POSITION WITH INCUMBENT (PWI) REPORT JOB AID

Displays details of all budgeted positions, including related Human Resources data, such as position control number, employee name, and job title

Log on to BTS

From SAP Home Page **Financials/Budget** tab, click "**SAP Budget – Schools Front End**"

1. Click on the *Reports* tab.
2. Click on *Position With Incumbent Report*.

3. Enter *Version*. Click on matchbox to display a list of available versions.
   Available Version:
   a. BP1 = Budget Development (Base allocation based on ECast)
   b. FN0 = Budget Development
   c. CM0 = Current Maintenance
4. Enter *Fiscal Year*.
5. Enter *Fund Center.*
   a. Leaving this field blank will run the report for all schools in the system.
   b. Clicking on 🔚 will allow you to enter multiple Fund Centers.
6. Select *Display in Form* to display result in PDF

   Display Options:
   a. Display in Form – Displays a formatted report in PDF
   b. Display in Grid – Allows for the report to be downloaded as a spreadsheet.
7. Click on *Execute*.

8. If the print *Output Device* is blank, type in **LOCL** and press **Enter**. Output Device should be *My win local printer*

9. Click on the **dropdown icon** [▼] on the Frontend Printer
10. Select **Doro WinGUI PDF Writer**
11. Click on **Print**
    Note: Selecting Print Preview will display the report/form and allow you to only print (not save)

12. Click **Create.** Report will open and be saved to the default location.

13. Result will display a PDF document that can be printed and/or saved.

Report Field Descriptions

1. Fund Center Description – Fund Center and Fund Center Name

2. Version:

    a. CM0 = Current Modified Version (Current Maintenance)

    b. FN0 = Adopted Final Version (Budget Development)

3. Fiscal Year

4. Position & Job

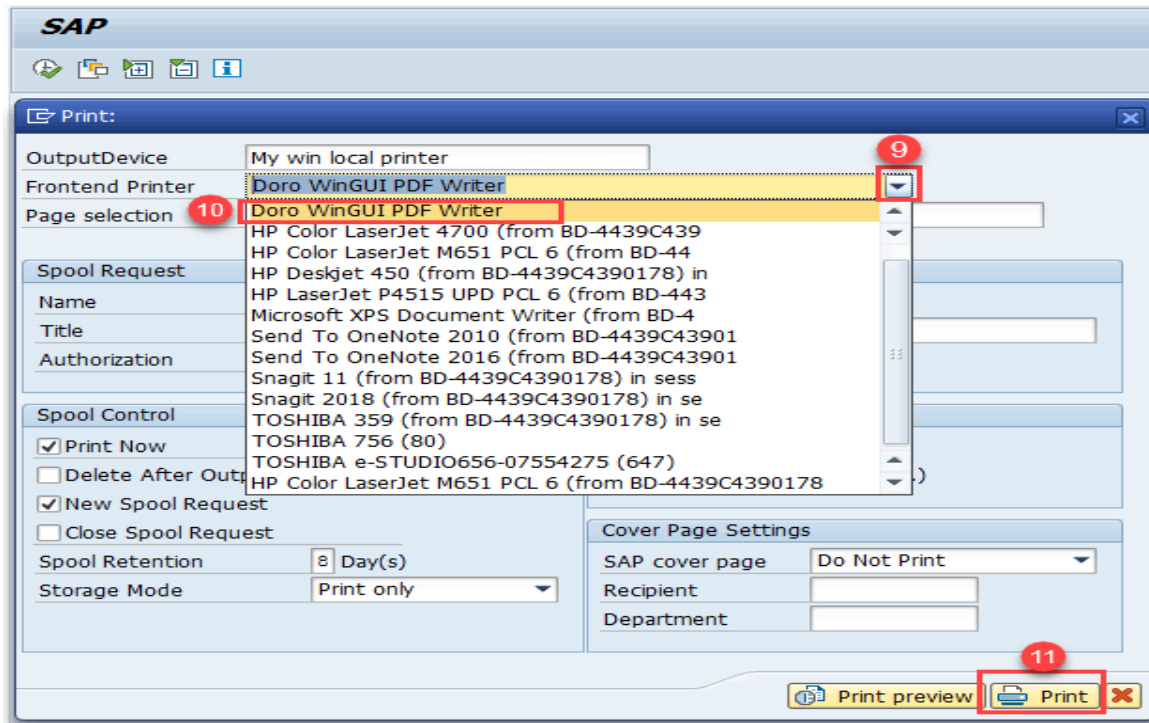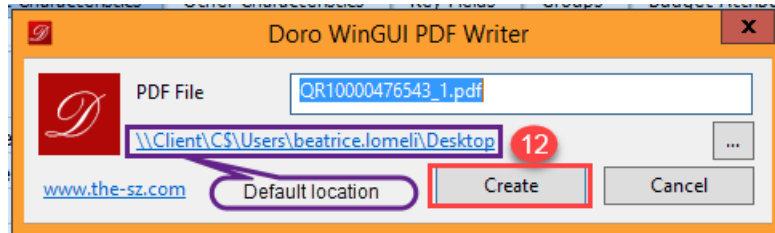   a. Position – 8 digit number that represents the position number.

    b. Job –8 digit number that identifies the job code of the position.

5. Position Description & Job Title

    a. Position Description – identifies the position name.

    b. Job Title – identifies the job name of the position.

6. PSA & Program

    a. PSA –Personnel Sub Area defines the pay basis (number of days worked per year) and track.

        i.

    b. Program – Identifies the program code used to fund the position.

7. PS Grp & PS Level

    a. PS Grp – The pay scale group is either the class code for a classified salary table or the schedule for a certificated salary table.

      b.   PS Level – The pay scale level represents the step or level from the salary table.

8. Person #/ID, Last Name, First Name, and Incumbs

      a.   Person #/ID – Person # identifies the PersNo used for the specific position number. Person ID is the employee's original employee number. An employee with multiple assignments/jobs will be assigned a different PersNo for each assignment/job.

      b.   Last Name, First Name – is the name of the employee filling the position.

      c.   Incumbs – identifies the number of incumbents in the positon.

          i.   1 of 1 = one position/one incumbent

          ii.   1 of 2 = one position/two incumbents

9. Employee Subgroup & Description - Identifies the status of employee's assignment, i.e. probationary, regular, and temporary, intern, retiree, and substitute.

10. Emp Status & Pos Status

      a.   Emp Status – is the status of the employee.

      b.   Pos Status – Position Status – is the status of the position.

          i.   Active

          ii.   Closed

          iii.   Suspend

11. Start & End – is the Start and End date of the position.

12. Hrs/Day & Days/Wk – Is the number of hours and days assigned to a position.

13. FTE & Fund %

      a.   FTE – Full Time Equivalent

          i.   Classified – 1 FTE = 8 hours

          ii.   Certificated – 1FTE = 6 hours

      b.   Fund % - is the % budgeted for a position within a program. For multi-funded positions you will have multiple lines with the same position number but different program codes and %. The percentage on a position must always total 100%.

14. Salary Amount (w/Benefits) – is the salary amount budgeted for the position based on the PS Grp/Level.