Quick Guide
Yale Budgeting Tool (YBT)

Financial Planning - Total vs. Monthly Input

A Calc Method (CM) is a row that has been saved back to a central location for re-use. The Calc Method can contain formatting formulas and values, and needs to be adaptable for use in any relevant plan.

By default, your Financial Planning Workbook is set up for total input.
- Enter a total yearly amount in one column (yellow cell)
- The total amount is spread evenly across unclosed months

![Total amount - eligible](image)

**NOTE:** Monthly amounts are:
- Not directly editable
- Automatically adjusted when actuals hit (the unclosed months are adjusted such that the Total Amount remains unchanged)

Any row can be changed to Monthly Input; this could be useful with large one-time purchases.
- Enter amounts in specific month(s) they are expected
- Monthly amounts are summed and displayed in the Total column
- Total Column is not editable

![Total amount](image)

YBT refers to the input method (Total or Monthly) as the **Calc Method**. To **Change the Calc Method of a row**:

1. Click on the row for the ExpType you want to change.

2. Right-click to access the Add Rows menu. Click Add Rows >> Change Calc Method from the File Options section.

3. Choose the desired Calc Method (total or monthly); click **OK**.

4. Click **Yes** to confirm your decision.

---

**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
- Call the YBT help desk at **203.436.5929**

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