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.
5. Click on the **Projection and Reporting Tool** link.

*Note:* An alternate way to navigate to the Projection and Report Tool link using the “breadcrumb” view, is to click on the **Show All Entries** button in the far right and choose the link. These tabs or breadcrumbs may be used to navigate to previous or other pages as well.
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 for Projects with a Plan for up to eighteen additional months and without a Plan for 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 subtotaled by Parent Project (and all associated Sub-codes) based on the selections, and may be selected by the Parent Code or Duke Unique ID (DUID) for a Principal Investigator (PI). Only projects with Sub-codes are displayed.

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

- **Salary Distributions for PI Projects** – provides a summarized report for employee effort on a cost object for the selected Principal Investigator (PI) and mirrors the Push Report that a PI receives for salary distribution analysis.

*Continued on the next page.*
Accessing the Projection Tool (cont.)

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

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

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

- **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.

- **Projection and Reporting Tool Guide** – provides a link to this detailed guide to reference right from the tool.

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

   **Note:** The Detailed Navigation Panel on the left margin of the screen may also be used to navigate if desired. This panel may also be turned on or off using the white triangle button to maximize the right side of the screen as needed. **Each report is outlined in this Guide**, including the selections available, data displayed, drill-down options, and other advanced functions available.