

Enhancement to FPM: Daily Refresh from EDB Info and Addition of “No Refresh” flag and employee Comments field

October 20, 2005

We are in the process of implementing an important enhancement to FPM which facilitates the exchange of employee information between EDB and FPM. The following paragraphs describe this update and in addition there will be a meeting on Monday, October 24, 2005 from 9-10 am in Room 33-105 CHS to further explain the changes and to answer any questions you may have. Please attend this meeting if possible.

The implementation of this update will take place in two phases.

For Phase I effective Monday October 24th a new check box called “No Refresh” and a new “Comments” field are being added to the Staff and Other Academic Salary Projection Screen (more information on both of these features is below)

For Phase II effective Tuesday Nov. 1st, 7 a.m., full implementation of the daily refresh process will commence. Again, more information on this is below.

The period between October 24th and November 1st is to allow users the time to identify and flag those employees who should be marked as “No Refresh” by clicking on the check box for each employee. For example all TBN employees should be flagged as "No Refresh". Otherwise, they will get deleted on November 1st. Also, any comments that you don't want to be lost will need to be copied in the new comment box, as explained below.

Here is more information on the update process.

FPM Update:

Based on issues related to the upcoming range adjustments and input from users we are adding an important new feature to FPM. Previously when a department began implementing FPM a one-time download of all distributions data from EDB was performed. This download entered the data for all staff and non-plan faculty into FPM. Once the download was done all future updates made to EDB had to be manually updated in FPM. As of Tuesday, November 1, 2005 the following will occur.

1. Every morning, at 7 a.m., the program will download all funding data for Staff and Other Academic in the School. In other words the program will delete and reinsert all funding data for all employees on a daily basis.
2. The program will add to FPM any new employees who are in this download but not in FPM.
3. The download will delete from FPM any employee who has been terminated and whose distribution end dates have passed. For employees on leave, the leave may be either with or without pay. If the employee is on leave without pay they will be deleted from FPM when the download is done. An employee on leave with pay will not be deleted.
5. The handling of benefit rates, retroactive salary adjustments and salary increases in FPM will not be affected.

7. There will be circumstances for which you will NOT want to refresh, i.e., override FPM with QDB information for an employee. For this reason we have created a “No Refresh” check box. A department will have the ability to check or uncheck this box for each employee at any time. The “No Refresh” box will belong to an employee. If the employee has a joint appointment in two departments, either department will be able to mark or unmark the “No refresh” box, but it will affect all funding for that employee.

Usage of the “No Refresh” check box in FPM

Under most circumstances you will want FPM to reflect the data that is in QDB. However there may be situations that warrant setting the flag for an employee to “No Refresh”, in which case FPM data will intentionally NOT match what is in QDB. For example,

TBN Employee: A PI has told a fund manager that they will be hiring an SRA II in four months. You want FPM to show this employee so that you can project the impact of his salary on the grant. You would enter the employee as TBN in FPM with the appropriate distribution start and end dates. You would then check the “No Refresh” box so that the TBN employee is not deleted during the daily download. [Note: once employee is hired and entered in EDB if you have “No Refresh” checked you will need to either delete the TBN employee in FPM OR uncheck the “No Refresh” flag, otherwise there will be two entries for the same employee].

Retroactive salary corrections for a terminated employee: An employee is terminating but retroactive salary corrections are anticipated. You would flag the employee as “No Refresh” so that the employee information will be retained in FPM after the termination date. Occasionally retroactive salary corrections are required for an employee who is no longer in EDB or FPM; in this instance you could enter the correction as a lump sum expense rather than indicating line by line retroactive correction entries.

Employee with an indefinite end date in EDB: A career employee is entered in EDB with an indefinite end date in his distribution line(s). You want FPM to show the end date to match the current budget period of the grant. You would enter the appropriate end date in FPM and check the “No Refresh” box. This would preserve the grant end date in the distribution line(s) in FPM.

There will be other circumstances unique to departments that mandate the use of the “No Refresh” box. Any situation where the user wants FPM to have different information than is in QDB requires the use of the flag.

Search features: Once the update is implemented you will be able to search for all individuals who are flagged as “No Refresh”. This will facilitate changing the status of these employees if needed.

Comment field: Currently in FPM there is a comment field associated with each distribution. The daily download from QDB will “clear” this comment field, unless the individual is marked as “no refresh”. To allow users to associate comments with an employee a new “Comments” field is being added. Since this new comment field is tied to the person and not to the distribution line, it will not be affected by the refresh feature. There will be one comment field per employee but the field will be large enough to allow multiple lines. These comments will be visible whenever the record for an employee is viewed. However if a fund manager wishes to retain the distribution line comments the employee should be flagged “No Refresh” which will preserve the comment lines but all future updates to FPM for that employee will have to be done manually.