Creating Dimension Groups and Dimension Structures

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Create Opportunities

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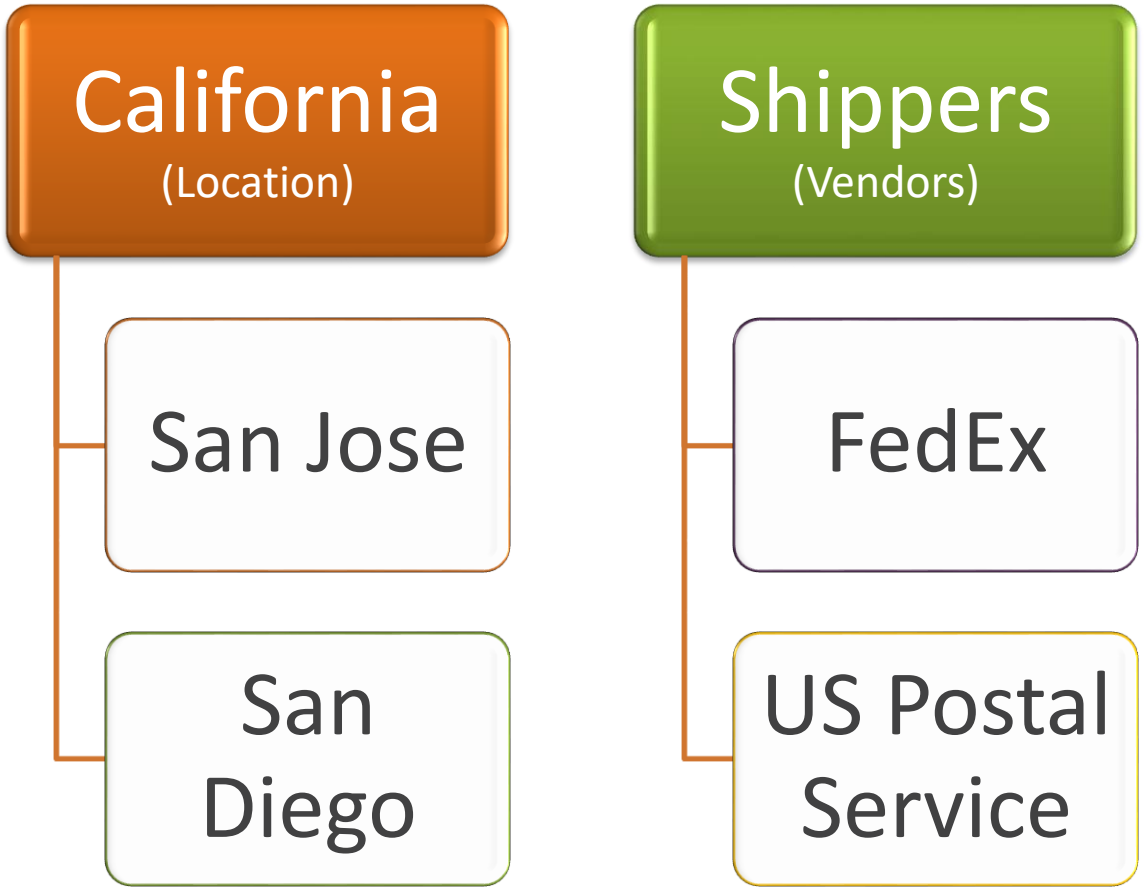
Dimension Group

- A group of members in a dimension, such as customer, vendor, item, employee, department, location/entity, and class.



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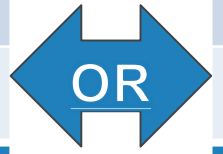
Dimension Structure

- Dimension structures are structures that represent dimensional data that you intend to use on the rows or columns of financial reports.

California	Revenue
San Jose	7,000
San Diego	5,000
Total California	**12,000**



Revenue	San Jose	San Diego	California
Services	4,000	3,000	**7,000**
Subscriptions	3,000	2,000	**5,000**
Total	**7,000**	**5,000**	**12,000**

