SUNGARD® K-12 EDUCATION

eFinancePLUS™

Position Control

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CONTENTS

1: System Overview

The eFinancePLUS Position Control System is an on-line interactive package designed to provide added capabilities to the other eFinancePLUS software you currently have installed. Powerful, yet easy to use, Position Control provides numerous features for planning, budgeting, and administering staffing levels. This chapter introduces the uses and requirements of the Position Control System.

Preview

Position Records: The Key to Position Control

The basic concept behind the Position Control System stems from how pay rates are categorized: by job classes. Employees within a class may perform similar but different duties and still share the same salary schedules, calendars, pay frequencies, and other records that determine pay amounts. All of these variables can be assigned to an employee's pay rate by referencing them through a job class record.

However, since employees in a class often work in different departments, locations, or programs and since staffing and budgeting are usually tied to these factors, Position Control introduces another type of record to further classify employees: Positions. By breaking down job classes into subcategories, Position records allow you to set occupancy limits, apply specific budget allocations, and further define accounting distribution charges for salaries.

Position Table

Positions are defined and stored in the Position table. Position records included the following data:

- Full-Time Equivalency units (FTE's). These units are used to determine the authorized, current, and default occupancy of a position.
- A location code identifying the position's building or site.
- Budgeted, actual, and projected salary information (full control only).
- Account numbers for distributing salaries in the Fund Accounting System.
- Highly Qualified Teacher data, including qualifications, certifications, requirements and degree information.
- Text notes regarding the position.

For additional information on the concepts behind position records, refer to Chapter 2, Position Table (page 14)

Batch Positions

Position records can also be created in the Batch Position Control table and then posted to the Position table. By processing these records in a batch table, you can add positions, make changes, and assign rates to employees without affecting your payroll records.

For additional information on batch position records, refer to Chapter 3, Batch Position Control (page 30).

Position Control Features

Position Control incorporates numerous features for enhancing the information management capabilities of the other eFinancePLUS products you use. In addition to interfacing with the software packages that make up the Human Resources System, Position Control is fully integrated with two other eFinancePLUS systems: Fund Accounting and Personnel Budgeting.

Building on the features of these systems, Position Control offers the following advantages:

- Enables you to determine recruitment needs, assign positions to employees, track position occupancy, and control budgeted costs.
- Requires minimal setup in that only one new component, position records, needs to be added to your existing records.
- Reduces training needs, since Position Control relies on the same basic skills as those used with other eFinancePLUS Systems.

This section summarizes Position Control's primary features.

General Features

- Uses a single integrated database to ensure the integrity of your records.
- Shares the same security system used by other eFinancePLUS software. This system enables you to restrict access to specified menu options and records on a user-by-user basis.
- Interfaces with the eFinancePLUS Human Resources, Personnel Budgeting, and Fund Accounting Systems. The connections between these systems ensure consistency while eliminating the need to enter redundant information.
- Provides drop-down lists and help pages for table-verified fields, so that you can quickly look up and select records while entering data.
- Enables you to access pages using folders, favorites, and keyboard shortcuts, depending on your preference.
- Allows you to keep multiple pages displayed for entering, looking up, and maintaining records.
- Produces a variety of reports that can be printed, stored, or reviewed on screen.

Position Control Features

- Supports either full control or tracking only. Full control prevents you from overfilling positions. Tracking allows overfilling, but the system warns you when a position's occupancy limits are exceeded.
- Lets you plan, monitor, and control staffing by location, department, program, function, or whatever criteria you decide on for structuring your positions.
- Allows creating positions within the job classes you currently maintain in Human Resources without requiring you to add positions for all classes.
- Enables you to assign positions directly to existing employee pay rates. You can also create positions and assign them to rates in a batch file to avoid affecting records used in payroll processing. At the appropriate time, you can post the batch records to your live database.
- Uses full-time equivalency percentages to monitor staffing levels and enforce budgetary limits. These values determine the portion of a full-time salary an employee receives and quantify the number of employees allowed within a position.
- Allows you to assign positions to employees using either Position Control options or Human Resources' pay rate pages.
- Allows you to mass update requirements, qualifications and certifications associated with selected positions.
- Shares verification tables with Human Resources, allowing the system to check the validity of the information you enter against existing records.

- Defaults the Fund Accounting distributions from employees' existing pay rates. If needed, you can also set up new distributions when creating positions.
- Offers the ability to track actual (to-date) and projected salaries. As you process pay runs, the system updates these amounts in your position records.
- Enables you to update budgeted salaries for individual positions as part of the Personnel Budgeting process.
- Maintains history files for tracking position activity. The system creates a history record whenever a position is assigned to or removed from an employee's pay rate.
- Lets you identify all employees who have a particular position assigned.
- Enables you to look up information on individual employees who have positions assigned.

Position Control Options

This section summarizes the Position Control System's main options, as well as options that can be used to generate reports and update employees' pay rates. For information on specific options, refer to the chapters listed.

Option Descriptions

The Position Control System includes the following options.

Position Control

Enables you to add, change, delete, and print records in Position Control's Position table.

Human Resources > Entry & Processing > Position Control > Position Control

Chapter 2, Position Table (page 14)

Batch Position Control

Enables you to assign positions to employees' pay rates in a batch file without affecting your Human Resources database. When you are ready to use the rates stored in file, you can post them to Human Resources.

Human Resources > Entry & Processing > Position Control > Batch Position Control

Chapter 3, Batch Position Control (page 30)

Mass Update Positions

Enables you to mass update the requirements, qualifications, and certifications associated with the selected positions.

Human Resources > Periodic Routines > Position Control > Mass Update Positions

Chapter 6, Highly Qualified Teacher Records (page 65)

Position Control Reports

Enable you to generate various reports on the records in your Position Control database.

Human Resources > Reports > Position Control

Chapter 5, Position Control Reports (page 57)

Employee Information

Part of Human Resources, this option enables you to assign positions directly to pay rates while either adding new employees or maintaining records for existing employees.

Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click **Occupants** on the Action Bar

Chapter 4, Position Occupancy (page 46)

Procedural Outline

This section summarizes the requirements and procedures of the Position Control System. You should familiarize yourself with these functions to gain a general understanding of the processes involved in creating and applying position records.

Do not attempt to run any of these procedures without first reviewing the relevant documentation. To assist you in finding additional information on the options mentioned, we will refer you to the appropriate chapters in this and other eFinancePLUS manuals.

Keep in mind that the options mentioned are not necessarily used in the order presented. In many cases, you can access pages and run processes in whatever order you choose.

Preview

The following sections outline the processes used in the Position Control System:

Preliminary Procedures

Before you can create position records, you need to check that certain settings and tables are in place in other eFinancePLUS Systems. Following are preliminary requirements for using Position Control. For complete information on these procedures, refer to the manuals listed.

1. Verify that you have the required security resources for accessing the options you need to use.

   Contact your system administrator for information on security.

2. Confirm that your Human Resources Profile is set up for Position Control. The Profile includes two fields of relevance:

Position Control	Indicates whether Position Control is in effect and if so, the level of control allowed. The field's settings include:	
	Y - Use Position Control (full control)	Prevents positions from being overfilled and also allows you to use Position Control's budgeting features.
	T - Tracking Mode	Allows you to overfill positions, but enables the system to issue a warning when you overfill a position. This setting does not allow budget monitoring.
	N - Do not use Position Control	Indicates Position Control is not installed (or you are not using it).
Rate & Position History	Determines whether Position Control should maintain history records on position activity. The field's checkbox must be selected to enable this feature.	

   These settings are usually entered as part of system implementation.

   For more information, refer to Human Resources Profile, System Administration Manual.

3. If you use full control and want to track cumulative salaries, you need to selecttheTrack Position Salary checkbox in pay codes. These records can be accessed through Human Resources' Pay Code Table option.

   For more information, refer to Payroll Tables, Human Resources Manual.

4. Verify that the Organization Chart, Account List, Project List (if used), and appropriate ledgers in the Fund Accounting System include the additional distribution codes you may need to set up positions within job classes.

   If you intend to retain the distributions currently used in job classes, no changes are required in Fund Accounting.

   For more information, refer to Reference Tables, Fund Accounting Manual.

5. Verify that Job Class and Location tables are set up in Human Resources. These tables contain records that apply directly to Position Control's Position table. You should also verify that other Human Resources tables are set up before attempting to use Position Control.

   For more information, refer to Payroll Tables and Personnel Tables, Human Resources Manual.

6. If you are tracking Highly Qualified Teachers, verify that the Personnel Tables used for Highly Qualified Teacher records are set up in Human Resources.

   For more information, refer to Personnel Tables, Human Resources Manual. Also refer to Highly Qualified Teacher Reference Tables (page 66).

Setup Procedures

Once you verify that all preliminary steps are completed, you can begin using Position Control's main options. Following are the general procedures for setting up position records and assigning rates to employees:

1. Use the Position Control folder's Position Control option to create a table of position records for job classes that are not assigned to employee pay rates.

   Prior setting up the Position table, you need to determine how you want to structure your positions, for example, by location, department, or other factors related to staffing and budgeting.

   For details, refer to Position Table (page 14).

2. Use the Batch Position Control option to perform the following functions:
   - Set up a batch table of positions for job classes that are assigned to employees' pay rates.
   - Assign batch positions to employee's pay rates.
   - Post the batch positions to Position Control's Position table and the pay rates to Human Resources' Pay Rates table.

   For details, refer to Batch Position Control (page 30).

   Note

   You can also use Personnel Budgeting's Position Control option to enter new positions and maintain records extracted from Position Control. For information on this option, refer to your Personnel Budgeting manual.

Ongoing Procedures

After you complete the setup procedures, you can begin using the Position Control System to track occupancy, assign additional rates, maintain position records, and monitor personnel costs. These and other functions tied to Position Control also interact with processes in Human Resources, Personnel Budgeting, and Fund Accounting.

Following is a brief outline of the position-related procedures used on an ongoing basis in Position Control and other eFinancePLUS Systems.

1. Create and update positions in Position Control's Position table to accommodate changes in your staffing needs.

   For details, refer to Position Table (page 14).

2. Create positions in Position Control's Batch Position table, and then post them to your live Position table.

   For details, refer to Batch Position Control (page 30).

3. Mass update the requirements, qualifications, and certifications associated with any positions for Highly Qualified Teachers tracking.

   For details, refer to Highly Qualified Teacher Records (page 65).

4. Assign positions to the pay rates of new and existing employees using the Employee Information option in Human Resources.

   For details, refer to Position Occupancy (page 46).

5. Assign positions to employees' pay rates using Position Control's Batch Position Control option, and then post the rates to your Human Resources database.

   For details, refer to Batch Position Control (page 30).

6. Assign and update positions in pay rates using Human Resources' Employee Information option.

   For details, refer to Changing Employee Records, Human Resources manual.

7. Vacate positions assigned to employees using the Terminate option in Human Resources' Employee Information page.

   For details, refer to Changing Employee Records, Human Resources manual.

8. Review, update, and print Position History records in Position Control.

   For details, refer to Position Table (page 14).

9. Delete Position History records using Position Control's Purge Position History option.

   For details, refer to Purge Position History Page (page 28).

10. Generate the following reports using the options on the Position Control Reports folder:

Batch Position Status Summary	Position Status Summary
Batch Position Status Detail	Position Budget Tracking
Position Status Detail	Vacant Position

    For details, refer to Position Control Reports.

11. Run the Payroll Encumbrance option during pay runs in Human Resources to update the Projected field in position records.

    For details, refer to Payroll Processing Procedures, Human Resources manual.

12. Use Human Resources' Fiscal Year End Processing option to zero out the Budget, Actual, and Projected fields in position records prior to running the first payroll in a new fiscal year.

    For details, refer to Periodic Processing, Human Resources manual.

13. Use Personnel Budgeting's Position Control option to update the Budget field in position records.

    For details, refer to Position Control, Personnel Budgeting manual.

14. Use Personnel Budgeting's Post to Position Control option to post full-time equivalency values to vacant positions and apply changes made to the positions' distribution charging.

    For details, refer to Post to Position Control, Personnel Budgeting manual.

2: Position Table

The Position table defines records that can be attached to employee pay rates to enable your district to track the occupancy of positions and distribute salaries in the Fund Accounting System.

Preview

Position Table Overview

Use the Position Control option to access the Position table for adding, changing, and deleting position records. These records contain the following data:

- The authorized, current, and default occupancy of a position, as expressed in full-time equivalency units (FTE's).
- A location code identifying the position's building or site.
- Text notes regarding the position.
- Budgeted, actual, and projected salary information (full control only).
- Account numbers for distributing salaries in the Fund Accounting System.
- Qualifications, certifications, requirements and degree information for Highly Qualified Teacher tracking.

Menu Path: Human Resources > Reports > Position Control

Understanding Position Records

Records in the Position table define the maximum occupancy of positions, allowing you to monitor and maintain staff levels as employees are hired and change positions. They also determine the distribution of salaries in Fund Accounting and assist in budgeting personnel costs.

The following sections cover the concepts and requirements associated with position records:

Setting Your Human Resources Profile

The Position Control setting in your Human Resources Profile offers three options, two of which enable you to control positions:

Y - Use Position Control (full control)	Prevents a position from being overfilled when you assign pay rates to employees in Human Resources. This option also tracks the salary expenditures budgeted for positions.
T - Tracking Mode	Allows positions to be overfilled. The system issues a warning when you exceed a position's occupancy limit, but it allows you to overfill the position. This option does not support budget tracking.
N - Do Not Use Position Control	Indicates that Position Control is not installed or you are not using it. You cannot use positions with this option.

Identifying Position Records

Two codes combine to identify an individual position record:

Job Class Codes	Codes defined in Human Resources' Job Class table. Job classes enable you to group employees who are in related positions that share the same salary schedule, calendar, pay code, pay method, pay group, deduction codes, and leave codes. You assign job classes to pay rates in Human Resources' Pay Rate Information page.
Position Codes	Codes defined in Position Control's Position table. these codes enable you to categorize employees within a job class, for example, by location or level. You can assign positions to pay rates that have job classes that are under Position Control.

Using Full-Time Equivalency Values (FTE's)

Position records use full-time equivalency (FTE) values to control positions. An FTE value represents the percentage of time an employee works relative to full time. A single FTE unit, then, is 100 percent, which is entered as 1.0. With this as the standard, the FTE value for a part-time position where an employee works 20 hours of a 40-hour week would be 0.5.

Three types of FTE's are used in Position Control:

Authorized	Maximum FTE units allowed for a position. Depending on whether you use full control or tracking mode, the system either prevents you from overfilling a position or simply issues a warning when you exceed this limit.
Occupied	Number of positions currently filled, in FTE units. A position is occupied or filled when the Occupied checkbox in an employee's pay rate is selected.
Vacant	Number of positions that are not filled, based on how many positions are authorized and how many are filled. The system uses the following formula to determine this value: Authorized FTE's - Occupied FTE's = Vacant FTE's

Applying Position Control

Position records lend another dimension to your Human Resources records by addressing staffing and related budgeting. For example, if administrative assistants are on the same salary schedule but are classified into three grades (pay categories), you could set up a single job class, and then create three positions, one for each grade.

Job Class	Position	Authorized	Occupied	Budget
Administrative Assistant	Level-1	6.0	5.0	180,000
Administrative Assistant	Level-2	3.0	2.0	105,000
Administrative Assistant	Level-3	2.0	2.0	80,000

With full position control, you cannot exceed a position's authorized FTE's, while with tracking mode, the limit can be exceeded. In this latter case, the system issues a warning when adding a position to a pay rate overfills the position's maximum FTE's.

Another approach to setting up position records is to use them to control staffing by location. For example, administrative personnel might work at two locations but perform the same general duties and be paid at the same levels within their respective positions. In this case, you could set up several job classes and base the positions within the classes on the work location:

Job Class	Job Title	Position FTE's	Position FTE's
1010	Manager	Admin-1 1.0	Admin-2 1.0
1020	Supervisor	Admin-1 3.0	Admin-2 2.0
2010	Secretary	Admin-1 6.0	Admin-2 4.0
2110	Clerk-Typist	Admin-1 3.0	Admin-2 2.0

In assigning job classes to employees, you can default salaries, deductions, and leave information to their primary pay rates and salaries to their secondary rates. Any differences between employees within a class can be entered when setting up their rates in Human Resources' Pay Rate Information page. Meanwhile, the positions within the classes enable you to control staffing and budgeting separately for the locations referenced.

Important

Map out your structure for job classes and positions before setting up the Job Class table in Human Resources and the Position table in Position Control.

Position Control Page

Use this page to perform the following functions:

- Search for and list records stored in Position Control's Position table.
- Delete position records that are not assigned to employees' pay rates.
- Generate a report on records in the Position table.
- Display pages for adding and updating position records, listing employees who currently occupy positions, and viewing and updating position history records.

