



# eHR WSF Position Buy/Sell Quick Sheets

**10-2-2012**

For Questions please contact your  
Complex Area Business Manager



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## Basics

**Important Notes:** DO NOT use the internet browser back arrow. For additional information, click **Help** from the WSF Position Buy/Sell module and review the overview document.

**The system will automatically time you out after thirty (30) minutes of inactivity. To remain active in eHR, you must either save your work or navigate through the eHR system. This is a security measure implemented to avoid misuse of the system. Please ensure that you save your transactions as you go to avoid losing any transactional history.**

### Logging into the eHR System

**Description:** How to access the WSF Position Buy/Sell Process via the Internet.

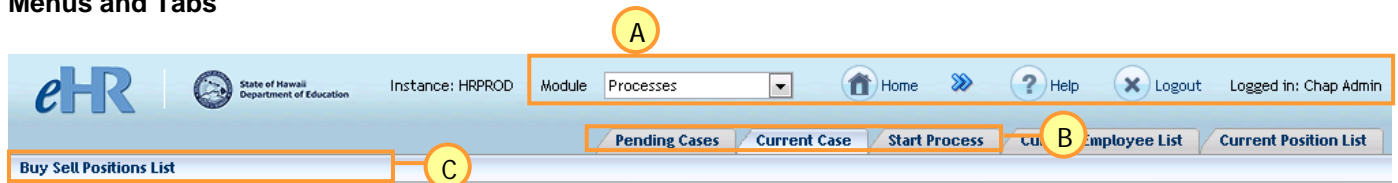
**Important Notes:** Browser pop-up blockers need to be disabled for the eHR website. Please consult your internet browser Help for assistance to allow pop-ups from this website.

1. Open up an **internet connection**  
Note: Internet Explorer and Mozilla Firefox browsers are supported.
2. Type in the URL address: <https://ehr.k12.hi.us/hrprod/>  
Note: The address starts with "https", not "http".
3. Enter your **User Name** and **Password**.
  - Your User Name is either your Employee ID that is listed on your DOE ID Badge or your Lotus Notes Webmail User Name.
  - Your Password is your Lotus Notes Webmail Password.
4. Click on **OK**.





**Menus and Tabs**



**A Standard Module Navigation Menu**

| Title                | Description   |
|----------------------|---|
| Module Dropdown Menu | Enables access to different modules.  |
| Home                 | Returns user back to the Home Page from any module.   |
| Help                 | Opens the Help feature (pop-up window) which provides useful information specific to the page being viewed. <ul style="list-style-type: none"> <li>For example, clicking on Help from the WSF Position Buy/Sell page will bring you to a Help page that contains a menu window which allows you to access a variety of Help topics such as the Screen Overview, Screen Actions, Quick Sheets, etc.; while clicking on Help from the Reports page will bring you directly to a Help document summarizing how to use the report functionality.</li> </ul> |
| Login/Logout         | Displays user name and enables user to log out from the system.   |

**B Case Tabs**

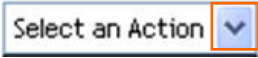







| Title   | Description  |
|---|--|
| <b>Process Case Definition:</b> For each process that exists, a process case represents an instance of that process. For example, "WSF Buy Position" has been defined as a process. By creating a new case, the user will have created a unique process case for buying a WSF position. |  |
| Pending Case  | Displays cases that require some action by the user. Click on the checkbox next to "Show All Cases" to view all cases the user has been or is involved in. |
| Start Process   | Enables user to create a new case.   |

**C View Selections**

| Title                   | Description   |
|-------------------------|---|
| Buy Sell Positions List | Screen from which to initiate requests. Also provides a list of positions that are available for the user take action on. |



Icons and Navigation

| Title   |   | Description  |
|---|---|--|
| Dropdown menus  |                | Downward blue arrows indicate dropdown menus which are predefined options from which users may select.   |
| Flashlight  |                | The Flashlight icon indicates a “look up” feature that allows users to view and select specific information. Alternatively, information may be entered directly into the field using your keyboard.  |
| -Hide   |                | Hides additional information about a specific record.  |
| Memo Pad  |                | Clicking on the Memo Pad icon will bring up a text editor window.  |
| Page Title  | Example:<br><b>Fill Position</b>  | The Page Title is displayed at the upper left of the screen. The Page Title describes the action that is being performed. In this example, the page title is called “Fill Position”.   |
| Radio Button  |              | Radio Buttons enable users to select specific items, in this case a specific record, on which to work.   |
| Required Fields   |              | The asterisk indicates this is a required field. The system prevents users from moving forward with a specific task if a required field is not completed.  |
| +Show   |              | Displays additional information about a specific record.   |
| Keyboard Shortcut Keys<br>(Alt+ <i>shortcut letter</i> ) or<br>(Alt+Shift+ <i>shortcut letter</i> ) | Example:<br> | Buttons with text that contain an underlined letter indicate that the button can be executed with a keyboard shortcut key. Depending on the browser being used, this can be done by using Alt+ <i>shortcut letter</i> or Alt+Shift+ <i>shortcut letter</i> , where the shortcut letter is the letter underlined. Refer to your browser’s documentation for more information.<br><br>For example, from the Financial Plan Details screen you can add a new row by using Alt+A or Alt+Shift+A. |



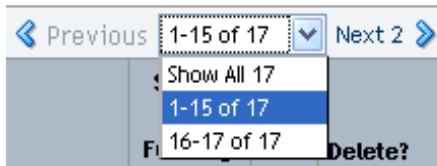
## Record Display

### All Record Display

Some pages default to displaying all records.

### Select Number of Record Display

Other pages default to a set number of records. For example, the Buy Sell Positions List displays just the first fifteen (15) records. Additional records may be displayed by using the dropdown menus, or the previous and next buttons.



## Sorts and Filters

|                                      | How to Sort/Filter  | How to Return Information back to original view |
|--------------------------------------|---|---|
| <b>Sorting by Columns</b>            | <p>Click the <b>column header</b> to quickly sort information displayed in a table.</p> <ul style="list-style-type: none"> <li>For example, clicking on the column header for Posn No, will sort records in ascending order numerically by Position Number.</li> </ul>  |   |
| <b>Filters/ Quick Search</b>         | <p>Specific modules have a basic search feature which allows for the entry of criteria for record selection. Filters may be a dropdown or a textbox.</p> <p>Enter text to search for into textboxes and/or select criteria from dropdowns and click on <b>Go</b>.</p>   | Erase the filter criteria and click <b>Go</b> . |
| <b>Advanced Search</b>               | <p>Specific modules also have an advanced search feature which allows for the entry of multiple criteria with several options for record selection. Filters may be a dropdown or a textbox.</p> <p>Enter text to search for into textboxes and/or select criteria from dropdowns and click on <b>Find</b>.</p>  | Click <b>Quick Search</b> .                     |
| <b>Searching Using Wildcards (%)</b> | <p>The % key is used as a wildcard and can be used in textboxes with <b>Quick Search</b> and <b>Advanced Search</b>. It can be used before and/or after a portion of the information you are looking for. For example, to see both 10 and 12 month Elementary positions, type in %elem% to pull up all positions that have "elem" as a part of their title.</p> |   |



## Getting Started

### Initiating a Buy/Sell Request

Description: How to generate a WSF Position Buy/Sell Case.

