

Oracle Financial Services

Dimension Management User Guide



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1

Get Help

Topics:

- [Get Help in the Applications](#)
- [Learn About Accessibility](#)
- [Get Support](#)
- [Get Training](#)
- [Join Our Community](#)
- [Share Your Feedback](#)

Get Help in the Applications

Use help icons to access help in the application.

Note that not all pages have help icons. You can also access the [Oracle Help Center](#) to find guides and videos.

Additional Resources

- Community: Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- Training: Take courses on Oracle Cloud from [Oracle University](#).

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics, and are also available in this guide.

Get Support

You can get support at [My Oracle Support](#).

For accessibility support, visit Oracle Accessibility Learning and Support.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we would like to hear from you.

You can email your feedback to [My Oracle Support](#).

Thanks for helping us improve our user assistance!

2

Object Security

Object Security helps to secure data and also to decide what each user can access. You can apply Object Security to various object definitions like Hierarchy definitions, Filters, Expressions and Migration definitions.

You can assign specific user roles and functions to user groups, to implement Object Security. To assign user roles and functions, Seeded User Groups and Seeded User Roles are mapped to the User Groups. If you are using the Seeded User Groups, the security to access objects depends on the associated User Groups.

Map your User Group to the folder in case of public or shared folder, for creating/editing/copying/removing an object in Dimension Management module. You should also be the owner of the folder in case of Private Folder. Additionally, the WRITE role should be mapped to your User Group.

To access the link and the Summary page, map your User Group to ACCESS role. You can view all objects created in Public Folders - Shared Folders to which you are mapped and Private Folders for which you are the owner.

3

Dimension Management

Dimension Management facilitates you to categorize data into a single object as a Member; define levels and aggregate data to form the Hierarchies, and distinguish each member by defining the required Attributes.

The roles mapped to Dimension Management are as follows:

- Dimension Advanced
- Dimension Authorization
- Dimension Read Only
- Dimension Write

Components of Dimension Management

You can create and manage the following Object Definitions using from Dimension Management:

- [Members](#)
- [Attributes](#)
- [Hierarchy](#)

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Members

Dimension Members refer to the individual items that constitute a dimension when data is categorized into a single object such as Product, Organization, Time, and so on. Members are available within Dimension Management section.

Member Summary Page

The list of created member definitions are displayed in the Member Summary.

To access the Member Summary page, complete the following procedure.

1. From the left menu, click **Common Object Maintenance**.
2. Select Dimension Management and select **Member**.
The **Member Summary page** containing the following details is displayed.
 - **Alphanumeric Code**- The Alphanumeric Code assigned to a Member.
 - **Numeric Code**- The Numeric Code assigned to a Member.
 - **Name**- The Unique Member Name.
 - **Is Leaf**- The Leaf node status of the Member Definition.
 - **Yes**- The member is set as a Leaf node in any hierarchy and Child cannot be added to this node.
 - **No**- The member is a not a Leaf and can have Child nodes.
 - **Action**- Click to View, Edit, Copy or Delete a Member Definition.

Creating Member Definitions

You can add new Member Definitions from the Member Summary page.

To create a Member Definition in the Members page:

1. To create a Member definition, click the **Add** in the Member Summary page. The Add Member Definition page is displayed.
2. Enter the following **Member Details** as described in the following table:
 - **Dimension**- Select the Dimension to be associated with the new Member.
 - **Alphanumeric Code**- The Alphanumeric Code to be assigned to the new Member Definition.
You can enter up to 100 characters. We recommend using only Underscore (“_”) as a special character.
 - **Numeric Code**- The Numeric Code to be assigned to the new Member Definition.
You can enter the value between 0 and 999,999,999 manually or click **Generate**, to auto-generate a unique code.
If you enter the value manually, it is assigned after validation.
 - **Name**- The unique Member Definition Name.

You can enter up to 100 characters. All characters are allowed except " & ' and " ' " .

