UMPlan Getting Started & Navigation

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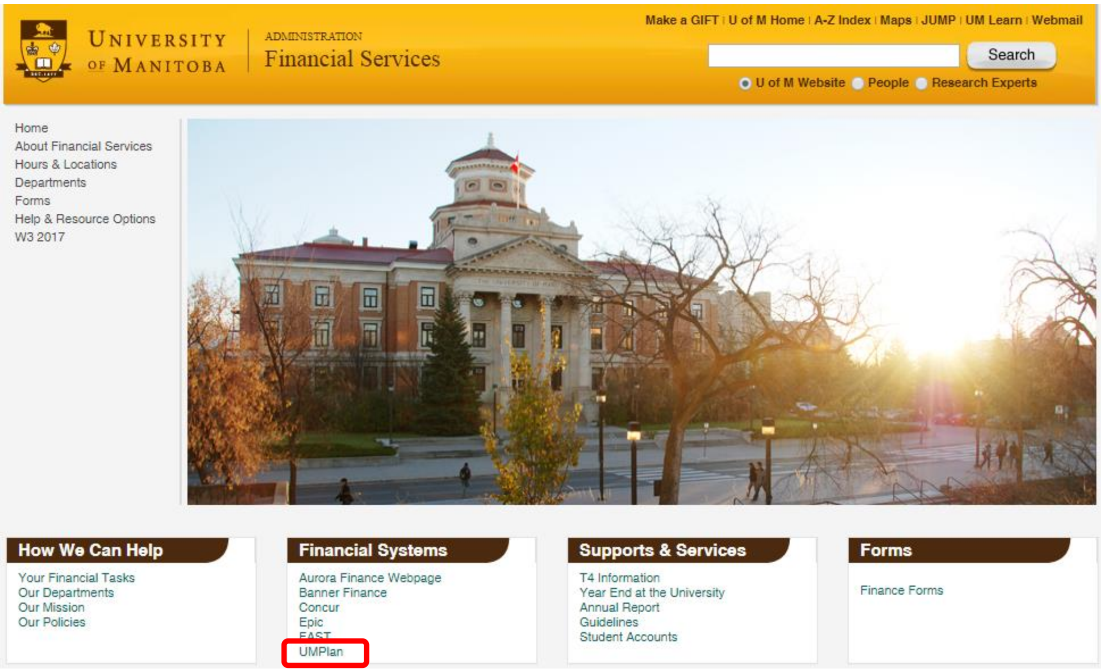
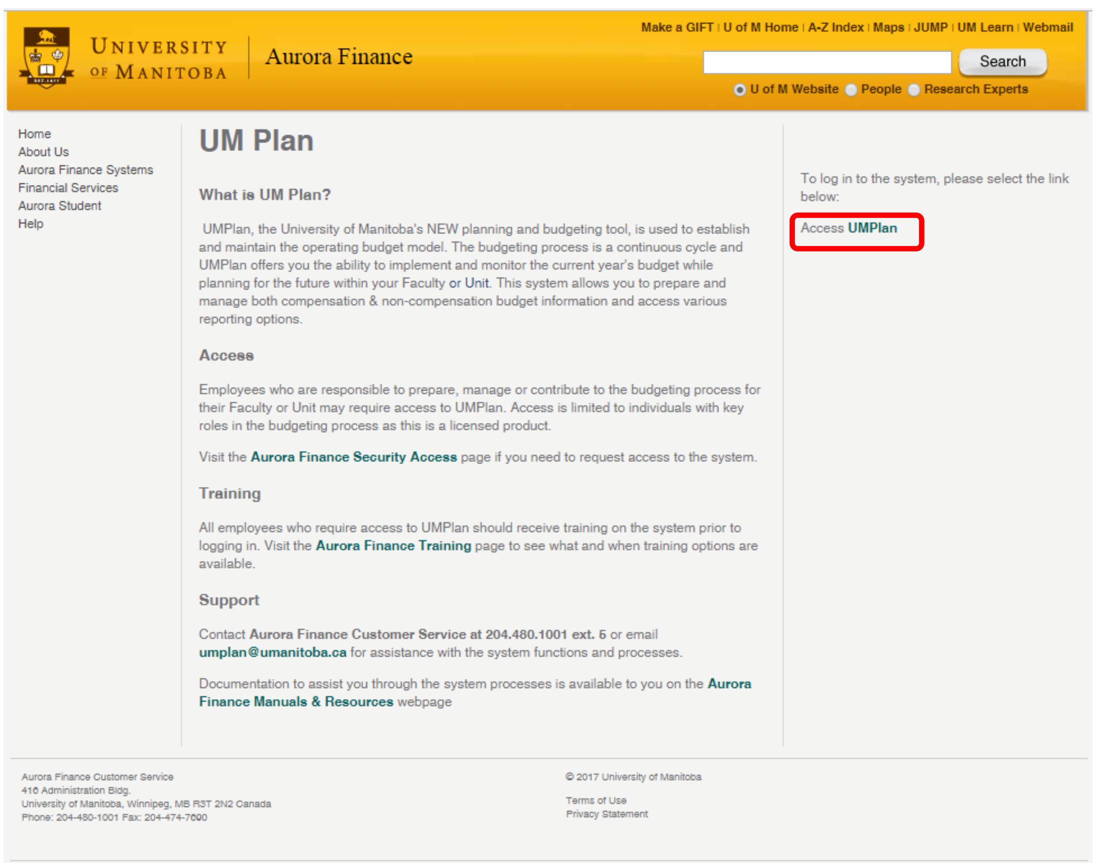
Logging in to UMPlan

