How-To: Build and Manage Data Models in Modeler

Laura Harris
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Why use this feature?

This guide is intended to explain how to build a data model, how to maintain it, and some helpful tools and tricks.
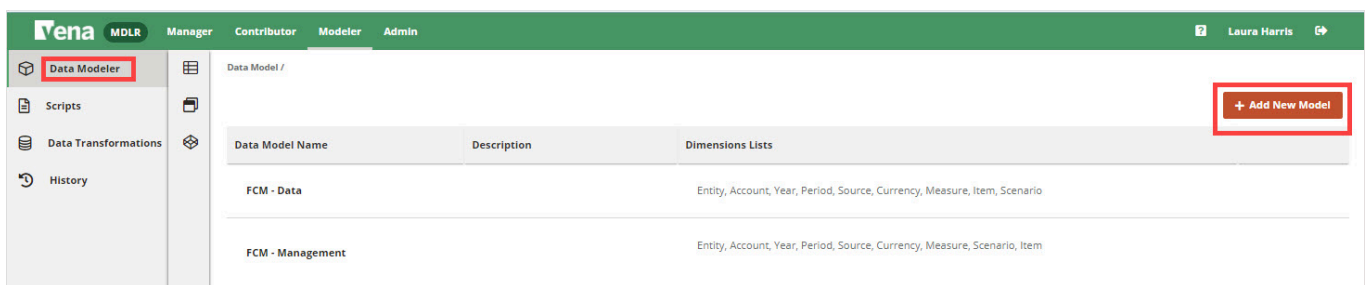
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How to

Data Model: Build your data model

Add a data model

1. Log into vena.io and select the **Modeler** tab.
2. Select **+Add New Model.**

3. Enter a *Data Model Name* and *Description,* and select **+Add**.

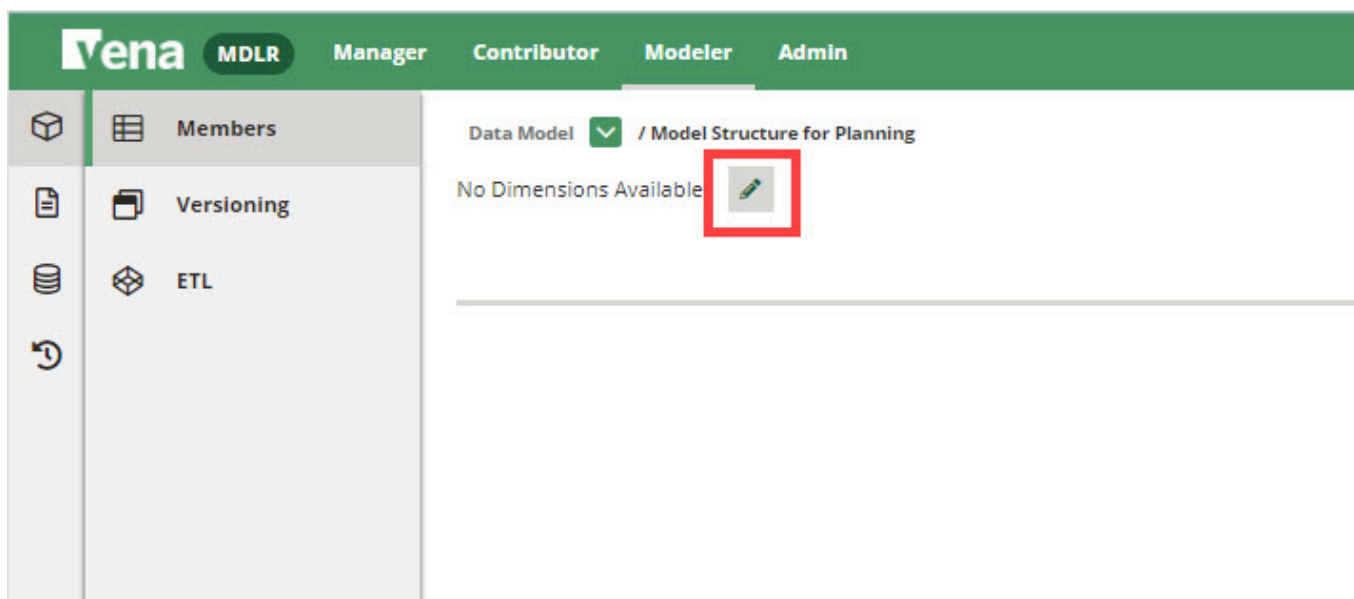4. Your new data model will appear in the list of available models:

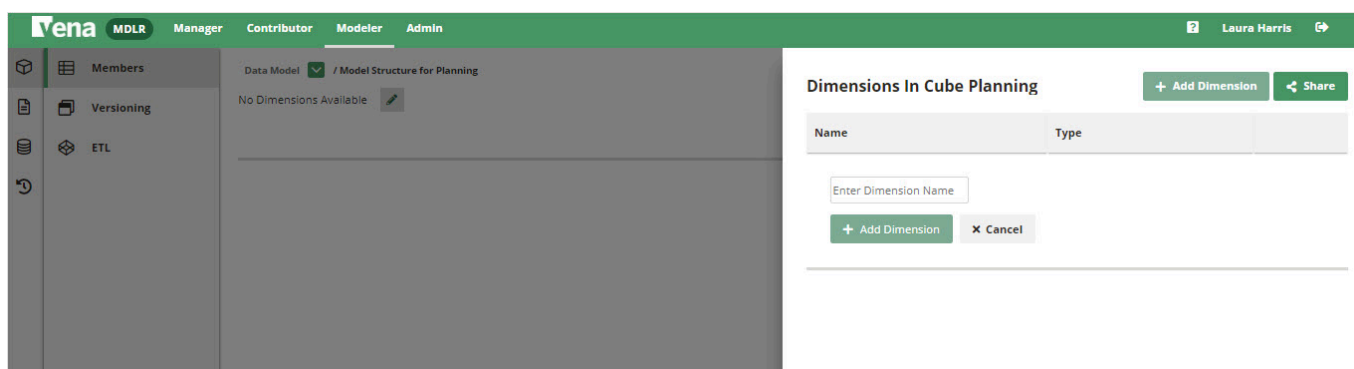## Dimensions: Structure your data model

Add dimensions

1. Select the data model you just created.

2. Select the **pencil (edit)** button beside *No Dimensions Available*. (If you're adding dimensions to an existing model, select the pencil icon at the end of the dimensions list.)

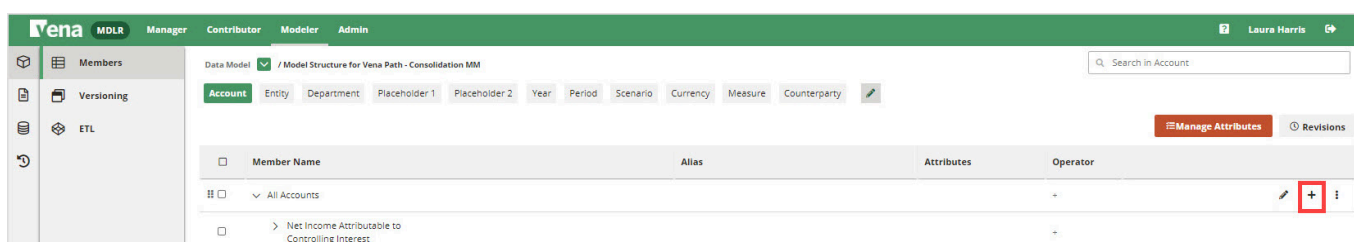3. This opens a panel with options to add dimensions or link dimensions from existing models.

4. Repeat steps 2-3 to add or link additional dimensions as needed.

Members: Populate your hierarchy

Add members

1. To add a member to your hierarchy, select the **plus (+)** icon on the member you would like to add a child under. This opens the in-line edit panel.

2. You can add a Member Name, Alias, Attribute and/or define the Operator here.

Move Members

1. To move a <u>single</u> member, select the **grab** icon to the left of the member and drag it to the intended position.

2. To move members in <u>bulk</u>, simply select the checkboxes beside the members you want to move, then use the *grab* icon to move the members to their new position.
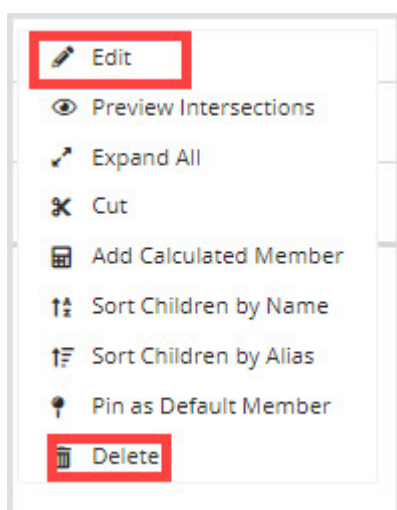
Edit or delete Members

1. To edit or delete a member, right-click or select the **vertical ellipsis** in the member row. (If you want to simply edit a member, you can also select the **pencil (edit)** icon in the member row.)

