UPlan Weekly Digest

Friday, March 18, 2016

Announcements:

Upgrade to the newest version of Smart View: Oracle has released a new version of Smart View that includes
minor improvements. Please install this latest version at your earliest convenience. First, read the Install
Instructions in the <u>Smart View Training Manual</u>. To access the latest version of Smart View when in UPlan, click
Tools > Install > Smart View and you will be brought to the UPlan Training and Job Aids page. Or, you can visit
the <u>UPlan Training and Job Aids</u> page directly and click on the "Install Smart View" link under the Executable File
section.



 Smart View URL: If you haven't already done so, please update your Smart View URL by following the below instructions. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section of the <u>March 4th Weekly Digest</u>.

To update the URL:

 Open Excel > click on Smart View ribbon > click on Options > Advanced Tab > insert this URL: <u>http://hyperwebprod04:19000/epmstatic/SmartView_Connections.xml</u>



2. Click on the triangle on the OK button > Save as Default Options.



- Updated UPlan Job Aids: Several of the UPlan Job Aids have been updated for Spring 2016 at <u>https://brm.ucsf.edu/uplan-training-and-job-aids</u>. Training manuals and slides are also available for reference.
- **PeopleSoft Financial System Upgrade**: PeopleSoft is scheduled to be down starting March 24th and back up on March 28th. UPlan nightly load processes related to certain ChartFields will be affected during this time though we anticipate minimal impact. More information pertaining to the PeopleSoft upgrade can be found on the Controller's Office website: <u>http://controller.ucsf.edu/fin_systems/PS92upgrade.asp</u>

Known Issues:

- Navigation to the Employee Composite form or to the Compensation by DFP report: When planners navigate to the individual employee composite form from another form, they may not be brought directly to the chosen employee. Likewise, when planners navigate to the Compensation by DFP report from the Revenue and Expense form, they may not be directly to the chosen DFP. The resolution is being tested; please stay tuned for more information.
- Employee Landing Form: The 2016-17/Plan/Base&Neg Dist (%) column on the "Empl Landing Page" form may be missing the distribution percentages that were entered for employees. There is no impact to the integration of employee data to General Planning or any other employee forms or reports. This issue is under investigation.

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• Search Individual Empl form in Smart View only: Due to an Oracle bug, when planners use the Search Individual Empl form in Smart View to submit data, they are prompted to select and enter the Employee ID in order to submit the data successfully. A work-around is to use the Search Individual Empl form in the web, which does not require planners to select the employee. This issue will not be resolved until Oracle releases the fix in the next patch.

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• Search Individual TBH form in Smart View only: Similar to the Search Individual Employee form in Smart View issue (please see above), when planners use the Search Individual TBH form in Smart View to submit data, they are prompted to select and enter the TBH in order to submit the data successfully – this is a known Oracle bug. A work-around is to use the Search Individual TBH form in the web, which does not require planners to select the TBH. This issue will not be resolved until Oracle releases the fix in the next patch.

Bug Fixes and Enhancements:

 New Account Detail by DFP: Planners now have the ability to drill down to the "Account Detail by DFP" report to view the planning-level DFPs for a particular Account from any DFP level in the Revenue and Expense – Level C/E forms. This new feature allows planners to quickly view the detailed amounts for an Account at a higher level DFP.

To access the Account Detail by DFP:

- 1. Go to General Planning ->Revenue and Expense Level C/E
- 2. Select and go to DFP at any level. For example, D100000-Total Funds-Total Projects
- 3. Right-click on the desired account and select Account Detail by DFP
- 5. The report will appear showing all the DFP that has data for that specific account chosen.

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• General Planning Global Assumptions: When seeding Year 1 and 2, the Global Assumptions calculations in General Planning now include Accounts **5300C: Occupancy Expense** and **5320C: Utilities** in the seeding rules. UPlan Job Aid 209 has been updated to reflect the change.