

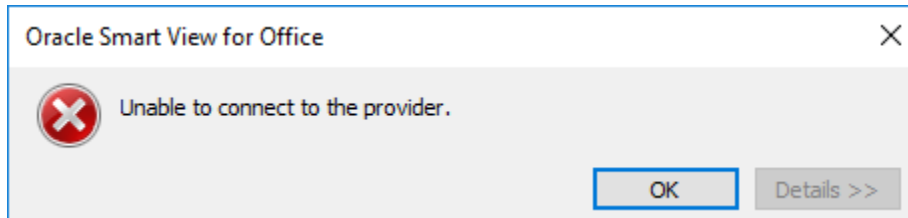
UPlan Weekly Digest

Friday, August 4, 2017

Announcements:

- **ALERT - Connection/Access Issues:**

- Planners are receiving an error and unable to connect to the Oracle Essbase server in Smart View. We are investigating the issue and will follow up once the issue is resolved.



- Some users have reported slowness and/or access issues with UPlan starting from yesterday afternoon. This issue is currently under investigation with IT. We will send a separate email update when more details are known.

- **New Version of Smart View:** There is a new version of Smart View available for download on the UPlan website.

To get started:

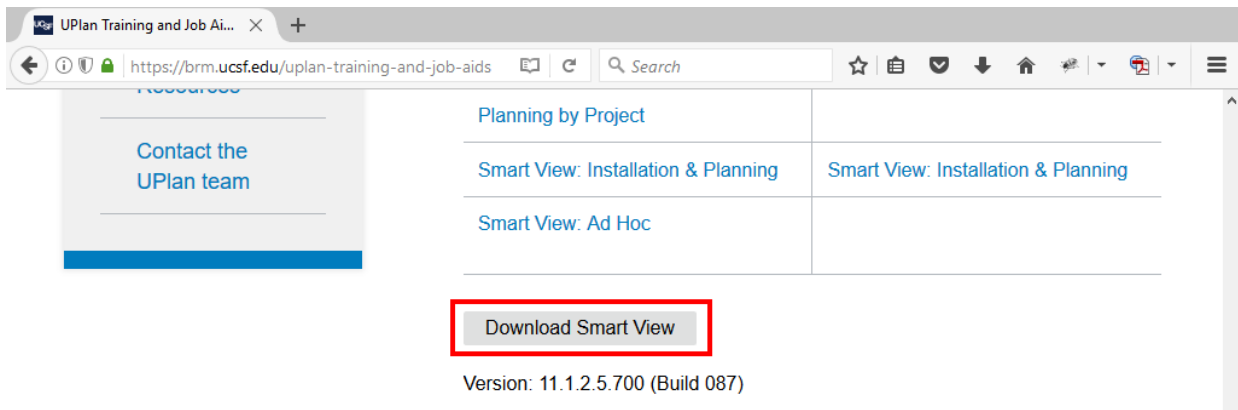
1. Confirm you have admin access to your machine. If you do, skip to Step 2. If you do not, you will be unable to download Smart View. To request admin access, put in an ITS ServiceNow INC ticket and give the IT Field Services representative these instructions:
2. Close all Microsoft products (Internet Explorer, Outlook, Word, Excel, Access, Visio, Project, PowerPoint, Lync, OneNote, InfoPath, Publisher, etc.)
3. Uninstall all older versions of Smart View from your system before installing the latest version.

To uninstall an older version of Smart View:

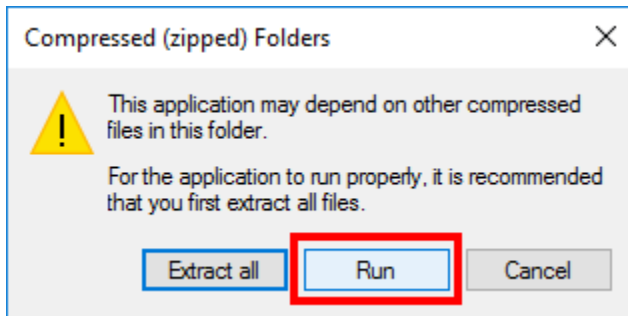
Windows 7	4. Windows 10
<ol style="list-style-type: none">1. Click Start2. Select Control Panel3. Select Programs4. Click Programs and Features5. Select the program you want to uninstall by clicking on it, and then click the Uninstall button6. Restart your machine	<ol style="list-style-type: none">1. Click Start2. Select Settings3. Select System4. Select Apps & features5. Select the program you want to uninstall by clicking on it, and then click the Uninstall button6. Restart your machine

To download Smart View:

1. Download Smart View from **any browser except Internet Explorer** from the UPlan website at <https://brm.ucsf.edu/uplan> > click on Training and Job Aids > Download Smart View.



2. Click "Run" in the dialog box that appears.



3. Downloading may take several minutes depending upon the speed of your computer or network connection. During the process, you may see several black boxes flashing on the screen. Do not touch the boxes or attempt to control the download process. When the download process is finished, you will see a small dialog box confirming the download is complete.
4. Open Excel.

The complete instructions can be found on page 6 of the Smart View: Installation and Planning Forms training manual. Contact uplan@ucsf.edu with any issues.

- **UPlan Downtime:** UPlan will be down for the year-end/open activities beginning Tuesday, August 8 and back up on Tuesday, August 29. Below are the summary highlights of what will be completed.
 - June Final actuals will be loaded
 - Working Plans will be copied to Approved Plans for any control point that has not already completed this activity
 - Approved Plans will be copied to Final Plans (note that some Control Points opt for copying their Working Plan to Final)
 - UPlan data will be archived
 - The archived data will be accessible to all planners as a separate application when UPlan re-opens
 - July 1 ChartField changes will be implemented
 - SOM PLUS data will be imported
 - Years will roll over and new Forecast year will be seeded from Plan Final
 - FY18 = Year 0 Forecast
 - FY19 = Year 1 Plan
 - FY20 = Year 2 Plan
 - In CommtPln, FY28 = Year 10 Plan
 - July FY18 actuals will be loaded
 - UPlan will send 2017-18 August Forecast and 2017-18 Plan Final to MyReports
 - Separated/inactive employees with no plan data will be purged

Bug Fixes & Enhancements:

- 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”.

