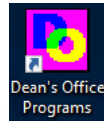


HOW TO DESIGNATE FUND MANAGER IN FPM

Revised July 26, 2021



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
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 he/she is not in the FPM system. See step 1.
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 1198]

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

Chart of Accounts | 1198 Funds |

Search By: Dept Account CC Fund Fund Manager Internal PI

1574 - M/NANOMEDICIN [] [] [] [] NEL, ANDRE

All 0 Balance Rchg ID

Expired []

[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: CHANCELLOR Internal PI: NEL, ANDRE Fund Title: UCLA FDN/UCLA FUND SUPPOR Internal Fund Title: CHANCELLOR

Fund Grouping: Fund Manager: Rowell Ramos Comments: 10% Nel - Chancellor support. F/A Rate: 0% Show

Account	CC	Fund	Fund End	Project End	Dept	Balance	Rchg ID	Sub	Exp.	Internal PI Name	Fund Mgr	Expired	Internal Fund Title	PI Name	Fund Group	F&A
441353	AN	12345	9/9/2025		1574 - M/Nanomedicine	3,872.35			<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	CHANCELLOR	CHANCELLOR	Gifts	0
441353	AN				NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	SCAQMD Proj 1/ FROINES	FROINES, JOHN R	C&G - Local	10.0
441353	AN				NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	PARTICLE CENTER	FROINES, JOHN R	C&G - Federal	54.0
441353	AN				NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	ATHERO	NEL, ANDRI E	C&G - NIH	54.0
441353	AN				NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	DEP TOX	NEL, ANDRI E	C&G - NIH	54.0
441353	AN		57,643		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	AGING	NEL, ANDRI E	C&G - NIH	54.0
441353	AN		0		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	PROTEOMICS	NEL, ANDRI E	C&G - NIH	54.0
441353	AN		24,491		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	PARTICLE TOX	NEL, ANDRI E	C&G - NIH	54.0
441353	AN		34,895		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	UNEXPENDE BALANCE - UCLA		Sales and Ser	0
441353	AN		23,897		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	NANO TRAINING GRANT		State Appropri	0
401053	2E		599		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	NANO SKIN TEST SERVICE		Sales and Ser	0
401053	2D		86,755		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Catherine Y. Rujanur	No	DIVISION ZEE (NANO SKIN TES		Compensation	0
401353	AN		24,295		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	ZEE BANK		Compensation	0
441353	AN		113,216		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	ASHTMA Yr. 2 PROJECT 1	NEL, ANDRI E	C&G - NIH	54.0
441353	N4		64,610		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	ASTHMA Yr. 2 CORE A	NEL, ANDRI E	C&G - NIH	54.0
441353	AN		-20		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	PEPPER Yr. 1	REUBEN, DAVID B	C&G - NIH	26.0
441353	AN		1,527		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	CNSI ADMIN SUPPORT		C&G - State	0
401053	2D		11,899		NEL, ANDRE				<input type="checkbox"/>	NEL, ANDRE	Rowell Ramos	No	OPPORTUNITY FUNDS		Indirect Cost R	0
441353	AN		50,000		NEL, ANDRE				<input type="checkbox"/>	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. Rujanuruks - [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 → [Fund Manager dropdown]

b → [Search button]

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 SUPPOR CHANCELLOR

Fund Grouping Fund Manager **Replace** Comments F/A Rate

Gifts Catherine Y. Rujanuruk [] [] 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		NDRE	Catherine Y. Rujanur	No	AGING	NEL, ANDRI E	C&G - NIH	54.00	1574	1'st NCTEx end di
441353	AN		16.35		NDRE	Catherine Y. Rujanur	No	PROTEOMICS	NEL, ANDRI E	C&G - NIH	54.00	1574	1'st NCTEx end di

c → [First row of table]

d → [Replace button in table row]

Financial Projection Module - Main Menu - Catherine Y. Rujanuruks - [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. Rujanuruks

Replace With: Rowell Ramos

e → [Replace With dropdown]

f → [Replace button]

FPM - Confirm FM Replacement

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

g → [Yes button]

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 of the search section are five buttons: "Search", "Clear", "To Excel", "Batch", and "Batch - Sub".