



# How to include/exclude staff contracts from a budget in SBS Budgets

## How to include/exclude staff contracts from a budget

There are two methods to excluding contracts from budgets, one which can be done on a contract-by-contract basis and another which can be done in bulk.

I will cover the individual contract method first.

Start off in **Staffing > Staff Contracts**, click edit to the right of the contract you wish to include/exclude from a budget (as circled in red below).

Actions	Filters	Hidden	20 items : 1 pages									
Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service Term	Tags	Fund Codes	Start	End	Budget Count	Actions
<input type="checkbox"/>	Contract 1	9836754	Mary	Berry	Teacher	LEAD	Pupil Premium (20%) Year 2 (40%)		1st September, 2020		3	<a href="#">edit</a>

After this screen has loaded, select the **Budgets** tab as shown below.

Q

Edit Contract ⓘ

Contract Details

Salary Details

Budgets

Notes

**Note:** A contract can exist across multiple budgets. Ensure you review the 'Inclu

Staff member: Berry, Mary - 9836754

[or create new staff member...](#)

When on the Budgets tab, you will be able to either include or exclude the contract from the budgets of your choosing from the list of available budgets. The toggle switches have been highlighted in the below image.

Contract Details

Salary Details

Budgets

Notes

Include in budgets:










☒ Example Budget 21/22 (auto duplicate)
 ☐ Initial Budget 2021/22 (scenario)
 ☐ Initial Budget 2021/22
 ☐ Initial Budget 2020/21

If the switch is black, it is indicating that the costings for that contract are being included in that budget. However, if the switch is grey, it is letting us know that the costings are **not** being included in that particular budget.

There is also the option to exclude and include contracts from your current budget in bulk.

To do this, again start at **Staffing > Staff Contracts**.

This time however, we are going to be cherry picking the contracts we wish to include/exclude.

Actions	Filters	Hidden						
								
	Current Budget	Contract Name	Employee Number	First Name	Last Name			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract 1	7837434	Jessica	Alba			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract 1 (scenario)	7837434	Jessica	Alba			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract 1	9836754	Mary	Berry			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract 1	5437689	Kate	Bush			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract 1	3444785	Eric	Cantona			

You will be able to cherry pick the contracts via the checkboxes as circled in blue above. If you would like to select all, click the checkbox highlighted in green above.

The column highlighted with the red circle will show green ticks if the contract is included in your currently selected budget (this is the budget shown in the **green box** in the top left corner). If the contract is not included, there will not be a green tick.

When selecting contracts via the checkboxes, you will notice the selected lines will turn blue.

Once you have either cherry picked or selected all the contracts you wish to include or exclude in your **current** budget, you can use either the paper icon with a tick (as displayed below circled in green) to **include** in your current budget, or the paper icon with a cross (as shown in red below) to **exclude** from your current budget.

