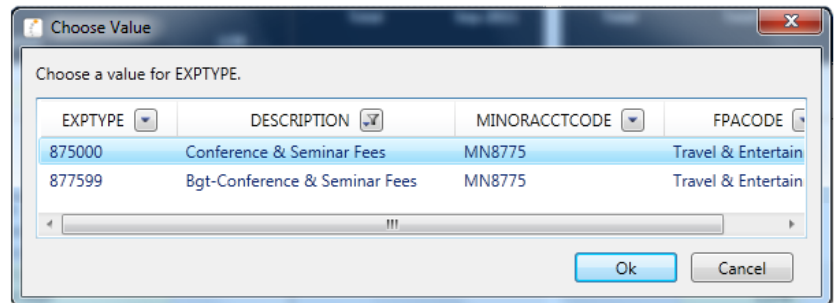
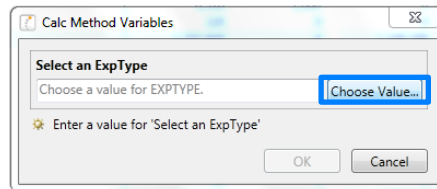
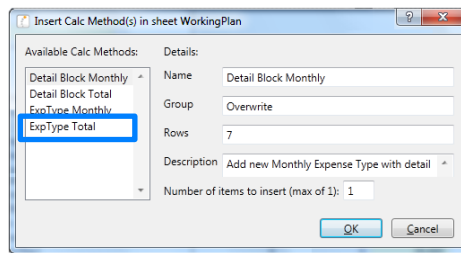
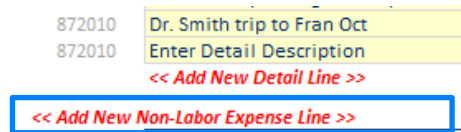


**Financial Planning - Adding a New Expense Type**

In the example below, you will add a line for conference and seminar fees (non-Labor expense type).

1. Locate the PTAO block to which you will add the new expense type.
2. Double-click **<<Add New Non-Labor Expense Line>>**. (If adding a new Revenue or Transfer line, scroll down until the relevant link appears.)
3. Choose among the available calculation methods; click **OK**.
4. Click the **Choose Value...** button to choose the expense type.
5. Choose the Expense Type Code; click **OK**.



6. Select the yellow input cell and enter the total amount for the year; press **Enter**.

247	872010	General Expense Detail (default)		22,602
248	872010	Dr Jones trip to England Sept		1,276
249	872010	Dr. Smith trip to Fran Oct		1,122
250	872010	Enter Detail Description		0
251		<< Add New Detail Line >>		
253	875000	Conference & Seminar Fees	0	5,000

7. Scroll right to look at the monthly buckets to confirm that the amount you entered is spread evenly across the unclosed months.

247	872010	General Expense Detail (default)	2,511	2,511	2,511
248	872010	Dr Jones trip to England Sept	142	142	142
249	872010	Dr. Smith trip to Fran Oct	125	125	125
250	872010	Enter Detail Description	0	0	0
251		<< Add New Detail Line >>			
253	875000	Conference & Seminar Fees	556	556	556

Note: This is valid for total method only, not monthly.

**Need Assistance?**

If you cannot install or open YBT, please call the ITS help desk at **203.432.9000**.

For questions and issues about specific YBT functions or data:

- Email [ybtsupport@yale.edu](mailto:ybtsupport@yale.edu) or
- Call the YBT help desk at **203.436.5929**

System documentation and training materials can be found on the **YBT home page**, as well as at <http://yalebiz.yale.edu/yale-budgeting-tool>.