DIMENSIONS

Microsoft Dynamics NAV

DIMENSIONS

Dimensions in Microsoft Dynamics™ NAV help you to better understand where your business is going.

Key Benefits:

- Explore how your business operates on various levels.
- Grow and change your tools along with your business.
- Base important decisions on information you can trust.

"The entire dimensions concept is especially useful at our headquarters, giving us the ability to control certain dimensions centrally, while leaving others at the discretion of our local offices."

"Dimensions enable an easy shift to new and unforeseen business models, meaning we can grow in all kinds of new directions."

All quotes are attributed to Svend Thomsen,
CFO Oticon A/S, www.oticon.com

Better Ways of Doing Business
The intricate set of relationships that make your business a success is often difficult to fathom. What factors make a particular product successful? Where are you failing to deliver? How do actual costs compare with allocated budgets?

The Dimensions feature in Microsoft Dynamics NAV, formerly Microsoft® Business Solutions–Navision®, helps you answer questions about your business. By combining the analysis of different dimensions, you can get a better understanding of how well your business is operating, where it's going and where it needs help.

Dimensions allow you to attribute characteristics to the information you record and use in your daily work, giving you the power to ask searching questions about your business and act upon the answers. You can seek more effective ways of doing business, develop your analytical tools in an easy way, and base important decisions on reliable information.

You can also use dimensions to allocate responsibility. By using dimensions on posted entries and budget entries, you have the ability to monitor how individual units (for example, a responsible department or region) are performing and to compare performance with other units (such as previous periods and budgeted amounts).

Room to Grow and Change
Dimensions grow and change with your business needs. When an opportunity presents itself, accountants and IT personnel don't need to spend time changing accounting structures to fit new business processes. They can easily create or change existing dimensions.

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The possibilities for creating new dimensions and changing existing ones are endless. It's easy to add new dimensions on the fly, and there's no limit to the number of dimensions, or the number of values, that can belong to each dimension. You can change existing dimensions to reflect your business processes because:

- You can name them in a way that reflects your company's reporting practices and the requirements of your employees.
- When you no longer require a particular dimension, you can simply block it from use.
- You can structure values in a hierarchy that mirrors your existing reporting structures.
- You can change dimensions (or add new ones) as often as you like—without changing your accounting structure.

Information You Can Trust
You increase the consistency of data by setting up rules for dimensions. You determine how dimensions are combined in order to make sure that they reflect company policy. For example, you might want to ensure that the decision-making process reflects company policy by excluding some salespeople from using certain customer-segment dimension values.

You can also support the way your business operates by defining default dimensions. For each default, you can also define posting rules that determine the way dimensions information may be posted. For example, you can define that a dimension value must always be used for a particular account or account type. Defaults also ensure quicker data entry with fewer errors.

For more information about Dimensions in Microsoft Dynamics NAV, visit:
www.microsoft.com/dynamics/nav

DATA SUMMARY SHEET

Key Features	Description
Flexible Dimensions	▪ Define an unlimited number of dimensions and dimension values at any time. ▪ Name dimensions as you please, so that your dimensions setup reflects the specific needs of your company at all times. Add new dimensions without disrupting your accounts structure in any way because: ▪ You set up dimensions and dimension values in their own tables. ▪ Their underlying values are independent of your chart of accounts.
Dimension Hierarchies	Set up dimension value hierarchies to reflect your reporting and accounting needs because: ▪ The intuitive hierarchy setup closely resembles the setup procedure for your chart of accounts. ▪ You can include totaling values and formulas that allow an unlimited category tree. ▪ You can filter data to obtain the level of dimensions information you require. ▪ Maintain dimension value hierarchies independently of your chart of accounts. You can maintain a highly detailed reporting and accounting hierarchy without having to create and manage a cumbersome range of accounts and sub accounts.
Dimension Rules	Define dimension rules in the level of detail you want and alter the setup at any time. The following dimension rules can be applied: ▪ Defaults – apply default dimensions to specific accounts, groups of accounts, or entire account types (for example, all customer accounts). You can set up defaults as either suggested or mandatory. ▪ Combinations – define how dimensions and dimension values may or may not be combined in journals and documents. You can define combinations at the dimension or dimension value level. For example, some salespeople may be excluded from using certain customer-segment dimension values. This helps ensure that policy decisions made in your company are also reflected in your accounts. ▪ Prioritization– define prioritization of account types when an account and a balancing account suggest conflicting default dimension values for the same dimension. ▪ Blocking – block and unblock dimensions and dimension values from use depending on whether the dimension or value is still required (with regard to seasonal variations, campaigns, and so on).
Dimension Input	Define up to eight shortcut dimensions for use throughout the application: ▪ Shortcut dimensions are dimension fields that can be shown or hidden on journal and document lines to make the input of dimensions data as straightforward as possible. ▪ Shortcut dimensions can easily be switched or replaced to include new dimensions and accommodate new needs. ▪ Enter all other dimensions data in a separate Dimensions window using a conveniently located button on all journals and documents. ▪ Use defaults to reduce manual data entry and ensure that the desired dimensions data is always posted.