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Dimension Group

Creating and Using a Dimension Group

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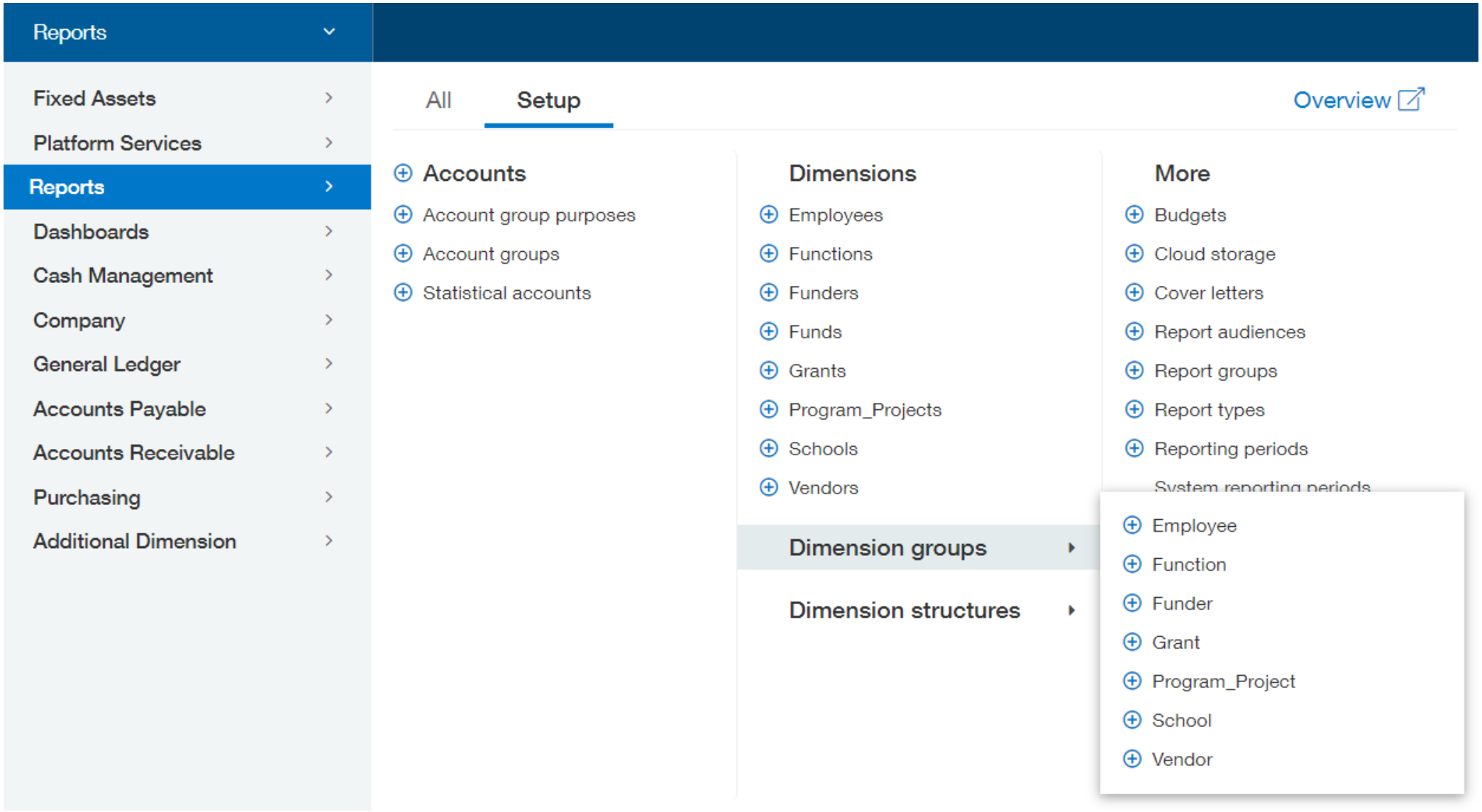
Where are dimension Groups Located?



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Adding a Dimension Group

1. Display the **Dimension Group** list, and click Add to add a new group.
2. Enter an ID and Name for the **Dimension Group**.
3. Enter any description that will remind you of what this group includes or how it's used.
4. Select the type of Group

Be sure to make the Dimension Group ID Unique, as it will be used in other areas of Intacct.

A well written Description will help you remember how the Group is used.

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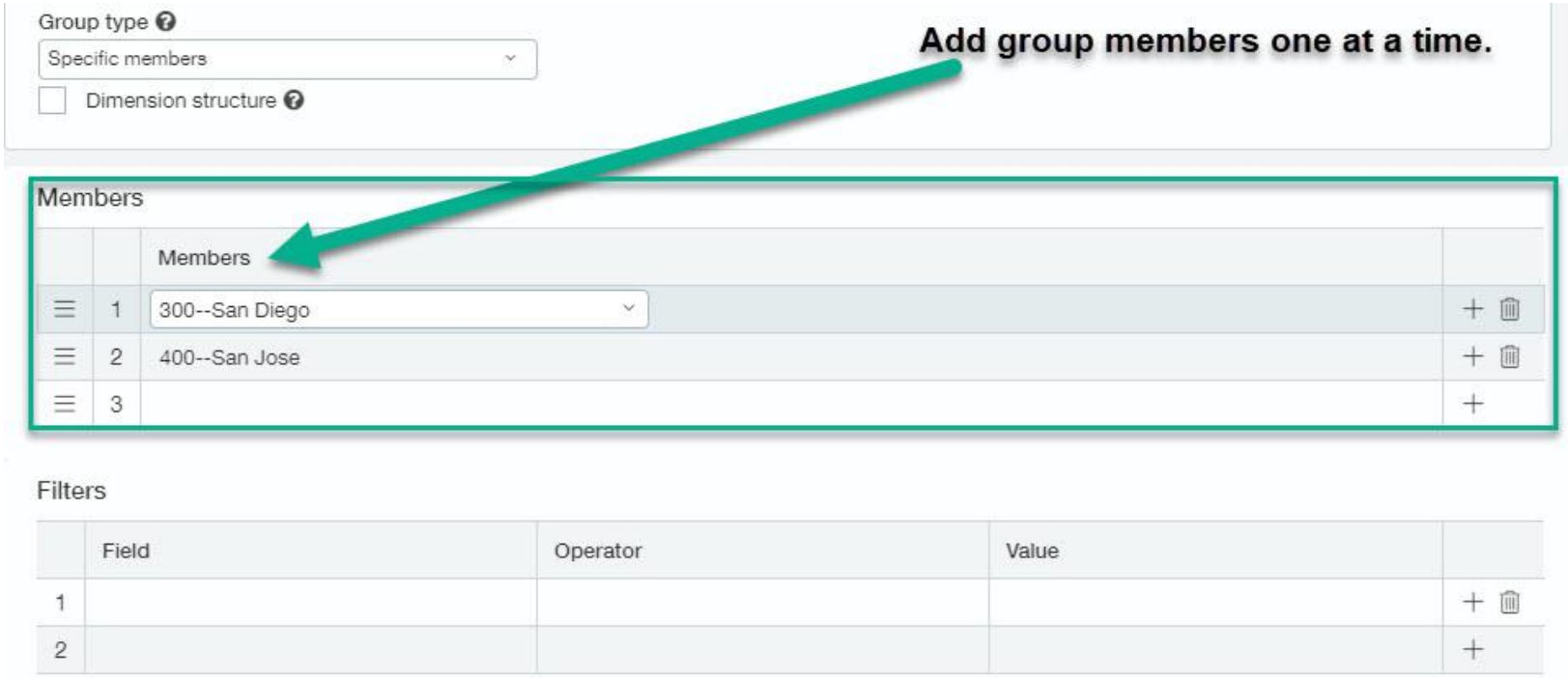
Select the type of group

- **Specific members**
  - Select the specific members of the Dimension Group.



