Enhancements to FPM dated 6/15/2016

Users brought to our attention that the existing “No Refresh” feature in FPM/Staff & Other Academic was not adequate, since it prevented refresh of other valuable information such as change in salary, etc. On Wednesday, June 15th, we will be rolling out a new version of FPM addressing this issue. Currently you can mark an employee as “No Refresh” in the Staff & Other Academic screen and maintain all future funding lines for this person manually in FPM. This concept is changing such that:

- employees will not be marked as “No Refresh” any more;
- QDB distributions will be pulled in and will project salaries for all employees;
- you will have the ability to enter lines in FPM to adjust projections in any way you like;
- these lines will be automatically marked as “Manual Entry” and will be editable, as opposed to lines coming from QDB being read-only.

Here is some additional information regarding this new implementation:

- For the same employee there can be “Manual” rows as well as distribution rows downloaded from QDB.
- Daily refresh will only refresh QDB rows and will NOT affect the manual rows.
- “Manual” rows will be marked with a red asterisk on the left hand side in the salary grid, so you can easily identify them.
- “Manual” rows will “supplement” the QDB rows; “not replace” them.
- Therefore:
  - If an employee’s end date is 6/30/16 and you wish to extend their appointment for projection purposes, enter a manual row starting 7/1/16. (you can use the “Copy As New” feature to minimize keystrokes). When the actual distribution starting 7/1/16 is entered in EDB, you will need to remove the manual entry in FPM to avoid doubling the projection.
  - If you need to end projection for an employee sooner than the end date in EDB, enter a negative line (i.e. negative dist %) for the period you wish to remove.
  - If you want to change the funding that is already in QDB, then you could reverse the QDB entry with a manual line with a negative dist % and enter another manual line with the revised funding.
- To help you keep track of manually entered projections, in QDB/GLPPP FPM Excel Add-in Salary reports (Salary by Month or Salary & Percentage by Month) $ values that come from manual lines will be in blue and bold font.

Rollout & Conversion:
On June 15th, you will see that all the distributions for employees who were marked as “No Refresh” will be marked as “Manual Entry”. QDB nightly refresh will not touch these lines, but will bring in all the distributions in QDB additionally. As a result, some projections might be exaggerated, due to both manual lines and QDB lines existing in FPM. For example, if you have a distribution in QDB going out to 8/31/2016, and you know that the employee’s end date is sooner, let’s say 6/30/2016, you may have marked the employee as “No Refresh” in FPM, and changed the end date of the distribution to 6/30/2016. Right after the conversion, you will see two lines in FPM, the original QDB line going out to 8/31/2016, and the “Manual” line ending on 6/30/2016. If you run a report at this time, you will see projections doubling for June, and then continuing out to August because both lines project. You will need to go through the employees who have manual funding lines and clean up the funding lines as needed. For example, in the given example, you will need to reverse the QDB distribution ending on...
8/31/2016. (To do this, click on the QDB distribution, click on Copy As New button, change % Dist to negative, Save record.) This cleanup will be needed just once following the conversion.

**Action Required On or After June 15th:**
After the conversion, you should go into FPM, bring up the Find Staff & Other Academic Employee screen, click on “Manual Entry” check box, so that you can see a list of all employees that were marked as “No Refresh” before and have manually entered funding lines. You should go through each of these employees and take a look at their distributions to see if they should be adjusted and adjust them as needed.