UMPlan is accessed through the Financial Services webpage: http://umanitoba.ca/admin/financial_services/

Click on **UMPlan** in the Financial Systems hub.

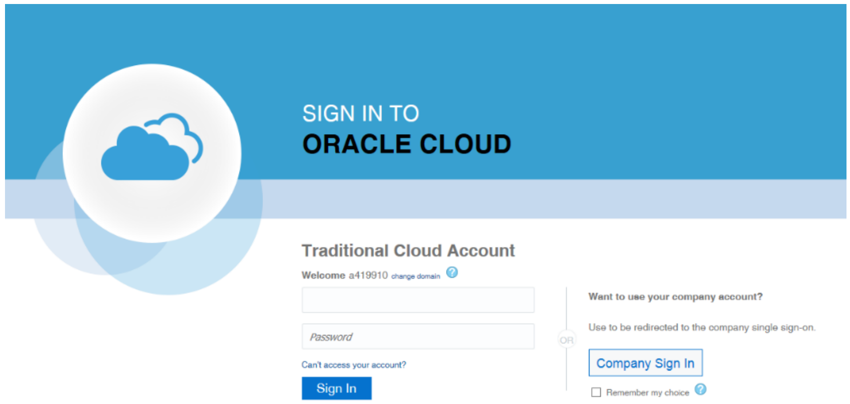


Click on the Access **UMPlan** link in the right side column.



You will be brought to the sign in page for UMPlan.

You have two options for signing into the system:



- Traditional Cloud Account sign in requires you to enter the given user id and password, which is sent to you when initially being given access. This will be different from your UMnetID and password.
- Company Sign In will allow you to use your University of Manitoba email address and password.

Homepage

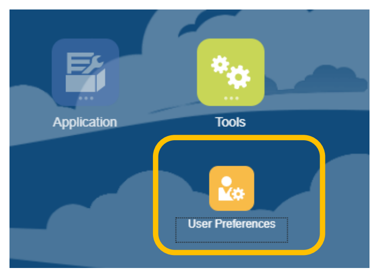
Here is a snapshot of the UMPlan Homepage.

1. **Navigator Menu**:
    - All tiles, clusters and forms are accessible through the menu in a list format.
2. **Home**:
    - Return to the Homepage at any point in time.
3. **Accessibility**:
    - Accessibility settings.
4. **Profile**:
    - Support documentation from the software provider and sign out.
5. **Activity, Recent, Favorites**:
    - Announcements will be posted here from Financial Services and the Financial Planning Office. *Recent* will keep track of the forms accessed during your session and allow you to add them to Favorites.
6. **Tiles**:
    - Contains a cluster of related activities.
7. **Cluster**:
    - Contains forms for planning activities.
8. **Forms**:
    - Contains input and review forms.