2. Select **Edit** from the window to edit a member. To delete a member, select **Delete** at the bottom of the window.

3. If you select **Edit**, the inline panel opens. You can make changes to the Member Name, Alias, Attached attributes, and operator from here.

4. After you've made your revisions, select **Update** to save the changes.

Attributes: Create alternative views

Add attributes

1. Select the **Manage Attributes** button. This opens the attributes drawer.

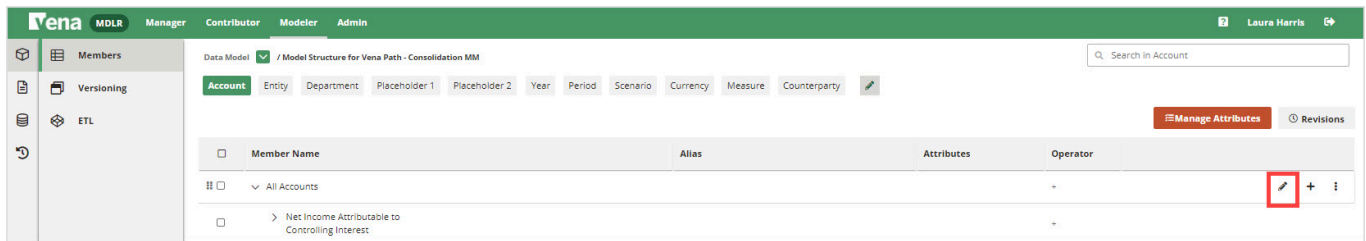2. To add an attribute, select **+ Add Attribute**.

3. Enter the attribute name and save it by selecting the **+ Add Attribute** button below the attribute field. You should see your new attribute in the sidebar.
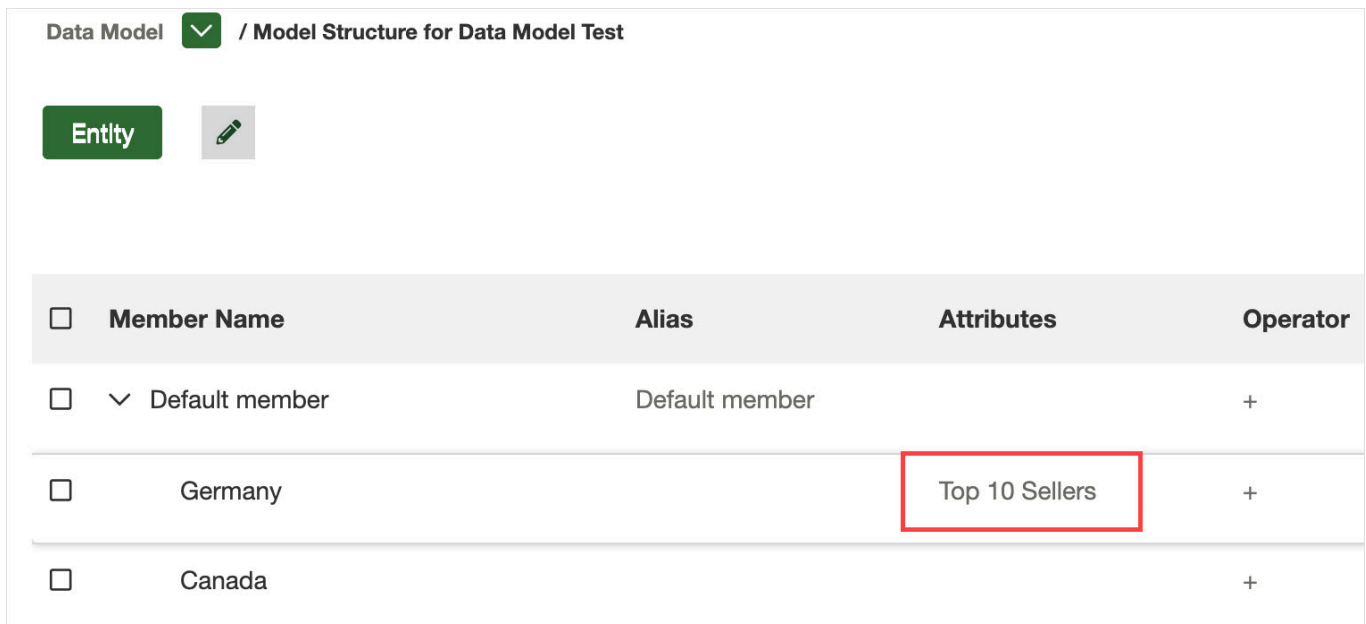
Attach members to an attribute

