



UCSF

# UPlan Reference Guide: Dimensions



UCSF

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## Reference Guide: Dimensions

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UPlan is a dimensional database. This reference guide discusses the Dimensions of UPlan.

#### What are Dimensions?

**Dimensions** are data elements or variables and are the primary way that your data is categorized within the system.

Dimensions are made up of **members**, and these come together to form **intersections**. **Planning intersections** are where the dimensions come together at the lowest level for data entry. Data is stored in planning intersections and UPlan calculates the higher level data values.

Following is the list of dimensions used in the General Planning module.

Dimension	Definition
Year	Fiscal year
Period	Time period
Scenario	Type of data
Version	Iteration of a scenario
Account	Type of revenue or expense
DeptID	Department
Fund	Source of support
Project	Activity

Of these UPlan dimensions, four relate to chart fields: Account, DeptID, Fund, and Project. Note that UPlan does **not** use the other four chartfields (Business Unit, Function, Flexfield, or Activity Period).

There are additional dimensions in the Employee Planning module: Employee, Job Code and Account (different from the General Planning and COA Account).

#### Year

Year allows for storage of historical data and multiple years of plan/forecast data. Year provides the time dimension to complete year-over-year comparisons. Fiscal year is represented in YYYY-YY format, such as 2021-22 for next year’s plan. The year may be referred to relative to the current year.

Term:	Refers to:	During Spring 2021:
Year 0	Current year	2020-21
Year 1	Upcoming fiscal year	2021-22
Year 2	Subsequent fiscal year	2022-23

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## Period

Period identifies the timeframe granularity of planning and is a required Hyperion Planning dimension. The Period dimension is based on the UCSF fiscal calendar with a June 30 year-end (July – June). Period members include Year Total, and 12 months July to June. Months are abbreviated as three characters, such as Jun, Jul, etc.

You will also see a special member called BegBalance, which stands for Beginning Balance. This allows for storing drivers, percentages, annual amounts, or other data that do not necessarily apply to a month.

## Scenario

Scenario describes the type of data that a plan includes, such as Plan, Actual, or Forecast data. The Actual scenario contains actual financial transaction and balance data. Plan scenarios contain budget information, generally developed during the spring planning process.

Forecast includes a combination of actuals and forecast for the current year. Forecast includes actual data for closed periods and current year updated expectations for the remainder of the year.

## Version

Version represents iterations of planning scenarios and generally identifies whether a scenario is in progress or complete.

- Planners do their work using the “Working” version.
- “Final” versions are those that have been locked-down and will no longer change. Actuals are also stored as Final versions.
- An “Initial” version is used in Employee Planning to represent salaries and benefit estimates before changes have been made.
- The “Approved” version is available for storing approved plans before they are made final.

## Account

The Account dimension is largely based on the new UCSF Chart of Accounts, but modified to allow for strategic budgeting and planning. UPlan provides two Account levels for planning:

- Most campus units will use Level C of the Account tree
- FAS will use Level E of the Account tree

Additional UPlan Accounts are included to capture other information, such as salary components, enrollment and tuition rates, and commitment transfers.

Note that there are no asset and liability accounts within UPlan.

## DeptID

DeptID represents the planning unit within the organizational structure. DeptIDs are 6 numbers long, such as D330000 for the School of Pharmacy. Note that in order to avoid system errors, UPlan includes



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the letter “D” in front of all DeptID numbers. In some areas, such as MyOrg, this prefix “D” will be visible before a DeptID number. In other areas, such as dropdown menu filters, it will not.

Within a Control Point, planning may occur at any level of the DeptID tree.

- Planning DeptIDs are determined in PeopleSoft.
- Most departments will plan at the posting level.

