



# **Procedure Manual**

**HOW TO ACCESS THE  
OPS EMPLOYEE FILE**

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## Introduction to PeopleSoft

### *Signing on to PeopleSoft*

Users will access the PeopleSoft application via the myUCF portal.

1. Open the Internet browser on the desktop.
2. In the address field, type in **my.ucf.edu**.
3. Under **myUCF Login**, click on **Sign On**

The following window will appear:

UNIVERSITY OF CENTRAL FLORIDA

Quicklinks:  ucf Search UCF

### UCF Federated Identity

Sign on:


**NID:**

**Password:**

By signing on, you agree to the [Terms of the UCF Information Technologies and Resources Policy](#)

- [What is my NID?](#)
- [What is my NID Password?](#)
- [What is Federated Identity?](#)

my.ucf.edu  
You have asked to login to my.ucf.edu

 **UCF**  
Stands For Opportunity

4. Enter your NID and NID password. Click on **Sign On**.

The following window will appear:

The screenshot shows the myUCF Menu and Featured Topics section. The myUCF Menu is expanded to show Staff Applications, with Human Capital Management highlighted. The Featured Topics section is empty, displaying the message: "There are no featured topics to display at this time."

UNIVERSITY OF CENTRAL FLORIDA

Home Page | Student Message Center | Online Course Tools | Dashboards | Informational Resources

myUCF Menu

- ▷ Academic Resources
- ▼ Staff Applications
  - F&A Monthly Reports
  - Pegasus Mine Portal
  - Campus Solutions
  - Human Capital Management
- ▷ Student Self Service
- ▷ Employee Self Service
- ▷ Manager Self Service
- ▷ Faculty/Advisor Self Service
- ▷ Reporting Tools
  - Knights Access Login
  - Change my NID Password
  - Update my Challenge Questions
  - Knights Email
  - UCF Home Page
  - UCF COM Home Page

Featured Topics

There are no featured topics to display at this time.

Home | Content | Layout | Help | Feedback | Sign out

Under **Staff Applications**, select **Human Capital Management**. The following window will appear:

The screenshot shows the myUCF website header. The navigation links are: myUCF | Home | Worklist | Add to Favorites | Sign out. The UCF logo is visible on the left, and a Help link is visible on the right.

myUCF | Home | Worklist | Add to Favorites | Sign out

UCF

? Help

If an attempt to logon to PeopleSoft fails, it may be necessary to clear the cache to remove files remaining in the computer from previous uses. Please refer to pages 3-4 (Clearing the Cache)

If you successfully logged into PeopleSoft, proceed to Page 5 (Running the OPS Employee File).

## Clearing the Cache

### Steps for Clearing the Cache

Follow this procedure to clear the cache using the Internet Explorer browser. If you're using another browser, please click on the link below from CS&T for additional assistance.

