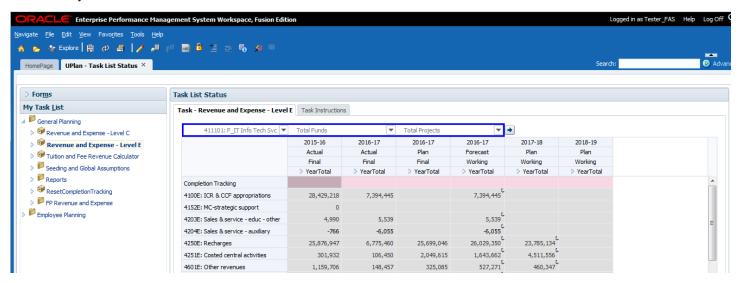
## **UPlan Weekly Digest**

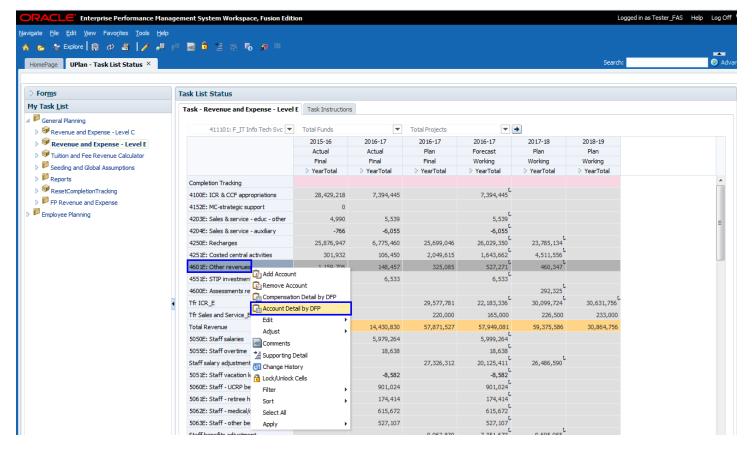
Friday, October 28, 2016

## **Bug Fixes & Enhancements:**

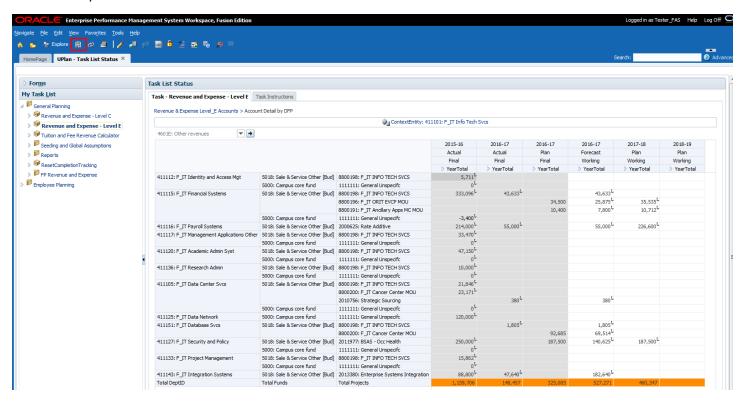
- NEW Account Detail by DFP form now writeable: Planners are now able to plan for multiple DFPs at the same time in the Account Detail by DFP form. The form can be accessed by right-clicking on your Revenue and Expense form and selecting Account Detail by DFP. For fastest results, do the following:
  - 1. Set the DFP at **the highest level** for your department, or the highest level you are responsible for planning. For example, if you are the planner for ITS, set the DFP to: 411101: F\_IT Info Tech Svcs-Total Funds-Total Projects.



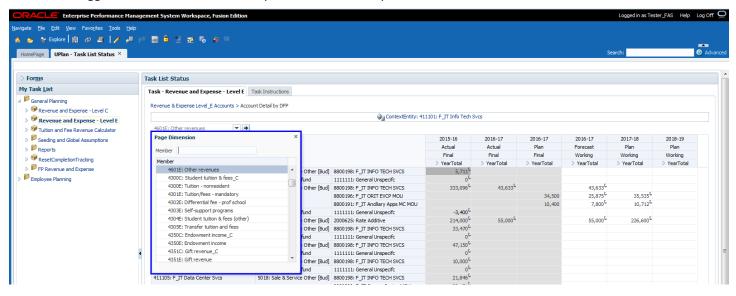
2. Right-click on the account you wish to modify.