- Under **Module** dropdown, select **Processes**. **A**
- Click on **Start Process** tab. **B**
- Select one of the following options:
  - 6.1.3.1 – WSF Buy Position.** **C**
  - 6.1.3.2 – WSF Sell Position.** **D**
- Click on **Start New Process**. **D**
- Enter a **Process Case Label**. **E**
  - Please use the following convention when naming your case:  
**School Name position type – buy or sell (i.e. Aloha EI Cert – Buy)**
  - Please note that you will be unable to change the Process Case Label once the Case has been created.
- Select the type of request (**Buy or Sell**) and position type (**HR Category: Certificated or Classified**) from the dropdown lists. **F**
- Click on **Submit Parameters**. **G**

The screenshot displays the eHR system interface for initiating a buy/sell request. The top navigation bar includes the eHR logo, State of Hawaii Department of Education, and Instance: HRPROD. A dropdown menu for 'Module' is set to 'Processes'. A 'Start Process' button is highlighted. Below this, the 'Start Process' section shows a 'Process Category' dropdown set to 'Position Management' and a 'Process Description' field. A table lists four process options: 'WSF - Buy Position', 'WSF - Sell Position', 'ICAA Buy Position', and 'ICAA Sell Position'. The 'WSF - Buy Position' option is selected. A 'Start New Process' button is highlighted. Below the table, the 'Process Case' section shows a 'Process Case Label' field with the text 'Aloha EI Cert - Buy'. Below this, a 'Parameters' table shows 'Buy or Sell' set to 'Buy', 'HR Category' set to 'Certificated Personnel', and 'Admin Location' set to '00'. A 'Submit Parameters' button is highlighted.

| Select                           | Details              | Process Category    | Process ID | Process Description |
|----------------------------------|----------------------|---------------------|------------|---------------------|
| <input checked="" type="radio"/> | <a href="#">Show</a> | Position Management | 6.1.3.1    | WSF - Buy Position  |
| <input type="radio"/>            | <a href="#">Show</a> | Position Management | 6.1.3.2    | WSF - Sell Position |
| <input type="radio"/>            | <a href="#">Show</a> | Position Management | 6.1.3.3    | ICAA Buy Position   |
| <input type="radio"/>            | <a href="#">Show</a> | Position Management | 6.1.3.4    | ICAA Sell Position  |

| Prompt Text    | Parameter Value        |
|----------------|------------------------|
| Buy or Sell    | Buy                    |
| HR Category    | Certificated Personnel |
| Admin Location | 00                     |





## Logging Back into a WSF Buy/Sell Request

Description: How to access a WSF Position Buy/Sell request that has been previously generated.

1. Under **Module** dropdown, select **Processes**. A
2. Click on **Pending Cases** tab. B
3. Click the “select” radio button for the desired WSF Buy/Sell Request case. C
4. Click on **Go To Case**. D

### Notes:

- Alternatively, you can click on the “Go to Pending Tasks” button in the Messages box from the Home page for steps 1 and 2 above. The Task, Case Label, and Process Case Step Key columns will probably be the most helpful in finding the desired Buy/Sell Request case.
- By default, the Pending Cases tab will only show Pending Cases that the user needs to take action on. For example, if a Buy/Sell Request has already been approved, the case will not show in the Pending Cases tab by default. To see all cases, make sure that the “Show All Cases” checkbox is checked.

The screenshot shows the eHR system interface. At the top, there is a navigation bar with the eHR logo, the State of Hawaii Department of Education logo, and the instance name 'HRDEVL'. The 'Module' dropdown menu is set to 'Processes' (labeled A). Below the navigation bar, there are several tabs: 'Pending Cases' (labeled B), 'Start Process', 'Current Employee List', and 'Current Position List'. The 'Pending Cases' tab is active, showing a list of cases. The 'Filter By' dropdown is set to 'Process Case Label'. Below the filter, there is a 'Go To Case' button (labeled D) and a 'Re-Run With Params' button. The 'Show All Cases' checkbox is checked. The table below shows a single case with the following details:

| Select                           | Details                | Task Description | Process Case Step Key | Process Case Label  | Process Step Status | Location Description | Last Updated By | Last Update Date |
|----------------------------------|------------------------|------------------|-----------------------|---------------------|---------------------|----------------------|-----------------|------------------|
| <input checked="" type="radio"/> | <a href="#">+ Show</a> | WSF - Buy / Sell | 450115                | Aloha El Cert - Buy | Pending Input       | Aloha Elem (XXX)     | Admin, Chap     | 03/22/2012       |



## Screen Overview

The eHR WSF Position Buy/Sell process has several screens: the **Buy Sell Positions List**, **Buy/Sell Process**, **Create Position**, and **Process Position** screens. The screens differ in appearance, but the basic functions and actions available are similar. The navigational aids (A, B below) are repeated at the top of each screen.

The screenshot shows the eHR interface for the State of Hawaii Department of Education. At the top, there is a navigation bar with the eHR logo, user information (Instance: HRDEV1, Module: Processes, Home, Help, Logout, Logged in: Chap Admin), and a menu bar with options like Pending Cases, Current Case, Start Process, Current Employee List, and Current Position List. Below this is a breadcrumb trail: Buy Sell Positions List > Buy Certified Positions - Aloha Elem (XXX) - Case 450115: Aloha EI Cert - Buy. A status bar shows 'Status: Pending Input' with a 'Submit' button and a 'More' link. A filter section allows filtering by 'Posn No' with a 'Go' button and an 'Advanced Search' link. A 'Print Buy Sell Position List Report' button is also present. The main content area shows a table of position details for a selected position (Posn No: 12345, Title: Elem Teacher, FTE: 1.000, Posn Eff Dt: 07/28/2009, Posn Seq No: 0, Status: Active, PC: P, Reason: Update Position, DOE ID: 00000000, Name: Doe, John, Employee Status: Active, Ap Ty: F1, Emp Fte Am: 1.000). Below the table, there are sections for 'Administrative Location', 'Office Location', 'Job Class ID', 'HR Category', 'HR Sub Category', and 'Bargaining Unit'. A 'Position Funds' table is also visible, showing details for the selected position's funding.

