

COMBO CODES USER GUIDE

TABLE OF CONTENTS

Overview	2
Creating a Combo Code.....	2
Budget Checking Errors when Creating Combo Codes	5
Frequently Asked Questions.....	6
What are combo codes?	6
Why do I need to create a combo code?.....	6
Do I need a combo code for the benefit expense accounts?	6
How can I look up a combo code?.....	6
How can I inactivate a combo code?.....	6
Resources/Help.....	7
Help/Footprints	7
Resources.....	7
Training	7
Relevant UVM Departments.....	7
Suggestions? Updates?.....	7

Overview

The PeopleSoft Human Resources system (HCM) uses combo codes to represent the chartstring, rather than typing out each individual chartfield value. Each combo code is associated with a distinct chartstring. Combo codes are used only for payroll-related transactions.

Once a combo code has been created, the chartstring can no longer be modified. This is to preserve the data and maintain consistent reporting.

Creating a Combo Code


Combo codes are automatically created for 15 specific accounts when a F5000 budget for sponsored projects is set up. This is done with a system interface that runs twice daily. If combo codes for sponsored projects are needed for accounts other than the 15 created automatically, they can be created as outlined below.

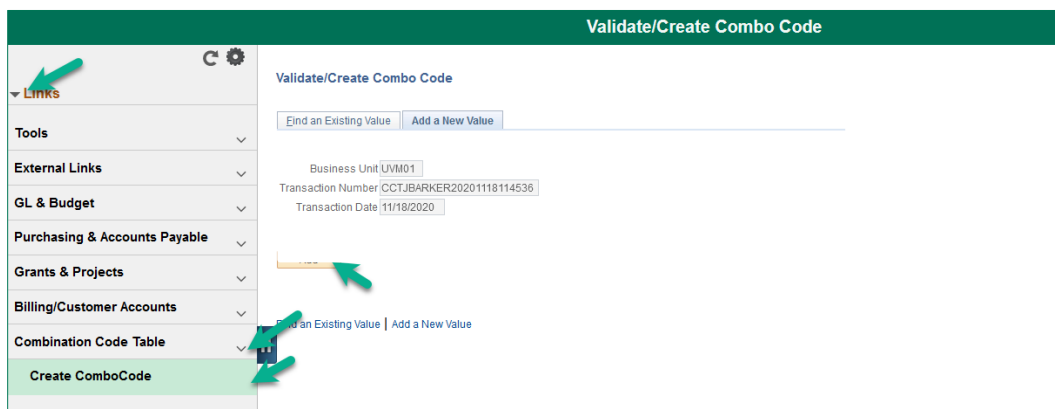
Combo codes for the payment of salary and wages using chartstrings other than sponsored projects are not created automatically when a user does a budget transfer.

There is no ability to edit an existing combo code. A new combo code needs to be created any time salary or wages are set up using a new chartstring.

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.

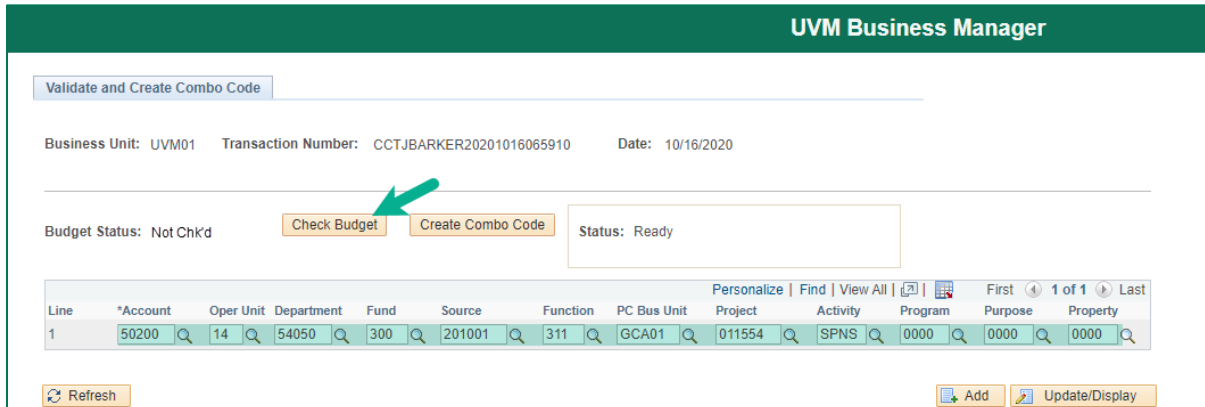


3. Click the **Arrow**  icon to expand the **Links** and **Combination Code Table** to expand the menu, and then select **Create Combo Code**.
4. Click **Add**.



5. Type in the chartstring for which to create a combo code.

NOTE: 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. A combo code is not needed for fringe/benefits accounts (59910, 59912, 59914, 59915, 59916, 59918). There must be a corresponding 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 the chartstring for the account selected.



