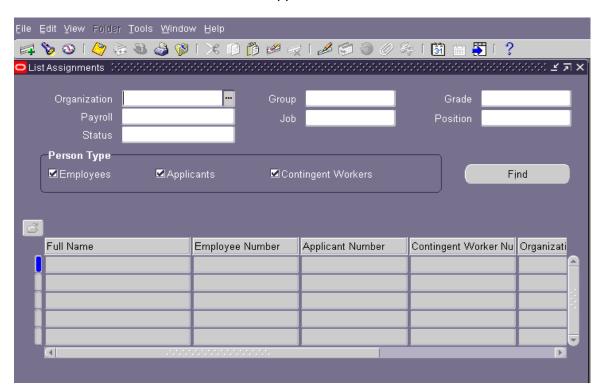# HR Data Views Documentation
## Using the Assignment List

The **ASSIGNMENT LIST** is an inquiry/extract tool provided to end users assigned the HR Officer responsibility.  The **ASSIGNMENT LIST** allows the HR Officer to *view* and *export* informational data on all *employees, students, trainees* and *volunteers* within their assigned HR organizational hierarchy.
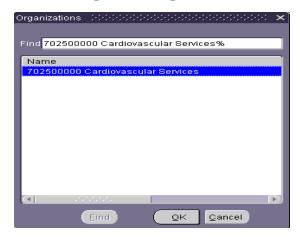
The data can be retrieved based upon seven flex fields:  **ORGANIZATION, PAYROLL, STATUS, GROUP, JOB, GRADE** and **POSITION**.  A query can be performed on a very large range (Organization) or a very narrow range (Organization, Status, Group and Grade) depending on the informational data desired.

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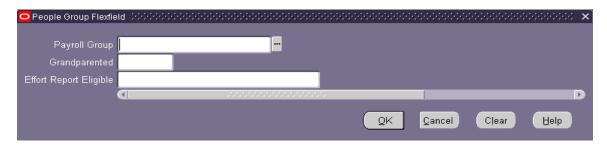**UAB HR Officer → HR Data View → Assignment List**

---

1.  The **LIST ASSIGNMENTS** window will appear.
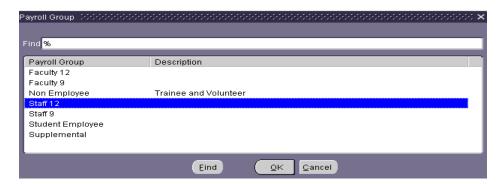


2.  Click in the **ORGANIZATION** field.  *Note: If field is left blank, listing will default to the responsibilities HR organizational hierarchy*.

3.  Click on the **LOV** and look up the Organization.  You can also enter the Organization number if known.  *Note:  If you know part of the Organization number, you can enter the number followed by the percent sign (%) wildcard.*

## Appoint, Change and Terminate (ACT) Documentation
## Using the Assignment List

**Organizations**                                                    ✕

Find 702500000 Cardiovascular Services%

| Name |
| --- |
| 702500000 Cardiovascular Services |

Find          OK          Cancel

4. After selecting the **ORGANIZATION**, the cursor will move to the **GROUP** field.  Click on the **LOV**, the **PEOPLE GROUP FLEX FIELD** window will open.  *You can skip this window if you want to view ALL EMPLOYEES.*

**People Group Flexfield**                                                    ✕

Payroll Group [                    ] ...
Grandparented [          ]
Effort Report Eligible [                    ]

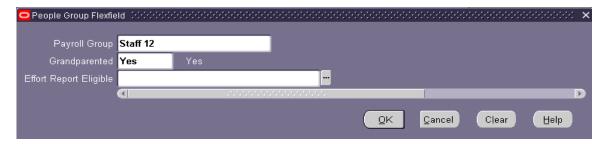OK     Cancel     Clear     Help

5. If you want to see a selected group of employees, click on the LOV for the **PAYROLL GROUP**.  The **PAYROLL GROUP** list is the same list used in **ACT**.  *You can skip this field if you want to view all employees.*

