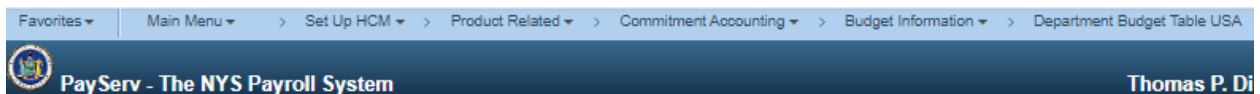


## Add ChartField Strings for a New Position Pool ID

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](#) hyperlink or tab 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

A screenshot of the "Department Budget Table USA" form. At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". The form contains several input fields and a dropdown menu, each with a red arrow and a number pointing to it:

- \*Set ID: Text box containing "SHARE".
- \*Department: Text box containing "02000", with a red arrow labeled "1" pointing to it.
- \*Fiscal Year: Text box containing "2024", with a red arrow labeled "2" pointing to it.
- \*Budget Level: Dropdown menu showing "Position Pool ID", with a red arrow labeled "3" pointing to it.
- Position Pool ID: Text box containing "OSC", with a red arrow labeled "4" pointing to it.
- Job Code Set ID: Text box.
- Job Code: Text box.
- Position Number: Text box.
- Empl ID: Text box.
- Empl Record: Text box containing "0".
- At the bottom left, there is a blue "Add" button with a red arrow labeled "5" pointing to it.

- 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).

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. At the top, there is a 'Business Unit' field containing 'OSC01' with a search icon, indicated by a red arrow and the number 10. To the right is a 'Search Options' section with a radio button for 'Combination Codes' and a 'Search' button, indicated by a red arrow and the number 14. Below these are three main sections, each with a red arrow and a number:

- Budgetary ChartFields (11):** A table with columns: \*Department (3000214), Account (50101), \*Program Code (10999), \*Fund Code (25006), 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.

At the bottom of the form are 'Ok' and 'Cancel' buttons, with a red arrow and the number 17 pointing to the 'Ok' button.

- 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	3000214	Affiliate		Project/Grant	
Account	50101	Fund Affiliate		Activity ID	
Program Code	10999	Product		Resource Type	
Fund Code	25006	Chartfield 1		Resource Category	
Budget Reference		Chartfield 2		Resource Sub-Category	
Operating Unit		Chartfield 3			
Class Field		Business Unit PC			

**15** →

**Combination Code / ChartFields**

	Select	Combo Code	Account	Department	Project/Grant	Product	Fund Code
1	<input type="button" value="Select"/>	AGM010000000177	50101	3000214	1482360982CA		25006
2	<input type="button" value="Select"/>	AGM010000000178	50101	3000214	1582360184CA		25006
3	<input type="button" value="Select"/>	AGM010000008132	50101	3000214	1482360245CA		25006

**16** →

- 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="3000214"/>	<input type="text" value="50101"/>	<input type="text" value="10999"/>	<input type="text" value="25006"/>	<input type="text" value="2024-25"/>

### Project ChartFields

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

### Optional ChartFields

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

17

- 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 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: 001 | EXECUTIVE/FIRST DEPUTY | \*Status: Active

\*Effective Date: 12/21/2023 | Eff Seq: 0 | \*Currency: USD

Budget Level Cap: 0.00 | Date Entered: 04/26/2024

### Earnings Distribution

Accounting	Budgetary ChartFields	Project ChartFields	Optional ChartFields
1	100.00%	Funding End Date	Update ChartFields
			Distributed
			<input type="checkbox"/>

18

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
 Per Budget Level
  Per Earn/Tax/Ded

Budget End Date 03/17/2025

Level
1 of 1
View All

Department
 Position Pool
 Jobcode
 Position
 Appointment

Position Pool ID 001
EXECUTIVE/FIRST DEPUTY

\*Effective Date 12/21/2023
Eff Seq 0
\*Status Active
Date Entered 04/26/2024

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
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.**