This session will not be recorded, but this PowerPoint can be found at:
https://medschool.ucla.edu/research/researcher-resources/administrative-support/department-medicine-office-research-administration/fund-management-training
Ascend 2.0 Disclaimer (& Commercial 😊)

- **Ascend 2.0** is well underway!
  - "...is an ambitious, multi-year initiative to re-imagine the landscape of UCLA’s financial systems”
  - “UCLA has experienced remarkable growth since the development of the current financial systems four decades ago. Adopting modern, scalable, cloud-based systems will empower UCLA’s continued growth and the financial operations needed to support it.”

- Ascend will affect all areas of research administration!
  - Chart of Accounts (aka COA, currently called FAU)
    - Finance
    - Procurement
    - Contract & Grant Administration
    - Payroll....

Go live:
- **COA**
  - **June 2023**
- **BruinBuy Plus**
  - **October 2023**
- **Bruin Finance**
  - **December 2024!**
## Types of Logins – **Access Matrix**

<table>
<thead>
<tr>
<th>LOGIN</th>
<th>SAMPLE FORMAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• QDB</td>
<td>• MECYR: 1\textsuperscript{st} 2 digits = Dept. ME for Medicine. Last 3 digits = initials.</td>
</tr>
<tr>
<td>• AIS</td>
<td>• MECYR: Same as QDB. But password may be different!</td>
</tr>
<tr>
<td>• Medicine Administration</td>
<td>• Crujanuruks: email address before “@mednet”. Often first initial + last (or 1\textsuperscript{st} &amp; last) name.</td>
</tr>
<tr>
<td>• aka: AD login</td>
<td>• Created by you. Now requires <strong>DUO as secondary authentication</strong></td>
</tr>
<tr>
<td>• UCLA Logon</td>
<td></td>
</tr>
</tbody>
</table>
Keep in mind some applications allow either type of logins but some applications require a specific type of login, i.e. NIH eRA Commons requires UCLA login.

Make sure you’re entering the appropriate username and/or password for the login you’re using!
Tools Covered Today

**IN DEPTH**
- Financial Web Report
- OASIS^  
- Online Resource Center (Portal)
- PI Portal

*to be covered in depth in future classes

^non-web-based tool. All other are web based.

**INTRODUCTION**
- Post-Award Management System*
- DocumentDirect
- BruinBuy
- UCPath*
- Effort Reporting System*
- DGSOM Specific Tools
  - FPM/QDB*^  
  - Financial Reporting Application (FRA)^  
  - DG Inform
  - OnCore*
Taking a deep dive...
Name of Tool

• **Access**: Type of User Name/Password | Grantor of Access* | Access Form required

• **AKA** (also known as): Other names you might hear tool called

• **How do I access it?**
  • Link to website or other means of getting to tool

• **What do I use it for?**
  • Various uses for the tool

• Following slide is a screenshot of the tool
  * DSA = Departmental Security Administrator
UCLA Financial Web Reports

- Access: UCLA login and password | DSA | AIS Form (for DOM)
- AKA: campus Query Data Base (QDB) or OFSR
- How do I access it?
  - Business & Finance Solutions’ Home Page or direct link
- What do I use it for?
  - Reports/Inquiries: Fund Balances, Account Summary, Detail General Ledger, Recharge Activity & ID, Open Commitment, Consolidated Gift Fund, Table of Funds, Table of Accounts, Sub-Object Code Listing, Consolidated Gift Fund Management...
  - Actions: Npear, TOFs, Recharges, Create new UCPath Project Codes
  - Post Authorization Notification (PANs) & Web DocumentDirect
UCLA Financial Web Reports

FINANCIAL SYSTEM REPORTS
- UCLA Financial Web Reports (CDW)
- UCLA Financial Web Reports
- Payroll Reports
- CG Reports
- PAC/BrinBuy Reports
- BAR Reports
- CASHNET Reports

FINANCIAL SYSTEM KEY ENTRY
- Non-Payroll Expenditure Adjustment
- Transfer of Funds
- Interdepartmental Recharge
- Recharge Order Request

APPLICATONS
- Consolidated Gift Fund Management
- Web DocumentDirect
- PAN - Post Authorization Notification
- CASHNET - Processing Cash Receipts
- CASHNET - Services Application

