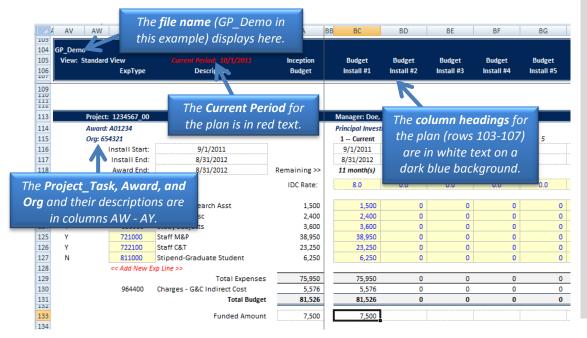


Grant Planning Overview

Opening Your Grant Plan

- 1. Click the Grant Planning button on the Axiom ribbon.
- 2. Click GP Working Plan.
- 3. Select from the plans available to you. The Grant Planning module opens, dispaying the plan you selected. All of the grants which belong to this org will be included in the plan.



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 <u>ybtsupport@yale.edu</u> 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/yalebudgeting-tool.

Columns on the GP Working Plan

| Column | Name | Description | Comment(s) |
|--------|-----------------------------|---|--|
| AV | Burden? | Indicates whether burden is associated with the expense type | |
| AX | ЕхрТуре | Expense Type | |
| AY | Description | Description of expense type | |
| ВА | Inception Budget | Inception-To-Date Budget | Sum of installments up to the current installment; does not include future installments. |
| BC-BL | Budget Installments | Budget for installments 1- 10 | Enter budgets as applicable in these columns. |
| BN | Month Actuals | The most recent monthly actuals | |
| ВО | YTD Actuals | The most recent year-to- date actuals | |
| BP | DWH Non-Labor Commits | Non-labor commitments from the data warehouse | |
| BQ | Current Month Projection | Projections sent to data warehouse for the current open month | |
| BR | Future Projection | Projections sent to data warehouse for future months | |



Several fields are automatically populated based on the award entered. These include:

- install start and end date
- award end date
- installment period
- manager
- principal investigator
- IDC rate

Of these, IDC rate field is the only editable field.

| Column | Name | Description | Comment(s) |
|--------|---------------------|----------------------------|------------------------------|
| BU-CD | Burden Installments | Burden for installments 1- | Calculated for each |
| | | 10 | ExpType which requires |
| | | | burden, based on the |
| | | | Indirect Cost (IDC) rate for |
| | | | the installment period. |
| CF | CYGC Total | Grants & contracts total | Also referred to as the |
| | | for the current year | "Fiscal Year Slice." |
| CG | NYCG Total | Grants & contracts total | Also referred to as the |
| | | for next year | "Fiscal Year Slice." |

GC Indirect Cost

- 1. The overhead expense type code 964400 (Charges-G&C Indirect Cost) will calculate based on the award's actual indirect (overhead) rate.
 - Column AV indicates whether or not the ExpType in that row is charged overhead.
 - Use GB Overhead ExpType 964499 to correct for adjustments to the indirect totals.
- 2. Enter the correction as either a positive or negative number in the yellow cell. (You may do "Excel Math" in the cell to arrive at your correction) The amounts will roll up on your reports to one Overhead line item.
- 3. IDC rates for each installment of an award can be changed by the user. The award's current IDC rate will appear in IDC Rate row. Use the yellow cells to enter any changes to change the IDC rates.

YBT Projections

Projections can be entered manually in your grant budget to appear as YBT projections in DWH reports. Oracle non-Labor commitments appear in Column BP as a reference only. You can enter current month projections in column BQ and future projections in column BR for projections to appear correctly in Account Holder reports. You can use Excel math to make these projections dynamic, so that future projections decrease as the year progresses. Data warehouse reports pull labor projections from your labor plan. Do not enter labor projections in Columns BQ and BR.

Note: You cannot delete a PTAEO block. If necessary, just zero out the plan. To remove a block, contact your YBT System Administrator.