

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, displaying the plan you selected. All of the grants which belong to this org will be included in the plan.

The file name (GP_Demo in this example) displays here.

The Current Period for the plan is in red text.

The column headings for the plan (rows 103-107) are in white text on a dark blue background.

The Project_Task, Award, and Org and their descriptions are in columns AW - AY.

The screenshot shows a spreadsheet-like interface with columns labeled AV through BG. Row 103 is highlighted in dark blue with white text for column headers: 'View: Standard View', 'Current Period: 10/1/2011', 'Inception Budget', 'Budget Install #1', 'Budget Install #2', 'Budget Install #3', 'Budget Install #4', and 'Budget Install #5'. Below this, there are fields for Project (1234567_00), Award (A01234), and Org (654321). A table of budget installments follows, with columns for month and budget amounts. A summary table at the bottom shows Total Expenses (75,950), Total Budget (81,526), and Funded Amount (7,500).

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>.

Columns on the GP Working Plan

Column	Name	Description	Comment(s)
AV	Burden?	Indicates whether burden is associated with the expense type	
AX	ExpType	Expense Type	
AY	Description	Description of expense type	
BA	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	
BO	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	

YBT Tip

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 1-10	Calculated for each ExpType which requires burden, based on the Indirect Cost (IDC) rate for the installment period.
CF	CYGC Total	Grants & contracts total for the current year	Also referred to as the "Fiscal Year Slice."
CG	NYCG Total	Grants & contracts total for next year	Also referred to as the "Fiscal Year Slice."

GC Indirect Cost

- 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.
- 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.
- 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 PTAEAO block. If necessary, just zero out the plan. To remove a block, contact your YBT System Administrator.