



FileBound

**Position Control Request (PCR) – Process Handbook
February 2023**

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Table of Contents

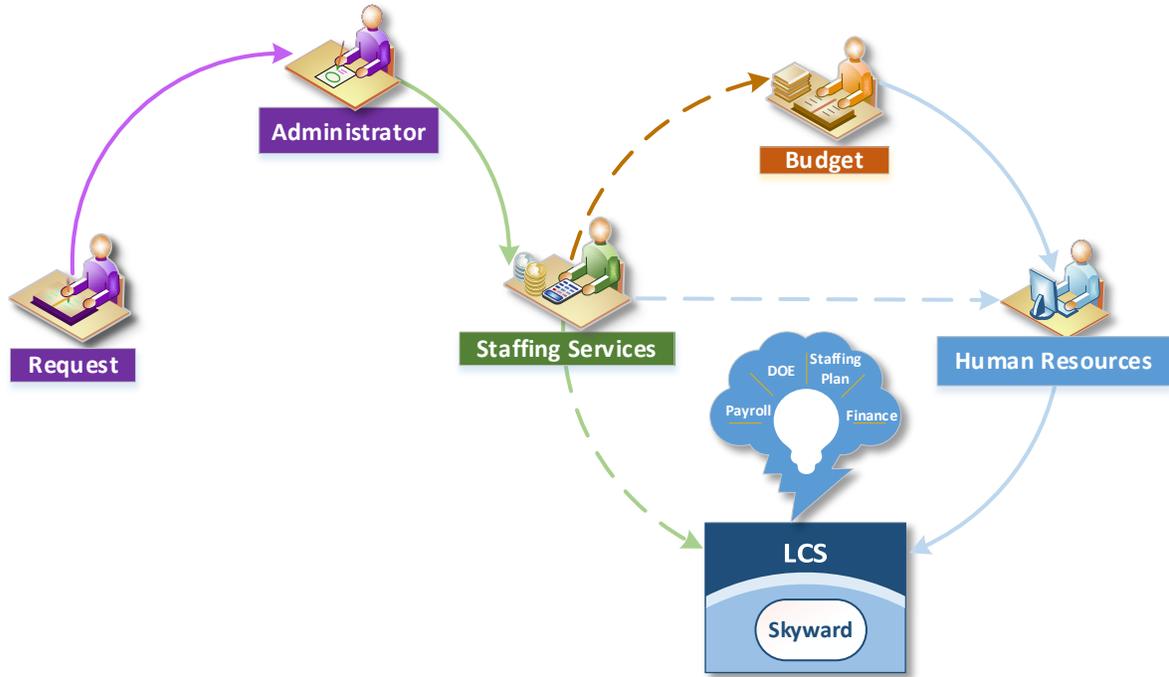
Purpose	i
Basic Concepts	ii
Users	ii
Groups.....	ii
Projects	ii
Forms	ii
Project Definition	1-1
Search.....	2-1
Search Results	2-2
File Details.....	2-3
Document View.....	2-4
Your Assignment Queue	3-1
Assignment Types	3-1
The Web Viewer Interface	4-1
Document Information	4-2
Document Signatures.....	4-3
Assignments	4-3
Document Journal.....	4-5
Settings.....	4-6
Position Control Request (formerly Position Control Form)	5-1
New Processing Features	5-1
Workflow.....	5-2
PCR – Alter Employee Funding (Submission).....	6-1
Submitting a PCR – Alter Employee Funding	6-2
Entering New Account Distribution (Funding Strip) Info.....	6-4
Process Step – Complete Submission	6-4

Table of Contents

PCR – Add Assignment (Submission)	7-1
Submitting a PCR – Add Assignment.....	7-2
Entering New Account Distribution (Funding Strip) Info.....	7-3
How to Request an Assignment for a New Fiscal Year	7-4
Process Step – Complete Submission	7-5
Approvals	8-1
Process Step – Supervisor Review (District / Administrative)	8-2
Process Step – Staffing-Services Review.....	8-3
PCR Workflow Restart.....	8-5
Process Step – Budget Review	8-6
Process Step – HR Review	8-7
Process Complete - Notification	9-1

Purpose:

This document provides you with instructions on processing position control request forms via FileBound.



Basic Concepts

The following are some of the essential terms and concepts that you need to understand before you start using FileBound PCR forms.

Users

For Position Control Request (PCR) processing, any user that currently processes Position Control forms via Liquid Office will have access to FileBound.

Groups

All PCR users will be assigned to a specific group based on their role within the approval process. A single user can have multiple group associations. Group roles will determine access to documents and functionality within project.

- **Facility** - can only view and process requests based on the selected location.
- **Supervisor Approver** - can only view and process requests based on the submitted site.
- **District Approver** - can view and process all requests regardless of location.
 - ✓ Staffing Services
 - ✓ Budget
 - ✓ Human Resources

Projects

The PCR workflow approval processing utilizes three overall projects for managing assignments.

1. **Position Control Request:** the base project where submissions are entered and processed.
2. **PCR Approver Matrix:** contains a listing of supervisor approvers by location/facility.
3. **PCR Budget Matrix:** includes a listing of budget approvers by department/office. **Example:** Finance, Grants, etc.

Forms

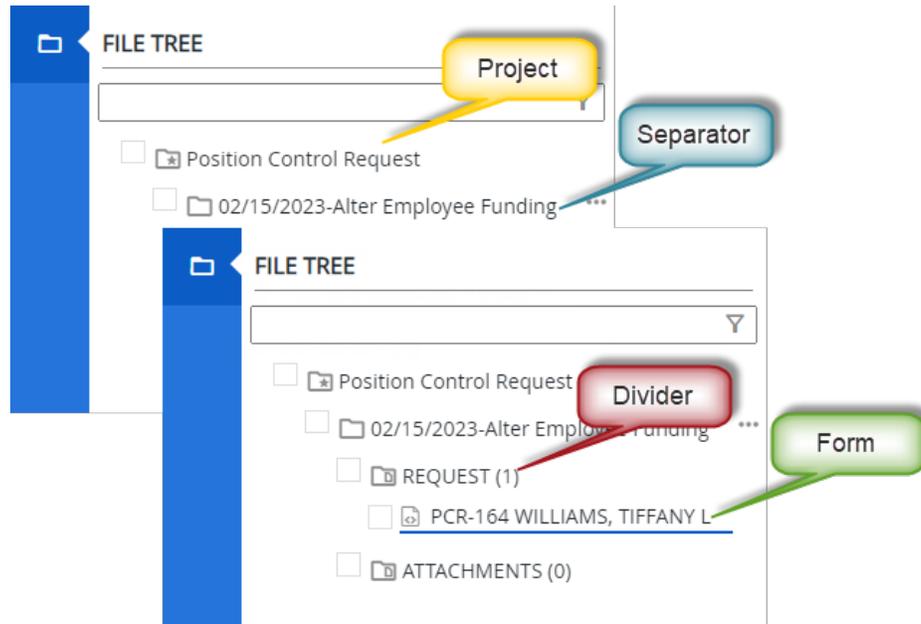
Within FileBound, there are two types of form modes *submission* and *view/edit*. A submission form is an initial step to processing a request.

Once you have submitted a request, it triggers the beginning of the workflow routing process. You will complete your submission and route it for approval using the view/edit.

All approvers from this point on will utilize the view/edit format to approve or reject your request.

Project Definition

The project provides access to and management of position control request documents. Following the FileBound structure hierarchy, the project contains a separator based on the desired action. Under the action separator, dividers distribute the document (form) and the uploaded attachments.



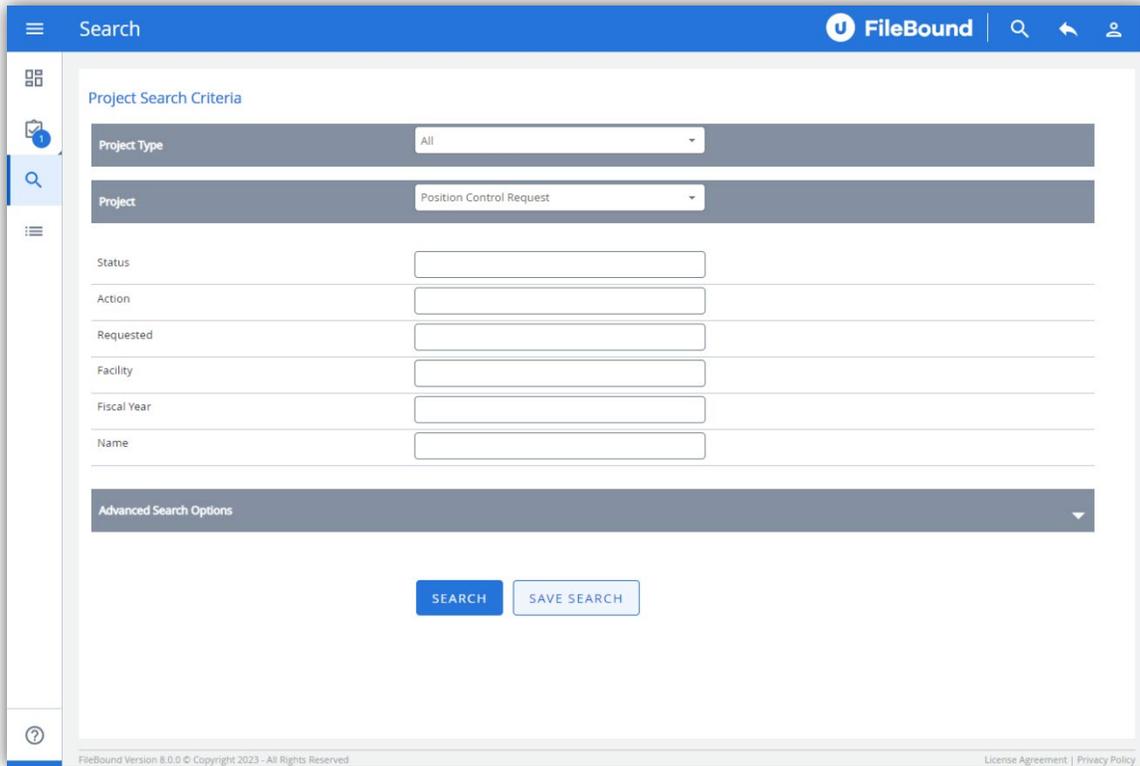
Skyward ERP is the central platform for providing employee data to the PCR project. Employee profile and position control data are the primary sources for request selection. Skyward data is *not updatable* within the FileBound project.

