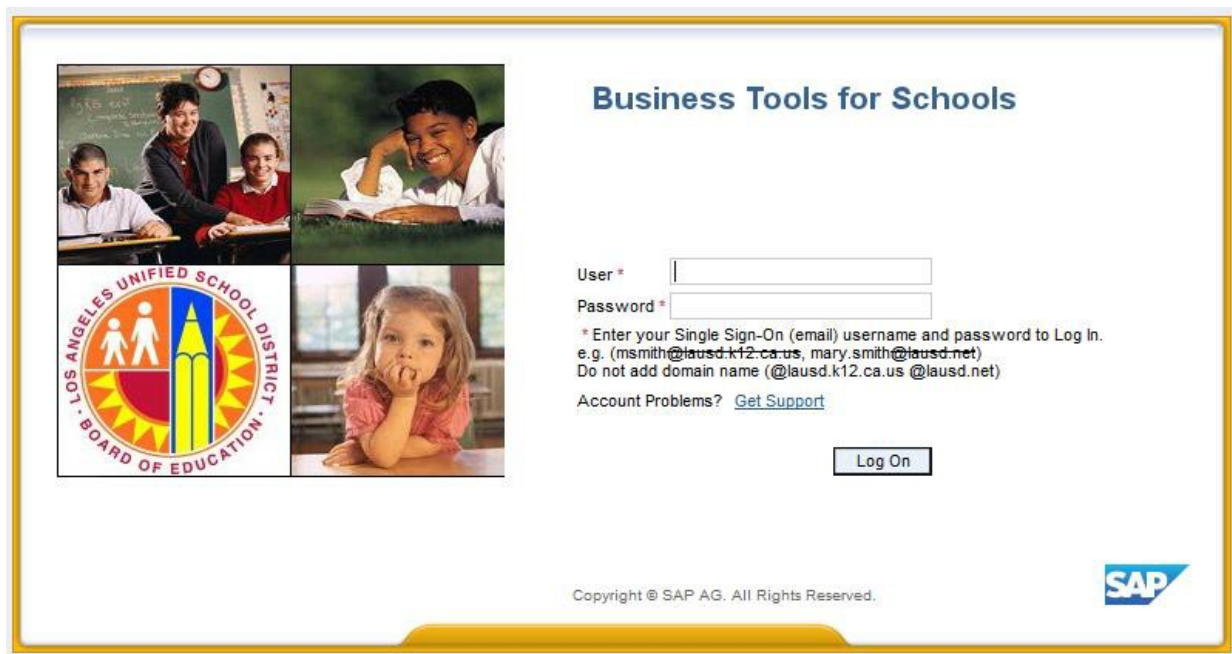


BUDGET SERVICES AND FINANCIAL PLANNING BRANCH SCHOOL FISCAL SERVICES

POSITION WITH INCUMBENT REPORT (PWI) JOB AID

This report displays the details of all budgeted positions, including related Human Resources data, such as position control number, employee name, and job title.

Log on to BTS



Business Tools for Schools


User *

Password *

* Enter your Single Sign-On (email) username and password to Log In.
e.g. (msmith@lausd.k12.ca.us, mary.smith@lausd.net)
Do not add domain name (@lausd.k12.ca.us @lausd.net)

Account Problems? [Get Support](#)

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Accessing the Report:

1. Click on the **Financials/Budget** tab,
2. Click on **SAP Budget – Schools Front End**

WinGUI Access' and 'Citrix - To access the Citrix site, Here <http://Apps.lausd.net>'." data-bbox="113 674 892 858"/>

Welcome ROBIN FOSTER

Home **Financials/Budget** Human Resources Access Request Accounts Payable Accts Recv / Cash Mgmt Controlling

Financials/Budget

SAP Financials

Detailed Navigation

- SAP Financials
- SAP Budget
- SAP Budget - Schools (version CM)
- **SAP Budget - Schools Front End**

SAP Financials

WinGUI - To access WinGUI on Citrix, Here [WinGUI Access](#)

