UPlan Weekly Digest

Friday, April 1, 2016

Announcements:

- PeopleSoft Financial System Upgrade: The UPlan nightly load processes related to certain chartfield updates has resumed with the PeopleSoft 9.2 upgrade that went live on Monday, March 28th. 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>
- Employee SOM Seeding Rules Run for Year 1 and 2: The Employee Seeding rules for SOM for Year 1 and 2 were run Friday, March 24. This allows planners to accurately plan distributions for employees with Home DeptIDs below D100000. If you have distribution percentages for these employees, these seeding rules may have updated the salary and benefit dollars that flow to General.
- Upgrade to the newest version of Smart View: Oracle released a new version of Smart View that includes minor improvements back in March. If you haven't already done so, 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 March 4th Weekly Digest.

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 Training Manuals and Job Aids: Several of the training materials have been updated for Spring 2016 at https://brm.ucsf.edu/uplan-training-and-job-aids.

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 Report: As of March 18th, planners are able 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 report:

- 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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