# Fall and Spring Projections

## Loading Data

### Projections by Package

1. Click on the **Projections by Package** link.

2. On the **Budget Package Selection** screen, choose one of the options below:
   - Enter the package number in the **Budget Package** field and click on **Set Package**.
   - OR
   - Use the **Drop-down** button in Budget Package field to locate your package number (clicking on Set Package is not needed and button is grayed out).

   **Note:** Consult your Management Center if your package number is unknown.
3. Review the information about the package chosen, such as the number and name of the Org Unit / BFR code selected for that package and the stage/level.

4. **OPTIONAL**: Once the package is set, follow the summarized steps below to filter within a package to a specific BFR code in that package:
   - Click on the **BFR Hier Filter** button.
   - Click on **Get BFR Hierarchy** button to load the BFR Codes that belong to the Projections package set in the first step; these display on the left side of the screen.
   - Select one or more BFR Codes from the left side and use the **Add** button to move to the right side under **Chosen Selections**.
   - Click the **Done** button.

5. Once selections are made in the previous steps, click on **Load Data** to populate the lower screen with the selected projection data.

6. If data is loaded by package per steps above, skip the next topic and proceed to **Reviewing Columns of Loaded Data**.
1. Click on the **Projections by BFR** link.

2. Ensure the appropriate 4 digit value (e.g., 0010) is entered in the **Company Code** field.

3. Click on the **Set BFR** button.
In the resulting *BFR Hierarchy Selection* window:

4. Enter a single 10 digit BFR Code in the **Single Value** field.

**OR**

5. Click on **Get BFR Hierarchy** to view your BFR Codes on the left and select **BFR Code** as summarized below:

   - If applicable, click on the **arrow** buttons to open the top nodes of hierarchy **Organizational Plan, DUKE – DUKE, and 10 - Duke University** (or other University related companies). This step applies to those with higher level organizational access.

   - Continue to open nodes as needed to find your desired BFR Code(s). If needed, contact your Management Center representative for assistance.

   - Click on the box beside each BFR Code to be selected and use the **Add** button to display the BFR Code under **Chosen Selections** (on the right). Select as many as desired.

6. Once a single value is entered or the BFR Code(s) are chosen using the steps above, click on **Done**.
7. Returning to the Layout screen, verify the correct BFR Code is selected and click on **Load Data**.
Reviewing Columns of Loaded Data

Note: When loading data, you may need to scroll to the top of the data. The view may open at a line item toward the bottom, so simply scroll to the top of the data. Remember to maximize the screen for better viewing as well.

1. Once data is loaded, review and use the columns included in the layout to help you with your projections, as outlined below:

- **Comment** = indicates if comments have been added for the line item – the word “Text” will appear if comments have been added.

- **Fund and Description** = provides the seven digit cost object and description.

- **Fund Group (FG)** = indicates the type of fund / cost object by providing the group (examples: U = Unrestricted, R = Restricted, A = Allocated, etc.).

- **Commitment Item (G/L Account) and Description** = indicates the six digit G/L Account and description related to the line item.

- **Line Item (LI)** = identifies the item number for the Commitment Item / G/L Account; useful especially if adding more lines for a single G/L Account.

- **Budget Package** = this column displays only if data is selected through the Projections by BFR link and references the random number assigned to an organizational unit that is used to facilitate data selection and workflow (column not shown in the example above as this view was selected through the Projections by Package link).

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- **Prior Year Actuals** – displays prior Fiscal Year’s actuals.
- **Current Year Budget Original** – displays current Fiscal Year’s original budget.
- **Current Year Budget Revised** – displays the last Revised Budget numbers from Budget Modifications that have been done.
- **Current Year to Date Actuals** – displays the current Fiscal Year’s year-to-date actuals.
- **Current Year End Fall Projections** – provides a white input column used to enter the Fall Projections or Spring projections, whichever is applicable (the Fall Projections will show in a gray display only column if Spring Projections are being entered).
- **Current Year End Spring Projections** – provides a white input column used to enter the Spring Projections per the next steps.
- **% Change from Current Year Budget Revised** – calculates the change by percentage of the Fall or Spring Projections value compared to the Current Year Budget Revised value.
- **$ Change from Current Year Budget Revised** – calculates the change in dollar value of the Fall or Spring Projections value compared to the Current Year Budget Revised value.
Using Additional Filters

Note: A filter allows you to work with a filtered amount of loaded data. Using a filter basically loads the data again based on the filter chosen versus displaying and working with ALL the loaded data. Therefore, any functions, like Inflate, will apply only to the filtered data that is displayed.

