Wevo GL Analytics

White Paper

Solving the Reporting Problems Created by Organisational Change

Mergers, acquisitions, disposals and reorganisations - and how to keep reporting the business as it was

Professional Software Ltd

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1 Purpose

Every organisation of any size eventually changes shape. Divisions merge, departments move between them, a business is acquired, a subsidiary is sold, a chart of accounts is rationalised. Each of those events is planned carefully on the operational side. What is almost never planned is the effect on financial reporting, and specifically on the ability to answer, months or years later, a question that sounds simple: show me the figures as we actually reported them at the time.

This paper sets out why that question is so difficult to answer with conventional reporting tools, what it typically costs an organisation to answer it late, and how Wevo GL Analytics makes it a matter of a few minutes of preparation and effectively no ongoing cost. It is written for finance leadership rather than for technical staff, and assumes no prior knowledge of the product.

The central argument is short. Reporting figures are produced by aggregating ledger detail through a structure. Conventional systems store the result of that aggregation, so when the structure changes the old result becomes unreproducible. Wevo stores the detail and the structure separately, applying one to the other only at the moment of enquiry. That single design decision means an organisation can keep a copy of any structure it has ever used, at effectively no cost, and lay it back over its data whenever the question arrives.

2 What organisational change does to financial history

A general ledger records financial truth as flat entries: a code combination, a period, an amount. Those entries are durable and they do not change when the business reorganises. The ledger is not the problem.

The problem is that nobody manages a business by reading flat entries. Management reporting works by aggregation - cost centres roll into departments, departments into divisions, divisions into the group - and it is that structure which gives a figure its meaning. When a board looks at a divisional cost line, the number is not in the ledger anywhere. It is the sum of hundreds of ledger codes, selected and grouped by a structure that reflects how the business was organised on the day the report was produced.

Change the structure, and every figure it produced becomes unreproducible. The ledger entries survive; the thing that turned them into a report does not.

2.1 The four events that break reporting history

Reorganisation. Departments move between divisions, management responsibilities are redrawn, cost centres are re-parented. This is the most common cause and the least documented, because it is usually treated as an internal administrative change rather than a reporting event.

Acquisition. An acquired business is folded into the group structure. Its own reporting structure is normally abandoned in the process, along with the ability to report the acquired entity on the basis used during the transaction.

Merger. Two structures are combined into a third that resembles neither. Both predecessor views are lost at the same moment, usually under time pressure.

Disposal. A business or line is carved out and sold. The remaining structure is redrawn around the gap, and the disposed unit disappears from the reporting view - frequently before the transitional service and completion accounts work has finished.

A chart of accounts rationalisation belongs on the same list. It has the same effect on the account axis that a reorganisation has on the organisational axis, and it is even less likely to be recognised as a reporting event when it is scheduled.

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2.2 The questions that arrive afterwards

The cost of a lost structure is not felt on the day. It is felt when somebody asks a question that can only be answered under the structure that no longer exists. These questions are predictable in kind, even though their timing never is.

Who asks	What they ask for	Typical timing
External auditor	Prior-year comparatives on the basis originally reported, reconciled to the signed accounts	Three to nine months after the change
Acquirer or vendor	The acquired or disposed unit reported on the basis used in the transaction, for earn-out or completion accounts	One to three years, often under dispute
Regulator or tax authority	A defined period presented on the basis in force at the time, not restated	Any time, usually with a short deadline
Board or audit committee	Whether the reorganisation delivered the savings that justified it	Six to eighteen months after the change
Incoming finance leadership	A consistent multi-year trend for a part of the business that has since been reshaped	On appointment
Legal counsel	The figures as reported, for a dispute, warranty claim or investigation	Unpredictable, and rarely convenient

What these have in common is that none of them can be satisfied by a restated figure. The auditor wants what was reported, not what would be reported today. The earn-out is calculated on the contractual basis, not the current one. Restatement is the answer to a different question.

2.3 Why it is always discovered too late

A structural change is owned by the people carrying out the change. The reporting consequence lands on somebody else, later, and by the time it lands the moment at which it could have been prevented has passed by months. There is no natural point in a reorganisation project at which anybody asks whether the outgoing reporting structure should be kept, because in most systems the answer would be that keeping it is impractical anyway.

That is the specific gap this paper addresses. If preserving the outgoing structure is cheap, quick, and carries no ongoing cost, it can become a routine step in every change - taken as a precaution rather than as a considered decision, in the same way that a database backup is taken before an upgrade.