Menu Path: Human Resources > Entry & Processing > Position Control > Position Control

Action Bar Items

The Position Control page's Action Bar displays the following items after you run a search for positions:

Occupants	Displays the Position Occupants page, which lists all employees assigned to a selected position. For information on using this page, refer to Position Occupants Page (page 25).
Position History	Displays the Position History page, which lists employees who have held a selected position. For information on using this page, refer to Position History Page (page 26).

Procedures

This section includes the procedures for deleting and printing position records. For the procedure for adding positions, refer to New Position Page (page 19).

Deleting a position record

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. Click (OK).
4. In the page's untitled List section, select the position you want to delete.
5. Click (Delete).
6. In the confirmation dialog, click **Yes**.

Note
You cannot delete a position that is assigned to one or more employee pay rates.

Generating the Position Table report

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. Click (OK).
4. Click (Print)

5. In the Position Control Report page, select the following checkboxes as needed:

Include Accounts on Report	Includes the budget unit and project distributions associated with the positions listed.
Include Comments on Report	Includes text from the Comments lines in the positions listed.

6. If needed, click **Sort** on the Action Bar to display a page for defining the report's sort order. After entering your settings, click (OK) to return to the Position Control Report page.
7. Click (OK).
8. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *updpos83.rpt*.

Sample Position Table Report with Distributions and Comments

```
SUNGARD                                                                                                                    PAGE NUMBER:   1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                                             UPDPOS83
TIME: HH:MM:SS                                         POSITION TABLE REPORT

SELECTION CRITERIA: position.class matches 'CLER' and position.locn='3000'

CLASS DESCRIPTION                POSITION     LOCATION  DESCRIPTION          AUTHORIZED FTE  OCCUPIED FTE  DEFAULT FTE

CLER  CLERICAL                   LEVEL1       3000       ADMINISTRATIVE ANNEX      10.000000      9.000000     1.000000
                                                        *BUDGET UNIT*       ACCOUNT   PERCENT         *PROJECT*          ACCOUNT   PERCENT
                                                        100000541110        00117      1.0000
                                                         COMMENT LINE 1: CLERK-TYPIST ENTRY LEVEL POSITION
                                                         COMMENT LINE 2:

CLER  CLERICAL                   LEVEL2       3000       ADMINISTRATIVE ANNEX       6.000000      6.000000     1.000000
                                                        *BUDGET UNIT*       ACCOUNT   PERCENT         *PROJECT*          ACCOUNT   PERCENT
                                                        100000541110        00117      1.0000
                                                          COMMENT LINE 1: CLERK-TYPIST WITH ADDITIONAL RESPONSIBILITY
                                                          COMMENT LINE 2: FOR CUSTOMER AND ADMINISTRATIVE SUPPORT

CLER  CLERICAL                   LEVEL3       3000       ADMINISTRATIVE ANNEX       3.000000      3.000000     1.000000
                                                        *BUDGET UNIT*       ACCOUNT   PERCENT         *PROJECT*          ACCOUNT   PERCENT
                                                        100000541110        00119      1.0000
                                                          COMMENT LINE 1: CLERICAL TEAM LEADER
                                                          COMMENT LINE 2:
```

Sample Position Table Report without Distributions and Comments

```
SUNGARD                                                                                                                    PAGE NUMBER:   1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                                             UPDPOS83
TIME: HH:MM:SS                                         POSITION TABLE REPORT

SELECTION CRITERIA: position.class matches 'CLER' and position.locn='3000'

CLASS DESCRIPTION                POSITION     LOCATION  DESCRIPTION          AUTHORIZED FTE  OCCUPIED FTE  DEFAULT FTE

CLER  CLERICAL                   LEVEL1       3000       ADMINISTRATIVE ANNEX      10.000000      9.000000     1.000000
CLER  CLERICAL                   LEVEL2       3000       ADMINISTRATIVE ANNEX       6.000000      6.000000     1.000000
CLER  CLERICAL                   LEVEL3       3000       ADMINISTRATIVE ANNEX       3.000000      3.000000     1.000000
```

New Position Page

Use this page to add positions to the Position table.

Menu Path: Human Resources > Entry & Processing > Position Control > Position Control > click (Add New)

Prerequisites

Following are the primary requirements for creating position records in the New Position page:

Human Resources Profile

System Administration > All > Profiles > Human Resources Profile

- The Profile's Position Control field must be set to either Y - Use Position Control or T - Tracking Mode.

Job Class Table

Human Resources > Reference Tables > Payroll > Job Classes

- Human Resources' Job Class table must contain the job classes required for the positions you want to create.
- The job classes you want to use must be under position control and cannot be assigned to any employee pay rates. If a class is not under position control or is already assigned to a pay rate, you must use the Batch Position Control option to add positions to the class.

Location Table

Human Resources > Reference Tables > Personnel > Locations

- Human Resources' Location table must contain codes referencing the buildings or sites you want to assign to the new positions.

Fund Accounting System

Fund Accounting > Reference Tables > Reference Tables > Organization Chart, Account List, or Project List

- The Organization Chart, Account List, and Project List (optional) must be set up in Fund Accounting for distributing salary expenditures for the positions being created.

Fund Accounting > Entry & Processing > Budget Ledgers > Expenditure Ledger

- *Budget Unit*/Account combinations for salary distributions must be set up in Fund Accounting's Expenditure Ledger.

Fund Accounting > Entry & Processing > Budget Ledgers > Project Ledger

- If you also use project accounting, the appropriate *Project*/Account combinations must exist in the Project Ledger.

Additional requirements for individual fields in the New Position page are listed below in the Fields section.

Procedure

Adding a record to the Position table

1. Select Human Resources > Entry & Processing > Position Control > Position Control .
2. In the Position Control page, click (Add New).
3. In the New Position page, complete the fields in the Position, FTE, and Salary sections as needed. The Salary section only applies if you use full position control.

4. Click (OK).
5. In the Financial section, enter the Fund Accounting distributions for the position's salary expenditures. Use <TAB> to advance through the fields.
6. Click (OK) to save the batch record when you complete your distribution entries.
7. Once the Financial section is complete, the following pages display in the order shown for entering information related to Highly Qualified Teacher requirements:

    1. Link Qualified Area to Position
    2. Certification Code Setup
    3. Link Requirement to Position
    4. Degree Linking Selection
    5. General Degree Linking
    6. Degree Linking

    - If your district tracks Highly Qualified Teachers by position, complete these pages as needed. The position you entered will be saved when you click **Finish** in the Degree Linking page.
    - If your district does not track Highly Qualified Teachers by position, you can click (Back) three times to skip through these pages.

    For information on the pages listed above, refer to Highly Qualified Teachers: Position Control (page 83).

Fields

The New Position page includes three sections: Position, Salary, and Financial. Following are descriptions of the fields in these sections.

Position Section

The fields in this section identify the Position record, including related information, such as Location, Bargaining Unit, and Job Description.

Job Class

: Code identifying the class associated with the position you want to create, as defined in Human Resources' Job Class table. The job class you enter must be under position control. In addition, the class cannot be assigned to any employee pay rates in Human Resources.

: To create a position for classes that are not under position control or that already have rates assigned, use the Batch Position Control option. For information on setting up these positions, refer to Batch Position Control Page (page 31).

Position

: Code identifying the position you want to add to the Position table. Keep in mind that no two records can have the same combination of job class and position. [Character/12]

Description

: Text describing the position. [Character/35]

Location

: Code identifying the primary building or site associated with the position. These codes are defined in Human Resources' Location table.

Bargaining Unit

: Bargaining unit for this job class and position, if applicable. These codes are defined in the Bargaining Unit table. Leave the field blank if a bargaining unit does not apply to the class and position.

Comments

: Two lines for entering notes or other text information concerning the position. After you complete the first line, press <Tab> to advance to the second. [Character/60, each line]

Position Type
: Code identifying the type of position.

Job Description
: Text describing the position's job responsibilities.

FTE Section

The fields in this section set and track the occupancy of positions in terms of full-time equivalency (FTE) units.

Authorized FTE
: Maximum number of employees who can fill this position as measured in FTE units. An FTE unit is the percentage of time someone works relative to full-time (1.0 = 100%). For example, the FTE value for an employee who works three days of a five-day week would be 0.6.

Pending Transfer FTE
: FTE units that have been requested for transfer for a position in Recruitment. The value is updated if your organization has allowed budget transfers on the Posting Requisition Setup page. This field only displays for districts that use the Recruitment System.

Posting FTE
: Any FTE units associated with a non-filled job posting in Recruitment. This field only displays for districts that use the Recruitment System.

Occupied FTE
: Number of employees who currently occupy this position, expressed in FTE units. If the Position Control field in your Human Resources Profile is set to Y - Use Position Control, the occupancy of a position cannot exceed its authorized FTE value.

The system updates this field as follows:

- When you assign the position to a pay rate.
- When you change the FTE field in a rate associated with the position.
- When you terminate a rate that contains the position.

Available FTE
: Number of FTE units that are unoccupied, which is calculated as follows: Authorized FTE - Occupied FTE = Available FTE.

Default FTE
: Default value that displays in a pay rate’s FTE field when you assign a position to an employee’s rate.

- Generally, the default value should be set to 1.0 on the assumption that most positions are full-time.
- If you are setting up a record for a position that is usually part time, enter the FTE that applies in the majority of cases. You can adjust the value when creating pay rates for employees whose work hours vary from the norm.

Salary Section

If your Human Resources Profile’s Position Control field is set to Y - Use Position Control, you can use this section to track salaries. If the setting is T - Tracking Mode, click OK to skip these fields and advance to the Financial section. These fields clear when you run the Fiscal Year End Maintenance option.

Budget
: Amount budgeted for this position in the current fiscal year, which should represent all salaries anticipated under this position. The system updates this value when you run the Personnel Budgeting’s Post to Position Control option.

Leave the field at its 0.00 default if you do not track salaries or if you intend to run Personnel Budgeting after setting up your position records.

Actual

Cumulative amount paid to employees who have the position assigned. The system updates this field during payroll processing, provided the Position Control flag in your Human Resources Profile is set to Y - Use Position Control. In most cases, you should leave the field at its 0.00 default.

Projected

Cumulative amount paid for this position in the current fiscal year. When you run the Payroll Encumbrance option, salaries for employees in this position are added to the Projected field. For now, you may leave the field at its 0.00 default. Later, after all salaries are accumulated and you begin preparing your budget, you can increase or decrease this amount.

Financial Section

Use this section to define the distributions of salary expenditures in the Fund Accounting System for the position you are creating. Keep in mind that the distributions for positions can only be modified in Position Control; they cannot be changed in Human Resources.

When you add a position to a pay rate, the information from the Financial section defaults to the rate. Also, if you modify a position's distributions and then post it to Human Resources, the new distributions overwrite the existing ones in pay rates that have the position assigned.

If your Fund Accounting Profile allows translating the full expenditure account number into budget unit and account codes, the Full Account Window page displays when you reach the *Budget Unit* or *Project* field. For information on using this page, refer to Full Account Window Page (page 37).

Budget Unit

Low organization used for distributing the gross salaries paid under this position, as defined in Fund Accounting's Organization Chart. As indicated by the asterisks, the titles of the *Budget Unit* and *Project* fields are defined in the Human Resources Profile.

Account

Number identifying the account that should be used to distribute salary costs for this position. Accounts are defined in Fund Accounting's Account List. The combination of the entries in the *Budget Unit* and Account fields must exist in Fund Accounting's Expenditure Ledger.

%

Percentage of the position's gross wages to be distributed to the *Budget Unit*/Account. Enter the percentage as a decimal. The entries in this column must equal 100 percent (1.00).

Project

Code identifying the low project organization to use for distributing the position's gross salary in Fund Accounting. If you do not use project accounting, click (OK) to leave the fields in this section blank.

Account

Number identifying the account associated with the project, as defined in Fund Accounting's Account List. The combination of the entries in the *Project* and Account fields must exist in Fund Accounting's Project Ledger.

%

Percentage of the position's gross wages to be distributed to the *Project*/Account. Enter the percentage as a decimal. The entries in this column must equal 100 percent (1.00).

Full Account Window Page

If your Fund Accounting Profile's Full Account Expense field is selected, the Full Account Window page displays automatically when you reach the Financial sections of Position Control pages. The page enables you to complete the *Budget Unit* and *Project* fields in these sections by entering a full account number. The setup of the full account number is defined in the Fund Accounting Profile.

A help page is available for selecting full account numbers. To display the Full Account Help page, click **Account Help** on the Full Account Window page's Action Bar.

Note

If the Full Account Window page displays and you have completed the necessary lines in the original page's Financial section, click (Back) to close the page.

Procedure

Selecting a full account number

1. In the Full Account Window page, click **Account Help** on the Action Bar to display the Full Account Help page.
2. In the page's Query Type section, click (OK) to accept Expenditure Ledger (default).
3. In the Full Account Search section, enter criteria to identify the accounts you want to list.
4. Click (OK) to list the accounts.
5. In the List section, select the number you want, and then click (OK). This closes the help page and returns you to the Full Account Window page. The number you selected will display in the Full Account field.
6. Click (OK) to return to the Financial section of the page you were using.

   The *Budget Unit* or *Project* field (depending on which field you started in) will display the low appropriate organization number, while the Account field will display the appropriate account number.

Edit Position Page

Use this page to update position records. You can change all information in a record, except the Job Class and Position codes. When you post the position, your changes carry over to all rates associated with the position.

Menu Path: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click (OK)

Action Buttons

The Edit Position page provides the following action buttons for accessing additional pages related to Highly Qualified Teacher requirements:

Qualifications	Displays the Link Qualified Area to Position page.
Certifications	Displays the Certification Code Setup page.
Requirements	Displays the Link Requirement to Position page.
Degrees	Displays the Degree Linking Selection page.

For information on the pages accessed, refer to Highly Qualified Teachers: Position Control (page 83).

Procedure

Updating position records

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the positions you want. To perform an advanced search, use the **Advanced** button.
3. Click (OK) to list the positions.
4. In the page's untitled List section, select the position you want to update, and then click (OK).
5. Change the fields as needed.

   For descriptions of these fields, refer to the previous section on the New Position Page (page 19).
6. If you need to update any of the pages related to Highly Qualified Teacher requirements, use the following action buttons: Qualifications, Certifications, Requirements, and Degrees.
7. Click (OK) to save the record.

Position Occupants Page

Use this page to view a list of employees who are assigned to a selected position. The page displays each employee’s ID number and name. In addition to showing the FTE value of the position, a flag (Yes or No) is included to indicate whether the employee’s pay rate is occupied.

Menu Path: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click **Occupants**

Procedure

Displaying employees associated with a position

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the untitled List section, select the position whose history you want to access.
4. Click **Occupants** on the Action Bar to display the Position Occupants page.

   If a position does not have any occupants, an error message displays.

5. Click (Back) to close the page and return to the Position Control page.

Position History Page

Use this page to display the history of a position, including a listing of employees who held the position, start and end dates, and other related information. If needed, you can add or change information in certain fields.

Menu Path: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click **Position History**

Procedure

Displaying and updating Position History records

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the untitled List section, select the position whose history you want to access.
4. Click **Position History** on the Action Bar to display the Position History page.

   If a position does not have history records, then the position has never been assigned to an employee. If this is the case, an error message will display.
5. In the list of employee's in the Position History page's Position Information section, select the desired employee, and then click (OK).
6. In the Position History Information section, complete or update the fields as needed. For field descriptions, refer below.
7. Click (OK) to save your changes.

Tip

As an alternative to Step 5, you can select the employee, and then click **Employee Position History** on the Action Bar. This displays a version of the Position History page which lists all of the employee's positions, as opposed to the current or most recent one. To edit a position, select it, and then click (OK) to access its fields.

Fields

Location
: Code identifying the primary building or site associated with the position. These codes are defined in Human Resources' Location table.

Reason
: Text explaining why the employee's position was assigned or vacated. [Character/25]

Exempt Status
: User-defined code referencing an employee's exemption status, usually in regards to taxes. The code can also address other aspects of employment if desired, such as retirement plans or contracts. [Character/1]

  Used for information purposes only, this field does not appear in other records.

EEO Category
: Select the employee's EEO category.

Supervisor
: Name of the employee's supervisor. [Character/25]

Department
: Code identifying the employee’s department, as defined in Human Resources’ Department table.

Effective Date
: Select a date to assign to the history record.

Operator ID
: The user ID of the staff member who entered the record.

Purge Position History Page

Use this option to delete records from the Position History table. To be purged, a record must have an end date. This prevents you from deleting histories of positions that are still in use.

After you generate a list of records in the Purge Position History page, you can use Purge on the page's Action Bar to purge the records selected. For the complete steps to follow, refer to the Procedure section.

Caution

When records are purged, they are permanently deleted. Consider backing up your database before using this option.

