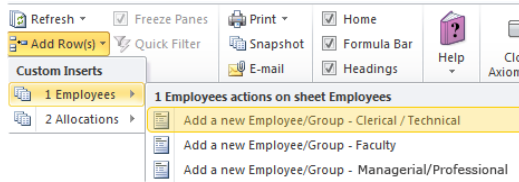


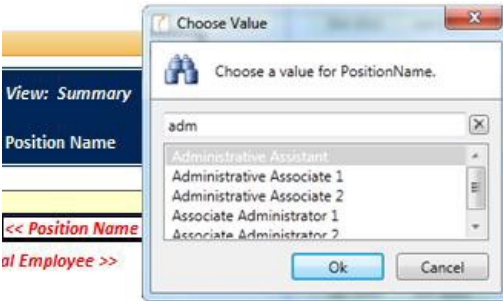
Labor Planning - Adding a New To Be Named (TBN) Position with Split Charging

In the example below, you have an approved open Clerical/Technical (C&T) position, an administrative assistant, with split charging to two Home PTAEOs allocated at 50% each.

1. Go to the Employees tab of the Labor Planning Workbook.
2. On the Axiom ribbon, select Add Row(s) >> Employees >> Add a new Employee/Group – Clerical/Technical.



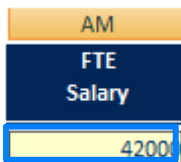
3. Choose the position name:
 - Double-click the Position Name Pick List
 - Enter a search phrase to filter the list
 - Select Administrative Assistant
 - Click OK.



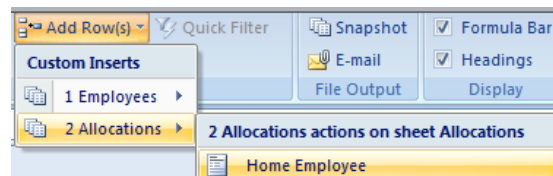
4. Select the Plan Start Date from the pull-down menu in Column AG.



5. Confirm that the fringe code (column AK) and FTE % (column AL) are correct. Tab to Column AM. Type the annual salary and press Enter.



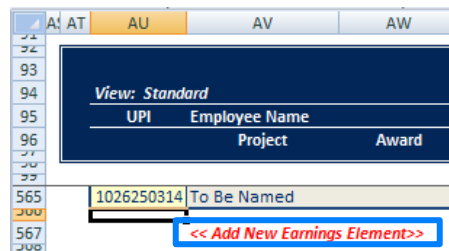
6. On the Axiom ribbon, select Add Row(s) >> Allocations >> Home Employee.



A new record displays on the Allocations tab.

7. Go to the Employees tab and click on the UPI column of the newly added record. Choose Copy (Ctrl + C or Right click, Copy).
8. Go back to the Allocations Tab and use the Paste Specials Values command to enter the UPI value.
9. Double click on << Add New Earnings Element >>.

The Insert Calc Method(s) in Sheet Allocations pop-up window appears.



Need Assistance?

If you cannot install or open YBT, please call the ITS help desk at **203.432.9000**.

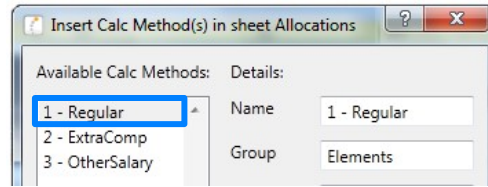
For questions and issues about specific YBT functions or data:

- 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>.

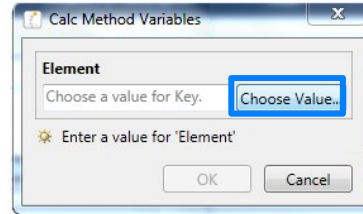
10. Select **Regular** from the list and click OK.

The Calc Method Variables pop-up window appears.



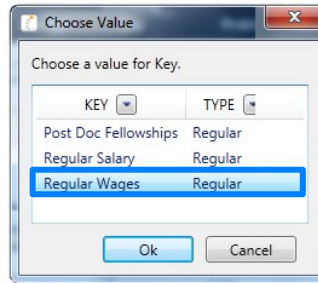
11. Click the **Choose Value...** button.

The Choose Value pop-up window appears.



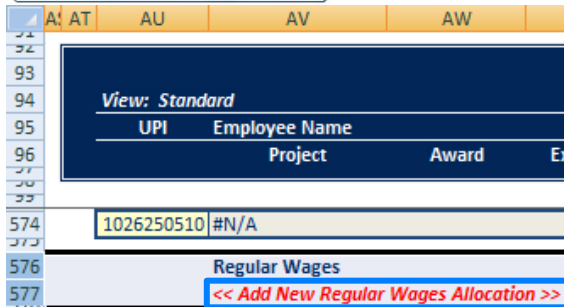
12. Select **Regular Wages**; click OK.

A regular wages block displays in the employee's record.



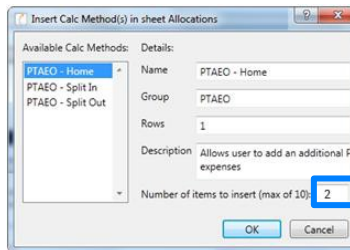
13. Double-click the **<< Add New Regular Wages Allocation>>** link.

The Insert Calc method(s) in sheet Allocations window displays.

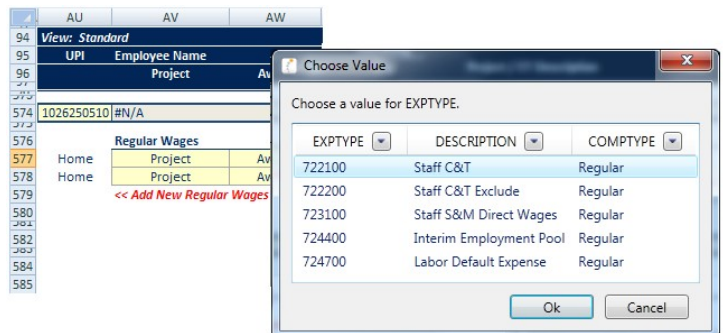


14. Choose the 2 Home PTAEOS:

- Click PTAE0 - Home
- Type '2' in the Number of items to insert (max of 10) field
- Click OK.



15. Enter the Project_Task, Award, ExpType, and Org information. To pick the ExpType from a list, use the EXPTYPE Pick List link.



16. Scroll right to the November 2013 cells and allocate each line appropriately.

	BX	BY	BZ	CA
	FY 2013	FY 2013	FY 2013	FY 2013
	NY Plan	NY Plan	NY Plan	NY Plan
	Allocation	Allocation	Allocation	Allocation
	Nov-2012	Dec-2012	Jan-2013	Feb-2013
	50.00	50.00	50.00	50.00