3 Why the usual answers do not work

Finance teams facing this problem generally have four options. Each of them fails in a different way, and understanding why is the clearest route to understanding what Wevo does differently.

3.1 Restore a backup

The instinctive answer is that the data was backed up, so nothing is lost. The difficulty is that a backup preserves data, and what has actually been lost is structure. Restoring a backup of the ledger recovers the same flat entries that are still available in the live system. Restoring a backup of the reporting system recovers a whole environment that then has to be stood up, licensed, secured

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and maintained by people who have moved on to other things. Neither produces a figure quickly, and the second produces a compliance liability.

3.2 Rebuild it in a spreadsheet

This is what most organisations actually do. Somebody extracts the ledger detail, obtains whatever documentation of the old structure still exists, and rebuilds the mapping by hand. It takes weeks of senior finance time, it is unauditable, and it almost never ties back exactly - which is precisely the wrong outcome to present to an auditor or to the other side of a completion accounts dispute. The work is also thrown away, so the next request starts again from nothing.

3.3 Restate everything

Restating prior periods onto the current structure produces a genuinely useful like-for-like comparison, and Wevo does this automatically. But it answers a different question. A restated figure is what the prior year would have looked like under today's structure. It is not what was reported, and it cannot be reconciled to the signed accounts or to a contractual basis of preparation.

3.4 Keep the old system running

Some groups leave a retired reporting system switched on purely so that history can be queried. This works, and it is expensive: licences, infrastructure, patching, access control and audit obligations continue for a system nobody uses. It is also fragile, because the knowledge required to operate it decays faster than the obligation to keep it.

Approach	What it actually delivers	Why it falls short
Restore a backup	The ledger detail that was never lost	Recovers data, not the structure that gave it meaning
Rebuild in a spreadsheet	An approximation, after several weeks	Unauditable, does not tie back exactly, thrown away afterwards
Restate onto today's structure	A valid like-for-like comparison	Answers a different question - not what was reported
Keep the old system running	A working historical view	Continuing licence, infrastructure, security and audit cost
Preserve the structure in Wevo	The original figures, reproduced exactly	Requires one deliberate step before the change

4 How Wevo holds structure and data apart

Wevo GL Analytics is a read-only reporting and analytics layer that sits alongside a general ledger. It receives file extracts of ledger balances and movements, summarises them through the hierarchies the business has defined, and serves the result through a browser, typically within minutes of the ledger. The ledger remains the authoritative record throughout.

The design decision that matters for this paper is where the figures are held. Wevo stores data at the lowest level of detail - the intersection of a ledger segment value and an account - and holds the hierarchies that aggregate it as separate objects. The two are brought together to produce a view. Neither is embedded in the other.

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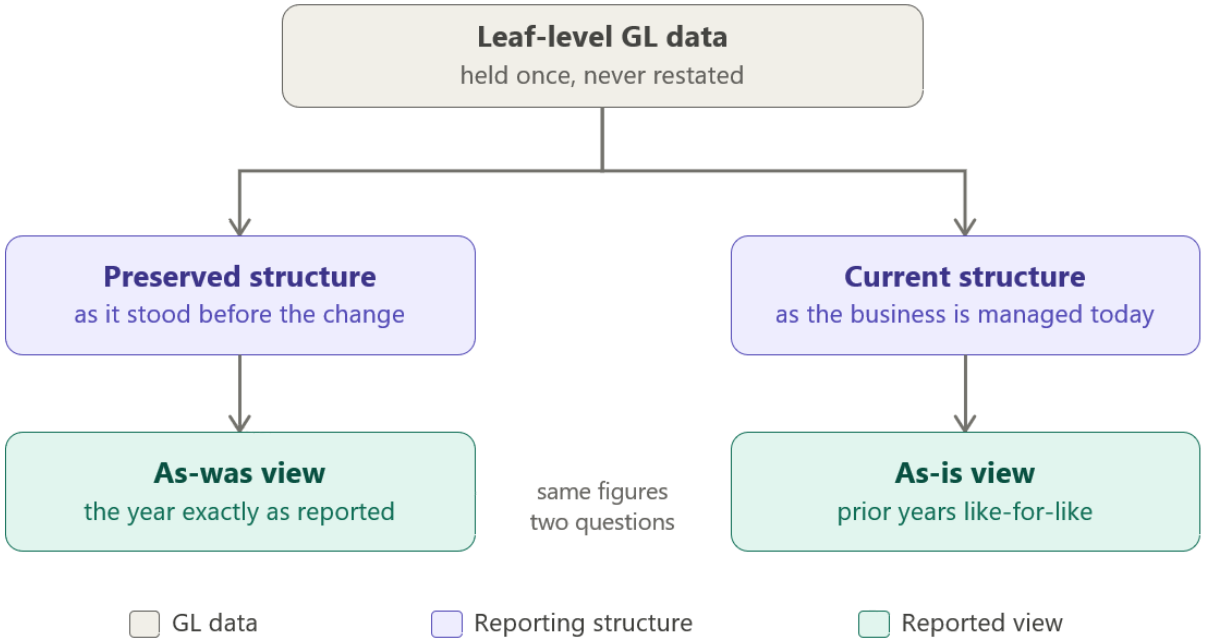


