

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



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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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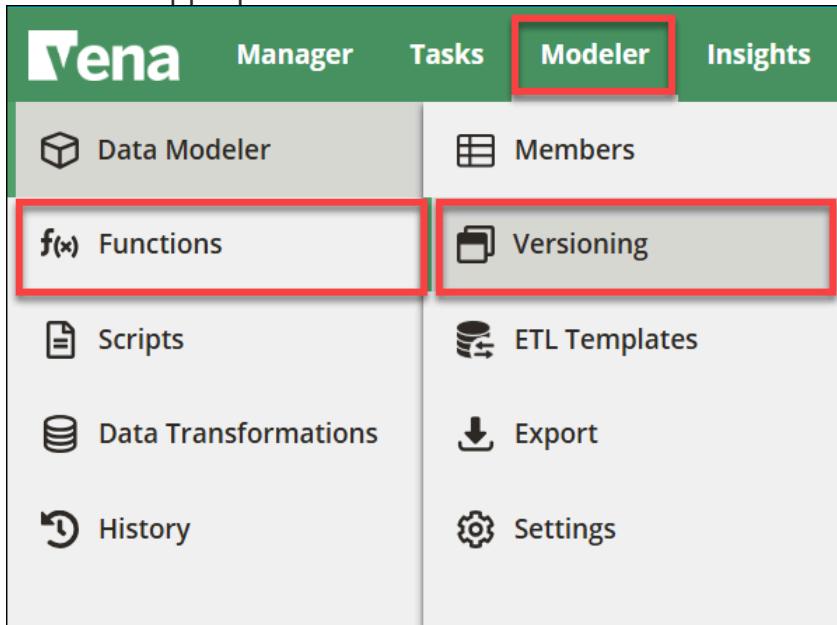
### How to

#### 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 'Model Structure for C.1 - Cost - Capital Assets (365C)' interface. At the top left, there is a 'Data Model' dropdown menu with a red border around it. To its right is a search bar labeled 'Search in Metadata'. Below the search bar are several filter buttons: 'Metadata' (green), 'Entity', 'Department', 'Measure', 'Year', 'Scenario', 'Asset ID', 'Account', and 'Period'. On the left side of the interface, there is a sidebar with sections for 'Member Name' and 'Alias', and buttons for 'All Fields' and 'Not Metadata Specific'. On the right side, there is a 'Versioning Configuration' panel. This panel includes a dropdown menu for 'Saved Configurations' with 'Saved Configurations' selected. It also has fields for 'Name' (labeled 'Name your configuration') and 'Filter Dimension by Members'. Below these are 'Copy From' and 'Copy To' buttons. Underneath these buttons is 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.

The screenshot shows a 'Versioning Configuration' dialog box. It has a title bar 'Versioning Configuration' and a 'Name' field containing the placeholder text 'Name your configuration'.