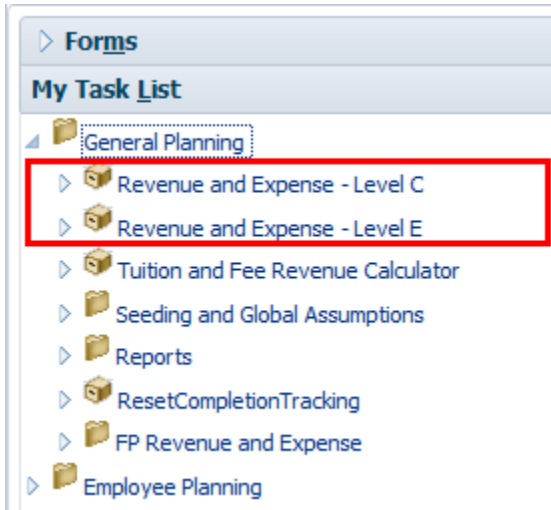


# UPlan Weekly Digest

Friday, March 17, 2017

## Bug Fixes & Enhancements:

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

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
		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

ContextEntity: [REDACTED]

4200C: Sales & service revenue\_C

Total DeptID

**Runtime Prompts - Add\_DFP**

Prompt Text	Value
* Select the DeptID	[REDACTED]
* Please select the Fund	[REDACTED]
* Please select the Project	"1111111"

Launch Cancel

- To remove a DFP
  - Verify that the DFP has no data.
  - 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: \*\*\*\*\*

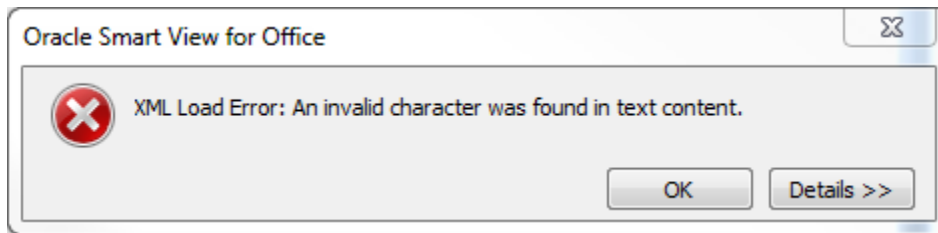
4200C: Sales & service revenue\_C

	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:					
1000005:			2,748,995	1,145,415 <sup>L</sup>	
1111111:			188,810	78,671 <sup>L</sup>	
			1,251,103	521,293 <sup>L</sup>	
1000000:			613,017	255,424 <sup>L</sup>	
Total DeptID	Total Funds	Total Proj	4,801,926	2,000,802	

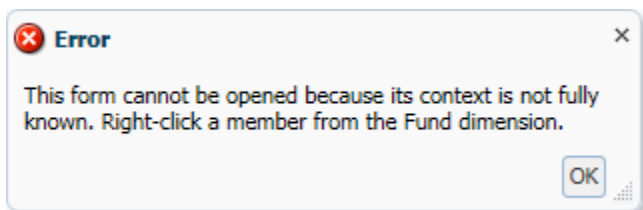
- Reference the [UPlan Enhancements](#) page for a complete list of enhancements relevant to the last fiscal year.

**Known Issues:**

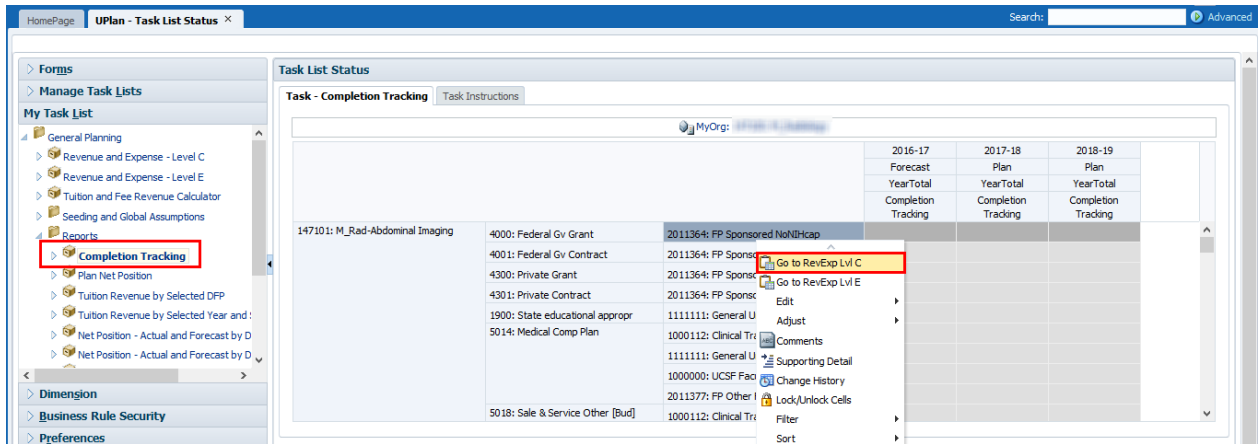
- **Search Individual Employee Form Error Message** – Some planners were receiving a XML Load Error message when navigating to the “Search Individual Empl” form in Smart View. If this occurs, please contact the UPlan team for assistance.



