## 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 DimensionButton.jpg to open the selector. SET/ CHANGE Dimensions as indicated and SAVE  the filter for future use.

Set identified Filters as “DEFAULT” for the most commonly used dimensions. 

**Grids most Critical to Planning**

Please note, the underlined names are the items you need to set in the Dimension Filter. Some names seem like they should change, but these will not produce the filtering you need. Most of what you will change is “Employee”, “Account”, and “Year” or some variation of that with Pay Period…

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| **Salary Planning Grids** | | |
|  | **Plan Employee Salaries Grid *NOTE:*** *This grid is continuous; it is* ***not*** *associated with a specific Fiscal Year.* | |
|  |  | **SET** Employee 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 Employee 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** |
|  | **% in Key Employee Account Allocation Grid *NOTE:*** *This grid is continuous; it is* ***not*** *associated with a specific Fiscal Year.* | |
|  | * **Your Employees ANY Key** | |
|  |  | **SET** Employee 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 |
|  |  | **SET** Account via Hierarchy Filter (i.e., UCAR…) to your Home Division/Program, **CHANGE** Employee to Level 0 via SubSet, **SAVE AS**, Suggested Naming Convention:   * WP ACD Key ANY Emp * WP EOL/RAF Key ANY Emp |
|  | **Hourly 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** Employee via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, LEAVEAccount at Level 0, **SET** PP Date via Hierarchy Filter to 2014-Q1, 2014-Q2, 2014-Q3, 2014-Q4 with CTRL to select each of the four Quarters. **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Emp ANY Key * WP FY2014 EOL/RAF Emp ANY Key |
|  | * **Your Keys ANY Employee** | |
|  |  | **SET** Account via Hierarchy Filter (i.e., UCAR…) to your Home Division/Program, **CHANGE** Employee to Level 0 via SubSet, (You have already selected the FY13 Quarters above), **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 EOL/RAF Key ANY Emp |
|  | **Hourly Employee Account Allocation- Monthly Grid *NOTE:*** *This grid is associated with a specific time-frame, typically fiscal year.* | |
|  | **Your Employees ANY Key** | |
|  |  | **SET** Employee via Hierarchy Filter, (i.e., UCAR…) to your Home Division/Program, LEAVEAccount at Level 0, **SET** PP Date via Hierarchy Filter to 2014-Q1, 2014-Q2, 2014-Q3, 2014-Q4 with CTRL to select each of the four Quarters. **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Emp ANY Key * WP FY2014 EOL/RAF Emp ANY Key |
|  | **Your Keys ANY Employee** | |
|  |  | **SET** Account via Hierarchy Filter (i.e., UCAR…) to your Home Division/Program, **CHANGE** Employee to Level 0 via SubSet, (You have already selected the FY13 Quarters above), **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 EOL/RAF Key ANY Emp |

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| **Report Grids** | | |
|  | **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** Employee via Hierarchy Filter, (i.e., UCAR… ) to your Home Division/Program, **SET Year** via Hierarchy Filter to 2014, **LEAVE** Account at Level 0, **SAVE AS**:, Suggested Naming Convention:   * WP FY2014 ACD Emp ANY Key * WP FY2014 EOL/RAF Emp ANY Key   **Set as DEFAULT** |
|  | * **Your Keys ANY Employee** | |
|  |  | **SET** Account via Hierarchy Filter,(i.e., UCAR…) to your Home Division/Program, **CHANGE** Employee to Level 0 via SubSet, **SET PayPeriod\_Expense (Year)** via Hierarchy Filter to 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 EOL/RAF Key ANY Emp |
|  | **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 2014**, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 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 2014**, **LEAVE Account at Level 0**, **SAVE AS**:, Suggested Naming Convention:   * WP FY2014 ACD Emp ANY Key * WP FY2014 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 2014**, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 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 2014**, **LEAVE Account at Level 0**, **SAVE AS**:, Suggested Naming Convention:   * WP FY2014 ACD Emp ANY Key * WP FY2014 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 2014**, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Key ANY Emp * WP FY2014 EOL/RAF Key ANY Emp |
|  | **Hourly - Workable Hours Report Grid *NOTE:*** *This grid is associated with a specific time-frame, typically fiscal year. Current Default is FY13 Quarters.* | |
|  |  | **SET** Employee via Hierarchy Filter, (i.e., UCAR… ) to your Home Division/Program, **SET Date\_PP** via the Hierarch Filter to 2014-Q1, 2014-Q2, 2014-Q3, 2014-Q4 with CTRL to select each of the four Quarters. **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Workable Hours * WP FY2014 EOL/RAF Workable Hours   **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 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Prelim NSF Upload * WP FY2014 EOL/RAF Prelim NSF Upload   **Set as DEFAULT** |
|  | **Unallocated Employees Report Grid *NOTE:*** *This grid is associated with a specific time-frame, typically fiscal year.* | |
|  |  | **SET** Employee via Hierarchy Filter, (i.e., UCAR… ) to your Home Division/Program, **SET** Year via Hierarchy Filter to 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Unallocated * WP Fy2014 EOL/RAF Unallocated   **Set as DEFAULT** |
|  | **Active Keys with No Planned Expenses Report Grid *NOTE:*** *This grid is associated with a specific time-frame, typically fiscal year.* | |
|  |  | **SET** Account via Wild Card Filter, (i.e., 10\* ) to your Home Division/Program, **SET** Year via Hierarchy Filter to 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD Unplanned Keys * WP FY2014 EOL/RAF Unplanned Keys   **Set as DEFAULT** |
|  | **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**, Suggested Naming Convention:   * WP ACD Time Card Check PP2014-5 * WP EOL/RAF Time Card Check PP2014-5   **Set as DEFAULT** |
|  | **Unallocated Employees by Pay Period Report Grid *NOTE:*** *This grid is continuous; it is* ***not*** *associated with a specific Fiscal Year.* | |
|  |  | **SET Employee via Hierarchy Filter**, (i.e., UCAR… ) to your Home Division/Program, **SET PayPeriod\_Expense by Hierarchy Filter** to current FY and next or future Pay Period via Hierarchy Filter, **SAVE AS**, Suggested Naming Convention:   * WP ACD Time Unallocated PP2014-5 * WP EOL/RAF Unallocated PP2014-5   **Set as DEFAULT** |

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| **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 2014**, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD NonSal * WP FY2014 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** Account via Hierarchy Filter, (i.e., UCAR..) to your Home Division/Program, **SET** Year via Hierarchy Filter to 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD NonSal * WP FY2014 EOL/RAF NonSal   **Set as DEFAULT** |
|  | **Plan MTDC Exclusions Simple Grid *NOTE:*** *This grid is associated with a specific time-frame, typically Fiscal Year.* | |
|  |  | **SET** Account via Hierarchy Filter, (i.e., UCAR..) to your Home Division/Program, **SET** Year via Hierarchy Filter to 2014, **SAVE AS**, Suggested Naming Convention:   * WP FY2014 ACD NonSal * WP FY2014 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.