

Recommendation from the EFS Systems Architecture Committee

Recommendation Number: 4

Title: Shift combo codes to “behind the scenes” functionality

Date: August 29, 2011

Recommendation

The combo code functionality used by EFS and HRMS should be put “behind the scenes” so EFS and HRMS users only need to use chartstrings to interact with the systems and one another.

Rationale

Combo codes serve no purpose for those working with EFS and HRMS – they serve strictly a system need. The need to look up combo codes, which are randomly assigned, creates extra work that does not add value to the users. It also creates a barrier in the working relationship between finance and payroll staff. The extra time and potential for error is magnified by the fact that salary and fringe expenses are such a large part of most unit budgets. It can be especially challenging for research intensive areas where faculty and staff are paid on many different chartstrings. We have learned that a customization was implemented in the Student system that put combo codes “behind the scenes.” Therefore, we assume it can also be done in HRMS. We believe there are four places where changes will be needed: distribution, pay entry, additional pay and HSA pages. For the customization, the Account code should be inferred from the Jobcode. By doing so, it would not need to be entered by the users.

The attached screen prints illustrate the ability to enter the chartstring into the Scholarship Automation screen in the Student system, as opposed to the combo code required in HRMS.

Impact for departmental users (ranking: High, Medium, Low)

Number of department users affected by this recommendation: **High**

Amount of workload reduced if this recommendation is implemented: **High**

Committee Vote: 10 yes, 0 no, 0 abstain

Name	Representing	Vote
Wendy Berkowitz	University Services	Yes
Gina Danyluk	AHC	Yes
Karen Dewanz	CLA	Yes
Sarah Goulet	Veterinary Medicine	Yes
Jill Merriam	SVP Acad Affairs/Provost	Yes
Anne Mockovak	Medical School	Yes

Dave Pappone	CSE	Yes
Tom Quinn	U Stores	Yes
Milly Theis	CFANS	Yes
Michelle Wills	Carlson School	Yes

Scholarship Batch Information

Institution: UMNTC Univ of Minnesota, Twin Cities [Click here for help with this page.](#)
 Aid Year: 2012 2011-2012

[Batch Detail](#)

Batch Number: 1875
 Batch Status: On Hold
 Term: Fall/Spring May Session/Summer

Item Type: 940000001063 CHRLS PhD Fellowship

- OR -

Fund Code	DeptID	Program Code	Project ID	Account	Chartfield 1	Chartfield 2	CS
1000	11297	20471		800102			

[Search for Item Type](#) [Create Item Type](#)

[Add Students from File](#)

Student Information			
EmpID	Name	Fall \$	Spring \$
1		0.00	0.00

[Update Batch Status to Pending](#) [Update Batch Status to Canceled](#) [Delete Batch](#)

[Save](#)

[Add](#) [Update/Display](#)

Customized page. User may enter Item Type or EFS Chartstring. User is not required to use the EFS Combo code to complete this transaction. (User does not see combo code within Scholarship automation or reporting.)

Combination Code Table

SetID: UMFIN
 Process Group: UM_HCM_CS
 GL Combination Code: 1000112970000925704

Combination Code Detail																									
*Effective Date:	06/11/2007																								
*Description:	Fellowships-Grants-Scholarship																								
Short Desc:	FellGrtSch																								
*Status:	Active																								
<table border="1"> <thead> <tr> <th colspan="2">Chartfield Detail</th> </tr> </thead> <tbody> <tr> <td>Fund Code :</td> <td>1000</td> </tr> <tr> <td>DeptID :</td> <td>11297</td> </tr> <tr> <td>Program Code :</td> <td>20471</td> </tr> <tr> <td>Project :</td> <td></td> </tr> <tr> <td>Account :</td> <td>800102</td> </tr> <tr> <td>Fin EmpID :</td> <td></td> </tr> <tr> <td>Chartfield 1 :</td> <td></td> </tr> <tr> <td>Chartfield 2 :</td> <td></td> </tr> <tr> <td>Cost Share :</td> <td></td> </tr> <tr> <td>Fund Affiliate :</td> <td></td> </tr> <tr> <td>DeptID Affiliate :</td> <td></td> </tr> </tbody> </table>		Chartfield Detail		Fund Code :	1000	DeptID :	11297	Program Code :	20471	Project :		Account :	800102	Fin EmpID :		Chartfield 1 :		Chartfield 2 :		Cost Share :		Fund Affiliate :		DeptID Affiliate :	
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[Save](#) [Return to Search](#) [Notify](#)

[Print](#) [Include History](#)

Combo code is not the same as Item Type.
Combo Code = A system placeholder for ChartField value detail. Allows PeopleSoft Student and HR systems to communicate with PeopleSoft Financials.
Item Type = "product number" for debit and credits to student account. Item types are 12 digit numbers that carry the information necessary for many processes throughout PeopleSoft Campus Solutions.

