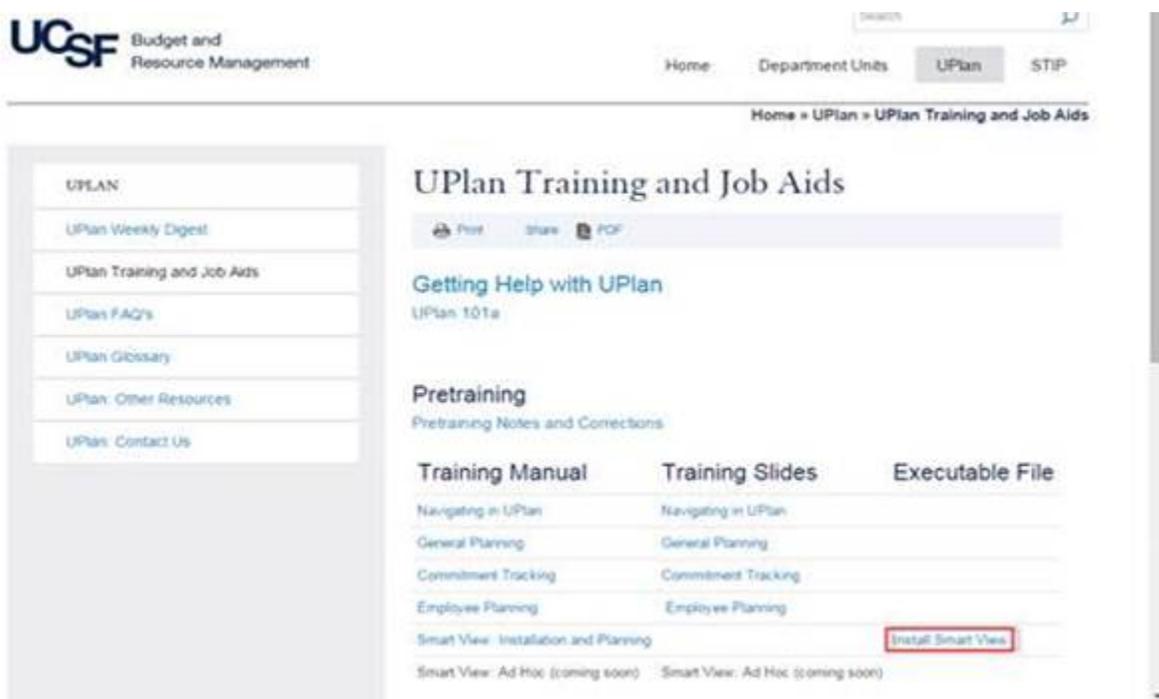
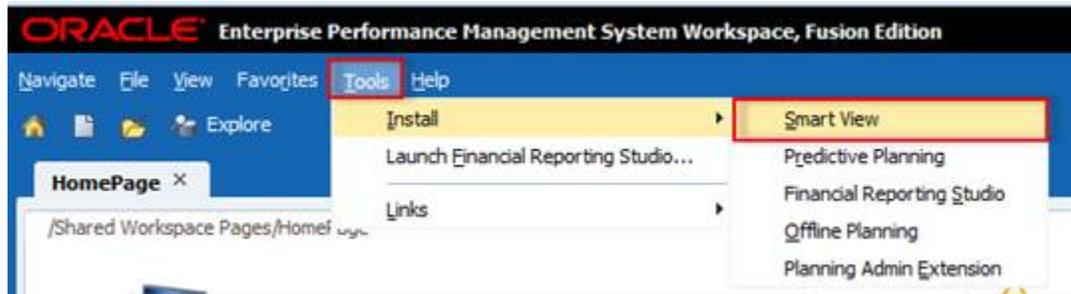


