

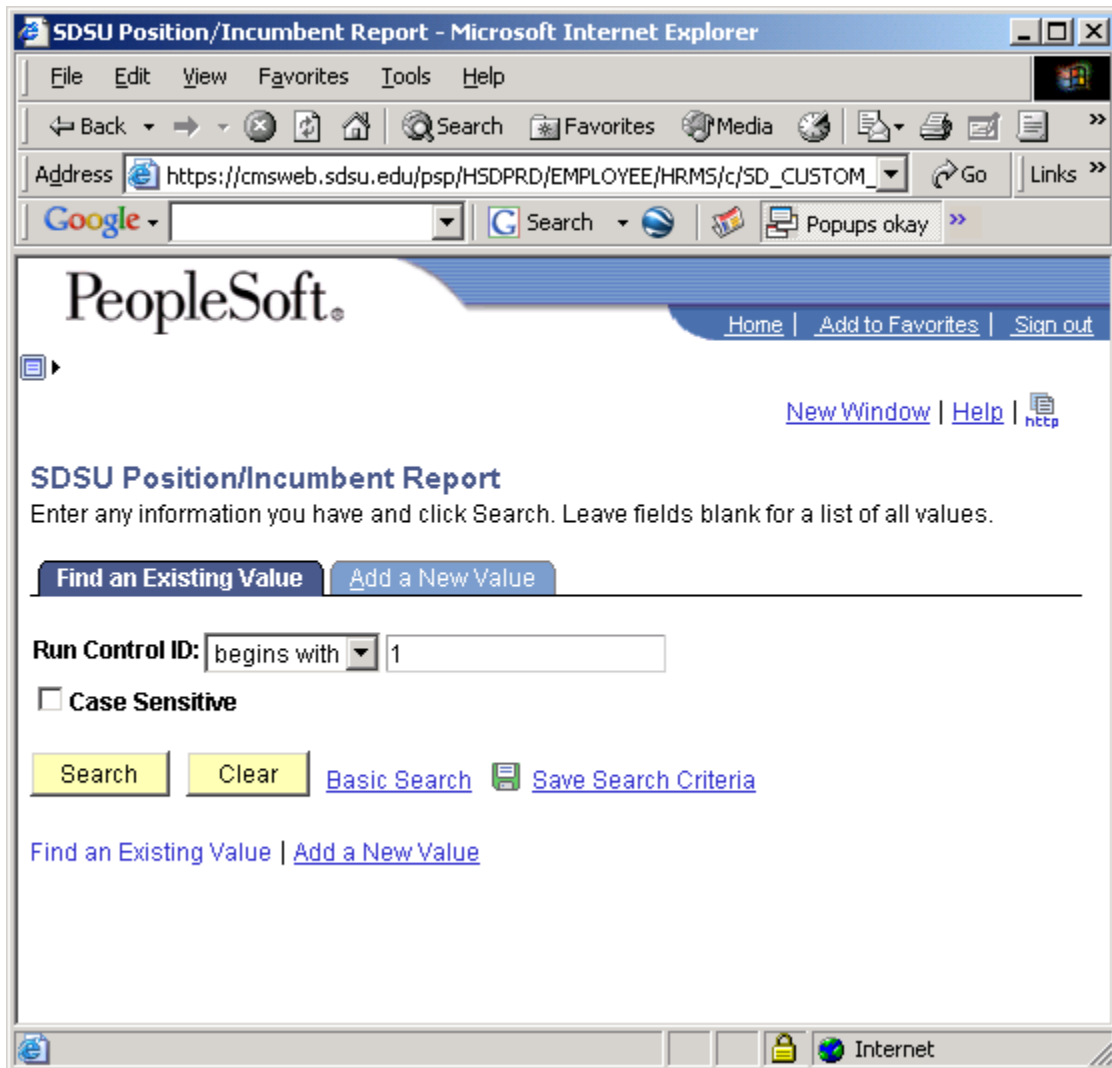
September 14, 2006

HOW TO RUN THE SDSU POSITION/INCUMBENT REPORT

Log into PeopleSoft

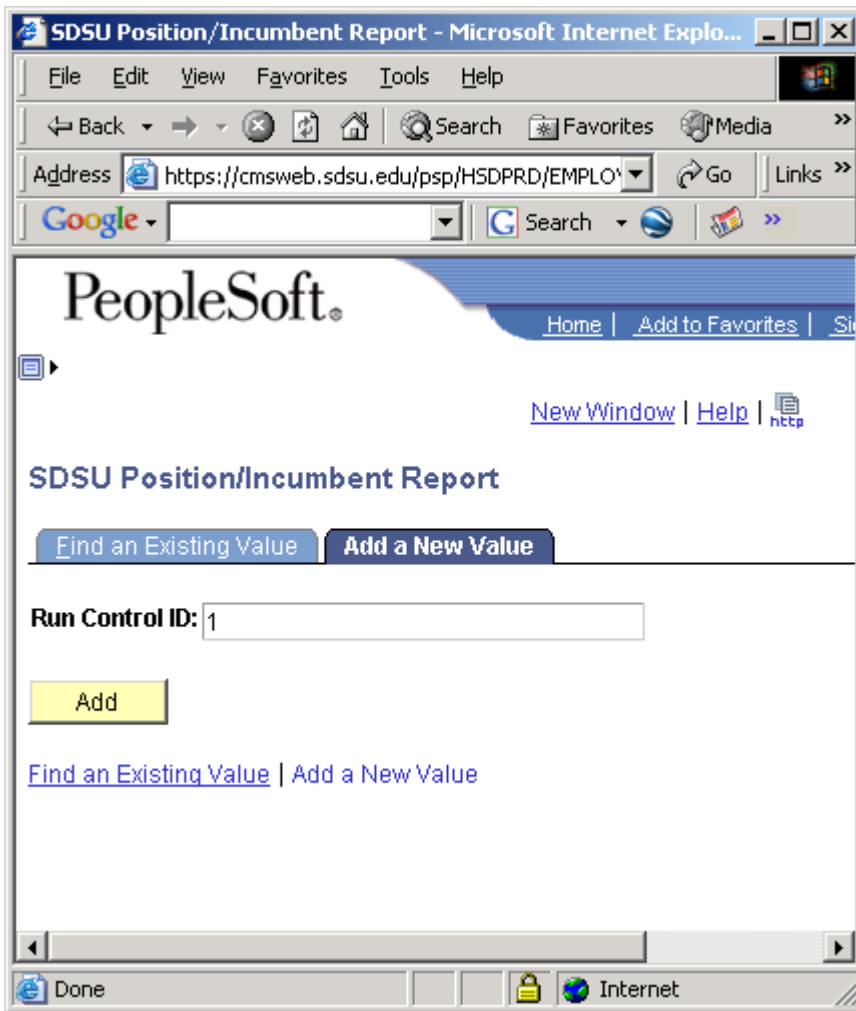
Navigation Path: **Main Menu> Organizational Development> Position Reports> SDSU Position/Incumbent Report**

You will see a Run Control screen like the one below. Type any value (I use "1") in the Run Control ID and click on the "Add a new value" tab.



