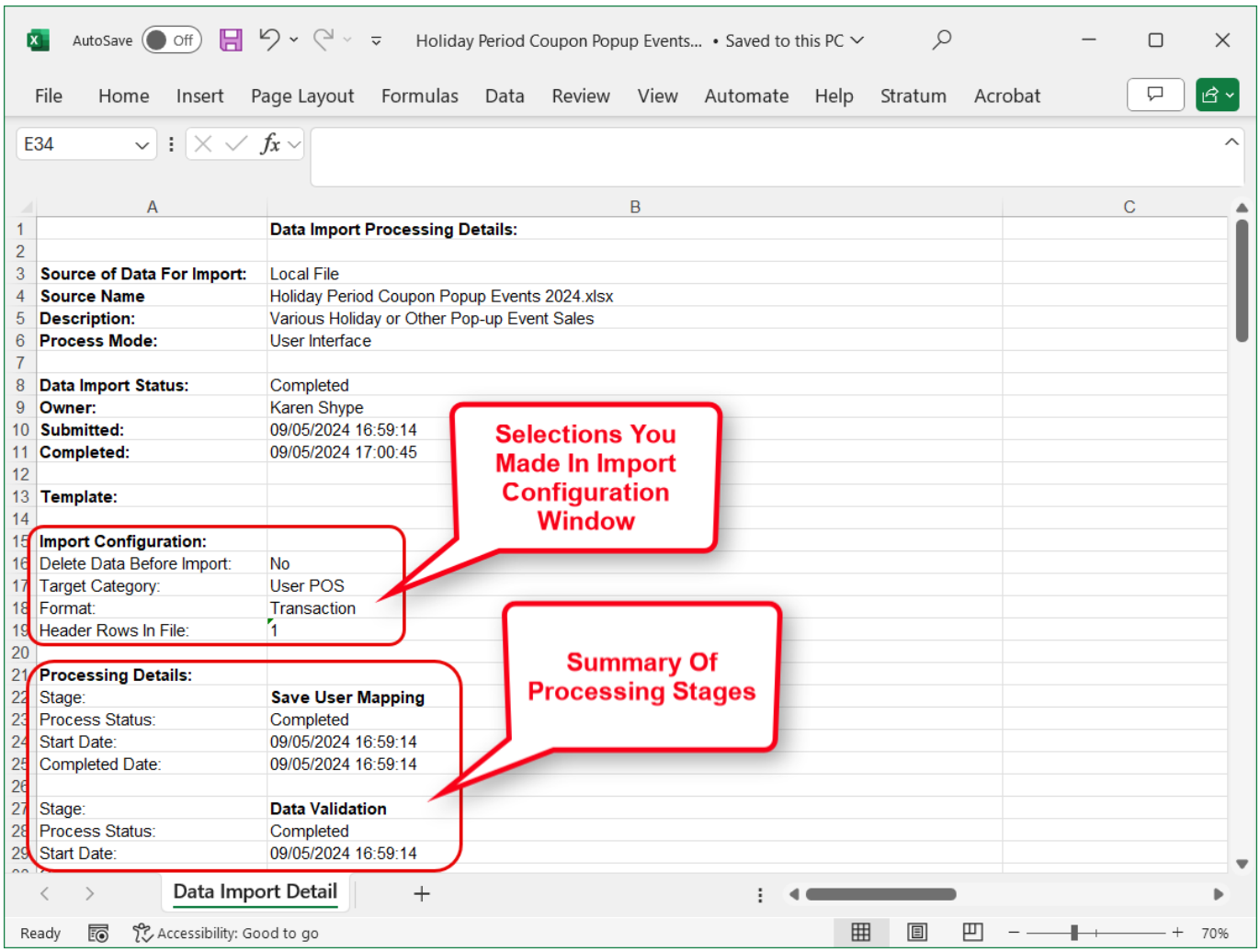
The Processing report provides detailed summaries of a Data Import. The report is an Excel file containing all details about a Data Import, such as the Target category for the import, how many rows of data were imported, and what dimensions and measures the import data was mapped to in Stratum. The report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

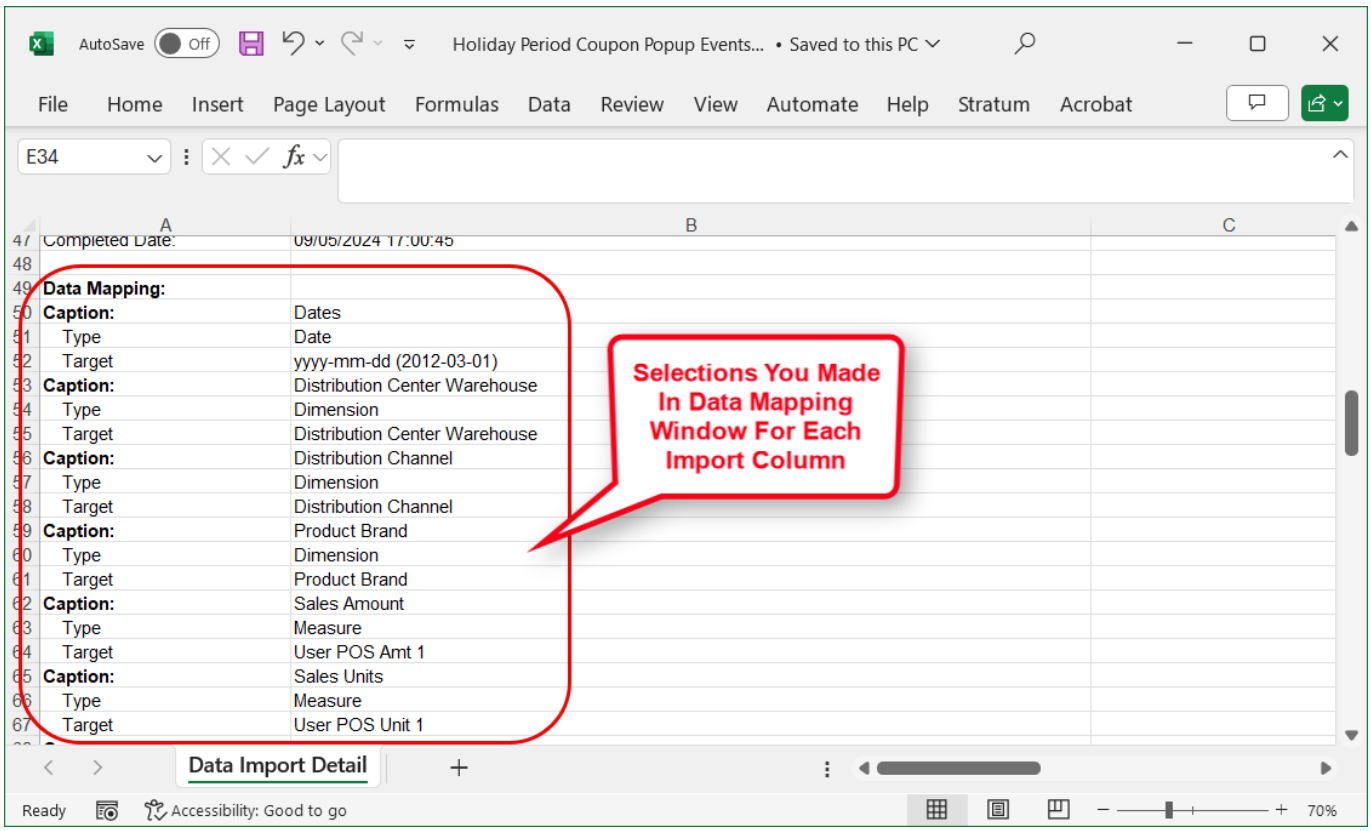
2. In the Data Import List window, select the Data Import for which you want to see a report.

3. Click See Processing Details For A Data Import  .

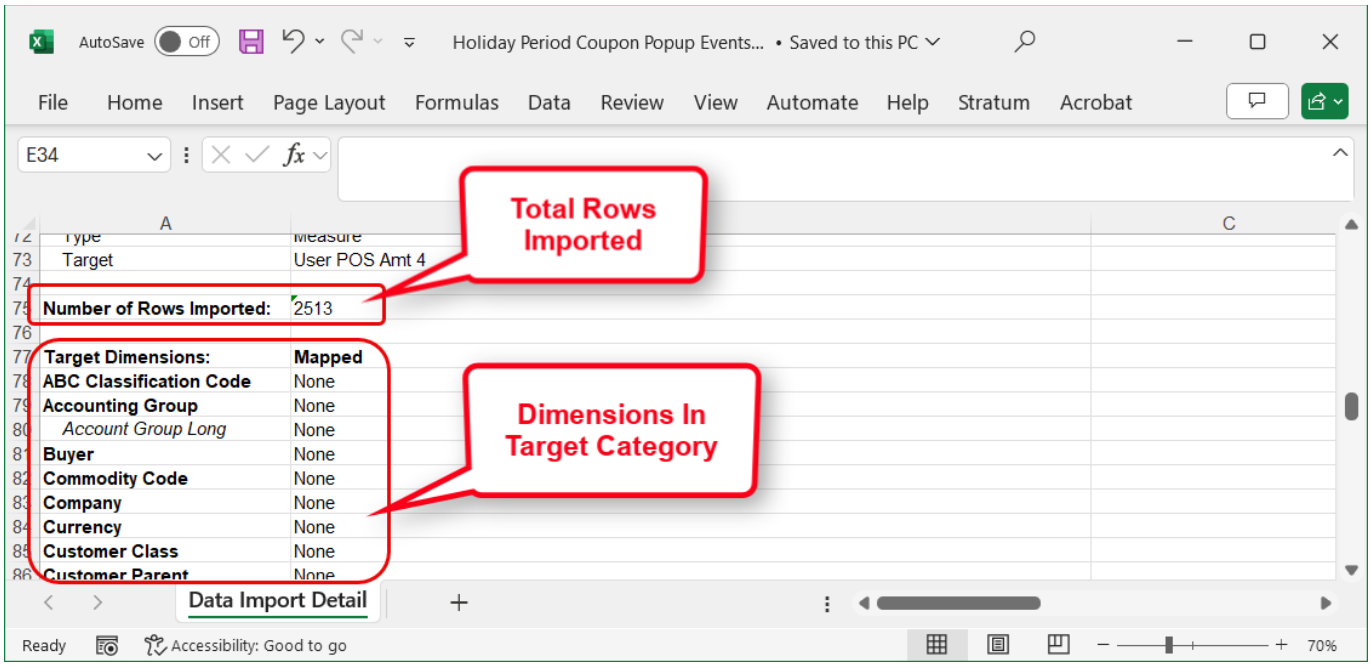
The start of the report shows general details like type of import source and name of the import file or table, who created and processed the import, and when it was processed. The Template section is populated with configuration information if you used a template. If you didn't use a template, the Import 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.



After the stage details, the report shows each column in your import file and how it was mapped to Stratum items in the Data Mapping window. 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.



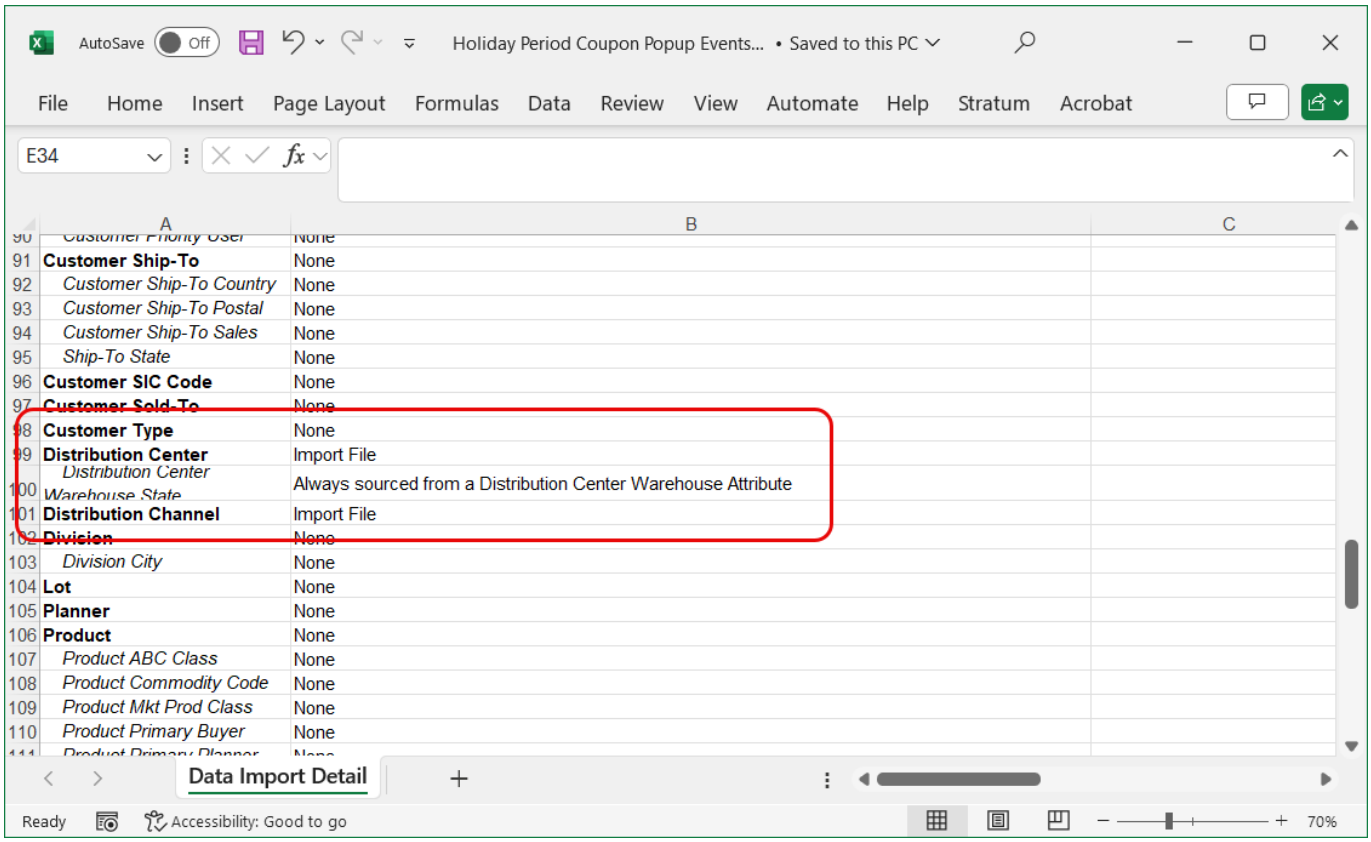
You can see how many total rows were imported by looking at the Number of Rows Imported section of the file. After that, there's a Target Dimensions section. That section is explained after the next image in this topic.



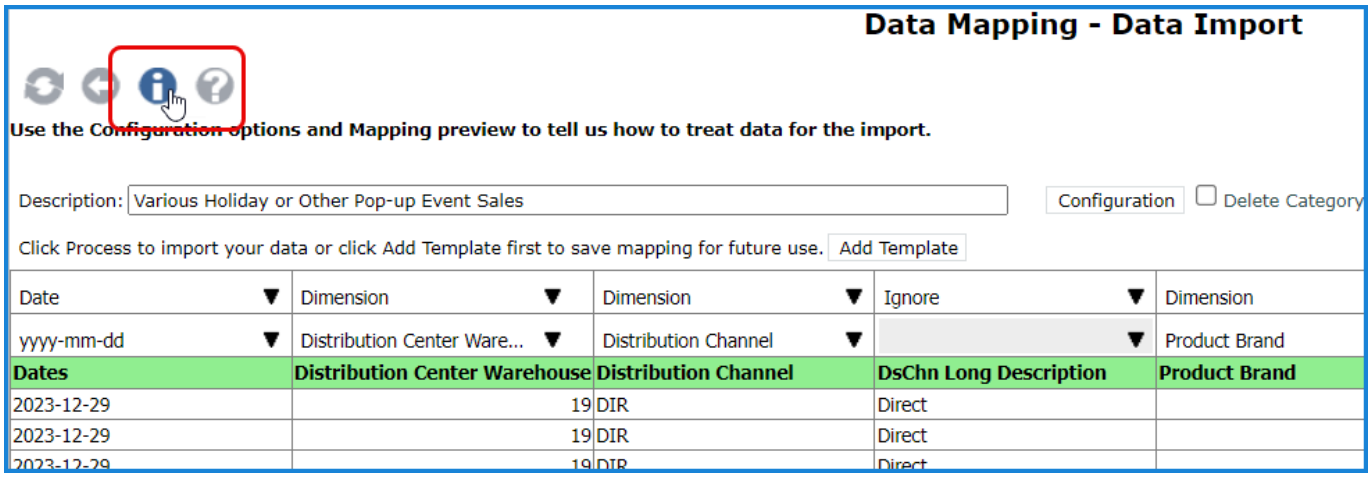
The Target Dimensions section and its Mapped details tell you which dimensions belong to the Target category, which dimension have been directly mapped to for the import, and what other additional dimensions will be impacted by the import. The Mapped column will indicate one of the following for a dimension:

- **Import File** – means the data for this dimension will come directly from the import 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).



