

## UPlan Weekly Digest

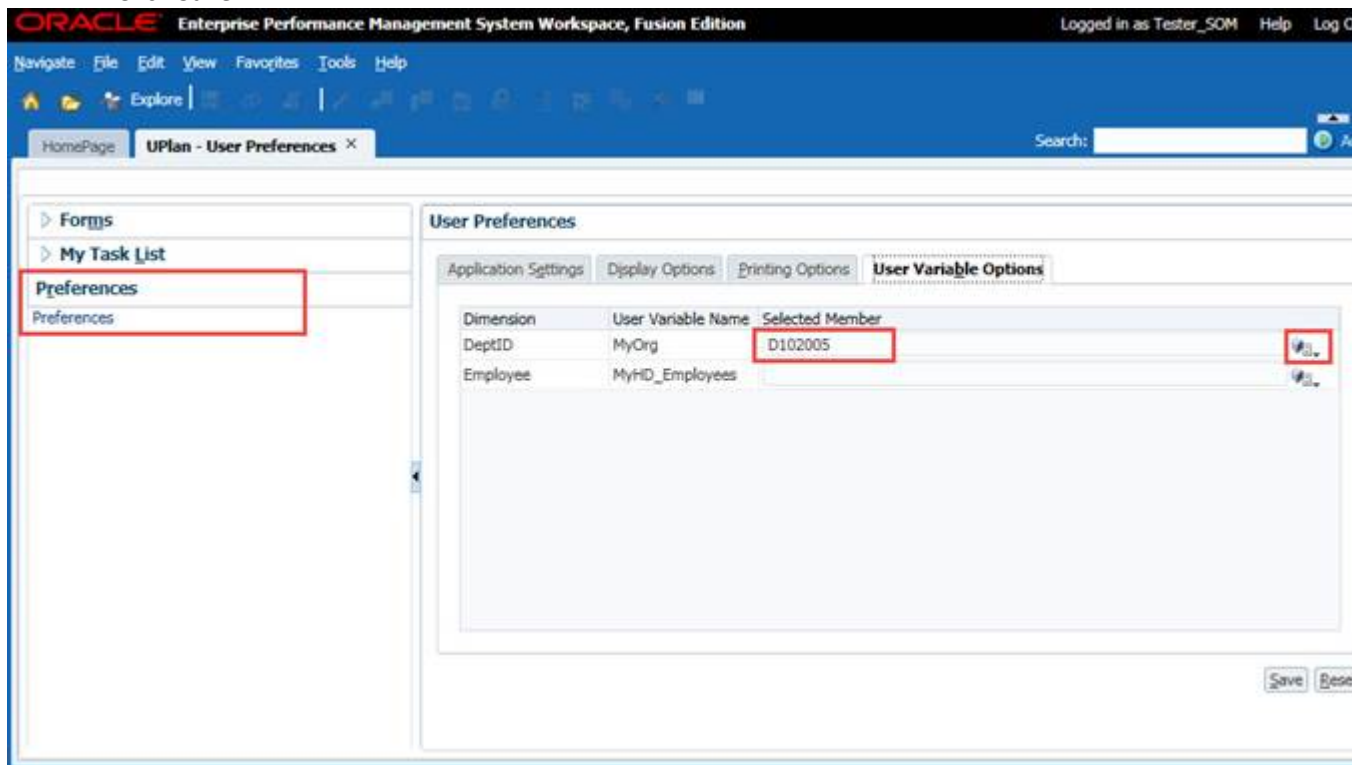
Friday, January 29, 2016

### Announcements:

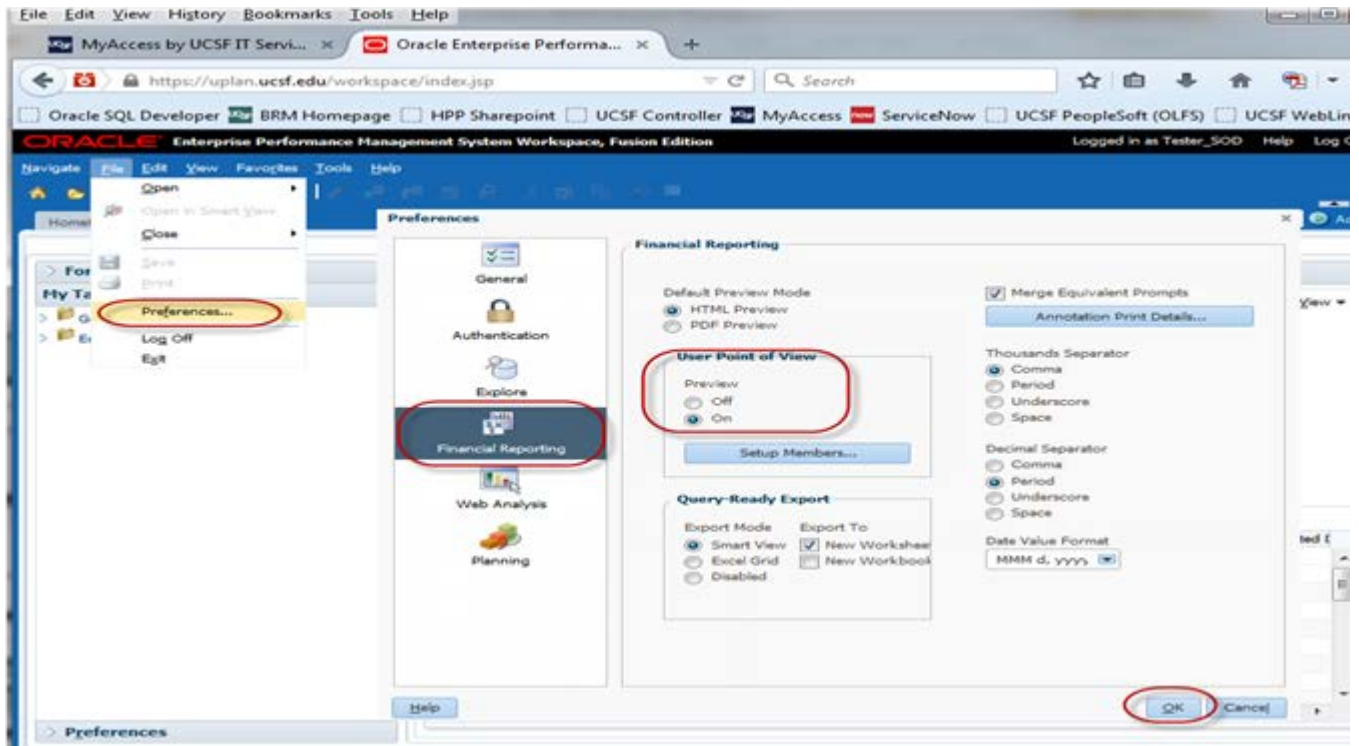
- **UPlan Upgrade and Webinars:** UPlan has gone live with the new upgraded version 11.1.2.4! If you haven't already, please dial-in to one of the two remaining webinars to hear about the major features and improvements to the system. You should have received an Outlook calendar invite with web/phone instructions from your control point coordinator. If you are unable to attend, click [here](#) for the slide presentation available on the UPlan website.
  - 10:00-10:30am, Monday, 2/1
  - 1:30-2:00pm, Wednesday, 2/3