**Payroll Group**                                                    ✕

Find %

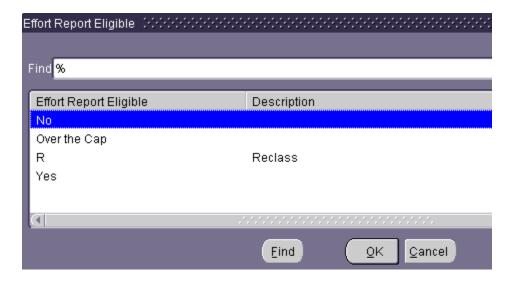| Payroll Group | Description |
| --- | --- |
| Faculty 12 | |
| Faculty 9 | |
| Non Employee | Trainee and Volunteer |
| Staff 12 | |
| Staff 9 | |
| Student Employee | |
| Supplemental | |

Find          OK     Cancel

6. If you want to view the **GRANDPARENTED** employees, click inside the field.  It will immediately return a **YES** answer.  *You can skip this field if you want to view all employees.*

(***Note:  Grandparented employees are employees whose position at one time was classified as a salaried/monthly paid position, and has been reclassified to a biweekly paid position.  The employee retains the monthly paid status even though the position he/she holds is biweekly.***)
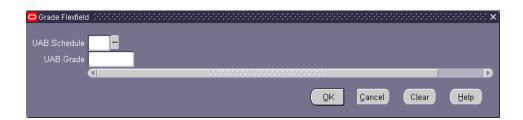
7. If you want to view **EFFORT REPORT ELIGIBLE** employees, click in the **EFFORT REPORT ELIGIBLE** field. Click on the **LOV**.



8. When you have made your selection, click on the **OK** button. *You can skip this field if you want to view all employees.*

9. When you have made your selections on the **PEOPLE GROUP FLEXFIELD** window, click on the **OK** button. This returns you to the **LIST ASSIGNMENT** window.

10. If you wish to analyze data for a selected UAB Grade, click in the **GRADE** field. The **GRADE FLEXFIELD** window opens. *You can skip this field if you want to view all employees.*

*(Note: All Faculty, Employees, Students, Trainees and Volunteers are assigned a UAB SCHEDULE and UAB GRADE)*. This information can be located within **ACT**.
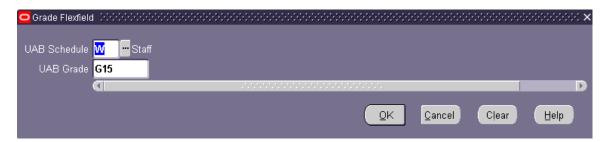
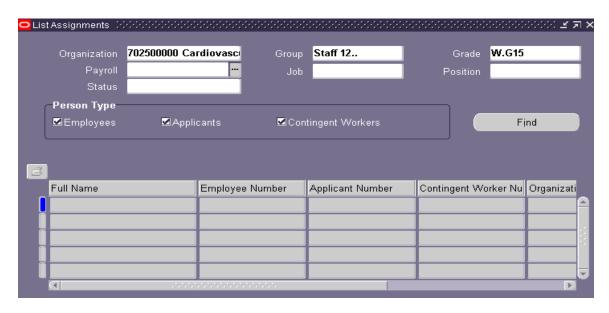11. Click on the **UAB SCHEDULE LOV.** The list below will appear.



12. You can make a selection here by clicking on the appropriate line and then clicking on the OK button or double click on the selection. *You can skip this field if you want to view all employees.*

13. The other field in the **GRADE FLEXFIELD** window is **UAB GRADE**. You can use the **LOV** to locate the grade, or type in the appropriate grade.



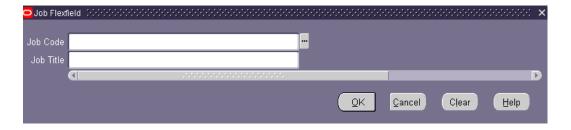14. When you have made your selection, click on the **OK** button.

