How to Run the Allocations Status by Assignment Report

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.

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.

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

11. Click the **OK** button.

Allocations Status by Assignmt

Run Control ID Allocations_Status_by_Assignmt   Report Manager   Process Monitor   **12**   Run

Process Instance:1351955

Effective Date 09/24/2014

Set ID: SDUSD

Department:

Resource   Find   First 1 of 1 Last
Resource From   Resource To

Job Code:

Sort Option: Resource, Department, JobCode

Save   Return to Search   Notify   Add   Update/Display

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

Process Detail

Process
Instance 1351955   Type SQR Report
Name SDPM280   Description Allocation Status by Assignmt
Run Status Success   Distribution Status Posted

Run   **Update Process**
Run Control ID Allocations_Status_by_Assignmt   ○ Hold Request
Location Server   ○ Queue Request
Server PSNT   ○ Cancel Request
Recurrence   ○ Delete Request
                                     ○ Restart Request

Date/Time   **Actions**
Request Created On 09/24/2014 10:23:41AM PDT   Parameters   Transfer
Run Anytime After 09/24/2014 10:21:12AM PDT   Message Log
Began Process At 09/24/2014 10:23:46AM PDT   Batch Timings
Ended Process At 09/24/2014 10:24:01AM PDT   View Log/Trace   **15**
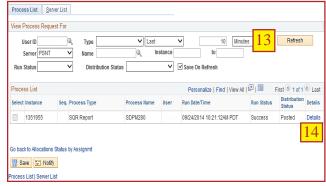
OK   Cancel

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

Process List | Server List

View Process Request For
User ID   Type   Last   10   **13**   Minutes   Refresh
Server PSNT   Name   Instance   to
Run Status   Distribution Status   ☑ Save On Refresh

Process List   Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	1351955		SQR Report	SDPM280		09/24/2014 10:21:12AM PDT	Success	Posted	Details

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Go back to Allocations Status by Assignmt

Save   Notify

Process List | Server List

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.

View Log/Trace

Report
Report ID: 923899   Process Instance: 1351955   Message Log
Name: SDPM280   Process Type: SQR Report
Run Status: Success

Allocation Status by Assignmt

Distribution Details
Distribution Node: PSREPORTS   Expiration Date: 10/01/2014

File List
Name	File Size (bytes)	Datetime Created
SDPM280_1351955.PDF **16**	23,066	09/24/2014 10:24:01.080000AM PDT
SDPM280_1351955.out	560	09/24/2014 10:24:01.080000AM PDT
SQR_SDPM280_1351955.log	1,731	09/24/2014 10:24:01.080000AM PDT

Distribute To
Distribution ID Type	*Distribution ID
User	

Return

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

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.

```
Report ID:  SDPM280                              PeopleSoft                          Page No.  3
Effective Date: 09/24/2014           ALLOCATIONS STATUS BY ASSIGNMENT                Run Date 09/24/2014
Order By: Resource, Department, JobCode  17       SAMPLE REPORT                      Run Time 10:23:46

                                         FTE/Head Cnt      Allocated
                                    ___Used___  _Allocated_ _Balance_ _DistFTE_ _Dist%_ HCM Account Code      Resrc Bud  Acct  Prog  Class  Fund  Ext
Type    Pos Num  Loc  Jobcode Description  Status      Name        Class Indc
        117082   0   1.0000   Active      Chris Doe       L 10 Y

Slry  A  30006478 0095A  6419 Attendance Asst    0.0000  0.5000  0.5000  0.5000  100.0%  00950001000240415000100000 00010 00  2404 2700 0000  01000 0000

Slry  A  30003703 0095A  6450M Noon Duty Assistant  0.2125  0.2125  0.0000  0.2125  100.0%  00950001000290545000100000 00010 00  2905 8300 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        154866   0   0.2125  Active      Chris Doe       L 10 Y

Slry  A  30003704 0095A  6450M Noon Duty Assistant  0.2125  0.2125  0.0000  0.2125  100.0%  00950001000290545000100000 00010 00  2905 8300 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        127127   0   0.2125  Active      Chris Doe       L 10 Y

Slry  A  30003706 0095A  6450M Noon Duty Assistant  0.2125  0.2125  0.0000  0.2125  100.0%  00950001000290545000100000 00010 00  2905 8300 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        127853   0   0.2125  Active      Chris Doe       L 10 Y

Slry  A  30003707 0095A  6450M Noon Duty Assistant  0.2125  0.2125  0.0000  0.2125  100.0%  00950001000290545000100000 00010 00  2905 8300 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        128947   0   0.2125  Active      Chris Doe       L 10 Y

Slry  A  30003739 0095A  6450M Noon Duty Assistant  0.2125  0.2125  0.0000  0.2125  100.0%  00950001000290545000100000 00010 00  2905 8300 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        129760   0   0.2125  Active      Chris Doe       L 10 Y

Slry  A  20009246 0095A  6535 Elementary School Asst  1.0000  1.0000  0.0000  1.0000  100.0%  00950001000240115000100000 00010 00  2401 2700 0000  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        126042   0   1.0000  Active      Chris Doe       L 10 Y

              Totals for Resource: 00010   Used      Allocated  Balance
                                         21.0625   27.5625   6.5000

Slry  A  20009019 0095A  2025 Teacher-Bilingual Education  1.0000  0.0000  -1.0000  0.0000  100.0%  00950001500110701020100000 00015 00  1107 1000 1110  01000 0000
        ID       Rcd  PTE    Status      Name        Class Indc
        123020   0   1.0000  Active      Chris Doe       C 10 Y

              Totals for Resource: 00015   Used      Allocated  Balance
                                          1.0000    0.0000   -1.0000
```