HOW TO DESIGNATE FUND MANAGER IN FPM

Revised December 12, 2008

1. Log into Financial Projection Module (FPM)
   - In order to obtain access to FPM, MSO must send an email to Rita Moreno rmoreno@mednet.ucla.edu with 1) fund manager's full name, 2) Dept code, 3) AIS login & 4) phone extension.

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
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 Rita Moreno rmoreno@mednet.ucla.edu with the names of both fund managers and she 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.