



# TQH Dimension Hierarchy

for Dynamics 365 Business Central



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#### Summary

The Dimension Hierarchy app extends existing standard dimensions functionality and creates links between dimensions which serves two main purposes:

- It allows to create tree hierarchy between various dimensions
- It auto-populates specific dimension values based on the dimensions structure set up starting from the top-level dimension value selected

Companies who have a fixed structure rules between financial dimensions used in their business will benefit from this solution by significantly reducing the time required during journals and orders creation.



#### Dimensions hierarchy set up

To start using the Dimension Hierarchy following steps must be performed:

- 1) TQH Dimension Hierarchy extension is loaded into Dynamics 365 Business Central
- 2) TQH DIM HIERARCHY Permission Set is assigned to a user(s)

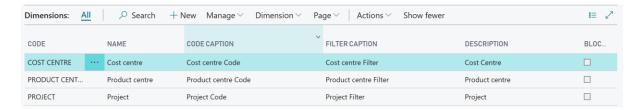
			-
TQH DIM HIERARCHY	TQH Dimension Hierarchy	TQH Dimension Hierarchy v.6	Tenant

- 3) Dimension Values created
- 4) Linked Dimension setup added

#### Description and samples

Company has following 3 dimensions:

- Project
- Cost Centre
- Product Centre



#### **PROJECT** dimension has following dimension subset of values created:

EDIT - DIMENSION VALUES - PROJECT · PROJECT · New

CODE		NAME
00000		Balance Sheet
40425		Corp Strategy
40448		Sales FAE EMEA
50001		PC_CEL
50002	• • •	PC_POS_OTHER
50003	• • •	PC_SharedServices_Other
50004	• • •	PC_IPR_Other
50005		PC_SHO
51030		MA
51031		MA_ADM
51032		MA_APL
51033	• • •	MA_MOD
51034		MA_VAL
51035		MA_SD1
51036	• • •	MA_CSD
51037		MA_PHY
51038	• • •	MA_SYS
51039	• • •	MA_BRD
51040		MA_CIP



# **COST CENTRE**:

EDIT - DIMENSION VALUES - COST CENTRE · COST CENTRE + New

CODE		NAME
00000		Balance Sheet
40425	• • •	Corp Strategy
40448	• • •	Sales FAE EMEA
50001	• • •	PC_CEL
50002	• • •	PC_POS_OTHER
50003	• • •	PC_SharedServices_Other
50004	• • •	PC_IPR_Other
50005	• • •	PC_SHO
60000	• • •	Admin
60100	• • • •	Legal
60200	• • • •	HR
60300	• • •	IT

# PRODUCT CENTRE:

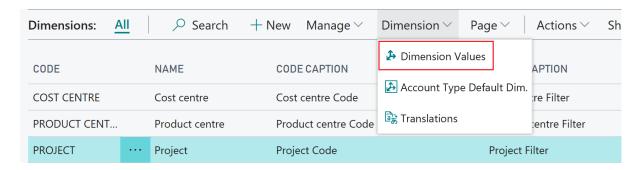
EDIT - DIMENSION VALUES - PRODUCT CENTRE  $\cdot$  PRODUCT CENTRE + New

CODE		NAME
000		Balance Sheet
400	• • •	Sales
501	• • •	Cellular
502	• • •	Positioning
503	• • •	ICD
504	• • •	IPR
505	• • •	Short Range
600	• • •	Admin



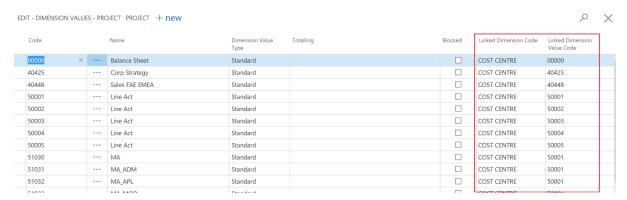
New setup allows to add linking dimension and code so that Project Code 40425, for example, has linked Cost Centre 40425, and Cost Centre 40425 in its turn has linked Product Centre 400 underneath. Same way Project Code 50030 has linked Cost Centre 50001 which in its turn has Product Centre 500.

To set up required links navigate to Dimensions page, select required dimension and click Dimension menu > Dimension Values.



Select dimension value and set relation to other dimension code by populating Linked Dimension Code (one of PROJECT, COST CENTRE OR PRODUCT CENTRE). We select COST CENTRE as per business rule and then select Linked Dimension Value Code from one of the existing COST CENTRE dimension values.

