




AASBO – February 2019

Position Control as a Management Tool

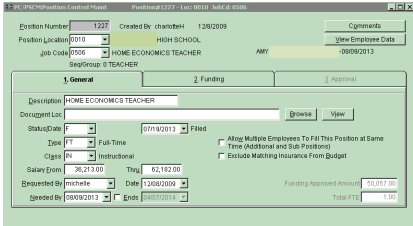

Objectives of Position Control

- Ensure that all Employees are Assigned to Authorized and Funded Positions
- Streamline Workflow Between HR and PR
- Eliminate Redundant Data Input
- Support Checks & Balances Between Departments
- Historical Views of Positions and Employee Assignments
- Track Vacant and Filled Positions
- Reporting of Job & FTE Distribution
- Optional Budget Checking Based on FTE Allocations
- Optional Board Agenda Reporting
- Optional Approval Process for New Positions



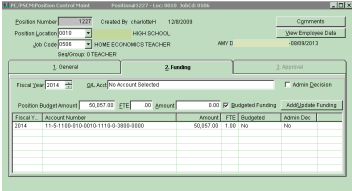
Position Control Basics – Master Position

- Master Positions are Defined by:
 - Location (Where)
 - Job Code (What)
 - Salary Range – determined by lowest and highest salary for the Salary Schedules checked in Job Code Maintenance

Position Control Basics – Master Position

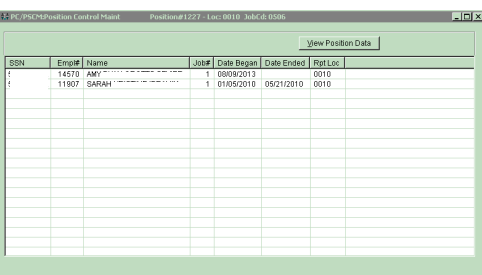
- Funding of Position
 - GL Account and FTE (How Many)
 - Budgeted Salary (How Much) – used for Vacancies during budgeting process when Salary Work table field “HR Salary Work Name” field is checked.



The screenshot shows a form for 'Position Control Master Position'. It includes fields for Position Number (1227), Created By (HARSH), and Position Location (HS-SCHOOL). The Job Code is 2521, HOME ECONOMICS TEACHER, AMY D, 08/09/2013. The Position Budget/Revenue is 50,857.00, FTE is .00, and Budgeted Funding is 50,857.00. The Salary Work table shows a single entry for 2014 with a salary of 50,857.00 and a flag of 'No'.

Position Control Basics – Master Position

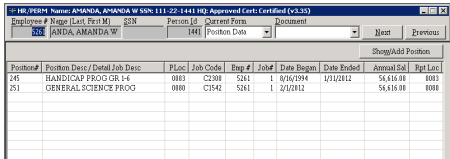
- History Displayed for Employees Assigned to the Position



The screenshot shows a table titled 'View Position Data' with columns for SSN, EmpID, Name, Job#, Date Began, Date Ended, and Post Loc. Two entries are visible: AMY (SSN 14579, Job# 1, Date Began 08/09/2013, Date Ended 09/10, Post Loc 0010) and SARAH (SSN 11807, Job# 1, Date Began 01/05/2010, Date Ended 05/21/2010, Post Loc 0010).

Position Control Basics – Employee Assignment

- Positions are Filled by:
 - Employees (Who)
 - Duration (When)
- History Displayed for Positions Held by the Employee



The screenshot shows a table titled 'Show All Positions' for employee Amanda W. It has columns for Position#, Position Desc / Detail Job Desc, FLoc, Job Code, Sup #, Job#, Date Began, Date Product, Annual Sal, and Bgt Loc. Two entries are visible: HANDICAP PROG OR L-4 (Position# 245, Annual Sal 56,618.00) and GENERAL SCIENCE PROG (Position# 251, Annual Sal 56,618.00).

