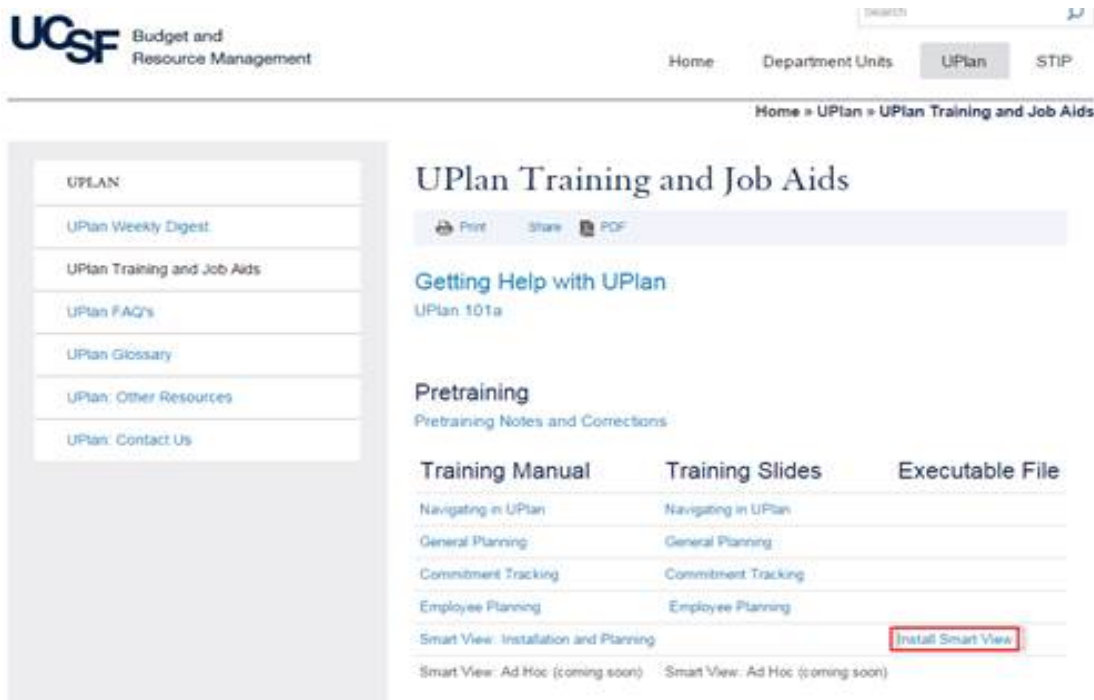
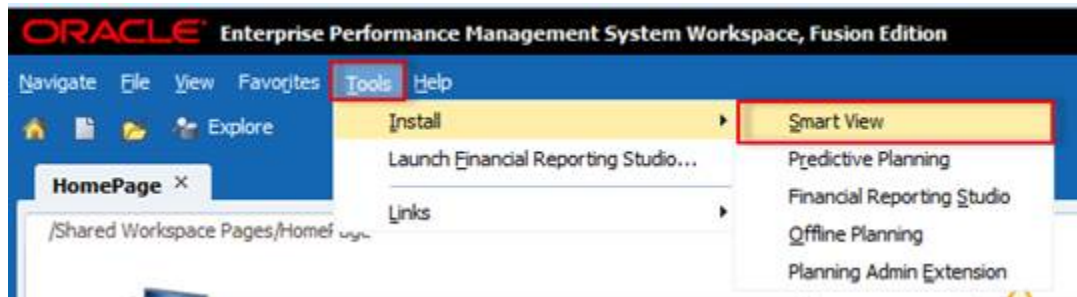


