



BI4Dynamics AX Customization Manual

Last update: October 2017, version 6

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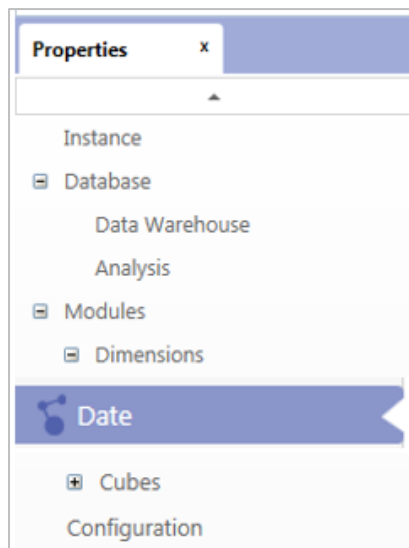
Total pages: **22**

1 SETTING UP INSTANCE

Upon opening the instance, proceed to Instance properties by clicking File and Properties.

1.1 Setup dimensions

Set Date



New BI4Dynamics feature (Fiscal Year Date Dimension) allows you to analyze your data by Fiscal Date instead of the calendar date.

Set the Fiscal Date Offset in line with the start of your Fiscal Year or choose the 4-4-5 calendar option, which enables you to analyse your data by selected quarters.



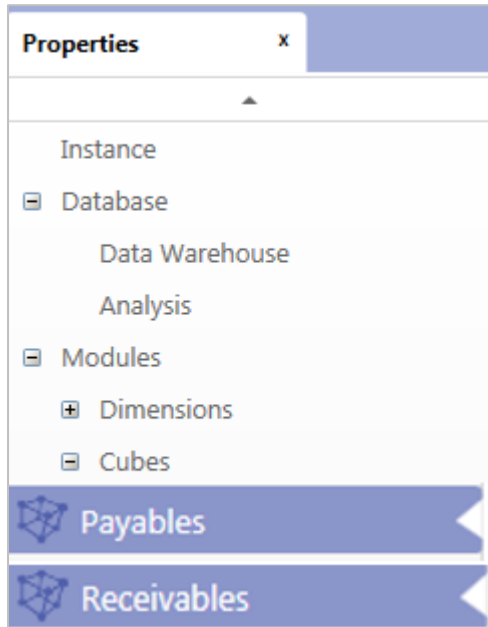
- Example 1: If your Fiscal Year starts with April, set the Fiscal Date Offset to 3.
- Example 2: If your Fiscal Year starts with July, set the Fiscal Date Offset to 6.
- Example 3: Select one of the options (4-4-5, 4-5-4 or 5-4-4) and the starting date

Select one of the following options to set-up Fiscal date:

<input checked="" type="radio"/> Starting month	Starting month is not January.	Select starting month:	<div>January ▾</div>
<input type="radio"/> 4-4-5 calendar	Year is divided into 4 quarters, 13 weeks each. Select 445, 454 or 554 type.	Select calendar type:	<div>454 ▾</div>
		Select starting date:	<div>29-06-2017 <div>15</div></div>
<input type="checkbox"/> Fiscal Year name will be set to the following Calendar Year name.			

1.2 Setup cubes

Set Receivables or Payables compression



New BI4Dynamics feature (set Receivables or/and Payables compression) allows to set the number of months in which the receivables or payables balance is calculated on a daily basis.

Defining how the balance is calculated before the selected period is limited to Monthly or Yearly option, but Daily option can be used as well to keep the calculation on a daily level.

Limiting the receivables or payables balance calculation will greatly improve the processing times.

The default setting for this new feature can be seen bellow.

Module settings	
Period (in months) when receivables balance is calculated daily:	<input type="text" value="6"/>
Outside of the selected period or outside of the current year (whichever occurs first) calculate receivables balances:	<input type="text" value="Monthly"/> <input type="button" value="Apply"/>

1.3 Manage stage

Filter data stage

A new BI4Dynamics functionality is introduced in version 5. You now have the ability to filter the transaction data loaded from one or more AX databases or companies to BI4Dynamics stage.

To better understand this feature we prepared a simple example its usability. We will show you how to filter closing receivables balance in archive database without altering data in AX:

1 CHECK BALANCES

1. Check that ending balance in old company equals to opening balance in new company

- Use Dynamics AX report and Excel from BI4Dynamics cube
- If balances do not match – stop!
- Get it sorted out

Example:

	A	B	C	D	E	F	G	H	I	J
1						old	new			
2	Receivables Balance									
3		DE	DE Total	NL	NL Total	UK		UK Total		
4		DE 2009		NL 2009		UK 2009	CRONUS 2017			
5	2013	786,217	786,217	3,330,725	3,330,725	262,229		262,229		
6	2014	1,349,950	1,349,950	3,330,725	3,330,725	695,676		695,676		
7	2015	3,330,725	3,330,725	3,330,725	3,330,725	1,335,765		1,335,765		
8	2016									
9	2016 - Jan	3,330,725	3,330,725	3,330,725	3,330,725	1,358,642		1,358,642		
10	2016 - Feb	3,330,725	3,330,725	3,330,725	3,330,725	1,389,052		1,389,052		
11	2016 - Mar	3,330,725	3,330,725	3,330,725	3,330,725	1,405,523		1,405,523		
12	2016 - Apr	3,330,725	3,330,725	3,330,725	3,330,725	1,446,699		1,446,699		
13	2016 - May	3,330,725	3,330,725	3,330,725	3,330,725	1,493,569		1,493,569		
14	2016 - Jun	3,330,725	3,330,725	3,330,725	3,330,725	1,549,570		1,549,570		
15	2016 - Jul	3,330,725	3,330,725	3,330,725	3,330,725	1,593,003		1,593,003		
16	2016 - Aug	3,330,725	3,330,725	3,330,725	3,330,725	1,615,869		1,615,869		
17	2016 - Sep	3,330,725	3,330,725	3,330,725	3,330,725	1,662,351		1,662,351		
18	2016 - Oct	3,330,725	3,330,725	3,330,725	3,330,725	1,826,202		1,826,202		
19	2016 - Nov	3,330,725	3,330,725	3,330,725	3,330,725	2,244,835		2,244,835		
20	2016 - Dec	3,330,725	3,330,725	3,330,725	3,330,725	4,252,828	4,252,828	8,505,655		
21	2017									
22	2017 - Jan	3,330,725	3,330,725	3,330,725	3,330,725	4,252,828	4,252,828	8,505,655		
23	2017 - Feb	3,330,725	3,330,725	3,330,725	3,330,725	4,252,828	5,185,243	9,438,071		
24	2017 - Dec	3,330,725	3,330,725	3,330,725	3,330,725	4,252,828	6,255,790	10,508,617		
25	Grand Total	3,330,725	3,330,725	3,330,725	3,330,725	4,252,828	6,255,790	10,508,617		
26										

Status:

Closing balance in old company - UK 2009 equals Opening balance in Cronus 2017. This is OK

Goal of this project:

Closing balance in old company - UK2009 - should be set to zero in BI and keep data in AX unchanged.

