Creating a New Combo Code Using eForms

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Creating a New Combo Code

When you receive a Speed Code from Financial Services and have access to Add or Update an eForm, you have the ability to create the corresponding new Combo Code on your own.

In this topic, you will learn how to create a new Combo Code using the eForm application.

Procedure

Navigation Path: Main Menu > UofA eForms WorkCenter > Add an eForm

Important!
Before you can create a new combo code, you MUST have the Speed Code from Financial Services.

1. Creating a new combo code is done within the Compensation Information page and is part of another action, such as Hiring Staff, Taking Other Job Action, or Updating an eForm. You cannot create a new combo code as a separate action of its own.

Therefore, this tutorial will not include details on the action used to reach the Compensation Information page. Refer to the appropriate action topic for these details.

2. To demonstrate how to create a new combo code, the Hiring a Support Staff action is used.
3. Once you have opened the eForms WorkCenter menu, Click the Add an eForm link.

4. All actions within eForms starts with conducting a search for the Person.

   In this example, the search fields have been entered for you.

   Click the Search button.

5. The following pages have been completed for you and are shown for demonstration purposes only.

   Click the Add Person for Hire button.
6. All required fields have been entered within the Personal Information page.

Click the Next >> button.
7. All fields within the **Basic Job Information** section have been entered.
8. All fields within the **Job Information** section have been entered. Click the **Next >>** button.

9. Within the **Compensation Information** page, continue to enter the appropriate information within the Compensation Information section.

10. The **Compensation Distribution** section is not only used to specify how the person's salary and benefits are to be distributed within finance. This is where you can create a new combo code.

11. Click the button to the right of the **Earnings Code** field.

12. A list of valid Earning Codes for that Employee Type is provided. Select the appropriate Earnings Code.

   In this example, Click the **018 - Reg** link.
13. The Earnings Code MUST be entered before selecting the Combo Code.

   Click the **Select Combo Code** button.

![Select Combo Code Button](image)

14. Click the **Speed Types** option.

![Speed Types Option](image)

15. Click the **Search** button.
16. Enter the Speed Code into the **SpeedType Key** field.

   In this example, enter "**ZH790**".

17. Press **[Tab]**.

18. The fields within the Chartfield section will automatically populate with the corresponding information from the speed code entered.

**Note:** The Account field will be blank. DO NOT enter an account number. Leave it blank.
19. In the Chartfield Detail area, notice that the Account field is automatically populated with the default account 500001.

Click the Select button.

![Chartfield Detail](image)

20. Again, the system will automatically populate the chartfield detail information. DO NOT over write any of these fields.

If the information is incorrect, contact Financial Services for a new Speed Code with the correct information.

If everything is correct, Click the Ok button.

![Ok Button](image)

21. You are returned to the Compensation Distribution section and the new Combo Code has been created and appears within the detail grid as shown.
22. Continue with the remaining steps related to the action you are using to create the new combo code.

Click the Next >> button.
23. In this example, the bank information fields are left blank. However, if you have the information, enter it.

Click the Next >> button.
24. The required fields within the **UA Specific Information** page have been entered. 

Click the **Next >>** button.
25. The required fields within the **Submit** page have been entered.

Click the **Submit** button.
26. Click the **OK** button.

![OK button image]

**Note:** You must complete the action used to create the new combo code for the system to save the information.

27. When you are done, Click the **Close** button.

![Close button image]

28. Congratulations! You have completed the training on Creating a New Combo Code using eForms.

**End of Procedure.**