

UPlan Weekly Digest

Friday, April 7, 2017

Bug Fixes & Enhancements:

- **Fcst Apprd – Rev & Exp Level C Form** – Forecast Approved Revenue and Expense level C form is now available in UPlan web and Smart View. This version omits the Current Year Actual Final and adds the Current Year Forecast Approved column. Both the current Revenue and Expense level C form and the new Forecast Approved Rev & Exp form are now below a “Revenue and Expense – Level C” folder.

To access the two versions of the Revenue and Expense Level C form, follow the below steps:

- **In UPlan Web:** Navigate to My Task List > General Planning > Revenue and Expense - Level C

Revenue and Expense - Level C form

The screenshot shows the UPlan Web interface. On the left is a 'My Task List' navigation pane with 'Revenue and Expense - Level C' selected. The main area displays the 'Task List Status' for 'Task - Revenue and Expense - Level C'. The table below shows data for various categories across fiscal years 2015-16 to 2018-19. The '2016-17 Actual' column is highlighted with a red box.

	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						
Tfr state appropriation_C						
Total Revenue						
5000C: Faculty salaries_C						
Faculty salary adjustment						
5030C: Faculty benefits_C						
Faculty benefits adjustment						

Fcst Apprd – Rev & Exp Level C form

The screenshot shows the UPlan Web interface for the 'Fcst Apprd - Rev & Exp Level C' form. The 'Task List Status' table is visible, with the '2016-17 Forecast Approved' column highlighted in red.

	2015-16	2016-17	2016-17	2016-17	2017-18	2018-19
	Actual	Plan	Forecast	Forecast	Plan	Plan
	Final	Final	Working	Approved	Working	Working
	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
Completion Tracking						
4000C: General state appropriations_C						
Tfr state appropriation_C						
Total Revenue						
5000C: Faculty salaries_C						
Faculty salary adjustment						
5030C: Faculty benefits_C						
Faculty benefits adjustment						

- **In Smart View:** Navigate to Smart View ribbon in Excel > click on the Panel button > Shared Connections > Select Server to proceed drop down menu > Select Oracle Hyperion Planning, Fusion Edition – Prod > Expand uplan.ucsf.edu > UPlan > Task Lists > General Planning > 1.0 Revenue and Expense – Level C folder

1.1 Revenue and Expense - Level C form

POV **Revenue Expense Level C Accounts** - uplan.ucsf.edu_UPlan_1

1900: State educational appropr 1111111: General Unspecific Refresh

A1

	N	AA	AN	BA	BN	CA	CB	Cc
2015-16	2016-17		2017-18	2018-19				
Actual	Actual	Plan	Forecast	Plan	Plan			
Final	Final	Working	Working	Working	Working			
+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal		
Completion Tracking		100%		100%	100%			
4000C: General state appropriations	1,154,627	722,439	-118,100	722,439	150,024	164,824		
Tfr state appropriation_C			1,162,533	360,158	1,092,424	1,100,421		
Total Revenue	1,154,627	722,439	1,044,433	1,082,596	1,242,448	1,265,245		
5000C: Faculty salaries_C	665,104	272,914	517,239	436,386	765,899	783,617		
5030C: Faculty benefits_C	209,301	83,330	111,216	127,061	221,584	224,081		
5050C: Staff salaries and overtime_C	186,616	115,933	280,436	163,652	144,340	148,670		
5060C: Staff benefits_C	86,127	55,364	129,203	76,510	71,250	73,387		
Total Comp	1,147,147	527,541	1,038,095	803,609	1,203,072	1,229,754		
5550C: Services_C	7,480	5,880	13,912	7,444	39,375	35,491		
5580C: Other expenses_C			0	0	0	0		
Total Non Comp	7,480	5,880	13,912	7,444	39,375	35,491		
Total Expense	1,154,627	533,421	1,052,007	811,053	1,242,447	1,265,245		
Income/(Loss) from Operations	0	189,017	-7,574	271,543	0	0		
Change in Net Position	0	189,017	-7,574	271,543	0	0		
Total Net Position - Beginning of Period	0				271,543	271,544		
Total Net Position - End of Period	0	189,017	-7,574	271,543	271,544	271,544		

