

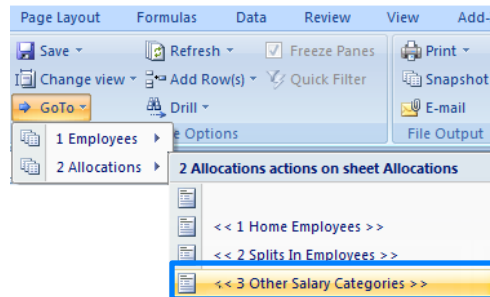
## Labor Planning - Lump Sum Planning for Other Salary Categories

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:

- 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.)

UPI	Employee Name	Project	Award	ExpType	HomeOrg	Project / ET Description
Other Salary Categories						
OtherSal	0000_99	0000DEF	724600	999	Staff-Other	
OtherSal	0000_99	0000DEF	722300	999	Staff C&T Overtime	
OtherSal	0000_99	0000DEF	723300	999	Staff S&M Overtime	
OtherSal	0000_99	0000DEF	724200	999	Casual Employee	
OtherSal	0000_99	0000DEF	725100	999	Student Research Asst	

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)

BE
FY 2013
NY Plan
FTE
Total
Enter Lump Sum
20,000

4. Enter 100% in the columns representing the months the casuals will work.

BZ	CA	CB	CC	CD
FY 2013	FY 2013	FY 2013	FY 2013	FY 2013
NY Plan	NY Plan	NY Plan	NY Plan	NY Plan
Allocation Jan-2013	Allocation Feb-2013	Allocation Mar-2013	Allocation Apr-2013	Allocation May-2013
0.00	0.00	0.00	0.00	0.00
100.00	100.00	100.00	100.00	100.00

5. Scroll to column BF (NY Plan Salary Total) to see the entire planned salary.

BE	BF
FY 2013	FY 2013
NY Plan	NY Plan
FTE	Salary
Total	Total
Enter Lump Sum	NYP Total
0	0
0	0
0	0
20,000	20,000
0	0
20,000	20,000

### 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](mailto: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/yale-budgeting-tool>.