

9.2 Creating a New Combo Code

Purpose: Use this document to create a new combo code in ctcLink.

Audience: Finance.

 You must have at least one of these local college managed security roles:

- ZC HR Combo Code
- ZD HR Central Config VW
- ZZ Payroll Local Config
- ZZ HR Combo Code

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Creating a New Combo Code

Combination Code Table

Navigation: NavBar > Navigator > Set Up HCM > Common Definitions > Chartfield Configuration > Combination Code Table

1. The Combination Code Table search page displays.
2. Select the **Add a New Value** tab.
3. Enter the **Set ID** (Leave the GL Combination Code field at default-make no entries).
4. Select the **Add** button.

Combination Code Table

Find an Existing Value **Add a New Value**

Set ID WA140 🔍

Process Group PAYROLL

GL Combination Code NEW

Add

5. The Combination Code Table displays.
6. In the Combination Code Detail section, complete the following fields:
 - **Effective Date** (starting at 01/01/1901)
 - **Status** (active)
 - **Description** (according to your business decisions)
 - **Short Desc** (according to your business decisions)
7. In the **ChartField Detail** section, complete (at a minimum) the following fields:
 - **Operating Unit**
 - **Account**
 - **Fund Code**
 - **Appropriation Index** (optional)
 - **Department**
 - **Class Field**
 - **Department**
 - **PC Business Unit**
 - **Project**
 - **Activity**
 - **State Purpose**

! NOTE: If this is a project Combo Code, the **Business Unit PC, Project/Grant** and **Activity ID** must be entered.

8. Select the **Save** button.

Combination Code Table

Set ID: WA140
 Process Group: PAYROLL
 GL Combination Code: NEW

Combination Code Detail

*Effective Date: 01/02/2020 *Status: Active

*Description:
 Short Desc: Valid Value

ChartField Detail

Operating Unit :	<input type="text"/>
Account :	<input type="text"/>
Fund Code :	<input type="text"/>
Appropriation Index :	<input type="text"/>
Class Field :	<input type="text"/>
Department :	<input type="text"/>
Program Code :	<input type="text"/>
PC Business Unit :	<input type="text"/>
Project :	<input type="text"/>
Activity :	<input type="text"/>
Source Type :	<input type="text"/>
Category :	<input type="text"/>
Subcategory :	<input type="text"/>
Sub Account :	<input type="text"/>
State Purpose :	<input type="text"/>
Affiliate :	<input type="text"/>

 The Load Combination Code is a scheduled process that runs daily and is part of the procedure to create a new combo code.

If a college needs the process to be run right away, a Service Desk Ticket would need to be submitted by the college to HCM Support.

Instructions for Running a PAY760 Report

 There are two ways to find the new Combo Code assigned to this Chartfield string, either a query or the HCM PAY760 report (see below).

 You must have at least one of these local college managed security roles:

- ZD HR Central Config VW
- ZZ Payroll Local Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Set Up HCM > Common Definition > Chartfield Configuration > Combination Code Report

1. The Combination Code Report search page displays.
2. Select the **Find an Existing Value** tab OR **Add a New Value** tab.
3. Enter search criteria.
4. Select the **Search** button.

Combination Code Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Run Control ID begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

5. The Combination Code Report page displays.
6. Select **Run**.

Combination Code Report

Run Control ID combo_code_validation | Report Manager | Process Monitor | **Run**

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display

7. The Process Scheduler Request page displays.
8. The **Combination Code Report** box should be check marked.
9. Select the **OK** button.

Process Scheduler Request

User ID 201253052 Run Control ID combo_code_validation

Server Name Run Date 11/18/2018

Recurrence Run Time 10:55:47AM

Time Zone

Process List

Select	Description	Process Name	Process Type	-Type	-Format	Distribution
<input checked="" type="checkbox"/>	Combination Code Report	PAY760	SQR Report	Web	PDF	Distribution

10. The Combination Code Report page displays.
11. Make note of the **Process Instance** number.
12. Select the **Process Monitor** link to review the progress of the **Run Control**.