- **Description-** A brief description about the Member Definition.
You can enter up to 100 characters. All characters are allowed except " & ' and " ' " .
- **Is Leaf-** Check this option if the member is a Leaf of another member. By default, it is set to **Yes**.
 - **Yes-** The member can be used as a Leaf node in any hierarchy and Child cannot be added to this node.
 - **No-**The Member is not set as a Leaf and can have Child nodes.



Note:

If a Member is set as a Non-Leaf and is associated with Child nodes, it cannot be set as a Leaf again.

- **Enabled-** This field is set to **Yes** by default and can be edited only after the Member is created. To edit a Member, refer [Editing Member Definition Details](#).



Note:

You can change the option to **No** only when the particular member is not used in any hierarchy. The disabled members will not be displayed in Hierarchy Rules, or utilities which are based on Hierarchies, such as Hierarchy Filters and Hierarchical Assumption Browsers used in applications.

- **Copy Attribute Assignment-** Attach an existing attribute to this new Member Definition.
3. Click **Copy Attribute Assignment**, to access the **Attributes** page associated with the selected Dimension.

This is an optional field.

Click **Search** to locate a specific Member based on Alphanumeric Code, Numeric Code, Name, Description, Enabled status, Is Leaf status, Attribute Name, or Attribute Value. You can also enter any of these parameters as Keywords in the Search field and click **Search**.

4. Locate the Attribute to be copied and click **Move** and select **Copy**, located under **Actions**.
5. Click **Save**, to create the new Member definition and view it the Member Summary.

Click **Save and Add New**, to create the new member definition and proceed with adding another definition.

Managing Member Definitions

You can View, Edit, Copy, and Delete the existing Member Definitions from the Member Summary page.

In the Members Summary page, highlight a specific Member Definition and click the **Action**. The following Options are displayed:

- **View**- View the **Member Details** for a specific Member Definition.
- **Edit**- Edit the **Member Details** for a specific Member Definition.
- **Copy**- Copy the Member Definition Details and create another Member Definition by changing Alphanumeric Code, Numeric Code and Name.
- **Delete**- Delete the Member Definition Details.

Viewing Member Definition Details

You can view the details of an individual Member Definition, from Member Summary page.

To view a Member Definition, the Read Only Role should be mapped to your User Group.

You can view the details of an individual Member Definition, using the following procedure:

1. Highlight the Member Definition and click the **Action**.
2. Click the **View** button.

The Member Definition page is displayed with the details Dimension, Alphanumeric Code, Numeric Code, Name, Is Leaf and Enabled status.

Editing Member Definition Details

To edit the existing Member Definition details, the Write role should be mapped to your User Group.

You can edit individual Member Definition Details, using the following procedure:

1. Highlight the Member Definition and click the **Action**.
2. Click the **Edit** button.

The Member Definition page is displayed with the details Dimension, Alphanumeric Code, Numeric Code, Name, Is Leaf and Enabled status.

Edit the required information and click **Save**.

Copying Member Definition Details

To copy the Member Definition Details, the Write role should be mapped to your User Group.

You can copy individual Member Definition Details, to recreate another new Member Definition, using the following procedure:

1. Highlight the Member Definition and click the **Action**.
2. Click the **Copy** button.

The **Member Definition Page** is displayed with the details Dimension, Alphanumeric Code, Numeric Code, Name, Is Leaf and Enabled status.

Edit the unique information such as Name, Alphanumeric Code, Numeric Code and click **Save**.

Deleting Member Definition Details

To delete a Member Definition, the Write role should be mapped to your User Group.

You can delete individual Member Definition Details, using the following procedure:

1. Highlight the Member Definition and click the **Action**.
2. Click the **Delete** button.

The Member Definition is deleted after confirmation.

5

Attributes

Attributes refers to the distinguished properties or qualifiers that describes a Dimension Member. Attributes are applicable to key dimensions only.

Attribute Summary Page

The list of created Attribute Definitions are displayed in the Attribute Summary page.