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



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 No-Reply@silvoncloud.com as the Email From Address. See also Specify An Email From Address For System Generated Emails.

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.

3. In the Email From Address field, specify the email address to use. If your environment is a hosted environment, you should use No-Reply@silvoncloud.com 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 Examples section of this Data Import help. If you have questions about where data ends up, review the processing report for an import. It summarizes how measures and dimensions were mapped and shows the source of data for each dimension associated with the import's Target category.

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

Import File/ 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

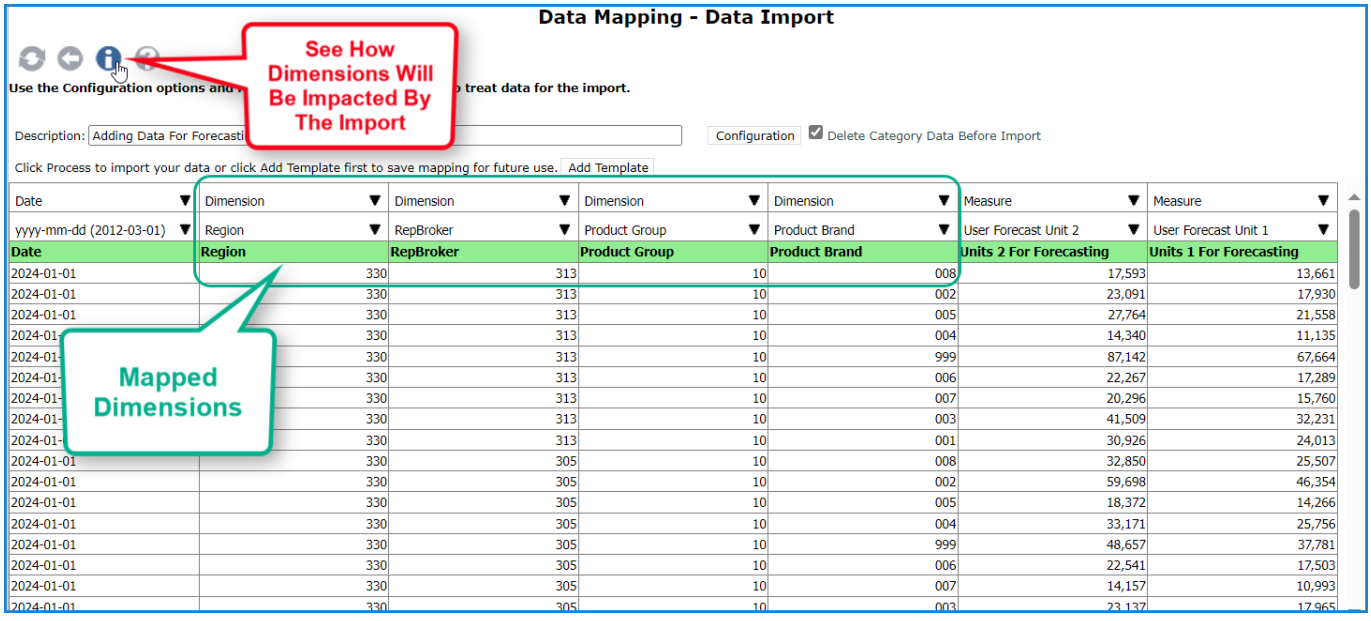
- Dimensions that have associations with other dimensions through Stratum previous level relationships
- Their data is derived from another dimension based on Stratum previous level details
- "Sourced from ... Previous Level Definition" shows as their data source in the import processing report

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 their default value. The source for these dimensions is "None" in the import processing report.

The import shown in the next image has four dimensions in its 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 Data Import Information window for this import. That window is accessed from the Data Mapping window and shows how the import will treat various dimensions.

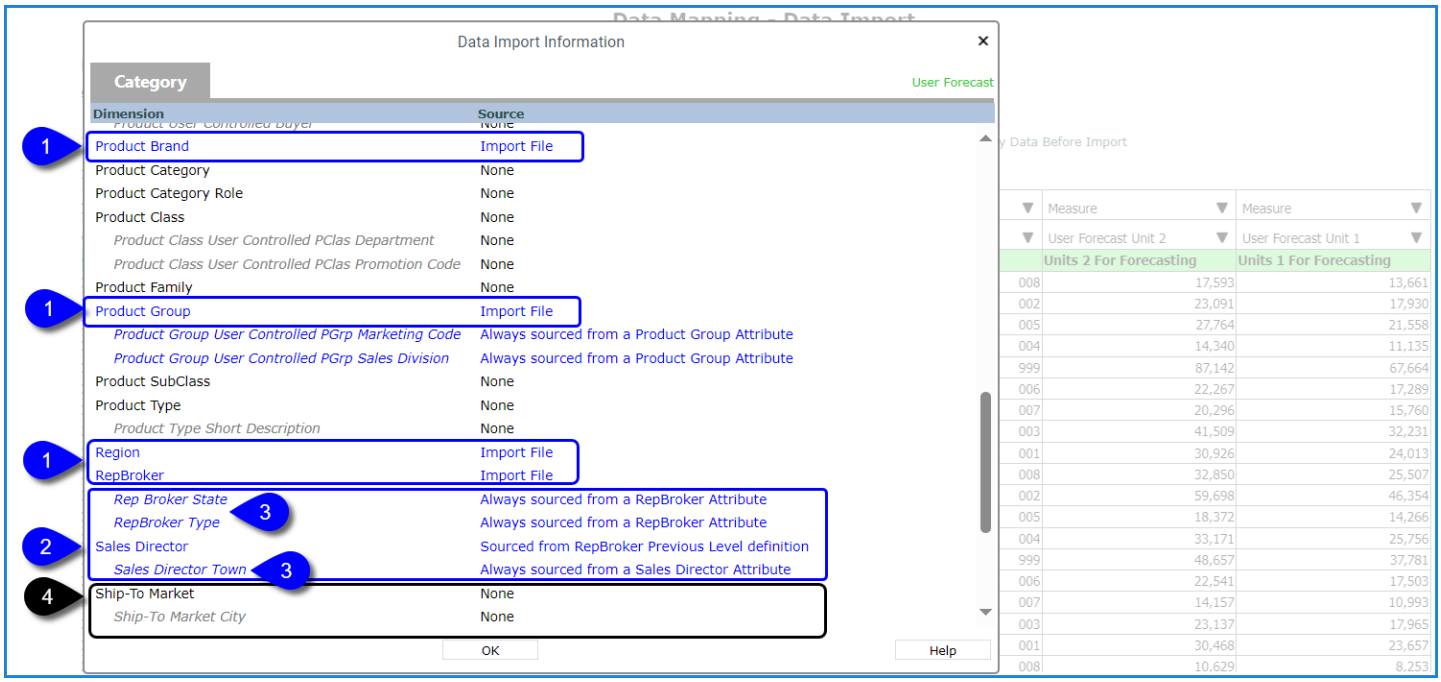


Date	Dimension	Dimension	Dimension	Dimension	Measure	Measure
yyyy-mm-dd (2012-03-01)	Region	RepBroker	Product Group	Product Brand	User Forecast Unit 2	User Forecast Unit 1
Date	**Region**	**RepBroker**	**Product Group**	**Product Brand**	**Units 2 For Forecasting**	**Units 1 For Forecasting**
2024-01-01	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-	330	313	10	006	22,267	17,289
2024-01-	330	313	10	007	20,296	15,760
2024-01-	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

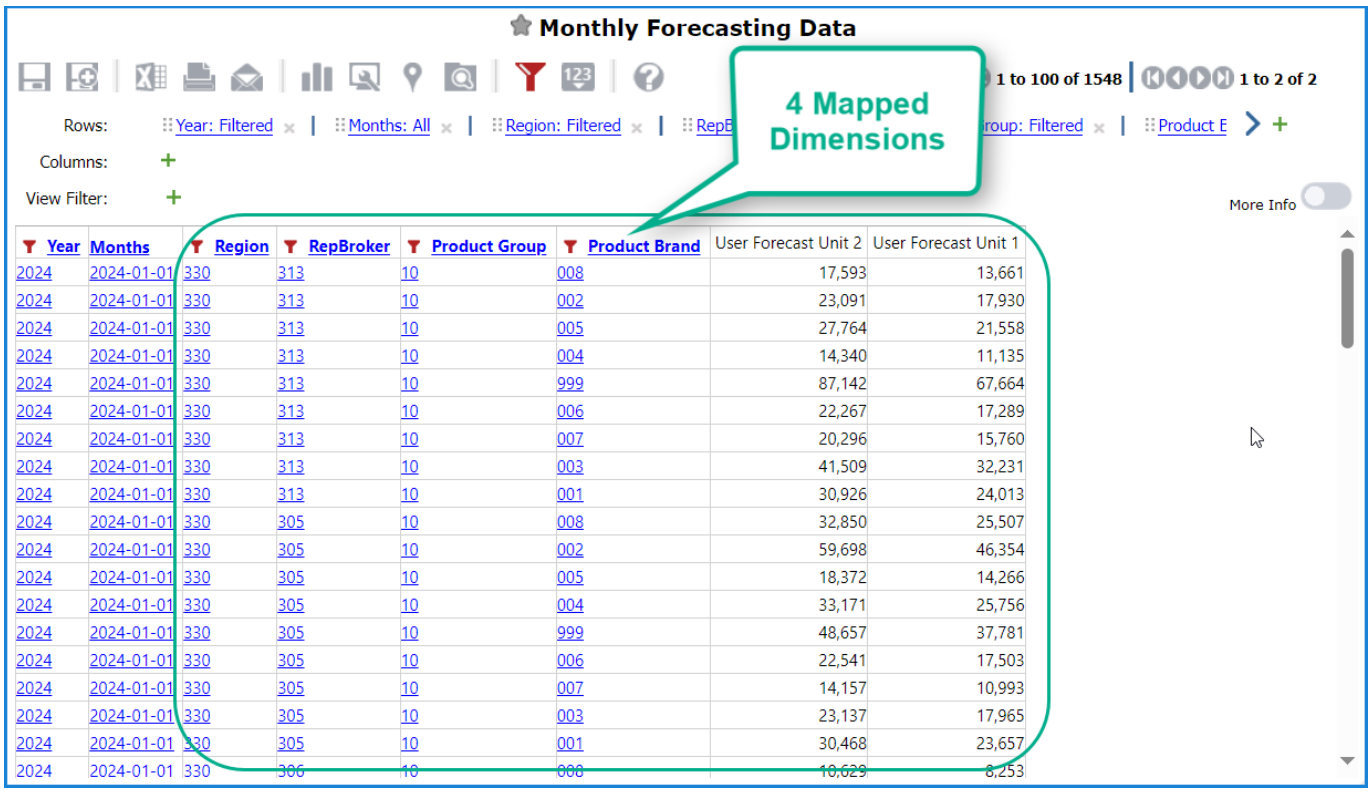
Here's some things you can see in the Category window:

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.

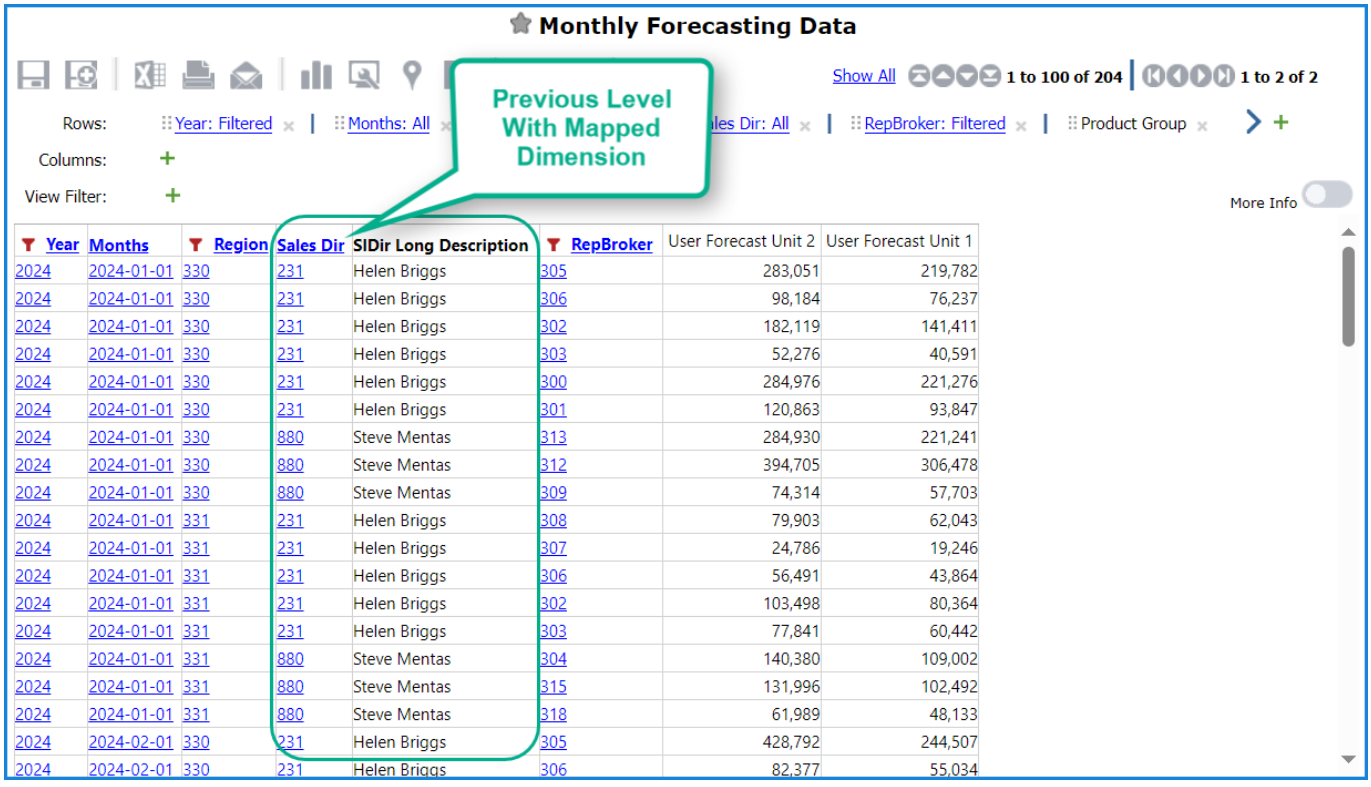


Here's the view when mapped dimensions are on display. The Region, RepBroker, Product Group and Product Brand data came from the import file.