- A** Aids that allow you to navigate throughout the eHR system.
- B** View menu bar that allows you to navigate to the Buy Sell Positions List screen.
- C** Title for the current WSF Buy/Sell Process Case.
- D** Indicates the status of the current Process Case and allows the user to take action on the current Process Case. The actions available to you are dependent upon your system authorization.
- E** Aid that allows you to filter by various position parameters to locate a specific position, or selection of positions, within the Buy Sell Positions List.
- F** Creates a pdf version of the Buy/Sell request form. This report should be run after the request has been approved and completed for posting (takes the place of the former WSF-1 form).
- G** Brings up a screen showing the position details for the position selected.
- H** List of positions that can be bought or sold.



## BUY REQUESTS

### Buy/Sell Position List

Description: Definitions for the position actions and expanded views available in the Buy/Sell Position List screen for **BUY** requests.

**Buy Position Actions** – Creates a request to buy a position.

|   | Title                       | Description  |
|---|-----------------------------|--|
| A | Buy New Position            | Buy a brand new WSF funded position.   |
| B | Buy FTE                     | Increase the FTE count of an existing, WSF funded position that is less than 1.00 FTE.   |
| C | Buy Existing Posn not on FP | Fund an existing, established position that may have inadvertently been left off your Financial Plan.<br>OR<br>To change the funding for a NON-WSF position to WSF Funded (i.e. changing a Title I position to WSF). |
| D | Convert 10 to 12 Month      | Convert an existing 10-month position, WSF Funded position to a 12-month position.   |

**View Options** – Checking one or more of these boxes will expand the Buy/Sell positions list for positions not shown by default.

|   | Title                        | Description   |
|---|------------------------------|---|
| E | Show All 10-Month Positions? | Expands the list to include all 10-month, WSF funded positions (primarily used to BUY Existing Posn not on FP or Convert 10 to 12 Month). |
| F | Show Abolished?              | Expands the list to include all abolished, WSF funded positions (primarily used to BUY Existing Posn not on FP).                          |
| G | Show Non-WSF?                | Expands the list to include non-WSF funded positions (primarily used to BUY Existing Posn not on FP).                                     |



**Buy/Sell Process**

Description: Defines the information required when requesting a **BUY**.

**Details of Position** – Information related to the position in the buy request.

A

| Title  | Description   |
|--|---|
| Position Number  | Displays either existing position number, or temporary “NP” number assigned to a new position. An official position number will be assigned by OHR when the request is completed. |
| Administrative Location / Office Location  | Refers to the location of the position. For schools, these locations will be the same.  |
| Object of Expenditure  | Object code for the position title you wish to buy or increase.   |
| Job Class ID   | Corresponding Job Class code for the position you wish to buy or increase.  |
| Position Title<br>HR Category<br>HR Sub Category<br>Bargaining Unit<br>Salary Plan<br>Salary Range<br>UAC Obj Code | Additional information corresponding to the type of position you wish to buy or increase. Most information provided is for OHR use / information.                                 |

**Details of Buy Request** – Information required in order to complete the buy request.

B

| Title  | Description   |
|--|---|
| FTE<br>(for Buy FTE:<br>Current FTE and<br>Ending FTE) | The FTE count of the position you wish to buy or increase.  |
| Track  | If a multi-track school, the track the position will be placed in.  |
| Effective Date   | The effective start date of the request (the effective date of the establishment of the position).          |
| Buy/Sell Cost Amount                                   | The pro-rated cost amount for the position you are buying or increasing, based on the effective start date. |
| Buy/Sell Rationale                                     | Brief explanation of why you are requesting to buy or increase the position.                                |



## Requesting to Buy a New Position

**Description:** How to enter a request to buy a new position.

- A** 1. Click the **Buy New Position** button.
- B** 2. Enter the **Object of Expenditure**, using look up feature (flashlight), if necessary.
3. If **Job Class ID** is not automatically filled in, enter Job Class ID.
  - NOTE: Job Class (position level) of actual established position may differ from the code entered. OHR will use its discretion to establish the necessary position.
4. Enter the **FTE** count.
  - Certificated positions can be established as 0.50 FTE or 1.00 FTE.
  - Classified positions may be established in increments of 0.125 FTE.
5. For multi-track schools, enter the **Track** for the requested position.
6. Enter the **Effective Start Date** for the position. This will be the date that the position will be available to fill.
  - For Certificated positions, effective date defaults to 10 days from the current date.
  - For Classified positions, effective date defaults to 15 days from current date.
  - Effective Date may be edited to an earlier or later date as needed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
7. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date used.
8. Enter the **Buy/Sell Rationale**; the reason for requesting the position.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** and **Create Position** screens.
- C** 9. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue** you will be unable to change the object or job class codes, effective date, or FTE.
- D** 10. You will be directed to the **Create Position** screen. Click on the **Save Changes** button.



### Requesting to Buy FTE (increase FTE for existing position)

**Description:** How to enter a request to increase the FTE of an existing position.

1. Select the position you wish to increase from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
2. Click the **Buy FTE** button.
3. The **Current FTE** field will show the existing position FTE. Select the desired resulting position FTE from the dropdown list in the **Ending FTE** field.
  - Certificated positions can be increased from 0.50 FTE to 1.00 FTE.
  - Classified positions may be increased in increments of 0.125 FTE.
4. Enter the **Effective Start Date** for the increase.
  - For Certificated positions, effective date defaults to 10 days from the current date.
  - For Classified positions, effective date defaults to 15 days from current date.
  - Effective Date may be edited to an earlier or later date as needed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
5. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date entered and FTE increase.
6. Enter the **Buy/Sell Rationale**; the reason for requesting the increase.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** screen.
7. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue**, you will be unable to change the effective date or FTE.
8. You will be directed to the **Process Position** screen. Click on the **Save Changes** button.
9. Screen will refresh and indicate "Transaction completed successfully!". Click on **Back** to return to the **Buy Sell Positions List** screen.



### Requesting to Buy Existing Posn not on FP

Description: How to enter a request to fund an existing, established position inadvertently left off the approved Financial Plan.