Fund Group Filter

1. To filter and load data for certain fund groups, click on the Fund Group Filter button as summarized below (see Budget Tool Basics Guide for detailed steps on using additional filters).
   - Enter a single Fund Group value or range of values if known.
   - OR
   - To find a Fund Group and select, use the Get Fund Group button to populate all the Fund Groups available for the data.
   - Select one or more Fund Groups from the left side and use the Add button to move to the right side under Chosen Selections.
   - Click the Done button.

2. Review the filtered data that is now loaded in the layout.
Fund Filter

1. To filter and work with certain Funds within the loaded data, use the Fund Filter button (functions like Inflate will only apply to the filtered data).

2. Select the desired Fund by either:
   - Enter a single Fund or range of Funds if known, or populate them by selecting from the drop-down menu.
   - OR
   - Find a Fund and select, use the Get Funds button.
   - Select one or more Fund from the left side and use the Add button to move the selection to the right side under Chosen Selections.
   - Click the Done button.
   - Click Load Data.

3. Review the filtered data that is now loaded in the layout.
1. To filter and work with certain Commitment Items (G/L Accounts) within the loaded data, use the **Commitment Item Filter** button (functions like Inflate will only apply to the filtered data).

2. Select the desired Commitment Item by either:
   - Enter a single Commitment Item or range of Commitment Items if known, or populate them by selecting from the drop-down menu. **OR**
   - Find a Commitment Item and select, using the **Get Cmmt Item** button.
   - Select one or more Commitment Items from the left side and use the **Add** button to move the selection to the right side under **Chosen Selections**.
   - Click the **Done** button.
   - Click **Load Data**.

3. Review the filtered data that is now loaded in the layout.
Entering Projections

1. To enter projections, use one of the options listed below (see individual functions outlined in next pages of this Guide):
   - Use the **Inflate** button to populate the projection values based on a percentage applied to a base value, such as Current Year Revised Budget or Current Year Actuals.
   - **Enter or adjust values** directly in the white input fields under the Projection column.
   - **Create a new line item** for a cost object and commitment item (G/L Account) to add a new projection.
   - Populate the Projection white input fields for selected lines using a **Unit and Rate** calculation. (Example: Projecting Tuition revenue OR expenses for certain purchases like phone lines or other types of equipment).

**Inflate**

*Note: Be careful when using the Inflate function, as this function overwrites any values in the Fall or Spring Projection column for all loaded data (loaded data could be ALL the data or just the filtered data outlined in the next section). The Inflate function also overwrites any values manually entered directly into the Fall or Spring Projection column.*

1. To populate the Fall or Spring Projections input column based on a percentage applied to a base value, click on the **Inflate** button.
2. In the Inflate box, use the **Drop-down** button next to the **Base** field to choose the base value for the inflation:

- **Revised Budget** – use this option to inflate using the Current Year’s Revised Budget value as the base to apply the percentage (entered in the next step).

- **Original Budget** - use this option to inflate using the Current Year’s Revised Budget value as the base to apply the percentage (entered in the next step).

- **Annualize Current Year Actuals** – use this option to inflate by annualizing the Current Year’s Actuals to use as the base to apply the percentage (entered in next step).

- **Current Year Actuals plus Remainder of FY Budget** – use this option to inflate by adding together the Current Year’s Actuals and remainder of the Fiscal Year’s Budget to use as the base to apply the percentage (entered in next step).
3. Once the Base is selected, enter a percentage in the Inflation Percent field as follows:
   - To copy the base value and not inflate, place the number 0 in the Inflation Percent field.
   - To copy and inflate by a certain percentage, enter the percentage as a whole number (use 1 to inflate by 1%, etc.).
   - Use the Calculator drop-down in the field as needed.

4. To apply the percentage entered to the base chosen, click OK.

5. In the Warning box, read the message indicating all loaded data will be inflated, click Yes and click OK.
   
   Note: The No option is defaulted as a reminder that the Inflate function overwrites any values in the Fall or Spring Projection column for all loaded data (loaded data could be ALL the data or just the filtered data outlined in the next section). The Inflate function also overwrites any values manually entered directly into the Projection column.

6. Review the values populated in the Fall or Spring Projections column and adjust as needed using the outline below.
Enter or Adjust Projections

1. To input values directly into the Projections column or make adjustments to populated values, enter amounts in the white, editable fields under the *Fall or Spring Projections* column.

2. Click in the input field and use the Calculator Drop-down to assist with entering values as needed.

3. Periodically, and certainly before exiting the layout, click the **Save** button to save the revised data (see Saving and Exiting Projections).
Create a New Line

Note: The Create New Line function varies slightly depending on if data was loaded via Selection by Package or Selection by BFR. Both set of steps are included in the section with Selection by Package first and then Selection by BFR.

Create New Line for Data Loaded via Selection by Package

1. To create a new or additional line for a Fund and Commitment Item (G/L Account) combination and enter a Projection amount, click on the Create New Line button.