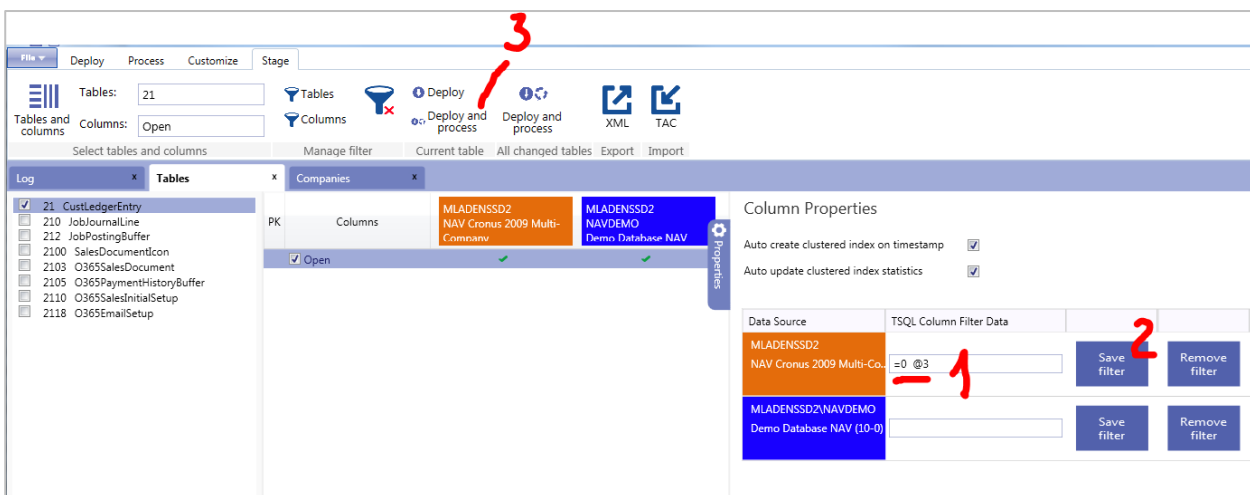
2. Check Receivables Balance in SQL (run SQL report)

- Total Balance must match AX (per company)
- Balance of all open entries must match total Balance
- Balance of all closed entries must be zero
- If Balances do not match – stop!
- Get it sorted out

2 FILTER STAGE

3. Go to filter area and select old data source (your selection is on T=21/F=Open)
4. Set value: =0 (see picture #1)
 - only closed entries will be copied from AX
 - As we filter integer type of field, so there is no '0' or "0", only 0.
 - Set the number of the company that you apply this rule
 - =0 @3 (this will apply filter for CompanyID=3, and get all data from other companies with filter into BI4Dynamics)
5. Run "Save filter" (see picture #2)
6. Run "Deploy & Process" on Current Table (see picture #3)
 - Deploy will apply filter to the stage
 - Process will select data from AX

Example:



7. Check filters on staging area – this step is optional (run SQL report)

Example:

100 %

Results

Messages

	TableID	TableNameStage	ColumnNameStage	ColumnType	ColumnFilterData	DatabaseName
1	21	CustLedgerEntry	Open	tinyint	=0 @3	NAV Cronus 2009 Multi-Company

8. Process DW, cubes

3 CONTROL

9. Check report in Excel
 - Receivables balance in old company (the one that we have filtered) should be zero!

Example:

					old	new			
Receivables Balance									
	DE	DE Total	NL	NL Total	UK		UK Total		
	DE 2009		NL 2009		UK 2009	CRONUS 2017			
2013	786,217	786,217	3,330,725	3,330,725	609,093		609,093		
2014	1,349,950	1,349,950	3,330,725	3,330,725	463,821		463,821		
2015	3,330,725	3,330,725	3,330,725	3,330,725	663,045		663,045		
2016									
2016 - Jan	3,330,725	3,330,725	3,330,725	3,330,725	734,831		734,831		
2016 - Feb	3,330,725	3,330,725	3,330,725	3,330,725	637,749		637,749		
2016 - Mar	3,330,725	3,330,725	3,330,725	3,330,725	645,124		645,124		
2016 - Apr	3,330,725	3,330,725	3,330,725	3,330,725	1,078,146		1,078,146		
2016 - May	3,330,725	3,330,725	3,330,725	3,330,725	479,159		479,159		
2016 - Jun	3,330,725	3,330,725	3,330,725	3,330,725	567,579		567,579		
2016 - Jul	3,330,725	3,330,725	3,330,725	3,330,725	646,458		646,458		
2016 - Aug	3,330,725	3,330,725	3,330,725	3,330,725	896,623		896,623		
2016 - Sep	3,330,725	3,330,725	3,330,725	3,330,725	1,014,909		1,014,909		
2016 - Oct	3,330,725	3,330,725	3,330,725	3,330,725	795,736		795,736		Date: 31-12-2016
2016 - Nov	3,330,725	3,330,725	3,330,725	3,330,725	504,677		504,677		closing balance
2016 - Dec	3,330,725	3,330,725	3,330,725	3,330,725		4,252,828	4,252,828		opening balance
2017									
2017 - Jan	3,330,725	3,330,725	3,330,725	3,330,725		4,252,828	4,252,828		
2017 - Feb	3,330,725	3,330,725	3,330,725	3,330,725		5,185,243	5,185,243		
2017 - Dec	3,330,725	3,330,725	3,330,725	3,330,725		6,255,790	6,255,790		
Grand Total	3,330,725	3,330,725	3,330,725	3,330,725		6,255,790	6,255,790		

4 APPENDIX

If you need to filter more companies from same data source that add CompanyID by comma:

=0 @3,4

This will apply filter for CompanyID=3 and 4

Filter has to be set per data source.