Menu Path: System Administration > All > Human Resources Purge Options > Purge Position History

Purge Position History Report

The Purge Position History page enables you to enter selection criteria to specify the records to purge. Before performing the purge, the system produces a report which allows you to review the records before deleting them.

The Purged Position History report is organized first by job class and position codes, and then in chronological order by end dates. Before executing the purge, review the report carefully to make sure that the records listed are the ones you want to purge.

Procedure

Purging records from the Position History table

1. Select System Administration > All > Human Resources Purge Options > Purge Position History to display the Purge Position History page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the List section, review the records to make sure they are correct.
4. Click **Purge** on the page's Action Bar.
5. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *prgposhs.rpt*.
6. Review the Purge Position History report to verify that these are the records you want to purge.
7. In the Confirmation dialog, click **OK** to delete the records or **Cancel** to cancel the purge.

Fields

The following fields in the Search Criteria section enable you to identify the records to purge.

Employee Number
: Number identifying an employee, as assigned in Human Resources. To enter multiple ID’s, use the pipe symbol to separate each, for example, *112233|223344|334455*. You can also use the colon to identify a range of ID numbers, for example, *110001:110050*.

Job Class
: Code identifying a job class, as defined in Human Resources’ Job Class table.

Position
: Code identifying an employee’s position, as defined in Position Control’s Position table. To enter multiple codes, use the pipe symbol to separate each code, for example, *1400|2100|2700* or *LEVEL1|LEVEL2*. You can also use the asterisk to reference codes that begin with the same characters; for example LEV* matches *LEVEL1*, *LEVEL2*, and *LEVEL3*.

Location
: Code identifying an employee's building or work site, as defined in Human Resources' Location table.

Department
: Code identifying an employee's department, as defined in Human Resources' Department table.

Start Date
: Date when the employee occupied the position. You can use the greater than (>) and less than (<) symbols in this field. For example, *<10012016* matches all records with start dates that fall before October 1, 2016.

End Date
: Date when the employee vacated the position. You can use the greater than (>) and less than (<) symbols in this field. For example, *<01012017* matches all records with end dates that fall before January 1, 2017.

Sample Purged Position History Report

```
SUNGARD                                                                                         PAGE NUMBER:   1
DATE: MM/DD/YYYY                              YOUR ORGANIZATION'S NAME                          MODULE NUM:  PGPSHST3
TIME: HH:MM:SS                                PURGED POSITION HISTORY REPORT

SELECTION CRITERIA:  posnhist.empl_no in (112233445,223344556)
                                                                         PAY  START    END
CLASS                   POSITION   EMPL NO   NAME                        CODE DATE     DATE     STAT LOCN DEPT       FTE

1550 ADMINISTRATOR II   2010       112233445 RICHARD N PRESSMAN          155 03/27/99 12/15/04 TERM 1000 2020   1.000000
                                   223344556 JENNIFER L CRIST            155 06/15/92 02/10/05 TERM 1000 2020   1.000000
```

3: Batch Position Control

The Batch Position Control option enables you to create positions in job classes that are tied to pay rates in Human Resources. By processing these records in a batch table, you can add positions, make changes, and assign rates to employees without affecting your payroll records.

Preview

Batch Position Control Page

Use the Batch Position Control page to perform the following functions:

- Search for and list records stored in Position Control's Batch Position table.
- Delete batch position records.
- Generate a report showing records in the Batch Position table.
- Display pages for adding and changing batch position records.
- Access pages for posting positions to the Position table, assigning rates to batch positions, and listing employees whose rates have batch positions assigned.

Menu Path: Human Resources > Entry & Processing > Position Control > Batch Position Control

Action Bar Items

The Batch Position Control page's Action Bar includes the following items:

Post	Displays the Position Report/Post page, which is used to post positions to the Position table. You should run this option first to generate the Batch Position Pre-Posting Journal. If the positions' rate assignments are satisfactory, you can then run the post.
Assign Rates	Displays the Assign Rates to Batch Positions page, which is used to assign batch positions to employees' pay rates. This item displays on the Action Bar after you run a list of batch positions.

Procedures

This section includes the procedures for deleting and printing batch position records. For information on adding batch positions, refer to Batch Position Edit Page (page 33).

Deleting a batch position record

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. Click (OK).
4. In the page's untitled List section, select the position you want to delete.
5. Click (Delete).
6. In the confirmation dialog, click **Yes**.

Generating the Batch Position Table report

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. On the confirmation dialog, click **OK**.
4. Click (Print)

5. In the Batch Position Control Report page, select the following checkboxes as needed:

Include Accounts on Report	Includes the budget unit and project distributions associated with the batch positions listed.
Include Comments on Report	Includes text from the Comments lines in the batch positions listed.

6. If needed, click **Sort** on the Action Bar to display a page for defining the report's sort order. After entering your settings, click (OK) to return to the Position Control Report page.
7. Click (OK).
8. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *batpos83.rpt*.

Sample Position Table Report with Distributions and Comments

```
SUNGARD                                                                                      PAGE NUMBER:   1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME               UPDPOS83
TIME: HH:MM:SS                                         POSITION TABLE REPORT

SELECTION CRITERIA: position.classify matches 'SCTY' and position.locn='2000'


CLASS DESCRIPTION  POSITION     LOCATION  DESCRIPTION          AUTHORIZED FTE  OCCUPIED FTE  DEFAULT FTE

SCTY  SECRETARIAL  LEVEL1       2000      OPERATIONS CENTER          8.000000      8.000000     1.000000
                                         *BUDGET UNIT*       ACCOUNT   PERCENT        *PROJECT*        ACCOUNT  PERCENT
                                          100000541220      00117      1.0000
                                            COMMENT LINE 1: ENTRY LEVEL SECTRETARIAL-CLERICAL SUPPORT
                                            COMMENT LINE 2:

SCTY  SECRETARIAL  LEVEL2       2000      OPERATIONS CENTER          6.000000      5.000000     1.000000
                                         *BUDGET UNIT*       ACCOUNT   PERCENT        *PROJECT*        ACCOUNT  PERCENT
                                          100000541220      00117      1.0000
                                            COMMENT LINE 1: SECRETARIAL-ADMINISTRATIVE SUPPORT
                                            COMMENT LINE 2:

SCTY  SECRETARIAL  LEVEL3       2000      OPERATIONS CENTER          2.000000      2.000000     1.000000
                                         *BUDGET UNIT*       ACCOUNT   PERCENT        *PROJECT*        ACCOUNT  PERCENT
                                          100000541220      00119      1.0000
                                            COMMENT LINE 1: SECRETARIAL TEAM LEADERS
                                            COMMENT LINE 2:
```

Sample Position Table Report without Distributions and Comments

```
SUNGARD                                                                                      PAGE NUMBER:   1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME               UPDPOS83
TIME: HH:MM:SS                                         POSITION TABLE REPORT

SELECTION CRITERIA: position.classify matches 'SCTY' and position.locn='2000'


CLASS DESCRIPTION              POSITION     LOCATION  DESCRIPTION          AUTHORIZED FTE  OCCUPIED FTE  DEFAULT FTE

SCTY  SECRETARIAL              LEVEL1       2000      OPERATIONS CENTER          8.000000      8.000000     1.000000
SCTY  SECRETARIAL              LEVEL2       2000      OPERATIONS CENTER          6.000000      5.000000     1.000000
SCTY  SECRETARIAL              LEVEL3       2000      OPERATIONS CENTER          2.000000      2.000000     1.000000
```

Batch Position Edit Page

Use this page to add and change positions in Position Control's Batch Position table. The batch table enables you to create positions for job classes that are already being used in rates in Human Resources. After you set up the table, you can post the batch positions for selected job classes to Position Control's live Position table and Human Resources' Pay Rate table.

Menu Path: Human Resources > Entry & Processing > Position Control > Batch Position Control > click (Add New) or run a search and select a position for updating

Prerequisites

Following are the primary requirements for creating batch positions:

Human Resources Profile

System Administration > All > Profiles > Human Resources Profile

- The Profile's Position Control field must be set to either Y - Use Position Control (full control) or T - Tracking Mode.

Job Class Table

Human Resources > Reference Tables > Payroll > Job Classes

- Human Resources' Job Class table must contain the job classes required for the positions you want to create.
- The job classes you select for creating batch positions cannot be under position control. Also, the classes must be assigned to employees' pay rates in Human Resources. If a class is under position control and is not assigned to any rates, use the Position Control folder's Position Control option to add positions to the class.

Location Table

Human Resources > Reference Tables > Personnel > Locations

- Human Resources' Location table must contain codes referencing the buildings or sites you want to assign to the batch positions.

Fund Accounting System

Fund Accounting > Reference Tables > Reference Tables > Organization Chart, Account List, or Project List

- The Organization Chart, Account List, and Project List (optional) must be set up in Fund Accounting for distributing salary expenditures for the positions being created.
- *Budget Unit*/Account combinations for salary distributions must be set up in Fund Accounting's Expenditure Ledger.

Fund Accounting > Entry & Processing > Budget Ledgers > Project Ledger

- If you also use project accounting, the appropriate *Project*/Account combinations must exist in the Project Ledger.

Procedure

Adding a record to the Batch Position table

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control.
2. In the Batch Position Control page, click (Add New).
3. In the Batch Position Edit page, complete the fields in the Position section.

4. Click (OK).
5. In the Financial section, enter the Fund Accounting distributions for the position's salary expenditures. Use <TAB> to advance through the fields.
6. Click (OK) when you complete your distribution entries.
7. Once the Financial section is complete, the following pages display in the order shown for entering information related to Highly Qualified Teacher requirements:

   Batch Link Qualified Area to Position
   Batch Certification Code Setup
   Batch Link Requirement to Position

   - If your district tracks Highly Qualified Teachers by position, complete these pages as needed. The additional information will be saved when you click (OK) in the Batch Link Requirement to Position page.
   - If your district does not track Highly Qualified Teachers by position, you can click (OK) in each of the pages without making any entries.

   For information on the pages listed above, refer to Highly Qualified Teachers: Position Control (page 83).

Fields

Position Section

The fields in this section identify the Position record, including related information, such as FTE's, Location, Bargaining Unit, and Job Description.

Job Class
: Code identifying the class associated with the position you want to create, as defined in Human Resources' Job Class table. The job class you enter must be under position control. In addition, the class cannot be assigned to any employee pay rates in Human Resources.

  To create a position for classes that are not under position control or that already have rates assigned, use the Batch Position Control option. For information on setting up these positions, refer to Batch Position Control Page (page 31).

Position
: Code identifying the position you want to add to the Position table. Keep in mind that no two records can have the same combination of job class and position. [Character/12]

Description
: Text describing the position. [Character/35]

Authorized FTE's
: Maximum number of employees who can fill this position as measured in FTE units. An FTE unit is the percentage of time someone works relative to full-time (1.0 = 100%). For example, the FTE value for an employee who works three days of a five-day week would be 0.6.

Occupied FTE's
: Number of employees who currently occupy this position, expressed in FTE units. If the Position Control field in your Human Resources Profile is set to Y - Use Position Control, the occupancy of a position cannot exceed its authorized FTE value.

The system updates this field as follows:

- When you assign the position to a pay rate.
- When you change the FTE field in a rate associated with the position.
- When you terminate a rate that contains the position.

Default FTE
: Default value that displays in a pay rate’s FTE field when you assign a position to an employee’s rate.

- Generally, the default value should be set to 1.0 on the assumption that most positions are full-time.
- If you are setting up a record for a position that is usually part time, enter the FTE that applies in the majority of cases. You can adjust the value when creating pay rates for employees whose work hours vary from the norm.

Location
: Code identifying the primary building or site associated with the position. These codes are defined in Human Resources’ Location table.

Bargaining Unit
: Bargaining unit for this job class and position, if applicable. These codes are defined in the Bargaining Unit table. Leave the field blank if a bargaining unit does not apply to the class and position.

Comments
: Two lines for entering notes or other text information concerning the position. After you complete the first line, press <Tab> to advance to the second. [Character/60, each line]

Position Type
: Code identifying the type of position.

Job Description
: Text describing the position's job responsibilities.

Financial Section

Use this section to define the distributions of salary expenditures in the Fund Accounting System for the position you are creating. Keep in mind that the distributions for positions can only be modified in Position Control; they cannot be changed in Human Resources.

When you add a position to a pay rate, the information from the Financial section defaults to the rate. Also, if you modify a position’s distributions and then post it to Human Resources, the new distributions overwrite the existing ones in pay rates that have the position assigned.

If your Fund Accounting Profile allows translating the full expenditure account number into budget unit and account codes, the Full Account Window page displays when you reach the *Budget Unit* or *Project* field. For information on using this page, refer to Full Account Window Page (page 37).

Budget Unit
: Low organization used for distributing the gross salaries paid under this position, as defined in Fund Accounting’s Organization Chart. As indicated by the asterisks, the titles of the *Budget Unit* and *Project* fields are defined in the Human Resources Profile.

Account
: Number identifying the account that should be used to distribute salary costs for this position. Accounts are defined in Fund Accounting’s Account List. The combination of the entries in the *Budget Unit* and Account fields must exist in Fund Accounting’s Expenditure Ledger.

%
: Percentage of the position's gross wages to be distributed to the *Budget Unit*/Account. Enter the percentage as a decimal. The entries in this column must equal 100 percent (1.00).

Project
: Code identifying the low project organization to use for distributing the position's gross salary in Fund Accounting. If you do not use project accounting, click (OK) to leave the fields in this section blank.

Account
: Number identifying the account associated with the project, as defined in Fund Accounting's Account List. The combination of the entries in the *Project* and Account fields must exist in Fund Accounting's Project Ledger.

%
: Percentage of the position's gross wages to be distributed to the *Project*/Account. Enter the percentage as a decimal. The entries in this column must equal 100 percent (1.00).

Full Account Window Page

If your Fund Accounting Profile’s Full Account Expense field is selected, the Full Account Window page displays automatically when you reach the Financial sections of Position Control pages. The page enables you to complete the *Budget Unit* and *Project* fields in these sections by entering a full account number. The setup of the full account number is defined in the Fund Accounting Profile.

A help page is available for selecting full account numbers. To display the Full Account Help page, click **Account Help** on the Full Account Window page's Action Bar.

Note

If the Full Account Window page displays and you have completed the necessary lines in the original page's Financial section, click (Back) to close the page.

Procedure

Selecting a full account number

1. In the Full Account Window page, click **Account Help** on the Action Bar to display the Full Account Help page.
2. In the page's Query Type section, click (OK) to accept Expenditure Ledger (default).
3. In the Full Account Search section, enter criteria to identify the accounts you want to list.
4. Click (OK) to list the accounts.
5. In the List section, select the number you want, and then click (OK). This closes the help page and returns you to the Full Account Window page. The number you selected will display in the Full Account field.
6. Click (OK) to return to the Financial section of the page you were using.

   The *Budget Unit* or *Project* field (depending on which field you started in) will display the low appropriate organization number, while the Account field will display the appropriate account number.

Assign Rates to Batch Positions Page

Use this option to select employee rates from Human Resources, assign positions, and store the rates in the Batch Position table. While you can add new rates and modify those stored in the batch file, you cannot assign rates to positions that are already under Position Control.

After you add positions in the Batch Position Edit page and associate rates with positions in the Assign Rates to Batch Positions page, you can post your batch positions to the live Position table and post the assigned positions and rates to Human Resources.

Important

To post a job class's rates, you must assign positions to all rates in the class. Otherwise, the system prevents you from posting the rates.

Menu Path: Human Resources > Entry & Processing > Position Control > Batch Position Control > search for and select a position > click **Assign Rates** on the Action Bar > in the Assigned Rates window, select **Unassigned** or **Both**

Action Bar Items

The Action Bar in the Assign Rates to Batch Positions page includes the following item:

Multi-Position	Displays the Position Assignments page. This page enables you to assign one or more positions to an employee's rate, including their assigned FTE values. For more information on this page, see the second procedure in the following Procedures section.

Procedures

Following are the steps for assigning pay rates to employees' batch positions. An additional procedure is included for using the Position Assignments window to apply multiple positions to a rate.

Assigning employee rates to batch positions

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the List section, select a job class/position, and then click **Assign Rates** in the Action Bar.
4. In the Assign Rates window, click one of the following:

Unassigned	Lists employees in a job class who do not have positions assigned.
Both	Lists all employees in a job class whether they do or do not have positions assigned.

5. In the Assign Rates to Batch Positions page, complete the Primary, Position, and Start Date fields for each employee as needed.

   Except for Start Dates, the data shown is from the employees' pay rates. For descriptions of the fields, refer to the Fields section.

6. Click (OK) to save your entries to the Batch Position table.

Assigning multiple positions to an employee pay rate:

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the List section, select a position, and then click **Assign Rates** on the Action Bar display the Assign Rates page.
4. In the Assign Rates window, click one of the following:

Unassigned	Lists employees in a job class who do not have positions assigned.
Both	Lists all employees in a job class whether they do or do not have positions assigned.