Figure 1 - Structure and data are held separately, so the same ledger detail can be read through more than one structure without being restated.

This is what makes two apparently contradictory things possible at once.

The as-is view. Prior years are read through today's structure, giving a like-for-like comparison across a reorganisation with no restatement exercise and no footnote explaining why the comparatives are not comparable. This happens automatically and requires no action from anybody.

The as-was view. A retained structure is applied to the same data, presenting a period exactly as it was originally reported. This requires that the structure was kept - which is the subject of the rest of this paper.

Because both views are produced from the same stored detail by the same aggregation logic, they reconcile to each other and to the ledger. The as-was figure is not a reconstruction or an estimate. It is the same arithmetic performed over the same numbers through a different structure.

One point of precision, since it matters to auditors: this is management reporting restatement, not statutory restatement under accounting standards. Wevo reproduces the management view faithfully; it does not and cannot perform a statutory restatement.

5 Preserving a structure before the change

Preserving a structure in Wevo is a single named operation, Preserve Structure, performed by the finance team that owns the structures. There is no separate module, no archive product and no additional licence. One click on the cube captures the whole reporting shape as it stands in production, and the result cannot afterwards be altered.

5.1 The procedure

1. Open the cube and select Preserve Structure. The tab is available on any development cube that has been summarised at least once, because the copy is taken from the production structure and there must be a production reality to preserve.

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2. Name it, and say why. Supply a name for the preserved cube and a preserve description recording the event that prompted it. The description is mandatory, and it is what makes the structure self-explanatory to somebody who finds it in three years. The hierarchy names default from the source cube and can be adjusted.
3. Press Preserve Structure. In one transaction Wevo copies both hierarchies from production with all their validated levels, nodes and links, locks them, creates the cube on the copies, and records the preserve description against it. The operation either completes in full or creates nothing.
4. Decide how to hold it. The preserved cube is created dormant, holding no data and taking no part in any build. Allocate reporting years to it if you want it immediately available to query; otherwise leave it as it is.

What the operation produces is deliberately one-way. A preserved structure cannot be amended afterwards; its hierarchies are locked and its composition is fixed, and the only field that remains editable is the preserve description itself. It can be deleted when it is no longer wanted, and deleting it removes both hierarchy copies with it. The value of that restriction is set out in section 8.

