

Subject: SDSU POSITION/INCUMBENT REPORT PROCESS

Department: Budget & Finance

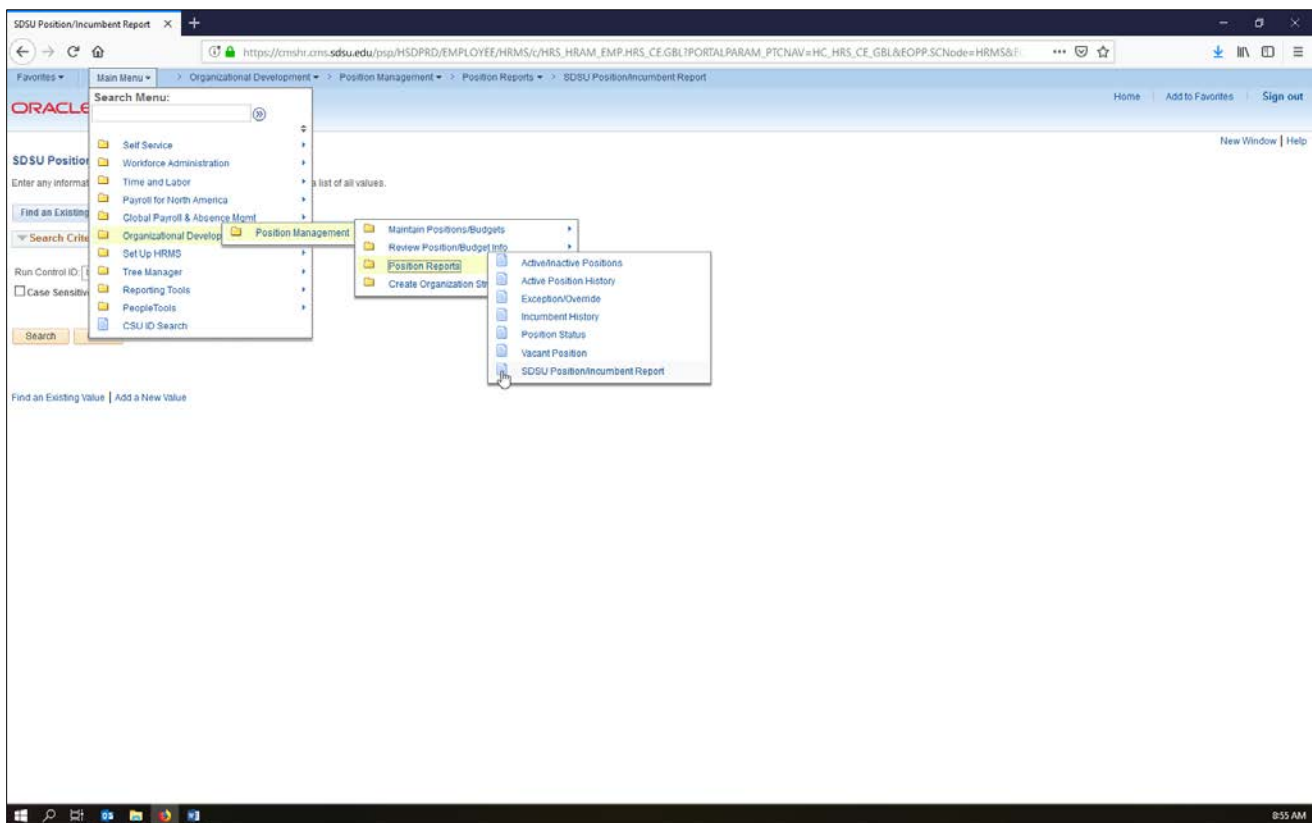
Date: March 2019

SDSU Position Incumbent Report:

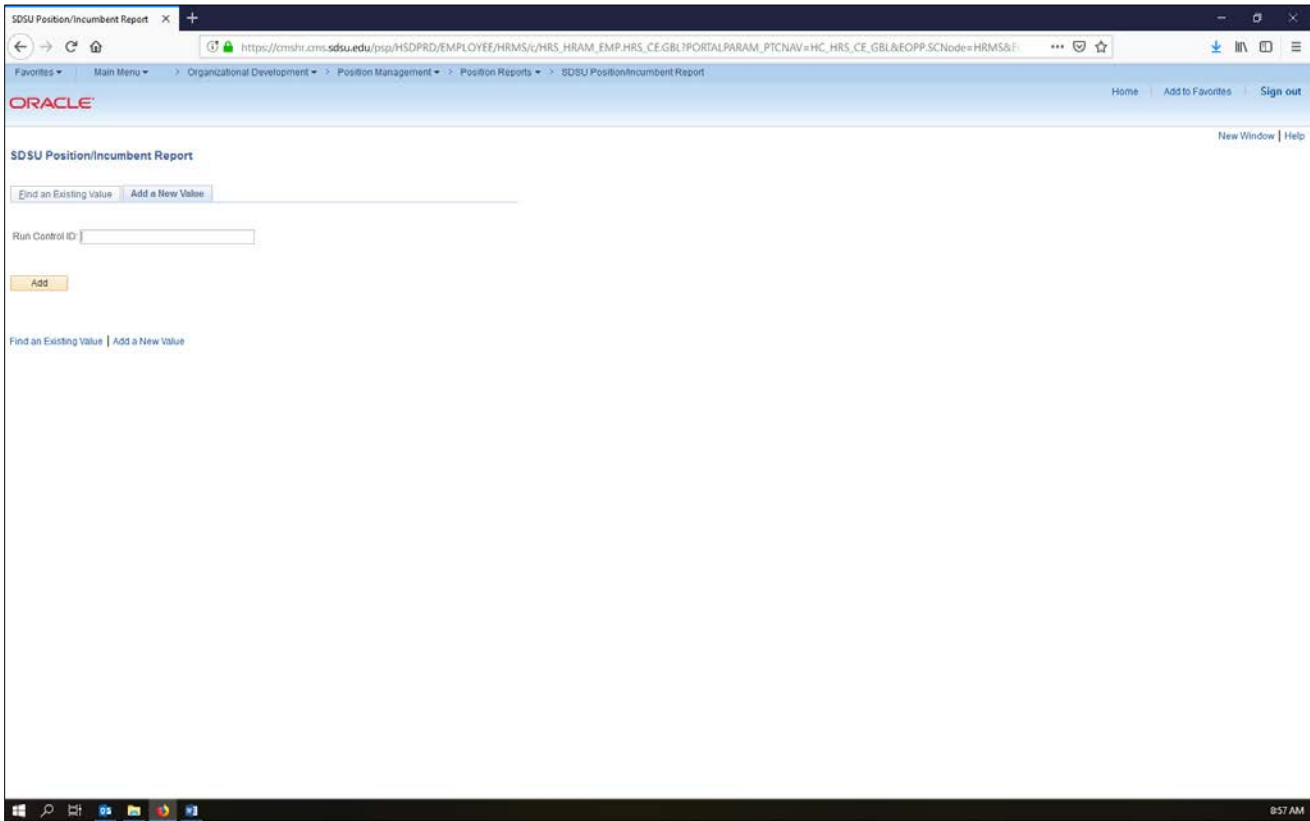
The SDSU Position Incumbent Report is a tool available to departmental/divisional coordinators to assist in managing position data and position funding sources. Users must be granted access to run this report. If you do not currently have access, please complete and submit a [PeopleSoft Account Access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

Instructions to Run Report:

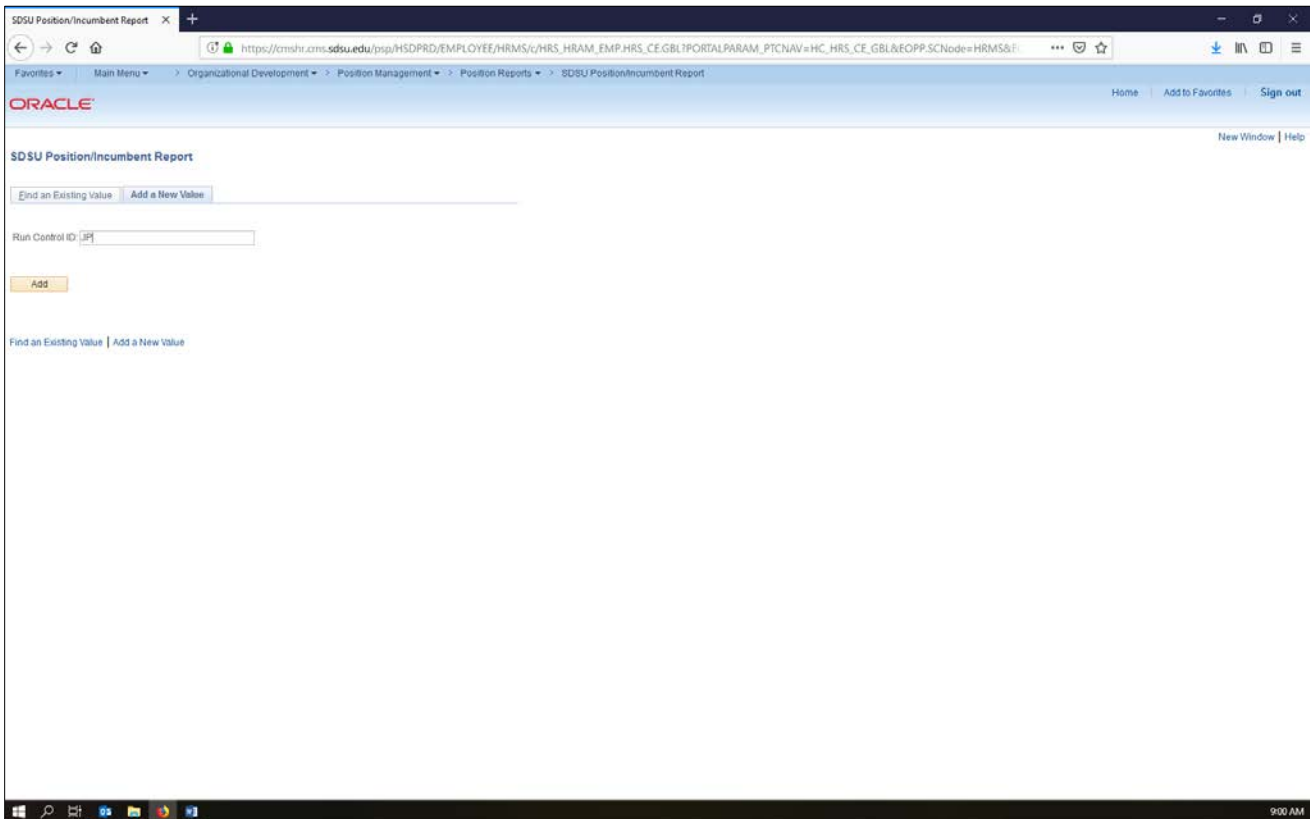
Go to **Main Menu** and click on **Organizational Development** > **Position Management** > **Position Reports** > **SDSU Position/Incumbent Report**:



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:

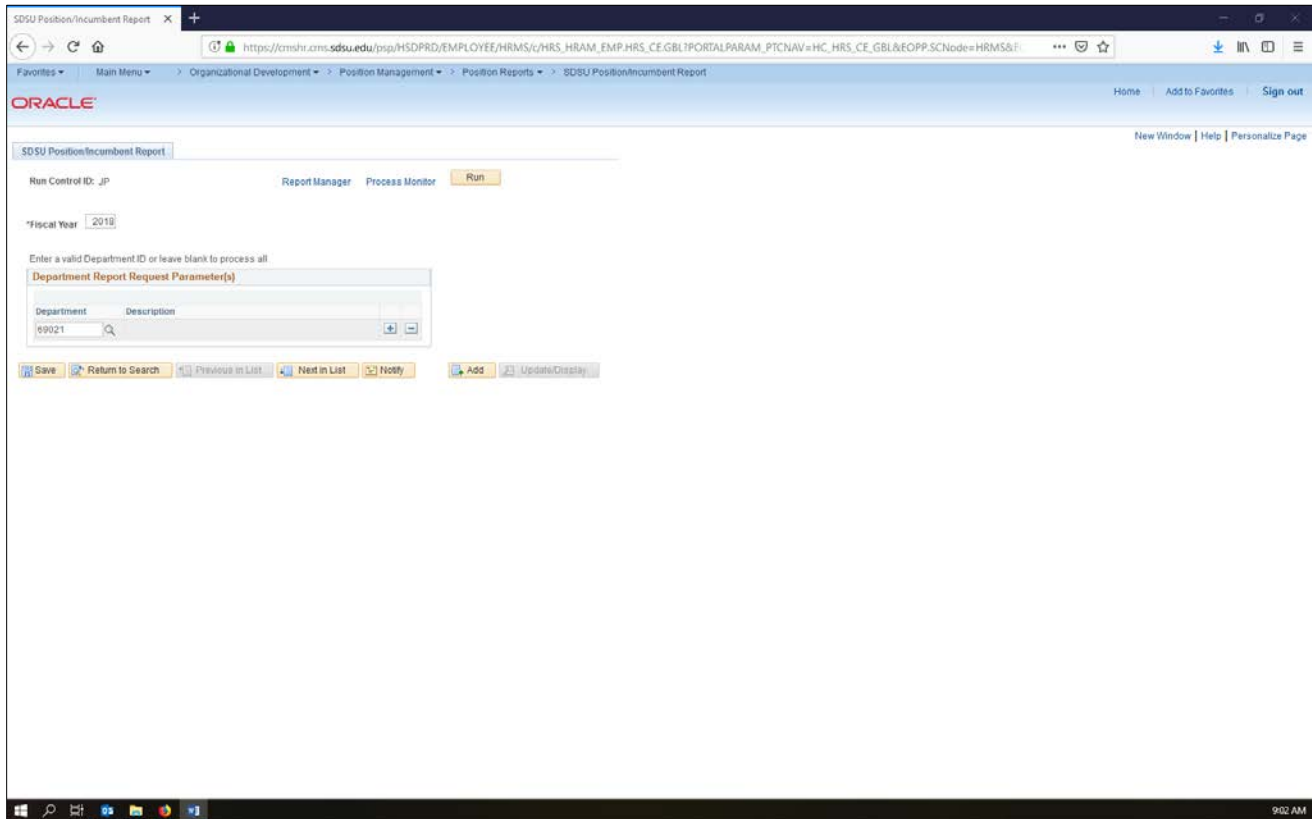


You can enter anything for your run control, e.g. initials, etc. We are entering “JP” in this case; then select Add:

