

The logo graphic consists of two overlapping chevron-like shapes. The top shape is a dark brown color, and the bottom shape is a light grey color. They are positioned such that they form a larger, abstract shape that resembles a stylized 'S' or a mountain peak.

# STONERIDGE CONNECT

2018 Client Conference



Dimensions: Improving Business Insight



# About the Speaker

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More about Sean:

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# About the Speaker

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**Matt Batalden**

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More about Matt:

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# Agenda

- Dimension Overview
  - What are Dimensions?
  - NAV2013 Redesign
  - Numbers You Should Know
  - Defaults and Priorities
- Getting More of Dimensions
  - Support Ticket Themes
  - Possible Modifications



# What are dimensions and where can I use them in NAV?

Edit - Acc. Schedule Overview - I\_INCEXP - BY DEPT

Analysis by Dimensions Matrix

Del

Mar

	Code	Name	Total Amount	ADM	PROD	SALES
Ge	42500	Total Sales of Resources				
Ar	43000	Sales of Raw Materials				
Co	43100	Sales, Raw Materials - Dom.	-8,570,831.05			-8,570,831.05
St	43200	Sales, Raw Materials - EU	-798,947.93			-798,947.93
row no.	Description		PROD	ADM	SALES	NO DEPT
10	Total Revenue (Credit)				-169,280.54	-4,000.00
11	Total Revenue				169,280.54	4,000.00
20	Total Goods Sold		-11,598.00		63,217.06	57,022.69
30	Total External Costs	535.98	208.11		2,006.26	954.31
40	Total Personnel Costs	355.73			1,185.78	
50	Total Depr. on Fixed Assets					
60	Other Expenses	180.25				36.15
70	Total Expenditure	-1,071.96	11,389.89		-66,409.10	-58,013.15
80	Earnings Before Interest	-1,071.96	11,389.89		102,871.44	-54,013.15

# Dimensions: Redesigned in NAV2013

## Advantages

- Lighter data footprint in database – all combinations represented by set ids
- Less dimension tables to keep in sync (only the set id and two globals are posted)
- Optimized posting performance

## Disadvantages

- Need to migrate data when moving from older NAV versions through NAV2013 (one-time, time consuming process)
- Cleaning up history through code can be trickier in some cases

# Numbers You Should Know

2, 4, 8

# 2 Global Dimensions

Edit - General Ledger Setup

HOME ACTIONS

CRONUS USA, Inc.

View Edit OneNote Notes Links Refresh Clear Filter Go to Previous Next

Manage Show Attached Page

### General Ledger Setup

General


Numbering

Dimensions

Global Dimension 1 Code:	DEPARTMENT	Shortcut Dimension 4 Code:	AREA
Global Dimension 2 Code:	PROJECT	Shortcut Dimension 5 Code:	BUSINESSGROUP
Shortcut Dimension 1 Code:	DEPARTMENT	Shortcut Dimension 6 Code:	SALESCAMPAIGN
Shortcut Dimension 2 Code:	PROJECT	Shortcut Dimension 7 Code:	
Shortcut Dimension 3 Code:	CUSTOMERGROUP	Shortcut Dimension 8 Code:	





# 4 Dimensions per Analysis View


 Edit - Analysis View Card - MATT


▼

HOME


 View


 Edit


 New

 Delete


Manage

 Update


 Enable Update on Posting


 Disable Update on Posting


Update

 Filter

Analysis

 OneNote

 Notes

 Links

Show Attached

MATT

General

Dimensions

Dimension 1 Code:	AREA	Dimension 3 Code:	SALESCAMPAIGN
Dimension 2 Code:	DEPARTMENT	Dimension 4 Code:	PURCHASER

# 8 Shortcut Dimensions

Edit - General Journal - CASH-Cash receipts and payments

HOME ACTIONS NAVIGATE MICROSOFT DYNAMICS NAV

Delete Reconcile Apply Entries... Preview Posting Card Dimensions Post Post and Print Test Report... Get Standard Journals... Save as Standard Journal... Email as Attachment Microsoft Excel Ledger Entries Refresh Find

Manage Bank Prepare Posting Standard Journal Send To History Page

Batch Name: CASH

Posting Date	Document No.	Account Type	Account No.	Amount	Bal. Account Type	Bal. Account No.	Department Code	Businessgroup Code	Customergroup Code	Project Code	Area Code	Salescampa... Code
1/25/2020	G00001	G/L Account		100.00	G/L Account	11200	SALES	HOME	LARGE	TOYOTA	40	SUMMER

# Default Dimensions

- Salesperson/Purchaser
- G/L Account
- Customer
- Vendor
- Item
- Resource Group
- Resource
- Job

- Bank Account
- Employee
- Fixed Asset
- Responsibility Center
- Item Charge
- Service Item
- Work Center

# Default Dimensions

## Batch Dimension Assignment

- Dimensions assigned Multiple

**Edit - Dimensions**

HOME

New Edit List Delete Map to IC Dim with Same Code Functions


**Dimensions**

Code	Name	Code Caption
AREA	Area	Area Code
BUSINESSGROUP	Business Group	Businessgroup Code
CUSTOMERGROUP	Customer Group	Customergroup Code
DEPARTMENT	Department	Department Code
PROJECT	Project	Project Code

**Account Type Default Dim.**

Table ID	Table Caption	Dimension Value Code	Value Posting
18	Customer	Code Mandatory	

# Dimension Priority

 Edit - Default Dimension Priorities

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HOME

CRONUS USA, Inc. ?

Delete

Refresh

Find

ManagePage

General

Source Code: SALES ▼

# Dimensions: Common Support Tickets

- Copy and pasting dimensions

Edit - Column Layout - BY DEPT - Departments As Columns

HOME

CRONT

Delete Refresh Find

Manage Page

Name: BY DEPT

Column No.	Column Header	Column Type	Amount Type	Formula	Department Code	Totaling
10	PROD	Net Change	Net Amount		PROD	
20	ADM	Net Change	Net Amount		ADM	
30	SALES	Net Change	Net Amount		SALES	
40	NO DEPT	Net Change	Net Amount			
C12/31/2017	CLOSE YEAR...	G/L Account	45001	-100.00	G/L Account	
C12/31/2017	CLOSE YEAR...	G/L Account	45001	-40.00	G/L Account	
C12/31/2017	CLOSE YEAR...	G/L Account	45001	-60.00	G/L Account	

# Dimensions: Possible Modifications

- Demonstrations
  - Code-Assisted Integration
  - Dimension Testing on Entry
  - GL/Dimension Combination Blocking
  - History Change Utilities / Options



# Links

- [Dimensions – Part 1 \(Improvements in RTC\)](#)
- [Dimensions – Part 2 \(Deployment\)](#)
- [Dimensions – Part 3 \(Extension\)](#)
- [How to Set Up Required Dimensions \(D365 BC\)](#)
- [Knowing When to Create a New Company or Company Dimension](#)
- [Microsoft \(MSDN\) Dimensions](#)



A stylized logo graphic consisting of a dark grey line forming a right-angled triangle pointing upwards and to the right, with a white line extending from the right angle towards the right.

# STONERIDGE CONNECT

2018 Client Conference



Questions?

# What's Next?

## More Information?

Talk to us! Or contact your account manager or project manager

## Need Support?

[navsupport@stoneridgesoftware.com](mailto:navsupport@stoneridgesoftware.com)

## Stay Connected

Sign up for our blog [stoneridgesoftware.com/blog](https://stoneridgesoftware.com/blog)