Searchable data fields within the project consist of the following:

- ✓ Requested (date)
- ✓ Requested Action
- ✓ Facility
- ✓ Status
- ✓ Name (Last, First, Middle)
- ✓ Employee Id
- ✓ Nalphakey

Built-in journaling and auditing keep track of actions taken to all submitted and processed PCRs in the repository.

Search



One of the primary tasks you will perform within the PCR project is finding and viewing and approving request-related information. Search is a simple and primary function that you will perform in FileBound.

Search selection fields allow you to target specific types of request information. For example, when searching for an employee, you may use, status, type of requested action, requested date, or facility (building location). A field entry is *not required* to initiate a search request.

Search Results

Fiscal Year	Facility	Action	Requested	Status	Name	Employee Id	Nalphekey
2022	1131	Alter Employee Fund...	02/22/2023	Staffing-Services Review	ROOKS, AMY	564799633	ROOKSAM000
2022	9447	Alter Employee Fund...	02/22/2023	Supervisor Review	FULATER, CHRISTINA L	000042464	FULATCHR001
2022	9864	Add Assignment	02/22/2023	Complete			
2022	9137	Add Assignment	02/22/2023	Complete			
2022	9461	Alter Employee Fund...	02/22/2023	Complete	DEVANE, BARBARA L...	895451239	DEVANBAR000
2022	1201	Alter Employee Fund...	02/22/2023	Complete	MCCALL, JOANNE M	551875992	MCCALJOA000
2022	0381	Alter Employee Fund...	02/22/2023	Complete	ROSS, ANNA LINEHAN	000045738	ROSS ANN000
2022	0561	Add Assignment	02/22/2023	Complete			
2022	9461	Alter Employee Fund...	02/22/2023	Complete	BOWEN WATTS, AURA	599684432	BOWENAU000
2022	9441	Alter Employee Fund...	02/22/2023	HR Review	BRENT, SHARIA	554252753	BRENTSHA000
2022	0501	Alter Employee Fund...	02/22/2023	Complete	SWAN, LACACIA F	000052771	SWAN LAC000
2022	9441	Alter Employee Fund...	02/22/2023	Complete	CLAY, DESHIBA L	000051920	CLAY DES000
2022	9391	Alter Employee Fund...	02/22/2023	HR Review	BRAMBLETT, KARYN L	986389735	BRAMBKAR000
2022	9391	Alter Employee Fund...	02/22/2023	Budget Review	SMITH, MARIAN LYNNE	469299764	SMITHMAR000
2022	9441	Alter Employee Fund...	02/22/2023	Complete	WHITE, DEREK D	423938739	WHITEDER000
2022	1202	Add Assignment	02/22/2023	Complete			
2023	0071	Add Assignment	02/22/2023	Pending (Staffing-Services)			
2022	0031	Alter Employee Fund...	02/23/2023	Complete	JOHNS, LOGAN THO...	591114583	JOHNSLOG000
2022	0481	Alter Employee Fund...	02/23/2023	Complete	BYRD, JACARY	225742127	BYRD JAC001
2022	0461	Alter Employee Fund...	02/23/2023	Complete	BYRD, JACARY	225742127	BYRD JAC001

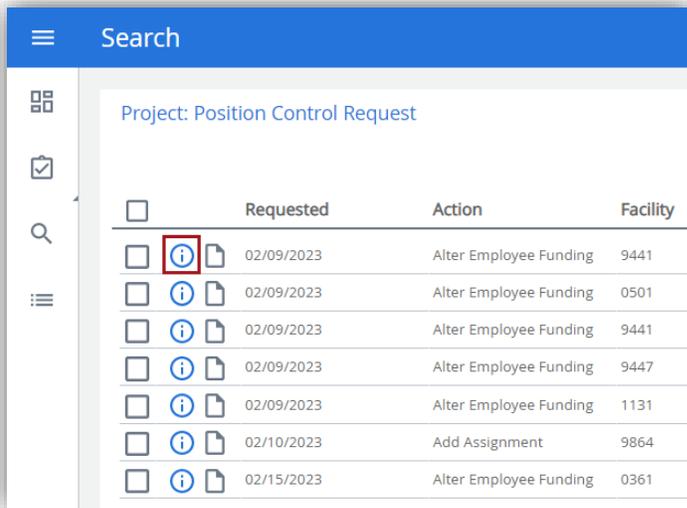
The search results page displays a list of files matching the search criteria. In addition, the interface contains components that provide access to file and document-related functions.

i The records displayed, may be limited based on your security access.

A Results Toolbar

- Refresh** You can update the displayed results of the search page.
- Edit Search** You can refine the search results.
- Options**
 - Print** You can print all the records on the search results page or type the page numbers in the boxes provided.
 - Export** You can export files in excel or CSV format.
 - Add All to Clipboard** You can add all files on the search results to your Clipboard.

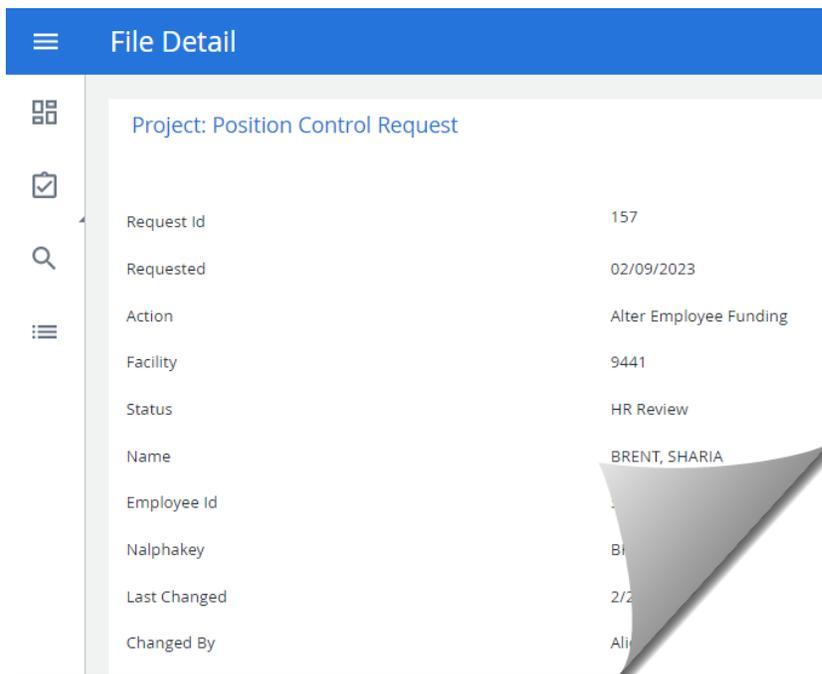
File Details



	Requested	Action	Facility
<input type="checkbox"/> 	02/09/2023	Alter Employee Funding	9441
<input type="checkbox"/> 	02/09/2023	Alter Employee Funding	0501
<input type="checkbox"/> 	02/09/2023	Alter Employee Funding	9441
<input type="checkbox"/> 	02/09/2023	Alter Employee Funding	9447
<input type="checkbox"/> 	02/09/2023	Alter Employee Funding	1131
<input type="checkbox"/> 	02/10/2023	Add Assignment	9864
<input type="checkbox"/> 	02/15/2023	Alter Employee Funding	0361

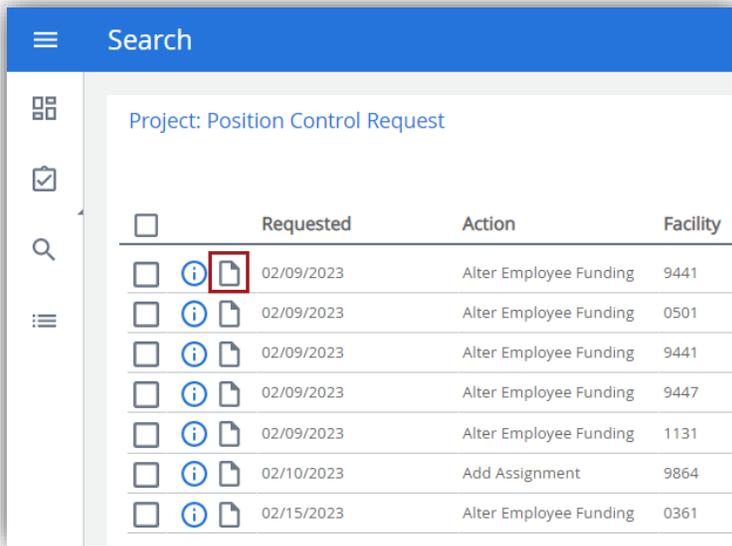
From the search results page, you can view request file data. Skyward imported employee file data is read-only; you may not update this information. To access the file details page:

1. From the search results, single-click the  icon next to the desired employee.
2. The requested details will be displayed on the **File Detail** page.



Request Id	157
Requested	02/09/2023
Action	Alter Employee Funding
Facility	9441
Status	HR Review
Name	BRENT, SHARIA
Employee Id	
Nalphakey	BR
Last Changed	2/2
Changed By	Ali

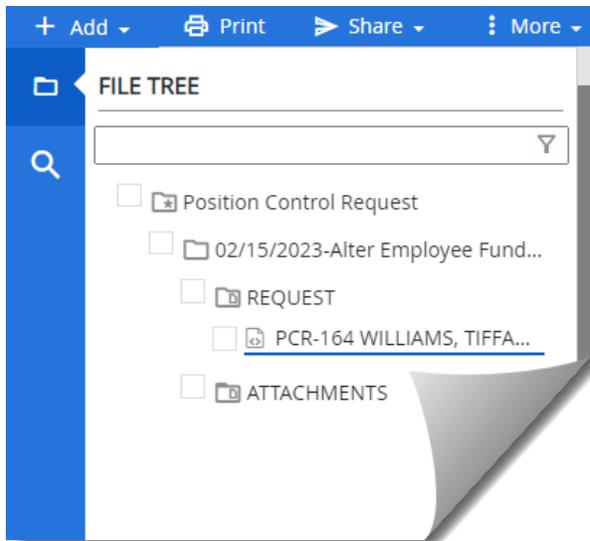
Document View



<input type="checkbox"/>		Requested	Action	Facility
<input type="checkbox"/>	 	02/09/2023	Alter Employee Funding	9441
<input type="checkbox"/>	 	02/09/2023	Alter Employee Funding	0501
<input type="checkbox"/>	 	02/09/2023	Alter Employee Funding	9441
<input type="checkbox"/>	 	02/09/2023	Alter Employee Funding	9447
<input type="checkbox"/>	 	02/09/2023	Alter Employee Funding	1131
<input type="checkbox"/>	 	02/10/2023	Add Assignment	9864
<input type="checkbox"/>	 	02/15/2023	Alter Employee Funding	0361

From the search results page, you can view employee documents. To access the file details page:

1. From the search results, single-click the  icon next to the desired employee.
2. All documents associated with the employee will be displayed in the viewer interface.