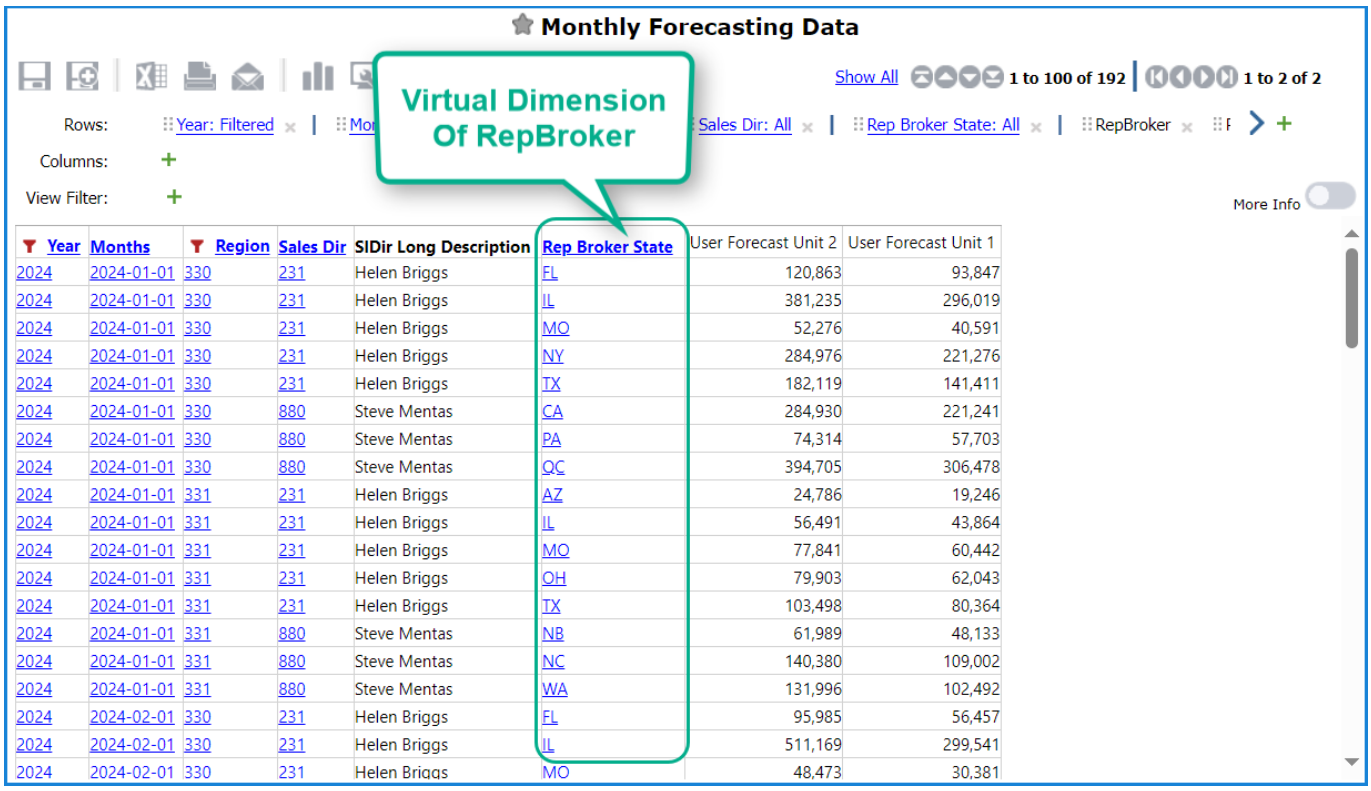
Year	Months	Region	RepBroker	Product Group	Product Brand	User Forecast Unit 2	User Forecast Unit 1
2024	2024-01-01	330	313	10	008	17,593	13,661
2024	2024-01-01	330	313	10	002	23,091	17,930
2024	2024-01-01	330	313	10	005	27,764	21,558
2024	2024-01-01	330	313	10	004	14,340	11,135
2024	2024-01-01	330	313	10	999	87,142	67,664
2024	2024-01-01	330	313	10	006	22,267	17,289
2024	2024-01-01	330	313	10	007	20,296	15,760
2024	2024-01-01	330	313	10	003	41,509	32,231
2024	2024-01-01	330	313	10	001	30,926	24,013
2024	2024-01-01	330	305	10	008	32,850	25,507
2024	2024-01-01	330	305	10	002	59,698	46,354
2024	2024-01-01	330	305	10	005	18,372	14,266
2024	2024-01-01	330	305	10	004	33,171	25,756
2024	2024-01-01	330	305	10	999	48,657	37,781
2024	2024-01-01	330	305	10	006	22,541	17,503
2024	2024-01-01	330	305	10	007	14,157	10,993
2024	2024-01-01	330	305	10	003	23,137	17,965
2024	2024-01-01	330	305	10	001	30,468	23,657
2024	2024-01-01	330	306	10	008	10,629	8,253

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



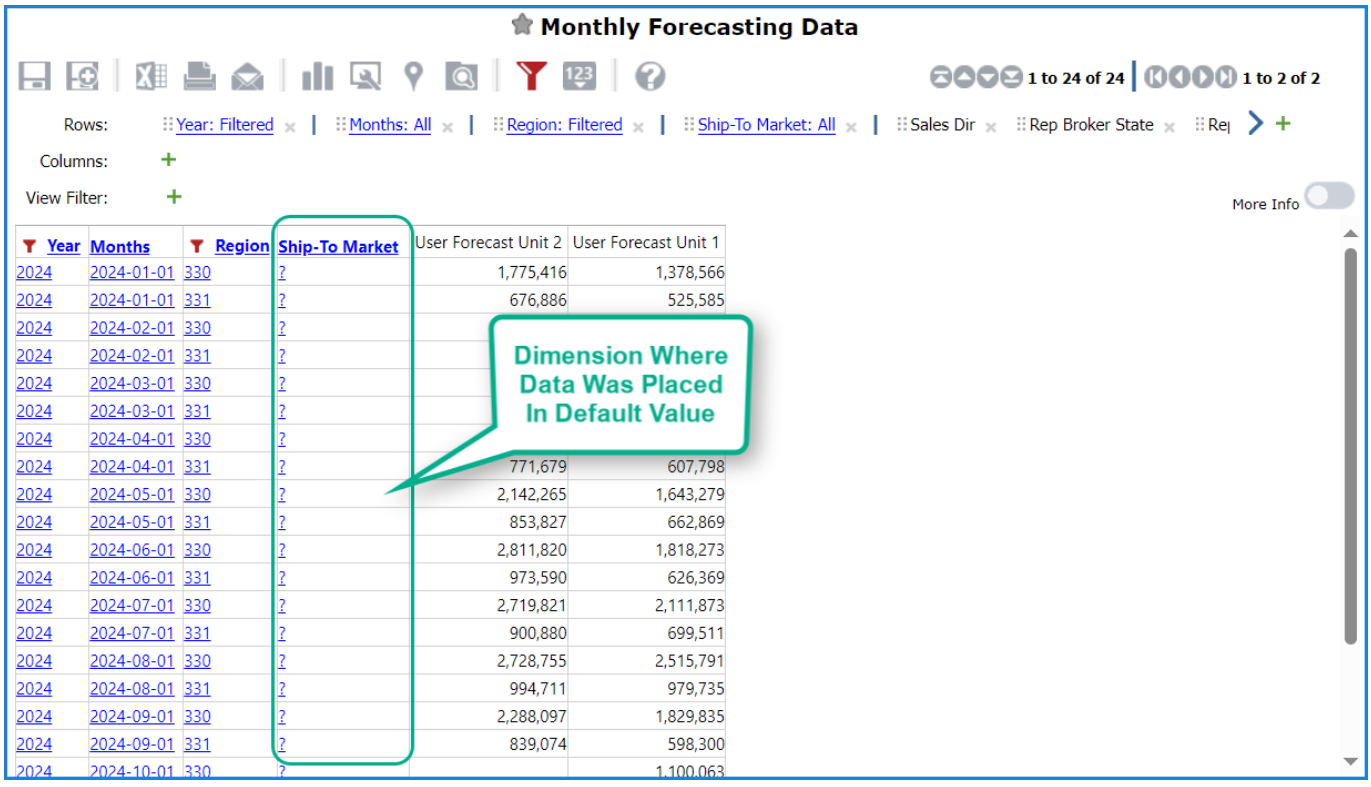
Year	Months	Region	Sales Dir	SIDir Long Description	RepBroker	User Forecast Unit 2	User Forecast Unit 1
2024	2024-01-01	330	231	Helen Briggs	305	283,051	219,782
2024	2024-01-01	330	231	Helen Briggs	306	98,184	76,237
2024	2024-01-01	330	231	Helen Briggs	302	182,119	141,411
2024	2024-01-01	330	231	Helen Briggs	303	52,276	40,591
2024	2024-01-01	330	231	Helen Briggs	300	284,976	221,276
2024	2024-01-01	330	231	Helen Briggs	301	120,863	93,847
2024	2024-01-01	330	880	Steve Mentas	313	284,930	221,241
2024	2024-01-01	330	880	Steve Mentas	312	394,705	306,478
2024	2024-01-01	330	880	Steve Mentas	309	74,314	57,703
2024	2024-01-01	331	231	Helen Briggs	308	79,903	62,043
2024	2024-01-01	331	231	Helen Briggs	307	24,786	19,246
2024	2024-01-01	331	231	Helen Briggs	306	56,491	43,864
2024	2024-01-01	331	231	Helen Briggs	302	103,498	80,364
2024	2024-01-01	331	231	Helen Briggs	303	77,841	60,442
2024	2024-01-01	331	880	Steve Mentas	304	140,380	109,002
2024	2024-01-01	331	880	Steve Mentas	315	131,996	102,492
2024	2024-01-01	331	880	Steve Mentas	318	61,989	48,133
2024	2024-02-01	330	231	Helen Briggs	305	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.



Year	Months	Region	Sales Dir	SIDir Long Description	Rep Broker State	User Forecast Unit 2	User Forecast Unit 1
2024	2024-01-01	330	231	Helen Briggs	FL	120,863	93,847
2024	2024-01-01	330	231	Helen Briggs	IL	381,235	296,019
2024	2024-01-01	330	231	Helen Briggs	MO	52,276	40,591
2024	2024-01-01	330	231	Helen Briggs	NY	284,976	221,276
2024	2024-01-01	330	231	Helen Briggs	TX	182,119	141,411
2024	2024-01-01	330	880	Steve Mentas	CA	284,930	221,241
2024	2024-01-01	330	880	Steve Mentas	PA	74,314	57,703
2024	2024-01-01	330	880	Steve Mentas	QC	394,705	306,478
2024	2024-01-01	331	231	Helen Briggs	AZ	24,786	19,246
2024	2024-01-01	331	231	Helen Briggs	IL	56,491	43,864
2024	2024-01-01	331	231	Helen Briggs	MO	77,841	60,442
2024	2024-01-01	331	231	Helen Briggs	OH	79,903	62,043
2024	2024-01-01	331	231	Helen Briggs	TX	103,498	80,364
2024	2024-01-01	331	880	Steve Mentas	NB	61,989	48,133
2024	2024-01-01	331	880	Steve Mentas	NC	140,380	109,002
2024	2024-01-01	331	880	Steve Mentas	WA	131,996	102,492
2024	2024-02-01	330	231	Helen Briggs	FL	95,985	56,457
2024	2024-02-01	330	231	Helen Briggs	IL	511,169	299,541
2024	2024-02-01	330	231	Helen Briggs	MO	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.



Year	Months	Region	Ship-To Market	User Forecast Unit 2	User Forecast Unit 1
2024	2024-01-01	330	?	1,775,416	1,378,566
2024	2024-01-01	331	?	676,886	525,585
2024	2024-02-01	330	?		
2024	2024-02-01	331	?		
2024	2024-03-01	330	?		
2024	2024-03-01	331	?		
2024	2024-04-01	330	?		
2024	2024-04-01	331	?	771,679	607,798
2024	2024-05-01	330	?	2,142,265	1,643,279
2024	2024-05-01	331	?	853,827	662,869
2024	2024-06-01	330	?	2,811,820	1,818,273
2024	2024-06-01	331	?	973,590	626,369
2024	2024-07-01	330	?	2,719,821	2,111,873
2024	2024-07-01	331	?	900,880	699,511
2024	2024-08-01	330	?	2,728,755	2,515,791
2024	2024-08-01	331	?	994,711	979,735
2024	2024-09-01	330	?	2,288,097	1,829,835
2024	2024-09-01	331	?	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.

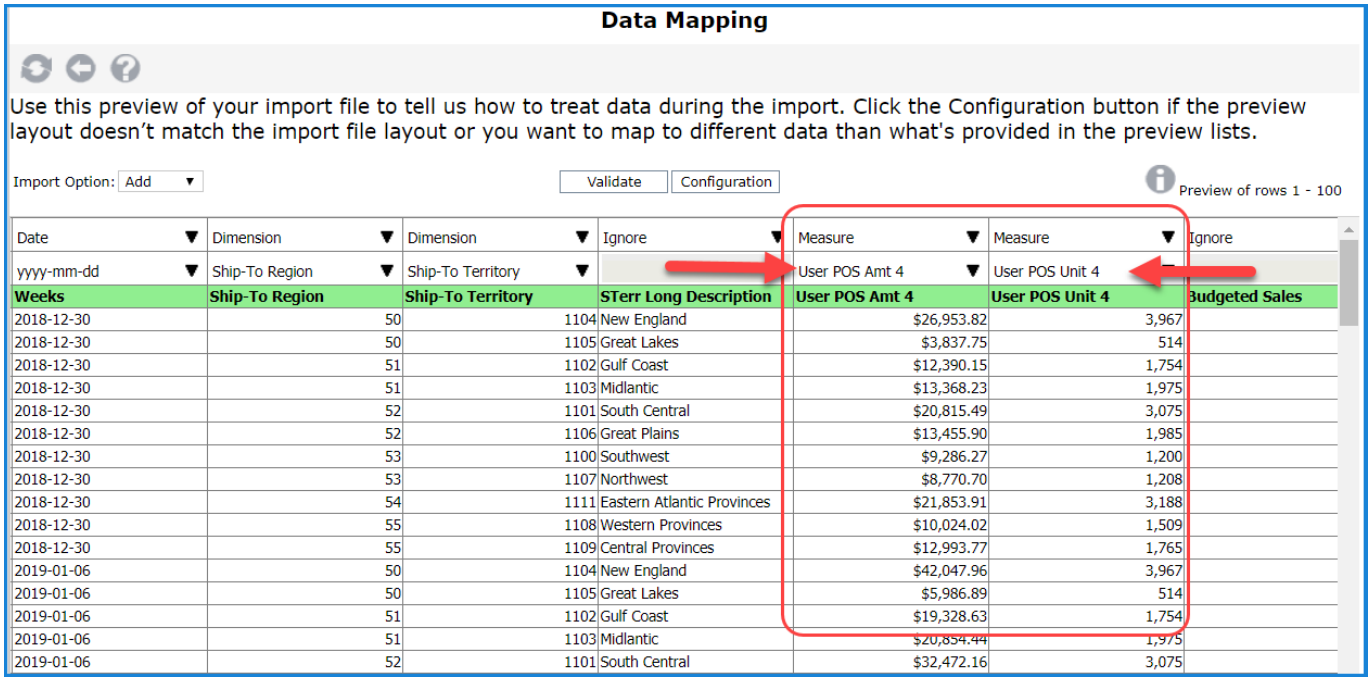
The Stratum Cloud API also can be used by an app, website, or services — for example with an Azure portal's Azure Data Factory. In that scenario, the API could be called upon to import data from an Azure Data Pipeline. Features specific to your implementation, in this case your Azure Data Factory, would 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.

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

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

Example 1

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



Data Mapping

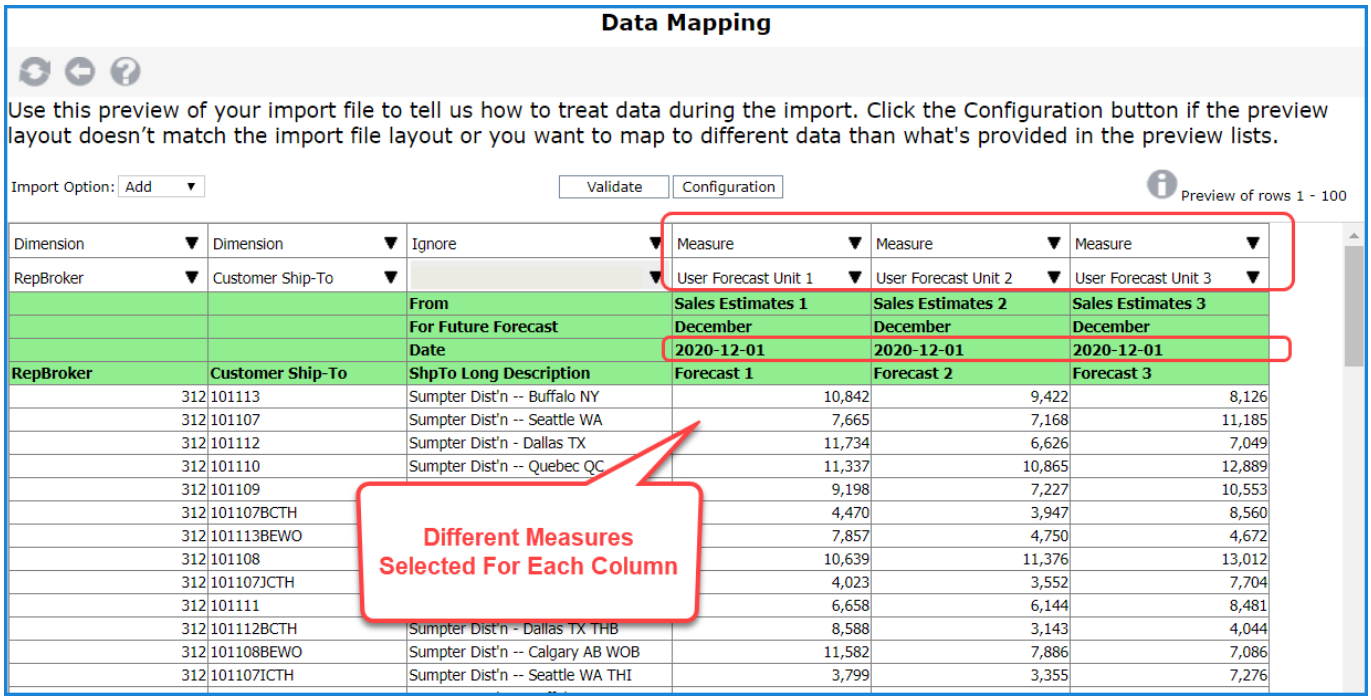
Use this preview of your import file to tell us how to treat data during the import. Click the Configuration button if the preview layout doesn't match the import file layout or you want to map to different data than what's provided in the preview lists.

