# UPlan Weekly Digest

**Friday, June 30, 2017**

## Announcements:

- **June Actuals Schedule:**
  - Prelim actuals will be loaded on Monday, July 17.
  - Interim actuals will be loaded on Monday, July 24.
  - Final actuals will be loaded during the UPlan year-end/open process in August (information on the year-end/open timeframe is forthcoming).

## Tips & Tricks:

- **To Clear the Smart View Add-in Error in Excel:**  If you receive an error message when opening a Microsoft Access macro file, your Smart View may need to be re-installed.  See the instructions below to download and install Smart View.
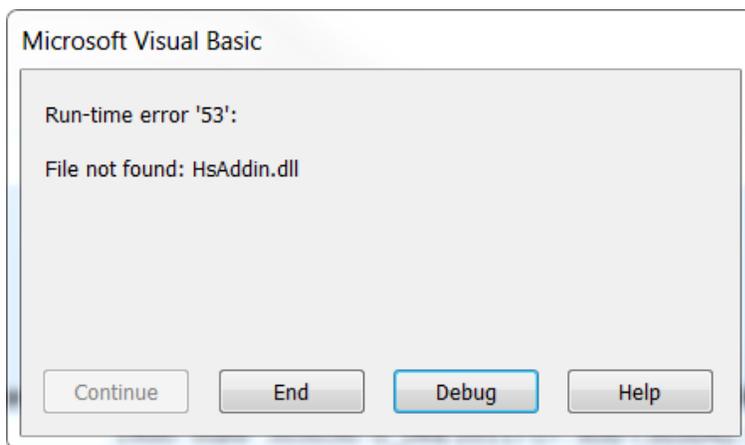


Smart View is available for download on the UPlan website.  To download:

1. Confirm you have admin access to your machine.  If you do, skip to Step 2.  If you do not, you will be unable to download Smart View.  To request admin access, put in an ITS ServiceNow INC ticket and give the IT Field Services representative these instructions:
2. Close all Microsoft products (Internet Explorer, Outlook, Word, Excel, Access, Visio, Project, PowerPoint, Lync, OneNote, InfoPath, Publisher, etc.)
3. Download Smart View from **any browser except Internet Explorer** from the UPlan website at https://brm.ucsf.edu/uplan > click on Training and Job Aids > Download Smart View.
4. Click "Run" in the dialog box that appears.
5. Downloading may take several minutes depending upon the speed of your computer or network connection.  During the process, you may see several black boxes flashing on the screen.  Do not touch the boxes or attempt to control the download process.  When the download process is finished, you will see a small dialog box confirming the download is complete.
6. Open Excel.

The complete instructions can be found on page 6 of the Smart View: Installation and Planning Forms training manual.  Contact uplan@ucsf.edu with any issues.

## Bug Fixes & Enhancements:

- Reference the UPlan Enhancements page for a complete list of enhancements relevant to the last fiscal year.

- **Add Account feature in UCSFPlan**:  There is sometimes an issue if all of the following is true:
  - You are using Smart View to Add Account; and
  - Use Aliases is enabled in the Member Selection options; and
  - The account includes a comma "," and/or "&" follow by a space then, you <u>may</u> receive an error saying 'The member does not exist for the specified plan type or you do not have access to it'.  The error stems from Excel reading the comma and/or & as code to split the alias into two lines rather than one.
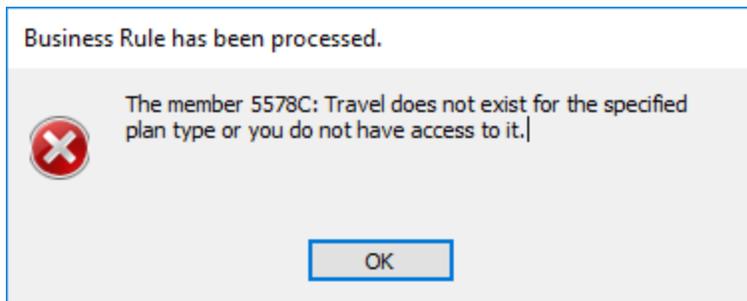