5. In the Assign Rates to Batch Positions page, select an employee, and then click **Multi-Position** on the Action Bar to display the Position Assignments page:
6. In the Position field, select a position from the drop-down list.
7. In the FTE field, enter the position's full-time equivalency value.
8. Repeat Steps 5-7 for each position you want to add. The total of the FTE column must equal the job class's default FTE value.
9. Click (OK) to save your entries and return to the Assign Rates to Batch Positions page. Note that the page also saves when you press <Enter> in the FTE field.

   If you entered two or more positions in the Position Assignments page, the employee's Multi-Position field displays an asterisk.

Fields

The Assign Rates to Batch Positions page has two untitled sections: Header and List. Following are descriptions of the fields in these sections.

Header Section

The section's two fields display the codes identifying the batch record selected in the Batch Position Control page. You cannot change either field.

Class
: Code identifying a job class in Human Resources, as defined in the system's Job Class table. Display only.

Position
: Code identifying a position in the Batch Position table, in combination with the job class. Display only.

List Section

This section displays all employees with rates associated with the position's job class. Use the down arrow or scroll bar to scroll through the list. You can add to or change three fields for each employee: Primary, Position, and Start Date. The other fields are display only.

Employee
: Employee's identification number, as assigned in Human Resources.

Name
: Employee's full name.

Primary
: Checkbox indicating whether the position rate is a primary or secondary rate. If the box is selected, the rate is a primary rate. If not, the rate is a secondary rate.

Position
: Code identifying a position in Position Control's Batch Position table. At least one position must be assigned to each rate. Otherwise, no rates from the job class can be posted.

  - Multiple positions can be assigned to a rate using the Position Assignments page. For details on this page, refer to the Procedures section.
  - If two or more positions are assigned, this field will be blank, and an asterisk will display in the employee's Multi-Position field.

Start Date
: Transaction date in use when the batch rate was created. The date defaults from the Human Resources Profile.

  - If needed, change the default to the date the rate should take effect.
  - Accepting the default allows the rate to take effect when you post the batch record.

FTE
: Full-time equivalency (FTE) value that defaults from the job class to the rate.

Status
: Status code from the employee's rate record. Since the Batch Position table cannot accept rates that are inactive or terminated, this field always displays the code A - Active.

Multi-Position
: Field indicating whether more than one position is assigned to the rate. If an asterisk (*) appears in an employee rate's Multi-Position column, the rate has two or more positions assigned. To view the positions for a particular rate, display the Position Assignments page by positioning the cursor on the rate and clicking the Multi-Position item.

Position Batch Report/Post Page

Use the Position Batch Report/Post page to post records from the Batch Position table to Position Control's Position table and Human Resources' Pay Rate table.

Menu Path: Human Resources > Entry & Processing > Position Control > Batch Position Control

Generating Reports on Batch Positions

Before running the post, you should run the following reports from the Human Resources > Reports > Position Control menu to review your batch records:

- Position Status Summary Report
- Position Status Detail Report

You can also generate the following report by clicking (Print) after generating a list of batch positions in the Batch Position Control page:

- Print Batch Position Table Report

Generating Pre-Posting Journals

The process for posting batch positions to Position Control's Position table generates the following journal reports to enable you to review your batch positions first.

- Batch Position Pre-Posting
- Batch Position Pre-Posting Account Differences

Preview

The following sections discuss the procedures related to the Position Batch Report/Post page:

Generating Pre-Posting Journals

Use the Position Batch Post/Report page to generate the following journals before running the actual posting. This enables you to determine if any errors exist in the positions and rates being posted, so that you can correct them.

Batch Position Pre-Posting	Orders records first by job class, and then position code. The data also includes the location and authorized FTE's. For the pay rates assigned, the report lists each employee's ID number and name, as well as the rate number and type (primary or secondary). Also shown are the rates' FTE values and occupied flags, all of which which should be set to Y. The report's default file name is *batpos43.rpt*.
Batch Position Pre-Posting Account Differences	Reports any differences between the distributions for new rates and those in the original. If so, the following message displays in the Position Batch Post/Report page: Some position distribution accounts differ. The Batch Position Pre-Posting Account Differences report is not automatically generated. Instead, it is stored in a file named *acctdiff.rpt*.

To run the journals without posting, leave the Position Batch Post/Report page's Post Batch Entries checkbox blank.

Correcting Errors

Besides listing the records that will be affected, the pre-posting journals include two types of messages:

Error messages	Indicate problems that will prevent the entire class (and all of its positions/rates) from being posted. These errors must be corrected.
Warnings	Indicate that certain data may be altered in the posting process; however, the records can still be posted.

Most messages relate to rates that do not have positions assigned. Another common error is the overfilling of positions. In this case, the type of message that appears depends on the Position Control field in your Human Resources Profile.

- If the field is set to Y -Use Position Control, an error message generates when a position's Authorized FTE is exceeded. With this setting, overfilling is not permitted, and the system will prevent all positions and rates from being posted, not just those that are overfilled.
- If the field is set to T - Tracking Mode, overfilling is allowed, so a warning is issued instead, and the system will allow the posting.

To correct the errors indicated, use the Batch Position Edit and Assign Rates to Batch Positions pages, depending on the type of error. After making the corrections, run the reports again to make sure your records are error free.

Procedure

Generate the pre-posting journals

1. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.

3. In the List section, select the position you want to post, and then click **Post** to display the Position Batch Report/Post page. The page includes the following fields:

Job Class	The job class defaults from the batch position selected in the Batch Position Control page. You may select another job class, if needed.
Post Batch Entries	Leave the box blank to prevent the positions from being posted.

4. Click (OK).
5. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *postplog.rpt*.

   The Batch Position Posting Account Differences Journal also generates if changes were made in your distributions. This report is stored in a file named *acctdiff.rpt*.

6. Review the reports generate, correct any errors, and then re-run this option to make sure your records are correct

For the procedure on posting your batch records, refer to the next section, Posting Batch Positions (page 45).

Important

The system cannot post records when a Job Class contains any error. Keep in mind that errors are different from warnings. Records that generate warnings can be posted.

Sample Batch Position Pre-Posting Journal

```
SUNGARD                                                                                        PAGE NUMBER:   1
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                BATPOS43
TIME: HH:MM:SS                                   BATCH POSITION PRE-POSTING JOURNAL

SELECTION CRITERIA: bposition.classify='SCTY'

CLASS  POSITION       LOCATION                    AUTH FTE  EMPL NO   NAME                RATE#  P/S   OCCUPIED        FTE

SCTY   SECRETARY

       ADMIN-1        ADMN ADMINISTRATION CENTER   11.000000

                                                            17252     ALONZO, RITA B       01    P         Y          1.000

                                                            17390     CASE, DEBORAH T      01    P         Y           .500

                                                            15428     CHRISTMAN, MARCY L   01    P         Y          1.000

                                                            17390     FINDLAY, SUSAN P     01    P         Y          1.000

                                                            17176     HASTINGS, KATHERINE  01    P         Y          1.000

                                                            16725     LONG, ELLEN S        01    P         Y          1.000

                                                            16228     LU, NANCY M          02    S         Y           .500

                                                            15244     MANN-BARNES, DIANE   01    P         Y          1.000

                                                            16753     NICKELS, PEGGY R     01    P         Y          1.000

                                                            16195     PEREZ, VICKI A       01    P         Y          1.000

                                                            17003     RAIMES, MAXINE L     01    P         Y           .500

                                                            16927     SLOAN, BETTY G       01    P         Y          1.000

                                                            15629     STEVENS, PAMELA N    02    S         Y           .500

                                                            17390     ULANER, JANE A       01    P         Y          1.000

                                                            15824     WEST, BEVERLY D      01    P         Y          1.000

                     *WARNING -MAXIMUM OCCUPANCY OF POSITION EXCEEDED

                      TOTAL POSITION - ADMIN-1 - (OCCUPIED FTE'S)                                                 13.000000

       ADMIN-2        ANNX ADMINISTRATION ANNEX     4.000000

                                                            16252     GEIST, HEATHER E     01    P         Y           .500

                                                            16695     HYLAND, CHRISTINE A  01    P         Y          1.000

                                                            17021     NEEDHAM, LUANN S     01    P         Y          1.000

                                                            15883     OBRIEN, LINDA G      02    S         Y           .500

                                                            14976     PAULES, DONNA V      01    P         Y          1.000

                                                            16924     REICHL, PATRICIA W   01    P         Y          1.000

                     *WARNING -MAXIMUM OCCUPANCY OF POSITION EXCEEDED

                      TOTAL POSITION - ADMIN-2 - (OCCUPIED FTE'S)                                                  5.000000

       TOTAL CLASS - SCTY - (OCCUPIED FTE'S)                                                                      18.000000

       NO ERRORS FOUND IN CLASS

TOTAL REPORT (OCCUPIED FTE'S)                                                                                     18.000000
```

Sample Batch Position Pre-Posting Account Differences Journal

```
SUNGARD                                                                                         PAGE NUMBER:  1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                  BATPOS43
TIME: HH:MM:SS                         BATCH POSITION PRE-POSTING ACCOUNT DIFFERENCES JOURNAL

SELECTION CRITERIA: bposition.classify='SCTY'


CLASS  EMPL NO   NAME


SCTY   SECRETARIAL

       16228     LU, NANCY M           *WARNING - POSITION DISTRIBUTION ACCOUNTS DIFFER
       15629     STEVENS, PAMELA N     *WARNING - POSITION DISTRIBUTION ACCOUNTS DIFFER
       15883     OBRIEN, LINDA G       *WARNING - POSITION DISTRIBUTION ACCOUNTS DIFFER
```

Posting Batch Positions

Posting batch positions affects two tables in your live database, Position Control's Position table and Human Resources' Pay Rate table. The system completes the following processes when you post a selected position:

- Adds position records to the Position table. These are the same as your other position records, except their salary and budget fields are set to zero.
- Updates employees' pay rates to include the newly-assigned positions.
- Assigns new FTE values to the rate records, if the original values were changed.
- Selects the pay rates' Occupied checkboxes.
- Overwrites a rate's distribution with the changes you entered.
- Creates a history record for each position posted.

After you post the positions and rates, you can update the salary and budget fields in your position records. If needed, you can also modify individual pay rates in employee's Pay Rate Information pages in Human Resources.

Procedure

Posting batch positions

1. Generate the pre-posting journals, as described in the previous section, Generating Pre-Posting Journals (page 42).
2. Review the pre-posting journals to make sure your records are error free.
3. Select Human Resources > Entry & Processing > Position Control > Batch Position Control to display the Batch Position Control page.
4. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
5. In the List section, select the position you want to post, and then click **Post** to display the Position Batch Report/Post page. The page includes the following fields:

Job Class	The job class defaults from the batch position selected in the Batch Position Control page. You may select another job class, if needed.
Post Batch Entries	Select the box to enable the positions to be posted.

6. Click (OK).
7. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *postplog.rpt*.
8. Review the Batch Position Posting log to determine the results of the posting.
   - If the system detects any errors, none of the records are posted for the class selected. Correct the errors indicated, and then repeat the procedure, including running the pre-posting reports.
   - The Batch Position Posting Account Differences Journal also generates if changes were made to the positions' distributions. The changes reported are not errors, but you should be aware of them since they replace the existing distributions. This report's default file name is *acctdiff.rpt*.

Note

The formats of the Batch Position Posting Log and Batch Position Posting Account Differences Journal are the same as those of the pre-posting journals. For sample reports, see Generating Pre-Posting Journals (page 42).

4: Position Occupancy

Once your Position table is set up, you can use either the Position Control System or Human Resources System to assign and maintain positions.

Position Control	You can fill, vacate, and maintain positions in employee pay rates using the system's Batch Position Control option. After you set up your batch pay rates, you can use this option to post the rates to Human Resources. For information on batch pay rates, refer to Batch Position Control (page 30).
Human Resources	You can assign positions and determine their occupancy in the system's Pay Rates or Pay Rate Information page, depending on whether you are adding an employee or updating an existing employee's pay rate.

Preview

Assigning Positions to New Employees

The Pay Rates page is one of the pages used in adding employees to your Human Resources database. This section provides the procedure for assigning positions to new employees. For more information on setting up new employee records, refer to your Human Resources manual's Adding Employee Records chapter.

Menu Path: Human Resources > Entry & Processing > Employee > Employee Information, click (Add New) in the Employee Information list page, and then complete the pages that display until the Pay Rates page displays.

Action Buttons

The following action buttons display in the Pay Rates page's Additional Actions section:

Positions	Displays the Position Assignments page, where you can assign positions to a pay rate. To display the page, the employee's job class must be under position control. You do not need to use this button when adding positions for a new employee. Its primary use is for updating positions for existing employees.
Pay Dates	Displays the Pay Dates page, where you can select the start and end dates from the employee’s calendar. If an employee needs to be paid for days outside the calendar’s range, you can change the dates with this page. For additional information on the Pay Dates page, refer to your Human Resources manual.
Rates Window	Displays the Additional Rates page, which enables you to enter rates for additional duty pay, but only for the employee’s primary rate. For details, refer to your Human Resources manual.

In addition, the following action buttons display in the Controls section for navigating in the employee pages: Cancel, Next, and Finish.

Procedure

Assigning positions to a new employee

1. Select Human Resources > Entry & Processing > Employee > Employee Information to display the Base Employee Information page.
2. Click (Add New) to display the Base Employee Information page. This is the first in the series of pages used to create records for a new employee.
3. Complete the Base Employee Information page, and then complete each succeeding page until the Pay Rates page displays.
4. In the Pay Rates page, complete the fields through the Contract Limit field. For field descriptions, refer below.

   Important

   In the Job Class field, you must enter a class that is under position control.

5. Click **Next** in the Contract Limit field to display the Position Assignments page.

6. In the Position Assignments page, complete the following fields for each position you want to assign. You must enter at least one position.

Position	Select a position to assign to the rate.
FTE	Enter the position's full-time equivalency value. For example, if the position is full-time, enter 1.0; if it is part-time and the employee works 20 hours in a 40-hour week, enter 0.5.

7. Click (OK) to close the page.
8. Click **Next** to save the pay rate.
9. In the Enter Effective Date window, enter a date, and then click **Next** to save the pay rate.
10. A message displays asking if you want to add another pay rate.
    - Click **Yes** to add another rate, and then repeat Steps 4-9.
    - Click **No** to display the next page in the add employee process.

Note

The default distributions in the Organization and Project sections are defined in the Position record and can only be changed in Position Control.

Fields

Following are descriptions of the fields in the Pay Rates page. For more information on these fields, refer to the Adding Employee Records and Changing Employee Records chapters of your Human Resources manual.

General Section

The fields in this section identify a pay rate during payroll processing.

Class

Employee's job class, as defined in Human Resources' Job Class table. To be able to assign a position, you must select a class that is under position control.

Pay Code

Type of rate, as defined in Human Resources' Pay Code table.

Pay Group

User-defined, one-character code for grouping employees when processing payroll, W2's, and 1099-R's.

Status

Status of the rate.

Select:

A - Active - Enables the rate to be loaded in a timecard during pay runs. This is the default value when you add a rate.

I - Inactive - Prevents loading the rate in a timecard. An inactive rate can still be paid but must be entered manually on timecards. Position Control tracks inactive rates, unless the associated positions are vacated.

T - Terminated - Indicates the employee is not returning to the position. Terminated rates are not tracked in Position Control. Also, you cannot use this setting for an employee's primary rate.

Calendar Section

The information in this section defaults from the calendar assigned to the employee's job class. If the class includes a salary schedule, this information defaults as well.

Calendar
: Code identifying the employee's calendar. The code defaults from the employee's job class. You can override the default by selecting another code.

Start Date
: First date on the employee's calendar. The system uses the start and end dates to calculate the value in the Days Worked field. These dates also define the period in which the rate can be paid.

- You may select another date, though it must be within the range of dates specified on the calendar. When you change the start date, the system updates the Days Worked field accordingly.
- To enter a start or end date outside of the calendar's range, use the Pay Dates button to display the Pay Dates page, and then select the desired dates.

End Date
: Last date on the employee's calendar. If you change the date, make sure your entry is within the calendar's range. See the Start Date field for related information.

Days Worked
: Number of days the employee works in a year. The total days default from the employee's calendar. This value is used in calculating annual salaries with the following pay methods: Hourly, Daily, Range/Step Rate, and Range/Step Pay.

Schedule
: Code identifying the employee's salary schedule, if one is assigned to the job class. The schedule determines the following values based on the Range and Step fields: pay rate, docking rate, and annual salary. If needed, you may change the default schedule.

Pay Method
: Code designating how the employee is paid.