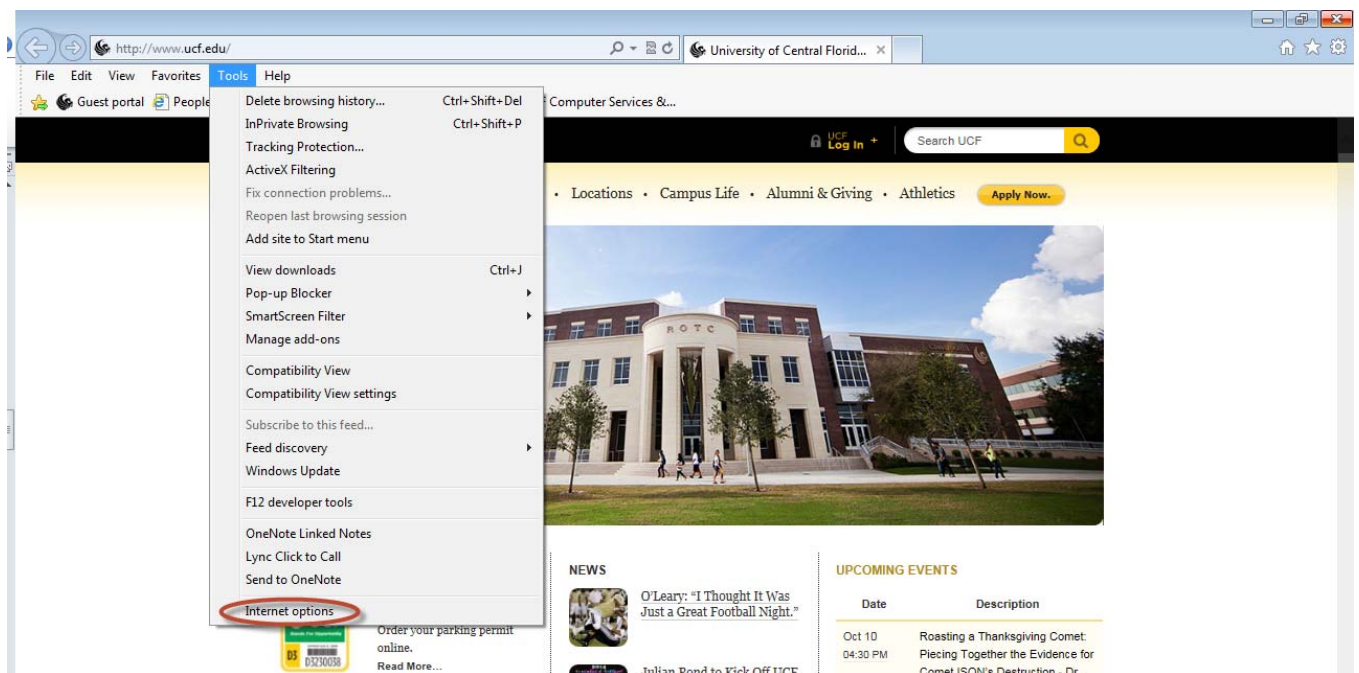
[http://ucf.custhelp.com/app/answers/detail/a\\_id/1415](http://ucf.custhelp.com/app/answers/detail/a_id/1415)

Windows may appear slightly different than the ones printed in this procedure, depending on the user's operating system (Windows NT, Windows 2000, etc).

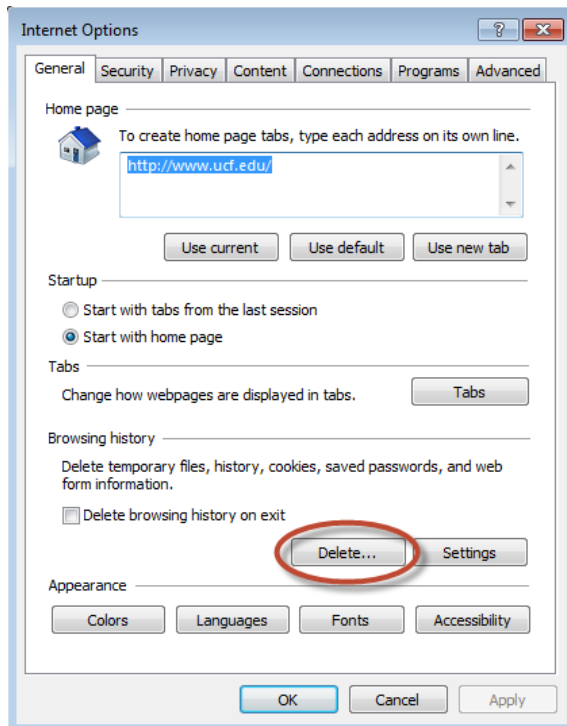
First, close all PeopleSoft windows, then follow this navigation:

Click on **Tools**

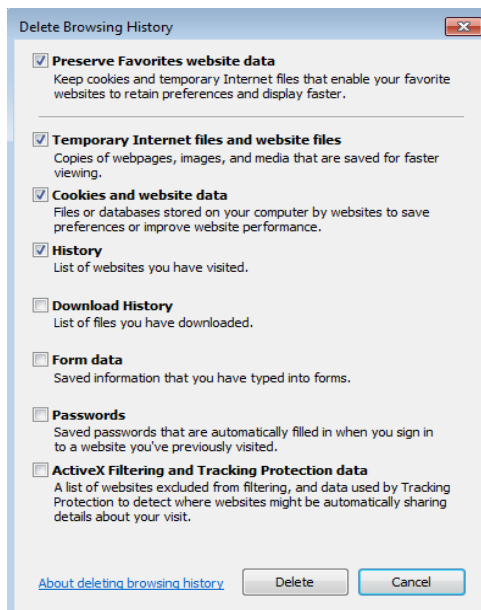
Click on **Internet Options**



The following window will appear:



On the **General** tab, under **Browsing History**, click on **Delete**. The following window will appear.



