

Make-It-So is a standalone application which takes the work you've completed in the YBT labor plan and pushes it to Workday Costing Allocations, saving you time and effort, as well as preventing duplication and text entry errors. YBT does not process payroll allocation adjustments (PAA) in this push to Workday.

Accessing Make-It-So

- Go to the Yale portal (<https://your.yale.edu>).
- Log in to the portal with your Yale NetID and password.
- Click on Yale Budget Tool (YBT) link.
- Click the **Log in to Make-It-So** link.

Yale Budgeting Tool (YBT)

The Yale Budgeting Tool (YBT) is being rebuilt to support the new Yale Chart of Accounts (COA) and will go live during F 2017. Learn more about the [Yale Budgeting Tool change, impacts, key dates to remember, and communications sent to date.](#)

What is the Yale Budgeting Tool (YBT)?

The Yale Budgeting Tool (YBT) is Yale's financial system for budgeting, forecasting, and financial management. YBT allows users to efficiently and effectively plan, budget, monitor, manipulate a report on labor and financial planning data through a standardized interface.

Login:

- [Yale Budgeting Tool, Excel Client](#)
- [Yale Budgeting Tool, Windows Client](#)

Make It So:

- [Log in to Make It So](#)

Using Make-It-So

- Make-It-So opens to the Employee List screen. You can use the SearchFilter to look for a specific person. When doing so click on the Search button, the Enter key does not work here.
- To see detail for one employee, simply click on the employee's name. This will bring you to four detail screens.
- The **YBT Proposed Costing Allocations** screen shows the employee's information and the proposed changes to allocations at the Regular Salary and Pay Component levels. After clicking on the person, wait for the "Processing please wait messages" to complete. If the "Processing" messages do not appear, click the refresh button on your browser's URL.



User Work Submission

YBT Employee Information Default Workbook

Employee Name	Employee ID	Position ID	Job Profile Name
Abadi-Graham, Tmisha Michelle	219559	P254801	Financial Assistant 4
Abdallah, Chadi	120632	P9925	Assistant Professor
Abegão, Luis	220225	P264339	Postdoctoral Associate

Processing please wait till the status is complete current status is: YBT Proposed Costing Allocations Processing

YBT Proposed Costing Allocation Details

Employee Name: Abadi, Tmisha Michelle Employee ID: 219559 Last Paid Date: 6/20/18

Position ID: P254801

Regular Salary

Start Date: mm/dd/yyyy Modify to change the start date of the first row
 End Date: mm/dd/yyyy Modify to change the end date of the last row

Need Assistance?

If you cannot install or open YBT or Make-It-So, please call the Finance Support Center at **203.432.5394**.

For questions and issues about specific YBT functions or data:

- Email ybtsupport@yale.edu

System documentation and training materials can also be found on the **YBT home page**, as well as at <https://your.yale.edu/work-yale/training/financial-training/yale-budgeting-tool-ybt>.

- Since MIS is submitting to Workday if you are using any COA's in YBT that you would have created a manual Accounting Treatment for in Workday, the MIS submission will do this as well.

Accounting Treatment rules reminder:

- PensionCap – Ledger Account 71013
 - FacLOA – Ledger Accounts 71003, 71004, 71005
 - VA Contract Fund (VAFedIPA) – YD000377
- MIS will not submit any allocations that are scheduled to ended grants i.e., anything scheduled in the red cells in YBT.
 - When submitting labor schedules with grants MIS will end date the submission with the earliest ending grant date.
 - In order to see the **Last YBT Changed Date** reflect an update from YBT you will need to click on “Refresh” at the top of the screen otherwise this updates when you launch the application. You do not need to click on the Refresh in order to see updated allocations, they refresh on open. The **Last Makeitso Submission** updates upon submission.
 - If you have changed an allocation in YBT and have MIS already opened and in the same person's proposed allocations you cannot refresh their allocations from there. You will need to go back to the Employee screen and back into their record to see the updated schedule. Note, you do not need to click on Refresh.