



Financial Projection Tool

First Time: Four Basic Steps



1. Create PTA Set

*PTA Sets ->
New PTA Set*

2. Choose Projection Method

*Projections ->
Select PTA Set ->
Select Project To Period ->
New Projection*

3. Make Adjustments

*Select PTA ->
Adj Cost or Salary or Budget*

4. Run Reports

*Reports ->
Select PTA Set ->
Select Project To Period ->
Select Report ->
Select Projection Version ->
Run Report*



Second Time: Three Quick Steps



1. **Modify PTA Set**
Add or Delete PTAs

Create/Update PTA Set > Update PTA Set

PTAs in PTA Set - Pauling Lab

< Previous Save

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<input type="checkbox"/>	Edit	Project-Task	Award	Award Manager
<input type="checkbox"/>		LCP.CHMBND-1	NSF.CHMBND	Pauling, Linus C
<input type="checkbox"/>		LCP.CHMBND-2	NSF.CHMBND	Pauling, Linus C
<input type="checkbox"/>		LCP.ELECTRO-1	DOE.ELECTRO	Pauling, Linus C

2. **Modify Adjustments**
Add or Delete Adjustments

Projection > Update Projection > Summary

Projection Summary for PTA Set - Pauling Lab (Version: Standard)

< Previous Adjustments ←

3. **Run Reports**

Reports

PTA Set: Pauling Lab -> 1 projection(s)

Project To: APR-FY2014
[12 mo](#), [24 mo](#), [36 mo](#), [48 mo](#), [Max](#), [FY](#)

Reports

Home Run Report

*Select Report: PTA Summary PTA Detail Personnel Month by Month

Select Version: Standard

Include LCP.CHMBND-1-NSF.CHMB **Exclude**

TIP: For *What If* scenarios, save a copy of the projection version and make different adjustments.