

# SOFTWARE PROGRAMS ALL FUND MANAGERS SHOULD HAVE INSTALLED ON THEIR COMPUTERS

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## **Adobe Acrobat 8.0 Professional (Highly Recommended)** Adobe Acrobat 8 Professional.Ink

### Use this tool to:

- Create an electronic copy of a paper grant proposal submission.
- Add NIH Headers and Footers (i.e NIH Continuation Page) to proposal documents (e.g. Letters of Support).
- Create text boxes on uneditable forms in order to fill out the form. This is great for any form that the only option for completing is either using a typewriter or hand writing.
- Quickly and easily paginate a paper proposal submission (instead of using Word).
- Create uneditable documents from Word, Excel, etc. for sharing or sending via email. This way, the recipient will not be able to change your data.

### Requirements:

- Purchase of a site license for the Adobe Acrobat 8.0 Professional software (~\$30/license – One time fee per computer).
  - Get approval from your MSO, and then contact Department of Medicine Information Services (DOM IS) at x54398 to get a quote, and for software installation.

## **CutePDF Writer**

### **Application Available for Download at:**

<http://www.cutepdf.com/>

Once installed, the application can be accessed via File/Print, then choose printer "CutePDF".

### Use this tool to:

- Create PDFs of Word, Powerpoint, Excel, etc.
- CutePDF tends to be a quicker, easier, and more stable method of creating PDFs versus using Adobe software.

### Requirements:

- Freeware – You should be able to download this application yourself. If not, contact DOM IS (x54398) to assist you with the download.



Ais.Ink

## **Administrative Information Systems (AIS)**

### **AIS Website:**

<http://www.ais.ucla.edu>

**Applications Available:**

- **Purchasing and Accounts Payable system (AP00)**
  - View historical data for BruinBuy/PAC orders.
- **Employee Database (EDB)/Personnel Payroll System (PPP)**
  - Prepare online UPAYs.
  - Query employee payroll funding information.
- **Financial Systems (FS00)**
  - View fund balances.
  - Query FAU information such as status, linkages, Recharge ID #, & F&A rate.
- **Student Information Systems (SIS)**
  - Query stipend payments.

**Requirements:**

- AIS Login ID and password.
- Access granted by Departmental Security Administrator (DSA).
  - Access requested via MSO sending an [AIS System Access Request Form](#) to the DSA.



Fpm.Ink



Dean's Office Programs.Ink

***Financial Projection Module (FPM)*****Application Information:**

[http://www.deans.medsch.ucla.edu/Deans/dn\\_fpm.htm](http://www.deans.medsch.ucla.edu/Deans/dn_fpm.htm)

**Application Manual:**

[http://www.deans.medsch.ucla.edu/Ftproot/pub/manuals/FPM\\_Manual.pdf](http://www.deans.medsch.ucla.edu/Ftproot/pub/manuals/FPM_Manual.pdf)

**Use this tool to:**

- Enter future expense data that will be integrated into your monthly financial statements.
  - Works in conjunction with QDB/GL PPP FPM Adhoc.
- Add comments to an FAU (via the Chart of Accounts) that will be integrated into your Summary by Sub report from QDB/GL PPP FPM.
- View Chart of Accounts for your Division.
- Create Batch Sheets for use in QDB.
- Assign a Fund Manager, Internal PI, and Fund Nickname to an FAU in the Chart of Accounts.
- View Plan Faculty Funding
  - Data should be updated by MSO, NOT Fund Manager.

**Requirements:**

- QDB Login and password.
- QDB access granted by Departmental Security Administrator (DSA) AND SOM Dean's Office.
  - MSO should send an [AIS System Access Request Form](#) to the DSA.

- In addition, access to FPM will have to be granted via SOM Dean's Office. Contact Rita Moreno.
- Contact DOM IS (x54398) to have program installed on your computer.



Financial Reporting App.Ink



Dean's Office Programs.Ink

## ***Financial Reporting Application (FRA)***

### **Application Manual:**

[http://www.deans.medsch.ucla.edu/Ftproot/pub/manuals/FinReportingApp\\_Overview\\_Jun30\\_05.pdf](http://www.deans.medsch.ucla.edu/Ftproot/pub/manuals/FinReportingApp_Overview_Jun30_05.pdf)

### **Use this tool to:**

- Run the monthly overdraft report for your division.
- Run a report on ALL active funds for your division (current or historical).
- Import data into Excel for easy data management.