Citrix - To access the Citrix site, Here <http://Apps.lausd.net>

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

School Budget Planning and Maintenance

School Budget Planning and Maintenance

Fund Center

SACS Fund

LAUSD Program

List All Authorized Clear Selection Criteria Save Selection Criteria


Task

	Version	Fiscal Year	Locks
Budget Planning	FNO Final Version	2020	Locked
Budget Maintenance	CMO Current Maintenance	2020	

3

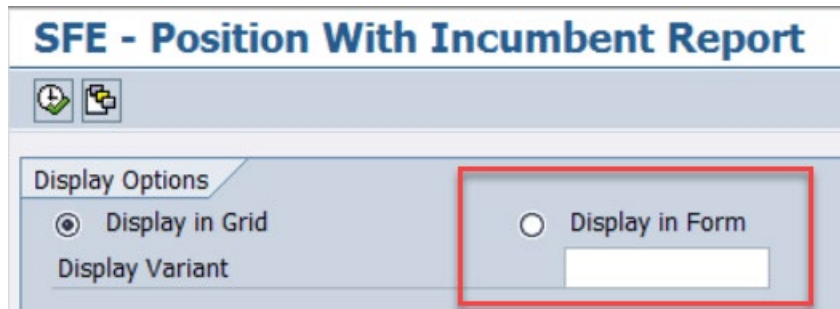
Reports Justification Administration Message

Budget Report	Archive Report	School Resource Allocation
Signature Form	Archived Signature Form	General Fund Allocation Report
Signature Form With Print Range	COFE Budget Report	Staffing and Resources
Progress Report	School Discretionary Programs Rep	School Budget Summary
4 Position With Incumbent Report	Estimated Rates By Budget Item	Cost Limits
Other Budget Reports	Employee Assignment Cost	Furlough Savings Report
RPA Form	Functional Area Derivation	

3. Click on the **Reports** tab.
4. Click on **Position With Incumbent Report**.
5. Enter **Version**.
 BP1 = Budget Development (Base allocation based on ECast)
 FN0=Budget Development
 CM0=Current Modified Budget
6. Enter **Fiscal Year**.
7. Enter **Fund Center**.
 - a. Leaving this field blank will run the report for all schools you have access to.
 - b. Clicking on  will allow you to enter multiple Fund Centers.

