

UPlan Weekly Digest

Friday, May 6, 2016

Announcements:

- **Employee Year 2 Planning:** Year 2 detailed data is now available in all forms and reports in the Employee Planning module under "My Task List/Employee Planning". See the "Bug Fixes & Enhancements" section below for more information.
- There are two new pages on the UPlan website that list Known Issues and Enhancements from this Weekly Digest. New issues and enhancements will continue to be announced through the Weekly Digest and old information will move to the web pages after two weeks.
 - Enhancements: <http://brm.ucsf.edu/uplan-enhancements>
 - Known Issues: <http://brm.ucsf.edu/uplan-known-issues>

Tips & Tricks:

- Are columns missing from forms and form reports when you are working in Smart View? You may have your Smart View options set to suppress columns with no data. To unsuppress the columns, go to the Smart View ribbon > Options > Data Options > Suppress Columns. Then uncheck "No Data/ Missing" and "Zero", click on the OK down-arrow to "Save as Default Options", and refresh the form to show the previously suppressed columns. See the below screenshots:

2016-17 and 2017-18 columns missing from your form? You may have your options set to suppress columns with no data.

	2015-16	Forecast	Working	+YearTotal
Staff_Salary	129,722			
Staff_Salary	119,617			
Staff_Salary	122,676			
Staff_Salary	90,254			
Staff_Salary	0			
Staff_Salary	122,471			
Staff_Salary	85,700			
Staff_Salary	110,931			
Staff_Salary	148,800			
Staff_Salary	132,074			

Book1 - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW SMART VIEW PLANNING ACROBAT

Panel Connections Undo Copy Paste Functions Refresh Submit Data Options Help Sheet Info More

Start Edit Data General

POV Compensation Detail by DFP - uplan.ucsf.edu_UPlan_1

D411115 5000 1111111: General Unspecf Refresh

S4

Options

Member Options

Data Options

Advanced

Formatting

Cell Styles

Extensions

Change Smart View options related to grid rows and columns.

Suppress Rows

No Data / Missing

Zero

No Access

Invalid

Underscore Characters

Repeated Members

Suppress Columns

No Data / Missing

Zero (0)

No Access (A)

Replacement

#NoData/Missing Label: []

#NoAccess Label: [#No Access]

#Invalid/Meaningless: [#Invalid]

Submit zero

Display Invalid Data

Enable Essbase Format String

Mode

Cell Display [Data]

Navigate Without Data

Suppress Missing blocks

Go to the Smart View ribbon > Options > Data Options > Suppress Columns. Uncheck "No Data/Missing" and "Zero" and click OK down-arrow to "Save as Default Options".

Help Reset OK Cancel

Save as Default Options

Apply to All Sheets

Book1 - Excel

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Start Edit Data General

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D411115 5000 1111111: General Unspecf Refresh

S4

Click refresh to show the columns that were missing.

	A	B	C	P	AQ	AP	AQ	AR
1				2015-16	2016-17	2017-18		
2				Forecast	Plan	Plan		
3				Working	Working	Working		
4				+YearTotal	+YearTotal	+YearTotal		
5	Staff_Salary				129,722			
6	Staff_Salary				119,617			
7	Staff_Salary				122,676			
8	Staff_Salary				90,254			
9	Staff_Salary				0			
10	Staff_Salary				122,471			
11	Staff_Salary				85,700			
12	Staff_Salary				110,931			
13	Staff_Salary				148,800			
14	Staff_Salary				132,074			
15	Staff_Salary				120,290			
16	Staff_Salary				84,042			
17	Staff_Salary				121,683			
18	Staff_Salary				-932			
19	Staff_Salary				173,004			

Smart View

Task List

Server: uplan.ucsf.edu
Application: UPlan

Employee Planning

- 4.0 Empl Global Assumptions
- 5.0 Empl Seeding Options
- 6.0 Empl FP Feed
- 7.0 Empl Reports
- 7.1 Compensation Detail by DFP

Open Form
Mark Complete

Task Details

Task List

27 Total: 27

0% Complete Overdue

Document Contents

- 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.
- 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 & Enhancements:

- **NEW - Employee Year 2 Planning:** Year 2 Plan Working (i.e. 2017-18) is now available in all data entry forms and reports in Employee Planning. Planners have the ability to view and edit Year 2 data as needed. Prior to this enhancement, salary and benefits distribution data for Year 2 flowed "behind the scenes" to General Planning upon seeding/integrating Year 2 employee data. Note that while seeding Year 2 for employee data is still highly recommended for streamlining workload processes, Control Points and planners have the option to plan directly in Year 2 without seeding. Please contact your Control Point Coordinator if you have questions on seeding for Year 2.
- Reference the [UPlan Enhancements](#) page for a complete list of enhancements relevant to this fiscal year.

Known Issues:

- **Drill Through unavailable through Excel 2010 (Smart View) when Firefox is default browser:** If you are using Smart View to use the Drill Through functionality and your default browser is FireFox you will encounter an error. There are multiple workarounds to this issue:
 - Use UPlan web to use Drill Through > Export to Excel if need to copy/paste to Smart View; or
 - Change your default browser to Internet Explorer by opening IE > Tools > Internet Options > Programs > click Make Default > click Ok > close IE; or
 - Upgrade to Microsoft Office 2013. Ask your local IT unit to install MS 2013 on your PC.
- Reference the [UPlan Known Issues](#) page on our website for a complete list of unresolved issues. As known issues are resolved, they will announced under "Bug Fixes & Enhancements."