1. To attach members to an attribute, select the member by clicking on the **pencil (edit)** button in the member row.

2. Using the drop-down menu, select the checkbox next to the attribute(s) you want to attach to your member.
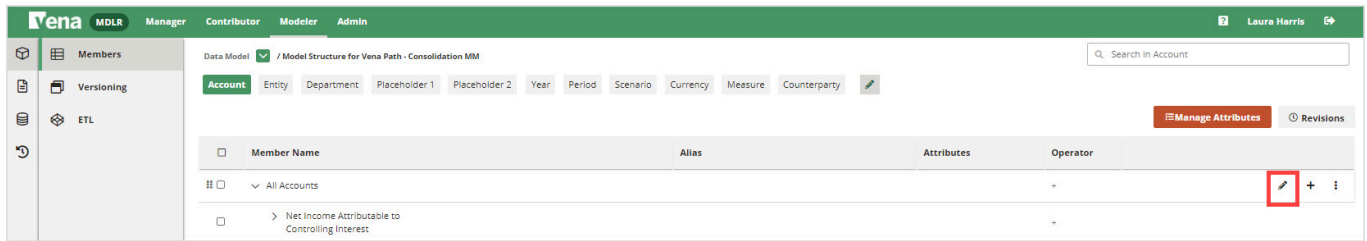

3. Select **+ Update** to save your changes. Your new attribute will appear alongside its member.
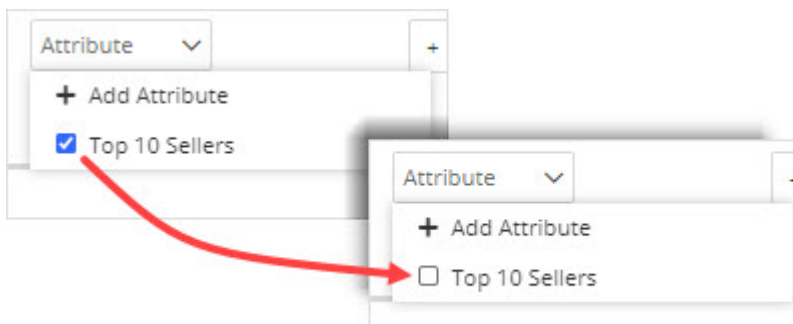

Detach members from an attribute

1. To detach members to an attribute, select the member by selecting the **pencil (edit)** button in the member row.

2. Using the drop-down menu, clear the checkbox next to the attribute(s) you want to remove from your member.
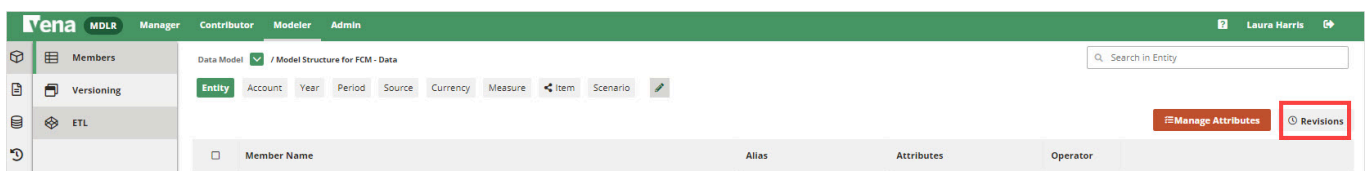

