

How to Run the Allocations Status by Assignment Report

1. Main Menu > Workforce Administration > Workforce Reports > Allocations Status by Assignm

2. Add a New Value

3. Run Control ID: Allocations_Status_by_Assignmt

4. Add

1. Navigate to: *Main Menu > Workforce Administration > Workforce Reports > Allocations Status by Assignmt*
2. Click the **Add a New Value** tab. (Only the first time you are setting up the report.)
3. Enter a **Run Control ID**. Name the report something unique that you will remember. You only need one **Run Control ID** for this report. There should be no spaces in the **Run Control ID**. Use (_) as a separator.

9. Run

5. Effective Date: 09/24/2014


6. Department: SDUSD

7. Resource From: Resource To: +

7. Job Code:

7. Sort Option: Department, Resource, JobCode


8. Save

4. Click the **Add** button.
 5. **Effective Date**. Defaults to current date. Enter a different date if you would like to see past or future allocations for your department.
 6. Enter your **Department Number**, or click the  to view a list of departments from which to choose.
 7. There are run control options for report selection and sorting criteria. For this example we will run by **Resource, Department, Job Code**.
- NOTE:** For a description of each option see box below screen shot.
8. Click **Save**. (Only the first time you are setting up your report.)

9. Click the **Run** button.

7 **Allocations Status by Assignment** report will show only those position numbers (and incumbents) where the department on the run control matches the department on the employee's assignment (Job Data). For each position the report will show all funding sources (100%).

Options for report selection and sorting criteria are:

- Ability to run report by one, many or range of resources. To run for one resource, enter the same resource in the “**Resource From**” and “**Resource To**” fields. To run for several resources, click the  button to add another resource or range of resources. Repeat as needed. To run for a range of resources, enter the first desired resource of the range in the “**Resource From**” field and the last desired resource in the range in the “**Resource To**” field. The resources you selected will be shown in the center of the report header; if more resources were selected than can be displayed in the report header due to space limitations, the last resource shown will be followed by “...” to indicate the report includes additional resources.
- Ability to sort report by Department, Resource, JobCode **OR** by JobCode **OR** by Resource, Department, JobCode
- At least **one** of the following criteria must be entered: **Department, Resource or Job Code**

10. Server Name: PSNT

11. OK

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Allocation Status by Assignmt	SDPM280	SQR Report	Web	PDF	Distribution

10. Select **PSNT** from the drop-down menu for **Server Name**.

11. Click the **OK** button.

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12. Note your **Process Instance** number and click the **Process Monitor** link.

13. Click the **Refresh** button to update the **Run Status**.
14. When **Run Status** becomes "Success" and **Distribution Status** becomes "Posted", click the **Details** link.

16. Click the **.PDF** link that contains the **Process Instance** number that you noted above. (Step 12)

15. Click the **View Log/Trace** link.

17. Your report will open in Adobe Acrobat Reader. Example shown below is the **Allocations Status by Assignment**, sorted by **Resource, Department, Job Code**. A **Salaried Position Summary by Resource** appears at the end of all salaried positions and before hourly positions are shown.

Type	Pos Num	Loc	Jobcode	Description	Used	Allocated	Balance	Dist	PTE	Dist	HCM Account Code	Resrc	Bud	Acct	Prog	Class	Fund	Ext	
Glry	A	30006478	0095A	6419 Attendance Asst	0.0000	0.5000	0.5000	0.5000	100.00%	00950001000240415000010000	00010	00	2404	2700	0000	01000	0000		
Glry	A	30003703	0095A	6450M Noon Duty Assistant	0.2125	0.2125	0.0000	0.2125	100.00%	00950001000290545000010000	00010	00	2905	8300	0000	01000	0000		
Glry	A	30003704	0095A	6450M Noon Duty Assistant	0.2125	0.2125	0.0000	0.2125	100.00%	00950001000290545000010000	00010	00	2905	8300	0000	01000	0000		
Glry	A	30003706	0095A	6450M Noon Duty Assistant	0.2125	0.2125	0.0000	0.2125	100.00%	00950001000290545000010000	00010	00	2905	8300	0000	01000	0000		
Glry	A	30003707	0095A	6450M Noon Duty Assistant	0.2125	0.2125	0.0000	0.2125	100.00%	00950001000290545000010000	00010	00	2905	8300	0000	01000	0000		
Glry	A	30003739	0095A	6450M Noon Duty Assistant	0.2125	0.2125	0.0000	0.2125	100.00%	00950001000290545000010000	00010	00	2905	8300	0000	01000	0000		
Glry	A	20009246	0095A	6535 Elementary School Asst	1.0000	1.0000	0.0000	1.0000	100.00%	00950001000240115000010000	00010	00	2401	2700	0000	01000	0000		
Totals for Resource: 00010					Used	Allocated	Balance												
					21.0625	27.5625	6.5000												
Glry	A	20009019	0095A	2025 Teacher-Bilingual Education	1.0000	0.0000	-1.0000	0.0000	100.00%	0095000150011070102010000	00015	00	1107	1000	1110	01000	0000		
Totals for Resource: 00015					Used	Allocated	Balance												
					1.0000	0.0000	-1.0000												

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