Select:

Code	**Method**
H - Hourly	Per hour amount
D - Daily	Per day amount
P - Pay Period	Per pay period amount
S - Range/Step Rate	Scheduled per hour or day amount
R - Range/Step Pay	Scheduled per pay period amount

Range
: Salary schedule range (row) that contains the employee's pay. Schedules can have up to 99 ranges. Single-digit ranges (1 through 9) must be preceded by a zero; for example, enter 9 as 09. You cannot use a decimal number.

Step
: Salary schedule step (column) within the identified range that specifies the employee's pay. If a schedule does not have a step with the exact salary, you can use a decimal number. For example, if you enter 4.5 in the Step field and the schedule has a salary of $30,000 for step 4 and $32,000 for step 5, the system calculates the salary as $31,000.

Pay Rate Information Section

The information in this section is used to calculate the employee's gross salary during a pay run.

Rate #
: System-generated number. The system assigns rate numbers in sequential order. Rate 1 is always the primary rate when you add an employee, since a primary rate must be created before secondary rates. However, you can have a primary rate that is not Rate 1 if you terminate the original rate and set up another primary rate. See the Status field for related information.

Primary Pay Rate
: Checkbox indicating whether the pay rate is a primary or secondary rate. Select the box if this is the employee's primary rate. You must enter a primary rate before you can create a secondary rate.

Pay Cycle
: Selection determining whether the employee should receive a second check when special pay or advanced pay is issued in a pay run. Select Second Check from the drop-down list if the employee should receive two checks in these instances. Otherwise, leave the field blank.

Hours/Day
: Number of hours per day the employee works in this position. The system uses this value to calculate the annual salary for hourly pay methods (Hourly and Range/Step Rate) and the docking rate for hourly and daily methods. Enter 1.00 if you record attendance/docking in days.

Include Dock
: Checkbox determining whether the system should include this pay rate in calculating the employee's docking rate. Select the box if the pay rate should be used in docking calculations. You must select the box for the primary rate. If you do not, the system selects it for you.

  To include a secondary rate in the docking rate, the primary rate must have a salaried pay method, either P - Pay Period or R - Range/Step Pay, and the Override Type field must be set to S - System Calculate. The docking rate does not appear in the secondary rate but defaults to the primary rate.

Pays/Year
: Number of pays issued to the employee annually under this rate. The system uses the pays per year to calculate the annual salary for salaried pay methods (P - Pay Period and R - Range/Step Pay).

FTE
: Full-time equivalency value of the rate's positions (full time = 100% = 1.0).

  - If the rate's job class is under position control, you cannot access the FTE field. In this case, the field defaults the total FTE's of the positions entered in the Position Assignments page.
  - If the class is not under position control, enter the percentage of time the employee works under this rate relative to full time. Enter the percentage as a decimal (50% = 0.5).

Override Type
: Selection determining whether the system should calculate the docking rate and in some cases, the pay rate.

  Select

  O - Override Rate - For Pay Period and Range/Step Pay pay methods. With this setting, you must enter the docking rate. With a Pay Period method, you must also enter the pay rate.

  S - System Calculate - For Pay Period and Range/Step Pay pay methods, the system calculates the docking rate as follows: Annual Salary ÷ (Days Worked x Hours/Day)For Hourly, Daily, and Range/Step Rate methods, the docking rate is the same as the pay rate.

Pay Hours
: Number of scheduled hours in a regular pay period.

Pay Rate
: Gross wages paid to the employee, either hourly, daily, or per period, depending on the pay method.

- With an hourly salary schedule method, the pay rate defaults from the schedule based on the range and step.
- With a range/step salaried rate, the system calculates the pay rate as follows:

  Schedule Amount ÷ (Schedule Days Worked x Schedule Hours/Day)

  or

  [(FTE x Schedule Amount) x (Days Worked ÷ Schedule Days Worked)] ÷ Pays/Year
- With pay period methods, the system calculates the pay rate by dividing the annual salary by the number of pays.
- With hourly and daily methods, you must enter the rate.
- With the per unit method, the system defaults the pay rate from the pay code. However, if you change the pay code's rate, the system does not automatically update the pay rate. To update it, you must display the Pay Rate Information detail page, and then press <Tab> through the Pay Method field.

Docking Rate

Rate for deducting leave without pay (LWOP) from the employee's gross pay. The docking rate only displays in the primary pay rate. Secondary rates can also generate a docking rate, but you only view the total rate in either the primary rate record or Docking Rate page.

Following are conditions affecting the docking rate, based on the setting in the primary rate's Override Type field:

S - System Calculate

The Docking Rate field is display-only.

- For Pay Period and Range/Step Pay pay methods, the system uses this equation: Docking Rate = Annual Salary ÷ (Days Worked x Hours/Day).
- For Hourly, Daily, and Range/Step Rate pay methods, the docking rate is the same as the pay rate.

When you add a secondary rate (Pay Period or Range/Step Pay methods) and the Include Dock field is selected, the docking rate is recalculated and is stored in the employee's primary rate. The new docking rate displays in the Docking Rate page, which displays before you reach the Organization section.

O - Override Rate

The pay method must be either Pay Period or Range/Step Pay, in which case you must enter the docking rate.

Dock Units

Total hours or days the employee has been docked during the current fiscal year. When you are setting up records for a new employee, the field is blank. The system subsequently tracks the dock units as attendance is added, taking from Leave without Pay pay codes (090-099). The field re-sets to zero during fiscal year-end processing.

Annual Salary

Annual gross wages under this rate. With the Pay Period pay method, you must enter the salary. For other methods, the salary is system-calculated.

The two per period pay methods, Pay Period and Rate/Step Pay, also allow entering rates for additional duties in the Additional Rates page. To display this page, click the Additional Rate button.

Paid

Year-to-date gross paid to the employee under this rate. The system uses this display-only field in conjunction with the Contract Limit field to determine the balance of pay remaining in a fiscal year for a contract employee.

Contract Section

Use the following fields to enter pay rate information for contract employees. This data applies to contract payoffs.

Contract Position
: Checkbox specifying whether the pay rate is for a contract position. Select the box if the employee's rate is under contract.

Occupied
: Checkbox indicating whether a pay rate's position is occupied or vacant.

- When you assign a position to a rate, the system selects the box, indicating the position is occupied. In this case, you cannot access the checkbox.
- When you update an occupied rate, you can use the Position Control page to vacate the position. This clears the checkbox.
- When you update a vacated rate, you can use the Position Control page to fill a position. This selects the box to indicate the position is occupied.

Contract Days
: Number of days in the employee's contract. This defaults from the salary schedule, if one applies; otherwise, the default is zero. If needed, you may change the displayed value.

Summer Pay
: Checkbox that determines whether the employee receives a summer payoff. Select the box if summer checks should be issued.

Contract Limit
: Maximum pay a contracted employee can receive in the year defined by the start and end dates.

- If the Contract Position checkbox is selected, the Contract Limit defaults from the Annual Salary field. You may change this if needed. Keep in mind that the employee's pay stops when the limit is reached.
- If the checkbox is not selected, you cannot replace the zero default.

Balance
: Year-to-date balance that remains unpaid on the rate's contract limit. The system calculates the balance using the following equation: Contract Limit - Paid to Date.

Organization Section

If the rate is under position control, the default distribution can only be changed in the position record.

Budget Unit
: Low organization for distributing the payroll expenses incurred under this pay rate. As indicated by the asterisks, the field's title is defined in the Human Resources Profile and may be different in your system.

Account
: Account for distributing gross pay under this rate. If the pay code assigned to a pay rate includes an Account code, this overrides the rate's account distribution. If needed, you may substitute a different account during timecard entry.

%
: Percentage of the rate to distribute to the budget unit-account combination.

Project Section

If the rate is under position control, the default project distribution can only be changed in the position record.

Project
: Project organization for distributing the rate's gross pay. As indicated by the asterisks, the field's title is defined in your Human Resources Profile and may be different in your system.

Account
: Project account for distributing the gross pay rate.

%
: Percentage of the rate to distribute to the project-account combination.

Assigning Positions to Existing Employees

Use Human Resources' Pay Rate Information page to assign a new positions to an existing employee.

Menu Path: Human Resources > Entry & Processing > Employee > Employee Information > search for and select an employee > select **Payroll Information** on the Action Bar, and then select **Pay Rates**

Procedure

Assigning a new position to an existing employee

1. Select Human Resources > Entry & Processing > Employee > Employee Information to display the Employee Information page.
2. In the Search Criteria section, enter criteria identifying the employees to list, and then click **Find**. To run an advanced search, use the **Advanced** button.

   Do not select the Include Terminated Employees checkbox. You cannot add positions to terminated or inactive rates.
3. Highlight the employee whose record you want to update.
4. On the Action Bar, select **Payroll Information**, and then select **Pay Rates**.
5. In the Pay Rate Information record center page, (Add New).
6. When the Question dialog displays, click **Yes** to use default rate information, such as the employee's calendar, start and end dates, and basic pay rate data, all which you may change if needed. Otherwise, click **No** to assign new pay rate information.
7. In the Class field, select a job class that is under position control, the press <Tab>.
8. In the Position Assignments page's Position field, select a position.
9. In the FTE field, enter the position's full-time equivalency value.

   For example, if the position is part-time and the employee works 20 hours in a 40-hour week, enter 0.5. If the position is full-time, enter 1.0. The field's default comes from the position record's Default FTE field.
10. Repeat Steps 8-9 for each additional position you want to assign.
11. Click (OK) when you finish entering the employee's positions.
12. Complete the fields, from the Pay Code field through the Contract Limit field.
13. Click (OK) as many times as needed to save the pay rate.

Note

The distributions in the Organization and Project sections can only be changed in the position's record in the Position table.

Updating Positions in Existing Pay Rates

Use the Position Control page to add to, change, vacate, or fill the positions in an employee's existing pay rate.

Menu Path: Human Resources > Entry & Processing > Employee > Employee Information > search for and select an employee > select **Payroll Information** on the Action Bar, and then select **Pay Rates**

Position Control Window

The Position Control window displays when you click the Positions item on the Pay Rate Information detail page's Action Bar for a rate that includes a job class under position control.

- If the rate’s positions are occupied, the window's buttons include Update, Vacate, and Cancel.
- If the rate’s positions are vacant, the window’s buttons include Update, Fill, Update and Fill, and Cancel.

Procedure

Adding to, vacating, or filling a pay rate’s positions

1. Select Human Resources > Entry & Processing > Employee > Employee Information to display the Employee Information page.
2. In the Search Criteria section, enter criteria identifying the employees to list, and then click **Find**. To run an advanced search, use the **Advanced** button.

   Do not select the Include Terminated Employees checkbox. You cannot add positions to terminated or inactive rates.
3. Highlight the employee whose record you want to update.
4. On the Action Bar, select **Payroll Information**, and then select **Pay Rates**.
5. In the Pay Rate Information record center, select the pay rate you want to update, and then click (OK).
6. In the Pay Rate Information detail page, click **Positions** on the Action Bar.

   The Position Control window displays. As noted above, the window's buttons depend on whether the rate’s positions are currently occupied.
7. Click one of the following buttons:

Update	Displays the Position Assignments page, which allows you to add to, change, or remove positions. Proceed to Step 8.
Fill	Occupies the rate’s positions, increasing its occupied FTE’s by the FTE’s stored in the Position Assignments page. This button only displays if the position is currently vacant. When a rate’s positions are occupied, the rate’s Occupied checkbox is selected.
Vacate	Vacates a position, decreasing its occupied FTE’s by the FTE’s stored in the Position Assignments page. This button only displays if the position is currently occupied. When a pay rate’s positions are vacant, the rate’s Occupied checkbox is not selected.
Update and Fill	Displays the Position Assignments page, which allows you to add to, change, or remove a positions. Proceed to Step 8.
Cancel	Closes the display without affecting the rate’s positions.

8. If you clicked the Update or Update and Fill button, the Position Assignments page displays. The page lists positions that are currently assigned to the pay rate.

   In the page's Positions fields, you can:

   - Change the position displayed by selecting another position.
   - Add another position by tabbing through to a blank field.
   - Delete a position by clicking Delete Row on the Action Bar.

   In the window's FTE fields, you can:

   - Change the FTE value of an existing position.
   - Accept or change the default for a newly-added position. The FTE value defaults from the position's record in the Position table.
9. Repeat Step 8 for each position you want to update, add, or delete.
10. Click (OK) to close the Position Assignments page.
11. In the Pay Rate Information detail page, complete the fields in the General, Calendar, Pay Rate Information, and Contract sections.

    For information on these fields, refer to Assigning Positions to New Employees (page 47).
12. Click (OK) as many times as needed to save the pay rate.

Note

The distributions in the Organization and Project sections can only be changed in the position's record in the Position table.

5: Position Control Reports

Use the options on the Human Resources > Reports > Position Control menu to generate reports on the positions set up for your district.

Preview

Position Control Reports Procedure

Use the following options on the Position Control Reports menu to generate reports on Position Control records:

Option	Report Title
Batch Status Summary	Batch Position Status Summary
Batch Status Detail	Batch Position Status Detail
Status Detail	Position Status Detail
Status Summary	Position Status Summary
Budget Tracking	Position Budget Tracking
Vacant Positions	Vacant Position

Menu Path: Human Resources > Reports > Position Control

Procedure

The options on the Position Control Reports menu use pages that have identical action items and fields. Following is the standard procedure used with these report options.

Generating Position Control reports

1. Select Human Resources > Reports > Position Control , and then select a report option.
2. In the report page, identify the records you want using the following fields in the Report Criteria section. For descriptions, refer to the Fields section below.
3. If needed, click **Sort** on the Action Bar to display a page for defining the report's sort order. After entering your settings, click (OK) to return to the report page.
4. Click (OK).
5. In the Print window, specify how you want to generate the report, and then click **OK**.

Fields

Following are descriptions of the fields in the Report Criteria section of Position Control reports pages:

Job Class
: Code identifying a record in Human Resources' Job Class table. You can select a job class from the drop-down list or leave the field blank to include all classes in a report.

Position
: Code identifying a record in Position Control's Position table. The job class and position combine to identify a specific position within a class.

- Select multiple positions by using the pipe symbol between each code. For example, *110|210|220* identifies the positions with these codes.
- Use the asterisk to include positions that begin with the same letter or letters. For example, *L** matches all codes that begin with L, including LEVEL1, LEVEL2, and LICENSED.
- Leave the field blank to select all positions for the classes and locations specified.

Location
: Code identifying a record in Human Resources' Location table. Leave the field blank to include all locations.

Batch Status Summary

Use this option to generate a concise report on the records stored in your Batch Position table. In addition to location, class, and position, the Batch Position Status Summary report lists the number of authorized, filled, and vacant FTE units per class/position. If a position's filled FTE's exceed its authorized FTE's, the message POSITION OVERFILLED appears after its listing.

The report's default file name is *batpos63.rpt*. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Batch Status Summary

Sample Batch Position Status Summary Report

```
SUNGARD                                                                                                          PAGE NUMBER:    1
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                                  BATPOS63
TIME: HH:MM:SS                                   BATCH POSITION STATUS SUMMARY REPORT                            SUMMARY

SELECTION CRITERIA: bposition.locn in ('1000','2000')


LOCATION                    CLASS                             POSITION         AUTH FTE    FILL FTE  VACANT FTE


1000 ADMIN CENTER           1010  DEPT MANAGER                ADMIN-1          2.000000    2.000000    0.000000
                            1030  SUPERVISOR                  ADMIN-1          4.000000    4.000000    0.000000
                            1040  TEAM LEADER                 ADMIN-1          5.000000    6.000000    0.000000  *POSITION OVERFILLED
                            2010  ADMIN ASSISTANT             ADMIN-1          3.000000    3.000000    0.000000
                            2020  SECRETARY                   ADMIN-1          6.000000    7.000000    0.000000  *POSITION OVERFILLED
                            2030  RECEPTIONIST                ADMIN-1          2.000000    2.000000    0.000000
                            2040  COMPUTER OPERATOR           ADMIN-1          3.000000    2.000000    1.000000
                            2050  CLERK/TYPIST I              ADMIN-1          7.000000    6.000000    1.000000
                            2060  CLERK/TYPIST II             ADMIN-1          4.000000    3.000000    1.000000

TOTAL LOCATION - 1000 ADMIN CENTER                                            36.000000   35.000000    3.000000
......................................................................................................................................
SUNGARD                                                                                                          PAGE NUMBER:    2
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                                  BATPOS63
TIME: HH:MM:SS                                   BATCH POSITION STATUS SUMMARY REPORT                            SUMMARY
SELECTION CRITERIA: bposition.locn in ('1000','2000')


LOCATION                    CLASS                             POSITION         AUTH FTE    FILL FTE  VACANT FTE


2000  ADMIN ANNEX           1020  ASST DEPT MANAGER           ADMIN-2          1.000000    1.000000    0.000000
                            1030  SUPERVISOR                  ADMIN-2          2.000000    2.000000    0.000000
                            2010  ADMIN ASSISTANT             ADMIN-2          2.000000    1.000000    1.000000
                            2020  SECRETARY                   ADMIN-2          3.000000    3.000000    0.000000
                            2030  RECEPTIONIST                ADMIN-2          1.000000    1.000000    0.000000
                            2040  COMPUTER OPERATOR           ADMIN-2          2.000000    2.000000    0.000000
                            2050  CLERK/TYPIST I              ADMIN-2          3.000000    2.000000    1.000000
                            2060  CLERK/TYPIST II             ADMIN-2          2.000000    3.000000    0.000000  *POSITION OVERFILLED

TOTAL LOCATION - 2000 ADMIN ANNEX                                             16.000000   15.000000    2.000000
......................................................................................................................................
SUNGARD                                                                                                          PAGE NUMBER:    3
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                                  BATPOS63
TIME: HH:MM:SS                                   BATCH POSITION STATUS SUMMARY REPORT                            SUMMARY

SELECTION CRITERIA: bposition.locn in ('1000','2000')

LOCATION                    CLASS                             POSITION         AUTH FTE    FILL FTE  VACANT FTE


TOTAL REPORT                                                                  52.000000   50.000000    5.000000
```


Batch Status Detail

Use this option to generate a detailed report on the status of the positions in your Batch Position table.

