

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

The **ASSIGNMENT LIST** is a tool provided within ACT 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 organizational responsibilities. 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.

UAB HR Officer → HR Data View → Assignment List

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

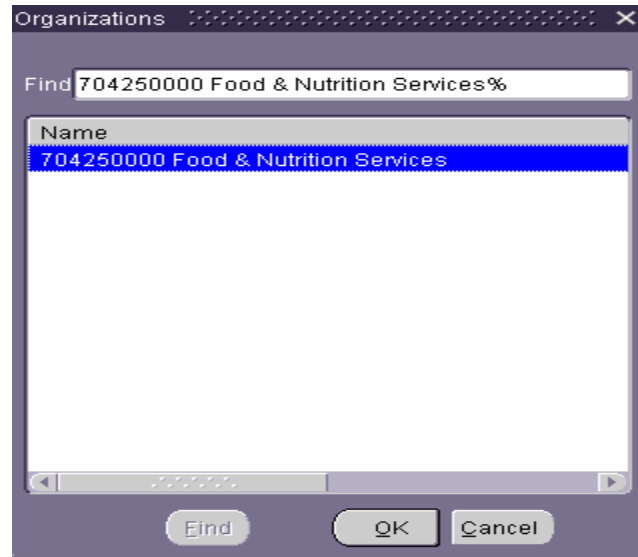
The screenshot shows the 'List Assignments' window. It features a menu bar (File, Edit, View, Folder, Tools, Window, Help) and a toolbar with various icons. Below the toolbar are search filters for Organization, Payroll, Status, Group, Job, Grade, and Position. There is a 'Person Type' section with checkboxes for Employees, Applicants, and Contingent Workers, and a 'Find' button. At the bottom is a table with columns: Full Name, Employee Number, Applicant Number, Contingent Worker Nu, and Organizati.

Full Name	Employee Number	Applicant Number	Contingent Worker Nu	Organizati

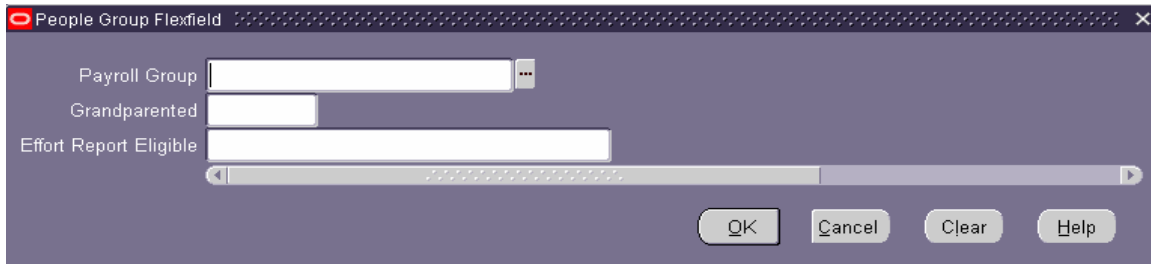
2. Click in the **ORGANIZATION** field.
3. Click on the **LOV** and look up the Organization. You can also enter the Organization number if known.

Note: If you know part of the Organization number, you can enter the number followed by the percent sign (%) wildcard.

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



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.*



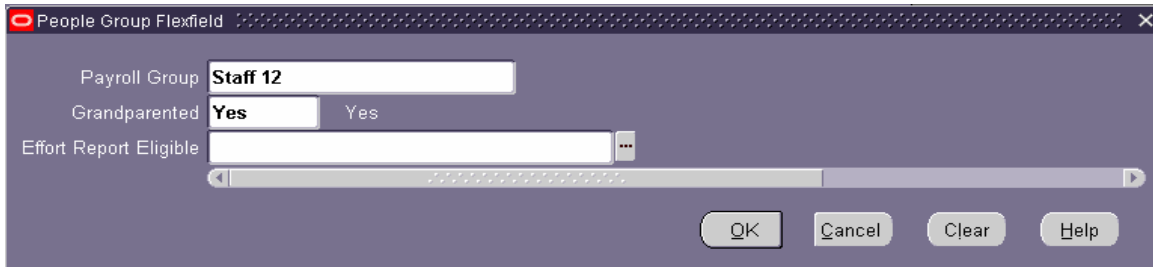
5. If you want to see a selected group of employees, click on the LOV for the **PAYROLL GROUP**. The **PAYROLL GROUP** list is the same list used in **ACT**. *You can skip this field if you want to view all employees.*



