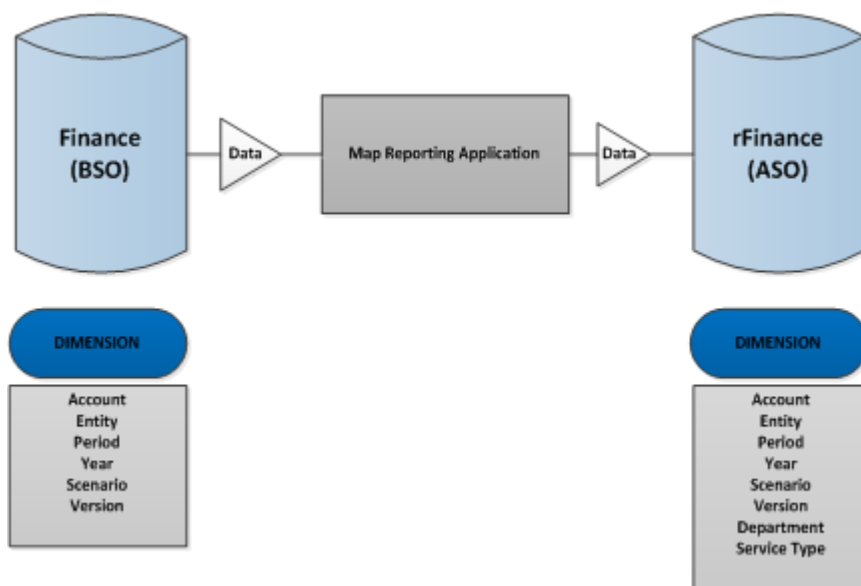


# Map Smart List to Dimension

As you all notice PBCS does not yet offer the possibility to create attribute dimensions. One of the solutions to get around this is to choose to map a smart list to a dimension in the map reporting module. Follow the steps below to configure your mapping.

Let's assume that you already have 2 plan types, one BSO and one ASO. In the example below, my plan type names are **Finance** for the BSO and **rFinance** for the ASO. In the project where I implemented this solution, I only needed 2 different attributes (**Department** and **Service type**) and I didn't need any customized dimensions.



- First you need to create the ASO dimensions representing the desired attributes. In my example I have two different attributes: **Department** and **Service Type**. On each of these dimensions create the members representing the value of your attribute. Please note that the members' name **must** match the value of the smart list consequently, they need to follow the naming convention of the smart list (no spaces or special characters). You will also notice that for each of the dimensions I have created a default member (No\_\*\*\*), I will explain why I

did this a bit later on in the post.

Department	Service Type
Total_Department	Total_ServiceType
Finance	Janitorial
Human_Resources	FOM
Sales_and_Marketing	Grounds
Safety	Staffing_Services
Legal	Nuclear
Operations	Rental_Car
Executive	No_ServiceType
Information_Technology	
Internal_Audit_and_Risk_Management	
No_Department	

- On the second step we will create the smart list. To do that click on Administration -> Manage -> Smart lists. Then create the new smart lists by clicking on add.



Administration	Help
Manage	Forms and Ad Hoc Grids
Application	Menus
Approvals	Smart Lists
Map Reporting Application	Task Lists
Data Load Settings	Variables
Import and Export	Tablet Access
	Business Rule Security

For now just create the smart lists, we will add value in other steps.

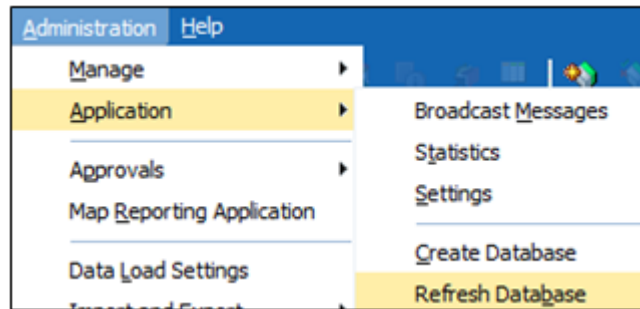
Smart Lists
sl_Dept
sl_ServiceType

- Now, we will create the BSO members linked to the smart list. Go to your BSO outline and on the account dimension create 4 members' names, **Department Property**, **Department Property Input**, **Service Type Property** and **Service Type Property Input**. Link these members to the

