



Subject: SDSU POSITION/INCUMBENT REPORT PROCESS

Department: Budget & Finance

Date: March 2011

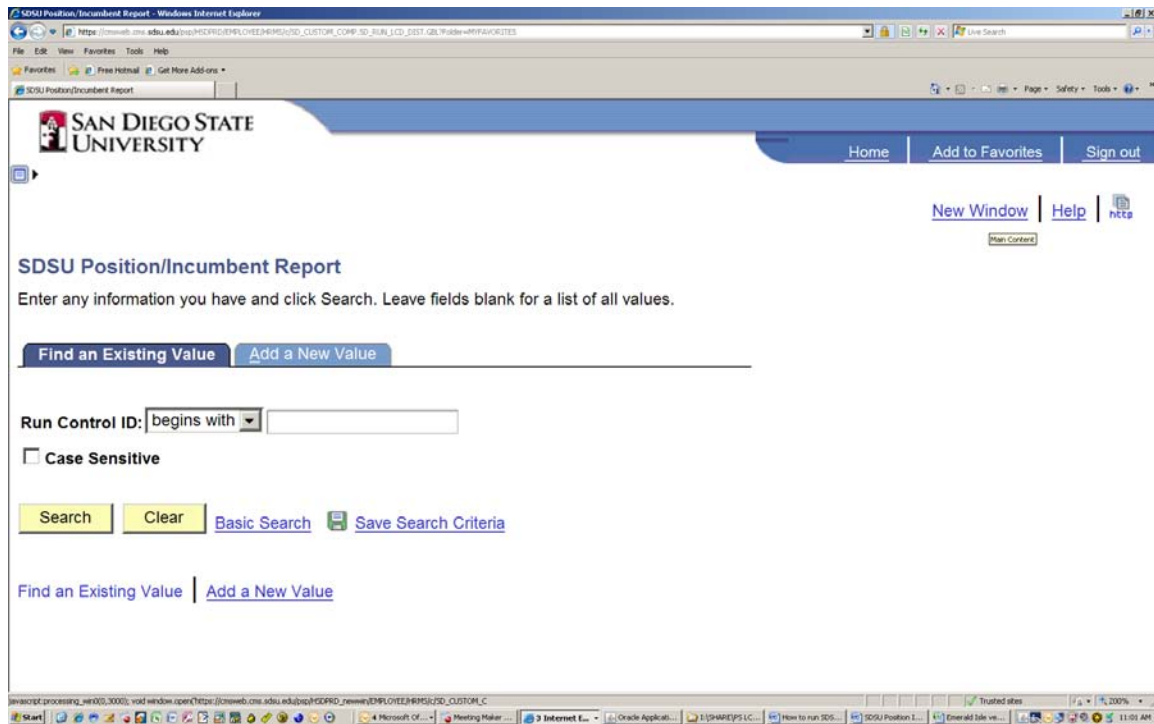
SDSU Position Incumbent Report:

The SDSU Position Incumbent Report is a tool available to departmental/divisional coordinators to assist in managing position data and position funding sources. Users must be granted access to run this report. If you do not currently have access, please complete and submit an [SDSU HCM Account Access Request form](#), requesting access to PM Reports under the Position Management responsibility.

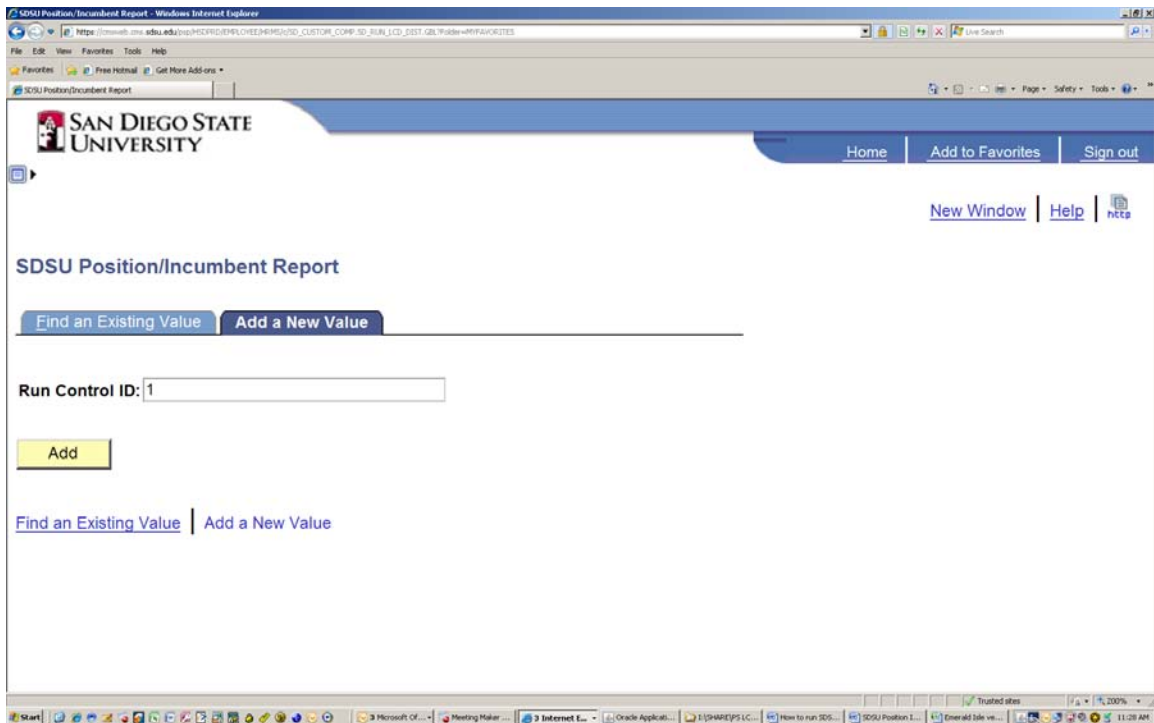
Instructions to Run Report:

Log on to PeopleSoft HCM and navigate as follows:

Main Menu > Organizational Development > Position Reports > SDSU Position/Incumbent Report

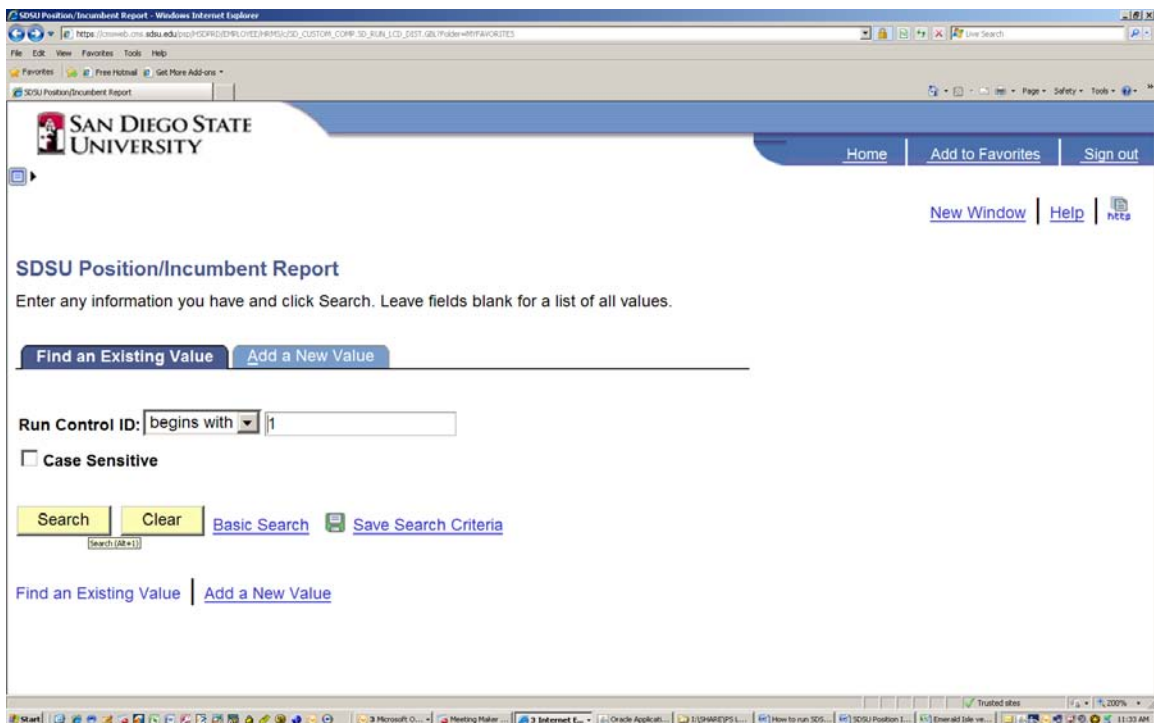


The first time you run the SDSU Position/Incumbent report, you will need to establish a Run Control ID. Select the **ADD A NEW VALUE** tab.

