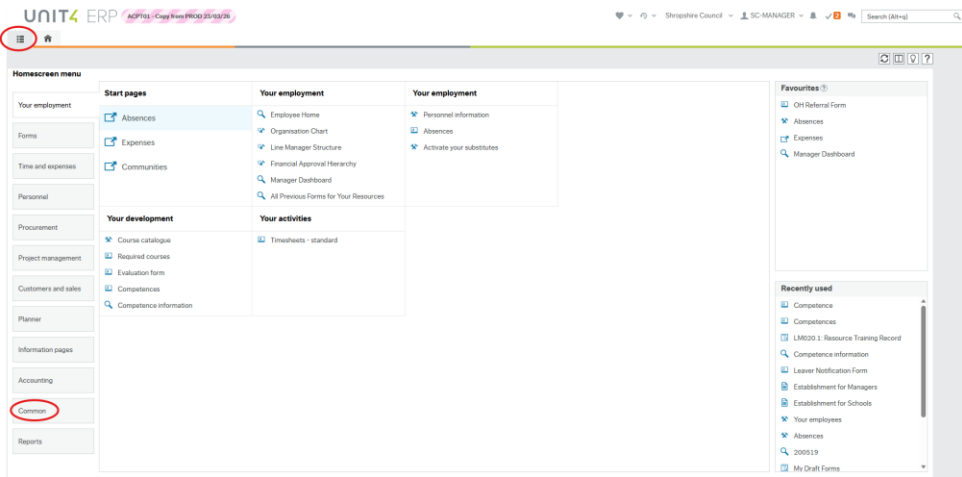
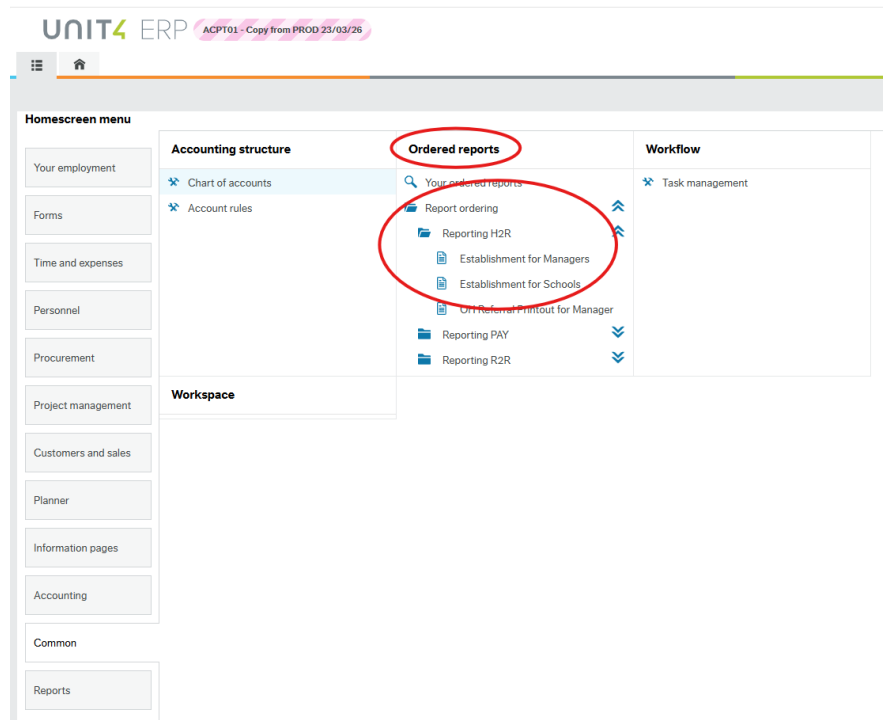


