



Subject: SDSU DEPARTMENTAL POOL ID QUERY PROCEDURES

Department: Budget & Finance

Date: May 2011

SD_PM_POOL_ID Query:

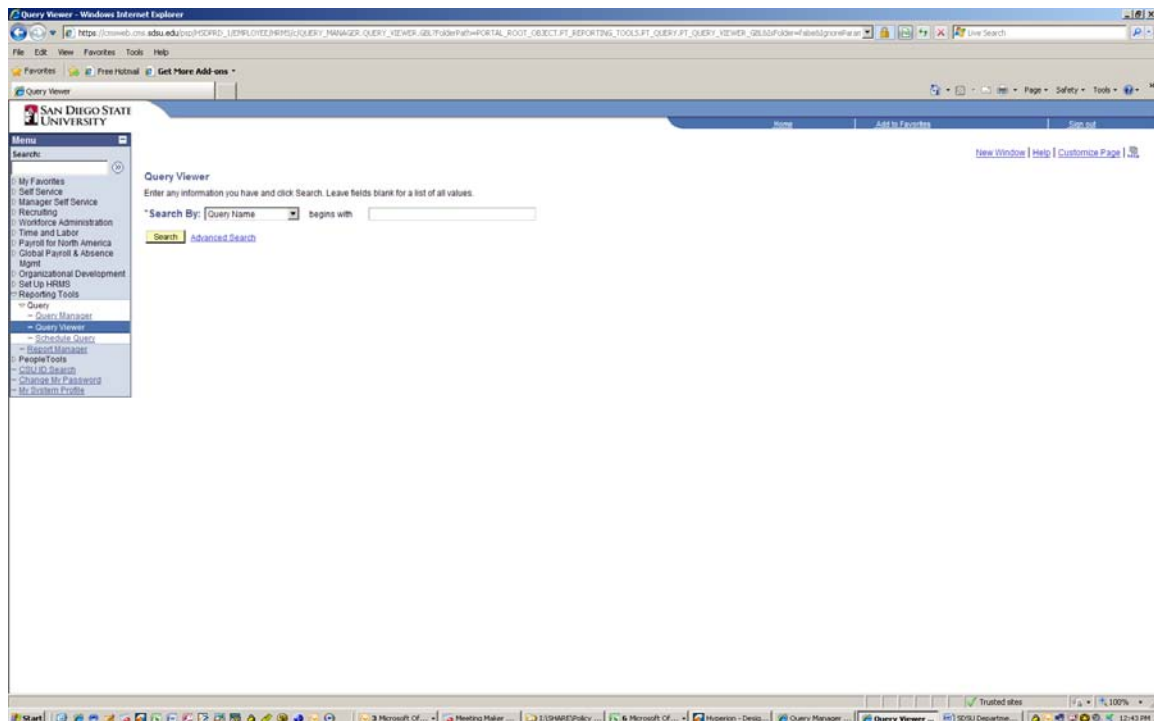
The SD_PM_POOL_ID query is a tool available to departmental/divisional coordinators to assist in managing position data and position funding sources. A Pool ID is assigned to most HCM position numbers. A Pool ID is specific to a Department ID and is used to link a position to a funding source during the Labor Cost Distribution (LCD) process. The SD_PM_POOL_ID query provides users on demand access to a list of all active Pool IDs for their department(s). This information is particularly useful when completing Position Action Request (PAR) forms.

Users must be granted access to run queries in PeopleSoft. If you do not currently have access to PeopleSoft, please complete and submit an [SDSU HCM Account Access Request form](#).

