

UPlan Weekly Digest

Friday, June 24, 2016

Announcements:

- **UPlan Customer Feedback Survey:** Please keep an eye out for an email on the customer feedback survey that will be sent out soon. We look forward to and appreciate your feedback!

Tips & Tricks:

- **Avoid entering zeroes since they're considered data:** If you need to delete data, leave the cell blank instead of entering zero. The system recognize zeroes as data and as a result, the values will appear in reports. The DFP will also appear in the Completion Tracking report, even if it is not a DFP you plan under. See examples of reports below:
 - Plan Net Position report with zeroes entered:

Dept ID	Description	Total Revenue	Total Expense	Income/(Loss) from Operations	Total Other Changes	Change in Net Position	Total Net Position - Beginning of Period	Total Net Position - End of Period
4200:	Local Gv Contract, Grant, Coop	732,632	732,632	-0		-0	-13	-13
7000:	Private Restricted Gifts						-1	-1
							-83	-83
		6,000	1,198	4,802	4,802	29,191	30,637	30,328
			20,993	-20,993	25,000	4,007	-1,822	2,185
			0	0		0	-463	-463
							1,761	1,761
		0	37,524	-37,524		-37,524	54,854	17,329
		360	5	355		355	899	1,254
	NoProject	0		0		0	0	0
7700:	Endowment income, Foundation	5,000	20,232	-15,232		-15,232	37,193	21,961
		29,201	441	28,760		28,760	46,985	75,744
7710:	Endowment income, Regents			-0		0	0	0
				0		0	0	0
			1,980	-1,980		-1,980	1,980	0
1900:	State educational appropr	20,143	404	19,739		19,739	19,874	39,613
	1111111: General Unspecific	1,025,113	1,025,113	-0		-0	-0	-0

- Revenue & Expense form with zero entered:

	2014-15 Actual	2015-16 Actual	2015-16 Plan	2015-16 Forecast	2016-17 Plan	2017-18 Plan
Completion Tracking						
4601C: Other revenues_C				0		
Total Revenue				0		
Income/(Loss) from Operations				0		
Change in Net Position				0		
Total Net Position - Beginning of Period					0	0
Total Net Position - End of Period					0	0

- How the zero in the R&E affects the Completion Tracking report; an extra line appears:

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The main window displays the 'Task List Status' page for 'Task - Completion Tracking'. The left sidebar shows a 'My Task List' with various reports, including 'Completion Tracking'. The main area shows a table with columns for '2015-16 Forecast', '2016-17 Plan', and '2017-18 Plan'. A red box highlights a row for '3000: Tuition' with a zero value in the '2015-16 Forecast' column.

	2015-16 Forecast	2016-17 Plan	2017-18 Plan
YearTotal Completion Tracking			
4200: Local Gv Contract, Grant, Coop			
7000: Private Restricted Gifts			
7700: Endowment income, Foundation			
7710: Endowment income, Regents			
1900: State educational appropr			
3000: Tuition	0		
1111111: General Unspecifc			

- R&E form without zero entered:

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The main window displays the 'Task List Status' page for 'Task - Revenue and Expense - Level C'. The left sidebar shows a 'My Task List' with various reports, including 'Revenue and Expense - Level C'. The main area shows a table with columns for '2014-15 Actual', '2015-16 Actual', '2015-16 Plan', '2015-16 Forecast', '2016-17 Plan', and '2017-18 Plan'. A red box highlights a row for '4601C: Other revenues_C' with a zero value in the '2015-16 Forecast' column.

	2014-15 Actual	2015-16 Actual	2015-16 Plan	2015-16 Forecast	2016-17 Plan	2017-18 Plan
Final						
YearTotal						
Completion Tracking						
4601C: Other revenues_C				0		
Total Revenue						
Income/(Loss) from Operations						
Change in Net Position						
Total Net Position - Beginning of Period						
Total Net Position - End of Period						

- o Completion Tracking report doesn't list the "3000: Tuition" Fund account because there is no data in it:

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition. The main window displays the 'Task List Status' for 'Completion Tracking'. The left sidebar shows a 'My Task List' with categories like General Planning, Reports, and Employee Planning. The main area displays a table with columns for '2015-16 Forecast', '2016-17 Plan', and '2017-18 Plan'. The table lists various fund accounts such as '4200: Local Gv Contract, Grant, Coop' and '7000: Private Restricted Gifts'. A red box highlights the 'Dept ID XXXXXX' in the first column.

		2015-16 Forecast	2016-17 Plan	2017-18 Plan
		YearTotal	YearTotal	YearTotal
		Completion Tracking	Completion Tracking	Completion Tracking
Dept ID XXXXXX	4200: Local Gv Contract, Grant, Coop			
	7000: Private Restricted Gifts			
	NoProject			
	7700: Endowment income, Foundation			
	7710: Endowment income, Regents			
	1900: State educational appropr			
	Prof degree tuition			
	1111111: General Unspecfc			
	1111111: General Unspecfc			

- **Did you know you can navigate to Employee Planning to adjust an individual employee from the Revenue and Expense form in General Planning?** See the below for steps and screenshots.
 1. From the Revenue and Expense form, choose a specific planning level DFP, then right-click anywhere on the Account column and select "Compensation Detail by DFP".
 2. From the "Compensation Detail by DFP" report, click on the title code of the employee or TBH that you want to edit and choose "Go to Empl Forms" or "Go to TBH Forms".
 3. This will bring you to the individual Employee or TBH Composite forms to make edits.

