

UPlan Weekly Digest

Friday, April 22, 2016

Announcements:

- **Drill Through Reports and Planning by Project Webinars:** Drill Through is now live in the R&E forms in General Planning. There is one webinar left to demo the new features; your control point coordinator should already have forwarded Outlook calendar invitations for the dates below from the UPlan team. A new training manual has been created for Planning by Project and is available on the [UPlan Training and Job Aids](#) page. See the Bug Fixes and Enhancements section below for more information.
 - Monday, 4/25, 11:00-11:30am

Tips & Tricks:

- Have you checked which version of Firefox you have and if your preferred browser is compatible with UPlan? If not, be sure to do so if you haven't logged in to UPlan in a while. There are two job aids available to reference - UPlan 201: Browser Setting for PC and UPlan 202: Browser Setting for Mac on the [UPlan Training and Job Aids](#) page.
- Back in March 2016, a new version of Smart View and updated URL was released to access UPlan. Check out the [main UPlan page](#) under Tips and Tricks to see if your version of Smart View has been updated and if you are using the correct link.

Bug Fixes and Enhancements:

- **RESOLVED – General Global Assumptions % when Seeding Year 2:** The global assumptions rule was incorrectly applying the global assumptions % twice and was resolved on Monday, April 18th. If you seeded with global assumptions for Year 2 prior to April 18th, you can either:
 - Re-seed Year 2
 - OR verify that your numbers are correct for the seeded DFPs.To reference the account/fund/project use global assumptions matrix, see [UPlan Job Aid 209](#).
- **NEW - Drill Through for Historical Forecast Detail:** Drill Through has been implemented in the Forecast Working column to see historical monthly forecast snapshots sent to MyReports on the 14th calendar day starting with the February and March 2016 forecasts (April is coming soon). To view the historical snapshot from any DFP:

- In UPlan Web: click any intersection in Forecast Working with a triangle > navigate to the UPlan Edit > Drill Through > Feb/Mar/Apr Forecast.

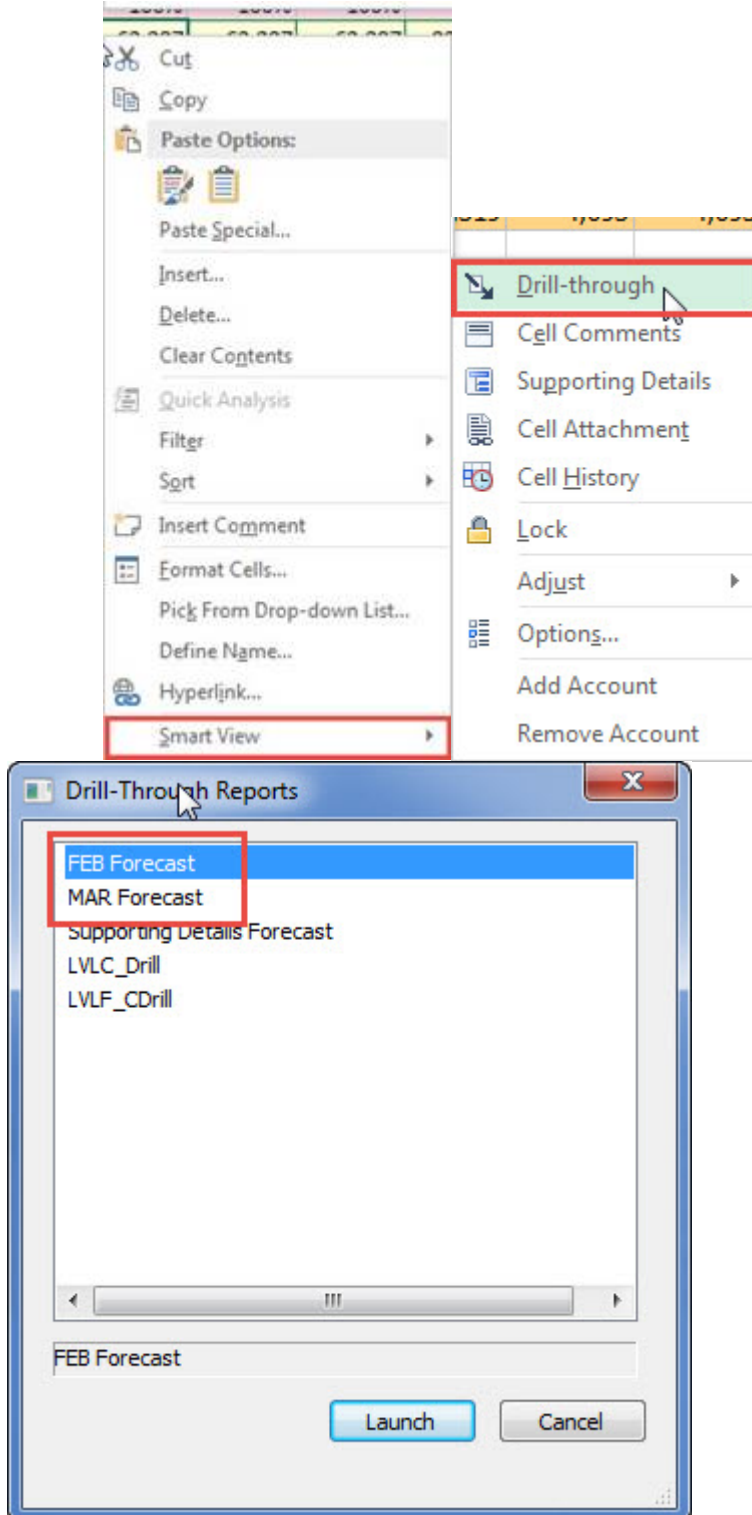
The screenshot shows the UPlan Web interface with a large data table. The table has columns for months (Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May, Jun) and years (2014-15, 2015-16). A 'Drill Through' button is highlighted in the top left corner of the table area.

