

# **Perform Historical Inquiries**

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# **ASCENDER - Position Management: Perform** Historical Inquiries

The purpose of this document is to provide you with an overview of available historical inquiries in Position Management. These inquiries are only available in the current year.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

### **Employee Historical Data Inquiry**

Run an employee historical data inquiry.

#### Position Management > Inquiry > PMIS Employee Historical Data Inquiry

The following historical inquiry is used to view historical information by employee name or employee number. The inquiry includes position data and salary information about the positions an employee has held (regular positions and supplemental positions).

Employee	Type the employee name or number. Or, click <b>Directory</b> to perform a search in the Employees directory.
Start at Update Date	Type the beginning date for the inquiry in the MMDDYYYY format. This allows you to narrow the inquiry to a specific date range.

#### Click **Retrieve**.

The following information is displayed for each employee:

- Frequency
- Employee number
- Name
- Update date The date and time a change was made to the position are displayed.
- **Begin/End** Each time current year PMIS is rolled to next year PMIS, and then rolled back to current year payroll and PMIS, a snapshot of the position is saved to this inquiry. This allows the LEA to view what an employee/position looked like at the beginning of the school year and again at the end of the school year.
- **Pos Nbr** Position Number
- Billet Billet Number

- **Pos Typ** Position Type
- Sch YR The school year (fiscal year) for each transaction is displayed.
- **Description** The billet description for the position is displayed. If the billet description is changed, the change is reflected in history.
- **Orig Type** FCS indicates a change was made in forecast (NY PMIS). MNT indicates a change was made in current year PMIS.

 $\Box$  Click  $\bigcirc$  to display the position record, distribution, and date information for the selected row. The following three tabs are available: Position Record, Distribution, and Date.

**Position Record** - This tab displays information similar to what is displayed on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab. The **Orig Type** indicates the process that was used to make the change.

Retrieve:       Print       Year: C         Employee:       000012: ADKINS, ALEXANDER LYNN       i Start at Update Date:	<ul> <li>Position Mana</li> </ul>
Select       Frequencie       Position Status         0       6       00	Year: C
D         6         000         Desk Off. 0.0         Neb Days Days Days Days Days Days Days Days	Year: C
	Close

**Distribution** - This tab displays the distribution information as it was on that date. You can view the account codes assigned to an employee in a prior fiscal year.

Inquiry	> PMI	5 Employee Historical Dat	ta Inquiry					- <b>v</b>	Positio
Retrieve		Print						Ye	ar: C
ployee: 000	0012 : A	DKINS, ALEXANDER LYNN	I Start at Update Date:	-					
ct <u>Fre</u> g	En	Position Status							
	20 20 20 20	Position Number: PCAMP	US Billet Number: 00300 Position I	Description: PRINCI	PAL Position Type: Position Up	odate Date: 07-15-2	021 08:55 Begin/	End: B Orig	Type: FCS
6	20	Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Emplr Contr	Percent	Amount
6	00	80 - Base Salary	199-23-6119.00-101-299000		A - PROFESSIONAL EMPL	1		100.000	84919.0
	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2								
	1 -								

**Date** - This tab displays dates that were manually entered for this position for districts that maintain this information in the database. These dates are not system automated.

nquiry > PMIS Employee Historical Data Inquiry		<ul> <li>Positi</li> </ul>	on Mana
Retrieve Print		Year: C	
Employee: 000012 : ADKINS, ALEXANDER LYNN Start at Update Date:			
Select Free Err Position Status			X
0 6 00 0 6 00 Position Number: PCAMPUS Billet Number: 00300 Position Description: PRINCIPAL Position Type: Position Update Date: 07-15-2021 08:55	Begin/End: B	Orig Type: FCS	
D 6 00 POSITION RECORD DISTRIBUTION DATE			
D 6 00 Dates			
Q 6 00 Date Filled: 03-26-2014			
0 6 0 Date Authorized: 03-26-2014			
O 6 00 Date Entered: 03-26-2014			
[First] (4) 1 ·			
			Close

 $\Box$  Click **Print** to print the data. The report can be saved or printed in various file formats (PDF and CSV).

