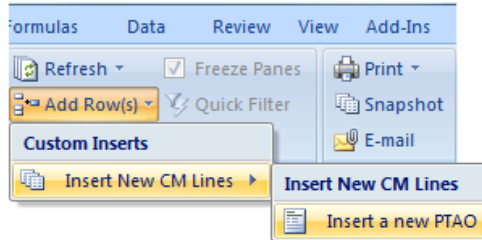


Financial Planning - Adding a New PTAO Block

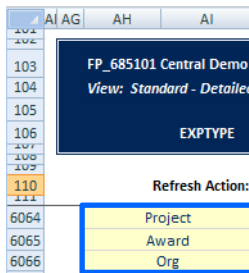
In the example below, entering a new PTAO block will help you plan for a new funding source which is about to come.

1. On the Axiom ribbon, select Add New Row(s) > Insert New CM Lines > Insert a New PTAO.

A New PTAO block is added at the bottom of the worksheet.



2. Enter the Project_Task, Award and Org.



3. Build out the various sections as needed, using the links provided in each section to add revenue, non-labor expense and transfers.

Use the PTAO block to plan expenses, revenues, and transfers.

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>.