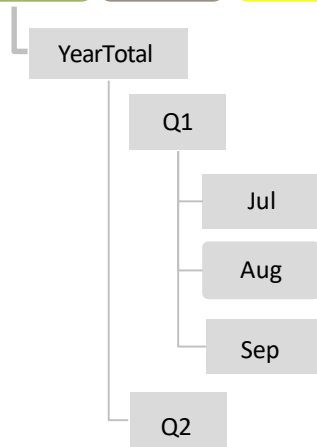


Dimensions define how data is organized in the CalPlanning tools.



Dimensions are made up of members.

The **Period** dimension includes all of the **YearTotal** members.


Member represent items within a Dimension.

The **Year Total** members include each of the four quarters and 12 months of the fiscal year.

Dimensions Defined

Below is a list of the CalPlanning dimensions and their definitions. You will select **Intersections** or unique combinations of dimension members to access a data point to create and analyze your plans within the CalPlanning applications- CalPlan, CalRptg, HCP & HCP Rptg.

Dimension	Definition	Members
Year FY20	Contains the list of available 12 month fiscal years (FY) from July to June.	2011-2012 (FY12), 2012-2013 (FY13), 2013-2014 (FY14), 2014-2015 (FY15), 2015-2016 (FY16), 2016-2017 (FY17) 2017-2018 (FY18), 2018-19 (FY19), 2019-2020 (FY20), 2020-21 (FY21)
Scenario Forecast	Differentiates between the types of financial data available to read, create and edit and supports variance analysis over plan types.	Actual historical data from closed periods Forecast current year projected budget Operating Budget future year planned budget
Version Working	Allow for multiple iterations of financial data to support comparisons over time and variance analysis. Planners update the Working version, and Working versions are copied to Planner Submission (and Final) as financial plans are due throughout the budget cycle.	Initial read only snapshot taken at the beginning of a scenario and year lifecycle Working editable iteration for plan creation and revision Prior Month read only snapshot used with the forecast to provide visibility to the closed month’s forecast after the actual data is loaded Taken at the last business day of the month Q1, Q2 & Q3 Submissions read only snapshot of reforecast data Planner Submission read only snapshot of financial data taken after a plan due date, staging version Final read only snapshot of financial data taken after a plan is finalized or monthly actuals are available
Period YearTotal	Contains the list of timeframes with three options for members - YearTotal, by quarter, or by month.	Year Total Quarters 1, 2, 3 & 4 Months July through Jun <i>Be aware if you leave this dimension at the highest level (Period), you will be including Period 0 (beginning balance)</i>

Dimension	Definition	Members	
Account A550XX_Plan	Represents BFS Accounts. Individual and in some areas summarized accounts for strategic planning.	Examples: Total Expenses Salaries & Wages** Total Revenue & Transfers **HCP & HCPRptg only include Compensation related accounts	
Entity 1_26301	Represents organizational units sourced from BFS (Campus, Divisions, Departments, and DeptIDs). It is the concatenation of BFS Business Unit 91 or j) and org segments separated by an underscore.	Examples: 1_EVCP3 – Exec Vice Chancellor & Provost 1_IBIBI – Integrative Biology 1_HAAS3 – Haas School of Business	
Fund Unrestricted Plan	Represents the Fund field in BFS. Unrestricted – Plan Designated – Plan Restricted Gift – Plan Restricted Endowments & FFE – Plan Contracts and Grants – Plan	Total Funds – includes all current and some non-current funds Current Funds – Five fund types or buckets that roll u into the Current Funds major fund group, which captures the financial activity and balances associated with the campus’ annual operations. Current Funds Excluding C&G (available in CalRptg only) – Use to see five fund types or bucket values, excluding contracts and grants. Particularly important in actuals reporting when the accounting for contracts and grants has changed in past several years.	
Chart1 C1_SUMPLN	Represents the Chartfield 1 values in BFS	Subset of Chart1s and C1_SUMPLN (Chart1 Plan) available for planning in CalPlan and HCP All Chart1s available in CalRptg and HCPRptg to view Actual data	
Chart1 Total_C2	Represents the Chartfield 2 values in BFS	Total_C2	<i>Dimensions only available in CalRptg, HCPRptg & Smart View to report on Actual data.</i> <i>(Note: Time Series can be applied to budget/forecast data as well)</i>
Program Code	Represents the Program Code values in BFS	Program_Code	
Time Series Periodic	Allows for reporting on static or cumulative, to-date time periods	<ul style="list-style-type: none"> • Periodic • Year to Date (YTD) • Quarter to Date (QTD) • Rounding in Thousands or Millions 	
 Employee	Represents an employee. Existing employees are being sourced from HCM. To-be-hired employees can be created in HCP by a planner.	E0001114 (E + Employee ID#)	<i>Dimensions only available in HCP & HCPRptg</i>
Job Code	The four numeric characters from the campus Job Code (also referred to as the Title Code) and the corresponding Job Code description.	Examples: 001100_Professor-Acad Yr 004722_Assistant III 007709_Financial Analyst 3	