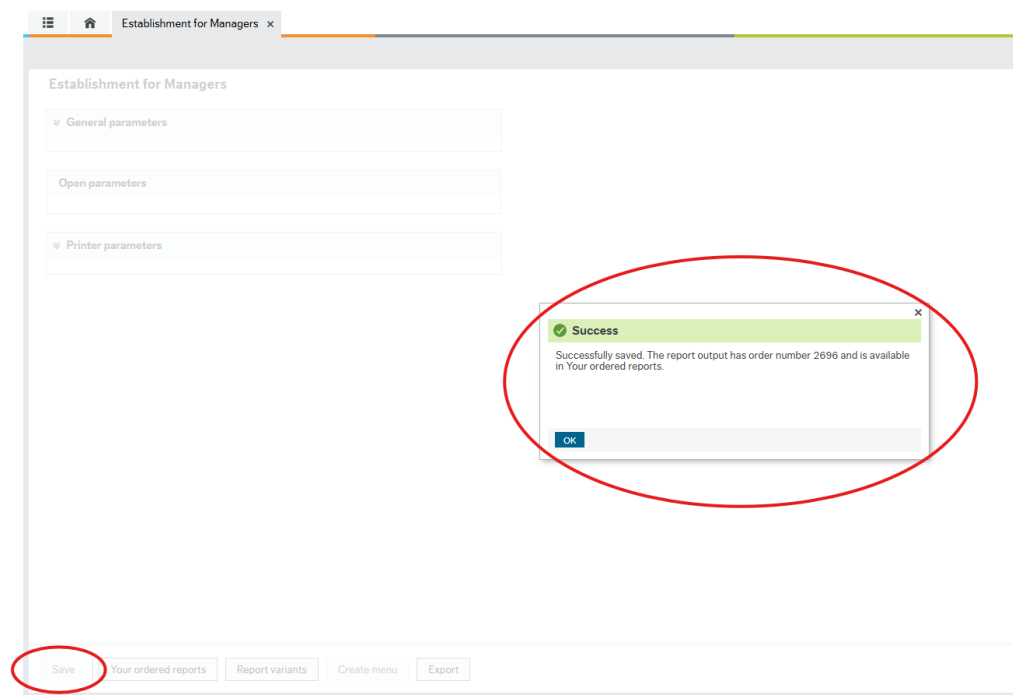
How to use the Establishment for Managers and Schools Report in the ERP

		Last Updated
1	Scope: This guidance is to show you how to use the Establishment for Managers and Establishment for Schools report.	27.07.2026
2	Introduction: The following guide provides information to the Managers, Headteachers, School Office Managers/Administrators or any delegated person to ensure they are familiar with the process of viewing your Team or School's Establishment in real time.	27.07.2026
3	Navigate to Main Menu → Common → Ordered reports → Report ordering → Reporting H2R → Establishment for Managers <i>or</i> Establishment for Schools	27.07.2026
4	Step by step process (<i>with videos and screenshots</i>)	
4.1	To run the establishment report, click on the Main Menu and Common. 	27.07.2026

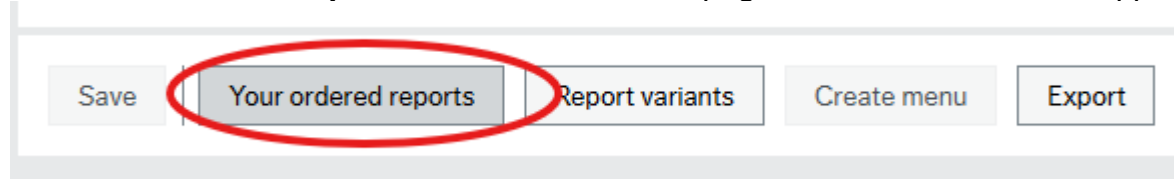
Navigate to **Establishment for Managers** or **Establishment for Schools** and click into the relevant report.



Click **Save** at the bottom of the page and a **Success** message will appear. Click **OK**.



Click **Your ordered reports** at the bottom of the page and a new screen will appear.



The report will show information as at the date you run the report. If you wish to change the date you can by using the calendar **From** and **To** options.