To access the Attribute Summary page, complete the following procedure:

1. From the left menu, click **Common Object Maintenance**.
2. Select Dimension Management and select **Attribute**.

The **Attribute Summary page** containing the following details is displayed.

The Attribute Summary page provides the list of Member Definitions with the following details:

Field	Description
Code	The Numeric Code assigned to the Attribute Definition.
Name	The unique Attribute Definition Name.
Data Type	The Data Type associated with the Attribute. The Data Type is set to Date, Dimension, Number or String.
Required	• Yes – Attribute Value is mandatory for the Dimension Member. • No- The Attribute Value is optional for the Dimension Member.
Seeded	• Yes- This Attribute is seeded by the service. • No- The Attribute is created by the user.
Action	Click to View, Edit, Copy or Delete an Attribute Definition.

Navigating Attribute Summary Page

To access records in a Summary page, you can search, sort and navigate to multiple pages.

Creating Attribute Definition

To create a new Attribute for a dimension, complete the following steps:

1. Click the **Add** in the Attribute Summary page.
The **Add Attribute Definition** page is displayed.
2. Enter the Attribute Details as described in the following table:

Field	Description
Attribute Details	
Dimension	Select the Dimension for which the new Attribute is getting created.
Numeric Code	The Numeric Code to be assigned to the new Attribute Definition. You can enter the value manually or click Generate, to auto-generate a unique code. If you enter the value manually, the system will verify if the value is unique and assigns it. You can enter any number between 0 and 999,999,999.
Name	The unique Attribute Definition Name. You can enter up to 100 characters. All characters are allowed except " & ' and " ' ' ".
Alphanumeric Field Value	The name of physical column name that will be used to store attribute value in the Report Dimension Table. You can enter up to 100 characters. We recommend using only Underscore (" _ ") as a special character.
Description	A brief description about the Attribute Definition. You can enter up to 100 characters. All characters are allowed except " & ' + @ and ~.
Attribute Properties	
Data Type	Select the Data Type as Date, Dimension, Number, or String from the drop-down list. If Number is selected as the Data Type: Enter a Scale value ≥ 0. If it is left as 0, values for this attribute will be limited to Integers. If you wish to enable decimal entries for this attribute, the maximum Scale Value must be > 0 and $\leq$ the scale defined for NUMBER in the dimension's underlying attribute table. The maximum value of the NUMBER is set to 22.
Dimension	Select the Dimension to be associated with the new Attribute Definition. This field is enabled only if the Data Type is set to Dimension.

Field	Description
Default Value	The Default Value is set based on the selected Data Type. The Default Value is mandatory if this attribute is set as a Required Attribute. • If Dimension is set as the Data Type, select the Default Value from the drop-down list of members mapped to the selected Dimension. • If NUMBER is selected as the Data Type, enter a Numeric Value in the Default Value field, and it must be consistent with the Scale you have defined. • If DATE is selected as the Data Type: Click button to select a valid date as the Default Value from the calendar. • If STRING is selected as the Data Type: Enter the Alphanumeric Value in the Default Value field. The Maximum characters allowed in Default Value field for String Data Type is 1000.
Required Attribute	• Yes - This Attribute is mandatory for the associated Dimension Members. • No - This is an optional Attribute for the associated Dimension Members. This field is disabled in Add and Edit Modes if any members already exist for the Dimension on which this attribute is defined.
Seeded Value	• Yes – This is selected only when the attribute is seeded out of box by the Cloud Service. • No – Always select this when you are creating a new attribute.

3. Click **Save**.

Managing Attribute Definitions

You can view, edit, copy and delete the existing Attribute Definitions from the Summary page.

In the Attribute Summary page, highlight a specific Attribute Definition and click the **Action**. The following Options are displayed:

Field	Description
View	View the details for a selected Attribute.
Edit	Edit the selected Attribute.
Copy	Copy the Attribute Definition Details and create another Attribute Definition by changing the unique values like Alphanumeric Field Value, Numeric Code and Name.
Delete	Delete the selected Attribute.

Viewing Attribute Definition

You can view individual Attribute Definition Details at any given point. The Read Only role should be mapped to your User Group.