Date Run:		P	AIS Employe	ee Historical Data In	quiry		Daniel of	
Unity Dist:				ISD			Page: 1 of	9
Freq Emp Nbr	Employee Name	Update Date	Begin/End	Position Number	Billet Pos	Type Position De	escription Sch Y	r Orig Type
6 000012 AD	KINS, ALEXANDER LYN	N 07-09-2015 14:27	В	COMM	00004	S CELL PHONE	2016	FCS
Amount: 300.00	Rum Fymas. 12	Exua Days.						
Position Data Extra Duty 27 - C Max Days: 0	ELL PHONE One Time Suppl: N	Type: 6	3	Primary Campus:	101	Dept:		
Dates Data Dt Filled: 05-13-201	14 Dt Authorized: 05-13	-2014 Dt Enter	red: 05-13	3-2014 Dt Vacated	:	Reason: 05		
Activity Code	Account Code	Grant	Code 1	Workers' Comp	Expense 3	73 Empir Contrib	Percent	Amount
79	199-23-6135.00-999-699	000	A		N	N Totals:	100.000	300.00 300.00
6 000012 AD	KINS, ALEXANDER LYNI	N 07-15-2016 12:07	E	COMM	00004	S CELL PHONE	2016	FCS
Amount: 300.00	Rem Pymts: 12	Extra Days:	D					
Position Data Extra Duty 27 - C Max Days: 0	ELL PHONE One Time Suppl: N	Type: E	3	Primary Campus:	101	Dept:		
Dates Data Dt Filled: 05-13-201	14 Dt Authorized: 05-13	-2014 Dt Enter	red: 05-13	3-2014 Dt Vacated	t: ••	Reason: 04		
Activity Code	Account Code	Grant	Code	Workers' Comp	Expense 3	73 Empir Contrib	Percent	Amount
79	199-23-6135.00-999-699	000	A		N	N Totals:	100.000	300.00 300.00
6 000012 AD Occupant Data Amount: 300.00	KINS, ALEXANDER LYN Rem Pymts: 12	N 07-15-2016 12:07 Extra Days: 0	B	COMM	00004	S CELL PHONE	2017	FCS
Position Data Extra Duty 27 - C Max Days: 0	ELL PHONE One Time Suppl: N	Type: E	3	Primary Campus:	101	Dept:		
Dates Data Dt Filled: 05-13-201	14 Dt Authorized: 05-13	-2014 Dt Enter	red: 05-13	3-2014 Dt Vacated	: ···	Reason: 05		
Distribution Data Activity Code	Account Code	Grant (	Code	Workers' Comp	Expense 3	73 Empir Contrib	Percent	Amount
79	199-23-6135.00-999-799	000	A		N	N Totals:	100.000	300.00 300.00
6 000012 AD Occupant Data Amount: 300.00	KINS , ALEXANDER LYNI Rem Pymts: 12	N 07-17-2017 11:56 Extra Days: 0	E	COMM	00004	S CELL PHONE	2017	FCS
Position Data Extra Duty 27 - C	ELL PHONE	Type: E	3	Primary Campus:	101	Dept:		

