
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Overriding ChartFields



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Created on 7/13/2018 2:59:00 PM

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Overriding Chartfields

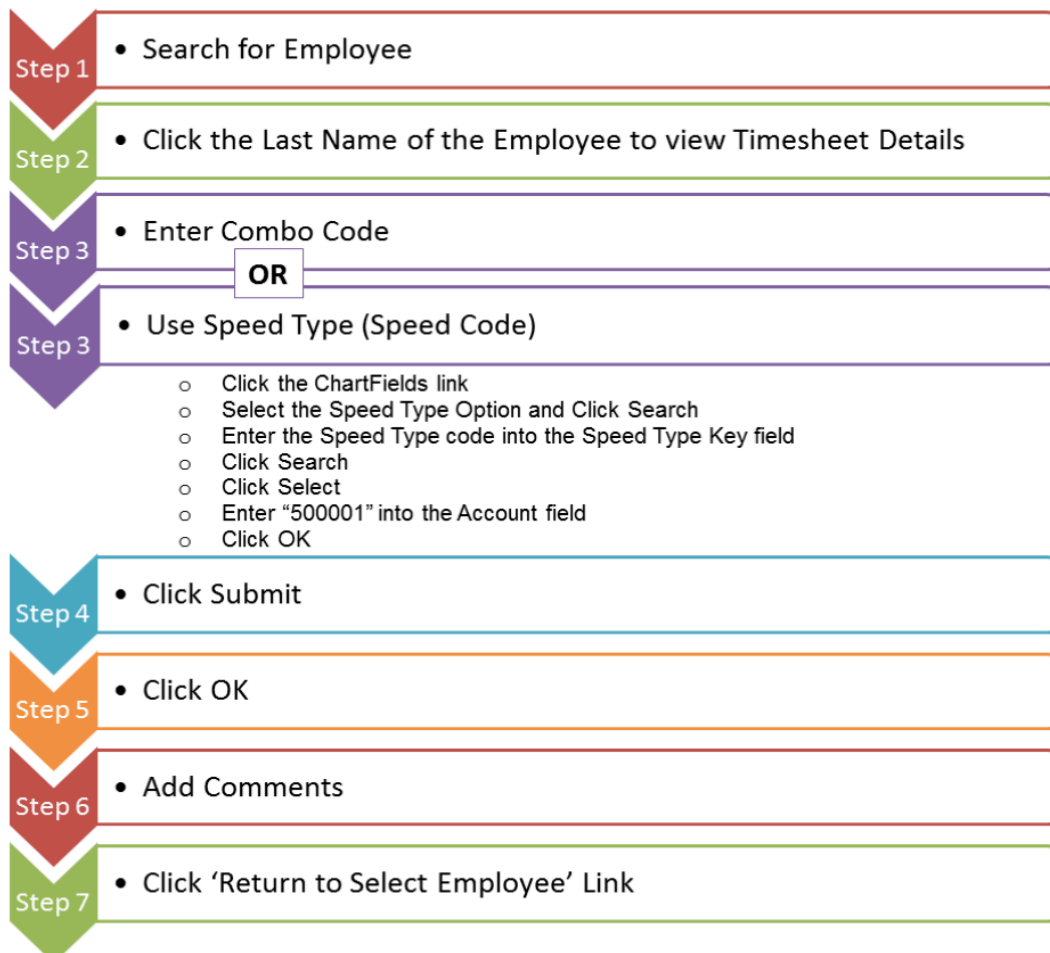
If an Employee's work is funded from a different project and not directly from their default Job record, then ChartField (Combination Code) overrides are required. The chartfield should be provided by the Employee's Supervisor/Manager.

In this topic, you will learn how to override chartfields.

Procedure

Navigation Path: [Main Menu](#) > [Self Service](#) > [Time Reporting](#) > [Report Time](#) > [Timesheet](#)

Steps to Override Chartfield



1. **Step 1: Search for Employee**

Once you have navigated to the **Timesheet Summary** page, search for the employee requiring the chartfield override.

2. Although you can use multiple search criteria, the most reliable search is done using the Employee ID.

In this example, enter "**1278998**" into the **Employee ID** field.

3. Click the **Get Employees** button.

4. **Step 2: Click the Last Name of the Employee to view the Timesheet Details**

The employee record(s) associated with the searched employee will be listed in the **Time Summary** tab.

Click the **Last Name of Employee** link.

5. **Step 3: Enter Combination Code or Use Speed Code**

The next step is dependent on whether you know the combination code or the speed type of the different job. Your supervisor should provide the coding to use.

6. **Step 3A: Enter Combination Code**

If you know the Combination Code, within the **Timesheet** page find the transaction requiring the override and go to the **Combination Code** column.

7. You can enter the combination code directly into the field.

In this example, enter "**00001724**" into the **Combination Code** field.

Note: Changing the Combination Code will only apply to the one row and not the entire timesheet.

