UPlan Weekly Digest

Friday, February 16, 2018

Announcements:

- UPlan New User Training Session 3: Due to scheduling conflicts, the UPlan New User Training Session 3 that was scheduled for Tuesday, February 20th is rescheduled to Monday, February 26th from 1pm-5pm.
- **RESOLVED Employee "Salary Level Override" Account Now Actualized:** January actuals for the employee "Salary Level Override" account in the Search Individual Empl form have been loaded into UPIan and will override any amounts previously projected in the closed month.

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				2017-18 Forecast Working			Feb - Jun of the Forecast reflect the latest OLPPS data.]		2018-19 Plan Working	
				Nov Dec		Jan	Feb Mar Apr		May Ju	Jun	⊿ YearTotal	> YearTotal	
10011-11-200-10000-10000-	T7376: ADMIN OFCR 2	Initial Base&Neg Salary	3	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	59,047	
		Global Assumptions %											
		Override Global %											
		Global Assumptions Impact \$											
		Salary Level Override	3	5,368	5,368	5,368						37,575	
		New Base&Neg Salary	3	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	64,415	
		Addtl Salary											
		Fac Bon&Incv (BYZ)											
		Ending Total Salary	3	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	64,415	
		Base&Neg Benefits (%)	ò	70%	54%	67%						67%	
		Addtl Benefits (%)											
		Fac Bon&Incv (BYZ) Benefits (%)											
		Base&Neg Benefits Adj (%)											
		Addtl Benefits Adj (%)											
		Fac Bon&Incv (BYZ) Benefits Adj (%)										
		Base&Neg Benefits (\$)	3	3,758	2,899	3,596						23,404	
		Addtl Benefits (\$)											
		Fac Bon&Incv (BYZ) Benefits (\$)											
		Benefit \$ Totals	2	3,758	2,899	3,596						23,404	

 Salary Global Assumptions – The salary global assumptions by bargaining unit/TUC have been updated in Employee Planning at the D999999 level to reflect the campus planning assumptions for 2018-19 and 2019-20. Only the merit increase for 99's and range increases for all other bargaining units are included. Each Control Point and their departments have the option to adjust these assumptions as needed at Level 1 or 2 DeptID's. The Salary Global Assumptions form can be found under My Task List > Employee Planning > Empl Global Assumptions in UPlan, see screenshots below for both the web and Smart View. Note that assumptions for increases that do not occur across the board are not included: step increases, equity increases, academic merits, and lump sums; and any bargaining unit with "TBD" assumptions were left blank.

Enterprise Performance Management System Workspace, Fusion Edition

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> Manage Task Lists	Task - Salary Global Assumptions	Task Instructions			
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Multi-Empl Forms			2017-18		
			Sal Incr Month	Base Sal %	Sal Ir
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Multi-Empl Forms		2017-18		2018	3-19	2019-20		
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 DEH Empl Forms Empl Global Assumptions Salary Global Assumptions Empl Seeding Options Empl FP Feed Fengl FP Feed Push Empl Data to General Administrator Tasks 	99: No Bargaining Unit Assumptions	Jul	3.00%	Jul	3.00%	Jul	3.00%	
	A2: Academic Senate Assumptions	Jul	3.00%	Jul	2,50%	Jul	2,50%	
	BX: Readers & Tutors Assumptions							
	CX: Clerical & Allied Services Assumptions	Jul	3.00%	Jul	3.00%	Jul	3.00%	
	DX: Physicians, Dentists and Podiatrists Unit Input	Jul	3.00%	Jul	3.00%			
	EX: Patient Care Technical Assumptions	Apr	4.00%					
	FX: Non-Senate Academic Research Professionals Assumptions	Jul	3.00%	Jul	2.50%	Jul	2.50%	
	GS: Printing Trades Assumptions							
	HX: Residual Patient Care Professionals Assumptions	Jan	4.00%					
	IX: Non-Academic Senate-Instructional Assumptions	Jul	2,50%	Jul	2,50%	Jul	2,50%	
	K2: Skilled Crafts Assumptions	Mar	3.00%	Mar	3.00%	Mar	3.00%	
	LX: Professional Librarians Assumptions	Jul	2.50%	Jul	2.50%			
	NX: Registered Nurses Assumptions	Jan	4.00%					
	PA: Police Officers Assumptions	Dül	3.00%	Jul	3.00%	Jul	3.00%	
	PX: Postdoctoral Scholars Assumptions							
	RX: Research Support Professionals Assumptions	Oct	3.00%					
	SX: Service Assumptions	Oct	3.00%					
	TX: Systemwide Technical Assumptions	Oct	3.00%					
	87: Stipend/Differential Pay (No Bargaining Unit) Input	Jul	3.00%	Jul	2.50%	Jul	2.50%	
				Jul	2.50%	Jul	2	

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Bug Fixes & Enhancements:

"Planning by Project" Enhancement: UPlan is now live with the "Planning by Project" enhancement. This • enhancement allows planning for individual projects that are Sponsored, Retention, Recruitment, Other Faculty/PI, and Capital projects rather than as aggregated UPlan-only project IDs.

• Reference the <u>UPIan Enhancements</u> page for a complete list of enhancements relevant to the last fiscal year.

Known Issues:

• General Planning form reports are unavailable: There is an unresolved issue that surfaced during the Planning by Project migration downtime where the form reports in General Planning are not loading as expected. These include the Completion Tracking and various net position reports, see screenshot below. As a precaution, the reports have been temporarily removed from "My Task List" and will be added back when the issue is resolved.



• Reference the <u>UPlan Known Issues</u> page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under "Bug Fixes & Enhancements".