General Accounting | Logout
You are logged in as C. Y. RIJANANIRUKS
Layout & Navigation for Financial System Reports

- Data Range: Fiscal Year (unrestricted) & Inception to Date (C&G)
- Choose Period: default is current ledger
- Output: can download to Excel
- Drill down by clicking blue hyperlinks
- EFM Resource Slide Deck
**SUMMARY REPORTS**

- Fund Balances*
- Sub-Object Summary*
- Accounts Receivable (A/R)*

**USE/PURPOSE**

- List of linked account/cost centers, fund titles, & balances
- Summary of selected FAU detailed by sub & object codes
- List of outstanding contract & grant A/R balances

*Ability to drill down into further detail without having to exit report! Except for purchase order (PO #s)*
DETAIL REPORTS

• Detail General Ledger*

• Recharge Activity Ledger*

• Open Commitment Subsidiary Ledger*

• Gift Received Undistributed (GRU) – class # 22

USE/PURPOSE

• All transactions posted to the FAU over set accounting period, sorted by sub/object codes

• List of only recharge transactions posted

• Transaction detail that support open encumbrances and/or memo lien balance for FAU, i.e. expenses that have not yet hit the closed ledger. POs will appear on report until balance is $0.

• Transaction information & balances for dept’s portion of the Chancellor’s undistributed gift fund
TABLES REPORTS

• Table of Accounts

• Table of Funds*

• PI Listing

• Recharge ID by Department

• GAEL & Suspense Redirect FAU – classes # 7-10

USE/PURPOSE

• List of all linked account/cost centers, cost center assignments, and acct/cc titles assigned to dept

• List of active fund #s assigned to dept

• List PI’s status & UCLA 9 digit ID #

• List of recharge IDs assigned to FAUs within dept, fund title, overhead base & rate

• UCPath redirect FAU information
Financial System Key Entry

• Key Entry Systems allow for us to **make changes** to financial data
  
  • **Non-Payroll Expenditure Adjustment (NPEAR)** – update any part of the FAU
  
  • **Transfer of Funds (TOF)** – transfer funds between accounts/cc NOT between funds
  
  • Recharge System – process internal recharges (UCLA vendor & customer) from a pre-set up sales & service, i.e. UCLA Biology Storeroom charges UCLA PI for supplies purchased from oncampus storehouse.
    
    • Requires special **one-time training** and recharge access form to obtain access
Applications

• Applications mostly allow for us to **view details** of financial data
  
  • **Consolidate Gift Fund Management** (class # 22) – mainly useful to look up Foundation gift fund information
  
  • **Web DocumentDirect** – retrieve University official ledgers
  
  • **PAN – Post Authorization Notification** – review financial detail for non-payroll transaction processed, i.e. Purchase Order details, TOF, Npears, etc.
UCPath

- UCPath allows us to view UCPath default information such as
  - Project codes already set up & available for use
    - We can also request new project codes to be set up! It takes 1 business day turnaround
  - General Liability (GAEL) & Suspense redirect (classes # 7-9) – where these unallowable/defect expenses are being charged.
OASIS

FINANCIAL DATA LOOKUP
OASIS

• Access: AIS login and password | DSA | AIS Form (DOM)

• How do I access it?
  • Connection Central or OASIS icon on Desktop. If you don’t see either there, call IT to install

• What do I use it for?
  • *Only way* to look up some fund/FAU financial information.
OASIS

• **FSoo** – Financial systems
  • Used mostly by Central Offices (Accounting, EFM, etc.) for ACTION
  • Used by Departments to VIEW/BROWSE
    • Status of fund # or FAUs – i.e. closed, open, etc
    • Look up recharge IDs, F&A rate, account title, managing investigator, etc
    • Tables: AC, AF, FN, RC

• **APoo** – Purchasing and Accounts
  • Replaced by **BruinBuy**

• **PPP** – Personnel/Payroll System
  • Replaced by **UCPath**
OASIS

Use cursor to select application OR type Transaction ID: ___

Student Information Systems (SIS )
Financial Systems (FSBO)
Purchasing and Accounts Payable System (APBO)
Personnel/Payroll System (PPP )
Events System (EVM )
UCLA ID System (UIDS)
DACSS/ASAP Distributed Access Systems (DA01)
Report Distribution System (RDS )
Staffing List System (SLS )
Navigation

