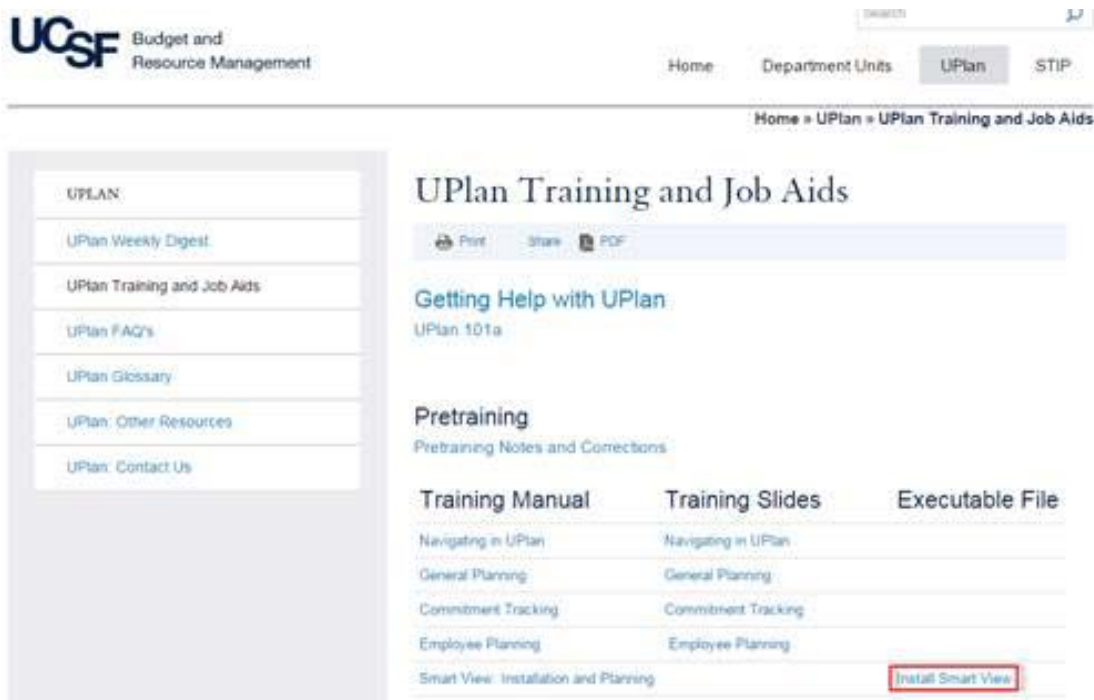
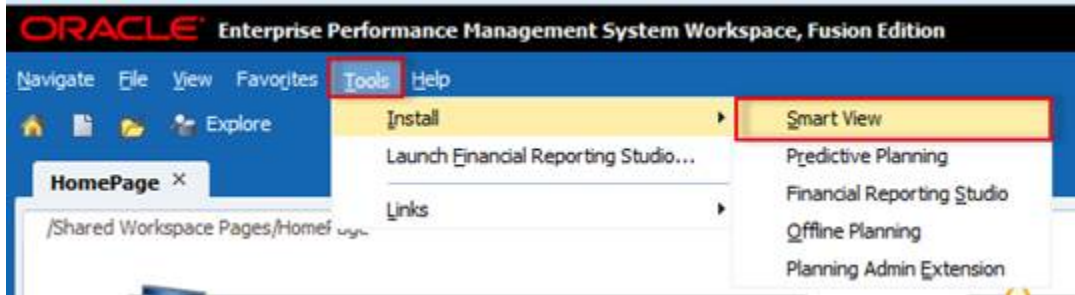


UPlan Weekly Digest

Friday, April 8, 2016

Announcements:

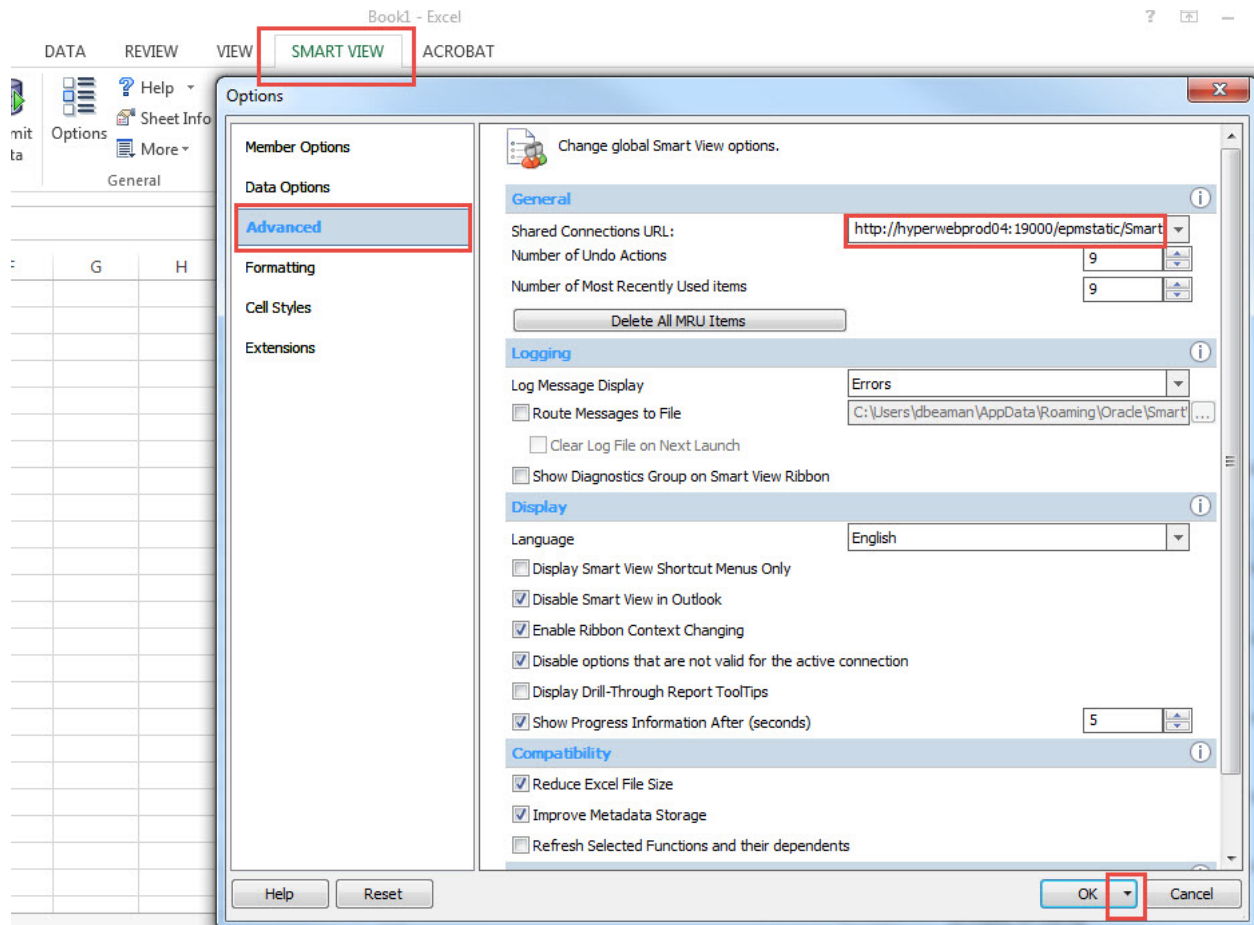
- **Upgrade to the newest version of Smart View:** Oracle released a new version of Smart View that includes minor improvements back in March. If you haven't already done so, please install this latest version at your earliest convenience. First, read the Install Instructions in the [Smart View Training 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.



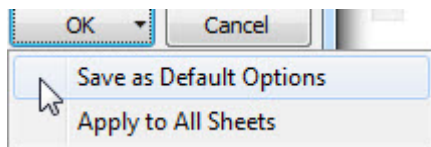
- **Smart View URL:** If you haven't already done so, please update your Smart View URL by following the below instructions. Updating the URL solves the Smart View FR Report issue as outlined in the Bug Fixes/Enhancements section of the [March 4th Weekly Digest](#).

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. There is an Oracle bug associated with the proposed resolution so this issue will not be resolved until Oracle releases the fix in the next patch.
- **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 Dier%]	2016-17 Plan New Base&Neg Salary	2016-17 Plan FTE	2016-17 Plan Base&Neg Dier (%)	2016-17 June Variance [FTE-Base&Neg Dier%]
	100%	0%	135,000		100%	-100%
	100%	0%	90,000			
	100%	0%	175,000			
	100%	0%	110,000			
	100%	0%	227,000		100%	-100%
	100%	0%	82,400			
	100%	-100%	0		0%	0%
	100%	0%	100,000			
	100%	0%	107,000			
	100%	-100%	103,000		0%	0%
	100%	0%	60,000		100%	-100%
	0%	100%	175,000			
	100%	-100%	0		0%	0%
	100%	0%	105,300			
	100%	0%	110,800			
	100%	0%	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 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 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 List Status

Task - Revenue and Expense - Level C

ContextEntity: 4000C: General state appropriations_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
4000C: General state appropriations_C	9,283,632	5,927,912	9,653,134	9,145,623		
4100C: ICR & CCF appropriations_C	6,864	6,527,368	8,992,653			
4150C: MC-PSA revenue_C	0,228	77,125,650	79,788,778			
4151C: MC-purchased svcs revenue_C	4,347	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	4,057	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: SFGH affiliation agreement_C	0,331	22,600,650	24,933,882			
4550C: Interest and investment income_C	1,606	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	110,154,207	2,238,652		
5010C: Faculty bonuses & incentives_C	8,493,338	3,721,423	231,756	3,258,675		
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	5,457,232	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 - subwards_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	41,930,513	42,032,613		
5300C: Occupancy expense_C	1,968,187	1,074,478	4,527,103	2,583,512		

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

Task List Status

Task - Revenue and Expense - Level C

Revenue & Expense Level_C Accounts: Account Detail by DFP

ContextEntity: 4000C: General state appropriations_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
4000C: General state appropriation	12,500		12,500	4,167		
1940: State general intramural	14,473					
1000111: Fellows - Dept Funded	672,157					
1000112: Residents - Dept Funded	5,054,427	3,787,663	5,692,684	5,685,224		
1111111: General Unspecific	61,333					
2011320: DEPT SUPPORT	629,160	419,440	629,160	629,160		
1111111: General Unspecific	30,756	20,501	30,756	30,753		
1940: State general intramural	1,100,712	667,263	1,577,712	1,193,167		
1000001: MC GME residents fellows	639,051	426,035	639,053	639,053		
1000111: Fellows - Dept Funded	28,660					
1111111: General Unspecific	47,156	50,542	75,816	75,814		
1900: State educational appropr	838,172	556,468	840,379	836,594		
1111111: General Unspecific	155,075		155,075	51,692		
1940: State general intramural	155,075					
2011364: FP Sponsored NonHcap	9,283,632	5,927,912	9,653,134	9,145,623		
Total DeptTD						
Total Funds						
Total Projects						