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 PTAEO - 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.