Planner access to DeptIDs is based on your User ID. While you may have read access to all levels of DeptIDs, you can only plan on those designated as your planning DeptIDs. You cannot enter and edit forecasts and plans for DeptIDs above your Planning DeptIDs. Here are some related terms:

Term	Definition
DeptID	The UPlan dimension representing organizational units, which can be Control Points, departments, divisions, or other units.
Planning DeptID	A DeptID in the UCSF DeptID tree, either at the posting (leaf) level or a parent level that is designated as the organizational level for which plans will be developed in UPlan.
Source DeptID	The organizational unit planning to transfer funds to another unit (the Target Department). For a specific commitment, the Source Department and the Target Department may be the same.
Target DeptID	The organizational unit designated to receive transfer funds from another unit (the Source Department). For a specific commitment, the Source Department and the Target Department may be the same.

### Fund

Fund identifies where money comes from, such as the State Educational Appropriation, a federal grant, or earnings from an endowment. All planning occurs at the posting level of the Fund tree. Funds are 4 digit codes, such as 4000 for Federal Grants.

Agency, endowment principal, and loan funds are excluded from UPlan. Planning capability is not provided for these types of funds.

### Project and Project Use

The Project dimension identifies the activity being planned. Projects (and Project Uses) all have 7-digit codes, such as 2011381 for Instructional Grants Program.

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While the campus will have thousands of projects, they each have an attribute that is assigned in PeopleSoft called Project Use, which places the project in one of several categories.

Project Use plays a role in how planning occurs in UPlan. Planning may occur at the specific project level in UPlan, but it is also possible to plan at the Project Use level or even at the “NoProject” level.

### UPlan-only Projects

While planning may occur at the project level in UPlan, sometimes users will need to plan ahead for activity that does not yet have a Project ID or perhaps for a group of activities without Project-specific information yet available. Or, planners may decide to plan at the Project Use level to reduce their planning workload. To accommodate planning in these cases, UPlan includes a series of UPlan-Only projects, 13 in total, each one identified as pertaining to a specific Project Use. Planners may select any of these projects and enter plans on the Revenue & Expense form. All planning-only adjustment projects have the prefix of “ADJ” in their description.

Project ID	Project Description	Project Use	Purpose
<b>2011364</b>	ADJ Sponsored	SPONSORED_PROJ	Adjustment projects, used in general planning and employee planning to plan additional sponsored activity not without a project ID. Not used in Commitment Tracking.
<b>2011367</b>	ADJ Recruitment	RECRUIT_FAC_STARTUP	Adjustment projects, used in all spaces to plan additional activity not covered by an existing project. May also be used to avoid planning at the project level. Not used in Commitment Tracking.
<b>2011377</b>	ADJ Other Faculty/PI	FAC_PI_OWNER_ACTV	
<b>2011379</b>	ADJ Retention	RETENTION	
<b>9002614</b>	ADJ Capital	CAP_PLANT	
<b>2011374</b>	ADJ General	GENERAL	
<b>2011375</b>	ADJ Affiliations	AFF_AGREE_CON	
<b>2011376</b>	ADJ Pgm Investments	PROG_INVESTMT	
<b>2011378</b>	ADJ MC Activities	MED_CTR_ACTV	
<b>6000468</b>	ADJ Loan	LOAN_STU_FAC_STAFF	
<b>8001131</b>	ADJ Recharges	RECHARGE	
<b>8500020</b>	ADJ Recharges External	RECHARGE_EXT	
<b>8800131</b>	ADJ Costed Central	COSTED_CEN_ACTV	

### Capital Projects

Total allocations for capital projects will be planned in the Commitment Tracking module. Capital projects will be shown on the Revenue & Expense form only in the aggregated UPlan-only project ID 9002614 ADJ Capital. **Detailed expense budgets can be planned in the General Planning module.** On the Revenue & Expense form, the ADJ project will show the total amount planned for additional projects



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that do not yet exist. For the ADJ Capital projects, expense accounts 5300C and 5315E will be auto-populated with the planned total transfer amount.