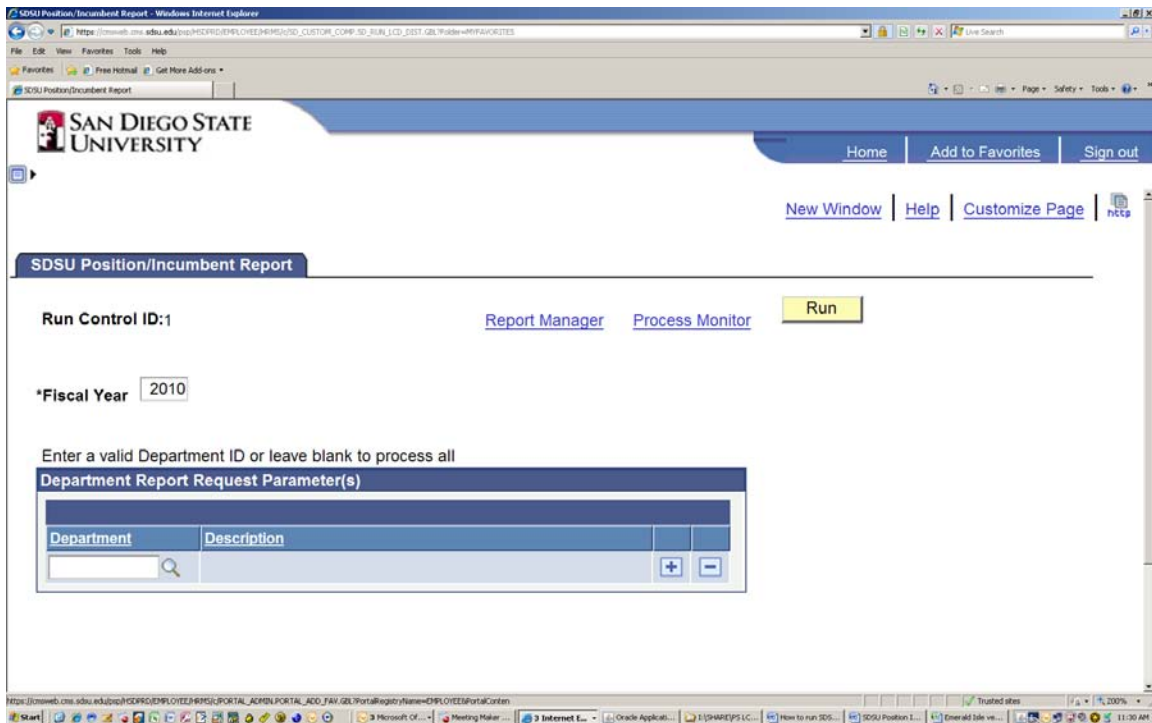


Type a value in the Run Control ID. It can be any value you choose. In the above example, the value “1” is used. Then select the yellow **ADD** button.

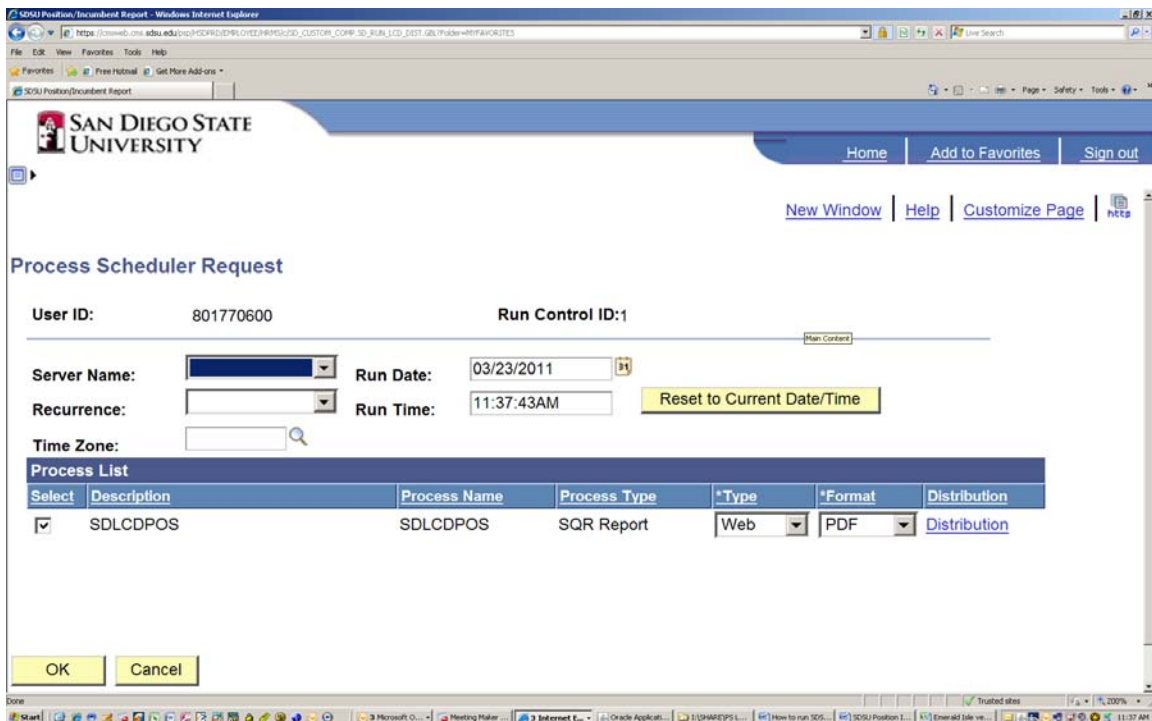
The next time you go to run the report, you will be able to enter the value you created in the Run Control ID and select the yellow **SEARCH** button.



