

## 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

AQ	AR	AI	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE
FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12
CY Forecast	Variance	CY Forecast												
Total	CYP Vs CYB	Actuals	Actuals	Actuals	Actuals	Projection								
		Jul-2011	Aug-2011	Sep-2011		Oct-2011	Nov-2011	Dec-2011	Jan-2012	Feb-2012	Mar-2012	Apr-2012	May-2012	Jun-2012
9,000	(9,000)	0	0	0		1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000

Total amount - eligible

Monthly amounts

**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

AQ	AR	AI	AT	AU	AV	AW	AX	AY	AZ	BA	BB	BC	BD	BE
FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12	FY12
CY Forecast	Variance	CY Forecast												
Total	CYP Vs CYB	Actuals	Actuals	Actuals	Actuals	Projection								
		Jul-2011	Aug-2011	Sep-2011		Oct-2011	Nov-2011	Dec-2011	Jan-2012	Feb-2012	Mar-2012	Apr-2012	May-2012	Jun-2012
9,000	(9,000)	0	0	0		1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000

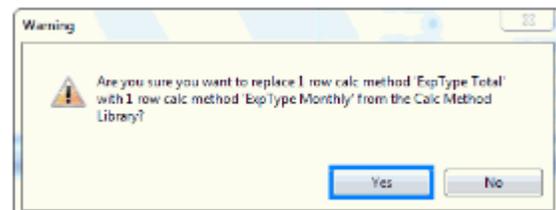
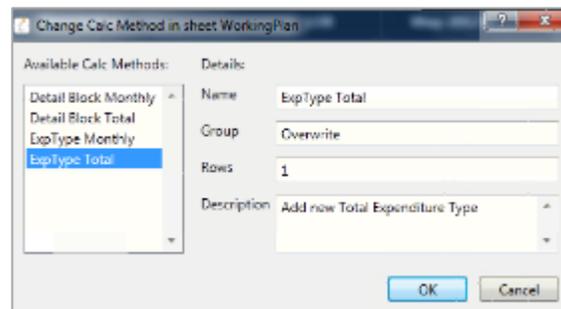
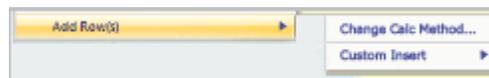
Total amount

Monthly amounts - editable

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.

215	Non-Labor Expense			
216	813000 Tuition Discount	592,376	1,454,792	0
217	820610 Equipment - Computers < cap amt	0	0	9,000
218	0300000 Conf. R. Expenses	0	0	0



### 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 also be found on the **YBT home page**, as well as at <http://yalebiz.yale.edu/yale-budgeting-tool>.