

CPM Quick Reference – Glossary

Account Allocation % Grid:	Used in the FAB Tool Salary Planning model to assign employees to account keys based on % and begin and end date.
Account Allocation Hours Grid:	Used in the FAB Tool Salary Planning model to assign employees to account keys based on hours for a particular quarter or month.
Account key:	A unit (account) in the financial system used to associate financial transactions with a project, an organization unit an award or a set of activities.
Application - % in Key Planning	UI Application for users who plan staff by % in account key.
Application – Hourly Planning:	UI Application for users who plan staff by hours in quarter or hours in month.
Application Selection in UI:	Allows the user to select the UI application they wish to use, either % in Key or Hourly.
Application Layout:	Allows the user to save the application to open to frequently used grids.
Appointment Code:	Code assigned to an employee record in the HRIS system to signify if an appointment is full-time, part-time, with or without a specified term end date, "casual" occasional or irregular work hours, or various official leaves of absence. Among other things the codes signify the applicable benefit rate.
Assumptions – Variable:	Past, Current and Projected rates for Employee Work time and Employee Salary increases applied to data entry are shown in the Scenario Assumptions Report Grid. These assumptions can be overridden at the employee level in the Employee Assumptions Data Entry Grid.
Assumptions – Fixed:	Past, Current and Projected rates for Overhead, Benefits and CSC rates applied to data entry are shown in the Scenario Assumptions Report and the Division CSC Rates Grids. These assumptions impact all calculations and CANNOT be overridden.
Attributes – General:	Attributes represent a single type of information in a dimension. For example, "position" is an attribute in the "employee" dimension.
Attributes – User Defined:	Specific Account Key attributes are available to users to define in the UI on a key by key basis.
Available Work Hours:	This is used as a basis for calculating employee salary costs on keys. Typical years contain 260-261 work days. Multiplied by 8 hours per day this translates to 2080 to 2088 total work hours. Multiplied by 85 % work time, an average full time employee's available work hours would be 1768 to 1776. See also Work time %.
Benefit Rate – Casual:	The rate is applied to casual salary dollars. The casual benefit rate applies to casual employees who do not receive the full benefit package.

Benefit Rate - Full:	A rate applied to non-casual staff salary dollars. The employee benefit rate includes direct charges for non-work time of vacation, sick leave, holidays and other paid leave, as well as standard staff benefits.
BI – Business Intelligence (Reports):	IBM® Cognos report development and delivery tool
Budget Type:	A dimension in the TM1 cubes and data entry grids that allows for planning and reporting by New Funds, Uncommitted Carryover, Committed Carryover, Budget Transfers, (Expected Funds for planning purposes)
Computer Service Center (CSC):	The CSC system, established within the framework of a "Specialized Service Center" in OMB Circular A-122, distributes division scientific computing support costs to a division's program in an equitable, efficient way. CSC rates vary by division and program and some programs have no rate. Rates are shown in the Division CSC Rates Report Grid. Typically the applied CSC rate is based on the employee's Home Division or Program and applied to ANY account to which the employee charges hours.
CPM:	Corporate Performance Management (CPM) Data Warehouse data base which sources data nightly from IFAS and HRIS / iVantage, also refers to staffing and planning components of FinTools
Dimension Selection Filter – Attribute:	Allows the user to make a selection based on an attribute of a dimension, for instance, select on Division = "10"
Dimension Selection Filter – Hierarchy:	Allows the user to make a selection based on a Hierarchy, for instance open UCAR, then open NCAR, then open EOL and select RAF.
Dimension Selection Filter – Subset Level 0 (zero):	Allows the user to make a selection based on a subset. The most common use is selection of "Level 0" which selects at the lowest level, such as all accounts in UCAR or all employees in UCAR.
Dimension Selection Filter – Wild Card:	Allows the user to make a selection based on a Wildcard, for instance, For the Account Dimension, "112*" will select all accounts beginning with 112.
Dimension Selector:	A tool in the UI that allows users to make specific selections such as Fiscal Year, Employees, Account Keys, Fund Source, Budget Type...
Dimension:	<i>Provides the means to filter or group data by account, year, employee etc.</i> A dimension is a type of data that is used to organize or group measures. Consider a column or row label in a spreadsheet. Dimensions are made up of dimension elements.
Employee CSC Charges - Planned:	Planned CSC Charges based on hours planned on that key; CSC rate x hours planned. Typically the applied CSC rate is based on the employee's Home Division or Program and applied to ANY account to which the employee charges hours. Some programs do not have CSC rates.
Employee Records – Current	The current iVantage employee record at the time of the copy form iVantage.