### **Requirements:**

- QDB Login and password.
- Contact DOM IS (x54398) to have program installed on your computer.



Launch Internet Explorer Browser.Ink

## ***Internet Explorer (version 7.0 & up)***

### **Use this tool to:**

- Access all web based AIS systems (e.g. Online Financial Reporting Application, ERS, BruinBuy).
  - Internet Explorer is the preferred web browser for these applications.

### **Requirements:**

- All computers should automatically have Internet Explorer installed. If not, contact DOM IS (x54398) for assistance with installation.



Mozilla Firefox.Ink

## ***Mozilla Firefox (version 3 & up)***

### **Application Website:**

<http://www.mozilla.org/>

### **Use this tool to:**

- Prepare grants in Cayuse.
  - Firefox is the preferred web browser for Cayuse.

### **Requirements:**

- Freeware – contact DOM IS (x54398) for assistance with installation.



## Query Database (QDB) – School of Medicine Dean's Office Version

### Application Information:

[http://www.deans.medsch.ucla.edu/Deans/dn\\_Ais\\_SQL7.htm](http://www.deans.medsch.ucla.edu/Deans/dn_Ais_SQL7.htm)

### Application Manuals:

[http://www.deans.medsch.ucla.edu/Deans/dn\\_writeups.htm](http://www.deans.medsch.ucla.edu/Deans/dn_writeups.htm)

Once installed, access via Excel, Tools menu.

### Applications Available:

- **QDB/GL PPP FPM Adhoc**
  - Run monthly financial statements for your funds.
  - Query historical financial data into Excel for easy data management.
- **QDB/PAC**
  - Query BruinBuy/PAC data, and import into Excel for easy data management.
- **QDB/EDB**
  - Query Personnel/Payroll data, and import into Excel for easy data management.
  - Also requires EDB inquiry access granted by DSA.
- **RNET/QDB**
  - Query proposal data and import into Excel for easy data management.

### Requirements:

- QDB Login and password.
- QDB access granted by Departmental Security Administrator (DSA).
  - MSO should send an [AIS System Access Request Form](#) to the DSA.
- Contact DOM IS (x54398) to have programs installed on your computer.

## List of Login IDs Fund Managers Need to Establish

- **AIS Login ID**
  - Contact DOM DSA to establish
  - The AIS Form will need to be completed & emailed by your division MSO.  
[http://medschool.ucla.edu/workfiles/Site-ORA/resourcesforPI/ais\\_request\\_form.pdf](http://medschool.ucla.edu/workfiles/Site-ORA/resourcesforPI/ais_request_form.pdf)
- **Department of Medicine Network ID**
  - Contact DOM IS Office to establish
  - The DOM IS New User Form will need to be completed and signed by your division MSO.  
<http://medschool.ucla.edu/ora/mso-resources>
- **Department of Medicine Email Exchange Account**
  - Contact DOM IS Office to establish
  - The DOM IS New User Form will need to be completed and signed by your division MSO.  
<http://medschool.ucla.edu/ora/mso-resources>

- **eRA Commons ID**
  - Contact Cathy Rujanuruks, Raellen Man, or your OCGA analyst to establish.
    - For PI accounts, send an email with the following information: PI's full name, email address, date of birth, social security #, and previous NIH grant # (if applicable).
    - For Post Doc accounts, send an email with the following information: Post Doc's full name, email address, and date of birth.
    - For Assistant account, send an email with the following information: Assistant name, email address, and UCLA PI to be linked to.
  
- **QDB Login ID**
  - Contact DOM DSA to establish
  - The AIS Form will need to be completed & emailed by your division MSO  
<http://medschool.ucla.edu/ora/mso-resources>
  
- **UCLA Logon ID**
  - Visit the UCLA Logon Website to establish
    - <https://logon.ucla.edu/>
  
- **Cayuse S2S**
  - Establish a Professional Profile for the User (if you are the user, have someone else in you division, or Cathy or Raellen, establish the Professional Profile for you).
  - Make sure the user has a UCLA Logon ID.
  - Once the Professional Profile and UCLA Logon ID have been established, send an email request to DOM DRA, with the User name, email address, and employee ID #.
  - DOM DRA will then send the new user request to  
[s2sgranthelp@research.ucla.edu](mailto:s2sgranthelp@research.ucla.edu)