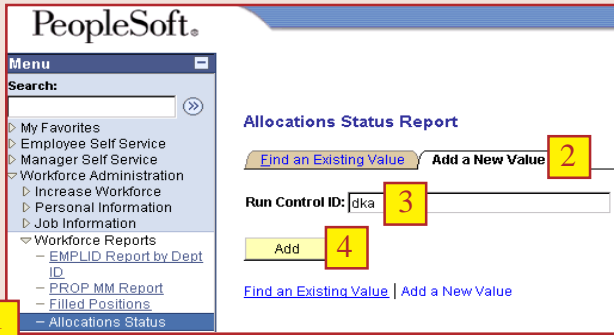


How to Run the Allocations Status Report

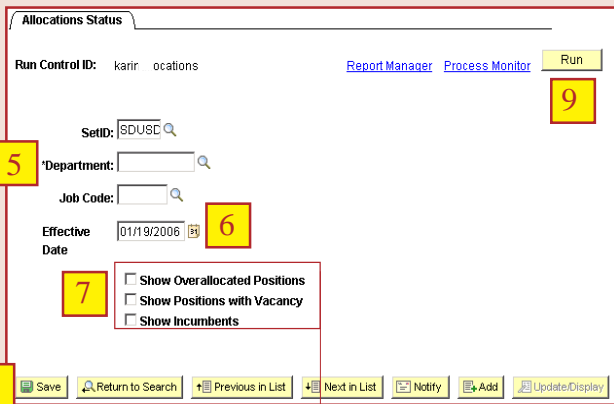


1. Navigate to: *Workforce Administration > Workforce Reports > Allocations Status*

2. Click on the **Add a New Value** tab.

3. Enter a **Run Control ID**. Name the report something unique that you will remember. You only need one Run Control ID. **Do not** keep clicking on Add a New Value Tab each time you run a report.

4. Click the **Add** button.



5. Enter your **Department Number**, or click the  to view a list of departments from which to choose.

6. **Effective Date**. Defaults to current date. Enter an effective date if you would like to see future vacancies for your department.

7. Leave the **Show Overallocated Positions** and **Show Positions with Vacancy** checkboxes unselected to return all positions for the Department selected above.

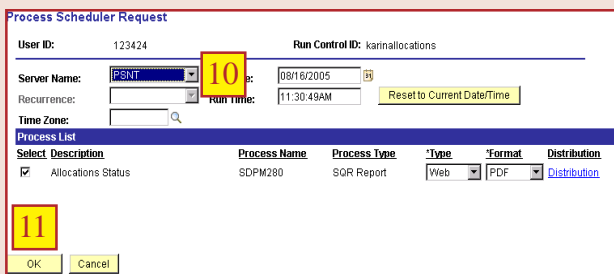
8. Click **Save**. (Only the first time you are setting up your report.)

9. Click the **Run** button.

Select **Show Overallocated Positions** to return only those positions that have an FTE balance of *less than zero*.

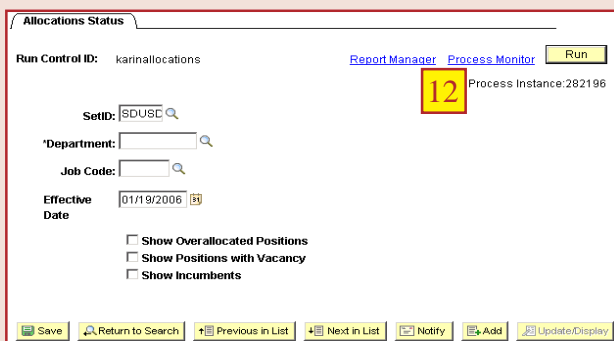
Select **Show Positions with Vacancy** to return only those positions that have an FTE balance of *greater than zero*.

Select **Show Incumbents** to include the employees attached to the positions that show up on the report (*this checkbox may be used with any combination of the above checkboxes*).



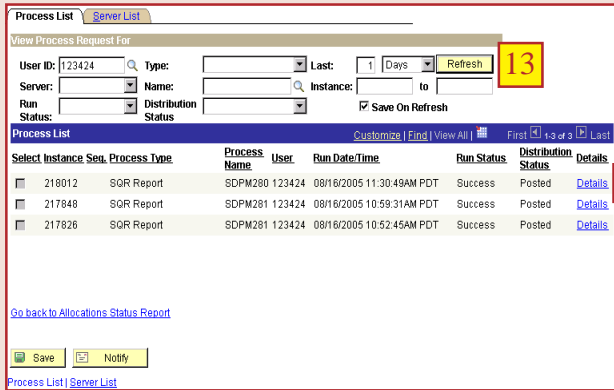
10. Select **PSNT** from the drop-down menu for **Server Name**.