=0 @1,3,4

If CompanyID=1 is in other data source than filter will not apply to CompanyID=1.

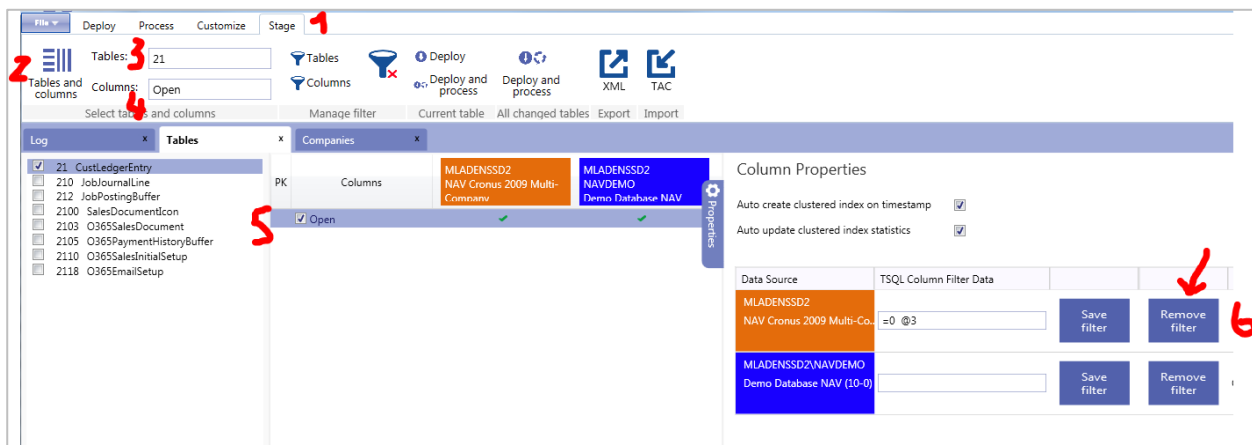
5 TROUBLESHOOTING

If something went wrong, you can delete filter at any time without effecting AX.

10. Go to Stage\\Tables & Columns\\Tables=21, Columns=Open\\ select the column Open

11. Run Remove filter (see picture #6)

Example:



12. Run "Deploy & Process" on Current table area button

13. Process DW, Cubes

2 SETUP FOLDER

Computer > Local Disk (C:) > Program Files (x86) > BI4Dynamics AX > BI4AX >			
Include in library ▾ Share with ▾ Burn New folder			
Name	Date modified	Type	Size
0 Setup	28/06/2017 09:24	File folder	
1 Stage (DW)	03/04/2017 09:30	File folder	
2 Snapshot	03/04/2017 09:30	File folder	
3 Dimensions (DW)	03/04/2017 09:30	File folder	
4 Facts (DW)	03/04/2017 09:30	File folder	
5 Cubes (SSAS)	03/04/2017 09:30	File folder	
6 Wizard	06/07/2017 15:37	File folder	
7 Visual Studio project	28/06/2017 09:24	File folder	
Unhandled Exceptions	25/09/2017 09:01	File folder	
BI4AX.bi4ax	01/09/2017 10:41	BI4AX File	5.948 KB
BI4AX.license	01/09/2017 10:36	LICENSE File	43 KB
BI4AX.log	01/09/2017 10:41	Text Document	1.275 KB

Local Disk (C:) > Program Files (x86) > BI4Dynamics AX > BI4AX > 0 Setup >		
Include in library ▾ Share with ▾ Burn New folder		
Name	Date modified	Type
MetaData	29/09/2017 08:46	File folder
Roles and Permissions	29/09/2017 10:40	File folder
SSIS	29/09/2017 10:45	File folder
Virtual Cubes	29/09/2017 10:45	File folder

- MetaData (automatic retrieval of AX Metadata)
- Roles and Permissions (automated saving and applying roles and permissions from analysis cube)
- SSIS (SQL Server Integration Services Processing)
- Virtual Cubes (easily creating a brand new virtual cube)

2.1 MetaData

Information about AX structures is needed in order BI4Dynamics Wizard to work. We call this set »AX metadata«. It includes tables, fields, keys, translations, table relations and more.

Metadata - logical explanation

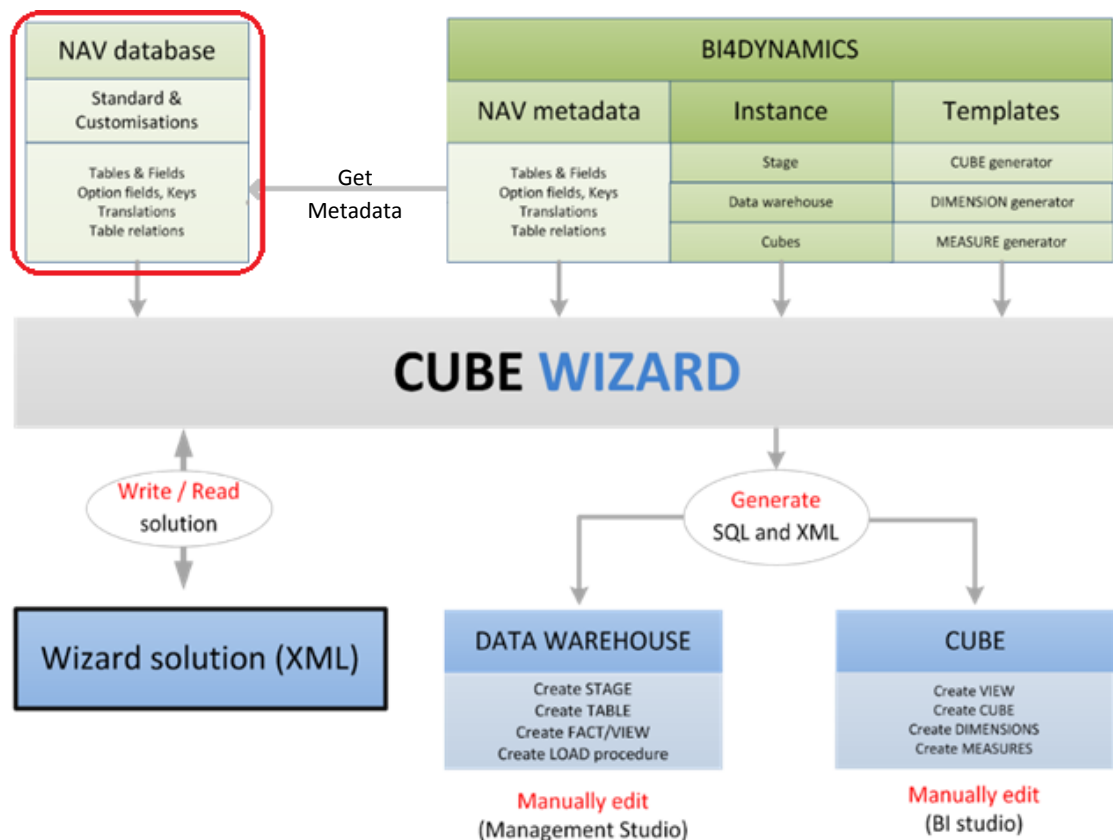
By AX metadata we understand information about AX structures that are needed for Wizard. Without this information Wizard would not work.