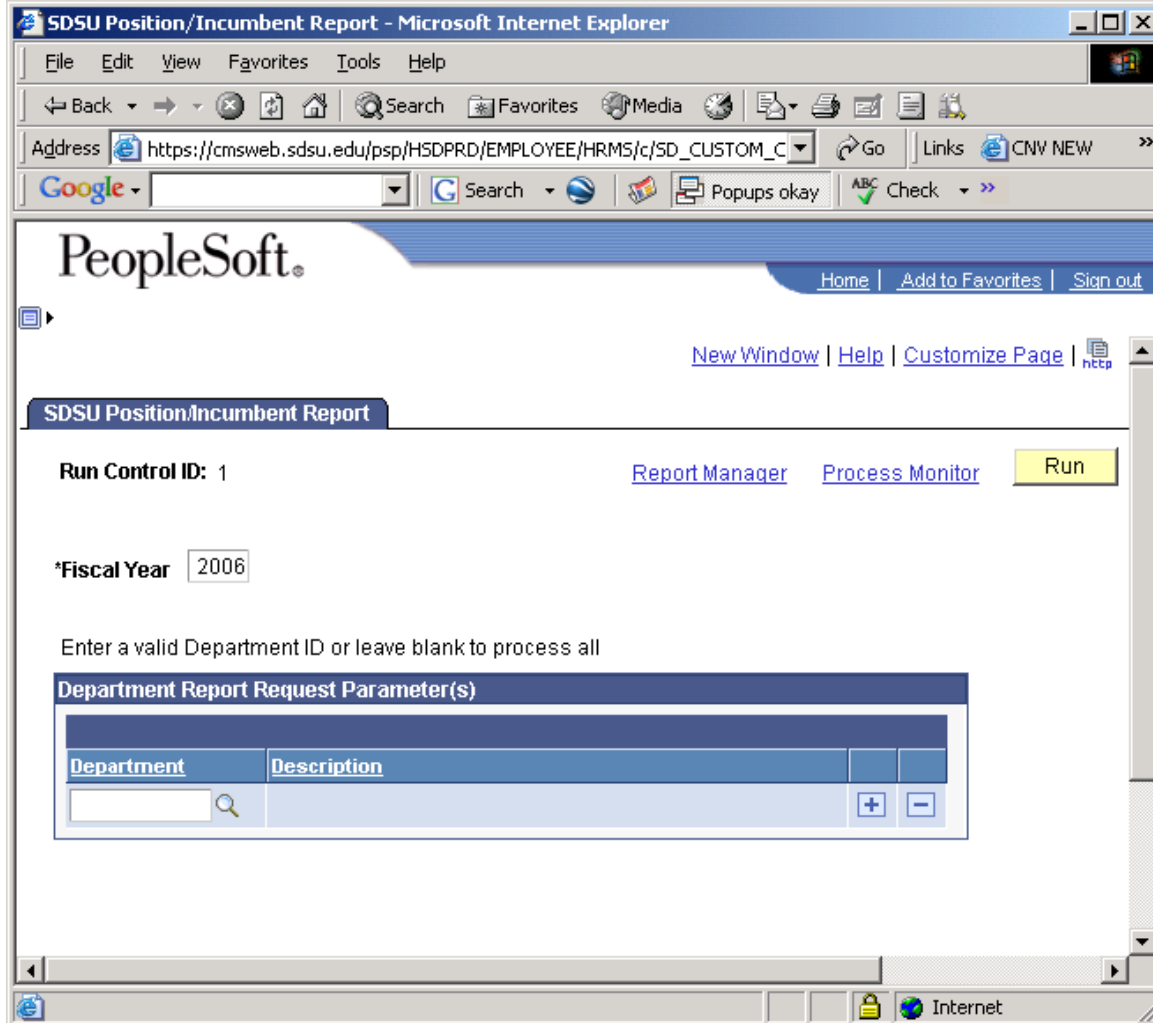
The screenshot shows a Microsoft Internet Explorer browser window titled "SDSU Position/Incumbent Report - Microsoft Internet Explorer". The address bar displays the URL: https://cmsweb.sdsu.edu/psp/HSDPRD/EMPLOYEE/HRMS/c/SD_CUSTOM_. The page content includes the PeopleSoft logo and navigation links: Home, Add to Favorites, Sign out, New Window, Help, and http. The main heading is "SDSU Position/Incumbent Report" with the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this are two tabs: "Find an Existing Value" (selected) and "Add a New Value". The "Run Control ID:" field has a dropdown menu set to "begins with" and a text input field containing "1". There is an unchecked checkbox for "Case Sensitive". At the bottom of the form are buttons for "Search" and "Clear", and links for "Basic Search" and "Save Search Criteria". At the very bottom of the page are links for "Find an Existing Value" and "Add a New Value". The browser's status bar at the bottom shows "Internet".

