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 Inflated 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.
3. In the **Cmmt Ite (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).
Fall and Spring Projections (cont.)

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).
### Change Transfers / Offsets

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).