The Batch Position Status Detail report lists employee names and ID numbers, along with job classes, positions, locations, and full-time equivalency (FTE) values. If no employee rates are assigned to a batch position, the report provides the message POSITION NOT FILLED in place of the employee name.

The report's default file is *batpos73.rpt*. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Batch Status Detail

Including Terminated Rates

The Batch Status Detail option uses the standard report procedure , except a message displays after you click (OK) in the Batch Position Status Detail Report page:

Click **Yes** to include employee pay rates that have been terminated or **No** to exclude them. The code TERM identifies a terminated rate in the report.

Sample Batch Position Status Detail Report

```
SUNGARD                                                                                                   PAGE NUMBER:     1
DATE: MM/DD/YYYY                                          YOUR ORGANIZATION'S NAME                        BATPOS73
TIME: HH:MM:SS                                      BATCH POSITION STATUS DETAIL REPORT                   DETAIL

SELECTION CRITERIA: bposition.classify='2020'


SORT FIELD 1: LOCATION    SORT FIELD 2: CLASS    SORT FIELD 3: POSITION
                                                                                                 FILLED  VACANT/
 LOCATION                     CLASS                     POSITION     EMP NO     NAME                 AUTH FTE   FTE     OVER    STATUS

1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       17390      CASE, LORETTA T                     .000             TERM
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       15428      CHRISTMAN, JEAN L                  1.000
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       16651      FINDLAY, SUSAN P                    .500
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       14507      HAINES, KITTY W                    1.000
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       16228      LU, NANCY M                         .000             TERM
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       15244      MANN-BARNES, DIANE                 1.000
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       16195      PEREZ, VICKI A                     1.000
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       17003      RAIMES, MAXINE L                    .500
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       15420      STILES, TERRI B                    1.000
1000 ADMIN CENTER         2020 SECRETARY            ADMN-1       15824      WEST, ANNE D                       1.000
                                               ADMN-1 POSITION TOTAL                               6.000   7.000    -1.000  OVER

                               2020 SECRETARY TOTAL                                                6.000   7.000    -1.000  OVER

                       1000 ADMIN CENTER        TOTAL                                             13.000  12.000     1.000
.............................................................................................................................
SUNGARD                                                                                                   PAGE NUMBER:     2
DATE: MM/DD/YYYY                                          YOUR ORGANIZATION'S NAME                        BATPOS73
TIME: HH:MM:SS                                      BATCH POSITION STATUS DETAIL REPORT                   DETAIL

SELECTION CRITERIA: bposition.classify='2020'


SORT FIELD 1: LOCATION    SORT FIELD 2: CLASS    SORT FIELD 3: POSITION
                                                                                                 FILLED  VACANT/
 LOCATION                     CLASS                     POSITION     EMP NO     NAME                 AUTH FTE   FTE     OVER    STATUS

2000 ADMIN ANNEX          2020 SECRETARY            ADMN-2       16252      GREEN, HEATHER E                    .500
2000 ADMIN ANNEX          2020 SECRETARY            ADMN-2       16695      MYLES, CHRISTINE A                 1.000
2000 ADMIN ANNEX          2020 SECRETARY            ADMN-2       15883      NEEDHAM, LUANN S                   1.000
2000 ADMIN ANNEX          2020 SECRETARY            ADMN-2       14976      RICCI, DONNA V                      .600
                                               ADMN-2 POSITION TOTAL                               3.000   3.000    -1.000  OVER

                               2020 SECRETARY TOTAL                                                9.000  10.000    -1.000  OVER

                       2000 ADMIN ANNEX        TOTAL                                              12.000  13.000    -1.000  OVER
.............................................................................................................................
SUNGARD                                                                                                   PAGE NUMBER:     3
DATE: MM/DD/YYYY                                          YOUR ORGANIZATION'S NAME                        BATPOS73
TIME: HH:MM:SS                                      BATCH POSITION STATUS DETAIL REPORT                   DETAIL

SELECTION CRITERIA: bposition.classify='2020'


SORT FIELD 1: LOCATION    SORT FIELD 2: CLASS    SORT FIELD 3: POSITION
                                                                                                 FILLED  VACANT/
 LOCATION                     CLASS                     POSITION     EMP NO     NAME                 AUTH FTE   FTE     OVER    STATUS

3000 OPERATIONS BLDG      2020 SECRETARY            ADMN-3                  POSITION NOT FILLED    2.000    .000     2.000
```

Status Detail

Use this option to generate a detailed report listing employees by locations and positions. The report includes employees' ID numbers and names, and the authorized, filled, and vacant FTE values associated with each position.

- If a position's occupied FTE's exceed its authorized FTE's, the code OVER appears next to the position's totals, and the total of the Vacant/Over column appears as a negative number.
- If a position has no occupied FTE's, the message POSITION NOT FILLED appears in place of an employee's name.

The report's default file name is *updpos73.rpt*. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Status Detail

Including Employees with Occupied Rates

The Status Detail option uses the standard report procedure , except a message displays after you click (OK) in the Position Status Detail Report page:

Click **Yes** to limit the report to employees whose pay rates are occupied or **No** to include all employee rates whether occupied or not. A pay rate is occupied (filled) if its Occupied checkbox is selected.

If you select No and an unoccupied rate appears in the report, the report's Filled FTE column will include the rate's FTE value. As a result, the filled FTE's shown and resulting vacant FTE's will be incorrect. To alert you to this, the following message is included: **WARNING: CALCULATED VACANCIES DO NOT MATCH ACTUAL.

Sample Position Status Detail Report

```
SUNGARD                                                                                                         PAGE NUMBER:   1
DATE: MM/DD/YYYY                                    YOUR ORGANIZATION'S NAME                                    UPDPOS73
TIME: HH:MM:SS                                     POSITION STATUS DETAIL REPORT                                DETAIL

SELECTION CRITERIA: position.classify matches 'C*' and position.locn-'LINC'


SORT FIELD 1: LOCATION    SORT FIELD 2: CLASS    SORT FIELD 3: POSITION
                                                                                                            FILLED  VACANT/
 LOCATION                    CLASS                      POSITION     EMP NO    NAME                  AUTH FTE   FTE     OVER

LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       16932     ASHBROOK, BELINDA H                1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       15804     FARRAR, THOMAS N                   1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       17356     KNIGHT, PHOEBE R                   1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       17544     MORRIS-WENDT, CYNTHIA L            1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       16219     MCCLOSKY, RONALD M                 1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       14802     PARSONS, JULIA K                   1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       16722     ONEAL, CHARLES S                   1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       17087     SCHILLING, BARRY A                 1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       13941     WILLIAMS, ASHLEY G                 1.000
LINC LINCOLN ELEMENTARY   CREL CERTFD ELEMENTARY TEACHER 111000       16673     YOUNG, LISA R                      1.000
                                   241070 POSITION TOTAL                                             12.000  10.000    2.000

LINC LINCOLN ELEMENTARY   CRSP CERTFD SPECIAL EDUCATION  121000       17489     KILLIAN, ANDREA D      1.500    .500    1.000


LINC LINCOLN ELEMENTARY   CROT CERTFD OTHER TEACHERS     131000       16938     BARR, GERALD N                     1.000
LINC LINCOLN ELEMENTARY   CROT CERTFD OTHER TEACHERS     131000       17412     HINKLE, DUANE F                    1.000
LINC LINCOLN ELEMENTARY   CROT CERTFD OTHER TEACHERS     131000       17385     RUTKOWSKI, SHARON S                1.000
                                   241070 POSITION TOTAL                                              3.000   3.000     .000

                       LINC LINCOLN ELEMENTARY TOTAL                                                 16.500  13.500    3.000
```

Status Summary

Use this option to generate a report on the status of records in your Position table. The Position Status Summary Report shows the number of authorized, filled, and vacant FTE's for positions at each location.

The report's default file name is *updpos53.rpt*. Since this is also the default for Position Control's Position Table report, you may want to change the name to avoid overwriting an existing file. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Status Summary

Sample Position Status Summary Report

```
SUNGARD                                                                                                      PAGE NUMBER:   1
DATE: MM/DD/YYYY                                    YOUR ORGANIZATION'S NAME                                 UPDPOS53
TIME: HH:MM:SS                                     POSITION STATUS SUMMARY REPORT                            SUMMARY

SELECTION CRITERIA: position.classify matchs 'C*' and position.locn in ('LINC','JEFF')

LOCATION                    CLASS                             POSITION         AUTH FTE    FILL FTE  VACANT FTE


JEFF  JEFFERSON ELEMENTARY  CREL  CERTFD ELEMENTARY TEACHER  111000          12.000000   10.000000    2.000000
                            CRSP  CERTFD SPECIAL EDUCATION   121000           1.500000    0.500000    1.000000
                            CROT  CERTFD OTHER TEACHERS      131000           3.000000    3.000000    0.000000

TOTAL LOCATION - JEFF JEFFERSON ELEMENTARY                                   16.500000   13.500000    3.000000

LINC  LINCOLN ELEMENTARY    CREL  CERTFD ELEMENTARY TEACHER  112000          10.000000    9.000000    1.000000
                            CRSP  CERTFD SPECIAL EDUCATION   122000           1.000000    1.000000    0.000000
                            CROT  CERTFD OTHER TEACHERS      132000           5.000000    3.000000    2.000000

TOTAL LOCATION - LINC LINCOLN ELEMENTARY                                     16.000000   13.000000    3.000000

TOTAL REPORT                                                                 32.500000   26.500000    6.000000
```


Budget Tracking

Use this option to generate a report showing positions and their budgeted, actual, and projected salary amounts. Salary amounts only appear under the following conditions:

- The Position Control field in your Human Resources Profile must be set to Y - Use Position Control.
- The Track Position Salaries checkboxes in the pay codes associated with the positions must be selected.

Besides the salary figures, the Position Budget Tracking report also includes the job class, position, and location codes for each position.

The report's default file name is *updpo103.rpt*. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Budget Tracking

Sample Position Budget Tracking Report

```
SUNGARD                                                                                                                  PAGE NUMBER:   1
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                                          UPDPO1O3
TIME: HH:MM:SS                                       POSITION BUDGET TRACKING REPORT                                     SUMMARY

SELECTION CRITERIA: position.locn in ('LINC','JEFF')
                                                                                   BUDGETED           ACTUAL          ACTUAL
LOCATION                    CLASS                              POSITION              SALARY           SALARY          BUDGET

JEFF  JEFFERSON ELEMENTARY  CREL  CERTFD ELEMENTARY TEACHER  111000              480,000.00       155,310.15      240,000.00
                            CRSP  CERTFD SPECIAL EDUCATION   121000               60,000.00        12,295.38       20,000.00
                            CROT  CERTFD OTHER TEACHERS      131000              105,000.00        48,830.71       52,500.00

TOTAL LOCATION - JEFF                                                            645,000.00       216,436.24      322,500.00

LINC  LINCOLN ELEMENTARY    CREL  CERTFD ELEMENTARY TEACHER  112000              400,000.00       145,964.39      200,000.00
                            CRSP  CERTFD SPECIAL EDUCATION   122000               40,000.00        18,377.10       20,000.00
                            CROT  CERTFD OTHER TEACHERS      132000              175,000.00        68,008.65       87,500.00

TOTAL LOCATION - LINC                                                            615,000.00       232,350.14      307,500.00

TOTAL REPORT                                                                   1,260,000.00       448,786.38      630,000.00
```

Vacant Positions

Use this option to generate a list of positions that are unfilled. Besides location, job class, and position codes, the Vacant Position report shows the authorized, filled, and vacant FTE's for each position.

A position has vacancies if its occupied FTE's are less than its Authorized FTE's: Authorized FTE's - Occupied FTE's = Vacant FTE's).

The Vacant Position report's default file name is *updpos63.rpt*. For the standard procedure for generating reports, refer to Position Control Reports Procedure (page 58).

Menu Path: Human Resources > Reports > Position Control > Vacant Positions

Sample Vacant Position Report

```
SUNGARD                                                                                                                 PAGE NUMBER:   1
DATE: MM/DD/YYYY                                       YOUR ORGANIZATION'S NAME                                         UPDPOS63
TIME: HH:MM:SS                                          VACANT POSITION REPORT                                          SUMMARY

SELECTION CRITERIA: position.classify matches 'C*' and position.locn in ('LINC','JEFF')


LOCATION                    CLASS                             POSITION         AUTH FTE    FILL FTE   VACANT FTE


JEFF  JEFFERSON ELEMENTARY  CREL  CERTFD ELEMENTARY TEACHER  111000          12.000000   10.000000     2.000000
                            CRSP  CERTFD SPECIAL EDUCATION   121000           1.500000    0.500000     1.000000

TOTAL LOCATION - JEFF JEFFERSON ELEMENTARY                                   13.500000   10.500000     3.000000

LINC  LINCOLN ELEMENTARY    CREL  CERTFD ELEMENTARY TEACHER  112000          10.000000    9.000000     1.000000
                            CROT  CERTFD OTHER TEACHERS      132000           5.000000    3.000000     2.000000

TOTAL LOCATION - LINC LINCOLN ELEMENTARY                                     15.000000   12.000000     3.000000

TOTAL REPORT                                                                 28.500000   22.500000     6.000000
```


6: Highly Qualified Teacher Records

The Human Resources System and Position Control System enable you to maintain records on teachers' qualifications for Highly Qualified Teacher status.

Preview

Highly Qualified Teacher Reference Tables

Highly Qualified Teacher reporting relies on two sets of Personnel tables that are used to document a teacher's qualifications. One set relates directly to Human Resources, while the other applies to the eFinancePLUS Position Control System.

Human Resources

The following tables are used in Human Resources to determine teachers' qualifications relative to Highly Qualified Teacher standards:

Credential Code	Qualification Method	Requirement Code
Qualification Code	Qualification Status	

Position Control

Position Control uses all of the Human Resources tables that apply to Highly Qualified Teachers records, , with the exception of Credential Code. In addition, it provides the following tables for maintaining Highly Qualified Teacher records:

Certification Area	Degree Subject	Qualification Method
Certification Type	Degree Subject Type	Qualification Status
Degree	Qualification Code	Requirement Code
Degree Level		

The tables are listed alphabetically for easy reference. However, two of the tables use codes from related tables, and therefore, the related tables must be completed first:

Primary Table	**Related Table (complete first)**
Degree	Degree Level
Degree Subject	Degree Subject Type

Preview

The following sections discuss the tables used in Highly Qualified Teacher reporting:

Certification Area Table

Use the Certification Area Table page to set up records on the disciplines or subjects associated with employees' certifications. The Certification Area table is used in Human Resources for creating employee records and in Position Control for setting up Highly Qualified Teacher information related to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *cert_area.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Certification Areas

Certification Codes in Position Control

Certification codes are entered in Position Control's Certification Code Setup page, which is used when creating and updating position records.

- If you are adding a position in the New Position page, the Certification Code Setup page displays in the sequence of Highly Qualified Teacher pages provided after you complete the position record.
- In the Edit Position, Batch Position Edit, and Mass Update Positions pages, you can display the Certification Code Setup page by clicking the Degrees button.

For related information, refer to Certification Code Setup Page (page 86).

Certification Type Table

Use the Certification Type Table page for either categorizing or defining the types of certifications employees earn. This table is used in Human Resources to assign certifications to employees and in Position Control to set up Highly Qualified Teacher information related to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *certtype.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Certification Types

Certification Types in Position Control

Certification codes are entered in Position Control's Certification Code Setup page, which is used in creating and updating position records.

- If you are adding a position in the New Position page, the Certification Code Setup page displays in the sequence of Highly Qualified Teacher pages provided after you complete the position record.
- In the Edit Position, Batch Position Edit, and Mass Update Positions pages, you can display the Certification Code Setup page by clicking the Certifications button.