## UPlan Weekly Digest

Friday, March 18, 2016

### Announcements:

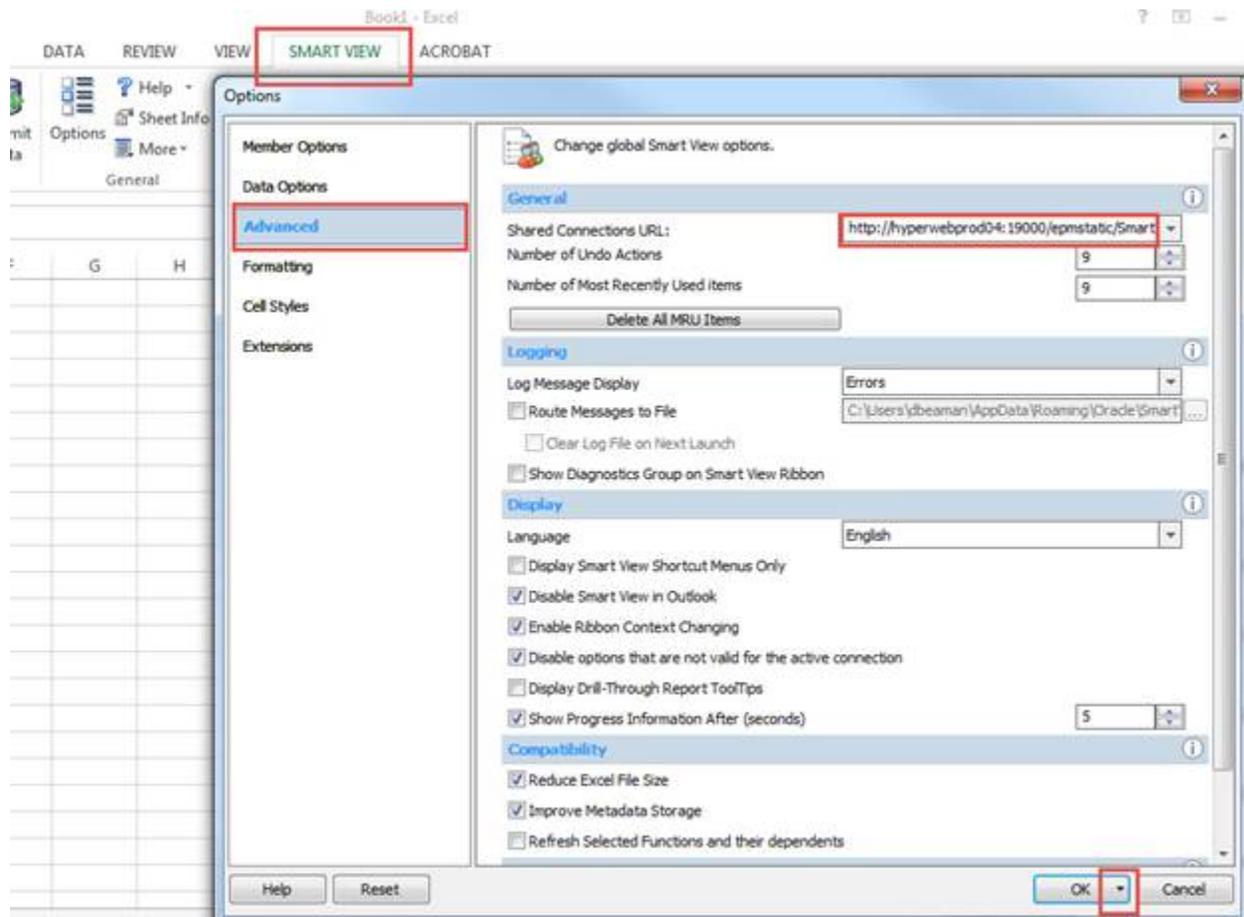
- **Upgrade to the newest version of Smart View:** Oracle has released a new version of Smart View that includes minor improvements. Please install this latest version at your earliest convenience. First, read the Install Instructions in the [Smart View Training Manual](#). To access the latest version 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.



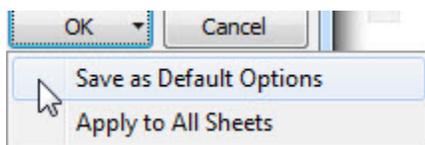
- **Smart View URL:** If you haven't already done so, please update your Smart View URL by following the below instructions. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section of the [March 4<sup>th</sup> Weekly Digest](#).

To update the URL:

1. 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)



2. 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>. UPlan nightly load processes related to certain 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)

#### Known Issues:

- **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. The resolution is being tested; please stay tuned for more information.
- **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.

	2015-18 Forecast	2015-18 June Variance (YTD-Budget) (%)	2016-17 Plan New Budgeting Salary	2016-17 Plan PTE	2016-17 Plan Budgeting (%)	2016-17 June Variance (YTD-Budget) (%)
	100%	0%	135,000		100%	-100%
	100%	0%	90,000		100%	-100%
	100%	0%	175,000		100%	-100%
	100%	0%	130,000		100%	-100%
	100%	0%	327,000		100%	-100%
	100%	0%	82,400		100%	-100%
	100%	-100%	0		0%	0%
	100%	100%	100,000		100%	0%
	100%	100%	107,000		100%	0%
	100%	-100%	103,000		0%	0%
	100%	0%	60,000		100%	-100%
	0%	100%	175,000		100%	-100%
	100%	-100%	0		0%	0%
	100%	100%	105,000		100%	-100%
	100%	0%	110,000		100%	-100%
	100%	100%	134,000		100%	-100%

- 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.