 The workflow  icon will appear if a document (form) is part of an assigned step.

Your Assignment Queue:

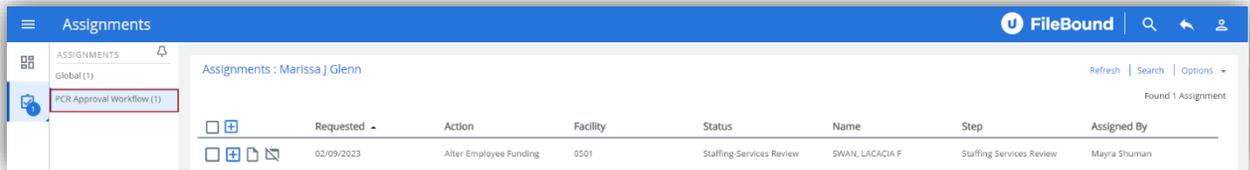
When a workflow process assigns you a task or step, your workspace will indicate that you have an assignment and provide a total number of documents (forms) awaiting action.

Example:

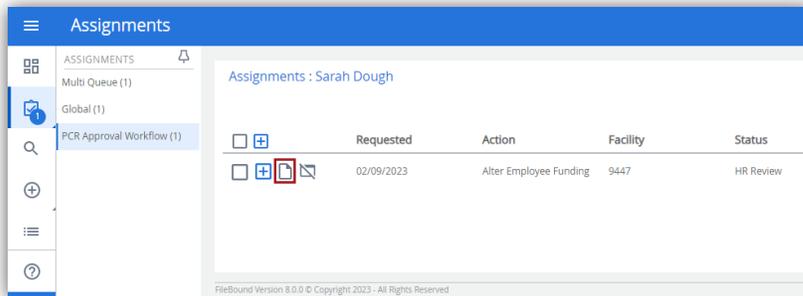


All tasks created for PCR processing will appear under the **PCR Approval Workflow** banner.

1. To view your assignments, click on the queue banner. FileBound will display a list of documents (forms) assigned to you awaiting action.



2. Click on the  icon next the desired PCR. The “Viewer” will display PCR information.



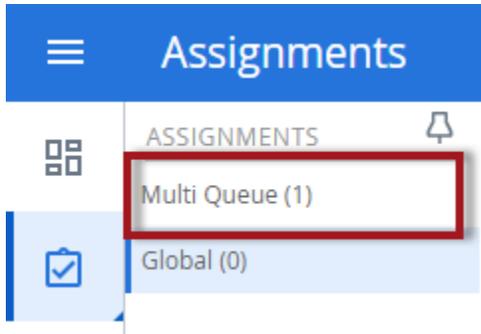
3. To complete the step, follow the instructions at the bottom of the document (form) page.

Assignment Types:

The PCR uses several different types of assignment queuing approaches. For example, some requests are sent to a specific user, while others are assigned to a group.

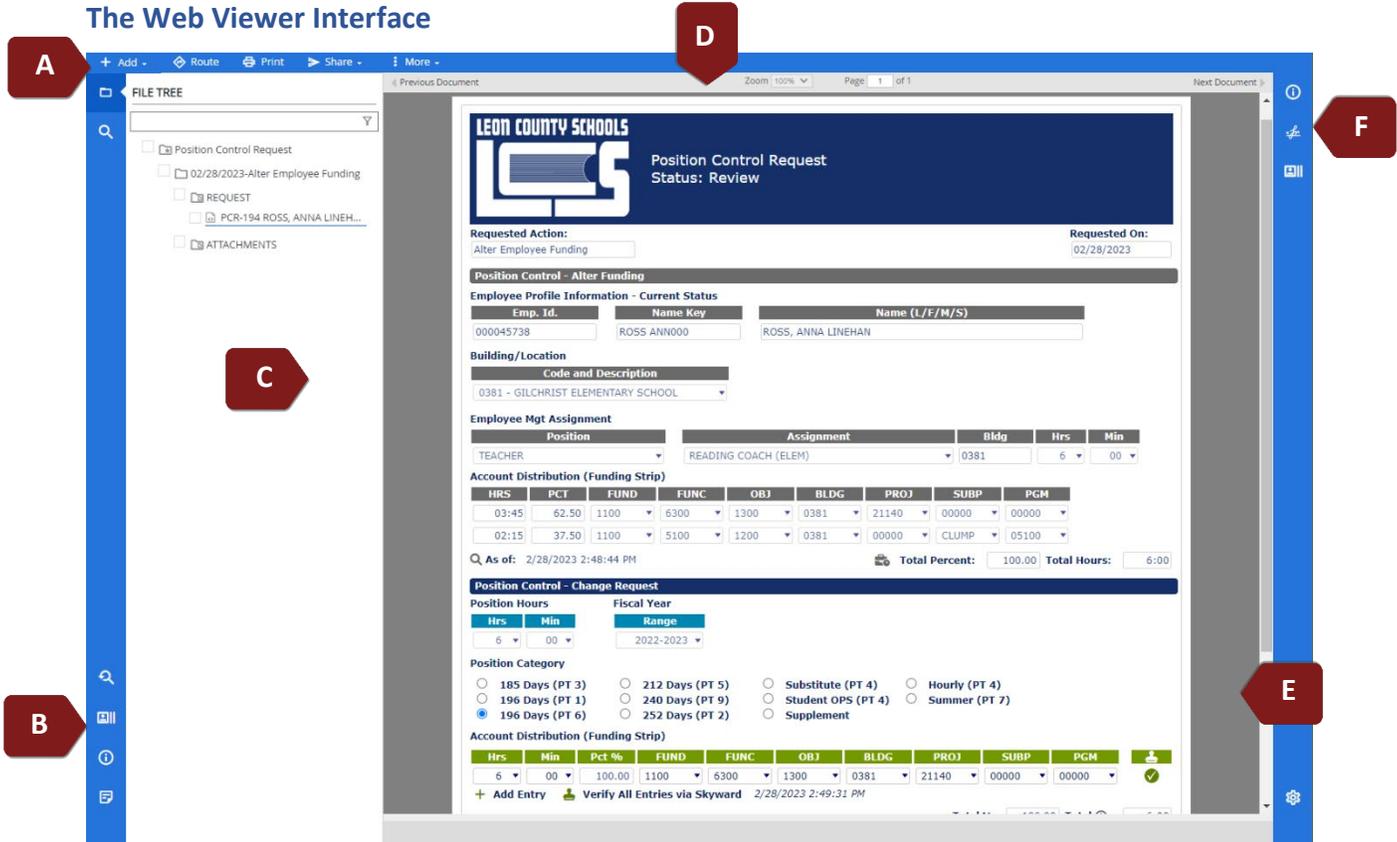
The PCR Staffing Services approval queue allows multiple users to share the workload, meaning one person can start the process. Still, another person assigned to the group can complete the step.

The PCR Human Resources (HR) approval allows assigned users to select a given PCR from the queue (Multi Queue) and complete the process. The first user who "picks" the PCR must complete the process in this scenario.



-  Multi-Queues only register assignments once a queue member has selected a PCR document.

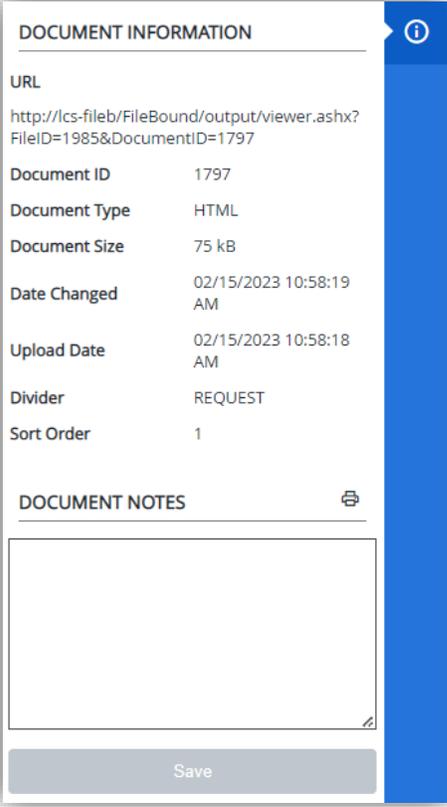
The Web Viewer Interface



FileBound provides two different interfaces to view files and documents, including forms. The following pages focus on the Web Viewer interface for workflow processing. First, however, listed below is a layout of the viewer's function and task areas:

- A** File Toolbar Displayed above the *File Content Pane-C*, the toolbar contains functions primarily related to files.
- B** File Taskbar The taskbar contains functions related to the selected file. Options provided include search, filtering, viewing file details, journal entries, and notes.
- C** File Content Pane Based on the selected taskbar option, the content pane provides file information related to the requested task.
- D** Content Toolbar Displayed above the *Content Pane-E*, the toolbar contains functions primarily related to document viewing.
- E** Content Pane Based on the selected document, the content pane displays your selection.
- F** Document Taskbar The taskbar contains functions related to the selected document. Options provided include viewing document details, managing signatures and workflow actions, journal entries, notes, and interface settings.

