How to Run the Allocations Status by Assignment Report

1. Navigate to: Main Menu > Workforce Administration > Workforce Reports > Allocations Status by Assignment

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.

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 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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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.

15. Click the View Log/Trace link.

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.