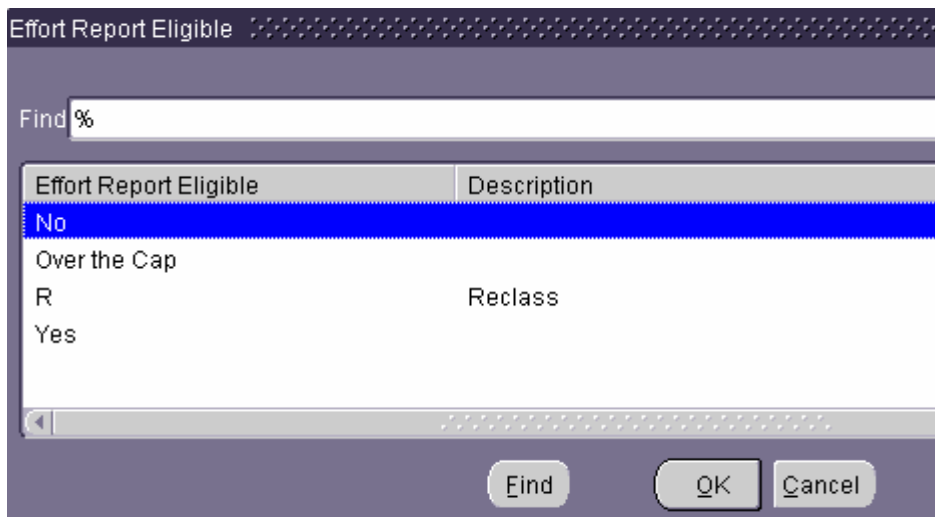
6. If you want to view the **GRANDPARENTED** employees, click inside the field. It will immediately return a **YES** answer. *You can skip this field if you want to view all employees.*

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

(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**.



Effort Report Eligible	Description
No	
Over the Cap	
R	Reclass
Yes	

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 analysis 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**: after locating the employee using the **ACT FIND WINDOW**, click on **DATA INQUIRY**. Once the **ACT MAIN FORM** opens, click the **ASSIGNMENT** button located at the bottom of the **ACT MAIN FORM**. The **UAB SCHEDULE** and **UAB GRADE** will display in the **GRADE** Field.

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

General Assignment Information			
Assignment Category	01 Regular FT	Job	AA313N0.Resource Support Spec
Status	Active Assignment	Grade	W.G12
Expected Return Date		Payroll Group	Staff 12
Organization	708450000 Resource Management	Timecard Dist Number	
Location	Bham Main Campus	Timekeeping Method	
Position	708450000.02401.031001	Timekeeping Organization	

The **first letter** identifies the **UAB Schedule** assigned to the employee; the **set of letter and numbers** following the period identifies the **UAB Grade**.

The Grade Flexfield dialog box contains two input fields: 'UAB Schedule' and 'UAB Grade'. Below these fields is a horizontal scrollbar. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

