

# How-To: Assigning Dimension Types and Standard Members



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Updated 1 month ago

Leverage **Dimension Types** and **Standard Members** to unlock further capabilities with your data models.

## Video

Check out a video of this article's content.

## Why use this feature?

Assign Dimension Types and Standard Members in your data models to add context and more efficiently leverage exciting new features. By implementing Dimension Types and Standard Members, you can unlock further capabilities such as FX Functions, Insights, Template Studio, Vena Copilot and more.

Dimension Types and Standard Members integrate a Vena standard definition for members and dimensions in your data model. For example, you might name your Net Income member *NI*, Revenue member *Sales* or Account dimension *GL Accounts*. We continue to offer this flexibility in naming conventions and now, with this additional layer of standardization in our product, we can offer exciting new features at scale with minimal model configuration from customers.

Using Dimension Types and Standard Members ensures that regardless of whether your Income Statement member is called "Income Statement" or "IS" if assigned the Standard Member Income Statement, Vena understands the purpose of that member and can seamlessly integrate your data model when expanding your solution to Vena Insights, FX Functions etc.

## Dimension Types that you can use

This is the current list of available Dimension Types that can be assigned. Additional Dimension Types will become available as we explore additional use cases.

Dimension Type	Definition	Related Dimension Name Examples
Account	A dimension whose members represent a chart of accounts for financial reporting purposes.	Account, Accounts, GL Account
Entity	A dimension whose members represent organizational information, such as subsidiaries.	Entity, Company, Entities, Legal Entity, Organization
Department	A dimension whose members represent organizational functions.	Department, Departments
Year	A dimension whose members represent time in years.	Year, Years, Fiscal Year
Month	A dimension whose members represent time periods, such as quarters, halves, months.	Period, Periods, Month
Scenario	A dimension whose members represent planning or strategic analysis information - a categorization of a value.	Scenario, Scenarios
Currency	A dimension whose members represent currency information.	Currency, Currencies
Measure	A dimension whose members represent the defining characteristic of an intersection - value, comment, adjustment.	Measure, Measures
Custom	A dimension whose members does not fit an existing Vena Dimension Type and is considered "custom".	Employee, Data Source, Asset, Class, Item, Subsidiary, Category
Geography	A dimension whose members represent geographic information.	Location, Region, Geography, State, Branch
Project	A dimension whose members represent project identification information.	Project, Project Type, Project Code
Customer	A dimension whose members represent customer or contact information.	Customer, Customer Type, Opportunity
Product	A dimension whose members represent product information.	Product, Product Line, Product Family, Product Category
Vendor	A dimension whose members represent vendor or contact information.	Vendor, Vendors

## Standard Members that you can use

This is the current list of available Standard Members that can be assigned for each Dimension Type. Additional Standard Members may become available as we explore additional use cases.

The list is comprised of common financial members that are most relevant for each Dimension Type. These are expected to be very common if you are using Vena for financial planning and reporting.

Dimension Type	Standard Members
Account	Accounts Payable Accounts Receivable Assets Balance Sheet Benefits Cash Costs Of Goods Sold Current Assets Current Liabilities Deferred Revenue EBIT Equity Fixed Assets Gross Margin Headcount Liabilities Long Term Debt Long Term Liabilities Net Income Non-Current Assets Operating Expenses Other Accounts Prepaid Expenses Revenue Retained Earnings Salaries Undefined
Entity	All Entities Undefined
Department	All Departments Undefined
Year	All Years 2021

	2022 2023 2024 2025 2026 2027 2028 Undefined
Month	YTDs QTDs Full Year Opening Balance January February March April May June July August September October November December Q1 Q2 Q3 Q4 H1 H2 Undefined
Scenario	Actual Plan Undefined All Scenarios
Currency	Local All Reporting Currencies Undefined All Currencies
Measure	Total Value Value Undefined Other Measures
Geography	All Geographies Undefined
Project	All Projects Undefined

Customer	All Customers Undefined
Product	All Products Undefined
Vendor	All Vendors Undefined

## Before you begin



To follow the instructions in this guide, you will need at least **Modeler** access. You will also need appropriate data permissions for the data model.

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## How to

### Adding or editing a Dimension Type

1. Navigate to the **Modeler** tab.
2. Navigate to the appropriate **data model**.
3. Select the **pencil** () icon to edit your members. This opens the *Dimensions* drawer.
4. Select the **pencil** () icon next to the dimension associated with the Dimension Type you want to edit.

5. Select the **Dimension Type** you want to assign from the drop-down menu.

Dimension Name	Dimension Type	Actions
Account	Entity	
Entity	Customer	
Department	Custom	
Placeholder 1	Custom	
Placeholder 2		
Placeholder 3		
Placeholder 4		
Year		
Period		

Custom  
Department  
Scenario  
Year  
Month  
Account  
Currency  
Measure  
Geography  
Project  
Customer  
Product  
Vendor  
Custom

Done



6. Select the **checkmark** (✓) icon to confirm your selection.



7. Select **Done** to close the drawer.

## Note

After assigning Dimension Types, assign your Standard Members by following the steps below.

