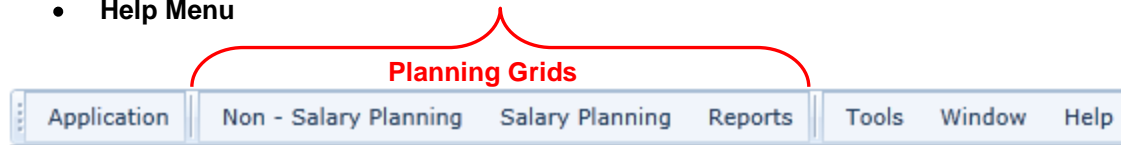


# CPM Quick Reference – Guide to Grids in the UI

## Menu and Grids:

- **Application Menu**
- **Planning grid menus:**
  - **Non Salary Planning Menu** (Data Entry)
  - **Salary Planning Menu** (Data Entry)
  - **Reports Menu**
- **Tools Menu**
- **Windows Menu**
- **Help Menu**



## Application Menu

- **Select the Application** – PERCENT in key **or** HOURLY
  - (Default Application indicated with ★)
- **Set Current Application as Default** – define application you see at log in
- **Save Application Layout** – keeps window layout the same each time you log in
- **Restore Application** - returns to last saved layout

## Non-Salary Planning Menu for Data Entry Grids

- **Plan Subaward MTDC Exclusions**
  - Plan MTDC exclusions typically in Purchased Services or Materials and Supplies (Equipment and PSC are excluded by Expense Class / Object Code)
- **Plan Non-Salary Expenses – Spreading**
  - Spreads one entry evenly over all months in Monthly Grid
- **Plan Non-Salary Expenses – Monthly**
  - Allows for data entry by month, by account, by expenses class

## Salary Planning Menu for Data Entry Grids

- **Plan Employee Assumptions**
  - Adjust an employee's work time or CSC assignment for planning purposes
- **Plan Employee Salaries**
  - View current and prior records; add next records to plan for reclass, promotions etc.
- **PERCENT - Plan Employee Account Allocation % in Key**
  - Plan employee expenses on specific account keys for specific date ranges by % in key
- **HOURLY - Plan Employee Account Allocation – Hours by Quarter**
  - Plan employee expenses on specific account keys for specific date ranges by Hours in quarter by key
- **HOURLY - Plan Employee Account Allocation – Monthly**
  - Plan employee expenses on specific account keys for specific date ranges by Hours in month by key

## Reports Menu for Report Grids

- **Scenario Assumptions**
  - Past, present and projected UCAR rates used in planning calculations
- **Division CSC Rates**
  - Past, present and projected CSC rates used in planning calculations
- **Budget Forecast Analysis Report**
  - Combines IFAS actuals to date with future planning information “forecast” expenses and account balances
- **PERCENT - Employee Projections Annual Pilot Report**
  - Summarizes information based on data input in the Salary Planning Grids, provides means for verification that staff are fully covered and accounts and staff are not over allocated.
- **HOURLY - Employee Projections Quarterly – By Fiscal Year**
  - Summarizes information based on data input in the Salary Planning Grids, provides means for verification that staff are fully covered and accounts and staff are not over allocated.
- **HOURLY - Employee Plan vs. Forecast Hours – By Fiscal Year**
  - Compares Plan to Forecast, provides a means for determining changes, corrections to plan.
- **Upload Report**
  - Isolation of New Funds by large agreement with fields necessary for IFAS budget uploads via Excel Export
- **Workable Hours**
  - Indicates by person, workable hours based on calendar, FTE, and begin and end dates.
- **Unallocated Employees**
  - Indicates active employees who are not allocated to account keys
- **Active Keys with No Planned Expenses**
  - Indicates active keys with no expenses yet planned

## Tools Menu

- **Account Key Placeholders:** Create and edit your placeholder accounts
- **Employee Placeholders:** Create and edit your placeholder employees
- **User-defined Account Attributes:** Create and edit your account key attributes

## Windows Menu – Options for Arranging Open Grids

- **Cascade** Tile
- **Vertical** Tile
- **Horizontal** Tile
- **Arrange Icons** – minimize Open Grids
- **Listing** has all Open Grids, the Active Grid is indicated with a check mark

## Help Menu

- **Online Help** – provides link to FAB website
- **About FAB**