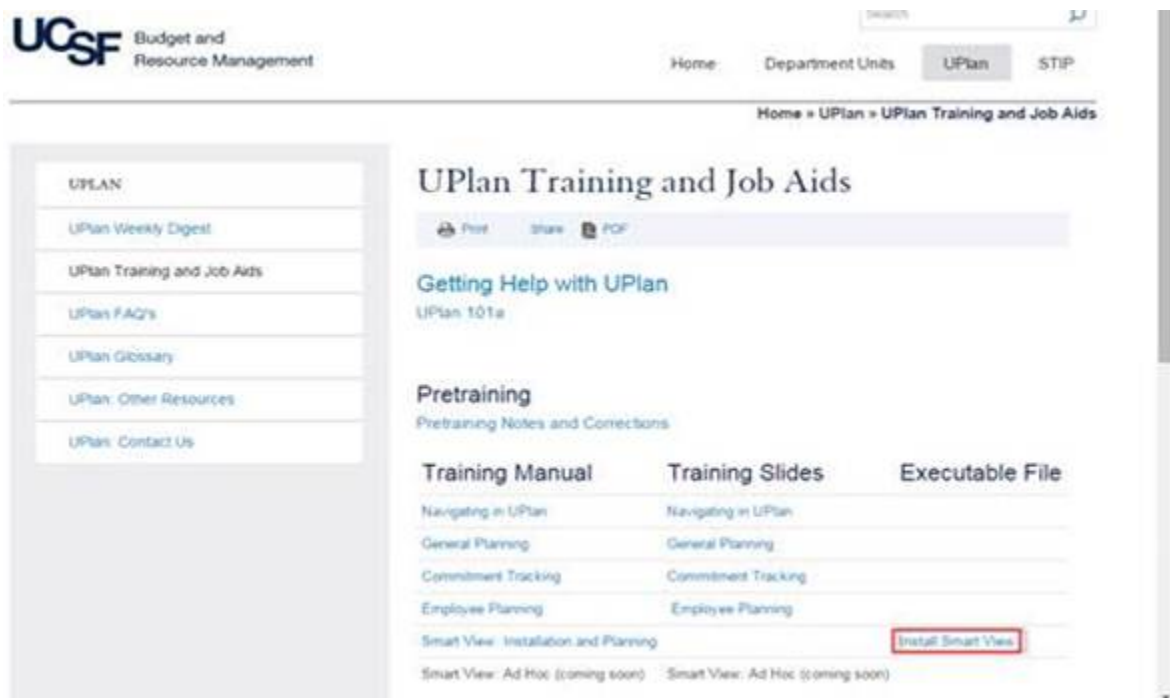
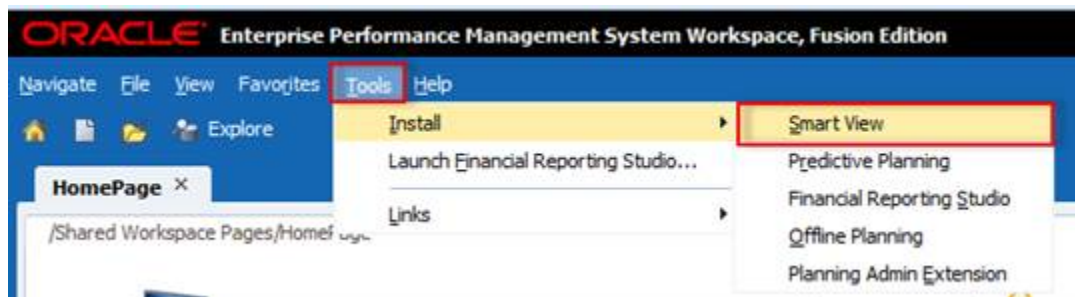


UPlan Weekly Digest

Friday, April 1, 2016

Announcements:

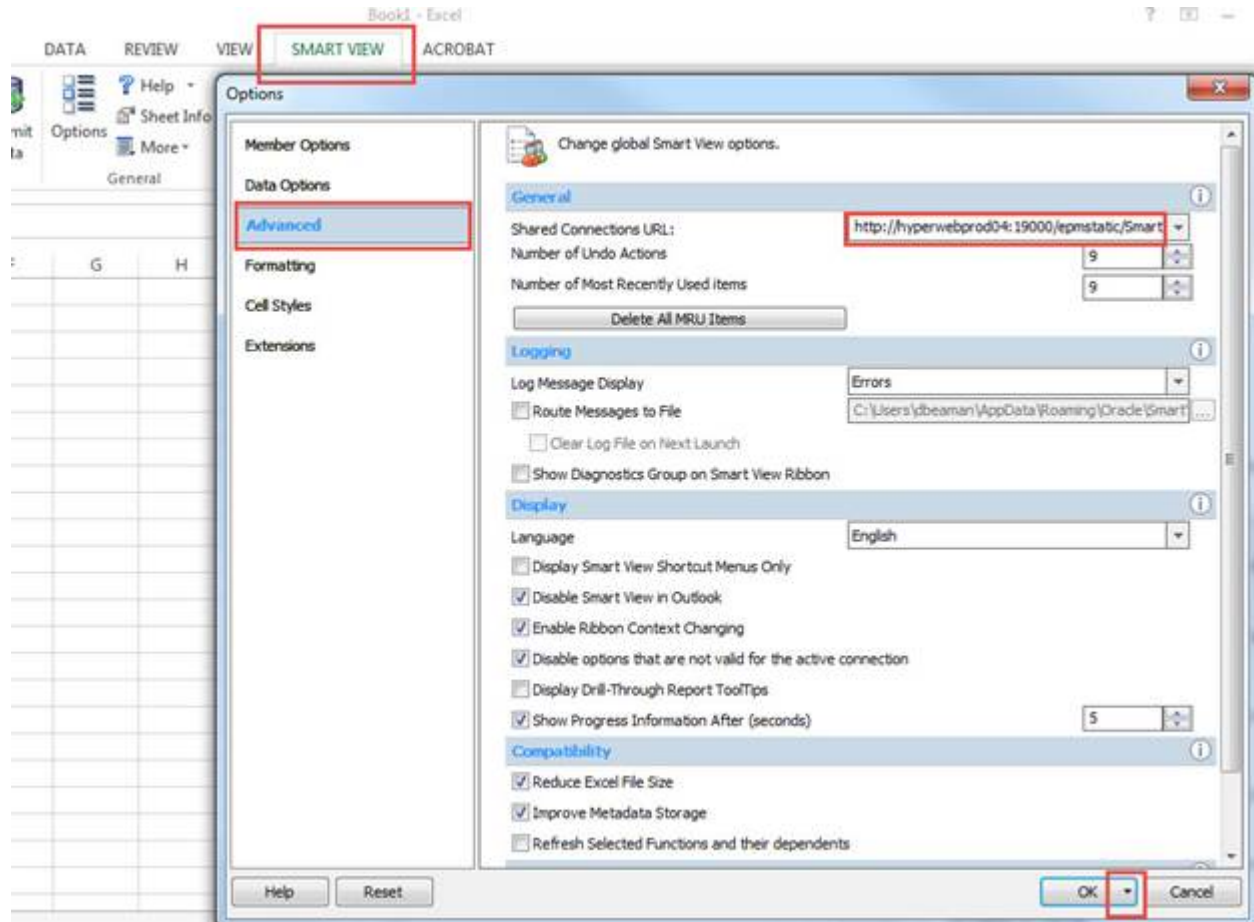
- **PeopleSoft Financial System Upgrade:** The UPlan nightly load processes related to certain chartfield updates has resumed with the PeopleSoft 9.2 upgrade that went live on Monday, March 28th. More information pertaining to the PeopleSoft upgrade can be found on the Controller's Office website: http://controller.ucsf.edu/fin_systems/PS92upgrade.asp
- **Employee SOM Seeding Rules Run for Year 1 and 2:** The Employee Seeding rules for SOM for Year 1 and 2 were run Friday, 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 have updated the salary and benefit dollars that flow to General.
- **Upgrade to the newest version of Smart View:** Oracle released a new version of Smart View that includes minor improvements back in March. If you haven't already done so, 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.



