Access the Projection and Reporting Tool

To access the Projection and Reporting Tool:

1. Open the web browser (all common web browsers are supported) and enter the URL of http://work.duke.edu to go to the Duke@WORK web site.

2. In the resulting Duke University NetID Services screen, enter your NetID and password.

3. Click on the Enter button to proceed to the Duke@WORK web site (see below).

   Note: Be sure to allow pop-up windows from this website (work.duke.edu) in your web browser. Check with your LAN Administrator / computer support person for steps on how to allow pop-up windows on your internet browser as we use many different browsers across Duke. For example, in Internet Explorer, use the path Tools > Pop-up Blocker > Pop-up Blocker Settings.

4. On the Duke@WORK screen, click on and select the Grants Management tab.
Accessing the Projection Tool (cont.)

Under the Grants Management tab:

5. Click on the **Projection and Reporting Tool** link.
6. Review the options available, as briefly outlined below:

- **Modify Project Tool Dates** – allows you to modify the Grant Year and Project End Dates for Projection purposes only – dates may be modified to project out up to twelve additional months.

- **Non-Salary Projection Calculation** – allows you to populate the Non-Salary projection data for selected cost categories.

- **Aggregate Summary Report** – provides a summary projection based on the selections, and may be selected by the Duke Unique ID (DUID) for a Principal Investigator (PI).

- **Aggregate Summary Parent Rollup Report** – provides a summary projection based on the selections, and may be selected by the Parent Code or Duke Unique ID (DUID) for a Principal Investigator (PI) to see all Parent Codes.

- **Single Fund Code Detail Projection Report** – provides a detailed projection report based on the single fund (cost object) selected.

- **Effort Gap – Individual Effort Report** – provides a report of employee effort by fund (cost object) based on the individual employee selected.

- **Effort Gap – PI Projects Report** – provides a report of employee effort by fund (cost object) based on the Principal Investigator selected.

- **Effort Gap – BFR Report** – provides a report of employee effort by fund (cost object) based on the BFR Code selected.
Accessing the Projection Tool (cont.)

- **Business Manager - Aggregate Summary** – provides a summary projection based on the selections, and may be selected by the BFR Code (Org. Unit) and further limited by the Duke Unique ID (DUID) for a Principal Investigator (PI).

- **Business Manager – Detail Report** – provides a detailed projection report based on the single fund (cost object) selected.

7. To select a report, simply **click once on the underlined report title**.

8. Notice that the path taken to reach the report is listed at the top of the screen below the tabs and the links may be used to navigate to previous screens.

   Note: **Each report is outlined in this Guide, including the selections available, data displayed, drill-down options, and other advanced functions available.**