Smart View

Task List

Server: uplan.ucsf.edu
Application: UPlan

General Planning

- 1.0 Revenue and Expense - Level C
 - 1.1 Revenue and Expense - Level C
 - 1.2 Fcst Apprd - Rev & Exp Level C
- 2.0 Revenue and Expense - Level E
- 3.0 Tuition and Fee Revenue Calculator
- 4.0 Seeding and Global Assumptions
- 5.0 Reports
- 6.0 ResetCompletionTracking
- 7.0 ED Revenue and Expense

Open Form
Mark Complete

Task Details

Task List

26 Total: 26

0% Complete Overdue

1.2 Fcst Apprd – Rev & Exp Level C form

POV **Fcst Apprd-Rev_Exp Level C Accounts** - uplan.ucsf.edu_UPlan_1

1900: State educational appropr 1111111: General Unspecific Refresh

A1

	N	AA	AN	BA	BN	CA	CB	Cc
2015-16	2016-17		2017-18	2018-19				
Actual	Plan	Forecast	Plan	Plan	Plan			
Final	Final	Working	Approved	Working	Working			
+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal		
Completion Tracking		100%		100%	100%	100%		
4000C: General state appropriations	1,154,627	-118,100	722,439	272,242	150,024	164,824		
Tfr state appropriation_C			1,162,533	360,158	1,092,424	1,100,421		
Total Revenue	1,154,627	1,044,433	1,082,596	1,082,596	1,242,448	1,265,245		
5000C: Faculty salaries_C	665,104	517,239	436,386	556,745	765,899	783,617		
5030C: Faculty benefits_C	209,301	111,216	127,061	135,197	221,584	224,081		
5050C: Staff salaries and overtime_C	186,616	280,436	163,652	266,395	144,340	148,670		
5060C: Staff benefits_C	86,127	129,203	76,510	113,769	71,250	73,387		
Total Comp	1,147,147	1,038,095	803,609	1,072,106	1,203,072	1,229,754		
5550C: Services_C	7,480	13,912	7,444	10,345	39,375	35,491		
5580C: Other expenses_C		0	0	0	0	0		
Total Non Comp	7,480	13,912	7,444	10,345	39,375	35,491		
Total Expense	1,154,627	1,052,007	811,053	1,082,451	1,242,447	1,265,245		
Income/(Loss) from Operations	0	-7,574	271,543	146	0	0		
Change in Net Position	0	-7,574	271,543	146	0	0		
Total Net Position - Beginning of Period	0				271,543	271,544		
Total Net Position - End of Period	0	-7,574	271,543	146	271,544	271,544		

Smart View

Task List

Server: uplan.ucsf.edu
Application: UPlan

General Planning

- 1.0 Revenue and Expense - Level C
 - 1.1 Revenue and Expense - Level C
 - 1.2 Fcst Apprd - Rev & Exp Level C
- 2.0 Revenue and Expense - Level E
- 3.0 Tuition and Fee Revenue Calculator
- 4.0 Seeding and Global Assumptions
- 5.0 Reports
- 6.0 ResetCompletionTracking
- 7.0 ED Revenue and Expense