### Tips and Tricks:

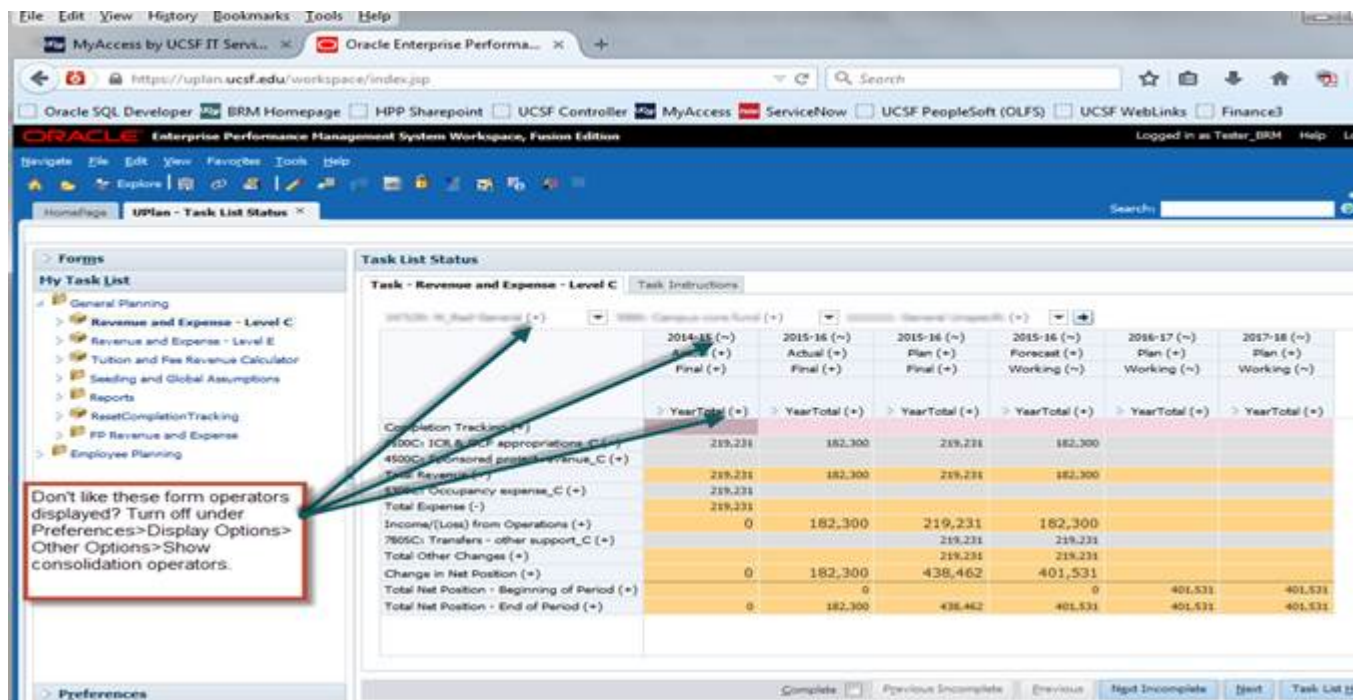
- **Reset MyOrg DeptID:** You may need to reset your MyOrg DeptID for both the UPlan and CommtPln applications to access some of the forms. To do this, go to Preferences > User Variable Options > enter MyOrg DeptID (Remember to enter the D before the DeptID number) > Click Save.