Position Control Basics

Active Distribution Report – Job or GL Location

RUN DATE: 04/07/2014 HCAI HRMAN RESOURCES SYSTEM Page: 110 of 120
 RUN TIME: 04:35AM ACTIVE PERSONNEL DISTRIBUTION BY JOB CODE REPORT HRA40210

REPORT PARAMETERS SELECTED: JOB CODE LOCATION - ALL, CERTIFICATION STATUS - ALL, PERSONNEL STATUS - ALL

JOB CODE AND DESCRIPTION	LOCATION	EMP #	JOB NAME	RATE	ANNUAL SAL	EST SAL	DATE	FY	EMPL TYPE	HRSP
0000	BUS DRIVER - FULLTIME	15565	1 WELD	1	10,259.24	10,259.24	10/29/2013	M	FD	4.00
0021		11361	1 WELD	1	14,389.00	14,389.00	02/27/1997	M	FD	4.00
0012		13156	1 WHEE	1	13,851.00	13,851.00	09/29/2002	M	FD	4.00
0030		15421	1 WEL-SE	1	13,130.00	13,130.00	11/19/2010	M	FD	4.00
0021		11590	1 WEL-UP	1	14,389.00	14,389.00	03/07/1999	M	FD	4.00
0002		11917	1 WEL-UP	1	14,389.00	14,389.00	04/07/1997	M	FD	4.00
0001		14548	1 WEL-UP	2	13,130.00	13,130.00	1/05/2001	M	FD	4.00
0011		10110	1 WEL-SD	1	12,150.00	12,150.00	05/16/2012	M	FD	4.00
0001		10385	1 WEL-NA	1	12,150.00	12,150.00	05/14/2013	M	FD	4.00
0002		10942	1 WEL-NA	1	12,150.00	12,150.00	05/14/2013	M	FD	4.00
***** TOTAL PERSONNEL FOR JOB CODE WELD *****										
***** 110.00 *****										



Position Control Basics

Active Distribution Report – Job or GL Location

RUN DATE: 04/07/2014 HCAI HRMAN RESOURCES SYSTEM Page: 5 of 14
 RUN TIME: 04:35AM ACTIVE PERSONNEL DISTRIBUTION BY LOCATION REPORT HRA40210

REPORT PARAMETERS SELECTED: JOB CODE LOCATION - ALL, CERTIFICATION STATUS - ALL, PERSONNEL STATUS - ALL

JOB CODE AND DESCRIPTION	LOCATION	EMP #	JOB NAME	RATE	ANNUAL SAL	EST SAL	DATE	FY	EMPL TYPE	HRSP
6020 SCHOOL SECRETARY	10174 LOAN, I	1	23,629.00	23,629.00	1.00	1995-09-31	M	SO	7.00	
***** TOTAL PERSONNEL FOR JOB CODE 6020 *****										
***** 7.00 *****										
6021 SCHOOL SECRETARY/BOOKKEEPER	14439 FOLDR	1	24,897.00	24,897.00	1.00	01/19/01-01	M	ST	7.00	
***** TOTAL PERSONNEL FOR JOB CODE 6021 *****										
***** 7.00 *****										
6616 HEALTH NURSE	15183 ALEXANDER	2	24,716.00	24,716.00	1.00	2005-09-03	M	NC	7.00	
***** TOTAL PERSONNEL FOR JOB CODE 6616 *****										
***** 7.00 *****										
***** TOTAL PERSONNEL FOR JOB CODE LOCATION 6020 *****										
***** 14.00 *****										



Position Control Basics

Faculty By School Report – Position Location/GL Comp

SEHR: FBS04: Faculty by School Report (v3.014)

Fiscal Year: 2016

Select Up to 5 Experience Codes

Code	Description
<input checked="" type="checkbox"/>	OTH Support/Classified Experie
<input checked="" type="checkbox"/>	PRV Private School Certified Ex
<input checked="" type="checkbox"/>	PLB Non-Alabama Public Scho
<input checked="" type="checkbox"/>	ST Alabama Public School Ce
<input checked="" type="checkbox"/>	SYS Certified Experience

Personnel Certified Codes

Type	Description
<input type="checkbox"/>	C Certified
<input type="checkbox"/>	N Non-Certified
<input type="checkbox"/>	S Substitute

