Non-Salary Projection Calculation

Note: The Non-Salary Projection Calculation applies a projection of up to a 12-month average to the fund(s) and G/L Account category / categories 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):
   - To choose all cost objects associated with a PI, 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.
   - To choose one or more cost objects, 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 and
   G/L Account category / categories checked).

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

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

8. Repeat the steps as needed to process the projections of non-salary expense.

   Note: Once the projections are calculated and set using this tool, to
   undo the projections during that same month, you must use
   the tool again and select the fund or PI, then leave the boxes
   for the G/L Account categories unchecked and execute. This
   eliminates the projections calculated and applied earlier.