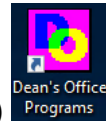


HOW TO DESIGNATE FUND MANAGER IN FPM

Revised November 8, 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
 - Make sure Internal PIs are assigned accurately and completely**
 - 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
 - Choose Internal PI to specify/narrow your search
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. Rujanuruks - [Chart of Accounts]

Income & Expense Chart of Accounts Overall Reports Utilities Fiscal Year: 2018-19

Chart of Accounts 1198XX Funds

Department: 1553 - M/CARDIOLOGY
 Sub Div: Agency Funds
 Fund Group: C&G - Clinical Trials
 Account: [] CC: [] Fund: [] Internal PI: DEMER, LINDA L
 Outside Linked Accounts: []
 All: [] 0 Balance: [] Expired: []
 ARR A: []
 Rchg ID: Fund Manager
 Search Clear To Excel Batch

Account	CC	Fund	Fund End	Project End	Dept Acct Owner	Balance	Rchg ID	Sub	Exp
441357	LD		12/31/9999		1553 - MEDICINE-CARDIOLOC			03	

PI: [] Internal PI: DEMER, LINDA L Add New PI Fund Title: THEODORE LAUBISCH RESE Internal Fund Title: DEMER - LAUBISCH RESEAF Fund Group: Endowments

Fund Manager: Catherine Y. Rujanuruks Acct Owner Comments: YT=5%. Previously 36627. \$ Fund Owner Comments: F/A Rate: 0.00% Show

Fund Manager	Internal Fund Title	Balance	Rchg ID	Internal PI Name	Fund Owner
Catherine Y. Rujanuruks	DEMER - LAUBISCH RESEARCH			DEMER, LINDA L	1400 - DEANS OFFICE-S
Cathy Ryu	CARDIOVASCULAR THEME (DE			DEMER, LINDA L	NONE
Charles Lamoreaux	R38 STARR YR 2 of 3			DEMER, LINDA L	1553 - MEDICINE-CARDI
Christina Grant	R01 SEROTONIN YR 4 of 4			DEMER, LINDA L	1553 - MEDICINE-CARDI
Christopher Bronsdon	R01 EXERCISE YR 2 of 4			DEMER, LINDA L	1553 - MEDICINE-CARDI
Chuck Hajek	DEMER - LAUBISCH RESEARCH			DEMER, LINDA L	1400 - DEANS OFFICE-S
Constance Her	UCLA FDN/CALCIFIC AORTIC VA			DEMER, LINDA L	1553 - MEDICINE-CARDI
Cortney Wisneski	TIBOR FABIAN FUND			DEMER, LINDA L	1553 - MEDICINE-CARDI
	AUTISM GRANT (AUTRAIN)			DEMER, LINDA L	1565 - MEDICINE-DEPT.
	CHAIR'S COMMITMENT (LAB)			DEMER, LINDA L	1565 - MEDICINE-DEPT.

10 records

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.

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 search interface for funds. At the top, it says "Chart of Accounts | 1198XX Funds". Below this, there is a "Search By:" section with several fields: "Dept" (dropdown menu with "1574 - M/NANOMEDICIN"), "Account" (text input), "CC" (text input), "Fund" (text input), "Fund Manager" (dropdown menu with "None Assigned" selected and highlighted by a red box), and "Internal PI" (dropdown menu). Below these fields are checkboxes for "All", "0 Balance", and "Expired", along with a "Rchg ID" text input. At the bottom right, there are buttons for "Search", "Clear", "To Excel", "Batch", and "Batch - Sub".