Max Days: 0 One Time S

A	В	C D E	F	G	н	1 1	K	L	M	N	0	P	Q	R	S	Т	U	V	W	Х	Y	Z	AA	AB	AC
1 Freq	Emp Nbr	Employee Update D: Begin/	Enc Position	NBillet	Pos Type	e Position E Sch Yr	OrigTy	pe Prim Job	Pay Grade	Pay Step	Schedule	Begin Dt	End Dt	Payoff Dt	Days Off	Nbr Days	Hourly/E	a Salary	Rem Pymt Jo	b Code	Extra Dut	Primary C	Dept	1st Pay Dt	Max Days
2	6 000012	ADKINS , /07-09-201'B	COMM	00004	s	CELL PHOT 2016	FCS	N							(	0		0 30	12 2	7 - CELL P	-8	101			01
3	6 000012	ADKINS , /07-15-201/E	COMM	00004	5	CELL PHOT 2016	FCS	N							(	0		0 30	12 2	7 - CELL F	8	101			0 1
4	6 000012	ADKINS , /07-15-201/B	COMM	00004	S	CELL PHO! 2017	FCS	N							(	0		0 30	12 2	7 - CELL P	B	101			0 1
5	6 000012	ADKINS, /07-17-201 E	COMM	00004	\$	CELL PHOT 2017	FCS	N							(	0		0 30	12 2	7 - CELL P	8	101			0 1
6	6 000012	ADKINS , /07-17-201 B	COMM	00004	5	CELL PHO! 2018	FCS	N							(	0		0 30	12 2	7 - CELL F	в	101			0 1
7	6 000012	ADKINS , /07-17-201/E	COMM	00004	s	CELL PHO! 2018	FCS	N							(	0		0 30	12 2	7 - CELL P	B	101			01
8	6 000012	ADKINS , /07-17-201/8	COMM	00004	\$	CELL PHOT 2019	FCS	N							(	0		0 30	12 2	7 - CELL F	/8	101			01
9	6 000012	ADKINS , /07-17-201 E	COMM	00004	s	CELL PHO/ 2019	FCS	N				* *			(	0		0 300	12 2	7 - CELL P	B	101			0 1
10	6 000012	ADKINS , /07-17-201 B	COMM	00004	S	CELL PHOT 2020	FCS	N							(	0		0 30	12 2	7 - CELL P	/B	101			01
11	6 000012	ADKINS , /07-10-202 E	COMM	00004	5	CELL PHOT 2020	FCS	N							(	0		0 30	12 2	7 - CELL F	/B	101			0 1
12	6 000012	ADKINS , #07-10-202/ B	COMM	00004	s	CELL PHO! 2021	FCS	N					**		(	0		0 30	12 2	7 - CELL P	B	101			0 1
13	6 000012	ADKINS , /07-15-202 E	COMM	00004	5	CELL PHOT 2021	FCS	N							(	0		0 30	12 2	7 - CELL P	-8	101			0 1
14	6 000012	ADKINS , /07-15-202 B	COMM	00004	5	CELL PHOT 2022	FCS	N							(	0		0 30	12 2	7 - CELL P	B	101			0.1
15	6 000012	ADKINS , /07-15-202 E	COMM	00004	s	CELL PHOT 2022	FCS	N							(	0		0 30	12 2	7 - CELL P	7B	101			01
16	6 000012	ADKINS , /07-15-202 B	COMM	00004	\$	CELL PHOT 2022	FCS	N								0		0 30	12 2	7 - CELL F	8	101			0 1
17	6 000012	ADKINS , /05-27-201/	PCAMPU	JS 00300	P	PRINCIPA/ 2014	MNT	Y	AP3			07-28-201	06-22-20	1:05-25-201	Ľ (	0	315.	1 67,747.00	12 1	300 - PRI	4	101		JEP	215
18	6 000012	ADKINS , /07-09-201! E	PCAMPU	JS 00300	P	PRINCIPAI 2015	FCS	Y	AP3			07-28-201	06-22-20	1:06-25-201	Ľ (	0	315.	1 67,747.0	12 1	300 - PRI	4	101		JEP	215 1
19	6 000012	ADKINS , /07-09-201: B	PCAMPU	US 00300	P	PRINCIPA/ 2016	FCS	Y	AP3			07-27-201	06-22-20	1 06-23-201	u (	215	332.6	9 71,528.00	12 1	300 - PRI	d	101		JEP	215 1