Document Information



DOCUMENT INFORMATION

URL
http://lcs-fileb/FileBound/output/viewer.ashx?FileID=1985&DocumentID=1797

Document ID 1797

Document Type HTML

Document Size 75 kB

Date Changed 02/15/2023 10:58:19 AM

Upload Date 02/15/2023 10:58:18 AM

Divider REQUEST

Sort Order 1

DOCUMENT NOTES

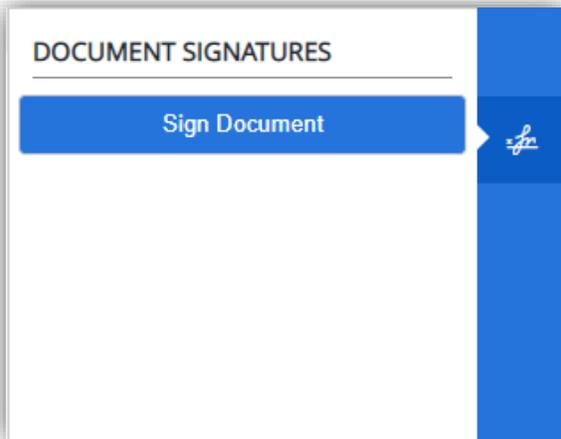
Save

The following document properties are displayed in the Document Information section:

- URL:** Displays the URL to access the document.
- Document ID:** Displays the document identification number of the document.
- Document Type:** Displays the format of the document.
- Document Size:** Displays the size of the document.
- Date Changed:** Displays the date and time that the document was last modified.
- Upload Date:** Displays the date and time that the document was uploaded to FileBound.
- Archive:** Displays the time that the archive was created and last updated.
- Divider:** Displays the name of the divider that contains the document.
- Sort Order:** Displays the sort order of the document.
- Document Notes:** Notes can be added to a document to provide additional information about the document when viewing it. These notes can also aid in retrieving the document when it is searched for.

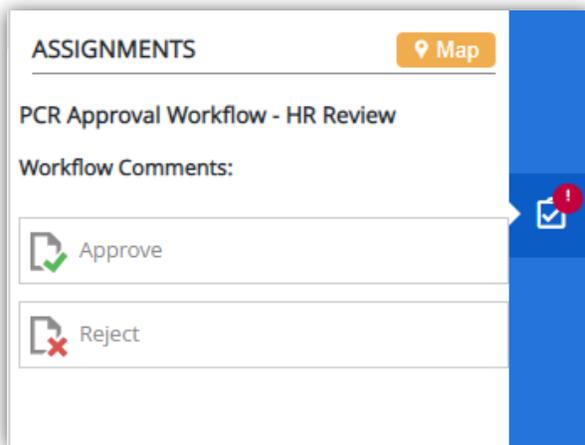
DOCUMENT FULL TEXT: When a document is scanned or imported into FileBound, Optical Character Recognition (OCR) can be performed on the document and stored. You can also specify full-text information for a document or image that is displayed within the Web Viewer. A user can then use this information to search for the document on the Search screen and within the Web Viewer.

Document Signatures



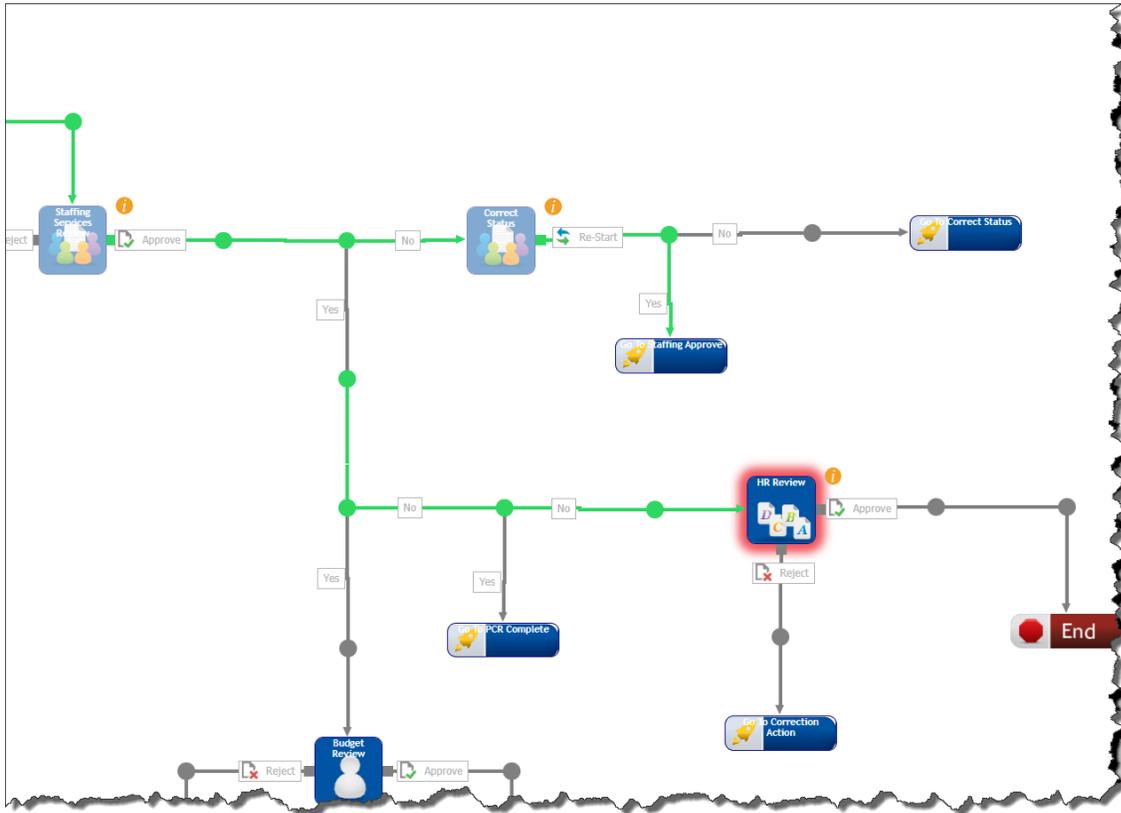
Apply document signatures. You can also send documents for signature in DocuSign or HelloSign if the integrations are enabled for your site and for the project. This feature is not configured for this project.

Assignments

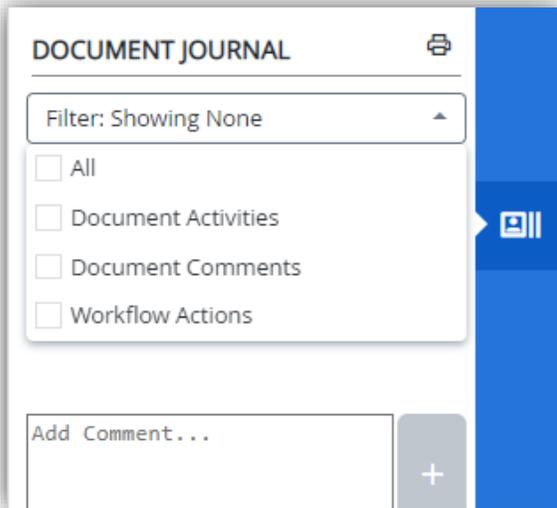


Similar to your **Assignment Queue** found on the main navigation, the configured workflow actions will appear on the assignment toolbar if you have an assigned step to complete on the document (form).

 If you need visual assistance on where you are in the workflow, click  Map. The map view shows where you are in the workflow steps.

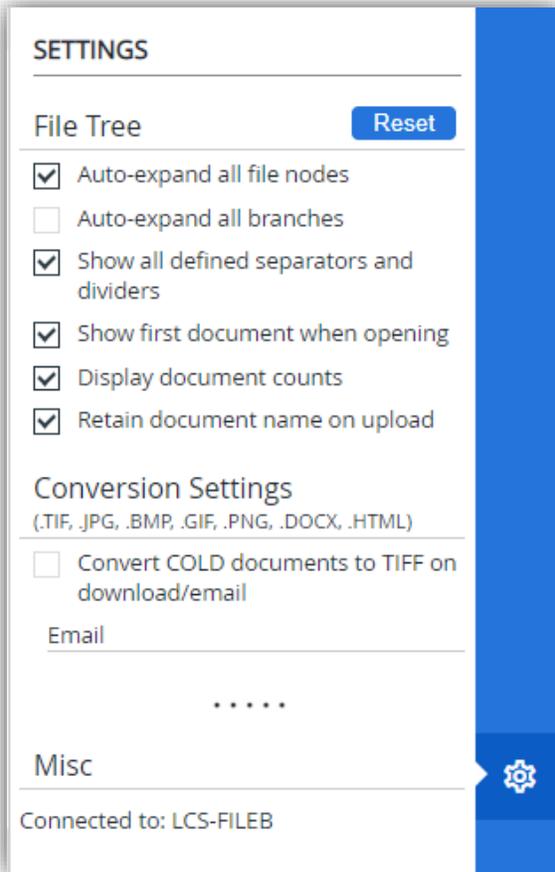


Document Journal



The Document Journal lets you see document activities, document comments, and workflow activities in a consolidated and simplified view. In addition, the entries in the Document Journal are displayed in chronological order.

Settings



The viewer can be customized using the settings option. Listed below are a few of the settings available.

General Options

- Reset: Click this button to reset user-modified menu sizes back to default sizes.
- Reload: Click this button to reload the Web Viewer with the selected settings applied.

File Tree

Auto-expand all file nodes:	Automatically expands all file nodes and separator nodes when the Web Viewer is opened.
Auto-expand all branches:	Displays all separators, dividers, and documents when the Web Viewer is opened.
Show all defined separators and dividers:	Displays all file separators and dividers in the file tree when the Web Viewer is opened. To display only file separators and dividers that contain documents in the file tree, clear this option.
Show the first document when opening:	Displays the first document of the first file when the Web Viewer is opened.
Display document counts:	Displays the document count for separators and dividers.
Retain document name on upload:	Retains the document name when uploaded.

Email

None:	Images <i>will not be</i> converted to PDF format when they are emailed.
Prompt before converting to PDF:	You will be prompted before images are converted to PDF format when they are emailed.
Auto-convert to PDF	Images are automatically converted to PDF when they are emailed.
Zip Documents on Email:	You will be prompted to enter a password for a zipped archive when documents are emailed.

Download

None:	Images <i>will not be</i> converted to PDF format when they are emailed.
Prompt before converting to PDF:	You will be prompted before images are converted to PDF format when they are emailed.
Auto-convert to PDF	Images are automatically converted to PDF when they are emailed.