The screenshot shows the 'Buy Existing Posn not on FP' screen. The 'Buy/Sell Process' form contains the following information:

- Position Number: 12345
- Administrative Location: Aloha Elem
- Office Location: Aloha Elem
- Object of Expenditure: 2209
- Job Class: 09342
- Position Title: School Custodian II
- HR Category: Classified Personnel
- HR Sub Category: Civil Service
- Bargaining Unit: 01
- UAC Object Code: 2000
- FTE: 0.500
- Track: DOE (2011-2012)
- Effective Date: 07/01/2012
- Buy/Sell Cost Amount: 16,952
- Buy/Sell Rationale: Enter Buy/Sell Rationale here.

The 'Continue' button is highlighted with a yellow circle 'C'. The 'Save Changes' button on the 'Process Position' screen is highlighted with a yellow circle 'D'.

1. Select the position you wish to fund from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
  - You may need to check one or more of the expanded view boxes to find the position.
2. Click the **Buy Existing Posn not on FP** button.
3. Enter the **Effective Start Date** for the position.
  - For Certificated positions, effective date defaults to 10 days from the current date.
  - For Classified positions, effective date defaults to 15 days from current date.
  - Effective Date may be edited to an earlier or later date as needed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
4. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date entered and FTE increase.
5. Enter the **Buy/Sell Rationale**; the reason for requesting the position.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** screen.
6. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue** you will be unable to change the effective date.
7. You will be directed to the **Process Position** screen. Click on the **Save Changes** button.
8. Screen will refresh and indicate "Transaction completed successfully!". Click on **Back** to return to the **Buy Sell Positions List** screen.



## Requesting to Convert 10 to 12 Month

Description: How to convert a 10-month position to a 12-month position.

1. Select the WSF position you wish to convert from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
  - You may need to check the “Show All 10-Mo Posns?” expanded view box to find the position.
  - **IMPORTANT NOTE:** Only multi-track schools can convert 10-month Vice Principals or 10-month Educational Assistants to 12-month positions.
2. Click the **Convert 10 to 12 Month** button.
3. Enter the **Object of Expenditure**, using look up feature (flashlight), if necessary.
4. If **Job Class ID** is not automatically filled in, enter Job Class ID.
  - NOTE: Job Class (position level) of actual established position may differ from the code entered. OHR will use its discretion to establish the necessary position.
5. Enter the **Effective Start Date** for the conversion.
  - For Certificated positions, effective date defaults to 10 days from the current date.
  - For Classified positions, effective date defaults to 15 days from current date.
  - Effective Date may be edited to an earlier or later date as needed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
6. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date entered.
7. Enter the **Buy/Sell Rationale**; the reason for requesting the conversion.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** screen.
8. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue** you will be unable to change the effective date.
9. You will be directed to the **Process Position** screen. Click on the **Save Changes** button.
10. Screen will refresh and indicate “Transaction completed successfully!”. Click on **Back** to return to the **Buy Sell Positions List** screen.





## Modifying a Buy Request

Description: How to modify a pending buy request.

Important Notes: Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.

**B** Position Details Buy FTE Buy Existing Posn not on FP Convert 10 to 12 Month Show All 10-Mo Posns? Show Abolished? Show Non-WSF?

| Select                           | Details | Buy/Sell Cost Amount | Posn No | Tk No | Position Title | FTE   | Posn Eff Dt | Posn Seq No | Posn Status     | PC | Reason       | DOE ID | Name | Employee Status | Ap Ty | Emp Fte Am |
|----------------------------------|---------|----------------------|---------|-------|----------------|-------|-------------|-------------|-----------------|----|--------------|--------|------|-----------------|-------|------------|
| <input checked="" type="radio"/> | Show    | 29,313               | NP4683  | 0     | Clerk I        | 1.000 | 07/01/2011  | 0           | Active - Bought | T  | Buy Position |        |      |                 |       |            |

**A** **C**

**D**

The row data will be deleted permanently if you proceed. Are you sure you want to continue?

**D** OK Cancel

**E** Back Save Changes

Return to WSF Buy Sell Positions >

Information  
JHS-00100: Transaction completed successfully!

- A** 1. Select the pending position you wish to modify from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
  - Any pending position buys will be at the top of the list, in red.
- B** 2. Click the **Position Details** button. This will navigate you to the **Process Position** screen.
3. In the list of **Current Position Actions** locate the row with the pending buy request.
  - Actions are sorted in descending order by date (most recent first).
  - Typically, the buy request will be the first entry
  - In the **Reason** column, it will say **Buy Position** or **Buy FTE**.
- C** 4. Select the pending request by clicking on the radio button next to the action.
- D** 5. Click on **Delete Row**.
  - You will be warned that the “row data will be deleted permanently.” If you are sure you wish to continue, select **OK**.
- E** 6. Screen will refresh and indicate “Transaction completed successfully!”. Click on **Back** to return to the **Buy Sell Positions List** screen.

**IMPORTANT NOTE:** This action will delete the selected buy request. Use this method to change or correct the Object or Job Class code, effective date or FTE of a pending request by deleting the current request row and re-entering the request with the correct information.



### TIPS for Buy Requests

Multiple BUY requests may be created / submitted within a single case, as long as the positions requested are in the same HR Category (Certificated or Classified).

For example, within a single Certificated BUY case, you may request to:

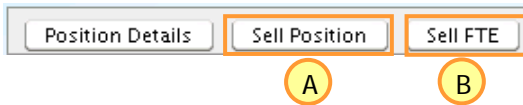
- buy a new 1.00 FTE;
- buy a new 0.50 FTE;
- increase an existing 0.50 FTE to 1.00 FTE; AND
- convert an existing 1.00 FTE 10-month position to a 12-month position



## SELL REQUESTS

### Buy/Sell Position List

Description: Definitions for the position actions available in the Buy/Sell Position List screen for **SELL** Requests.



**Buy Position Actions** – Creates a request to sell a position.

|   | Title         | Description   |
|---|---------------|---|
| A | Sell Position | Sell an entire VACANT, WSF funded position.                                   |
| B | Sell FTE      | Decrease the FTE count of an existing, WSF funded <b>Classified</b> position. |



### Buy/Sell Process

Description: Defines the information required when requesting a **SELL**.

