

CalPlanning Upgrade

Introduction

We have upgraded CalPlanning and made other infrastructure changes to improve system performance and reliability. These changes also restore compatibility with newer browsers and operating systems. Because this is an upgrade to a new environment, ***every planner will need to do some first-time setup.***

This job-aid contains information on:

- [Campus VPN network requirements](#)
- [Web browser & operating system compatibility](#)
- [First time set-up of web browsers](#)
- [Smart View & operating system compatibility](#)
- [Changes after you log in and setting your default application](#)
- [Enabling Reporting POV preview](#)
- [Setting CalPlan and HCP MyOrg preference](#)
- [Three options for copy and paste](#)

Berkeley Campus Network Required

CalPlanning is only available on the UC Berkeley network or through Citrix.

If you are not on campus, you will need to connect to the bSecure Remote Access VPN (aka GlobalProtect) before trying to reach CalPlanning or use Citrix.

Web Browser & Operating System Compatibility

We recommend using CalPlanning with Chrome on Windows 10 or through Citrix to receive the best support from the Help Desk and the CalPlanning team.

You may use these browsers:

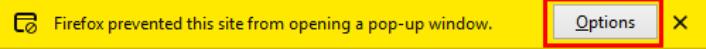
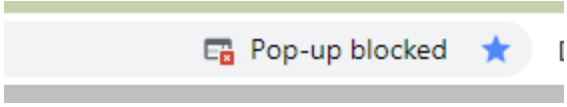
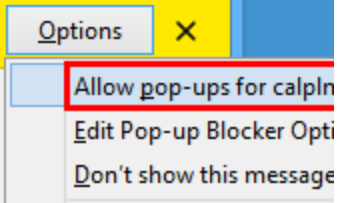
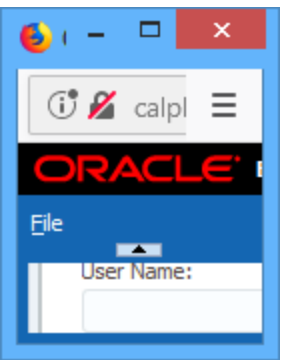
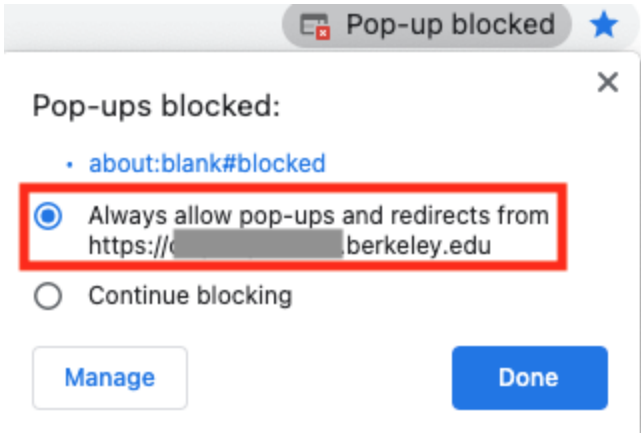
- **Google Chrome 80+** on Windows 10
- **Microsoft Edge 80+** on Windows 10
- **Firefox ESR** on Windows 10
- Chrome and Firefox on Apple Mac OS X is not officially supported by Oracle but it generally works

If you experience issues, the Help Desk or CalPlanning team may ask you to try Citrix to troubleshoot whether the problem is with your browser.

Note: Internet Explorer is no longer supported for CalPlanning. We have observed significant problems with Internet Explorer and CalPlanning and recommend that you use Google Chrome.

Web Browser Setup - Allow Pop-up

You will need to configure your web browser to allow pop-ups from the CalPlanning server. This is needed one time only for each browser that you use to connect to CalPlanning (unless you completely clear/reset your browser). Below are instructions on setting up Firefox and Chrome.