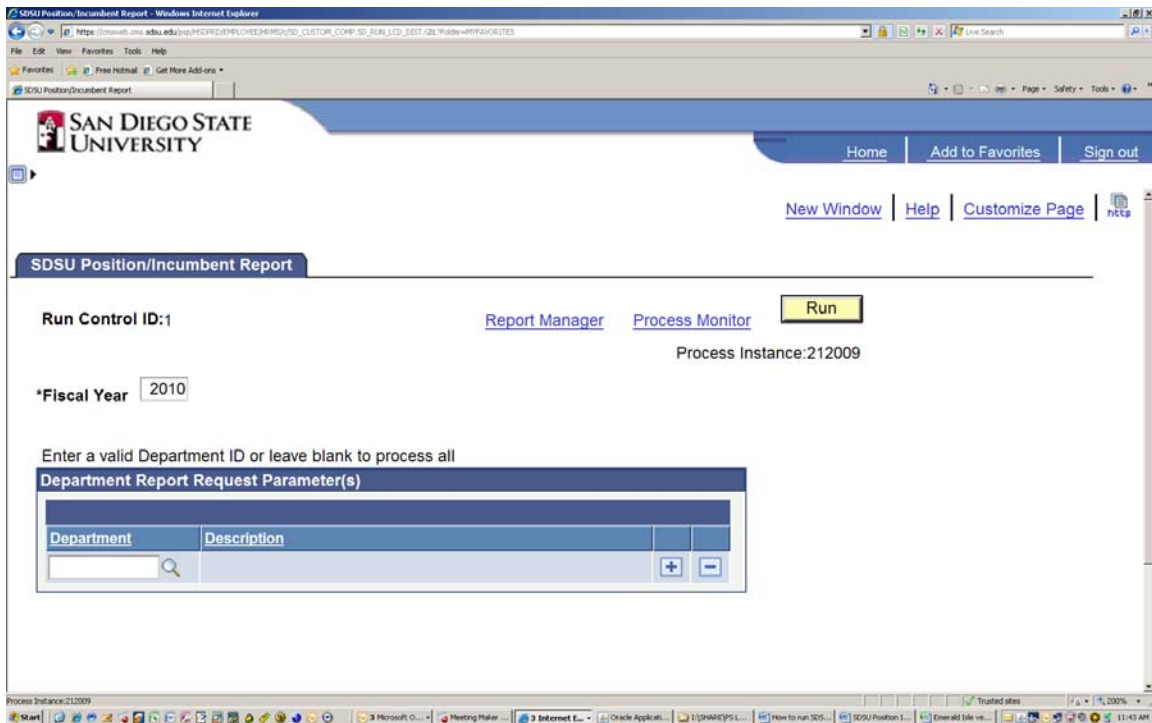
This action will take you to the Run Control menu.



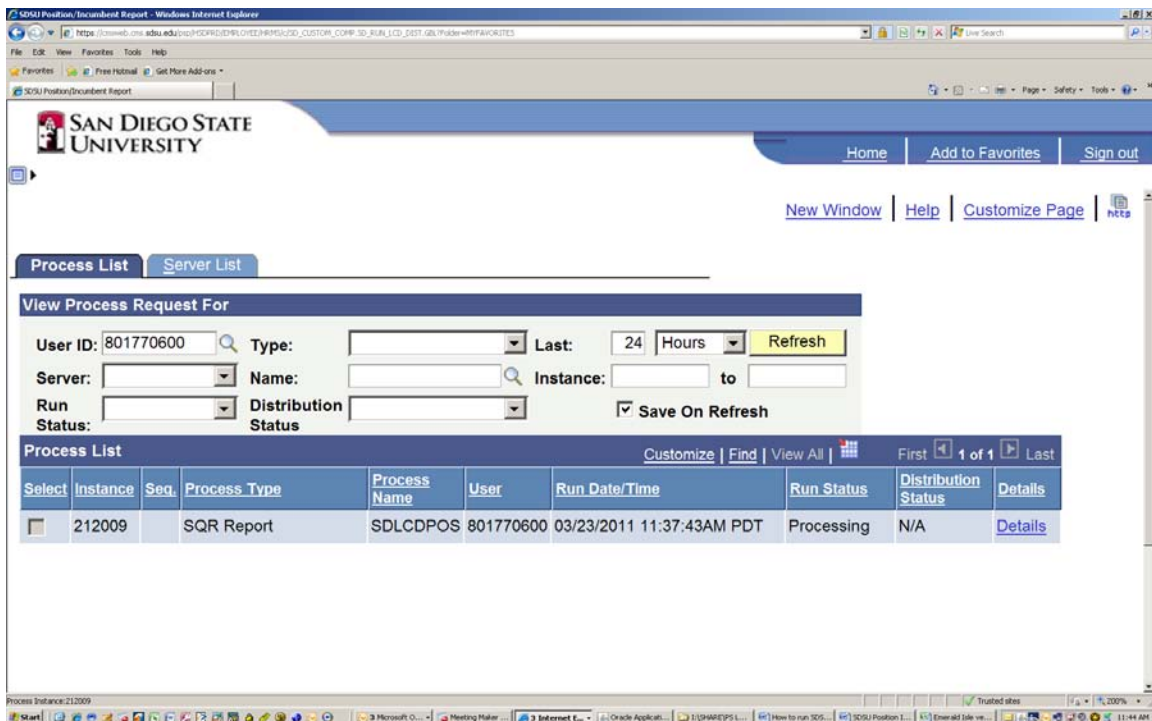
The fiscal year will generally default to the current fiscal year. All you need to do is enter a DEPARTMENT value or leave blank and the report will run for all DEPARTMENT values that you have security permission to access. Then select the yellow **RUN** button.