# UPlan Weekly Digest

Thursday, March 24, 2016

## Announcements:

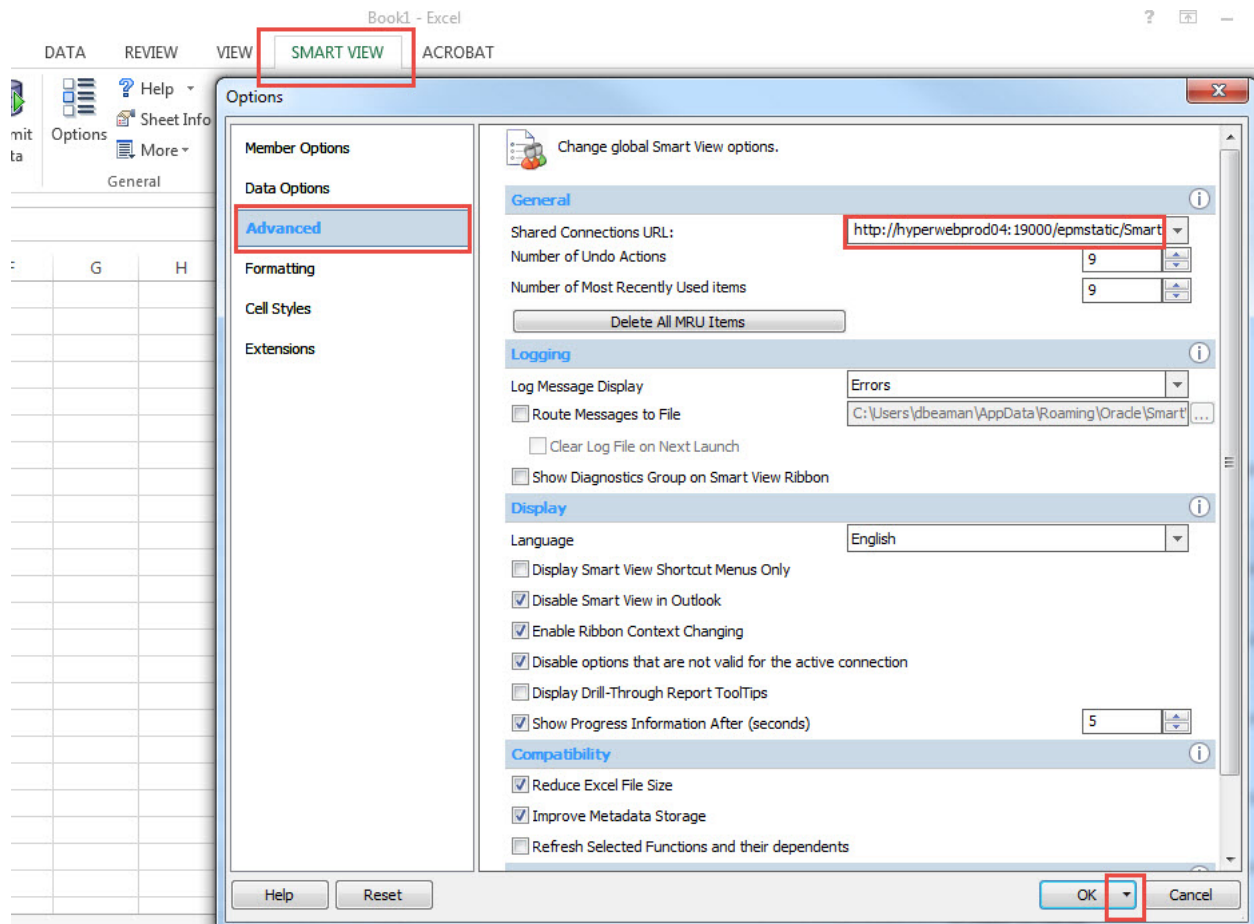
- **Employee SOM Seeding Year 1 and 2:** The Employee Seeding rules for SOM for Year 1 and 2 were run this morning, March 24. This allows planners to accurately plan distributions for employees with Home DeptIDs below D100000. If you have distribution percentages for these employees, these seeding rules may update the salary and benefit numbers that flow to General.
- **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.



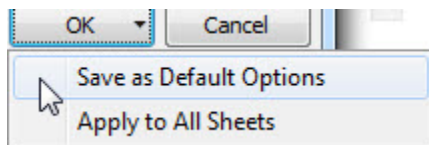
- **Smart View URL:** If you haven't already done so, please update your Smart View URL by following the below instructions. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section of the [March 4<sup>th</sup> Weekly Digest](#).

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 today, 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.

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

Runtime Prompts

Please select the Employee

- 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.