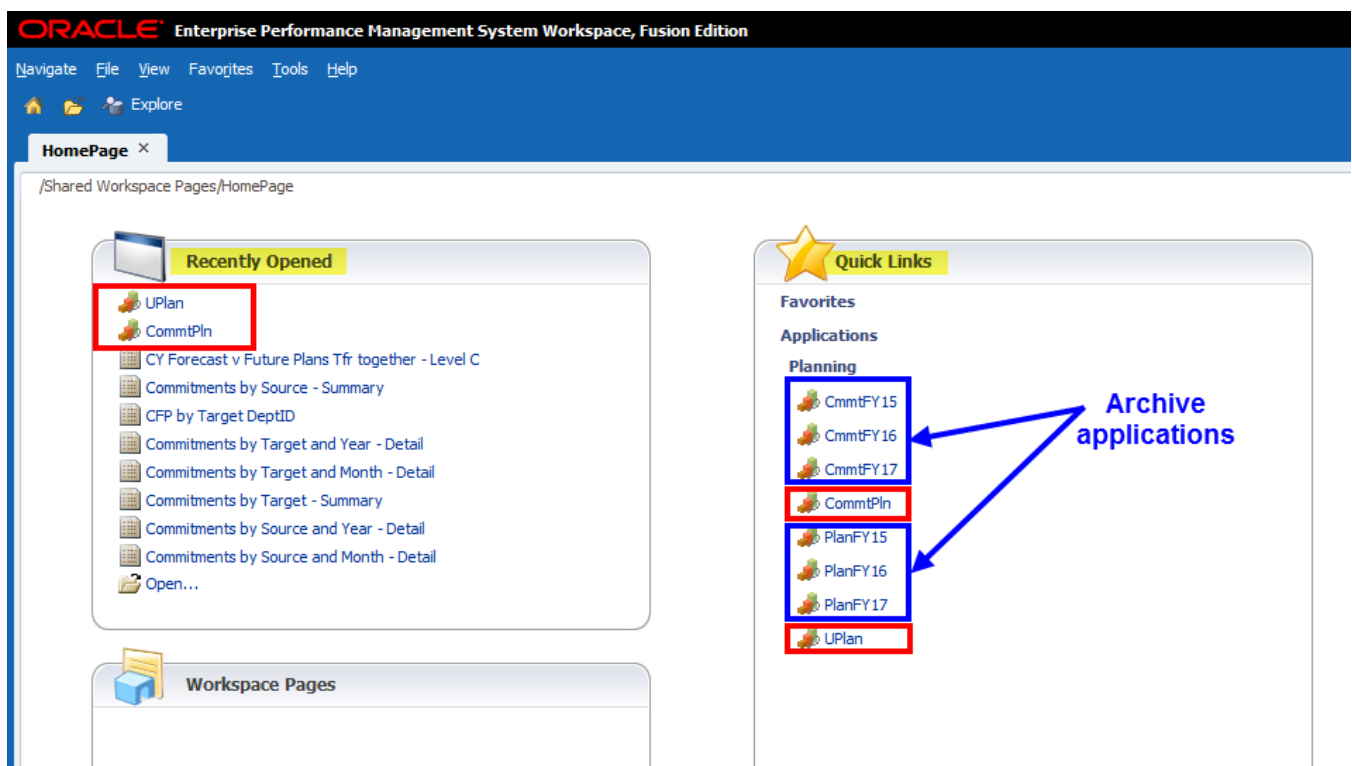# UPlan Weekly Digest

Friday, September 1, 2017

Announcements:

- **UPlan is now available!** Below is a summary of the year-end/open activities completed during the downtime.
    - June Final actuals loaded
    - Working Plans copied to Approved Plans for control points that did not complete this activity prior to downtime
    - Working or Approved Plans copied to Final Plans
    - UPlan data archived; archived data is accessible to all planners as a separate cubes labeled:
        - "PlanFY17" for General and Employee
        - "CmmtFY17" for Commitment Tracking
    - ChartField changes effective July 1 implemented
    - SOM PLUS FY18 Plan Final data imported
    - Forecast year 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 loaded
    - FY18 Plan Final and August Forecast exported to and available in MyReports
    - Employee dimension purged
        - Separated employees with no FY18 and FY19 plan data purged
        - Separated employees with FY18 and FY19 plan data not purged so that Approved/Final Plan numbers   remained unchanged