**Details of Position** – Information related to the position in the sell request.

A

| Title   | Description  |
|---|--|
| Position Number   | The position number you have selected to sell.   |
| Administrative Location / Office Location   | The location of the position. For schools, these locations will be the same.               |
| Position Title<br>HR Category<br>HR Sub Category<br>Bargaining Unit<br>UAC Obj Code | Additional information corresponding to the type of position you wish to sell or decrease. |

**Details of Sell Request** – Information required in order to complete the sell request.

B

| Title  | Description  |
|--|--|
| FTE<br>(for Sell FTE:<br>From FTE and To<br>FTE) | The FTE count of the position you wish to buy or decrease.   |
| Track  | If a multi-track school, the track the position is in.   |
| Effective Date                                   | The effective start date of the request (the date the position will no longer active).                       |
| Buy/Sell Cost Amount                             | The pro-rated cost amount for the position you are selling or decreasing, based on the effective start date. |
| Buy/Sell Rationale                               | Brief explanation of why you are requesting to sell or decrease the position.                                |



## Requesting to Sell a Position

Description: How to enter a request to sell a position.

1. Select the position you wish to sell from the **Buy Sell Positions List** screen by clicking on the radio button next to the position
- A** 2. Click the **Sell Position** button.
- B** 3. Enter the **Effective Start Date** for the position. This is the date that the position will be inactivated.
  - For Certificated and Classified positions, effective date defaults to the current date.
  - Effective Date may be edited to later date as needed.
  - Retro sells (backdating of requests) are **NOT** allowed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
4. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date used.
5. Enter the **Buy/Sell Rationale**; the reason for selling the position.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** screen.
- C** 6. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue** you will be unable to change the effective date.
- D** 7. You will be directed to the **Process Position** screen. Click on the **Save Changes** button.
8. Screen will refresh and indicate "Transaction completed successfully!". Click on **Back** to return to the **Buy Sell Positions List** screen.



**NOTE:** To request to decrease a **CERTIFICATED** position, please contact your PRO. They will split the existing certificated position and provide a new position number to sell.

**Requesting to Sell FTE (decrease FTE for existing position; for CLASSIFIED position only)**

Description: How to enter a request to decrease the FTE of an existing, CLASSIFIED position.

1. Select the position you wish to decrease from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
- A** 2. Click the **Sell FTE** button.
- B** 3. The **Current FTE** field will show the existing position FTE. Select the desired resulting position FTE from the dropdown list in the **Ending FTE** field.
  - Classified positions may be decreased in increments of 0.125 FTE.
4. Enter the **Effective Start Date** for the decrease.
  - For Certificated and Classified positions, effective date defaults to the current date.
  - Effective Date may be edited to a later date as needed.
  - Retro sells (backdating of requests) are **NOT** allowed.
  - Actual Effective Date may be changed by OHR to accommodate processing times.
5. The **Buy/Sell Cost Amount** will calculate the pro-rated cost based on the effective date entered and FTE decrease.
6. Enter the **Buy/Sell Rationale**; the reason for requesting the decrease.
  - This field is **REQUIRED**. You will be unable to submit your request if this field is not completed.
  - If necessary, you may edit / amend this field on the **Process Position** screen.
- C** 9. Click on the **Continue** button, located under the Rationale field.
  - **IMPORTANT NOTE:** Once you click on **Continue** you will be unable to change the effective date or FTE.
- D** 7. You will be directed to the **Process Position** screen. Click on the **Save Changes** button.
8. Screen will refresh and indicate "Transaction completed successfully!". Click on **Back** to return to the **Buy Sell Positions List** screen.



## Modifying a Sell Request

Description: How to modify a pending sell request.

Important Notes: Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.

**B** Position Details Sell Position

| Select                           | Details | Buy/Sell Cost Amount | Posn No | Tk No | Position Title | FTE   | Posn Eff Dt | Posn Seq No | Posn Status     | PC | Reason        | DOE ID | Name | Employee Status | Ap Ty | Emp Fte Am |
|----------------------------------|---------|----------------------|---------|-------|----------------|-------|-------------|-------------|-----------------|----|---------------|--------|------|-----------------|-------|------------|
| <input checked="" type="radio"/> | Show    | -17,216              | NP4679  | 0     | Elem Teacher   | 1.000 | 04/03/2012  | 1           | Inactive - Sold | T  | Sell Position |        |      |                 |       |            |

**A**

**D** Process Position

Position Number: NP4679

Show Audit Info

Current Position Action:

| Select                           | Position Number | * Eff Dt   | * Eff Seq | * Action        | * Reason      | HR Action Status  | Process Case Step Key |
|----------------------------------|-----------------|------------|-----------|-----------------|---------------|-------------------|-----------------------|
| <input checked="" type="radio"/> | NP4679          | 04/03/2012 | 1         | Update Position | Sell Position | Pending Submittal | 459753                |

**C**

**D** Delete Row Show Audit Info

The row data will be deleted permanently if you proceed. Are you sure you want to continue?

**D** OK Cancel

**E** Back Save Changes

Return to WSF Buy Sell Positions >

Information

JHS-00100: Transaction completed successfully!

- A** 1. Select the pending position sell you wish to modify from the **Buy Sell Positions List** screen by clicking on the radio button next to the position.
  - Any pending position sells will be at the top of the list, in red.
- B** 2. Click the **Position Details** button. This will navigate you to the **Process Position** screen.
3. In the list of **Current Position Actions** locate the pending sell request.
  - Actions are sorted in descending order by date (most recent first).
  - Typically, the sell request will be the first entry
  - In the **Reason** column, it will say **Sell Position** or **Sell FTE**.
- C** 4. Select the pending request by clicking on the radio button next to the action.
- D** 5. Click on **Delete Row**.
  - You will be warned that the “row data will be deleted permanently.” If you are sure you wish to continue, select **OK**.
- E** 6. Screen will refresh and indicate “Transaction completed successfully!”. Click on **Back** to return to the **Buy Sell Positions List** screen.

**IMPORTANT NOTE:** This action will delete the selected sell request. Use this method to change or correct the Object or Job Class code, effective date or FTE of a pending request by deleting the current request row and re-entering the request with the correct information.



### TIPS for Sell Requests

Multiple SELL requests may be created / submitted within a single case, as long as the positions requested are in the same HR Category (Certificated or Classified).

For example, within a single Classified SELL case, you may request to:

- sell a vacant 1.00 FTE;
- sell a vacant 0.50 FTE; AND
- decrease an existing, vacant 1.00 FTE to 0.50 FTE





## Special Cases (Sells)

Retro (back-dated) sell requests are **NOT** allowed. However, there are a few special cases where an exception may be made. These are the **ONLY** accepted exceptions to the “no retro dated sell requests” rule.

### Timing Issue for Recently Vacated Positions

There is a known timing issue in the Position Buy/Sell Process in eHR. There may be instances when a position is reflecting as vacant in the current position information (school list), but the Buy/Sell process does not recognize that position as being vacant yet. These instances may straddle a weekend, lowering the cost of a position by the time the position shows as vacant for the Buy/Sell process.