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

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

Example 2

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

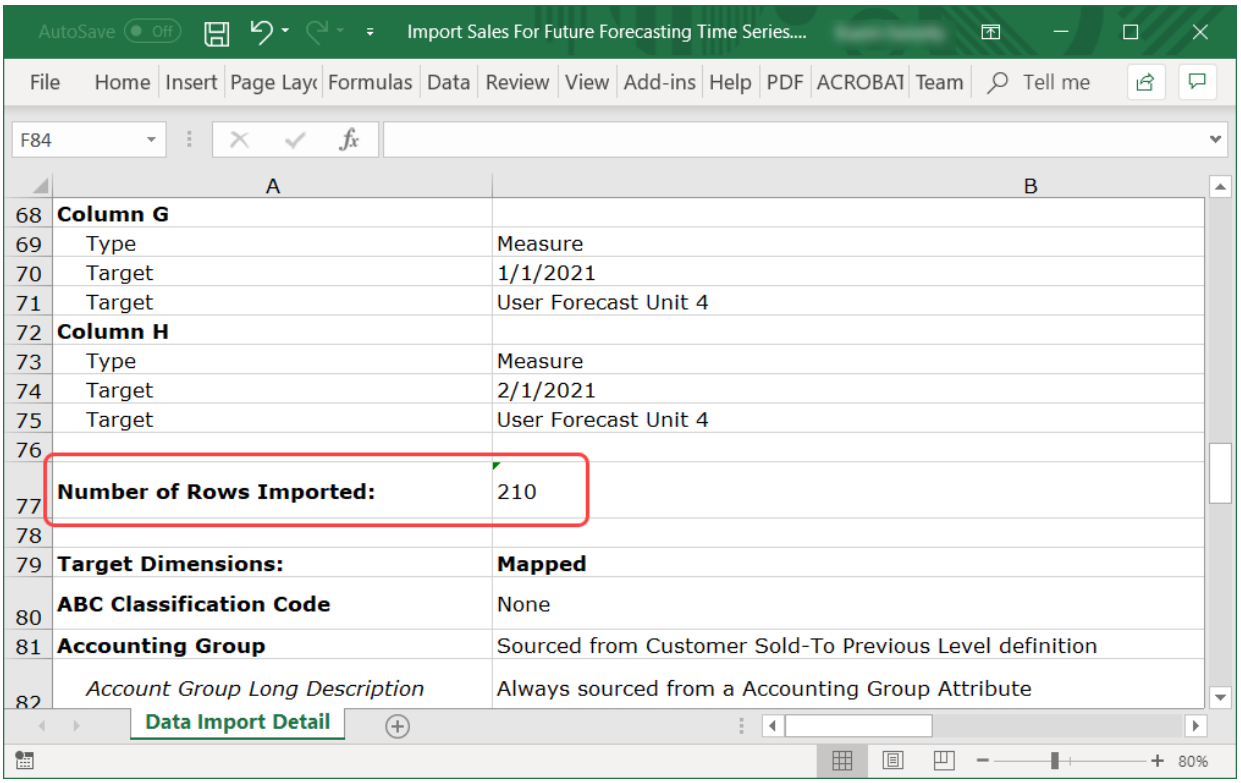


Dimension	Dimension	Ignore	Measure	Measure	Measure
RepBroker	Customer Ship-To		User Forecast Unit 1	User Forecast Unit 2	User Forecast Unit 3
		From	Sales Estimates 1	Sales Estimates 2	Sales Estimates 3
		For Future Forecast	December	December	December
		Date	2020-12-01	2020-12-01	2020-12-01
RepBroker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

How Many Rows From My Import File Got Imported?

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

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

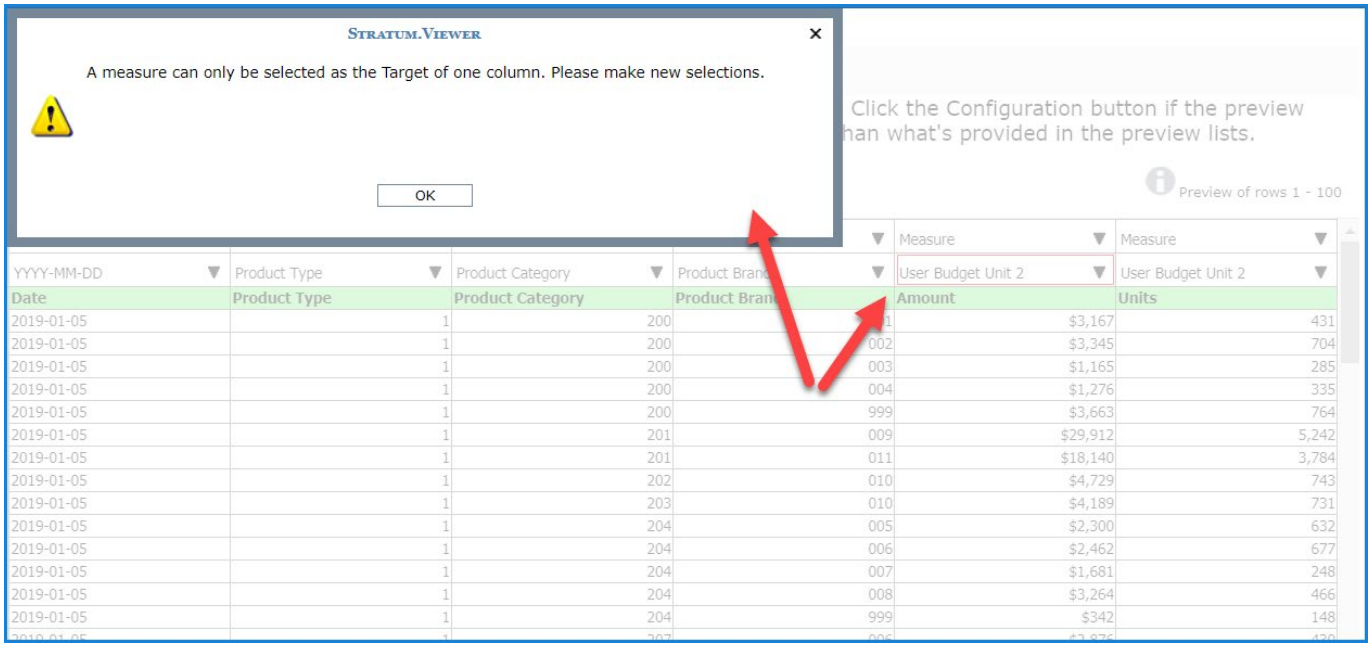


What Does a "Measure Can Be Only Selected as the Target of One Column" Message Mean?

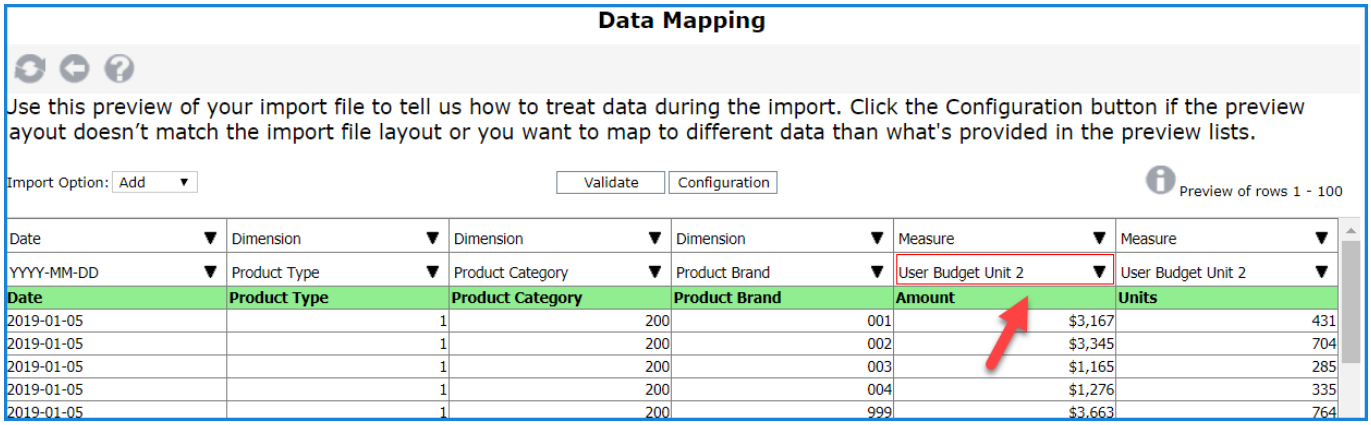
That means more than one column has been mapped to the same measure. In import sources where dates are in every row, each measure needs its own dedicated column.

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.

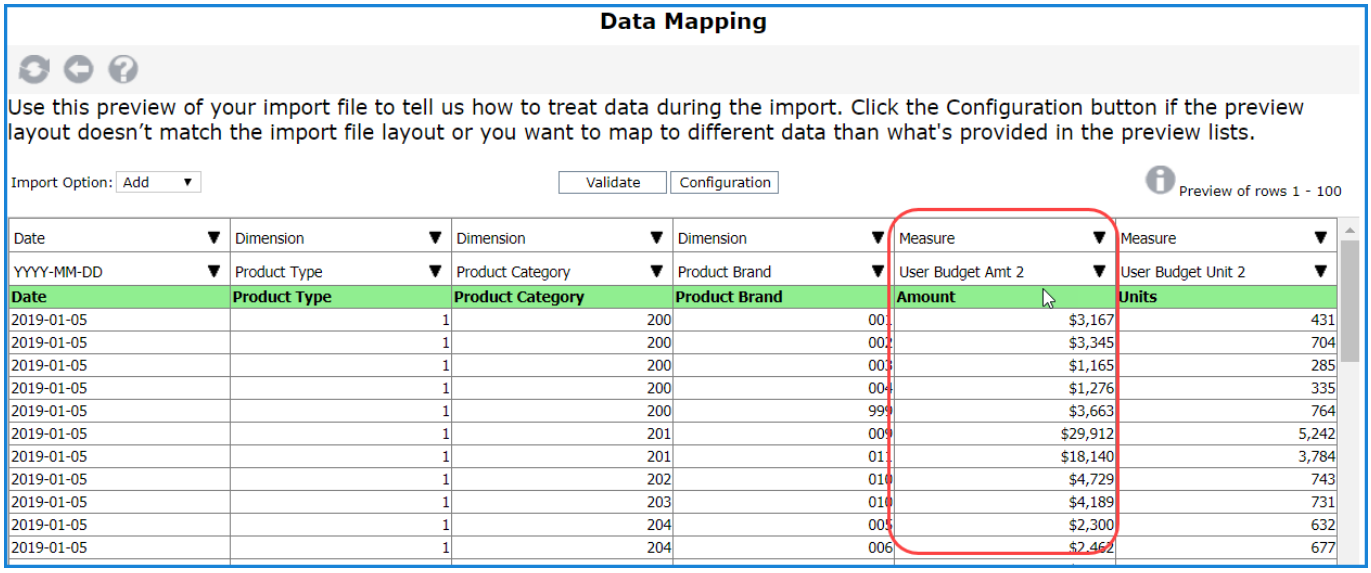
In the following example, two columns were mapped to User Budget Unit 2. Changing one of the column mappings to a different measure will correct the issue.



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



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



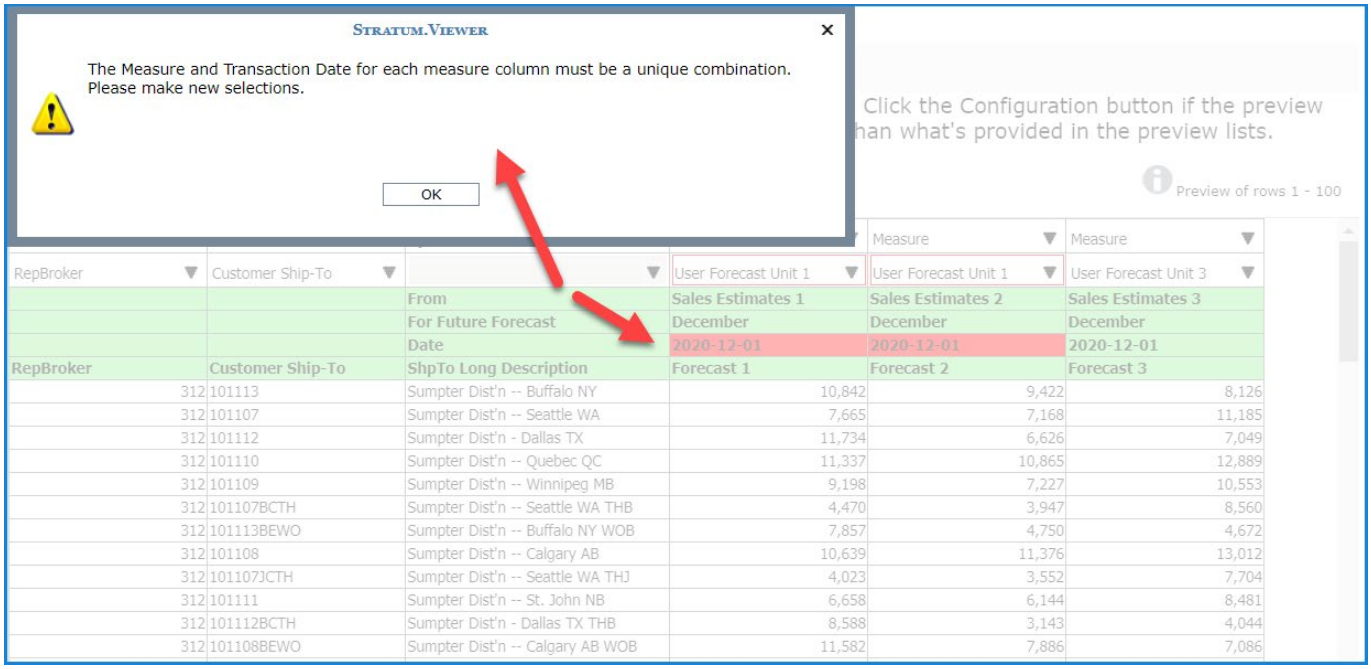
Date	Dimension	Dimension	Dimension	Measure	Measure
YYYY-MM-DD	Product Type	Product Category	Product Brand	User Budget Amt 2	User Budget Unit 2
Date	**Product Type**	**Product Category**	**Product Brand**	**Amount**	**Units**
2019-01-05	1	200	001	$3,167	431
2019-01-05	1	200	002	$3,345	704
2019-01-05	1	200	003	$1,165	285
2019-01-05	1	200	004	$1,276	335
2019-01-05	1	200	999	$3,663	764
2019-01-05	1	201	009	$29,912	5,242
2019-01-05	1	201	011	$18,140	3,784
2019-01-05	1	202	010	$4,729	743
2019-01-05	1	203	010	$4,189	731
2019-01-05	1	204	005	$2,300	632
2019-01-05	1	204	006	$2,462	677

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

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

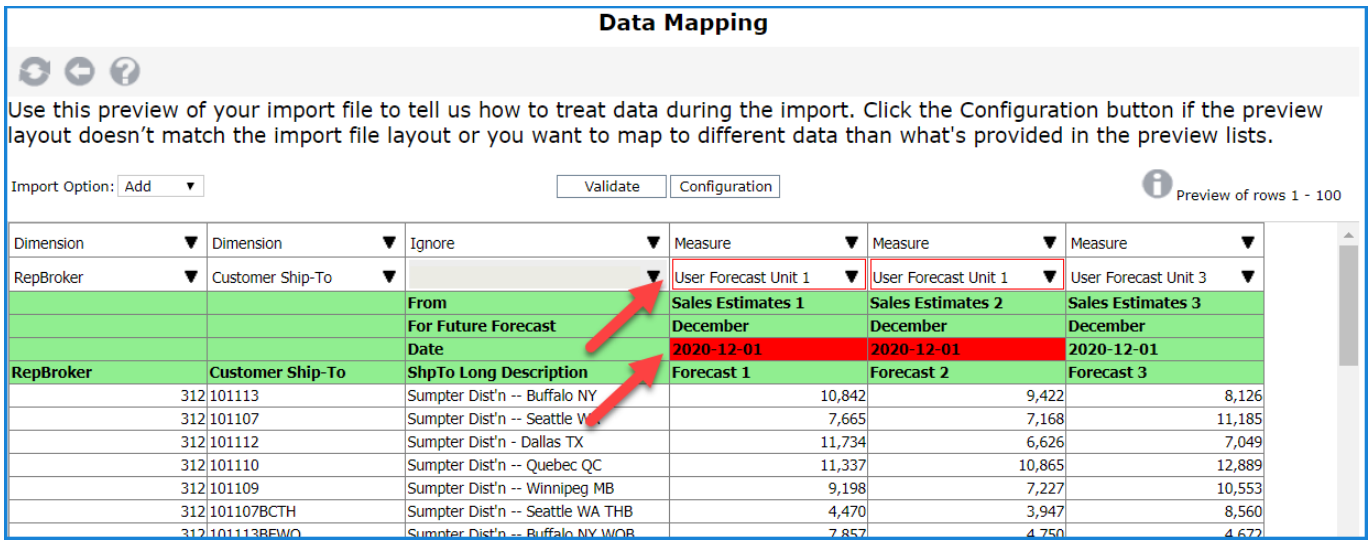
Adjust your mapping selections to create unique measure/date combinations in the mapping window. You may need to cancel your import and adjust the import source, for example, adjust dates in the header row or combine columns that had data for the same measure/date instances into one column.

