



Procedure Manual

HOW TO ACCESS THE FACULTY & STAFF POSITION FILE

Table of Contents

Introduction to PeopleSoft	3
<i>Signing on to PeopleSoft.....</i>	<i>3</i>
Clearing the Cache.....	5
<i>Steps for Clearing the Cache.....</i>	<i>5</i>
Running the Faculty/Staff Position File.....	7
<i>What is the Faculty/Staff Position File?</i>	<i>7</i>
<i>Running the File</i>	<i>7</i>
<i>The Process Scheduler Request Page.....</i>	<i>9</i>
Viewing the Faculty/Staff Position File.....	10

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

UCF SIGN IN + Search UCF

UCF Federated Identity

Account

Username: NID or DTC-Atlas ID

Password

Password

Sign On

my.ucf.edu

You have asked to login to my.ucf.edu

Look up your UCF NID username. ⓘ

Reset your account password. ⓘ

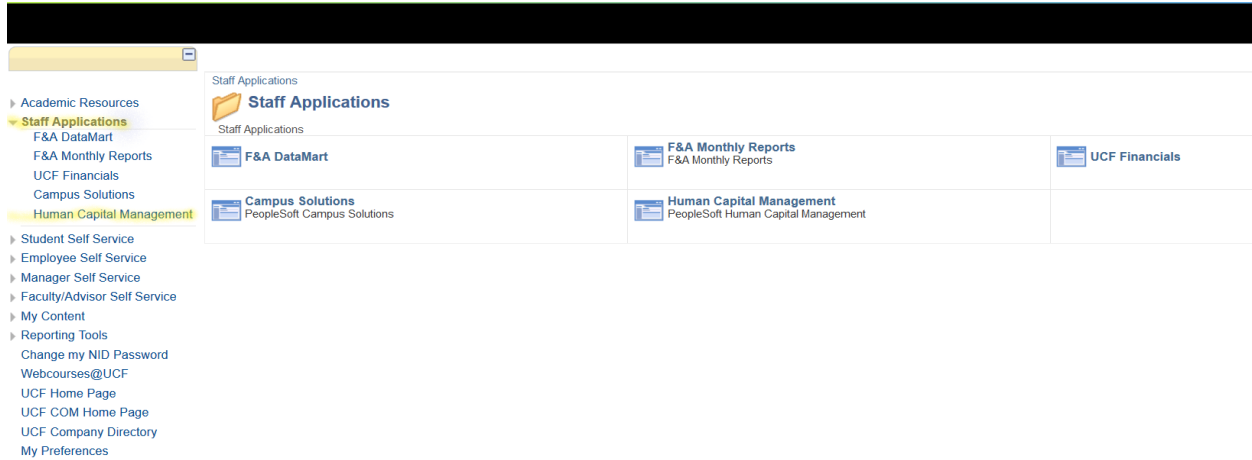
Trouble Signing On? ⓘ

By signing on, you agree to the terms of the
UCF Policies & Procedures

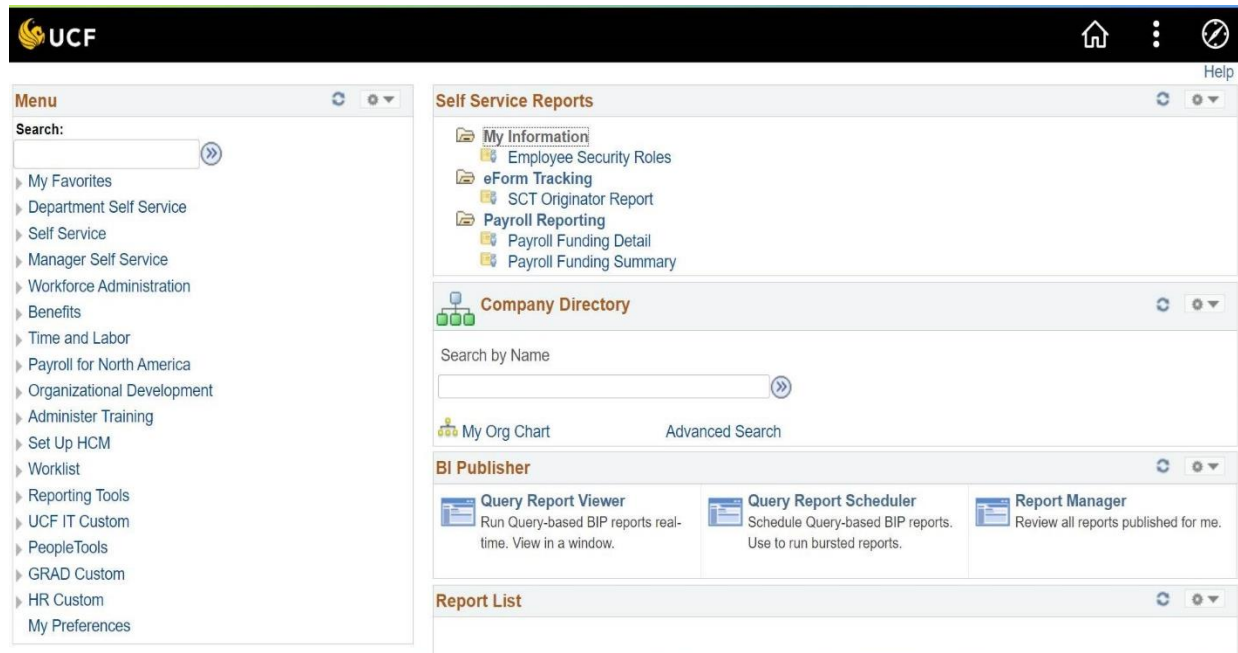
UCF UNIVERSITY OF CENTRAL FLORIDA

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

The following window will appear:



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



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 Faculty/Staff Position 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.

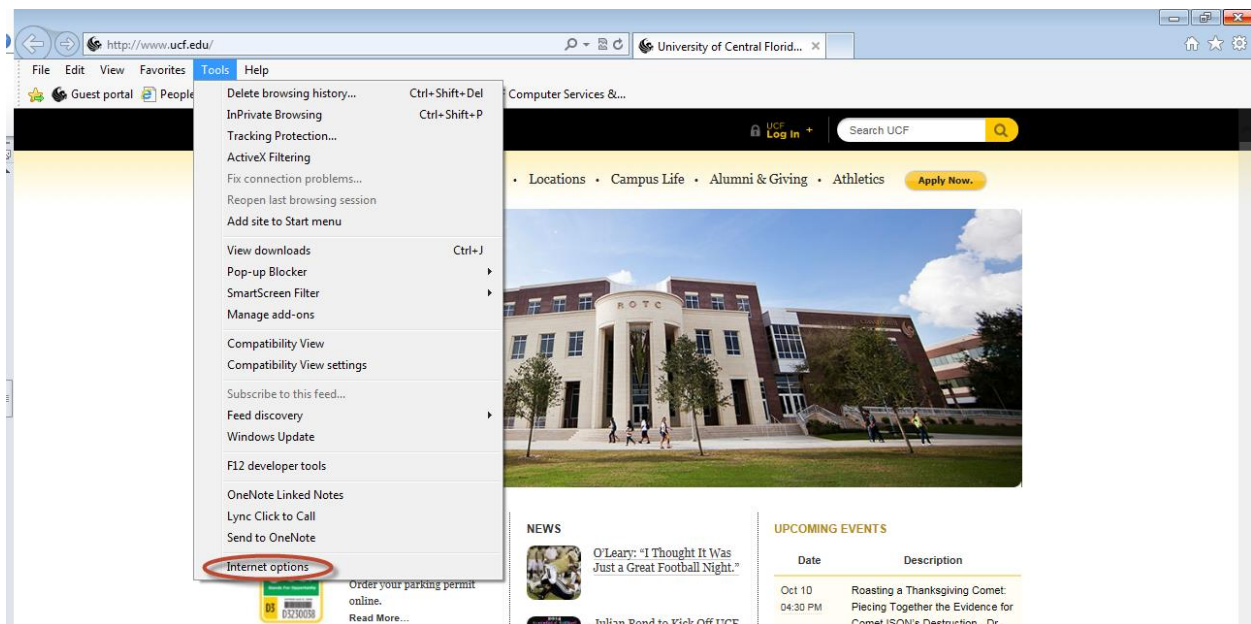
http://ucf.custhelp.com/app/answers/detail/a_id/1415

