Non-Salary Projection Calculation

Note: The Non-Salary Projection Calculation applies a projection of up to a 12 month average to the funds selected in the tool. If a fund has less than 12 months remaining, then the monthly average matches the remaining months (e.g. fund is only around for 3 months, then a 3 month average is used for projections).

1. Follow the path via the Portal: Grants Management → Projection and Reporting Tool → Non-Salary Projection Calculation (see Access the Projection and Reporting Tool section of the Guide).

2. Use one of the following fields to enter the selection (may choose by and use Principal Investigator or Fund Code):
   - Enter the Duke Unique ID (DUID) of the Principal Investigator (PI) or Co-PI in the Principal Investigator field or use the Advanced Options button to populate several PI values as needed.
   - Enter a seven digit cost object in the Fund Code field in place of the Principal Investigator or use the Advanced Options button to populate several cost object / fund code values as needed.
3. Select the Non-Salary expenses that need to be projected as follows:
   - Click in the check box to select the types of Non-Salary expenses that should be projected *(select as many as needed)*
   - OR
   - Use the Select All button (probably won’t use this button as selecting equipment and some other categories may not make sense for projections).

4. Use the Check button to verify the data entered and the Reset button to clear fields as needed.

5. Click on the Execute to calculate the projections.

6. Review the resulting Non-Salary Projection Calculation window which displays a message for each fund code selected to indicate that projections were set (based on the selection of the projections by Principal Investigator or by Single Fund Code).

   *Note:* The projections calculated for non-salary expense do NOT carry over each month (this calculation needs to be done each month). The adjustments made to the projections will remain (do carry over) each month until manually changed.

7. Click on the Back to Selection button to return to the previous screen.

8. Repeat the steps as needed to process the projections.