11. Click on the **UAB SCHEDULE LOV**. The list below will appear.

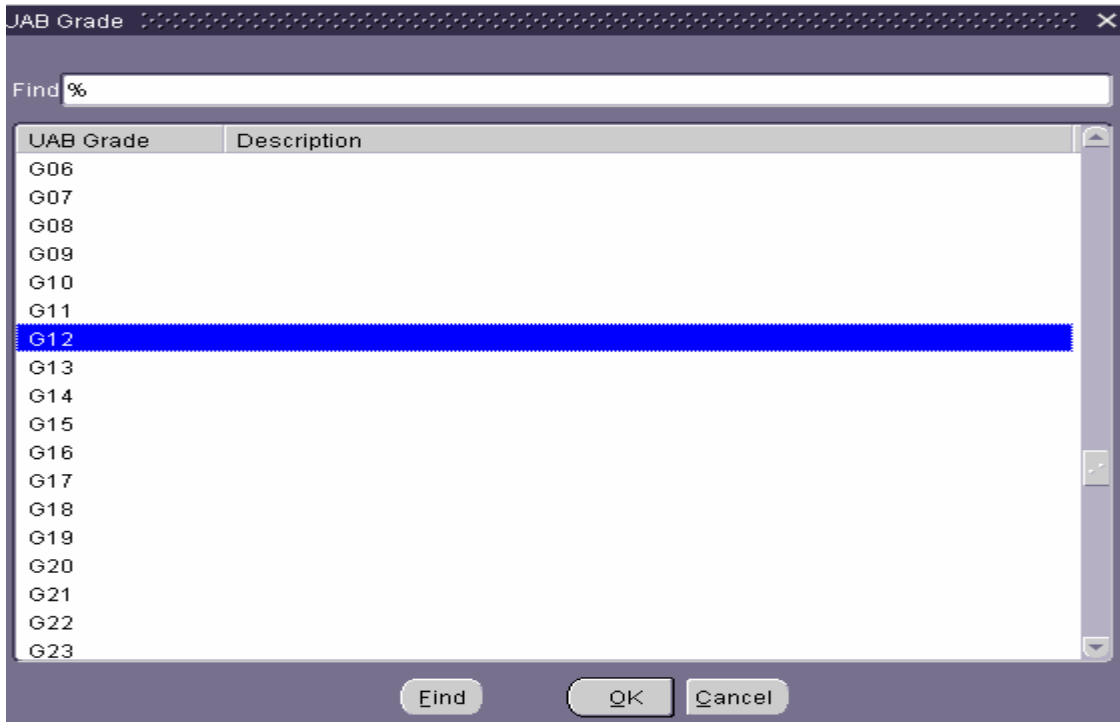
The UAB Schedule LOV dialog box features a search field labeled 'Find %' at the top. Below it is a table with two columns: 'UAB Schedule' and 'Description'. The 'A' row is highlighted in blue. At the bottom, there are three buttons: 'Find', 'OK', and 'Cancel'.

UAB Schedule	Description
A	Non Staff (Biweekly Open Range)
C	Faculty--MD Univ Component
E	Deans
F	Faculty--Medical Center
G	Faculty--9 Month Appointment
N	Residency Programs
O	Non Staff (Monthly Open Range)
U	Faculty--Academic Affairs
W	Staff

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.

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



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.

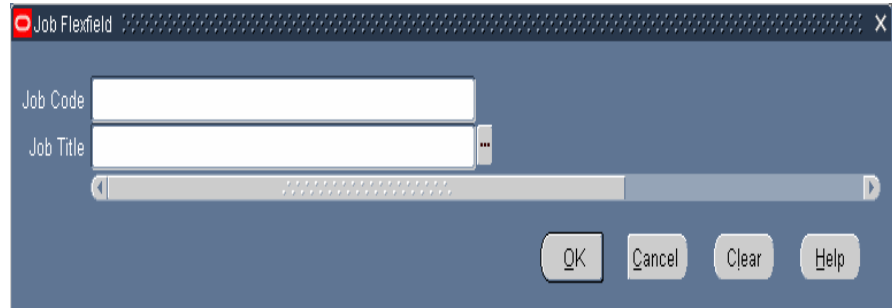


Appoint, Change, Terminate (ACT) Documentation Using the Assignment List

(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 Food and Nutrition, Staff 12 employee's with a W.R42 grade will appear in the list. This list will include both active and inactive assignments).

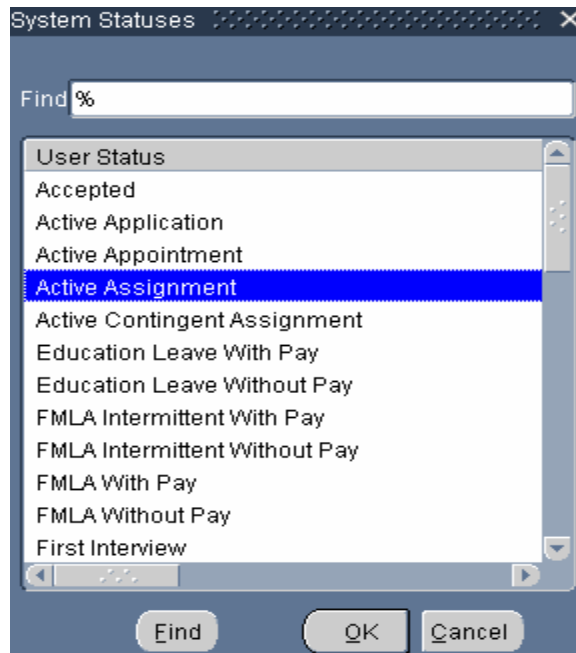
16. You may further refine the Assignment List by clicking in the following fields and selecting the desired parameters:

- **JOB**



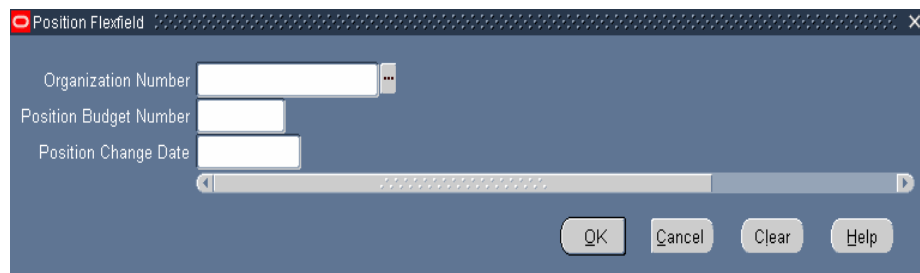
The screenshot shows the 'Job Flexfield' dialog box. It contains two input fields: 'Job Code' and 'Job Title'. Below these fields is a horizontal scrollbar. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

- **STATUS**



The screenshot shows the 'System Statuses' dialog box. It features a 'Find %' search field at the top. Below it is a list box containing various status options. The 'Active Assignment' option is currently selected and highlighted in blue. At the bottom, there are three buttons: 'Find', 'OK', and 'Cancel'.

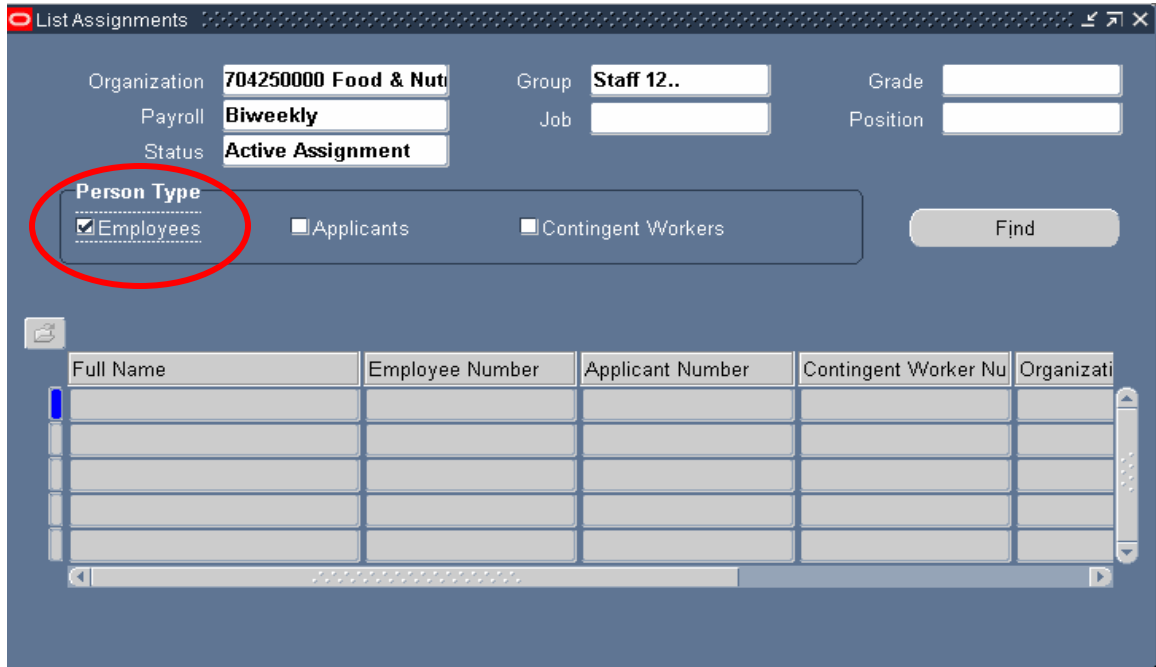
- **POSITION**



The screenshot shows the 'Position Flexfield' dialog box. It contains three input fields: 'Organization Number', 'Position Budget Number', and 'Position Change Date'. Below these fields is a horizontal scrollbar. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

