

# Combination Editing

## Table of Contents

This Job Aid covers the process of Combination Editing in the upgraded ONEPeralta system.

Combination Editing	Page
Log on to ONEPeralta	2
Create Combination Definition	5
Create / Update Combination Rules	8
Create / Update Combination Group & Add / Update Ledger Groups	14
Build and Review Combination Data	22

# Log on to ONEPeralta

## Sign in

1. Enter into your browser > one.peralta.edu
2. Enter > Peralta email **User ID** and **Password**
3. Click > **Sign In**



ORACLE<sup>®</sup>  
PEOPLESOFT

User ID

Password

Select a Language

English

Sign In

Enable Screen Reader Mode

[Set Trace Flags](#)

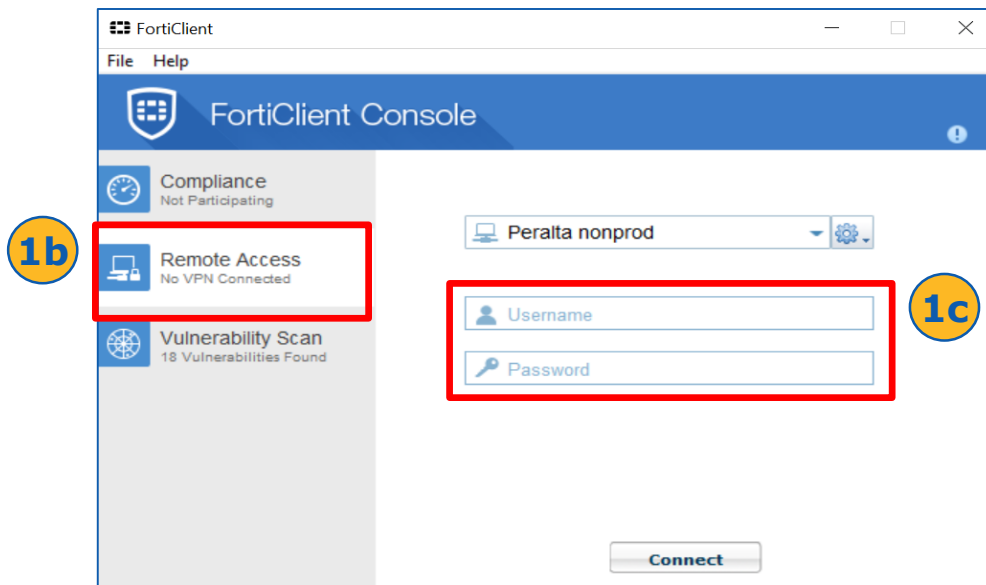
# Log on to ONEPeralta (cont'd)

## Turn on VPN

If you are having trouble logging into ONEPeralta, you may need to connect to Peralta's **Virtual Private Network (VPN)** before you are able to log in to ONEPeralta. Follow the steps below to connect to VPN, then try logging in again.

Turn on VPN using one of two methods:

1. Desktop (recommended method)
  - a. Open > **FortiClient**
  - b. Select > **Remote Access**
  - c. Enter > Peralta email **Username** and **Password**

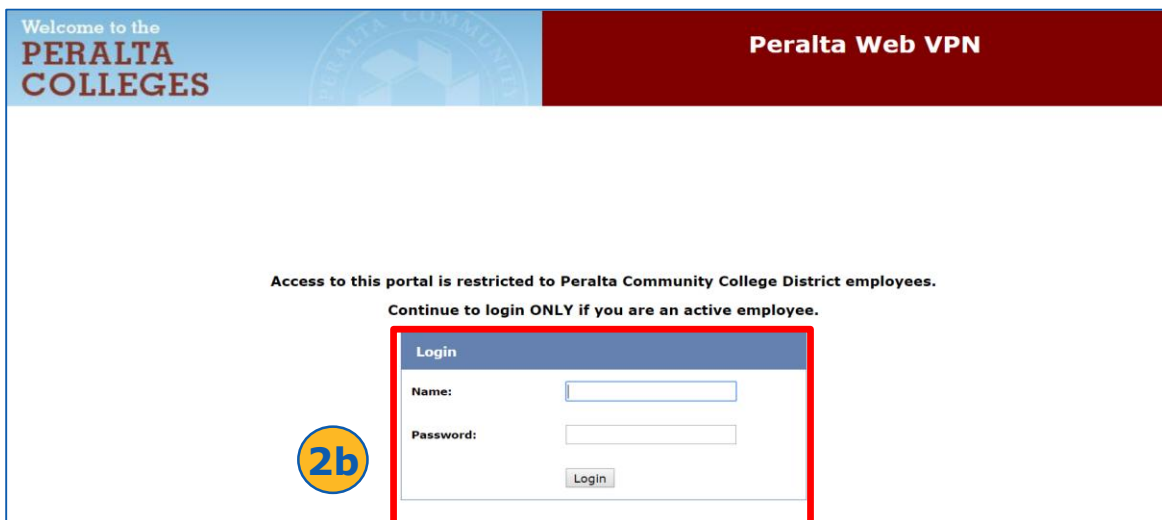


# Log on to ONEPeralta (cont'd)

## Turn on VPN

### 2. Web / Browser

- a. Enter into your browser > <https://access.peralta.edu/>
- b. Enter > Peralta email **Username** and **Password**



Welcome to the  
**PERALTA  
COLLEGES**

**Peralta Web VPN**

Access to this portal is restricted to Peralta Community College District employees.  
Continue to login **ONLY** if you are an active employee.

**2b**

**Login**

Name:

Password:

Login

# Combination Editing

## Create Combination Definition

**ChartField Combination Definition** page defines the combination of ChartFields to edit (e.g. Location and Cost Center). This section reviews the process of creating a new Combination Definition.

