

May 9, 2006

Dear QDB/FPM Users,

We are pleased to announce the release of a complete manual as well as an enhanced version of QDB/FPM as described below:

I. Thanks to Eilish Hathaway, we now have a complete manual for FPM & QDB/FPM. To access this 130-page manual (don't worry it is mostly printscreens!) please go to the Dean's Office Web site (www.deans.medsch.ucla.edu) and click the "Write-Ups" button. In the section entitled FPM & QDB/FPM, click on the link entitled "FPM & QDB/FPM Manual - Version 1.0 (May 2006)", which is in pdf format.

The manual is divided into six sections

Section I: Introduction, provides information on getting up and running with FPM and QDB/FPM and how to get help.

Section II: Monthly Reporting on Contracts and Grants to PIs, gives users a guide on how to convert current reports to FPM and QDB/FPM

Section III: FPM Working in Conjunction with QDB/FPM, details interactions between these two programs

Section IV: Using FPM, provides detailed information on the menu options and screens in the FPM program

Section V: FPM/Budget Tab, gives users information on the use of FPM during the budget process

Section VI: Appendix, contains useful tables and other information.

There is a detailed Table of Contents that we hope will facilitate finding information for users. Please refer to this to find specific sections or information you are interested in.

Since this is Version 1.0 of the manual, we welcome and encourage your suggestions for the next version. If you have questions or suggestions please send them to Eilish Hathaway (ehathaway@mednet.ucla.edu) or Rita Moreno (rmoreno@mednet.ucla.edu).

II. Effective immediately we are releasing a new version of QDB/FPM including the enhancements described below. Thanks to Mike Hassanvand and Alan Illescas for making the changes and Rita Moreno for her help with the testing. To benefit from these new features, please close and open Excel. By logging into QDB/FPM, you should see the new version date of 5/8/06 at the top of the login screen. If you don't see the new date, that means you don't have the auto-update version of the program. Please contact your CSC for assistance.

Enhancements:

1. Summary by Sub - Internal Fund Title, Internal PI, Fund Manager and Comment fields will be pulled from Chart of Accounts. Added Recharge ID and Project End Date to the report. The report will specify whether it is YTD or ITD and the projection column will indicate the date through which the projections are included.
2. Payroll closing transition period - Every month payroll ledgers close towards the end of the month or at the beginning of the new month. For a few days payroll data is in transition before it is included in the open table. With the new version of the program, during this transition period, FPM payroll data adjusts for this by temporarily setting the most recent payroll month to the previous month. While this is in effect, there will be a warning message on the "Status Screen" of QDB/FPM.
3. Summary of Funds - You now have a choice of including or excluding 9H for this report. You also have the option of having an additional column in this report which shows the current balance before the projections. The default sort order of the batch which comes from FPM Chart of Accounts is: fund, cc, account. You can change the sort order if you would like.

4. Salary by Month - on the date screen, two check boxes have been added. One for choosing "Current Fiscal Year" and the other for "Current Grant Year". Also, the report now has a border around the columns containing data for future months.
5. Expense by Month - Subtotal columns have been added to separate subtotals for past actual data from future data. Also, the same two new date selections as described in No. 4 above have been added to Exp. by Month.