UVM Business Manager

Validate and Create Combo Code

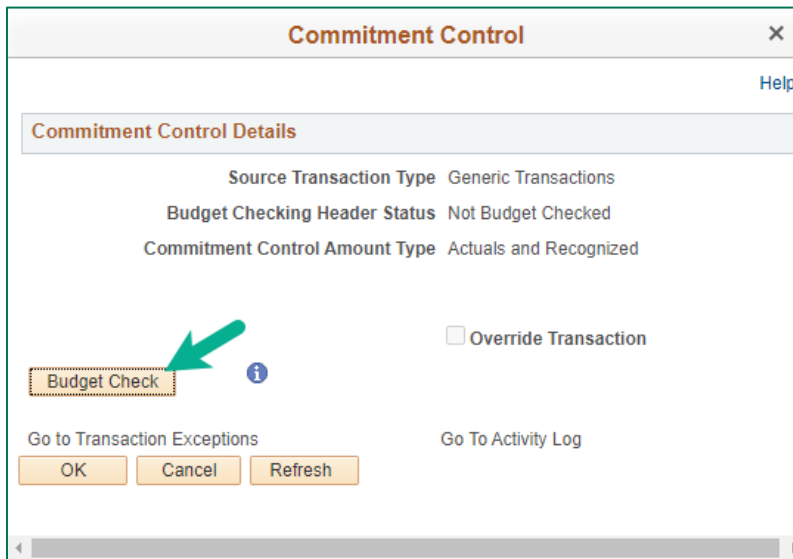
Business Unit: UVM01 Transaction Number: CCTJBARKER20201016065910 Date: 10/16/2020

Budget Status: Not Chk'd **Check Budget** **Create Combo Code** 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

Refresh **Add** **Update/Display**

6. Click **Check Budget**. This will ensure that a budget exists for the chartstring. Users cannot create a combo code until a budget exists for the chartstring.
7. Upon clicking **Check Budget**, the following page will appear.



Commitment Control × [Help](#)

Commitment Control Details

Source Transaction Type Generic Transactions

Budget Checking Header Status Not Budget Checked

Commitment Control Amount Type Actuals and Recognized

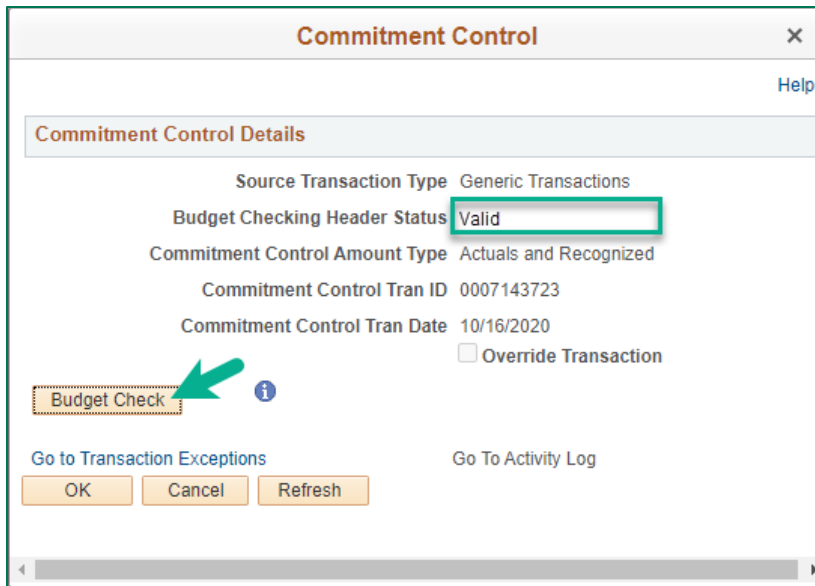
☐ Override Transaction

Budget Check ⓘ

Go to Transaction Exceptions **OK** **Cancel** **Refresh**

Go To Activity Log

8. Click the **Budget Check** button. The budget checking process will run. When the process is done running, the following screen will either indicate that the budget check returned a **Valid** status, or that there was an **Error**. **NOTE:** If a **Budget Warning** message appears, that is okay - treat it as a "valid" status.