You'll get a second similar screen – click the yellow Add button



Then you see a screen that allows you to either put in a single department number, or, if you leave it blank, you should get all the departments that you have security to see.

Click the yellow “run” button.



The next screen is a confirmation that you want to run the report.

Click the yellow "OK" button.

The screenshot shows a web browser window titled "SDSU Position/Incumbent Report - Microsoft Internet Explorer". The address bar shows the URL: https://cmsweb.sdsu.edu/psp/HSDPRD/EMPLOYEE/HRMS/c/SD_CUSTOM_C. The page header includes the PeopleSoft logo and navigation links: Home, Add to Favorites, Sign out, New Window, Help, and Customize Page.

The main content area is titled "Process Scheduler Request" and displays the following information:

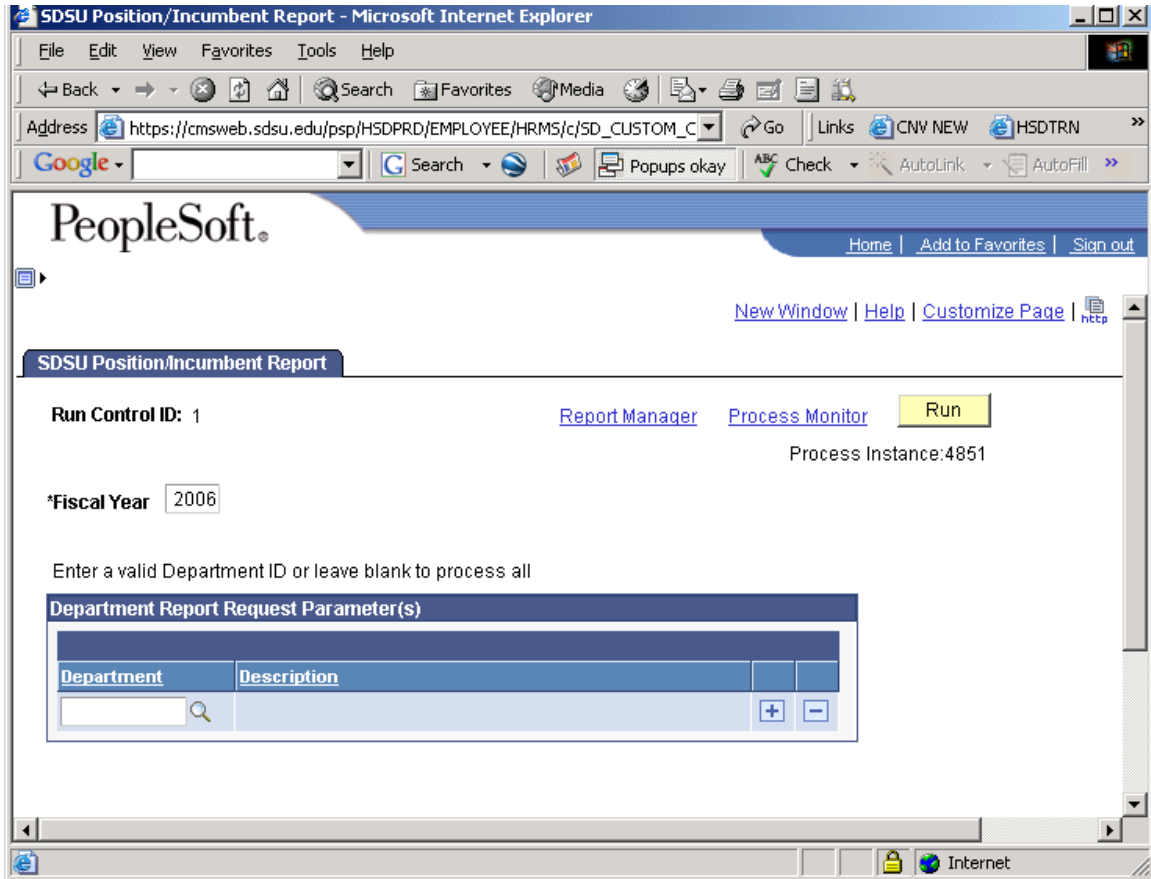
- User ID: 803852511
- Run Control ID: 1
- Server Name: PSUNX (dropdown menu)
- Run Date: 09/14/2006 (calendar icon)
- Recurrence: (empty dropdown menu)
- Run Time: 11:02:47AM
- Time Zone: (empty dropdown menu)
- Reset to Current Date/Time (yellow button)