- In Smart View: Planners have two options to view the detail:
 1. Click any intersection in Forecast Working with a green border > navigate to the Planning ribbon > Drill Through > Feb/Mar/Apr Forecast

The screenshot shows the Smart View interface with a financial forecast table. The table has columns for months (A, N, AA, AN, AO, AP, AQ, AR, AS, AT, AU, AV, AW, AX, AY) and rows for various financial categories. A 'Drill-through' button is highlighted in the ribbon. A 'Drill-Through Reports' dialog box is open, showing a list of reports with 'FEB Forecast' and 'MAR Forecast' highlighted.

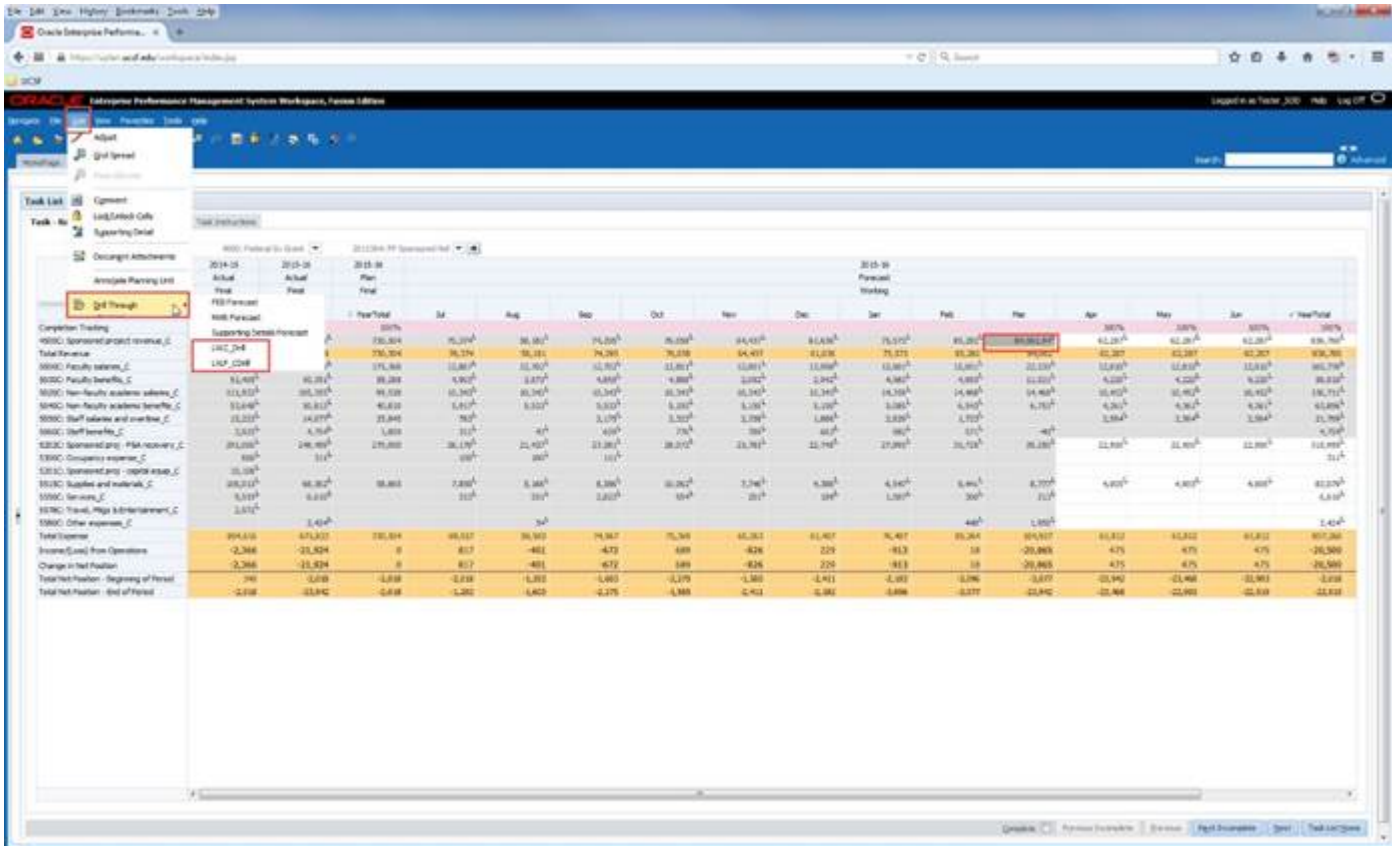
	A	N	AA	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	
1	2014-15			2015-16												
2	Actual	Actual	Plan													
3	Final	Final	Final													
4	+YearTota	+YearTota	+YearTota													
5	Completion Tracking		100%											100%	1	
6	4500C: Sp	802,249	649,899	730,504	70,374	58,18							85,282	84,062	62,287	62
7	Total Rev	802,249	649,899	730,504	70,374	58,18							85,282	84,062	62,287	62
8	5000C: Fac	148,512	127,308	175,368	12,867	12,70							15,001	22,535	12,810	12
