
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Cross-referencing Speed Type to Combo Code



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Training Guide

Cross-referencing Speed Type to Combo Code



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Cross-referencing Speed Type to Combination Code

There are two coding methods used within the three different applications of PeopleSoft to identify an entire chartfield string.

Speed Code (aka Speed Type) is the U of A customized code used within the Financial Services (FS) & Campus Solutions (CS) PeopleSoft application.

Combo Code is the system-generated code used within the PeopleSoft HCM.

Important!

Every Chartfield String has a corresponding Speed Code used in FS and CS AND a Combination Code used in HCM. Therefore, every speed code has a matching combo code.



In this topic, you will learn how to search for the combination code that matches a speed type.

This is a two-step process.

Step 1: Find the Corresponding Chartfield String of a Speed Type

Step 2: Use the Chartfield String information to find the Combination Code

Procedure

Navigation Path: [Main Menu](#) > [Set Up HCM](#) > [Common Definitions](#) > [ChartField Configuration](#) > [ChartField Speedtypes](#)

1. **Step 1:** Find the Corresponding Chartfield String of a Speed Type

Once you have navigated to the **ChartField SpeedTypes** page, enter the speed code/speed type into the **SpeedType Key** field.

In this example, enter "06912".



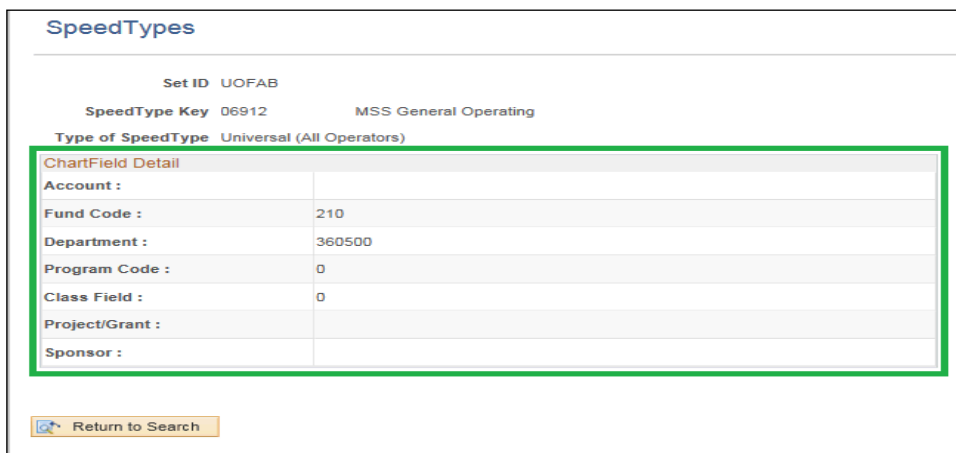
The screenshot shows the 'ChartField Speedtypes' search interface. At the top, it says 'Human Capital Management'. Below that, there's a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There's a 'Find an Existing Value' button. Under 'Search Criteria', there are four search criteria: 'Set ID:', 'SpeedType Key:', 'User ID:', and 'Primary Permission List:'. Each has a 'begins with' dropdown and a text input field. The 'SpeedType Key' field contains '06912'. There's also a 'Limit the number of results to (up to 300):' field with '300' entered. At the bottom, there are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

2. Click the **Search** button.

3. The **ChartField Detail** will be provided.

Write down the provided information including those fields with a zero-value entered.

You will need to enter this same information in the next search page.

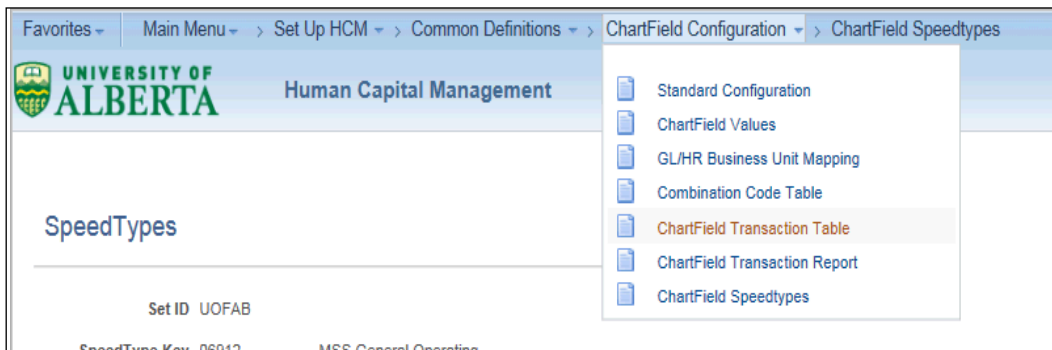


The screenshot shows the 'SpeedTypes' detail page. It displays the following information: Set ID: UOFAB, SpeedType Key: 06912, and MSS General Operating. Below that, it says 'Type of SpeedType: Universal (All Operators)'. A table titled 'ChartField Detail' is highlighted with a green border. The table has two columns: 'Field Name' and 'Value'. The rows are: Account: (blank), Fund Code: 210, Department: 360500, Program Code: 0, Class Field: 0, Project/Grant: (blank), and Sponsor: (blank). At the bottom, there is a 'Return to Search' button.

