

UPlan Weekly Digest

Wednesday, November 22, 2017

Announcements:

- **UPlan Resources Website:** The new UPlan Resources website has been successfully migrated last Friday, November 17, to the existing site: <https://brm.ucsf.edu/uplan>. With the new website, we aimed to simplify the UPlan content and information flow, improve the accessibility of training materials and communication updates, as well as enhance the overall aesthetics of the site.

Below are some highlights from our redesigned website:

1. Streamlined menus and clear navigation that direct end-users to the most relevant information and resources quickly and efficiently.

The screenshot shows the UPlan website homepage with several key features highlighted by red and blue boxes and arrows:

- Main Page Navigation:** A red box highlights the central navigation area containing three main sections: "Getting Started", "Knowledge Base", and "Additional Resources".
- Latest Updates:** A blue box highlights the "UPlan Tweets" section on the right side of the page.
- Footer Navigation on all pages:** A green box highlights the footer area, which mirrors the main navigation sections and includes a "Contact the Webmaster" button.

The website header includes the UCSF logo, "Budget and Resource Management", and navigation links for "Home", "Department Units", "Recharge Review", "STIP", and "UPlan". The main content area features a "UCSF Financial Planning and Analysis Tool" introduction, a "UPlan Calendar" with upcoming events, and a "SEE MORE" button.

University of California San Francisco | About UCSF | Search UCSF | UCSF Medical Center

UCSF Budget and Resource Management

Home | Department Units | Recharge Review | STIP | UPlan

Home > UPlan > Knowledge Base > UPlan Training Resources

UPlan Training Resources

Training | Job Aids | Manuals | Presentation Slides | Video Tutorials

In-Class Training

Prerequisite: Participants will need to have their UPlan access set up prior to the hands on computer based training sessions. Learn more on how to get access to the UPlan application here.

Training content will be divided into two categories:

New User Training: For new users across the campus.

Session	Time	Topic	Date
1	4 hours	<ul style="list-style-type: none"> Navigating in UPlan General Planning Commitments Planning Form Reports & Financial Reports (FR) 	Spring 2018
2	4 hours	<ul style="list-style-type: none"> Employee Planning Employee Form Reports & FR 	Spring 2018

Smart View Planning Forms

User Support

While the UPlan team is available for user support year round, during the planning season, the UPlan team offers onsite support every Wednesday or by appointment. Once you have contacted UPlan for assistance, at least one of the team members will schedule a visit to your workstation to help answer UPlan questions or with any training needs. Please email uplan@ucsf.edu to schedule our visit.

UCSF Medical Center

- UPlan Home
- Getting Started
 - Request UPlan Access
 - UPlan Browser Requirements
 - Download Smart View
 - Login to UPlan via MyAccess
- Knowledge Base
 - UPlan Training Resources
 - UPlan Enhancements
 - UPlan Known Issues
 - UPlan Tips and Tricks
 - UPlan FAQs
 - UPlan Glossary
- Additional Resources
 - UPlan System Status
 - UPlan Weekly Digest
 - Other Resources
 - Contact Us

2. Better search results, including the ability to search online user manuals and job aids.

- o Search UPlan webpages

University of California San Francisco | About UCSF | Search UCSF | UCSF Medical Center

UCSF Budget and Resource Management

Home | Department Units | Recharge Review | STIP | UPlan

Home > UPlan

Search by keywords → Search...

- o Search UPlan manuals

UPlan Training Resources

Training | Job Aids | **Manuals** | Presentation Slides | Video Tutorials

Search manuals → Search

UPLAN MANUALS

- 1.0 NAVIGATING IN UPLAN
 - 1.1 Introduction to UPlan
 - 1.2 Navigating in UPlan
 - 1.3 Overview of Forms
 - 1.4 Right-Click Menu Features
 - 1.5 Reports
- 2.0 GENERAL PLANNING
- 3.0 COMMITMENT TRACKING
- 4.0 EMPLOYEE PLANNING
- 5.0 PLANNING BY PROJECT AND FP INTEGRATION
- 6.0 SMART VIEW

Search for answers

Name	Revision Date	Download
Navigating in UPlan	01/26/2016	Download
General Planning	04/19/2016	Download
Commitment Tracking	01/24/2016	Download
Employee Planning	02/04/2016	Download
Planning by Project and FP Integration	03/31/2016	Download
Smart View: Installation and Planning	08/04/2017	Download
Smart View: Ad Hoc	02/19/2016	Download

UPlan Menu

Top

- Filter and search within Job Aids.

University of California San Francisco About UCSF Search UCSF UCSF Medical Center

UCSF Budget and Resource Management Home ▾ Department Units ▾ Recharge Review ▾ STIP UPlan

Home > UPlan > Knowledge Base > UPlan Training Resources > General Planning Global Assumptions

General Planning Global Assumptions

Global Assumption Categories by Fund and Project Use

The following table shows Fund and Project Use values to which each row of the global assumption table applies.

Global Assumption Row Category	Funds	Project Uses
<input type="text" value="Filter by Fund"/>	<input type="text" value="Filter by Fund"/>	<input type="text" value="Filter by Fund"/>
Comp. Plans/Clinics	1800 State specific fund	All
Endowment Earnings	1810 State special grants fund	Costed Central Activities Non-recharge, Non-CCA Recharges Sponsored Projects
ICR Appropriations	1884 State lottery fund	All
Private Gifts	1900 State educational appropr	All
S&S – Costed Central	1924 Student academic prep progs	All
S&S – Other	1933 UC general fund	All
S&S – Recharges	1999 Other Sources – UC Programs	Sponsored Projects
Sponsored Projects	3000 Tuition	All
State Appropriations	3010 Nonresident Supplemental Tuition	All

UPlan Menu

3. More resources and new content added to website:
 - **Request UPlan Access** page shows new users how to get access to UPlan.
 - **UPlan Browser Requirements** page contains presentation slides and guides that will walk users through the setup of their browser settings.
 - **Download Smart View** page provides step-by-step instructions on how to download and install Smart View.
 - **System Status** page indicates UPlan’s availability, timing of data movement, and scheduled maintenance.

Your feedback is very important to us as we strive to continue to develop a website that is valuable to you and your ideas are welcome! Please contact the UPlan team at uplan@ucsf.edu if you have any questions, comments, or concerns.

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”.