9	5030C: Fac	51,495	43,351	58,268	4,903	2,61							4,993	11,021	4,220	4
10	5020C: No	111,933	105,355	99,538	10,343	10,34							14,468	14,468	10,452	10
11	5040C: No	53,648	50,813	40,810	5,917	5,53							6,543	6,753	4,361	4
12	5050C: Sta	15,223	14,077	25,845	783								1,723		2,564	2
13	5060C: Sta	3,925	4,754	1,809	311								571	-41		
14	5202C: Sp	291,000	248,459	270,000	26,170	21,43							31,725	39,250	22,500	22
15	5300C: Oc	666	311		100	10										
16	5201C: Sp	10,108														
17	5515C: Su	106,013	68,362	58,865	7,850	5,16							9,441	8,777	4,905	4
18	5550C: Ser	9,519	6,610		313	55							360	213		
19	5578C: Tra	2,572											440	1,950		
20	5580C: Other expens	2,424														
21	Total Expe	804,616	671,823	730,504	69,557	58,58							85,264	104,927	61,812	61
22	Income/(-2,366	-21,924	0	817	-401	-672	689	-826	229	-913	18	-20,865	475		
23	Change in	-2,366	-21,924	0	817	-401	-672	689	-826	229	-913	18	-20,865	475		
24	Total Net	348	-2,018	-2,018	-1,202	-1,603	-2,275	-1,585	-2,411	-2,182	-3,096	-3,077	-23,942	-23		
25	Total Net	-2,018	-23,942	-2,018	-1,202	-1,603	-2,275	-1,585	-2,411	-2,182	-3,096	-3,077	-23,942	-23,468	-22	

