

Budget Services and Financial Planning School Fiscal Services

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

Business Tools for Schools

User *

Password *

* Enter your Single Sign-On (email) username and password to Log In.
e.g. (msmith@lausd.kf2.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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From SAP Home Page **Financials/Budget** tab, click **"SAP Budget – Schools Front End"**

Welcome RF706 - School Budget Submitter

Home **Financials/Budget** Systems Access Request Recruiting

Financials/Budget

Overview

Detailed Navigation

- SAP Financials
- SAP Budget
- SAP Budget - Schools (version CM0 / 20...
- SAP Budget - Schools Front End**

Portal Favorites

Overview

LRF

Budget Services and Financial Planning School Fiscal Services

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

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 | ENO Final Version | 2020 | Locked |
| Budget Maintenance | CMO Current Maintena... | 2020 | |

1

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 |
| 2 Progress Report | School Discretionary Programs Rep | School Budget Summary |
| 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 | |

Budget Services and Financial Planning School Fiscal Services

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**.

7 SFE - Position With Incumbent Report

Display Options

Display in Grid

6 Display in Form

Display Variant

Incumbent Data

















As of Date 08/23/2019

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

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

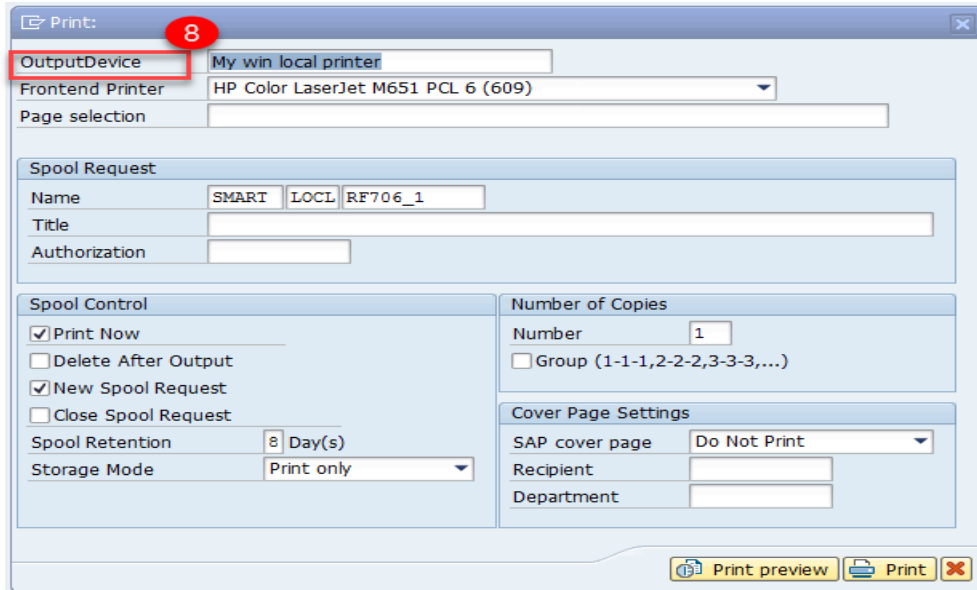
Download App Server File

Report Characteristics Other Characteristics Key Fields Groups Budget Attributes

| | | | |
|------------------------|-------------------------------------|----|---|
| Version | <input checked="" type="checkbox"/> | | |
| Fiscal Year | <input checked="" type="checkbox"/> | | |
| Fund Center | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Position Number | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Job | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Personnel Area | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Personnel Subarea | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Payscale Group | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Payscale Level | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Personnel Number | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Personnel ID | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Employee Status | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| Employee Subgroup | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| HR Payscale Start Date | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| HR Payscale End Date | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| HR Payscale Group | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| HR Payscale Level | <input type="checkbox"/> | to | <input type="checkbox"/>  |
| LAUSD Program | <input type="checkbox"/> | to | <input type="checkbox"/>  |

