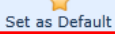# CPM Quick Reference – Setting Up Dimensions - Hourly

Setting Up Basic Dimensions:

Verify Application - % in Key vs. Hourly and set appropriate **Application** as DEFAULT prior to setting up dimension filters.

Within each Grid, click on the dimension selector in the upper left hand corner 〉 to open the selector.

SET/ CHANGE Dimensions as indicated and SAVE 💾 Save the filter for future use.

Set identified Filters as "DEFAULT" for the most commonly used dimensions. ⭐ Set as Default

Salary Planning Grids		
Plan Employee Salaries Grid *NOTE: This grid is continuous; it is **not** associated with a specific Fiscal Year.*		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SAVE AS**, Suggested Naming Convention: - WP ACD Emp Salaries - WP EOL/RAF Emp Salaries **Set as DEFAULT**
Employee Assumptions Grid *NOTE: This grid is continuous; it is **not** associated with a specific Fiscal Year.*		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SAVE AS**, Suggested Naming Convention: - WP ACD Emp Assumptions - WP EOL/RAF Emp Assumptions **Set as DEFAULT**
Employee Account Allocation- Hours by Quarter Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*		
- **Your Employees ANY Key**		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **LEAVE Account at Level 0**, **SET PP Date via Hierarchy Filter** to FY2013 by selecting each of the following via SHIFT "2013 Q1", "2013 Q2", "2013 Q3" and "2013 Q4". **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Emp ANY Key - WP FY2013 EOL/RAF Emp ANY Key
- **Your Keys ANY Employee**		
		SET Accounts via Hierarchy Filter (i.e., UCAR…) to your Home Division/Program, **CHANGE Employees to Level 0 via SubSet**, (You have already selected the FY13 Quarters above), **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Key ANY Emp - WP FY2013 EOL/RAF Key ANY Emp

	Employee Account Allocation- Monthly Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*	
	Your Employees ANY Key	
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **LEAVE Account at Level 0**, **SET PP Date via Hierarchy Filter** to FY2013 by selecting each of the following via SHIFT "2013 Q1", "2013 Q2", "2013 Q3" and "2013 Q4". **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Emp ANY Key - WP FY2013 EOL/RAF Emp ANY Key
	Your Keys ANY Employee	
		SET Accounts via Hierarchy Filter (i.e., UCAR…) to your Home Division/Program, **CHANGE Employees to Level 0 via SubSet**, (You have already selected the FY13 Quarters above), **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Key ANY Emp - WP FY2013 EOL/RAF Key ANY Emp

Report Grids	

	Budget Forecast Analysis Report Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*	
		SET Accounts via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SET Year via Hierarchy Filter to 2013**, **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Key ANY Emp - WP FY2013 EOL/RAF Key ANY Emp **Set at DEFAULT**
	Employee Projections Quarterly- by Fiscal Year Report Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*	
	- **Your Employees ANY Key**	
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SET PayPeriod_Expense (Year) via Hierarchy Filter to 2013**, **LEAVE Account at Level 0**, **SAVE AS**:, Suggested Naming Convention: - WP FY2013 ACD Emp ANY Key - WP FY2013 EOL/RAF Emp ANY Key **Set as DEFAULT**
	- **Your Keys ANY Employee**	
		SET Accounts via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **CHANGE Employees to Level 0 via SubSet**, **Set PayPeriod_Expense (Year) via Hierarchy Filter to 2013**, **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Key ANY Emp - WP FY2013 EOL/RAF Key ANY Emp

Employee Plan vs Forecast – Hours - by Fiscal Year Report Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*		
	- **Your Employees ANY Key**	
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SET PayPeriod_Expense (Year) via Hierarchy Filter to 2013**, **LEAVE Account at Level 0**, **SAVE AS**:, Suggested Naming Convention: - WP FY2013 ACD Emp ANY Key - WP FY2013 EOL/RAF Emp ANY Key **Set as DEFAULT**
	- **Your Keys ANY Employee**	
		SET Accounts via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **CHANGE Employees to Level 0 via SubSet**, **Set PayPeriod_Expense (Year) via Hierarchy Filter to 2013**, **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Key ANY Emp - WP FY2013 EOL/RAF Key ANY Emp
Workable Hours Report Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year. Current Default is FY13 Quarters.*		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SAVE AS**, Suggested Naming Convention: - WP ACD Emp Assumptions - WP EOL/RAF Emp Assumptions **Set as DEFAULT**
Upload Report Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*		
		SET Accounts via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SET Budget Type via Hierarchy Filter** to New Funds, **SET Fund Source via Hierarchy Filter** to NSF BASE, **SET Year via Hierarchy Filter** to 2013, **SAVE AS**, Suggested Naming Convention: - WP FY2013 ACD Prelim NSF Upload - WP FY2013 EOL/RAF Prelim NSF Upload **Set as DEFAULT**
Unallocated Employees Report Grid *NOTE: This grid is continuous; it is **not** associated with a specific Fiscal Year.*		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SAVE AS**, Suggested Naming Convention: - WP ACD Unallocated - WP EOL/RAF Unallocated **Set as DEFAULT**
Active Keys with No Planned Expenses Report Grid *NOTE: This grid is continuous; it is **not** associated with a specific Fiscal Year.*		
		SET Accounts via Wild Card Filter, (i.e., 10*) to your Home Division/Program, **SAVE AS**, Suggested Naming Convention: - WP ACD Unplanned Keys - WP EOL/RAF Unplanned Keys **Set as DEFAULT**

CPM Quick Reference – Setting up Dimensions

		Time Card Check Report Grid *NOTE: This grid is associated with a specific Pay Period.*

		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **Set PayPeriod_Expense (Year) via Hierarchy Filter to a specific Pay Period**, **SAVE AS**, <u>Suggested Naming Convention:</u>
		   - WP ACD Time Card Check PP2013-5
		   - WP EOL/RAF Time Card Check PP2013-5
		Set as DEFAULT

Non-Salary Planning Grids		
		Plan NonSal Expenses – Annual Spreading Working Plan Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*

		SET Accounts via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **SET Year via Hierarchy Filter to 2013**, **SAVE AS**, <u>Suggested Naming Convention:</u>
		   - WP FY2013 ACD NonSal
		   - WP FY2013 EOL/RAF NonSal
		Set as DEFAULT

		Plan NonSalary Expenses Monthly Grid *NOTE: This grid is associated with a specific time-frame, typically fiscal year.*

		SET Accounts via Hierarchy Filter, (i.e., UCAR..) to your Home Division/Program, **SET Year via Hierarchy Filter to 2013**, **SAVE AS**, <u>Suggested Naming Convention:</u>
		   - WP FY2013 ACD NonSal
		   - WP FY2013 EOL/RAF NonSal
		Set as DEFAULT

		Plan SubAward MTDC Exclusions Grid *NOTE: This grid is associated with a specific time-frame, typically Fiscal Year.*

		SET Accounts via Hierarchy Filter, (i.e., UCAR) to your Home Division/Program, **SET Year via Hierarchy Filter to 2013**, **SAVE AS**, <u>Suggested Naming Convention:</u>
		   - WP FY2013 ACD NonSal
		   - WP FY2013 EOL/RAF NonSal
		Set as DEFAULT

- **Wild Card for Account Keys** will show any key beginning with your Division Code, but will not include Placeholders, these account keys begin with "PH"
- **Hierarchy for Account Keys** will show all keys assigned to the selected FinOrg, including Placeholders. It will not include any new keys not yet assigned in your FinOrg.