Metadata - physical explanation

AX metadata is an AX table filled by AX services. This table is filled by information about AX structures. These information are brought into BI part of SQL database and are used by Wizard. Following information are read from AX:

1. Tables, fields
2. Translation
3. Table keys
4. BI dimension and table relations
5. AX table relations

All tables and fields (standard and customized) are available.



2.2 Roles and Permissions

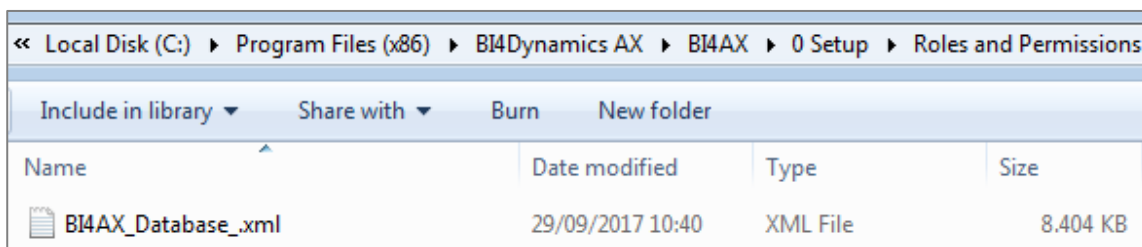
BI4DynamicsAX version 4.2 introduced a new functionality which enable us to keep the security settings on the analysis database intact. In previous versions, the roles which were set up on the analysis database were not restored after Deploy All.


Saving Roles and Permissions

Roles and Permissions are stored to folder automatically:

- before Deploy
- before Processing data

An .xml script of the analysis database (together with Roles and permissions) is saved to “Roles and Permissions” folder.



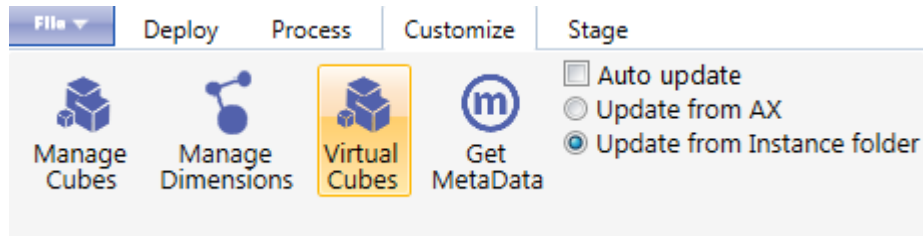
« Local Disk (C:) ▶ Program Files (x86) ▶ BI4Dynamics AX ▶ BI4AX ▶ 0 Setup ▶ Roles and Permissions			
Include in library ▼ Share with ▼ Burn New folder			
Name	Date modified	Type	Size
 BI4AX_Database_.xml	29/09/2017 10:40	XML File	8.404 KB

Restoring Roles and Permissions

Roles and permissions will be automatically restored to analysis database at the end of each Processing.

2.3 Virtual cubes

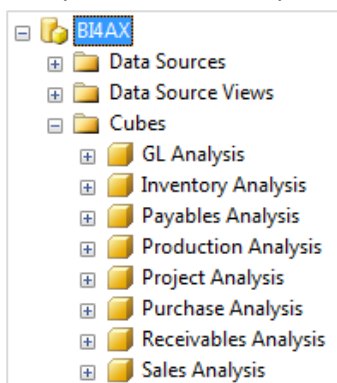
Virtual Cubes can be easily created from physical cubes (standard and wizard created cube) by accessing Virtual Cubes menu in Customize tab of BI4Dynamics application.



Each deploy updates physical and virtual cubes structures, while each process updates the data from AX.

Initial state

BI4Dynamics standard package cubes are deployed and processed.

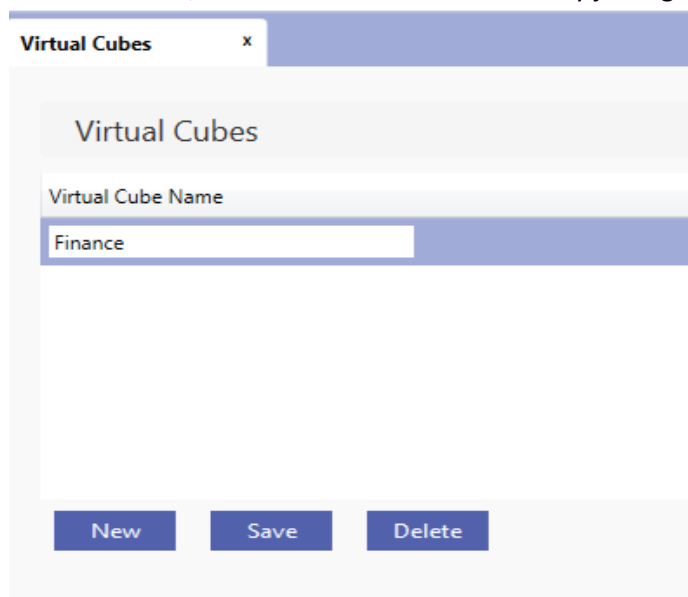


View from Management studio

Create virtual cube

Create a new, empty cube by clicking **New** in the Virtual cube tab and choose the same name as you would like the new cube to be named.