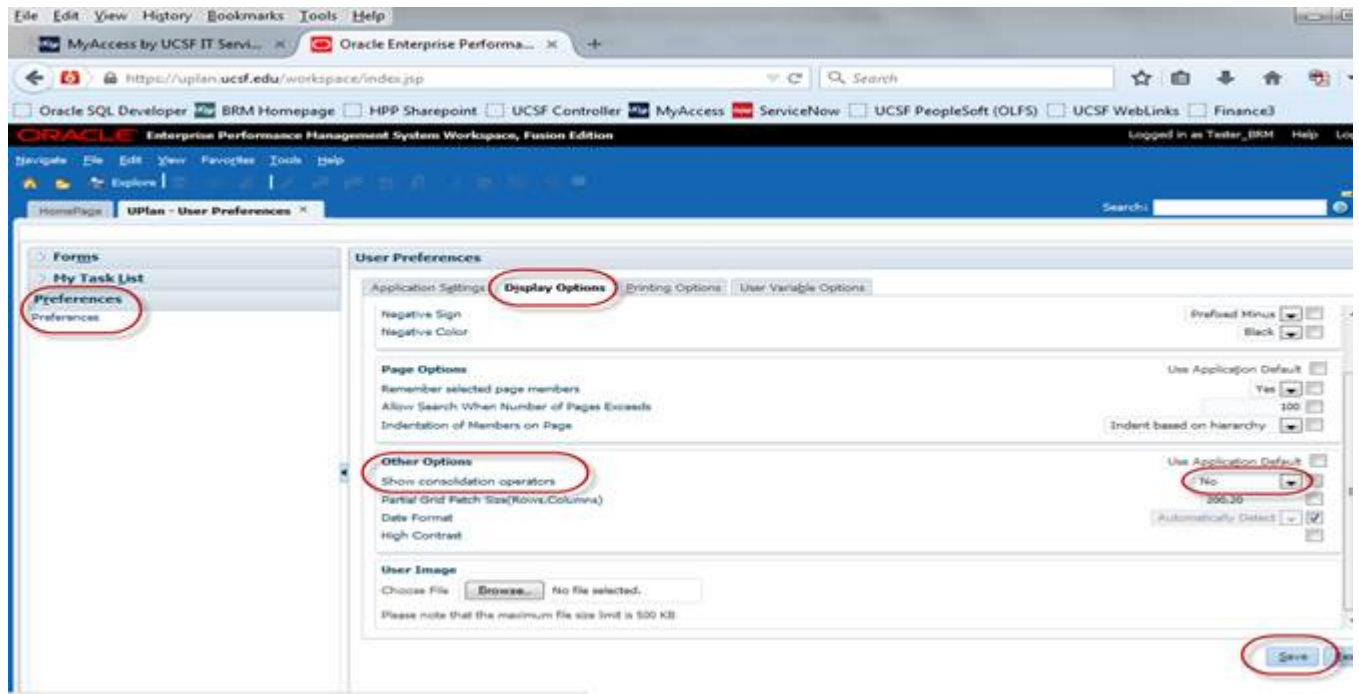


- **Set Hyperion Financial Reporting (FR) Preferences:** You will need to reset your FR preferences to view the FR reports. To do this go to UPlan File > Preferences > click on Financial Reporting > Under User Point of View Preview, click the ON button > click ok.



- Form Operator Signs:** If your forms display operator signs that you would like to remove, go to Preferences>Display Options>Other Options>Show consolidation operators, select “No” in the pull-down, and click the “Save” button.





### Known Issues:

- SOM Payroll Data in Open Forecast Months (Jan-Jun):** The payroll data for open forecast months (Jan-Jun) was overridden with UPlan payroll projections in error and was included in the January 14<sup>th</sup> export to MyReports. The issue has been corrected in UPlan and the data now reflects the original SOM 2015-16 Plan Final data that was loaded to UPlan. The corrected amounts will be reflected in MyReports on February 16<sup>th</sup> after the next UPlan monthly data export.
- Navigation to the Employee Composite form or the Compensation by DFP report:** When planners navigate to the individual employee composite form from another form, they may not be directly to the chosen employee. Likewise, when planners navigate to the Compensation by DFP report from the Revenue and Expense form, they may not be directly to the chosen DFP. This issue is under investigation.

### Bug Fixes and Enhancements:

- Sponsored Project Revenue Account:** The 4500C: Sponsored project revenue\_C account on the Revenue and Expense – Level C form in General Planning was previously auto-calculated but is now writable.
- RESOLVED** – In the old version, if planners had IE 11 installed, Financial Reporting (FR) Reports was not available in Smart View due to an Oracle bug. With the new upgrade, there are no longer any compatibility issues.

- **RESOLVED - 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 did not impact the actuals shown in the Revenue & Expense forms in General Planning.
- **RESOLVED - TBH Distributions for Closed Months:** The distribution percentages and dollar amounts for TBH's do not clear when the Forecast month closes. This had 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.

Thank you,  
The UPlan Team