

Step-by-Step Guide



Creating a Combo Code

Background: Beginning in FY08, combo codes for the payment of salary and wages are no longer created automatically by the system when a user does a budget transfer. Because of this, a new page has been developed in PeopleSoft to allow users to create their own combo code and receive the combo code immediately.

1.	Log in to PeopleSoft through the Financials Login (www.uvm.edu/~erp/portal).
2.	<div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid gray; padding: 5px; margin-right: 10px;"> <ul style="list-style-type: none"> ▶ My Favorites ▶ UVM Conversions ▶ UVM Interfaces ▼ UVM Modifications <ul style="list-style-type: none"> – Validate/Create Combo Code </div> <div> <p>Navigate to UVM Modifications > Validate/Create Combo Codes.</p> <p>You will see a page like the one reproduced below. Click the ADD button.</p> </div> </div>

Validate/Create Combo Code

Add a New Value

Business Unit:

Transaction Number:

Transaction Date:

3.	Type in the chartstring for which you want to create a combo code.
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Validate and Create Combo Code

Business Unit: UVM01 **Transaction Number:** CCSSKALKA20070822193241 **Date:** 08/22/2007

Budget Status: Not Chk'd **Status:** Ready

Line	*Account	Oper Unit	Department	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property
1	50200	14	54050	300	201001	311	GCA01	011554	SPNS	0000	0000	0000

4.	<p>Important Considerations:</p> <ul style="list-style-type: none"> • Since combo codes are used only for payroll-related transactions, the account must start with 5; you will get an error message if it doesn't. You do not need to create combo codes for fringe accounts (59910, 59912, 59914). • There must be an appropriate E-Level budget if the fund is an operating fund that requires one. You will get an error message if no E-Level budget exists on your chartstring for the account you selected.
5.	<p>Press Check Budget. This will ensure that a budget exists for the chartstring. You cannot create a combo code until a budget exists for the chartstring.</p> <p>When you press Check Budget, you will be brought to the following page:</p>

Commitment Control

Commitment Control Details

Source Transaction Type: Generic Transactions
 Budget Checking Header Status: Not Budget Checked
 Commitment Control Amount Type: Actuals and Recognized

Override Transaction i

Budget Check

[Go to Transaction Exceptions](#) [Go To Activity Log](#)

OK Cancel Refresh

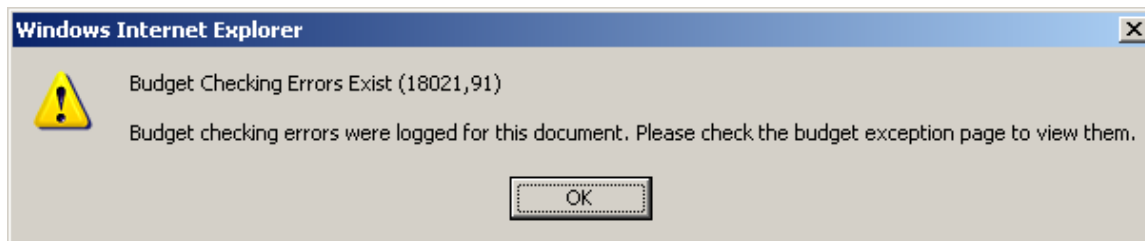
6.	Click on the Budget Check button. The budget checking process will run.
7.	When the process is done running, the area shaded green in the graphic above will either indicate that the budget check returned a valid status, or that there was an error . (If you get a warning , that is okay—treat it as a valid status.)
8.	If the status is valid, click the OK button to return to the original page. Then press the Create Combo Code button. It will process for a bit and then the combo code will appear. If one already exists, it will tell you the existing combo code.

Message that appears for a new combo code . . . or if the combo code already exists:

Status: New ComboCode Created
000101728

Status: Valid Existing ComboCode
000101728

9.	<p>If there is a budget checking error, then you cannot create the combo code. This could be for one of several reasons:</p> <ul style="list-style-type: none"> • No budget is set up for the chartstring. • The chartstring is for a grant on which spending is controlled, and you are over budget. • The chartstring is for a grant and the current date is outside of the date range specified for the grant. • The chartstring is closed.
10.	<p>If there is a budget checking error, you will get the error message reproduced below. Press OK.</p>



11.	You will then receive the following message:
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Budget Checking has logged 'Error' Exceptions. Do you want to Transfer to the Exceptions? (18021,1091)

Selecting "Yes" will transfer you to the Transaction Exception Panel for this document while refreshing and minimizing the calling panel.

Selecting "No" will refresh the panel.

You can transfer later by using the "Go to Transaction Exception Header" Push Button on this secondary panel.



12.	Click on No . You will return to the page reproduced below:
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Commitment Control

Commitment Control Details

Source Transaction Type: Generic Transactions
Budget Checking Header Status: Error in Budget Check
Commitment Control Amount Type: Actuals and Recognized
Commitment Control Tran ID: 0000570666
Commitment Control Tran Date: 09/12/2007

Override Transaction 

Budget Check

[Go to Transaction Exceptions](#) [Go To Activity Log](#)

OK

Cancel

Refresh

13.

If you'd like, you can click on the "Go to Transaction Exceptions" link to view an explanation of the error. In so doing, you will leave the combo code create page. To go back to the combo code create page after following the transaction exceptions link, you can press the back button in your browser—which is not typically a good idea, but your best option here. (If pressing the back button brings you to a page that says "page has expired," simply click the back button a second time.)

When you return to the page pictured above, click on **OK** or **Cancel** to return to the combo code set-up page. You can then change the chartstring if it needs to be adjusted, or you can leave this page and start over later, after the budget issue is resolved.

Appendix for Sponsored Projects

In the past, for Sponsored Projects, the interface automatically created a combo code for every salary and wage account. Now it will only create combo codes for the most frequently used accounts in order to reduce the number of combo codes created. The list below shows the accounts that will have combo codes automatically created when sponsored project budgets for F5000, F5510, or F5511 are created.

F5000 – Personnel Salary

50710 Other Academic Admin Work

50400 Extension Faculty

50200 Non-Tenure-Track

55210 Student Wages

50210 Clinical NT Track COM Faculty

53900 Postdoctoral Associates

55020 Graduate Research Assistants

55010 Graduate Teaching Assistants

56100 Temporary Wages

50300 Research Faculty

50100 Tenure-Track Tenured

52000 Staff Salary

F5510 – Stipends – Post Doctoral

53950 Postdoctoral Fellows

F5511 - Stipends - Pre Doctoral

55100 Fellow/Trainee