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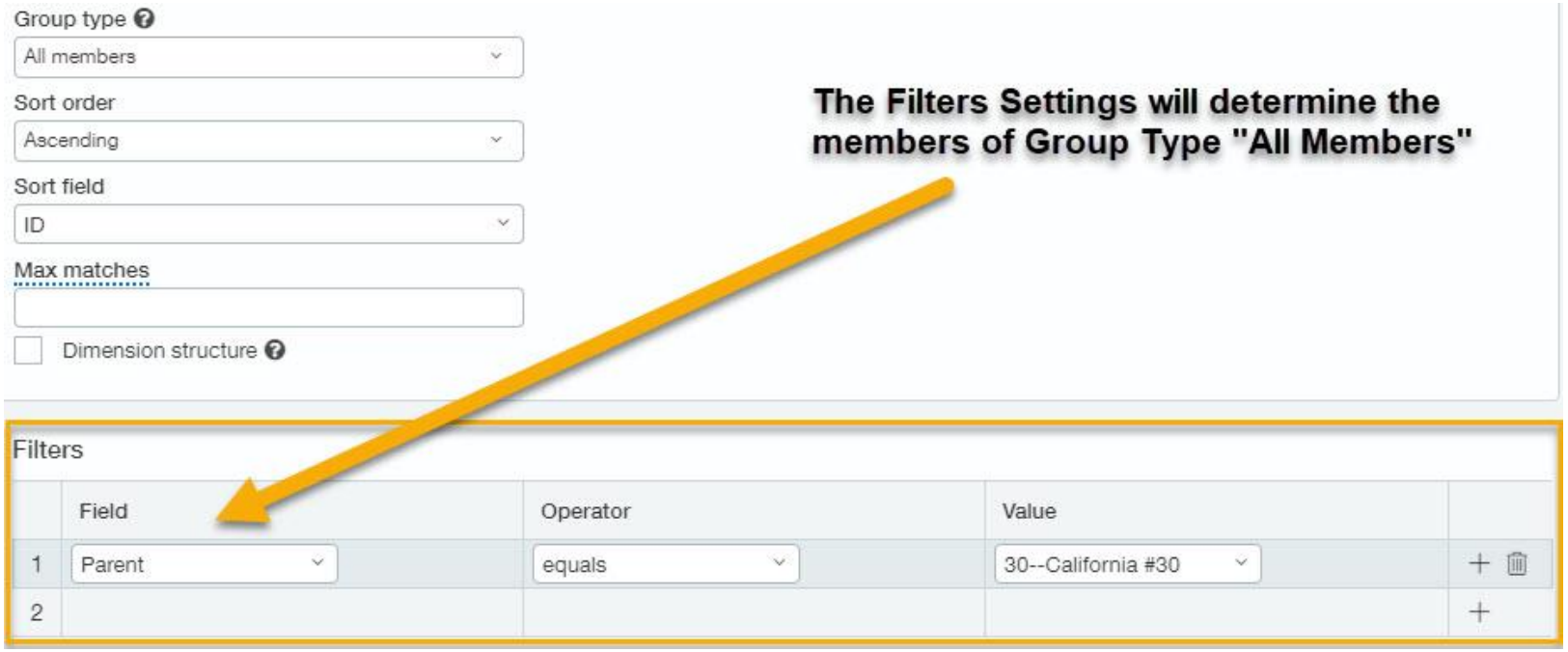
Select the type of group

- All members
  - Filter for members based on criteria of your choice
  - Choose the Sort order and what field to sort by



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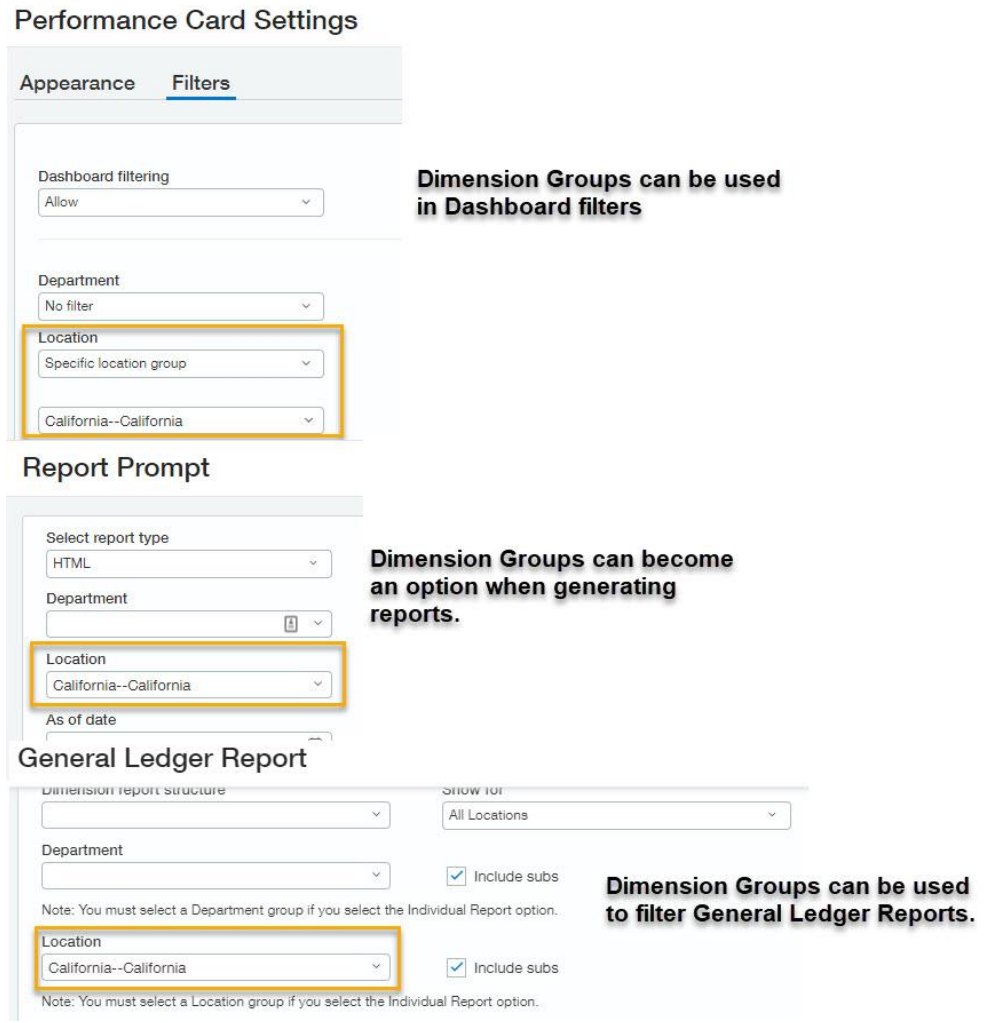
Adding a Dimension Group

