



# 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 of the University of Central Florida website. 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 myUCF logo is visible on the left, and the navigation menu includes: myUCF | Home | Worklist | Add to Favorites | Sign out. A Help link is also present in the bottom right corner.

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

? 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.

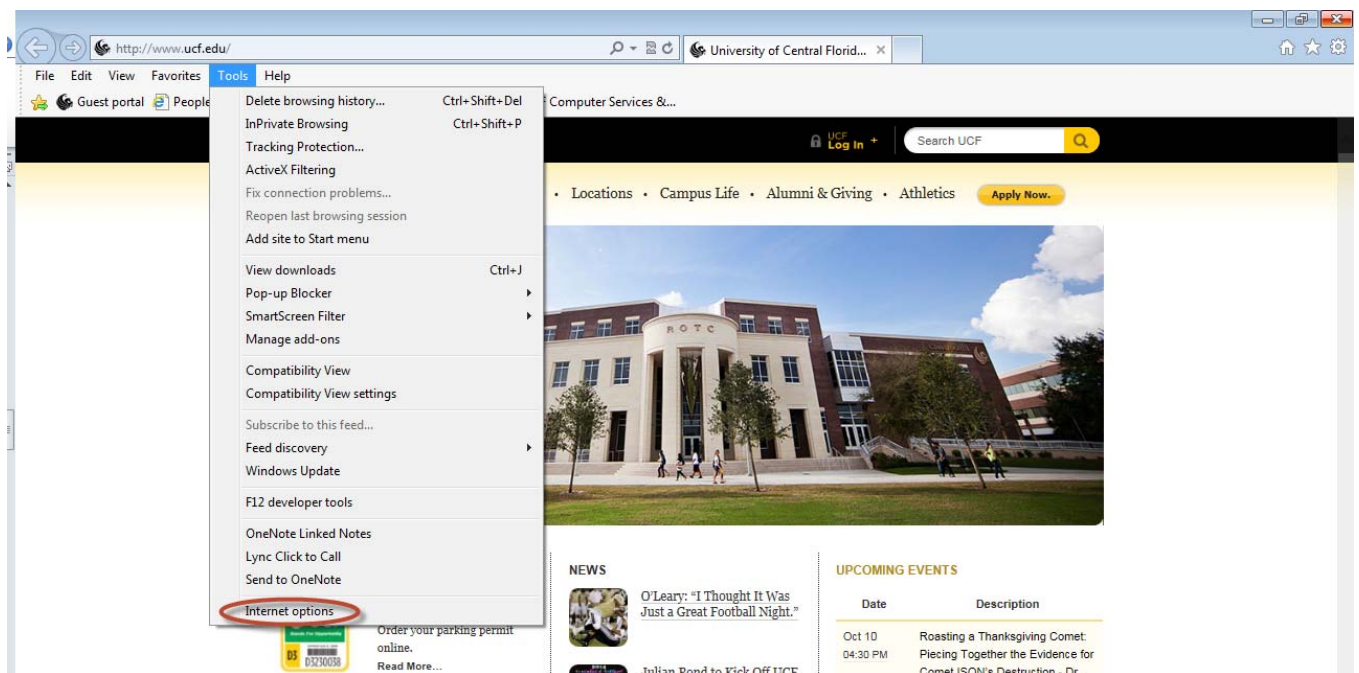
[http://ucf.custhelp.com/app/answers/detail/a\\_id/1415](http://ucf.custhelp.com/app/answers/detail/a_id/1415)

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

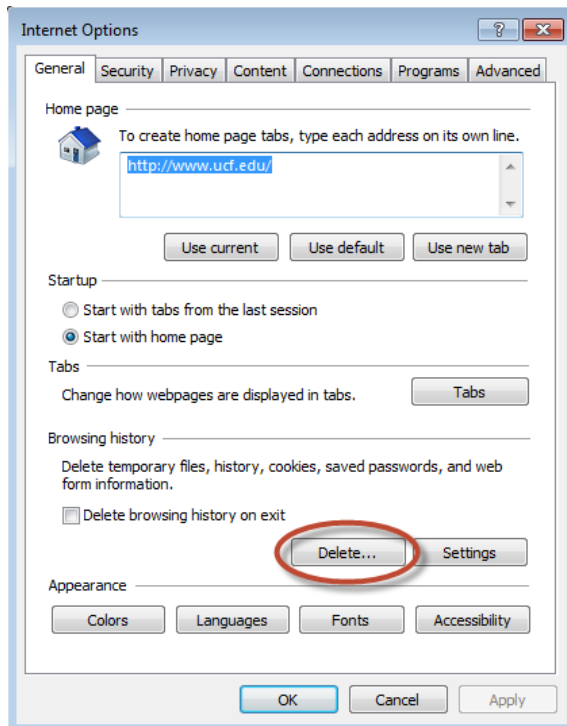
First, close all PeopleSoft windows, then follow this navigation:

Click on **Tools**

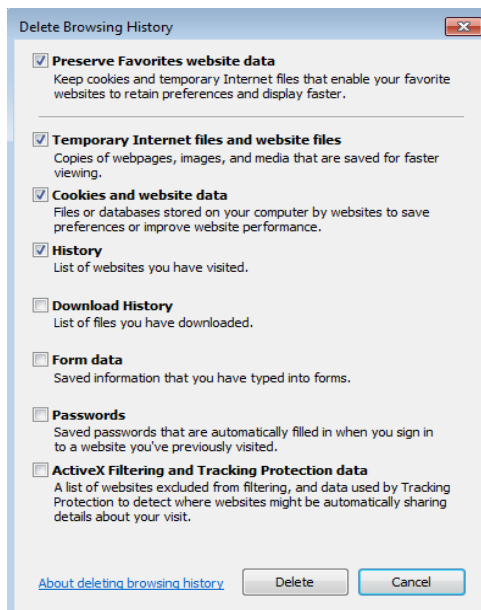
Click on **Internet Options**



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

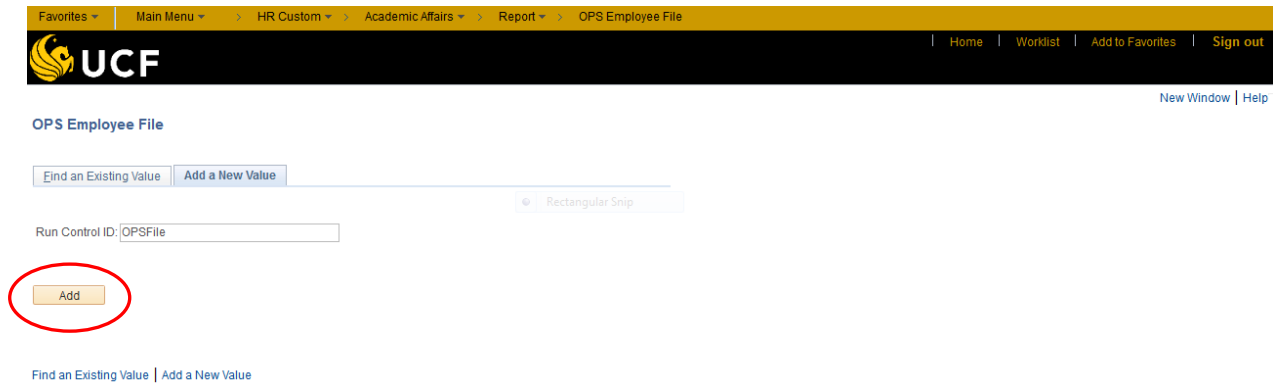
Search Advanced Search

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

Rectangular Snip

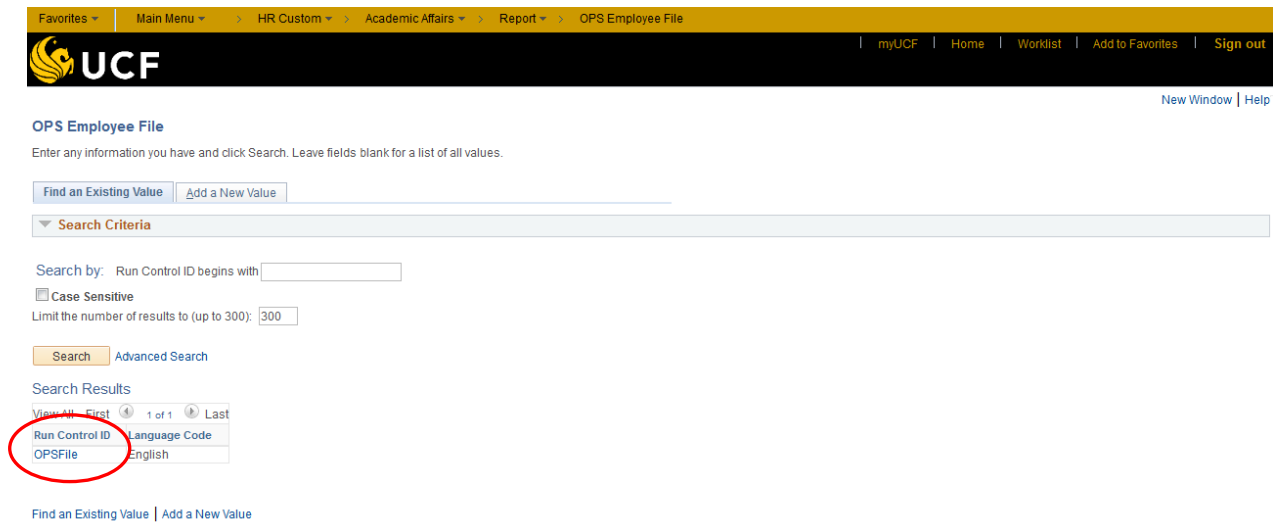
Run Control ID: OPSFile

**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 | <input type="radio"/> Hold Request                 |
| Location       | Server  | <input type="radio"/> Queue Request                |
| Server         | PSUNX   | <input type="radio"/> Cancel Request               |
| Recurrence     |         | <input checked="" type="checkbox"/> Delete Request |
|                |         | <input type="radio"/> Restart Request              |

**Date/Time** **Actions**

|                    |                           |                                |          |
|--------------------|---------------------------|--------------------------------|----------|
| Request Created On | 04/17/2015 10:25:54AM EDT | <a href="#">Parameters</a>     | Transfer |
| Run Anytime After  | 04/17/2015 10:17:46AM EDT | <a href="#">Message Log</a>    |          |
| Began Process At   | 04/17/2015 10:25:59AM EDT | <a href="#">Batch Timings</a>  |          |
| Ended Process At   | 04/17/2015 10:27:17AM EDT | <a href="#">View Log/Trace</a> |          |

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   | <a href="#">Message Log</a> |
| 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.

|   | I              | J                  | K          | L         | M          | N         | O        | P          | Q        | R          | S         | T      | U         | V        |
|---|----------------|--------------------|------------|-----------|------------|-----------|----------|------------|----------|------------|-----------|--------|-----------|----------|