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

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



The screenshot shows the 'List Assignments' window with the following search criteria:

- Organization: 704250000 Food & Nut
- Group: Staff 12..
- Grade: [Empty]
- Payroll: Biweekly
- Job: [Empty]
- Position: [Empty]
- Status: Active Assignment

The 'Person Type' section is highlighted with a red circle, showing the following options:

- Employees
- Applicants
- Contingent Workers

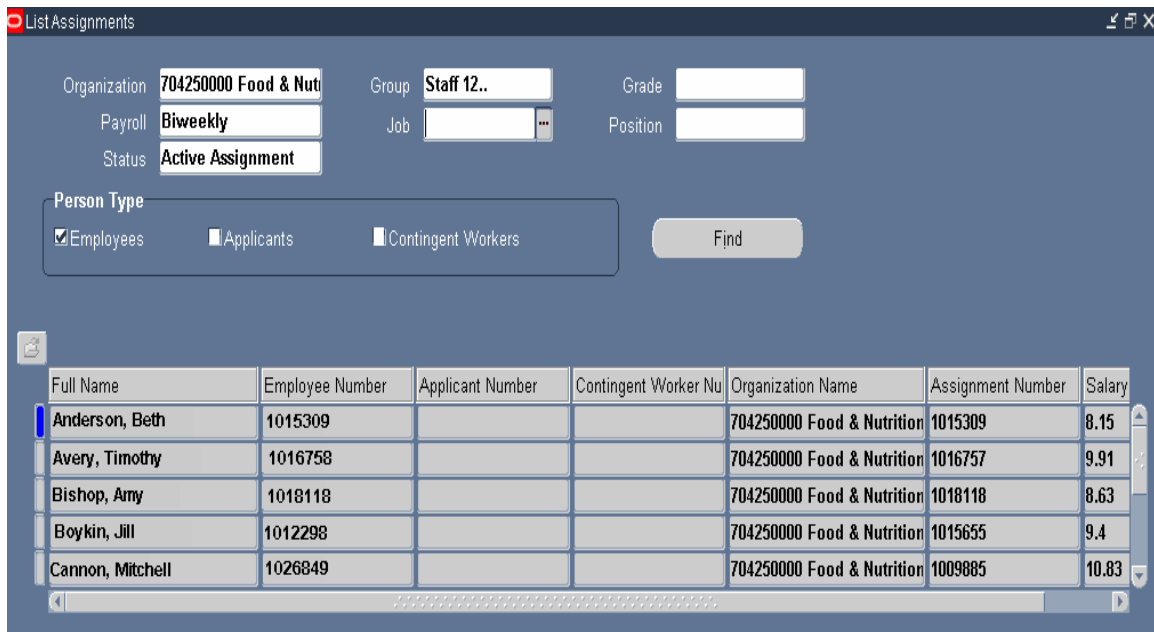
A 'Find' button is located to the right of the 'Person Type' section. Below the search criteria is an empty table with the following columns:

Full Name	Employee Number	Applicant Number	Contingent Worker Nu	Organizati

18. Before clicking on the **FIND** button, click in the **EMPLOYEES** option button to select only employees.

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.)



The screenshot shows the 'List Assignments' window with the same search criteria as the previous screenshot. The 'Person Type' section is still highlighted, and the 'Find' button is visible. Below the search criteria is a table with the following columns:

Full Name	Employee Number	Applicant Number	Contingent Worker Nu	Organization Name	Assignment Number	Salary
Anderson, Beth	1015309			704250000 Food & Nutrition	1015309	8.15
Avery, Timothy	1016758			704250000 Food & Nutrition	1016757	9.91
Bishop, Amy	1018118			704250000 Food & Nutrition	1018118	8.63
Boykin, Jill	1012298			704250000 Food & Nutrition	1015655	9.4
Cannon, Mitchell	1026849			704250000 Food & Nutrition	1009885	10.83