3. Select **+ Update** to save your changes.

Maintaining your data model

Revisions for audit tracking

1. To check what changes were made previously to a data model, select **Revisions** to open the revisions window.

2. Use the pagination and "go to page" to find the date of transactions you're looking for. You may copy/paste this table for your records.
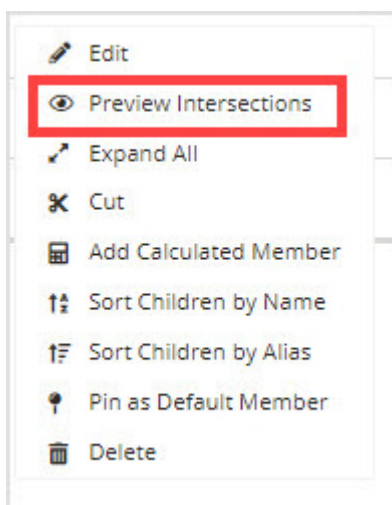
Preview intersections

1. To preview intersections, right-click anywhere on a member row or use the **vertical ellipses** to open the drop-down menu.
2. Select **Preview Intersections**.

3. This opens the *Preview Intersections* window.

4. You can use the **Export** button to download the values in the window.

Advanced member modeling

Shared members and alternate hierarchies

You may want to recall a roll-up that includes/excludes members from the main hierarchy. You can do this by sharing members to another parent and mapping the new alternative parent to the template later on. To share a member, perform the following steps:

1. Right-click anywhere on a member row or use the **vertical ellipses (3 dots)** to open the dialogue box.
2. Select the **Share Member** option.
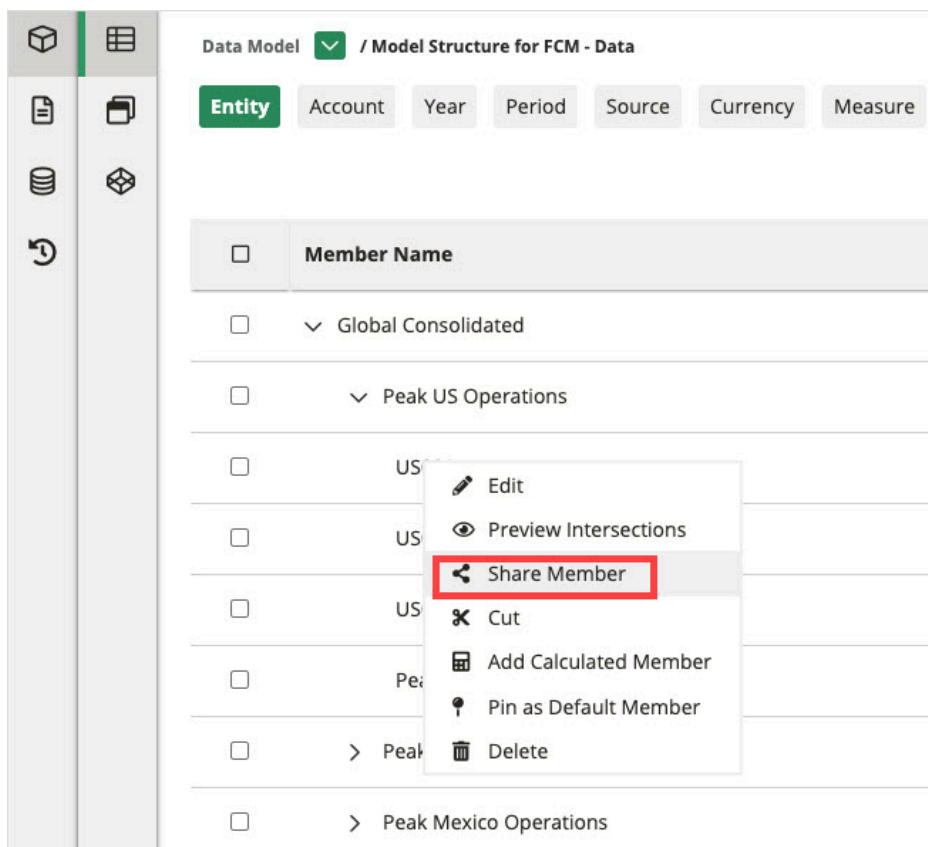
3. Select the parent member you would like to share under and select **Complete Share** to share the member.
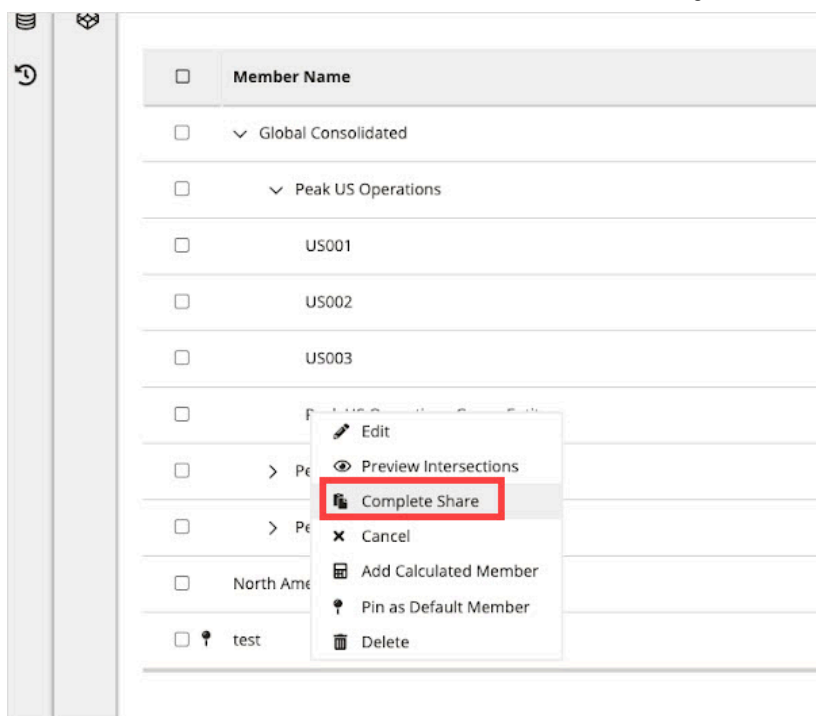
4. The member will now also appear under the parent member selected. There will be a shared icon beside the shared member name. Deleting one position will not delete the others.

