

How-To: Copy Data in Bulk and Save Versioning Configurations in Modeler



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Updated 4 months ago

Bulk-copy data with the **Versioning** tool to quickly create new budgets or scenarios from your existing data.

Why use this feature?

Versioning is a flexible tool that lets you copy data from one part of your data model to another. It's especially useful for creating budgets--For example, by copying last year's actuals or budgets into the upcoming year's budget to establish a baseline for contributors.

While budgeting is the most common use case, Versioning's ability to copy large volumes of intersection data also supports other scenarios, such as:

- Modeling What-If scenarios by duplicating budget versions from a single template.
- Clearing data by copying blank values into target intersections using the Clear Destination Values option.

In this article, you'll learn how to:

- Use Versioning for basic data copying tasks.
- Leverage advanced options for more complex scenarios.
- Remove data from intersections using Versioning.

Before you begin

To complete the steps outlined in this article, you will need at least **Modeler** access. If Data Permissions are set up in your environment, you will also need the appropriate permissions for the data that you are working with.

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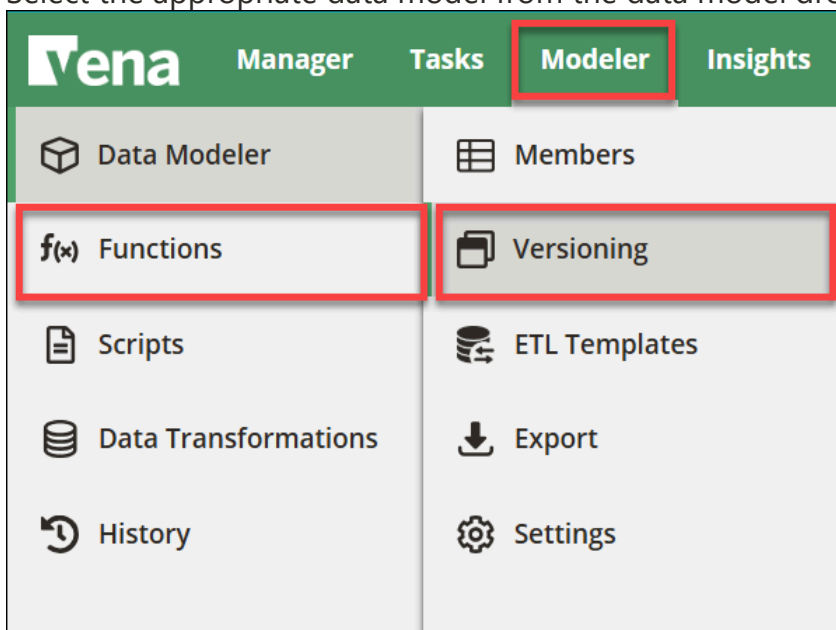
How to

Basic Versioning

Using the Versioning tool to copy a budget from one month or year to the next only takes a few steps to complete.

To copy values from one set of Intersections to another:

1. Log in to Vena and navigate to the **Modeler** tab.
2. Select **Data Modeler**.
3. Select the appropriate data model from the data model dropdown list at the top of the page.



4. Select the appropriate **data model** from the data model drop-down list at the top of the page.

The screenshot shows the Vena Modeler interface. At the top, a red box highlights the 'Data Model' dropdown menu, which is currently set to '/ Model Structure for C. 1 - Cost - Capital Assets (365C)'. To the right of the dropdown is a search bar labeled 'Search in Metadata'. Below the dropdown is a row of tabs: 'Metadata' (selected), 'Entity', 'Department', 'Measure', 'Year', 'Scenario', 'Asset ID', 'Account', and 'Period'. The main area is divided into two panels. The left panel, titled 'Member Name' and 'Alias', shows a list of fields under 'All Fields' with a filter icon. The right panel, titled 'Versioning Configuration', contains a 'Name' input field with the placeholder 'Name your configuration', a 'Filter Dimension by Members' section, 'Copy From' and 'Copy To' buttons, and a 'Copy Line Item Details' section with a dropdown menu set to 'No Line Item Details'. There are also checkboxes for 'Version Parent Members' and 'Clear all destination intersection values before copying'.

5. Input a name for your Versioning Configuration.

This is a close-up of the 'Versioning Configuration' panel. It shows the 'Name' input field with the placeholder text 'Name your configuration'.