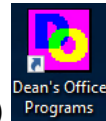


HOW TO DESIGNATE FUND MANAGER IN FPM

Revised March 21, 2022



1. Log into Financial Projection Module (FPM)
 ***Instructions on how to access FPM as of 11/18/19. Requires Duo authentication.
<https://uclahs.app.box.com/s/kv7qygfs17kx339e24vnc0qm016aaiyo>
2. Open "Chart of Accounts" under your Division's Dept code
 - Choose Internal PI to specify/narrow your search
 - Make sure Internal PIs are assigned accurately/completely**
3. Click on row to highlight the entry you would like to modify
4. Using the drop down menu under "Fund Manager," locate the name of the fund manager you wish to designate to the highlighted project
 - Names listed in alphabetical order by first name.
 - If a FM is not listed, that means s/he is not in the FPM system. See [Access Matrix](#).
5. To add comments or change internal fund title to QDB/GLPPP FPM reports, type here

Financial Projection Module - Main Menu - Catherine Y. Rujanuraks - [Chart of Accounts 1198]

Income & Expense Chart of Accounts C&G Data Overall Reports Utilities Fiscal Year: 2008-09

Chart of Accounts 1198XX Funds

Search By: Dept 1574 - M/NANOMEDICIN Account CC Fund Fund Manager Internal PI NEL ANDRE

☐ All ☐ 0 Balance ☐ Expired Rchg ID

Search Clear To Excel Batch Batch - Sub

Account	CC	Fund	Fund End	Project End	Dept	Balance	Rchg ID	Sub	Exp.
441353	AN	12345	9/9/2025		1574 - M/Nanomedicine	3,872.35			<input type="checkbox"/>

PI Internal PI Fund Title Internal Fund Title

CHANCELLOR NEL ANDRE UCLA FDN/UCLA FUND SUPPORT CHANCELLOR

Fund Grouping Fund Manager Replace Comments F/A Rate

Gifts Rowell Ramos 10% Nel - Chancellor support. 0% Show

Account	CC	Internal PI Name	Fund Mgr	Expired	Internal Fund Title	PI Name	Fund Group	F&A
441353	AN	NEL ANDRE	Rowell Ramos	No	CHANCELLOR	CHANCELLOR	Gifts	0
441353	AN	NEL ANDRE	Rowell Ramos	No	SCAQM Proj 1/ FROINES	FROINES, JOHN R	C&G - Local	10.0
441353	AN	NEL ANDRE	Rowell Ramos	No	PARTICLE CENTER	FROINES, JOHN R	C&G - Federal	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	ATHERO	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	DEP TOX	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	AGING	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	PROTEOMICS	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	PARTICLE TOX	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	UNEXPENDED BALANCE - UCLA		Sales and Ser	0
441353	AN	NEL ANDRE	Rowell Ramos	No	NANO TRAINING GRANT		State Appropri	0
401053	2E	NEL ANDRE	Rowell Ramos	No	NANO SKIN TEST SERVICE		Sales and Ser	0
401053	2D	NEL ANDRE	Catherine Y. Rujanur	No	DIVISION ZEE (NANO SKIN TES		Compensation	0
401353	AN	NEL ANDRE	Rowell Ramos	No	ZEE BANK		Compensation	0
441353	AN	NEL ANDRE	Rowell Ramos	No	ASHTMA Yr. 2 PROJECT 1	NEL, ANDRI E	C&G - NIH	54.0
441353	N4	NEL ANDRE	Rowell Ramos	No	ASTHMA Yr. 2 CORE A	NEL, ANDRI E	C&G - NIH	54.0
441353	AN	NEL ANDRE	Rowell Ramos	No	PEPPER Yr. 1	REUBEN, DAVID B	C&G - NIH	26.0
441353	AN	NEL ANDRE	Rowell Ramos	No	CNSI ADMIN SUPPORT		C&G - State	0
401053	2D	NEL ANDRE	Rowell Ramos	No	OPPORTUNITY FUNDS		Indirect Cost R	0
441353	AN	NEL ANDRE	Rowell Ramos	No	MERCK FROSST GIFT	NEL, ANDRI E	Gifts	0

6. To mass replace a Fund Manager A* with new Fund Manager B
 - a. Find Fund Manager A's name in the "Fund Manager" drop down box
 - b. Click "Search"
 - c. Highlight 1st row
 - d. Click red "Replace" button
 - e. Find Fund Manager B's name in the "Replace With" drop down box
 - f. Click "Replace"
 - g. Click "Yes"
 - h. The change will be made

* If Fund Manager A is no longer with DOM and his/her name is not pulling up under "Fund Manager", email Charles Lamoreaux cglamoreaux@mednet.ucla.edu with the names of both fund managers and he can manually make the changes on the SOM side.

