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.

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

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 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.