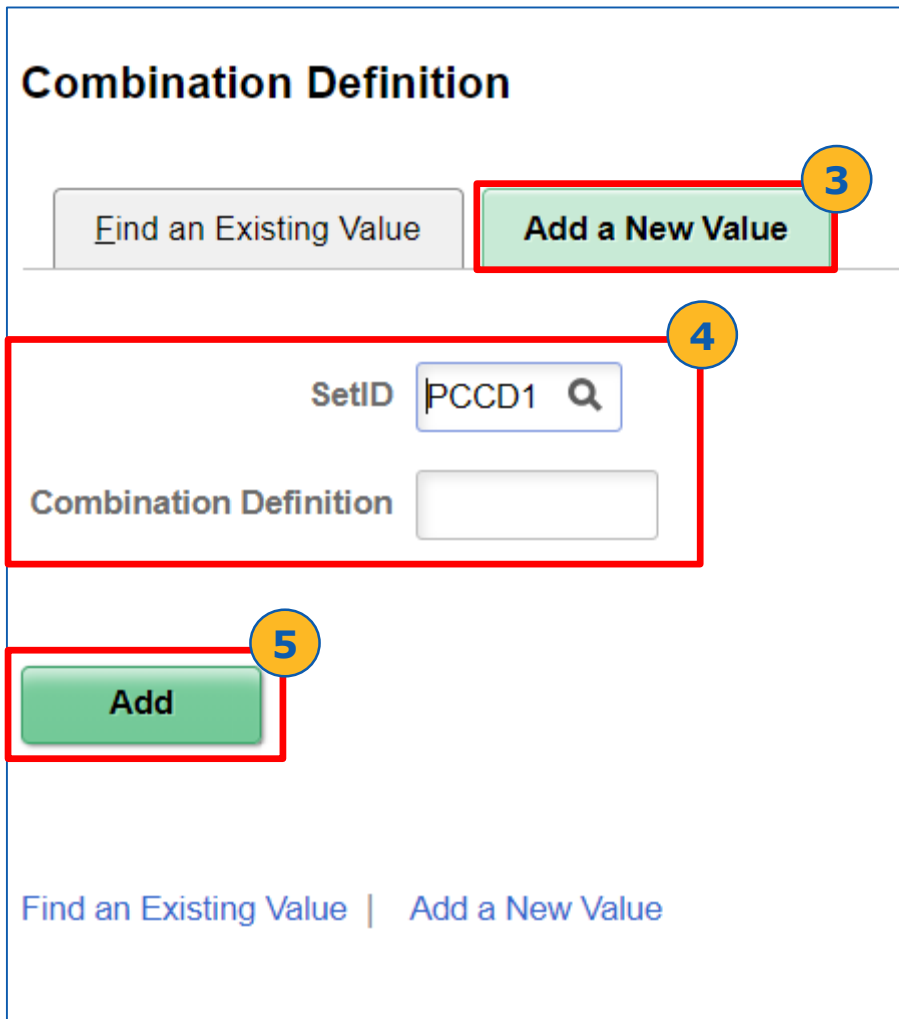
1. Click > **NavBar** icon > **Navigator**
2. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Combination Definition**



# Combination Editing

## Create Combination Definition

3. Click > **Add a New Value**
4. Enter > **SetID** > **Combination Definition**
5. Click > **Add**



**Combination Definition**

Find an Existing Value | **Add a New Value** 3

SetID   4

Combination Definition

**Add** 5

Find an Existing Value | Add a New Value

# Combination Editing

## Create Combination Definition

6. Enter > **Description** > **Long Description** (optional)
7. Select > **ChartField** from dropdown
8. Click > **Save**. A New Combination Definition for ChartFields is created

**ChartField Combination Editing Definition**

SetID PCCD1 Combination Definition UMPQU

\*Description

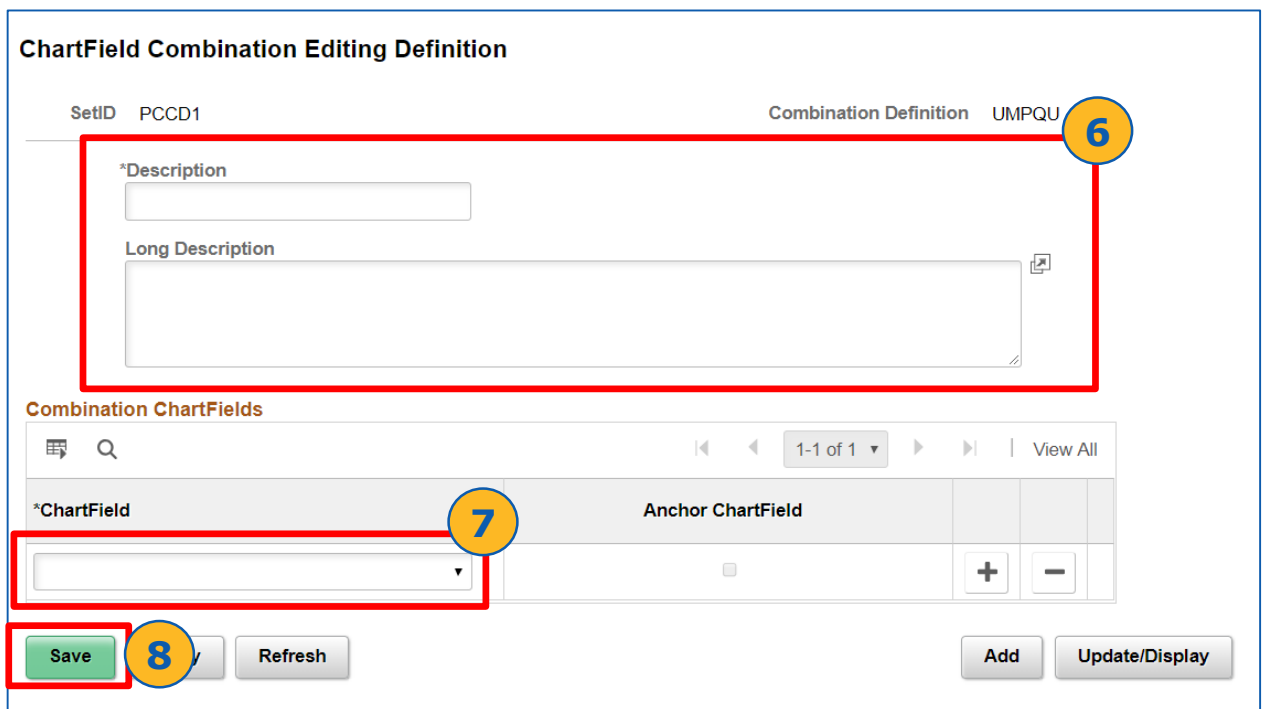
Long Description

**Combination ChartFields**

☰ 🔍 1-1 of 1 View All

*ChartField	Anchor ChartField		
<input type="text"/>		+	-

**Save** **Refresh** **Add** **Update/Display**



# Combination Editing

## Create / Update Combination Rules

**ChartField Combination Rule Definition** includes the anchor ChartField and non-anchor ChartField values to include in the rule. This section reviews creating and updated these rules.