Below the form is a "Process List" table:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SDLCDPOS	SDLCDPOS	SQR Report	Web	PDF	Distribution

At the bottom of the form are two yellow buttons: "OK" and "Cancel".

After clicking “OK”, it brings you back to a page that looks exactly like the page in two pictures above - EXCEPT it has the words “**Process Instance: xxxx**” right under the yellow Run button. This means you have already run it and now need to click on the blue words - “Process Monitor”.



Now you see a screen like below – look at the Run Status and Distribution Status columns. They will say “Processing” and “N/A”. You just have to keep clicking the yellow REFRESH button until those two columns say “Success” and “Posted”.

When you get Success and Posted, Click on “Details”.

The screenshot shows a web browser window displaying the PeopleSoft HRMS interface. The browser title is "SDSU Position/Incumbent Report - Microsoft Internet Explorer". The address bar shows the URL: "https://cmsweb.sdsu.edu/psp/HSDPRD/EMPLOYEE/HRMS/c/SD_CUSTOM_C...". The page header includes the PeopleSoft logo and navigation links like "Home", "Add to Favorites", and "Sign out". Below the header, there are tabs for "Process List" and "Server List". A section titled "View Process Request For" contains search filters for User ID, Type, Last (10 Days), Server, Name, Instance, Run Status, and Distribution Status. A "Refresh" button is visible. Below the filters is a table titled "Process List" with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains four rows of data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4851		SQR Report	SDLCDPOS	803852511	09/14/2006 11:02:47AM PDT	Processing	N/A	Details
<input type="checkbox"/>	4822		SQR Report	SDLCDPOS	803852511	09/14/2006 9:11:09AM PDT	Success	Posted	Details
<input type="checkbox"/>	4769		SQR Report	CSULCD11	803852511	09/13/2006 1:23:32PM PDT	Success	Posted	Details
<input type="checkbox"/>	4768		SQR Report	SDLCDPOS	803852511	09/13/2006 1:13:39PM PDT	Success	Posted	Details

...(still with me?)

You get a screen like the one below. Now click on the blue “View Log/Trace”

The screenshot shows a Microsoft Internet Explorer browser window displaying the PeopleSoft HRMS interface. The browser's address bar shows the URL: https://cmsweb.sdsu.edu/psp/HSDPRD/EMPLOYEE/HRMS/c/SD_CUSTOM_C. The PeopleSoft logo is at the top left, and navigation links for Home, Add to Favorites, and Sign out are at the top right.

The main content area displays details for a job named **SDLCDPOS**. The **Name:** and **Description:** are both SDLCDPOS. The **Run Status:** is Success, and the **Distribution Status:** is Posted.

There are four main sections:

- Run:** Run Control ID: 1, Location: Server, Server: PSUNX, Recurrence: (empty).
- Update Process:** A list of radio buttons for actions: Hold Request, Queue Request, Cancel Request, Delete Request, and Restart Request.
- Date/Time:** A table of key events:

Event	Date/Time
Request Created On:	09/14/2006 9:11:14AM PDT
Run Anytime After:	09/14/2006 9:11:09AM PDT
Began Process At:	09/14/2006 9:11:17AM PDT
Ended Process At:	09/14/2006 9:35:55AM PDT
- Actions:** Links for [Parameters](#) (Transfer), [Message Log](#), Batch Timings, and [View Log/Trace](#).

The browser's status bar at the bottom shows "Done" and "Internet".