Make sure that any applicable checkboxes are selected (at least **Temporary Internet Files**, **Cookies**, and **History**), then click on **Delete**.

Click **OK** on the Internet Options window to close it.

Try to log on to PeopleSoft again.

## Running the OPS Employee File

### *What is the OPS Employee File?*

The “OPS Employee File” is a report that lists all active OPS employees by area/college.

Note: Post Docs are listed on the Faculty/Staff Position File since they have a position number and are eligible for additional state benefits.

### *Running the File*

#### *Navigation:*

Main Menu > HR Custom > Academic Affairs > Report > OPS Employee File

The following window will appear:

OPS Employee File

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Limit the number of results to (up to 300): 300

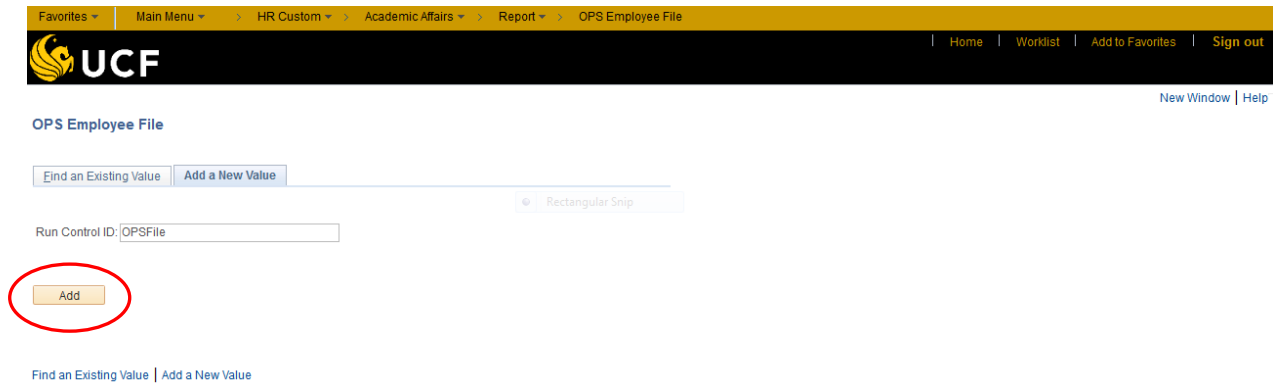
Search Advanced Search

Find an Existing Value | Add a New Value

### *Run Control ID*

The first time a process/report is run in PeopleSoft, a Run Control ID must be established. The Run Control ID is simply an identifier so that PeopleSoft can recognize which process is being run.

Click on ‘Add a New Value’ and enter a name that best meets your needs. In this example, the run control could be named ‘OPSFile.’ Do not use special characters or spaces in the name. Only letters, numbers, and the underscore character should be used.



Navigation: Favorites > Main Menu > HR Custom > Academic Affairs > Report > OPS Employee File