20	6 000012	ADKINS , /08-11-201	PCAMPU	JS 00300	P	PRINCIPAI 2016	MNT	Y	AP3			07-27-201	06-22-20	1/05-23-201	U C	215	332.6	9 71,528.0	12 1	300 - PRI	4	101		JEP	215 /
21	6 000012	ADKINS , /07-15-201/E	PCAMPU	US 00300	P	PRINCIPAJ 2016	FCS	Y	AP3			07-27-201	06-22-20	1/06-23-201	u (	215	332.6	9 71,528.35	12 1	300 - PRI	4	101		JEP	215
22	6 000012	ADKINS , /07-15-201/B	PCAMPU	US 00300	P	PRINCIPAI 2017	FCS	Y	AP3			07-25-201	06-22-20	1 06-22-201	Ľ (	215	339.24	3 72,937.0	12 1	300 - PRI	1	101		JEP	215
23	6 000012	ADKINS , /07-17-201 E	PCAMPU	US 00300	p	PRINCIPAI 2017	FCS	Y	AP3			07-25-201	06-22-20	1 05-22-201	i (	215	339.24	3 72,937.0	12 1	300 - PRI	4	101		JEP	215 1
24	6 000012	ADKINS , /07-17-201 B	PCAMPU	US 00300	P	PRINCIPAJ 2018	FCS	Y	AP3			07-24-201	06-21-20	1/06-25-201	u (	215	346.02	8 74,396.00	12 1	300 - PRI	4	101		JEP	215
25	6 000012	ADKINS , /07-17-201; E	PCAMPU	US 00300	P	PRINCIPAI 2018	FCS	Y	AP3			07-24-201	06-21-20	1:05-25-201	Li (	215	346.02	8 74,396.00	12 1	300 - PRI	1	101		JEP	215 1
26	6 000012	ADKINS , /07-17-201/B	PCAMPU	US 00300	P	PRINCIPAI 2019	FCS	Y	AP3			07-23-201	06-20-20	1:06-25-201	Ŀ (	215	352.58	1 75,805.00	12 1	300 - PRI	4	101		JEP	215
27	6 000012	ADKINS , /07-17-201 E	PCAMPU	US 00300	P	PRINCIPAI 2019	FCS	Y	AP3			07-23-201	06-20-20	1:06-25-201	Ľ (	215	352.58	1 75,805.00	12 1	300 - PRI	1	101		JEP	215
28	6 000012	ADKINS , /07-17-201 B	PCAMPU	JS 00300	p	PRINCIPAI 2020	FCS	Y	AP3			07-22-201	06-18-20	2105-25-202	8 0	215	378.73	7 81,428.00	12 1	300 - PRI		101		JEP	215 1
29	6 000012	ADKINS , /07-10-2021E	PCAMPU	US 00300	P	PRINCIPAI 2020	FCS	¥	AP3			07-22-201	06-18-20	2106-25-202	8 (	215	378.73	7 81,428.00	12 1	300 - PRI	1	101		JEP	215
30	6 000012	ADKINS , /07-10-202/ B	PCAMPU	US 00300	P	PRINCIPAI 2021	FCS	Y	AP3			07-01-202	06-30-20	2 06-25-202	2 (	215	388.08	5 83,438.00	12 1	300 - PRI	1	101		JEP	215
31	6 000012	ADKINS , /07-15-202 E	PCAMPU	US 00300	p	PRINCIPAI 2021	FCS	¥	AP3			07-01-202	06-30-20	2 05-25-202	2 (	215	388.08	5 83,438.00	12 1	300 - PRI	1	101		JEP	215
32	6 000012	ADKINS , /07-15-202 B	PCAMPU	US 00300	P	PRINCIPAI 2022	FCS	Y	AP3			07-26-202	06-30-20	2.06-24-202	2 (	215	394.97	1 \$4,919.00	12 1	300 - PRI	1	101		JEP	215
33	6 000012	ADKINS , /07-15-202 E	PCAMPU	US 00300	P	PRINCIPAI 2022	FCS	Y	AP3			07-26-202	06-30-20	2.05-24-202	2 (	215	394.97	1 84,919.00	12 1	300 - PRI	JI.	101		JEP	215
34	6 000012	ADKINS , /07-15-202 8	PCAMPU	US 00300	p	PRINCIPAI 2022	FCS	¥	AP3			07-26-202	06-30-20	2:06-24-202	2 (	215	398.5	2 85,681.80	12 1	300 - PRI	1	101		JEP	215
35																									
36																									
37																									
38																									

