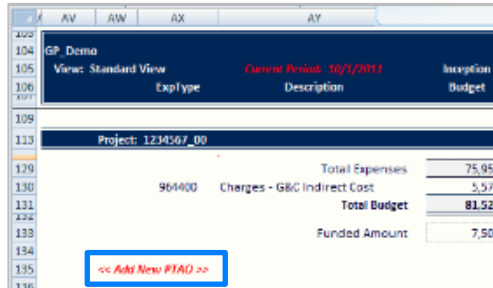
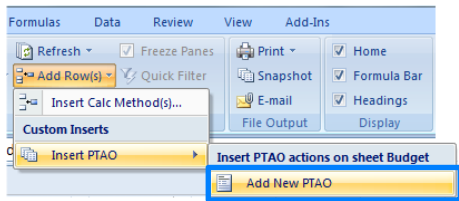


Grant Planning: Adding a New PTAO

In the example below, a new PTAO block is added to your plan so you can budget for a newly received grant.

1. Double click the **<< Add New PTAO >>** link. Alternatively, you can click as follows on the Axiom tab: **Add Row(s) >> Insert PTAO >> Add New PTAO.**

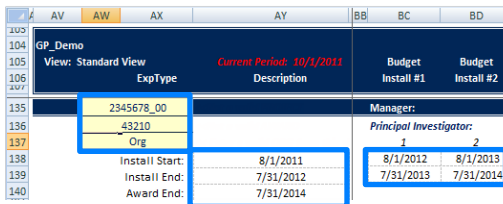


The new PTAO block displays.

2. Type the Project_Task in the **Project** cell, and type the award in the **Award** cell.

Press **Enter**. Notice that data automatically appears in these fields:

- Install Start
- Install End
- Award End
- Start and end dates of installment periods

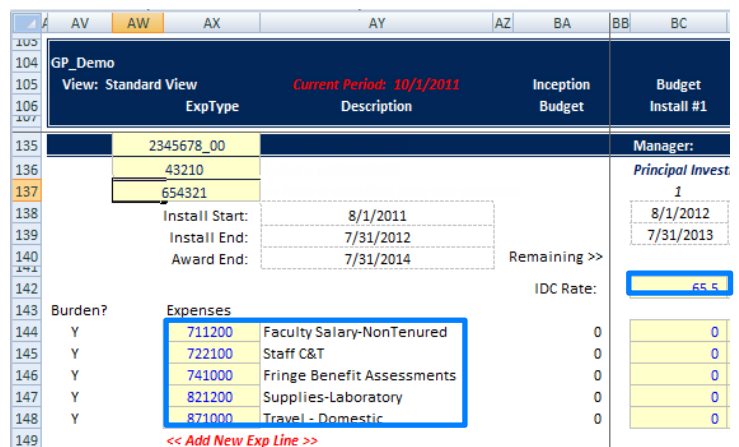
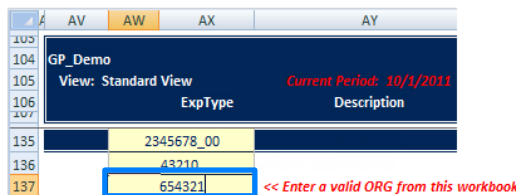


3. Type the Org in the **Org** cell; press **Enter**.

4. Type in the **IDC Rate**; press **Enter**.

Notice that five expense type codes and their descriptions are initially included in the PTAO block.

You can use the lines provided or add new expense lines and amounts as appropriate.



5. There are five default expense types provided. Budget to these expense types, or:

- To add new expense types, click the **<< Add New Exp Line >>** link and indicate the number of new lines in the dialog box, then enter the expense code or **<<Double click to select the ExpType>>** to search from the ET number.
- When you add a new PTAO block, you can **overwrite** the default expense lines because they have no budget/commitments attached to them.

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