UCF | Home | Worklist | Add to Favorites | Sign out

New Window | Help

### OPS Employee File

Find an Existing Value | Add a New Value

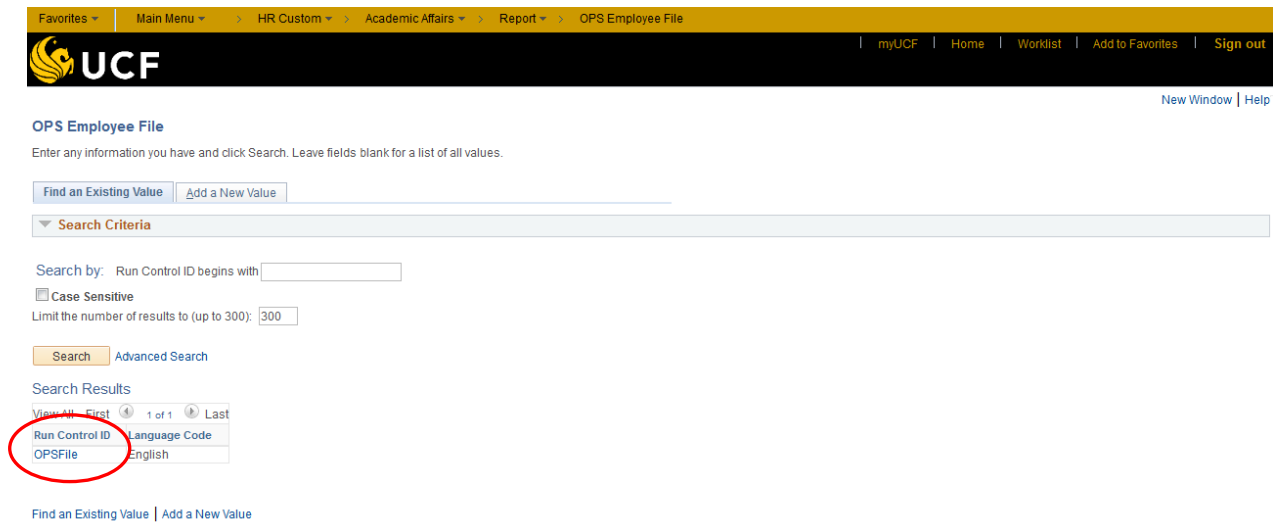
Run Control ID: OPSFile

**Add**

Find an Existing Value | Add a New Value

Click on **'Add'**.

Thereafter, to run this report, click on Search and select the desired Run Control ID from your list of run controls.



Navigation: Favorites > Main Menu > HR Custom > Academic Affairs > Report > OPS Employee File

myUCF | Home | Worklist | Add to Favorites | Sign out

New Window | Help

### OPS Employee File

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Limit the number of results to (up to 300): 300

Search | Advanced Search

#### Search Results

View All | First | 1 of 1 | Last

Run Control ID	Language Code
OPSFile	English

Find an Existing Value | Add a New Value

The following page will appear:



## Run Control Page

Run Control ID: OPSFile      Report Manager Process Monitor      **Run**

Program: ZHR13926.SQR  
Purpose: Creates a file of current OPS Employees

Save    Return to Search    Notify    Add    Update/Display

Run the process by clicking the run icon.

The following page will appear:

### The Process Scheduler Request Page

1. Server Name = PSUNX
2. Select = this field must be checked
3. Format = PDF or CSV. The report will automatically open in Excel.

Process Scheduler Request

User ID: pthomas      Run Control ID: OPSFile

Server Name: **PSUNX**      Run Date: 04/17/2015      by

Recurrence:      Run Time: 10:17:46AM      Reset to Current Date/Time

Time Zone:      FTP Control Command:

Select	Description	Process Name	Process Type	*Type	Format	Distribution
<input checked="" type="checkbox"/>	OPS Employee File	ZHR13926	SQR Report	Web	<b>PDF</b>	Distribution

OK    Cancel

The Process Scheduler Request Screen will appear again. Click on **OK**.

The following page will appear:

## Viewing the OPS Employee File

Click on link

Process Instance Number

Process Instance:11113287

Program: ZHR13926.SQR  
Purpose: Creates a file of current OPS Employees

A Process Instance number (circled above) on this page is an indication that the report is running. The user may monitor the progress of the report by clicking on the **Process Monitor** link.

The following page will appear:

## Process Monitor

Process List | Server List

View Process Request For

User ID: pthomas Type: Last 1 Days Refresh Refresh Button

Server: Name: Instance: to:

Run Status: Distribution Status:  Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11113287		SQR Report	ZHR13926	pthomas	04/17/2015 10:17:46AM EDT	Processing	N/A	Details

Go back to OPS Employee File

Save Notify

Process List | Server List

Click on the **Refresh** button. The OPS Employee File (ZHR13926) will appear at the top of the list. This page displays necessary information such as the report or process being run, the instance number, the run date and time, along with the run status. If at any time the Run Status displayed is “Error,” email HR Information Systems at [hris@ucf.edu](mailto:hris@ucf.edu) for further assistance. It is important to make note of the process being run, date, time, and the instance number.

In order to see the progress of the report in the Process Monitor, continue to click the **Refresh** button. When the Run Status column reflects ‘**Success**’ and the Distribution Status column reflects ‘**Posted**’ you will be able to access the report by clicking on the ‘**Details**’ hyperlink.



