



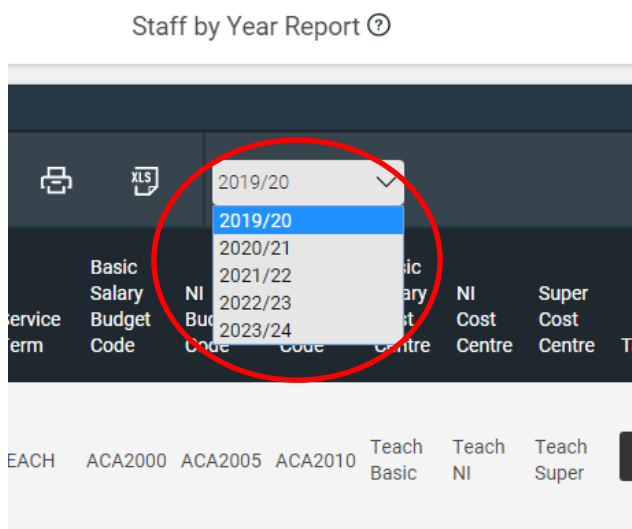
SBS Budgets Staff by year Report functionality

Loading the Staff by Year Report

1. Follow the path Staffing > Staff by Year Report



2. The report loads a year at a time, if you wish to view a different year within the budget, use the drop-down option



Formatting the report – Hiding columns

1. Select the header of the column you wish to hide

Staff by Year Report ?

Actions Filters Hidden										
First Name	Last Name	Employee Number	Contract Name	Type	Service Term	Basic Salary Budget Code	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	
<input type="checkbox"/>	Rocky	Balboa	157912	Contract 1	Support	PREM	ACA2300	ACA2305	ACA2310	Support Basic
<input type="checkbox"/>	Annette	Benning	157900	Contract 1	Support	CLEAN	ACA2300	ACA2305	ACA2310	Support Basic
<input type="checkbox"/>	Sean	Connery	157907	Contract 1	Support	MIDDAY	ACA2600	ACA2600	ACA2600	Support Basic

2. Select the option to 'hide' the header

Staff by Year Report ?

Actions Filters Hidden										
First Name	Last Name	Employee Number	Contract Name	Type	Service Term	Basic Salary Budget Code	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	
<input type="checkbox"/>	Rocky	Balboa	157912	Contract 1	Support	PREM	ACA2300	ACA2305	ACA2310	Support Basic
<input type="checkbox"/>	Annette	Benning	157900	Contract 1	Support	CLEAN	ACA2300	ACA2305	ACA2310	Support Basic
<input type="checkbox"/>	Sean	Connery	157907	Contract 1	Support	MIDDAY	ACA2600	ACA2600	ACA2600	Support Basic

- Staff by Year Report ?

Actions	Filters	Hidden 1
		2019/20

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	N
<input type="checkbox"/>	Rocky	Balboa	157912	Contract 1	Support	PREM	ACA2305	ACA2310	Support Basic	SU
<input type="checkbox"/>	Annette	Benning	157900	Contract 1	Support	CLEAN	ACA2305	ACA2310	Support Basic	SU

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Formatting the report – Adding Subtotals

1. Select the subtotal icon directly under actions. The icon will be orange when it is being used.

Staff by Year Report ?

Actions Filters Hidden 1

2019/20

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	NI Budget Code	Super Budget Code	Basic Salary Cost Centre
<input type="checkbox"/>	Rocky	Balboa	157912	Contract 1	Support	PREM	ACA2305	ACA2310	Support Basic
<input type="checkbox"/>	Annette	Benning	157900	Contract 1	Support	CLEAN	ACA2305	ACA2310	Support Basic

2. For the subtotalling to take effect, you will need to choose a column to sort by. To do this, select the header of the column you wish to sort by

Staff by Year Report ?