• FSoo > Selection: 1. Table Maintenance | Location: 4 (UCLA) > Action: B (browse) | Table: AC, AF, FN | Request: Enter parameters

***FSoo = FS zero zero

• AC – Account/CC
  • Provides information RE: managing PI (owner of acct/cc), check if account/cc are linked

• AF – Account/CC-Fund
  • Provides information RE: if FAU is open/closed, recharge ID assigned, F&A rate & base, FAU title

• FN – Fund
  • Provides information RE: if fund is open/closed, Sponsor, home PI, project period, fund type, PATS #, etc.
ORA Online Resource Center
(ORA Portal)

• Access: UCLA login and password | portal@research.ucla.edu | see “Get Help” in upper right hand corner - *add’l access form

• How do I access it?
  • Via Web: http://portal.research.ucla.edu

• What do I use it for?
  • **General Statistics:** Awards, Proposals, IRB & ARC stats, Dept Dashboard
  • **Pre-Award:** Investigator Directory Search, NIH/NSF Other Support & PI Portfolio Tools*, Cayuse,
  • **Post-Award:** Award Status & Snapshots (class #2), Access to: PAMS, ERS, Smart Closeout Tool (aka COP)
  • **Compliance:** PHS Conflict of Interest Status & CITI Training, IRB Protocol Status, Salary Cap Report, ERS Status
  • Links to other UCLA C&G related forms and information
ORA Online Resource Center (ORA Portal)

### General Statistics

#### REPORTS
- Award Data Reports
  - Current Year Award Stats by Dept, PI
  - Prior Year Data Download by Dept
  - Advanced Search & Snapshot Report
- Proposal Data Reports
  - Current Year Proposal Stats by Dept, PI
  - Prior Year Proposal Data Download by Dept
  - Advanced Search Tool
- Awarded Dollars for Last 12 Months
- IRB Statistics
  - Approval Counts
  - Review Cycle Times
  - Award Dollars
- ARC Statistics
  - Approval Counts
  - Review Cycle Times
  - Award Dollars
- IRB and ARC Approval Counts
  - 2,308 IRB Approvals FY 2022-2023
  - 487 ARC Approvals FY 2022-2023

#### LATEST STATISTICS
- Current FY Awarded-to-Date Dollars and Counts
  - $975,990,599 (4,386)
  - FY 2022-2023
- Current FY Requested-to-Date Dollars and Counts
  - $2,708,402,843 (3,519)
  - FY 2022-2023
- Awarded Dollars and Transaction Counts
  - $1,722,668,066 (7,258)
  - FY 2021-2022
  - $1,607,202,701 (7,190)
  - FY 2020-2021
  - $1,426,986,822 (6,730)
  - FY 2019-2020
- Requested Dollars and Transaction Counts
  - $4,737,188,337 (6,173)
  - FY 2021-2022
  - $5,142,122,294 (6,334)
  - FY 2020-2021
  - $4,261,328,266 (5,900)
  - FY 2019-2020
- Sponsored Project Expenditures
  - $1,061,117,082
  - FY 2021-2022
  - $1,213,641,508
  - FY 2020-2021
  - $1,104,185,397
  - FY 2019-2020

#### DASHBOARDS
- Department Dashboard
PRE-AWARD TAB TOOLS

• Investigator Directory Search
• Other Support Tool/PI Portfolio
• Cayuse

USE/PURPOSE

• Distinguish between those authorized to be PI or require exception; gives title & home dept
• Help create NIH/NSF OS – list of current/pending support data
• System-to-system (S2S) web-based tool for preparing, validating & submitting proposals via grants.gov for Sponsors such as NIH, NSF, AHRQ, CDC, NASA, DOD/CDMRP
POST-AWARD TAB TOOLS

- Award Status & Snapshot Report
- **PAMS** (class #12)
- **Effort Reporting System (ERS)** (class #17)