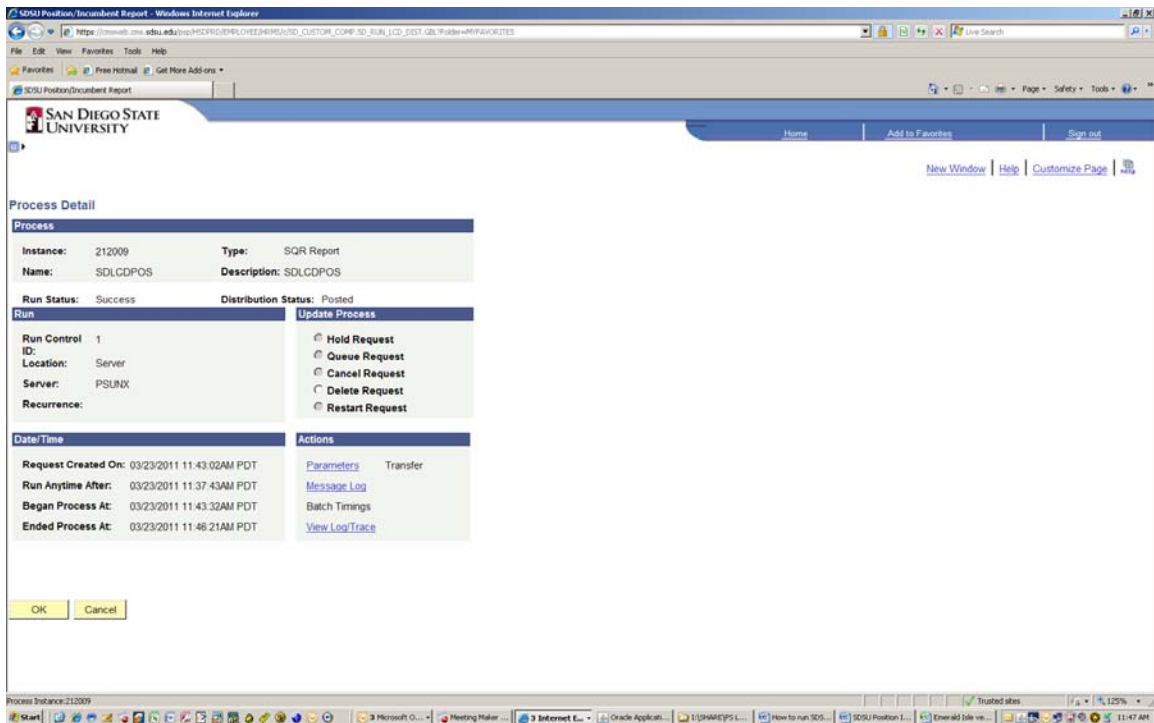
This action will take you to the Process Scheduler Request. Select the yellow **OK** button.



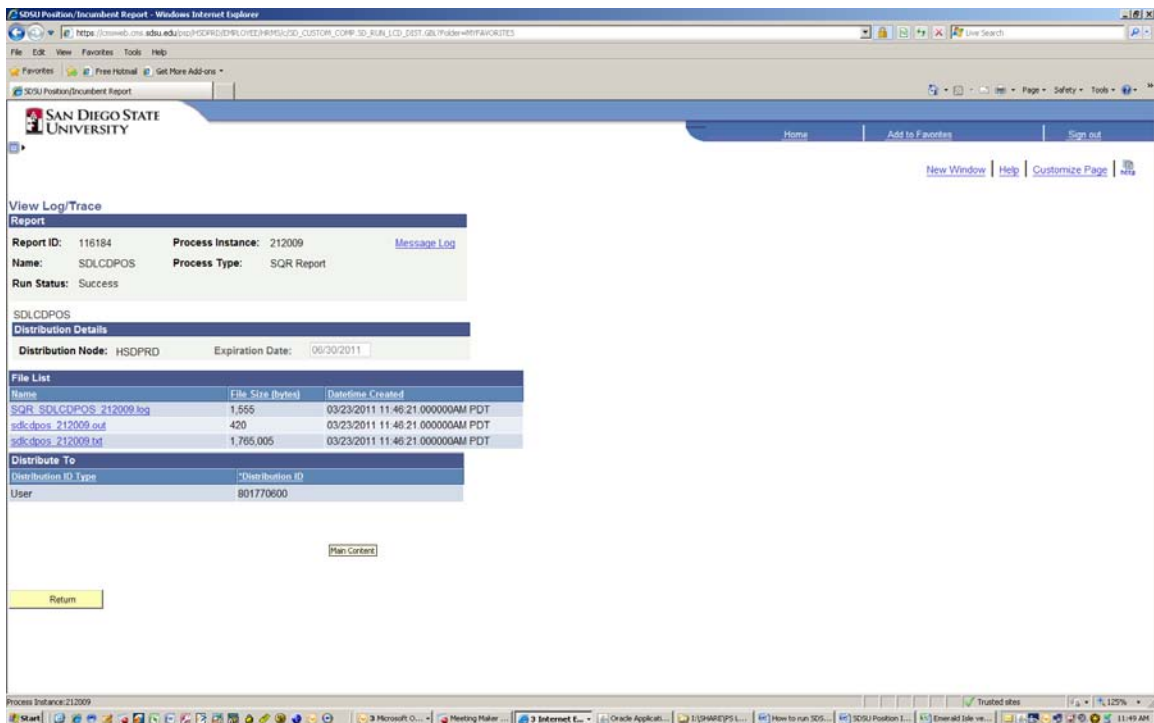
This action returns you to the Run Control menu and displays the process instance for the report under the yellow RUN button. Select the PROCESS MONITOR link to the left of the **RUN** button.