Position Control Request (formerly Position Control Form)



Position Control Request

⊙ PCR Selection Menu:
Alter Employee Funding
Add Assignment

Requested On:

1. Choose an option from the ⊙ PCR Selection Menu.
2. Use "Q Search Employees" option to view/select employee assignment information to auto-populate required fields.
3. Use "Q Search Positions" option to view/select position control information to auto-populate required fields.

Note: Change of Hours & Change of Hours w/Alter Funding are made using Personnel Action Request (PAR).

Position Control - Change Request

Position Hours		Fiscal Year
Hrs	Min	Range
<input type="text" value="0"/>	<input type="text" value="00"/>	<input type="text" value="2022-2023"/>

Position Category

<input type="radio"/> 185 Days (PT 3)	<input type="radio"/> 212 Days (PT 5)	<input type="radio"/> Substitute (PT 4)	<input type="radio"/> Hourly (PT 4)
<input type="radio"/> 196 Days (PT 1)	<input type="radio"/> 240 Days (PT 9)	<input type="radio"/> Student OPS (PT 4)	<input type="radio"/> Summer (PT 7)
<input type="radio"/> 196 Days (PT 6)	<input type="radio"/> 252 Days (PT 2)	<input type="radio"/> Supplement	

Comments and Attachments

Choose Files No file chosen

Clear Selected Files

Save

New Processing Features:

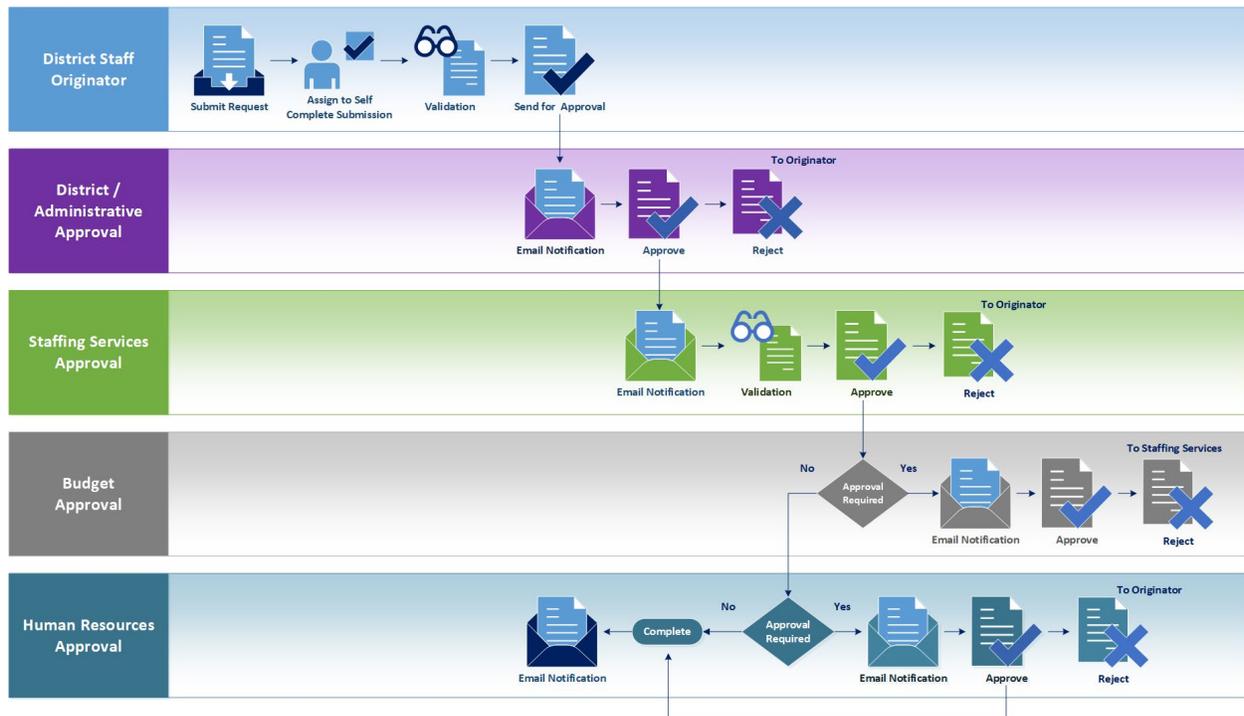
- The PCR will continue to provide one request for two (2) different processes.
 - Alter employee funding.
 - Add new assignment (unit) to position control.
- Conversion Objectives:
 - Provide a method that only displays fields necessary for the desired action.
 - Implement approaches to retrieve (pull) existing Skyward information minimizing data entry.
 - Include “smart form” tasks to facilitate user experience, including validation.
 - Improve workflow, one that provides notifications and status updates throughout the process.

- Conversion Changes:
 - ✓ Date Completed replaced with Requested Date (prefilled).
 - ✓ Skyward importing of employee, assignment, or position information.
 - ✓ Alter funding – selected assignment’s account distribution pre-calculated.
 - ✓ Fiscal Year – designation added (added)
 - ✓ Add new assignment – Unit (removed)
 - ✓ Add new assignment – Pay Type (pre-populated on selection)
 - ✓ Position Category – Supplement (added)
 - ✓ HR approval by pass

Workflow:

Workflow routes a document to a user or group to complete an action or set of actions through a predefined set of steps called a process. For example, documents can enter a workflow when scanned or imported into FileBound, or when a form is generated.

The new automated workflow provides a streamlined approach to processing form requests. The PCR workflow mimics several steps in the current Applicant Tracking Request to Post process.



PCR – Alter Employee Funding (Submission)



Position Control Request

[PCR Selection Menu:](#)
 [Alter Employee Funding](#)
 [Add Assignment](#)

Requested Action: **Requested On:**

Position Control - Alter Funding

Employee Profile Information - Current Status

Emp. Id.	Name Key	Name (L/F/M/S)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Building/Location

Position Control - Change Request

Position Hours **Fiscal Year**

<input type="text" value="Hrs"/>	<input type="text" value="Min"/>	<input type="text" value="Range"/>
<input type="text" value="0"/>	<input type="text" value="00"/>	<input type="text" value="2022-2023"/>

Position Category

185 Days (PT 3)
 212 Days (PT 5)
 Substitute (PT 4)
 Hourly (PT 4)

196 Days (PT 1)
 240 Days (PT 9)
 Student OPS (PT 4)
 Summer (PT 7)

196 Days (PT 6)
 252 Days (PT 2)
 Supplement

Account Distribution (Funding Strip)

Hrs	Min	Pct %	Fund	Func	Objt	Bldg	Proj	Subp	Pgm	
<input type="text" value="0"/>	<input type="text" value="00"/>	<input type="text"/>								

Total %: Total :

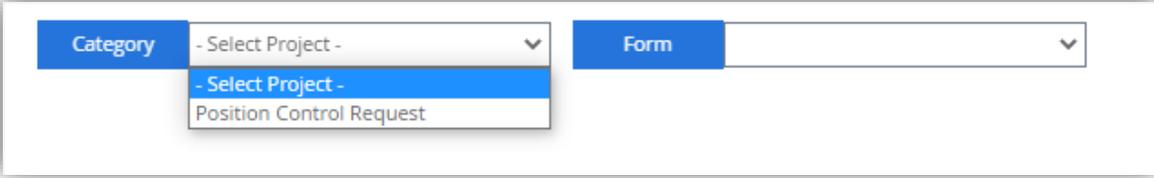
Comments and Attachments

No file chosen

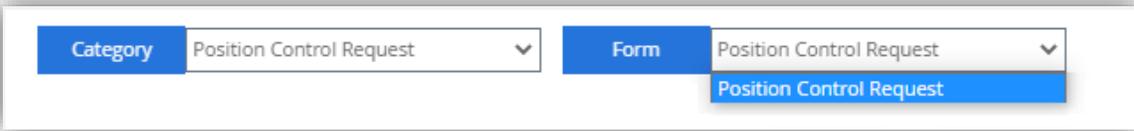
The PCR, alter employee funding, serves the same purpose as the PCF you have been using via Liquid Office.

Submitting a PCR – Alter Employee Funding:

1. From the navigation main menu, click **Forms** icon .
2. Select a project from the **Category** drop-down list, select **Position Control Request**.



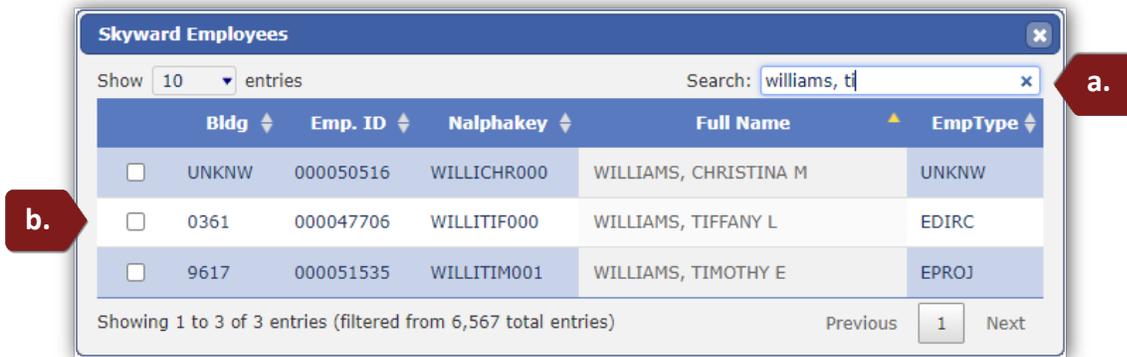
3. Select a from the **Form** drop down-down list, select **Position Control Request**



4. From the  **PCR Selection Menu**, single click **Alter Employee Funding**. The form will display information related to this type of request. The date will auto-populated.
5. A single click on **Search Employees** will provide a list of current Skyward employees from which to choose.