2. Right-click on any intersection in Forecast Working with a green border > Smart View > Drill Through > Feb/Mar/Apr Forecast



- **NEW - Drill Through for “Planning by Project” Detail:** Drill Through has been implemented in Actual Final and Forecast/Plan Working to see ProjectID level detail for projects below “FP Projects” in the UPlan project hierarchy. This enables planning by individual project IDs for sponsored, recruitment, retention and other faculty/PI/owner activity projects. A [new training manual](#) has been created and there will be three webinars to demo how to use the new features next week. See the announcements section for webinar details.
 - **In UPlan Web:** Drill Through is enabled in the Actual Final and Forecast/Plan Working columns on the R&E forms. Intersections allowing drill through have two black lines creating a triangle in the upper-

right corner. To view the detail, click any intersection with this triangle > navigate to the UPlan Edit > Drill Through > Lvl C/E or F Drill.



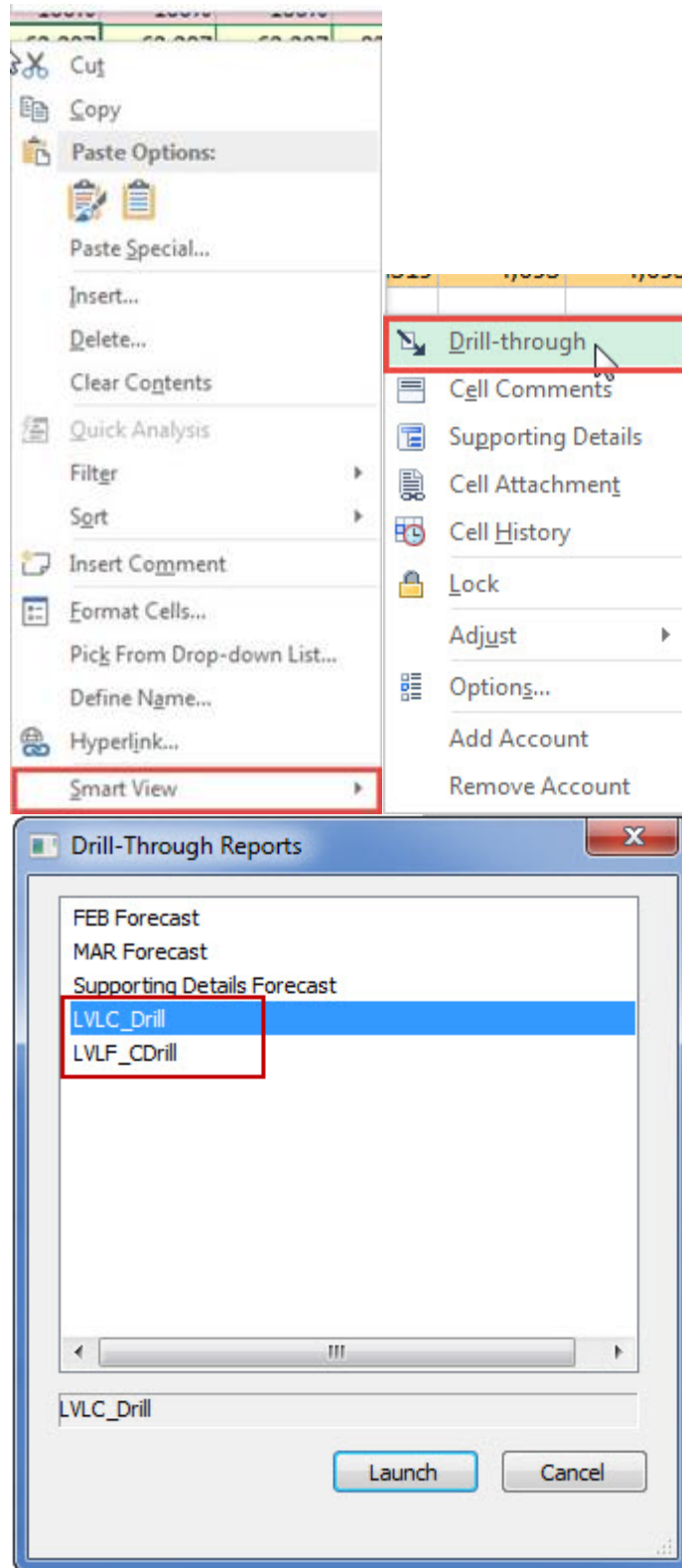
- In Smart View: Drill Through is enabled in the Actual Final and Forecast/Plan Working columns on the R&E forms. Intersections allowing drill through have green border lines. Planners have two options to view the detail:

1. Click any intersection with a green border > navigate to the Planning ribbon > Drill Through > Lvl C/E or F Drill

The screenshot displays the Microsoft Excel interface. At the top, the ribbon shows the 'Planning' tab with the 'Drill-through' button highlighted in a red box. Below the ribbon, the spreadsheet shows a budget for 'POV Revenue_Expense Level_C Accounts - uplan.ucsf.edu_UPlan_1'. The spreadsheet is organized into columns for 2014-15 and 2015-16, with rows for various budget categories. A 'Drill-Through Reports' dialog box is open, listing several report options: 'FEB Forecast', 'MAR Forecast', 'Supporting Details Forecast', 'LVL_C_Drill', and 'LVL_F_CDill'. The 'LVL_C_Drill' and 'LVL_F_CDill' options are highlighted with red boxes. The 'Launch' and 'Cancel' buttons are visible at the bottom of the dialog box.

	2014-15					2015-16							
	Actual	Actual	Plan			Forecast							
	Final	Final	Final										
	+YearTota	+YearTota	+YearTota										
5	Completion Tracking		100%							100%	1		
6	4500C: Sp	802,249	649,899	730,504	70,374	58,18				85,282	84,062	62,287	62
7	Total Rev	802,249	649,899	730,504	70,374	58,18				85,282	84,062	62,287	62
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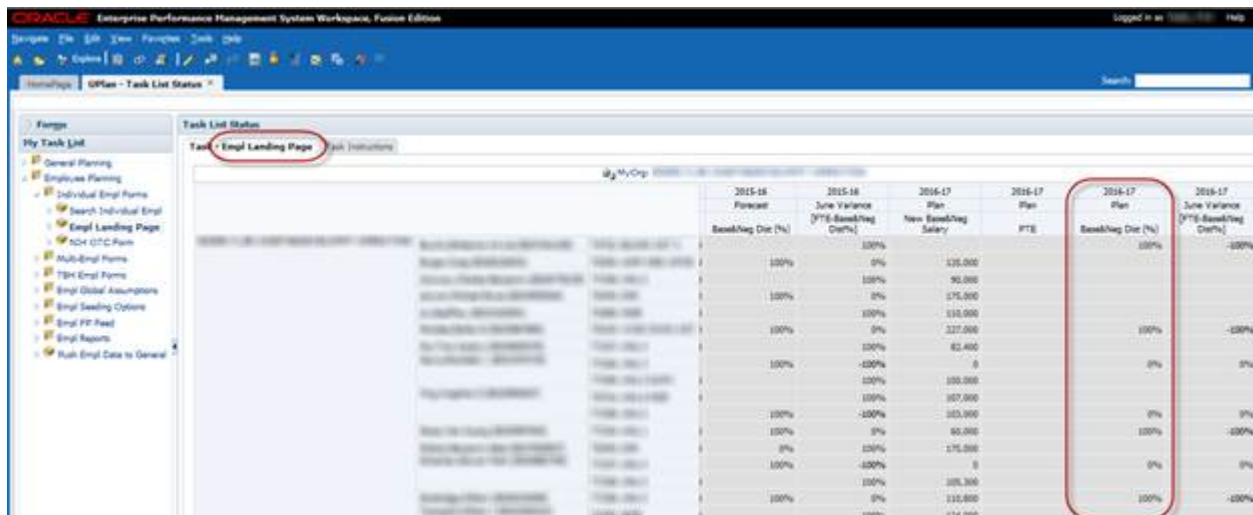
2. Right-click on any intersection with a green border > Smart View > Drill Through > Lvl C/E or F Drill