For related information, refer to Certification Code Setup Page (page 86).

Credential Code Table

The Credential Code Setup page enables you to identify employee credentials. These codes are is used in Human Resources to assign credentials to employees. This section explains how the Credential Code table relates to Highly Qualified Teacher records.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *hq_cred.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Certification Areas

Credential Codes in Human Resources

Credential codes are entered in the Credential Data Setup page, which is used to enter employee credentials related to Highly Qualified Teacher records.

- If you are adding an employee, the Credential Data page displays in the sequence of pages used in the add process.
- If you are changing an employee, you can display the Credential Data page by clicking Personnel Information > Credentials on the Employee Information page's Action Bar.

For related information, refer to Certification Code Setup Page (page 86).

Degree Table

The Degree Table page enables you to enter educational information on your employees. These codes are used in Human Resources to identify the degrees earned by employees and in Position Control to set up Highly Qualified Teacher information related to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *degrees.rpt*.

Menu Path: Human Resources > Reference Tables > Education > Degrees

Degree Codes in Position Control

Degree codes are entered in the following Position Control pages:

- General Degree Linking - links codes from the Degree Level table with codes from the Degree Subject Type table.
- Degree Linking - links codes from the Degree table with codes from the Degree Subject table.

Both of these pages can be accessed from the Degree Linking Selection page.

- If you are adding a position in the New Position page, the Degree Linking Selection page displays after you complete the Link Qualified Area to Position, Certification Code Setup, and Link Requirement fields.
- If you are changing a position in the Edit Position page you can display the Degree Linking Selection page by clicking the Degrees button. The path for accessing the Edit Position page: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click (OK).

For information on using these pages to set up degree-related requirements, refer to Highly Qualified Teachers: Position Control (page 83).

Degree Level Table

The Degree Level Table page enables you to assign a numeric code to specify the level of a degree an employee holds, such as 1 for Bachelor, 2 for Bachelor+15 Credits, and 3 for Master. These codes are used in Human Resources when setting up the Degree table and in Position Control when linking Highly Qualified Teacher information to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *deglev.rpt*.

Menu Path: Human Resources > Reference Tables > Education > Degree Levels

Degree Level Codes in Position Control

Degree Level codes are entered in the General Degree Linking page, which is used to link Degree Level codes to Degree Subject Type codes when creating and updating position records. You can access the page from the Degree Linking Selection page.

- If you are adding a position in the New Position page, the Degree Linking Selection page displays after you complete the Link Qualified Area to Position, Certification Code Setup, and Link Requirement fields.
- If you are changing a position in the Edit Position page, you can display the Degree Linking Selection page by clicking the Degrees button. The path for accessing the Edit Position page: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click (OK).

For additional information on using these pages to set up degree-related requirements for positions, refer to Highly Qualified Teachers: Position Control (page 83).

Degree Subject Table

The Degree Subject Table page enables you to identify the subjects associated with employees' degrees in Human Resources. In Position Control, codes from the table are used in setting up Highly Qualified Teacher information related to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *subtype.rpt*.

Menu Path: Human Resources > Reference Tables > Education > Degree Subjects

Degree Subject Codes in Position Control

Degree Subject codes are entered in the Degree Linking page, which is used to link Degree Subject codes to Degree codes when creating and updating position records. You can access the page from the Degree Linking Selection page.

- If you are adding a position in the New Position page, the Degree Linking Selection page displays after you complete the Link Qualified Area to Position, Certification Code Setup, and Link Requirement fields.
- If you are changing a position in the Edit Position page, you can display the Degree Linking Selection page by clicking the Degrees button. The path for accessing the Edit Position page: Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position > click (OK)

For additional information on using these pages to set up degree-related requirements for positions, refer to Highly Qualified Teachers: Position Control (page 83).

Degree Subject Type Table

The Degree Subject Type page enables you to classify the subjects associated with employee educational backgrounds. For example, you could create Subject Type records to categorize Algebra, Geometry, and Trigonometry as Mathematics and Biology, Chemistry, and Physics as Science.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *subtype.rpt*.

Menu Path: Human Resources > Reference Tables > Education > Degree Subject Types

Degree Subject Type Codes in Position Control

Degree Subject Type codes are entered in the General Degree Linking page, which is used in Position Control to link subject types and degree levels. You can access the page from the Degree Linking Selection page.

- If you are adding a position in the New Position page, the Degree Linking Selection page displays after you complete the Link Qualified Area to Position, Certification Code Setup, and Link Requirement fields.
- If you are changing a position in the Edit Position page, you can display the Degree Linking Selection page by clicking the Degrees button.

For additional information on degree-related requirements, refer to Highly Qualified Teachers: Position Control (page 83).

Qualification Code Table

Use the Qualification Code Setup page to create qualifications related to Highly Qualified Teacher records in Human Resources and Position Control. These codes are used in Human Resources to link qualifications to assignments and in Position Control to link qualifications to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *hq_qual.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Qualification Codes

Qualification Codes in Human Resources

Qualification codes are entered in the following Human Resources pages:

Qualifications Data page , which is used to enter employee qualifications related to Highly Qualified Teacher records.

- If you are adding an employee, the Qualifications Data page displays as one of the sequence of pages used in the add process.
- If you are changing an employee, you can display the Qualifications Data page by clicking Personnel Information > Qualifications on the Employee Information page's Action Bar.

For related information, refer to Highly Qualified Teachers: Human Resources (page 78).

Assignment Code Table page, which you can use to create assignment codes and link them to Qualification codes (Highly Qualified Area field).

For information on the Assignments table, refer to the Personnel Tables chapter of your Human Resources manual.

Assignments page, which you can use to enter employees' assignments and link them to Qualification codes (Highly Qualified Area field).

- If you are adding an employee, the Assignments page displays in the series of pages used during the add process.
- If you are changing an employee's records, you can display the Assignments page by clicking Personnel Information > Assignments on the Employee Information page's Action Bar.

For information on the Assignments page, refer to Highly Qualified Teachers: Human Resources (page 78).

Qualification Codes in Position Control

Qualifications codes are entered in the following Position Control page:

Link Qualified Area to Position page, which is used link positions to Qualifications codes.

- If you are adding a position in the New Position page, the Link Qualified Area to Position page displays in the series of Highly Qualified Teacher pages that display after you complete the position record.
- In the Edit Position, Batch Position Edit, and Mass Update Positions pages, you can display the Link Qualified Area to Position page by clicking the Qualifications button.

Qualification Methods Table

Use the Qualification Method Code Setup page to create codes identifying the evaluation methods related to Highly Qualified Teacher requirements. These codes are used in Human Resources to determine teachers' qualifications and in Position Control to link qualifications to positions.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *hq_meth.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Qualification Methods

Qualification Method Codes in Human Resources

Qualification Method codes are entered in the following Human Resources pages:

Qualifications Data page, which is used to enter employee qualifications related to Highly Qualified Teacher records. This page ties Qualification codes to Qualification Method codes.

- If you are adding an employee, the Qualifications Data page displays in the series of pages used in the add process.
- If you are changing an employee, you can display the Qualifications Data page by clicking Personnel Information > Qualifications on the Employee Information page's Action Bar.

For related information, refer to the Highly Qualified Teachers: Human Resources (page 78).

Assignments page, where you can enter employees' assignments and link them to Qualification (Highly Qualified Area field) and Qualification Method (Highly Qualified Method field) codes.

- If you are adding an employee, the Assignments page displays in the series of pages used in the add process.
- If you are changing an employee's records, you can display the Assignments page by clicking Personnel Information > Assignments on the Employee Information page's Action Bar.

For information on the Assignments page, refer to Highly Qualified Teachers: Human Resources (page 78).

Qualification Status Table

Use the Qualification Status Code Setup page to create records in Human Resources identifying the status of teachers in regard to Highly Qualified Teacher requirements.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *hq_stat.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Qualification Statuses

Qualification Status Codes in Human Resources

Qualification Status codes are entered in the Qualifications Data page, which is used to enter employee qualifications related to Highly Qualified Teacher records. In addition to status codes, each record in this page links Qualification codes to Qualification Method codes.

- If you are adding an employee, the Qualifications Data page displays as one of the series of pages used in the add process.
- If you are changing an employee, you can display the Qualifications Data page by clicking Personnel Information > Qualifications on the Employee Information page's Action Bar.

For related information, refer to the Highly Qualified Teachers: Human Resources (page 78).

Requirement Code Table

Use the Requirement Code Setup page to create codes for requirements related to Highly Qualified Teacher status. These codes are used in both Human Resources and Position Control.

For a report on the table's records, click (Print) after generating a list of records. The report's default file name is *hq_req.rpt*.

Menu Path: Human Resources > Reference Tables > Personnel > Requirement Codes

Requirement Codes in Human Resources

Requirement codes are entered in the Requirement Data page, which is used to assign Requirement codes to employees.

- If you are adding an employee, the Requirement Data page displays as one of the sequence of pages used in the add process.
- If you are changing an employee's records, you can display the Requirement Data page by clicking Personnel Information > Requirements in the Employee Information page's Action Bar.

For information on this page, refer to Highly Qualified Teachers: Human Resources (page 78).

Requirement Codes in Position Control

Requirement codes are entered in the Link Requirement to Position page, which is used to tie Highly Qualified Teacher requirements to positions.

- If you are adding a position in the New Position page, the Link Requirement to Position page displays after you complete a position.
- In the Edit Position, Batch Position Edit, and Mass Update Positions pages, you can display the Link Requirement to Position page by clicking the Requirements button.

For information on these pages, refer to Highly Qualified Teachers: Position Control (page 83).

Highly Qualified Teachers: Human Resources

Human Resources provides two main pages for determining the status of teachers in regards to Highly Qualified Teacher requirements.

Qualified Teacher Course Data Page

Use this page to add new course records, and change, delete, and print existing records. The page includes three tabs:

- Course
- Staff
- Qualifications

Employee Information Page

Use this page to add and update teachers' assignments, requirements, credentials, and qualifications. The Employee Information page provides access to four pages associated with Highly Qualified Teacher requirements:

- Assignments
- Credential Data
- Qualification Data
- Requirement Data

You can also access these pages when adding a new employee.

Preview

The following sections discuss the pages used in Human Resources for creating and maintaining Highly Qualified Teacher records:

Qualified Teacher Course Data Page

Use this page to define teacher requirements for Highly Qualified Teacher status for specific courses. In this page, you can search for and list Qualified Teacher Course records, add new records, change, delete, and print records.

Menu Path: Human Resources > Entry & Processing > Employee > Qualified Teacher Course Data

Tabs

The Qualified Teacher Course Data page includes the following tabs:

Course	Use this tab to define the school year, building, course, and course section. You also can designate a course for summer school, assign the state course equivalent, and enter a description.
Staff	Use this tab to add and change the teachers linked to a course and its sessions. You also can define the number of students in the course and designate the course as Primary in relation to Highly Qualified Teacher standards.
Qualifications	Use this tab to assign codes identifying the qualifications associated with a course and designate selected qualifications as required.

Procedures

Following are the procedures for using the Qualified Teacher Course Data page to add, delete, and print course records.

Adding a course record

1. Select Human Resources > Entry & Processing > Employee > Qualified Teacher Course Data.
2. In the Qualified Teacher Course Data page, click (Add New).
3. Complete the fields in the Course, Staff, and Qualifications tabs. For field descriptions, refer to the Fields section below.

   Click **Delete Row** on the Action Bar to delete rows in the Staff and Qualifications tabs.

4. Click (OK) to save the record.

Deleting a course record

1. Select Human Resources > Entry & Processing > Employee > Qualified Teacher Course Data.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. Click (OK).
4. In the List section, select a record.
5. Click (Delete).
6. In the confirmation dialog, click **Yes**.

Generating the Student Course Table report

1. Select Human Resources > Entry & Processing > Employee > Qualified Teacher Course Data.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.

3. Click (OK).
4. Click (Print).
5. In the Print window, specify how you want to generate the report, and then click **OK**. The report's default file name is *stud_course.rpt*.

Fields

Following are descriptions of the fields in the Qualified Teacher Course Data page’s Course, Staff, and Qualifications tabs.

Course Tab

School Year
: Four-digit year that applies to the course.

Building
: Location code identifying a school district building. The field’s drop-down list displays all records in Security’s Location Codes table.

Course
: Code or short title identifying a course, such as 8050 or ALGEBRA I. [Character/10]

Course Section
: Number identifying a course section [Small Integer]

Summer School
: Checkbox indicating whether the course is taught in summer school. Select the checkbox if summer school applies.

  If your district distinguishes regular year courses from summer school courses, you can create separate records for each, one with the checkbox selected and the other with the checkbox cleared. All other data can be the same.

State Course Equivalent
: Code or title used by the state to identify the course that is the equivalent of the one taught in your district. [Character/10]

Description
: Course description or extended title. This field is especially important if you use codes to identify courses. Optional. [Character/25]

Staff Tab

Course Session
: User-defined numeric code identifying a session. You also can use a number more than once if more than one teacher is assigned to the session. [Small Integer]

Primary
: Checkbox indicating whether the teacher being added is the primary person responsible for a course or course session.

  You can select the checkbox for as many sessions/teachers as needed, for example, if a teacher is responsible for more than one course or if a session has more than one primary teacher.

  You must either select the checkbox or clear it. You cannot leave the box at its default.

Employee Number

ID number identifying the teacher assigned to the session. If needed, you can assign a teacher to more than one session.

To search for and select a teacher, click (Lookup) to display the Employee Lookup page.

Name

First and last name associated with the ID entered. Display only.

Students

Enter the number of students who can be scheduled into the course. [Integer]

Qualifications Tab

Qualified Area

Select a code from Qualification Code table. You can include up to 15 qualifications per course.

Required

Checkbox indicating whether a teacher must have the qualification selected in order to teach course. Select the box if the qualification is required.

Sample Student Course Report

```
SUNGARD                                                                          PAGE NUMBER:    1
DATE: MM/DD/YYYY                        YOUR ORGANIZATION'S NAME                 UPDSTUCRSE
TIME: HH:MM:SS                            STUDENT COURSE TABLE

SELECTION CRITERIA: stu_course.school_year='2012' and stu_course.building='1010'

SCHOOL YEAR  BUILDING  COURSE       COURSE SECTION  SUMMER SCHOOL  STATE EQUIVALENT  DESCRIPTION

2012         1010      ART I        1               N              72-6400           ART HISTORY
2012         1010      ART II       2               N              72-6410           ART APPRECIATION
2012         1010      ENGLISH I    1               Y              30-2100           CP ENGLISH I
2012         1010      ENGLISH I    2               Y              30-2200           GEN ENGLISH I
2012         1010      ENGLISH II   1               Y              30-2110           CP ENGLISH II
2012         1010      ENGLISH II   2               Y              30-2210           GEN ENGLISH II
2012         1010      ENGLISH III  1               Y              30-2120           CP ENGLISH III
2012         1010      ENGLISH III  2               Y              30-2220           GEN ENGLISH III
2012         1010      HISTORY I    1               Y              54-5520           HIST OF WEST CIV
2012         1010      HISTORY II   1               N              54-5550           WORLD HISTORY
2012         1010      HISTORY III  1               N              54-5570           20TH CENTURY HIS
2012         1010      PSYCHOLOGY   1               N              57-2880           INTRO TO PSYCH
2012         1010      SOCIOLOGY    1               N              57-1640           INTRO TO SOC
```

Employee Information Page

You can use the Employee Information page to access pages for documenting teachers' qualifications as they relate to Highly Qualified Teacher standards.

Menu Path: Human Resources > Entry & Processing > Employee > Employee Information

Employee Pages

You also can access the following pages from the Employee Information page' Action Bar. The pages also are available when adding records for a new employee. For complete information on these pages, refer to your Human Resources manual.

Assignments Page

Use the Assignments page to link codes in the Qualification Code and Qualification Methods tables to teachers' assignments. The page's Assignments field references the Assignments table, which includes a Highly Qualified Area field.

To display the page, click Personnel Information > Assignments on the Employee Information page's Action Bar.

Important

For a teacher to receive Highly Qualified Teacher status in the Qualified Teacher Course report, the Assignments page's Highly Qualified Area field must have the same Qualification code as the one in the Assignments table record's Highly Qualified Area field. For additional information, refer to Qualified Teacher Course Report (page 91).

Qualification Data Page

The Qualification Data page enables you to assign Qualification codes to an employee, along with the Qualification Methods required for fulfilling these requirements and the Qualification Status of each.

The Qualification Data page also allows you to enter relevant dates and indicate whether the qualifications are active or inactive. In addition, you can use the page's Notes item to enter text on the employee's qualifications.

To display the page, click Personnel Information > Qualifications on the Employee Information page's Action Bar.