You get a screen like the one below. To see the report, click on the blue words "sdlcdpos xxxx.txt".

The screenshot shows a Microsoft Internet Explorer browser window displaying a PeopleSoft web application. The browser's address bar shows the URL: https://cmsweb.sdsu.edu/psp/HSDPRD/EMPLOYEE/HRMS/c/SD_CUSTOM_C. The PeopleSoft logo is visible at the top left, and navigation links like 'Home', 'Add to Favorites', and 'Sign out' are at the top right. The main content area is titled 'View Log/Trace Report' and contains the following information:

- Report ID:** 2495
- Process Instance:** 4822
- Name:** SDLCDPOS
- Process Type:** SQR Report
- Run Status:** Success

Below this, there is a section for 'Distribution Details' with the following information:

- Distribution Node:** HSDPRD
- Expiration Date:** 09/16/2006

A 'File List' table is displayed below, showing the following files:

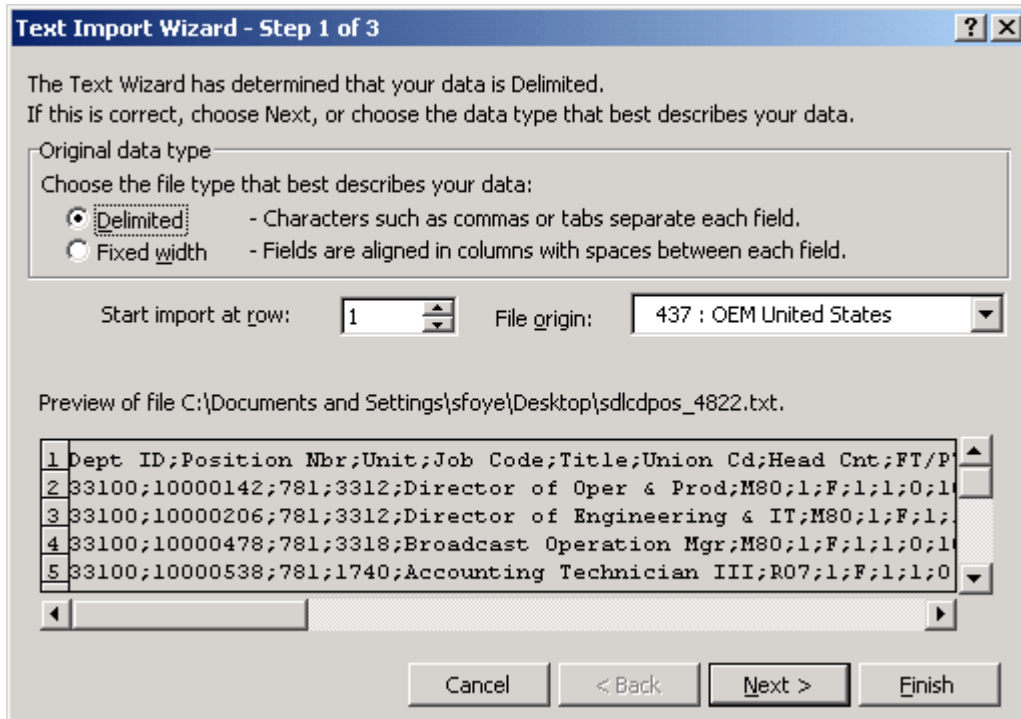
Name	File Size (bytes)	Datetime Created
Message Log	1,533	09/14/2006 9:35:55.000000AM PDT
Trace File	1,816,945	09/14/2006 9:35:55.000000AM PDT
sdlcdpos_4822.txt	911,125	09/14/2006 9:35:55.000000AM PDT

At the bottom, there is a 'Distribute To' section with a table for 'Distribution ID Type' and '*Distribution ID'.

Don't panic – it will look ugly – (sorry). After the file is open, you will see lots of text – with semi-colons separating data. Do a "File Save" and put it somewhere you can find it (Desktop?) - letting it save as a text file.

Then open up Excel and find the file with the .txt extension.

