Job Aid # 7

Single Step Transfer

Note: Only the users who have access to both source and target entities can perform single-step transfers.

1. Ensure that you can access the source and target entities (Department).
2. From “My Task List” click and open “Position Budget Preparation”.
3. Click and open “Manage Position and Employee Data”.
4. Click “Maintain Employees by Position”.
5. In the upper left hand dropdown box of the “Task List Status” window click the down arrow to search for the department in which the employee works. You can search by either the department title or department ID.

![Task List Status window]

6. Click on the department title and then click the symbol to fetch the data. Please note that in Hyperion the department IDs begin with a “D”.
7. Once the data has been loaded, search for the employee you wish to transfer.
8. Right click on the employee.
9. Select “Transfer Employee” and then select “Single Step Transfer”.
10. “Launch Confirmation Message” will appear click “Ok” if you would like to process the transfer.
11. Specify the following:
   a. Select Source Position – Employee’s current position.
   b. Select Source Entity – Department in which the employee is currently associated
   c. Select Target Position – Position to which to transfer the employee
   d. Select Target Entity – Department in which the employee is being transferred to
   e. Enter Effective Date – When the employee is transferred

![Transfer window]

12. Click on “Transfer”.
13. Once the action is complete, be sure to hit the “Save” icon on the top tool bar.