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**.