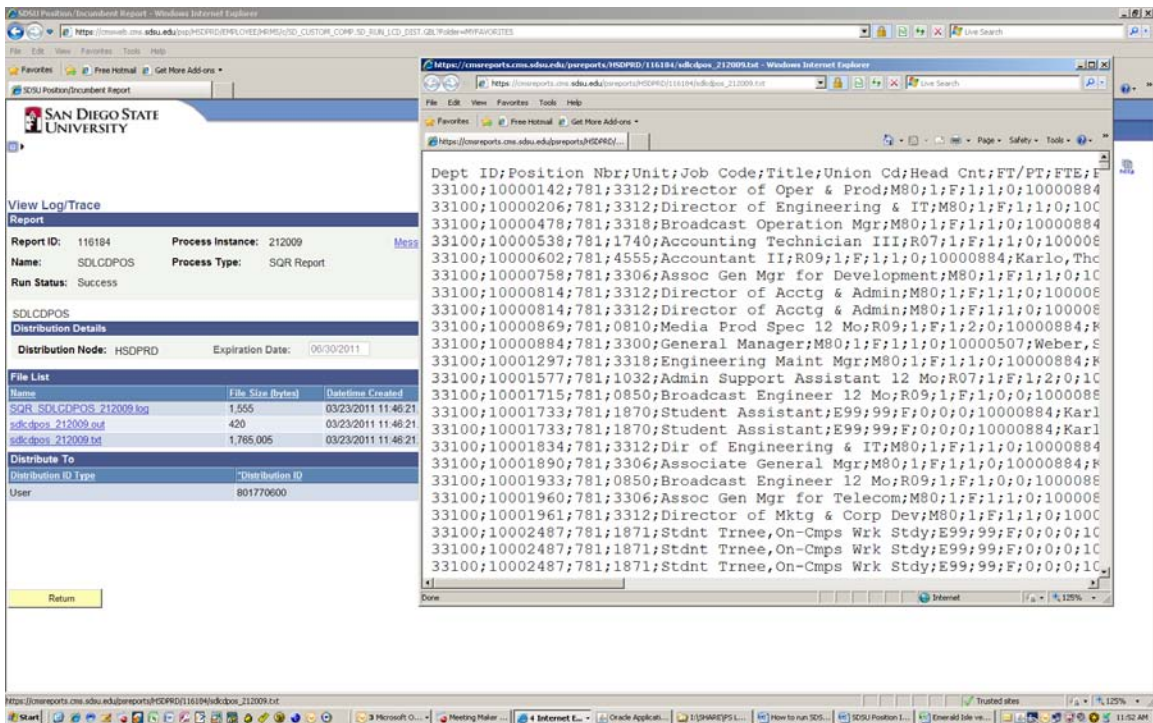
This action will take you to the Process Monitor. You will note that the RUN STATUS indicates that your process instance is PROCESSING. Select the yellow **REFRESH** button periodically until the RUN STATUS changes to SUCCESS and the DISTRIBUTION STATUS changes to POSTED. Then select on the **DETAILS** link.



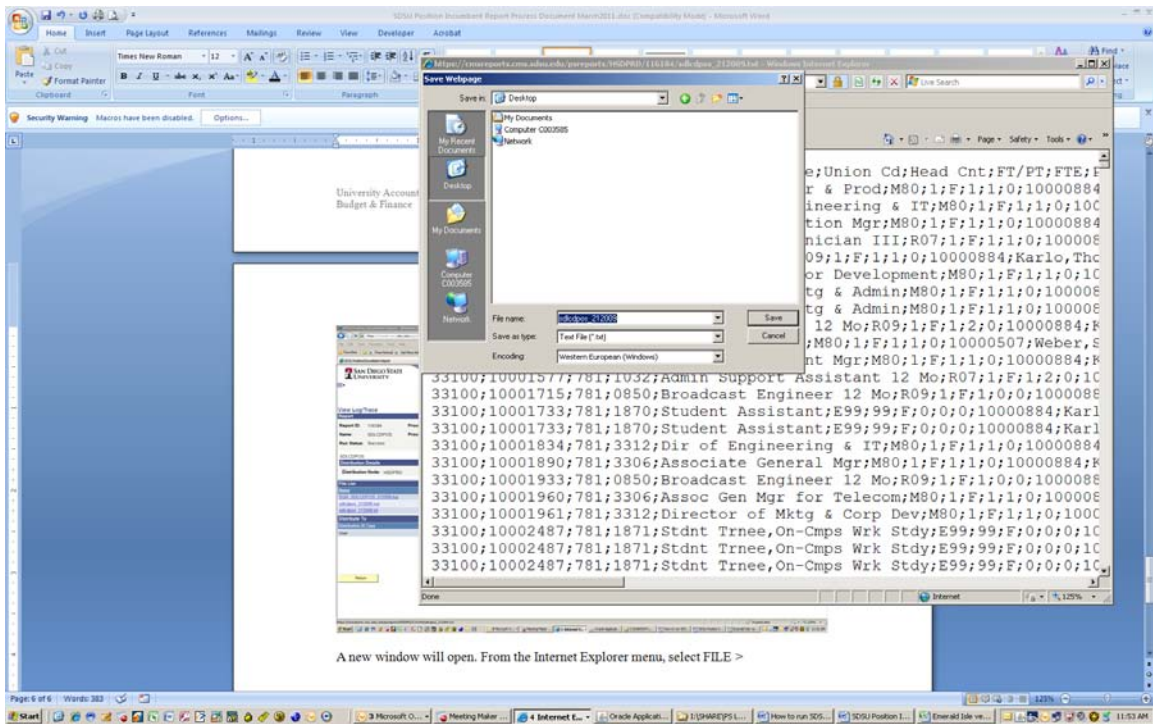
This action will take you to the Process Detail. Select the **VIEW LOG/TRACE** link.