USE/PURPOSE

- Provide C&G award data, past & current, access to Award Snapshots
- Web portal to upload closeout packets, access submitted deliverables, assist in managing closeout/deliverable workload – upcoming, due, and overdue
- Web system to assist in the creation, tracking and certification of effort reports required for Federal C&G
<table>
<thead>
<tr>
<th>COMPLIANCE TAB TOOLS</th>
<th>USE/PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PHS COI Certification Report</td>
<td>• Track conflict of interest (COI) required by Public Health Service (PHS), i.e. NIH. Dates required for EPASS (page 3).</td>
</tr>
<tr>
<td>• IRB Protocol Status Report</td>
<td>• Report that allows FMs to view the status &amp; grant coverage of IRB approvals for human subject research studies</td>
</tr>
<tr>
<td>• ERS Certification Status Report</td>
<td>• Report to assist with monitoring ERS compliance by listing open reports</td>
</tr>
<tr>
<td>• CITI Training Lookup Tool</td>
<td>• Tool to assist with monitoring CITI required research training compliance</td>
</tr>
</tbody>
</table>
PI Portal

PI SPECIFIC TOOL TO SELF-MANAGE RESEARCH ADMINISTRATION
PI Portal

• Access: UCLA login and password | PI MUST grant access to the Fund Manager (via the Settings menu)

• How do I access it?
  • Via Web: https://piportal.research.ucla.edu/piportal/

• What do I use it for?
  • View what the PI sees
    • Generally the FM will use FPM/QDB, or other tools, instead of PI Portal
  • View Burn Rate for expenditures vs. time lapsed
  • View linked account balances, expenditures & payroll details
  • PI Portfolio Report*: current, expired, pending & not funded awards
  • Other Support templates*  
    *now available to FM in ORA Portal, if access is granted by Dept Chair
PI Portal – Burn Rate
### PI Portal – Fund Detail

**Data from Inception to Date (as of 2/6/21)**

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Budget</th>
<th>Actual Spend</th>
<th>Committed</th>
<th>Current Balance</th>
<th>Anticipated Expenses</th>
<th>Total of Actual &amp; Anticipated Expenses</th>
<th>Manual Adjustments</th>
<th>Projected Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and Wages</td>
<td>$205,259.00</td>
<td>$183,573.80</td>
<td>$0.00</td>
<td>$21,699.20</td>
<td>$0.00</td>
<td>$183,573.80</td>
<td>$0.00</td>
<td>$21,699.20</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>$66,687.00</td>
<td>$54,041.02</td>
<td>$0.00</td>
<td>$2,745.18</td>
<td>$0.00</td>
<td>$54,041.02</td>
<td>$0.00</td>
<td>$2,745.18</td>
</tr>
<tr>
<td>Supplies and Expenses</td>
<td>$167,592.00</td>
<td>$229,171.40</td>
<td>$23,314.69</td>
<td></td>
<td>($88,394.09)</td>
<td>$229,171.40</td>
<td>($88,394.09)</td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>$180,719.08</td>
<td>$202,057.58</td>
<td>$0.00</td>
<td></td>
<td>($21,309.95)</td>
<td>$202,057.58</td>
<td>($21,309.95)</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>$2,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$1,879,469.00</td>
<td>$1,879,469.00</td>
<td>$0.00</td>
<td></td>
<td>$1,879,469.00</td>
<td>$1,879,469.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Subcontracts</td>
<td>$407,943.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td>$407,943.00</td>
<td>$407,943.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Other Expenses</td>
<td>$1,753,642.00</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td></td>
<td>$2,056,852.71</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total Direct Costs</strong></td>
<td>$4,437,452.32</td>
<td>$3,437,031.46</td>
<td>$23,314.69</td>
<td></td>
<td>$23,314.69</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td>$2,056,852.71</td>
</tr>
<tr>
<td><strong>Indirect Costs</strong></td>
<td>$2,056,852.71</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td></td>
<td>$2,056,852.71</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td>$2,056,852.71</td>
</tr>
<tr>
<td><strong>My Account(s) Subtotal</strong></td>
<td>$4,437,452.32</td>
<td>$5,493,884.16</td>
<td>$23,314.69</td>
<td></td>
<td>$2,056,852.71</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td>$2,056,852.71</td>
</tr>
<tr>
<td><strong>MED PULMONARY/FAC...</strong></td>
<td>$43,051.44</td>
<td>$16,551.13</td>
<td>$0.00</td>
<td></td>
<td>$16,551.13</td>
<td>$16,551.13</td>
<td>N/A</td>
<td>$16,551.13</td>
</tr>
<tr>
<td><strong>CHEMABIO FACULTY</strong></td>
<td>$111,150.24</td>
<td>$71,067.77</td>
<td>$0.00</td>
<td></td>
<td>$30,182.47</td>
<td>$71,067.77</td>
<td>N/A</td>
<td>$30,182.47</td>
</tr>
<tr>
<td><strong>Linked Account(s) Subtotal</strong></td>
<td>$141,101.68</td>
<td>$87,618.90</td>
<td>$0.00</td>
<td></td>
<td>$53,678.78</td>
<td>$53,678.78</td>
<td>N/A</td>
<td>$53,678.78</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>$4,437,452.32</td>
<td>$5,493,884.16</td>
<td>$23,314.69</td>
<td></td>
<td>$23,314.69</td>
<td>$2,056,852.71</td>
<td>$0.00</td>
<td>$5,493,884.16</td>
</tr>
</tbody>
</table>
BREAK!