| Field Name | Value |
|-----------------|--------|
| Account : | |
| Fund Code : | 210 |
| Department : | 360500 |
| Program Code : | 0 |
| Class Field : | 0 |
| Project/Grant : | |
| Sponsor : | |

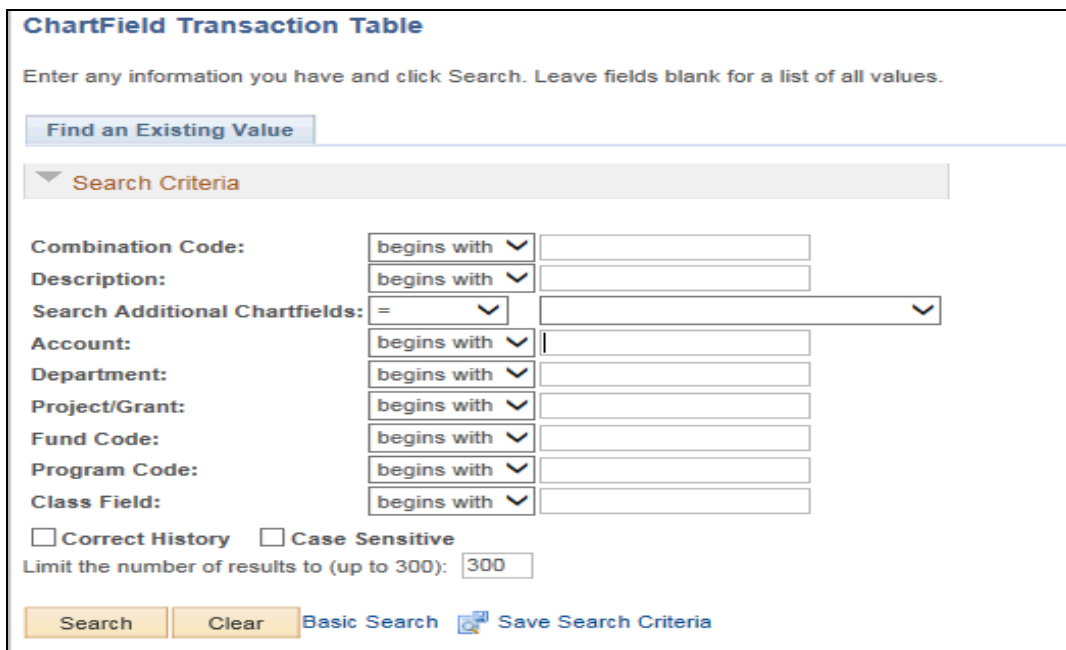
- Step 2:** Use the Chartfield String information to find the Combination Code

Within the breadcrumb on the page, click the **ChartField Configuration** link.



- Click the **ChartField Transaction Table** list item.
- Enter all information you recorded earlier into the corresponding fields.

Note: Leave fields blank to view ALL values of that field.



The screenshot shows the 'ChartField Transaction Table' search form. It includes a search criteria section with the following fields:

- Combination Code: begins with [dropdown] [text box]
- Description: begins with [dropdown] [text box]
- Search Additional Chartfields: [=] [dropdown] [text box]
- Account: begins with [dropdown] [text box]
- Department: begins with [dropdown] [text box]
- Project/Grant: begins with [dropdown] [text box]
- Fund Code: begins with [dropdown] [text box]
- Program Code: begins with [dropdown] [text box]
- Class Field: begins with [dropdown] [text box]

Additional options include: Correct History, Case Sensitive, and a limit of 300 results. Buttons for Search, Clear, Basic Search, and Save Search Criteria are at the bottom.

- In the **Account** field ALWAYS enter the default account number "**500001**".

8. PeopleSoft uses the default account number 500001 as a trigger to assign the appropriate payroll account based on the following criteria:
- Employee Type
 - Employee Class
 - Regular/Temporary
 - Pay Group
 - Salary Plan

Therefore, ALWAYS enter 500001 in the account field when using search parameters.