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.



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



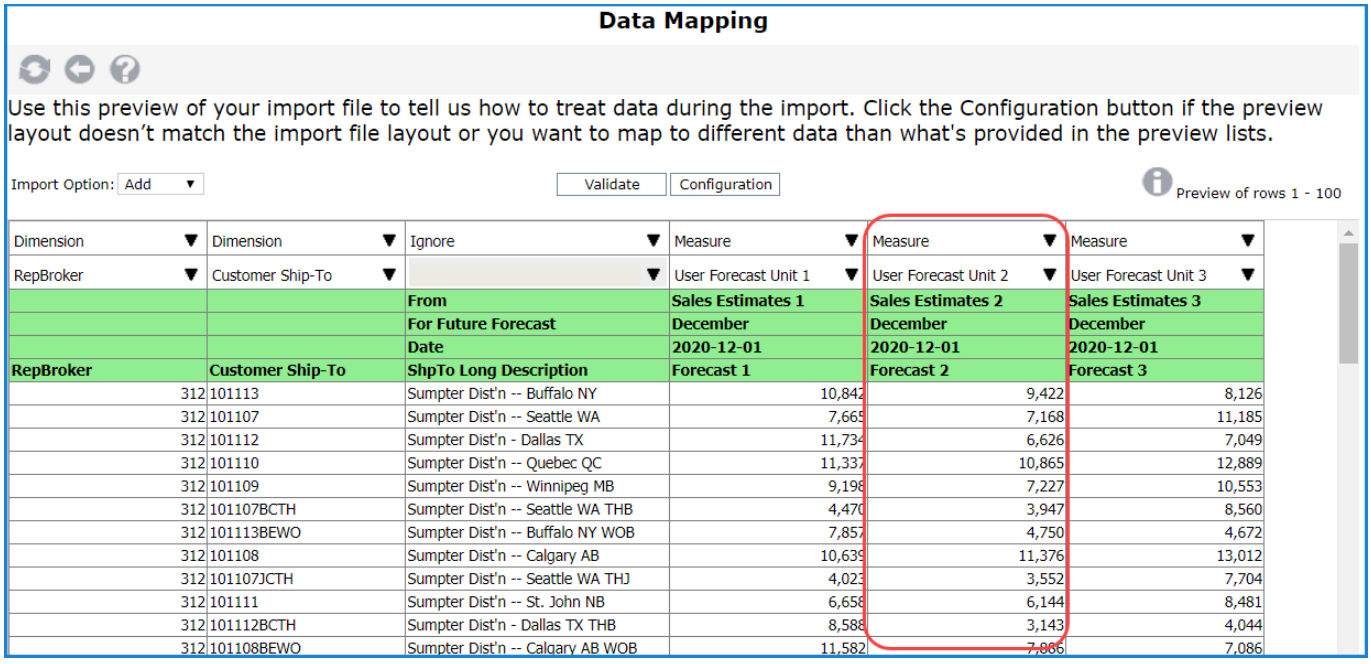
Data Mapping

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

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

Dimension	Dimension	Ignore	Measure	Measure	Measure
RepBroker	Customer Ship-To		User Forecast Unit 1	User Forecast Unit 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

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

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

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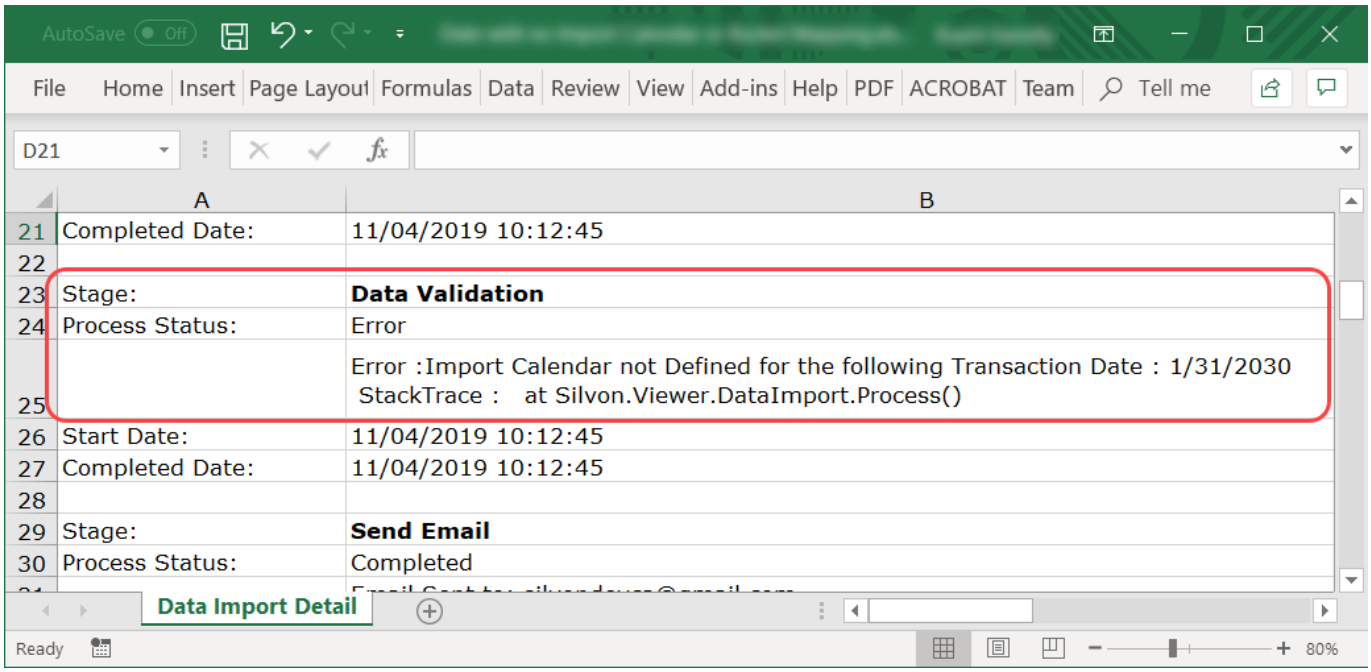
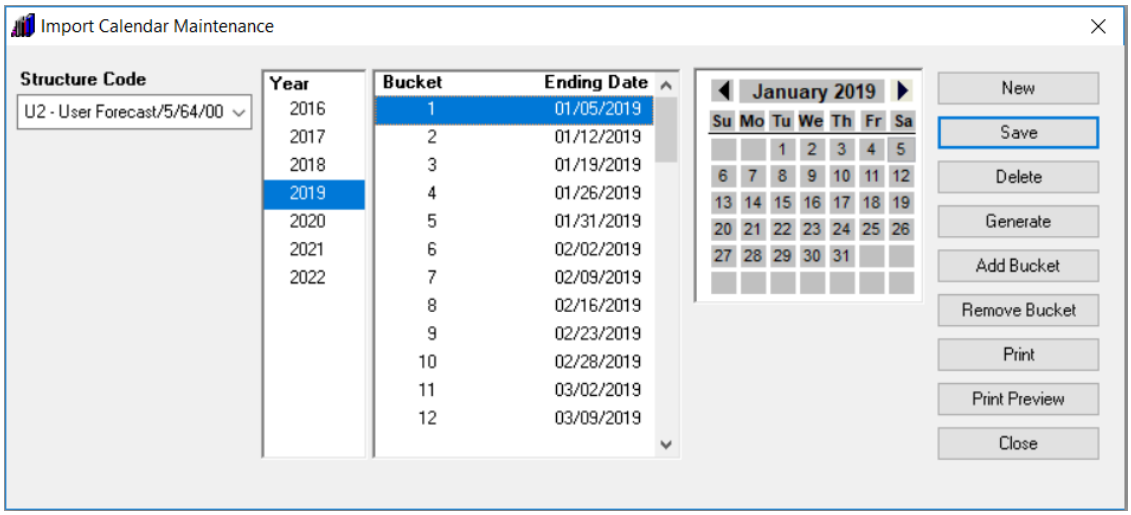
312	101107BCTH	Sumpter Dist'n -- Seattle WA THB	4,470	3,947	8,560
312	101113BEWO	Sumpter Dist'n -- Buffalo NY WOB	7,857	4,750	4,672
312	101108	Sumpter Dist'n -- Calgary AB	10,639	11,376	13,012
312	101107JCTH	Sumpter Dist'n -- Seattle WA THJ	4,023	3,552	7,704
312	101111	Sumpter Dist'n -- St. John NB	6,658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

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

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

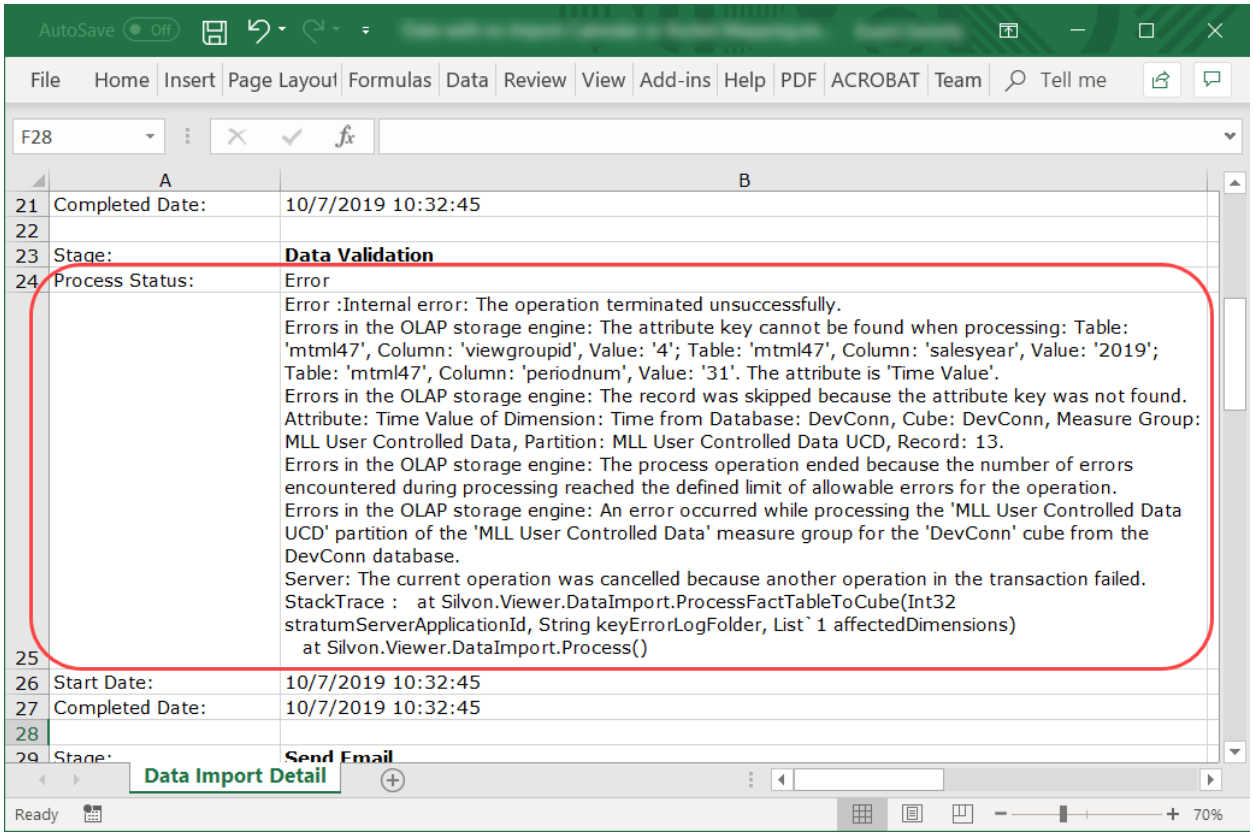




What Does an "OLAP Storage Engine Attribute Key Cannot Be Found" Processing Error Mean?

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

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



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

Changing a category that your company has already designated as User or Data Steward controlled (ones with Enhanced architecture) to Corporate controlled (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 Category maintenance 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".

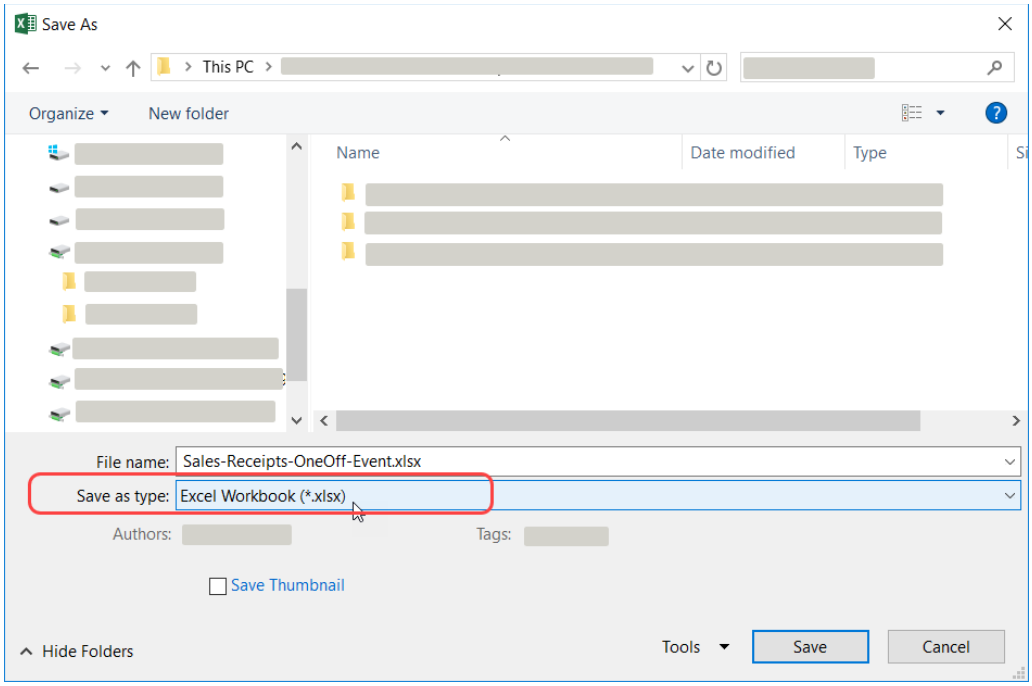
A work around for this scenario is to split up your import into multiple, smaller files or tables each with less rows and/or columns of data. Divide the data up into smaller sources and import each one separately.

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?

