

## UPlan Weekly Digest

Friday, March 4, 2016

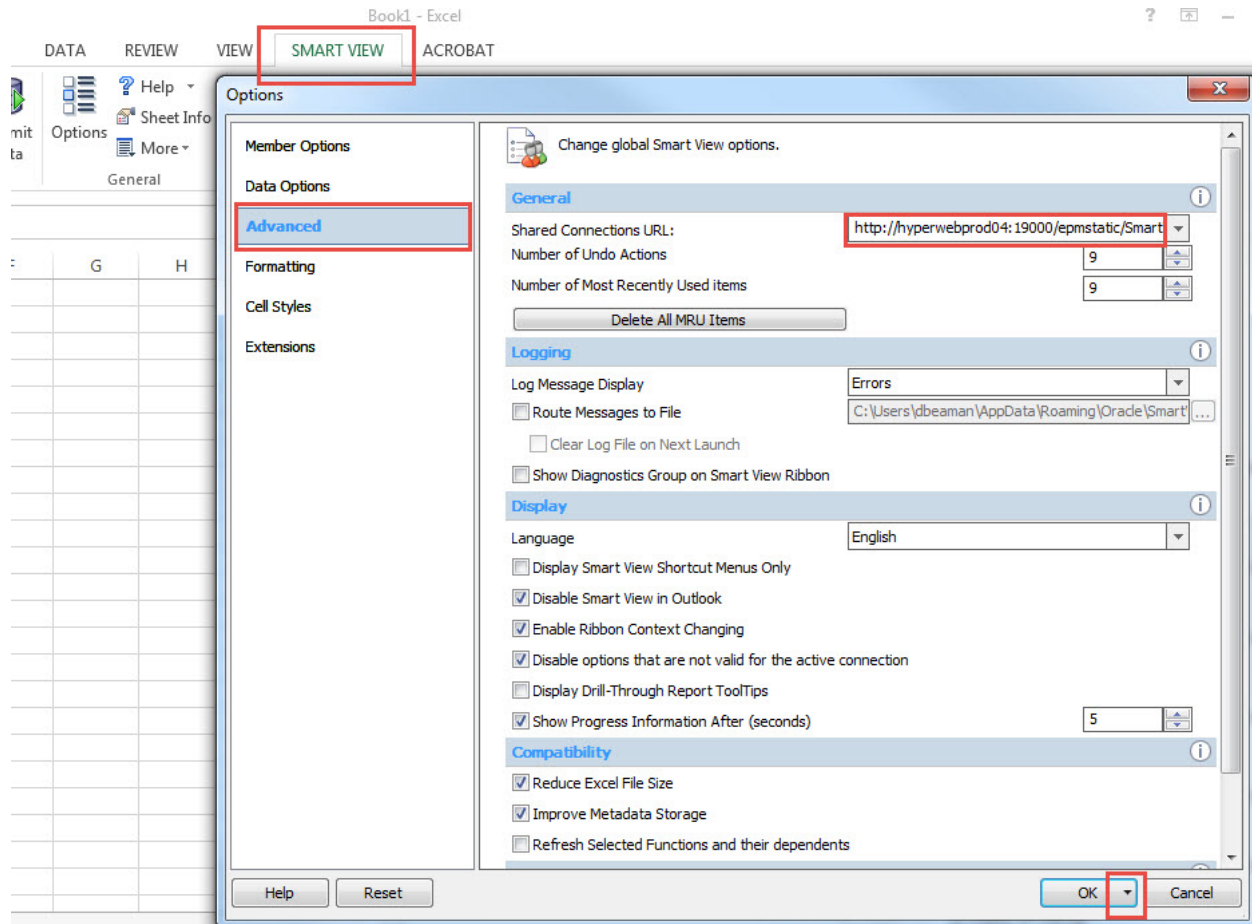
### Announcements:

- **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.