5. Select the *Dimension Structure* option to automatically create a *Dimension Structure* when the **Dimension Group** is created.
6. Save the newly created **Dimension Group**.



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Creating a Dimension Group in Intacct

Demonstration

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Dimension Structure

Creating and Using a Dimension Structure

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Creating a Dimension Structure

- **Dimension Structures** are created from *Dimension Groups*.
- A **Dimension Structure** can automatically be created from a *Dimension Group*.
- **Dimension Structures** Contain one or more *Dimension Groups*.
- Used in the Rows and Columns of Financial Reports.

Dimension Structures used in Financial Reporting.

Dimension Structures consists of one or more Account Groups

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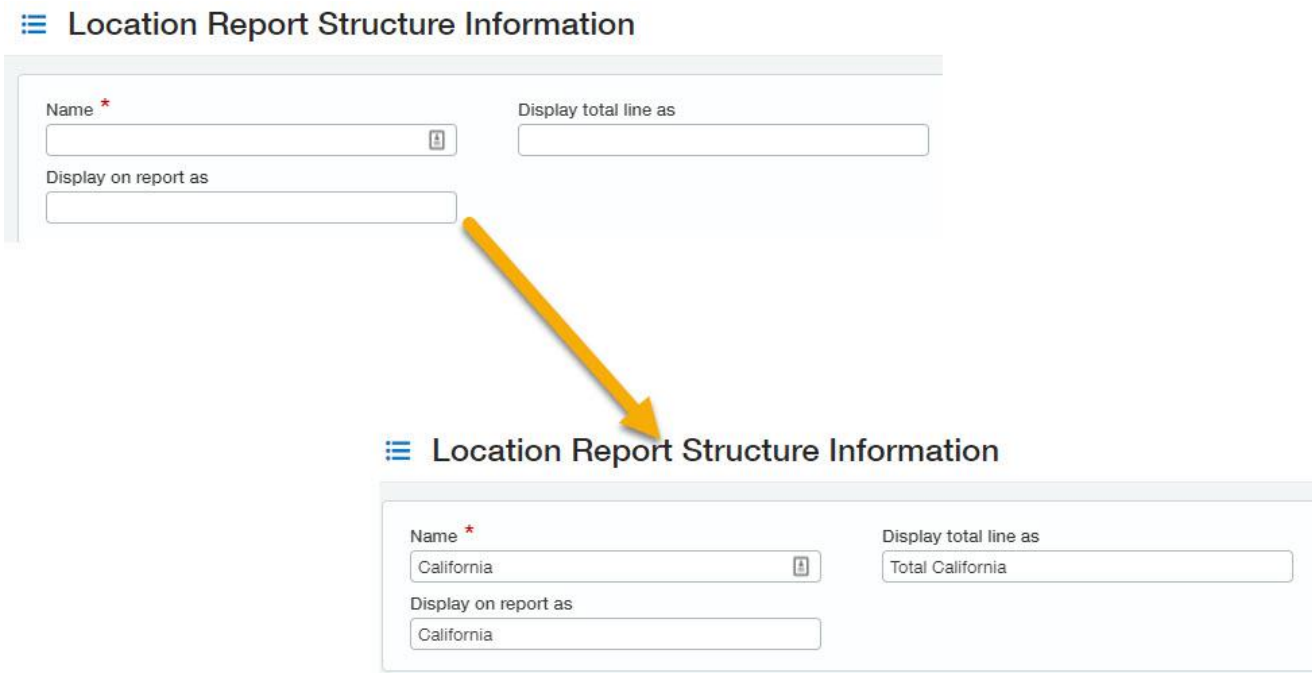
Adding a Dimension Structure

1. Display the **Dimension Structure** list, and click Add to add a new Structure.
2. Enter a Name for the **Dimension Structure**.
3. Determine how you want the **Dimension Structure** to Display on Reports.
4. Select the Structure Type



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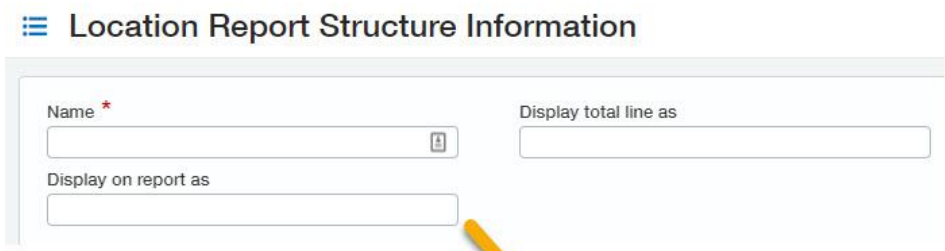