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

8. Select Display in Form under Display Options:



SFE - Position With Incumbent Report

Display Options

☒ Display in Grid

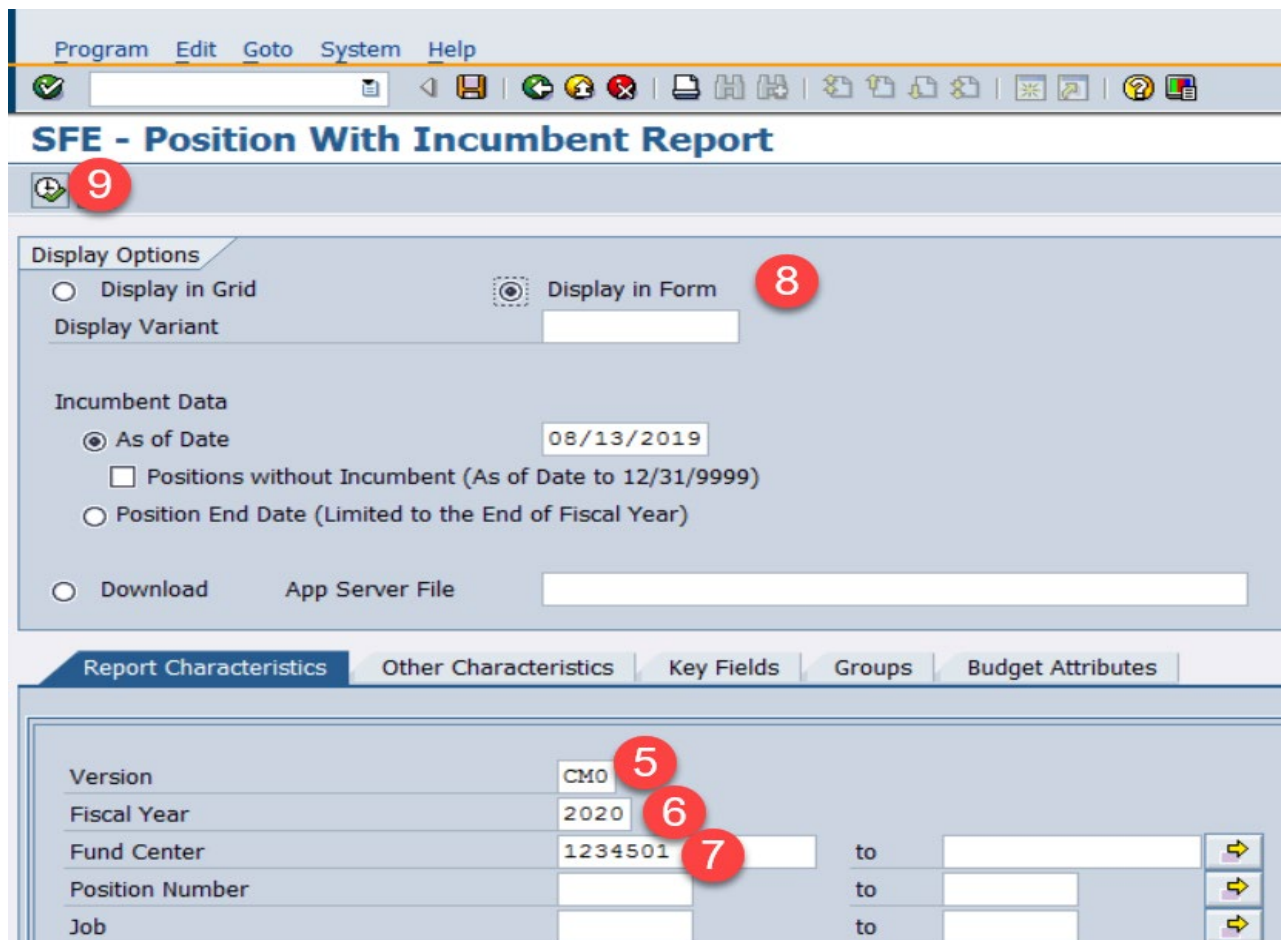
☐ Display in Form

Display Variant

Display Options:

- c. Display in Grid – Allows for the report to be downloaded as a spreadsheet.
- d. Display the Form– Displays a formatted report to print or save.

9. Click on **Execute**.



Program Edit Goto System Help

SFE - Position With Incumbent Report

Display Options

☐ Display in Grid ☒ Display in Form

Display Variant

Incumbent Data

☒ As of Date 08/13/2019

☐ Positions without Incumbent (As of Date to 12/31/9999)

☐ Position End Date (Limited to the End of Fiscal Year)

☐ Download App Server File

Report Characteristics Other Characteristics Key Fields Groups Budget Attributes

Version	CMO			
Fiscal Year	2020			
Fund Center	1234501		to	
Position Number			to	
Job			to	

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

- The print menu displays. If the Output device is blank, type **LOCL** and press **Enter**. OutputDevice will display *My win local printer*.

Print:

OutputDevice: My win local printer

Frontend Printer: HP Color LaserJet M651 PCL 6 (609)

Page selection:

Spool Request

Name: SMART LOCL RF706_1

Title:

Authorization:

Spool Control

☒ Print Now

☐ Delete After Output

☒ New Spool Request

☐ Close Spool Request

Spool Retention: 8 Day(s)

Storage Mode: Print only

Number of Copies

Number: 1

☐ Group (1-1-1,2-2-2,3-3-3,...)

Cover Page Settings

SAP cover page: Do Not Print

Recipient:

Department:

Print preview Print

- Click on the dropdown icon  on the Frontend Printer

- Select **Doro WinGUI PDF Writer**

- Click on **Print**. **Note:** Selecting Print Preview will display the report/form and allow you to only print (not save).