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

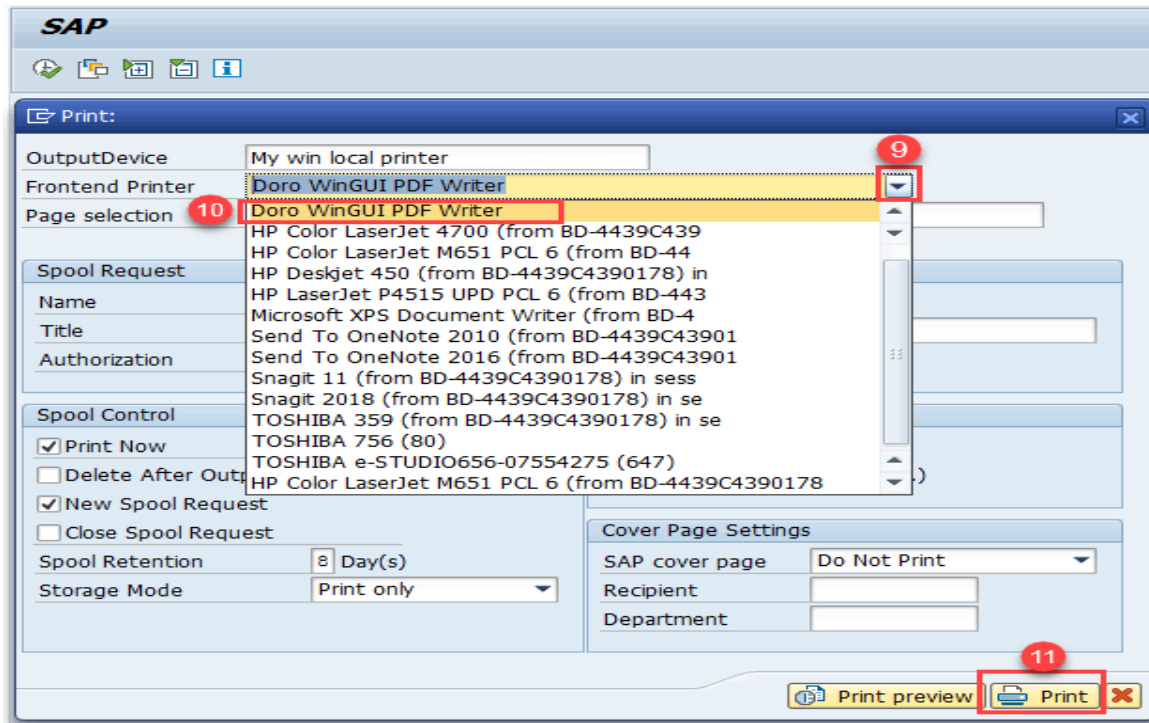


9. Click on the **dropdown icon**  on the Frontend Printer

10. Select **Doro WinGUI PDF Writer**

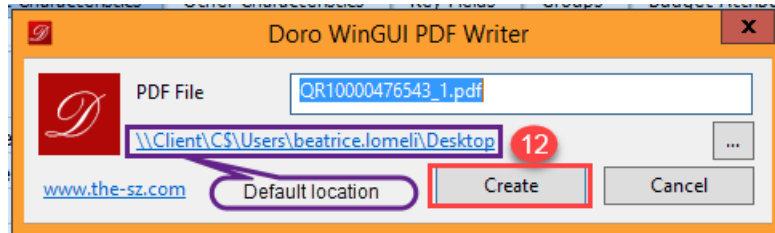
11. Click on **Print**

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



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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.

QR10000476543_1.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools QR10000476543_... x

Save Refresh Print Email Search 1 / 3 102% Print Comment

Position With Incumbent

| | | |
|--------------------|---------|--------------------------|
| Fund Center | 1234501 | ABC School |
| Version | CMO | 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 | Incumbs | Employee Subgroup Description | Emp Status Pos Status | Start End | Hrs/Day Days/Wk | FTE Fund % | Salary Amount (w/ Benefits) |
|--------------|--------------------------------|----------|-----------------|-------------------------------------|---------|-------------------------------|-----------------------|------------|-----------------|------------|-----------------------------|
| 30345207 | ELEM TCHR | CSXX | 23 | | 1 of 1 | R1 | Active | 07/01/2018 | 6.000 | 1.00 | 99,790.00 |
| 11100731 | ELEMENTARY TEACHER | 13027 | 10 | | | Regular/Permanent | Active | 12/31/9999 | 5.000 | 100.00 | |
| 30345865 | ELEM TCHR | CSXX | 27 | | 1 of 1 | R1 | Active | 07/01/2017 | 6.000 | 1.00 | 117,519.00 |
| 11100731 | ELEMENTARY TEACHER | 13027 | 14 | | | Regular/Permanent | Active | 12/31/9999 | 5.000 | 100.00 | |
| 30346159 | ELEM TCHR | CSXX | 25 | | 1 of 1 | R1 | Active | 07/01/2018 | 6.000 | 1.00 | 89,153.00 |
| 11100731 | ELEMENTARY TEACHER | 13027 | 04 | | | Regular/Permanent | Active | 12/31/9999 | 5.000 | 100.00 | |

Budget Services and Financial Planning School Fiscal Services

Report Field Descriptions

Position With Incumbent

| | | | |
|---|-------------|------|--------------------------|
| 1 | Fund Center | | |
| 2 | Version | CM0 | Current Modified Version |
| 3 | Fiscal Year | 2016 | |

Italics = HR Data
0 = Obsolete

| | | | | | | | | | | | |
|----------|----------------------|------|----------|-----------------------|--------|-------------------|------------|-------|---------|--------|---------------|
| 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | |
| Position | Position Description | PSA | PS Grp | Person # / ID | Incumb | Employee Subgroup | Emp Status | Start | Hrs/Day | FTE | Salary Amount |
| Job | Job Title | Prog | PS Level | Last Name, First Name | | Description | Pos Status | End | Days/Wk | Fund % | (w/ Benefits) |

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.

Key Term - Personnel Sub Area

Basis
 A= A Basis
 B= B Basis
 C= C Basis
 D= D Basis
 E= E Basis

N= Non Employee
 X= X Basis
 Z= Z Basis

Calendar
 A= Adult School
 F= 4-Track (90-30)
 G= General Calendar
 J= Job Cost Calendar
 S= Single Track Calendar
 T= 3-track (Concept - 6)

Placeholders
 Currently not used by the District

CTXX

- 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.

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- b. PS Level – The pay scale level represents the step or level from the salary table.
8. Person #/ID, Last Name, First Name, and Incumbents
- 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. Incumbents – 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 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.