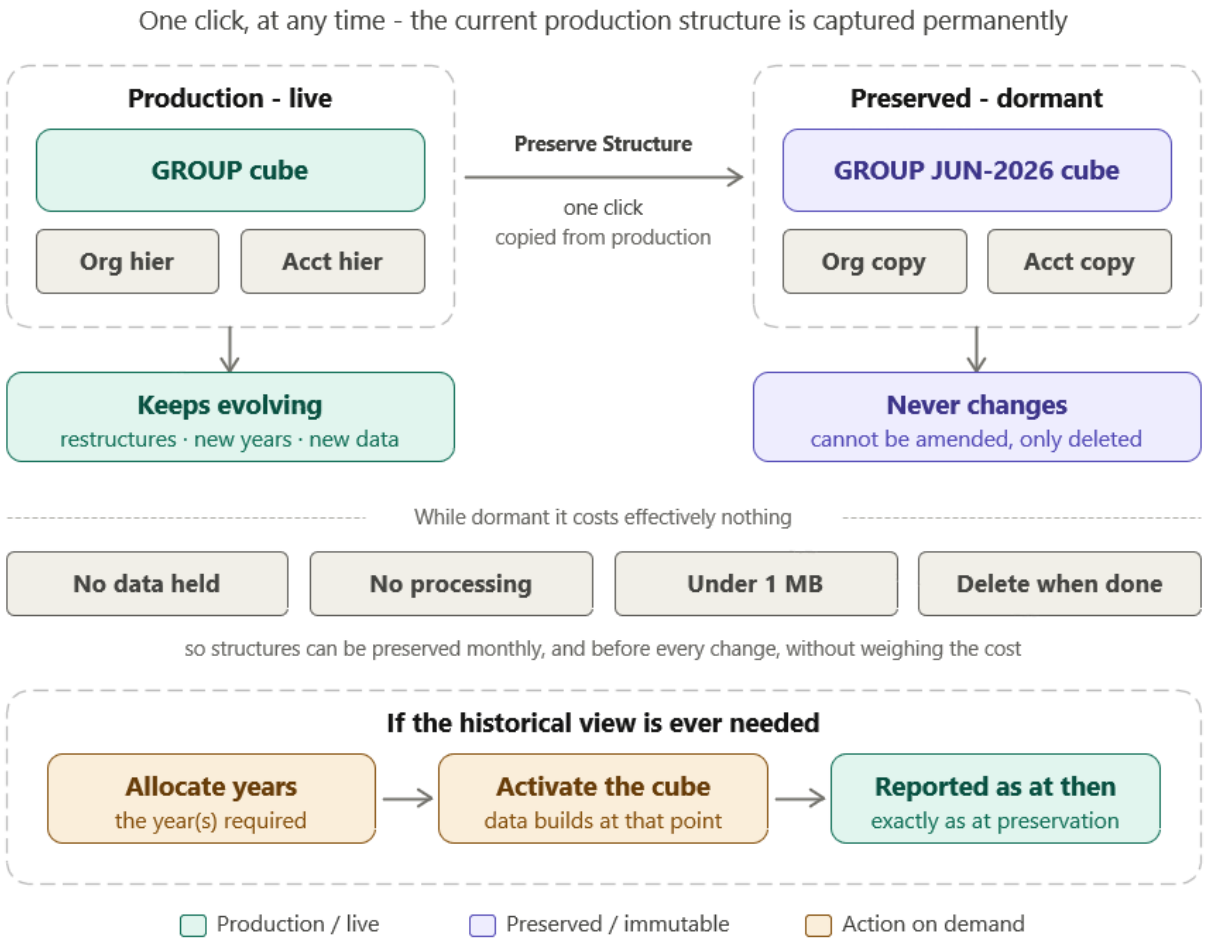


Figure 2 - Preserve Structure - one click copies the production structure into a dormant, immutable cube; the live structure carries on evolving, and years are allocated to the preserved cube only if the historical view is ever needed.

5.2 Warm or dormant

Holding the structure warm or dormant is the only judgement left in the procedure, and it is easily reversed in either direction. A structure held warm carries data and can be queried immediately. A structure held dormant is a definition rather than a dataset: it consumes no storage for summarised

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figures, takes no part in the incremental update cycle, and adds nothing to build times. Years can be allocated to it later, and the data is created on the next full build.

	Held warm	Held dormant
Years allocated	Yes, at least one (relevant)	None
Summarised data held	Yes	None
Included in builds	Yes	No
Available to query	Immediately	After years are allocated and the next full build runs
Ongoing overhead	Storage and one off full build time for the allocated years	None
Best for	A structure you expect to consult regularly, such as the last year end	A structure kept purely as a precaution
After use	Remove the years and the data is cleared down	Deactivate again and the data is cleared down

For most purposes dormant is the right default. The point of preserving a structure is that nobody knows in advance which structures will matter, and a dormant structure costs nothing to be wrong about.

5.3 Putting it back afterwards

The decision taken in step four is not permanent in either direction, and this is what completes the picture. A structure that has been activated to answer a question does not have to stay activated once the question is answered.

When the work is finished, the cube can be made inactive again, or individual reporting years can be made inactive or removed from it. In either case the summarised data associated with what has been deactivated is cleared down. The structure itself remains, promoted and intact, ready to be used again; what disappears is the data that was built to service the enquiry.