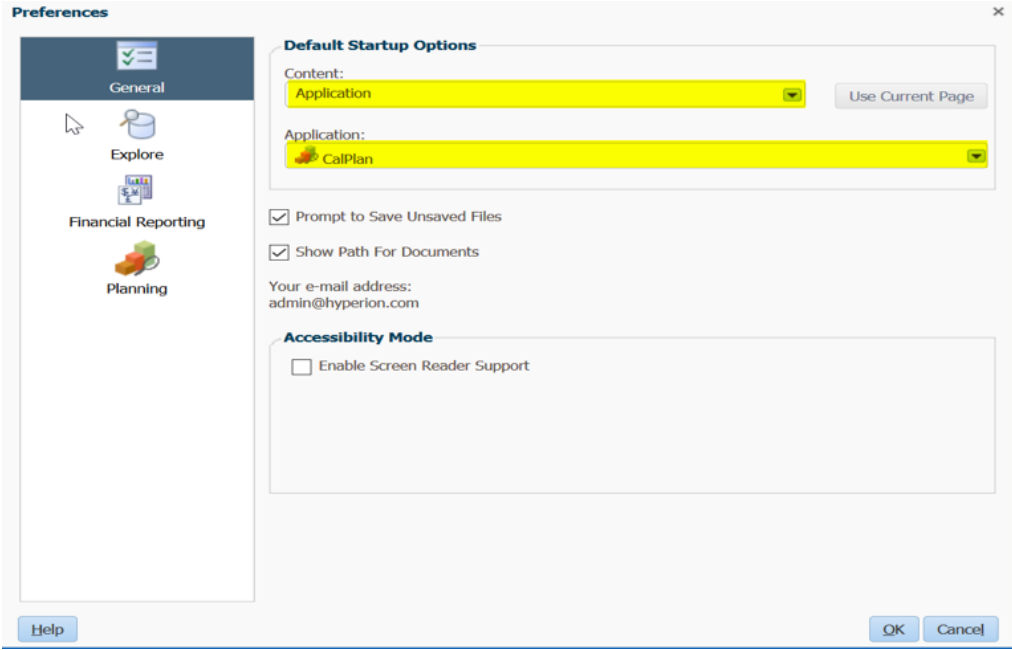
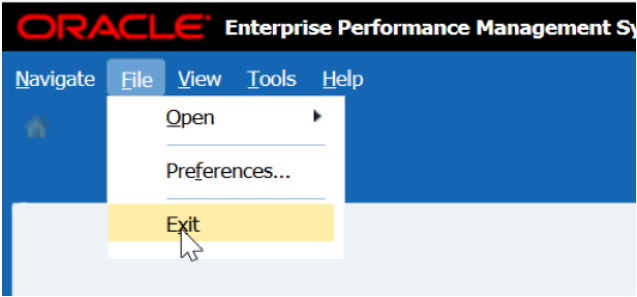
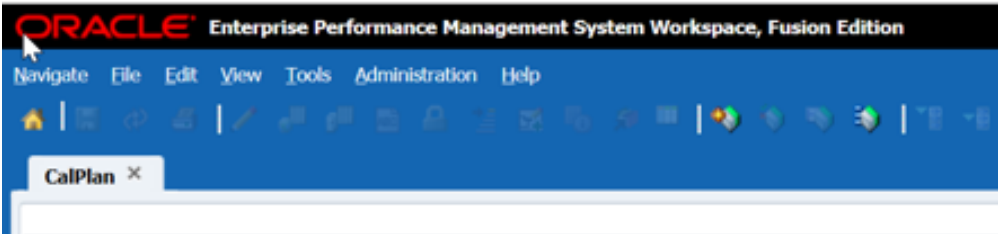
Firefox	Chrome
<p>Point your web browser to the CalPlanning website https://calpln-rptportal.berkeley.edu/workspace/index.jsp</p>	
<p>You'll see a warning that Firefox prevented the site from opening a pop-up window. Click the Options button.</p> 	<p>You'll see a note that Chrome blocked the pop-up. Click on it.</p> 
<p>Select Allow pop-ups for calpln-rptportal.berkeley.edu</p>  <p>Close the window that looks like this screenshot.</p> 	<p>Select Always allow pop-ups and redirects from https://calpln-rptportal.berkeley.edu. Click the Done button.</p> 
<p>Refresh the window that you originally used and to see the CalPlanning login screen.</p>	