To view the existing Attribute Definition details in the Attribute page:

1. Highlight the Attribute Definition and click **Action**.
2. Click **View**.

The **Attribute Definition** Page is displayed with the details Code, Name, Data Type, Required and Seeded status.

Modifying Attribute Definition

Modify the Name, Description, or Default Value fields of an Attribute Definition. The Write role should be mapped to your User Group.

To modify an existing Attribute Definition in the Attributes summary:

1. Highlight the Attribute Definition and click **Action**.
2. Click **Edit**, to access the Attribute Definition page.

Edit the required information and click **Save**.

You can view the updates in the Attributes summary.

Copying Attribute Definition

The Copy Attribute Definition facilitates you to quickly create a new Attribute Definition based on the existing attributes or by updating the values of the required attributes.

To copy an existing Attribute Definition, the Write role should be mapped to your User Group.

Refer to the following steps, to copy an Attribute Definition.

1. Highlight the Attribute Definition and click **Action**.
2. Click **Copy**.

The Attribute Definition page is displayed with the details: Code, Name, Data Type, Required and Seeded status.

Edit the unique information such as Name, Alphanumeric Field Value, Numeric Code and click **Save**.

Deleting Attribute Definition

You can remove the Attribute Definitions which are not required in the system by deleting from the Attributes Summary.

To delete an attribute definition, the Write role should be mapped to your User Group.

1. Highlight the Attribute Definition and click the **Menu** button.
2. Click the **Delete** button.

The Attribute Definition is deleted after confirmation.

 Note:

You cannot delete a definition if any dependency like Attribute, Hierarchy or Filter is attached to it. Detach the dependency before deleting the definition.

6

Hierarchy

Hierarchies refer to Dimension Members that are arranged in levels, with each level representing the aggregated total of the data from the level below. One dimension type can have multiple hierarchies associated with it. Hierarchies are available within the Dimension Management section.

A Default Hierarchy definition is required to support BI Users to perform multidimensional analysis, in the BI reporting. The hierarchy name of a default hierarchy definitions are suffixed with the term **System Hierarchy**. You can only view the details of the default hierarchy, from the Hierarchy Summary page. All orphan members under their corresponding default hierarchy, are automatically updated, when they are added/deleted to/from the system.

Hierarchy Summary Page

The list of created Hierarchy definitions are displayed in the Hierarchy Summary.

To access the Hierarchy Summary page, complete the following procedure:

1. From the left menu, click **Common Object Maintenance**.
2. Select Dimension Management and select **Hierarchy**.

The Hierarchy Summary page provides the list of Member Definitions with the following details:

Field	Description
Name	The unique Hierarchy Name.
Description	The brief description about the Hierarchy.
Folder	The folder in which the Hierarchy is stored.
Dimension	The Dimension associated with the Hierarchy.
Tag	Tags are labels that help to simplify the data search and locate the required details.
Action	Click to View, Edit, Copy or Delete a Hierarchy Definition.



Note:

The name of a default hierarchy is always suffixed with the term **System Hierarchy**.

Navigating Hierarchy Summary Page

To access records in a Summary page, you can search, sort and navigate to multiple pages.

Creating Hierarchy Definitions

To create a Hierarchy Definition in the Hierarchy Summary page, complete the following steps:

- 1. To create a Hierarchy definition, click **Add** in the Hierarchy Summary page. The **Add Hierarchy Definition** page is displayed.