Open Form
Mark Complete

Task Details

Task List

26 Total: 26

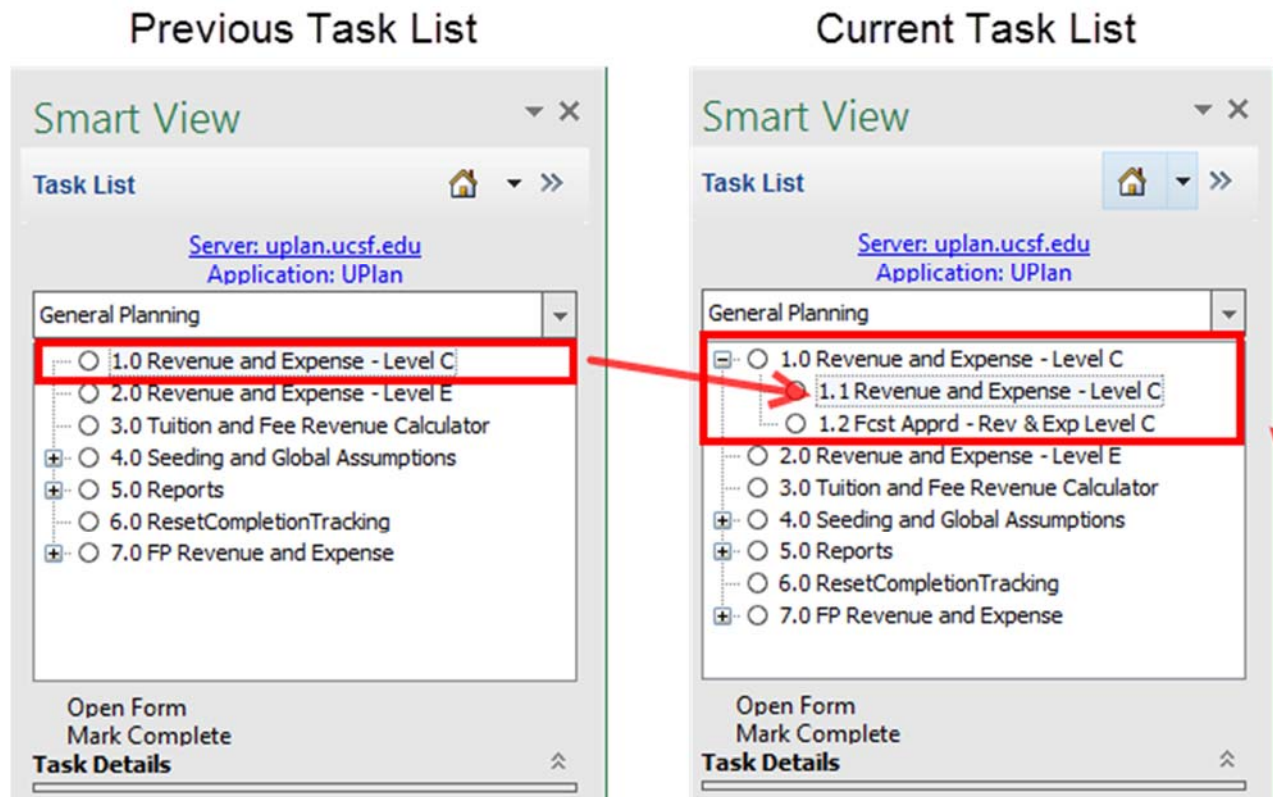
0% Complete Overdue

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

Known Issues:

- Saved Smart View Workbook Cannot Connect to the Revenue and Expense – Level C Form:** If you try to connect a saved Smart View workbook to the Revenue and Expense – Level C form, you will encounter an error. The reason is when we modified the Task List to include the Forecast Approved Revenue and Expense Level C

form, the Task List automatically changed a different number next to the Revenue and Expense Level C form's name. As a result, this changes the path of where the form was originally saved.



The workaround is to either:

- Reload each worksheet from the Smart View panel on the right by connecting to 1.1 Revenue and Expense – Level C or 1.2 Fcst Apprd – Rev & Exp Level C Form > Change POV to match the DFP in the worksheet name > Refresh. (As a reminder this would erase any saved formulas in your worksheet unless you copy/pasted them out and back after refreshing the form).
 - Recreate all workbooks/worksheets from scratch, copy/pasting any formulas you may have saved.
- 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”.