Your ordered reports

Scheduled

From  To 

Ordered report

☐ Show report 

Report ID	Order numb...	Scheduled	Co
P047B	2696	27/07/2026	27/07/2

July 2026

M	T	W	T	F	S	S
27		1	2	3	4	5
28	6	7	8	9	10	11
29	13	14	15	16	17	18
30	20	21	22	23	24	25
31	27	28	29	30	31	

Cancel

The **Status** will show as **Running** or **Finished**, to view the report it needs to show as **Finished**. If it shows as **Running**, click **Refresh**.

Your ordered reports

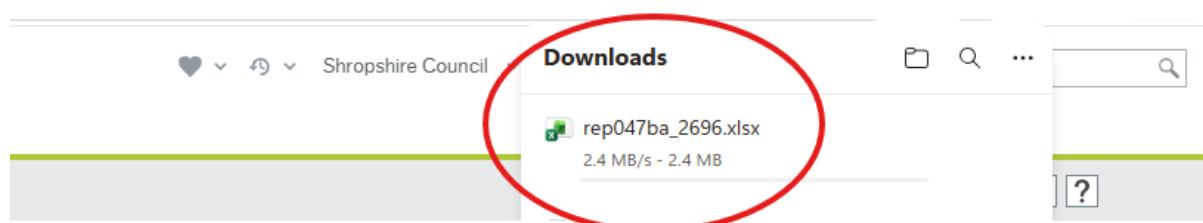
Scheduled

From To

Ordered reports

☐ Show report	User	Report name	Report ID	Order numb...	Scheduled	Completed	Server queue	File name	Status	Zoom	Show log
☐	200519	Establishmen...	REP047B	2696	27/07/2026	27/07/2026	DEFAULT	rep047ba_...	Finished		

When the icon under **Show report** is bold and status is **Finished**, the report is ready.
 Click the icon in the box and the report will download. The **Downloads** option should pop up in the top right of the screen for you to click into the Excel document.



Your establishment will open and you will see the following:

Corporate - Corporate only.

Directorate - Corporate only.

Division - Corporate only.

Cost Centre – Description and code.

Head Count – Total head count.

Employee Number – ERP resource ID.

Employee Name – List of all employee names for the cost centre.

Position Number – List of all the position ID numbers (post numbers) the employees hold within the team/school.

Position Description – Position titles they hold.

Job Family - This information helps ensure the correct job family is selected when setting up a new starter or a new position.

Pay Grade – Pay grade the Resource has for the position they hold.

Min Point and **Max Point** – The minimum and maximum point of the pay grade.

Post Fte Hours – Corporate and school support staff will all show as 37 hours and Teachers will show as 32.5 hours, these are the full time equivalent hours.

Position Weeks Per Year – Corporate and school support staff will show as 52.14 weeks, all teachers will show as 39 weeks. The actual weeks each employee is contracted for is shown at **Employment Work Year**.

Employee Contracted Hours – The weekly hours the employee is contracted for.

Occupant Type – The contract type (**Permanent, Fixed Term Contract** etc.)

Current Pay Step - Current spinal column point.

Resource Start Date - Start date at the Council.

Resource End Date - If a **Leaver Notification Form** has been processed for this employee, the date of leaving shows here otherwise it will be the **FTC** end date or 31/12/2099 for **Permanent** employees.

	Employment Start Date – Date the Resource started in that position. Employment Post End Date - If a Leaver Notification Form has been processed for this position, the date of leaving this position will show here otherwise it will be the FTC end date or 31/12/2099 for Permanent employees. Employment Work Year - The contracted weeks per year. Hourly Rate – Current Hourly Rate. Annual Salary – Current Annual Salary. Total TLR etc Value – Schools only. Position Reporting and Position Reporting Description – These fields are set up for ERP reporting purposes. Current Budget for Post – Corporate only for budget reporting. Budget Present for Post? - Corporate only for budget reporting.	
5	Related Video Links • How to use Reports in the ERP • How to use Reports under Common in the ERP • Establishment Report for Managers and Schools in the ERP	27.07.2026