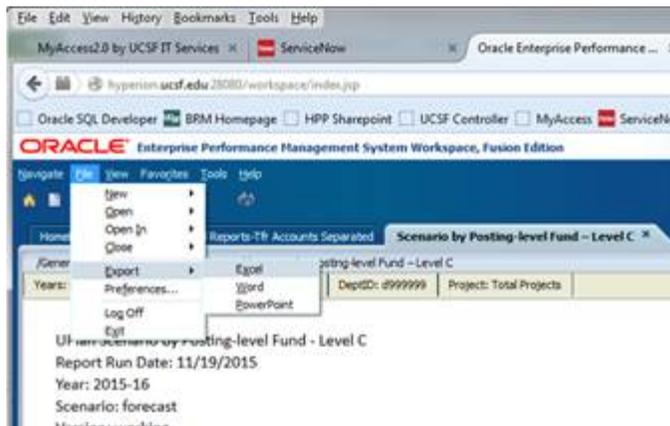


UPlan Weekly Digest

Friday, November 20, 2015

Alerts:

- **Financial Reporting (FR) Reports not available in Smart View:** Due to an Oracle bug, the FR reports are currently not accessible via Smart View if you have IE 11 installed. Please note that there will be no compatibility issues once UPlan upgrades to the newest version in January 2016. Until then, planners have two options if the FR reports are needed in Excel format:
 - Access the reports via UPlan web using Firefox and export to Excel:
 1. After logging on, click on the “Explore” button.
 2. Go to the “General Reports-Tfr Accounts Separated” folder and choose the report needed.
 3. Choose your parameters and after the report runs, go to File->Export->Excel on the Oracle menu.



- Although not recommended, planners may opt to downgrade IE 8 or IE 9.

Announcements:

- **UPlan website:** As part of an ongoing effort to improve communication, we have changed the UPlan website to include system alerts, tips & tricks, and past weekly digests. Please check it out at <http://brm.ucsf.edu/uplan!>
- **UPlan Forecast Export to MyReports:** Due to the UPlan downtime last week, an additional export to MyReports was completed to allow planners more time to make adjustments to the forecast reflected in MyReports for November. This overrode the 11/14 automated data export and MyReports now reflects the UPlan forecast as of 11/18, Wednesday evening.

Known Issues:

- **Compensation by DFP Report:** The Compensation by DFP report may not accurately reflect the actuals data for closed months as shown in the Employee Planning distribution forms for some employees. This was due to the automated Employee to General integration that was off (but now turned back on). Note that this **does not impact the actuals shown in the Revenue & Expense forms in General Planning**. We will be processing a true-up in the report for the closed months and will follow up once completed.
- **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-Emp Pl Distr Pct and \$) and data

entry forms. While we are working to address this issue, users should simply ignore the TBH distribution percentage and distribution dollar for closed (actualized) months.

- **Purged and Separated Employees with Actuals:** Of the ~9,000 separated and inactive employees purged from UPlan in September, 144 employees had payroll actuals retroactively posted for 2015-16. Although these employees are separated and have 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.

Bug Fixes and Enhancements:

- **RESOLVED - Connection/Access Issues:** There is a hard disk failure and perhaps more happening on one of the UPlan servers (PROD02). There has been a temporary fix and most production activity has been moved to the other UPlan server (PROD01). The permanent fix is anticipated for next week. We appreciate your patience during the multiple system outages to address the access errors you may have received.
- **RESOLVED - Automated Employee to General Integration:** The automated Employee to General Integration has now been turned on. The integration will run every 30 minutes (top of the hour and half hour) and will update the Revenue & Expense forms and the Compensation by DFP report for salaries and benefits. Note that the employee data integration only occurs for the open forecast/plan months and does not impact actuals (closed months).

Planners will **continue to have the ability to manually integrate employee data at other times** by following the below steps:

1. Go to My Task List>Employee Planning>Push Empl Data to General.
2. Click on Launch button.
3. On the Runtime Prompt pop-up, select your DeptID. The DeptID can be at any level of the MyOrg that you have access to.
4. Click Launch.

Please keep in mind that **the below data integration will continue to occur at the top of the hour:**

- Commitment data to General Planning
- All data to the Financial Reporting (FR) reports
- All data to the Smart View Adhoc reporting

Thank you,
The UPlan Team