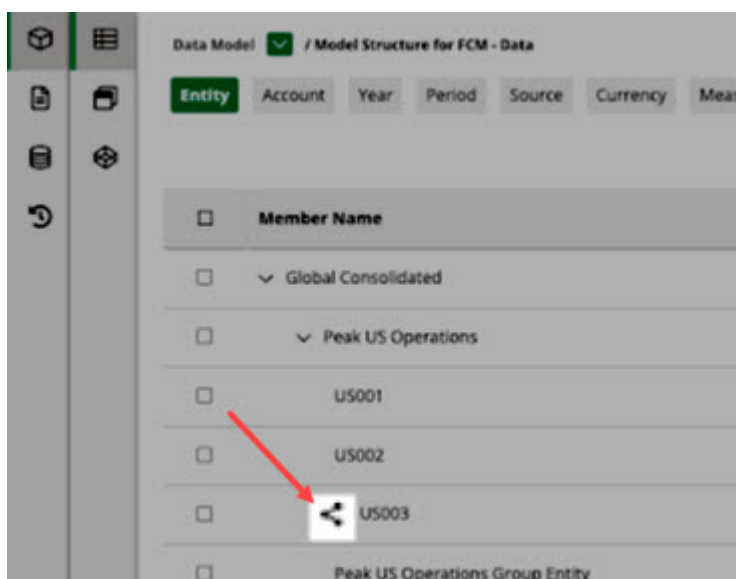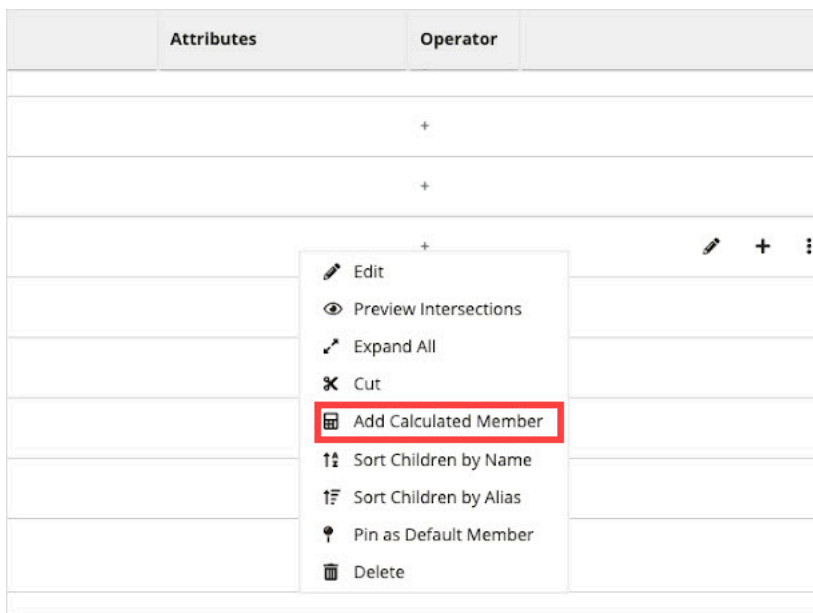Learn more about alternate hierarchies in **this article**.

