Labor Planning - Lump Sum Planning for Other Salary Categories

In this example, you plan to spend \$20,000 for casuals from January through June of next year. These steps also apply when lump sum planning for:

Page Lavout Formulas Data

- Staff Other
- Staff C&T Overtime
- Staff S&M Overtime
- Student Research Assistant
- Additional categories available
- 1. Go to the Allocations tab of the Labor Planning workbook and select Other Salary Categories.
 - GoTo >> Allocations >> Other Salary Categories
- 2. Enter the PTAO information in the appropriate row. (In this example, it would be the Casual Employee row.)
- 3. Enter the lump sum amount (20,000) in the appropriate fiscal period:
 - BC for CY Plan
 - BE for NY Plan (used in this example)
- 4. Enter 100% in the columns representing the months the casuals will work.
- 5. Scroll to column BF (NY Plan Salary Total) to see the entire planned salary.

	· ·	Formulas	Data Rev	iew vie	w Ad	u-1
🚽 Sav	re *	📑 Refresh	- 🔽 Freez	e Panes 🛛	🔒 Print 🔹	
I 🗐 Chi	ange view	+ ¦ater Add Rov	v(s) 🔹 🌾 Quick	Filter	🗋 Snapsh	ot
🗢 Go	To 🔻	📇 Drill 👻		6	🖳 E-mail	
a :	L Employee	s 🖡 e Option	ns		File Outpu	t
a :	2 Allocation		ations actions o	on sheet Allo	ocations	
			< 1 Home Emplo	oyees >>		
			< 2 Splits In Em	ployees >>		
		a +	< 3 Other Salary	/ Categories	>>	
	T 411		-		A.V.	
A A	T AU	AV	AW	AX	AY	AZ
52			AW	AX	AY	
93	LP_G02625	CENTRAL DEMO	AW	AX	AY	DIFFERENCE N
52		CENTRAL DEMO		AX	AY	
93 93 94 95 96	LP_G02625 View: Stan	CENTRAL DEMO		AX		DIFFERENCE N
93 94 95 96	LP_G02625 View: Stan	CENTRAL DEMO dard Employee Name			HomeOrg	DIFFERENCE N
93 94 95 96 97	LP_G02625 <u>View: Stan</u> UPI	CENTRAL DEMO dard Employee Name Project			HomeOrg	DIFFERENCE N
93 94 95 96 97 778	LP_G02625 <u>View: Stan</u> UPI	CENTRAL DEMO dard Employee Name			HomeOrg	DIFFERENCE N
93 94 95 96 96 778 778	LP_G02625 <u>View: Stan</u> UPI	CENTRAL DEMO dard Employee Name Project y Categories	Award	ЕхрТуре	HomeOrg	DIFFERENCE N
93 94 95 96 97 778	LP_G02625 View: Stan UPI Other Salar	CENTRAL DEMO dard Employee Name Project			HomeOrg Org	DIFFERENCE N Link Project / ET Descri
93 93 94 95 96 97 95 97 778 779 780	LP_G02625 View: Stan UPI Other Salar	CENTRAL DEMO dard Employee Name Project y Categories 0000_99	Award	ЕхрТуре 724600	HomeOrg Org 999	DIFFERENCE N Link Project / ET Descri Staff-Other
93 94 95 96 95 97 778 779 780 781	LP_G02625 View: Stan UPI Other Salar OtherSal	CENTRAL DEMO dard Employee Name Project y Categories 0000_99 0000_99	Award 0000DEF 0000DEF	ЕхрТуре 724600 722300	HomeOrg Org 999 999	DIFFERENCE N Link Project / ET Descrij Staff-Other Staff-Other Staff C&T Overtime
92 93 94 95 96 96 97 96 97 97 80 779 780 781 782	LP_G02625 View: Stan UPI Other Salar Other Sal Other Sal Other Sal Other Sal	CENTRAL DEMO dard Employee Name Project y Categories 0000_99 0000_99	Award 0000DEF 0000DEF 0000DEF 0000DEF 0000DEF 0000DEF	ExpType 724600 722300 723300	HomeOrg Org 999 999 999	DIFFERENCE N Link Project / ET Descri Staff-Other Staff C&T Overtime Staff C&T Overtime

BE

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

FY 2013 NY Plan FTE Total				
Enter Lump Sum				
20,000 BZ	CA	СВ	сс	CD
FY 2013	FY 2013	FY 2013	FY 2013	FY 2013
NY Plan	NY Plan	NY Plan	NY Plan	NY Plan
Allocation	Allocation	Allocation	Allocation	Allocation
Jan-2013	Feb-2013	Mar-2013	Apr-2013	May-2013
0.00	0.00	0.00	0.00	0.00
100.00	100.00	100.00	100.00	100.00
BE	BF			

FY 2013	FY 2013
NY Plan	NY Plan
FTE	Salary
Total	Total

NYP Total