The practical effect is that a preserved structure only ever consumes anything during the period in which it is actually being used. An audit request in March can be answered in March and the storage recovered in April, leaving the structure available for the next request without carrying any cost in between. Over a working year, a group might activate two or three preserved structures out of a dozen it holds, each for a few weeks, and return all of them to dormant afterwards.

This also removes the objection that preserved structures accumulate. They do accumulate, but as definitions rather than as data, and a structure that was activated once and returned to dormant is indistinguishable in cost from one that has never been used at all.

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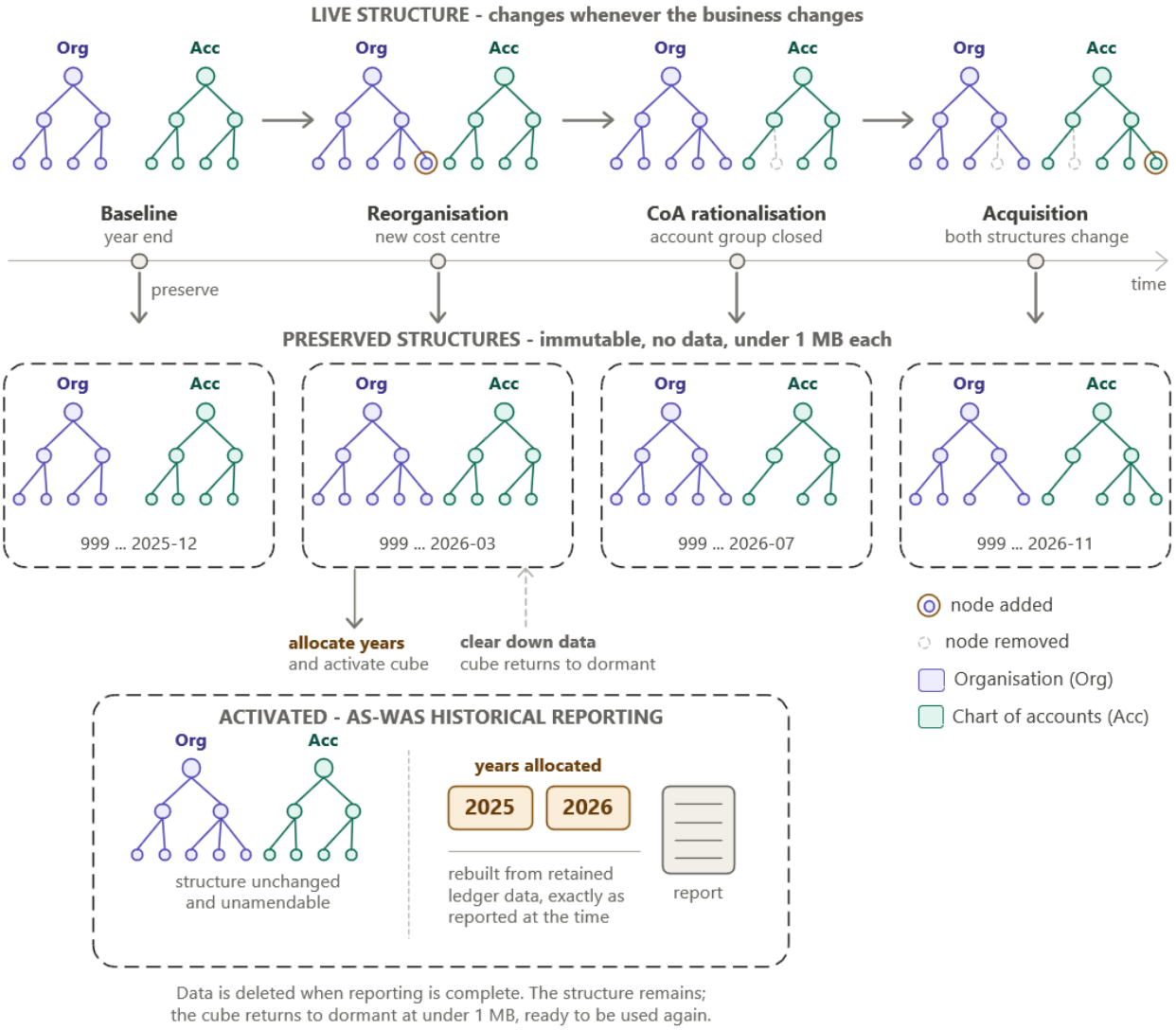


Figure 3 - The full cycle. The live structure changes as the business changes; a copy is preserved at each point; and a preserved structure is activated only when a question arrives, then cleared down again, leaving the structure intact and the storage recovered.