Calculated members

Another way to recall a roll-up that includes/excludes a group of members or parents without cluttering the hierarchy is to use a calculated member.
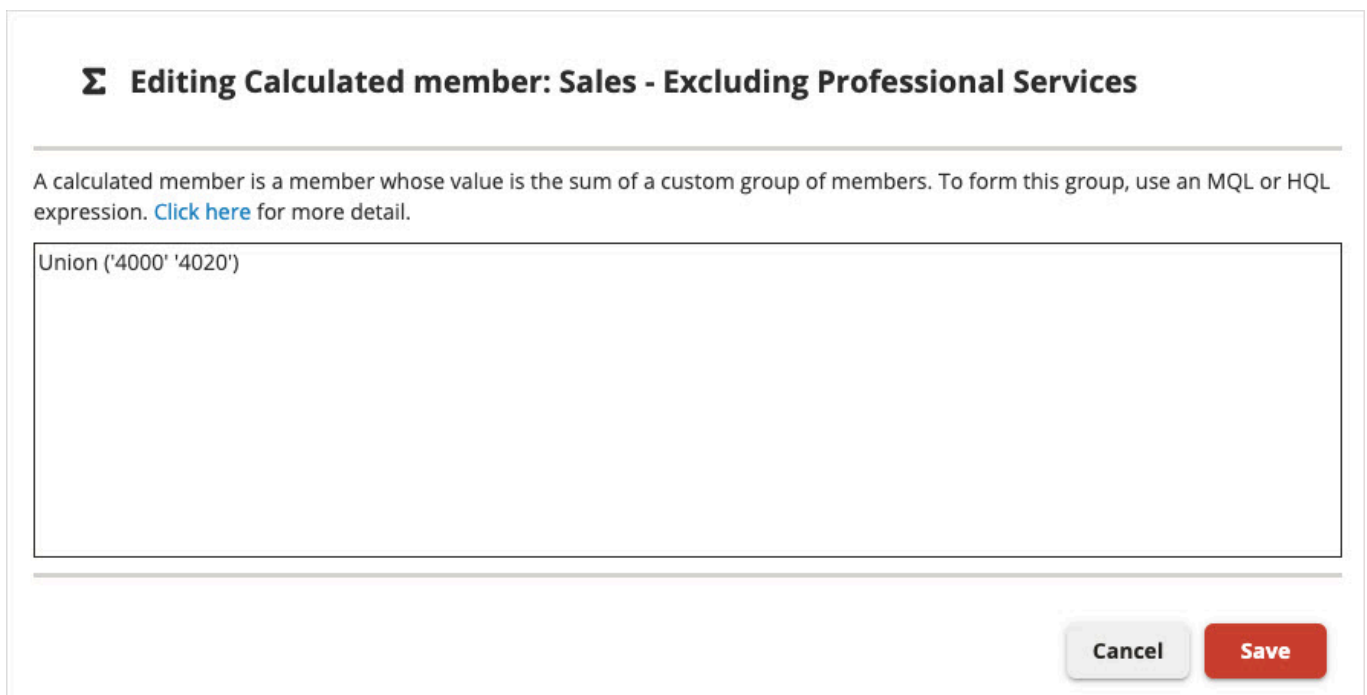
1. Right-click anywhere on a member row or use the ellipsis and select **Add Calculated Member** from the drop-down menu.

2. In the in-line panel, name the calculated member and select **Edit Expression** to add MQL expressions.

3. In this example, we want to add accounts 4000 (Product Sales) and 4020 (Subscription Sales). Once you're finished, select **Save** to save your expression.

4. Back in the in-line editor, select **+ Add Member** to save the calculated member.

5. To edit the expression of a calculated member, right-click and select **Open Expression Editor** from the menu.