- **How to Navigate to UPlan, CommtPln, and Archive applications:** UPlan and CommtPln should be visible in your "Recently Opened" section. If this is your first time logging in to UPlan, then you will see UPlan, CommtPln, and all the archive applications under the "Quick Links" section.

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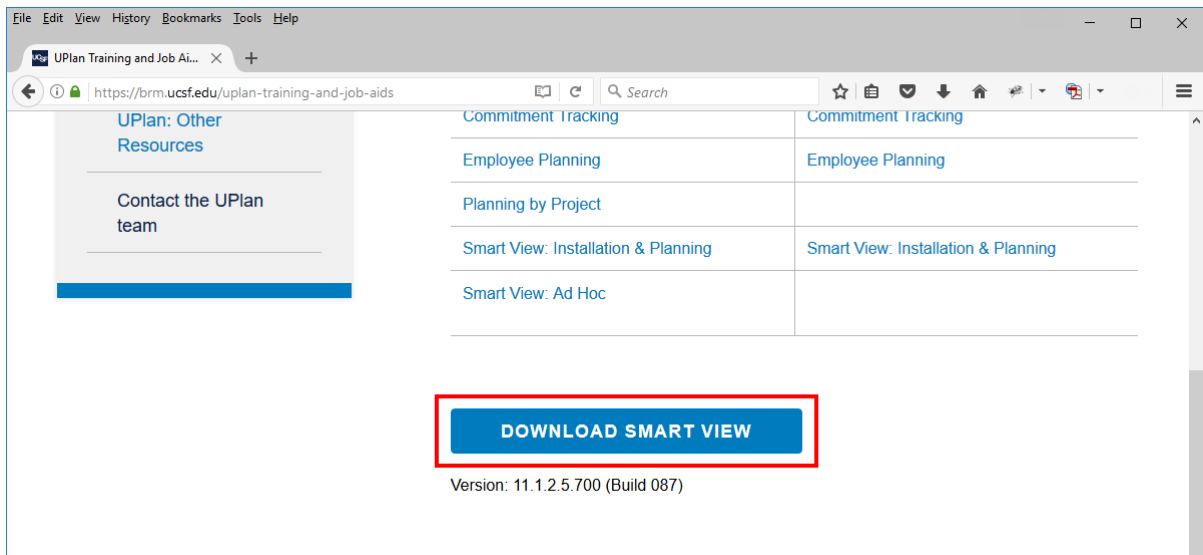
  To get started:

  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.
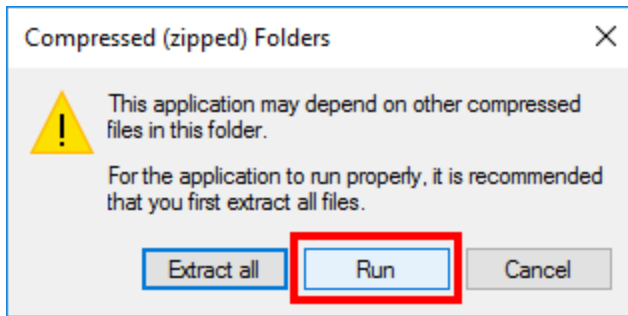
  To uninstall an older version of Smart View:

Windows 7	Windows 10
1. Click **Start** 2. Select **Control Panel** 3. Select **Programs** 4. Click **Programs and Features** 5. Select the program you want to uninstall by clicking on it, and then click the **Uninstall** button 6. **Restart** your machine	1. Click **Start** 2. Select **Settings** 3. Select **System** 4. Select **Apps & features** 5. Select the program you want to uninstall by clicking on it, and then click the **Uninstall** button 6. **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.

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".