5.4 When to take a copy

Because the cost of holding a preserved structure is effectively nil, the discipline is simply to take one whenever the shape of the business is about to change, and on a routine cadence besides. There is no need to assess whether it will be needed.

Trigger	Why
Before any reorganisation	The most common cause of lost history, and irreversible once carried out
Before an acquisition completes, and again at completion	Preserves the group as it stood, and the acquired unit on the transaction basis
Before a disposal or carve-out	Supports completion accounts, transitional services and warranty periods
Before a chart of accounts rationalisation	The account axis breaks history in exactly the same way as the organisational axis

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Trigger	Why
At each year end	Gives an as-was view of the closed year alongside the like-for-like as-is view
Monthly or quarterly, as routine	Costs nothing, and removes the need to anticipate anything
Before any change requested for management reporting only	These are the changes nobody documents and everybody later needs

A consistent naming convention matters more than it might appear, which is why the preserve description is a mandatory field rather than an optional note. A preserved structure recorded with the date and the event that prompted it - the year end it represents, or the transaction it precedes - remains self-explanatory long after everybody involved has moved on. Record the event, not the date alone: "pre-reorganisation June 2026" tells the next person what they are looking at, where "June copy" does not. That, rather than any technical constraint, is what determines whether a preserved structure is still useful when it is finally needed.

6 Reading current data through a previous structure

A preserved structure is a working cube, not a sealed archive. Which years it reports on is a matter of configuration, and that opens a use that goes well beyond looking backwards.

Prior years allocated to a preserved structure present those years exactly as they were reported. But a current year can be allocated to it as well - and then the business is looking at live figures through the structure it used to have. The same data, aggregated two ways, side by side.

Several things become straightforward at that point, all of which are otherwise difficult.

Quantifying a reorganisation. Report the current year through both the old and the new structure. The difference between them is the effect of the restructure on the reporting view - calculated from the data rather than estimated in a paper exercise. When a board asks whether the reorganisation achieved what was claimed for it, this is the answer.

Tracking an integration. After an acquisition, the acquired business disappears into the enlarged group structure and becomes hard to see. Reported through the pre-acquisition structure, it remains visible as a distinct unit for as long as the integration lasts, without maintaining a parallel reporting process.

Monitoring an earn-out. Where consideration depends on the performance of an acquired business measured on the basis agreed at completion, that basis is exactly what the preserved structure holds. The measurement can be run each period against the contractual structure rather than reconstructed at the end of the earn-out period, when the disagreement is already under way.

Running a transition. During the months in which management is being moved from an old shape to a new one, both views can be produced from the same data for as long as they are needed, and the old one retired when the business is ready rather than when the system forces it.

None of this requires a second reporting process, a parallel extract or any duplication of data. The ledger feed is unchanged; only the structure through which it is read is different.

It is also easy to stop. When the integration is complete, the earn-out period has ended or the transition is over, the current year can be removed from the preserved structure, or the cube made inactive, and the data built to support the parallel view is cleared down. The structure stays in place for any later request; only the working data goes.

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7 Worked example - a banking group over eighteen months

The Wevo document set follows a single worked example throughout: a banking group whose general ledger, MasterGL, carries three segments - business unit, cost centre and account code. The group reports through an organisational hierarchy that starts at the Global Banking Group and breaks down through divisions, departments and sub-departments to the individual cost centres where costs are posted, paired with a management chart of accounts. The pairing is held as a cube called GROUP.

The eighteen months below are illustrative, but the sequence of events will be familiar to anyone who has run finance in an acquisitive group.



Figure 4 - Four business events over eighteen months, each preserving the reporting structure in force at the time.

7.1 January 2025 - go-live

Wevo goes live against MasterGL. Prior years already held on the ledger are summarised through the current hierarchy from day one, so the group has as-is comparatives immediately rather than waiting a year to accumulate them. As a matter of policy, the financial control team takes a copy of the opening structure and holds it dormant. Nothing is expected to come of it. It costs nothing to be wrong.

7.2 July 2025 - the acquisition

The group acquires a regional lender. Before the acquired cost centres are mapped into the group hierarchy, the financial control team copies both hierarchies, creates a cube named for the month, promotes it, and leaves it dormant. The integration then proceeds: the acquired business is absorbed into the existing divisional structure and, from the following month, is no longer separately visible in the group reporting view.

