

UPlan Weekly Digest

Friday, July 1, 2016

Announcements:

- **June Prelim Actuals:** June Prelim actuals will be loaded to 2015-16 Actual Final on Monday, July 18. For selected units that reached out requesting this load be done, June Prelim actual data will be loaded to 2015-16 Forecast Working. However, the June Forecast Working will not be closed. If you would like June Prelim loaded, please contact your UPlan control point coordinator.
- **UPlan Customer Feedback Survey:** The survey was sent out on Tuesday, June 28, and takes about 10-15 minutes to complete. 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 recognizes 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:

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition interface. The main window displays a 'Task List Status' report for 'Plan Net Position'. The report is filtered for the fiscal year 2015-16 and the 'Plan' status. The table shows various departments and their financial data, including Total Revenue, Total Expense, Income/(Loss) from Operations, Total Other Changes, Change in Net Position, Total Net Position - Beginning of Period, and Total Net Position - End of Period. A red box highlights a row for Dept ID XXXXXX, which has zero values for Total Revenue, Total Expense, Income/(Loss) from Operations, Total Other Changes, Change in Net Position, and Total Net Position - End of Period. Another red box highlights a row for Dept ID XXXXXX, which has zero values for Total Revenue, Total Expense, Income/(Loss) from Operations, Total Other Changes, Change in Net Position, and Total Net Position - End of Period.

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
							-03	-03
			309	-309		-309	30,637	30,328
		6,000	1,198	4,802		4,802	29,191	33,993
			20,993	-20,993	25,000	4,007	-1,822	2,185
			0	0		0	-463	-463
		0	37,524	-37,524		-37,524	1,761	1,761
		360	5	355		355	54,854	17,329
7700	Endowment income, Foundation	0		0		0	899	1,254
		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
			1,980	-1,980		-1,980	1,980	0
		20,143	404	19,739		19,739	19,874	39,613
1900	State educational appropr	1,025,113	1,025,113	-0		-0	-0	-0

- Revenue & Expense form with zero entered:

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

	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						
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	0

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

Forms

My Task List

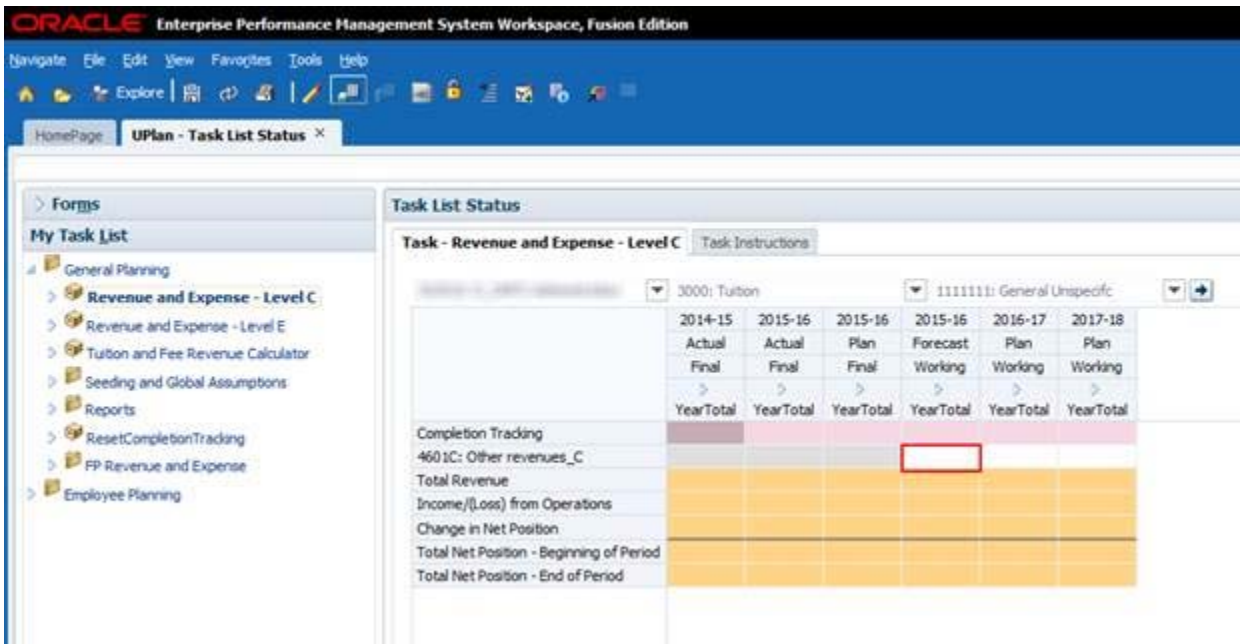
- General Planning
 - Revenue and Expense - Level C
 - Revenue and Expense - Level E
 - Tuition and Fee Revenue Calculator
 - Seeding and Global Assumptions
 - Reports
 - Completion Tracking
 - Plan Net Position
 - Tuition Revenue by Selected DFP
 - Tuition Revenue by Selected Year and Sce
 - Net Position - Actual and Forecast by Dept
 - Net Position - Actual and Forecast by DFP
 - Net Position - Actual and Forecast by Fund
 - ResetCompletionTracking
 - FP Revenue and Expense
- Employee Planning

