



# **Procedure Manual**

## **HOW TO ACCESS THE FACULTY & STAFF POSITION 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:

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.

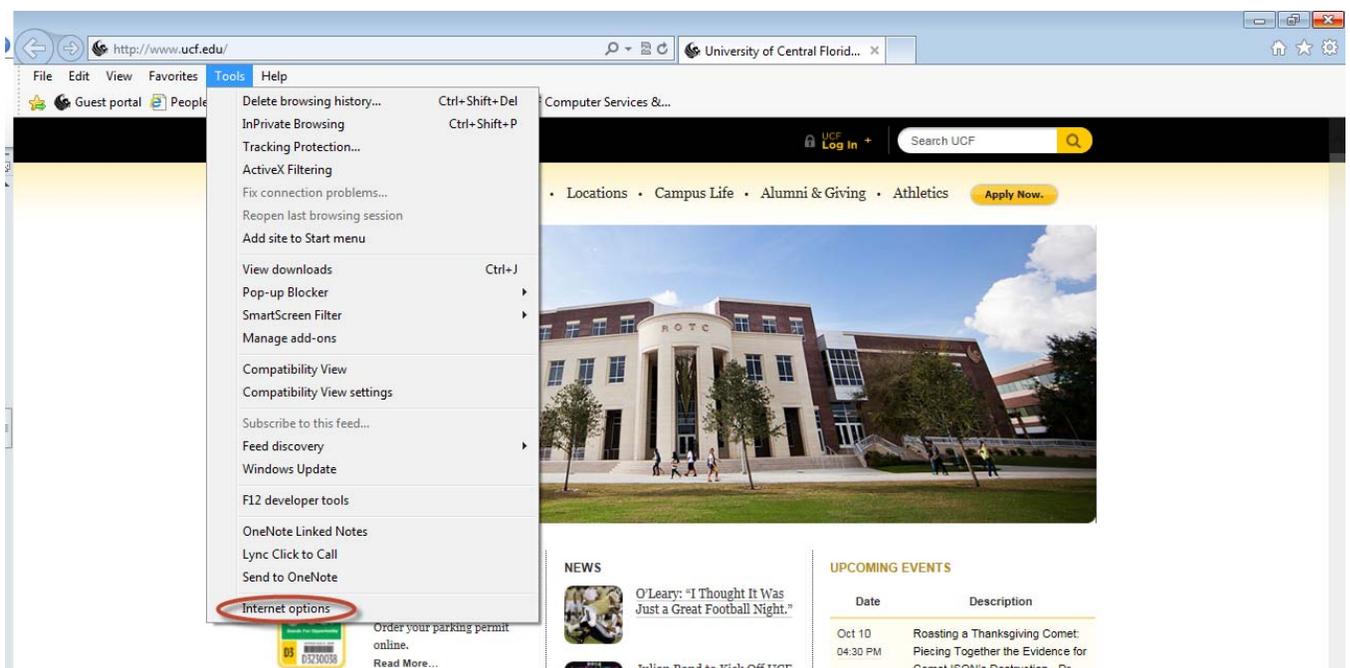
[http://ucf.custhelp.com/app/answers/detail/a\\_id/1415](http://ucf.custhelp.com/app/answers/detail/a_id/1415)

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

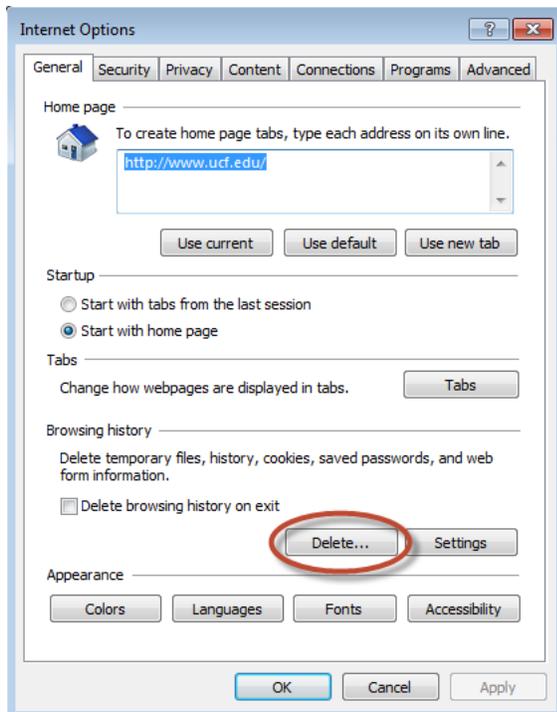
First, close all PeopleSoft windows, then follow this navigation:

Click on **Tools**

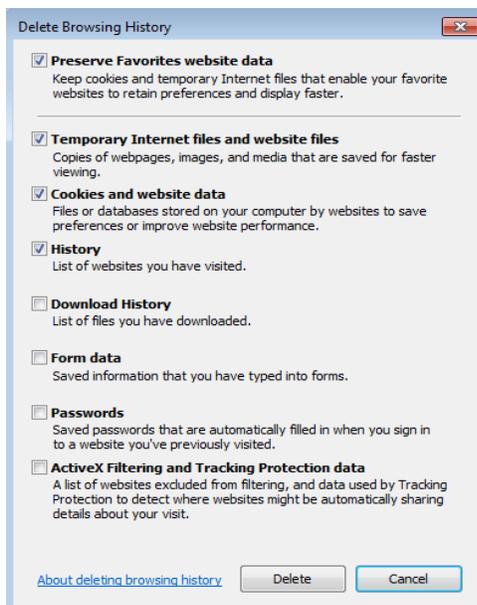
Click on **Internet Options**



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:

The screenshot displays the 'Faculty/Staff Position File' report interface. At the top, there is a navigation breadcrumb: 'Main Menu > HR Custom > Academic Affairs > Report > Faculty/Staff Position File'. Below this is the UCF logo and navigation links: 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The main heading is 'Faculty/Staff Position File' with a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search criteria section with a 'Search by' field set to 'Run Control ID begins with'. There are two 'Add a New Value' buttons circled in red, one at the top and one at the bottom, with a red arrow pointing from the top one to the bottom one. The interface also includes a 'Search' button and an 'Advanced Search' link.

### 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.

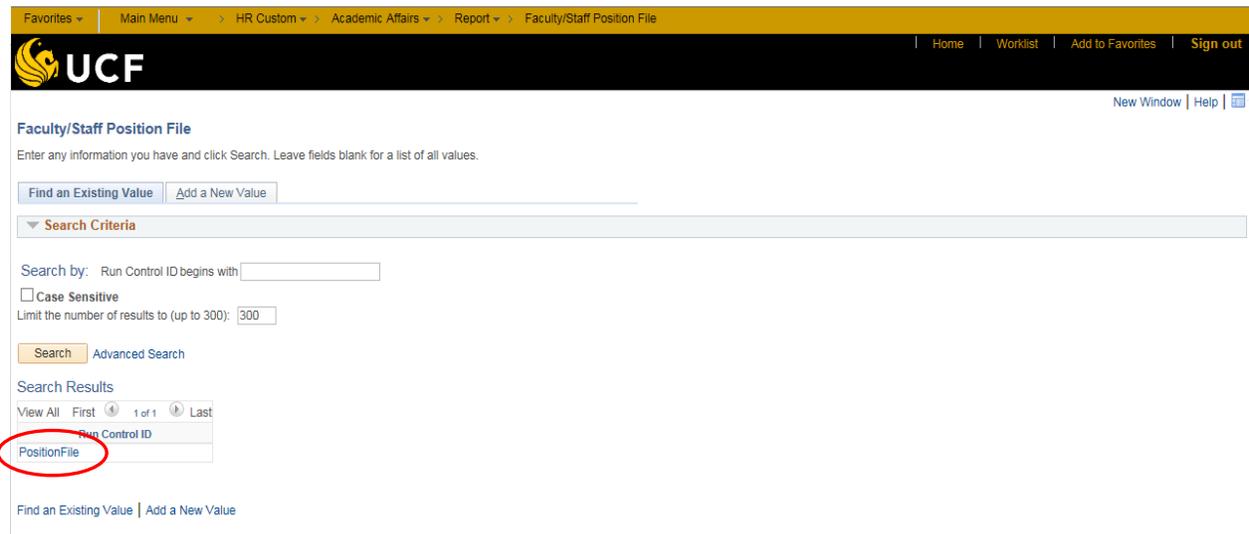
Click on ‘Add a New Value’ and enter a name that best meets your needs. In this example, the run control could be named ‘PositionFile.’ Do not use special characters or spaces in the name. Only letters, numbers, and the underscore character should be used.



