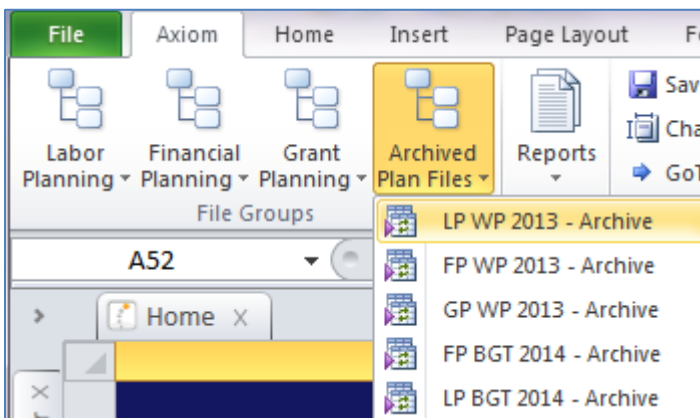


Enhancements to YBT August 2013

The following list identifies the enhancements which will be available when you log into the Yale Budgeting Tool after the morning of August 26.

General

Archived Plan Files are available on the Ribbon. A new option called Archived Plan Files is available on the ribbon. These files will be read only historical copies of last year's plan files, and will appear exactly as they were when they were last used in YBT, (including any notes etc.) View the picture below for an example.



Need Assistance?

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

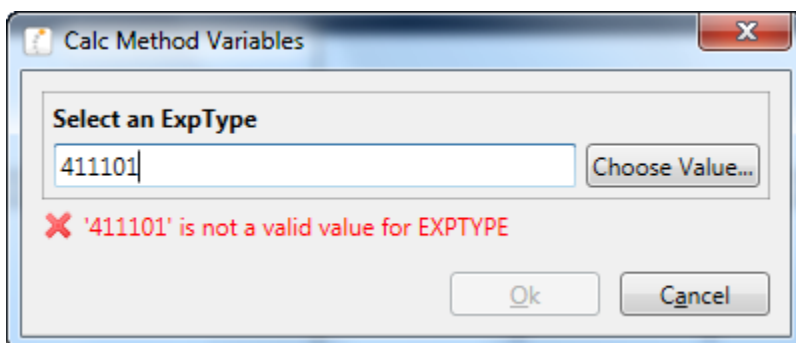
For questions and issues about specific YBT functions or data:

- Email ybtsupport@yale.edu or
- Call the YBT help desk at **203.436.5929**

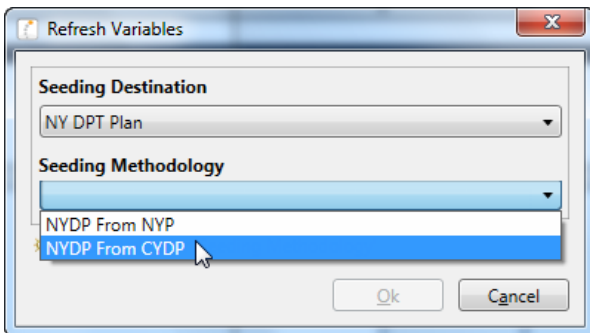
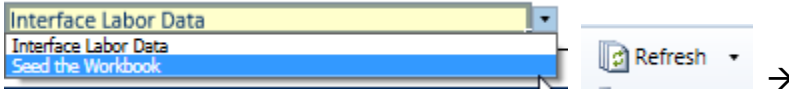
System documentation and training materials can also be found on the **YBT home page**, as well as at <http://yalebiz.yale.edu/yale-budgeting-tool>.

Financial Planning

Dynamic Calc Method – This feature prevents you from adding a duplicate ET within a ptao block. With this enhancement, you will receive an error (shown below) if you attempt to add an expenditure type code which already exists in the ptao block. In this example, we are prevented from duplicating the Tuition ET. Since (Tuition - 411101) already exists in PTAO in question, we're given the message stating 411101 is not a valid value.

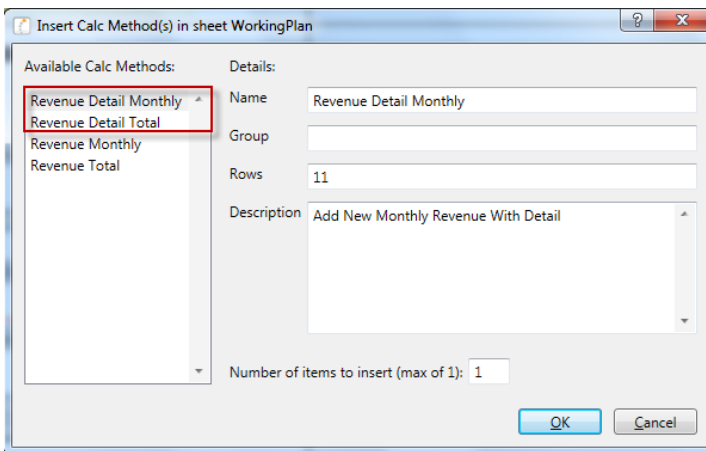


Seeding the NY DEPT plan column previously, the only seeding option available for the NY DEPT plan column was to use CY DEPT plan. Now, you have two options; you can still choose to seed using the Current Year dept. plan (CYDP) or you can choose to seed from the Next Year plan column (NYP). (As shown below.)



Completing this action would copy the contents of the CYDP column into the NYDP column.