Report By: Position/Job Location

Report Destination: To Report Viewer

Enter Selection Criteria, Click Enter(F1) To Generate Report




Position Control Basics

Faculty By School Report – Position Location/GL Comp

RUN DATE: 4/2/14 MCA HUMAN RESOURCES SYSTEM Page 1 of 17
 RUN TIME: 5:28:17AM PERSONNEL BY SCHOOL REPORT HRP02R

CERTIFICATED REPORTED	Certifcd	NAME	SSN	EDUC	DEGREE	JOB	CODE	GLT/E	FTE SAL/REV	GLS	NSALARY
ANDERSON	ANDERSON, DORIS	ANDERSON, DORIS	42332719	DEGREE	2	1	0511	1.00	53,028.00	1.00	53,028.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-05						
BALLEW	BALLEW, BRYAN	BALLEW, BRYAN	40738308	DEGREE	2	1	0504	1.00	46,867.00	1.00	46,867.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-05						
BRAIN, I	BRAIN, IAN	BRAIN, IAN	43330364	DEGREE	1	1	0502	1.00	41,020.00	1.00	41,020.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-04						
BROWN	BROWN, KIMBERLY	BROWN, KIMBERLY	42426444	DEGREE	2	1	0503	1.00	50,984.00	1.00	50,984.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-14						
CARTER	CARTER, JAMES	CARTER, JAMES	42448400	DEGREE	1	1	0504	1.00	45,548.00	1.00	45,548.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-04						
CHANDLER	CHANDLER, JAMES	CHANDLER, JAMES	41710387	DEGREE	1	1	0501	1.00	45,268.00	1.00	45,268.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-03						




Position Control Basics

Faculty By School Report – Position Location/GL Comp

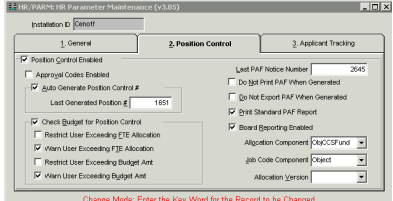
RUN DATE: 4/2/14 MCA HUMAN RESOURCES SYSTEM Page 1 of 30
 RUN TIME: 5:30:27AM PERSONNEL BY SCHOOL REPORT HRP02R

CERTIFICATED REPORTED	Certifcd	NAME	SSN	EDUC	DEGREE	JOB	CODE	GLT/E	FTE SAL/REV	GLS	NSALARY
ANDERSON	ANDERSON, DORIS	ANDERSON, DORIS	42332719	DEGREE	2	1	0511	1.00	53,028.00	1.00	53,028.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-05						
BALLEW	BALLEW, BRYAN	BALLEW, BRYAN	40738308	DEGREE	2	1	0504	1.00	46,867.00	1.00	46,867.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-05						
BRAIN, I	BRAIN, IAN	BRAIN, IAN	43330364	DEGREE	1	1	0502	1.00	41,020.00	1.00	41,020.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-04						
BROWN	BROWN, KIMBERLY	BROWN, KIMBERLY	42426444	DEGREE	2	1	0503	1.00	50,984.00	1.00	50,984.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-14						
CARTER	CARTER, JAMES	CARTER, JAMES	42448400	DEGREE	1	1	0504	1.00	45,548.00	1.00	45,548.00
Experience:	07:00	PRVND	PLN04	ST10	ST15-04						




Optional PC Component – Budget Checking

- HR Parameter Maintenance – Position Control Options
 - Check Budget for Position Control
 - Restrict/Warn user Exceeding FTE/Budget
 - Allocation Component
 - Allocation Version

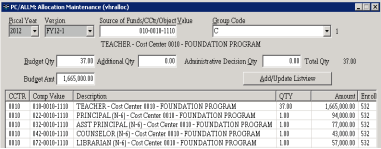


Change Mode: Enter the Key Word for the Record to be Changed



Optional PC Component – Budget Checking

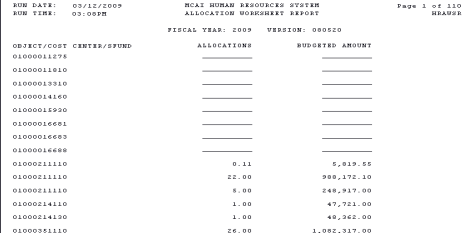
- Allocations for Budget Checking:
 - Cost Center (Where)
 - Object Code (What)
 - Funding Source (Foundation, Federal, Local, etc.)
 - Total FTE (How Many)
 - Total Salary Budget (How Much)
 - CCTR Enrollment