Commitment Control [X]

[Help](#)

Commitment Control Details

Source Transaction Type: Generic Transactions

Budget Checking Header Status: **Valid**

Commitment Control Amount Type: Actuals and Recognized

Commitment Control Tran ID: 0007143723

Commitment Control Tran Date: 10/16/2020

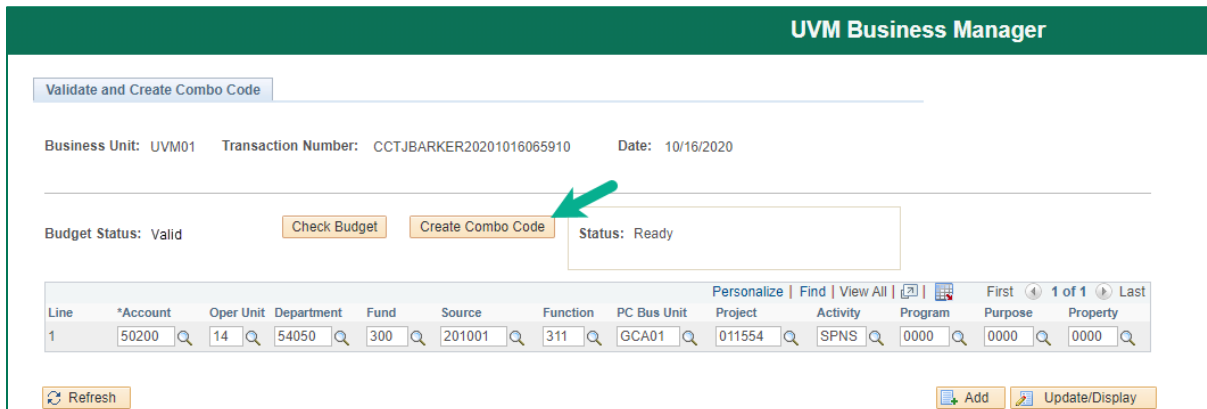
☐ Override Transaction

Budget Check ⓘ

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

OK Cancel Refresh

9. If the status is valid, click **OK** to return to the original page. If the status is error, see the **“Budget Checking Errors when Creating Combo Codes”** section below.
10. Click the **Create Combo Code** button. It will process for a bit and then the combo code will appear. If one already exists, it will return the existing combo code.



UVM Business Manager

Validate and Create Combo Code

Business Unit: UVM01 Transaction Number: CCTJBARKER20201016065910 Date: 10/16/2020

Budget Status: Valid **Check Budget** **Create Combo Code** 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

Refresh Add Update/Display

11. This is the message that appears for a new combo code, or if the combo code already exists:



Status: New ComboCode Created
000000333

Status: Valid Existing ComboCode
000000333

Budget Checking Errors when Creating Combo Codes

If there is a budget checking error, the combo code cannot be created. This could be for one of several reasons:

- No budget is set up for the chartstring.
- The chartstring is for a grant on which spending is controlled, and it is 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.

1. If there is a budget checking error, the error message below will appear. Click **OK**.

Budget Checking Errors Exist (18021,91)

Budget checking errors were logged for this document. Please check the budget exception page to view them.

OK

2. The following message will be returned:

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.

Yes **No**

3. Click **No**. The Commitment Control Details for the combo code will appear again.

Commitment Control
×

[Help](#)

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 0007143723

Commitment Control Tran Date 10/16/2020

☐ Override Transaction

Budget Check i

[Go to Transaction Exceptions](#)

OK **Cancel** **Refresh**

[Go To Activity Log](#)

4. Click the **Go to Transaction Exceptions** link to view an explanation of the error. In so doing, users will leave the combo code create page. To go back to the combo code create page after following the transaction exceptions link, click the back button in the browser - which is not typically a good idea- but it is the best option for this situation.

NOTE: If clicking the back button generates a page that says “page has expired,” click the back button a second time.

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

Frequently Asked Questions

What are combo codes?

Combo codes are used in the PeopleSoft Human Resources module (HCM) as shortcuts to chartstrings. Each chartstring is associated with a unique combo code that is created by the system.

Why do I need to create a combo code?

The HR system uses combo codes to represent the chartstring, rather than typing out all of the individual chartfield values. Combo codes are only used in the HR system.

Do I need a combo code for the benefit expense accounts?

No, users do not need combo codes for the benefit expense accounts (59910, 59912, 59914, 59915, 59916, 59918). The benefit expenses are calculated based on the account used for the payroll expense. For example, if the expenses are for staff payroll, account 52000 is associated with account 59910, which is for the full benefit rate.

How can I look up a combo code?

In the PeopleSoft HR, navigate to: **Set Up HRMS > Common Definitions > ChartField Configuration > Combination Code Table**. Search by various parts of the chartstring or by the combo code number.

How can I inactivate a combo code?

[Submit a footprint](#) with the **Functional Area: HR Commitment Accounting** and **Topic: Data Request** with the combo code information. If the combo code is on a sponsored project (GCA01), send the request directly to Sponsored Project Administration.

Resources/Help

Help/Footprints

If you have questions about information in this document, or, if after reading it, you cannot find the information you need, please submit a PeopleSoft help desk ticket in [Footprints](#).

Resources

- [Chart of Account Spreadsheets](#)
- [University Policies and Operating Procedures](#)

Training

- [UFS Roadshow Topics \(PDF\)](#)
- [Professional Development & Training Classes](#)

Relevant UVM Departments

- [Financial Accounting and Reporting Services](#)

Suggestions? Updates?

Send an email to PS9-1Updates@uvm.edu.