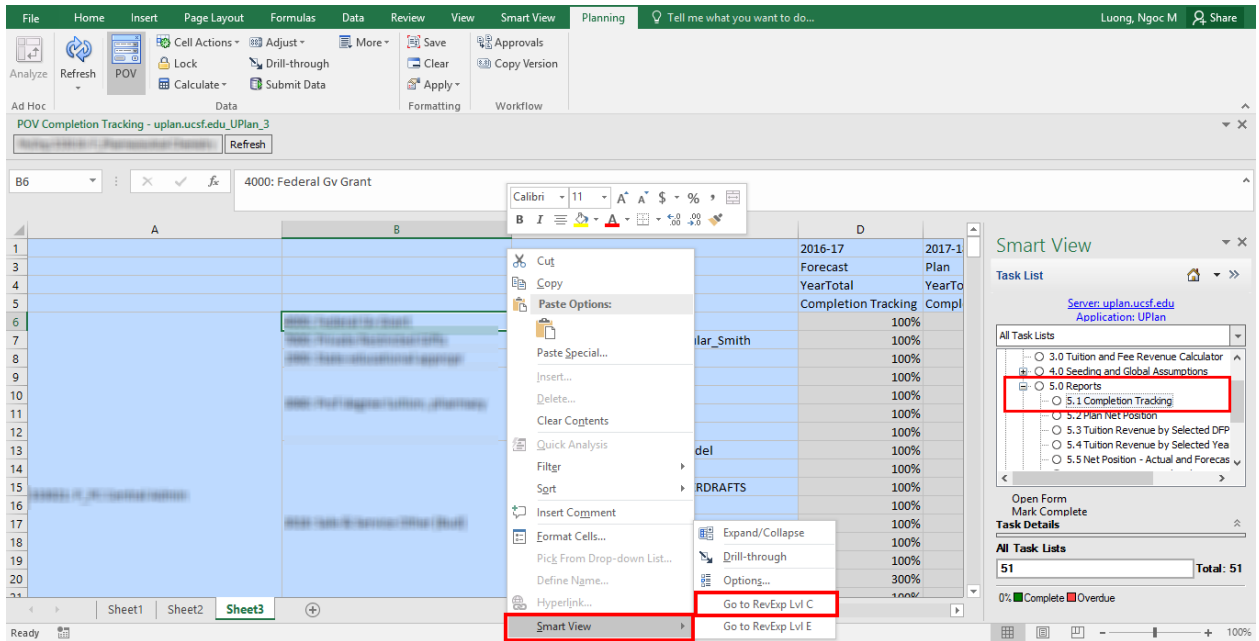
- **Revenue and Expense Form Error Message** – Due to an Oracle bug, some planners were encountering an error message when opening the UPlan Web and Smart View Revenue and Expense form. A one-time workaround is to navigate to the Revenue and Expense form via Completion Tracking. See screenshots below:



○ UPlan Web:



○ Smart View:



- **Benefit % Rates for Additional and Faculty Bonus & Incentive** – The actualized Benefit % rates in closed months for “Addtl Benefits %” and “Fac Bon&Incv (BYZ) Benefits %” are either missing or incorrect for some employees. This issue has no impact to the actualized benefit dollars in Employee or General. We are currently investigating the root cause.

○ Missing Addtl Benefit %:

Task - Search Individual Empl

	2016-17 Forecast Working											
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	
New Base/Neg Salary	64,375	66,306	66,306	66,306	66,306	66,306	66,306	66,306	66,306	66,306	66,306	66,306
Base/Neg Benefits (%)	35%	35%	35%	35%	24%	19%	10%	20%	8%	8%	8%	8%
Addtl Benefits (%)									1%	1%	1%	1%
Base/Neg Benefits Adj (%)												
Base/Neg Benefits (\$)	22,531	23,207	23,207	23,207	15,914	12,598	6,631	13,261	5,305	5,305	5,305	5,305

o Incorrect Fac Bon&Incv (BYZ) Benefits %:

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
New Base/Reg Salary	22,916.67	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917
Base/Reg Benefits (%)	31%	14%	21%	13%	19%	22%	20%	21%	36%	36%
Fac Bon&Incv (BYZ) Benefits (%)				1%		1%	1%	1%		
Base/Reg Benefits Adj (%)										
Base/Reg Benefits (\$)	7,104	3,208	4,813	2,979	4,354	5,042	4,583	4,813	8,250	8,250

- 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”.