

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.

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.

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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

Process List Server List

View Process Request For

User ID Type Last Minutes **13** Refresh

Server PSNT Name Instance to

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1351955		SQR Report	SDPM280		09/24/2014 10:21:12AM PDT	Success	Posted	14

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.

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

Location Server

Server PSNT

Recurrence

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

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)

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.

Report ID: SDPM280
Effective Date: 09/24/2014
Order By: Resource, Department, JobCode **17**

PeopleSoft
ALLOCATIONS STATUS BY ASSIGNMENT
SAMPLE REPORT

Page No. 3
Run Date 09/24/2014
Run Time 10:23:46

Type	Pos Num	Loc	Jobcode	Description	Used	Allocated	Balance	Dist	PTE	Dist	HCM Account Code	Resrc	Bud	Acct	Prog	Class	Fund	Ext	
	117082		0	1.0000	Active														
Elry A	30006478	0095A	6419	Attendance Asst	0.0000	0.5000	0.5000	0.5000	100.00%	00950001000240415000010000	00010	00	2404	2700	0000	01000	0000		
Elry 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		
	154866		0	0.2125	Active														
Elry 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		
	127127		0	0.2125	Active														
Elry 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		
	127853		0	0.2125	Active														
Elry 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		
	128947		0	0.2125	Active														
Elry 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		
	129760		0	0.2125	Active														
Elry 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		
	126042		0	1.0000	Active														
Totals for Resource: 00010					Used	Allocated	Balance												
					21.0625	27.5625	6.5000												
Elry 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		
	123020		0	1.0000	Active														
Totals for Resource: 00015					Used	Allocated	Balance												
					1.0000	0.0000	-1.0000												