



Quick Reference Card GM AIMS Projections

Process

Use this functionality to see projections by manipulating Grant budget and expenses in a safe environment that will not impact the system.

Menu Path

Portal → AIMS → GM Account Assignment Non-Faculty → Goto → Account Summary

Screen	Follow these steps
To Access the specific report	Select AIMS then select GM Account Assignment Non-Faculty .
Select the Grant	Select OK
Jump to the Account Summary Report	Right click on the Grant number select Goto Account Summary
Export the data to Excel	Click Export to Excel and choose to Save Rename and Save the file to a known file location for your projections (i.e. My Documents/Projections or on your home drive)
Launch the Projections spreadsheet	Click Projections
Download the Excel template	Choose Save and Save the AIMS_Projections_Application.xls to the same folder where you keep your projections (i.e. My Documents / Projections or on your home drive). Select Yes to overwrite it each time.
Open Excel on your computer	Open the file AIMS_Projections_Application.xls from the location where you saved it.
Import the file into the Projection Spreadsheet	Select Enable Macros , select, Begin Expand the directories + until you locate your file that was exported. Select Import File and OK once the status box is complete.
Manipulate projections	Enter values in the white columns and review the impact in the far right columns
To keep to projections for future reference	Select "File, Save As..." and give the modified Excel projection file a unique name in your designated file storage location.
End of transaction	