



TIPS & TRICKS  
FOR YBT

# Icons, Indicators, and Colors

- Colors in YBT: The following colors are used consistently in all YBT modules:
  - Blue shading: Editable cell available for data input or modification.
  - Gray or white (no shading): Locked (not editable)
  - Red shading: Indicates a difference noted in the labor planning worksheet. If an employee's allocations are over/under 100%, it will be marked in red highlight. Note: This does not apply to splits-in employees.
  - Blue Italic text : Shortcut that will do what is described in text (example: << Add Employee to Manager & Professional section >>)
  - Blue box next to COA header in FP can be labeled or color coded to identify blocks of COA's when scrolling (for example color code box yellow for COA blocks that need to be checked).

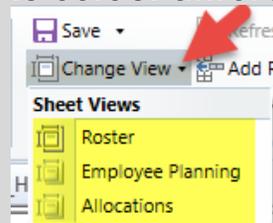


Cost Center	Grant	Gift	Yale Designated	Program	Project	Fund	Assignee
CC0077			YD000001	PG00001	PJ000001	FD01	
UUUUUG			Unrestricted	Education -	General Project	Unrestricted	
University General			Operating	Doctoral Program		Operating	
- Controller				(10)			

- LK next to an LA row in the FP means a locked row (no data entry allowed) ex: Labor data
- CL next to an LA row in the FP means Central Load Data which is budgeted revenue and expense dollars that come from central departments such as Facilities, ITS, Gift Administration (Endowments), etc. and are allocated to departments
- ME next to an LA row in the FP means manual entry
- COA! In LP means invalid COA and make sure the fringe code is manually entered when adding someone.
- INA! In an LP indicates there is an inactive segment. It does not cause a save error, but users can choose to reallocate the dollars to a different COA
- PCLA! In an LP indicates an incorrect Pay Component/Ledger Account combination (see Pay Component LA Helper tab located at the bottom of the YBT Home Page for valid combinations)

# Labor Plan Tips:

- To add a TBN or new Employee, click on the GoTo-Job Category button, then go to the one below it - ex. If you want to add an M&P, click on C&T, toggle up a few lines and you will be at the bottom of the M&P group. This is very handy with a category with many people, or you can go to the Axiom ribbon and click on "add rows".
- On a TBN be sure to select fringe code, Job Profile Name and Job Category, it does not auto-populate. Also make sure to fill in FTE % and Salary
- If a TBN position is not filled this year, you can re-add this year's TBN UPI into next year's file. This allows you to report consistently across time periods on open positions.
- YBT does not bring new employees (from outside Yale) in until after their start date. For this reason, you should use a TBN UPI
  - For Faculty and M&Ps - until after the employee has started working in your department.
  - For CT and SMs - until after the month end close following the month they started working in your department
- Red allocation % amounts indicate that a Grant has ended. You can choose to zero out these percentages and reallocate the allocations over other COA strings.
- Use the 'Change View' dropdown to select different views of the Labor Plan (the views show and hide different rows and columns).



# Labor Plan Maintenance

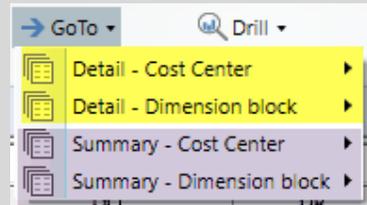
- After the plan files are built during the annual Rollover, new employees or employees that move are not brought into the plan files. They must be added manually.
- Actuals don't come into the Labor Plans. Every morning updated people data (Fringe Code, FTE % and FTE Salary) from an HR load file is brought into the labor plans in the 'Current Position Data' cells.