1. Click > **NavBar** icon > **Navigator**
2. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Combination Rule**

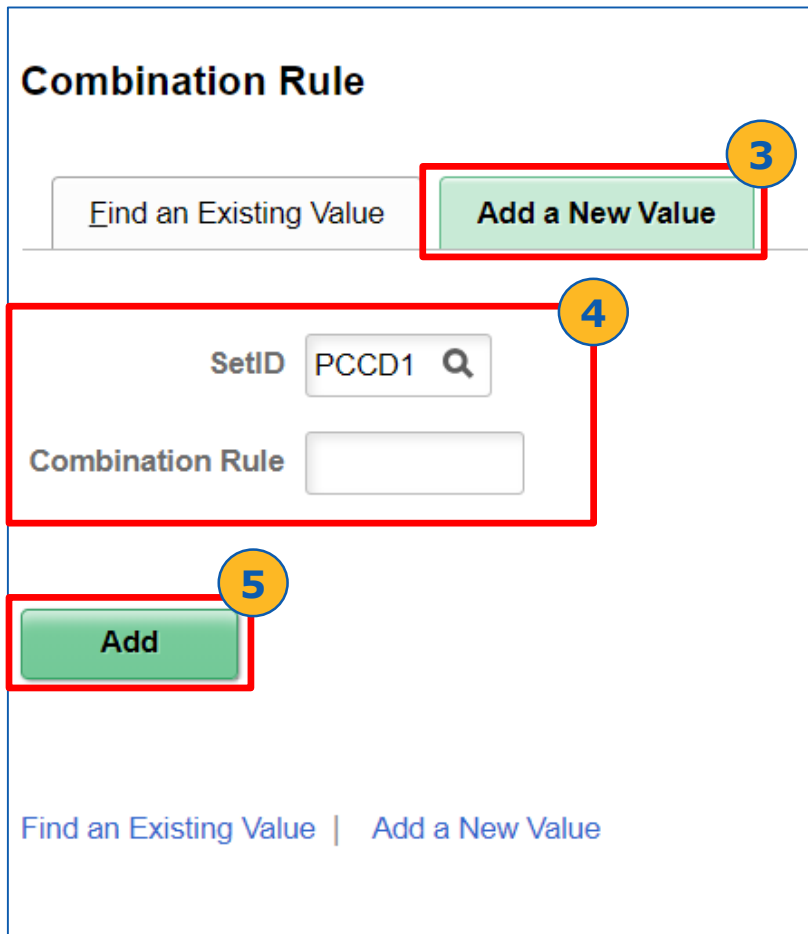




# Combination Editing

## Create / Update Combination Rules

3. Click > **Add a New Value**
4. Enter > **SetID** > **Combination Rule**
5. Click > **Add**



The screenshot shows a web interface for editing combination rules. At the top, the title "Combination Rule" is displayed. Below the title are two buttons: "Find an Existing Value" and "Add a New Value". The "Add a New Value" button is highlighted with a red box and a yellow circle containing the number 3. Below these buttons is a form with two fields: "SetID" and "Combination Rule". The "SetID" field contains the text "PCCD1" and a search icon. The "Combination Rule" field is empty. This entire form area is highlighted with a red box and a yellow circle containing the number 4. Below the form is a green "Add" button, which is also highlighted with a red box and a yellow circle containing the number 5. At the bottom of the interface, there is a navigation bar with the text "Find an Existing Value | Add a New Value".

# Combination Editing

## Create / Update Combination Rules

6. Click > **Rule Definition**
7. Enter > **Description** > **Long Description** (optional) > **Effective Date From** > **Effective Date To** > **Combination Definition**
8. Select > **Open Effective Date To** box
9. Select > **Effective Date for Prompting:** Current Date
10. Select > **Value Required** box, if value is required by default.

The screenshot shows the 'Rule Definition' form for 'ChartField Combinations'. The form includes fields for SetID (PCCD1), Combination Rule (UMPQU), \*Description, Long Description, Effective Date From (05/21/2018), \*Combination Definition, Effective Date To (01/01/2099), and Effective Date for Prompting (05/21/2018). There are buttons for Save, Notify, Add, and Update/Display. A blue arrow points from the bottom of this form to the table below.

Non-Anchor ChartField Option	
ChartField	<input checked="" type="checkbox"/> Value Required
Location	<input type="checkbox"/>

Select the **Value Required** check box for non-anchor ChartFields to specify that any nonblank valid value is required. When you select this check box, the system restricts you from entering values or tree nodes in the rule for the related non-anchor ChartField. Selecting this check box also provides an easy way for you to require a valid value for a ChartField without having to define each valid value in the rule.

# Combination Editing

## Create / Update Combination Rules

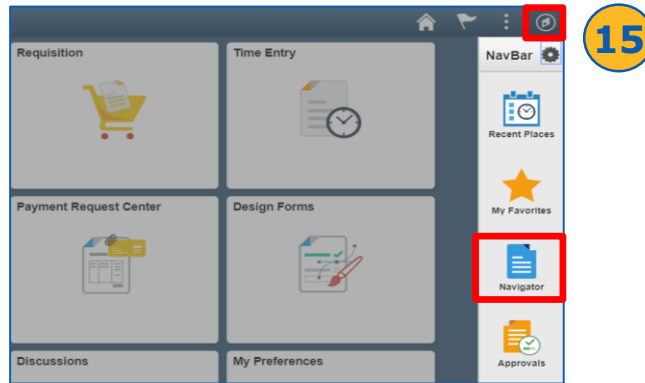
11. Click > **ChartField Combinations**
12. Enter Anchor ChartField values > **Order:** Ascending > **How Specified** > **Tree** > **Node/Value**
13. Enter Non-Anchor ChartField values > **How Specified** > **Tree**
14. Click > **Save**

The screenshot shows the 'ChartField Combinations' configuration page. At the top, the 'ChartField Combinations' tab is highlighted with a red box and a yellow circle containing the number 11. Below this, the 'Anchor ChartFields' section is highlighted with a red box and a yellow circle containing the number 12. This section includes a 'How Specified' dropdown menu with 'Selected Tree Nodes' selected, and a 'Chartfield values / Tree nodes' table with a search bar and navigation controls. The 'Non-Anchor ChartFields' section is also highlighted with a red box and a yellow circle containing the number 13, showing a similar 'How Specified' dropdown and table. At the bottom left, the 'Save' button is highlighted with a red box and a yellow circle containing the number 14. The bottom right contains 'Add' and 'Update/Display' buttons. The breadcrumb at the bottom reads 'Rule Definition | ChartField Combinations'.