CCTR	Comp Value	Description	FTE	Amount	Unit
1110	1110-1110-1110	TEACHER - Cost Center 1110 - FOUNDATION PROGRAM	37.00	1,665,900.00	512
1110	1120-1110-1110	PRINCIPAL (24) - Cost Center 1110 - FOUNDATION PROGRAM	1.00	90,000.00	512
1110	1130-1110-1110	ASST PRINCIPAL (24) - Cost Center 1110 - FOUNDATION PROGRAM	1.00	75,000.00	512
1110	1140-1110-1110	COUNSELOR (24) - Cost Center 1110 - FOUNDATION PROGRAM	1.00	45,000.00	512
1110	1150-1110-1110	LIBRARIAN (24) - Cost Center 1110 - FOUNDATION PROGRAM	1.00	50,000.00	512

Optional PC Component – Budget Checking

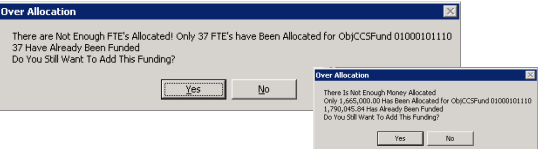
- Allocation Worksheet Report – List of FTEs and Budget Amounts from the Allocation Master



OBJECT/COST CENTER/SPUND	ALLOCATIONS	BUDGETED AMOUNT
01000011279	_____	_____
01000011920	_____	_____
01000013310	_____	_____
01000014160	_____	_____
01000015920	_____	_____
01000016601	_____	_____
01000016602	_____	_____
01000016608	_____	_____
01000211110	0.11	5,919.55
01000211110	22.00	990,172.10
01000211110	6.00	249,917.00
01000214110	1.00	47,721.00
01000214130	1.00	49,262.00
01000251110	26.00	1,082,317.00

Optional PC Component – Budget Checking

- Budget Checking Options
 - Restrict User Exceeding FTE Allocation
 - Warn User Exceeding FTE Allocation
 - Restrict User Exceeding Budget Amount
 - Warn User Exceeding Budget Amount



Over Allocation

There are Not Enough FTE's Allocated! Only 37 FTE's have been Allocated for ObjCCSFund 01000101110
37 Have Already Been Funded
Do You Still Want To Add This Funding?

Over Allocation

There is Not Enough Money Allocated.
Only 1,665,000.00 Has Been Allocated for ObjCCSFund 01000101110
1,792,950.00 has Already Been Funded
Do You Still Want To Add This Funding?

Optional PC Component – Budget Checking

- Budget Checking Options
 - Over Allocation Warning is displayed because 85.06 FTE's have been allocated to 010-0230-1110 and the Position Control Master already contains 90.06 FTE's funded by 010-0230-1110. Note: If a Vacant Position is being Deleted or Frozen, delete the funding record(s) to reduce the total existing FTE's.



Optional PC Component – Reporting

- Assigned Pos by ObjCCSFund – Allocation Query

Total FTE's for assigned Position Data records funded by 010-0230-1110 = 84.06; Total Amount = \$3,872,608.16



Optional PC Component – Reporting

- Assigned Pos by ObjCCSFund – Allocation Query
 - Detail of an assigned Position Data record funded by 010-0230-1110



Optional PC Component – Reporting

- **PC Analysis Report** – The report shows vacancy position detail.

RUN DATE: 05/01/2017
 RUN TIME: 06:17PM
 MCA HUMAN RESOURCES SYSTEM
 POSITION CONTROL ANALYSIS REPORT
 Page 1 of 30
 HRFSSCV

POSITION #	Est	Func	Org	Chg	Ser	Y	Emp	Sec	AMOUNT	SS	MEDI	SUJ	coste	OTHER	MANDATED
9200	11-5-4130-161-0050-1310-0-2000-7011								14,696.00						0.00
TOTAL FOR POSITION # 9200															
9209	11-5-1100-010-0730-1110-0-1500-0000								55,391.00						0.00
TOTAL FOR POSITION # 9209															
9284	11-5-1100-197-0136-0001-0-4503-0000								7,345.00						0.00
TOTAL FOR POSITION # 9284															
9314	11-5-4130-161-0095-1310-0-8410-7011								7,475.00						0.00
TOTAL FOR POSITION # 9314															
9342	11-5-2310-143-0550-1110-0-8230-0000								21,205.00						0.00
TOTAL FOR POSITION # 9342															
9344	11-5-1100-010-0530-1110-0-1500-0000								53,963.00						0.00
TOTAL FOR POSITION # 9344															
9345	11-5-1100-191-0530-0001-0-1621-0000								4,763.00						0.00
TOTAL FOR POSITION # 9345															



