Synchronized Dimensions in FP&A

FP&A can automatically synchronize dimensions with the connected ERP system. Enabling this setting can streamline administration and make it easier for your FP&A data to accurately reflect the data source.

By the end of this course, you'll be able to explain what synchronizing dimensions does and why it's useful, discern the difference between synchronized and non-synchronized items, and how to connect an ERP to enable these options.

Objectives

- Synchronized Dimensions
- Non-synchronized Dimensions
- Manual Synchronizing

Synchronized Dimensions

You can configure dimensions to automatically pull their details from a connected source, like an Epicor ERP. To do this, navigate to the Dimensions screen.

Select the Dimension, for this example, use GL Department.

And select the member Company.

Member Properties are the fields that are retrieved into FP&A and the standard one filed for each dimension is Description. In other dimensions it could be other fields such as Account Manager on a customer. It can also include UD fields.

In general think about where you want to have the maintenance of master data, in the ERP system or in FP&A.

Go ahead and Select Synchronized.

Enabling this means that the member properties for in that dimension automatically update to match the Source system whenever a refresh occurs. In this example, it would pull from the connected Epicor system.

Select Save to submit your changes.

If you were to rename the description here while the synchronized box is enabled, then the night after when the next synchronization occurs, the changed description would be overwritten to match the corresponding name in the connected source system.

If instead, you want a different description here, you must uncheck the Synchronized box to prevent it from reverting. Then the system stops synchronizing the Member Properties details.

All of the transactional data still updates and transfers. This only controls the member properties details.

Select Next to continue to the next topic.

Non-Synchronized Dimensions

Some dimension members may not exist in your connected ERP. Identify them by the Source field in the properties. If the source is pcPortal, that means that member was created in FP&A and does not exist elsewhere.

That means levels under this member don't exist in the connected ERP, so if we create a new natural account in the ERP that should belong in one of these members, it will not automatically be added. You will manually need to move it to the right bucket in FP&A.

If you want new natural accounts added in the ERP to be automatically added to the right level in FP&A, they must first be created as category names in your ERP system. They can then be set up with mapping to synchronize from there.

The best practice is to always manage your dimensions in ERP and synchronize them into FP&A.

If you want to remove any unsynchronized items and have them replaced with the details in your EPR. Simply delete that section of hierarchy. The next time the system synchronizes the items in the ERP will automatically be recreated using the source systems data.

Manual Synchronizing

You can manually initiate a synchronization with the connected ERP. Navigate to the ERP connect page.

Select the environment to sync, and select the synchronize button.

This performs the same process as the regular nightly load. This process can take anywhere from a couple minutes to a few hours depending on your system. Sometimes if a lot of users are synchronizing at the same time there may be a queue that must process before your process begins.

As soon as you connect for the synchronization process, the system occupies a license for your connected Epicor ERP. FP&A reserves those licenses for a 2 hour period. Meaning if you synchronize 4 times within an hour, FP&A occupies 4 Epicor ERP Licenses, each for their own 2 hour period.

After the completion of the synchronize process, if your changes are not yet reflected, wait a few minutes, and check again. If they still do not appear, please contact Epicor support.

Recap

Good work completing the Synchronize Dimensions in FP&A Course.

You should now be able to explain what synchronizing Dimensions does and why it's useful, discern the difference between synchronized and non-synchronized items, and how to connect an ERP to enable these options

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