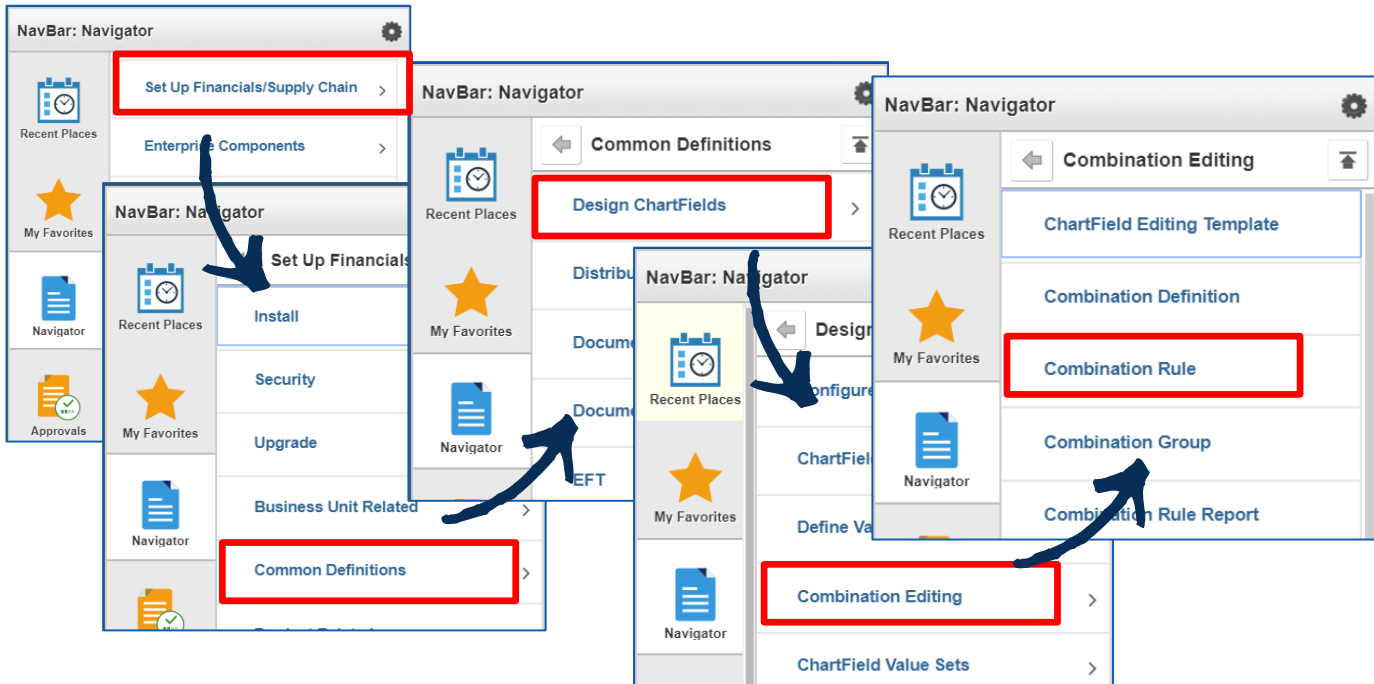
# Combination Editing

## Create / Update Combination Rules

15. To update Combination Rules, Click > **NavBar** icon > **Navigator**
16. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Combination Rule**



16



# Combination Editing

## Create / Update Combination Rules

17. Click > **Find an Existing Value**
18. Enter > **Search Criteria**
19. Click > **Search**
20. Select > **Combination Rule** you would like to update
21. Repeat > **Steps 6-14** as needed to update the Combination Rule

### Combination Rule

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

Find an Existing Value
Add a New Value

▼ Search Criteria

SetID =

Combination Rule begins with

Search
Clear
Basic Search 
Save Search Criteria

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

Search Results

View All 1-20 of 20

SetID	Combination Rule	Description
PCCD1	ALAMEDA	Alameda Cost Centers with Locs
PCCD1	ANY_ACT	Misc ObjCd with Any Activity
PCCD1	BERKELEY	BCC - Cost Center and Loc
PCCD1	CENTRAL_SU	Central Support DO Cost Center
PCCD1	COMMON	Common Cost Centers and Locs
PCCD1	DEBT_SVC	Debt Svc Obj Cd with xxx Act
PCCD1	DEPR	Depr ObjCd with Phys Prop Act

# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

**ChartField Combination Group** page links the Definition and Rules together in a Combination Group and designate the Combination Group to a ledger group.

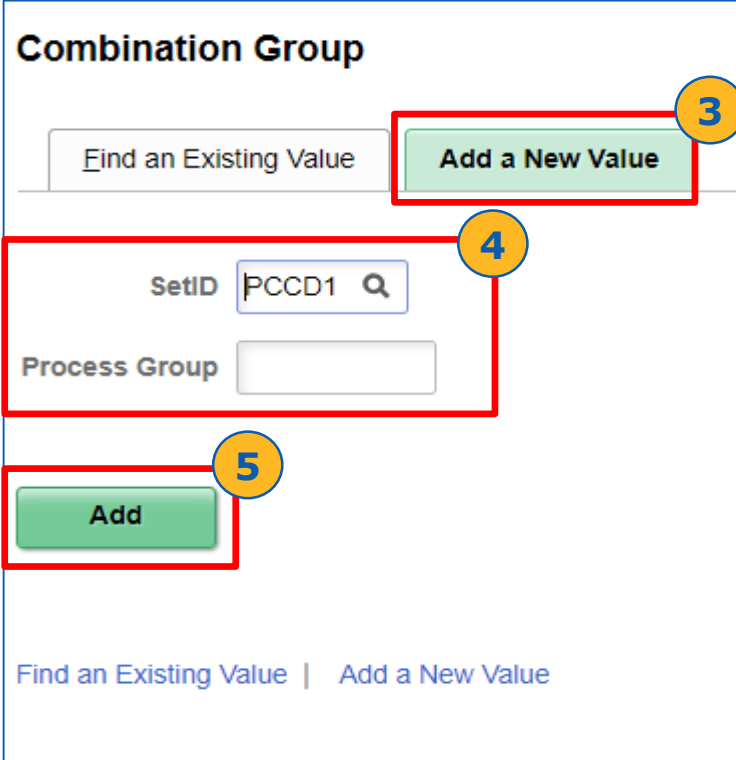
1. Click > **NavBar** icon > **Navigator**
2. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Combination Group**



# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

3. Click > **Add a New Value**
4. Enter > **SetID** > **Process Group**
5. Click > **Add**



The screenshot shows a web form titled "Combination Group". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". A red box highlights the "Add a New Value" button, with a yellow circle containing the number 3 next to it. Below these buttons, there are two input fields: "SetID" and "Process Group". The "SetID" field contains the text "PCCD1" and has a search icon to its right. A red box highlights both the "SetID" and "Process Group" fields, with a yellow circle containing the number 4 next to it. Below the "Process Group" field, there is a green "Add" button. A red box highlights this button, with a yellow circle containing the number 5 next to it. At the bottom of the form, there are two links: "Find an Existing Value" and "Add a New Value".

# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

6. Enter > **Description** > **Long Description** (optional) > **Combination Definition**
7. Select > **Combo Editing Option** > **Anchor Values Not In Rules** > **Combination Group Defines**
8. Enter > **Combination Rule** > (+) if multiple rules required
9. Click > **Save**

**ChartField Combination Editing Group**

SetID PCCD1      Process Group UMPQU

\*Description

Long Description

\*Combination Definition

\*Combo Editing Option Combo Data Table  User Defined

\*Anchor Values Not In Rules Mark Valid

\*Combination Group Defines Valid Combinations

**Combination Rule**

*Combination Rule	Description
<input type="text"/>	

+    -

Save
Notify
Refresh

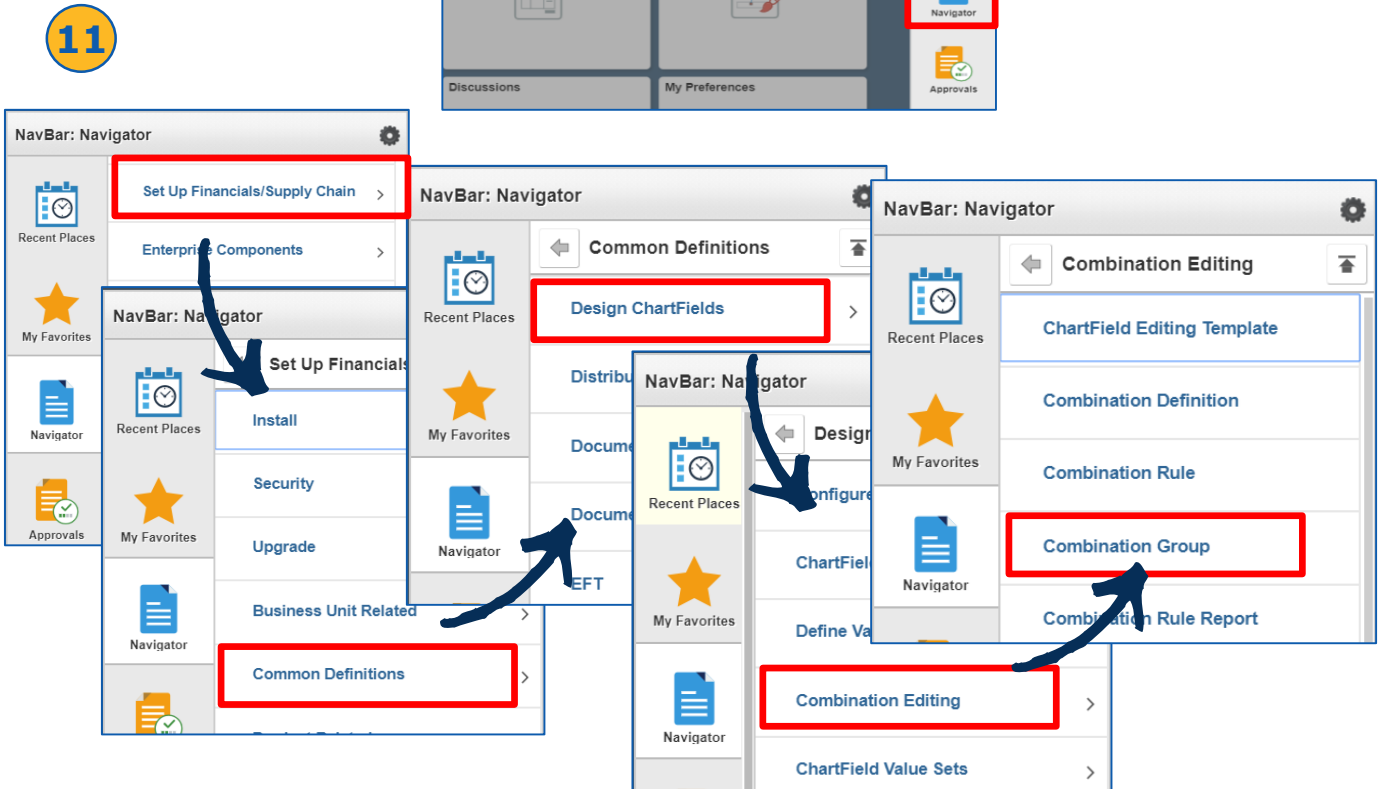
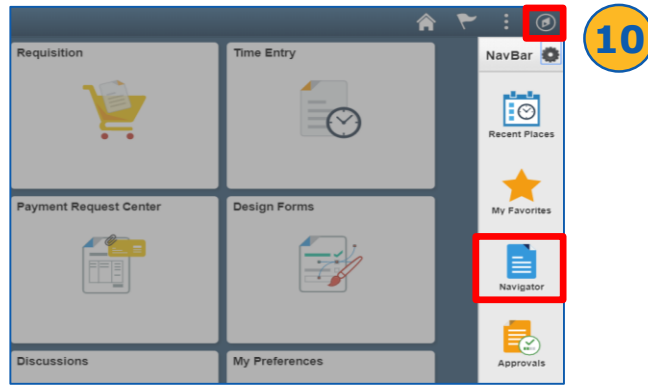
Add
Update/Display



# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

10. To update Combination Group, Click > **NavBar** icon > **Navigator**
11. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Combination Group**



# Combination Editing

## Create / Update Combination Group & Add / Update Ledger Groups

12. Click > **Find an Existing Value**
13. Enter > **Search Criteria**
14. Click > **Search**
15. Select > **Combination Group** you would like to update
16. Repeat > **Steps 6-9** as needed to update the Combination Group

### Combination Group

Enter any information you have to **12** Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