FEEL FREE TO ASK QUESTIONS DURING OUR BREAK BY UNMUTING YOURSELF OR TYPING IN CHAT!
Now to the shallow end...

INTRODUCTION TO VARIOUS OTHER PROGRAMS
Post-Award Management System (PAMS)*

FINANCIAL DELIVERABLES, WORKLIST, UPLOAD CLOSEOUT PACKETS
PAMS

• Access: UCLA login and password | Authorized Department Administrator (DOM = Kathryn Hirayanagi) | New User Form

• How do I access it?
  • EFM’s Website or ORA Portal – Post-Award tab

• What do I use it for? EFM Training Material

• Now:
  • Review financial responsibilities, deliverables (such as invoices submitted by EFM), when reports are due, access old closeout documents, and accounts receivable, expired funds to close report
  • Upload closeout packets created using RAPID Smart Closeout Tool (class #12)
  • Facilities & administrative cost reconciliation tool (class #11)
DocumentDirect

• Access: UCLA login and password | DSA | AIS Form (for DOM)

• How do I access it? – 2 options
  • Payroll Website under Web Applications
  • UCLA Financial Web Reports under Applications – Web DocumentDirect

• What do I use it for?
  • View & print official document of record for all University reports such as General Ledgers (FS100)
BruinBuy

• Access: UCLA login and password | DSA w/CAO approval | AIS Form (DOM) BruinBuy training req’d prior to access

• How do I access it?
  • Purchasing & Accounts Payable Home Page or direct link

• What do I use it for?
  • Review Purchase Order (PO) or Low Value Order (LVO) details
  • Release encumbrances
  • Process “receiving” for large dollar amount/important POs such as subawards (class # 25)
  • Set up Subaward requisitions (class # 25)
  • To be replaced by BruinBuy Plus (powered by Jaggaer) in 10/16/23!
UCPath

• Access: UCLA login and password | DSA w/CAO approval | AIS Form (DOM) | UCPath Training req’d for specific role

• How do I access it?
  • Central Resource Unit Home Page under UCPath Login

• What do I use it for? (Lab # 7-9b)
  • Look up
    • UCPath ID (different from University ID (UID)/Bruin ID)
    • Department Affiliation, Title & Title Code
    • Pay Rate
  • Review/Process
    • Funding Entries (future payroll)
    • Direct Retros – payroll expense transfers (correct past payroll)
UCPath
Effort Reporting System (ERS)*

EFFORT TRACKING SYSTEM
ERS

• Access: UCLA login and password | DSA w/CAO approval | AIS Form (DOM)

• How do I access it?
  • EFM’s Website or ORA Portal – Post-Award tab

• What do I use it for? (Class #17 & EFM offers ERS Class)
  • Review & verify effort contributed on Federal C&G
  • Use as tracking to ensure appropriate person with first hand knowledge certifies effort prior to certification deadline
Effort Reporting System
DGSOM Specific Tools
School of Medicine FPM/QDB*

FINANCIAL REPORTING & INQUIRIES
SOM Financial Projection Module (FPM)

• Access: QDB login and password | DeansOfficeDSA w/CAO approval | Must have PPDDBINQ access granted by DSA prior to request to Dean’s Office DSA.