Current Position Data		
Fringe Code	FTE %	FTE Salary/Job Category

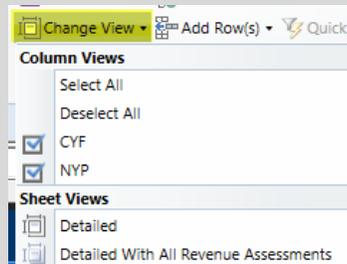
- On the last day of the month, that information for Faculty and M&Ps gets copied into the month that is closing and the formulas in the projection months carry that information forward. This process is only done on the Working Plan files. This information is not updated in cloned files.
- CT and SM employees (Hourly employees), salary information comes into the Labor Plan files differently. HR provides files containing the Start and End Rate for each employee and YBT has a process that takes that information and creates a monthly salary based on these rates and the number of days in a month. This information is updated monthly (except during the Budget cycle) in the Labor Plan (Working Plan) files. This information is never updated in cloned files.
- Terminate (leave Yale or leave your department) employees - Use the dropdown on the End Date cell to select the month/year for the person. Tip: Zero out allocations as well so the FTEs are accurate, zero \$ with an FTE is not a good thing. 😊
- Add any salary increases: Think about issues for the last six months of the year - A.) Promotion of a C&T to an M&P, B.) Job audit increases C.) Any other increases other than merit.
- Merit increases for the next year are programmed into YBT by Job Category for salaried employees. Increases currently default to July 1<sup>st</sup> If needed, you can change.
- 3.) Adjust TBN's to real people if position filled (double click on Pick UPI next to the UPI column)
- 4.) Add people who are not allocated for the full year, make sure salary is projected until the end of the year.
- 5.) Adjust any lump sums for casuals, students, etc.
- 6.) Tip: Split in Employees must be added to the Labor Plan, they do not automatically populate from the Home Employee's Cost Center. They must be manually input into the labor plan of the department getting charged the salary.
- 7.) Split in's do not have to have their allocation percentages balance to 100% for each month.
- 8.) Split out's are people whose Home Cost Center is in your you but who is charged to other units, note in column DO, it says "Split Out", these people MUST allocate 100% of their salaries. Split out amounts do not flow to other departments. Communicate to ensure that the other department adds the employee.

# Financial Plan (FP) tips

- In a small to medium sized FP, use the “Go To” dropdown to navigate to a specific COA block. NOTE: There are 2 data entry tabs in an FP - Detail and Summary. You **must pick one or the other** to do your data entry for both CY and NY (you cannot use both). The “Go To” dropdown allows navigation to both Detail and Summary tabs. Make sure that you know which tab you want to be on (for more information on using the Summary tab, please contact [ybt.support@yale.edu](mailto:ybt.support@yale.edu))



- In a medium to large FP, the “Go To” may not be a practical way to navigate. The CTRL F feature can be used to quickly get to a component of a COA in a FP. IMPORTANT NOTE: If you have more than one file open and do a CTRL F in one of them then, leaving the Find window open, click on the other file, then go back to the one where you were doing the Find and put in another thing to find, the YBT session will crash. When using ‘Find’, close the Find window if you are going back and forth between plan files and open a fresh window for the next Find.
- Changing views, will look less cluttered and leave less room for error if you are working on CYF or NYP. Tip: You can manually adjust an assessment on a gift that is in a locked cell, switch your view to “Detail with all revenue assessments”.

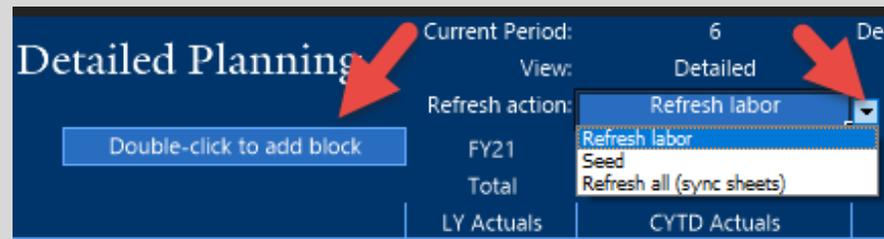


# Financial Plan (FP) tips - continued

- You can drill to person level data from the FP by double clicking on a Ledger Account in the Labor section. This action automatically opens a report that displays the employees and salary data that make up the dollars in the FP.