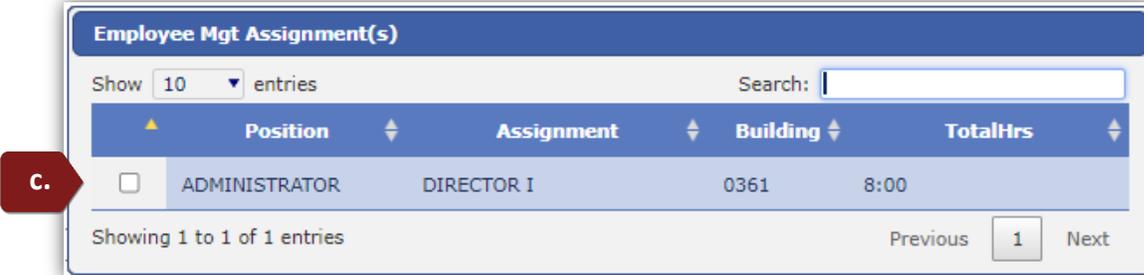
- a. Use the search to filter/find employee by the columns provided.



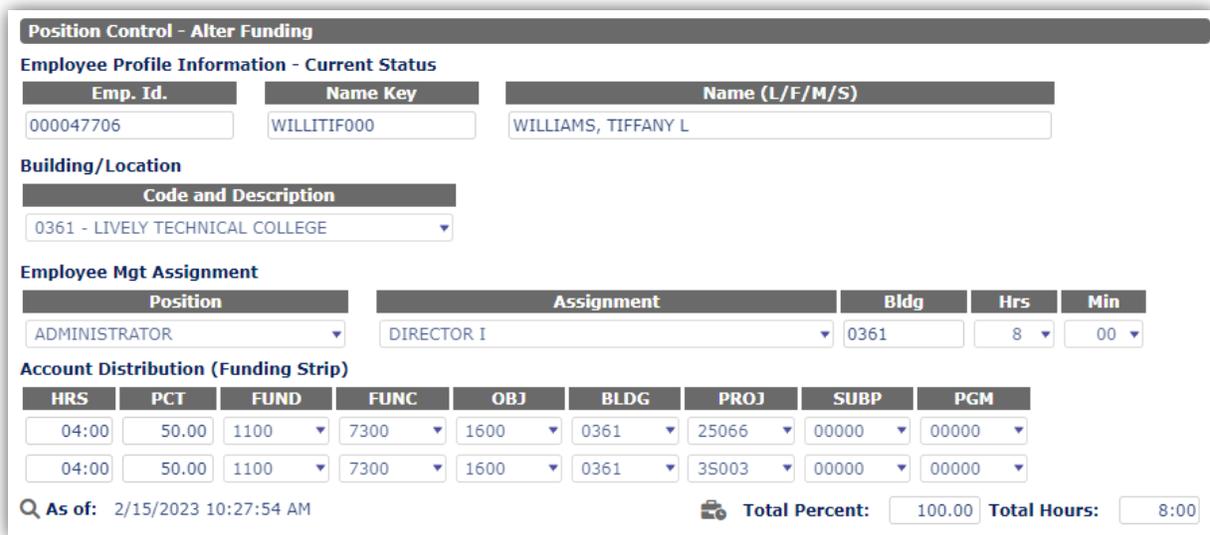
	Bldg	Emp. ID	Nalpkakey	Full Name	EmpType
<input type="checkbox"/>	UNKNW	000050516	WILLICHR000	WILLIAMS, CHRISTINA M	UNKNW
<input type="checkbox"/>	0361	000047706	WILLITIF000	WILLIAMS, TIFFANY L	EDIRC
<input type="checkbox"/>	9617	000051535	WILLITIM001	WILLIAMS, TIMOTHY E	EPROJ

- b. Single-click the check box next to the desired employee to select.

- c. A listing of current assignments will be provided; single-click the check box next to the desired assignment.



- d. The selected assignment's required Skyward information will be auto-populated.



- 6. Complete your submission by entering; the position category, new account distribution entries, comments, or upload supporting documentation and click **Save**.

Entering New Account Distribution (Funding Strip) Info.

The new PCR funding entry process uses hours and minutes dropdown options to auto-calculate percentages. For example, to add an account distribution funding strip, click + **Add**.

Account Distribution (Funding Strip)

Hrs	Min	Pct %	Fund	Func	Objt	Bldg	Proj	Subp	Pgm	
0	00									

+ **Add Entry**  **Verify All Entries via Skyward**

Total %: Total :

All funding entries are assigned one of the following icons during the validation process:

-  Funding Strip is valid – no reconciliation is required
-  Warning Project schedule expiration – is invalid, requires correction
-  Funding Strip not found in Skyward’s Chart of Accounts – is invalid, requires correction

 If you encounter validation issues with entries, contact Staffing Services for assistance.

Process Step – Complete Submission:

1. Once you have successfully submitted your request, it will be assigned to you to complete.
2. Select the request from your assignment queue and open it in the viewer.
3. Follow the instructions provided.

Process Step - Complete Submission

Please review and complete this submission.

 **Form Validation Requirements:**

- Correct identified errors.
- Account Distribution (funding strip) entries must show they are valid entries .
- Request status must be in "**Pending**" status before selecting the workflow option "*Send for Approval*".

 **Form Options:**

Select your supervisor approver:

- Use the " **Save**" option to save your progress.
- Use the " **Complete**" option to save and change document status for workflow routing.

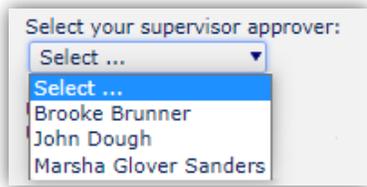
 **Workflow Routing:**

- Use the "" to route request for approval.

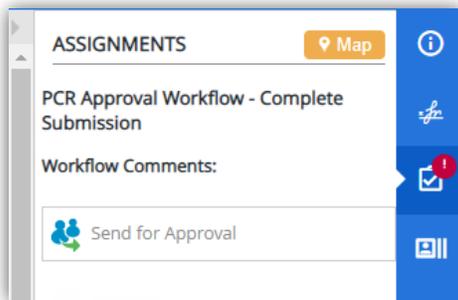
- a. Account distribution (funding strip) entries must show all valid entries  before submitting for approval. Click the " **Verify All Entries via Skyward**" option to check your entries against Skyward's chart of accounts.

 If you encounter validation issues with entries, contact Staffing Services for assistance.

- b. Select your supervisor approver from the drop-down list provided.



- 4. Click  **Save** to save your changes, or click  **Complete** to prepare your request for approval.
 -  Your request must be in a "Pending" status before sending it for approval.
- 5. Select workflow action **Send for Approval**.



PCR – Add Assignment (Submission)



Position Control Request

[PCR Selection Menu:](#) [Alter Employee Funding](#) [Add Assignment](#)

Requested Action: **Requested On:**

Position Control - Add Assignment

Building/Location

Code and Description	Employee Type
<input type="text"/>	<input type="text"/>

Position Control Mgt

Position	Assignment
<input type="text"/>	<input type="text"/>

Pay Code

Code and Description
<input type="text"/>

Position Control - Change Request

Position Hours **Fiscal Year**

Hrs	Min	Range
<input type="text" value="0"/>	<input type="text" value="00"/>	<input type="text" value="2022-2023"/>

Position Category

185 Days (PT 3) 212 Days (PT 5) Substitute (PT 4) Hourly (PT 4)
 196 Days (PT 1) 240 Days (PT 9) Student OPS (PT 4) Summer (PT 7)
 196 Days (PT 6) 252 Days (PT 2) Supplement

Account Distribution (Funding Strip)

Hrs	Min	Pct %	Fund	Func	Objt	Bldg	Proj	Subp	Pgm	
<input type="text" value="0"/>	<input type="text" value="00"/>	<input type="text"/>								

Total %: Total ⌚:

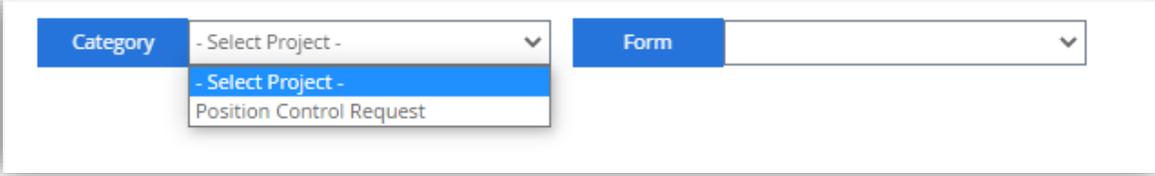
Comments and Attachments

No file chosen

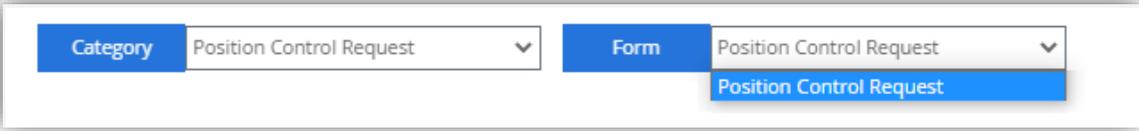
The PCR, add assignment, serves the same purpose as the PCF you have been using via Liquid Office.

Submitting a PCR – Add Assignment:

1. From the navigation main menu, click **Forms** icon .
2. Select a project from the **Category** drop-down list, select **Position Control Request**.



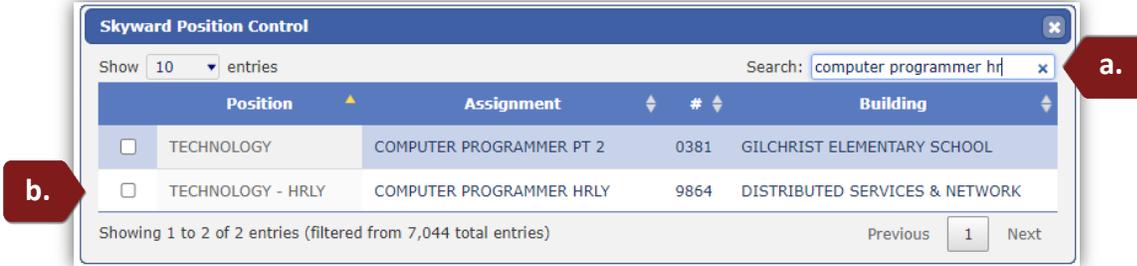
3. Select a from the **Form** drop down-down list, select **Position Control Request**



4. From the  **PCR Selection Menu**, single click **Add Assignment**. The form will display information related to this type of request. The date will auto-populated.
5. A single click on **Search Positions** will provide a list of Skyward positions based on the fiscal year selected. Refer to "[How to Request an Assignment for a New Fiscal Year](#)" for requesting position / assignments for a new fiscal year.



