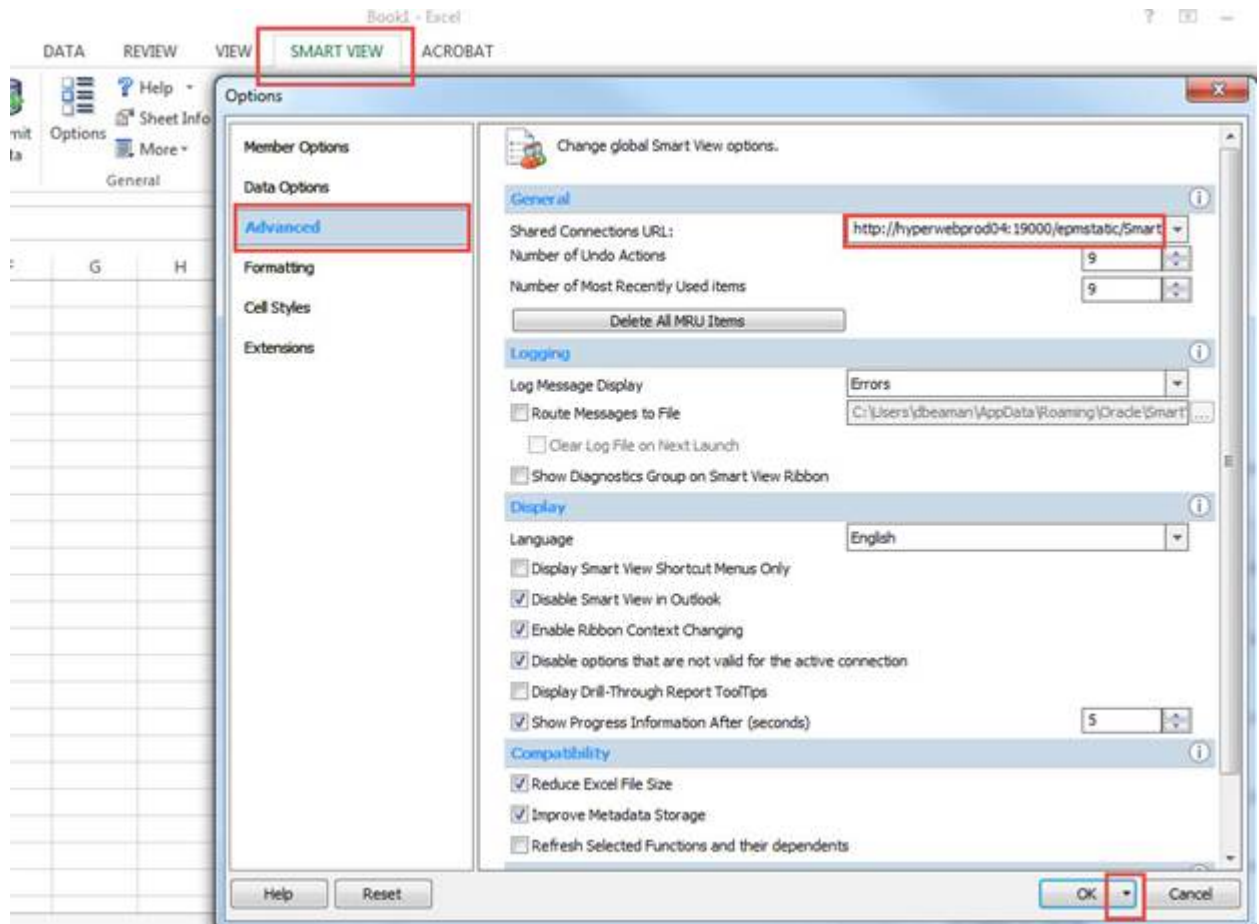


UPlan Weekly Digest

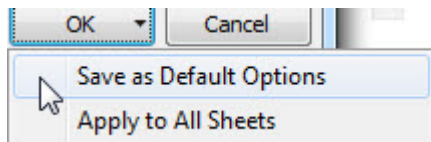
Friday, February 19, 2016

Announcements:

- **New Smart View URL:** All Users should update their Smart View URL. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section below. To update the URL:
Open Excel > click on Smart View ribbon > click on Options > Advanced Tab > insert this URL: http://hyperwebprod04:19000/epmstatic/SmartView_Connections.xml



Click on the triangle on the OK button > Save as Default Options.

