Settings for UPlan PC Users

UPlan operates best with certain browser and screen resolution settings. This job aid will walk you through how to set these.

|	
I.	[UPlan IE 11 Settings](#) **(page 1)**
II.	[UPlan Firefox Settings](#) **(page 4)**
III.	[Firefox Troubleshooting](#) **(page 6)**
IV.	[Non-Browser Settings](#) **(page 6)**

I.   UPlan IE 11 Settings

Oracle has recommended settings for Internet Explorer 11 when using Hyperion products.

To set up IE for UPlan on your PC, follow the following 8 steps:

1. Check for new version every time user visits a page (page 1)
2. Disable Default Pop Up Blocking (page 1)
3. Add Workspace URL to Trusted Sites (page 2)
4. Customize Security Settings (page 2)
5. Enable option "Always allow session cookies" (page 3)

1. Check for a new version every time a user visits a page

▸   Open Internet Explorer

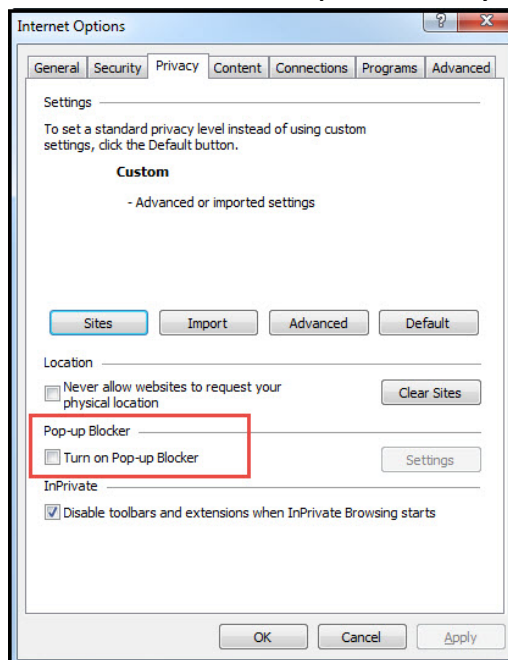▸   Go to Tools > Internet Options > General tab
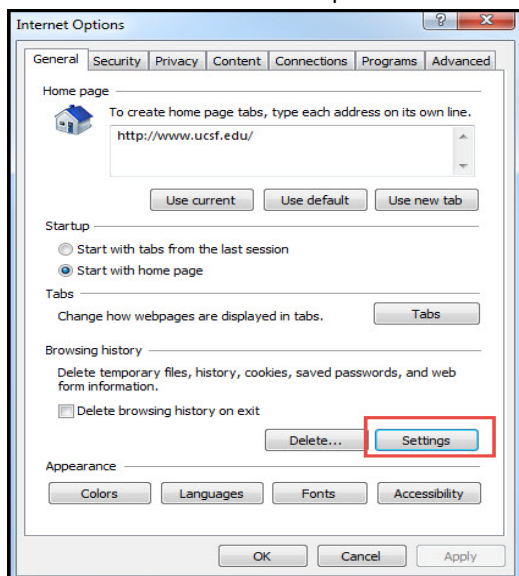
▸   In "Browsing history" section click on "Settings" button and then select "Every time I visit the webpage" option:
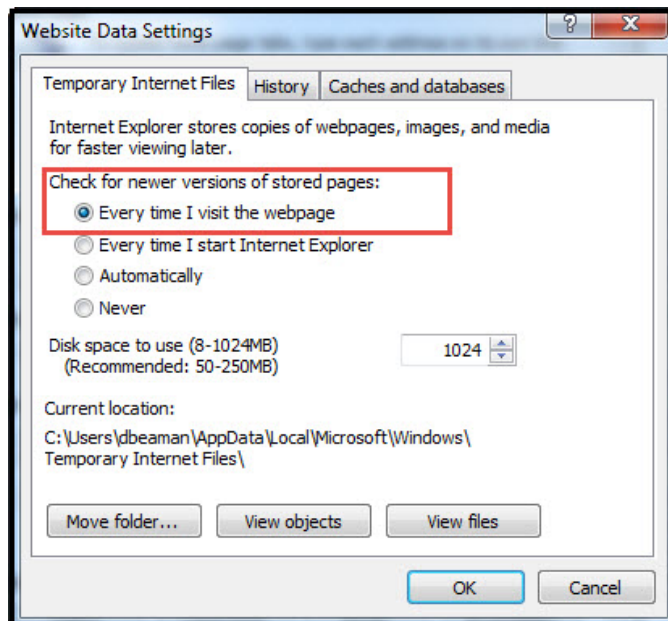
▸   Click OK.