Optional PC Component – Reporting

- **Position Control Query** – Lists Budget FTE and Amount from Position Control Master and Actual FTE and Amount from Position Data Records

PC PCQP Position Control Query (V.1.0.0)

Pos#	P	Job	Status	Type	Bud Y	Bud	Act Y	Act	Act	Act Y	Pos Description	Pos	Name
9206	02	101	Filld	Esch.	2009	1.00	50,365.00	1.00	50,365.00	2009	PHYSICAL ED.	8962	SMITH, E
9207	02	10F	Filld	Esch.	2009	1.00	3,491.00	1.00	3,491.00	2009	TRACK BOYS	8962	SMITH, E
9208	02	10B	Deltd	Esch.	2009	1.00	3,491.00	0.00	0.00		ASST FOOTBA.		
9209	02	100	Filld	Esch.	2009	1.00	54,470.00	1.00	54,470.00	2009	FACE	8911	SMITH, T
9313	02	100	Filld	Esch.	2009	1.00	41,564.00	1.00	41,564.00	2009	SPECIAL ED T.	8924	BOUCHE
9347	02	100	Filld	Esch.	2009	1.00	42,818.00	1.00	42,818.00	2009	SOCIAL STUD.	8930	EDGEE, TR
9348	02	100	Filld	Esch.	2009	1.00	51,814.00	1.00	51,814.00	2009	BIOLOGY	8930	FINNEOV
9426	02	850	Filld	Esch.	2009	1.00	15,880.00	1.00	15,880.00	2009	CUSTODIAN	1001	BRANE, S
9469	02	650	Filld	Esch.	2009	1.00	19,222.00	1.00	19,222.00	2009	CHESTDIAN	8924	BAKTER
9603	02	101	Filld	Esch.	2009	1.00	49,238.00	1.00	49,238.00	2009	BUSINESS ED.	1002	SHANRL
9605	02	102	Filld	Esch.	2009	1.00	42,497.00	1.00	42,497.00	2009	DRIVER EDUC.	8962	JORDAN
9684	02	10H	Filld	Esch.	2009	1.00	3,491.00	1.00	3,491.00	2009	BASEBALL B.	8962	JORDAN
9685	02	10K	Deltd	Esch.	2009	1.00	3,491.00	0.00	0.00		ASST FOOTBA.		
9908	02	100	Filld	Esch.	2009	1.00	50,365.00	1.00	50,365.00	2009	MATHEMATICS	8029	GOLDDM
9923	02	100	Filld	Esch.	2009	1.00	55,932.00	1.00	55,932.00	2009	SPECIAL ED T.	8029	PRICE, K
9924	02	100	Filld	Esch.	2009	1.00	1,200.00	1.00	1,200.00	2009	DEPTMENT H.	8962	PRICE, K
9943	02	100	Deltd	Esch.	2009	1.00	41,895.00	0.00	0.00		CHEMISTRY		
10118	02	47N	Filld	Esch.	2009	1.00	14,004.00	1.00	14,004.00	2009	CHP ASSISTA.	8962	HOFHND
10285	02	100	Filld	Esch.	2009	1.00	45,546.00	1.00	45,546.00	2009	ENGLISH	8911	CATES, S
10286	02	100	Filld	Esch.	2009	1.00	1,500.00	1.00	1,500.00	2009	DEPTMENT H.	8962	GOLDDM
10286	02	100	Filld	Esch.	2009	1.00	49,362.00	1.00	49,362.00	2009	HISTORY	8911	STALLW
10333	02	100	Filld	Esch.	2009	1.00	48,362.00	1.00	48,362.00	2009	FRENCH	8911	EDMON
10351	02	100	Filld	Esch.	2009	1.00	48,362.00	1.00	48,362.00	2009	BIOLOGY	8911	BEARDS