Combination Code Report

Run Control ID combo_code_validation Report Manager **Process Monitor**

Process Instance: 135842

13. The Process Monitor page displays.
14. On the Process List page, select **Refresh** until the **Run Status** equals "Posted" and the **Distribution Status** equals "Posted".
15. The PAY760 report can be reviewed.
16. Select the the "**Go back to Combination Code Report**" link located at the bottom of the page.

Process List | [Server List](#)

View Process Request For

User ID: Type: Last 1 Days

Server: Name: Instance From: Instance To:

Run Status: Distribution Status: Save On Refresh

Process List

| 1-2 of 2 | [View All](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	135842		SQR Report	PAY760	201253052	11/18/2018 10:55:47AM PST	Success	Posted	Details
<input type="checkbox"/>	135841		SQR Report	PAY760	201253052	11/18/2018 9:42:36AM PST	Success	Posted	Details

[Go back to Combination Code Report](#)

[Process List](#) | [Server List](#)

17. The Combination Code Report page displays.
18. Select the **Report Manager** Link.

Combination Code Report

Run Control ID: combo_code_validation [Report Manager](#) Process Monitor

19. The Report Manager page displays.
20. Select the **Administration** tab.
21. The Administration page displays.
22. Select the link **Report Description**.

List | Explorer | **Administration** | Archives

View Reports For

User ID: 201253052 Type: [] Last: [] 1 Days: [] Refresh

Status: [] Folder: [] Instance: [] to: []

Report List

1-2 of 2 | View All

Select	Report ID	Prco Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	121052	135842	Combination Code Report	11/18/2018 10:58:38AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	121051	135841	Combination Code Report	11/18/2018 9:45:56AM	Acrobat (*.pdf)	Posted	Details

Select All Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to Combination Code Report](#)

Save

List | Explorer | Administration | Archives

i The report that is accessed as a PDF file which can be searched for the new input Chartfield string. By searching this report you can find the new Combo Code given to this Chartfield string.

23. The report displays.
24. Press **Ctrl+F** to find the new ChartField string. The Combo Code is the third field on the first line of an entry.

Report ID: PAY760

PeopleSoft
Valid Combination Code Table

Page No. 1
Run Date 02/17/2017
Run Time 08:13:12

SetID	Process Group	Effective Date	Status	Combination Code	Description	Short Description	Valid Combination								
WA170		01/01/1901	A	000197563	test	test									
	Operating Unit	Acct	Alt Account	Fund	Dept ID	Class	Program	Budget Ref	PC Bus Unit	Project	Activity	RarcType	Category	RarcSubCat	Sub Account
	7172	601050	148	58652	042										
	State Purposes	Affl	Fund Affil	Oper Unit	Affil										
	N														
WA170	BENFIT170	01/01/1901	I	000114695	Health Life and Disability Ins	HealthLife	Y								
	Operating Unit	Acct	Alt Account	Fund	Dept ID	Class	Program	Budget Ref	PC Bus Unit	Project	Activity	RarcType	Category	RarcSubCat	Sub Account
	7172	602040	101	58408	011										
	State Purposes	Affl	Fund Affil	Oper Unit	Affil										
	N														
WA170	BENFIT170	01/01/1901	A	000114696	Medical Aid	MedicalAid	Y								
	Operating Unit	Acct	Alt Account	Fund	Dept ID	Class	Program	Budget Ref	PC Bus Unit	Project	Activity	RarcType	Category	RarcSubCat	Sub Account
	7172	602030	149	58399	011										
	State Purposes	Affl	Fund Affil	Oper Unit	Affil										
	Y														

25. When pressing **Ctrl+F**, enter the ChartField in this order with a space between each:

- a. **ChartField**
- b. **Business Unit,**
- c. **Account,**
- d. **Fund,**
- e. **Department,**
- f. and **Class.**



! A common error with creating combo codes is the Department date not being 01/01/1901. Any new Department must have this date or this process will not "read" it.

For any old department in which there is a change, such as manager, a person can effective date it to the appropriate date as long as the original entry is 01/01/1901 it will process fine.

The process for creating a new combo code is now complete.

End of procedure.