2.   Disable Default Pop Up Blocking

▸   **Go to Tools > Internet options > Privacy tab**
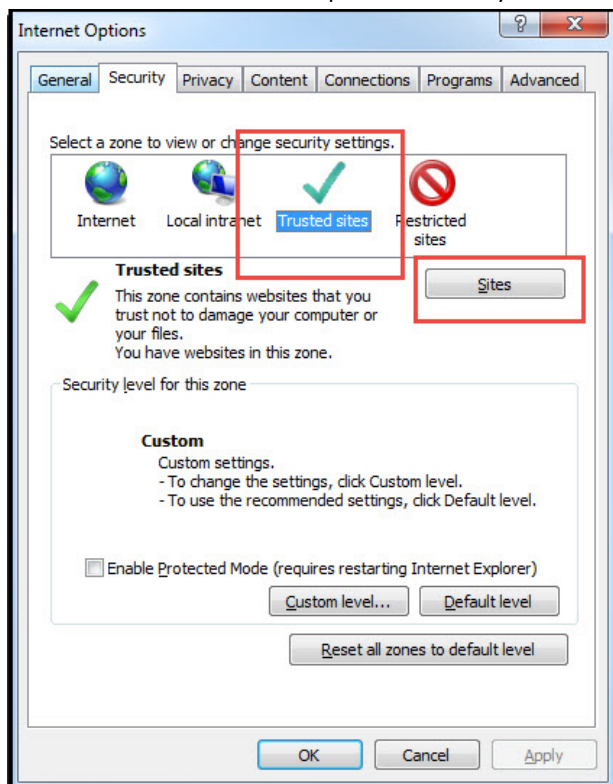

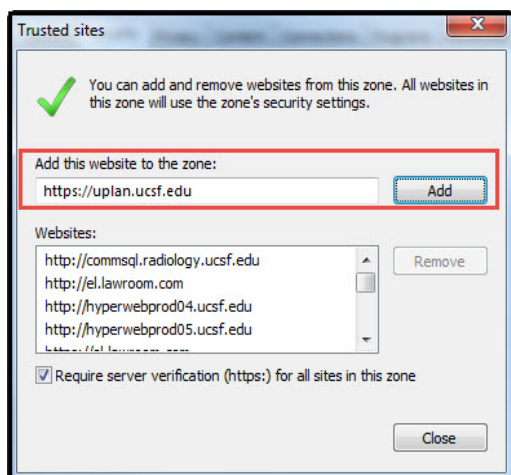▸   Uncheck "Turn on Pop-up Blocker" and click OK

3.   Add Workspace URL to Trusted Sites

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▸ Go to Tools > Internet options > Security tab

▸ Select "Trusted sites" from "Select a zone to view or change security settings" window, then click on "Sites" button.
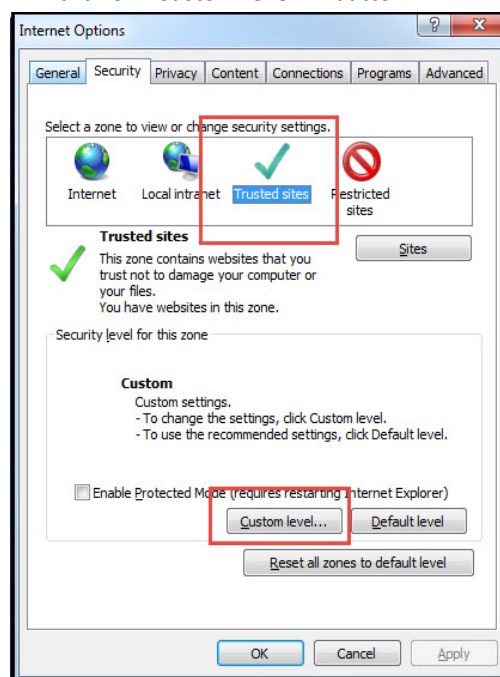

▸ Type your workspace URL in form https://uplan.ucsf.edu and click Add
▸ Check "Require server verification (https:) for all sites in this zone"