Task List Status

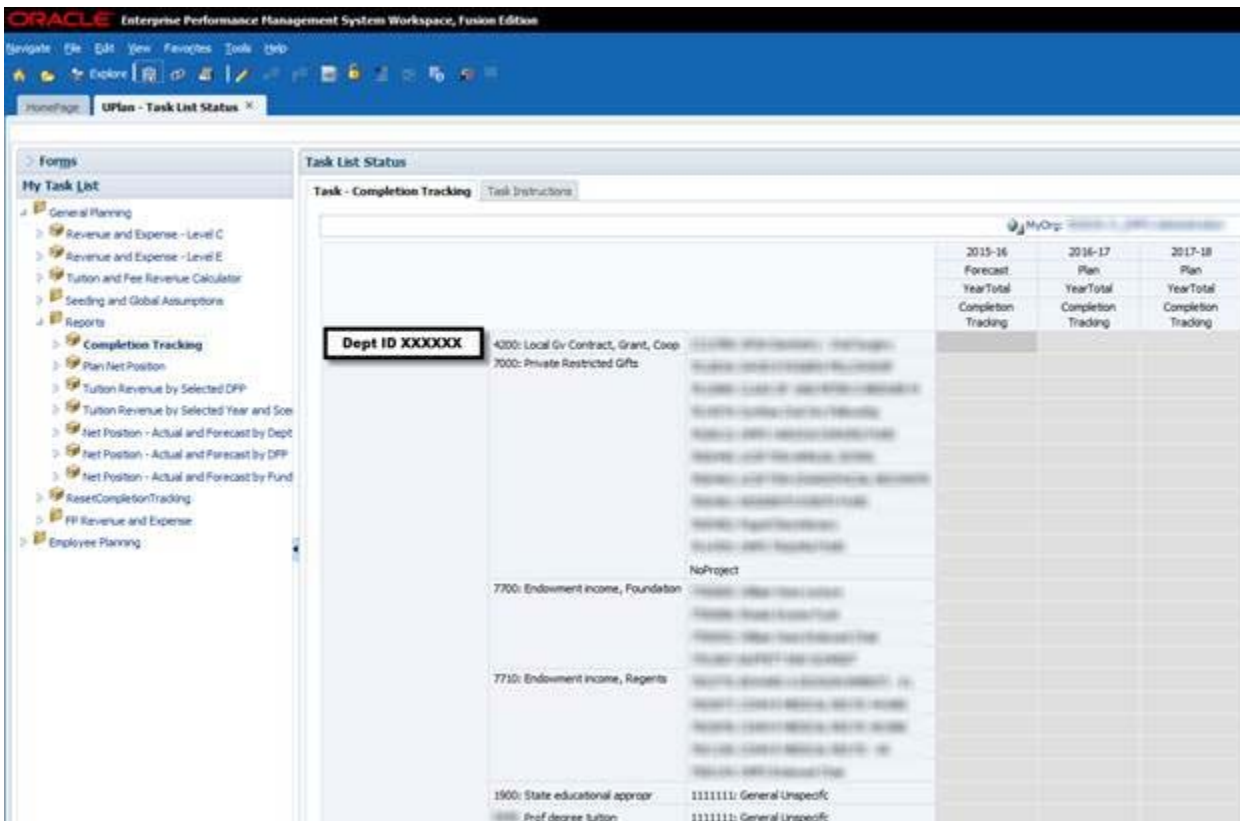
Task - Completion Tracking Task Instructions

		2015-16	2016-17	2017-18
		Forecast	Plan	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			
	3000: Tuition			

- R&E form without zero entered:



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



- **Navigate to Employee Planning to adjust an individual employee from the Revenue and Expense form in General Planning:** See 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".

- 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".
- This will bring you to the individual Employee or TBH Composite forms to make edits.