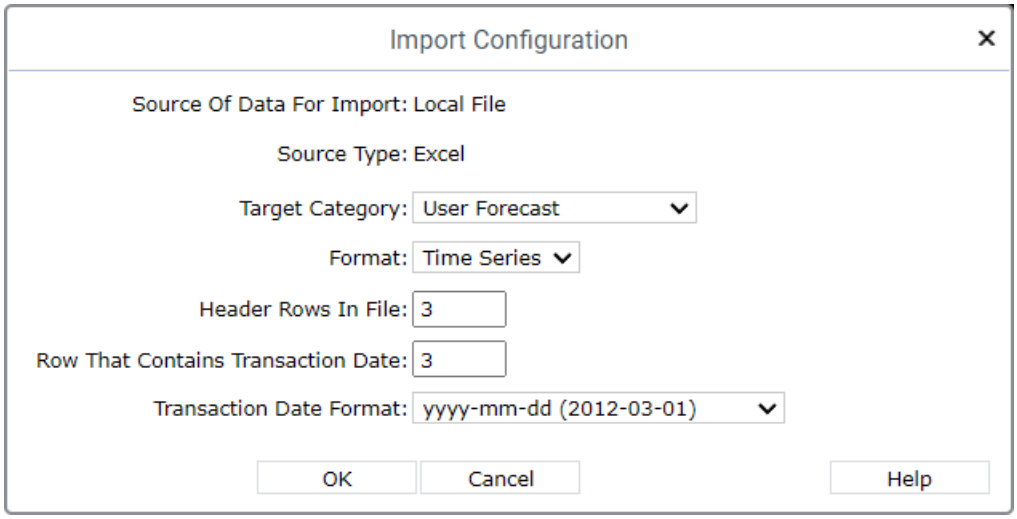
If you upload an Excel import file and something looks off with the display of dates or times in the Data Mapping window preview, check the format of the Excel import file. Those types of files need to be saved as Excel Workbooks when you set them up in Excel. If you saved it in another format such as 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.

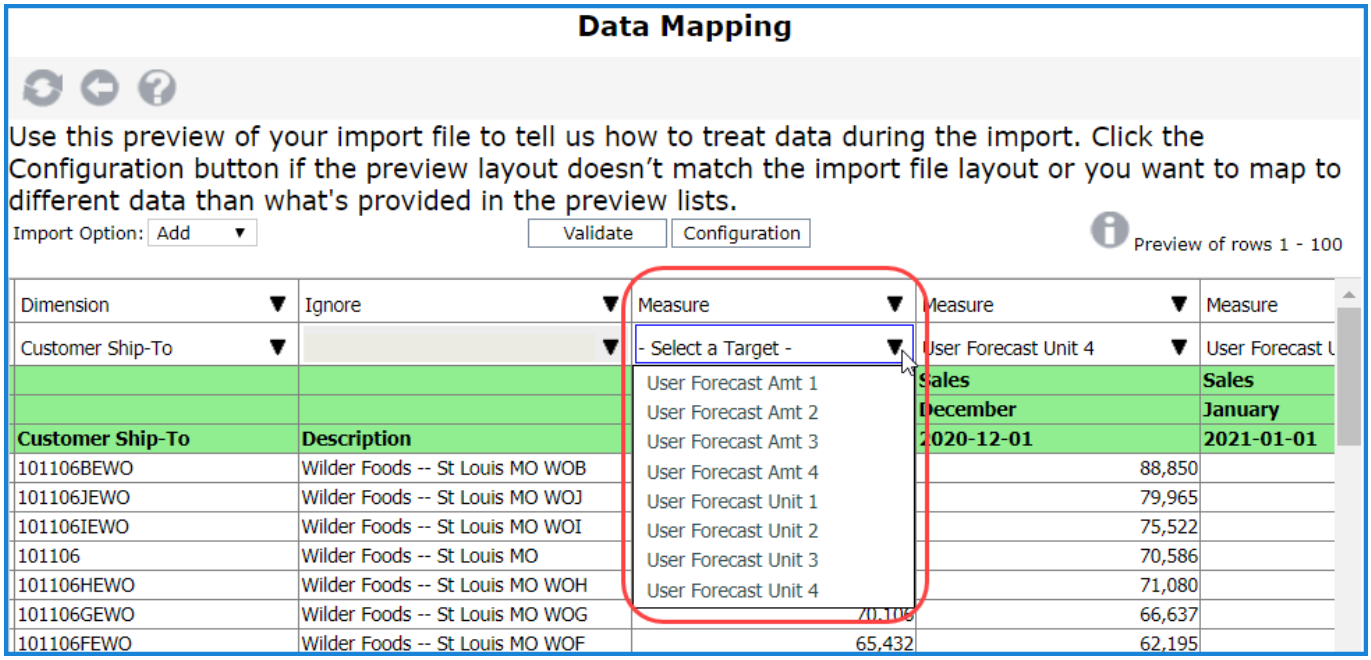


Why Aren't Some Measures Showing as Options When I Map Data for an Import?

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

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





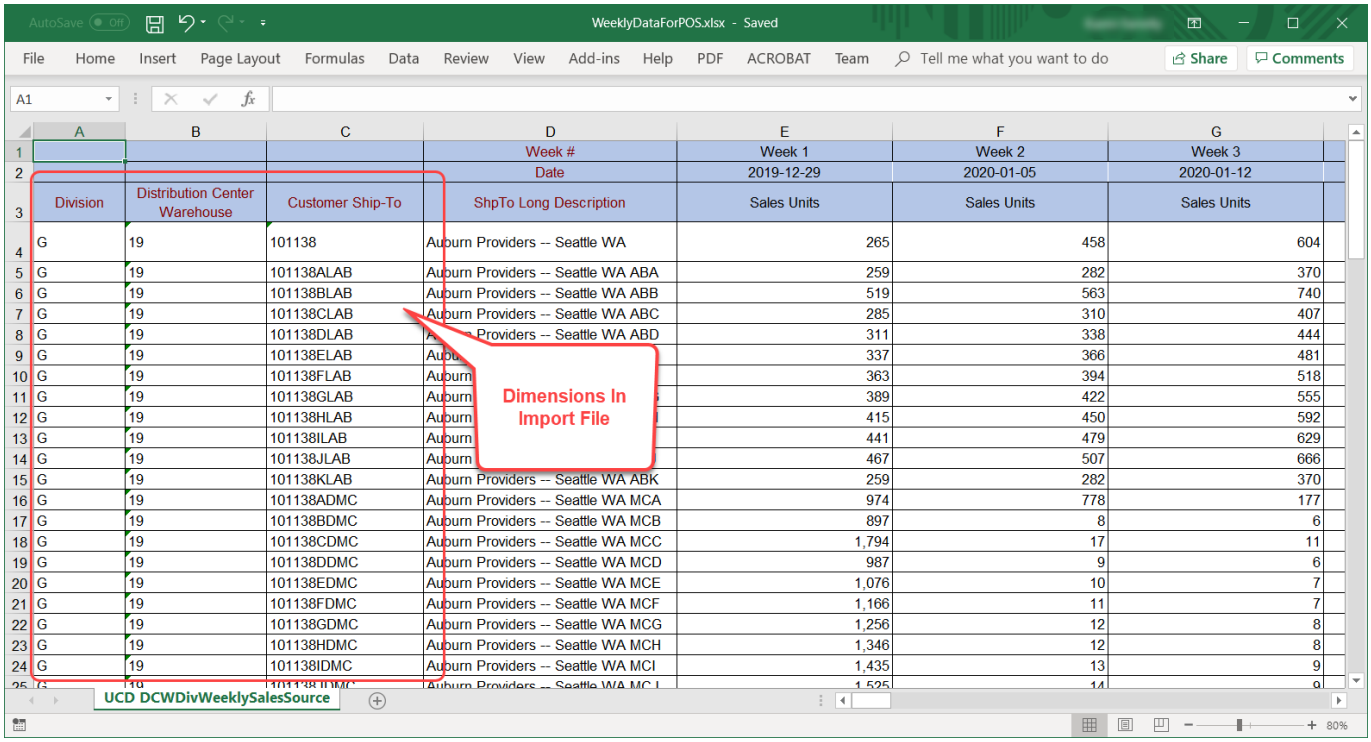
Why Did Import Data Get Added To A Dimension's Default Value '?' Member?

If you see imported data in a dimension's default value*, that's an indicator that the dimension wasn't included in your import 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.

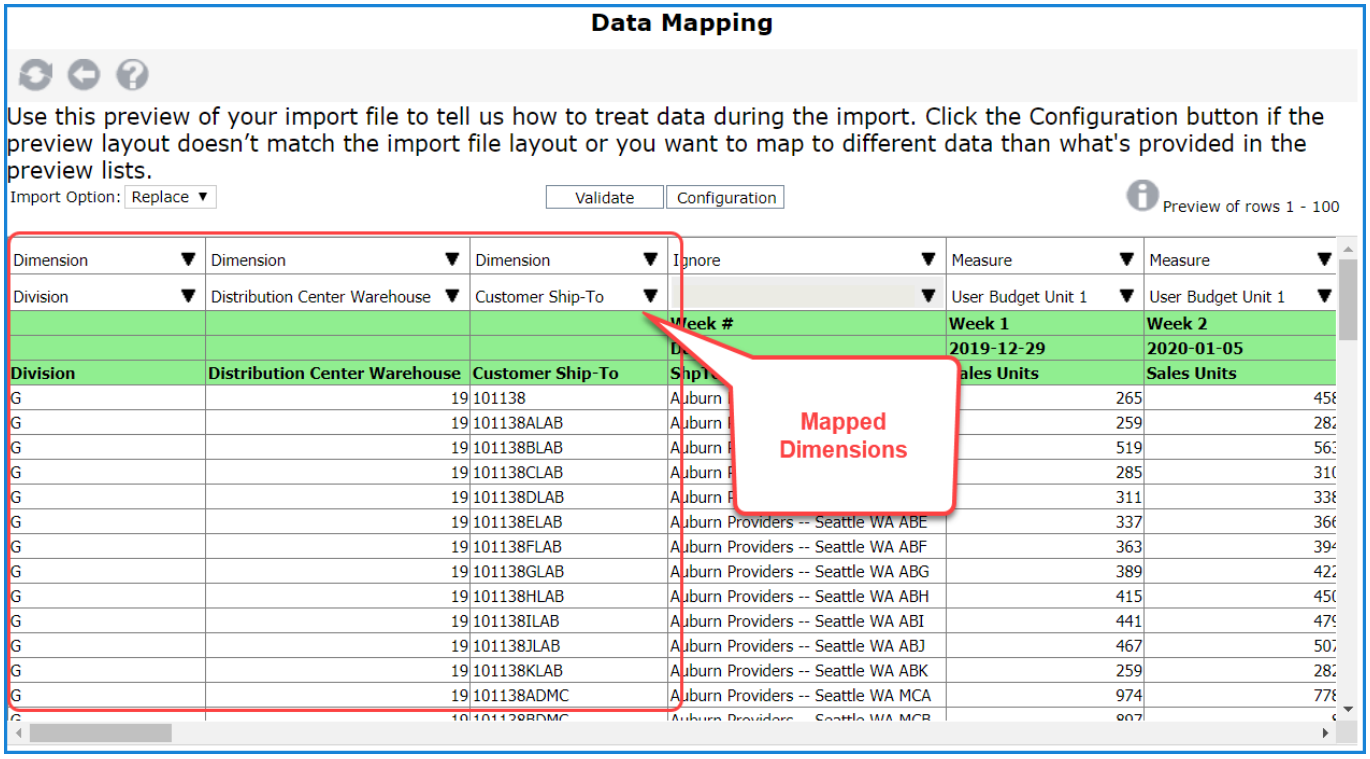
Example 1: Dimension Wasn't In Import File

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.



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

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



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

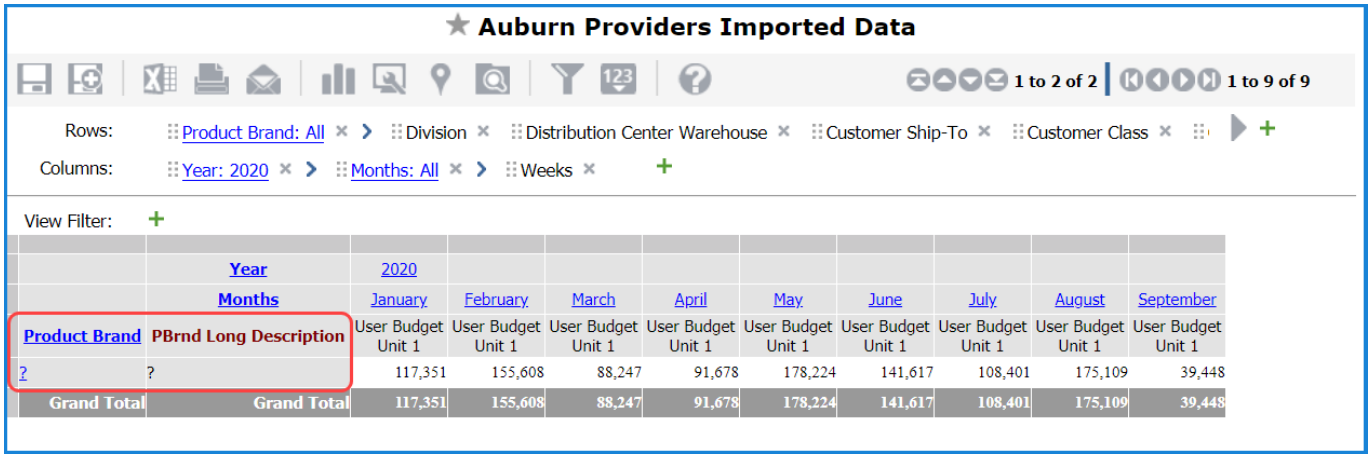
Here's part of the Data Mapping section from the import's processing report, showing the three mapped dimensions. Import data goes directly to them, so a description of **"Import File"** shows up next to them. Dimensions with **"None"** listed next to them are the ones for which imported data will only 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
238	*Distribution Center Warehouse State*	Always sourced from a Distribution Center Warehouse Attribute
239	**Distribution Channel**	None
240	**Division**	Import File
241	*Division City*	Always sourced from a Division Attribute
242	**Lot**	None

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

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

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



Auburn Providers Imported Data

1 to 2 of 2 | 1 to 9 of 9

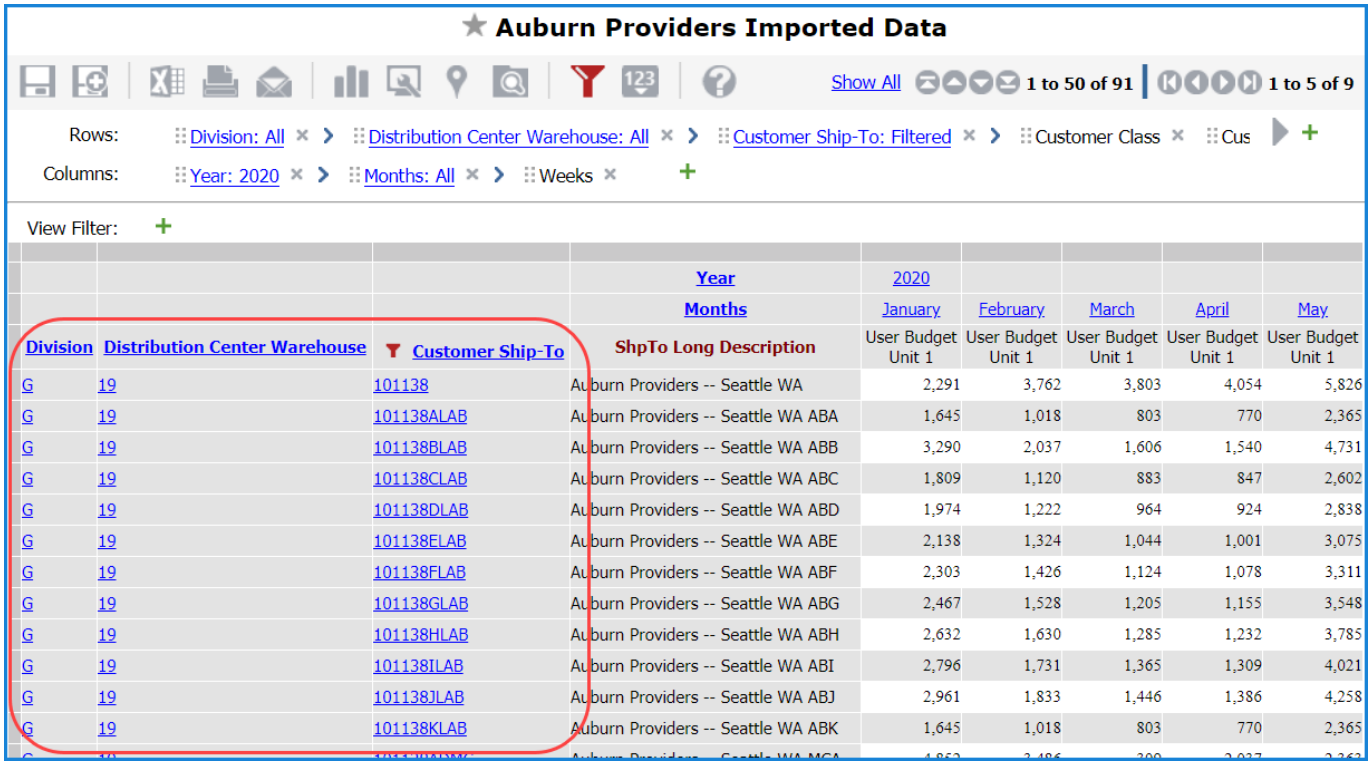
Rows: Product Brand: All × › Division × Distribution Center Warehouse × Customer Ship-To × Customer Class ×

