

Add ChartField Strings for a New Position Pool ID

The PayServ **Department Budget Table USA** is used to maintain position pool funding. Agency users can use the Department Budget Table to assign ChartField strings to new Position Pool IDs.

- To add ChartField strings to a new Position Pool ID, **Set Up HCM> Product Related> Commitment Accounting> Budget Information> Department Budget Table USA**.
- Click the Add a New Value button on the top of the page.
- Enter the **Department (1)**, **Fiscal Year (2)**, select Position Pool ID from the **Budget Level (3)** drop-down menu if not already defaulted in, and enter the new **Position Pool ID (4)**.
- Click **Add (5)**.

Department Budget Table USA

Find an Existing Value

[⊕ Add a New Value](#)

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches **Saved Searches** Choose from saved searches

**Set ID =

Department begins with

Fiscal Year =

Budget Level =

Position Pool ID begins with

Job Code Set ID begins with

Job Code begins with

Position Number begins with

Empl ID begins with

Empl Record =

Include History Correct History

Department Budget Table USA

Add a New Value

Find an Existing Value

*Set ID

*Department **1**

*Fiscal Year **2**

*Budget Level **3**

Position Pool ID **4**

Job Code Set ID

Job Code

Position Number

Empl ID

Empl Record

5

- The Department Budget Date page is displayed.
- Select the Department **Dept Budget Earnings (6)** tab – this is where you will now assign all Position Pool IDs to the ChartField strings currently mapped on the Chart of Accounts profile in the Statewide Financial System (SFS).

Dept Budget Date Dept Budget Defaults **Dept Budget Earnings** Dept Budget Deductions Dept Budget Taxes

Set ID SHARE Department 02000 OSC Fiscal Year 2024

Budget Begin Date 03/18/2024 Offset Group 99999

Budget End Date 03/17/2025

Budget Cap

Per Budget Level Per Earn/Tax/Ded

Level | < | > | 1 of 1 | View All

Department Position Pool Jobcode Position Appointment

Position Pool ID 007 STAFF SUPPORT BUFFALO

*Effective Date 03/18/2024 Eff Seq 0 *Status Active

Budget Level Cap 0.00 *Currency USD

Date Entered 03/21/2024

Earnings Distribution

Accounting Budgetary ChartFields Project ChartFields Optional ChartFields

	Distribution %	Funding End Date	Update ChartFields	Distributed		
1	100.000	8	Update ChartFields 9	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

The **Effective Date (7)** defaults to the next pay period begin date for your agency, but must be the same Effective Date used for the new Position Pool. Adjust the **Effective Date (7)** if necessary (only pay period beginning dates will be available to use).

- Set the **Distribution % (8)** - This value will must equal 100%.
- Click the **Update ChartFields (9)** hyperlink to view the ChartField Details page.
- The Chartfield Details page is displayed.

ChartField Details

The screenshot shows the 'ChartField Details' form with several sections and callouts:

- Business Unit:** A text input field containing 'DSC01' with a search icon, labeled with a red arrow and the number 10.
- Search Options:** A section with a radio button for 'Combination Codes' and a 'Search' button, labeled with a red arrow and the number 14.
- Budgetary ChartFields (11):** A table with columns: *Department (3050206), Account (50101), *Program Code (12762), *Fund Code (10050), and *Budget Reference (2024-25).
- Project ChartFields (12):** A table with columns: Business Unit PC, Project/Grant, Activity ID, Resource Type, Resource Category, and Resource Sub-Category.
- Optional ChartFields (13):** A table with columns: Operating Unit, Class Field, Affiliate, Fund Affiliate, Chartfield 1, Chartfield 2, Chartfield 3, and Product.
- Buttons:** 'Ok' and 'Cancel' buttons at the bottom, with the 'Ok' button labeled with a red arrow and the number 17.

- Enter your **Business Unit (10)**.
- Enter the ChartField values as provided to you by your Budget or Human Resources Office:
 - The following values are required chartfields and must be entered in order to save the record.
 - **Budgetary Chartfields (11)**
 - Department
 - Account
 - Program Code
 - Fund Code
 - Budget Reference
 - **Project Chartfields (12)**
 - Business Unit PC – *Required only if using a Project /Grant*
 - Project /Grant – *Required only if using Project /Grant*
 - Activity ID – *Required only if using a Project /Grant*
 - The following values are optional chartfields and are only used for agency reporting needs.
 - **Optional Chartfields (13)**

- Operating Unit
 - Class Field
 - Affiliate
 - Fund Affiliate
 - Chartfield 1
 - Chartfield 2
 - Chartfield 3
 - Product
- Use the Lookup feature on each individual field to view available values, if needed.
 - If you do not need to look up additional valid chartfield strings, you can click **OK (17)** to continue back to the Dept Budget Earnings page.
- Use the **Search (14)** feature to lookup any other combinations that are available to use (if needed).
 - The Search Combination Codes page is displayed.
 - The below illustration is where you will be able to include any combinations of chartfield values and **Search (15)** to get a list of valid strings.
 - Click **Select (16)** next to any of the codes you would like to use and they will populate into the Chartfield Details page.

