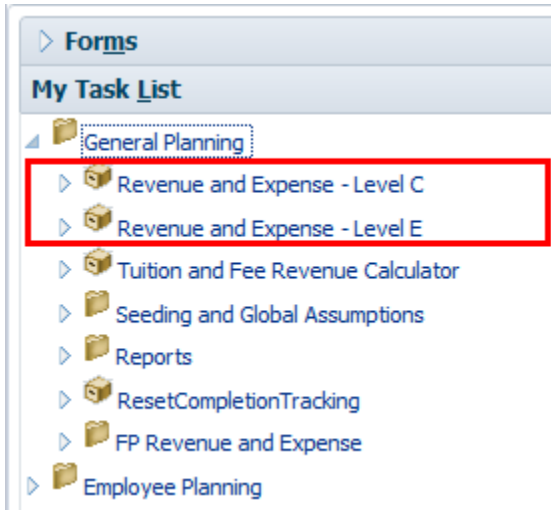


# UPlan Weekly Digest

Friday, March 10, 2017

## Bug Fixes & Enhancements:

- **NEW – Add and Remove DFP Rows:** Planners now have the ability to add and remove blank DFP rows in the “Account Detail by DFP” form. This new feature allows planners to create and plan for new DFP’s within the form and eliminates the need to navigate back to the “Revenue and Expense – Level C/E” form to plan for new DFP combinations.
- **To add a DFP**
  1. Navigate to My Task List > General Planning > Revenue and Expense – Level C/E.



2. Right-click on the account you want to add a DFP to and choose “Account Detail by DFP.”

Task - Revenue and Expense - Level C Task Instructions

Total Funds Total Projects

Account	2015-16	2016-17	2016-17	2016-17	2017-18	2018-19
	Actual	Actual	Plan	Forecast	Plan	Plan
	Final	Final	Final	Working	Working	Working
	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
Completion Tracking						
4000C: General state appropriations_C			-673,795	-280,748 <sup>t</sup>		
4100C: ICR & CCF appropriations_C			-19,355	-8,064 <sup>t</sup>		
4150C: MC-PSA revenue_C			-3,712,095	-1,546,706 <sup>t</sup>		
4151C: MC-purchased svcs revenue_C			953,486	397,286 <sup>t</sup>		
4152C: MC-strategic support_C			5,430,909	2,262,879 <sup>t</sup>		
4153C: Other clinical revenue_C			15,077,251	6,282,188 <sup>t</sup>		
4154C: Affiliation/contract revenue_C			-1,360,684	-566,952 <sup>t</sup>		
4200C: Sales & service revenue_C			4,801,926	2,000,802 <sup>t</sup>		
4250C: Recharge and costed central a			-3,240,381	-1,350,159 <sup>t</sup>		
4601C: Other revenues_C			-686,531	-286,055 <sup>t</sup>		
4300C: Student tuition & fees_C			-1,328,776	-553,657 <sup>t</sup>		
4350C: Endowment income_C			-1,948,682	-18,250 <sup>t</sup>		
4351C: Gift revenue_C			-16,388,052	-6,828,355 <sup>t</sup>		
4500C: Sponsored project revenue_C			48,938,823	20,391,176 <sup>t</sup>		
4140C: SFGH affiliation agreement_C			-6,963,754	-2,901,564 <sup>t</sup>		
4550C: Interest and investment incom			550,204	229,252 <sup>t</sup>		
4600C: Assessments_C			-4,282,037	-1,784,182 <sup>t</sup>		
Total Revenue			35,148,457	15,438,892		
5000C: Faculty salaries_C			-31,354,797	-13,064,499 <sup>t</sup>		
5010C: Faculty bonuses & incentives_C			16,815,487	7,006,453 <sup>t</sup>		
5030C: Faculty benefits_C			-8,834,032	-3,680,847 <sup>t</sup>		
5020C: Non-faculty academic salaries_			12,710,318	5,295,966 <sup>t</sup>		
5040C: Non-faculty academic benefits_			1,886,867	786,194 <sup>t</sup>		
5050C: Staff salaries and overtime_C			-6,491,300	-2,704,708 <sup>t</sup>		
5060C: Staff benefits_C			488,396	203,499 <sup>t</sup>		
Total Comp			-14,779,061	-6,157,942		

- Right-click anywhere on the Project column and choose "Add DFP." This will bring up a prompt for you to create a DFP.

**Task - Revenue and Expense - Level C** | Task Instructions

Revenue & Expense Level\_C Accounts > Account Detail by DFP

ContextEntity: [Revenue & Expense Level\\_C Accounts](#)

4200C: Sales & service revenue\_C

			2015-16	2016-17	2016-17	2016-17	2017-18
			Actual	Actual	Plan	Forecast	Plan
			Final	Final	Final	Working	Working
YearTotal			> YearTotal	> YearTotal	> YearTotal	> YearTotal	> YearTotal
2011375: ADJ Affiliations					2,748,995		1,145,415
1000005: SFGH professional fees					188,810		78,671
1111111: General Unspecific					1,251,103		521,293
1000000: UCSF Faculty Prac					613,017		255,424
Total DeptID	Total Funds	Total Projects			4,801,926		2,000,802

Context menu options: Add DFP, Remove DFP, Edit, Adjust, Comments, Supporting Detail, Change History, Attachments, Lock/Unlock Cells, Filter, Sort, Select All, Apply.

**Task - Revenue and Expense - Level C** | Task Instructions

Revenue & Expense Level\_C Accounts > Account Detail by DFP

4200C: Sales & service revenue\_C

**Runtime Prompts - Add\_DFP**

Prompt Text	Value
* Select the DeptID	1111111
* Please select the Fund	1000000
* Please select the Project	11111111

Buttons: Launch, Cancel

- **To remove a DFP**
  1. Verify that the DFP has no data in it.
  2. Right-click anywhere on the Project column and choose “Remove DFP.”

**Task - Revenue and Expense - Level C** | Task Instructions

Revenue & Expense Level\_C Accounts > Account Detail by DFP

ContextEntity: [Revenue & Expense Level\\_C Accounts](#)

4200C: Sales & service revenue\_C

	2015-16	2016-17	2016-17	2016-17	2017-18
	Actual	Actual	Plan	Forecast	Plan
	Final	Final	Final	Working	Working
	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
1000003:					
2011375:			2,748,995	1,145,415 <sup>4</sup>	
1000005:			188,810	78,671 <sup>4</sup>	
1111111:			1,251,103	521,293 <sup>4</sup>	
1000000:			613,017	255,424 <sup>4</sup>	
Total DeptID	Total Funds	Total Proj	4,801,926	2,000,802	

- 1000003: Add DFP
- 2011375: **Remove DFP**
- 1000005: Edit
- 1111111: Adjust
- 1000000: Comments
- Supporting Detail
- Change History
- Attachments
- Lock/Unlock Cells
- Filter
- Sort
- Select All
- Apply

- Reference the [UPlan Enhancements](#) page for a complete list of enhancements relevant to the last 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”.