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

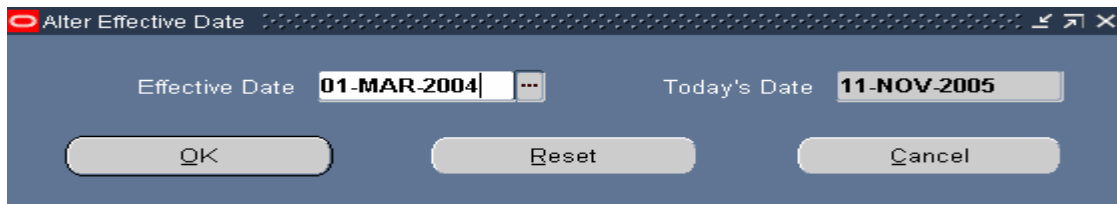
Once the search is complete, you may:

- 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 appears 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.

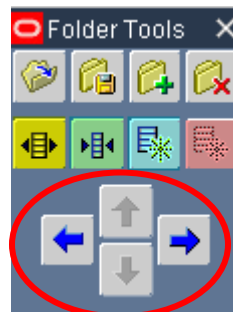


(The Effective Date field can be changed in order to specify a period in time. Using the above example, the Assignment Listing will display data as it appeared in the Administrative Systems on March 1, 2004. Changes made after that date will not be displayed.)

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 first row of icons are folder options.
- 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.

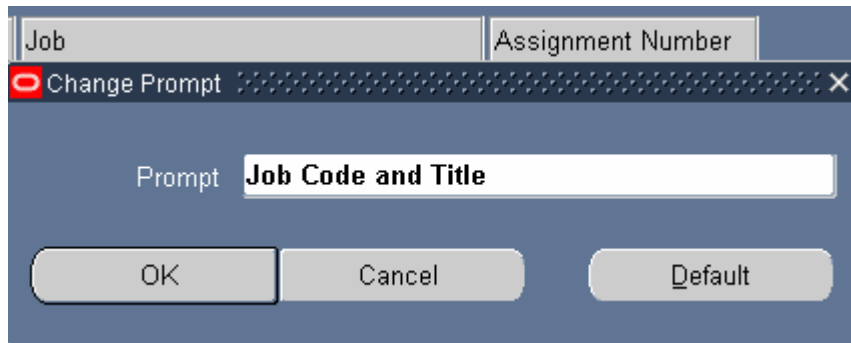


Appoint, Change, Terminate (ACT) Documentation Using the Assignment List

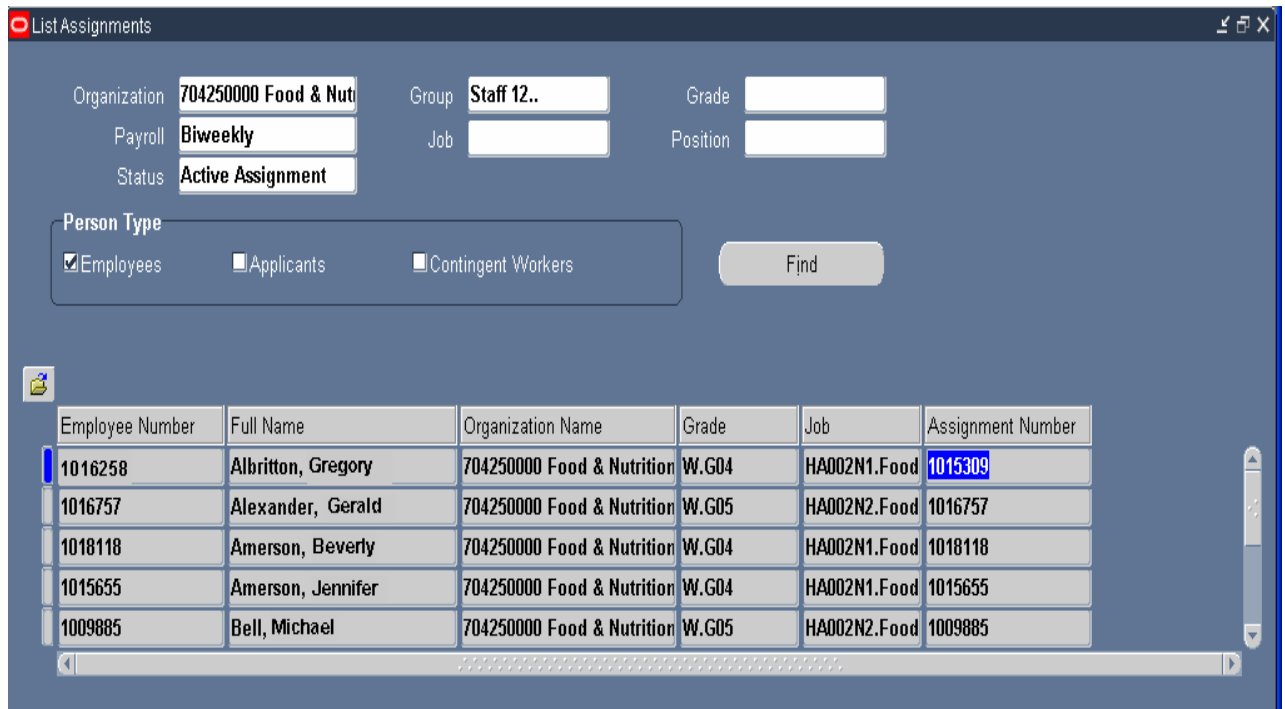
24. You can also use **FOLDER** on the Menu bar to display available tools.