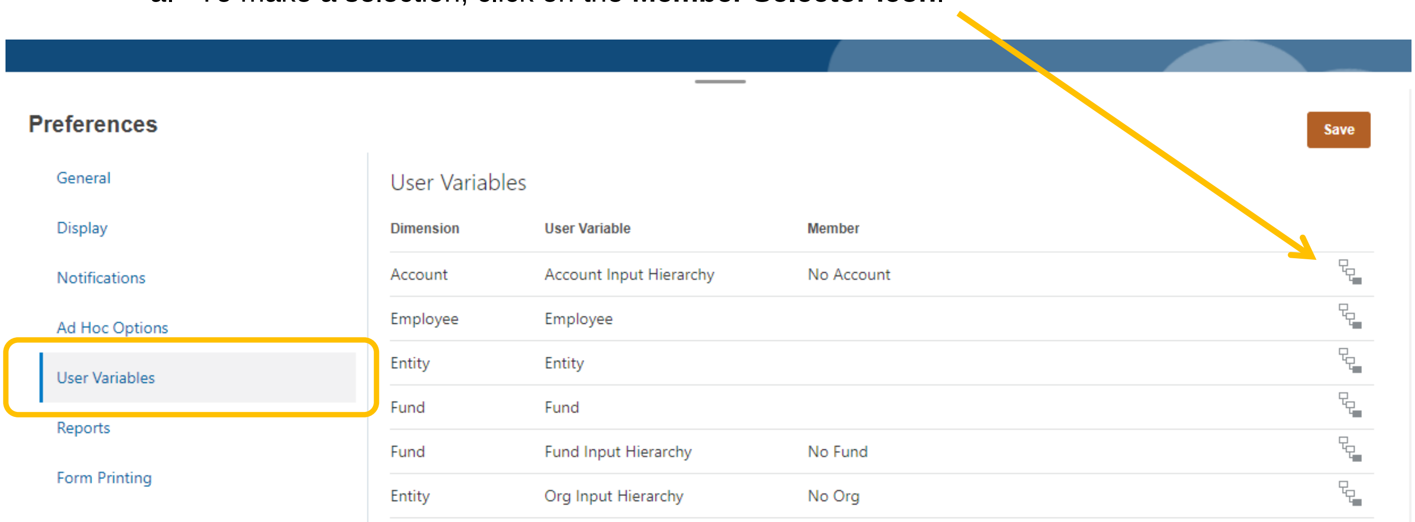
Setting Your Point of View

To begin working in the UMPlan forms, you must first set a Point of View. This is a starting point to viewing information in the forms and will only need to be set the first time you log in.

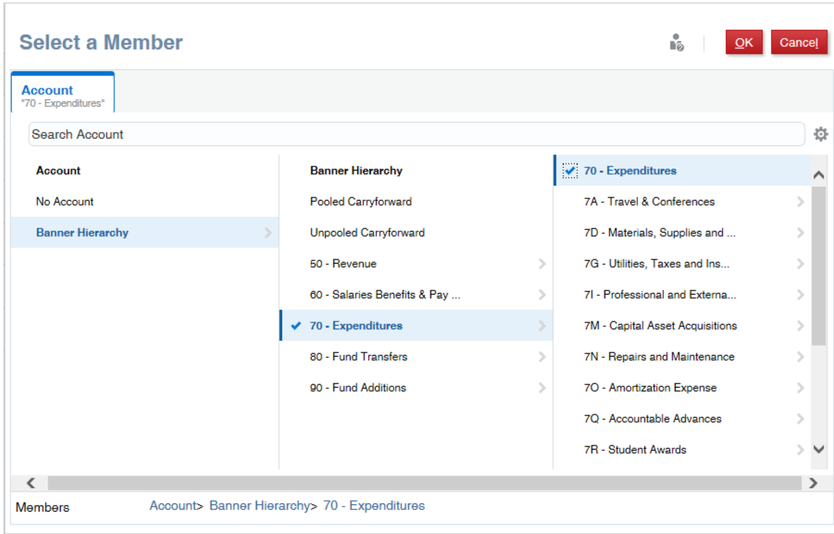
1. Select the **Tools** tile and choose **User Preferences**.



2. In the window that appears, choose the tab **User Variables**.
   You must make a selection for **Account Input Hierarchy**, **Fund Input Hierarchy** and **Organization Input Hierarchy**.
    a. To make a selection, click on the **Member Selector icon**.

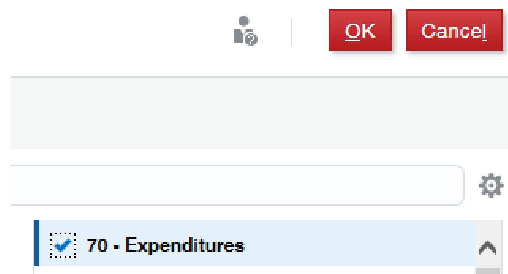


b. Enter a code in the search bar then press **Enter** on your keyboard to be provided with the search results. Alternatively, you can navigate through the Banner Hierarchy to locate a code.



Note: Non-salary accounts will only be visible at a 3 digit level.

c. Click on the **checkmark** to the left of the code to mark the selection then click **OK**.