Financial Projection Module - Main Menu - Catherine Y. Rujanuraks - [Chart of Accounts 1198]

Income & Expense Chart of Accounts C&G Data Overall Reports Utilities Fiscal Year: 2008-09

Chart of Accounts 1198XX Funds

Search By: Dept Account CC Fund Fund Manager Internal PI

1574 - M/NANOMEDICIN [] [] [] Catherine Y. Rujanuru []

☐ All ☐ 0 Balance ☐ Expired Rchg ID []

a **b** Search Clear To Excel Batch Batch - Sub

Account	CC	Fund	Fund End	Project End	Dept	Balance	Rchg ID	Sub	Exp.
441353	AN		9/9/2025		1574 - M/Nanomedicine	(2,232.28)			<input type="checkbox"/>

PI Internal PI Fund Title Internal Fund Title

CHANCELLOR NEL ANDRE UCLA FDN/UCLA FUND SUPPORT CHANCELLOR

Fund Grouping Fund Manager Replace Comments F/A Rate

Gifts Catherine Y. Rujanuraks 10% Nel - Chancellor support. 0% ☐ Show

Account	CC	Fund	Balance	Rchg ID	Internal PI Name	Fund Mgr	Expired	Internal Fund Title	PI Name	Fund Group	F&A Ra	Dept	Comments
441353	AN		(2,232.28)		NEL ANDRE	Catherine Y. Rujanur	No	CHANCELLOR	CHANCELLOR	Gifts	0	1574	10% Nel - Chance
441353	AN		107,873.52		NEL ANDRE	Catherine Y. Rujanur	No	PARTICLE CENTER	FROINES, JOHN R	C&G - Federal	54.00	1574	Yr. 1 10/05-09/06
441353	AN		80,920.14		NEL ANDRE	Catherine Y. Rujanur	No	ATHERO	NEL, ANDRI E	C&G - NIH	54.00	1574	Budget Years 08/0
441353	AN		1,642.79		NEL ANDRE	Catherine Y. Rujanur	No	DEP TOX	NEL, ANDRI E	C&G - NIH	54.00	1574	1'st NCTE expirat
441353	AN		45,034.37		NEL ANDRE	Catherine Y. Rujanur	No	AGING	NEL, ANDRI E	C&G - NIH	54.00	1574	1'st NCTEx end di
441353	AN		16.35		NEL ANDRE	Catherine Y. Rujanur	No	PROTEOMICS	NEL, ANDRI E	C&G - NIH	54.00	1574	1'st NCTEx end di
441353	AN		58,710.77		NEL ANDRE	Catherine Y. Rujanur	No	PARTICLE TOX	NEL, ANDRI E	C&G - NIH	54.00	1574	Submittal to Pub

c **d**

Financial Projection Module - Main Menu - Catherine Y. Rujanuraks - [Replace Fund Manager]

Income & Expense Chart of Accounts C&G Data Overall Reports Utilities Fiscal Year: 2008-09

Replace the current Fund Manager's listed accounts with a new Fund Manager.

Current FM: Catherine Y. Rujanuraks

Replace With: Rowell Ramos **e**

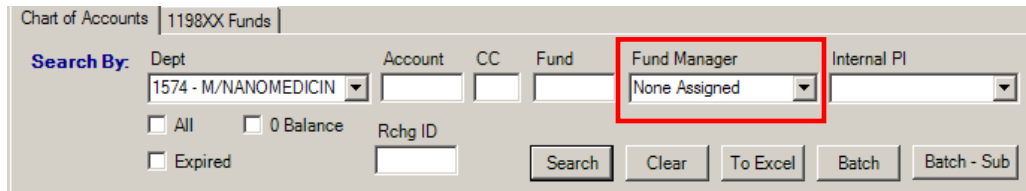
Replace Cancel **f**

FPM - Confirm FM Replacement

Are you sure you want to replace ALL accounts listed from your search for current Fund Manager "Catherine Y. Rujanuraks" with Fund Manager "Rowell Ramos"? **g**

Yes No **h**

7. At *least* once every other month, search for Fund Manager “None Assigned” for new funds in your Division that have no fund manager assigned. Then assign the appropriate FM.



The screenshot shows a web-based search interface for the Fund Manager (FPM) system. At the top, there are tabs for "Chart of Accounts" and "1198XX Funds". Below this, a "Search By:" section contains several dropdown menus and checkboxes. The "Fund Manager" dropdown is highlighted with a red rectangle and is currently set to "None Assigned". Other dropdowns include "Dept" (set to "1574 - M/NANOMEDICIN"), "Account", "CC", "Fund", and "Internal PI". There are also checkboxes for "All", "0 Balance", and "Expired", and a text input field for "Rchg ID". At the bottom right, there are buttons for "Search", "Clear", "To Excel", "Batch", and "Batch - Sub".

** To add new Internal PIs that do not pull up in drop down list, complete [FPM New Internal PI List Template](#) & follow instructions on form to submit