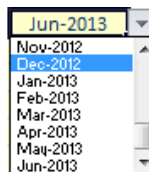


Labor Planning - Promoting a C&T to M&P

In the example below, a Clerical & Technical (C&T) employee has accepted a new Managerial & Professional (M&P) position in your department, and you would like to plan for it.

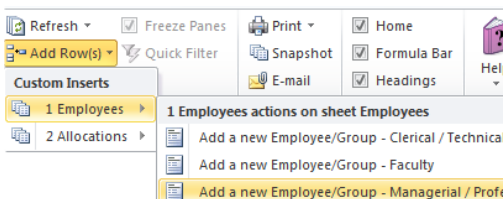
1. Go to the Employees tab of the Labor Planning Workbook. Scroll down to locate the employee being promoted.

2. Select the Plan End Date field (Column AH). Click the down arrow and indicate the last month that the employee will be a C&T.



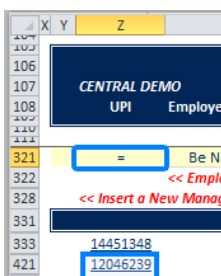
3. On the Axiom ribbon, select Add Row(s) >> Employees >> Add a new Employee/Group – Managerial/Professional.

YBT scrolls to the bottom of the M&P section and displays the new record.



4. To define the M&P employee, you need to link the employee's C&T record to the new M&P record.

- Type '=' in the UPI field of the M&P record.
- Click the UPI field of the C&T record.
- Press Enter. YBT displays the employee's name, position and ORG.



	X	Y	Z	AA	AB	AC
106	<div><div>View: Summary</div><div>CENTRAL DEMO</div><div>UPIEmployeePosition Name</div><div>HomeORG</div></div>					
107						
108						
109						
110						
111						
321	12046239	Doe, Jane		Financial Assistant 5		770003

8. Navigate to the Allocations tab to add the new earnings element (regular salary) to the employee's record.
 - Double-click the hyperlink in the UPI column of the employee's C&T record.
 - The employee's record is displayed on the Allocations tab.

108	UPI	Employee
321	12046239	Doe, Jane
322		<< Employ
328		<< Insert a New Manager
329		
331		
405	13732197	
413	12778888	
421	2046239	

9. Double-click the << Add New Earnings Element >> link. The Insert Calc Method(s) in sheet Allocations dialog window appears.

389	12046239	Regular Wages
391		Home
392		<< Add New Regular Wages Allocation >>
393		<< Add New Earnings Element >>
396		

10. Select **Regular**, and click OK. The Calc Method Variables dialog window appears.

Insert Calc Method(s) in sheet Allocations

Available Calc Methods:	Details:
1 - Regular	Name: 1 - Regular
2 - ExtraComp	Group: Elements
3 - OtherSalary	

11. Click the **Choose Value...** button. The Choose Value dialog window appears.

Calc Method Variables

Element

Choose a value for Key. **Choose Value...**

Enter a value for 'Element'

OK Cancel

12. Select the Regular Salary item, and click **OK**.

KEY	TYPE
Post Doc Fellowships	Regular
Regular Salary	Regular
Regular Wages	Regular

13. Select the type of PTAE0 (PTAE0 – Home is selected in this example) and click **OK**.

Insert Calc Method(s) in sheet Allocations

Available Calc Methods:	Details:
PTAE0 - Home	Name: PTAE0 - Home
PTAE0 - Split In	Group: PTAE0
PTAE0 - Split Out	

14. A new Regular Salary block displays. Enter the information for Project_Task, Award, ExpType and Org in the space provided.

AT	AU	AV	AW	AX	AY
93	CENTRAL DEMO				
94	View: Standard				
95	UPI	Employee Name	HomeOrg		
96		Project	Award	ExpType	Org
389	12046239				
396	Regular Salary				
397	Home	Project	Award	ExpType	Org

15. Scroll to the right to end the allocations to the old PTAE0 (C&T) and allocate the charges to the new PTAE0 (M&P) in Jan of 2013.
 - Change '100' to '0' and '0' to '100' for the relevant months.

BY	BZ	CA	CB
FY 2013	FY 2013	FY 2013	FY 2013
NY Plan	NY Plan	NY Plan	NY Plan
Allocation	Allocation	Allocation	Allocation
Dec-2012	Jan-2013	Feb-2013	Mar-2013
100.00	0.00	0.00	0.00

16. Scroll back to Columns BC - BF to verify that the allocations and salary are correct from the current year's plan to the next.

BC	BD	BE	BF
FY 2012	FY 2012	FY 2013	FY 2013
CY Plan	CY Plan	NY Plan	NY Plan
FTE Total	Salary Total	FTE Total	Salary Total
1.00	54,541	0.50	27,137
1.00	54,541	0.50	27,137
0.00	0	0.50	31,000
0.00	0	0.50	31,000