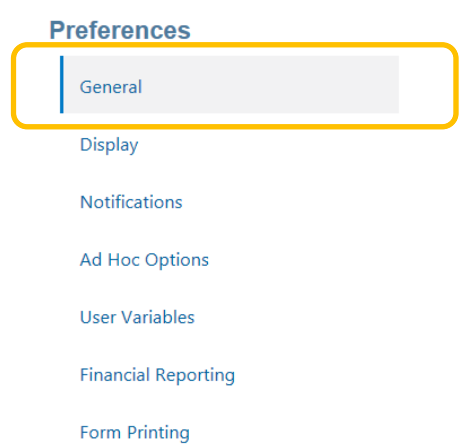


Repeat step 2 for Fund Input Hierarchy and Organization Input Hierarchy.

3. Click **Save** when all selections have been made. Confirmation that the data has been saved will appear, click **OK** to continue.
4. Click the **Home** icon to return to the homepage.

Set Date and Time

1. In the **User Preferences** tile, select the **General** tab.
2. Make the following selections:
   Profile:
   a. Time Zone: **(UTC-06:00) Central Time (Canada) (CT)**
   Alias Setting:
   b. Alias Table: **Default**
   c. Display Member Label as: **Alias**
3. Once all selections have been made, click **Save**. Confirmation that the data has been saved will appear, click **OK** to continue.
4. Click the **Home** icon to return to the homepage.



*<u>Optional</u>: **Number Formatting,** located in the Display tab, allows you to change the appearance of values such as the separator used for thousands or the colour to display for negative values.*

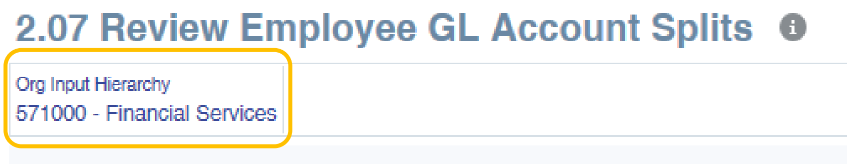
Navigating in Forms

Once your Point of View has been set, you will be able to navigate through the forms available in UMPlan. In all forms, there will be the same navigation buttons but every form will have a different function and purpose within them. Review how to identify the function of the cells, adding comments and navigating the different views in forms.

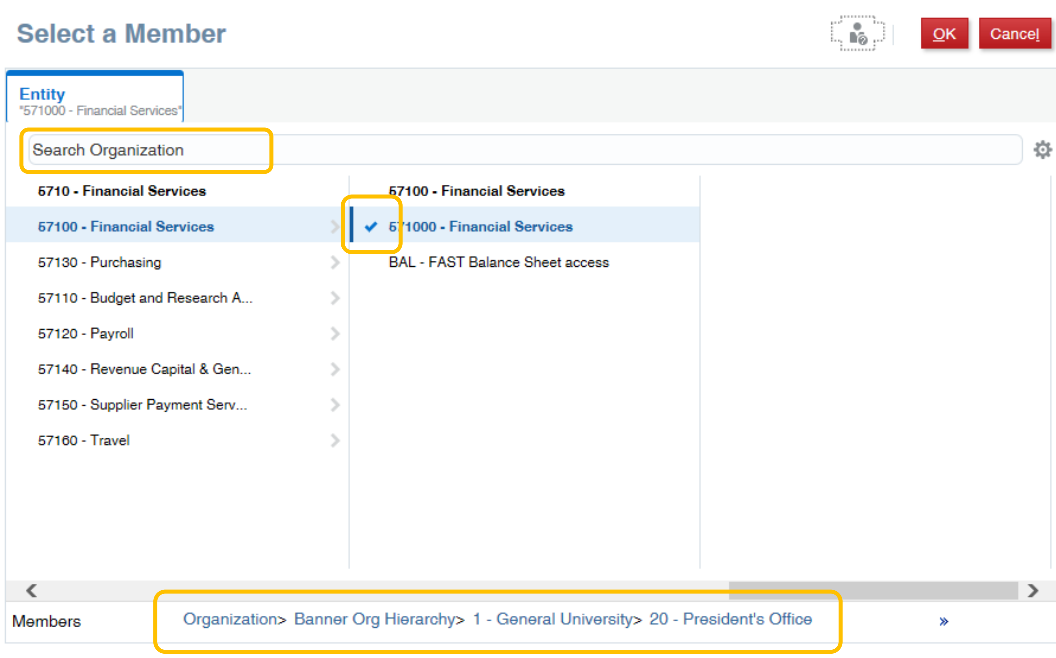
Changing the Point of View

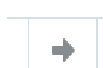
Even though you have set your Point of View, it can be changed in any form you are working within UMPlan.