**13** Search Criteria

SetID =

Process Group begins with

Search
Clear
Basic Search
Save Search Criteria

Find an Existing Value | Add a New Value

Search Results

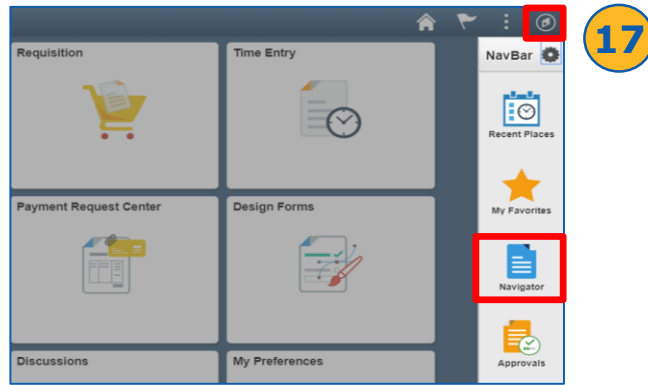
View All 1-5 of 5

SetID	Process Group	Description
PCCD1	COSTLOC	Cost Center and Location Rules
PCCD1	FUNDACCTLN	Object Code Fund and Acct Line
PCCD1	OBJECT	Object Code and Activity Rules
PCCD1	PRJFDOBJ	Project, Fund and Object Codes
PCCD1	PROGPROJ	Object Code Program Project

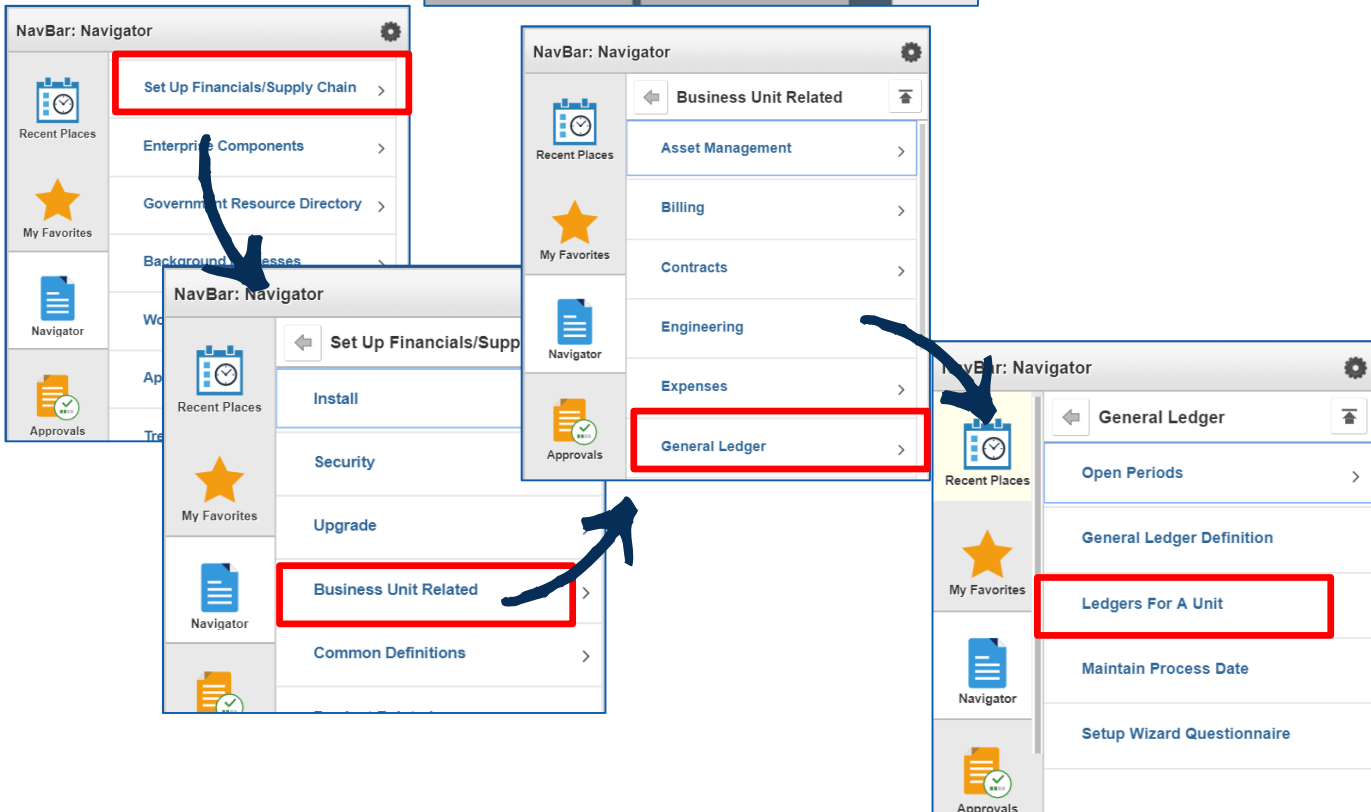
# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

17. Click > **NavBar** icon > **Navigator**
18. Click > **Set Up Financials/Supply Chain** > **Business Unit Related** > **General Ledger** > **Ledgers for A Unit**



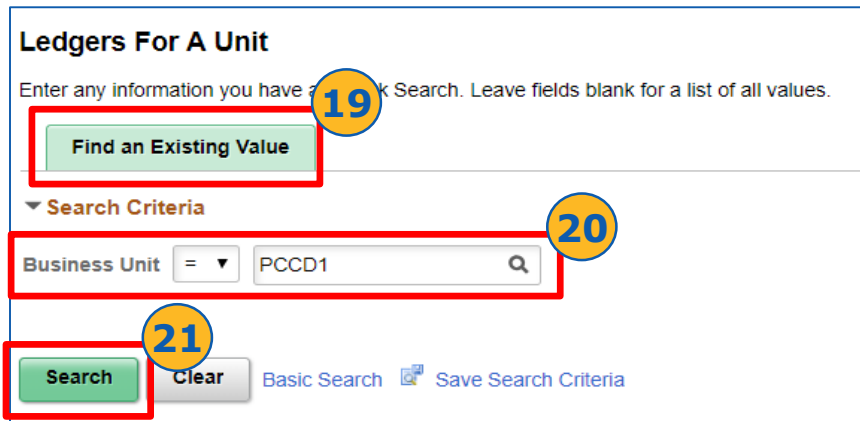
18



# Combination Editing

## Create / Update Combination Group & Add / Update Ledger Groups

19. Click > **Find an Existing Value**
20. Select > **Business Unit**
21. Click > **Search**



**Ledgers For A Unit**

Enter any information you have to narrow your search. Leave fields blank for a list of all values.