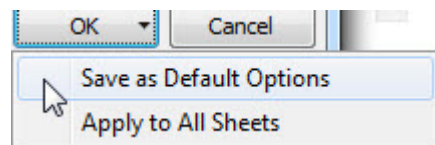
To update the URL:

Open Excel > click on Smart View ribbon > click on Options > Advanced Tab > insert this URL:

**[http://hyperwebprod04:19000/epmstatic/SmartView\\_Connections.xml](http://hyperwebprod04:19000/epmstatic/SmartView_Connections.xml)**



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

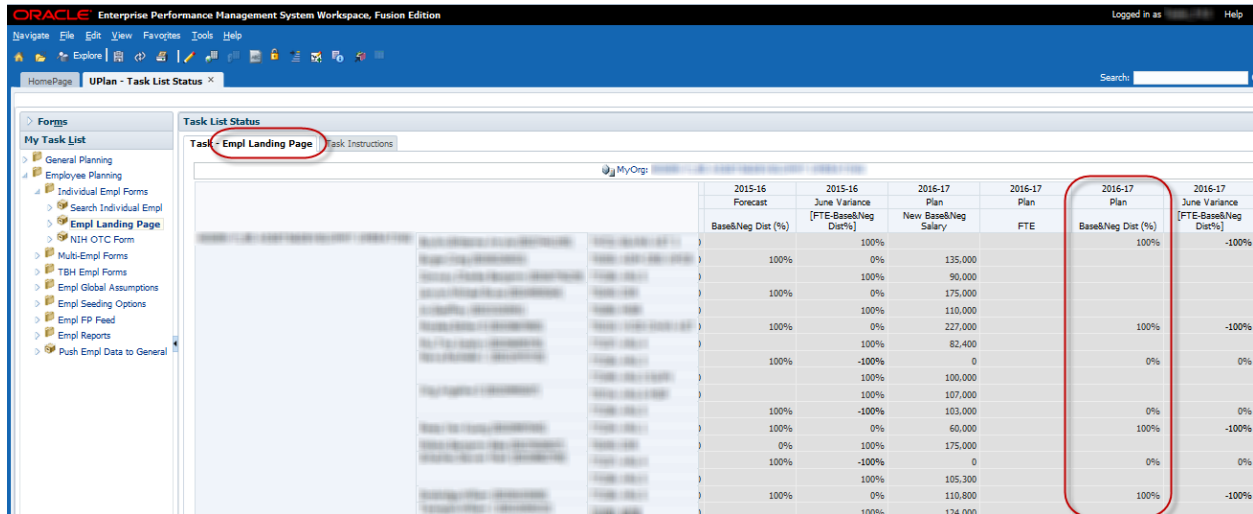


- **Updated UPlan Job Aids:** Several of the UPlan Job Aids have been updated for Spring 2016 at <https://brm.ucsf.edu/uplan-training-and-job-aids>. Training manuals and slides are also available for reference.
- **PeopleSoft Financial System Upgrade:** PeopleSoft is scheduled to be down starting March 24<sup>th</sup> and back up on March 28<sup>th</sup>. Certain UPlan nightly load processes related to chartfields will be affected during this time though we anticipate minimal impact. More information pertaining to the PeopleSoft upgrade can be found on the Controller's Office website: [http://controller.ucsf.edu/fin\\_systems/PS92upgrade.asp](http://controller.ucsf.edu/fin_systems/PS92upgrade.asp)

## Tips and Tricks:

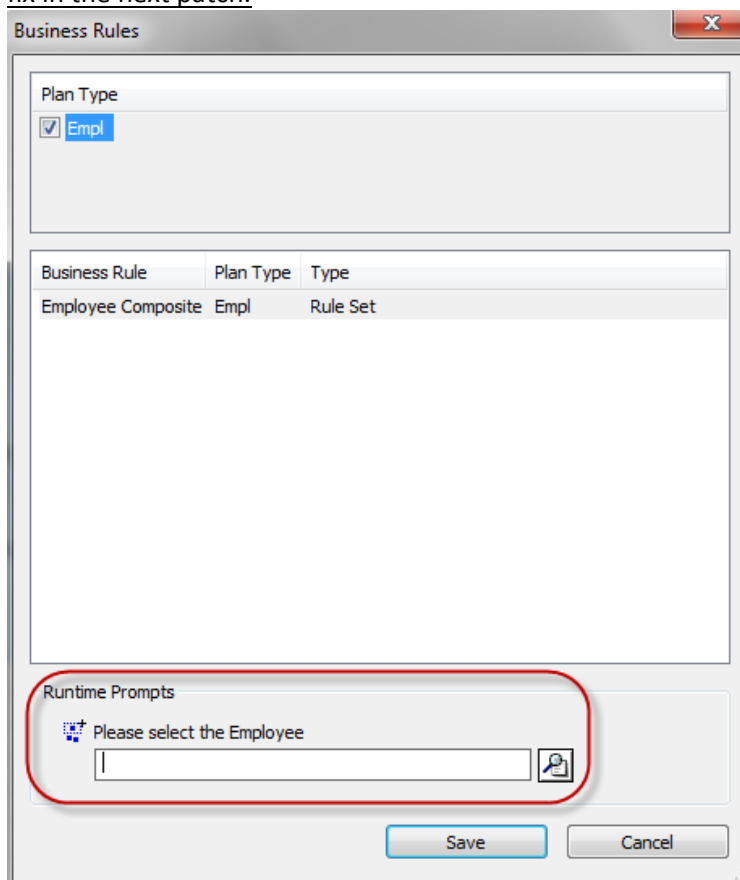
### Known Issues:

- **Employee Landing Form:** The 2016-17/Plan/Base&Neg Dist (%) column on the “Empl Landing Page” form may be missing the distribution percentages that were entered for employees. There is no impact to the integration of employee data to General Planning or any other employee forms or reports. This issue is under investigation.



2015-16 Forecast	2015-16 June Variance [FTE-Base&Neg Dist%]	2015-17 Plan New Base&Neg Salary	2015-17 Plan FTE	2016-17 Plan Base&Neg Dist (%)	2016-17 June Variance [FTE-Base&Neg Dist%]
100%	100%	135,000		100%	-100%
100%	0%	90,000			
100%	0%	175,000			
100%	100%	110,000			
100%	0%	227,000		100%	-100%
100%	100%	82,400			
100%	-100%	0		0%	0%
100%	100%	100,000			
100%	100%	107,000			
100%	-100%	103,000		0%	0%
100%	0%	60,000		100%	-100%
100%	100%	175,000			
100%	-100%	0		0%	0%
100%	100%	105,300			
100%	0%	110,800		100%	-100%
100%	100%	124,000			

- **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.



Business Rules

Plan Type

☒ Empl

Business Rule	Plan Type	Type
Employee Composite	Empl	Rule Set

Runtime Prompts

Please select the Employee

Save Cancel

- **Search Individual TBH form in Smart View only:** Similar to the Search Individual Employee form in Smart View issue (please see above), when planners use the Search Individual TBH form in Smart View to submit data, they are prompted to select and enter the TBH in order to submit the data successfully – this is a known Oracle bug. A work-around is to **use the Search Individual TBH form in the web**, which does not require planners to select the TBH. 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:

- **New FR reports with Tfr Accounts Together:** All Hyperion FR reports at account level C are now available with consolidated views of COA and corresponding Tfr accounts added together in UPlan web and Smart View.
  - **In UPlan Web:** Navigate to the Explore button > Click on General Reports – Tfr Accounts Together > Double-click on the report you wish to see. In the example below, General state appropriation is the total of 4000C and Tfr state appropriation. You can expand each line to show the COA account and corresponding Tfr from CmmtPlan. You can export these reports to Excel or access them directly in Smart View. Note: If you want to see the children accounts expanded you must expand them **before** exporting to Excel.

UPlan Diagnostic Report  
Current Year Forecast vs. Future Year Plans - Level C  
Report Run Date: 03/04/2016  
DeptID: 999999: Chancellor UCSF  
Fund: Total Funds  
Project: Total Projects