Detail Blocks now available for Revenue Expenditure types. Double click the add new revenue line link, choose either one of the detail block options (Revenue Detail Monthly, and Revenue Detail Total.) complete the steps for the Detail block following the steps outlined in the Yale Budgeting Tool (YBT) User Manual.



The **“Last Closed Month”** value has been added as a reference in AP:AQ104. Use it when creating formulas based on the last closed month value. This value will update each month and reflects the most recently closed month (e.g. as of August 8, the Last Closed month value is 1, since July is the most recently closed month, and it is the first month in the fiscal year.

FP_ Org Dept Name			FY13	FY14
View: Standard - Detailed			LY Actuals	CYTD Actuals
EXPTYPE	Description	LOB	Total	Jul-2013
Refresh Action: Seed the Workbook				

Grant Planning

IDC Rates are no longer auto loaded based on current award Indirect Cost (IDC) rate – in the Grant Planning workbook, you will need to review and verify the IDC rate during each installment, to ensure it accurately reflects the Indirect Cost Rate for the installment in question. To assist with this task, we’ll display the current IDC rate in a cell labeled “Current” as shown below.

4/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013		
12/31/2009	12/31/2010	12/31/2011	12/31/2012	12/31/2013		
				5 month(s)		
15.0	15.0	15.0	15.0	15.0	15.0	1
Current = 45						

Labor Planning

The **Sabbatical credit calculation** is now visible in the allocations tab of YSM Labor Planning workbooks. Previously, it was only visible for central departments. It is located at the bottom of the allocations tab in the Labor Plan. The Sabbatical credit will be calculated quarterly.

Sabbatical Credit Calculation						
Total Qualified Expense for Workbook						
PTAEO	0031422_00	0001AM	741002	690101	SABBATICAL RECOVERIES 0031422	Admin

On the Employees Tab, **we removed formulae used to determine values such as Job Class and Fringe Code, for new employees added.** Previously, when adding a To Be Named employee to the employees tab, some of the values were populated using formulae. (Job Class, Fringe code). Going forward, you will need to enter the Job Class and Fringe Code values directly into the appropriate cells, manually.

New **Monthly Extra Comp Calc Method** is available – Previously, extra compensation was added to the labor plan as an annual figure. Using the Monthly Extra Comp calc method, you can enter different amounts in each month extra compensation is to be paid, starting in column CG. The total of all amounts to be paid will display in the Salary Total column (column BD)

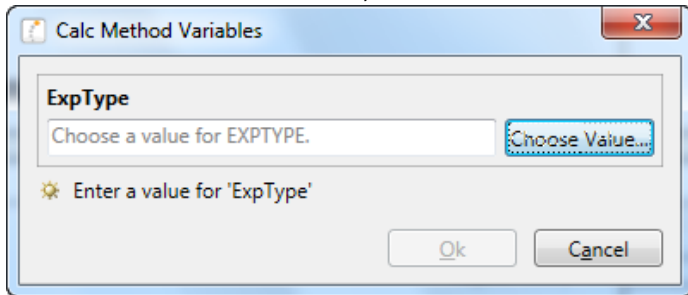
	BA	B	BC	BD	CG	CH	CI
			FY 2014	FY 2014			FY 2014
			CY Plan	CY Plan			CY Plan
			FTE	Salary			Salary
LOB			Total	Total			Salary
							Jul-2013
							Aug-2013
							Sep-2013
				8,000	5,000	0	3,000
				8,000	5,000	0	3,000
YSM FAC Incntv Total							

All Clerical/Technical and Service/Maintenance employees have the correct “base” hours assigned to their record.

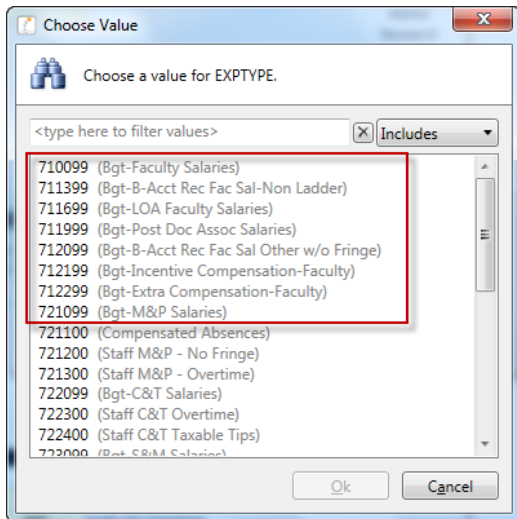
This enhancement only affects a small number of departments. Previously, some CT/SM employees who worked a non-standard number of hours per week were assumed to work the standard number of hours worked by their job class. This caused discrepancies in the projections and extra work for business office staff who work on labor plans. With the new enhancement, YBT checks the number of hours worked indicated in the HR record of the employee in question to ensure we’re projecting the correct values.

New **Budget only Expenditure Types have been added to the Other Salary Categories section** of the Allocations Tab in the Labor Plan. Near the bottom of the Allocations tab, you’ll find the Other Salary Category section, which enables you to add lump sum amounts of salary and assign it to a specific lump sum category (e.g. Staff-Other Staff C&T Overtime, Staff S&M Overtime, Casual Employee, and Student Research assistant). This allows you to add the salary of an employee without changing your FTE count.

To add one of the other salary categories, Double click on the “add new other salary category” link. Click the Choose Value button, and choose from the available expense type codes.



NOTE: using the budget only ETs will **not** account for an FTE. If you are adding a To Be Named FTE employee, you should add the new employee in the section appropriate for the job class of the new employee.



Complete adding the Other Salary Category information as described in the YBT User Manual.