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.

5. Double-click the Position Name Pick List link to identify the new M&P position. Select the new position name and click OK.

6. To indicate when the employee will start the M&P role, click the down arrow in the Plan Start Date field (column AG) and select the month and year of the promotion.

7. Change the Job Class, Fringe Code, and Salary:
   - Type MP into column AJ.
   - Type S in Column AK.
   - Type the annual salary in Column AM.
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.

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

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

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

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

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

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

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

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.