**19** Find an Existing Value

▼ Search Criteria

**20** Business Unit = PCCD1

**21** Search Clear Basic Search Save Search Criteria

# Combination Editing

Create / Update Combination Group & Add / Update Ledger Groups

22. Click > **Journal Edit Options**
23. Select > **Process Group** > **Transaction Source Option: All Transaction Sources**
24. Click > **Save**

Business Unit PCCD1

Detail Ledgers

Ledger Group ACTUALS

Document Type

\*Journal Balance Option Default to Higher Level Value

\*Journal Edit Errors Option Default to Higher Level Value

\*Journal Amount Errors Option Default to Higher Level Value

\*Control Total Option Default to Higher Level Value

Position Accounting

\*Journal Date < Open From Date Default to Higher Level Value

\*Journal Date > Open To Date Default to Higher Level Value

ChartField Combo Edit

Process Group	Transaction Source Option		
COSTLOC	All Transaction Sources	+	-

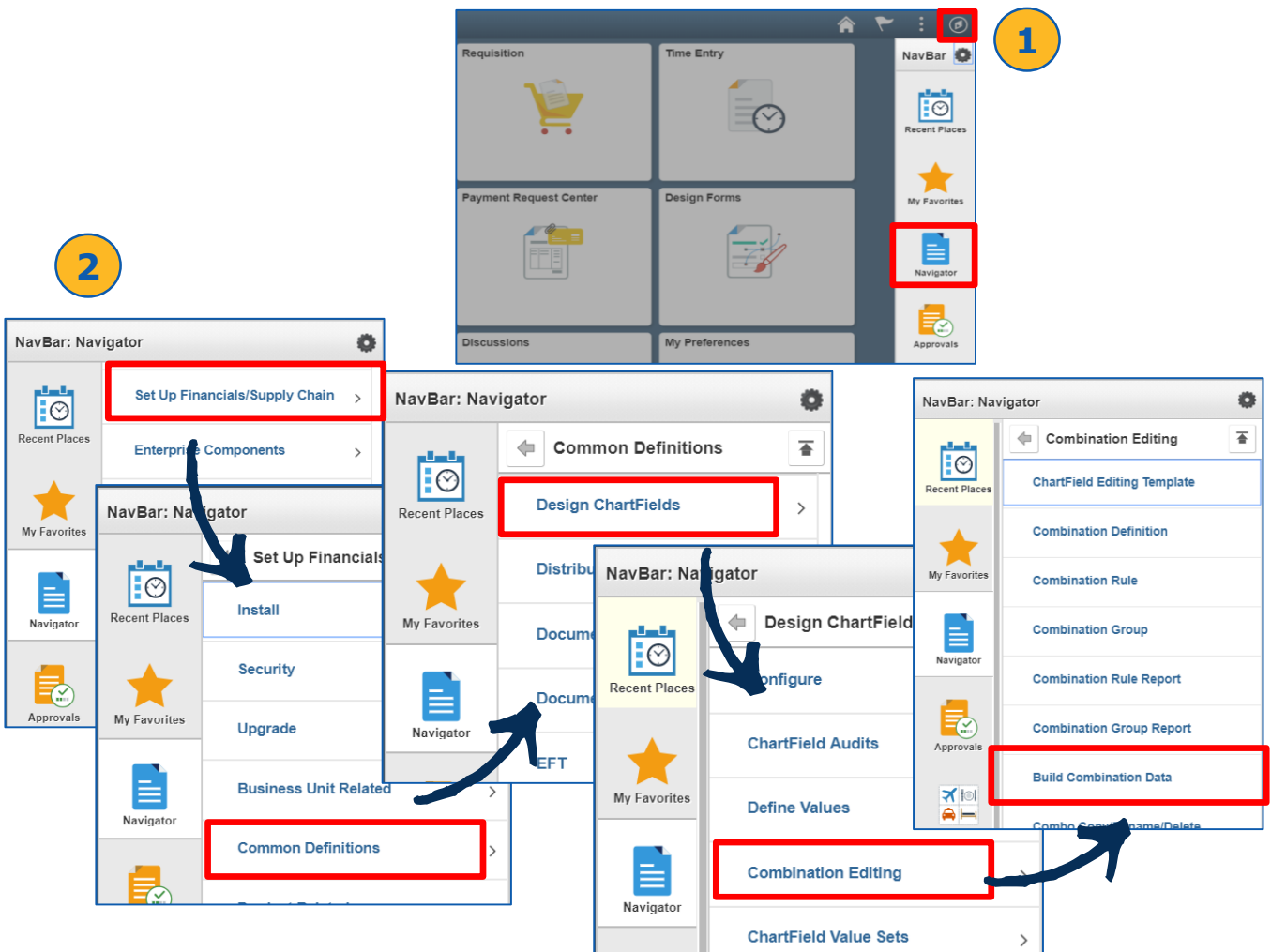
Save Return to Search Notify

# Combination Editing

## Build and Review Combination Data

The **Build Combination Data** process builds the combination data in a table so that each time the transaction is validated, it looks for a valid/invalid combination in the table.

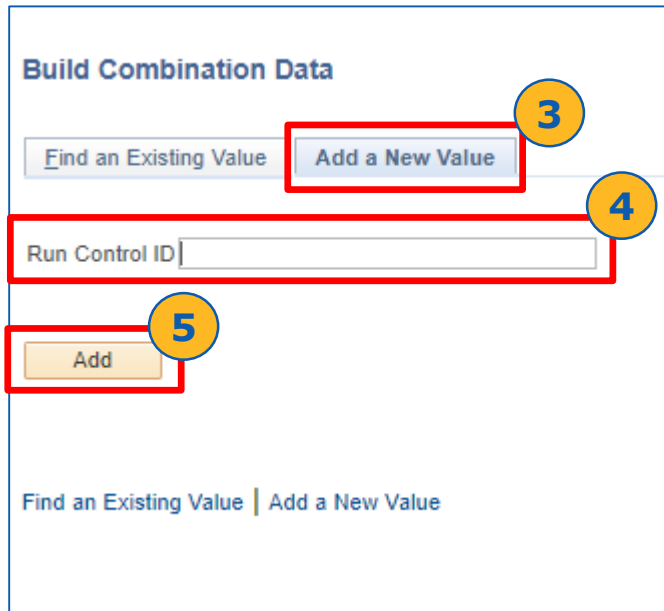
1. Click > **NavBar** icon > **Navigator**
2. Click > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Build Combination Data**



# Combination Editing

## Build and Review Combination Data

3. Click > **Add a New Value**
4. Enter > **Run Control ID**
5. Click > **Add**



The screenshot shows a web interface titled "Build Combination Data". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". A red box highlights the "Add a New Value" button, with a yellow circle containing the number 3 next to it. Below these buttons is a text input field labeled "Run Control ID". A red box highlights this field, with a yellow circle containing the number 4 next to it. Below the input field is a yellow "Add" button, which is also highlighted with a red box and a yellow circle containing the number 5. At the bottom of the interface, there is a navigation bar with the text "Find an Existing Value | Add a New Value".