To avoid penalizing the school for this timing issue, Budget and OHR will allow for requested changes to the effective date of the sell request, of no more than 7 days prior to date of request. The following steps should be taken by the requestor:

- School / User enters request to sell position in eHR, but position is not available to sell
- School confirms position is vacant (contact PRO if needed)
- School / User re-enters request to sell position in eHR within 7 days, position is now available to sell  
**NOTE: School / User MUST include, in rationale, that effective date of sell should be changed to date position was vacated (include date)**
- OHR will modify the effective date of the sell request, as long as the change is within the 7 day window, and finalize processing.

#### Example 1:

Position 12345 becomes vacant on Friday, 10/21 (1.00 FTE Teacher, cost = \$43,016). School starts sell request in eHR, but position is not reflected as available to sell (not vacant). School confirms with PRO that position is vacant. On Monday, 10/24, school starts new sell request. Position is now available to sell, but the amount has decreased to \$41,941. School includes in the rationale for the request, “Position became vacant on 10/21. Please amend effective date to 10/21.” OHR-CCG will verify date and amend effective date and amount as needed.

#### Example 2:

Position 54321 became vacant on Friday, 10/21 (1.00 FTE Teacher, cost = \$43,016). On Wednesday, 11/16, school starts sell request in eHR (cost is now \$38,716). School includes in the rationale for the request, “Position became vacant on 10/21. Please amend effective date to 10/21.” OHR-CCG will **NOT** amend effective date and amount since the request was submitted more than 7 days after the position became vacant. Effective date will remain 11/16.



### Correcting the funding source of an existing WSF position

If a school needs to correct the funding source of an existing WSF funded position (for instance, correcting the funding source of a Teacher or EA position from WSF to Title I), as of a prior date, please contact your PRO for assistance and further instructions.

#### NOTES:

- PRO / OHR will complete any needed transfers of positions and/or incumbents prior to school / user entering request in eHR.
- When entering the sell case in eHR, ***school / user MUST include the effective date of the funding source change in the rationale***
- School must monitor payroll reports. When payroll expenditures for the position stop posting to the WSF Prog ID, school submits an AC-4 to Accounting Section to transfer all YTD expenditures for the position to the CORRECT funding source (Prog ID).
- School sends copy of COMPLETED AC-4 to OHR-CCG as confirmation that all charges associated with position being sold have been transferred to the correct program.
- OHR will modify the effective date of the sell request and finalize processing.

OHR-CCG will NOT amend the effective date of the sell request without a copy of the completed AC-4. If the completed AC-4 is not received by the time the Position Buy/Sell process closes for the year, the sell request will be completed with the original effective date as submitted.



## Submitting a WSF Buy/Sell Request

Description: How to submit your WSF Buy/Sell Request.

Important Notes: Once the WSF Buy/Sell case is submitted, changes cannot be made unless the CAS returns the request to you for modifications.

1. From the **Select Action** column dropdown, select **Submit**.
  - The **Select Action** dropdown menu is located next to the **Status** field.
  - **If you choose Cancel Process it will permanently delete the entire WSF Position Buy/Sell Case and you must start over.**
2. **Enter comments** for your CAS in the box next to Submit. Click on **More** for additional space for comments.
3. Click **Go**.

Status: Pending Submittal

|                |   |    |
|----------------|---|----|
| Select Action  | ▼ | Go |
| Select Action  |   |    |
| Cancel Process |   |    |
| Save Only      |   |    |
| Submit         |   |    |



## Checking the Status of a WSF Buy/Sell Request

Description: How to check the status of a WSF Buy/Sell Request.

- A** 1. Under **Module** dropdown, select **Processes**.
- B** 2. Click on the **Pending Cases** tab. Click on the “Show All Cases” checkbox if you don’t see the desired WSF Position Buy/Sell Case.
3. Click on **+Show** icon for the desired WSF Position Buy/Sell case.

In the example below, the **Approval Step History** shows that the WSF Buy/Sell Request was submitted by the Principal, Returned by the CAS, Resubmitted by the Principal, Approved by the CAS, then Completed by OHR. Click on **Next Approval Step** to see what is required next.

Click on **Parameters** to see what parameters were submitted for the Case.

Example:

The screenshot shows the eHR system interface. At the top, the 'Module' dropdown is set to 'Processes' (marked with A). Below it, the 'Pending Cases' tab is selected (marked with B). The 'Pending Cases' section shows a table with one entry: 'WSF - Buy / Sell' with a status of 'Approved'. Below the table, the 'Approval Step History' is displayed, showing a sequence of 5 steps: 1. Submit (Principal), 2. Return (CAS), 3. Re-submit (Principal), 4. Approve (CAS), 5. Approve (OHR).

| Select                | Details                       | Task Description | Process Case Step Key | Process Case Label  | Process Step Status | Location Description | Last Updated By | Last Update Date |
|-----------------------|-------------------------------|------------------|-----------------------|---------------------|---------------------|----------------------|-----------------|------------------|
| <input type="radio"/> | <input type="checkbox"/> Hide | WSF - Buy / Sell | 459748                | Aloha EI Cert - Buy | Approved            | Aloha EI (xxx)       | OHR             | 04/03/2012       |

Received From: OHR      Process ID: 6.1.3.1      District: Central District (20)  
 Received Date: 04/03/2012      Process Begin Date: 04/03/12

| Task Description | Approval Step Sequence Number | Approval Step Number | Comment | Process Date | Task Action Code | Comment  | Update By |
|------------------|-------------------------------|----------------------|---------|--------------|------------------|--|-----------|
| WSF - Buy / Sell | 1                             | 10                   |         | 04/03/2012   | Submit           | Submitting requesting for buying a new teacher position... | Principal |
| WSF - Buy / Sell | 2                             | 20                   |         | 04/03/2012   | Return           | Returning...   | CAS       |
| WSF - Buy / Sell | 3                             | 10                   |         | 04/03/2012   | Re-submit        | Re-submitting...   | Principal |
| WSF - Buy / Sell | 4                             | 20                   |         | 04/03/2012   | Approve          | Approving...   | CAS       |
| WSF - Buy / Sell | 5                             | 30                   |         | 04/03/2012   | Approve          | Completing...  | OHR       |



### Returning a WSF Buy/Sell Request (For CAS Use Only)

Description: How to Return a WSF Buy/Sell Request back to the Principal or CABM.

