UPlan Weekly Digest

Friday, May 6, 2016

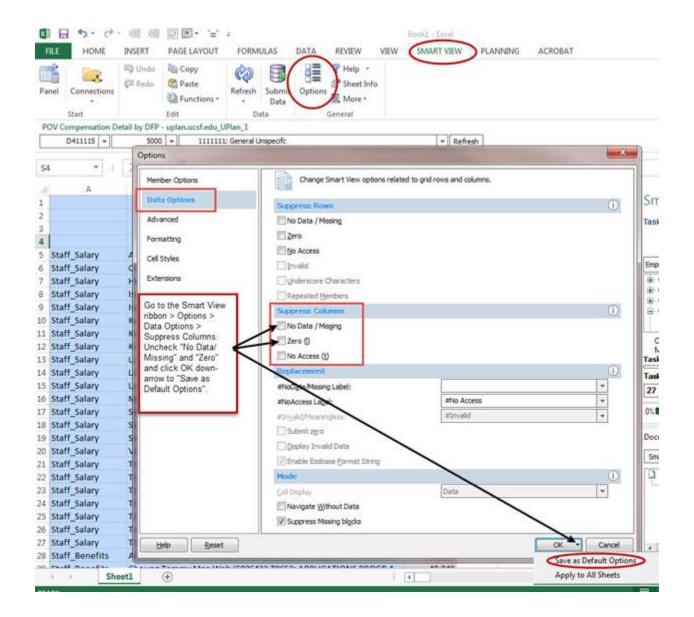
Announcements:

- **Employee Year 2 Planning:** Year 2 detailed data is now available in all forms and reports in the Employee Planning module under "My Task List/Employee Planning". See the "Bug Fixes & Enhancements" section below for more information.
- There are two new pages on the UPIan 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: <u>http://brm.ucsf.edu/uplan-enhancements</u>
 - o Known Issues: <u>http://brm.ucsf.edu/uplan-known-issues</u>

Tips & Tricks:

 Are columns missing from forms and form reports when you are working in Smart View? You may have your Smart View options set to suppress columns with no data. To unsuppress the columns, go to the Smart View ribbon > Options > Data Options > Suppress Columns. Then uncheck "No Data/ Missing" and "Zero", click on the OK down-arrow to "Save as Default Options", and refresh the form to show the previously suppressed columns. See the below screenshots:

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- 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 <u>main</u> <u>UPlan page</u> 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 & Enhancements:

- **NEW Employee Year 2 Planning:** Year 2 Plan Working (i.e. 2017-18) is now available in all data entry forms and reports in Employee Planning. Planners have the ability to view and edit Year 2 data as needed. Prior to this enhancement, salary and benefits distribution data for Year 2 flowed "behind the scenes" to General Planning upon seeding/integrating Year 2 employee data. Note that while seeding Year 2 for employee data is still highly recommended for streamlining workload processes, Control Points and planners have the option to plan directly in Year 2 without seeding. Please contact your Control Point Coordinator if you have questions on seeding for Year 2.
- Reference the <u>UPlan Enhancements</u> page for a complete list of enhancements relevant to this fiscal year.

Known Issues:

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