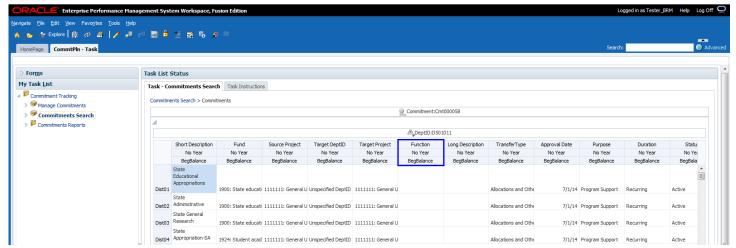
3. All DFPs under the top level you specified show up for that account. Plan for multiple DFPs at a time. Save in web / Submit in Smart View.



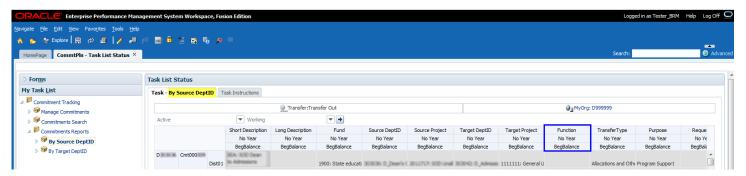
4. Toggle to a different account to plan for other multiple DFPs at the same time.

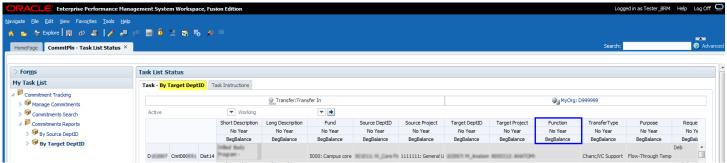


• **NEW - Function Code now available in CommtPln:** Planners can now plan by Function Code for each distribution in a commitment. The Function column appears between Target Project and Long Description in the Edit Existing Commitment Form.

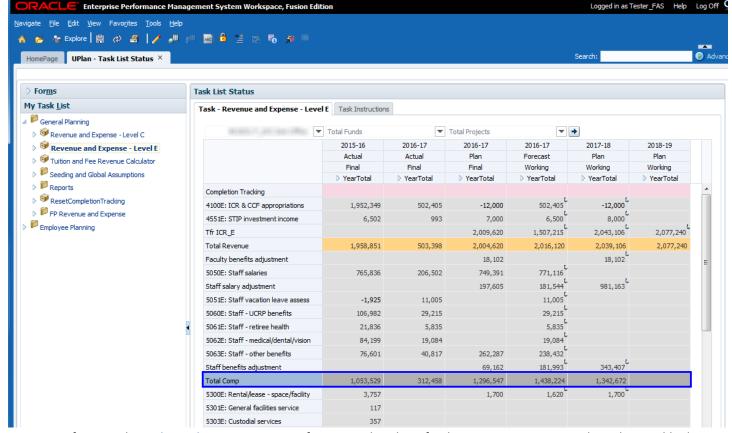


It also appears in the By Source DeptID and By Target DeptID Commitment reports.





• **NEW - Total Comp account now available in Revenue & Expense Form-Level E:** FAS Planners are now able to view Accounts 5000E through Staff benefits adjustment as an aggregate Salaries and Benefits Total for Faculty, Non-faculty academic and Staff directly on the Revenue & Expense form.



Reference the <u>UPlan Enhancements</u> page for a complete list of enhancements announced via the weekly digest.

## **Known Issues:**

- UPDATE Employee FP Feed to UPlan not showing data for April 2018-June 2018: Payroll has updated the internal payroll processing calendar up to March 2018. This means there is no FP Employee data to copy into UPlan between April 2018-June 2018. We will notify Planners when FP data populates in UPlan for April 2018-June 2018.
- 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 be announced under "Bug Fixes & Enhancements".

## **Tips & Tricks:**

• **Don't double-plan for Commitments:** Commitment numbers roll into General Planning via TFR accounts. Don't make the mistake of double planning for your Commitments by entering your Commitment Revenue in your Revenue and Expense form. If you notice Tfr data are incorrect, correct the numbers in the CmmtPlan application.