A new report or process should not be run until the current report or process is completed successfully.

This will take you to the Process Details page. Click on the View Log/Trace hyperlink to access the report.

**Process Detail**

**Process**

Instance 11113287      Type SQR Report  
 Name ZHR13926      Description OPS Employee File  
 Run Status Success      Distribution Status Posted

**Run**      **Update Process**

Run Control ID OPSFile       Hold Request  
 Location Server       Queue Request  
 Server PSUNX       Cancel Request  
 Recurrence       Delete Request  
                           Restart Request

**Date/Time**      **Actions**

Request Created On 04/17/2015 10:25:54AM EDT      Parameters      Transfer  
 Run Anytime After 04/17/2015 10:17:46AM EDT      Message Log  
 Began Process At 04/17/2015 10:25:59AM EDT      Batch Timings  
 Ended Process At 04/17/2015 10:27:17AM EDT      **View Log/Trace**

OK      Cancel

On the View Log/Trace page, click on the hyperlink with the report name and “.CSV.”

**View Log/Trace**

**Report**

Report ID 5265591      Process Instance 11113287      Message Log  
 Name ZHR13926      Process Type SQR Report

Run Status Success

OPS Employee File

**Distribution Details**

Distribution Node reportnode      Expiration Date 06/01/2015

**File List**

Name	File Size (bytes)	Datetime Created
SQR_ZHR13926_11113287.log	1,975	04/17/2015 10:27:17.767223AM EDT
zhr13926_11113287.out	32,330	04/17/2015 10:27:17.767223AM EDT
zhr13926_11113287_OPS_Empl.csv		04/17/2015 10:27:17.767223AM EDT

**Distribute To**

Distribution ID Type \*Distribution ID  
 User pthomas

Return

The report will open in Excel.

	Highest Degree	Degree Description	Principal Place	Hire Date	Salary Address	Salary Admin	Job Code	Job Title	Home Department	Home Department Description	Budget End	VP Org	College/Division
1	BA	Bachelor of	MAIN	#####	00	OPS Hourl	011	Clerk	09100001	LIB-OPER/E&G	5TL000	AA-ITR-LIE	ACADEMIC
2	MPA	Master of	MAIN	#####	06	OPS AdjFa	9004A	Instructor	18652001	CJ-PAYRO E&G	560000	AA-COLLE	ACADEMIC
3	MA	Master of	MAIN	1/2/2008	06	OPS AdjFa	9166A	Research	24032001	BIO SCI-P/E&G	5C0000	AA-COLLE	ACADEMIC
4	BA	Bachelor of	MAIN	#####	00	OPS Hourl	064	Registered	03420301	CL HLTH-A AUX	550000	AA-STUDE	ACADEMIC
5	BA	Bachelor of	MAIN	7/6/2010	00	OPS Hourl	011	Clerk	23222001	HIST-PAYF E&G	580000	AA-COLLE	ACADEMIC
6	PHD	Doctor of	MAIN	1/9/2012	06	OPS AdjFa	9004A	Instructor	18652001	CJ-PAYRO E&G	560000	AA-COLLE	ACADEMIC
7	EDD	Doctor of	MAIN	#####	01	Dual Com	9004X	Instructor	23262001	WRITING E&G	580000	AA-COLLE	ACADEMIC
8													

**NOTE:** For easy reference, below is the list of field names in the order they appear in the spreadsheet.

Field Name
Last Name
First Name
MI
Employee ID (Empl ID)
Employee Record (Empl Rcd)
Ethnic Group
Gender
Birth Year
Highest Degree
Highest Degree Description
Principal Place of Employment
Date of Hire
Salary Admin Plan (Code)
Salary Admin Plan (Description)
Job Code
Job Title
Home Department Number
Home Department Name
Budget Entity Code
VP Org Code
College/Area
Division
Employee Class
Job FTE
Job Standard Hours
Hourly Rate
OPS Shift Differential
Biweekly Rate
Annual Rate
Home Department Number
Supervisor ID
Supervisor Name
GL Type (P=Primary)
Funding Dept / Proj Number
Funding Dept / Proj Percent

**NOTE:** PeopleSoft allows more than ten Funding Departments and/or projects for payroll distribution. The report will display up to ten Funding Department fields with a corresponding percent distribution for each.