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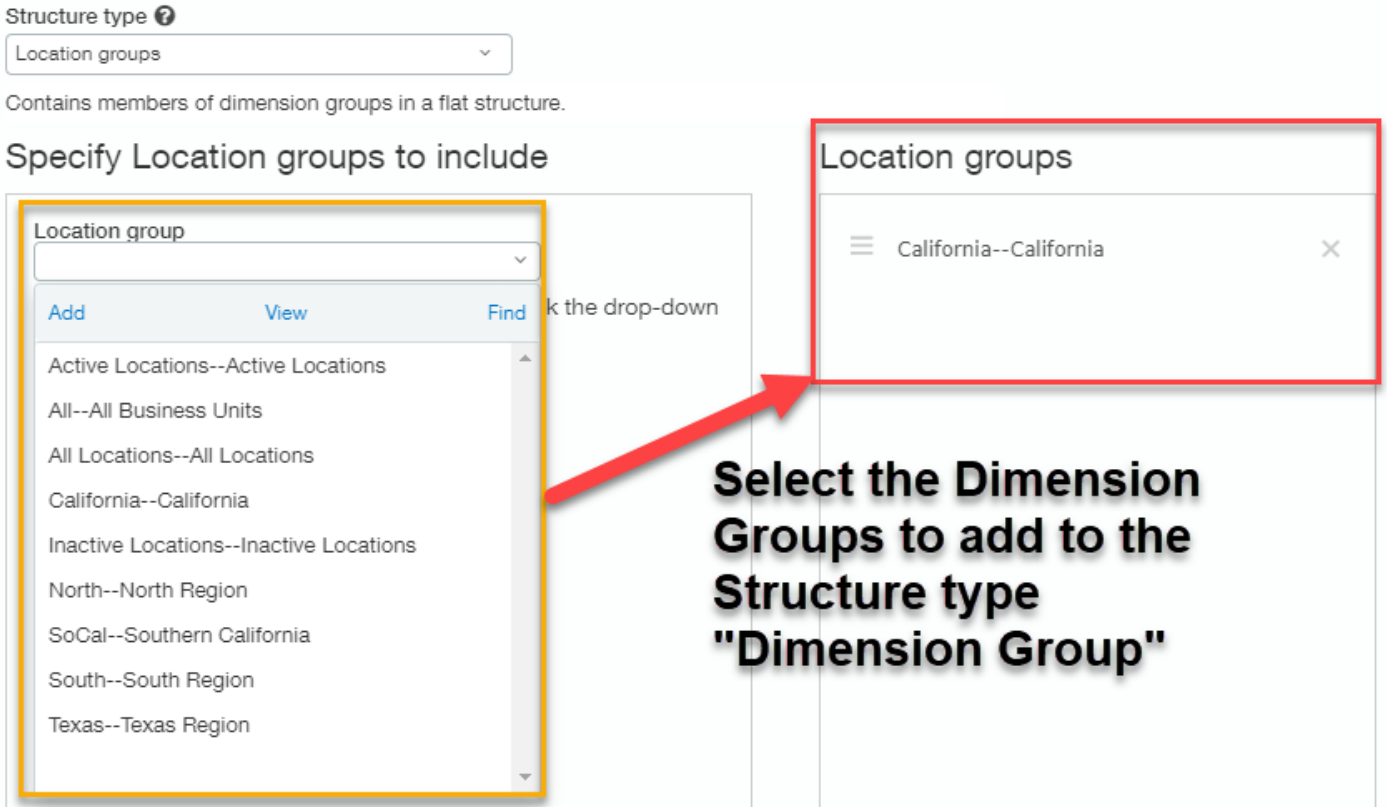
Selecting the Structure Type

- **Dimension groups**
  - This is a flat structure that contains the members of one or more dimension groups.