15. Click the **OK** button on the **GRADE FLEXFIELD** window, this will return you back to the **LIST ASSIGNMENTS** window.



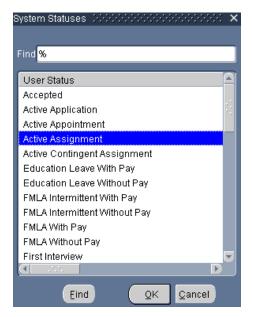(*In the above example, the* **ORGANIZATION, GROUP** *and* **GRADE** *fields have been chosen. If we were to run the Assignment List at this point, a listing of all Cardiovascular Nursing, Staff 12, with Grade W.G15 will appear in the list. This list will include both active and inactive assignments*).

16. You may further refine the Assignment List by clicking in the following fields and selecting the desired parameters:

- **JOB**

- **STATUS**



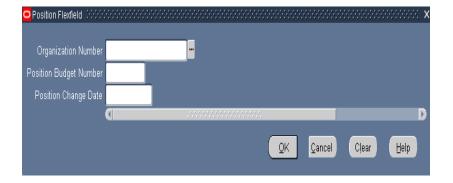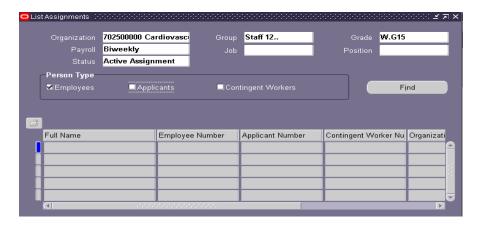Currently the only System Statuses available are: **Active Assignment**, **Terminated Assignment** and **Voluntary**. Selecting any of the other statuses will not deliver any results.
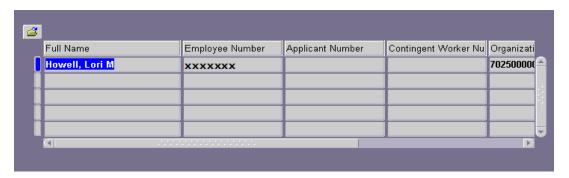
- **POSITION**



17. Once the parameters have been selected, return to the **LIST ASSIGNMENT** window.



18. Before clicking on the **FIND** button, *remove checks from the Applicants and Contingent Workers check box.*

19. Click on the **FIND** button.

20. A list of employees will appear.  Your list may be shorter or longer depending on the parameters you selected. (**PAYROLL, GROUP, JOB, GRADE,** etc.)

| Full Name | Employee Number | Applicant Number | Contingent Worker Nu | Organizati |
|-----------|-----------------|------------------|----------------------|------------|
| Howell, Lori M | xxxxxxx | | | 702500000 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

***Once the search is complete, you may:***

- Rearrange the columns of information;
- Add more columns;
- Hide columns;
- View by date; or
- Export to Excel.

21. The **TOOLBAR** gives you the ability to personalize the **ASSIGNMENT LIST**.

- The **FLASHLIGHT** returns you to the **LIST ASSIGNMENT** window for search.
- The **COMPASS** returns you to the **NAVIGATOR** window.
- The **PRINTER** prints what displays on your screen
- The **YELLOW FOLDER WITH THE SCREWDRIVER AND THE HAMMER** opens the **FOLDER TOOLS**.
- The **CALENDAR ICON** allows you to specify a date in time.

Alter Effective Date

Effective Date  01-MAR-2004  ···      Today's Date  11-NOV-2005

OK          Reset          Cancel

*(The Effective Date field can be changed in order to specify a period in time. Using the above example, the Assignment Listing will display data as it appeared in the Administrative Systems on March 1, 2004.  Changes made after that date will not be displayed.)*

- The **EXPORT ICON**  **IS NOT A WORKING ICON DO NOT USE!!**
**FOLLOW DIRECTIONS IN STEP # 27 TO EXPORT DATA**

22. The **FOLDER TOOLS** gives you the ability to further customize the **ASSIGNMENT LIST.**

23. Click on the **YELLOW FOLDER WITH THE SCREWDRIVER AND HAMMER** in the **TOOLBAR** to open the **FOLDER TOOLS** window.
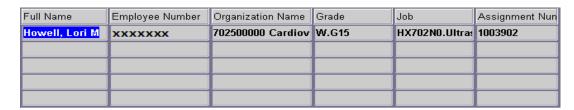
- The second row of icons allow you to:

Widen a column
Shrink a column
Insert more columns
Hide unwanted columns
Move columns to the left or right.