In the resulting Create New Line window (Selection by Package):

2. In the Fund field, either type in the seven-digit fund for the new item or use the Drop-down and select the fund from the resulting list.
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3. In the **Cmmt Itm (G/L Acct)** field, either type in the **six-digit Commitment Item** or use the **Drop-down** and select the item from the resulting list.

4. In the Fall or Spring Projection field:
   - Enter **either** the amount of the new line item or use the **Calculator Drop-down**, which functions as a calculator
   - Once the amount is entered in the field, press **Enter** to verify all input fields at once and activate the **OK** button if all are valid and the G/L does not require an offset (see next step).

5. If a Commitment Item (G/L Account) is used that needs an appropriation Transfer/Offset, press **Enter** per the step above to enable the Transfer/Offset field and enter the offsetting cost object / fund.

6. Click **OK** (skip next two pages on how to Create New Line if data loaded via Selection by BFR).
Create New Line for Data Loaded via Selection by BFR

1. To create a new or additional line for a Fund and Commitment Item (G/L Account) combination and enter a Projection amount, click on the **Create New Line** button.

In the resulting **Create New Line** window (Selection by BFR):

2. REQUIRED: In the Budget Package field, either type the package number if known and press **Enter** to activate the Fund field OR use the **Drop-down** button if not known and select (pressing Enter is not needed).
3. In the **Fund** field, either type in the **seven-digit fund** for the new item or use the [Drop-down](#) and select the fund from the resulting list.

4. In the **Cmmt Itm (G/L Acct)** field, either type in the **six-digit Commitment Item** or use the [Drop-down](#) and select the item from the resulting list.

5. In the Fall or Spring Projection field:
   - Enter either the amount of the new line item or use the [Calculator Drop-down](#), which functions as a calculator.
   - Once the amount is entered in the field, press **Enter** to edit all input fields at once and activate the **OK** button if all are valid and the G/L does not require an offset (see next step).

6. If a Commitment Item (G/L Account) is used that needs an appropriation Transfer/Offset, press **Enter** per the step above to enable the Transfer/Offset field and enter the offsetting cost object / fund.

7. Click **OK**.
Once the new line is created (applies to both Selection by Package and by BFR):

1. Review the new line item and verify the following:
   - If a new Fund and Commitment Item (G/L Account) combination was added, the number in the Line Item (LI) column shows 1.
   - If an existing Fund and Commitment Item (G/L Account) combination was added, the Line Item (LI) column shows 2, 3, etc.
   - The added line item displays the Fall or Spring Projection amount.

2. Periodically, and certainly before exiting the layout, click the Save button to save the revised data (see Saving and Exiting Projections).
Use Units and Rates to Enter a Projection

1. To input a projection using a number of units multiplied by a rate, select a row if needed and click on the **Units and Rates** button.

2. In the resulting Units and Rates screen, enter the desired Unit A and Rate A.

3. If needed, use the **Add** button to add additional line items to continue to budget by units and rates, as shown above.

4. Click the **Calc** button to calculate the multiplication as needed.

5. Click **OK** to enter the projection into the layout.
6. Verify that the system performed the calculation and placed the result in the Projection column.

7. Periodically, and certainly before exiting the layout, click the **Save** button to save the revised data (see Saving and Exiting Projections).
1. Click the Filter Transfer/Offset button to filter and display any G/L Account lines requiring Transfer/Offset data.

2. Review the Transfer/Offset column now displayed and note any rows with no offset listed in this column as indicated with a # symbol.

3. Click on the selection box for the line item of the transfer/offset that you wish to update (selecting row will activate the Change Transfer Offset button).

4. Click on the Change Transfer/Offset button (this button is active only when data is filtered using the Filter Transfers/Offsets button and a row containing projection dollars is selected).
5. In the resulting box, enter the fund code for the other side of the transfer or offset for budget purposes in the Transfer/Offset field.

6. Verify or edit the amount in the Projection field.

7. Click OK.

8. Review the transfer/offset displayed in the row for the line selected.

9. IMPORTANT: Before saving, you must click on the Filter Transfer/Offset button again to remove the filter and display all the loaded data (see message example above).

10. Periodically, and certainly before exiting the layout, click the Save button to save the revised data (see Saving and Exiting Projections).
Saving and Exiting Projections

1. Once projections are revised, as often as needed, click the **Save** button (top left of screen) to ensure updates are saved.

   ![Save button](image1)

2. Be sure to close the layout with the **Close** icon in the upper right corner of the web page to ensure you do not lock the data.

   ![Close icon](image2)

   **Note:** Look for the “Closing sessions…” window in the upper right of your desktop which verifies you are closing correctly and won’t lock yourself from the data. Closing improperly by clicking out of window and opening another Budget Tool layout will lock the data for a 30 minute window.