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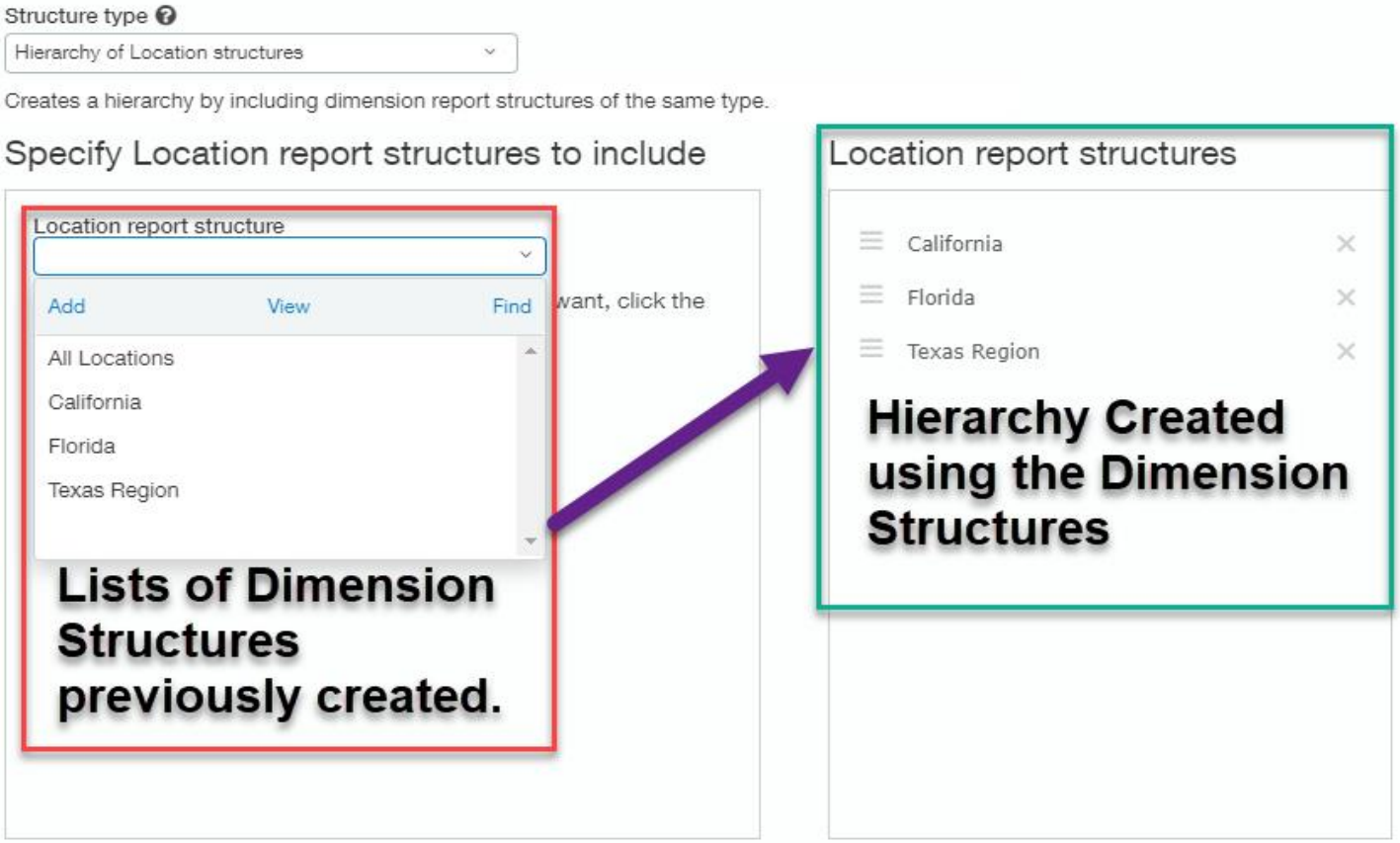
Selecting the Structure Type

- **Hierarchy of Dimension Structures**
  - Contains other dimension structures, which enables you to show organization, groupings, and subtotals on reports.



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Example of Dimension Structure Types

Dimension Group

California	Revenue
San Jose	7,000
San Diego	5,000
San Francisco	12,000
Total California	**24,000**

Dimension Hierarchy

State	Revenue
California	
San Jose	7,500
San Diego	4,500
Total California	12,000
Texas	
San Antonio	6,500
Dallas	5,500
Total Texas	12,000
Total States	**24,000**

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Dimension Structure

Demonstration

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Using Dimension Structures In Reports

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Financial Report Writer

- Report Info
- Rows
- Columns
- Computations
- Filters
- Format
- Permissions
- Next Steps

Tell us about your report

Report name: Dimension Report

Identifies the report so you can find it later.

Report type:

Report audience:

☑ This report is active

Report structure: ◉ Accounts ○ Dimensions

Determine the basic report structure by selecting what appears in rows.

☑ Filter by dimension structure on rows

	Prior Month	Prior Quarter
Revenue		
Kentwood Advisors Corp	800,000	2,950,000
Robinson Consulting	600,000	1,500,000
Total Revenue	1,400,000	4,450,000
Expenses		
Andrews implementation	40,000	75,000
Garcia Media design	10,000	15,000
Total Expenses	50,000	90,000

Accounts in rows:
Filtered by dimension on rows

Select this report structure to display account data on rows, with the option to filter by different dimension data.

In this example: Revenue is filtered for customers, while Expenses are filtered for projects. In both cases, the detail level on rows is set to show individual customers and projects.

Tell me how to create this report

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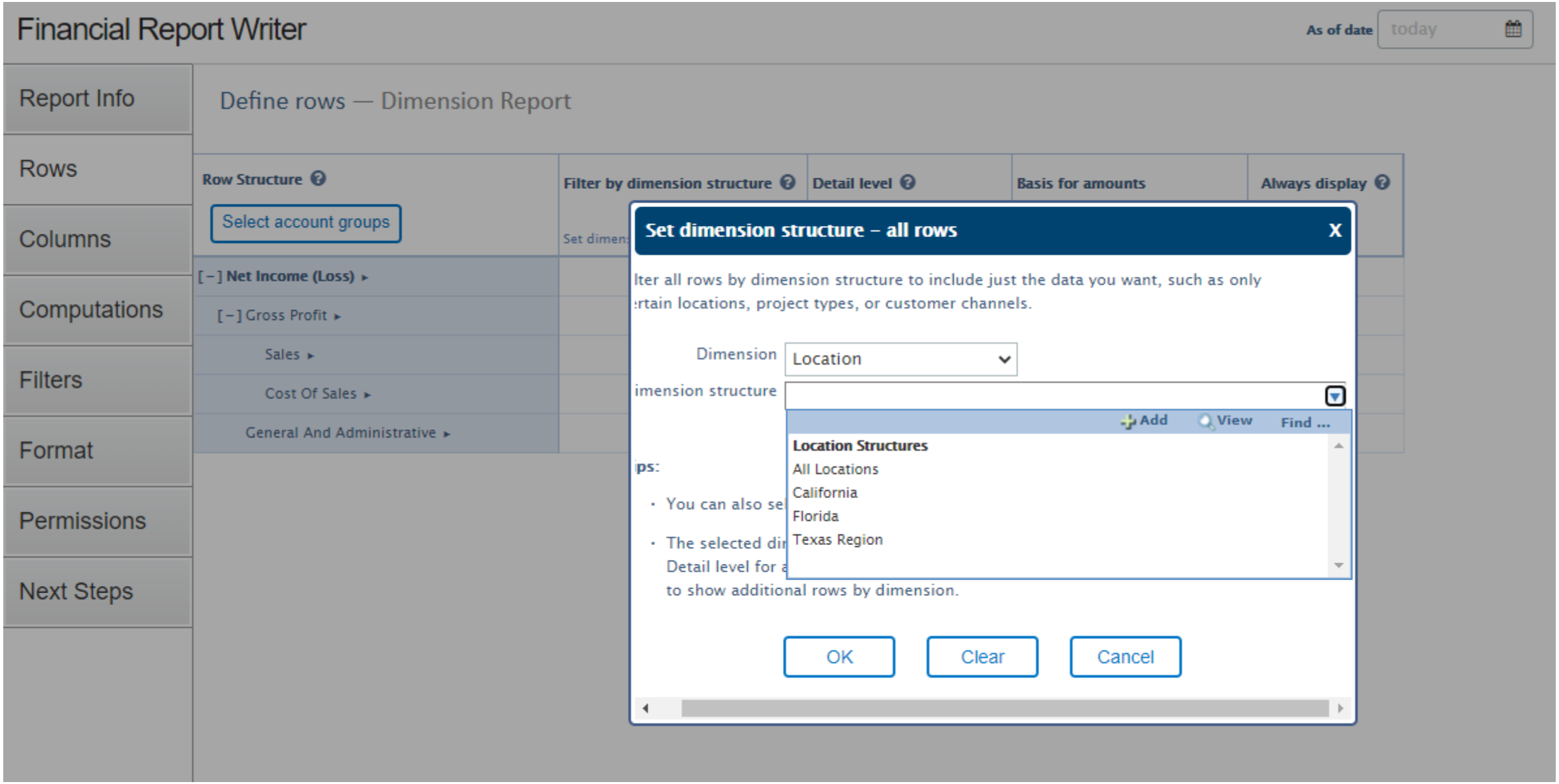

