Quick Guide - Yale Budgeting Tool (YBT)

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.)

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.

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
- 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.