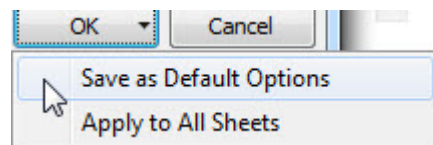
- **Smart View URL:** If you haven't already done so, please update your Smart View URL by following the below instructions. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section of the [March 4th Weekly Digest](#).

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



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



- **Updated UPlan Training Manuals and Job Aids:** Several of the training materials have been updated for Spring 2016 at <https://brm.ucsf.edu/uplan-training-and-job-aids>.

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.

Bug Fixes and Enhancements:

- New Account Detail by DFP Report:** As of March 18th, planners are able 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 report:

- 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

Task - Revenue and Expense - Level C

	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	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
Completion Trading						
4000: General state appropriations_C	7,912	9,553,134	9,145,623			
4100: ICR & COF appropriations_C	6,864	6,527,368	8,992,653			
4150: MC-PSA revenue_C	0,228	77,125,650	79,798,778			
4151: MC-purchased svcs revenue_C	4,347	17,848,797	14,733,947			
4152: MC-strategic support_C	1,075	1,170,844	1,491,356			
4153: Other clinical revenue_C	5,526	11,588,335	10,978,305			
4154: Affiliation/contract revenue_C	9,297	18,963,284	20,191,122			
4200: Sales & service revenue_C	4,057	13,410,814	16,974,328			
4250: Recharge and costed central act	7,307	1,167,232	1,136,464			
4601: Other revenues_C	8,828	271,808	309,430			
4350: Endowment income_C	0,032	4,937,147	7,715,747			
4351: Gift revenue_C	2,946	26,254,189	20,754,342			
4500: Sponsored project revenue_C	3,212	212,315,251	214,320,711			
4140: SPGH affiliation agreement_C	0,331	22,600,650	24,933,882			
4550: Interest and investment income	1,406	1,774,774	1,583,197			
4600: Assessments_C	5,833		255,833			
Total Revenue	9,481	425,609,278	433,305,720			
5000: Faculty salaries_C	6,490	117,053,152	120,154,207		2,228,652	
5010: Faculty bonuses & incentives_C	6,999,008	3,381,423	231,756		3,258,675	
5030: Faculty benefits_C	24,047,387	16,236,880	27,669,639		25,460,093	645,751
5020: Non-faculty academic salaries_C	41,521,199	29,596,538	39,185,482		42,658,365	299,370
5040: Non-faculty academic benefits_C	5,457,232	3,839,412	5,022,104		5,513,446	106,898
5050: Staff salaries and overtime_C	54,635,325	37,181,648	58,007,444		56,517,252	644,102
5060: Staff benefits_C	21,103,981	14,375,709	22,847,690		21,991,467	263,345
5200: Sponsored projects - subwards_C	42,573,337	23,613,585	39,427,694		36,756,150	
5202: Sponsored proj - F&A recovery_C	42,135,785	28,055,775	41,930,513		42,032,613	
5300: Occupancy expense_C	1,968,187	1,074,478	4,527,103		2,583,512	

Account Detail by DFP

Revenue & Expense Level_C Accounts	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	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
4000: General state appropriations_C						
2540: State general intramural	12,900		12,900	4,187		
2900: State educational appor	14,473					
1000111: Residents - Dept Funded	672,157					
1111111: General Unspecif	3,054,427	3,797,603	3,892,684	8,885,224		
2011200: DEPT SUPPORT	61,333					
1111111: General Unspecif	629,380	419,440	429,160	629,160		
1111111: General Unspecif	30,756	20,301	30,756	30,753		
2011264: PP Sponsored NatH&Cap	1,100,712	887,263	1,177,712	1,193,187		
1000000: MC GHE residents fellows	679,651	428,238	678,053	678,053		
1000111: Fellows - Dept Funded	28,660					
1111111: General Unspecif	47,136	30,942	75,818	75,814		
1111111: General Unspecif	828,173	594,468	840,376	838,594		
2011264: PP Sponsored NatH&Cap	135,075		135,075	13,682		
Total DeptCD	6,383,630	5,927,602	6,893,124	6,746,632		