Dimension Design Checklist

Run every proposed dimension through this list before you create it in Business Central.

Most dimension problems are design problems. Once a dimension is in place and posted against, removing it is painful. So, the most efficient time to catch a bad dimension is before you ever create it. Use this checklist for every new dimension request, whether it comes from finance, operations, or leadership.

The four questions

Run every proposed dimension through these four questions. If you cannot answer all four with confidence, do not create the dimension.

#	The question	Red flag if you hear...
1	What specific report does this dimension enable?	"It would be nice to have for flexibility." If nobody can name a real report, you do not need it.
2	Who will tag this consistently, on every transaction?	"Everyone will." That usually means nobody owns it. Name a person.
3	Can this data live somewhere else (customer, item, vendor, project)?	"It is on the customer card too, but we want it on the transaction." That is duplication, not a dimension.
4	Is the reporting value worth the tagging overhead on every transaction?	"We will only filter on it once a quarter." That is a Power BI question, not a dimension.

Pre-creation checklist

Before you create the dimension, work through every box below. Add notes in the right column for the design record.

	Item	Notes
Purpose		
☐	The dimension answers a specific reporting question that leadership has asked for.	
☐	At least one named report, dashboard, or analysis view will use this dimension.	
☐	The reporting need is recurring, not a one-time analysis.	
☐	The dimension does not duplicate data already captured on a master record (customer, vendor, item, project, fixed asset).	
Ownership and consistency		

	Item	Notes
☐	A specific person or role owns the values list and the rules for this dimension.	
☐	There is a documented decision tree for which value applies in ambiguous cases.	
☐	The list of values is finite, finite enough that a user can choose from a dropdown without guessing.	
☐	Codes follow a consistent naming convention (length, format, no spaces, predictable abbreviations like FIN, OPS, MKT. If a hierarchy of dimension values will be used, use numerical codes).	
Structure		
☐	Decision made on Global vs. Shortcut placement, with a written reason.	
☐	If Global, the dimension appears on every P&L or balance sheet you produce.	
☐	Hierarchy planned (Standard, Heading, Total) so roll-up reporting works.	
☐	Codes are short and consistent across all values in the dimension.	
Governance		
☐	Default dimension behavior decided per master record type (Code Mandatory, Same Code, No Code, Code Optional).	
☐	Combinations rules considered: are there pairings that should be blocked or limited?	
☐	Posting rules tested in a sandbox before turning on Code Mandatory in production.	
☐	Change control plan in place: who can add new values, who approves, how often is the list reviewed.	
Reporting and review		
☐	A test transaction confirms the dimension flows through to the report or dashboard.	
☐	A blank-dimension column or filter is configured in the financial report so missing tags are visible.	
☐	A review cadence is set (quarterly recommended) to retire unused dimensions and values.	
☐	Documentation is stored where finance and IT can both find it.	

Sign-off

This checklist becomes the design record for the dimension. Keep it with your finance system documentation.

Field	Owner	Date approved
Dimension code		
Dimension name		
Global or shortcut		
Owner (data quality)		
Approved by (finance)		