UPlan Weekly Digest

**Friday, April 29, 2016**

Announcements:

- There are two new pages on the UPlan website that list Known Issues and Enhancements from this Weekly Digest. New issues and enhancements will continue to be announced through the Weekly Digest and old information will move to the web pages after two weeks.
    - o Enhancements: http://brm.ucsf.edu/uplan-enhancements
   - o Known Issues: http://brm.ucsf.edu/uplan-known-issues

Tips & Tricks:

- Have you checked which version of Firefox you have and if your preferred browser is compatible with UPlan? If not, be sure to do so if you haven't logged in to UPlan in a while. There are two job aids available to reference - UPlan 201: Browser Setting for PC and UPlan 202: Browser Setting for Mac on the UPlan Training and Job Aids page.

- In March 2016, a new version of Smart View and updated URL was released to access UPlan. Check out the main UPlan page under Tips and Tricks to see if your version of Smart View has been updated and if you are using the correct link.

Bug Fixes and Enhancements:

- **RESOLVED – General Global Assumptions % when Seeding Year 2:** The global assumptions rule was incorrectly applying the global assumptions % twice and was resolved on Monday, April 18th. If you seeded with global assumptions for Year 2 prior to April 18th, you can either:
    - o re-seed Year 2; or
    - o Verify that your numbers are correct for the seeded DFPs.

  To reference the account/fund/project use global assumptions matrix, see UPlan Job Aid 209.