Optional PC Component – Board Reporting

- **School Board Members** are frequently asked to approve personnel change requests submitted by Central Office and the schools in their jurisdiction. These requests include any number of personnel actions including employee hires, terminations, and salary changes. Generally, the Board Agenda Report is produced 'manually' by the Human Resources Department, which can be a time-consuming task.
- **The Board Agenda Reporting** module may be used to generate the Board Meeting Agenda using the existing Personnel Actions in the Position Control System, therefore freeing up valuable resources. In today's environment, where School Systems are being asked to do 'more with less', automation of clerical tasks is essential.



Optional PC Component – Board Reporting

- Report Pending Personnel Actions by:
 - Board Action Type (Assignment, Retirement, Voluntary Transfer, etc.)
 - Board Meeting Date
 - Comments
 - Addendum (Optional)

Board Report Info (Optional)

Board Date: 1/16/2011
 Board Report Code: TRV
 Prior Location: BAKES MIDDLE SCHOOL
 Prior Job Code: 1004

Buttons: Comments, Accept, Cancel

Must Select a Valid Job Code

Optional PC Component – Board Reporting

- Flexible Board Agenda Reporting and Customized Board Agenda Report using Crystal

City Board of Education
 Certified Personnel Actions
 Board Date: 05-24-2011

NUMBER	EMPLOYEE NAME	SCHOOL	SALARY	EFFECTIVE DATE RANGE	REMARKS
C-597			92,500.00	05/24/2011	ASSIGNMENT PRINCIPAL
C-598			92,500.00	3/1/2011	PRINCIPAL
C-597				6/1/2011	RESIGNATION PRINCIPAL
C-598				6/1/2011	RESIGNATION PRINCIPAL
C-595				6/1/2011	TERMINATION ONLY FROM COACHING POSITION HEAD VOLLEYBALL COACH
C-596				6/1/2011	TERMINATION ONLY FROM COACHING POSITION CHEERLEADER COACH
C-597				6/1/2011	TERMINATION ONLY FROM COACHING POSITION ASSISTANT FOOTBALL COACH

Optional PC Component – Approval Process

- Approval Processing for New Positions:
 - Approver (Person or Department)
 - Date Reviewed
 - Approval (Yes or No)
- Position Remains Unapproved (Cannot Fill) Until Final Approval
- Strongly Suggest Budget Department be Included as Approver

Approval

Approval Code: DHR Department Head
 Date Reviewed: 6/17/2012
 User: motous ajax user

Code	Description	Date Reviewed	Approved	User Approved
DHR	Director of Human Resources	6/17/2012	Yes	motous ajax user
SUP	Superintendent		No	

**Advantages of Position from CSFO
Point of View**

- Unit Meetings/Principal Budget Meetings – Budget meetings with principals are facilitated by the use of Position. We freeze positions or create new positions based on results of the principal budget meetings. This eliminates principals hiring positions that were not approved in the budget meetings

**Advantages of Position from CSFO
Point of View**

- Changes in overall positions are easily tracked with using Position Control. For example, if an elementary school wants to add a new third grade position, add a new fourth grade position while removing 2 second grade positions, this is easily done through Position Control. I am able to make sure that the total number of positions are within budgeted total positions allocated to that school.

**Advantages of Position from CSFO
Point of View**

- Can easily track the types of vacancies within the school system. For instance, we can know how many special education teachers, first grade teachers, math teachers, etc. we have at any given time.
- I am asked by board members/superintendent to let them know how many unfilled positions we currently have. Position Control has many reports that makes gathering this information easy to obtain.

**Advantages of Position from CSFO
Point of View**

- Using Position Control to generate personnel agenda for board meetings ensures that the legal name appears on the board agenda. We had issues in the past with nicknames, middle names, etc. listed on the board agenda instead of the employees legal name.

**Advantages of Position from CSFO
Point of View**

- Information is available immediately as to the current staff for the following school year. As soon as the information is added for the board agenda, the employee information is current in Position Control. Before Position Control, we did not have a current staff listing until payroll entered all new employees which normally did not occur until around the middle to end of September.