## Bug Fixes and Enhancements:

- New Account Detail by DFP:** Planners now have the ability to drill down to the “Account Detail by DFP” report to view the planning-level DFPs for a particular Account from any DFP level in the Revenue and Expense – Level C/E forms. This new feature allows planners to quickly view the detailed amounts for an Account at a higher level DFP.

To access the Account Detail by DFP:

- Go to General Planning ->Revenue and Expense – Level C/E
- Select and go to DFP at any level. For example, D100000-Total Funds-Total Projects
- Right-click on the desired account and select Account Detail by DFP
- The report will appear showing all the DFP that has data for that specific account chosen.

Right-click on any account that you want to see the details for and choose "Account Detail by DFP"

	2014-15	2015-16	2015-16	2015-16	2016-17	2017-18
	Actual	Actual	Plan	Forecast	Plan	Plan
	Final	Final	Final	Working	Working	Working
	> YearTotal					
4000C: General state appropriations_C	7,912	9,653,134	9,145,623			
4100C: ICR & COP appropriations_C	6,364	6,527,368	8,992,653			
4150C: MC-PSA revenue_C	0,228	77,125,650	79,798,778			
4151C: MC-purchased svcs revenue_C	8,347	17,848,797	14,733,947			
4152C: MC-strategic support_C	1,075	1,170,844	1,491,356			
4153C: Other clinical revenue_C	5,526	11,588,335	10,978,305			
4154C: Affiliation/contract revenue_C	9,297	18,963,284	20,191,122			
4200C: Sales & service revenue_C	8,057	13,410,814	16,974,328			
4250C: Recharge and costed central act	7,387	1,167,232	1,136,464			
4601C: Other revenues_C	8,828	271,808	309,430			
4350C: Endowment income_C	0,032	4,937,147	7,715,747			
4351C: Gift revenue_C	2,946	26,254,189	20,754,342			
4500C: Sponsored project revenue_C	3,212	212,315,251	214,320,711			
4140C: SPGH affiliation agreement_C	0,331	22,600,690	24,933,882			
4550C: Interest and investment income	1,406	1,774,774	1,583,197			
4600C: Assessments_C	5,833		255,833			
Total Revenue	9,481	425,609,278	433,305,720			
5000C: Faculty salaries_C	6,490	117,053,152	120,154,207		2,238,652	
5010C: Faculty bonuses & incentives_C	10,993,098	2,281,423	231,756			
5030C: Faculty benefits_C	24,047,387	16,236,880	27,669,639		25,460,093	645,751
5020C: Non-faculty academic salaries_C	41,521,199	29,596,538	39,185,482		42,658,365	259,370
5040C: Non-faculty academic benefits_C	3,457,232	3,839,412	5,022,104		5,513,446	106,898
5050C: Staff salaries and overtime_C	54,635,325	37,181,648	58,007,444		56,517,252	644,102
5060C: Staff benefits_C	21,103,981	14,375,709	22,847,690		21,991,467	263,345
5200C: Sponsored projects - subawards_C	42,573,337	23,613,585	39,427,694		36,756,150	
5202C: Sponsored proj - F&A recovery_C	42,135,785	28,055,775	41,830,513		42,032,613	
5300C: Occupancy expense_C	1,968,187	1,074,478	4,527,103		2,583,512	

	2014-15	2015-16	2015-16	2015-16	2016-17	2017-18	
	Actual	Actual	Plan	Forecast	Plan	Plan	
	Final	Final	Final	Working	Working	Working	
	> YearTotal						
4000C: General state appropriations_C	12,500	14,473	672,117	3,054,427	3,787,663	3,692,684	3,685,224
1940: State general intramural	12,500						4,187
1900: State educational appror							
0000112: Residents - Dept Funded							
1111111: General Unspecif							
2011300: DEPT SUPPORT							
1111111: General Unspecif	625,340	418,440	426,160	629,180			
1900: State educational appror	30,756	20,301	30,756	30,753			
1940: State general intramural	1,100,712	687,263	1,577,712	1,193,187			
1900: State educational appror	639,651	426,838	639,653	639,653			
0000111: Fellows - Dept Funded	38,680						
1111111: General Unspecif	47,136	30,942	75,818	75,814			
1900: State educational appror	836,172	596,468	840,379	836,584			
1940: State general intramural	155,875		135,075	11,692			
Total DeptD	6,383,430	5,937,602	6,815,124	6,398,682			

- General Planning Global Assumptions:** When seeding Year 1 and 2, the Global Assumptions calculations in General Planning now include Accounts **5300C: Occupancy Expense** and **5320C: Utilities** in the seeding rules. [UPlan Job Aid 209](#) has been updated to reflect the change.