- **NEW - Drill Through for Historical Forecast Detail:** Drill Through has been implemented in the Forecast Working column to see historical monthly forecast snapshots sent to MyReports on the 14th calendar day starting with the February and March 2016 forecasts (April is coming soon). To view the historical snapshot from any DFP:
    - o **In UPlan Web:** click any intersection in Forecast Working with a triangle > navigate to the UPlan Edit > Drill Through > Feb/Mar/Apr Forecast.
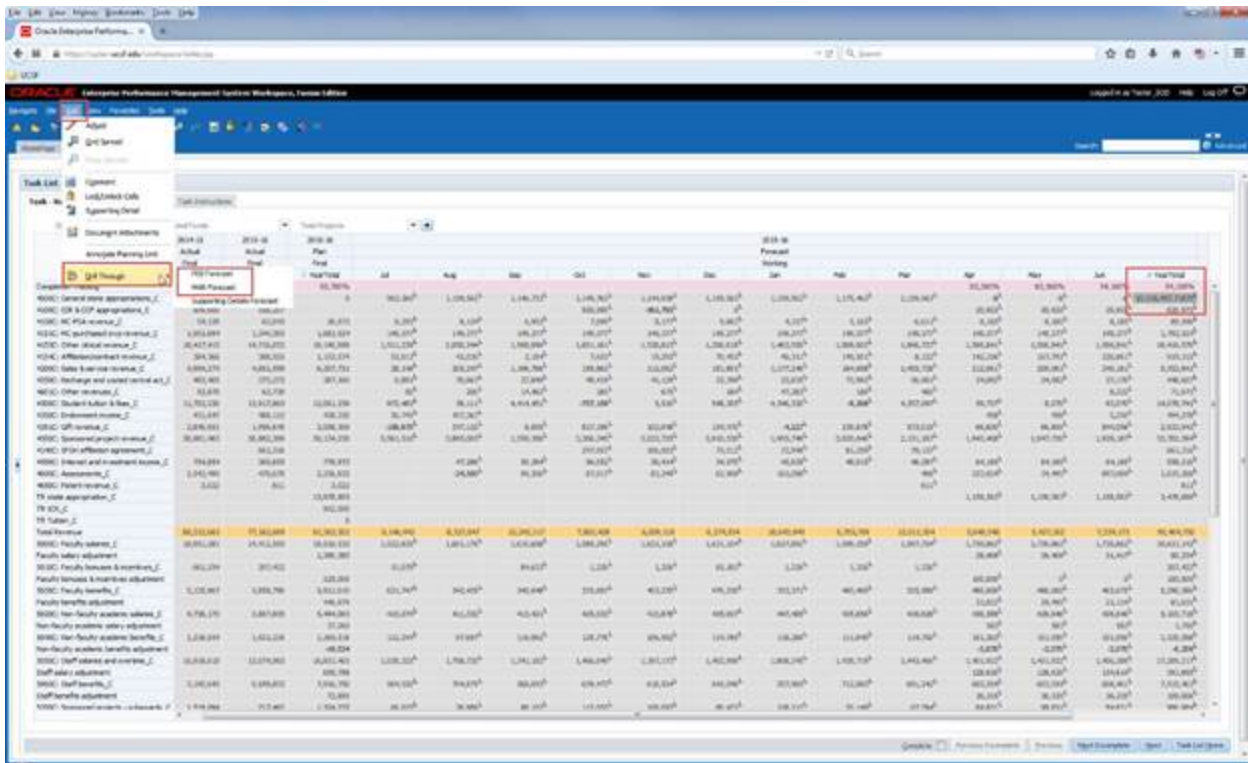
- o **In Smart View:** Planners have two options to view the detail:
  1. Click any intersection in Forecast Working with a green border > navigate to the Planning ribbon > Drill Through > Feb/Mar/Apr Forecast
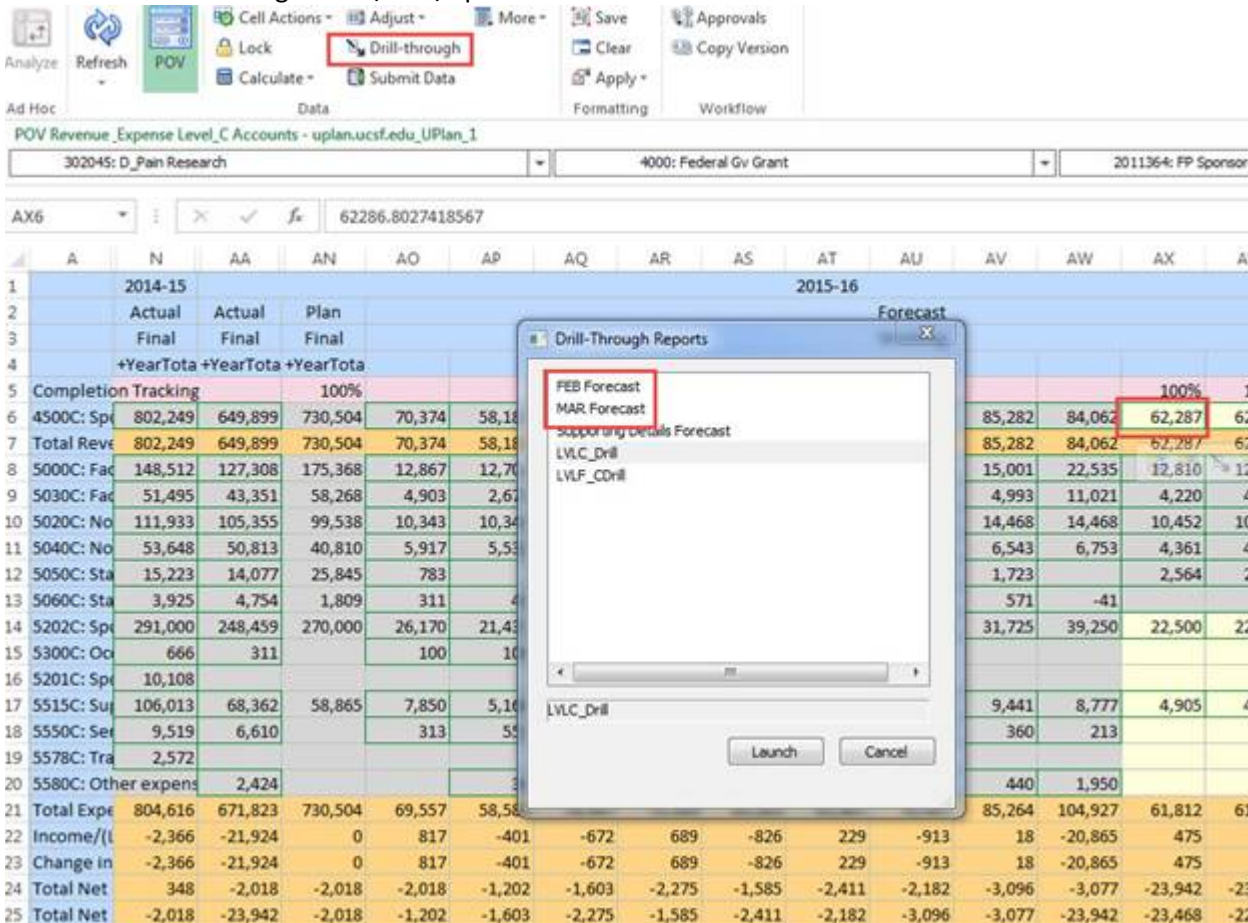
2. Right-click on any intersection in Forecast Working with a green border > Smart View > Drill Through > Feb/Mar/Apr Forecast
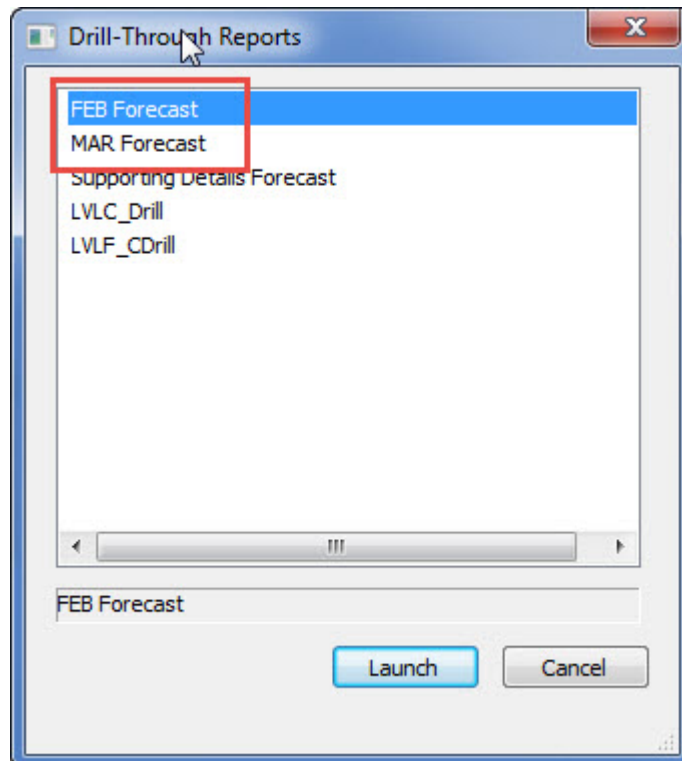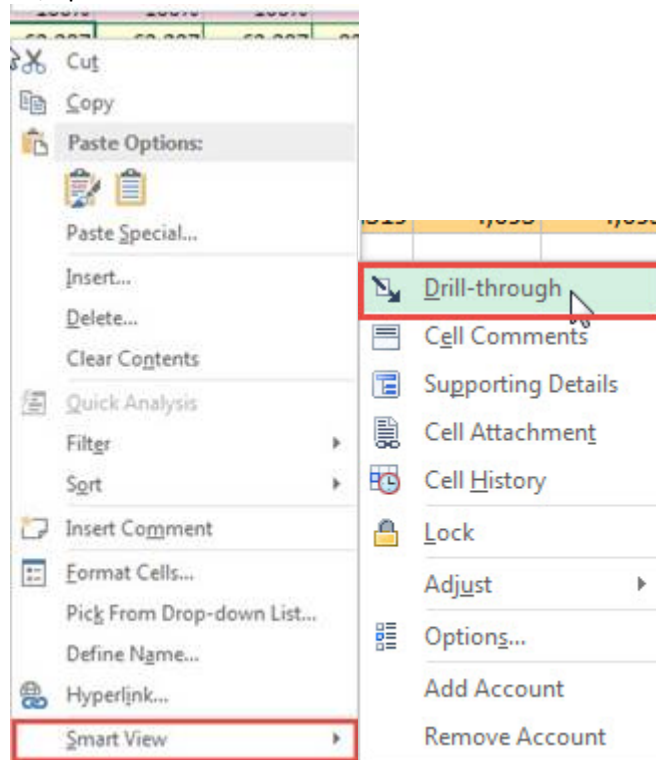
- **NEW - Drill Through for "Planning by Project" Detail:** Drill Through has been implemented in Actual Final and Forecast/Plan Working to see ProjectID level detail for projects below "FP Projects" in the UPlan project hierarchy. This enables planning by individual project IDs for sponsored, recruitment, retention and other faculty/PI/owner activity projects. A new training manual has been created and there will be three webinars to demo how to use the new features next week. See the announcements section for webinar details.
  - o **In UPlan Web:** Drill Through is enabled in the Actual Final and Forecast/Plan Working columns on the R&E forms. Intersections allowing drill through have two black lines creating a triangle in the upper-