# Combination Editing

## Build and Review Combination Data

6. Enter > **As of Date** > **Process Frequency: Always** > **Business Unit** > **Ledger Group** > **Build Option**
7. Select > **Use Wildcard in Combination** > **Use Active Users Only**
8. Click > **(+)** to add more rows for additional business units
9. Click > **Update** to update As Of Date on all rows
10. Click > **Save**
11. Click > **Run**
12. Select > **Process Name**
13. Click > **OK**

Build Combination Data Request

Run Control ID Test Report Manager Process Monitor

As of Date 05/22/2018 Update

Process Request Parameters

Request Number	Process Frequency	*Business Unit	*Ledger Group	Build Option	As of Date	Use Wildcard in Combination	Use Active Values Only	Run Publish Only	Publish to HRMS/SA
1	Don't	PCCD1		Build Data Table	01/01/1964	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Process Groups

Save Refresh Add Update/Display Run

Process Scheduler Request

User ID FUNC\_2 Run Control ID Test

Server Name Run Date 05/22/2018

Recurrence Run Time 4:36:38PM Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PS/FS Combo Edit Build	FS_CEBD	Application Engine	Web	TXT	Distribution

OK Cancel Refresh



# Combination Editing

## Build and Review Combination Data

14. Select > **Process Monitor**
15. Click > **Refresh** to update **Run Status:** Success and **Distribution Status:** Posted

Build Combination Data Request

Run Control ID Test      Report Manager      **Process Monitor** 14      Run

As of Date 05/22/2018 Update

Process Request Parameters Personalize | Find | View All | First 1 of 1 Last

Request Number	Process Frequency	*Business Unit	*Ledger Group	Build Option	As of Date	Use Wildcard in Combination	Use Active Values Only	Run Publish Only	Publish to HRMS/SA
1	Don't	PCCD1		Build Data Table	01/01/1964	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Process Groups

Save Notify Refresh Add Update/Display

**Process List**      Server List

View Process Request For

User ID       Type       Last       4 Days      Refresh 15

Server       Name       Instance From       Instance To

Run Status       Distribution Status        Save On Refresh

Process List 1-1 of 1 15 View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1601058		Application Engine	FS_CEBD	FUNC_2	05/22/2018 4:34:54PM PDT	Success	Posted	Details

Go back to Build Combination Data

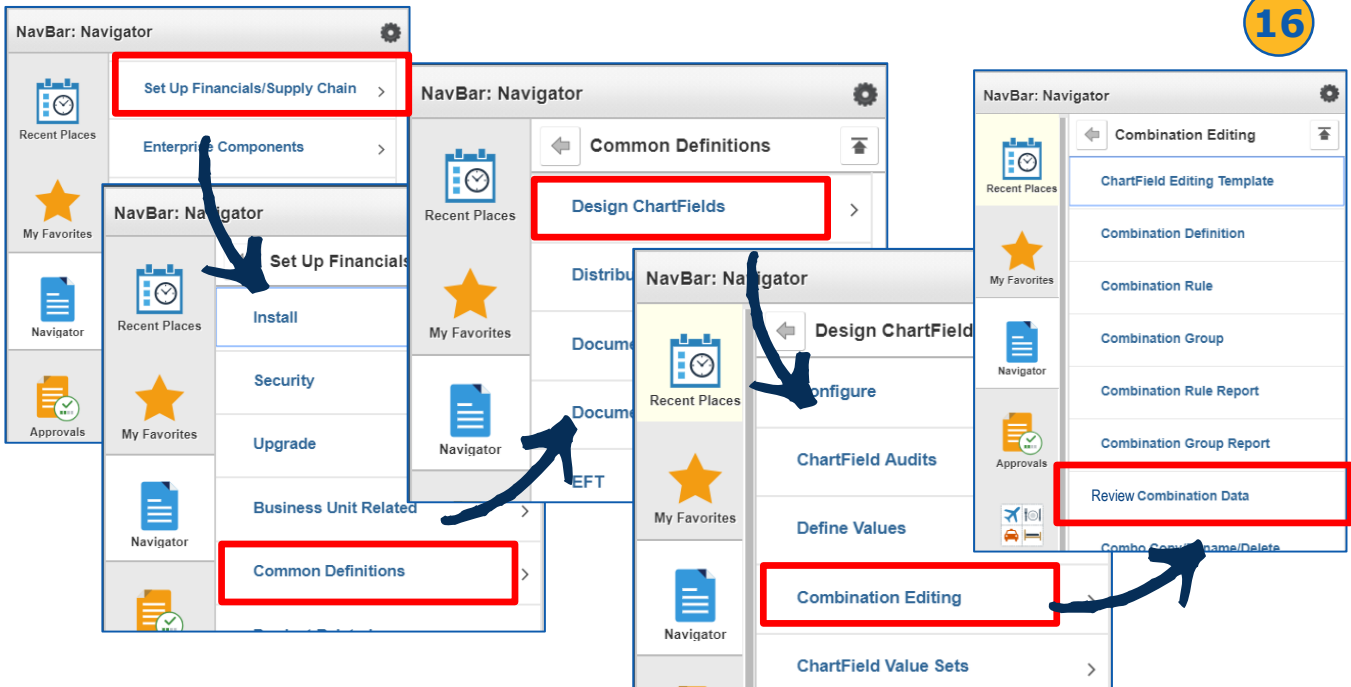
Save Notify

Process List | Server List

# Combination Editing

## Build and Review Combination Data

16. To Review, navigate > **Set Up Financials/Supply Chain** > **Common Definitions** > **Design ChartFields** > **Combination Editing** > **Review Combination Data**



# Combination Editing

## Build and Review Combination Data

17. Enter > **SetID** > **Group** > **Rule** > **Business Unit for Prompting**
18. Click > **Search**
19. Review > **Combination Data Values**

**Review Combination Data** 17

SetID: PCCD1  \*Group:   Rule:  Business Unit for Prompting:  18

**ChartField Values** 1-1 of 1 19

Location	Fund	Cost Ctr	Object Code	Program	Activity Suffix	Project	Accounting Line	Fund Affil	Product	Book Code	Stat	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>