

# Transfer to New Vacant Position

1. **Right click** a position row you wish to insert a new position and select **Budget For > A New Position**

SCHOOL BUDGET

Scenario Budget: FY21 Entity: 0280 Darnell, Marshall C.ES

**MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION**

Version: Working\_SB

Administrative | **Licensed** | Support | Add'l Earnings | Supplies and Other Svcs | SLA

Job Code	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Src	FS Amort
						Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed		
KDG 1 AM/1 PM1 - C1000	Assumption	Assumption	Assumption	Assumption	Assumption	100.00						100.00	88
P_10010117_1 KDG 1 AM/1 PM	Assumption		8/7/19		1.00	100.00						100.00	88
P_10010117_1 KDG 1 AM/1 PM	Assumption		8/7/19		0.00	100.00						100.00	88
P_10010117_1 KDG 1 AM/1 PM	Assumption		8/7/19		1.00	100.00			0.00			100.00	88
P_10010117_1 KDG 1 AM/1 PM	Assumption		8/7/19		1.00	100.00						100.00	88
GRADE 1 - C1010	Assumption		8/7/19		1.00	71.14	28.86					100.00	62
P_10010118_1 GRADE 1	Assumption		8/7/19		1.00		100.00					100.00	
P_10010118_1 GRADE 1	Assumption		8/7/19		0.00	100.00						100.00	
P_10010119_1 GRADE 1	Assumption		8/7/19		0.00		100.00					100.00	

**SUMMARY TOTALS**

CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	Gen GATE	Sp Ed	ZFS-NOEDIT
0.98	0.00	0.00	1.01	0.00	1.01	0.00	(88,205.51)	0.00	(88,205.51)	

ALLOCATED FUNDS: Target All Jobs

BUDGET SPENT:

Context Menu: Calc Total Position Costs, Mass Calc, Update Funding Source Allocations, Edit Position Info, Go to Licensed Summary, View Fund Source to GL Allocations, View Fund Source Supplies, Calculate Fund Source Supplies, **Budget For...**, A New Position, Prep Buyout - Licensed, Add-On and Extra - Licensed, Delete Position Info, Go To Full Screen

2. **Confirm the Job selected is correct**, then click **Actions > Add Position**

SCHOOL BUDGET

SB Home > SB Add Position

Period BegBalance: FY21 Scenario Budget: Version Working\_SB Entity: 0280 Darnell, Marshall C.ES Job: KDG 1 AM/1 PM1 - C1000

Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	Gen Fund	HOPE2	GenF SB178	Magnet	Title I	21st Century	Adult Ed	Adult Correct	Bon
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption									

There are no valid rows of data for this form.

Actions: Add Position, Calc Total Position Costs, Edit Position Info, View Fund Src to GL Allocations, Filter, Analyze, New Ad Hoc Grid, Show Reasons for Read-Only Cells

3. Follow the same procedure when adding a new position and **Launch**:

**NextPositionAdd**

Launch Cancel

\* Enter proposed number of FTE to purchase: 1

\* Select FROM Job Code: "C1000"

\* Enter Default as VACANT: Vacant

\* New Position Default is 100% to General Fund: 100

\* Default is 1 for Primary job with EGI. Enter 2 if Secondary job and no EGI.: 1

4. Enter the desired funding source allocation, then click **Save**:

### SCHOOL BUDGET

SB Home > SB Add Position

Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0280 Darnell, Marshall C.ES	Job KDG 1 AM/1 PM1 - C1000	Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	Gen Fund	HOPE2	GenF SB178	Magnet	Title I	21st Century	Adult Ed	Adult Correct	Bond Fund	
						Assumption	Assumption	Assumption	Assumption	Assumption	Assumption										
New Position 2	Vacant		1									50		50							

5. Highlight the New position row > right-click > **Calc Total Position Costs**:

### SCHOOL BUDGET

SB Home > SB Add Position

Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0280 Darnell, Marshall C.ES	Job KDG 1 AM/1 PM1 - C1000	Employee	Planned FTE	Months Work	Hours Per Day Override	Eff Start Date	Eff Stop Date	Gen Fund	HOPE2	GenF SB178	
						Assumption	Assumption	Assumption	Assumption	Assumption	Assumption				
												50		50	

6. Return to the previous *SB Position Info Detail-Licensed Transf* form and note the new position added. Review the licensed page to identify the employee you want to transfer as well as the new position details to transfer that employee to:

### SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C.ES	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				Total Fund Src		
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1	FIORE MICHELLE L EM_313757		8/7/19		1.00	100.00						10	
		Employee 2	GAMES JULIA EM_317091		8/7/19		0.00	100.00						10	
		Employee 3	SAMPALIO AMANDA LEE EM_544838		8/7/19		1.00	100.00				0.00		10	
		Employee 4	BASSETT LINDA K EM_557543		8/7/19		1.00	100.00						10	
New Position 2	Vacant						1.00	50.00			50.00		10		
GRADE 1 - C1010	P_10010118_1 GRADE 1	Employee 1	OFREIL CHRISTINE E EM_250103		8/7/19		1.00	71.14	28.86					10	
		Employee 2	OBBERG BRIANNA CHRISTINE EM_531258		8/7/19		1.00		100.00					10	
		Employee 3	TZITBINAKOS AMANDA R EM_553223		8/7/19		0.00	100.00						10	
GRADE 1 - C1010	P_10010119_1 GRADE 1	Employee 1	LOUCKS MARLA EM_528596		8/7/19		0.00		100.00					10	
		Employee 2	DUNN KERI N EM_548996		8/7/19		0.00		100.00					10	
GRADE 2 - C1020	P_10010120_1 GRADE 2	Employee 1	OREA ESYR A EM_10114273		7/31/19		1.00	100.00						10	
		Employee 2	EBERT DORIS EM_557298		8/7/19		1.00	100.00						10	
GRADE 2 - C1020	P_10010121_1 GRADE 2	Employee 1	SHHEIBER COLLEEN R EM_10031201		8/7/19		1.00	100.00						10	
		Employee 2	SZEPELAK SUSAN EM_317894		8/7/19		1.00	100.00						10	

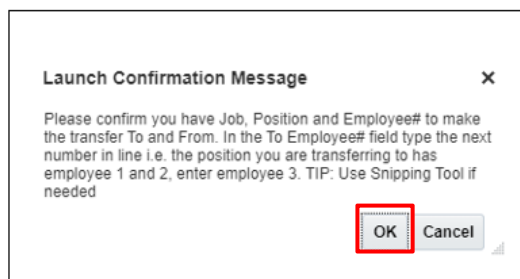
7. Highlight the employee row > Right Click > Select **Transfer Position**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 6290 Darnell, Marshall C ES	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Strc		
						Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocation Pct	
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1		Transfer Position													
		Employee 2		Calc Total Position Costs													
		Employee 3		Mass Calc		8/7/19			1.00	100.00							10
		Employee 4		Update Funding Source Allocations		8/7/19			0.00	100.00							10
GRADE 1 - C1010	P_10010118_1 GRADE 1	Vacant		Edit Position Info		8/7/19		1.00	100.00			0.00				10	
		Employee 1		Go to Licensed Summary		8/7/19		1.00	100.00							10	
		Employee 2		View Fund Source to OL Allocations		8/7/19		1.00	71.14	28.86			50.00				10
		Employee 3		View Fund Source Supplies		8/7/19		1.00	100.00								10
GRADE 2 - C1020	P_10010121_1 GRADE 2	Employee 1		Calculate Fund Source Supplies		8/7/19		0.00	100.00							10	
		Employee 2		Budget For...		8/7/19		0.00		100.00						10	
		Employee 1		Delete Position Info		8/7/19		1.00		100.00							10
		Employee 2		Go To Full Screen		7/31/19		1.00	100.00								10
		Employee 1		Edit Position Detail		8/7/19		1.00		100.00						10	
		Employee 2		Edit		8/7/19		1.00		100.00						10	

8. A confirmation message appears to remind the User to make a note of the target **job/position/employee**. Click **OK** when ready to proceed.



9. Edit the Transfer Position prompts as needed. The *FROM* position information is on the left and pre-filled with the employee row you selected to transfer (from where the User originates the right-click action). The *TO* position information is on the right and needs to be updated with the *identified job/position/employee* in the previous step. Click **Launch** to complete the transfer process:

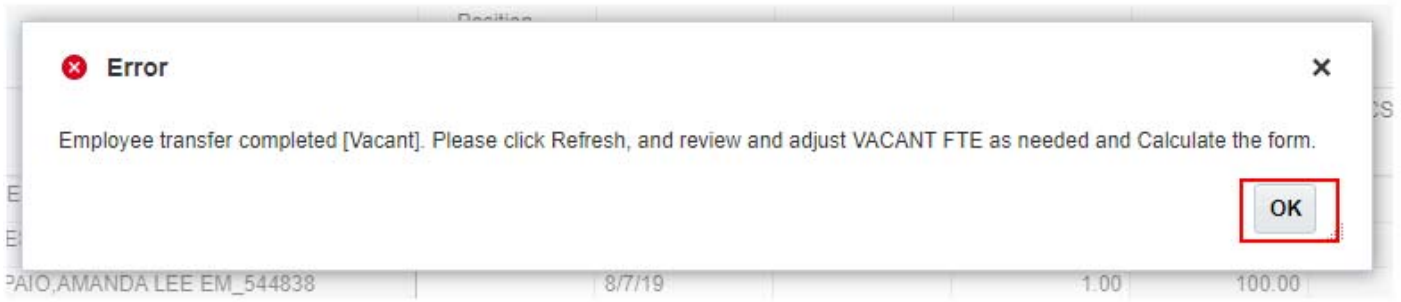
Transfer Position

Launch Cancel

* Select FROM Employee	"Employee 4"	
* Select FROM Job Code	"C1000"	
* Select FROM Position	"P_10010117_1"	
* Select TO Employee	"Employee 2"	
* Select TO Position	"New Position 2"	
* Select TO JOB	"C1000"	

**Tip:** Update the **TO Employee** with the next Employee # from the target row (i.e. if the target row has *Vacant* or *Employee 1*, then update the **TO Employee** field with "Employee 2").

10. When the process is done, you will see the pop up window below. It is not an ERROR, it is instructions of the next steps to take (Refresh, Review, Adjust, and Calculate). Click **OK** to continue:



11. Click **Refresh**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C ES	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Src
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM			Employee 1	FIORE,MICHELLE L EM_313757	8/7/19		1.00	100.00						10
				Employee 2	GAMES,JULIA A EM_317091	8/7/19		0.00	100.00					10	
				Employee 3	SAMPAIO,AMANDA LEE EM_544838	8/7/19		1.00	100.00			0.00		10	
				Employee 4	BASSETT,LINDA K EM_557543	8/7/19		1.00	100.00					10	
				New Position 2	Vacant	Vacant		1.00	50.00				50.00		10

The transferred employee rows will be displayed in yellow:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C ES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Src
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM			Employee 1	FIORE,MICHELLE L EM_313757		8/7/19		1.00	100.00						10
				Employee 2	GAMES,JULIA A EM_317091		8/7/19		0.00	100.00						10
				Employee 3	SAMPAIO,AMANDA LEE EM_544838		8/7/19		1.00	100.00			0.00			10
				Employee 4	BASSETT,LINDA K EM_557543	P_10010117_1	8/7/19		0.00	100.00						10
				New Position 2	Employee 2	BASSETT,LINDA K EM_557543	P_10010117_1	8/7/19		1.00	50.00				50.00	

12. Calculate each row: **right-click** the highlighted row > **select Calc Total Position Costs**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C ES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Src
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM			Employee 1	FIORE,MICHELLE L EM_313757		8/7/19		1.00	100.00						10
				Employee 2	GAMES,JULIA A EM_317091		8/7/19		0.00	100.00						10
				Employee 3	SAMPAIO,AMANDA LEE EM_544838		8/7/19		1.00	100.00			0.00			10
				Employee 4	BASSETT,LINDA K EM_557543	P_10010117_1	8/7/19		0.00	100.00						10
				New Position 2	Employee 2	BASSETT,LINDA K EM_557543	P_10010117_1	8/7/19		1.00	50.00				50.00	

13. When done the updated rows will no longer display in yellow highlight. Review the resulting *calculated* cost to ensure the process calculated the desired results:

SCHOOL BUDGET



Save Refresh Actions  Complete

SB Home > SB Position Info Detail-Licensed Transf

Scenario	Version	Year	Entity										
Budget	Working_SB	FY21	0200 Darnall, Marshall C ES										
				Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB176
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1	FIORE, MICHELLE L EM_313757				8/7/19		1.00	100.00			
		Employee 2	GAMES, JULIA A EM_317091				8/7/19		0.00	100.00			
		Employee 3	SAMPAIO, AMANDA LEE EM_544838				8/7/19		1.00	100.00			0.00
		Employee 4	BASSETT, LINDA K EM_557543	P_10010117_1			8/7/19		0.00	100.00			
		New Position 2	Employee 2	BASSETT, LINDA K EM_557543	P_10010117_1			8/7/19		1.00	50.00		