

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 UPlan and will override any amounts previously projected in the closed month.

Task - Search Individual Empl | Task Instructions

Empl Sal&Ben Level | Empl Distr Pct | Empl Distr Sal \$ | Empl Distr Ben \$ | Empl Summary

		2017-18 Forecast Working										2018-19 Plan Working	
		Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YearTotal	YearTotal		
T7376: ADMIN OFCR 2	Initial Base&Neg Salary	5,368	5,368	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	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	37,575	
	New Base&Neg Salary	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	64,415	
	Addtl Salary												
	Fac Bon&Invc (BYZ)												
	Ending Total Salary	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	5,368	64,415	
	Base&Neg Benefits (%)	70%	54%	67%								67%	
	Addtl Benefits (%)												
	Fac Bon&Invc (BYZ) Benefits (%)												
	Base&Neg Benefits Adj (%)												
	Addtl Benefits Adj (%)												
	Fac Bon&Invc (BYZ) Benefits Adj (%)												
	Base&Neg Benefits (\$)	3,758	2,899	3,596								23,404	
	Addtl Benefits (\$)												
	Fac Bon&Invc (BYZ) Benefits (\$)												
	Benefit \$ Totals	3,758	2,899	3,596								23,404	

Feb - Jun of the Forecast reflect the latest OLPPS data.

- 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.

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

UPlan - Task List Status

Task - Salary Global Assumptions

Version: Working

	Forecast 2017-18		Plan 2018-19		Plan 2019-20	
	Sal Incr Month	Base Sal %	Sal Incr Month	Base Sal %	Sal Incr Month	Base Sal %
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	Jul	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%

Book1 - Excel

POV Employee Global Assumptions - uplan.ucsf.edu_UPlan_1

999999: Chancellor UCSF Input Working Refresh

	Forecast 2017-18		Plan 2018-19		Plan 2019-20	
	Sal Incr Month	Base Sal %	Sal Incr Month	Base Sal %	Sal Incr Month	Base Sal %
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A2: Academic Senate Assumptions	Jul	3.00%	Jul	2.50%	Jul	2.50%
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Smart View

Task List

Server: uplan.ucsf.edu Application: UPlan

Employee Planning

- 1.0 Individual Empl Forms
- 2.0 Multi-Empl Forms
- 3.0 TBH Empl Forms
- 4.0 Empl Global Assumptions
- 4.1 Salary Global Assumptions**
- 5.0 Empl Seeding Options
- 6.0 Empl FP Feed
- 7.0 Empl Reports
- 8.0 Push Empl Data to General

Open Form Mark Complete

Task Details

Task List

25 Total: 25

0% Complete Overdue

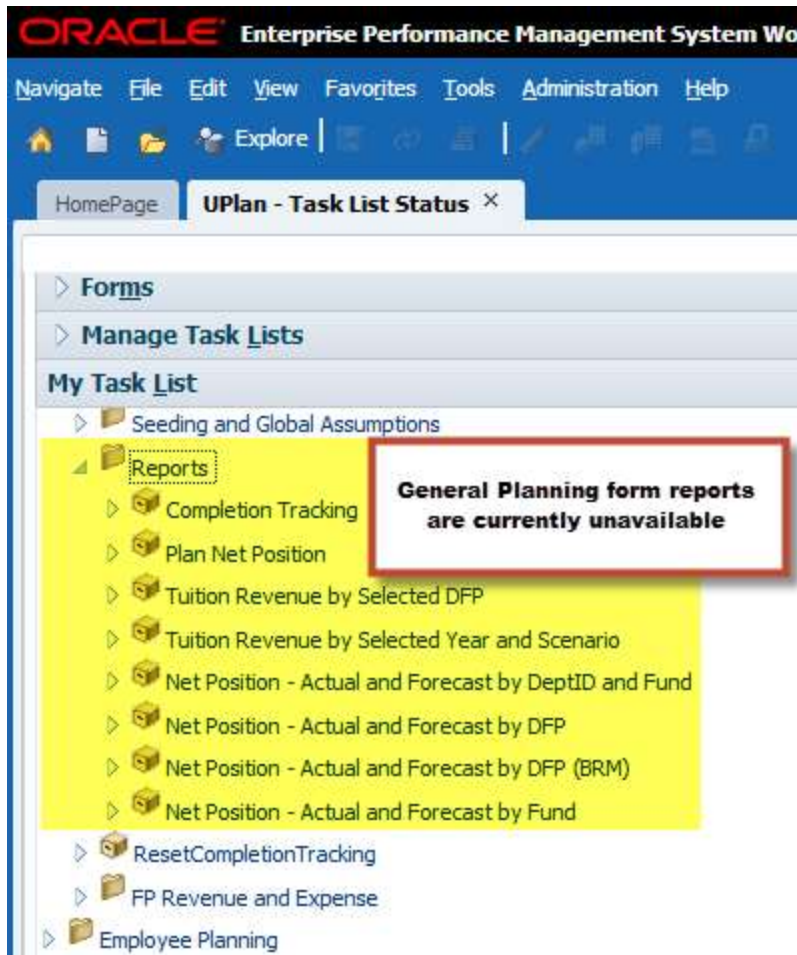
Bug Fixes & Enhancements:

- **“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 [UPlan Enhancements](#) 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 [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”.