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

View Filter:

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

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



Auburn Providers Imported Data

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

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

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

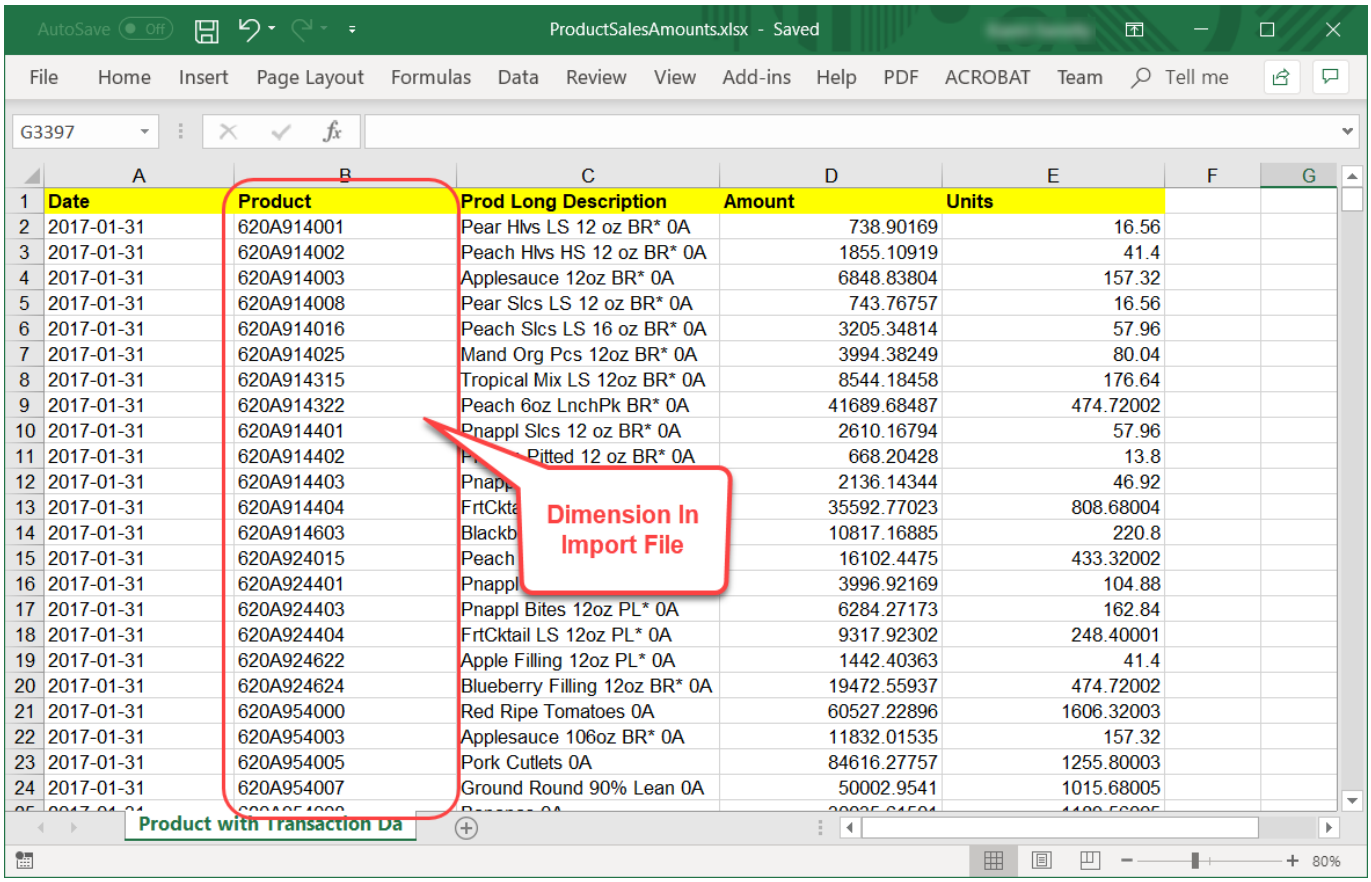
View Filter:

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

Example 2: Incomplete Previous Level Data For A Dimension

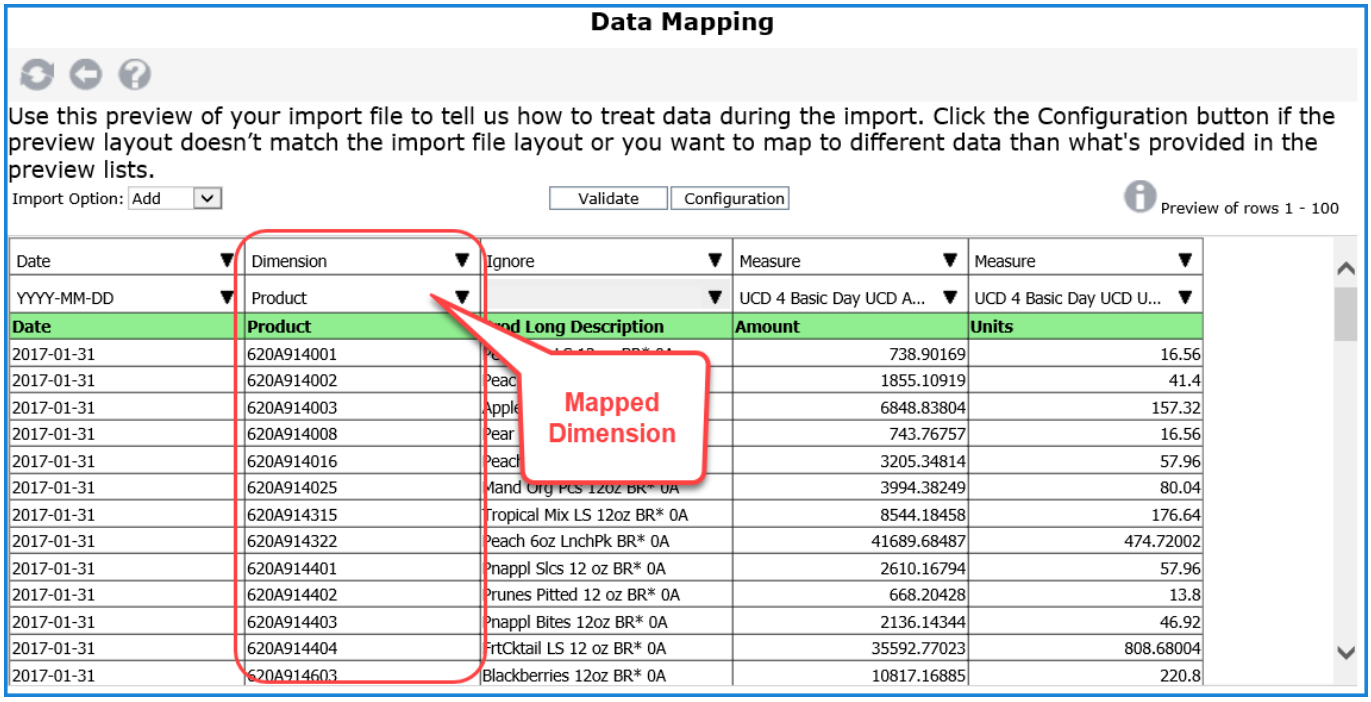
Here's a case where some data for a dimension was put in its default value while other data was placed in non-default values. That happened because there wasn't complete previous level data defined between the mapped dimension and the previous level dimension. If the previous level data is incomplete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

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



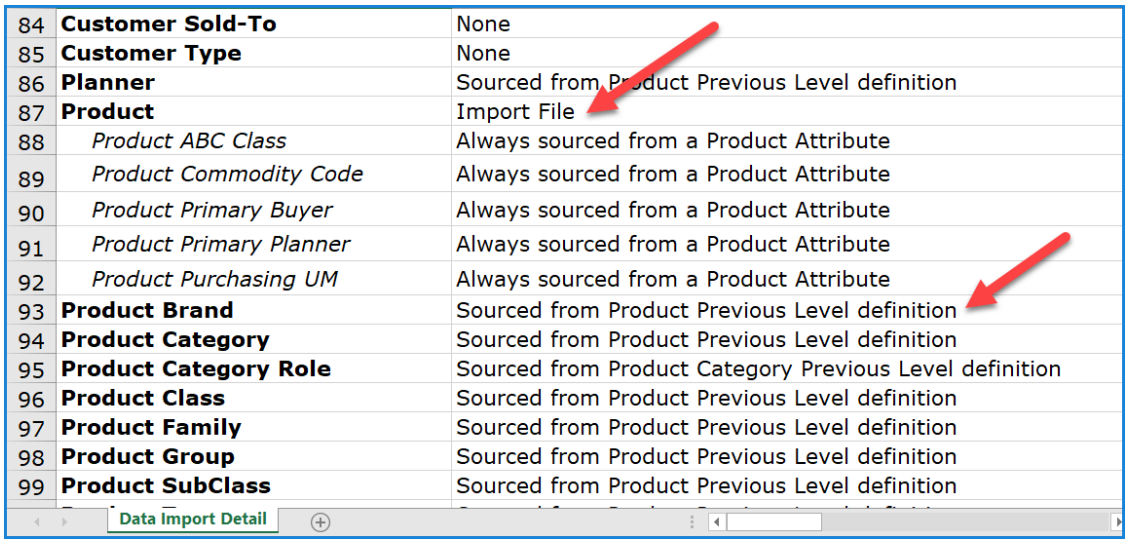
	A	B	C	D	E	F	G
1	Date	Product	Prod Long Description	Amount	Units		
2	2017-01-31	620A914001	Pear Hlvs LS 12 oz BR* 0A	738.90169	16.56		
3	2017-01-31	620A914002	Peach Hlvs HS 12 oz BR* 0A	1855.10919	41.4		
4	2017-01-31	620A914003	Applesauce 12oz BR* 0A	6848.83804	157.32		
5	2017-01-31	620A914008	Pear Slcs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

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



Date	Product	Long Description	Amount	Units
2017-01-31	620A914001		738.90169	16.56
2017-01-31	620A914002		1855.10919	41.4
2017-01-31	620A914003		6848.83804	157.32
2017-01-31	620A914008		743.76757	16.56
2017-01-31	620A914016		3205.34814	57.96
2017-01-31	620A914025		3994.38249	80.04
2017-01-31	620A914315	Tropical Mix LS 12oz BR* 0A	8544.18458	176.64
2017-01-31	620A914322	Peach 6oz LnchPk BR* 0A	41689.68487	474.72002
2017-01-31	620A914401	Pnappl 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.

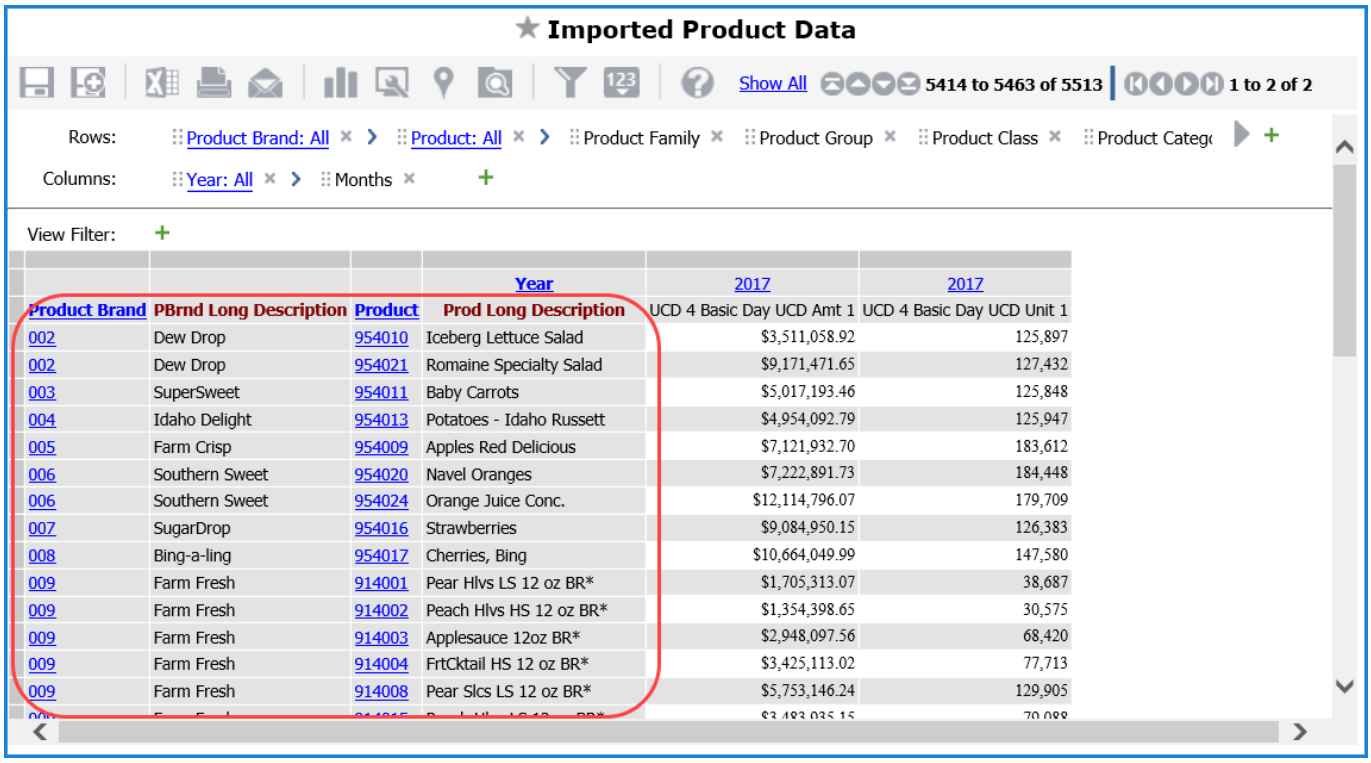


84	**Customer Sold-To**	None
85	**Customer Type**	None
86	**Planner**	Sourced from Product Previous Level definition
87	**Product**	Import File
88	*Product ABC Class*	Always sourced from a Product Attribute
89	*Product Commodity Code*	Always sourced from a Product Attribute
90	*Product Primary Buyer*	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

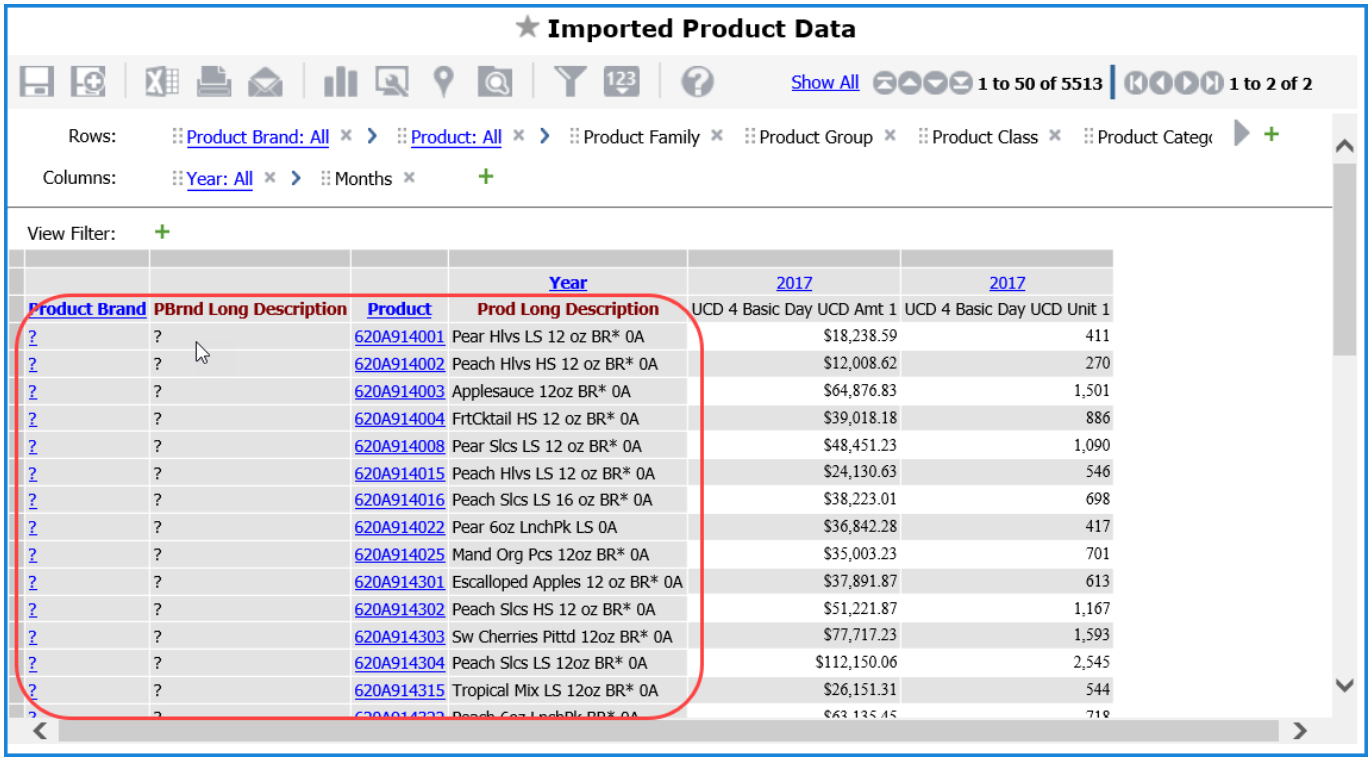
Data Import Detail

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.