Important Notes: After the WSF Buy/Sell Request is submitted by the Principal, changes cannot be made unless the CAS returns the request for modifications.

- From the **Select Action** column dropdown, select **Return**.
  - The **Select Action** dropdown menu is located next to the **Status** field.
- From the **Return To** column dropdown, select the Principal's or CABM's name.
- Enter comments** for the Principal or CABM in the box next to Return. Click on **More** for additional space for comments.
- Click **Go**.

Status: In Progress Submit by Principal

Return Return To: Principal

Please modify per our discussion... More Go

### Approving a WSF Buy/Sell Request (For CAS Use Only)

Description: These instructions illustrate how to Approve a WSF Buy/Sell Request.

Important Notes: Once the WSF Buy/Sell Request is approved by the CAS, any changes need to be discussed with your PRO. A subsequent request may need to be submitted.

- From the **Select Action** column dropdown, select **Approve**.
  - The **Select Action** dropdown menu is located next to the **Status** field.
- Enter comments** in the box next to Approve. Click on **More** for additional space for comments.
- Click **Go**.

Status: In Progress Submit by Principal, Chap

Select Action Go

Select Action  
Approve  
Return



## Process Flow Email

**Description:** These instructions illustrate how to find a Buy/Sell Case in eHR using the Process Flow Email.

1. After OHR has approved a Buy/Sell case, you will receive a Lotus Notes email similar to the one shown below. The Lotus Notes provides you with the basic information about the case:

- A** Process Case label name - Indicates if it is a Certificated or Classified / Buy or Sell
- B** Location Description - Indicates School/Complex Area related to the case
- C** Case status - "Approve" indicates case has been approved by OHR
- D** Process Case Step Key – Unique ID used to identify a case. Use to look up a case in eHR.

**Process Flow Email for - Aloha Elem Cert-Sell(62631) at location - Aloha Elem(XXX)**

Aloha John,

You are one of the task approvers and/or informees of - "WSF Buy / Sell" Process Case.

The process case details are as follows.

Process Case **A** : Aloha Elem Cert-Sell(12345) at location **B** - Aloha Elem(XXX)  
Task : WSF Buy / Sell(PCBSCHBUYSEL)  
Task Action : Approve **C**  
Action Comments :  
Process Case Step Key : 123456 **D**

For buy/sell cases:

- Contact your Personnel Regional Officer to fill new positions.
- Please print report of the completed buy or sell transaction and post on the School Bulletin Board for 30 days.

Mahalo!

E\_TASK\_ACTN



2. Use the Process Case Step Key number to find the case in eHR.

- A Under **Module** dropdown, select **Processes**.
- B Click on **Pending Cases** tab
- C Select **Process Case Step Key** from the 'Filter By' dropdown
- D Enter the Process Case Step Key number from the Lotus Notes you received. Click **Go**.
- E The case should appear. If the case does not appear, make sure that the "**Show All Cases**" check box is checked.
- F Click on **Go To Case**.

The screenshot shows the eHR interface for Pending Cases. At the top, the 'Module' dropdown is set to 'Processes' (A). The 'Pending Cases' tab is selected (B). Below the search bar, the 'Filter By' dropdown is set to 'Process Case Step Key' (C), and the number '123456' is entered in the search field (D). The 'Go' button is highlighted. Below the search bar, the 'Show All Cases' checkbox is checked (E). The 'Go To Case' button is highlighted (F). Below the search bar, there is a table with the following data:

| Select                   | Details              | Task Description | Process Case Step Key | Process Case Label   | Process Step Status | Location Description | Last Updated By | Last Update Date |
|--------------------------|----------------------|------------------|-----------------------|----------------------|---------------------|----------------------|-----------------|------------------|
| <input type="checkbox"/> | <a href="#">Show</a> | WSF Buy / Sell   | 123456                | Aloha Elem Cert-Sell | Approved            | Aloha EI (xxx)       | OHR             | 08/03/2012       |



## Buy Sell Reports

### Generating the Buy Sell Position List Report

The **Buy Sell Position List Report** allows you to produce a PDF report for the current buy/sell case. The report replicates the former WSF-1 Buy/Sell form, which is to be posted for 30 days.

As reports are run, they will appear in a new browser window. You may either choose to print the report, or save a copy of the PDF report on your computer for future reference and/or printing. To close the report, simply close the browser window containing the report. From the Reports screen you have the option of running additional reports or navigating to another screen.

Important Notes: Pop-up blockers need to be disabled for the eHR website. For assistance disabling pop-up blockers, refer to your internet browser's Help. If Adobe Acrobat Reader 6.0 or above is not installed, you will be prompted to install it. This is needed to view the PDF format for reports. For assistance downloading Adobe Acrobat Reader, click on the Help button.

Filter By

1. Enter the approved Buy/Sell Position Case (see **Logging Back into a WSF Buy/Sell Request** above).

**A** 2. Click on **Print Buy Sell Position List Report**.

3. The report will open as a pdf file in a new browser window/tab.

4. User may either Print or Save a copy of the pdf file.

Tip: If you are using Firefox as your Browser, select "Save Page As" from the File Menu to save using the default report name.

5. To exit report, close report viewer (Adobe) window.





## Buy Sell Log Report

The **Buy Sell Log Report** allows you to produce a PDF or Excel report for all cases (pending and completed) for a specific Org ID or all Orgs within a Complex Area.

When submitting a report case, you may select to **Stream Output to Screen** or **Save Output to DB**:

- Selecting **Stream Output to Screen** will create a download of the report immediately to your computer. The report will not be saved in the Reports Cases tab.
- Selecting **Save Output to DB** will save the report to the Reports Cases tab within eHR. You may then download the report at any time.

When the PDF reports are downloaded, they will appear in a new browser window. You may either choose to print the report, or save a copy of the PDF report on your computer for future reference and/or printing. To close the report, simply close the browser window containing the report.

As Excel reports are downloaded, you will be prompted to Open or Save the file. Choosing Open will open the report in Excel. You will be prompted to save the file upon exiting. Choosing Save will save the file to the location you specify on your computer. You may then open the file from that location.

Important Notes: Pop-up blockers need to be disabled for the eHR website. For assistance disabling pop-up blockers, refer to your internet browser's Help. If Adobe Acrobat Reader 6.0 or above is not installed, you will be prompted to install it. This is needed to view the PDF format for reports. For assistance downloading Adobe Acrobat Reader, click on the Help button.