### DeptID – Fund – Project Combinations

Planning typically occurs at a combination of DeptID, Fund, and Project members. We use the abbreviation DFP as shorthand for these combinations. The DFP combination (combination of DeptID, Fund and Project) determines what data you are viewing, and where you are entering or editing data. When planning in UPlan, it is important to consider all of your DFP combinations. In General Planning, the revenue and expense form allows data entry by DFP combination.

### Dimensions in Employee Planning

Dimensions within Employee Planning are similar to those in General Planning. The **Scenario, Year, Period, Version, Fund, and Project** are the same in both General Planning and Employee Planning.

However, there are a few details to note regarding the **Account** and **DeptID** dimensions. There are also two additional dimensions unique to the Employee Planning module: **Employee** and **Job Code**.

The following sections give details on these differences.

#### Account Dimension

The Account dimension in Employee Planning uses special UPlan Accounts. You won't find these accounts in the Chart of Accounts. These special accounts are used in column headings in Employee Planning to identify data elements associated with salary and benefits. They are mapped to the appropriate Level C or E expense accounts, so that Employee Planning data flows into General Planning.

#### DeptID Dimension: Salary Level Planning versus Pay Distribution DeptIDs

DeptID in the Employee Planning module will be the same as it is in General Planning. (See Class 1 Lesson on General Planning for detail on DeptID.) However, there are a few additional notes on DeptIDs for the Employee Planning module.

In UCPath, multiple departments may provide funding for an individual's salary and benefit cost, but only one department is identified as the individual's primary department.

In UPlan, only one planning DeptID will have control of and can make adjustments to the planned total salary and benefit level for an individual. This planning DeptID is based on the primary department in UCPath and is referred to as the **Salary Level Planning Department**.

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Users will be able to view the full pay distribution of an individual employee but users can plan and adjust the pay distribution for an individual's salary and benefits costs only for the planning DeptIDs for which they have control. That is, users cannot adjust or add pay distributions for DeptIDs that they do not have write access. These planning departments are referred to as **Pay Distribution Departments (DeptIDs)**.

### Mapping Employees from Primary Departments to Salary Level Planning Departments (DeptIDs):

Because UCPATH primary departments may not be planning DeptIDs themselves, a process was established to map Primary Departments to Salary Level Planning DeptIDs based on Control Point and department input.

The following table summarizes the relationships between the UCPATH DeptID terminology and the UPlan DeptID terminology:

In UCPATH	In UPlan	Notes
Primary Department: Each employee has one Primary Department in UCPATH that manages employee data, salary levels, etc.	<b>Salary Planning Department:</b> Each employee is assigned to one and only one Salary Planning Department in UPlan. Planners for this DeptID will be able to set employee salary and benefit levels.	These may be the same, but only if the UCPATH Primary Department is a planning department in UPlan.
Payroll Department: Any number of departments may provide funds to cover an employee's salary and benefits.	<b>Planning Payroll Department:</b> Any number of departments may <u>plan</u> funds to cover an employee's salary and benefits.	These may also be the same, but only if the payroll department is a planning department in UPlan.

### Employee Dimension

The Employee dimension will identify individual employees of UCSF as well as individual and group provisions for employees to be hired.

The employee dimension will include two hierarchies:

- Existing Employees – a flat list in alphabetical order by employee name
- New Employees – a pre-defined and unique list of TBH (to-be-hired) employees to be used for planning new hires

Existing employees will not be grouped by department or campus. When searching for an employee in a UPlan prompt, the listing is in alphabetical order based on last name and grouped by alphabet (e.g., A-C, D-H, I-L, M-Q, R-T, and U-Z).



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### Job Code Dimension

The Job Code dimension is used in the Employee Planning module to identify all of the job codes an individual employee has. An employee can have multiple appointments and job codes. When this happens, the Job Code ensures that you can plan for that employee for each Job Code. Users will not be able to change or add Job Codes for existing employees. Job Codes will be organized in a hierarchy by Union Code (usually bargaining unit). To look up a Job Code and its Union Code, refer to the Job Code lookup in MyReports or the HR website.