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

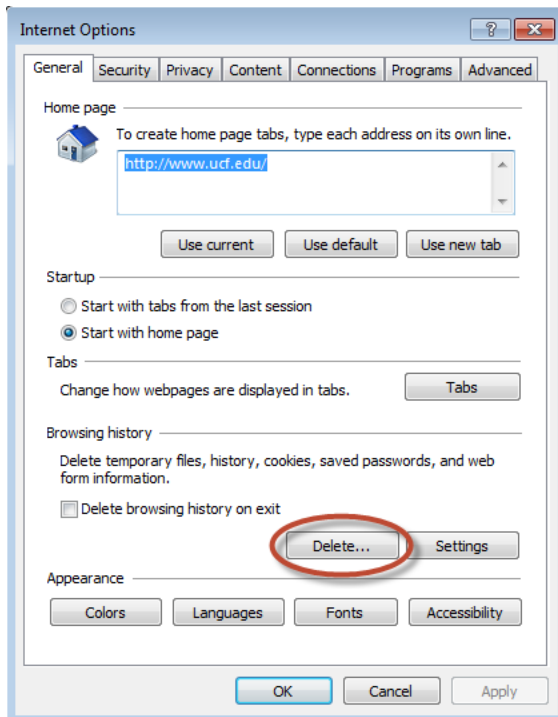
First, close all PeopleSoft windows, then follow this navigation:

Click on **Tools**

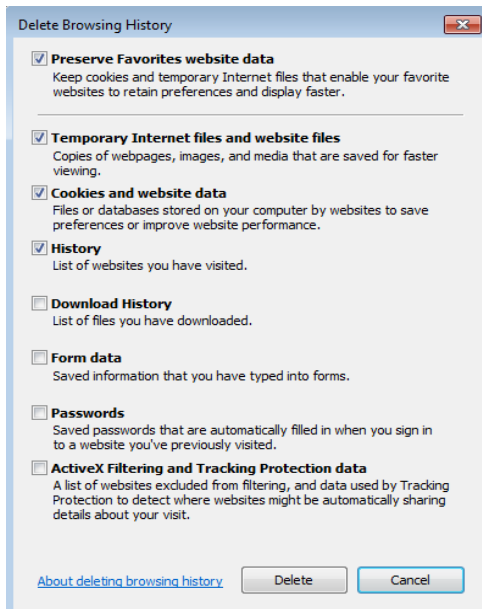
Click on **Internet Options**



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 Signing on to PeopleSoft again.

Running the Faculty/Staff Position File

What is the Faculty/Staff Position File?

The “Faculty/Staff Position File” is a report that lists all vacant and/or filled Administrative & Professional (A&P), Faculty, and University Support Personnel System (USPS) positions by area/college.

Running the File

Navigation:

Main Menu > HR Custom > Academic Affairs > Report > Faculty/Staff Position File

The following window will appear:

Faculty/Staff Position File

Faculty/Staff Position 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

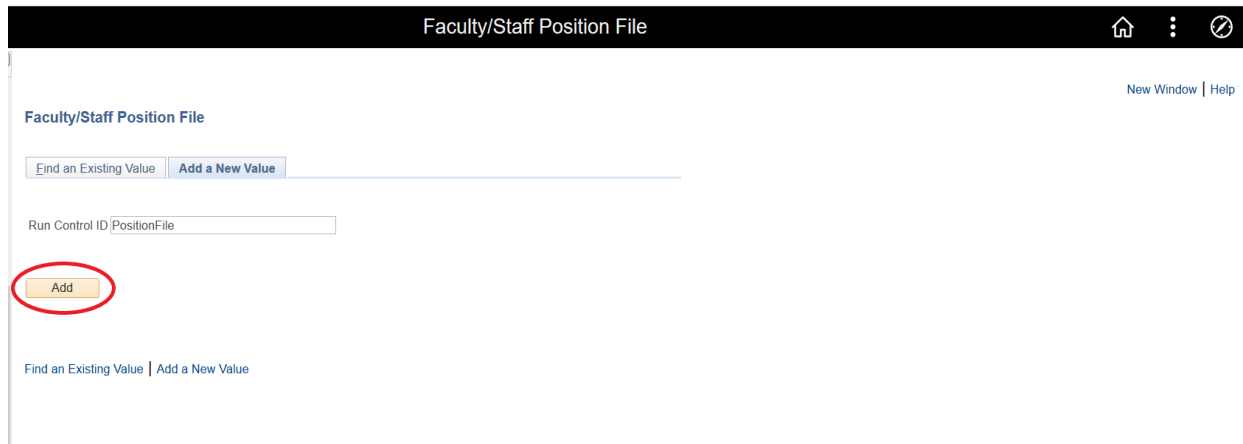
Search Advanced Search

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.