- a. Use the **Search:** to filter/find the position by the columns provided.



	Position	Assignment	#	Building
<input type="checkbox"/>	TECHNOLOGY	COMPUTER PROGRAMMER PT 2	0381	GILCHRIST ELEMENTARY SCHOOL
<input type="checkbox"/>	TECHNOLOGY - HRLY	COMPUTER PROGRAMMER HRLY	9864	DISTRIBUTED SERVICES & NETWORK

- b. Single-click the check box next to the desired position to select.

- c. The selected position control / assignment required Skyward information will be auto-populated.

Position Control - Add Assignment

Building/Location		Employee Type	
Code and Description		Code and Description	
9864 - DISTRIBUTED SERVICES & NETWORK			

Position Control Mgt	
Position	Assignment
TECHNOLOGY - HRLY	COMPUTER PROGRAMMER HRLY

Pay Code
Code and Description
4N81H COMPUTER PROGRAMMER HRLY

- 6. Complete your submission by entering; the new assignment employee type, position hours, category, account distribution entries, comments, or upload supporting documentation and click **Save**.

 If you "clone" an existing assignment, ensure the *Building/Location* reflects your code and description. The approval workflow will route to a supervisor approver based on the building/location code.

Entering New Account Distribution (Funding Strip) Info.:

The new PCR funding entry process uses hours and minutes dropdown options to auto-calculate percentages. For example, to add an account distribution funding strip, click + **Add**.

Account Distribution (Funding Strip)

Hrs	Min	Pct %	Fund	Func	Objt	Bldg	Proj	Subp	Pgm	
0	00									

+ Add Entry  Verify All Entries via Skyward

Total %: Total ⌚:

All funding entries are assigned one of the following icons during the validation process:

-  Funding Strip is valid – no reconciliation is required
-  Warning Project schedule expiration – is invalid, requires correction
-  Funding Strip not found in Skyward’s Chart of Accounts – is invalid, requires correction

 If you encounter validation issues with entries, contact Staffing Services for assistance.

How to Request an Assignment for a New Fiscal Year:

The selected fiscal year determines the position / assignments displayed on the **Skyward Position Control** dialog. By default, the selected fiscal year is the current one, ex: 2022-2023, until Human Resource staff perform end-of-year rollover. To select/view the Skyward position control entries for the next year:

1. Single-click on the Fiscal Year drop-down and choose the desired option.



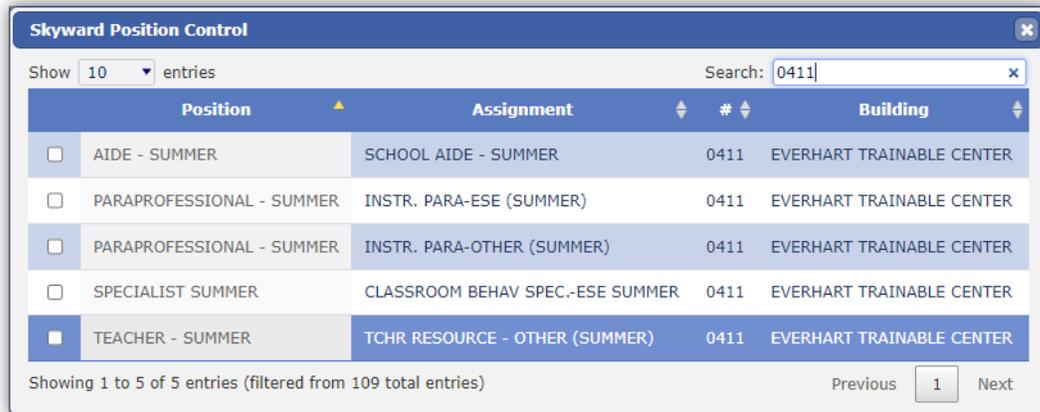
Position Control - Change Request

Position Hours **Fiscal Year**

Hrs **Min** **Range**

0 00 2023-2024 

- a. Your **Skyward Position Control** dialog will automatically reload with new position / assignment information for the selected year.



Skyward Position Control

Show 10 entries Search: 0411

	Position	Assignment	#	Building
<input type="checkbox"/>	AIDE - SUMMER	SCHOOL AIDE - SUMMER	0411	EVERHART TRAINABLE CENTER
<input type="checkbox"/>	PARAPROFESSIONAL - SUMMER	INSTR. PARA-ESE (SUMMER)	0411	EVERHART TRAINABLE CENTER
<input type="checkbox"/>	PARAPROFESSIONAL - SUMMER	INSTR. PARA-OTHER (SUMMER)	0411	EVERHART TRAINABLE CENTER
<input type="checkbox"/>	SPECIALIST SUMMER	CLASSROOM BEHAV SPEC.-ESE SUMMER	0411	EVERHART TRAINABLE CENTER
<input checked="" type="checkbox"/>	TEACHER - SUMMER	TCHR RESOURCE - OTHER (SUMMER)	0411	EVERHART TRAINABLE CENTER

Showing 1 to 5 of 5 entries (filtered from 109 total entries) Previous 1 Next

- b. Use the **Search:** to filter/find the position by the columns provided.
- c. Single-click the check box next to the desired position to select.
- d. Continue with your submission process.

Process Step – Complete Submission:

1. Once you have successfully submitted your request, it will be assigned to you to complete.
2. Select the request from your assignment queue and open it in the viewer.
3. Follow the instructions provided.

Process Step - Complete Submission

Please review and complete this submission.

1 Form Validation Requirements:

- Correct identified errors.
- Account Distribution (funding strip) entries must show they are valid entries .
- Request status must be in "**Pending**" status before selecting the workflow option "Send for Approval".

2 Form Options:

Select your supervisor approver:

Select ...

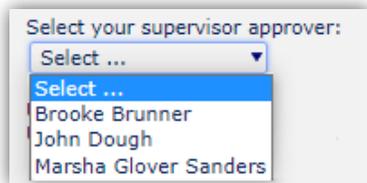
- Use the  **Save** option to save your progress.
- Use the  **Complete** option to save and change document status for workflow routing.

3 Workflow Routing:

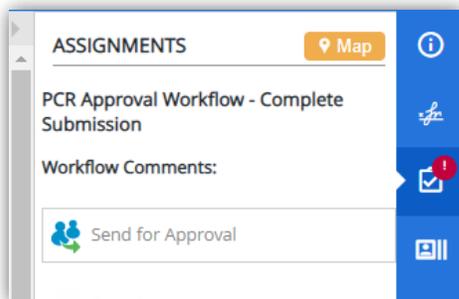
- Use the  to route request for approval.

 Save
 Complete

- a. Account distribution (funding strip) entries must show all valid entries  before submitting for approval. Click the " **Verify All Entries via Skyward**" option to check your entries against Skyward's chart of accounts.
 -  If you encounter validation issues with entries, contact Staffing Services for assistance.
- b. Select your supervisor approver from the drop-down list provided.

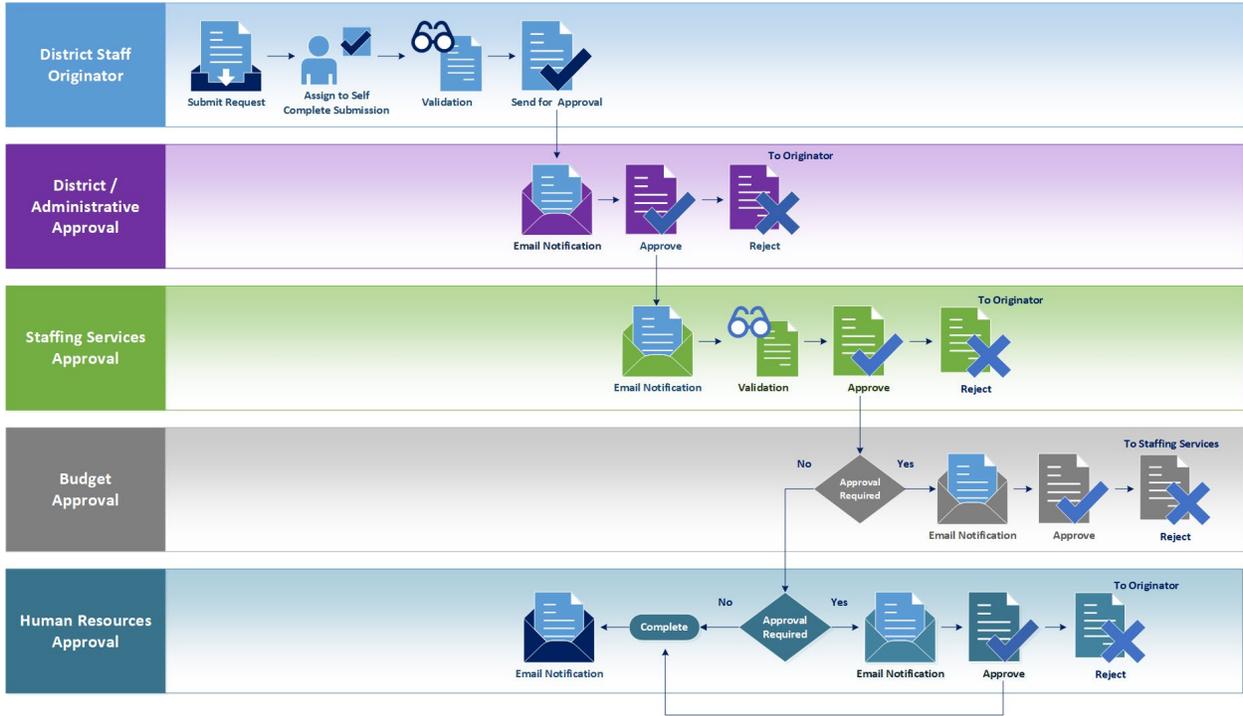


4. Click  **Save** to save your changes, or click  **Complete** to prepare your request for approval.
 -  Your request must be in a "**Pending**" status before sending it for approval.
5. Select workflow action **Send for Approval**.