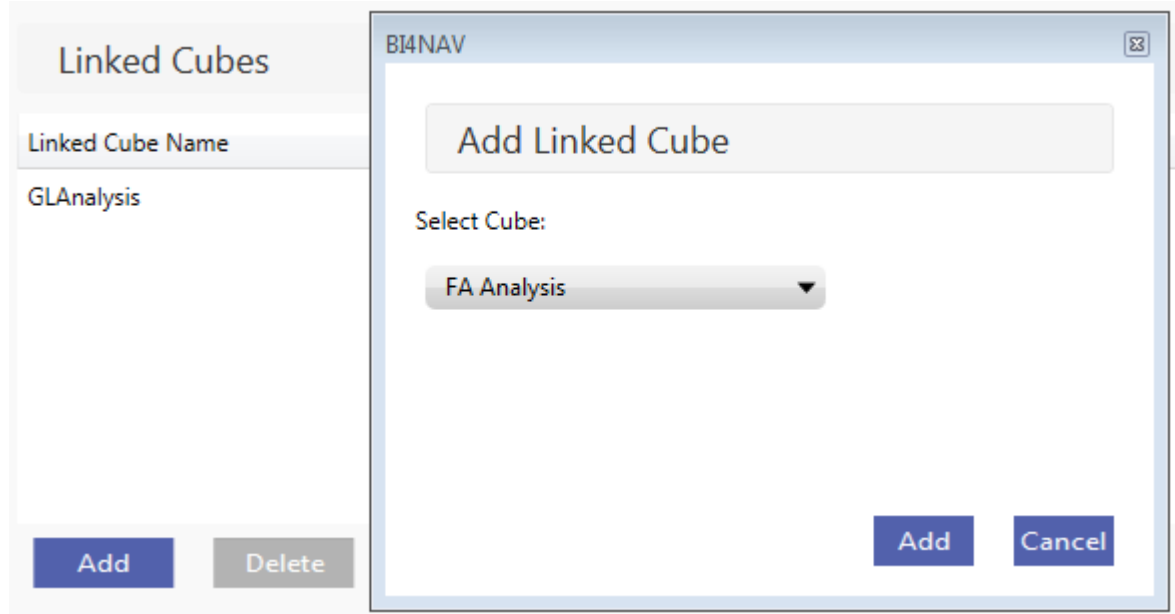
In this scenario, we will create a Finance cube by joining General Ledger and Fixed Assets cubes.



Which cubes would you like to join?

On the right side of the screen, click **Add** and choose the cubes you would like to join in the new Finance virtual cube.

You can join all BI4Dynamics standard package cubes or select just few of them. In our case, we have selected General Ledger and Fixed Assets cubes.



Click save.

New file

A new .txt file is automatically generated in Virtual Cube folder (0 Setup).

Deploy and Process

Virtual cubes are deployed and processed after physical cubes. This ensures that all changes (structures and content) in physical cubes will be included in virtual cubes.

New virtual cube is ready to use!

All measures from physical cubes are available in new virtual cube – Finance.

2.4 SSIS Processing

SQL Server Integration Services processing will process the SSIS packages containing BI4Dynamics stored procedures parallel. If not installed or selected, loading stage tables and processing DW tables will run sequentially, one stored procedures after another.

SQL Server Integration Services processing can be turn on during the creation of the instance or turn on/off from the BI4Dynamics application File menu.

File→Edit→Options→Check/Uncheck SQL Integration Service

Edit instance

Instance type: Dynamics AX

License key: Import

Name: BI4AX

Language: English (United States)

Options

SQL Database File Locations

Data: C:\Program Files\Microsoft SQL Server\MSSQL ...

Log: C:\Program Files\Microsoft SQL Server\MSSQL ...

SQL Database Collation: Slovenian_CI_AS

SQL Integration Service ☒

SSIS Server name: MATEJHPWKS2 Ver. 12.0

Refresh

OK Cancel

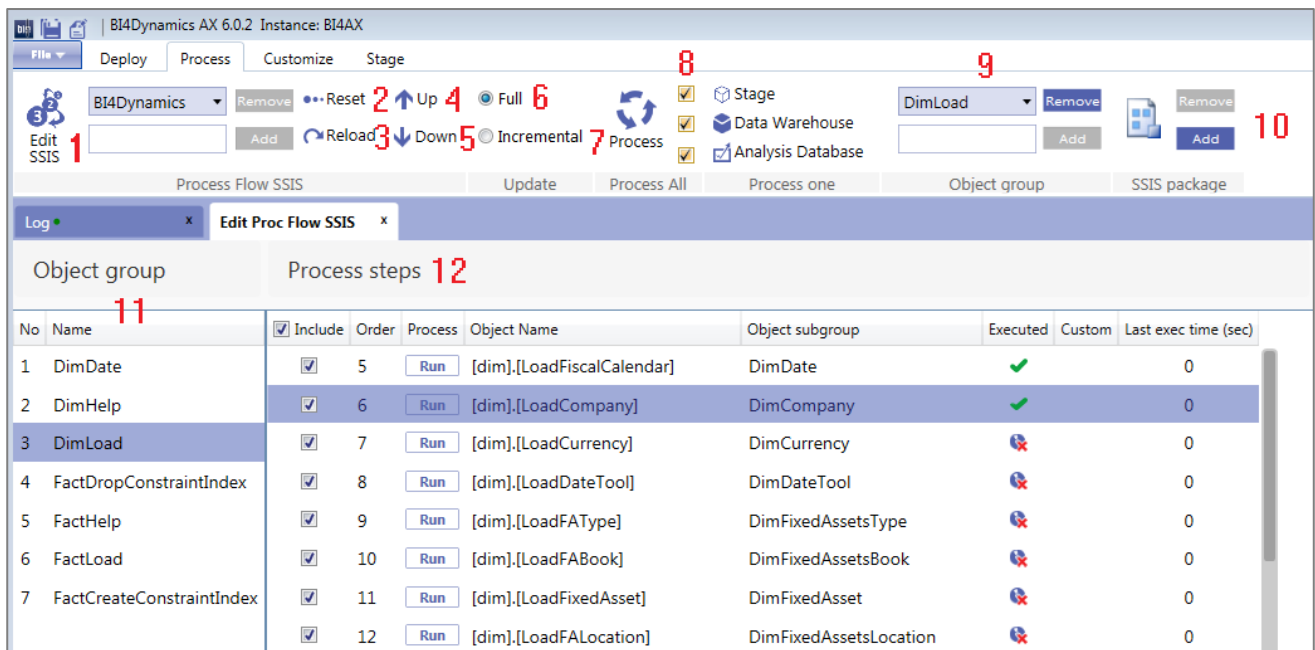
SSIS

Program Files (x86) ▶ BI4Dynamics AX ▶ BI4AX ▶ 0 Setup ▶ SSIS ▶		
th ▼	Burn	New folder
Name	Date modified	Type
BI4Dynamics	03/04/2017 09:44	File folder
Custom	03/04/2017 09:30	File folder

BI4Dynamics folder contains up to 21 encrypted, non-editable SSIS packages for BI4Dynamics troubleshooting. Please contact support@bi4dynamics.com if errors occur on processing using SSIS option.