Note: *The Assignments List online report works much like Microsoft Excel and Access. You can click in the report header (Full Name, Position, etc.), and drag the column to a new location. Columns can also be sorted according to your desired viewing preference.*

You may also right click in the report header and rename columns to better identify the column title



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



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

26. If your online report is displayed in the format you want, you may use the **printer icon** or go to **File, Print**.

The screenshot shows the 'List Assignments' window with the following search filters:

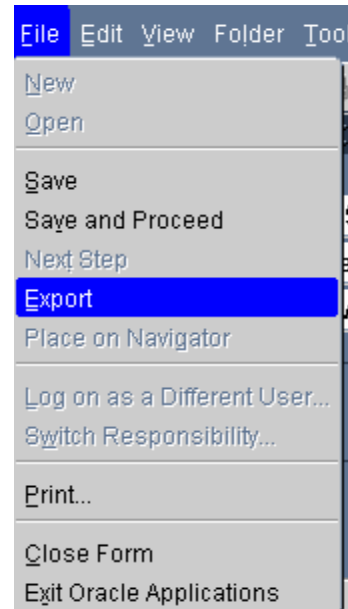
- Organization: 704250000 Food & Nut
- Group: Staff 12..
- Grade: [Empty]
- Payroll: Biweekly
- Job: [Empty]
- Position: [Empty]
- Status: Active Assignment

Person Type options: Employees, Applicants, Contingent Workers. A 'Find' button is also present.

Employee Number	Full Name	Organization Name	Grade	Job	Assignment Number
1016258	Albritton, Gregory	704250000 Food & Nutrition	W.G04	HA002N1.Food	1015309
1016757	Alexander, Gerald	704250000 Food & Nutrition	W.G05	HA002N2.Food	1016757
1018118	Amerson, Beverly	704250000 Food & Nutrition	W.G04	HA002N1.Food	1018118
1015655	Amerson, Jennifer	704250000 Food & Nutrition	W.G04	HA002N1.Food	1015655
1009885	Bell, Michael	704250000 Food & Nutrition	W.G05	HA002N2.Food	1009885

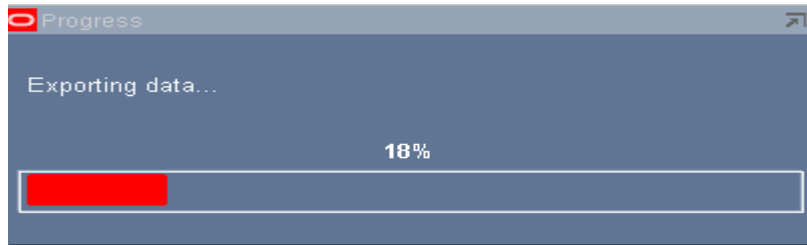
Note: If the scrollbar is displayed more information is contained in the report than what is displayed on the screen. Using the Printer Icon or File, Print option, **ONLY WHAT IS DISPLAYED ON YOUR SCREEN WILL PRINT**. In order to print **ALL** the information contained in the report, you will need to export the data to Excel or Access.