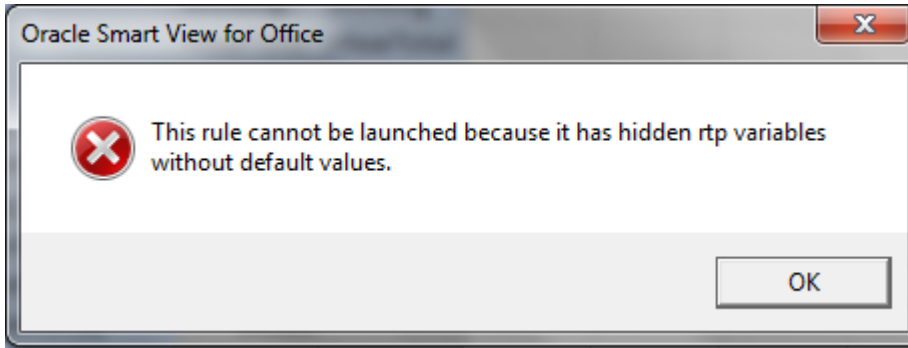


- **UPlan Training and Job Aids:** For those unable to attend any of the new user training sessions held in early February or would like a refresher, the slide presentations are available on the

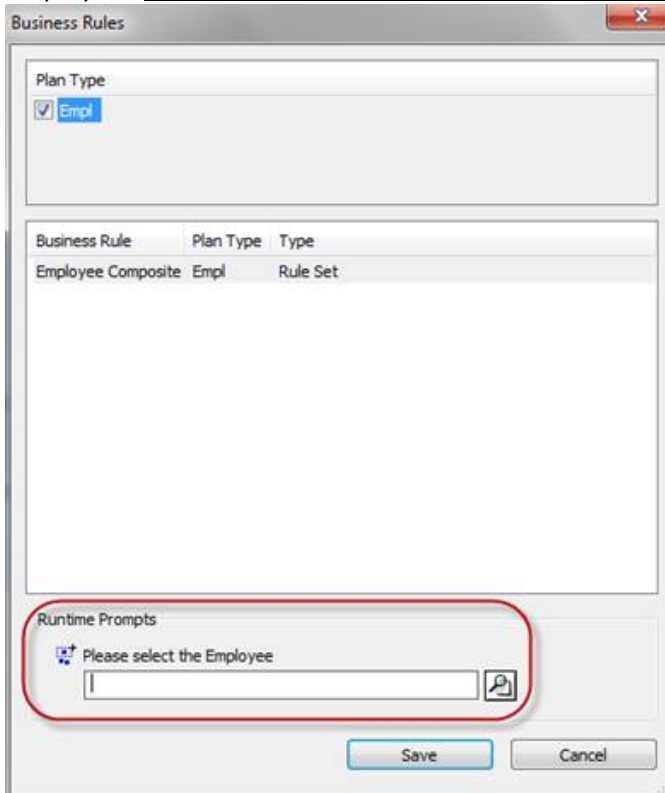
UPlan website at <http://brm.ucsf.edu/uplan-training-and-job-aids>. The training manuals and various job aids are also available for reference.

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.



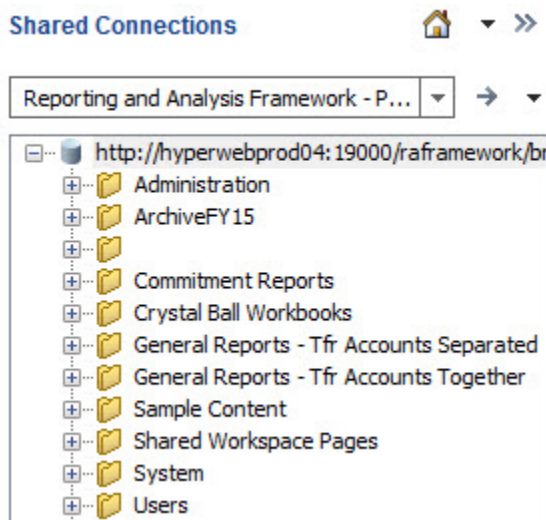
- **Search Individual Empl form in Smart View only:** Due to an Oracle bug, when planners use the Search Individual Empl form in Smart View to submit data, they are prompted to select and enter the Employee ID in order to submit the data successfully. A work-around is to **use the Search Individual Empl 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.



- **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.

Bug Fixes and Enhancements:

- **RESOLVED – FR Reports unavailable in Smart View:** Planners were unable to access the FR reports in Smart View under Reporting and Analysis Framework. To solve this problem, update the URL as outlined in the announcements section above. When the URL is changed the reports will be available again.



