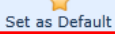# CPM Quick Reference – Setting Up Dimensions

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 Grid *NOTE: This grid is continuous; it is **not** associated with a specific Fiscal Year.*		
- **Your Employees ANY Key**		
		SET Employees via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, **LEAVE Account at Level 0**, **SAVE AS**, Suggested Naming Convention: - WP ACD Emp ANY Key - WP 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**, **SAVE AS**, Suggested Naming Convention: - WP ACD Key ANY Emp - WP 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 Annual % in Key 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

Report Grids, Cont.

	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**

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**, Suggested Naming Convention: - 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**, Suggested Naming Convention: - 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**, Suggested Naming Convention: - 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.