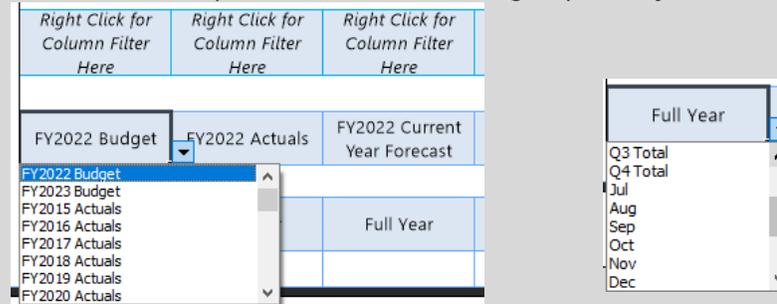
	Cost Center	Grant	Gift	Yale Designated
	CC0501			YD000259
	FASPHY Physics Research Unit			SDF Funded - Supplement - Research
<b>Labor</b>				
LK	71002	Faculty Salaries - non-ladder		
LK	71008	Postdoctoral Associate Salaries		
LK	72007	Student Compensation		
LK	72013	Student Compensation - Research Assistant		
LK	91001	Allocation Expense - Fringe Benefits		
		<i>Add Labor account for Dept Plan entry only</i>		
		Total Labor		

- Quick review on the header: Double click to add a new block, Refresh labor and seed the workbook are on the same pull-down menu.



# Reporting

- YBT tip: Refresh, refresh, refresh!! Need to refresh reports when you make a change in the labor plan or the financial plan so that you see the updated data.
- Blue cells at the top of reports from the FP are selectable options. When running reports, you can change these.



## Filter Wizard vs. Drilling

- Filter Wizard (located on the far right of reports): Use this when you know what you want to look for, examples of these:

- 5 specific projects
- 1 specific COA
- 1 funding source

FY2022 Budget	FY2022 Actuals	<p><i>For more complicated filters, insert Filter Wizard here:</i></p> <p><code>COSTCENTER.CostCenter = 'CC0001' AND PROGRAM.Program = 'PG00401'</code> (be sure to refresh)</p>
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- Drilling: Use this for variance analysis, looking for a single number
- Locating variances from the top down
- Keep drilling until you get the results you can analyze (you can drill into one dimension and then drill from the resulting tab into another dimension, or drill multiple dimensions at a time)

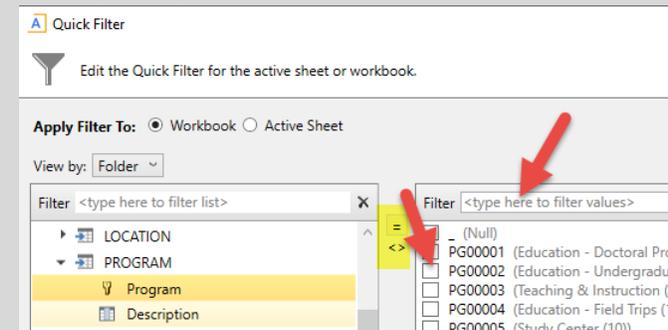
# Filter Wizard and Drilling

## FILTER WIZARD:

- The Filter Wizard can be accessed in two ways:
  - Filter Wizard box within the report (usually to the far right)
    - Right click on the filter box and select Axiom Wizards -> Filter Wizard. On pop up box, expand dimensions or employee by clicking on the arrow
  - Top header
    - click on Quick Filter (look for lightning rod). On pop up box, expand dimensions or employee by clicking on the arrow
- Expand the dimension/component you need by clicking on the arrow. Click on the thing that you want to filter on such CostCenter or AccountGrouping. Type in the filter box on the right or scroll to select the value.

## Tips for Filter Wizard:

- Note the choices between the selection boxes allow you to customize your filters (equal to, not equal to, greater than...)
- Do not be afraid to add as many filters as you need, MIX and MATCH (ie this CostCenter AND this Program...)
- Make sure "Apply" button is clicked and note that you can use "and/or" and must hit "replace" key when switching filters.
- If you want to run the report again for something different, delete the filter or exit and reopen the report. If you filtered using the Filter Wizard box, you can delete the filter there. If you filtered using the Quick Filter you must reopen the Quick Filter to delete.



# Filter Wizard and Drilling - continued

## DRILLING:

- Steps for Drilling:
- Click on the cell in the report you want to analyze (it can be a dollar amount or a variance)
- Click on the "Drill" dropdown
- You can drill into one dimension at a time (drill into one dimension and then drill from the resulting tab into another dimension), or click on Choose Columns and select multiple dimension values to drill into at the same time