To resolve, you can either:

1.  Add **quotation marks** to the account name and alias.  Click **Ok**.
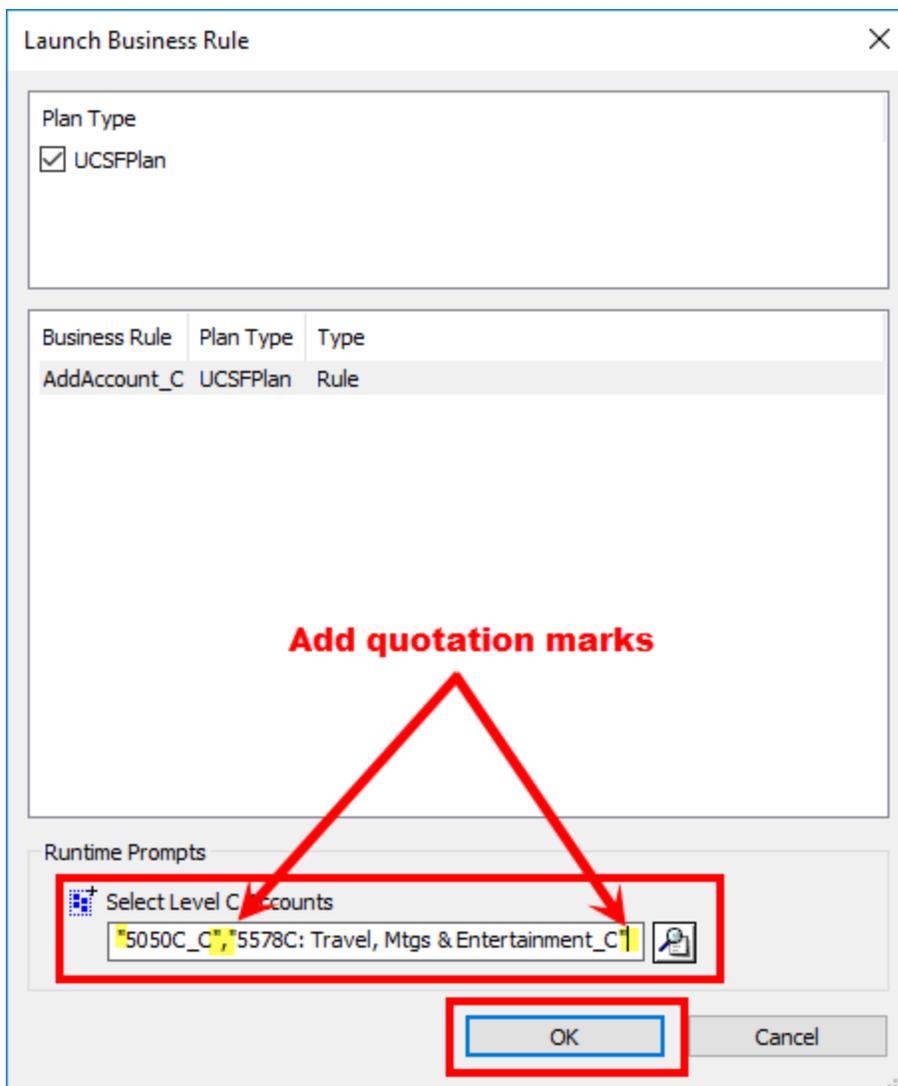
OR

2. **Delete** the alias name and click **Ok**.