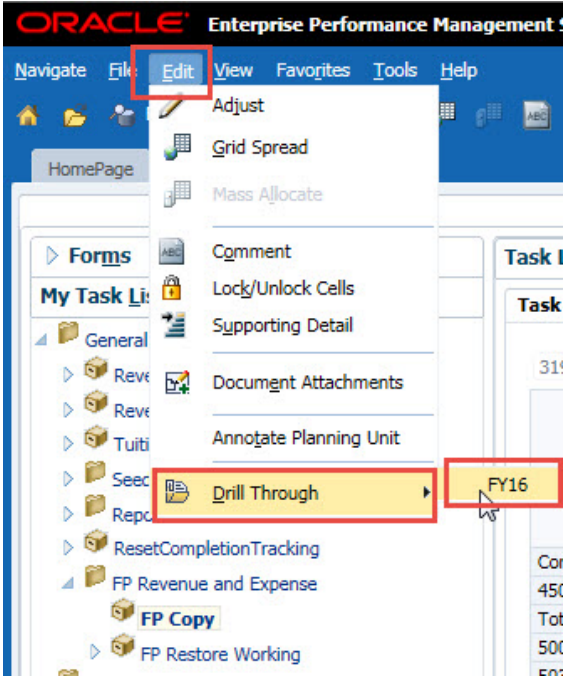
- **RESOLVED - SOM Payroll Data in Open Forecast Months (Jan-Jun):** The payroll data for open forecast months (Jan-Jun) was overridden with UPlan payroll projections in error and was included in the January 14th export to MyReports. The issue has been corrected in UPlan and the data now reflects the 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.
- **RESOLVED - Faculty Portfolio (FP) Feed Copy in General Planning:**
 - 4500C: Sponsored project revenue data in the "FP Feed" version was not auto-calculating for the open months so when planners copied FP Feed to Working, the sponsored project revenue was blank. 4500C is now auto-calculating in FP Feed version, allowing it to be copied to Working.
 - Account 5202C: Sponsored proj – F&A recovery in the FP Feed version did not copy to the Working version. It is now included when planners run the "Copy Forecast and/or Plan" rules.
 - Drill Bridge has been re-enabled in the UPlan Upgrade environment as a tool to see the ProjectIDs that roll up to the four FP Project Use "UPlan only" ProjectIDs: Sponsored, Recruitment, Retention, Faculty/PI/Owner Activity.

To see the ProjectIDs:
Click on cell.

	2015-16 Forecast FP Feed	2015-16 Forecast Working	2016-17 Plan FP Feed	2016-17 Plan Working
	> YearTotal	> YearTotal	> YearTotal	> YearTotal
Completion Tracking				
4500C: Sponsored project revenue_C	346,475	1,048,607	158,419	
Total Revenue	346,475	1,048,607	158,419	
5000C: Faculty salaries_C		152,591		
5030C: Faculty benefits_C		25,556		
5020C: Non-faculty academic salaries_C		95,167		
5040C: Non-faculty academic benefits_C		27,720		
5050C: Staff salaries and overtime_C		202,778		
5060C: Staff benefits_C		69,366		
5200C: Sponsored projects - subawards_C	17,501	17,501		
5202C: Sponsored proj - F&A recovery_C	206,558	340,000	158,419	
5515C: Supplies and materials_C	30,869			
5550C: Services_C	33,532			
5578C: Travel, Mtgs & Entertainment_C	6,885	3,316		
5579C: Scholarship/fellowship_C	27,335	56,960		
5580C: Other expenses_C	23,795	6,944		
Total Expense	346,475	1,079,331	158,419	
Income/(Loss) from Operations	0	-30,724	0	
Change in Net Position	0	-30,724	0	
Total Net Position - Beginning of Period	30,724	30,724	-0	-0
Total Net Position - End of Period	30,724	-0	-0	-0



Click on Edit > Drill Through > FY16 for Forecast or FY17 for Plan.



Review the ProjectIDs that roll up to Sponsored, Recruitment, Retention or Fac/PI/Owner Activity > Export to Excel if necessary.

FY16

POV > 5200C_C > 2011364 > FY16 > 4000 > FP_Feed > YearTotal > D319008 > Forecast

[EXCEL](#)

FP_PROJECTS	YEARS	SCENARIO	VERSION	DEPTID	FUND	ACCOUNTS	PERIOD	PERIODNUMBER	PROJECT_DESC	PROJ_AMT
2011364: FP Sponsored NoNthcap	FY16	Forecast	FP_Feed	D319008	4000	5200C: Sponsored projects - subawards	Jun	12	125439A: R01CA187160: Aouzerat	16001
2011364: FP Sponsored NoNthcap	FY16	Forecast	FP_Feed	D319008	4000	5200C: Sponsored projects - subawards	Jun	12	125993A: 1K24NRD15812-01 FUKUOKA	1500

An updated Job Aid 207: Planning-Only Projects and the same functionality for the Employee cube is coming soon.