▸ Click Close

4. Customize Security Settings

▸ Open Internet Explorer
▸ Go to Tools > Internet options > Security Tab
▸ Select zone containing your Oracle Hyperion servers and click on "Custom level..." button

▸ In "Miscellaneous" section enable options "Access data sources across domains" and "Allow script-initiated windows without size or position constraints"

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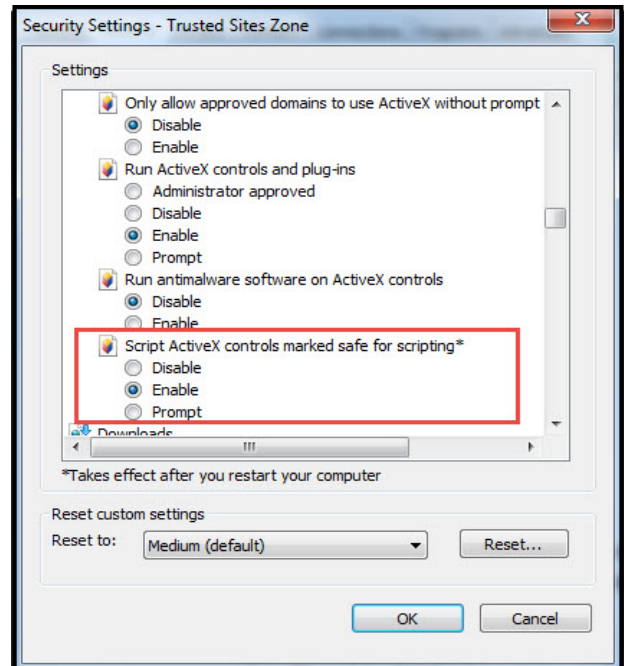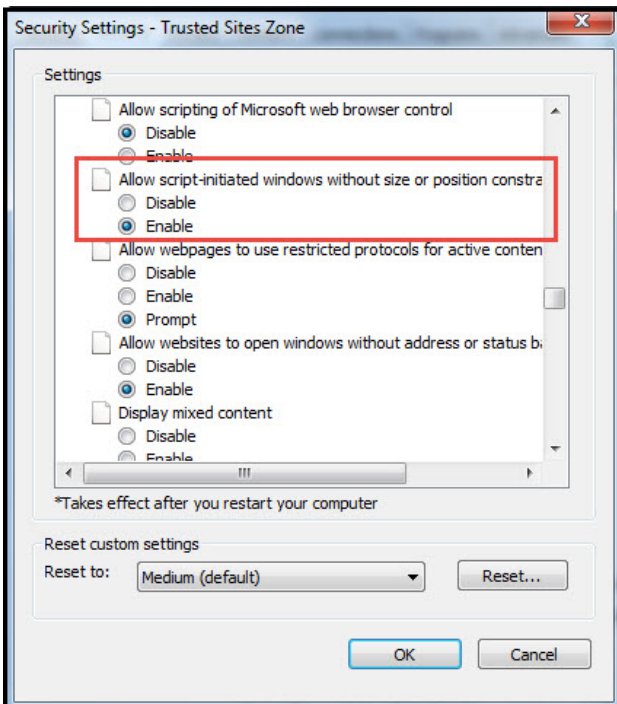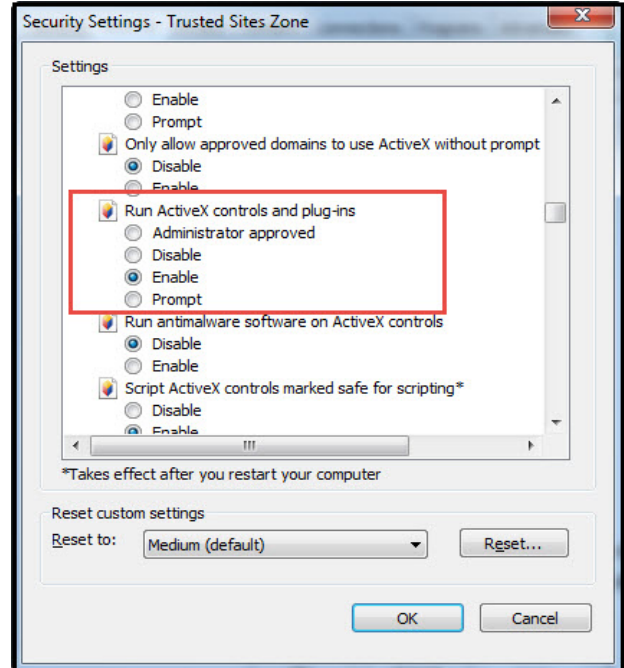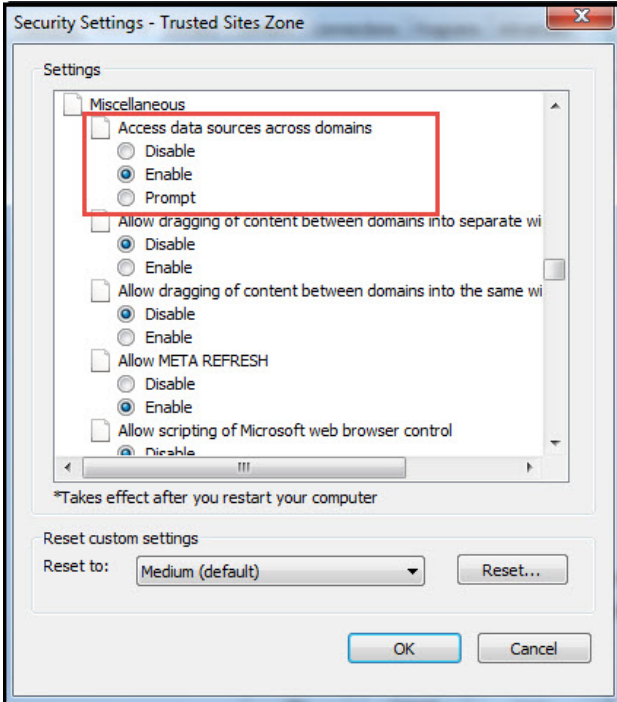
▸ Click Ok