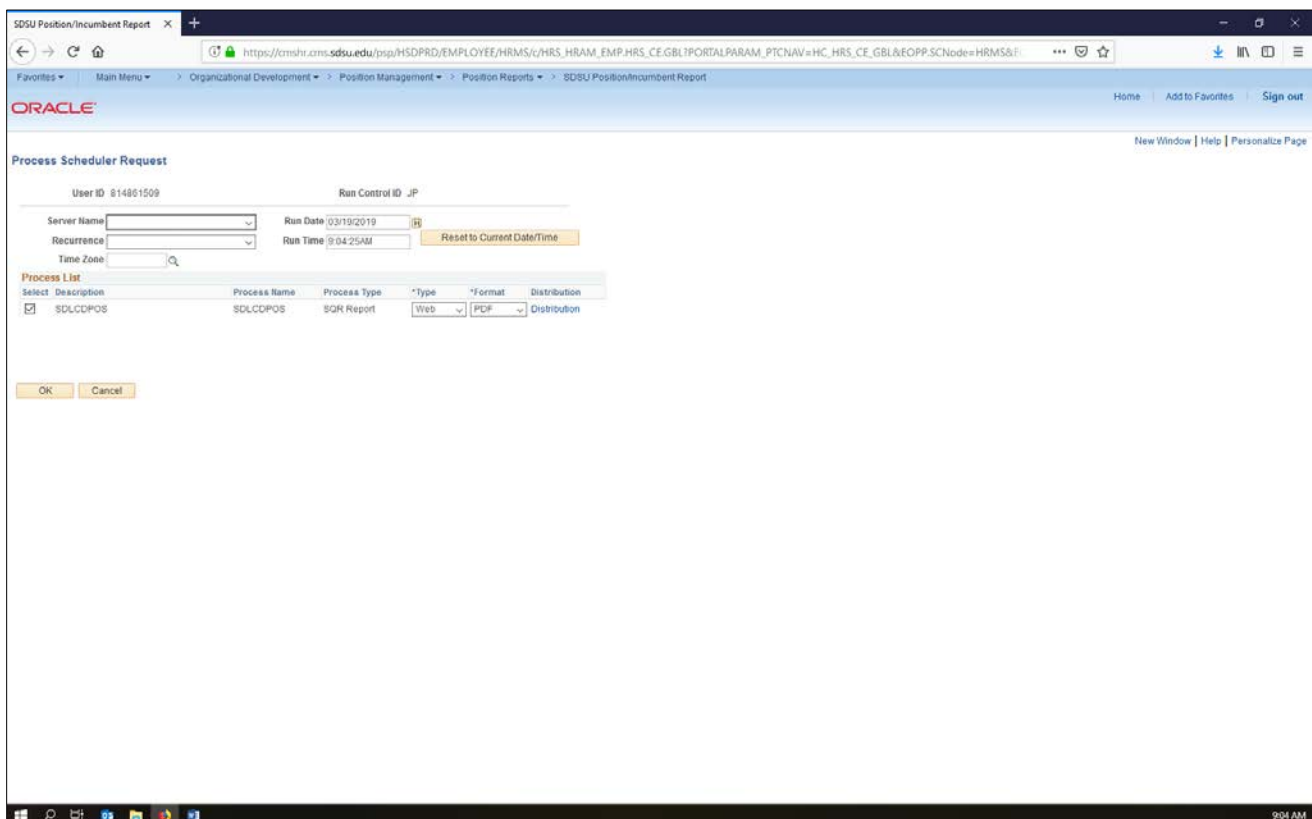


The next time you run the report, you will be able to just enter the value you created (use the Find an Existing Value tab) or find it listed by clicking on the yellow Search button.

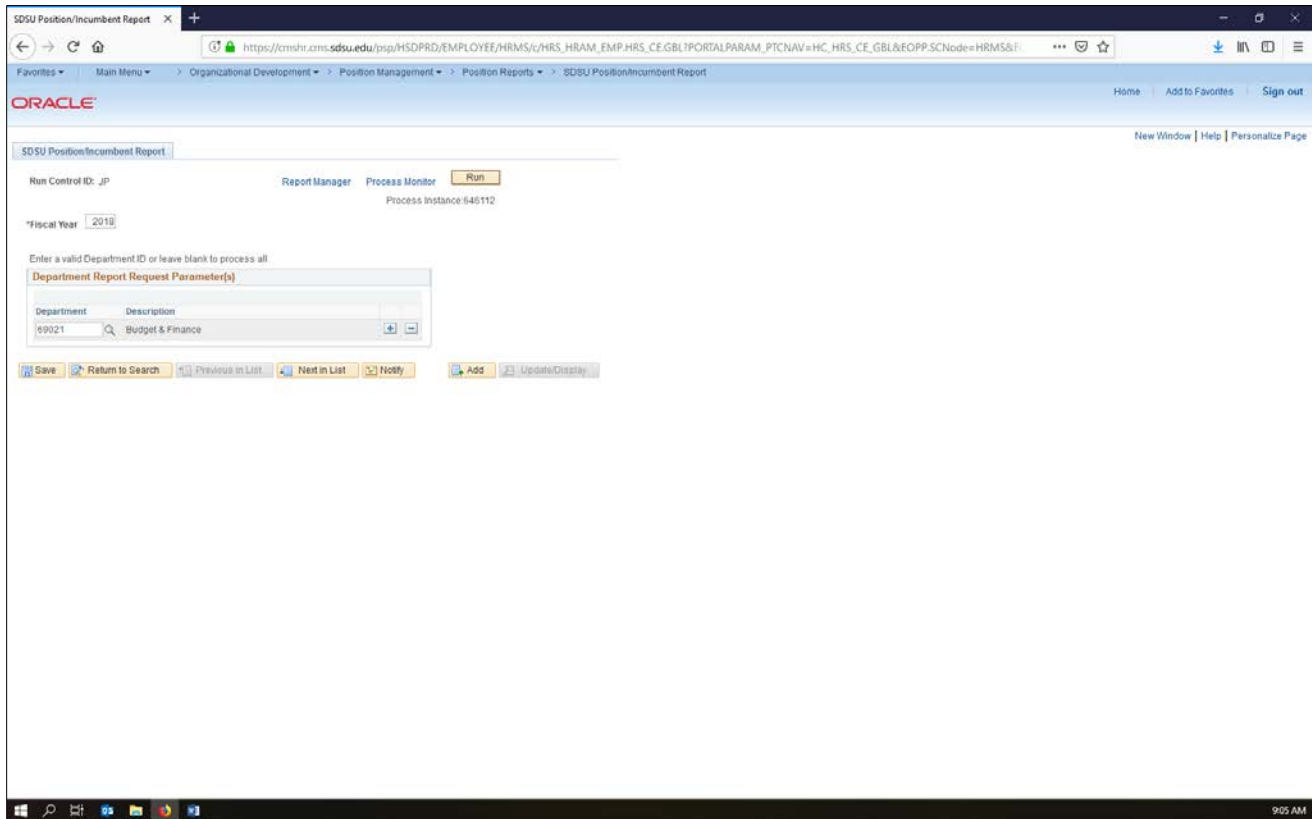
For your report criteria you can enter a specific Dept ID, or leave the Department field blank if you want to see all the positions you have security permission to access. We are entering B&F Dept ID in this case:



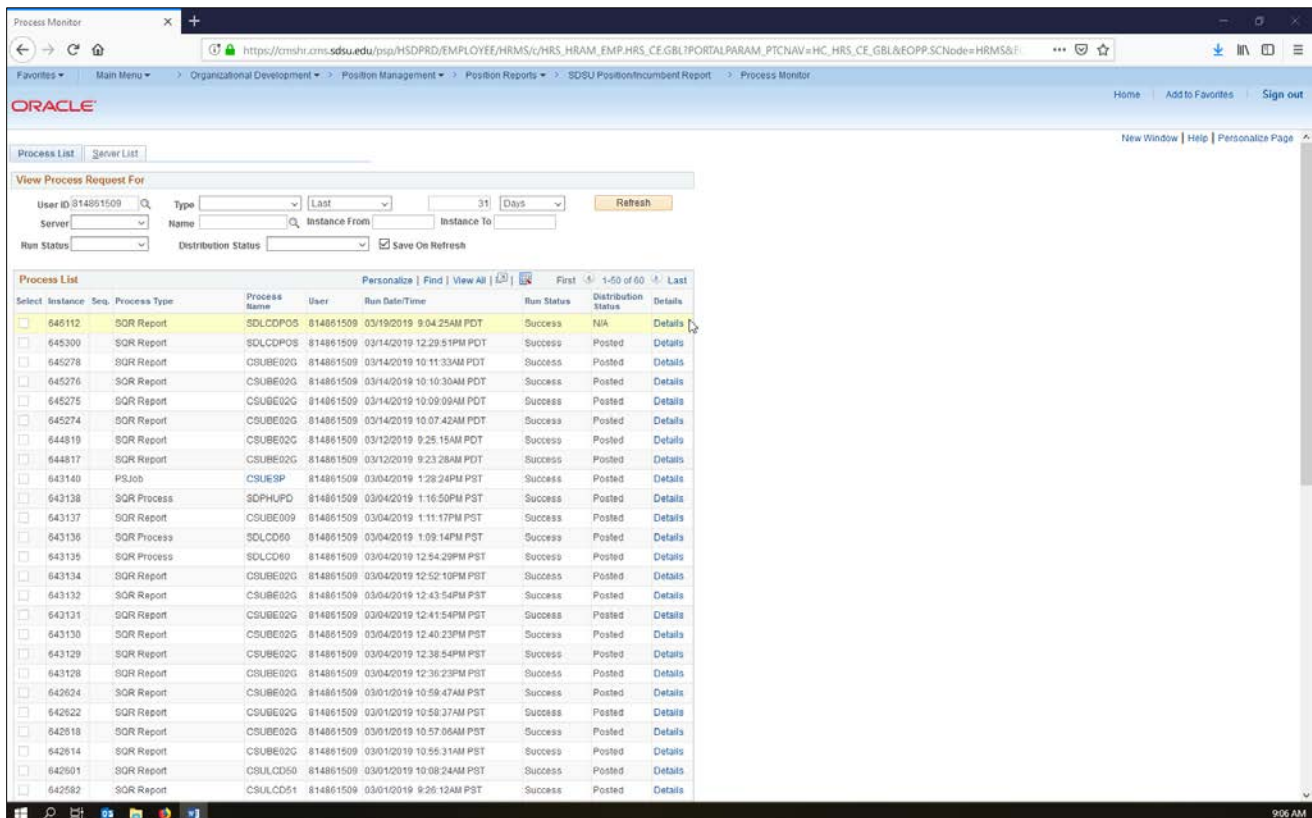
Enter your selection(s) or leave the Department field blank and click Run; then click OK:



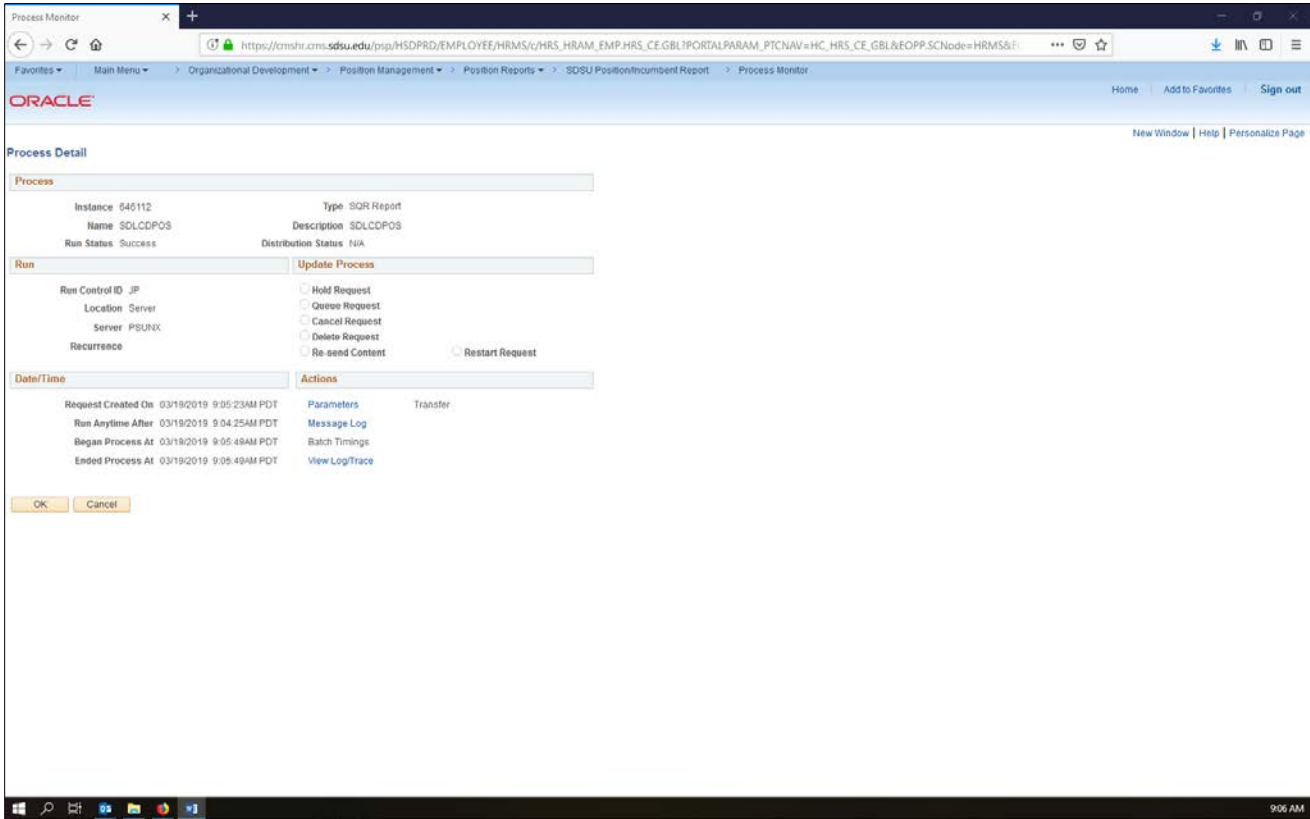
You will see a process instance number that tells you the request has been submitted:



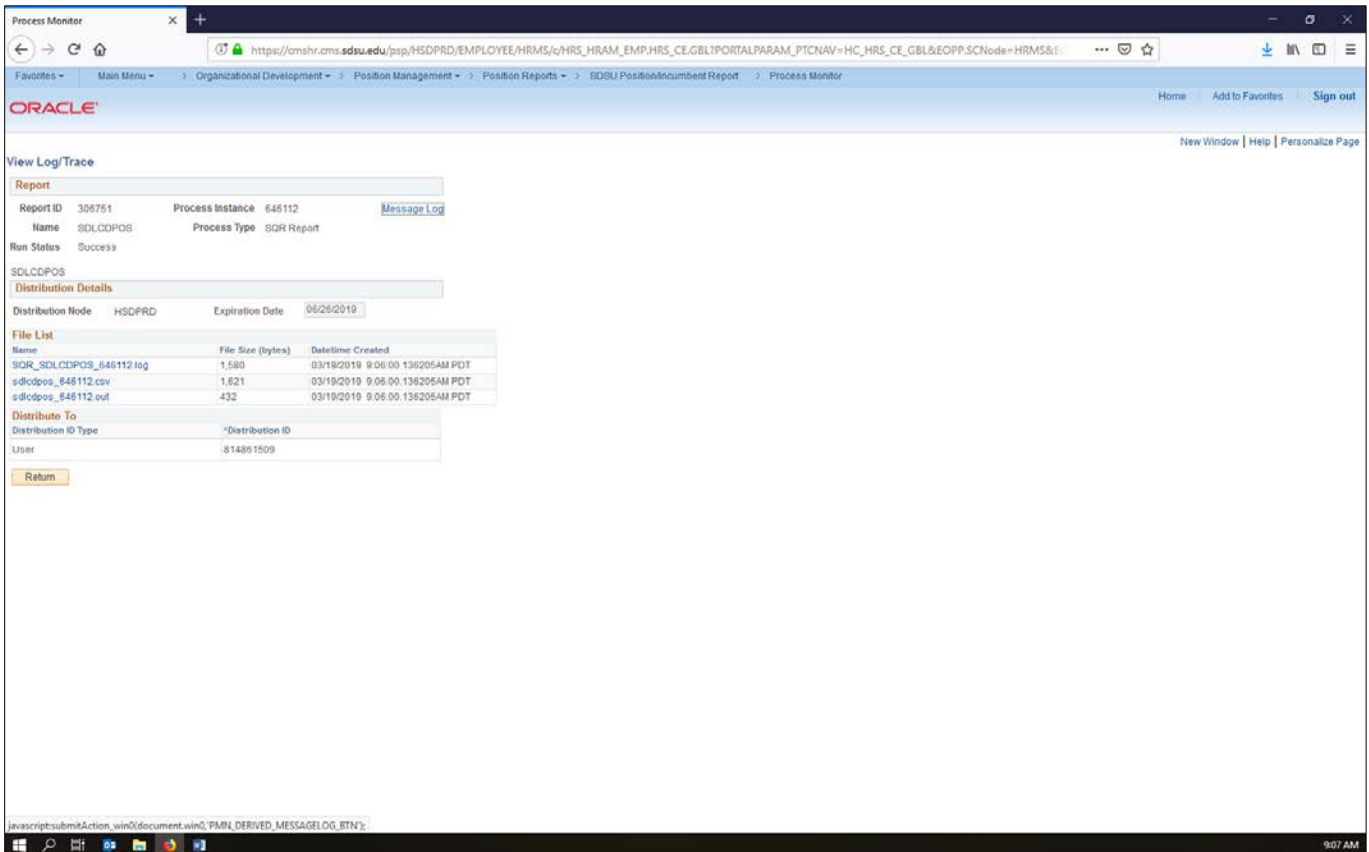
Click on Process Monitor and you will see the following:



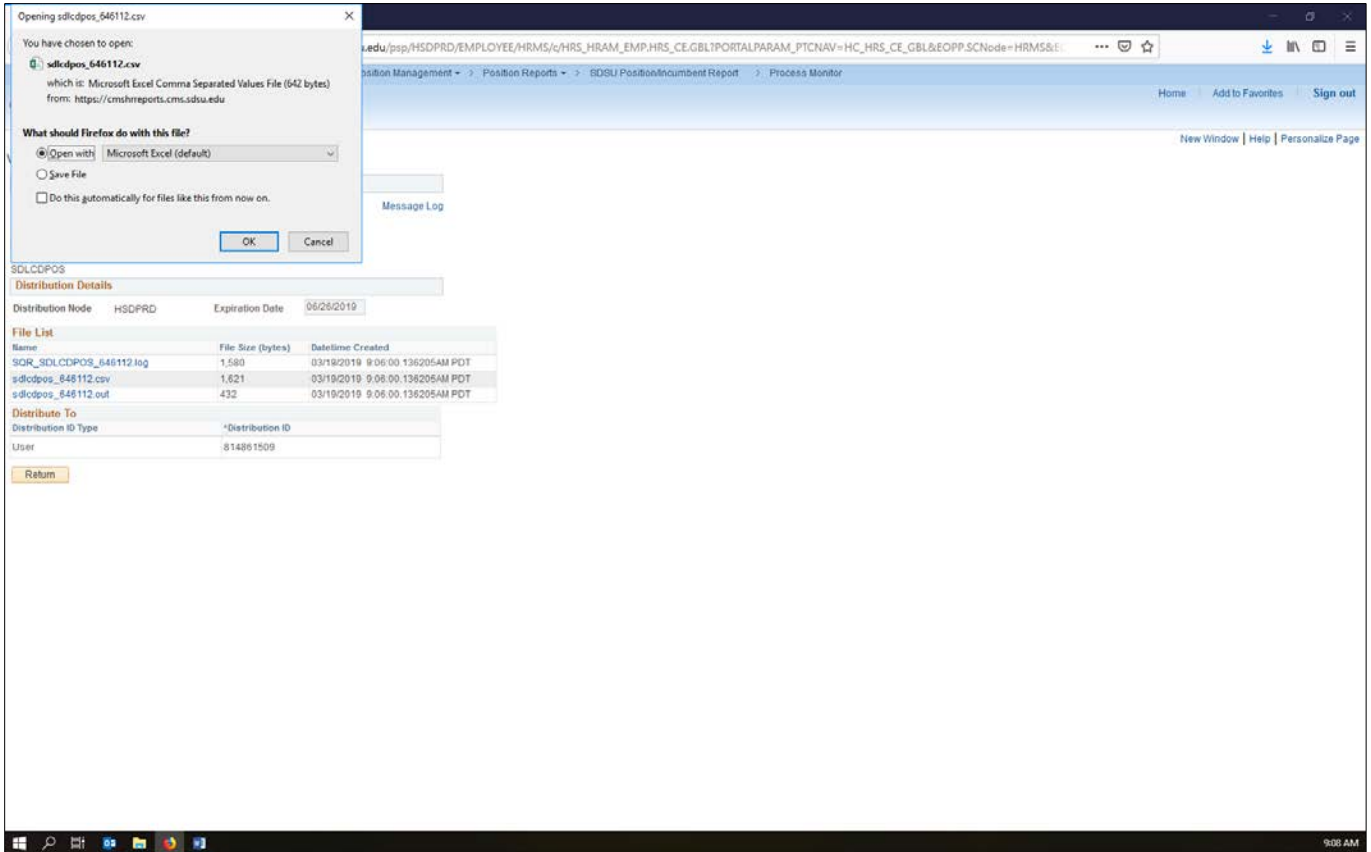
Click on Details and it will bring you to the following screen:



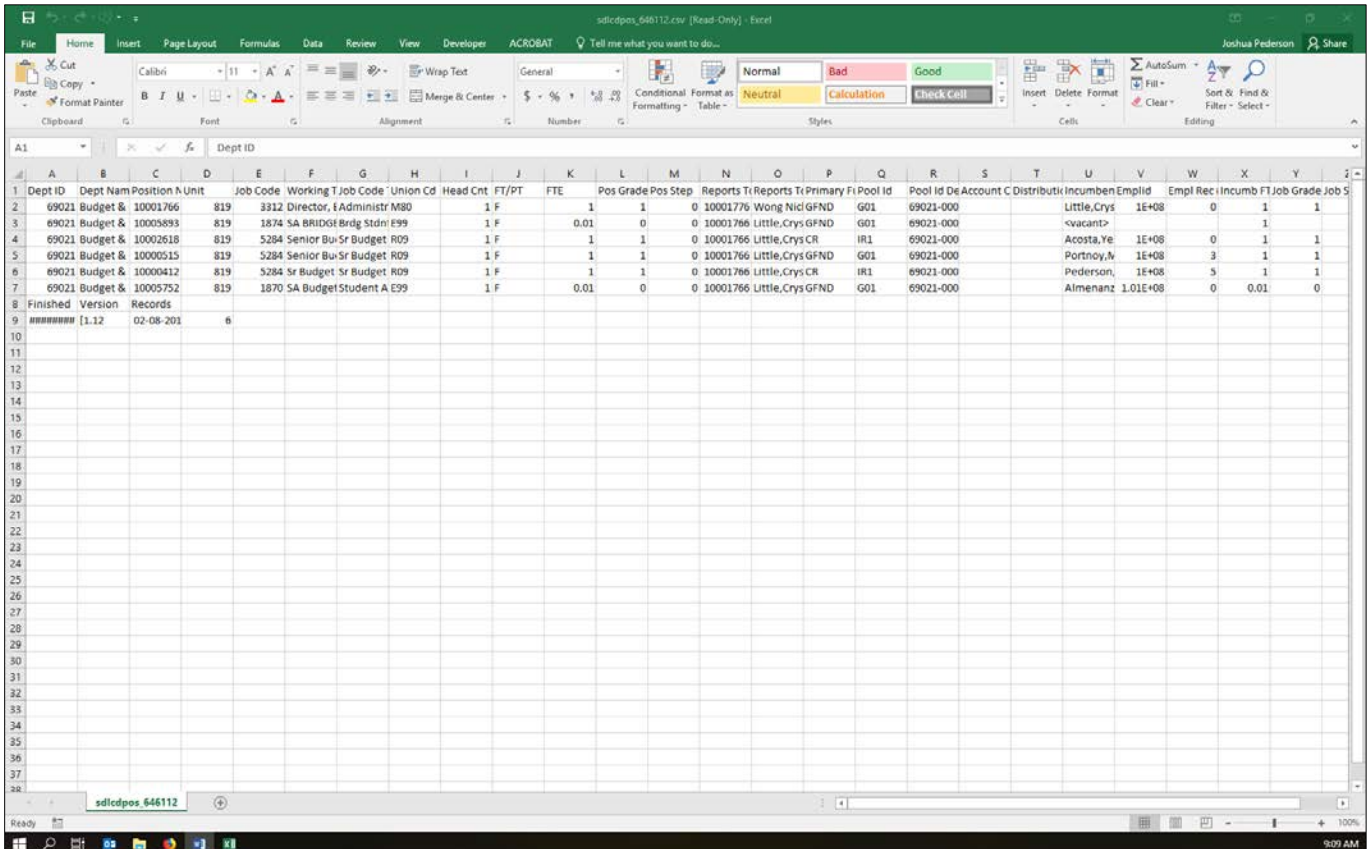
Click on View Log/Trace to find the report you are looking for:



Select the CSV file; this is the position incumbent report in the rough:



Click OK in the dialog box to open the CSV file:



From here, you can format the report as desired; just be sure to save the file in the correct format (e.g. .xlsx).