Two months later the integration committee asks how the acquired business is performing against the case that justified the price. The preserved July structure is given the current year, and from the next full build the group can report the business as it was constituted at completion, alongside the enlarged group view. The committee gets its answer from configuration rather than from a project.

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7.3 December 2025 - the year end

At close, the group takes its year end copy. The GROUP cube and its two hierarchies are copied, suffixed to identify the year they preserve, promoted, and this one is held warm rather than dormant, because the last closed year is consulted often enough to justify it. From that point the two cubes diverge: the preserved 2025 structure presents the year exactly as it stood at close, while the live GROUP cube goes on absorbing changes and summarising each new extract.

In February 2026 the group reorganises, moving two departments between divisions. The as-is view instantly presents 2025 under the new structure, giving the board a like-for-like comparison. The preserved 2025 structure continues to present the year as the auditors saw it. Neither view required a restatement exercise, and the two coexist without conflict.

7.4 June 2026 - the disposal

The group sells its leasing arm. Before the disposal is reflected in the structure, a copy is taken and held dormant. The remaining structure is then redrawn around the gap.

Eleven months later a completion accounts adjustment is disputed. The basis of preparation is the group structure as it stood immediately before disposal - which is precisely what the dormant June 2026 cube holds. Years are allocated to it, it builds, and the disputed figures are produced on the contractual basis, reconciling exactly to the ledger. The alternative, had the copy not been taken, would have been a spreadsheet reconstruction from ledger extracts and whatever structural documentation survived, presented to the other side's advisers as an approximation.

Once the dispute is settled, the cube is made inactive again and the data built to answer it is cleared down. The structure remains in place should the matter be reopened, and in the meantime it costs nothing to keep.

7.5 What was preserved, and what it answered

Preserved structure	Taken before	Question it later answered
Opening structure	Go-live	Multi-year trend for a division reshaped twice since
July 2025	The acquisition	Integration performance against the acquisition case
December 2025	The year end	Audit comparatives on the basis originally reported
June 2026	The disposal	Completion accounts on the contractual basis

The pattern is worth noting. In none of these cases did the team taking the copy know what question it would answer. In three of the four, the question came from outside the finance function entirely. The copies were taken as a precaution, not as a plan, and that is exactly why the practice works.

7.6 What it cost

Four preserved structures over eighteen months. Three held dormant, carrying no summarised data, taking no part in any build, and occupying together rather less than a single email attachment. One held warm, carrying a single closed year. The finance time involved was a few minutes for each copy at the point the change was made, and no ongoing administration at all.

Two of the dormant structures were activated during the period, used, and returned to dormant with their data cleared down. At the end of the eighteen months the group therefore held four structures

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and was carrying data for one of them - the same position it was in at the start, with three additional historical views available on request.

Set against that: one integration review, one audit request and one disputed completion accounts calculation, each answered from configuration in a matter of days rather than from a reconstruction exercise measured in weeks of senior finance time.

8 Governance, audit and control

A preserved structure is not a shadow copy sitting outside the control environment. It is an ordinary Wevo cube and it inherits everything that applies to any other.

- Creation is controlled and atomic. A preserved structure is created by a single operation that either completes in full or creates nothing, and its hierarchies are locked at the moment of creation. There is no window in which a half-built preserved structure can be mistaken for a complete one.
- Access is governed by the same security profiles. A user who cannot see a division in the live structure cannot see it in a preserved one. Preservation does not create a route around the security model.
- Changes are audit logged. The creation and year allocation of a preserved structure are recorded in the same way as any other maintenance activity, together with the user who performed them.
- It cannot be amended after creation. This is the property that distinguishes a preserved structure from a working copy. A copy that could be quietly adjusted invites the question of whether it is genuinely what was in force at the time; a structure that is locked at creation and cannot be edited afterwards answers that by construction. Only deletion is possible, and deletion is logged.
- The underlying data is unchanged. Wevo is a read-only layer over the ledger and cannot write to it. Preserving a structure alters nothing in the general ledger and nothing in the data Wevo already holds.
- Reproduction is arithmetic, not re-keying. Figures produced through a preserved structure are aggregated from the same stored detail as every other Wevo view, so they reconcile to the ledger by construction rather than by reconciliation.