Employee Records – Next	A record created by the user to indicate a PLANNED change in the employee record such as planned promotion, reclass, FTE change – things that would impact planning the cost of an employee's time.
Employee Records – Prior	iVantage records prior to the current record. (Goes back about 5 years)
Employee HRIS Term Date	Official HR System appointment end date, typically for employees with a term appointment.
Employee Begin Date	Date an employment record begins, actual dates for prior and current records, planned dates for future, NEXT records
Employee End Date	Date an employment record ends, actual dates for prior records, planned dates for current and NEXT records.
Expense Class	Overall Expense Categories – such as 5000 – Salaries, 5100 – Benefits, 5200 – Materials and Supplies, 5300 Purchased Services, 5400 Travel, 5500 – Equipment... Typically for budgeting and planning, CSC and PSC are broken out to the expense object codes of 5349 and 5479.
FAB	Forecast and Budgeting Tool - UCAR developed front end user interface (UI) for entering data into Cognos TM1, allows for real-time planning and forecasting of Budgets and Staff
FinOrg	A Financial Organization hierarchy of account keys that rolls up to an agreed upon single structure to be used for planning and reporting.
Forecast:	Actual expenses to date plus planned expenses for remaining months.
Grids – Data Entry	Tables or Grids in the UI for user salary and non-salary planning data entry.
Grids - Reports	Tables or Grids in the UI that provide reports or information to the user.
Hierarchy	Each dimension in a database may have one or more hierarchies applied, which are similar to mapping. For instance UCAR > NCAR > CGD > CESM. Includes FinOrg for Account Keys and HR Org for Employees.
HR Org:	Human Resources Organization hierarchy consisting of employees rolling up to an agreed upon single structure used for planning and reporting.
IFAS Budget Current:	Updated from the IFAS system nightly. Includes Uncommitted Carryover, Committed Carryover, New Funds and Transfers.
Incurred Actuals:	Updated from the IFAS system nightly – actual expenses.
Planning Dimension – Account Key:	List of IFAS (sourced nightly) and placeholder (user-created) account keys, assigned by users within the Financial Organization (Fin Org) hierarchy as defined by the owners of the account keys.
Planning Dimension – Budget Type:	List of budget types used in IFAS and Working Plan scenarios – Uncommitted Carryover, Committed Carryover, New Funds, Budget Transfers, (Expected Funds for Planning only)

Planning Dimension – Employee:	List of iVantage (sourced nightly) and placeholder (user-created) employees assigned by users within the Human Resources Organization (HR Org) hierarchy as defined by the Entity/Lab/Div or Prog
Planning Dimension – Month:	List of months with alternate hierarchy for selecting all months YTD.
Planning Dimension – Year:	List of Fiscal Years (The CMP database currently includes actuals from 2008, Working Plan begins with FY12)
Overhead Rate Type:	The Overhead Rate Type is an attribute on a real or placeholder account key that determines the overhead rate applied to the planned expenses on that key. (The rates are defined in the Scenario Assumptions grid.) The overhead rate types are <ul style="list-style-type: none"> •UCAR GA: UCAR G&A Indirect Cost Rate •NCARON: NCAR On-Site Indirect Cost Rate •NCAROFF: NCAR Off-Site Indirect Cost Rate •UCPON: UCP On-Site Indirect Cost Rate •UCPOFF: UCP Off-Site Indirect Cost Rate
Placeholder Account Key:	An “Account Key that represents a planned project not yet in the IFAS Bi-Tech system. Used to plan salary and non-salary costs.
Placeholder Employee:	An “Employee” that represents a person or planned position not yet in the iVantage system. Used for planning salary expenses.
Scenario – Calculated:	A calculated scenario in the FAB planning model is a scenario that is actively having rules and calculation applied to it as a plan is updated. Contract to a static scenario.
Scenario – Static:	A static scenario is a scenario that has-been copied from a calculated scenario and does not have rules and calculations applied to it. For this reason, a static scenario cannot be updated.
Scenario:	A calculated copy of the plan that allows users to make changes and conduct “What If” analyses.
Non-Salary Planning-Spreading Grid	This grid allows the user to enter a planned amount for an expense class in an account key that is then spread evenly across all months in a fiscal year.
Non-Salary Planning – Monthly Grid	This grid allows the user to enter a planned amount by each month for an expense class in an account key that is then spread evenly across all months in a fiscal year. It also allows the user the edit specific months originally populated from the Spreading Grid.
Subset	A subset is user-defined grouping of dimension elements. It is typically needed when an agreed upon core or alternate hierarchy of dimension elements is not sufficient for all users planning and reporting needs. Creating subsets is currently limited to Super users.
UI – User Interface	UCAR developed front end user interface (UI) for entering data into Cognos TM1
Unallocated Employee Report:	Employees without any account key assignments are unallocated . Employees with partial assignments will not be on the Unallocated Report but they may not be fully allocated.

Upload Report	This report allows users to view, verify totals and export an Excel file for New Funds Budget information for large cooperative agreement uploads to IFAS. (The planned budget is entered as New Funds in the Working Plan, later this information can be adjusted as the planned expenses change.)
Work time %	UCAR has established that the average worked hours is 85% based on historical trends. This average is the default for the UI, but it can be adjusted for a specified time period on a case by case basis for employees whose work time may vary enough to be material in an overall project budget.
Working Plan	A centralized plan for staffing and budgeting, a living plan that is updated, revised and changed as time passes