• How do I access it?
  • Dean’s Office Application Dashboard icon installed on your Jump Server desktop. Instructions on how to access here.

• What do I use it for? (Class #5)
  • View Chart of Accounts for your Dept or PIs
    • Assign Internal PI Name & Fund Manager
    • Add comments & fund “short names” for the Summary By Sub financial reports
  • Enter manual payroll and non-salary projections to appear in SOM QDB financial statements
SOM Financial Projection Module
School of Medicine (SOM) QDB

• Access: QDB login and password | DSA | AIS Form (DOM)

• How do I access it?
  • Jump Server Excel – highly recommended. Instructions [here](#).
  • Desktop Excel, under Add-ins, Dean’s Office Programs or QDB/GLPPP FPM Ad Hoc Reporting
    • If you don’t see, go to contact your IT to ask them to install

• What do I use it for? (Class #5)
  • In conjunction with FPM, SOM QDB is used to produce monthly financial statements and/or run ad hoc financial reports as needed
  • Use to search & sort data quickly
SOM Fiscal Reporting Application

ACCOUNT LISTS & OVERDRAFTS
SOM Financial Reporting Application

• Access: QDB login and password | DSA | AIS Form (DOM)

• How do I access it?
  • QDB/FPM under General Ledger Custom Reports

• What do I use it for?
  • Monthly Overdraft Report
  • List of all Account/Funds in your Division you are responsible for (current or historical)
School of Medicine DG Inform

FINANCIAL REPORTING & INQUIRIES
DG Inform

- Access: AD Mednet user name & password | DeansOfficeDSA | Complete web-based training in Box & submit survey at the end

- How do I access it?
  - Dean’s Office Financial Affairs Home Page or direct link

- What do I use it for?
  - Replacement system for SOM FPM/QDB
    - Financial Reports: GL Detail Closed & Open, Non-Salary Expense Projections, Summary by Sub, Summary of Funds
    - Payroll Report: Employee Sum, Salary by Month
  - Expectation current SOM FPM and QDB Excel Add-in reports will be sunset after the release of the new DG Inform web-based reports
    - Timeline is aligned with Ascend 2.0’s Bruin Finance system
    - Moving forward, DG Inform expected to be a SOM tool only
OnCore | ResearchConnect*

CLINICAL TRIAL RECONCILIATION

UCLA Department of Medicine - Office of Research Administration
OnCore (aka ResearchConnect)

• Access: AD Mednet user name & password | CRIS Help Desk | online required training for specific role must be complete prior to access

• How do I access it?
  • OnCore web portal

• What do I use it for?
  • Managing clinical trials
    • Review/enter budget & invoicing details
    • Assist in patient procedure, billing reconciliation
    • View status of studies
  • Will go in depth in clinical trial series (after class # 25)
OnCore

UCLA Department of Medicine - Office of Research Administration
Homework for Next Week’s FPM/QDB Class/Lab

- In order to follow along, hands-on during next week’s class, make sure you have the following:
  - **Jump Server installed** on your computer desktop. Instructions [here](#).
  - **FPM & DGSOM QDB access provisioned** so you can access Excel Add-in reports
Links from Today’s Class

Fund Manager Tools

- UCLA Financial Web Reports
  - https://fsw.ais.ucla.edu/menu/
- ORA Online Resource Center (ORA Portal)
  - http://portal.research.ucla.edu
- PI Portal
  - https://piportal.research.ucla.edu
- PAMS
  - https://pams.research.ucla.edu/
- BruinBuy
  - https://bruinbuy.ucla.edu/
- UCPATH
  - https://ucpath.universityofcalifornia.edu/
- ERS
  - https://ers.it.ucla.edu/EffortReporting/enterERS.do
- DG Inform
  - https://powerbi.mednet.ucla.edu/pbireports/browse/
- OnCore
  - https://www.researchgo.ucla.edu/oncore
Survey Link

http://goo.gl/forms/C3gdjsL5y1

We appreciate if you would take a few moments to complete a short 7 question anonymous survey to help us improve your training experience. Thank you!