The screenshot shows the top navigation bar with 'Faculty/Staff Position File' selected. Below the UCF logo, there are buttons for 'Find an Existing Value' and 'Add a New Value'. A text input field contains 'PositionFile'. Below the input field, the 'Add' button is circled in red. At the bottom of the form area, 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 search results page. The 'Search Criteria' section is expanded, showing 'Search by: Run Control ID begins with' with an empty input field. There are checkboxes for 'Case Sensitive' and a limit of 300 results. A 'Search' button is present. Below the search results, a table shows one result: 'PositionFile', which is circled in red. The table has a header 'Run Control ID'.

The following page will appear:

## Populate Run Control Page

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    Return to Search    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.

Process Scheduler Request

User ID: pthomas      Run Control ID: PositionFile

Server Name: **PSUNX**      Run Date: 04/16/2015      **Reset to Current Date/Time**

Recurrence:      Run Time: 3:27:14PM

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	<b>CSV</b>	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

Click on link

Process Instance Number

Process Instance: 11113285

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 Return to Search 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

Refresh Button

Run Status Column

Report

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	11113285		SQR Report	CFPY2344	pthomas	04/16/2015 4:15:32PM EDT	Success	Posted	Details

Go back to Faculty/Staff Position File

Save Notify

Process List | Server List

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](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.

The screenshot shows the 'Process Detail' page for process CFYPY2344. The process is in a 'Success' state with a 'Posted' distribution status. The 'Run' section shows control parameters like 'PositionFile' and 'Server PSUNX'. The 'Date/Time' section shows the process was created and ended on 04/16/2015. The 'Actions' section includes links for 'Parameters', 'Transfer', 'Message Log', 'Batch Timings', and 'View Log/Trace', with the latter being circled in red. There are 'OK' and 'Cancel' buttons at the bottom.

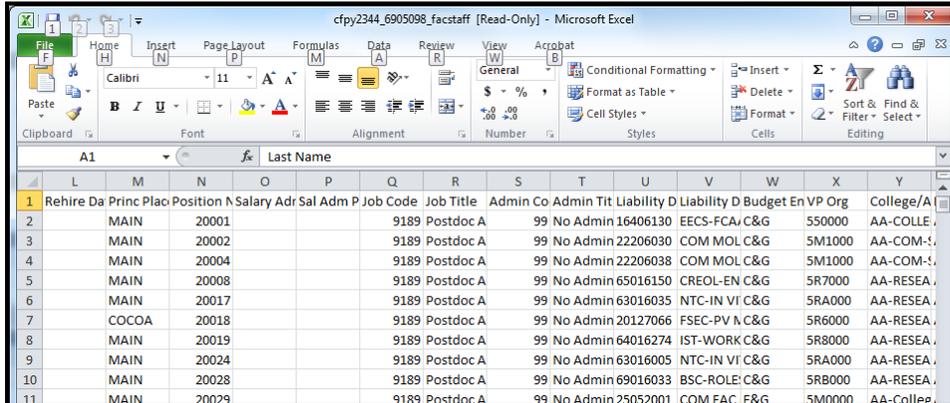
On the View Log/Trace page, click on the hyperlink with the report name and “.CSV.”

The screenshot shows the 'View Log/Trace' page for report CFYPY2344. It displays report details, distribution details (node: reportnode, expiration: 05/31/2015), and a file list. The file list has three columns: Name, File Size (bytes), and Datetime Created. A red arrow points to the file 'cfpy2344\_11113285\_facstaff.csv'. Below the file list is a 'Distribute To' section with a table for distribution ID type and user.

Name	File Size (bytes)	Datetime Created
SQR_CFPY2344_11113285.log	2,009	04/16/2015 4:17:22.555650PM EDT
cfpy2344_11113285.out	6,957	04/16/2015 4:17:22.555650PM EDT
cfpy2344_11113285_facstaff.csv		04/16/2015 4:17:22.555650PM EDT

Distribution ID Type	*Distribution ID
User	pthomas

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.