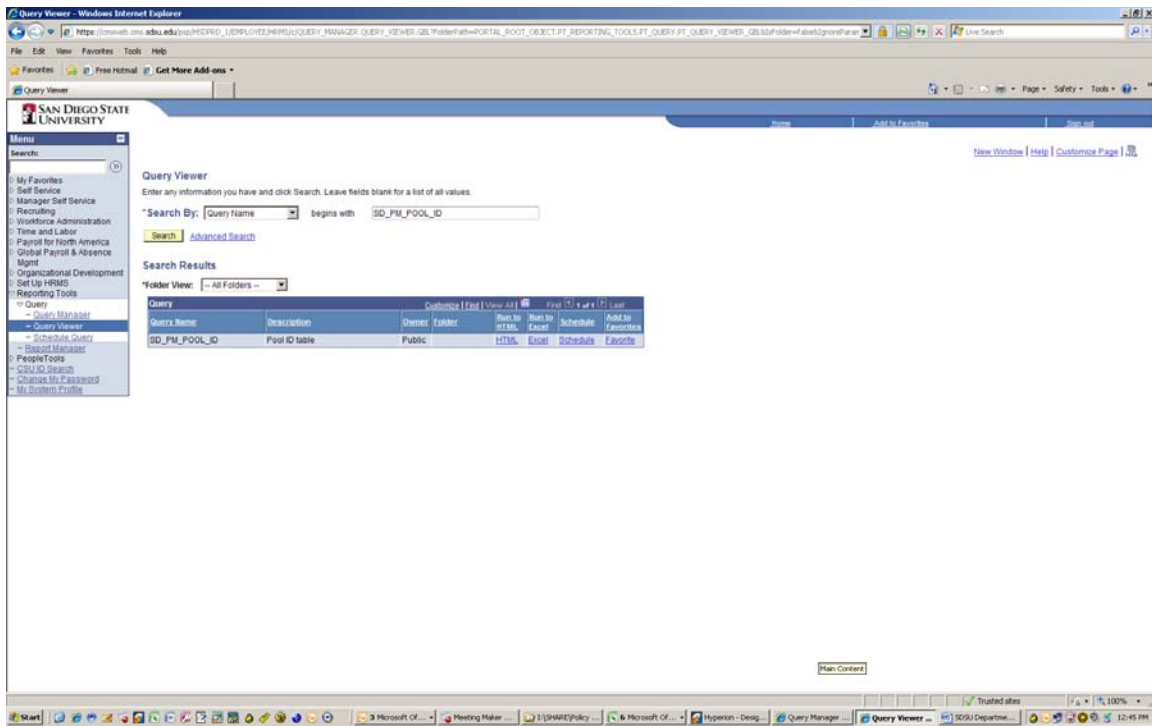
Instructions to Run Query:

Log on to PeopleSoft HCM and navigate as follows:

Main Menu > Reporting Tools > Query > Query Viewer

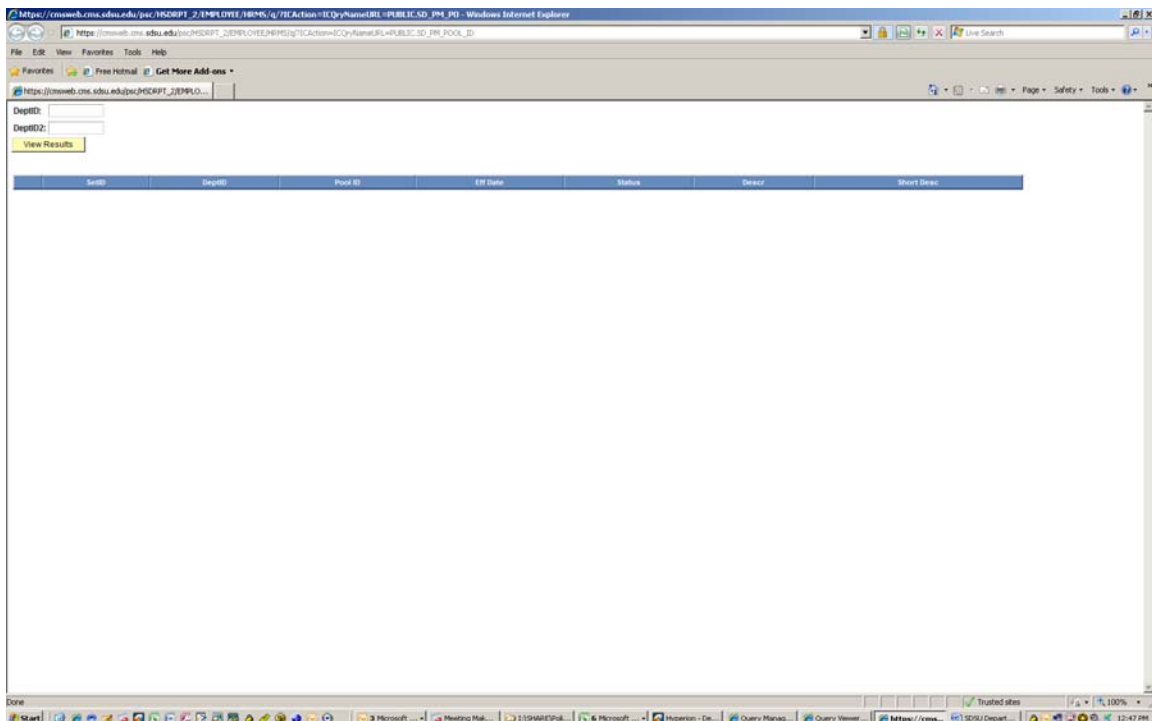


Select Search By: **QUERY NAME** begins with **SD_PM_POOL_ID** and then hit **ENTER** or click **SEARCH**.

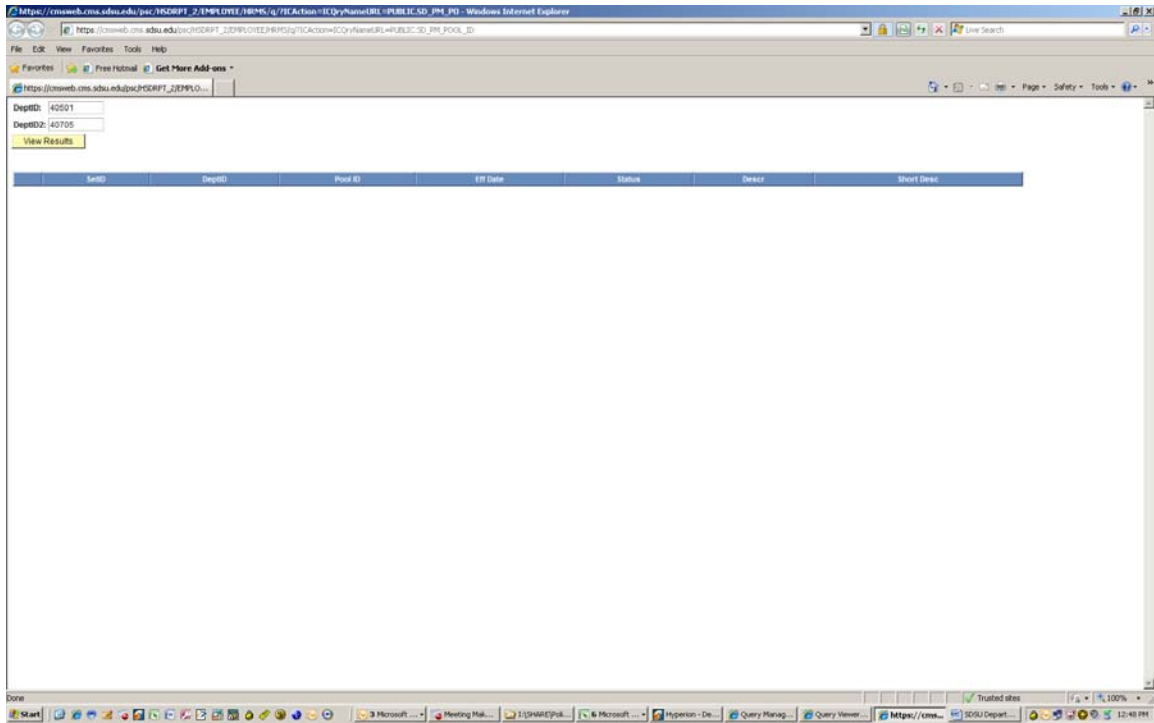


The search results will appear. On the right hand side of the results, you will have the option to either select the hyperlink to (Option 1) **RUN TO HTML** or to (Option 2) **RUN TO EXCEL**. If you choose RUN TO HTML, the results of your query will be shown on the screen and then you will have the option to export to an Excel Spreadsheet or as a CVS Text File. If you choose RUN TO EXCEL, the results of your query will be opened directly in an Excel spreadsheet.