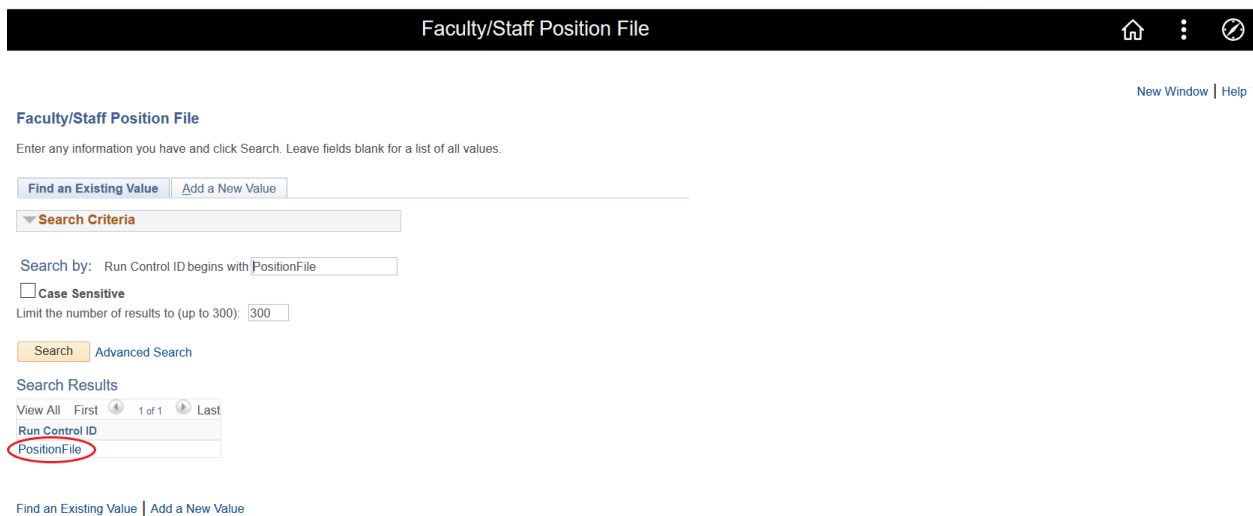
Click on ‘Add a New Value’ and enter a name that best meets your needs. In this example, the run control could be named ‘PositionFile.’ Do not use special characters or spaces in the name. Only letters, numbers, and the underscore character should be used.



The screenshot shows the 'Faculty/Staff Position File' interface. At the top, there is a header bar with the title 'Faculty/Staff Position File' and navigation icons. Below the header, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. A text input field contains the value 'PositionFile'. Below the input field, there is a yellow 'Add' button, which is circled in red. At the bottom of the form, there are links for 'Find an Existing Value' and '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.



The screenshot shows the 'Faculty/Staff Position File' interface after a search. The header bar is the same. Below the header, there is a message: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these buttons, there is a 'Search Criteria' dropdown menu. The search criteria are: 'Search by: Run Control ID begins with PositionFile', 'Case Sensitive' checkbox is unchecked, and 'Limit the number of results to (up to 300): 300'. There are two buttons: 'Search' and 'Advanced Search'. Below the search buttons, there is a 'Search Results' section. It shows 'View All First 1 of 1 Last'. The search results table has one row with the value 'PositionFile' in the 'Run Control ID' column, which is circled in red. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

The following page will appear:

Populate Run Control Page

Faculty/Staff Position File

Run Control ID PositionFile Report Manager Process Monitor **Run**

Program: CFPY2344.SQR

Purpose: Creates a file of currently filled and/or vacant Faculty and Staff positions.

Select File Type:

Filled Positions

Vacant Positions

All Positions

Save Notify Add Update/Display

Select the type of file desired from Filled, Vacant or All Positions under “Select File Type”. 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.

Faculty/Staff Position File

Process Scheduler Request

User ID annjohns Run Control ID PositionFile

Server Name **PSUNX** Run Date 05/11/2021

Recurrence Run Time 3:40:22PM Reset to Current Date/Time

Time Zone FTP Control Command

Select	Description	Process Name	Process Type	*Type	Format	Distribution
<input checked="" type="checkbox"/>	Faculty/Staff Position File	CFPY2344	SQR Report	Web	CSV	Distribution

OK Cancel

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

The following page will appear:

Viewing the Faculty/Staff Position File

Faculty/Staff Position File

Run Control ID PositionFile Report Manager Process Monitor Run

Process Instance: 11727529 Process Instance Number

Program: CFPY2344.SQR

Purpose: Creates a file of currently filled and/or vacant Faculty and Staff positions.