For an auditor, two points matter together. The figures are aggregated from the same stored detail as every other Wevo view, so the question of whether a historical figure has been reconstructed, adjusted or interpreted does not arise. And the structure through which they are aggregated was locked at the moment it was preserved and has been incapable of alteration ever since. The arithmetic is verifiable and the basis of the arithmetic is fixed.

9 What it costs, and why that is the point

Most capabilities that address this problem are priced as archiving products, because they work by keeping copies of data. Preservation in Wevo works by keeping a definition, which is why the economics are different.

- A dormant structure holds no summarised data at all. The definition itself - the cube and its two hierarchy copies - occupies under 1 MB for an enterprise group.
- It takes no part in the incremental update cycle, so it does not slow down the reporting everybody else is using.
- The overhead is not only low but reversible. A structure activated to answer a question can be made inactive again afterwards, or have individual years removed, and the data is cleared down. Cost is incurred only while the structure is actually in use.

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- Wevo is licensed without per-seat charges and without data-volume or module surcharges, so preserving structures does not move the licence position.
- The licence includes both a development and a production instance, so structures can be prepared and rehearsed away from live processing.

The consequence is more important than the arithmetic. When preserving a structure is expensive, somebody has to decide whether this particular change is significant enough to justify it - and that decision is made by the people carrying out the change, at the moment when they are least interested in reporting consequences and least able to predict them. When preserving a structure costs under 1 MB and one click, the decision disappears. The instruction becomes: preserve the structure before any structural change, always, and work out later whether it mattered.

Removing a judgement call is what makes a practice stick. It is the same reasoning that makes a pre-upgrade database backup unremarkable rather than a matter for debate.

10 Getting started

For an organisation already running Wevo, adopting this practice takes an afternoon and no technical work.

1. Write it into the change procedure. Add a preservation step to whatever process governs hierarchy changes, so that it is triggered by the change rather than remembered by an individual.
2. Agree a naming convention. Date and reason, consistently applied. This is the single decision that determines whether preserved structures are usable years later.
3. Agree who authorises and who performs. In most organisations both belong to financial control, alongside ownership of the hierarchies themselves.
4. Set a routine cadence in addition to event-driven copies. Monthly or quarterly, held dormant.
5. Take one now. The current structure is the one you will wish you had kept, and it is available only until the next change.

For an organisation evaluating Wevo, this capability is worth testing during the evaluation rather than taking on trust. A proof of concept can demonstrate the whole cycle against the organisation's own ledger data: preserve a structure, change the live one, report the same period both ways, then return the preserved structure to dormant and watch the data clear down.

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11 Where this document sits

Document	Answers the question
Business Introduction	What is Wevo GL Analytics, and why adopt it
This white paper	How do we keep reporting the business as it was, through structural change
Implementing Multi-Level Management Reporting	How do we take our ledger and turn it into management reporting
User Manual: Hierarchy and Cube Development	How does each maintenance screen work, field by field
User Manual: Cube Drilldown Enquiry	How does each enquiry screen work, field by field

Appendix A - Glossary

Term	Meaning
As-is view	Prior years read through the current reporting structure, giving a like-for-like comparison without restatement
As-was view	A period read through the structure in force at the time, presenting it exactly as originally reported
Cube	The pairing of an organisational hierarchy with an account hierarchy for a given record type and version
Clear down	The removal of the summarised data held for a cube or for a reporting year when that cube or year is made inactive or removed
Dormant structure	A preserved cube with no reporting years allocated, holding no data and taking no part in any build
Hierarchy	A tree of nodes that aggregates ledger segment values into the groupings by which the business is managed
Leaf node	The lowest level of a hierarchy, corresponding to a real general ledger segment value
Preserved structure	A copy of the organisational and account hierarchies, and the cube pairing them, taken at a point in time and promoted to production
Promotion	The controlled step by which a hierarchy is locked and copied to production at the start of the next full build
Preserve Structure	The single operation that copies a cube's organisational and account hierarchies from production and creates a dormant cube on the copies, capturing the reporting structure of that moment permanently.
Immutable	The property of a preserved structure that it cannot be amended after creation. Its hierarchies are locked and its composition fixed; only the preserve description remains editable, and only deletion removes it.
Preserve description	The mandatory free-text field recording why a structure was preserved. It is what makes a register of preserved structures readable years after the event.

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Term	Meaning
Record type	The class of ledger entry a cube summarises, such as actuals or a budget version
Warm structure	A preserved cube with reporting years allocated, built and available to query immediately

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