|   | Last Name      |                    |            |           |            |           |          |            |          |            |           |        |           |          |
| 1 | Highest Degree | Degree Description | Princ Plac | Hire Date | Salary Adr | Sal Adm P | Job Code | Job Title  | Home Deg | Home Deg   | Budget En | VP Org | College/A | Division |
| 2 | BA             | Bachelor of        | MAIN       | #####     | 00         | OPS Hourl | 011      | Clerk      | 09100001 | LIB-OPER/  | E&G       | 5TL000 | AA-ITR-LI | ACADEMIC |
| 3 | MPA            | Master of          | MAIN       | #####     | 06         | OPS AdjF  | 9004A    | Instructor | 18652001 | CJ-PAYRO   | E&G       | 560000 | AA-COLLE  | ACADEMIC |
| 4 | MA             | Master of          | MAIN       | 1/2/2008  | 06         | OPS AdjF  | 9166A    | Research   | 24032001 | BIO SCI-P/ | E&G       | 5C0000 | AA-COLLE  | ACADEMIC |
| 5 | BA             | Bachelor of        | MAIN       | #####     | 00         | OPS Hourl | 064      | Registere  | 03420301 | CL HLTH-A  | AUX       | 550000 | AA-STUDE  | ACADEMIC |
| 6 | BA             | Bachelor of        | MAIN       | 7/6/2010  | 00         | OPS Hourl | 011      | Clerk      | 23222001 | HIST-PAYF  | E&G       | 580000 | AA-COLLE  | ACADEMIC |
| 7 | PHD            | Doctor of          | MAIN       | 1/9/2012  | 06         | OPS AdjF  | 9004A    | Instructor | 18652001 | CJ-PAYRO   | E&G       | 560000 | AA-COLLE  | ACADEMIC |
| 8 | EDD            | Doctor of          | MAIN       | #####     | 01         | Dual Com  | 9004X    | Instructor | 23262001 | WRITING    | E&G       | 580000 | AA-COLLE  | ACADEMIC |
| 9 |                |                    | MAIN       | #####     | 00         | OPS Hourl | 011      | Clerk      | 23142001 | WUCF PA/   | E&G       | 580000 | AA-COLLE  | ACADEMIC |

**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.