Enter the **Hierarchy Details** as described in the following table:

Table 6-1 Field Description

Field	Description
Basic Details	
Name	The unique Hierarchy Definition Name.  Note: You can enter up to 100 characters. All characters are allowed except " & ' and " ' ".
Description	A brief description about the Hierarchy Definition.  Note: You can enter up to 100 characters. All characters are allowed except " & ' + @ and ~.
Hierarchy Sub Type	By default, the sub type is set to Member based and cannot be changed.
Folder	Select the Folder in which the Hierarchy is to be stored.
Based On	
Dimension	Select the Dimension to be associated with the new Hierarchy Definition.
Start Date	The date from which this Hierarchy will be activated. By default the Start Date is set to the current System Date.
Data Grid	

Table 6-1 (Cont.) Field Description

Field	Description
Hierarchy View	The Members associated with the selected Dimension are displayed. You can sort this list in Ascending/Descending order, expand or collapse the list to view in details and search for a specific Member. You can focus on a Member to view the Member Properties. You can add a Child or add a Sibling to an existing Member in the Data Grid.
Search Results	The search results based on the specific keyword entered to search a Member is populated.

To Add a Child to the Hierarchy:

- a. Right-click in the **Hierarchy View** tab.
- b. Select **Add Child** option and the **Add Member Page** are displayed.
- c. Select the required Member and click **Move**, to move the Member to the Selected Members panel. To select multiple members, press CTRL and select the members. The selected members are added to the **Selected Members** panel.
 - Click **Move All** to move all Members listed in the Show Members pane, to the Selected Members pane. Click **Fetch from DB** to select all nodes/ members in the server.
 - Select a member and Click **Remove** to deselect a Member. To remove multiple members, press CTRL and select the members.
 - To remove all the members from the **Selected Members** pane, click **Remove all**.
 - You can click **Search** button for the required member using Alphanumeric Code, Numeric Code, Name, Description, Attribute Name, or Attribute Value. Enter the search criteria and Click **Search**, in the Search Panel.
 - You can also click **Search** button to toggle the display of Numeric Code left, right, or name and click button to display Alphanumeric Code left, right, or name.
- d. Click **OK**. The selected Member is displayed as Child under **Data Grid** panel in the **Hierarchy View** tab.

2. To add a Sibling to the Child in the Hierarchy Definition:

- a. Right-click on the Child and select the option **Add Sibling**. The **Add Sibling** Page is displayed.
- b. Select the required Members and **Move**, to move the Member to the Selected Members panel. The Member is displayed in the **Selected Members** panel.
- c. Click **OK**. The selected Member is added as **Sibling** below the **Parent** under Data Grid Panel in the **Hierarchy View** Tab.

3. To add a Leaf under a Parent/Child or Sibling:

- a. Right-click the Parent or Child and select **Add Leaf**. The Add Member Page is displayed.

- b. Select the required Members and click **Move**, to move the Member to the Selected Members panel.
The Member is displayed in the **Selected Members** panel.
 - c. Click **OK**. The selected Member is displayed as Leaf below the Parent or Sibling under **Show Hierarchy** Panel in the Hierarchy View Tab.
4. **To define Level Properties:**
 - a. Right-click the Parent or Child and select **Level Properties**. The details are displayed in the Member Properties Panel.
 - b. Enter the valid **Name** and **Description** in the respective fields.
 - c. Click **OK** and the Levels defined are displayed in the drop-down in **Initial Level Display** field in **Data Grid** in **Hierarchy View** Tab.
5. **To cut and paste Child or Sibling:**
 - a. Right-click on any node and select **Cut**.
 - b. Right-click on any node and **Paste as Child** or **Paste as Sibling**.
6. **To Delete/Undelete**
 - a. Right-click on the node to be deleted and select **Delete Node**.
The node deleted is struck out.
 - b. Right-click and select **UnDelete** to cancel deletion of the node.
7. To view the Member Properties and Member Attributes of a node in the **Hierarchy View** Panel:
 - a. Click on a Member.
The properties such as Alphanumeric Code, Numeric Code, Name, Description, Enabled, Is Leaf, Created By, Creation Date, Last Modified By, Last Modification Date, Attribute, and Value of the selected Member are displayed in the Member Properties and Member Attributes Grids.

In the Hierarchies page you can also:
 - Click **Collapse** or Expand, to collapse or expand a branch .
 - Click **Focus** or **Unfocus**, to focus or unfocus a selected node except the Root Node.
 - Click **Sort** to sort the list in ascending or descending order.
8. Click **Save**.
The new Hierarchy Definition is created successfully.