Credential Data Page

Use the Credential Data page to enter an employee's credentials in relation to Highly Qualified Teacher requirements. The page accepts codes from the Credential Code table, as well as dates and brief notes.

To display the page, click Personnel Information > Credentials on the Employee Information page's Action Bar.

Requirement Data Page

Use the Requirement Data page to enter information regarding the requirements an employee has fulfilled for Highly Qualified Teacher status. The page accepts codes from the Requirement Code table, as well as relevant dates and notes.

These requirements are also referenced by Position Control's Link Requirement to Position page, which ties requirements and positions together.

To display the page, click Personnel Information > Requirements on the Employee Information page's Action Bar.

Highly Qualified Teachers: Position Control

Position Control provides several pages for linking Highly Qualified Teacher requirements to positions. This topic provides information on accessing these pages, as well as the procedures to follow for updating Highly Qualified Teacher records in Position Control.

Action Buttons

The following pages can be displayed using the action buttons displayed on Position Control's Edit Position and Batch Position Edit pages. The pages also display in the order shown after you add a position in the New Position page.

Action Button	Page	Description
Qualifications	Link Qualified Area to Position	Links Qualification codes from the Qualification Code table to positions.
Certifications	Certification Code Setup	Links codes from the Certification Type and Certification Area tables to positions.
Requirements	Link Requirement to Position	Links codes from the Requirement Code table to positions.
Degrees	Degree Linking Selection	The page provides a wizard that displays the following pages: General Degree Linking - links degree levels to subject types. Degree Linking - links degree types to subjects. The Degrees button is not available on the Batch Position Edit page.

Note

You can update Qualifications, Certifications, and Requirements for multiple positions using Action Bar items on Position Control's Mass Update Positions page. For information, refer to Mass Update Positions Page (page 90).

Procedures

For details on completing the Highly Qualified Teacher pages listed above, refer to the topics in the Preview section.

Linking Highly Qualified Teacher requirements in the Edit Position page

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. In the Search Criteria section, enter criteria identifying the records to list, and then click **Find**. To run an advanced search, use the **Advanced** button.
3. In the List section, select the record you want to update, and then click (OK).
4. In the Edit Position page, update the fields in the Position, FTE, Salary, and Financial sections as needed.
5. To update the position's Highly Qualified Teacher records, click the Action buttons to display the pages listed above.
6. Click (OK) to save the record.

Linking Highly Qualified Teacher requirements in the New Position page

1. Select Human Resources > Entry & Processing > Position Control > Position Control to display the Position Control page.
2. Click (Add New).
3. Complete the fields in the Position, FTE, and Salary sections as needed. For field descriptions, refer to New Position Page (page 19).
4. In the Financial section, click (OK) when you complete your entries in the project-related fields. If you do not use project accounting, click (OK) when you reach the first *Project* field.
5. The pages listed above display in the order shown. Click (OK) to complete each page.

   Note that the Degree Link Selection page uses a wizard to access the General Degree Linking and Degree Linking page.
6. Click **Finish** in the Degree Linking page to save the position.

   The position is also saved by clicking Cancel in either the Degree Linking Selection or General Degree Linking page.

Preview

The following sections discuss the pages used in Position Control to add Highly Qualified Teacher information to position records:

Link Qualified Area to Position Page

Use this page to link codes from the Qualification Code table to a position. The Link Qualified Area to Position page can be accessed from the following pages:

New Position Page	Displays the linking page after you add a new position. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > click (Add New)
Edit Position Page	Displays the linking page when you click the Qualifications button while updating a position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position, and then click (OK)
Mass Update Positions Page	Displays the linking page when you click Qualifications on the Action Bar before mass updating selected position records. The mass update adds requirements to all positions selected. For details, refer to Mass Update Positions Page (page 90). **Menu Path:** Human Resources > Periodic Routines > Position Control > Mass Update Positions
Batch Position Edit Page	Displays the linking page after adding a batch position or when you click Qualifications while updating a batch position. **Menu Path:** Human Resources > Entry & Processing > Position Control > Batch Position Control > search for and select a position, and then click (OK)

Procedure

Linking qualifications to a position

1. Display the Link Qualified Area to Position page from one of the pages listed above.
2. In the Code field, select a code from the drop-down list, which includes all records in the Requirement Code table.
3. To add another qualification, repeat Step 2.
4. If you accessed the linking page from the Edit Position page, you can delete existing qualifications.

   To delete a qualification, position the cursor on the qualification's row, and then click **Delete Row** on the Action Bar.

5. Click (OK).

Certification Code Setup Page

Use this page to link codes from the Certification Type and Certification Areas tables to a position. The Certification Code Setup page can be accessed from the following pages:

New Position Page	Displays the linking page after you add a new position and complete the qualification linking page. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > click (Add New)
Edit Position Page	Displays the linking page when you click the Certifications button while updating a position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position, and then click (OK)
Mass Update Positions Page	Displays the linking page when you click Certifications on the Action Bar before mass updating selected position records. The mass update adds requirements to all positions selected. For details, refer to Mass Update Positions Page (page 90). **Menu Path:** Human Resources > Periodic Routines > Position Control > Mass Update Positions
Batch Position Edit Page	Displays the linking page after adding a batch position or when you click Certifications button while updating a batch position. **Menu Path:** Human Resources > Entry & Processing > Position Control > Batch Position Control > search for and select a position, and then click (OK)

Procedure

Linking certification information to a position

1. Display the Certification Code Setup page from one of the pages listed above.
2. In the Certification Type field, select a code from the drop-down list, which includes all records from the Certification Type table.
3. In the Certification Area field, select a code from the drop-down list, which includes all records in the Certification Area table.
4. To link additional certification records, repeat Steps 1-2.
5. If you accessed the linking page from the Edit Position page, you can delete certification records.

   To delete a record, position the cursor on the record's row, and then click the **Delete Row** on the Action Bar.

6. Click (OK).

Link Requirement to Position Page

Use this page to link codes from the Requirement Code table to a position. The Link Requirement to Position page can be accessed from the following pages:

New Position Page	Displays the linking page after you add a new position and complete the qualification and certification linking pages. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > click (Add New)
Edit Position Page	Displays the linking page when you click the Requirements button while updating a position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position, and then click (OK)
Mass Update Positions Page	Displays the linking page when you click Requirements on the Action Bar before mass updating selected position records. The mass update adds requirements to all positions selected. For details, refer to Mass Update Positions Page (page 90). **Menu Path:** Human Resources > Periodic Routines > Position Control > Mass Update Positions
Batch Position Edit Page	Displays the linking page when you click the Requirements button while adding or updating a batch position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Batch Position Control > search for and select a position, and then click (OK)

Procedure

Linking requirements to a position

1. Display the Link Requirement to Position page from one of the pages listed above.
2. In the Code field, select a code from the drop-down list, which includes all records in the Requirement Code table.
3. To add another requirement, repeat Step 2.
4. If you accessed the linking page from the Edit Position page, you can delete existing requirements.

   To delete a requirement, position the cursor on the requirement's row, and then click the **Delete Row** on the Action Bar.

5. Click (OK).

Degree Linking Selection Page

The Degree Linking Selection page is a wizard used in linking degree information to a position. The page can be accessed from one of the following pages:

New Position Page	Displays the linking page after you add a new position and complete the other linking pages. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > click (Add New)
Edit Position Page	Displays the linking page when you click the Degrees button while updating a position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Position Control > search for and select a position, and then click (OK)
Batch Position Edit Page	Displays the linking page when you click the Degrees button while adding or updating a batch position record. **Menu Path:** Human Resources > Entry & Processing > Position Control > Batch Position Control > search for and select a position, and then click (OK)

Wizard Pages

The Degree Linking Selection wizard displays the following pages, depending on your selection:

General Degree Linking Page	Enables you to link records from the Degree Level and Degree Subject Type tables to a position.
Degree Linking Page	Enables you to link records from the Degree Type and Degree Subject Type tables to a position.

Procedures

Linking degree information to a position

1. Display the Degree Linking Selection page from one of the pages listed in the introduction.
2. When the page displays, select one of the following radio buttons:

General Linking	Limits the wizard process to the General Degree Linking page.
Degree Linking	Limits the wizard process to the Degree Linking page.
Both (default)	Displays both linking pages during the wizard process.

3. If you selected General Linking or Both in Step 2, enter records in the following fields in the General Degree Linking page. Otherwise, proceed to Step 4.

Minimum Degree Level	Select a code from the Degree Level table, and then click **Next**.
Acceptable Subject Types	Select up to 10 coded from Degree Subject Type table.

Click **Next** if you chose to use the Degree Linking page in Step 2, or click **Finish**.

4. In the Degree Linking page, complete the following fields, and then click **Finish**:

Degree Type	Select a code from the Degree Type table.
Subject	Select up to 10 codes from Degree Subject Type table.

Mass Update Positions Page

Position Control's Mass Update Positions page allows you to link Highly Qualified Teacher records to a group of selected position records.

Menu Path: Human Resources > Periodic Routines > Position Control > Mass Update Positions

Action Bar Items

The following items display on the Mass Update Position page's Action Bar:

Qualifications	Displays the Link Qualified Area to Position page, which links codes from the Qualification Code table to positions. For information on using this page, refer to Link Qualified Area to Position Page (page 85).
Certifications	Displays the Certification Code Setup page, which inks codes from the Certification Type and Certification Area tables to positions. For information on using this page, refer to Certification Code Setup Page (page 86).
Requirements	Displays the Link Requirement to Position page, which inks codes from the links codes from the Requirement Code table to positions. For information on using this page, refer to Link Requirement to Position Page (page 87).

Procedure

Mass updating Highly Qualified Teacher records in positions:

1. Select Human Resources > Periodic Routines > Position Control > Mass Update Positions to display the Mass Update Positions page.
2. Click an item on the Action Bar to link Highly Qualified Teacher records to the positions being updated.
3. Complete the fields in the linking page as needed, and then click (OK) to return to the Mass Update Positions page.
4. Repeat Steps 2-3 for linking additional Highly Qualified Teacher records.
5. In the Mass Update Positions page's Process Criteria section, enter selection criteria in the following fields to identify the positions you want to update:

Job Class	Codes identifying records in the Job Class table. If you select a job class, all positions tied to the class will be updated.
Position	Codes identifying records in the Position table. You can use the pipe symbol in this field to select multiple codes, for example, *1020|2470|5290*.
Location	Codes identifying records in the Location table in Personnel. If you select a location, all positions tied to the location will be updated.

6. Click (OK) to link the Highly Qualified Teacher records to the positions selected.

Qualified Teacher Course Report

Use this option to generate the reports on teachers' qualifications for teaching specific courses. These reports are used in Highly Qualified Teacher reporting.

Menu Path: Human Resources > Reports > Personnel > Qualified Teacher Course Report

Report Types

The Report Type section of the Qualified Teacher Course Report page includes radio buttons for selecting one of the following reports:

Detail Report	Lists teachers, courses, buildings, school years, and related information. The report indicates whether the teachers are qualified or unqualified to teach the courses. For teachers who are qualified, the report shows the qualification met.
Summary Report	Limits the report to teachers who do not meet requirements for teaching the courses indicated.

In addition to the teacher and course data, the reports provide a summary page showing the number of courses and the number and percentage of teachers who are unqualified. You can sort by either teacher or building and teacher. The report's default file name is *qual_course.rpt*.

Assignments and Qualifications

The Assignments page in Human Resources includes two fields related to Highly Qualified Teacher records:

Highly Qualified Area	Stores a code from the Qualification Code table indicating the teacher's qualification for the assignment. **Important** If this code matches the Highly Qualified Area code stored in the corresponding Assignment Code table record, then the teacher will be designated as qualified in the Qualified Teacher Course report.
Highly Qualified Reason	Stores a code from the Qualifications Method table indicating the evaluation method used to determine whether the teacher meets the qualification, for example, a test or certification.

You can access the Assignments page by clicking Personnel Information > Assignments on the Action Bar of an employee's Employee Information page.

Fields

Use the following fields to select the records to include in the report. All of the information referenced by these fields is based on records created in the Human Resources > Entry & Processing > Employee > Qualified Teacher Course Data option. You can use query symbols in all of the fields, except the Summer School checkbox.

School Year
: Year that applies to the course being taught. To select more than one year, use the pipe symbol, for example, *2017|2018*. To select a range of years, use the colon symbol, for example, *2016:2018*.

Building
: Code identifying a building, as defined in Security's Location Codes table. To select an individual building, use the field's drop-down list. To select multiple buildings, use the pipe symbol between codes, for example, *110|230|420*.

Course

Code or short title identifying a course, as defined in the Qualified Teacher Course Data option. To select multiple courses, use the pipe symbol between entries, for example, *1835|4090|7260*.

Course Section

Whole number identifying the section during which a course is taught. To select multiple sections, use the pipe symbol between numbers, for example, *101|175|210*. To specify a series of course sections, use the colon symbol, for example, *101:150*.

Summer School

Checkbox indicating whether a course is taught in summer school.

- Leave the field at its default to include both regular year and summer school courses.
- Clear the checkbox to limit the report to regular year courses.
- Select the checkbox to limit the report to summer school courses.

State Course Equivalent

Code or title used by the state to identify the course that is the equivalent of the one taught in your district. To select multiple codes, use the pipe symbol between each, for example, *5100|5340|8210*.

Staff ID

Employee ID number identifying a teacher. To select a teacher, use the field's (Lookup) button. The pipe symbol can be used to enter multiple ID's, for example, *12345|13386|14598*. If all of your ID numbers are the same length, you can also use the colon symbol to specify a range of numbers, for example, *12000:15000*.

Sample Qualified Course Information - Detail

```
SUNGARD                                                                                                      PAGE NUMBER:    1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                               UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 210 - LINCOLN MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                 QUALIFICATION
 2012  210        1895       303        N    ELEM ART   16533     RITTOLO, SUSAN B                     ART CERTIFICATION I
                  ART APPRECIATION                      SESSION: 1         PRIMARY: Y
 2012  210        0510       104        N    BASIC MATH 22049     BLOOMFIELD, MICHAEL A                MATH CERTIFICATION I
                  MATH FUNDAMENTALS                     SESSION: 4         PRIMARY: Y
 2012  210        1030       411        N    EARTH SCI  22760     HESTER, CAROLYN G                    ** NOT QUALIFIED **
                  EARTH SCIENCE                         SESSION: 2         PRIMARY: Y
.........................................................................................................................................
SUNGARD                                                                                                      PAGE NUMBER:    2
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                               UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 220 - TAFT MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                 QUALIFICATION
 2012  220        1895       303        N    ELEM ART   14125     HOLSTRA, MARK N                      ART CERTIFICATION I
                  ART APPRECIATION                      SESSION: 2         PRIMARY: Y
 2012  220        0510       104        N    BASIC MATH 19220     LOUNDES, SARA C                      ** NOT QUALIFIED **
                  MATH FUNDAMENTALS                     SESSION: 6         PRIMARY: Y
 2012  220        1030       411        N    EARTH SCI  21478     HESTER, CAROLYN G                    SCIENCE CERTIFICATION I
                  EARTH SCIENCE                         SESSION: 2         PRIMARY: Y
.........................................................................................................................................
SUNGARD                                                                                                      PAGE NUMBER:    3
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                               UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 220 - TAFT MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                 QUALIFICATION


                   NUMBER OF COURSES:        6          NUMBER UNQUALIFIED:         2          PERCENT UNQUALIFIED:     33.33
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Sample Qualified Course Information - Summary

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SUNGARD                                                                                                                  PAGE NUMBER:    1
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                                           UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 210 - LINCOLN MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                    QUALIFICATION

 2012  210        1030       411        N    EARTH SCI  22760     HESTER, CAROLYN G                       ** NOT QUALIFIED **
                  EARTH SCIENCE                         SESSION: 2         PRIMARY: Y
.....................................................................................................................................
SUNGARD                                                                                                                  PAGE NUMBER:    2
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                                           UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 220 - TAFT MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                    QUALIFICATION

 2012  220        0510       104        N    BASIC MATH 19220     LOUNDES, SARA C                         ** NOT QUALIFIED **
                  MATH FUNDAMENTALS                     SESSION: 6         PRIMARY: Y
.....................................................................................................................................
SUNGARD                                                                                                                  PAGE NUMBER:    3
DATE: MM/DD/YYYY                                      YOUR ORGANIZATION'S NAME                                           UPDSTUCRSE
TIME: HH:MM:SS                                      QUALIFIED COURSE INFORMATION
SELECTION CRITERIA:  stu_course.building in (210,220)

BUILDING: 220 - TAFT MIDDLE SCHOOL

SCHOOL                                SUMMER STATE      EMPLOYEE
 YEAR  BUILDING   COURSE     SECTION  SCHOOL EQUIVALENT NUMBER    NAME                                    QUALIFICATION

                  NUMBER OF COURSES:         6           NUMBER UNQUALIFIED:         2         PERCENT UNQUALIFIED:     33.33
```