

## Getting Started

The **Yale Budgeting Tool (YBT)** creates a common system for budgeting, forecasting, and financial management at Yale, vastly improving our labor and financial planning processes. This guide is designed to help you when using YBT for the first time.

### System Requirements

The following are required in order for YBT to operate effectively:

- Windows Operating System (XP or higher)
- Internet Explorer version 7.0 or higher
- Microsoft Excel 2007 SP2 (32-bit) or Microsoft Excel 2010 (32-bit)
- CPU: Dual core 2.0Ghz or higher
- RAM: 2GB
- 400MB available disk space

### Which Client to Use?

YBT is available in both an Excel client or a web client.

Excel client (recommended)	Web client
<ul style="list-style-type: none"> <li>▪ Has the look and feel of Microsoft Excel</li> <li>▪ Allows you to use Excel functions and features</li> <li>▪ Uses most Excel shortcuts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Faster processing</li> <li>▪ Does not provide full Excel functionality</li> </ul> <p><i>Please note: If you currently use Excel 2003 or older, you must use the YBT web client.</i></p>

### Launching YBT

1. Go to the Yale portal, <https://portal.yale.edu>.
2. Log in to the portal with your Yale NetID and password.
3. Click one of the **Yale Budgeting Tool** links in the Yale Services section:
  - YBT Excel Client
  - YBT Web Client
4. The YBT home page appears.

### Need Assistance?

If you cannot install or open YBT, please call the ITS help desk at **203.432.9000**.

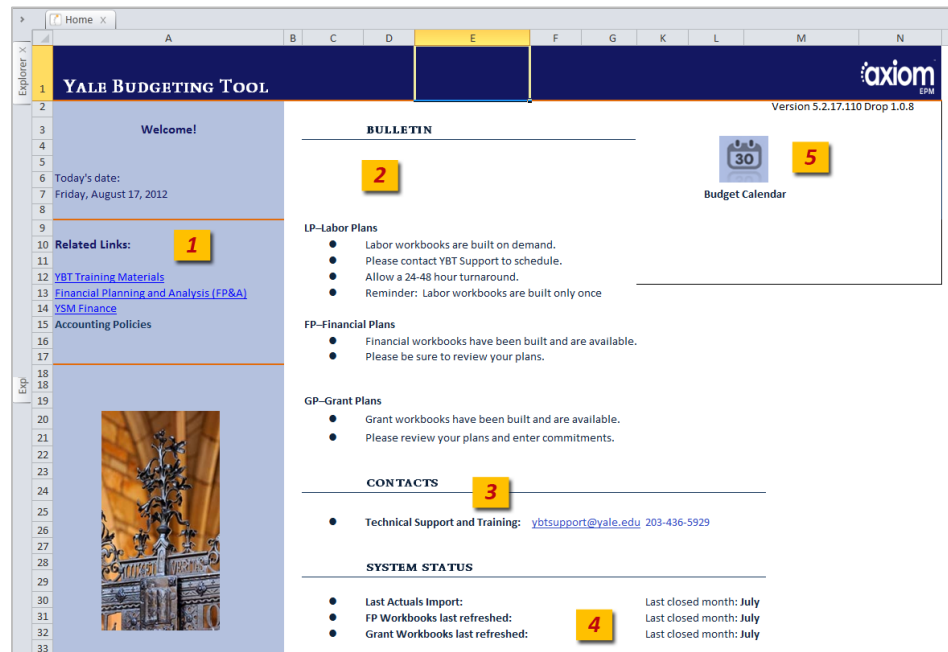
For questions and issues about specific YBT functions or data:

- 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-training-materials>.

YBT Tip

If you want to use the YBT Excel client but do not currently have Excel 2007 or 2010, you can **download it at no cost** from the ITS Software Library.



### YBT Home Page

Section	Description
<b>1</b>	Navigation area Links to training resources and related information
<b>2</b>	Bulletin Time sensitive updates
<b>3</b>	Contacts Key contacts for getting assistance
<b>4</b>	System Status Latest updates and news
<b>5</b>	Budget Calendar Due dates for planning and budgeting processes

# Labor Planning

## Employees Tab

Use the **Employees tab** to manage information about employees, including:

- Employee name
- Position
- Plan start and end dates
- FTE %
- FTE salary

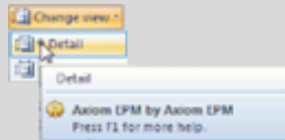
Employees listed are grouped by job class, with one block for each type of employee:

- Faculty
- Post Doctorates
- Students and Casuals
- Splits In
- Managerial & Professional (M&P)
- Clerical & Technical (C&T)
- Service & Maintenance (S&M)

You can view data on the Employees tab in two ways:

- Summary View** contains one row of data per person using the default column set (columns Z-BB).
- Detail View** contains the default column set, plus these additional columns and rows:

Columns	Rows
BG-BR	FTE percentage
BS-CD	FTE salary
CF-CG	Monthly salary
CI-CJ	Fringe code
CL	
CM	
CO	



**NOTE:** Use the **Change View** button on the Axiom ribbon to switch from Summary to Detail view.

## Allocations Tab

Use the **Allocations tab** to charge employees to specific PTAEOs as needed.

Employees are listed alphabetically, each in their own block. Each block includes the Employee's UPI, name and Home Org, as well as the PTAEOs used to pay for the employee's salary.

# Financial Planning

The **FP Working Plan** displays information about PTAOs that had activity in FY12, were budgeted to in FY13, or have actuals in FY13.

PTAEOs are displayed in blocks which display information for one PTAEO in the following rows:

- Beginning Balance
- Revenue
- Labor Expense (from Labor Plans)
- Non-Labor Expense
- Transfers
- Ending Balance

## YBT Tip

### More Helpful Tips:

- Save frequently.** Saving your work often is beneficial because if you close without saving, any changes you made will be lost.
- Use the GoTo button.** To quickly get to the bottom of a section, click the "Go To" button to avoid scrolling through the worksheet.
- Right click your mouse.** Right clicking on a cell provides many of the shortcuts available in the menu.

- Know your colors.** YBT uses the following cell colors:

**Yellow** Cell available for input

**Gray/white** Cell is not editable

**Blue** HR data has changed in Labor Plan.

**Red** "Difference noted" indicates changes made in the corresponding row

**Red text** Shortcut will do what is described in text

- Use keyboard shortcuts.** Keyboard shortcuts help you navigate more quickly and easily.

**Alt + Tab** Jump between multiple open windows

**Ctrl + Tab** Switch between open working plans or workbook windows

**Ctrl + PgDn / Ctrl + PgUp** Jump to the different worksheets within your workbook

- Paste Special.** When pasting data into YBT fields:

1. Right click on the destination cell and select Paste Special...

2. Select the Values button.

3. Click OK.