3 EDITING SSIS PROCESS FLOW

With BI4Dynamics version 6, you will have the ability to edit SSIS process flow.



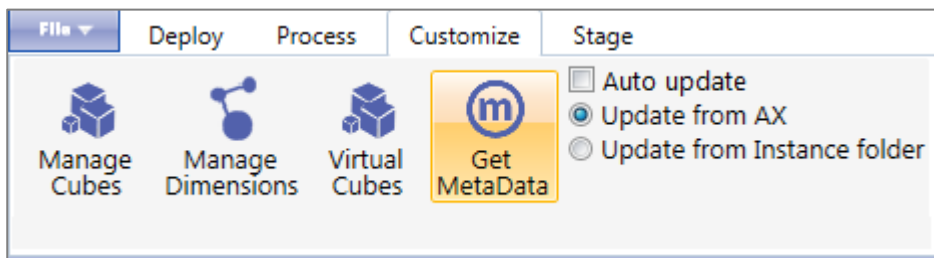
1. Click Edit SSIS on Process tab to enter the process flow editing window
2. Reset Process flow to its initial state
3. Reload the process flow to include manual script from folders 2 – 5.
4. Move selected stored procedure up on the list of Process Steps
5. Move selected stored procedure down on the list of Process Steps
6. Full processing option
7. Incremental processing option – only newly posted entries will be processed
8. Choose which part of BI4Dynamics solution (Stage, Data Warehouse, Analysis Database) will get processed when pressing Process button
9. Add or remove Object group from Object group list
10. Add or remove custom SSIS Package from Object group
11. Object group list
12. Process steps – List of procedures in each individual Object group which will be ran on Process.

Please follow [BI4Dynamics YouTube Channel](#) for more detailed instruction.

4 MANAGING CUBES AND DIMENSIONS

On Customize tab, please click Get MetaData and make sure the Update from AX option is chosen when first getting the MetaData.

Without Metadata, Manage Cube or Manage Dimension features **will not work**.

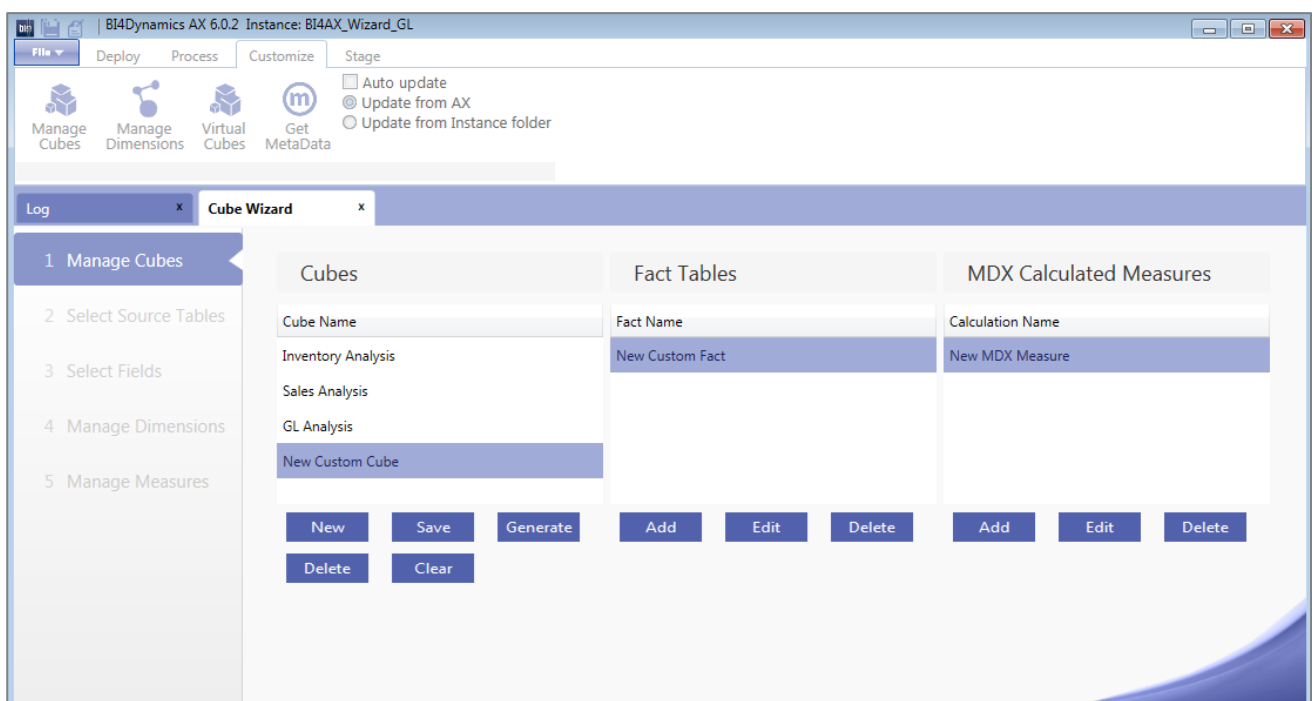


Please follow [BI4Dynamics YouTube Channel](#) for more details about managing MetaData and its troubleshooting.

4.1 Manage Cubes

After MetaData were successfully imported, click Manage Cubes. A new Cube Wizard window will open. With this new and unique feature, you will have the ability to add facts to existing cubes, create a new cube altogether or create a new MDX measure within the existing or new fact.

Detailed instructions on how to manage cubes can be found on [BI4Dynamics YouTube Channel](#).



