

UPlan Weekly Digest

Friday, October 30, 2015

Announcements:

- This email digest is the first of weekly updates from the UPlan Team and is based on user feedback for more frequent communication. These emails will be similar in format to the monthly updates and will include tips & tricks, known issues, and other pertinent information.
- **Downtime and Monthly Actuals Load on 11/9:**
 - PeopleSoft will be reopened in the next few days to make postings to June Final FY15 (Period 12). This requires significant steps to correct the FY15 Net Position – End of Period and FY16 Net Position – Beginning of Period within multiple cubes in UPlan. In order to load Actuals and make the necessary corrections to Net Position, **UPlan will be down starting at 12:00pm on Monday, November 9**. As usual, Actuals will be available the following morning, Tuesday, November 10. An email alert will be sent when the system is taken down and brought back up.

Tips and Tricks:

- **FR Reports under “Explore” in UPlan Web:** If your cursor does not properly select the right folder or report, it may be an internet browser Zoom setting. To resolve, go to “View” on your browser menu and click on Zoom->Reset.

Known Issues:

- **Automated Employee to General Integration:**
 - The automated “Employee Planning to General Revenue & Expense” portion of internal integration was accidentally turned on and then off last Friday, October 23. As a result of this, the salary and benefits distribution dollars in Employee Planning was pushed to General Planning. **We are asking planners to please check your revenue and expense form for DFP’s with salary and benefits to review the amounts.** Note that the automated Employee to General Integration will be turned back on in the near future and we will send a follow-up email in advance.
 - In the meantime, if you would like to integrate any employee data changes to General Planning, **please manually integrate** changes to employee data by launching “Push Empl Data to General” under My Task List>Employee Planning for your DeptID (can be at parent DeptID level).
- **TBH Distributions for Closed Months:** The distribution percentages and dollar amounts for TBH’s do not clear when the Forecast month closes. This has **no impact on forecasts in General Planning**, but results in overstated dollars on Employee Planning reports, (Compensation Detail by DFP and Multi-Empl Distr Pct and \$) and data entry forms. Users should simply ignore the TBH distribution percentage and distribution dollar for closed (actualized) months.
- **Purged and Separated Employees with Actuals:** Of the ~9000 separated and inactive employees purged from UPlan in September, 144 employees had payroll actuals retroactively posted for 2015-16. Although these employees have separated and inactive statuses, we will add them along with the associated actuals back into Employee Planning. All future issues

related to purged employees with retroactive payroll actuals will be loaded as needed. We anticipate resolution by the October actuals load.

Bug Fixes and Enhancements:

- **RESOLVED - TBH Composite Entry form:** Upon save, the calculation does not properly calculate the salary level and distribution dollars. This issue only impacts TBH's carried forward from last year's Plan and not any newly created TBH's.
- **RESOLVED:** The "5202C: Sponsored proj – F&A recovery_C" account in the "Revenue and Expense" form in General Planning was erroneously made read-only (grayed out) and now is writable.

Thank you,
The UPlan Team