1. To select a different Fund or Org, click on the **title of the Chart of Account element** (e.g. *Org Input Hierarchy*) or the **code** currently presented.



2. A new window will open with the mapping of the hierarchy. You can Search in the field provided or navigate through the hierarchy to select the code.
   a. When your desired code is located, click the **checkmark** to make your selection then click **OK**.



3. When returned to the form, click **Go**  to update with form point of view.

Note*: You can also access the option to change a Point of View by clicking the pencil icon.* 

Navigation Buttons

- **Find icon:** Search the page for information such as an account or an amount.

- **Actions**: Provides a list of actions that can be taken on the cells in the current form. The options will differ from each form. ***Note****: Right-clicking in a cell will provide you will the same options as the list in Actions.*
- **Save**: Keep changes made in a form.
- **Refresh**: Updates the page to reflect any changes that have been made by other users.

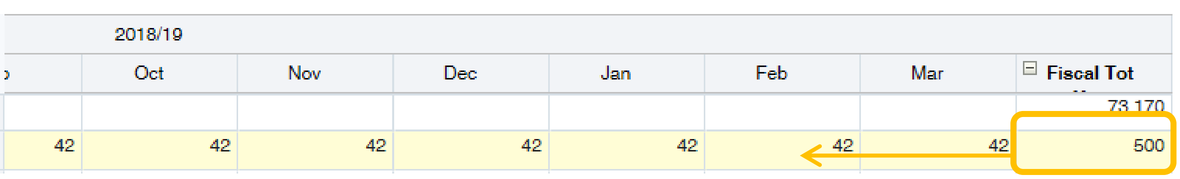
- **Data:** Options to edit, add supporting details (such as comments and attachments), view change history, print, filter and sort.
- **Ad hoc**: Not in use.
- **Format**: Optional formatting such as to save, clear or wrap text and change font.

Data Entry

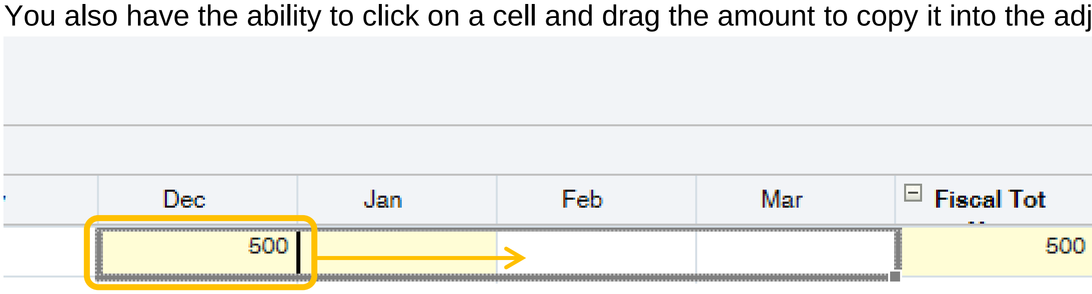
When working in forms, cells will be coloured to identify their function. The following is a list of colours that will be displayed:

- White – data enterable.
- Light yellow – data has been enterred but not yet saved.
- Grey – calculated totals or non-data enterable.
- Orange – information needs to be added or changed.

In a row where all data enterable cells are blank, you have the ability to enter an amount in the Fiscal Total column and it will automatically distribute it through the months displayed. Once an amount has been populated in a month, any changes made to the total column will be prorated for the existing amounts.

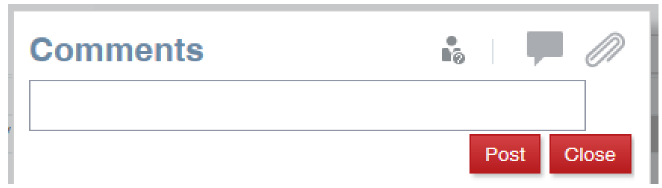


You also have the ability to click on a cell and drag the amount to copy it into the adjacent cells.



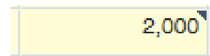
Adding a Comment

Comments can be added to individual cells. To add a comment, follow the steps below:



1. Right click in the cell and select **Comments**.
2. A new window will appear, enter a comment in the space provided.
3. When complete, click **Post**.
4. You will remain in the window with the comment just added, click **Close** to return to the form.

A green triangle indicator will appear in the top right of the cell to signify that a comment has been added.



Forms

Some forms may have various views available.To change a view, select one of the options in top portion of the form.