... **Continue to Step 4.**

8. **Step 3B: Use Speed Type (Speed Code)**

If you do not know the Combination Code, you can use the Speed Type to search for the matching combination code using the Chartfields link.

Click the **Chartfield** link.

9. Within the **Chartfield Detail** page, you can search by speed type.
Click the **Speed Types** option.
10. Click the **Search** button.
11. In the **Search Speed Types** page, enter the Speed Type into the **Speed Type Key** field.
In this example, enter "**01338**".
12. Click the **Search** button.
13. Chartfield details matching the speed type are provided in the details area and can be selected to populate the chartfield 'Search' parameter.
14. Click the **Select** button.
15. In the **ChartField Detail** page, the information from the **Search Speed Type** page is automatically populated into their corresponding fields.
The default account code 500001 must ALWAYS be entered into the Account field.
Enter the default account code "**500001**" into the **Account** field.
Note: By using the **default account code 500001**, the system will automatically assign the correct account code based on the parameters setup behind the scenes.
16. Click the **Ok** button.
17. The Combination Code that matched the speed type will automatically populate into the **Combination Code** field.
18. **Step 4:** Click the **Submit** button.
This will save the changes you made.
19. **Step 5:** Click OK
The **Submit Confirmation** page will provide a message indicating the submission was successful.
Click the **OK** button.

20. **Step 6: Add Comments**

IMPORTANT!

Don't forget to add a Comment to the line that you changed the chartfield on. The comments are used for audit trail purposes and should be added whenever a change is made.

Refer to the topic "Adding Comments to Time Entered" for further details.

21. **Step 7: Click the [Return to Select Employee](#) link.**

Once you have saved and submitted the changes you can return to the Employee Search page.

22. Congratulations! You have completed the training on how to override chartfields within the Timesheet.

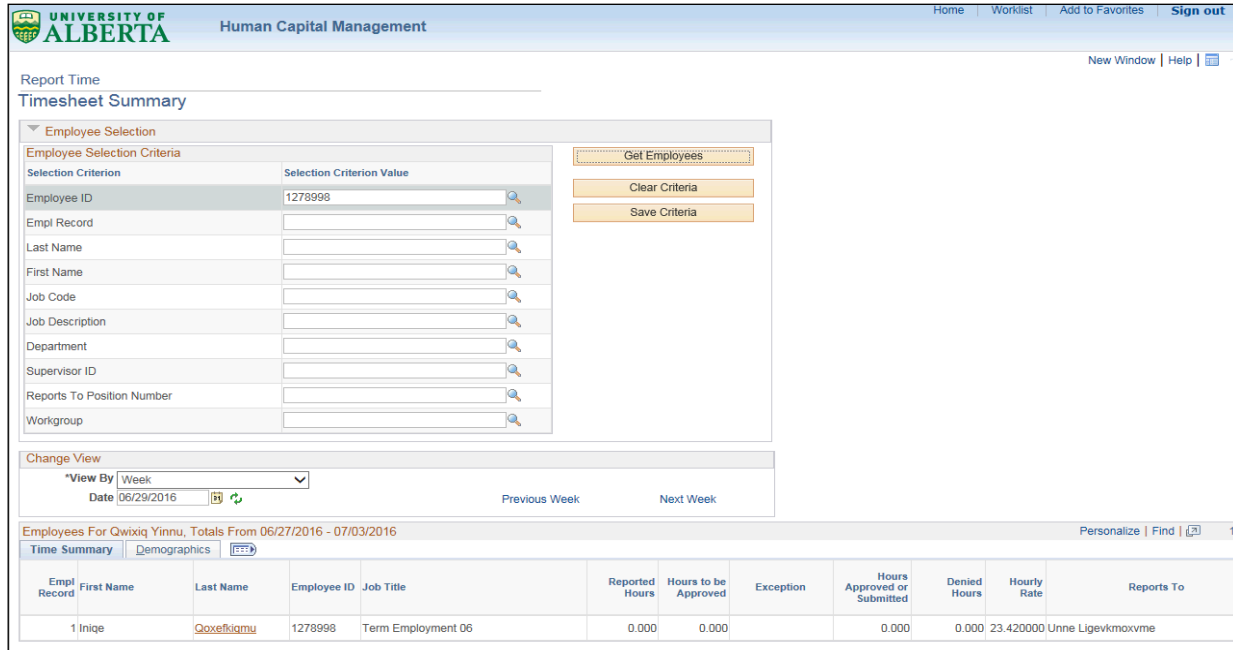
For reference materials and more tutorials please see the links provided below.

End of Procedure.

Screen Shots

The following provides the supporting screen shots for this procedure.