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

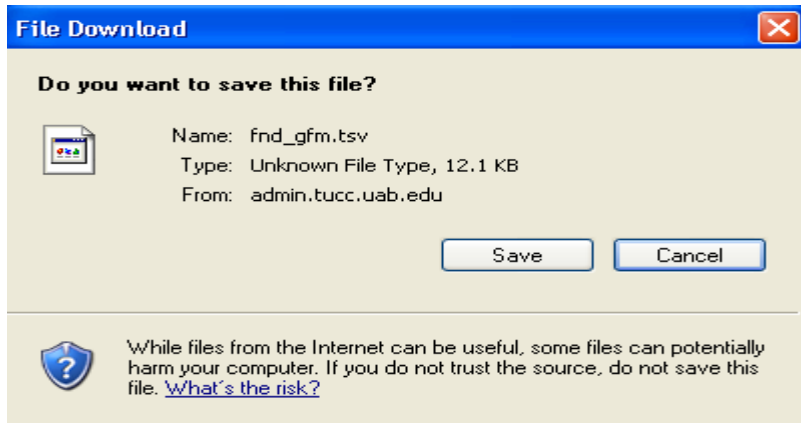


Appoint, Change, Terminate (ACT) Documentation Using the Assignment List

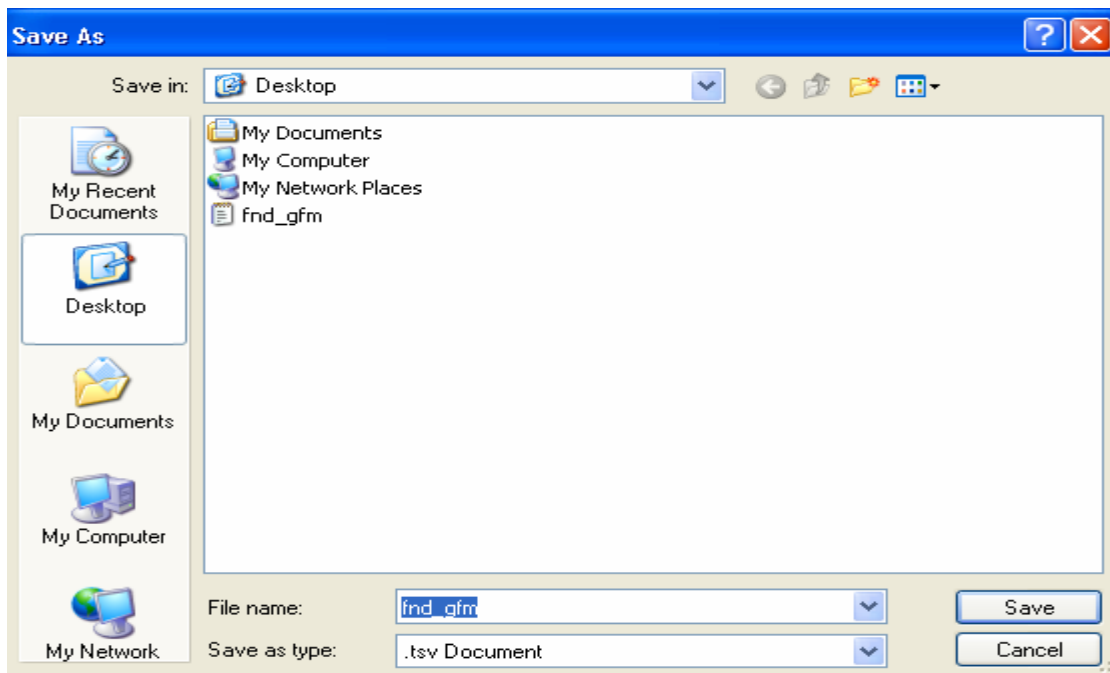
28. The following box will display while information is being exported.



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



30. 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.



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

31. 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.
32. Click on the **Save** button.
33. Open Excel or Access. 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.
34. Excel or Access will open a wizard that will assist you in performing the tab delimited import process.

[**RETURN TO TOP**](#)