Cubes

1. New – Create New cube
2. Save – Save the progress when creating a new cube
3. Generate – Generate scripts and save to folders 1 through 5
4. Delete – Delete newly created cube (standard cubes cannot be deleted)
5. Clear – Clear(Delete) the generated scripts from folders 1 through 5

Fact Tables

1. Add – Add a New Custom Fact
2. Edit – Edit a custom fact (standard facts cannot be edited)
3. Delete – Delete a custom fact (standard facts cannot be deleted)

MDX Calculated Measures

1. Add – Add new MDX Calculated Measure
2. Edit – Edit existing MDX Calculated Measure
3. Delete - Delete MDX Calculated Measure

4.2 How to Manage Cubes

Upon clicking Add in a Fact Tables section a new window will open. The newly created fact can be configured through series of different steps.

The screenshot shows the 'Cube Wizard' window at the '2. Select Source Tables' step. The interface includes a sidebar with steps 1 through 5. The main area is divided into several sections:

- Fact Name:** Retail (1)
- AX Tables:** A list of tables including 'Retail Trans' (2), 'Retail Transaction Sales Trans', 'Retail Transaction Service Profile', 'Retail Transaction Table' (3), 'Retail Transaction Table Ex5', 'Retail Transaction Tax Trans', and 'Retail Transaction Tender Declaration Trans'.
- Selected Tables:** A list containing 'RETAILTRANSACTIONSALSTRANS' (5) and 'CUSTTABLE'.
- Table Relations:** A table with 'Related Table' (Retail Transaction Sales Trans) (8).
- Relation Conditions:** A table with 'Column' (Account Num) and 'Related Column' (cust Account) (11).
- Buttons:** 'Add Table' (4), 'Show Related Tables' (6), 'Remove Table' (7), 'Add Relation' (9), 'Remove Relation' (10), 'Add Condition' (12), and 'Remove Condition' (13).
- Footer:** 'Total number of tables: 4712' and navigation buttons 'Back', 'Cancel', and 'Next'.

1. Choose the name of the new fact
2. Search for the table on which the new fact will be based upon
3. Click the table
4. Add the selected table to Selected Tables Column
5. See which tables were selected

6. Click Show related Tables to show related tables in the AX Tables column
7. Remove the selected table
8. See which table is related to the selected table in Selected Table column
9. Add a new Relation
10. Remove Relation (at least one relation must exists between the tables)
11. See the Relation condition (between which two columns is the relation made)
12. Add a new Condition
13. Remove Condition (at least one condition must exists between the columns)

When all the tables are selected and all the relation and conditions are defined – click **Next**. At next step different fields from selected tables can be selected.

1. See which tables were selected in the previous step
2. Search for fields in those tables
3. Check Use to select specific fields
4. Choose whether selected field would act as an Dimension or Measure within the new fact (this is already automatically defined for you, but can be changed)

When everything is set up – click **Next**.

Cube Wizard x

1 Manage Cubes
2 Select Source Tables
3 Select Fields
4 **Manage Dimensions**
5 Manage Measures

1 From Field From Enum From Related Table Custom

Available Dimensions

Table Name	Field Name	Dimension Name	Dimension Name	Source
Cust Table	CommissionGroup	Commission Group 2	Account Number 4	Field

Select **3** Deselect **5**

Total selected dimensions: 1

Back Cancel Next

1. Previously selected dimension will show up under different tabs (From Field, From Enum, From Related Table), depending on the source and type of the field.
In From Related Table tab, all dimensions (fields) from related tables can be chosen, even if the field was not chosen in the previous steps.
2. Choose and rename(if necessary) the dimension
3. Click Select to bring the dimension from Available to Selected Dimensions column
4. See the list of Selected Dimensions
5. Click Deselect to deselect previously selected dimension

Custom Dimension can be created under Custom Tab. Please explore our [BI4Dynamics YouTube Channel](#) for detailed instructions on custom dimensions.

When you have set up all the dimensions – please click **Next**.

Cube Wizard x

1 Manage Cubes
2 Select Source Tables
3 Select Fields
4 Manage Dimensions
5 **Manage Measures**

Base Measures **1**

Table Name	Field Name	Name	Operation	Format	Visible	Opposite Sign	Display Folder	MDX
Retail Transacti	disc Amount	Discount Amount	SUM	#,0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Extend
Retail Transacti	cost Amount	Cost Amount	SUM	#,0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Extend

Extended Measures **2**

Base Measure	Operation
Discount Amount	YTD
Cost Amount	POP

Custom Measures **3**

Name	Operation	Format	Visible	Custom SQL Expression	Display Folder	MDX
New Custom Measure	SUM	#,0.00	<input checked="" type="checkbox"/>			Extend

Add Remove

Back Cancel Next

1. See selected measures (Step 3) and edit them if necessary. Each measure can be renamed, operate as SUM, MIN or MAX function, be in different formats, be visible or not(if used as base for extended or custom measure), be shown with Opposite Sign(+/-), can be assigned to different display folders or be extended
2. Extended Measures functionality can extend base measures to perform as Year-to-Date, Period-over-Period, Year-over-Year, Last Periods or Rolling measure.
3. Custom measures can be created using Structured Query Language (SQL) and added to BI4Dynamics Data Warehouse

When all measures are set up – please click **Next**.

You have now create a new cube or a new fact on the existing cube. Please click **Generate** to generate scripts and **save** them to folders 1 through 5.

The screenshot displays the BI4Dynamics AX Customization Wizard interface. It features two main sections: 'Cubes' and 'Fact Tables'. The 'Cubes' section has a list with 'Cube Name' as the header, containing 'FA Analysis', 'GL Analysis', and 'Retail Cube' (which is highlighted in blue). Below this list are buttons for 'New', 'Save', 'Generate', 'Delete', and 'Clear'. The 'Fact Tables' section has a list with 'Fact Name' as the header, containing 'Retail' (highlighted in blue). Below this list are buttons for 'Add', 'Edit', and 'Delete'. On the right side, a notification box titled 'Generation finished' with a close button (x) contains the following text: 'Description: Cube Retail Cube has been saved to Wizard folder! SQL Scripts have been successfully generated!'.

