

# UPlan Weekly Digest

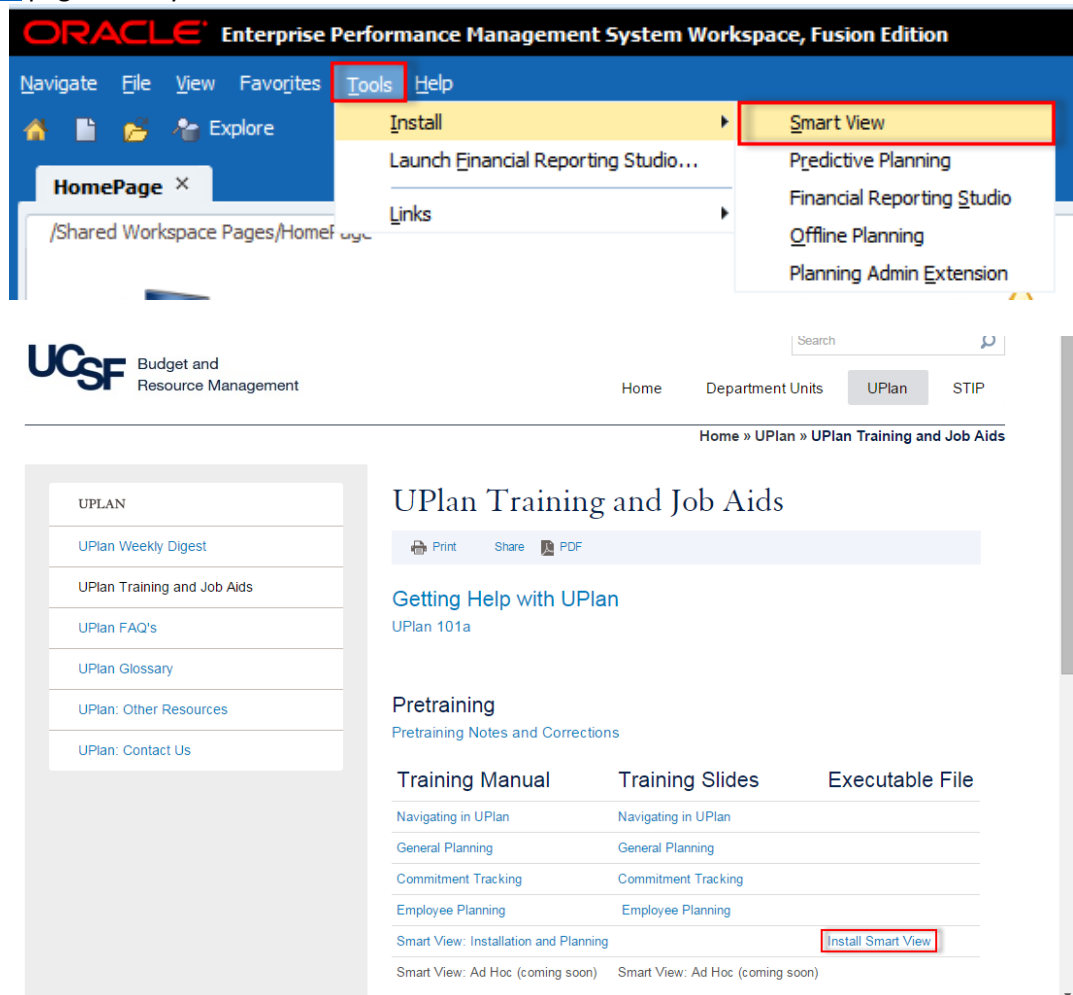
Friday, February 5, 2016

## Announcements:

- **UPlan Upgrade Webinars:** There have been three webinars since UPlan went live with the upgraded version on January 25<sup>th</sup>. **The webinar included three important preference settings to make the first time you log in.** You can view the settings to change on the webinar slide presentation available at <http://brm.ucsf.edu/uplan>.

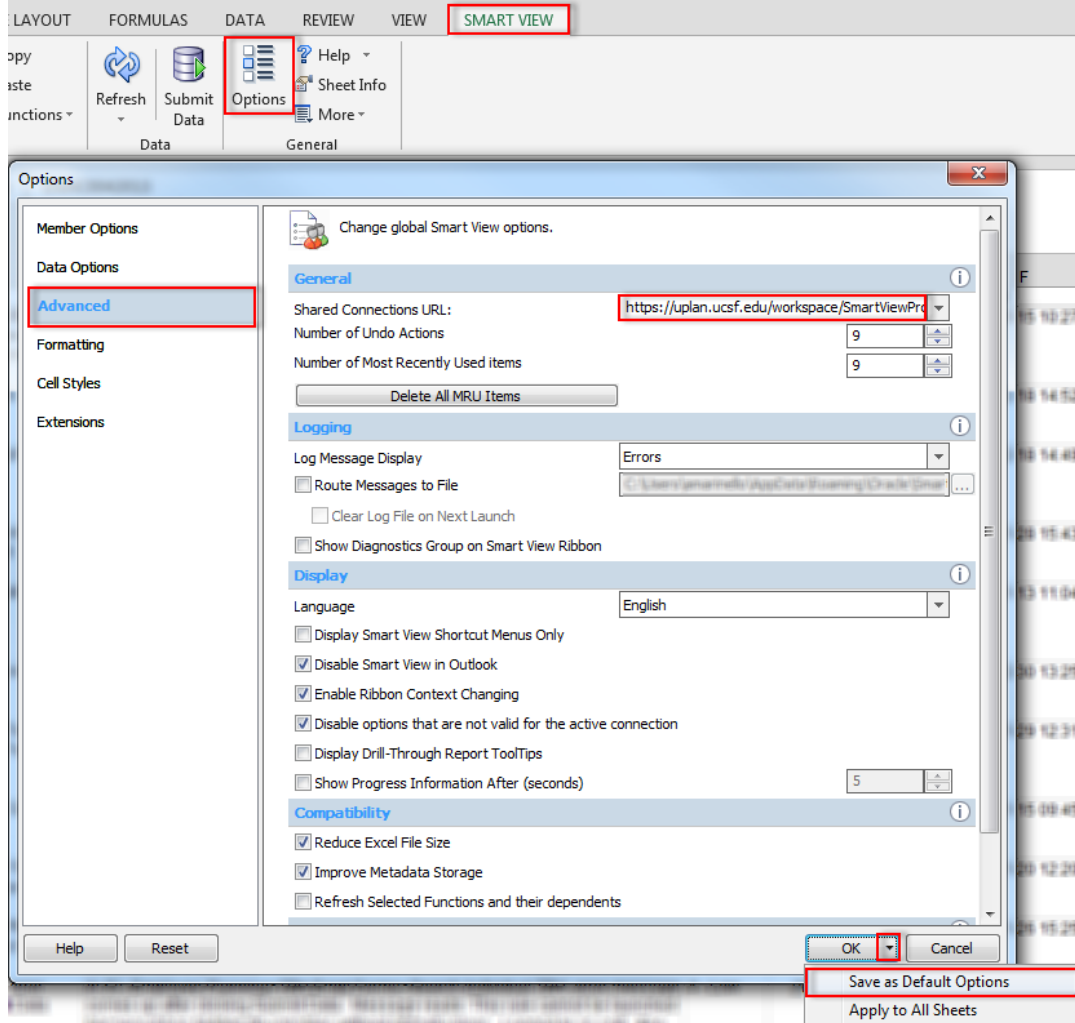
## Tips and Tricks:

- **Upgrade to the newest version of Smart View:** There is a new version of Smart View for you to install! First, read the Install Instructions in the [Smart View Training Manual](#). To access the latest version of Smart View when in UPlan, click Tools > Install > Smart View and you will be brought to the UPlan Training and Job Aids page. Or, you can visit the [UPlan Training and Job Aids](#) page directly and click on the “Install Smart View” link under the Executable File section.



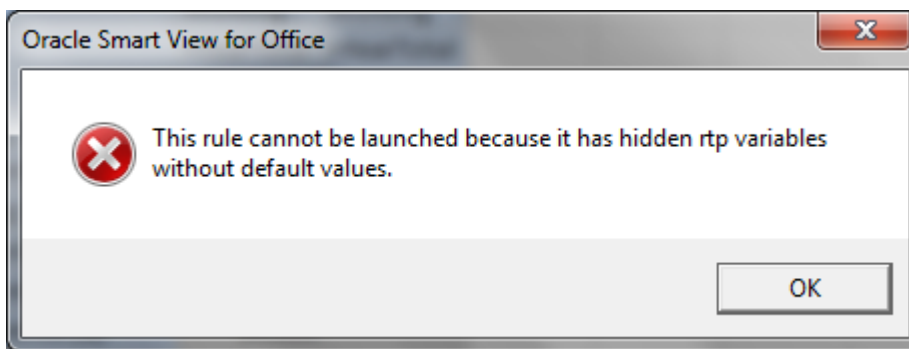
- Once installed, you will need to update the URL to: <https://uplan.ucsf.edu/workspace/SmartViewProviders>. To do so, go to the Smart View ribbon > Options > Advanced > update the URL in the General section > Save as Default

Options. Refer to the [Smart View Training Manual](#) for further instructions on setting user preferences in the latest version of Smart View.



### Known Issues:

- **Search Individual TBH form in Smart View only:** Planners receive the below error message when submitting data using the Search Individual TBH form in Smart View. This issue is under investigation. Please **use the Search Individual TBH form in the web** in the meantime.



- Search Individual Empl form in Smart View only:** Due to an Oracle bug, when planners use the Search Individual Empl form in Smart View to submit data, they are prompted to select and enter the Employee ID in order to submit the data successfully. A work-around is to **use the Search Individual Empl form in the web**, which does not require planners to select the employee. This issue will not be resolved until Oracle releases the fix in the next patch.

The screenshot shows a 'Business Rules' dialog box. At the top, there is a 'Plan Type' section with a checked checkbox next to 'Empl'. Below this is a table with three columns: 'Business Rule', 'Plan Type', and 'Type'. The table contains one row: 'Employee Composite', 'Empl', and 'Rule Set'. At the bottom of the dialog, there is a 'Runtime Prompts' section, which is highlighted with a red oval. This section contains the text 'Please select the Employee' and an empty input field with a user icon to its right. At the very bottom of the dialog are 'Save' and 'Cancel' buttons.

- Navigation to the Employee Composite form or to the Compensation by DFP report:** When planners navigate to the individual employee composite form from another form, they may not be brought 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.
- Faculty Portfolio (FP) Feed Copy in General Planning:**
  - The 4500C: Sponsored project revenue data in the "FP Feed" version does not auto-calculate for the open months and therefore, when planners copy the FP Feed data, the sponsored project revenue remains blank. Note that there was an enhancement released with the upgrade rollout where sponsored project revenue does not auto-calculate within the "Working" version but this account still should auto-calculate within the FP Feed version. This issue is under investigation.

- The data for Account 5202C: Sponsored proj – F&A recovery in the FP Feed version does not copy to the Working version. This issue is under investigation.
- **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. MyReports will reflect the correct amounts in the February 14th UPlan data export.

**Bug Fixes and Enhancements:**

**RESOLVED – Net Positions in Scenario by Posting-level Fund – Level C report:** Net Positions were not being calculated for Total Restricted, Total Unrestricted and Total Funds in this report. This issue has been resolved.