The whole setup will appear as shown below:



This builds up Dimensions Hierarchy like:

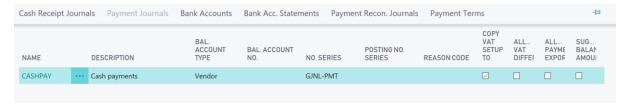
Project	Cost	Product		
Centre	Centre	Centre		
40425	40425	400		
50002	50002			
50001		500		
51030	50001			
51031				



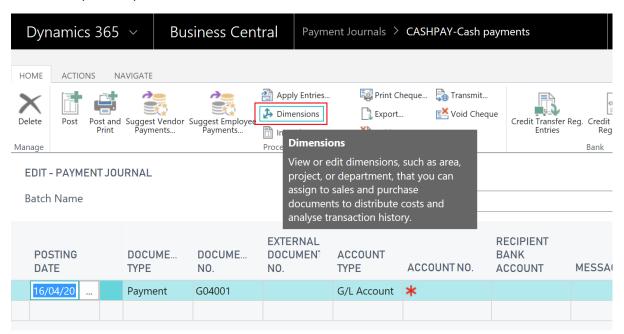
#### Dimension hierarchy usage scenarios

When entering dimensions on journals, orders or other documents, selecting Project Centre and its value will auto-populate all linked dimensions from hierarchy set above. For example, selecting Project Centre 40425 will automatically add and set Cost Centre 40425 and Product Centre 400.

Go to Cash management menu, open Payment journals. Click journal name to create new journal (CASHPAY).

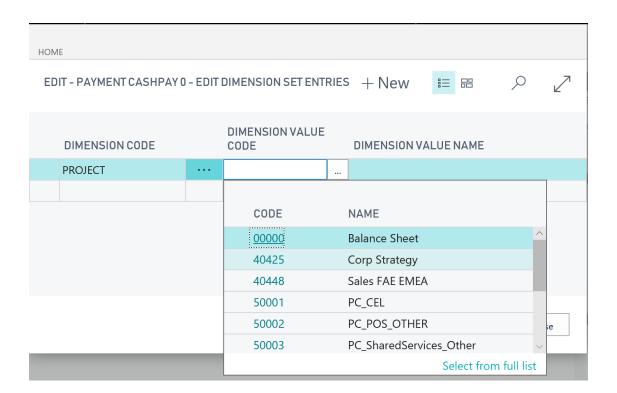


From the top action pane, select HOME > Dimensions:

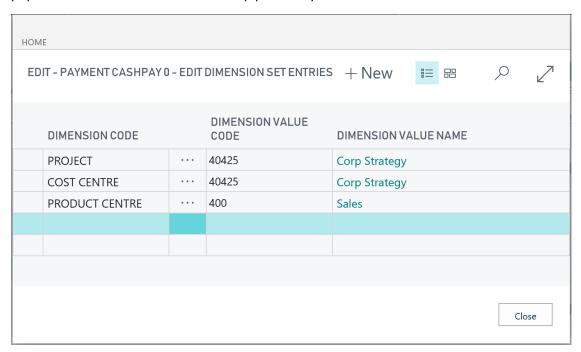




On the Edit Dimension Set Entries page opened, populate top level/parent dimension code and select value (40425, for example):



Press the TAB key to allow selected value to be saved and processed which will automatically populate other linked dimensions set up previously.



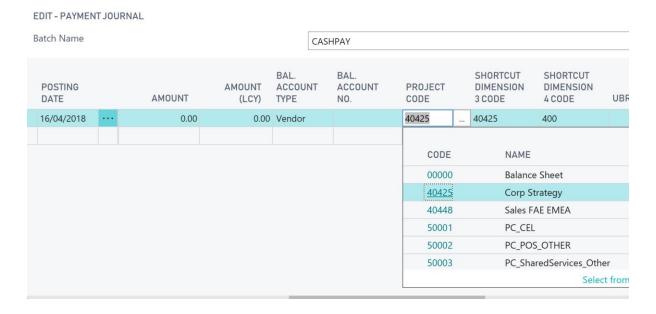


#### All dimensions are now added to journal:



Dimensions can be changed following same pattern – changing PROJECT CODE value will automatically change linked COST CENTRE AND PRODUCT CENTRE dimension values.

#### Changing PROJECT CODE from 40425 to 50001:



will result in all three dimensions to have new values in one click instead of changing all one by one.



#### EDIT - PAYMENT JOURNAL

-	Batch Name				CA	CASHPAY				
	POSTING DATE AMOUNT			AMOUNT (LCY)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	PROJECT CODE	SHORTCUT DIMENSION 3 CODE	SHORTCUT DIMENSION 4 CODE	
	16/04/2018		0.00	0.00	Vendor		50001	50001	501	

The Dimension Structure app is applicable for situations when there is 1:1 relation between dimensions, i.e. parent dimension drives and defaults all the remaining set of linked dimensions. The functionality also restricts users from changing values of populated linked dimensions (COST CENTRE and PRODUCT CENTRE) with an error message displayed.

### Support and Availability

# **Supported Editions**

This app supports the Essentials and Premium Editions of Dynamics 365 Business Central

# **Supported Countries**

United Kingdom and United States