Select File Type:

- Filled Positions
- Vacant Positions
- All Positions

Save Notify Add Update/Display

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 Monitor

Process List Server List

View Process Request For

User ID annjohns Type Last 100 Days Refresh Refresh Button

Server Name Instance From Instance To Report Manager

Run Status Distribution Status Save On Refresh

Run Status Column

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11727529		SQR Report	CFPY2344	annjohns	05/11/2021 3:40:22PM EDT	Success	Posted	Details

Click on the **Refresh** button. The Faculty/Staff Position File (CFPY2344) 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 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.

The screenshot shows the Process Monitor interface. On the left is a navigation menu with categories like Administer Training, Workforce Monitoring, and HR Custom. The main area displays 'Process Detail' for Instance 11727529, Name CFPY2344, Type SQR Report, and Description Faculty/Staff Position File. The Run Status is 'Success' and Distribution Status is 'Posted'. Below this, there are sections for 'Run' (with Run Control ID, Location, Server, and Recurrence), 'Date/Time' (with Request Created On, Run Anytime After, Began Process At, and Ended Process At), and 'Actions' (with Hold Request, Queue Request, Cancel Request, Delete Request, Re-send Content, Restart Request, Parameters, Transfer, Message Log, and Batch Timings). The 'View Log/Trace' link is circled in red.

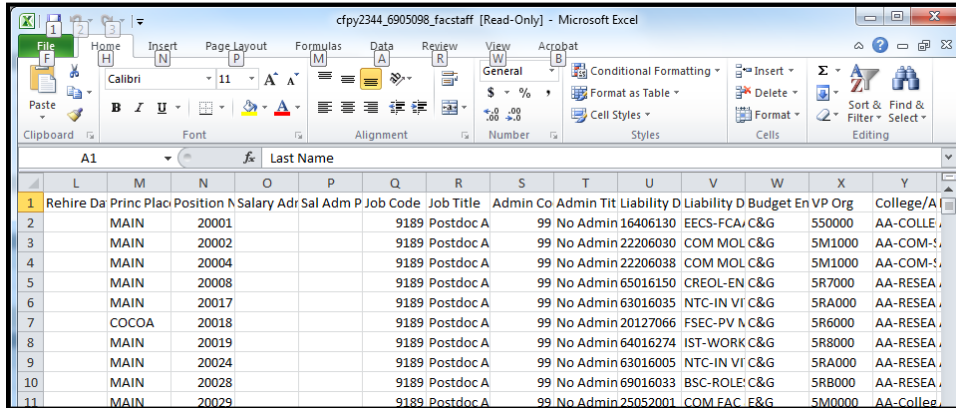
On the View Log/Trace page, click on the hyperlink with the report name and “.CSV.”

The screenshot shows the View Log/Trace page. The Report section displays Report ID 5802770, Process Instance 11727529, Name CFPY2344, Process Type SQR Report, and Run Status Success. Below this is the Distribution Details section with Distribution Node reporthew and Expiration Date 06/25/2021. The File List table shows the following files:

Name	File Size (bytes)	Datetime Created
SQR_CFPY2344_11727529.log	2,090	05/11/2021 3:51:03:541404PM EDT
cfpy2344_11727529.out	2,031	05/11/2021 3:51:03:541404PM EDT
cfpy2344_11727529_facstaff.csv	3,990,778	05/11/2021 3:51:03:541404PM EDT

The file cpy2344_11727529_facstaff.csv is highlighted with a red arrow. Below the File List is the Distribute To section with Distribution ID Type and User annjohns.

The report will open in Excel.



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
Ethnic Group
Gender
Birth Year
Highest Degree
Highest Degree Description
Date of Hire (UCF)
Date of Hire (State)
Rehire Date
Principal Place of Employment
Position Number
Salary Admin Plan (Code)
Salary Admin Plan (Description)
Job Code
Job Code Title
Position Title
Administrative Code
Administrative Title
FLSA Status
Liability Dept/Proj Nbr
Liability Dept/Proj Name
Budget Entity Code
VP Org Code
College/Area
Division
Employee Class
Tenure Status

Tenure Date
CIP Code
CIP Description
Authorized FTE
Budgeted Week
Position Salary
Position Temporary Pay
Position Shift Differential
Position Add Pay
Position Total Pay
Annual Rate
Position Biweekly
Job Standard Hours
Home Department Number
Union Code
Reports to (Position Number)
Reports to (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.