▸ In "ActiveX controls and plug-ins" section enable "Run ActiveX controls and plug-ins" and "Script ActiveX controls marked safe for scripting"
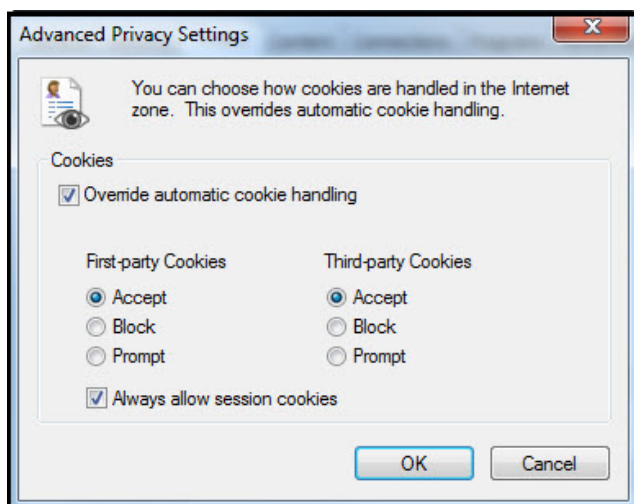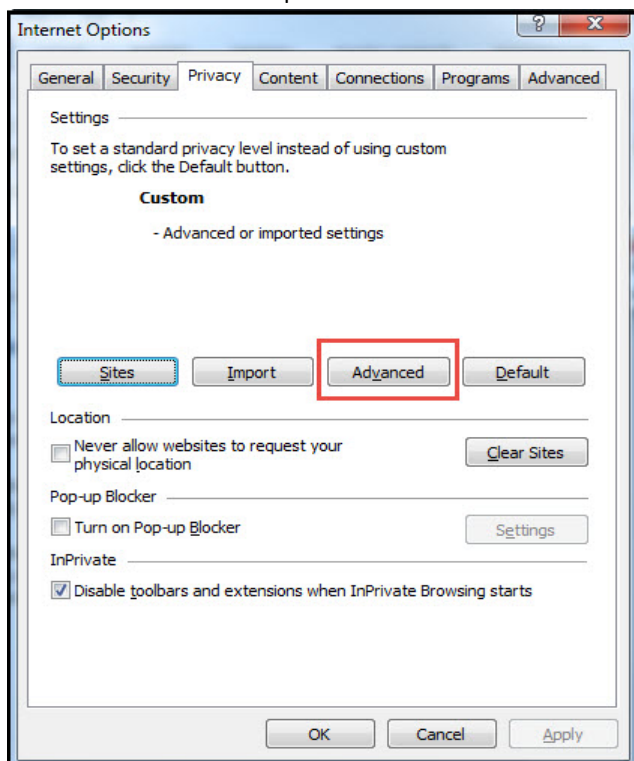
5. Enable option "Always allow session cookies"

▸ Go to Tools > Internet options > Privacy Tab > Advanced. Check the "Override automatic cookie handling", accept

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the first and third party cookies and check the "Always allow session cookies" option.

