HOW TO DESIGNATE FUND MANAGER IN FPM
Revised March 21, 2022

1. Log into Financial Projection Module (FPM)

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

[Diagram of FPM interface with arrows pointing to the areas of Chart of Accounts, Internal PI, Fund Manager, and Internal Fund Title]
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.

** 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