### **Position Data Inquiry**

Run a position data inquiry.

Position Management > Maintenance > PMIS Position History OR Position Management > Maintenance > PMIS Supplement History

This page is used to view historical position changes. Since each change made to a position management record creates a new historical record, many records may exist for an employee. Each change in position (CIP), position maintenance, and forecast moves are displayed on this page. This information is helpful if CIP calculation results are not as expected. You can review all position history or specific billet history.

This data serves as a historical record and should not be modified.

Position Number	Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.
	If the position number is not known, click <sup>‡</sup> . The Positions pop-up window opens with a list of all positions.
	To search for specific positions, type data in one or more of the search fields. Click <b>Search</b> . A list of data that matches the search criteria is displayed.
	Select a position number from the list. Otherwise, click <b>Cancel</b> .

Position Description	Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.
	If the position description is not known, click $^{\ddagger}$ . The Positions pop-up window opens with a list of all positions.
	To search for specific positions, type data in one or more of the search fields. Click <b>Search</b> . A list of data that matches the search criteria is displayed.
	Select a position number from the list. Otherwise, click <b>Cancel</b> .

□ Click **Retrieve**. A list of all employees who have held the position along with all of the associated billet numbers is displayed.

Billet	Type the specific billet number used to identify the various positions within the
Number	position number to narrow the search results. The field can be a maximum of five
	digits. Leading zeros are not required.

□ Click **Retrieve**. A list of all employees who have held the position with the specified billet number is displayed. The following details are displayed.

- Billet
- Sch YR
- Update Date
- Description
- Orig Type
- **Begin/End** Each time current year PMIS is rolled to next year PMIS, and then rolled back to current year payroll and PMIS, a snapshot of the position is saved to this inquiry. This allows the LEA to view what an employee/position looked like at the beginning of the school year and again at the end of the school year.
- Freq
- Emp Nbr
- Name

 $\Box$  Click  $\bigcirc$  to view the position details at the date and time displayed under **Update Date**. Changes to the billet description are displayed on this page. A pop-up window with three tabs (Position Record, Distribution, and Date) is displayed.

**Position Record** - This tab displays information similar to what is displayed on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab. The **Orig Type** indicates the process that was used to make the change.

A Maintenanc	> PMIS Position History
Save	Year: C
Position Number[P	CAMPUS Position Description PRINCIPAL Billet Number 00300 Retrieve Add Position
HISTORY	Edit Position
Delete Ed	t Position Number: PCAMPUS Billet Number: 00300 Position Description: PRINCIPAL Position Type: Position Update Date: 07-15-2021 10:15 Begin/End: B Orig Type: FCS
	POSITION RECORD DISTRIBUTION DATE
	Occupant
	Emp Nbr: 000012 Emp Name: ALEXANDER LYNN ADKINS
	Primary Job: J Pay Grade: AP3
0 0	Begin Date: 07-26-2021 End Date: 06-30-2022 Payoff Date: 06-24-2022
	Days Off. 0.0 HrlyDly Rate: 398.520 Salary: 85,681.80 Rem. Payments: 12
	Position
1	Freq: 6 - Monthly CYR V School Yr: 2022 V
	Job Code: 1300 - PRINCIPAL 1st Pay Date Code: JEP Category.
0 0	Primary Campus: 101 - ELEMENTARY SCHOOL
	Hrs Per Day: 0.000 Pct Day Employed: 100 Pct Yr Employed: 100
	Pay Concept: Midpoint Max Days: 215.0 Orig Type: Move Forecast to CYR V Begin/End: Begin V
First 4	
	Save Cancer

**Distribution** - This tab displays the distribution information as it existed on the selected date. The account codes assigned to an employee in a prior fiscal year can also be viewed.

Maintenance > Pl	MIS Position History V Position Management	
Save	Year: C	
Position Number PCAMP	PUS Position Description[PRINCIPAL : Billet Number[00300 Retrieve Add Position	
HISTORY	Edit Position	
	Position Number: PCAMPUS Billet Number: 00300 Position Description: PRINCIPAL Position Type: Position Update Date: 07-15-202110.15 Begin/End: 8 Orig Type: FCS	
Delete Edit	POSITION RECORD DISTRIBUTION DATE	
	Activity Code Account Code Grant Code Workers' Comp Expense 373 Emplr Contr Percent Amount	
	80 - Base Salary V 199-23-6119.00-101-299000 A - PROFESSIONAL EMPL V V 100.000 85681.8	
0	Totals: 100.000 85,681.80	
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First 4 1 V	1 Save Cancel	

**Date** - This tab displays dates that were manually entered for this position for districts that maintain this information in the database. These dates are not system automated.

A Mainter	nance > PM	IIS Position History	✓ Position Management ▮		
Save					Year: C
Position Numb	er PCAMPU	US Position Description PRINCIPAL	Billet Number 00300 Retrieve	Add Positio	m
HISTORY	1	Edit Position			×
Delete	Edit	Position Number: PCAMPUS Billet Number: 00300 Position Description: PRINCIPA	L Position Type: Position Update Date: 07-15-2021 10	15 Begin/End: 8	Orig Type: FCS
		POSITION RECORD     DISTRIBUTION     DATE       Dates     Date Filled:     03-26-2014       Date Authorized:     03-26-2014       Date Entered:     03-26-2014       Date Vacated:     •   Vacated Reason:			
First	1 •/1		(	Save	Cancel

The **Add Position** button implies that changes can be made; however, this button does not function since this is a historical file and maintenance should not be done. This page does not include a print option.



## **Back Cover**