> ▸ The first time the following will show up on the browser:

> ▸ Click on Options and select "Allow Pop up for https://uplan.ucsf.edu/workspace/index.jsp"
> ▸ Refresh / Reload the current Page or Close / Reopen the browser and you should be able to login to UPlan.

III. If UPlan link from MyAccess does not load from Firefox

1. Clear your cache/delete browser history

Clearing the browser cache is healthy and should be done every once in a while. To do this in Firefox:

> ▸ Click on Firefox > History > Clear Recent History > Set the Time Range to Clear to Everything > Click all the boxes below:

> ▸ Click Clear Now > Close all Firefox windows > Reopen Firefox > Sign in to UPlan.

2. Possible reasons you cannot access UPlan:

> ▸ You may not have **admin access** to your machine which is rejecting any modifications to the browsers, including downloading anything new. Contact your local desktop support person or contact the IT Service Desk.

> ▸ Click Ok > Apply > Ok

II. UPlan Firefox Settings

UPlan can be accessed in **the latest version of Firefox or Firefox ESR.** Sign in to MyAccess > Click on UPlan.

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▸ You may not be provisioned for UPlan Access. Contact your Control Point Coordinator. They need to contact your Department Access Administrator to submit a request through MyAccess > Access Management.
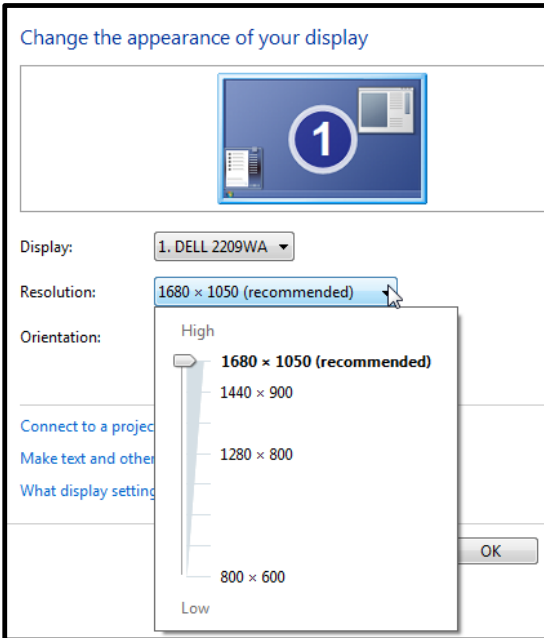
IV.   Non-Browser Related Settings
Verify your pre-loaded settings are set properly.
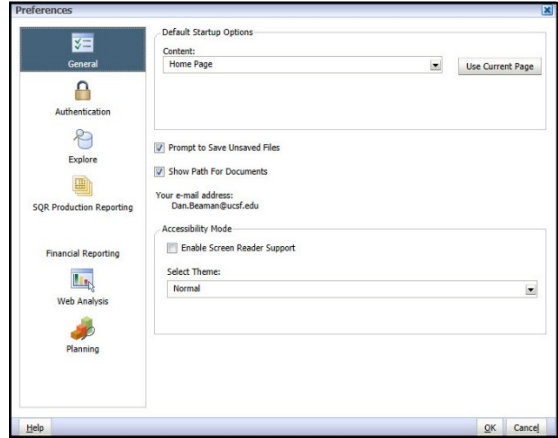
2.   Set Recommended Screen Size
It is recommended that UPlan be viewed in the highest screen resolution possible.

▸ Right click on the Desktop > Click on Screen Resolution.

▸ Choose "Adjust Resolution" from the menu on the left and then set to the highest setting.

1. UPlan File > Preferences > General Tab

▸ Content dropdown screen should say **Home Page**.

2. Financial Reporting Tab

▸ User Point of View Preview button should be **On**.