

Dimension Cleanup Audit Template

A four-step worksheet to audit existing dimensions, map them to reports, set governance, and correct historical data.

Use this template whether you are starting fresh or cleaning up an existing setup. Work through the four steps in order. The order matters: if you try to correct historical data before fixing the process that caused it, you will be cleaning the same data again next quarter.

Step 1. Audit what exists

List every dimension. For each, note its type, owner, the count of values currently in use, and which reports actually consume it. If you cannot name a report, flag it for retirement in step 2.

Dimension code	Type (Global / Shortcut)	Owner	# of values in use	Used on which reports?	Action (Keep / Retire / Fix)

Step 2. Map dimensions to reports

For every dimension still on the list, name the specific report or dashboard that consumes it. If no report uses it, retire the dimension. If a report needs a dimension that does not exist yet, that is a separate creation request, run it through the Dimension Design Checklist.

Dimension	Report or dashboard	Verdict (Keep / Retire / Investigate)

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Step 3. Set defaults and rules

Apply Code Mandatory, Same Code, and combination rules. This is where you stop the bleeding so no more bad data gets in. See the Default Dimension Rules Quick Reference for which rule applies in which scenario.

Dimension	Master record	Rule applied	Date set

Combinations to block or limit:

Dimension A	Dimension B	Rule (Block / Limit)

Step 4. Correct historical data

Now use the Dimension Correction tool to fix posted entries. Do not reverse and repost. Every correction should follow Draft, Validate, Run. Log each batch below for audit traceability.

Batch ID	Description	Dimension corrected	# entries	Run date

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Issues log

Capture issues you find during the audit that do not fit neatly in the steps above. Assign an owner to each.

#	Issue (one per row)	Action plan / who owns it
1		
2		
3		
4		
5		
6		
7		
8		

Sign-off

Step	Completed by	Date
Step 1: Audit complete		
Step 2: Reports mapped		
Step 3: Defaults applied		
Step 4: Historical corrections complete		
Finance sign-off		