Audit Info

The Audit Info section provides details such as Created By and Modified By Users, Creation and Modification Date, and Authorized By user Details. You can add additional information as comments and tags. Tags are labels that help to simplify the data search and locate the required details.

Managing Hierarchy Definitions

You can View, Edit, Copy, and Delete the existing Hierarchy Definitions from the Hierarchy Summary page.

In the Hierarchy Summary page, highlight a specific Hierarchy Definition and click **Action**. The following options are displayed:

Field	Description
View	View the Hierarchy Details for a specific Member Definition.
Edit	Edit the Hierarchy Details for a specific Member Definition.
Copy	Copy the Hierarchy Definition details and create another Hierarchy Definition by changing the unique values like Name, Description and so on.
Delete	Edit the Hierarchy Definition Details.

Viewing Hierarchy Definition Details

You can view the details of an individual Hierarchy Definition, using the following procedure:

1. Highlight the Hierarchy Definition and click **Action (three dots)**.
2. Click **View**.

The Hierarchy Definition page is displayed with the details Name, Description, Folder, Dimension, Start Date and Hierarchy View details.

Editing Hierarchy Definition Details

You can edit individual Hierarchy Definition Details at any given point.

To edit the existing Hierarchy Definition Details:

1. Highlight the Hierarchy Definition and click the **Action (three dots)**.
2. Click **Edit**.

The Hierarchy Definition Page is displayed with the details Name, Description, Folder, Dimension, Start Date and Hierarchy View details.

Edit the required information and click **Save**.

Copying Hierarchy Definition Details

You can copy individual Hierarchy Definition Details, to recreate another new Member Definition. To copy the Member Definition Details:

1. Highlight the Hierarchy Definition and click **Action**.
2. Click **Copy**.

The Hierarchy Definition page is displayed with the details Name, Description, Folder, Dimension, Start Date and Hierarchy View details.

Edit the unique information such as Name, Description, Folder, Dimension, Start Date and Hierarchy View details and click **Save**.

Deleting Hierarchy Definition Details

To delete a Hierarchy Definition:

1. Highlight the Hierarchy Definition and click **Action**.
2. Click **Delete**.

The Hierarchy Definition is deleted after confirmation.

 Note:

You cannot delete a definition if any dependency like Attribute, Hierarchy or Filter is attached to it. Detach the dependency before deleting the definition.

7

Viewing Data in a Summary Page

A Summary page will contain a list of definitions associated with a specific Dimension Data, Filters, Batch or Schedules.

You can search, filter and customize the view to access the required data faster.

Searching Summary

Search for a specific Definition based on the following criteria. Select/Enter one or more unique values/tag or Leaf and Enabled status associated with the definition and click **Search**.

Sorting a Summary Page

Sort the list of definitions, to view a specific definition, in a definition Summary .

To sort the various Definitions list:

- **Sort By:** Group the based on the following fields:
 - **Member Summary** - Dimension, Name, Alphanumeric Code, Numeric Code, Enabled and Is Leaf Status, Attribute Name (if the selected Dimension has Dimension Type Attribute) and Attribute Value.
 - **Attribute Summary** - Branch, Name, Code and Data Type.
 - **Hierarchy Summary** - Dimension, Name, Tag and Folders.
 - **Filter Summary** - Name, Folder and Filter Type.
- **Sort Order:** Sort the Complete list in Ascending/Descending order.

Setting Number of Records per Page

Customize the number of records per page, to access the required record easily.

At the bottom of the page, you can enter the number of entries that are available on a single page in the **Records** box. By default, this value is set to 8. You can increase or decrease the number of entries that are displayed using the up and down arrows.

To access a particular page, enter that page number in the Page Box located at the bottom of the page.

To navigate between pages:

- Use **First page** to view the entries in the first page.
- Use the **Previous page**, to view the entries in the previous page.
- Use the **Next page**, to view the entries in the next page.
- Use the **Last page**, to view the entries in the last page.