24. You can also use **FOLDER** on the Menu bar to display available tools.



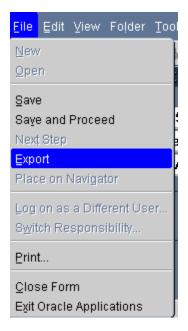25. The image below has had the **GRADE** and **JOB** columns added and the **APPLICANT NUMBER** and **CONTINGENT WORKER NUMBER** columns have been hidden.

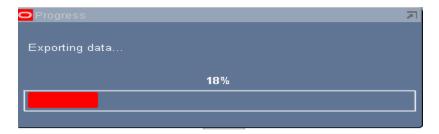| Full Name | Employee Number | Organization Name | Grade | Job | Assignment Num |
|---|---|---|---|---|---|
| Howell, Lori M | xxxxxxx | 702500000 Cardiov | W.G15 | HX702N0.Ultra: | 1003902 |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

26. If you choose to export the data, go to **FILE, EXPORT.**

   *THIS IS THE ONLY METHOD OF EXPORTING DATA FROM THE ASSIGNMENT LIST.*

   *DO NOT USE THE EXPORT ICON ☐ LOCATED IN THE TOOL BAR!!!*

| File | Edit | View | Folder | Tool |
|------|------|------|--------|------|
| New | | | | |
| Open | | | | |
| Save | | | | |
| Save and Proceed | | | | |
| Next Step | | | | |
| **Export** | | | | |
| Place on Navigator | | | | |
| Log on as a Different User... | | | | |
| Switch Responsibility... | | | | |
| Print... | | | | |
| Close Form | | | | |
| Exit Oracle Applications | | | | |

27. The following box will display while information is being exported.

   Progress

   Exporting data...

   18%
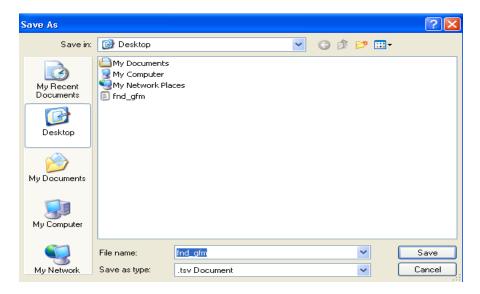
28. Once the data has been exported, the **FILE DOWNLOAD** window will appear. Click on the **SAVE** button.

   **File Download**

   **Do you want to open or save this file?**

   Name: fnd_gfm.tsv
   Type: ft000001, 173 bytes
   From: oadev.tucc.uab.edu

   [ Open ]   [ Save ]   [ Cancel ]

   ☑ Always ask before opening this type of file

   While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

   **Note:**  If the above window does not appear after the exporting process runs; hold the *CTRL key* on the computer keyboard and perform the export again.  *Be sure to hold the CTRL key during the entire export process*.

29. After you click on the **SAVE** button, the following window will appear.  Your window may have a different folder.  You can save this file anywhere on your hard drive or network drive.



30. Before you click on the **SAVE** button, write down the name of the file or rename it. Make sure you also note the folder name.  The file extension can stay as a **.tsv** file. Excel and or Access will know how to import the data.


31. Click on the **Save** button.

32. Open Excel; use **File**, **Open** or the file open icon on the toolbar to open the file.  You may have to change **Files of Type** to **All files** in order to locate the document.

33. Excel or Access will open a wizard that will assist you in performing the tab delimited import process.

**RETURN TO TOP**