

# UPlan

## Pre Training for New Users

Spring 2016

**UPlan 101a:** The UPlan 101a course has been eliminated, since much of the content was related to the launch of Finance3. Instead, a UPlan overview slide deck is available called UPlan 101a. New planners are asked to review the slide deck, including the slide notes, prior to attending classroom training.

**UPlan 101b:** The recorded version of UPlan 101b is still available through the UCSF Learning Management System. New planners are asked to complete this brief recorded presentation prior to attending classroom training.

### UPlan 101b – Corrections

UPlan 101b was recorded during December 2013. Since that time, several changes to the UPlan system as well as UCSF Chart of Accounts have occurred. Following are corrections to UPlan 101b.

- **New interface** as of January 2016. UPlan is now running the latest version of Oracle Hyperion Planning which has a slightly different color scheme than the screen shots.
- **Slide 12** indicates that planning is allowed on a year, quarterly, or monthly basis. As of January 2015, planning is no longer enabled by quarter. Users may still plan on a monthly basis or by year total. This change was made to reduce the amount of clicking on data entry forms.
- **Slide 13** indicates that planners can expand the YearTotal column to show quarters. As mentioned above, this is no longer an option on UPlan planning forms. Expansion of YearTotal will show all months of the year immediately.
- **Slide 14** indicates that the Scenario dimension has six dimensions, including four quarterly forecasts. As of January 2015, the quarterly forecasts have been consolidated into a single Forecast scenario that contains actuals for closed months and forecasted transactions for the remaining months of the year. Thus, there are now three scenario members: Actual, Plan, and Forecast.
- **Slides 51 through 53** discuss the training plan during Spring 2014. Ignore these slides.
- **Slide 54** covers operating systems and browsers. Planners should visit the UPlan website ([brm.ucsf.edu/uplan](http://brm.ucsf.edu/uplan)) for the latest information about supported browsers.