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



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

Why Did Less Data Than Expected Get Imported?

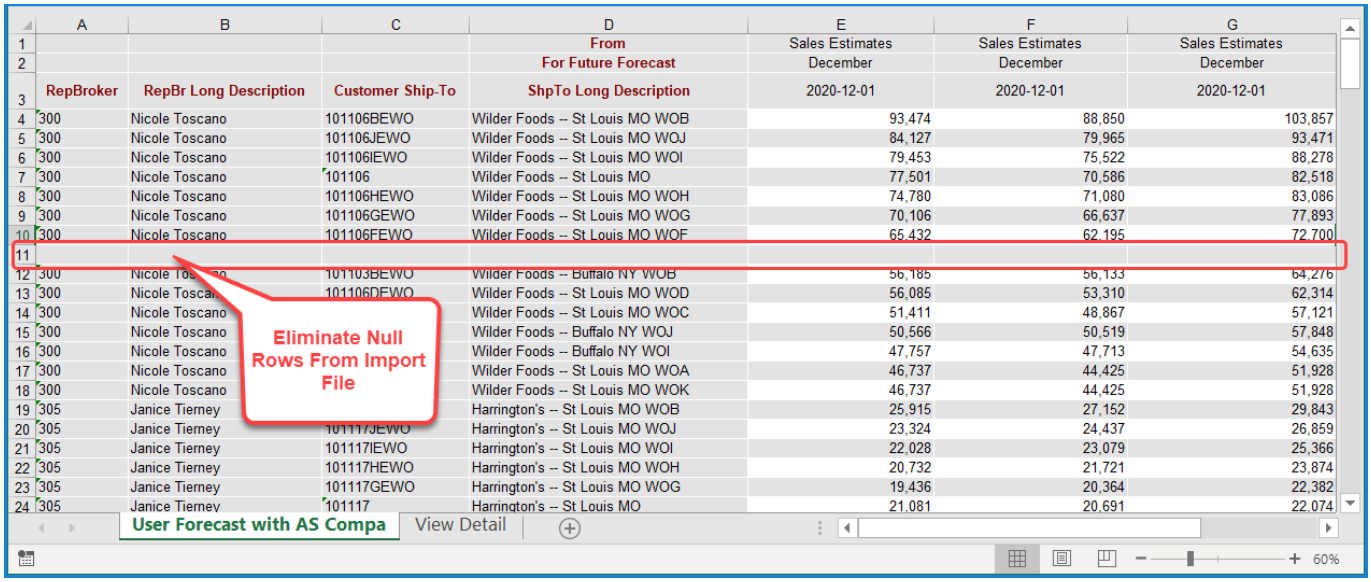
Here's some things to consider if you or other users aren't seeing some or any of the imported data you expected to see when you opened views to work with the data.

- Make sure the import is done processing. Check for a Completed status in the Data Import list window.
- Make sure the view includes the dimensions impacted by the import and you are looking at the time period(s) for which data was imported.
- Verify the user has read access to all the data – in this case, to the dimensions where data got imported. That can be verified by administrators, who can look at a user's role and user profile.
- The data may have ended up in a dimension's default value of "?". If the view where you expected to see the data has a filter applied to filter out the "?" default value, remove the filter and look at the default value. Then see if the imported data displays in the view for that default value. See also Why Did Import Data Get Added To A Dimension's Default Value '?' Member?.
- To further investigate what got imported, review details in the import processing report and compare them to your import file or table. The report tells you which tells got imported and how many rows were imported. See Review Processing Details For A Data Import.
    - It's possible the import 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 Data Mapping window's 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.



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

Why Did More Data Than Expected Get Imported?

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

- You meant to mark some columns as Ignore in the Data Mapping window but forgot to do so before processing the import.
- There were hidden rows in your import 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 Review Processing Details For A Data Import.

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

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

That can happen if your import file 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 Data Mapping window.

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

A few things can influence email delivery.

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

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

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

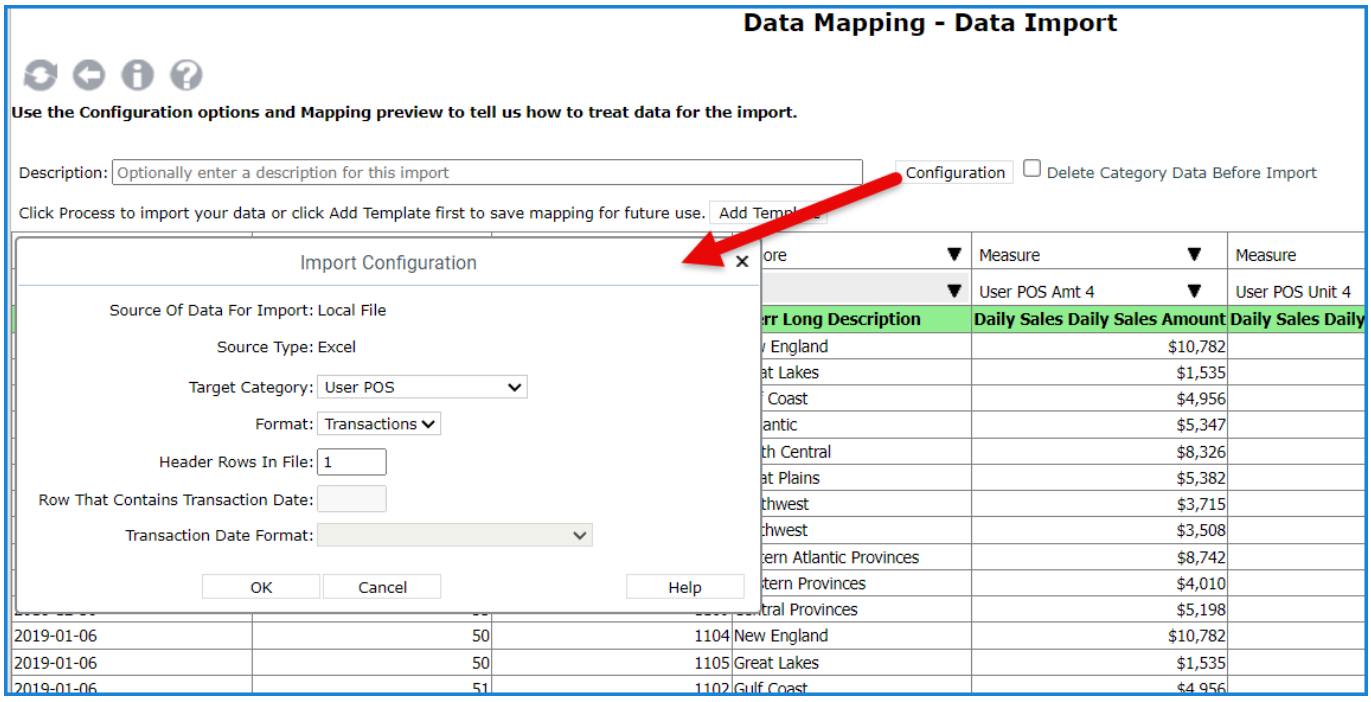
If you are an administrator who was expecting email notifications every time someone processes an import, settings in System Configuration must be set up first to support those emails. See the topic Send Automatic Email Notifications About The Processing of Data Imports.

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 Data Mapping 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.



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

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

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

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

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

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

Why Were Negative Numbers Treated as Positive Numbers?

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

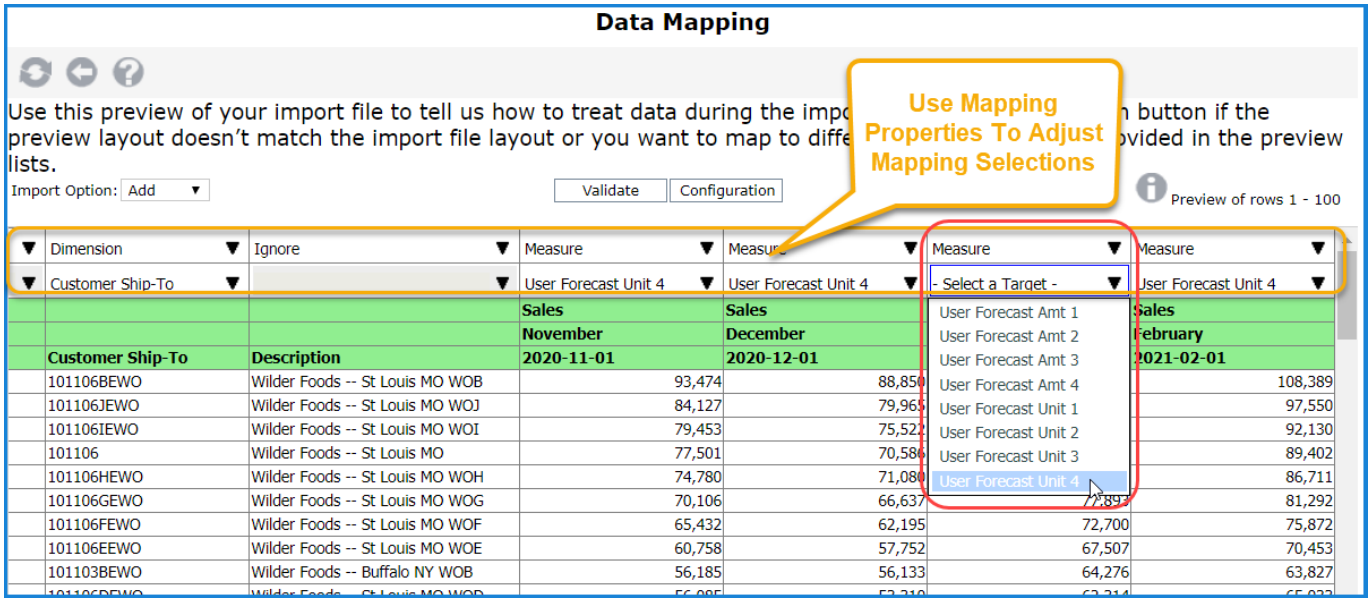
Amount	Return Amount
$28,124,735	($199,899)
$26,028,244	($344,221)
$33,241,865	($508,068)
$24,524,936	($174,813)
$32,516,111	($504,947)
$24,129,027	($225,593)
$33,329,323	($413,073)
$56,729,303	($421,539)
$29,718,949	($412,296)
$31,429,233	($409,534)
$19,792,199	($459,813)
$50,490,321	($691,327)

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

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

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

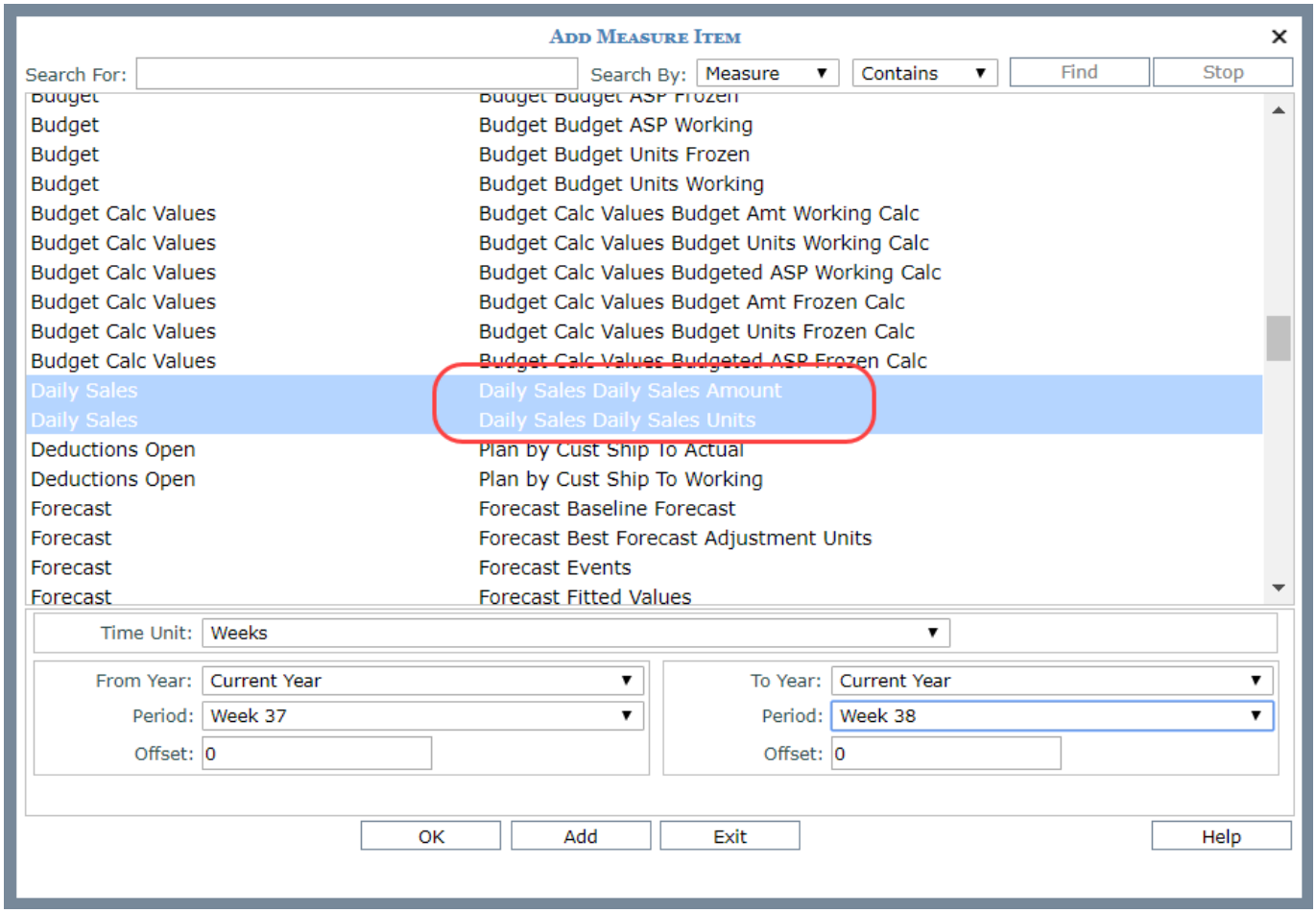
Measure

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.

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

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


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

Regular Measure Item

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

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

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

View Name: *Daily Sales by Customer Type*

View Filter

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

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.