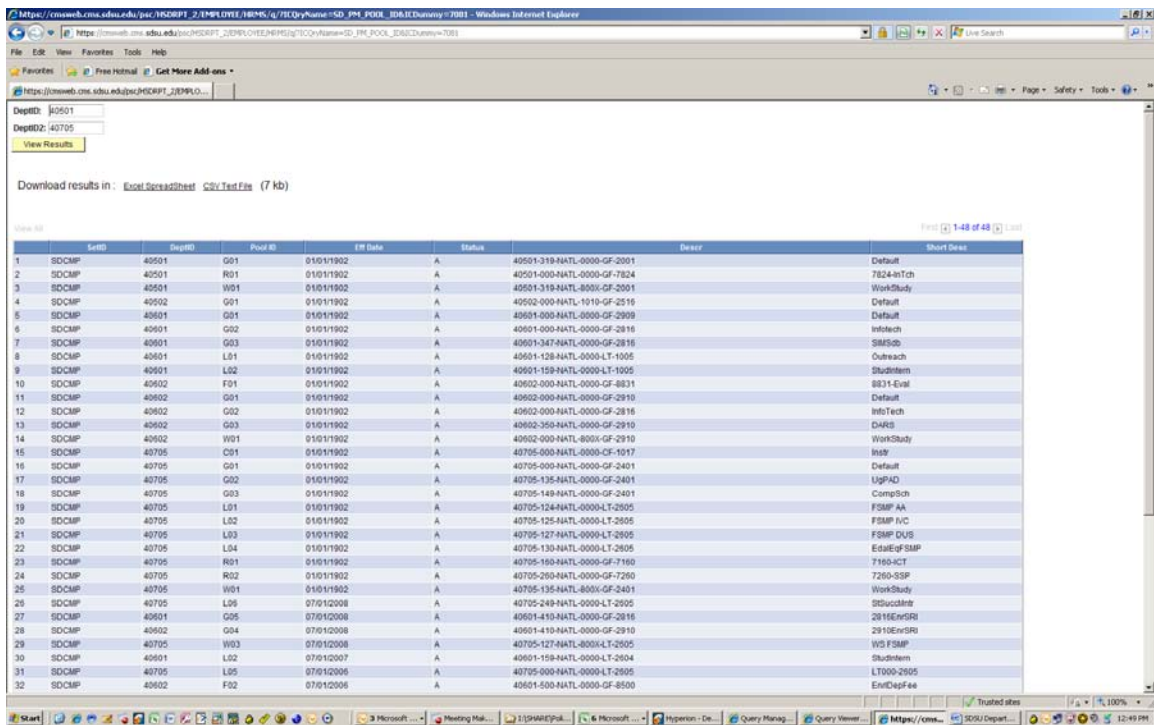
Option 1: Select the hyperlink **RUN TO HTML**:



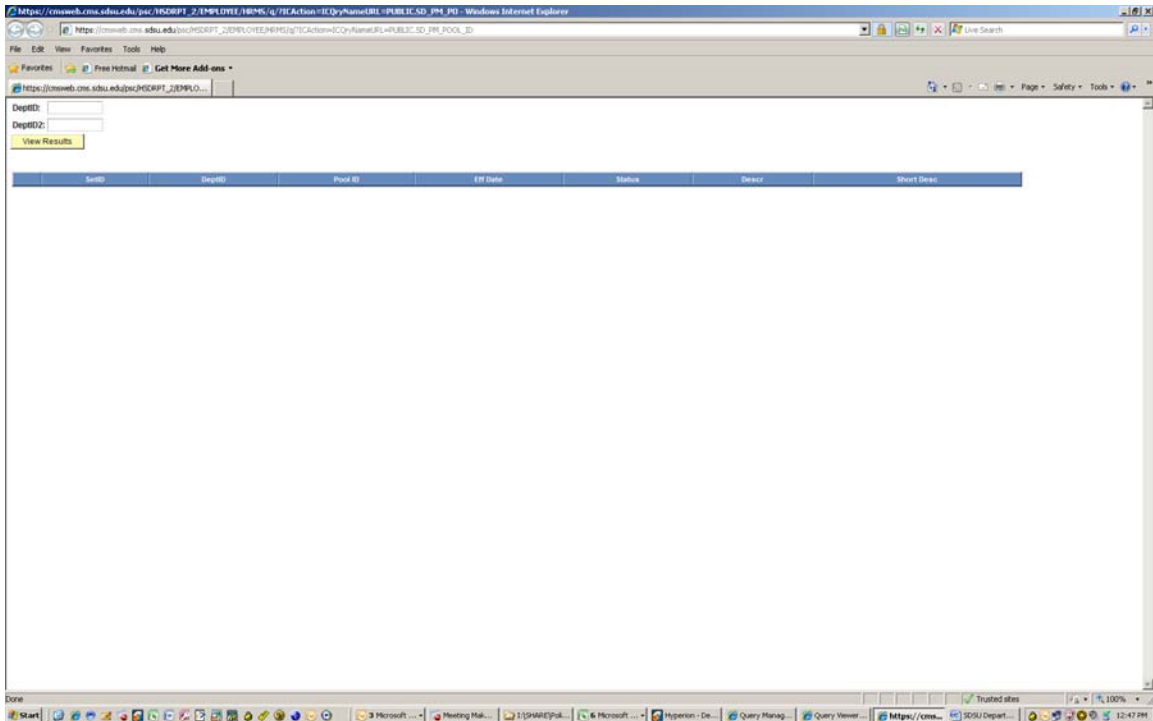
You will then need to select the range for the Department IDs you want to be included in your results. If you have only one Department ID, then you will populate both fields with the same Department ID number. Type in your **Department IDs** and select **VIEW RESULTS**.



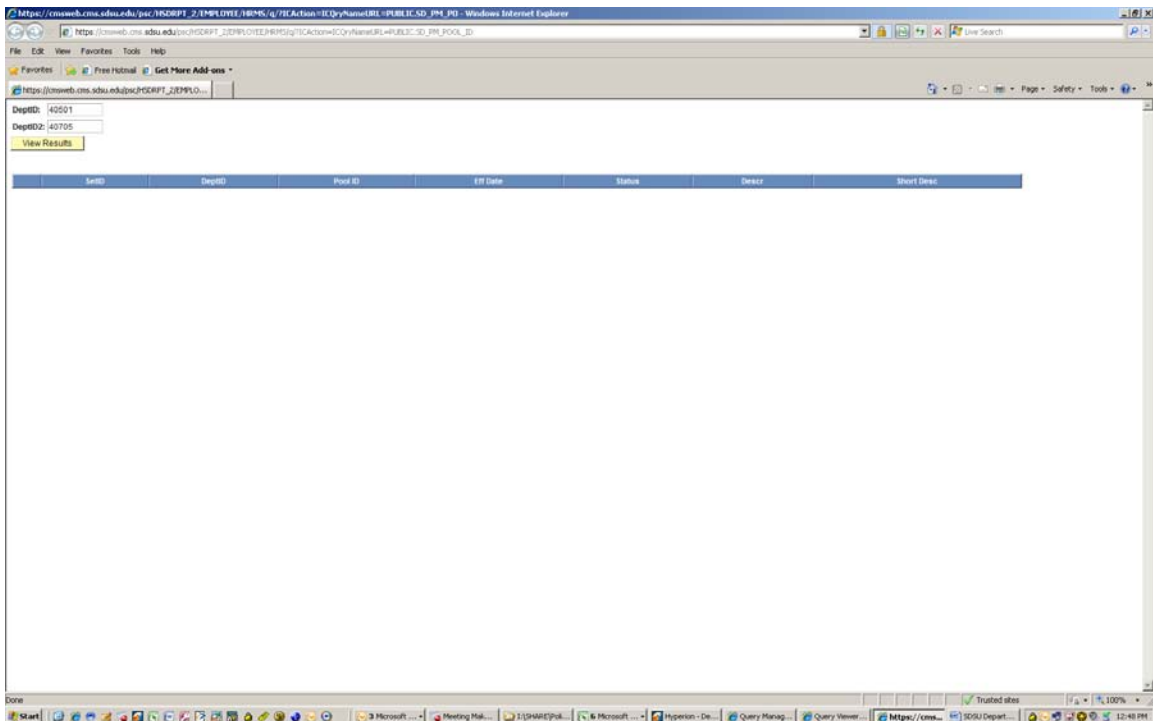
The results of your query will appear on the screen. You may at this point choose to download your results as either an Excel Spreadsheet or a CSV Text file.