Forms

My Task List

- General Planning
 - Revenue and Expense - Level C
 - Revenue and Expense - Level E
 - Tuition and Fee Revenue Calculator
 - Seeding and Global Assumptions
 - Reports
 - ResetCompletionTracking
 - FP Revenue and Expense
- Employee Planning

Task List Status

Task - Revenue and Expense - Level C | Task Instructions

Dept ID XXXXXX | 1900: State educational appropr | 11111111: General Unspecifc

	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 Tracking			100%	100%	100%	100%
4000C: General state appropriations_C	1,020,207	1,058,202		1,058,202	-118,100	7,200
Tfr state appropriation_C			1,025,113	96,788	1,162,533	1,180,022
Total Revenue	1,020,207	1,058,202	1,025,113	1,154,990	1,044,433	1,187,222
5000C: Faculty salaries_C		11,644	508,865	665,870	517,239	595,102
5030C: Faculty benefits_C		3,342	137,789	208,611	111,216	136,400
5050C: Staff salaries and overtime		1,428	155,167	185,869	280,436	288,849
5060C: Staff benefits_C		79,748	79,779	87,561	129,203	133,079
5515C: Supplies and materials_C			126,311			19,192
5550C: Services_C		2,977	17,203	13,001	13,912	14,600
5580C: Other expenses_C			0	0	0	0
Total Expense		99,138	1,025,113	1,160,913	1,052,007	1,187,222
Income/(Loss) from Operations		0,937	-0	-5,923	-7,574	-0
Change in Net Position		0,937	-0	-5,923	-7,574	-0
Total Net Position - Beginning of Per		-0	-0	-0	-5,923	-13,496
Total Net Position - End of Period		10,937	-0	-5,923	-13,496	-13,497

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Task List Status

Task - Revenue and Expense - Level C | Task Instructions

Revenue & Expense Level_C Accounts > Compensation Detail by DFP

Dept ID XXXXXX | 1900 | 11111111: General Unspecifc

	2015-16	2016-17	2017-18
	Forecast	Plan	Plan
	Working	Working	Working
	YearTotal	YearTotal	YearTotal
Faculty_Academic_Salary		60,150	61,800
T1734: HS CLIN PROF-HCOMP		15,221	15,678
T2030: HS ASSOC CLIN PROF-FY		9,627	9,916
T1732: HS ASST CLIN PROF-H		0	0
T2050: HS ASST CLIN PROF-F		0	0
T1702: RECALL FACULTY		0	0
T1732: HS ASST CLIN PROF-H		55,620	57,289
T1734: HS CLIN PROF-HCOMP			
T1721: PROF-HCOMP		37,173	38,288
T1702: RECALL FACULTY		45,900	47,277
T1731: HS CLIN INSTR-HCOMI			
T1732: HS ASST CLIN PROF-H			
T2050: HS ASST CLIN PROF-F			
T1732: HS ASST CLIN PROF-H		54,999	56,649
T1732: HS ASST CLIN PROF-H		55,001	56,651
T1732: HS ASST CLIN PROF-H		54,999	56,649
T1721: PROF-HCOMP	187,513	87,753	90,386
T1732: HS ASST CLIN PROF-HCOM	10,479		
T2070: HS CLIN INSTR-FY		4,032	4,153
T1702: RECALL FACULTY		20,098	34,064
T1732: HS ASST CLIN PROF-HCOM		2,700	2,781
T1732: HS ASST CLIN PROF-HCOM			62,500
T1731: HS CLIN INSTR-HCOMP	4,950	45,900	47,277
T1732: HS ASST CLIN PROF-HCOM	318,133	223,319	292,519
T1734: HS CLIN PROF-HCOMP	62,169	60,150	61,800
T2030: HS ASSOC CLIN PROF-FY		15,221	15,678
T2050: HS ASST CLIN PROF-FY		9,627	9,916
T2070: HS CLIN INSTR-FY		4,032	4,153
T1702: RECALL FACULTY		41,016	71,237
T1721: PROF-HCOMP	225,605	87,753	90,386
Total All TitleCode	708,315	517,239	595,102
Faculty_Academic_Benefits		7	
T1733: HS ASSOC CLIN PROF-HC		16,901	10,827
T1734: HS CLIN PROF-HCOMP			11,124
T2030: HS ASSOC CLIN PROF-FY		457	470
T2050: HS ASST CLIN PROF-FY	161	788	797

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

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Explore

HomePage UPlan - Task List Status

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Task List Status

Task - Revenue and Expense - Level C Task Instructions

Revenue & Expense Level_C Accounts > Compensation Detail by DFP > Employee Composite

Employee ID and Name

Empl Salary Empl Benefit Empl Distr Pct Empl Distr Sal \$ Empl Distr Ben \$ Empl Summary

		2015-16	2016-17	2017-18	
		Forecast	Plan	Plan	
		Working	Working	Working	
		> YearTotal	> YearTotal	> YearTotal	
Dept ID XXXXXX	T2050: HS ASST CLIN PROF-FY	Initial Base&Neg Salary	71,258	73,877	76,094
		Global Assumptions %	3%	3%	3%
		Override Global %			
		Global Assumptions Impact \$	177	180	185
		Salary Level Override	65,358		
		New Base&Neg Salary	71,350	74,057	76,279
		Ending Total Salary	71,350	74,057	76,279

Bug Fixes & Enhancements:

- Reference the [UPlan Enhancements](#) page for a complete list of enhancements relevant to this fiscal year.

Known Issues:

- Reference the [UPlan Known Issues](#) page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under “Bug Fixes & Enhancements”.