Approvals

The following pages cover the workflow approval steps to complete a PCR submission.



Process Step – Supervisor Review (District / Administrative)

1. An email notification will be sent to you when a PCR has been submitted for your review and approval. Use the “**View This Assignment**” link in the email to access your assignment, or select the request from your assignment queue and open it in the viewer.

View This Assignment

A position control request has been assigned to you and is awaiting review and approval.

Workflow Information	
Routed Date	2/15/2023 11:10:32 AM
Routed By	Mayra Shuman

File and Document Information	
Request Id	164
Facility	0361
Status	Supervisor Review
Action	Alter Employee Funding
Name	WILLIAMS, TIFFANY L

2. Review submission details.
3. Follow the instructions provided.

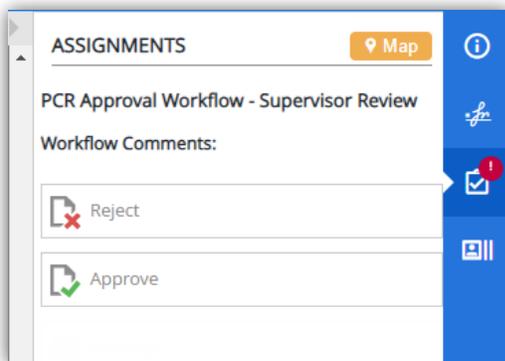
Process Step - Supervisor Review

Please review submission details.

Then select the following workflow options:

- Use the  **Reject** workflow option to route back to the requestor for correction or update.
- Use the  **Approve** workflow option to complete this step.

4. Select the appropriate workflow action.



-  If the request is "rejected," add a comment to inform the requestor of the reason for the rejection in the prompt provided.

Process Step – Staffing-Services Review

1. An email notification will be sent to the staffing services group when a PCR has been submitted for review and approval. Use the “**View This Assignment**” link in the email to access the assignment, or select the request from your assignment queue and open it in the viewer.

View This Assignment

A position control request has been assigned to the **Staffing Services** group queue and is awaiting review and approval. Click [here](#) to access the queue.

Workflow Information	
Routed Date	2/15/2023 11:22:31 AM
Routed By	John Dough

File and Document Information	
Request Id	164
Facility	0361
Requested	02/15/2023
Status	Staffing-Services Review
Action	Alter Employee Funding
Name	WILLIAMS, TIFFANY L

2. As a staffing services approver, you have three requirements to route the request successfully.

Process Step - Staffing Services Review

Please review submission details, including Account Distribution (funding strip) validation results.

 **Form Validation Requirements:**

- Account Distribution (funding strip) entries must show they are valid entries .
- Request status must be in “**Pending (Staffing-Services)**”, before selecting the workflow option “**Approve**”.

 **Form Options:**

At this time, if this request requires additional budget approval, before final review/approvals, select from the following:

Additionally, if this request **does not** require HR review/approval, the following:

No HR Review/Approval Required

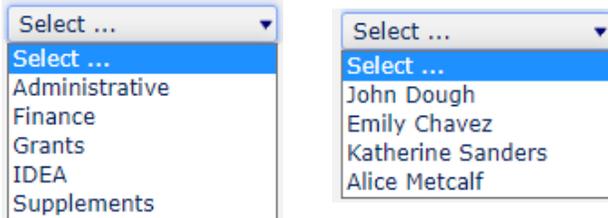
- Use the “ **Save**” option to save your progress.
- Use the “ **Complete**” option to save and change document status for workflow routing.

 **Workflow Routing:**

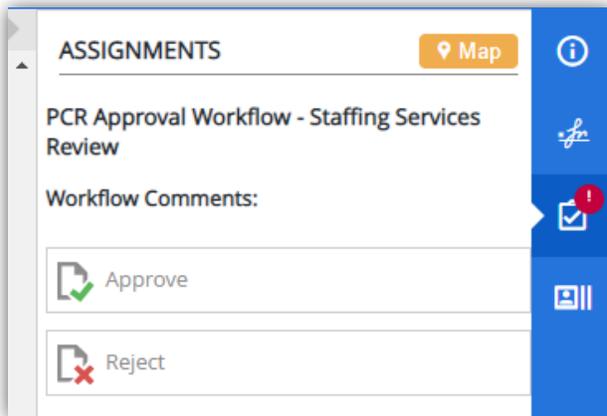
- Use the “ **Approve**” workflow option to complete this step.
- Use the “ **Reject**” workflow option to route back to the requestor for correction or update.
- Use the “” once the status is corrected to re-start the workflow.

 Save
 Complete

- a. As a staffing services approver member, you can change account distribution values. However, account distribution (function strip) entries must show all valid  entries before submitting for additional approvals. Click the “ **Verify All Entries via Skyward**” option to check your entries against Skyward’s chart of accounts.
- b. If the request requires budget review/approval, choose the office, then the staff member.



- c. If the request does not require Human Resources approval, check the “**No HR Review/Approval Required**” option.
3. Click  **Save** to save your changes, or click  **Complete** to prepare your request for additional approval.
 -  Your request must be in a “**Pending – (Staffing Services)**” status before sending it for approval.
4. Select the appropriate workflow action.

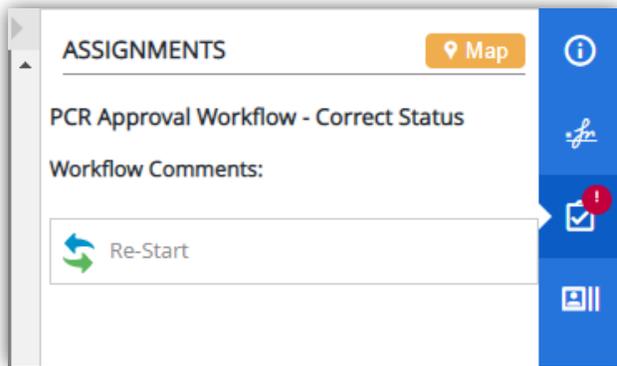


-  If the request is “*rejected*,” add a comment to inform the requestor of the reason for the rejection in the prompt provided.

PCR Workflow Restart

When the PCR status does not reflect "**Pending (Staffing Services)**", workflow validation will prevent the request from moving forward. To correct this issue:

1. Click **Complete** to change the PCR status.
2. Select workflow action **Restart**.



Process Step – Budget Review

1. An email notification will be sent to you when a PCR has been submitted for your review and approval. Use the “**View This Assignment**” link in the email to access your assignment, or select the request from your assignment queue and open it in the viewer.

View This Assignment

A position control request has been assigned to you and is awaiting review and approval.

Workflow Information	
Routed Date	2/15/2023 11:47:29 AM
Routed By	Marissa J Glenn

File and Document Information	
Request Id	164
Facility	0361
Requested	02/15/2023
Status	Budget Review
Action	Alter Employee Funding
Name	WILLIAMS, TIFFANY L

2. Follow the instructions provided.

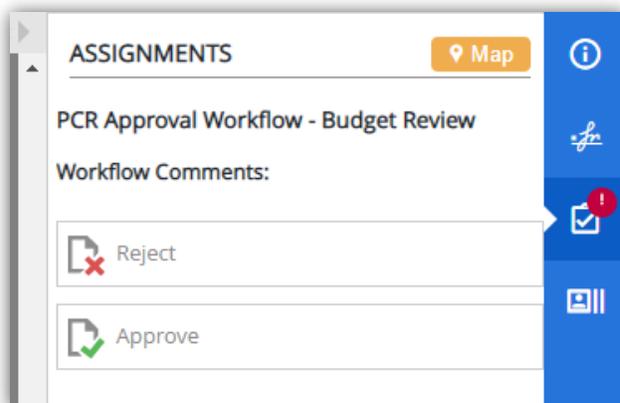
Process Step - Budget Review

Please review submission details.

Then select the following workflow options:

- Use the  **Reject** workflow option to route back for correction or update.
 - This option will route back to Staffing Services.
- Use the  **Approve** workflow option to complete this step.

3. Select the appropriate workflow action.



-  If the request is "rejected," add a comment to inform Staffing Services the reason for the rejection in the prompt provided.

Process Step – HR Review

1. An email notification will be sent to you when a PCR has been submitted for your review and approval to the HR group queue. Use the **“here”** link in the email to access the HR multi-queue, or select the request from your assignment queue and open it in the viewer.

A position control request has been assigned to the HR group queue and is awaiting review and approval. Click [here](#) to access the queue.

Workflow Information	
Routed Date	2/15/2023 1:51:29 PM
Routed By	Alice Metcalf

File and Document Information	
Request Id	164
Facility	0361
Requested	02/15/2023
Status	HR Review
Action	Alter Employee Funding
Name	WILLIAMS, TIFFANY L

2. Follow the instructions provided.

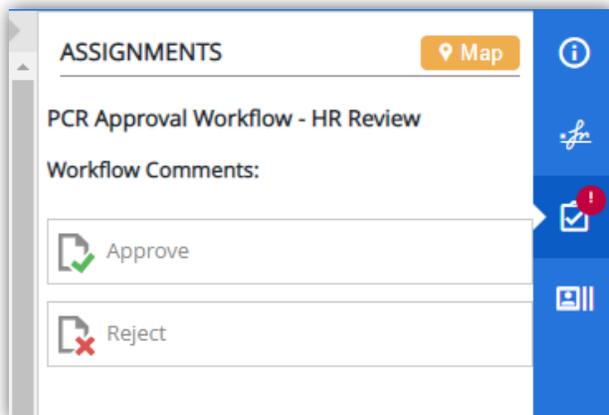
Process Step - HR Review

Please review submission details.

Then select the following workflow options:

- Use the  **Reject** workflow option to route back for correction or update.
 - This option will route back to request submitter.
- Use the  **Approve** workflow option to complete this step.

3. Select the appropriate workflow action.



-  If the request is *“rejected,”* add a comment to inform the requestor of the reason for the rejection in the prompt provided.

Process Complete - Notification

Once your PCR submission is complete, you will receive an email notification.

[View This Assignment](#)

Your request has been approved.

Workflow Information

Routed Date	2/15/2023 2:02:59 PM
Routed By	Sarah Dough

File and Document Information

Request Id	164
Facility	0361
Status	Complete
Action	Alter Employee Funding
Name	WILLIAMS, TIFFANY L