right corner. To view the detail, click any intersection with this triangle > navigate to the UPlan Edit > Drill Through > Lvl C/E or F Drill.

- In Smart View: Drill Through is enabled in the Actual Final and Forecast/Plan Working columns on the R&E forms. Intersections allowing drill through have green border lines.
  Planners have two options to view the detail:
  1. Click any intersection with a green border > navigate to the Planning ribbon > Drill Through > Lvl C/E or F Drill

2. Right-click on any intersection with a green border > Smart View > Drill Through > Lvl C/E or F Drill

- **NEW - Drill Through for Supporting Details Forecast:** Drill Through has been implemented in Forecast/Plan Working columns in the R&E Forms to see instantaneous reports of supporting detail when planning by project on planning-level DFPs. Navigation to view the drill through for supporting details is similar to the Drill Through for historical forecast and planning by project. A new training manual has been created and there will be three webinars to demo how to use the new features. See the announcements section for webinar details.

Known Issues:

- **NEW - Drill Through unavailable through Excel 2010 (Smart View) when Firefox is default browser:** If you are using Smart View to use the Drill Through functionality and your default browser is FireFox you will encounter an error. There are multiple workarounds to this issue:
    - Use UPlan web to use Drill Through > Export to Excel if need to copy/paste to Smart View; or
    - Change your default browser to Internet Explorer by opening IE > Tools > Internet Options > Programs > click Make Default > click Ok > close IE; or
    - Upgrade to Microsoft Office 2013. Ask your local IT unit to install MS 2013 on your PC.

- **Salary and Benefit Distributions for Lateral Transfers:** There is an issue with the distribution dollar calculation for employees with lateral transfers but a different salary level (i.e. same title code, different salary) from one Home DeptID to another Home DeptID. The dollars are currently incorrectly calculating from the old Home DeptID salary level. We are investigating this issue.

- **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. There is an Oracle bug associated with the proposed resolution so this issue will not be resolved until Oracle releases the fix in the next patch.

- **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 continues to be under investigation though seems to have impacted only one DeptID.

- **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.

- **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.