UPlan Weekly Digest

Friday, May 20, 2016

Announcements:

- UPlan downtime scheduled for Wednesday, May 25, 2016, 4-6 pm: ITS will be conducting a required upgrade to their backup services for UPlan. Estimated down time will be 2 hours.
- Updated: Drill Through Unavailable through Smart View when FireFox is default browser: Two weeks ago the bug only impacted Excel 2010 users; this week the latest FireFox update impacted Excel 2013. There are two workarounds to use Drill Through from Smart View:
 - o Make IE Default browser so that it works from Smart View, or
 - o Instead of Smart View use UPlan web to Drill Through

See the <u>Planning by Project training manual</u> for Drill Through instructions.

Bug Fixes & Enhancements:

- To Be Hired (TBH) Employee Names: Planners now have the ability to uniquely name their TBH's; this functionality is referred to as "Dynamic TBH" in the UPlan system. All existing TBH's have transitioned to the new names as indicated by you and/or your Control Point. Note that existing TBH's that were not renamed remain the same, albeit with an underscore for example, "To be Hired 1" is now "To be Hired_1". If you would like to change your existing TBH to a different name, you must first delete the TBH and create a new one.
 - 1. The interface, steps, and forms for creating a new Dynamic TBH remain the same:

a. To access the forms, navigate to My Task List > Employee Planning > TBH Empl Forms.

							_					
	anagement System Workspace, Fusion Edition					Logged in as		Help Log (
ale Ele Est Ven Favorites Iook H												
🏊 🍖 Explore 📋 🖉 🚜 🃝 🚽	# (# 🔝 🖨 🚊 🐼 🇞 🗩 #							-				
omePage UPlan - Task List Status ×						Search		0				
Forms	Task List Status						_					
/ Task List	Task - TBH Landing Page Task Instructions											
General Planning	j_g vycrg: stattin f france à advectation											
Employee Planning												
Individual Empl Forms					2015-16	2016-17	2017-18					
Multi-Empl Forms					Forecast Working	Plan Working	Plan Working					
a 🏴 TBH Empl Forms					YearTotal	YearTotal	> YearTot					
Search Individual TBH	Name of State States of St	F_New Index	T7237: ANL 4	New BaseBNeg Salary	79,496							
TBH Landing Page				BaseäNeg Benefits Adj (%)	34%			1				
Empl Global Assumptions	Manual I. & Ann Indiana and American	F.B. Samaler Sam Samerica, Sept. 1.	17238: ANL 5	New Base & Neg Salary		100,000						
Empl Seeding Options				BasesNeg Benefits Adj (%)		29%						
Empl FP Feed		 A second case (acces) takes into 	T0355: ADM CRD OFCR	New BaseBNeg Salary		135,000						
Empl Reports				Base&Neg Benefits Adj (%)		29%						
9 Push Empl Data to General		P.B. Salestin Sales Sectory Larrents Phys. 8	T0355: ADM CRD OFCR	New Base&Neg Salary		135,000						
				BaseSNeg Benefits Adj (%)		29%						
	water and a second	P_REALBORNES	T0280: MGR	New Base&Neg Salary	160,773	165,596						
	•	BaseShing Benefits Adj (%) 38.95%										
		F_NER BURNER	NoTitleCode	New Base&Neg Salary	145,400	149,762						
				BaseSNeg Benefits Adj (%)	38.95%							
		P_Boardsard	T0280; MGR	New Base&Neg Salary	145,029	199,380						
	a design of the second s			Base&Neg Benefits Adj (%)	38.95%							
		New Base8Neg Salary	66,601	68,599								
			Sector Sector	BaseSNeg Benefits Adj (%)	38.95%							
		F_INALINE B	T0280; MGR	New Base&Neg Salary	124,800	128,544						
	Base Weg Benefits Adj (%)	38.95%										
		P_Sourcestor	T0280: MGR	New Base&Neg Salary	130,000	133,900						
		a han see of	202	Base&Neg Benefits Adj (%)	38.95%							
		F_local manufe	T0280: MGR	New Base&Neg Salary	155,400	171,392						
		P. Strangerst	70000 4007 0000 0000	Base&Neg Benefits Adj (%)	38.95%							
		P. Contraction	T0920: ASST DIRECTOR	New BaseBNeg Salary	166,400	171,392						
				Base&Neg Benefits Adj (%)	38.95%							
				omplete Previous Incomp	ete Previous							

b. To add a new TBH, navigate to the TBH Landing Page form > choose your MyOrg DeptID > right-click anywhere on the form > choose "Add TBH". This will bring up a prompt for you to create the new TBH.

			JMyOrg:					
			2015-16	2016-17	2017-18			
			Forecast	Plan	Plan			
			Working	Working	Working			
			> YearTotal	YearTotal	YearTotal			
	Runtime Prompts - Add Dynamic TBH							
	Prompt Text	Value				_		
	😭 * TBH Name							
	🐺 * 1:Select a Title Code	NoTitleCode				¥.,		
	📑 * 1:Select DeptID	"D				ý _{l,}		
	📑 * 1:Select Year.	FY17				¥1.,		
	* 1:Select the Planning Scenario	Plan						
	📑 * 1:Select the Planning Version	Working				¥.,		
	* 1:Enter the Hire Date	7/1/16				20		
	* 1:Enter the Total FTE	1						
	120 * 1:Enter the Total Headcount	1						
	* 1:Select the Grade/Step	NoGradeStep				•		
	* 1:Enter Base&Neg Salary	75000						
	1:Enter Base&Neg Benefits Adj (%)	25						

- 2. The Dynamic TBH functionality has some known gaps that we are currently working with Oracle to address in future patches. Below are the gaps as well as recommended best practices:
 - o Add/Delete TBH's outside of planner's DeptID access

We are working with Oracle to address a known issue that allows planners to add and delete TBH's for outside of their access. Please be diligent in reviewing the TBH's that you add or delete to ensure you are working with the correct DeptID(s). If you delete a TBH in error that does not belong to your DeptID, please contact the UPlan team for assistance.

- <u>All TBH names must be unique</u>
 Planners will receive an error if a particular name is already taken. Please follow the guideline indicated by your Control Point. For example, your Control Point may have you preface your TBH name with certain text such as "F_..." for FAS or "D_..." for SOD.
- <u>Correct Year and Scenario combination</u>
 When creating TBH's, the correct Year and Scenario combination must be entered in the Add Dynamic TBH prompt (e.g. FY16/Forecast, FY17/Plan, FY18/Plan). If the prompt is launched with the wrong Year and Scenario combination, planners will receive an error message but the TBH member name is created in the backend. Planners will not be able to recreate the TBH with the same name until the member name is deleted by the UPlan team. If this occurs, please contact the UPlan team to delete the TBH.
- <u>Use of some special characters could create some issues in Smart View Essbase for ad hoc reporting</u> Please avoid having spaces before/after a dash (-), using back slashes (/), or using forward slashes (\).
 Smart View Essbase

The new TBH name will not be reflected in Essbase ("UPlan-Empl" or "EmplRpt") for ad hoc reporting until the next day.

• Reference the <u>UPIan Enhancements</u> page for a complete list of enhancements relevant to this fiscal year.

Known Issues:

• Reference the <u>UPIan Known Issues</u> page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under "Bug Fixes & Enhancements".