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Using Dimension Structures in Reporting

- By indicating “filter by dimension on rows” in the financial report writer, you can select a dimension Structure to breakdown sales data by state

Intacct MES - Dimension Report

Dimension Report

	Year Ending 12/31/2013 Actual
Net Income (Loss)	
Gross Profit	
Sales	
Southern USA	
California	39.00
Florida	1,299.00
Texas	2,099.00
Total Southern USA	3,437.00
Total Sales	3,437.00
Cost Of Sales	1,200.00
Total Gross Profit	2,237.00
General And Administrative	2,400.00
Total Net Income (Loss)	(163.00)

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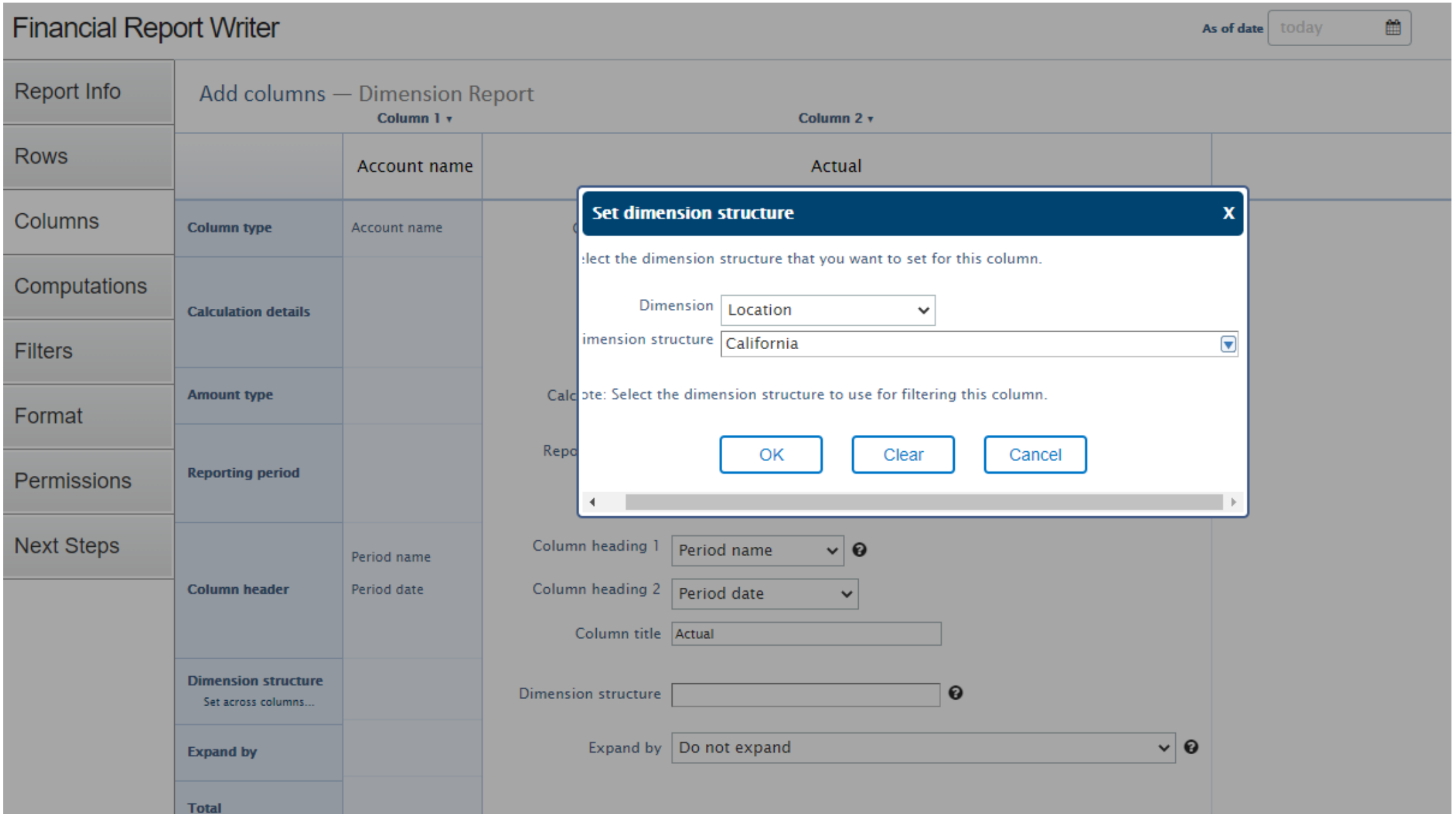

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Using Dimension Structures in Reporting

- By expanding the columns by the Dimension Structure, you are able to produce a comparative report with a total for each Dimension Group.

