

## UPlan Weekly Digest

Wednesday, January 20, 2016

### Alerts:

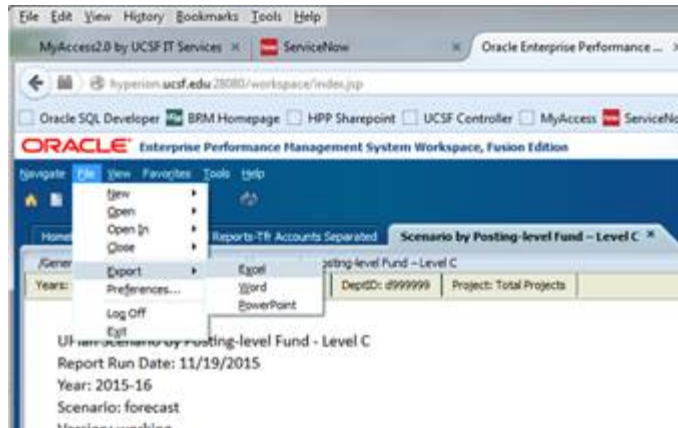
- **Downtime for UPlan Upgrade:** UPlan is being upgraded to the latest version of Oracle Hyperion Planning. Go-live will be 6:00am, Monday, 1/25. In order to implement the conversion, **UPlan will be unavailable between 8:00am Friday, 1/22 throughout the weekend, and back online for go-live at 6:00am, Monday, 1/25.**

### Announcements:

- **Upgrade Webinars:** UPlan is being upgraded! Dial-in to one of our webinars to hear about the changes as well as the enhancements to the system beginning Monday, 1/25. You should have received an Outlook calendar invite with web/dial-in instructions from your control point coordinator. All 3 webinars will cover the same material; there will be time for questions:
  - 2:00-2:30pm, Thursday, 1/28
  - 10:00-10:30am, Monday, 2/1
  - 1:30-2:00pm, Wednesday, 2/3
- **New User Training:** Annual new user training will take place for the Spring 2016 planning cycle on the following days and times. Most of the training manuals and slides have been updated on the [UPlan website](#). If you are a new user, please see your control point coordinator to sign up for one or more of the classes:
  - General & Commitment Planning: 8:30am-12:30pm, Wednesday, 1/27
  - Employee Planning: 1:00-5:00pm, Thursday, 2/4
  - Smart View Planning Forms: 1:00-5:00pm, Thursday, 2/11

### Known Issues:

- **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:
    - After logging on, click on the “Explore” button.
    - Go to the “General Reports-Tfr Accounts Separated” folder and choose the report needed.
    - 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.
- **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-Empl 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.