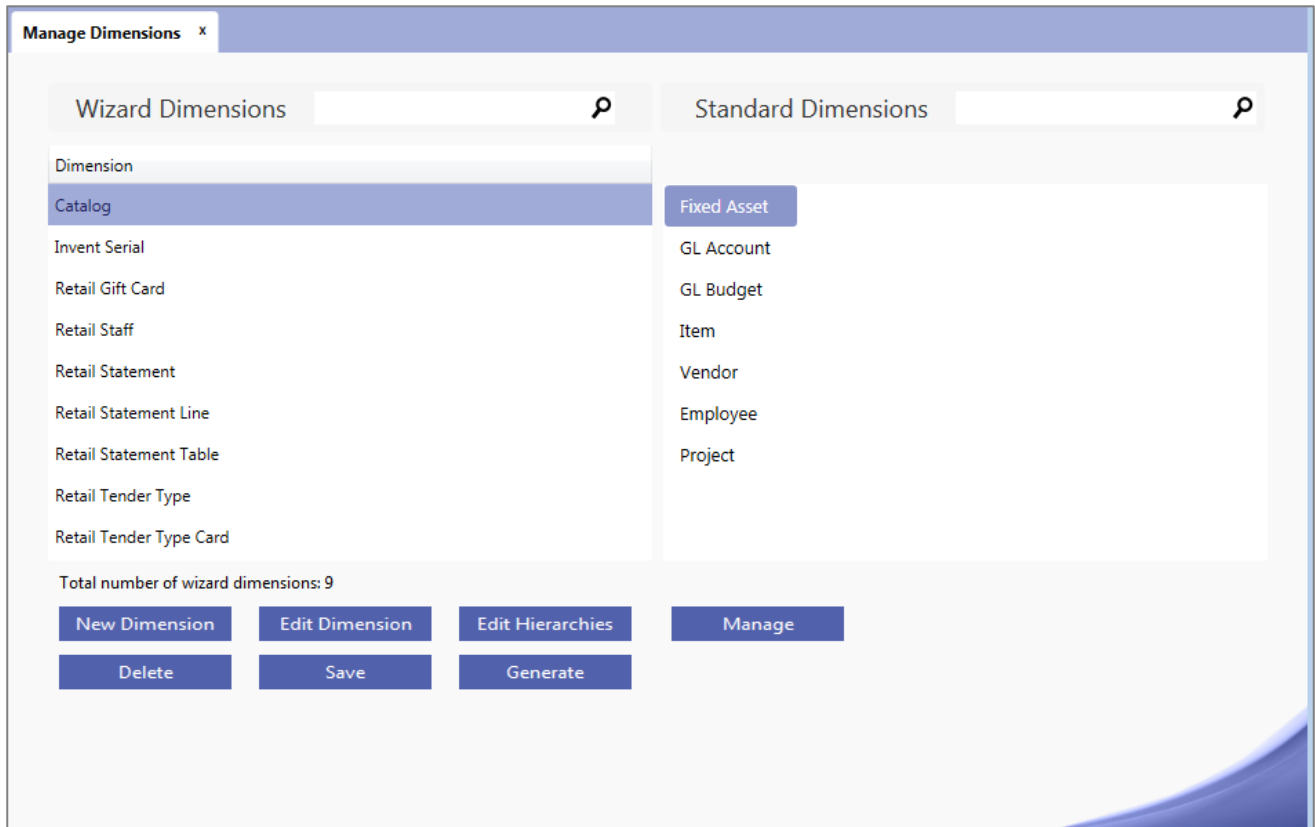
Further and detailed instructions on how to manage cubes can be found on [BI4Dynamics YouTube Channel](#).

4.3 Manage Dimensions

After MetaData were successfully imported, click Manage Dimensions. A new Manage Dimensions window will open.

With this new and unique feature, you will have the ability to add new dimensions or edit existing standard or cube wizard-created dimensions.

Detailed instructions on how to manage dimensions can be found on [BI4Dynamics YouTube Channel](#).



WIZARD DIMENSION

1. New Dimension – Create a new dimension
2. Edit Dimension – Edit existing dimension
3. Edit Hierarchies – Create, Edit or Delete hierarchies on selected dimension
4. Delete – Delete Dimension
6. Save - Save the progress when creating or editing a dimension
5. Generate – Generate scripts and save to folders 3 and 5

STANDARD DIMENSIONS

1. Manage – Transfer the Standard Dimension on the Wizard Dimension list to edit it

4.4 How to Manage Dimensions

Upon clicking Edit in the Wizard Dimensions section a new window will open. The newly created or existing Dimensions can be configured through series of different steps.

Manage Dimensions x

Dimension Name: Vendor 1

AX Tables 2

Vend RFQ Trans

Vend Settlement

Vend Settlement Extension TH

Vend Settlement Tax1099

Vend State Tax ID

Vend Table 3

Vend Total Price Tolerance

Vend Trans

Vend Trans Cash Disc

Vend Trans EP Remit_BR

Vend Trans Open

Selected Tables

VENDTABLE

DIRPARTYLOCATION

LOGISTICSLOCATION

VENDGROUP 5

MARKUPGROUP

INVENTBUYERGROUP

PRICEDISCGROUP

SMMBUSRELSEGMENTGROUP

SMMBUSRELSUBSEGMENTGROUP

CURRENCY

PAYMTERM

Table Relations

Related Table

Vend Table 8

Relation Conditions

Column

Related Column

Vend Group

Vend Group 11

Add Table 4

Show Related Tables 6

Remove Table 7

Add Relation 9

Remove Relation 10

Add Condition 12

Remove Condition 13

Total number of tables: 4712

Back Cancel Next

1. Choose/Change the Dimension name
2. Search for the table on which the new dimension will be based upon
3. Click the table
4. Add the selected table to Selected Tables Column
5. See which tables were selected
6. Click Show related Tables to show related tables in the AX Tables column
7. Remove the selected table
8. See which table is related to the selected table in Selected Table column
9. Add a new Relation
10. Remove Relation (at least one relation must exists between the tables)
11. See the Relation condition (between which two columns is the relation made)
12. Add a new Condition
13. Remove Condition (at least one condition must exists between the columns)

When all the tables are selected and all the relation and conditions are defined – click **Next**. At next step different fields from selected tables can be selected

1. See which tables were selected in the previous step
2. Search for fields in those tables
3. Check DW to select it and add it to Data Warehouse
4. Check Cube to select it and add it to Analysis Database
5. Modify the field with Custom SQL field Expression
6. When everything is set up – click **Next**.

1. Search for selected attributes
2. See the available Custom Attributes
3. Select Visible in Cube to make the attribute visible in Analysis Database
4. Add Custom Attributes
5. Remove Attribute
6. Modify the attribute with Custom SQL field Expression
7. Change the attribute type

Detailed instructions on how to manage dimensions can be found on [BI4Dynamics YouTube Channel](#).