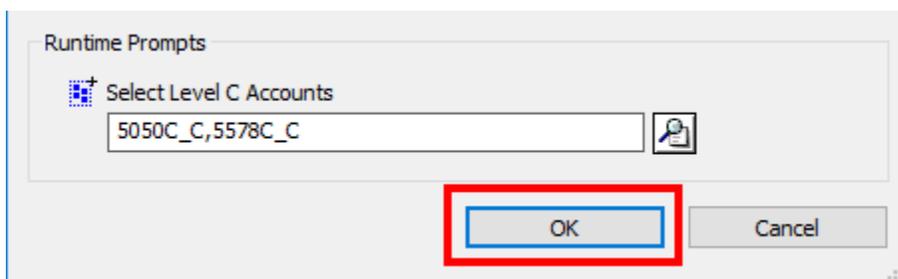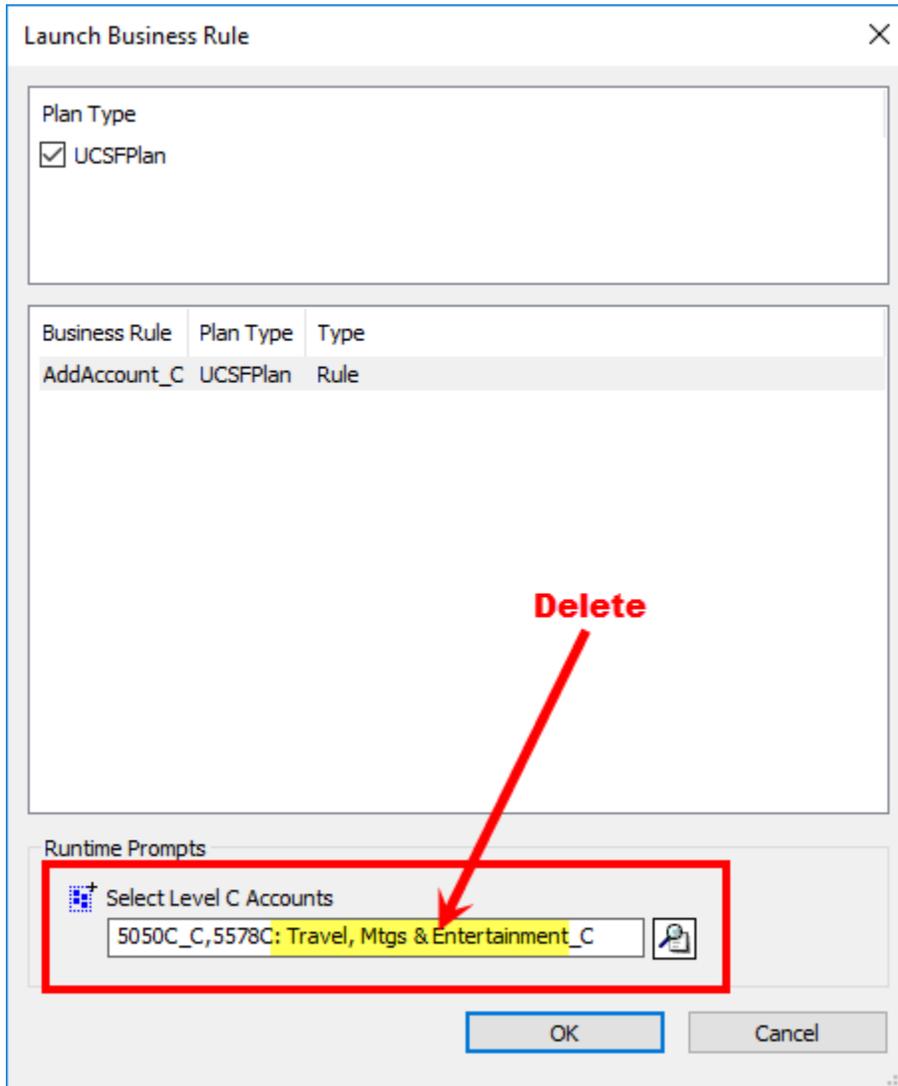




- Reference the UPlan Known Issues page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under "Bug Fixes & Enhancements".