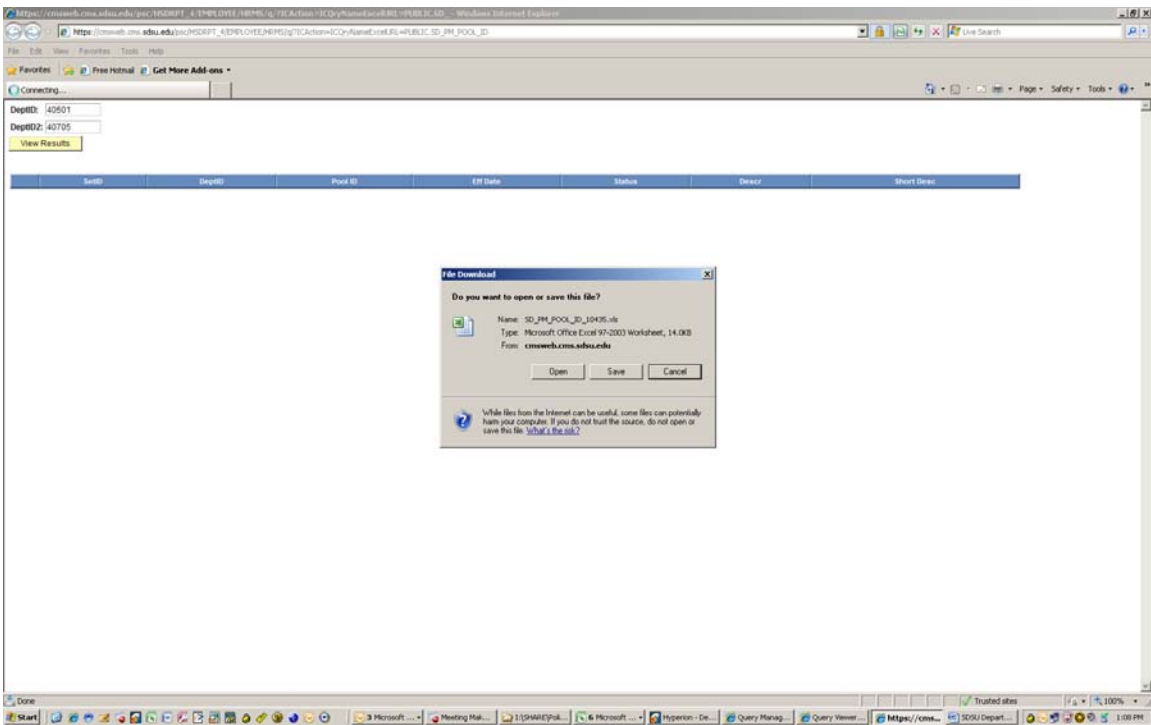
Option 2: Select the hyperlink **RUN TO EXCEL:**



You will then need to select the range for the Department IDs you want to be included in your results. If you have only one Department ID, then you will populate both fields with the same Department ID number. Type in your **Department IDs** and select **VIEW RESULTS**.



You will then be prompted to either **OPEN** or **SAVE** your output to an Excel Spreadsheet.



Select **OPEN**. Your results will appear in an Excel Spreadsheet which you can then save for future reference.