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

UPlan - Task List Status

Task List Status

Task - Revenue and Expense - Level C

Dept ID XXXXXX

	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%
4000: General state appropriations_C	1,020,207	1,058,202		1,058,202	-118,100	7,200
TB state appropriation_C			1,025,113	96,788	1,162,333	1,180,022
Total Revenue	1,020,207	1,058,202	1,025,113	1,154,990	1,044,433	1,187,222
5000: Faculty salaries_C	41,844	41,844	308,865	463,870	517,238	595,322
5030: Faculty benefits_C	3,342	3,342	137,789	208,611	111,216	136,400
5050: Staff salaries and overtime	71,428	71,428	155,167	185,869	280,436	288,049
5060: Staff benefits_C	9,748	9,748	79,779	87,561	128,203	133,079
5515C: Supplies and materials_C			126,311			19,192
5530C: Services_C	2,977		17,203	13,001	13,912	14,600
5580C: Other expenses_C						0
Total Expense	59,138	59,138	1,025,113	1,165,913	1,052,007	1,187,222
Income/(Loss) from Operations	0,937	0,937	-	-5,923	-7,574	-
Change in Net Position	0,937	0,937	-	-5,923	-7,574	-
Total Net Position - Beginning of Per	-	-	-	-	-5,923	-13,496
Total Net Position - End of Period	0,937	0,937	-	-5,923	-13,496	-13,497

Context menu options: Add Account, Remove Account, Compensation Detail by DFP, Account Detail by DFP, Edit, Adjust, Comments, Supporting Detail, Change History, Attachments, Lock/Unlock Cells, Filter, Sort, Select All.

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

UPlan - Task List Status

Task List Status

Task - Revenue and Expense - Level C

Revenue & Expense Level_C Accounts > Compensation Detail by DFP

Dept ID XXXXXX

	2015-16	2016-17	2017-18
	Forecast	Plan	Plan
	Working	Working	Working
	> YearTotal	> YearTotal	> YearTotal
Faculty_Academic_Salary			
T1794: HS CLIN PROF-HOOMP	68,238	65,800	
T2039: HS ASSOC CLIN PROF-PY	15,221	15,478	
T2059: HS ASST CLIN PROF-P	9,627	9,916	
T1732: HS ASST CLIN PROF-H	0	0	
T2050: HS ASST CLIN PROF-P			
T1702: RECALL FACULTY			
T1732: HS ASST CLIN PROF-H			
T1732: HS ASST CLIN PROF-H	35,420	37,289	
T1732: HS ASST CLIN PROF-H			
T1721: PROF-HOOMP			
T1702: RECALL FACULTY	37,173	38,288	
T1732: HS CLIN INSTR-HOOMP	45,900	47,277	
T1732: HS ASST CLIN PROF-H			
T2050: HS ASST CLIN PROF-P			
T1732: HS ASST CLIN PROF-H	54,999	56,649	
T1732: HS ASST CLIN PROF-H	15,001	16,651	
T1732: HS ASST CLIN PROF-H	54,999	56,649	
T1732: HS ASST CLIN PROF-H			
T1721: PROF-HOOMP	187,513	187,753	90,386
T1732: HS ASST CLIN PROF-HOOP	15,479		
T2070: HS CLIN INSTR-FY	4,032	4,153	
T1702: RECALL FACULTY	20,098	34,064	35,086
T1732: HS ASST CLIN PROF-HOOP	2,700	2,761	
T1732: HS ASST CLIN PROF-HOOP			
T1732: HS ASST CLIN PROF-HOOP	4,950	45,900	47,277
T1732: HS ASST CLIN PROF-HOOP	318,133	223,319	292,519
T1732: HS ASST CLIN PROF-HOOP	42,169	40,330	41,800
T2039: HS ASSOC CLIN PROF-PY	15,221	15,478	
T2050: HS ASST CLIN PROF-PY	9,642	9,916	
T2070: HS CLIN INSTR-FY	4,032	4,153	
T1702: RECALL FACULTY	41,016	71,237	73,374
T1721: PROF-HOOMP	225,405	187,753	90,386
Total All TitleCode	786,031	617,228	496,032
Faculty_Academic_Benefits			
T1733: HS ASSOC CLIN PROF-HO	7		
T1734: HS CLIN PROF-HOOMP	16,905	16,827	11,124
T2039: HS ASSOC CLIN PROF-PY	457		470
T2060: HS ASST CLIN PROF-PY	162	164	167

Context menu options: Go to Empl Forms, Go to TBH Forms, Edit, Adjust, Comments, Supporting Detail, Change History, Attachments, Lock/Unlock Cells, Filter, Sort, Select All, Apply.

Task List Status
 Task - Revenue and Expense - Level C | Task Instructions

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

Employee ID and Name

Empl Salary | Empl Benefit | Empl Dist Pct | Empl Dist Sal \$ | Empl Dist Ben \$ | Empl Summary

			2015-16	2016-17	2017-18
			Forecast	Plan	Plan
			Working	Working	Working
		> YearTotal	> YearTotal	> YearTotal	
Dept ID XXXXXX	T2090: HS ASST CLIN PROF-FY	Initial Base/Mtg 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/Mtg 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”.