Dimension Report

				Southern USA
	California	Florida	Texas	Southern USA
	Year Ending	Year Ending	Year Ending	Year Ending
	12/31/2013	12/31/2013	12/31/2013	12/31/2013
	Actual	Actual	Actual	Actual
▼ Net Income (Loss)				
▼ Gross Profit				
▼ Sales				
Sales	39.00	909.00	2,099.00	3,047.00
Sales- Security Cameras	0.00	390.00	0.00	390.00
Total Sales	39.00	1,299.00	2,099.00	3,437.00
▼ Cost Of Sales				
Cost Of Goods Sold	15.00	735.00	450.00	1,200.00
Total Cost Of Sales	15.00	735.00	450.00	1,200.00
Total Gross Profit	24.00	564.00	1,649.00	2,237.00
▼ General And Administrative				
Travel & Entertainment- Lodging	0.00	0.00	1,400.00	1,400.00
Travel & Entertainment- Other	0.00	0.00	1,000.00	1,000.00
Total General And Administrative	0.00	0.00	2,400.00	2,400.00
Total Net Income (Loss)	24.00	564.00	(751.00)	(163.00)

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Dimension Structures in Report Writer

Demonstration

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Bonus Tips & Tricks

- From the dimension group list, click Members to quickly see the existing members of the group.
- Some dimension groups, such as customers, vendors, and items, can be found on multiple menus.
- You can view dimension structures from within the Financial Report Writer, at the time that you add a structure to a row or column.
- Use Dimension Groups to automatically filter components on a Dashboard
- If you want to select "one of" something, such as departments where the manager is either Jim, Sue, or Terri, create several filters and use the Any (OR) filter condition.

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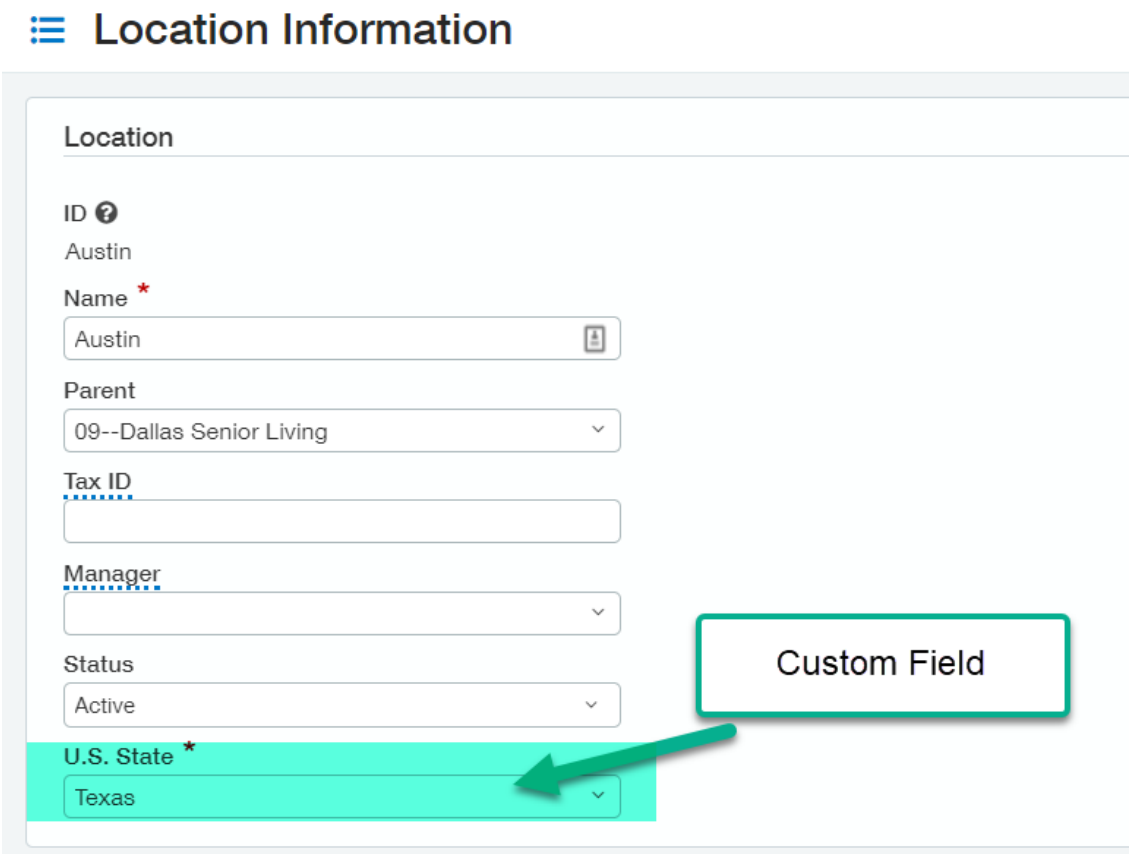
BONUS Tips & Tricks

- Dimension Groups work with Custom Fields!



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Key Points to Recap

- Dimension Groups and structures allow you to group dimensional data for strategic reporting
- Filtering by all members group type allow for dynamic groupings that are simple and scalable for your reporting needs
- Custom fields allow you to link unique reporting attributes to your dimension records

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