Step 1: Search for Employee



Report Time Timesheet Summary

Employee Selection

Employee Selection Criteria

Selection Criterion	Selection Criterion Value
Employee ID	1278998
Empl Record	
Last Name	
First Name	
Job Code	
Job Description	
Department	
Supervisor ID	
Reports To Position Number	
Workgroup	


Buttons: Get Employees, Clear Criteria, Save Criteria

Change View: *View By Week, Date 06/29/2016, Previous Week, Next Week

Employees For Qwxixq Yinnu, Totals From 06/27/2016 - 07/03/2016

Empl Record	First Name	Last Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Exception	Hours Approved or Submitted	Denied Hours	Hourly Rate	Reports To
1	Iniqe	Qoxefiqimu	1278998	Term Employment 06	0.000	0.000		0.000	0.000	23.420000	Unne Ligevkmoxvme

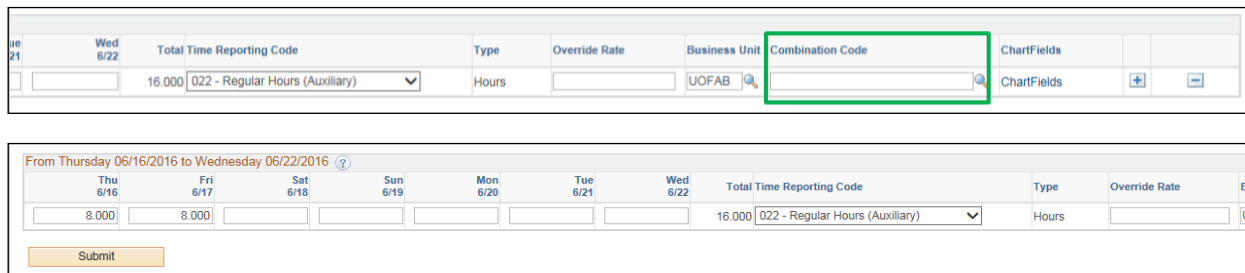
Step 2: Click the Last Name of the Employee to view the Timesheet Details



Employees For Qwxixq Yinnu, Totals From 06/27/2016 - 07/03/2016

Empl Record	First Name	Last Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Exception	Hours Approved or Submitted	Denied Hours	Hourly Rate	Reports To
1	Iniqe	Qoxefiqimu	1278998	Term Employment 06	0.000	0.000		0.000	0.000	23.420000	Unne Ligevkmoxvme

Step 3A: Enter Combination Code



Wed 6/22	Total Time Reporting Code	Type	Override Rate	Business Unit	Combination Code	ChartFields
16.000	022 - Regular Hours (Auxiliary)	Hours		UOFAB		

Thu 6/16	Fri 6/17	Sat 6/18	Sun 6/19	Mon 6/20	Tue 6/21	Wed 6/22	Total Time Reporting Code	Type	Override Rate
8.000	8.000					16.000	022 - Regular Hours (Auxiliary)	Hours	

Submit

Training Guide

Overriding ChartFields

Step 3B: Use Speed Type (Speed Code)

#	Wed 6/22	Total Time Reporting Code	Type	Override Rate	Business Unit	Combination Code	ChartFields
21		16.000 022 - Regular Hours (Auxiliary)	Hours		UOFAB		ChartFields

ChartField Detail

Combination Code

Search Options
 Combination Codes
 Speed Types Search

ChartField Detail

Account	Fund Code	Department	Program Code	Class Field	Project/Grant	Sponsor
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Ok Cancel

Search Speed Types

SpeedType Key

Search by ChartFields

Account	<input type="text"/>
Fund Code	<input type="text"/>
Department	<input type="text"/>
Program Code	<input type="text"/>
Class Field	<input type="text"/>
Project/Grant	<input type="text"/>
Sponsor	<input type="text"/>

Search Clear Cancel

Search Speed Types

SpeedType Key

Search by ChartFields

Account	<input type="text"/>
Fund Code	E5039
Department	150800
Program Code	0
Class Field	0
Project/Grant	<input type="text"/>
Sponsor	<input type="text"/>

Search Clear Cancel

ChartField Detail

Select	SpeedType	Account	Department	Project/Grant	Fund Code	Program Code	Class Field	Sponsor
1	Select	01338	150800		E5039	0	0	

ChartField Detail

Combination Code

Search Options
 Combination Codes
 Speed Types Search

ChartField Detail

Account	Fund Code	Department	Program Code	Class Field	Project/Grant	Sponsor
500001	E5039	150800	0	0		

Ok Cancel

16.000	022 - Regular Hours (Auxiliary)	Hours	UOFAB	000028214	ChartFields
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Step 4: Click the Submit button.

Step 5: Click OK

**Timesheet
Submit Confirmation**

The Submit was successful.
Time for the Week of 2016-06-16 to 2016-06-22 is submitted

Step 6: Add Comments

Step 7: Click the Return to Select Employee link.

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

Date	Reported Status	Total TRC	Description	Comments
06/16/2016	Submitted	8.000 022	Regular Hours (Auxiliary)	
06/17/2016	Submitted	8.000 022	Regular Hours (Auxiliary)	

| [Manager Self Service](#) | [Time Management](#)



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.