SAP

Print:

OutputDevice: My win local printer

Frontend Printer: Doro WinGUI PDF Writer

Page selection:

Spool Request

Name:

Title:

Authorization:

Spool Control

☒ Print Now

☐ Delete After Output

☒ New Spool Request

☐ Close Spool Request

Spool Retention: 8 Day(s)

Storage Mode: Print only

Cover Page Settings

SAP cover page: Do Not Print

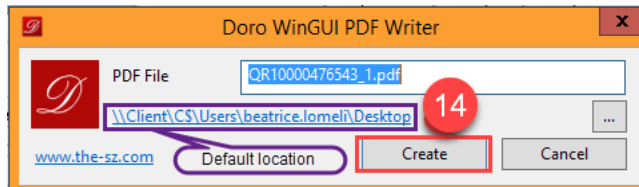
Recipient:

Department:

Print preview Print

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

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



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

Position With Incumbent

Fund Center	1234501	ABC ELEMENTARY
Version	CM0	Current Modified Version
Fiscal Year	2020	

Italics = HR Data
O = Obsolete

Position Job	Position Description Job Title	PSA Prog	PS Grp PS Level	Person # / ID Last Name, First Name	Incumb	Employee Subgroup Description	Emp Status Pos Status	Start End	Hrs/Day Days/Wk	FTE Fund %	Salary Amount (w/ Benefits)
3000XXXX	SEC TCHR-JOURN 5 TITLV 2	CSXX	26	123456 / 123456	1 of 1	R1	Active	07/01/2017	6,000	1.00	117,632.00
11100736	SECONDARY TEACHER	13027	10	DOE, JANE		Regular/Permanent	Active	12/31/9999	5,000	100.00	
3000XXXX	SEC TCHR-ALG 4 MATH 1 TITLV 1	CSXX	23	654321/654321	1 of 1	R1	Active	07/01/2017	6,000	1.00	104,957.00
11100736	SECONDARY TEACHER	13027	10	DOE, JOHN		Regular/Permanent	Active	12/31/9999	5,000	100.00	

Report Guide

Position With Incumbent

1	Fund Center	1234501	ABC ELEMENTARY
2	Version	CM0	Current Modified Version
3	Fiscal Year	2020	

Italics = HR Data
O = Obsolete

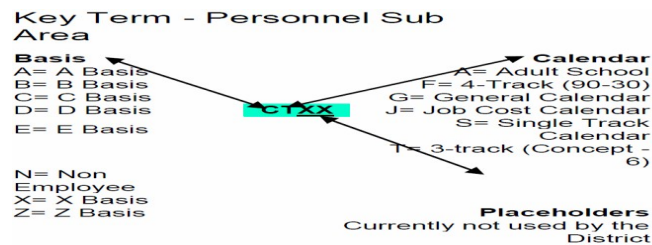
4	5	6	7	8	9	10	11	12	13	14	
Position Job	Position Description Job Title	PSA Prog	PS Grp PS Level	Person # / ID Last Name, First Name	Incumbs	Employee Subgroup Description	Emp Status Pos Status	Start End	Hrs/Day Days/Wk	FTE Fund %	Salary Amount (w/ Benefits)
3000XXXX 11100736	SEC TCHR-JOURN 5 TITLV 2 SECONDARY TEACHER	CSXX 13027	26 10	123456 / 123456 DOE, JANE	1 of 1	R1 Regular/Permanent	Active Active	07/01/2017 12/31/9999	6,000 5,000	1.00 100.00	117,632.00
3000XXXX 11100736	SEC TCHR-ALG 4 MATH 1 TITLV 1 SECONDARY TEACHER	CSXX 13027	23 10	654321/654321 DOE, JOHN	1 of 1	R1 Regular/Permanent	Active Active	07/01/2017 12/31/9999	6,000 5,000	1.00 100.00	104,957.00

Report Field Descriptions

1. Fund Center Description – Fund Center and Fund Center Name
2. Version:
 - a. BP1 = Budget Development (Base allocation based on ECast)
 - b. CM0 = Current Modified Version (Current Maintenance)

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

- c. FNO = 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.



- 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 position.
 - i. 1 of 1 = one position/one incumbent
 - ii. 1 of 2 = one position/two incumbents
- 9. Employee Subgroup & Description - Identifies the status of

BUDGET SERVICES AND FINANCIAL PLANNING SCHOOL FISCAL SERVICES

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.