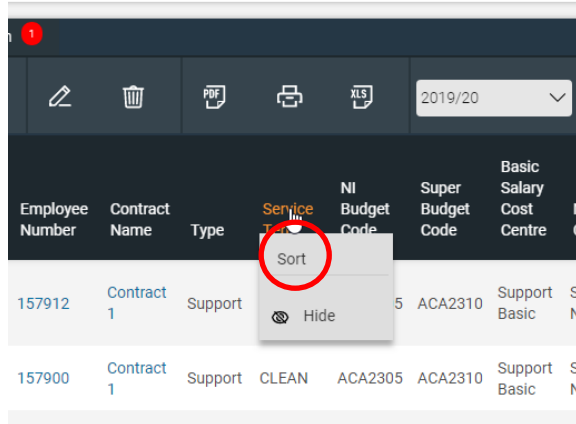
Filters Hidden 1

2019/20

	Last Name	Employee Number	Contract Name	Type	Service Term	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	NI Ce
	Balboa	157912	Contract 1	Support	PREM	ACA2305	ACA2310	Support Basic	Su NI
e	Benning	157900	Contract 1	Support	CLEAN	ACA2305	ACA2310	Support Basic	Su NI
	Conroy	157907	Contract	Support	MIDAY	ACA2305	ACA2310	Support	Su

3. Select the option to sort

Staff by Year Report ?



Employee Number	Contract Name	Type	Service Type	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	NI Code
157912	Contract 1	Support	Sort	5	ACA2310	Support Basic	Si
157900	Contract 1	Support	CLEAN	ACA2305	ACA2310	Support Basic	Si

You will then have a subtotal line based on your sorted field and a complete total of all staffing at the bottom of the page.

Staff by Year Report ?

74 items : 1 pages

Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Basic	NI	Super	Total Cost
2,893.99	2,893.99	2,893.99	2,893.99	2,893.99	2,893.99	2,893.99	26,105.88	2,440.10	6,181.87	34,727.85
3,406.07	3,406.07	3,406.07	3,406.07	3,406.07	3,406.07	3,406.07	30,575.60	3,056.92	7,240.30	40,872.82
4,247.08	4,247.08	4,247.08	4,247.08	4,247.08	4,247.08	4,247.08	37,916.40	4,069.95	8,978.60	50,964.95
3,383.16	3,383.16	3,383.16	3,383.16	3,383.16	3,383.16	3,383.16	30,375.60	3,029.32	7,192.94	40,597.86
142,811.65	142,811.65	142,811.65	142,811.65	142,811.65	142,811.65	142,811.65	1,276,978.67	134,372.58	302,388.56	1,713,739.80
216,385.05	216,385.05	217,257.79	217,257.79	217,257.79	217,257.79	217,257.79	1,963,264.04	190,256.86	447,463.11	2,600,984.31

Formatting the report - Filtering

Only want to see how much your teachers are costing?

1. Select the 'Filters' tab

Q Staff by Year Report ?

Actions **Filters** Hidden 1

2019/20

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	NI Budget Code	Super Budget Code	Basic Salary Cost Centre
<input type="checkbox"/>	Judi	Dench	676565	Contract 1	Support	ADMIN	ACA2405	ACA2410	Support Basic

2. Use the 'type to filter' box above the header you wish to filter by

Q Staff by Year Report ?

Actions **Filters** Hidden 1

type to filter type to filter type to filter type to filter **type to filter** type to filter

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	NI Co
<input type="checkbox"/>	Judi	Dench	676565	Contract 1	Support	ADMIN	AC

3. Type what you wish to filter, the report will automatically remove all items not relevant.

Q Staff by Year Report ?

Actions Filters 1 Hidden 1

type to filter type to filter type to filter type to filter Teacher X type to filter

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	
<input type="checkbox"/>	John	Smith	983654	Contract 1	<u>Teacher</u>	LEAD	A
<input type="checkbox"/>	Rosamund	Pike	973643	Contract 1	Teacher	LEAD	A

4. Go back to the 'actions' tab

Q Staff by Year Report ?

Actions Filters 1 Hidden 1

type to filter type to filter type to filter type to filter Teacher X type to filter

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	
<input type="checkbox"/>	John	Smith	983654	Contract 1	Teacher	LEAD	AC
<input type="checkbox"/>	Rosamund	Pike	973643	Contract 1	Teacher	LEAD	AC









You will notice, like the hidden items, the number of filters you have are displayed in a red circle beside filters.

Exporting the report

1. You can export the report the report to PDF, print or excel

Q Staff by Year Report ?

Actions Filters 1 Hidden 1









2019/20

	First Name	Last Name	Employee Number	Contract Name	Type	Service Term	NI Budget Code	Super Budget Code	Basic Salary Cost Centre	NI C
<input type="checkbox"/>	John	Smith	983654	Contract 1	Teacher	LEAD	ACA2005	ACA2010	Teach Basic	Teac NI
<input type="checkbox"/>	Rosamund	Pike	973643	Contract 1	Teacher	LEAD	ACA2005	ACA2010	Teach Basic	Teac NI