

UPlan Weekly Digest

Friday, May 13, 2016

Announcements:

- **To Be Hired (TBH) Employee Names:** Planners now have the ability to name their TBH's upon adding the TBH in the Employee Planning module. See the "Bug Fixes & Enhancements" section below for more information.
- **RESOLVED - UPlan Website Security:** Some planners were receiving a message regarding website security or server authentication when accessing UPlan via web (Firefox, IE) and Smart View before and/or after installing the BigFix IT update. This has been resolved but please contact uplan@ucsf.edu if you are still experiencing this issue.

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:

The screenshot shows an Excel spreadsheet with a data table. The table has columns A through S. The data is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1						2015-16													
2						Forecast													
3						Working													
4						+YearTotal													
5	Staff_Salary															129,722			
6	Staff_Salary															119,617			
7	Staff_Salary															122,676			
8	Staff_Salary															90,254			
9	Staff_Salary															0			
10	Staff_Salary															122,471			
11	Staff_Salary															85,700			
12	Staff_Salary															110,931			
13	Staff_Salary															148,800			
14	Staff_Salary															132,074			

The Smart View ribbon is visible on the right side of the spreadsheet. The ribbon has the following options: Task List, Server: uplan.ucsf.edu, Application: UPlan, Employee Planning, 6.0 Empl PP Feed, 7.0 Empl Reports, 7.1 Compensation Detail by DFP, 7.2 Multi-Empl Distr Pct and \$, 8.0 Push Empl Data to General, Open Form, Mark Complete, Task Details, and Task List.

Book1 - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW SMART VIEW PLANNING ACROBAT

Panel Connections Undo Copy Paste Functions Refresh Submit Data Options Help Sheet Info More

Start Edit Data General

POV Compensation Detail by DFP - uplan.ucsf.edu_UPlan_1

D411115 5000 1111111: General Unspecif Refresh

S4

Options

Member Options

Data Options

Advanced

Formatting

Cell Styles

Extensions

Change Smart View options related to grid rows and columns.

Suppress Rows

No Data / Missing

Zero

No Access

Invalid

Underscore Characters

Repeated Members

Suppress Columns

No Data / Missing

Zero (0)

No Access (0)

Replacement

#NoData Missing Label: []

#NoAccess Label: [#No Access]

#Invalid/Meaningless: [#Invalid]

Submit zero

Display Invalid Data

Enable Essbase Format String

Mode

Cell Display [Data]

Navigate Without Data

Suppress Missing blocks

Help Reset OK Cancel

Save as Default Options

Apply to All Sheets

Go to the Smart View ribbon > Options > Data Options > Suppress Columns. Uncheck "No Data/Missing" and "Zero" and click OK down-arrow to "Save as Default Options".

Book1 - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW SMART VIEW PLANNING ACROBAT

Panel Connections Undo Copy Paste Functions Refresh Submit Data Options Help Sheet Info More

Start Edit Data General

POV Compensation Detail by DFP - uplan.ucsf.edu_UPlan_1

D411115 5000 1111111: General Unspecif Refresh

S4

Click refresh to show the columns that were missing.

	A	B	C	P	AQ	AP	AQ	AR
1				2015-16	2016-17	2017-18		
2				Forecast	Plan	Plan		
3				Working	Working	Working		
4				+YearTotal	+YearTotal	+YearTotal		
5	Staff_Salary			129,722				
6	Staff_Salary			119,617				
7	Staff_Salary			122,676				
8	Staff_Salary			90,254				
9	Staff_Salary			0				
10	Staff_Salary			122,471				
11	Staff_Salary			85,700				
12	Staff_Salary			110,931				
13	Staff_Salary			148,800				
14	Staff_Salary			132,074				
15	Staff_Salary			120,290				
16	Staff_Salary			84,042				
17	Staff_Salary			121,683				
18	Staff_Salary			-932				
19	Staff_Salary			173,004				

Smart View

Task List

Server: uplan.ucsf.edu
Application: UPlan

Employee Planning

- 4.0 Empl Global Assumptions
- 5.0 Empl Seding Options
- 6.0 Empl FP Feed
- 7.0 Empl Reports
- 7.1 Compensation Detail by DFP

Open Form
Mark Complete

Task Details

Task List

27 Total: 27

0% Complete Overdue

Document Contents

- b. To add a new TBH, navigate to the TBH Landing Page form > choose your MyOrg DeptID > right-click anywhere on the form > choose “Add TBH”. This will bring up a prompt for you to create the new TBH.

Prompt Text	Value
* TBH Name	
* 1:Select a Title Code	NoTitleCode
* 1:Select DeptID	D
* 1:Select Year	FY17
* 1:Select the Planning Scenario	Plan
* 1:Select the Planning Version	Working
* 1:Enter the Hire Date	7/1/16
* 1:Enter the Total FTE	1
* 1:Enter the Total Headcount	1
* 1:Select the Grade/Step	NoGradeStep
* 1:Enter Base/Weg Salary	75000
* 1:Enter Base/Weg Benefits Adj (%)	25

- The Dynamic TBH functionality has some known gaps that we are currently working with Oracle to address in future patches. Below are the gaps as well as recommended best practices:

 - Add/Delete TBH's outside of planner's DeptID access- We are working with Oracle to address a known issue that allows planners to add and delete TBH's for outside of their access. Please be diligent in reviewing the TBH's that you add or delete to ensure you are working with the correct DeptID(s). If you delete a TBH in error that does not belong to your DeptID, please contact the UPlan team for assistance.
 - All TBH names must be unique - Planners will receive an error if a particular name is already taken. Please follow the guideline indicated by your Control Point. For example, your Control Point may have you preface your TBH name with certain text such as "F_..." for FAS and "D_..." for SOD.
 - Correct Year and Scenario combination – When creating TBH's, the correct Year and Scenario combination must be entered in the Add Dynamic TBH prompt (e.g. FY16/Forecast, FY17/Plan, FY18/Plan). If the prompt is launched with the wrong Year and Scenario combination, planners will receive an error message but the TBH member name is created in the backend. Planners will not be able to recreate the TBH with the same name until the member name is deleted by the UPlan team. If this occurs, please contact the UPlan team to delete the TBH.
 - Use of some special characters could create some issues in Smart View Essbase for ad hoc reporting - Please avoid having spaces before/after a dash (-), using back slashes (/), or using forward slashes (\).
 - Smart View Essbase - The new TBH name will not be reflected in Essbase ("UPlan-Empl" or "EmplRpt") for ad hoc reporting until the next day.
- 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 [UPlan Enhancements](#) page for a complete list of enhancements relevant to this fiscal year.

Known Issues:

- Reference the [UPlan Known Issues](#) page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under “Bug Fixes & Enhancements.”