

How-To: Bulk Updating Dimension or Hierarchy Member Names



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You may have a business change or requirement that requires **bulk updates of dimension or hierarchy member names.**

Why use this feature?

Some business changes or updates may require you to update your current dimension member names to a different format. This feature allows you to make these updates in bulk instead of updating them one by one.

Before you begin

To follow the instructions in this article, you will need at least **Modeler** access.

How to

1. Navigate to the **Modeler** tab.
2. Select **Data Modeler** in the sidebar.
3. Select **Export** from the sidebar tab.
4. Under *Choose what you would like to export;* select **Hierarchy**.
5. Under *Export if following condition is true,* you can use an **MQL** or **HQL** query to specify only the part of the hierarchy you are interested in. If this is blank, then the entire hierarchy will be exported.

The screenshot shows the Vena Modeler interface. On the left sidebar, under the 'Data Modeler' section, the 'Export' button is highlighted with a red box. In the main content area, a red box highlights the 'Choose what you would like to export:' dropdown set to 'Hierarchy'. Below it is a section for 'Export if following condition is true: (optional)' containing several dimension filters.

6. Select **Advanced Options** to refine your export.
7. Under *Where would you like to export to?*, select **File**.
8. Under *File format*, select **CSV**.
9. Check the boxes next to *Include column headers in export?* and *Include member IDs in export?*.
10. **Save** the Advanced Options.

Advanced Options

Export to:

File Staging Table

File format	File encoding
CSV	Unicode (UTF-8)

Include column headers in export

Include member IDs in export

Cancel ✓ Save

11. Open the file in Excel or Notepad.
If opening with Excel, it's important to note that it will try to rename the member IDs. However, member IDs must stay the same. Because of this, follow these steps to ensure the member IDs remain the same in Excel ([see this article for more details on maintaining dimension member IDs](#)):
1. Open the exported CSV file in Notepad or Notepad++.
 2. Open a blank Excel window and highlight the 7th column which is the _member_id column.
 3. Right-click the highlighted column and select **Format cells**.

4. Change the format to Text. This ensures that Excel does not try to change the format or values when we paste the exported hierarchy file.
 5. Return to the Notepad file and copy the contents.
 6. Then return to the blank Excel file and select cell A1 and paste. If Excel places all of the data in just column A, use the Text to Column feature from the Data tab in Excel.
 7. Select **Delimited**, and then select **Next**.
 8. Check the box next to the Comma, and then select **Next**.
 9. Select all the columns or just the 7th column (_member_id) and select **text** as the column data format.
 10. Select **Finish**.
12. Make the desired changes and save the file. Save as CSV if you used a blank Excel file and re-import the CSV file with a hierarchy load. You can use an existing load hierarchy ETL job or create one if it doesn't exist.
 13. To import:
 1. Navigate to the **Modeler** tab.
 2. Select **Data Modeler** from the sidebar.
 3. Select **ETL Templates** from the sidebar tab.
 4. Select an existing Load Hierarchy job and select the play button.
 5. If a Load Hierarchy job doesn't exist, create one:
 1. Select **+ Create Template**
 2. Enter "Load Hierarchy" as the name.
 3. Select **Add Step**.
 4. Select **File to Cube**.
 5. Select **Hierarchy** in the Data Type drop-down
 6. Select **Add**.

7. Select **Save** and then select the **Play** button.

New Template

Add Step ▾

Template Name
Load Hierarchy

Job Schedule OFF

Job Notifications OFF

Step	Step Type	Channel / Table	Data Type	Clear Slice
1	File To Cube		hierarchy	

Cancel ✓ Save

6. The ETL Template Execution window opens. Drag and drop the CSV file or select **browse files** and select the **CSV file** from your computer.

7. Select Run.

Run Load Hierarchy Template

Step	Step Type	Channel / Table	Data Type	Inputs
1	File To Cube	Hierarchy		Required

Drag and drop your file here or [browse files](#)

File format: CSV File encoding: Unicode (UTF-8) Acceptable invalid lines: 0

Close **Run**

8. During the import, the system checks for the Member ID and if it exists, the new name will be used instead of creating a new member.
9. Once completed, check your hierarchy and confirm everything looks good.

Note

This will also automatically update your templates with the updated member names since the system references the names using the unique member IDs.