This action will take you to the output files for your request. Select the **.txt** file link.



A new internet explorer window will open with your report in text format.

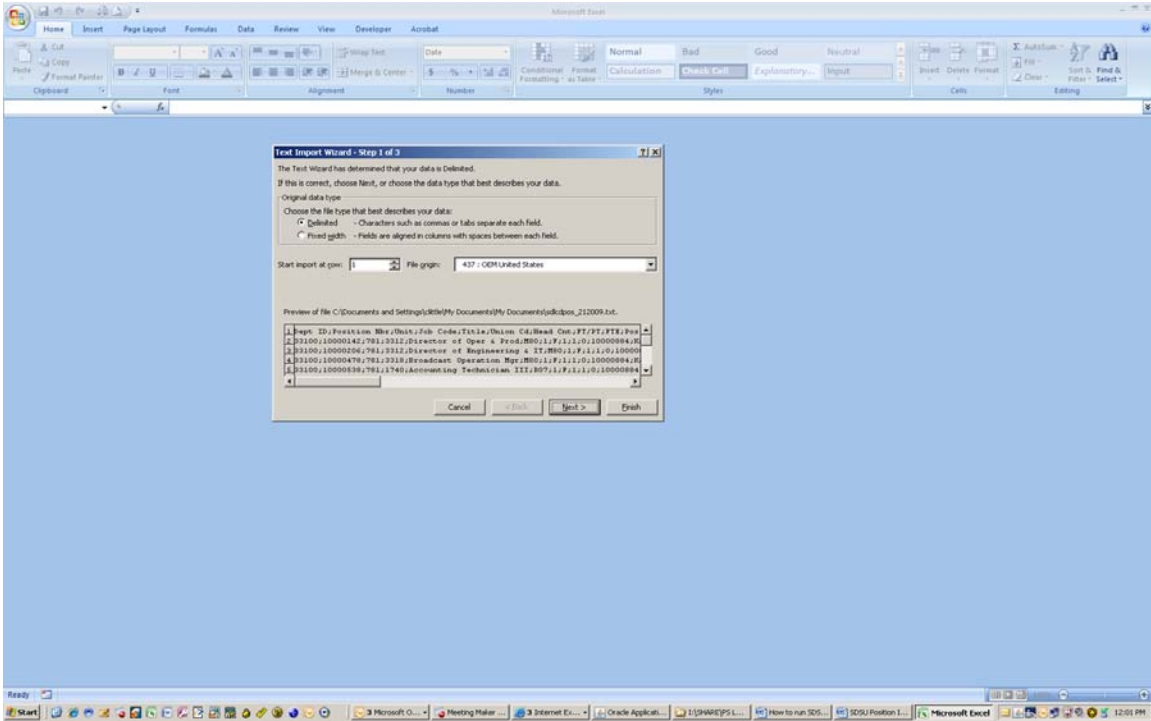


A new window will open. From the Internet Explorer menu, select FILE >

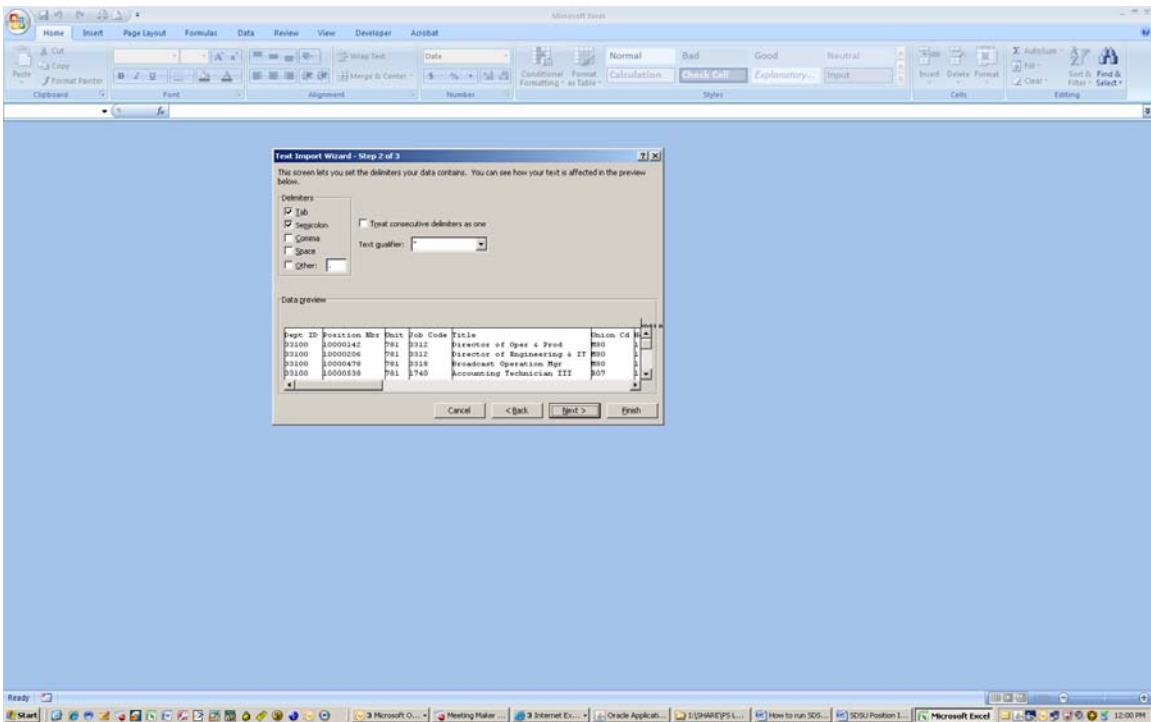
Select FILE > SAVE AS > and save the file as file type TEXT FILE to a location on your desktop where you can easily retrieve it.

