

## UPlan Updates

Friday, October 16, 2015

### Third Sunday Maintenance:

- Sunday, October 18 is the third Sunday of the month. UPlan will be down for maintenance from 6am to 6pm.

### Tips and Tricks:

- **FR Reports under “Explore” in UPlan Web:** If your cursor does not properly select the right folder or report, it may be an internet browser Zoom setting. To resolve, go to “View” on your browser menu and click on Zoom->Reset.

### Known Issues:

- **Automated Employee to General Integration:** The automated “Employee Planning to General Revenue & Expense” portion of internal integration remains turned off. **Please manually integrate** changes to employee data by launching “Push Empl Data to General” under My Task List>Employee Planning for your DeptID (can be at parent DeptID level).
- **TBH Composite Entry form:** Upon save, the calculation does not properly calculate the salary level and distribution dollars. This issue only impacts TBH’s carried forward from last year’s Plan and not any newly created TBH’s. We are working on a resolution.  
**TBH Distributions for Closed Months:** The distribution percentages and dollar amounts for TBH’s do not clear when the Forecast month closes. This has **no impact on forecasts** in General Planning, but results in overstated dollars on Employee Planning reports, (Compensation Detail by DFP and Multi-Empl Distr Pct and \$) and data entry forms. Users should simply ignore the TBH distribution percentage and distribution dollar for closed (actualized) months.
- **Purged and Separated Employees with Actuals:** Of the ~9000 separated and inactive employees purged from UPlan in September, 144 employees had payroll actuals retroactively posted for 2015-16. Although these employees have separated and inactive statuses, we will add them along with the associated actuals back into Employee Planning. All future issues related to purged employees with retroactive payroll actuals will be loaded as needed. We anticipate resolution by the October actuals load.

### Bug Fixes and Enhancements:

- **RESOLVED - 2015-16 Salary Global Assumptions for New Title Codes:** For employees with new title codes related to the IT Job Family Career Tracks Titles effective July 1, 2015, the Base&Neg salary levels/rates in the 2015-16 Forecast do not have the July 1 global assumptions applied.
- **RESOLVED - Total Net Position Beginning of Period:** All net position issues have been resolved. Please note that future variances against MyReports may occur if future adjustments are made to June Final 2015.
- **RESOLVED – FR Reports:**
  - The first column for Final Actual in below General reports showed the current year 2015-16 but now correctly reflect the previous year 2014-15.
    - Current Year Forecast v Future Plans - Level C\_New
    - Current Year Forecast v Future Plans - Level E

- Current Year Plan v Forecast - Level C\_New
  - Current Year Plan v Forecast - Level E
- The current year 2015-16 appearing at the top of the below Commitment reports have been hidden. This caused some confusion as the Total Commitment Amount reflects the total across all the years.
  - Commitments by Source - Summary
  - Commitments by Target – Summary
- **Navigation to Individual Employee Form:** Planners can now navigate to the individual employee form on the below Multi-Employee forms and report. To do so, right-click on the rightmost cell of the selected row and click “Go to Empl Forms” or “Go to TBH Forms”.
  - “Multi-Empl Sal & Ben Level” form
  - “Multi-Empl Distr Pct” form
  - “Multi-Empl Distr Pct and \$” report
- **Navigation to Revenue and Expense Form:** Planners can now navigate to the Revenue and Expense form on the below General Planning form reports. To do so, right-click on the rightmost cell of the selected row and click “Go to RevExp Lvl C” or “Go to RevExp Lvl E”.
  - Completion Tracking
  - Plan Net Position
  - Net Position – Actual and Forecast by DeptID and Fund
  - Net Position – Actual and Forecast by DFP
  - Net Position - Actual and Forecast by Fund