Key Features	Description
Dimensions on all G/L Entries	▪ Define two global dimensions for use throughout the program. ▪ Use these global dimensions to view and filter all G/L entries in the General Ledger Entries window. ▪ For non-global dimensions, you can filter G/L entries using the analysis view.
Analysis Views	▪ Use Analysis Views to investigate relationships and monitor performance. You can define and name as many analysis views as you wish. Gather and view posted G/L entries for immediate analysis by attributing characteristics to the information you record in your daily work. You can, for example, attribute: ▪ Attached dimensions. ▪ A start date. ▪ An account number. ▪ Make general analysis much easier to understand by compressing analysis view entries so you see only totals (based on a vast number of G/L entries). ▪ Sort and gather all G/L entries with at least one of up to four dimensions specified for each analysis view. For example, you might create an analysis view that gathers all G/L entries for departments operating in specific geographic areas, excluding those entries relating to a particular sales campaign. ▪ Update the G/L entries included in an analysis view manually to gather new G/L entries posted since the last update, retain saved versions of an analysis view without new updates, or have the program update an analysis view each time a G/L entry with the specified attributes is posted. Present the contents of an analysis view in a matrix form in the Analysis by Dimensions window: ▪ Filter financial data by dimension, date, and G/L account. ▪ Modify the matrix axes. ▪ Compare dimensions data from G/L entries with data from Budget entries to show variance, variance percentage, and index percentage. ▪ Uncover the factors involved in creating particular results or relationships. You can drill down from analysis view entry totals to each individual analysis view entry, and then further still to the specific G/L entries that comprise a particular analysis view entry. ▪ Optimize your analyses by exporting the information in your Analysis Views to Microsoft Excel. Here you can make the most of Excel's facilities for data presentation and manipulation.
Budget by Dimensions	▪ Attach an infinite number of dimensions to each budget entry. Filter your budget by up to four dimensions in order to: ▪ Create very specific 'sub budgets' (within an overall budget), such as a sales budget for a particular customer target group per department over a specified period.

Key Features	Description
	▪ Compare G/L entries and budget entries by dimensions using the Analysis by Dimensions window. ▪ Copy a budget including dimensions from a previous period for use in a new period while using an adjustment factor. ▪ Easily export and import dimensions on budgets to and from Excel. ▪ Create various Excel budgets at a number of subunits (for example, departments) and then import them back into Microsoft Dynamics NAV to create a single aggregate budget with all dimensions information attached.
Reporting by Dimension	▪ Include global dimensions on all reports where dimensions information may be relevant and available. Use dimensions to create specific reports: ▪ The Dimensions – Totals report. This report shows G/L entry totals organized by G/L account, dimension values, and selected dimensions. For example, you can view department totals per product, per sales region. ▪ The Dimensions – Details report. This report shows each individual posting segmented by G/L account, dimension value, and dimension for specific accounting or auditing purposes. You can also compare actual amounts with budgeted amounts in a single report. ▪ Your own company-specific dimension reports. You use analysis view entries (instead of G/L entries) in account schedules to create these reports, and you can easily export to Excel to create visual presentations.

System Requirements

| To obtain all of the features mentioned in this fact sheet, the following modules and technologies are required: | Basic Dimensions includes:
▪ Two global dimensions
▪ Default dimensions and rules per account, account group, and account type

Advanced Dimensions includes:
▪ Unlimited dimensions
▪ Shortcut dimensions
▪ Prioritization
▪ Dimension combinations
▪ Analysis views
▪ Analysis view entries in Account Schedules
▪ Export of Analysis Views to Microsoft® Excel |

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