Smart View and Operating System Compatibility


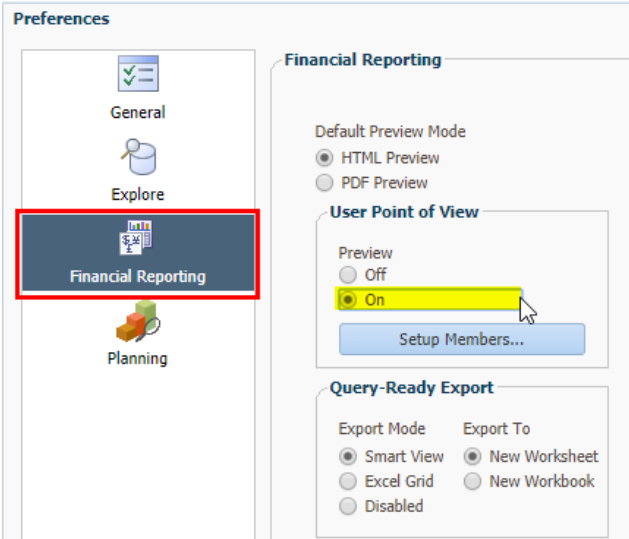
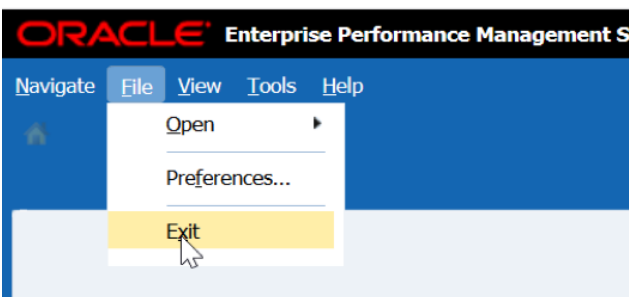
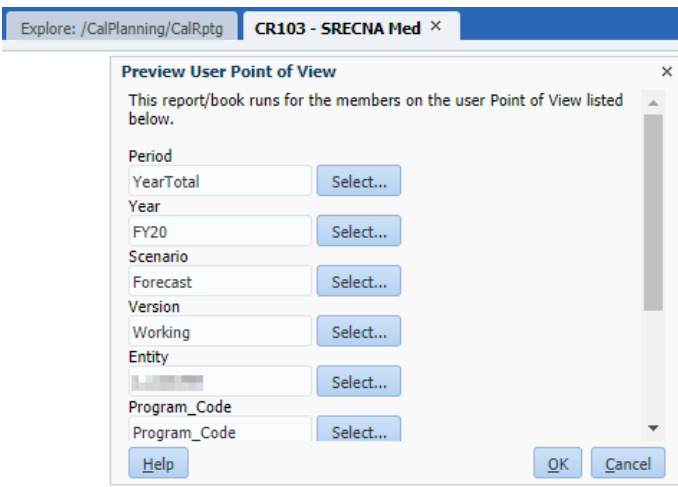
The newest version of the [Oracle Smart View plug-in](#) is compatible with Windows 10 combined with Excel 2016 or Excel 2019. Mac users need to use Citrix to access Smart View.

To confirm the version of Smart View you have installed: First, from Excel select your Smart View tab. Second, Choose the Help option and select About(z)...from the content drop-down list. The Smart View version will then be displayed for you.

Set Default Application

<p>1. To set a default application to be available immediately after logging in, go to the File menu and select Preferences...</p>	
<p>2. Click the General icon in the left panel to open the Default Startup Options.</p> <p>From the content drop-down list, select Application.</p> <p>From the Application drop-down list, select CalPlan (or HCP)</p> <p>Click OK.</p>	
<p>3. In order for the preferences to become active, you will need to log off the application.</p> <p>Go back to the File menu and select Exit.</p>	
<p>4. After you log off and login again, you will see the application that you selected.</p>	

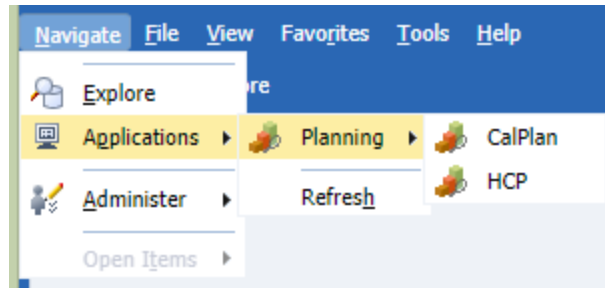
Enable Reporting POV Preview

<p>1. To set a default application to be available immediately after logging in, go to the menu and select File/Preferences....</p>	
<p>2. Click the Financial Reporting icon in the left panel.</p> <p>In the User Point of View section, select On.</p> <p>Click OK.</p>	
<p>3. In order for the preferences to become active, you will need to log off the application.</p> <p>Go back to the File menu and select Exit.</p>	
<p>4. After you log off and login again, you will see the reporting POV preview when running reports. This will allow you to change the prompts before the reports appear.</p> <p>Note: This upgrade restores the feature that stores/remembers the reporting POV that you last used.</p>	

Set CalPlan and HCP MyOrg Preference

1. In order to see and edit data in CalPlan and HCP, you'll need to set your CalPlan and HCP MyOrg preference.

Go to the menu and select **Navigate\Applications\Planning** and choose either CalPlan or HCP.



2. Click **Preferences in the left panel.**

Click the **User Variable Options** tab at the top of the User Preferences in the right panel.

