

Review & Modify Existing Position Pools

The PayServ conversion to the SFS Chart of Accounts has resulted in changes to the information available on the **Position Pool Table** in PayServ. The Legacy Cost Center, Budget Year and Split Percent are no longer captured on this page. This page will now only be used to update position pool effective dates and descriptions and to add new position pools.

- To review the **Position Pool Table** go to **Set Up HRMS> Product Related> Commitment Accounting> Budget Information> Position Pool Table**.
- Enter the **Department (1)** and the **Position Pool ID (2)**. The **Lookup feature (3)** displays all Departments available to the user.
- Click **Search (4)**.

The screenshot shows the 'Position Pool Table' search interface. At the top, a breadcrumb trail reads: 'Favorites > Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Position Pool Table'. Below this is the title 'Position Pool Table' and the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. A 'Search Criteria' section is expanded, showing four search fields: 'Set ID:' with a dropdown set to '=' and a text box containing 'SHARE' (marked with a red '1' and a magnifying glass icon); 'Department:' with a dropdown set to 'begins with' and a text box containing '02000' (marked with a red '2' and a magnifying glass icon); 'Position Pool ID:' with a dropdown set to 'begins with' and a text box containing 'OSC' (marked with a red '2' and a magnifying glass icon); and 'Description:' with a dropdown set to 'begins with' and an empty text box. A red arrow labeled '3' points to the magnifying glass icons, with the text 'Lookup Feature' next to it. Below the search fields is a checkbox for 'Include History' and a text box for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom of the search criteria are buttons for 'Search' (marked with a red '4' and an arrow), 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page are the links 'Find an Existing Value' and 'Add a New Value'.

- The Position Pool Table is displayed.
- To update the Position Pool effective date and change the description of a Position Pool click the **plus sign (5)** to add a row.

Position Pool Table

Set ID: SHARE
 Department: 02000 OSC
 Position Pool ID: OSC

Position Pool Find | View All First 1 of 1 Last

*Effective Date: 05/07/2015 *Status: Active **5**

*Description: OSC SAMPLE POOL

Short Description: OSC POOL

- The **Effective Date (6)** field defaults to the current date. Change it to reflect the first date of the pay period for the next unconfirmed check date.
- Change the **Description (7)** and **Short Description (8)** fields.

Position Pool Table

Set ID: SHARE
 Department: 02000 OSC
 Position Pool ID: OSC

Position Pool Find | View All First 1 of 2 Last

*Effective Date: 05/20/2015 **6** *Status: Active

*Description: OSC VALID **7**

Short Description: OSC VALID **8**

9

Save Add Update/Display Include History

- **Save (9)** the changes. The position pool description is now updated.