	Final Actual	Final Plan	Working Forecast	Working Plan	Variance: 2016-17 Plan vs 2015-16 Forecast (%)	Working Plan	Variance: 2017-18 Plan vs 2016-17 Plan (%)
	2014-15	2015-16	2015-16	2016-17		2017-18	2016-17 Plan (%)
<b>REVENUES:</b>							
General State Appropriations	187,942,227	193,438,520	197,921,128	115,784,460	(41.5%)	115,715,375	(0.1%)
4000C: General state appropriations	187,942,227	83,845,664	160,668,099	2,323,911	(98.6%)	-	(100.0%)
Tfr state appropriation	-	109,592,856	37,253,029	113,460,549	204.6%	115,715,375	2.0%
ICR & CCF Appropriations	-	249,319,557	131,167,037	257,445,436	96.3%	259,764,064	0.9%
MC-PSA Revenue	356,257,178	393,722,982	398,877,166	28,052	(100.0%)	-	(100.0%)
MC-Purchased Svcs Revenue	86,090,285	84,513,422	79,854,961	1,674,356	(97.9%)	-	(100.0%)
MC-Strategic Support	55,034,140	17,902,577	19,933,478	2,686,690	(86.5%)	-	(100.0%)
Other Clinical Revenue	116,036,048	109,201,090	97,301,740	20,173,547	(79.3%)	-	(100.0%)
Affiliation/Contract Revenue	93,984,511	93,310,155	87,062,573	2,062,072	(97.6%)	-	(100.0%)
Sales & Service Revenue	114,333,465	121,971,306	126,506,492	92,427,612	(26.9%)	20,815,180	(77.5%)
Recharge & Costed Central Act	217,594,596	248,457,198	214,401,469	178,304,819	(16.8%)	1,871,718	(99.0%)
Other Revenues	36,124,887	92,506,819	55,561,166	26,873,196	(51.6%)	19,438,736	(27.7%)
Student Tuition & Fees	56,918,737	102,454,213	96,829,094	72,847,754	(24.8%)	44,963,001	(38.3%)
Endowment Income	38,512,758	41,387,816	44,977,550	6,406,839	(85.8%)	-	(100.0%)
Gift Revenue	187,763,347	151,545,508	174,914,020	15,424,001	(91.2%)	73,000	(99.5%)
Sponsored Project Revenue exc SFGH	1,194,344,483	1,055,812,824	1,159,010,283	148,839,456	(87.2%)	-	(100.0%)
SFGH Affiliation Agreement	-	113,876,663	136,870,754	-	(100.0%)	-	-
Interest and Investment Income	117,796,438	27,458,571	202,944,348	37,073,929	(81.7%)	36,216,900	(2.3%)
Assessments Revenue	90,971,566	63,391,611	89,375,260	19,890,173	(77.7%)	90,208	(99.5%)
Patent Revenue	7,779,187	3,425,027	32,113,547	42,954	(99.9%)	-	(100.0%)
Medical Center Revenues	-	-	3,050,840,000	-	(100.0%)	-	-
<b>Revenue Total (including Revenue Transfers)</b>	<b>2,957,483,873</b>	<b>3,163,695,859</b>	<b>6,396,462,065</b>	<b>997,985,347</b>	<b>(84.4%)</b>	<b>498,948,182</b>	<b>(50.0%)</b>

- **In Smart View:** Navigate to Smart View ribbon in Excel > click on the Panel button > Shared Connections > Select Server to Proceed drop down menu > Select Reporting & Analysis Framework > Expand <http://hyperwebprod04:19000/raframework/browse/listSML> server > Expand General Reports > Tfr Accounts Together folder > Double-click on the report you wish to see. In the example below, General state appropriation is the total of 4000C and Tfr state appropriation. If you want to see the children accounts expanded you must expand them in the Preview Screen **before** clicking Finish. If you wish to modify the report after clicking Finish, simply open the report again (double click it) in the Smart View panel, expand the lines you wish to see, click Finish.

## Shared Connections



Reporting and Analysis Framework - Prod



http://hyperwebprod04:19000/raframework/browse

- Administration
- ArchiveFY15
- Broadcast Messages
- Commitment Reports
- Crystal Ball Workbooks
- General Reports - Tfr Accounts Separated
- General Reports - Tfr Accounts Together
- CY Forecast v Future Plans Tfr together - Level C
- CY Plan v Forecast Tfr together - Level C
- Scenario by DeptID Tfr together - Level C
- Scenario by Month Tfr together - Level C
- Scenario by Posting-level Fund Tfr together - Level C
- Scenario by Project Use Tfr together - Level C
- Scenario by Summary-level Fund Tfr together - Level C
- Sample Content
- Shared Workspace Pages
- System
- Users
- FAS CFP by Target DeptID

## Import Workspace Document

Current year Forecast vs. Future Year Plans - Level C

Report Run Date: 03/04/2016

DeptID: 999999: Chancellor UCSF

Fund: Total Funds

Project: Total Projects

	Final	Final	Working	Working
	Actual	Plan	Forecast	Plan
	2014-15	2015-16	2015-16	2016-17
<b>REVENUES:</b>				
General State Appropriations	187,942,227	193,438,520	197,921,128	115,700,000
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ICR & CCF Appropriations	-	249,319,557	131,167,037	257,000,000
MC-PSA Revenue	356,257,178	393,722,982	398,877,166	-
MC-Purchased Svc Revenue	86,090,285	84,513,422	79,854,961	1,000,000

- ☐ All Pages
- ☐ Split Pages across worksheets
- ☐ Refresh Using Workspace Point of View

Import Document As

Fully Formatted

Help

Next

Back

Finish

Cancel