## Removing a Dimension Type


1. Navigate to the **Modeler** tab.
2. Navigate to the appropriate **data model**.
3. Select the **pencil** () icon to edit your members. This opens the *Dimensions* drawer.
4. Select the **pencil** () icon next to the dimension you want to edit the Dimension Type of.
5. Select **Custom** from the drop-down menu.

Account	Custom	
Entity	Custom	


6. Select the **checkmark** (✓) icon to confirm your selection.
7. Select **Done** to close the drawer.

## Assigning a Standard Member

1. Navigate to the **Modeler** tab.
2. Navigate to the appropriate **data model**.
3. Select the **pencil** icon next to the dimension you want to edit the Standard Members for. This opens the *Manage Model* drawer.

**Data Model**  / **Model Structure for 1.1 - Finance**

**Account**

 Entity

Department


Year

Period

Scenario

Currency

Measure



4. Select **Standard Members**.

### Note

Before assigning Standard Members, you must assign Dimension Types to your model. Standard Members will become available for each corresponding Dimension Type in your model.

## Manage Model: 1.1 - Finance

### **i** Assign Standard Members within your hierarchy

Assign Standard Members to unlock further capabilities. Identify the Standard Member that best represents each member in your model. Standard Members prepare your data model for FX Functions, Insights and more. [Learn about Standard Members](#)

Dimensions

**Standard Members**

### Select Dimension

Account



*Dimension types must first be assigned to a dimension to enable selection.*

#### Standard Vena Members

#### Assign Members from Model Hierarchy

Net Income

Assign Member

Gross Margin

Assign Member

Revenue

Assign Member

Cost of Goods Sold

Assign Member

Operating Expenses

Assign Member

Salaries

Assign Member

Benefits

Assign Member

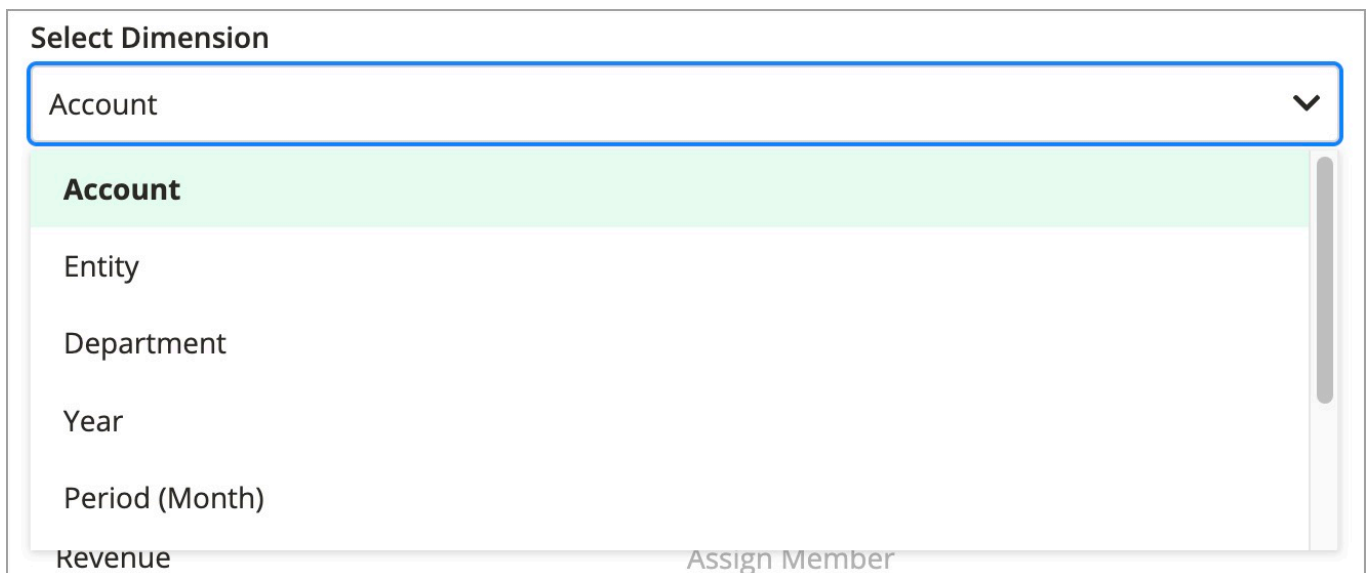
✓ Done

5. Select a **dimension** to assign Standard Members in the drop-down menu.

### Note

You will only see dimensions in this drop-down that you have assigned a Dimension Type.