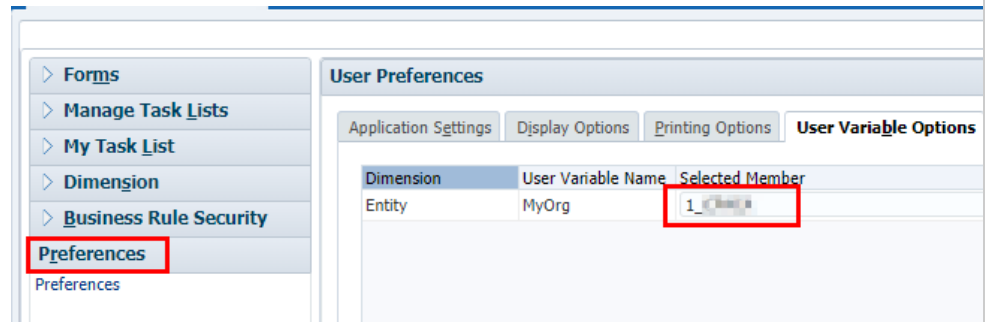
Enter an Entity in the Selected Member text box.

Please select an entity that will not bring back more than 1,000 data rows.

For CalPlan, **we suggest an Org level 3 or 4 or lower.**

For HCP, **we suggest an Org level 4 or 5 or lower.**

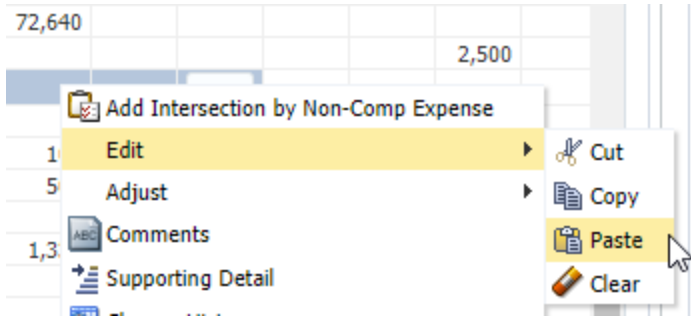
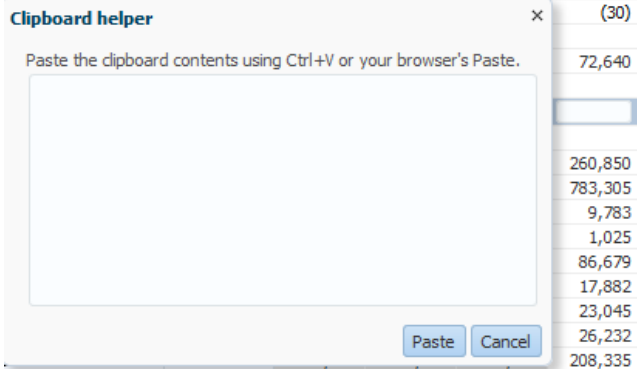
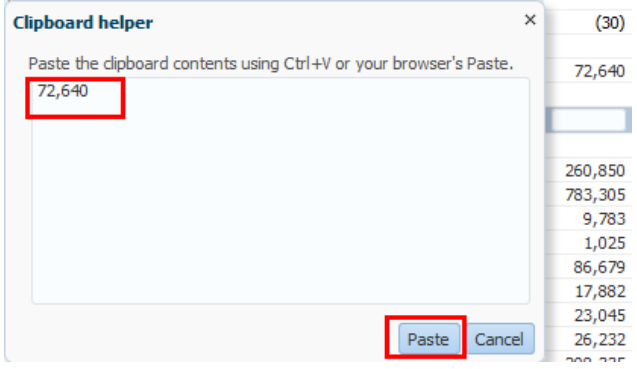
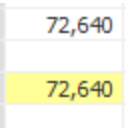
Click the **Save** button.



3. Click **OK** from the User preferences have been saved pop up box.

Copy and Paste

There is a change in functionality with copy and paste and you have two choices for pasting: right-click or use the keyboard command to paste (CTRL+V on Windows or CMD+V on Mac). Below is what you'll experience with each choice.

Right-click to Paste	Keyboard Command to Paste [CTRL+V] on Windows or [CMD+V] on Mac
Select text or numbers you want to copy and copy as you normally would.	
Select the cell(s) in CalPlanning that you want to paste to.	
<p>Right-click and select Edit\Paste</p> 	<p>Use the keyboard command to paste [CTRL+V] on Windows or [CMD+V] on Mac.</p> <p>The Clipboard helper window opens.</p>  <p>Paste the copied text/numbers into the text box and click the Paste button.</p> 
<p>The numbers will be pasted in the cell(s). As usual, new unsaved numbers are marked with a yellow background. Click the Save icon to save the new data.</p> 	

Another option is to use [Smart View for Planning](#) to copy and paste in Excel Smart View.