- **NEW - Drill Through for Supporting Details Forecast:** Drill Through has been implemented in Forecast/Plan Working columns in the R&E Forms to see instantaneous reports of supporting detail when planning by project on planning-level DFPs. Navigation to view the drill through for supporting details is similar to the Drill Through for historical forecast and planning by project. A [new training manual](#) has been created and there will be three webinars to demo how to use the new features. See the announcements section for webinar details.

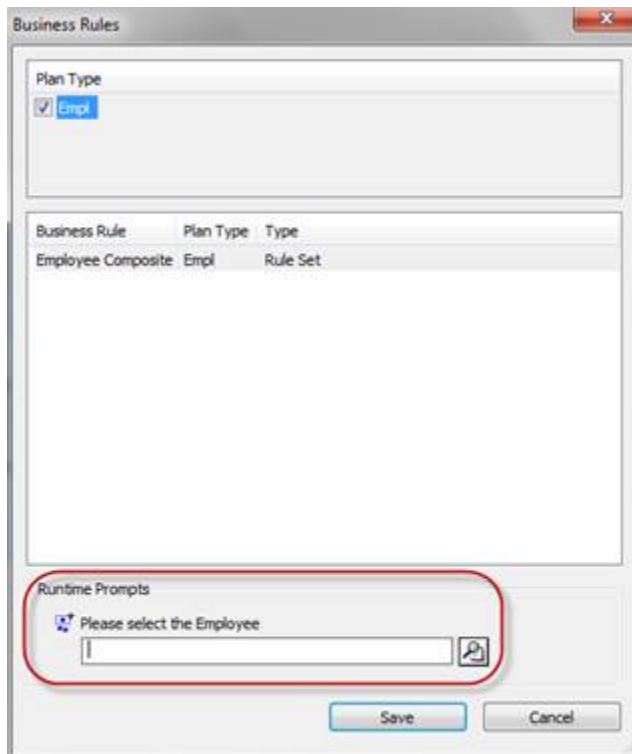
Known Issues:

- **Salary and Benefit Distributions for Lateral Transfers:** There is an issue with the distribution dollar calculation for employees with lateral transfers but a different salary level (i.e. same title code, different salary) from one Home DeptID to another Home DeptID. The dollars are currently incorrectly calculating from the old Home DeptID salary level. We are investigating this issue.
- **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 continues to be under investigation though seems to have impacted only one DeptID.



	2015-18 Forecast	2015-18 June Variance (YTD-Base/Neg Dist%)	2016-17 Plan New Base/Neg Salary	2016-17 Plan PTE	2016-17 Plan Base/Neg Dist (%)	2016-17 June Variance (YTD-Base/Neg Dist%)
		100%			100%	-100%
	100%	0%	175,000			
	100%	0%	90,000			
	100%	0%	175,000			
	100%	0%	110,000			
	100%	0%	327,000		100%	-100%
	100%	0%	82,400			
	100%	-100%	0		0%	0%
	100%	100%	100,000			
	100%	100%	107,000			
	100%	-100%	103,000			
	100%	0%	62,000		100%	0%
	0%	100%	175,000			-100%
	100%	-100%	0		0%	0%
	100%	100%	305,300			
	100%	0%	110,000		100%	-100%
		100%	114,000			

- **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.



- **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.