**BuySell Log – PDF (for CABM and ASA use only)**

The screenshot shows the eHR system interface. At the top, the 'Module' dropdown menu is set to 'Reports' (A). Below this, the 'Run Reports' tab is selected (B). In the 'Reports' section, the 'Run Report' button is highlighted (C). The 'Process Case' section shows the 'Process Case Label' field containing 'Buy Sell Log Report for Aloha Elem' (D). The 'Parameters' table (E) contains the following data:

| Prompt Text             | Parameter Value                            |
|-------------------------|--|
| Location ID             | XXX Aloha Elem (XXX)                       |
| School Year             | 2012                                       |
| Buy Sell Fund Source Id | General - WSF                              |
| Report Output Type      | PDF (PDF - Adobe Portable Document Format) |
| Report Destination      | Save Output to DB                          |

The 'Submit Parameters' button (F) is located at the top right of the 'Process Case' section.

- A 1. Select **Reports** from the Module dropdown menu.
- B 2. Select **BuySell Log – PDF** from the **Run Reports** tab.
- C 3. Click **Run Report**.
- D 4. Enter a Process Case Label for the report.
- E 5. Enter the parameters for the report:
  - **Location ID:** School Org ID, or Complex Area Org ID. If Complex Area Org ID is selected, report will contain all requests for all schools within that Complex Area.
  - **School Year:** Enter current school year (i.e. the school year for SY2012-2013 is **2012**)
  - **Buy Sell Fund Source ID:** Select **General – WSF**
  - **Report Destination:** Select output to screen or DB
- F 6. Click **Submit Parameters**.
7. If you selected **Stream Output to Screen**, the report will open as a pdf file in a new browser window/tab.
  - User may either Print or Save a copy of the pdf file.  
Tip: If you are using Firefox as your Browser, select “Save Page As” from the File Menu to save using the default report name.
  - To exit report, close report viewer (Adobe) window.
8. If you selected **Save Output to DB**, the report will be saved in the Report Cases tab. You may download the report from here at any time.



**BuySell Log – XLS (for CABM and ASA use only)**

**Reports**

Report Category: Position Reports    Description: BuySell Log    Filter

Run Report

| Select                           | Details                | Report Category  | Description       |
|----------------------------------|------------------------|------------------|-------------------|
| <input checked="" type="radio"/> | <a href="#">+ Show</a> | Position Reports | BuySell Log - PDF |
| <input type="radio"/>            | <a href="#">+ Show</a> | Position Reports | BuySell Log - XLS |

**Process Case**

BuySell Log - XLS

\* Process Case Label: Buy Sell Log Report for Aloha Elem

Parameters

| Prompt Text             | Parameter Value                    |
|-------------------------|------------------------------------|
| Location ID             | XXX Aloha Elem (XXX)               |
| School Year             | 2012                               |
| Buy Sell Fund Source Id | General - WSF                      |
| Report Output Type      | XLS (XLS - Microsoft Excel Format) |
| Report Destination      | Save Output to DB                  |

- A** 1. Select **Reports** from the Module dropdown menu.
- B** 2. Select **BuySell Log – XLS** from the **Run Reports** tab.
- C** 3. Enter a Process Case Label for the report.
- D** 4. Click **Run Report**.
- E** 5. Enter the parameters for the report:
  - **Location ID:** School Org ID, or Complex Area Org ID. If Complex Area Org ID is selected, report will contain all requests for all schools within that Complex Area.
  - **School Year:** Enter current school year (i.e. the school year for SY2012-2013 is **2012**)
  - **Buy Sell Fund Source ID:** Select **General – WSF**
  - **Report Destination:** Select output to screen or DB
- F** 6. Click **Submit Parameters**.
7. If you selected **Stream Output to Screen**, you will be prompted to Save or Open the report file.
8. If you selected **Save Output to DB**, the report will be saved in the Report Cases tab. You may download the report from here at any time.



### Downloading a report saved to the DB

The screenshot shows the eHR system interface. At the top, there is a navigation bar with the eHR logo, the State of Hawaii Department of Education logo, and a 'Module Reports' dropdown menu. Below this is a 'Report Cases' tab. The main content area shows a table of reports with columns: Select, Details, Process Description, Report Case, Process Case Label, Begin Date, Report Status, Run By, and Document Image. A single report is listed: 'BuySell Log - PDF' with Report Case 'R412846' and a 'Download File' link.

- A** 1. If not in the Report Cases tab, select **Reports** from the Module dropdown menu, and then click on the **Reports Cases** tab.
2. Locate the report you wish to download
- B** 3. Click on **Download File**.
4. If the report is a PDF report, the report will open as a pdf file in a new browser window/tab.
  - User may either Print or Save a copy of the pdf file.  
Tip: If you are using Firefox as your Browser, select “Save Page As” from the File Menu to save using the default report name.
  - To exit report, close report viewer (Adobe) window.
5. If the report is an XLS report, a window will appear prompting you to open the spreadsheet or save the file. Save the file to your computer.



## Glossary

| Title                | Description   |
|----------------------|---|
| Module               | Different areas / functions in eHR.   |
| Process              | A Process is a task or series of tasks involving a workflow. The WSF Position Buy/Sell process, for example, may consist of starting, submitting and approving a WSF Buy or Sell Request.   |
| Case or Process Case | For each process that exists, a process case represents an instantiation of that process. For example, "WSF Buy Position" has been defined as a process. By creating a new case, the user will have created a unique process case for buying a WSF position. Case can be created per location per year. |
| Start Process        | Go to the "Start Process" screen to start a new WSF Position Buy/Sell Process Case.   |
| Pending Case         | Cases that require action by the user.  |
| Current Case         | The selected case.  |
| Continue             | Click on the "Continue" button from the Buy/Sell Process screen to save the current buy or sell request information and continue to the Process Position screen.  |
| Cancel               | Click on the "Cancel" button from the Buy/Sell Process screen to cancel the current buy or sell request and return to the Buy/Sell Positions List screen.   |
| Submit               | The user would select "Submit" from the Actions dropdown list to Submit the WSF Buy/Sell Request for approval.  |
| Re-submit            | The user would select "Re-submit" from the Actions dropdown list to Re-submit the WSF Buy/Sell Request for approval.  |
| Return               | The CAS would select "Return" from the Actions dropdown list to Return the WSF Buy/Sell Request to the Principal for modifications.   |
| Approve              | The CAS would select "Approve" from the Actions dropdown list to Approve the submitted WSF Buy/Sell Request.  |
| Cancel Process       | Select "Cancel Process" from the Actions dropdown list to <u>cancel the Process and <b><i>permanently delete the entire WSF Position Buy/Sell Case.</i></b></u>   |