11. Click the **OK** button.

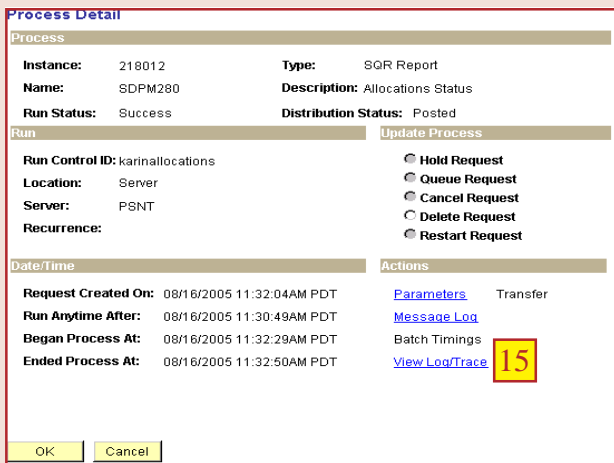


12. Note your **Process Instance** number and click the **Process Monitor** link.

How to Run the Allocations Status Report



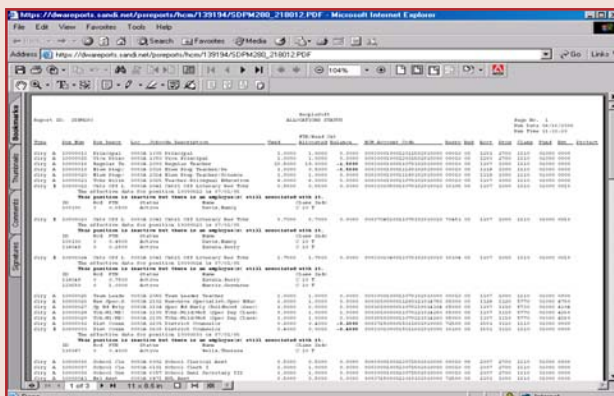
- Click the **Refresh** button to update the **Run Status**.
- When **Run Status** becomes “Success” and **Distribution Status** becomes “Posted”, click the **Details** link.



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



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



- Your report will open in Adobe Acrobat Reader.

Allocations Status Report

Report ID: SDFM280
Effective Date: 07/01/2006

PeopleSoft
ALLOCATIONS STATUS
9999A Sample School

Run Date 06/14/2006
Run Time 11:11:04

HCM Account Code (Combo Code)

Type	Pos Num	Pos Descr	Loc	Jobcode Description	Used	FTE/Head Cnt Allocated Balance	HCM Account Code	Rearc Bud	Acct	Prog	Class	Fund	Ext	Project
Slry I	10014231	Network Sy	0350A	6703 Network Sys Techn	0.6250	0.0000 -0.6250	0350301000023151502010000	30100 00	2315	2700	1110	01000	0000	
The effective date for position 10014231 is 07/01/06 This position is inactive but there is an employee(s) still associated with it.														
	ID	Rcd	FTE	Status	Name	Class Indc								
	123456	0	0.6250	Leave of Absence	Doe.Jane	L 10 T								
Slry A	10014698	Avid Asst	0350A	6489 Avid Asst	0.3750	0.3000		11602 73945 00	2101	1000	1110	01000	1602	
	ID	Rcd	FTE	Status	Name	Class Indc								
	357854	0	0.3750	Active	Doe.John	L 10 T								
Slry A	10014699	Avid Asst	0350A	6489 Avid Asst	0.7500	0.0000 -0.7500	0350008000021010102010000	00800 00	2101	1000	1110	01000	0000	
	ID	Rcd	FTE	Status	Name	Class Indc								
	357951	0	0.3750	Active	Jones.James	L 10 T								
	559357	0	0.3750	Active	Smith.Sally	L 10 T								
Slry A	10014742	Regular Te	0350A	2000 Regular Teacher	0.8000		011070102011602 73945 00	1107	1000	1110	01000	1602		
	ID	Rcd	FTE	Status	Name	Class Indc								
	554153	0	0.6000	Active	Jones.Jane	C 1								
				Active	Smith.Sam	C 10 T								

If you find that you are overallocated or have an inactive position(s), you may:

1. Complete a Change Position Attributes PAR to request a position allocation change.
2. Complete an Assignment Change PAR to transfer someone out of the overallocated or inactive position.
3. Contact your Budget Analyst.