Search Combination Codes

Combination Code

Search by ChartFields

Department	<input type="text" value="3050206"/>	Affiliate	<input type="text"/>	Project/Grant	<input type="text"/>
Account	<input type="text" value="50101"/>	Fund Affiliate	<input type="text"/>	Activity ID	<input type="text"/>
Program Code	<input type="text" value="12762"/>	Product	<input type="text"/>	Resource Type	<input type="text"/>
Fund Code	<input type="text" value="10050"/>	Chartfield 1	<input type="text"/>	Resource Category	<input type="text"/>
Budget Reference	<input type="text" value="2024-25"/>	Chartfield 2	<input type="text"/>	Resource Sub-Category	<input type="text"/>
Operating Unit	<input type="text"/>	Chartfield 3	<input type="text"/>		
Class Field	<input type="text"/>	Business Unit PC	<input type="text"/>		

15 →

Combination Code / ChartFields

	Select 16	Combo Code	Account	Department	Project/Grant	Product	Fund Code
1	<input type="button" value="Select"/>	OSC010000218307	50101	3050206			10050

- The Chartfield Details page is displayed.
- Click **Ok (17)**. The ChartField string will be validated in PayServ. If the string does not exist in PayServ it will be validated in SFS. An error message will display if the ChartField string is invalid.

ChartField Details

Business Unit:

Search Options

Combination Codes

Budgetary ChartFields

*Department	Account	*Program Code	*Fund Code	*Budget Reference
<input type="text" value="3050206"/> <input type="button" value="Q"/>	<input type="text" value="50101"/> <input type="button" value="Q"/>	<input type="text" value="12762"/> <input type="button" value="Q"/>	<input type="text" value="10050"/> <input type="button" value="Q"/>	<input type="text" value="2024-25"/> <input type="button" value="Q"/>

Project ChartFields

Business Unit PC	Project/Grant	Activity ID	Resource Type	Resource Category	Resource Sub-Category
<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

Optional ChartFields

Operating Unit	Class Field	Affiliate	Fund Affiliate	Chartfield 1	Chartfield 2	Chartfield 3	Product
<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

- The Department Budget Earnings page is displayed.
- If you only need one chartfield string for that Position Pool, click **Save (18)** on the Department Budget Earnings record for the new effective date. If you need more than one chartfield string for that Position Pool, do not save and proceed with the next steps.
- The Dept Budget Earnings page is displayed.

Dept Budget Date Dept Budget Defaults **Dept Budget Earnings** Dept Budget Deductions Dept Budget Taxes

Set ID SHARE Department 02000 OSC Fiscal Year 2024

Budget Begin Date 03/18/2024 Offset Group 99999 **Budget Cap**

Budget End Date 03/17/2025 Per Budget Level Per Earn/Tax/Ded

Level | < > | 1 of 1 | View All

Department Position Pool Jobcode Position Appointment

Position Pool ID 007 STAFF SUPPORT BUFFALO *Effective Date 03/18/2024 Eff Seq 0 *Status Active Date Entered 03/21/2024

Budget Level Cap *Currency USD

Earnings Distribution | < > | 1-1 of 1

Accounting Budgetary ChartFields Project ChartFields Optional ChartFields

	Distribution %	Funding End Date	Update ChartFields	Distributed
1	<input type="text" value="18"/> 100.000		Update ChartFields	<input type="checkbox"/>

You can now split the **Distribution %** into up to 8 splits. Each split can be assigned its own ChartField strings, as outlined above, but the total **Distribution % (20)** for all rows (1-8) must add up to 100%.

- Click the plus sign to add additional splits.

Dept Budget Date Dept Budget Defaults **Dept Budget Earnings** Dept Budget Deductions Dept Budget Taxes

Set ID SHARE Department 02000 OSC Fiscal Year 2024

Budget Begin Date 03/18/2024 Offset Group 99999 **Budget Cap**

Budget End Date 03/17/2025 Per Budget Level Per Earn/Tax/Ded

Level | < | > | 1 of 2 | > | > | View All

Department Position Pool Jobcode Position Appointment + -

Position Pool ID 007 STAFF SUPPORT BUFFALO *Effective Date 07/04/2024 Eff Seq 0 *Status Active Date Entered 10/18/2024

Budget Level Cap 0.00 *Currency USD

Earnings Distribution < | > | 1-7 of 7 | > | > |

Accounting Budgetary ChartFields Project ChartFields Optional ChartFields ||>

	Distribution %	Funding End Date	Update ChartFields	Distributed		
1	40.000		Update ChartFields	<input type="checkbox"/>	+ -	
2	10.000		Update ChartFields	<input type="checkbox"/>	+ -	
3	10.000		Update ChartFields	<input type="checkbox"/>	+ -	
4	10.000		Update ChartFields	<input type="checkbox"/>	+ -	
5	10.000		Update ChartFields	<input type="checkbox"/>	+ -	
6	10.000		Update ChartFields	<input type="checkbox"/>	+ -	
7	10.000		Update ChartFields	<input type="checkbox"/>	+ -	

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

- Be sure to **Save (21)** your changes before leaving this page.
- **Once the record is saved, you will not be able to make any changes to that record for that effective date.**