UNIVERSITY OF MINNESOTA HEPCOM

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

Distribute UM

Andrea Wills EMP ID: 3545344 Empl Rcd #: 1

Effective Date: 07/01/2011 Employee Type: Hourly Std Hrs/Wk: 0.01
Compensation Rate: 10.00 Hourly UMN Pay Period Hours: 0.02
Default Job Code: 2782 Account: 700402

Effective Date: 06/07/2010 Enter Multi Rates

COMBO CODE Earn Cd Encumb
100011259000918825 View ChartFields URG R

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Previous in List Next in List Notify Update Display Include History

Customized page. Prior to EFS implementation page contained CUFS chartfields, which totaled 19 characters. EFS chartstring exceeds 19 characters, so Combo Code field replaced CUFS chart fields. (PeopleSoft allows Combo Code to be up to 25 characters.)

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Save Return to Search Previous in List Next in List

Look Up

SetID: UMFN

Combination Code: begins with
Description: begins with
Fund Code: begins with 1000
DeptID: begins with 11259
Program Code: begins with 20237
Project: begins with
Account: begins with
Fin EmplID: begins with
Chartfield 1: begins with
Chartfield 2: begins with
Cost Share: begins with

Look Up Clear Cancel Basic Lookup

Combo Code begins with Fund-DeptID and then remaining 10 characters are random.

If User uses look up functionality, they can enter the EFS Chartstring to find the correct Combo Code.

UNIVERSITY OF MINNESOTA HEP/COM

Favorites Main Menu > Workforce Administration > Job Information > Job Data

Andrea Wills

Effective Date: Compensation Rate

Effective Date: COMBO 1000112590000

Job Data

Save Return

Look Up

SetID: UMFN

Combination Code: begins with

Description: begins with

Fund Code: begins with 1000

DeptID: begins with 11259

Program Code: begins with 20237

Project: begins with

Account: begins with

Fin EmplID: begins with

Chartfield 1: begins with

Chartfield 2: begins with

Cost Share: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-10 of 10 Last

Combination Code	Description	Fund Code	DeptID	Program Code	Project	Account	Fin EmplID	Chartfield 1	Chartfield 2	Cost Share
1000112590000888047	Salaries - Civil Service	1000	11259	20237	(blank)	700501	(blank)	(blank)	(blank)	(blank)
1000112590000890596	Salaries-Wk Study UG Academic	1000	11259	20237	(blank)	704150	(blank)	(blank)	(blank)	(blank)
1000112590000890640	Salaries-Wk Study AFSCME	1000	11259	20237	(blank)	705250	(blank)	(blank)	(blank)	(blank)
1000112590000897095	Salaries - Teamsters/Law Enfr	1000	11259	20237	(blank)	700503	(blank)	(blank)	(blank)	(blank)
1000112590000913740	Salaries-Wk Study UG Non-Acad	1000	11259	20237	(blank)	704250	(blank)	(blank)	(blank)	(blank)
1000112590000915431	Salaries - AFSCME	1000	11259	20237	(blank)	700502	(blank)	(blank)	(blank)	(blank)
1000112590000918382	Salaries - Undergrad Academic	1000	11259	20237	(blank)	700401	(blank)	(blank)	(blank)	(blank)
1000112590000918826	Salaries - Undergrad Non-Acad	1000	11259	20237	(blank)	700402	(blank)	(blank)	(blank)	(blank)
1000112590000919466	Salaries-Wk Study Tms/r/LawEnf	1000	11259	20237	(blank)	705350	(blank)	(blank)	(blank)	(blank)
1000112590000925663	Salaries - Trades	1000	11259	20237	(blank)	700504	(blank)	(blank)	(blank)	(blank)

Each Combo Code is assigned to a specific EFS chartsting including the account code. User must pick the Combo Code with the appropriate account code for the employee's jobcode.