9. In this example, enter "360500" into the **Department** field.

10. In the **Fund Code** field, enter the Fund Code you recorded.

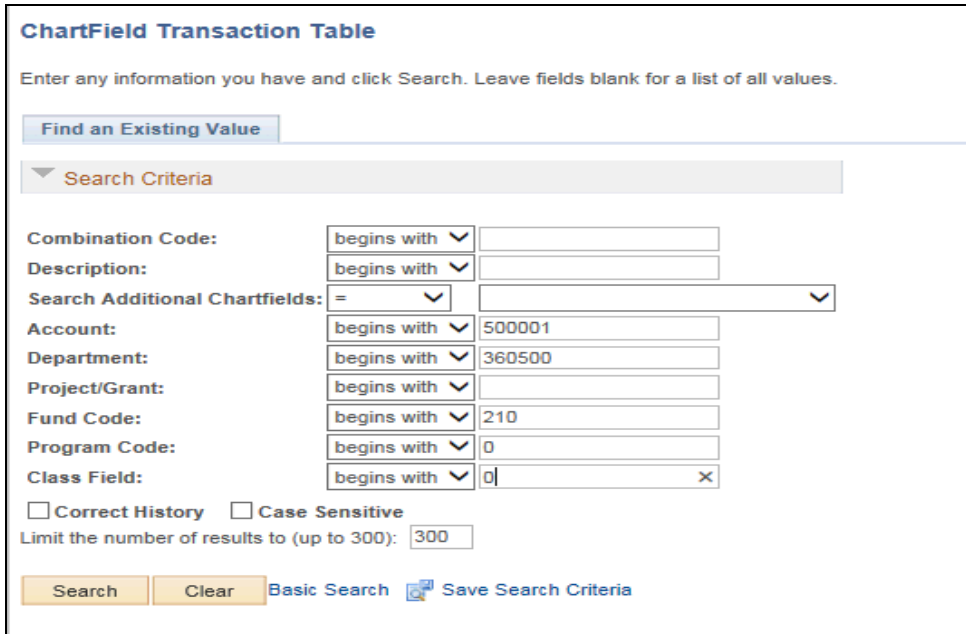
In this example, enter "210".

11. Next, enter the Program Code you recorded into the **Program Code** field

In this example, enter "0".

12. Enter the Class Field number you recorded into the **Class Field** field.

In this example, enter "0".



ChartField Transaction Table

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

[Find an Existing Value](#)

▼ Search Criteria

| | | |
|--------------------------------|---------------|------------------------|
| Combination Code: | begins with ▼ | <input type="text"/> |
| Description: | begins with ▼ | <input type="text"/> |
| Search Additional Chartfields: | = ▼ | <input type="text"/> |
| Account: | begins with ▼ | 500001 |
| Department: | begins with ▼ | 360500 |
| Project/Grant: | begins with ▼ | <input type="text"/> |
| Fund Code: | begins with ▼ | 210 |
| Program Code: | begins with ▼ | 0 |
| Class Field: | begins with ▼ | 0 <input type="text"/> |

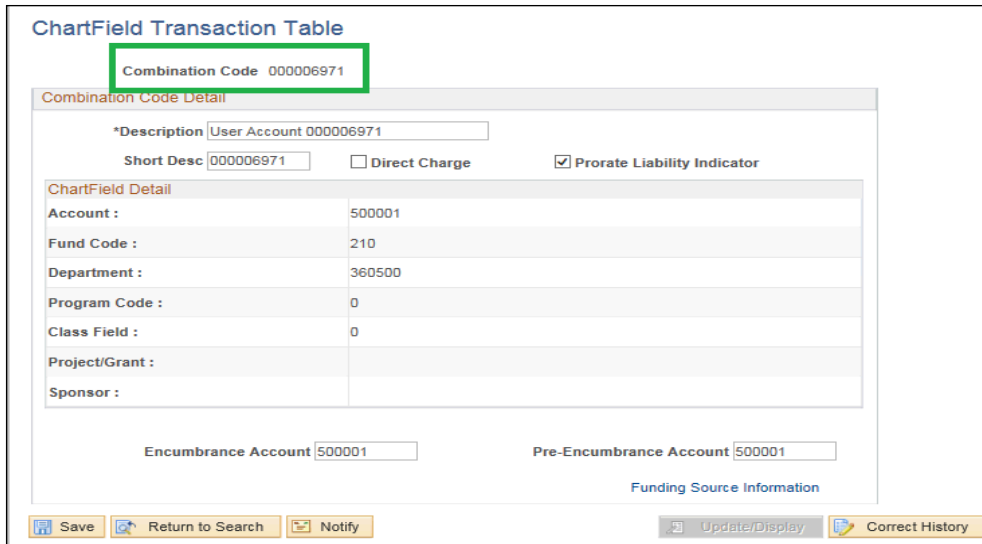
Correct History Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)

13. Click the **Search** button.

14. The Combination Code is provided at the top of the page.



15. Click the **Return to Search** button.
16. You may continue to enter other search criteria to find other combo codes as required.
17. Congratulations! You have completed the training on how to Cross-reference a Speed Type to a Combo Code.

For reference materials and more tutorials please see the links provided below.

End of Procedure.



For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (<https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service>).



For **HR Professionals**, all PeopleSoft HCM Learning Reference Materials are available within the Human Resource Services website under the PeopleSoft Training web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training>).



Refer to the Online Learning web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning>) within the Human Resource Services website for all Online Tutorials and videos.