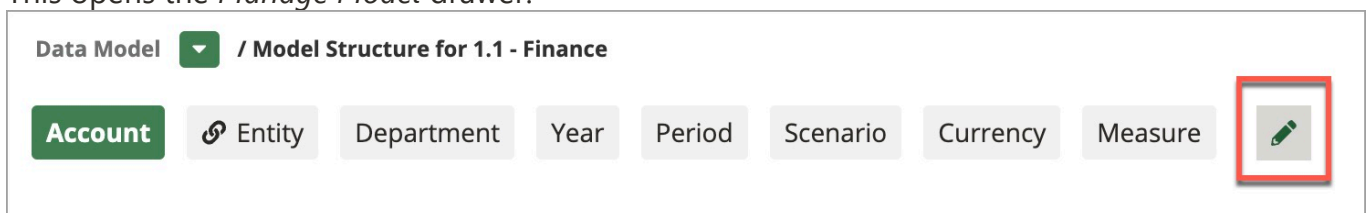




6. Select the **pencil** (✎) icon next to the Standard Vena Member and select the corresponding **member** from the drop-down menu. You can use the search function or scroll through the list to find members.
7. Select the **checkmark** (✓) icon to confirm your selection.
8. Select **Done** to close the drawer.

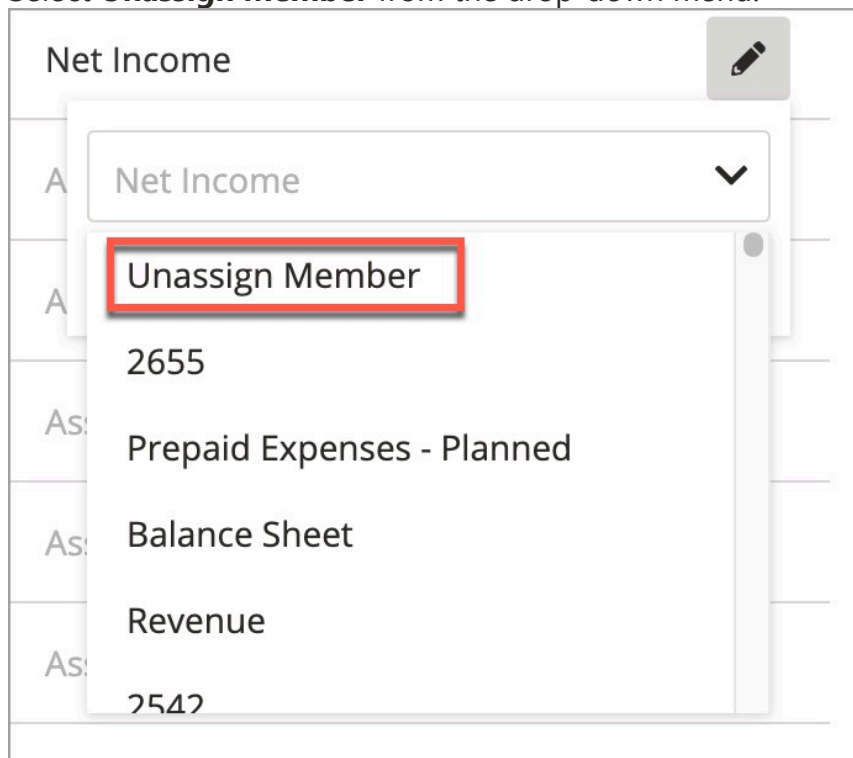
## Unassigning Standard Members

1. Navigate to the **Modeler** tab.
2. Navigate to the appropriate **data model**.
3. Select the **pencil** icon next to the dimension you want to edit the Standard Members for. This opens the *Manage Model* drawer.



4. Select the **pencil** (✎) icon next to the Standard Member you want to unassign.

5. Select **Unassign Member** from the drop-down menu.



6. Select the **checkmark** (✓) icon to confirm your selection.

7. Select **Done** to close the drawer.

## Notes & limitations

- There are 14 Dimension Types that you can use: Account, Entity, Department, Year, Period, Scenario, Measure, Currency, Custom, Geography, Project, Customer, Product and Vendor. More Dimension Types are expected to be added in the future to support expanding use cases.
- Custom is the only Dimension Type that can be tagged more than once in the same model.
- When creating new models from scratch, you can now add new dimensions with pre-defined Dimension Types from the dropdown list in addition to the standard custom dimensions.
- Dimension Types are retained in every model where a dimension is linked.
- Dimension Types must be assigned before assigning Standard Members.
- You are not required to assign all Standard Members – we highly encourage customers to assign as many as are relevant or in use in your data models.
- A member from your hierarchy can only be assigned to one Standard Member.
- Expression Σ (or Calculated) members cannot be assigned to a Standard Member.
- If a Dimension Type is unassigned or if a dimension is deleted that had Standard Members assigned, those Standard Members will also be deleted.

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