When you try to open it, it should bring up the text import wizard as seen below. Choose “delimited” and click “Next”.



The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

- Delimited - Characters such as commas or tabs separate each field.
- Fixed width - Fields are aligned in columns with spaces between each field.

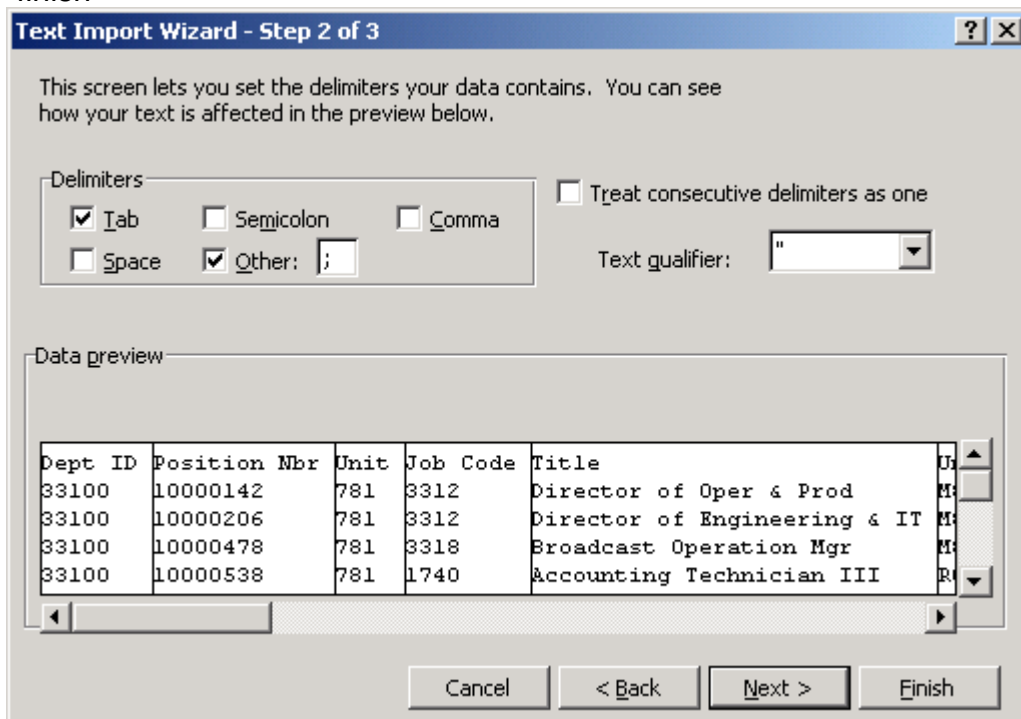
Start import at row: File origin:

Preview of file C:\Documents and Settings\sfoye\Desktop\sdldcpos_4822.txt.

1	Dept ID;Position Nbr;Unit;Job Code;Title;Union Cd;Head Cnt;FT/P
2	33100;10000142;781;3312;Director of Oper & Prod;M80;1;F;1;1;0;1
3	33100;10000206;781;3312;Director of Engineering & IT;M80;1;F;1;
4	33100;10000478;781;3318;Broadcast Operation Mgr;M80;1;F;1;1;0;1
5	33100;10000538;781;1740;Accounting Technician III;R07;1;F;1;1;0

Buttons: Cancel, < Back, Next >, Finish

Check the “Other” box and type a semi-colon next to it. Then click “next” or “finish”



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

- Tab
- Semicolon
- Comma
- Space
- Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

Dept ID	Position Nbr	Unit	Job Code	Title	Un
33100	10000142	781	3312	Director of Oper & Prod	M8
33100	10000206	781	3312	Director of Engineering & IT	M8
33100	10000478	781	3318	Broadcast Operation Mgr	M8
33100	10000538	781	1740	Accounting Technician III	R0

Buttons: Cancel, < Back, Next >, Finish

Voila – it’s now looking like an Excel spreadsheet! Be sure and save it now with an .xls extension.

You can run this whenever you want, now.