Department Property Input
Department Property
Service Type Property Input
Service Type Property

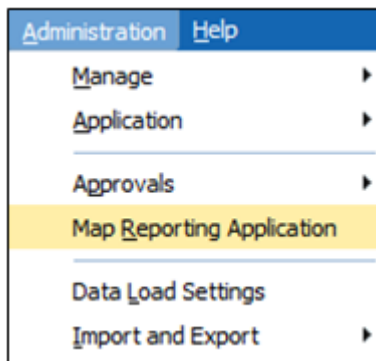
correct smart list.

- Once this step is finished go to refresh the app by clicking on Administration -> Application -> Refresh Database.



Database.

- Now that all members and smart lists are created, let's create the map reporting application. To do that click on Administration -> Map Reporting Application then click on add.



On the first tab choose your source (**Finance**) and reporting (**rFinance**) application, and don't forget to add a name to the map reporting.

On the second tab for the department and service type row choose the Smart List to Dimension mapping type, and then choose the appropriate smart list. On the member section choose **Department Property** and **Service Type Property** members and click on save.

Mapping Type	Dimension / Smart List Name	Member Selection	Dimension Name
Dimension to Dimension	Account	ILv0Descendants(Finance Accounts)	Account
Smart List to Dimension	sl_Dept	Department Property	Department
Dimension to Dimension	Entity	ILv0Descendants(Entity)	Entity
Dimension to Dimension	Period	ILv0Descendants(YearTotal)	Period
Dimension to Dimension	Scenario	ILv0Descendants(Scenario)	Scenario
Smart List to Dimension	sl_ServiceType	Service Type Property	Service Type
Dimension to Dimension	Version	ILv0Descendants(Version)	Version
Dimension to Dimension	Years	ILv0Descendants(Years)	Years

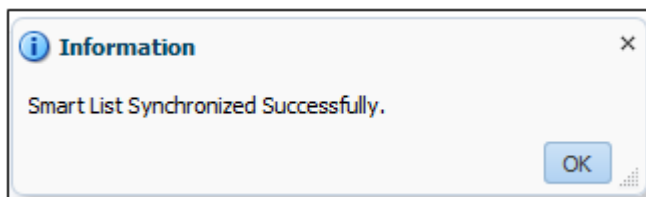
Now you should see on the screen the application mapping that you have just created. Select it and refresh it by clicking on refresh



- Now we will go back to the smart lists that we created in the second step. Since we have linked these smart lists to a dimension, we can now update them automatically. This can help you save a lot of time if you have smart lists with 50 members or more. To do this, go on the smart list screen (see step 2). Once you are there, select the smart list and click on synchronize.



Once this is done, the message below should appear.



- In order to make the smart list to dimension work, we need to assign an attribute value to every intersection for which we have data. For easy maintenance and to avoid business rules that are running for too long, we will do this by attaching a formula to a member (**Department Property** and **Service Type Property**). Go to your outline and edit these members by making them dynamic and by adding the formula that you see in the screen shot below (this formula might need to be updated depending on the name and number of dimensions that you have in your application). You will see in the formula that I'm defaulting the value of the attribute to No\_Department, this is because you can't leave any intersection #missing it will lead the map reporting to an error.

```

Plan Type Default
Data Storage Dynamic Calc
Solve Order 0
Enter Member Formula
1 If ("Department Property Input"->"FY10"->"BegBalance"->"No_Scenario"->"No_Version" + 0 == 0)
2 "Department Property"=[S1_Dept.No_Department];
3 Else
4 "Department Property Input"->"FY10"->"BegBalance"->"No_Scenario"->"No_Version";
5 EndIf

```

- The final step is to create the form where the user can set up the attribute of their choice for every entity. Go to the form panel to create your form, in the POV section put the member that you put in the above formula. In the row put the level 0 entity and in the column put the member **Department Property Input** and **Service Type Property Input**.

You can now push your data using the previous map reporting application.

**Pro:** This solution is very easy to maintain for the admin, and if needed you can also let a user play with the attributes.

**Con:** If you have too many attributes, this can make the size of the application get too big and consequently slower.