Open Microsoft EXCEL and open the TEXT file you just saved to your desktop.

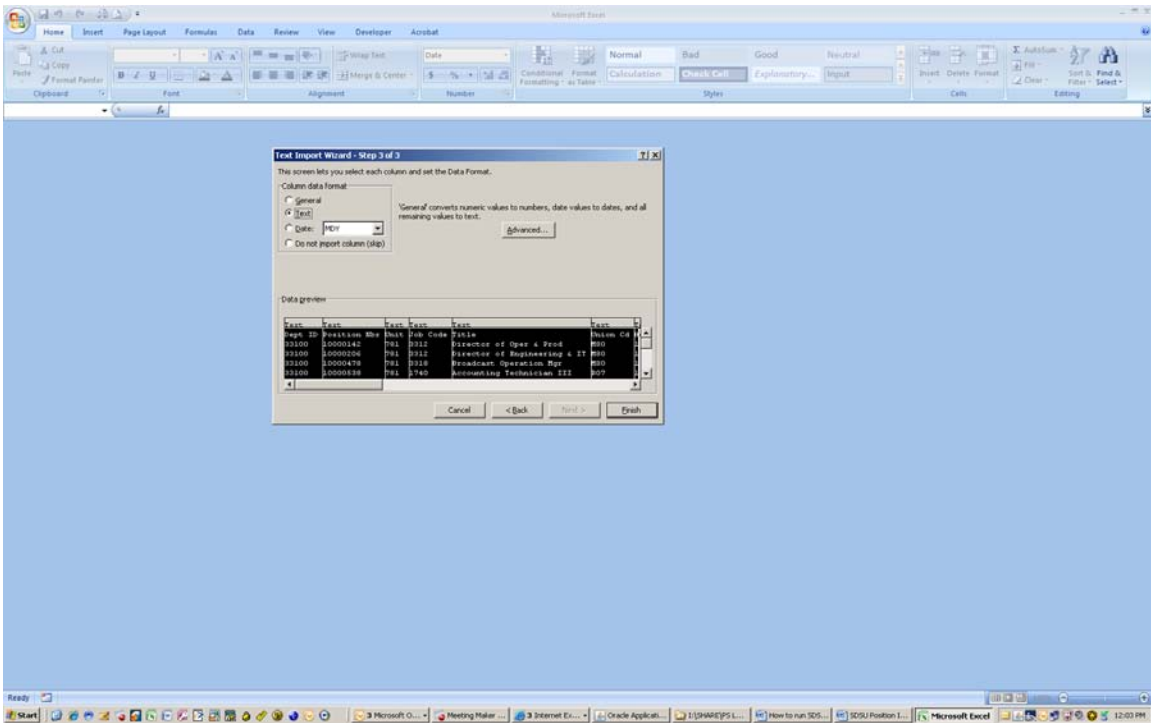
You will receive the TEXT IMPORT WIZARD upon opening the TEXT file.



Select DELIMITED and then select the NEXT button.



Select TAB and SEMICOLON and then select the NEXT button.



Select all columns and select Column Data Format TEXT. Then select the FINISH button. SAVE FILE AS file type EXCEL WORKBOOK.