Maintain ChartFields

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This Job Aid covers the process of creating and maintaining ChartFields in ONEPeralta.

Log on to ONEPeralta

Sign in

All ONEPeralta Users

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

Note Due to periodic system improvements and your evolving role within the system, the screenshots in this training may be different from what you will see when you log in to ONEPeralta.
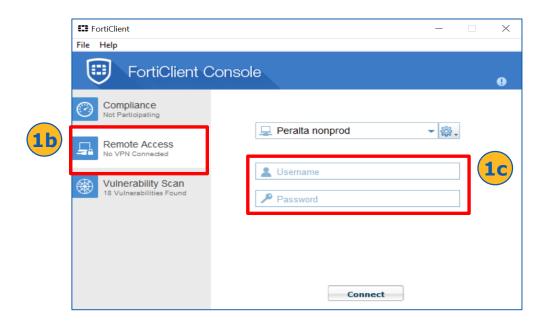
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

If you are having trouble logging into to 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**
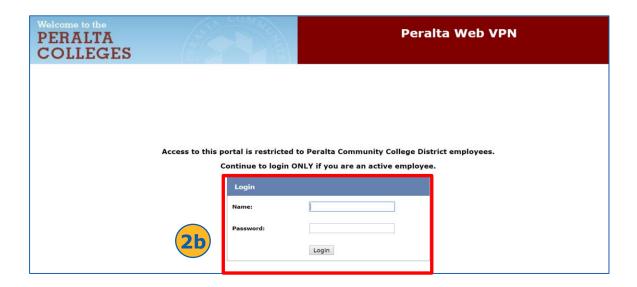
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

2. Web / Browser
   a. Enter into your browser > https://access.peralta.edu/
   b. Enter > Peralta email **Username** and **Password**
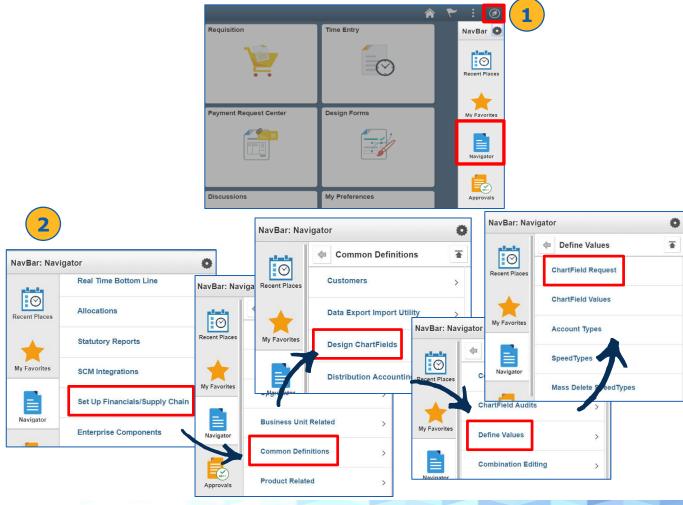
Maintain ChartFields

Request to Create / Update ChartField Values

New ChartFields are requested and created by the Budget department when an existing ChartField value does not meet a need to appropriately capture unique financial activity.

1. Click > **NavBar** icon > **Navigator**
2. Click > **Setup Financials/Supply Chain** > **Common Definitions > Design ChartFields > Define Values > ChartField Request**
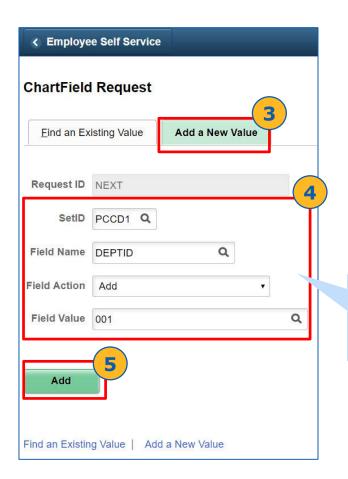
Maintain ChartFields

Request to Create / Update ChartField Values

3. Click > **Add a New Value**
4. Enter > **Set ID > Field Name > Field Action > Field Value**
5. Click > **Add**

> You have the choice of **Add** or **Update** for Field Action. **Add** will request a new ChartField, while **Update** will show pre-populated details of an existing ChartField that you can request to change.
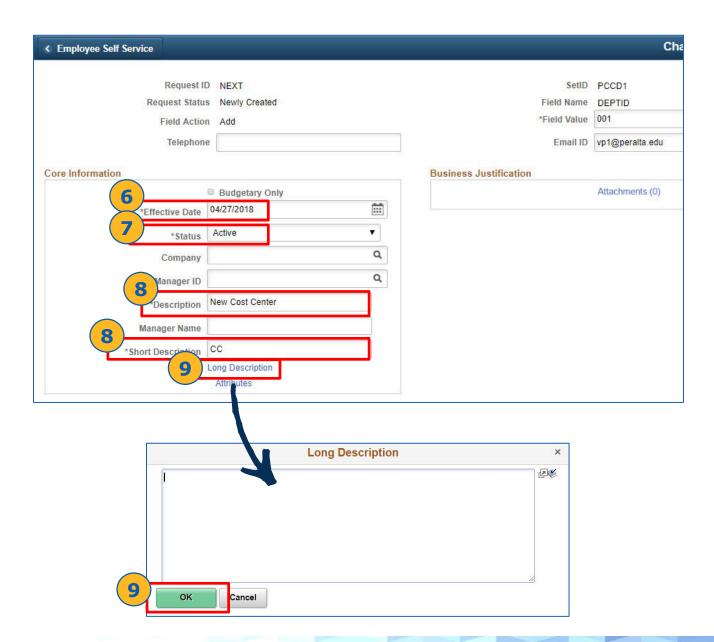
‹ Employee Self Service

ChartField Request

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

Request ID NEXT ④

SetID PCCD1 🔍

Field Name DEPTID 🔍

Field Action Add ▾

Field Value 001 🔍

⑤ **Add**

Find an Existing Value | Add a New Value

> Make sure you create a **Field Value** that does not match an existing value

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Maintain ChartFields

Request to Create / Update ChartField Values

6. Enter > **Effective Date** for the ChartField to be active
7. Enter > **Status: Active**
8. Enter (Required) > **Description** > **Short Description**
9. Enter (Optional) > **Long Description** > **OK**

Maintain ChartFields

Request to Create / Update ChartField Values

10. Click > **Attachments** > **Add Attachments**
11. Click > **Choose File** > **Select File** > **Open** > **Upload**
12. Enter > **Description**
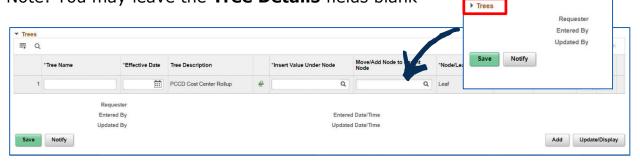13. Click > **OK**

Maintain ChartFields

Request to Create / Update ChartField Values

Note: You may leave the **Tree Details** fields blank

14. Enter > **Request Comments** to explain requesting this ChartField
15. Select > **Submit for Approval** as Request Action
16. Click > **Go**
17. Click > **View Approval Flow** to check workflow routing
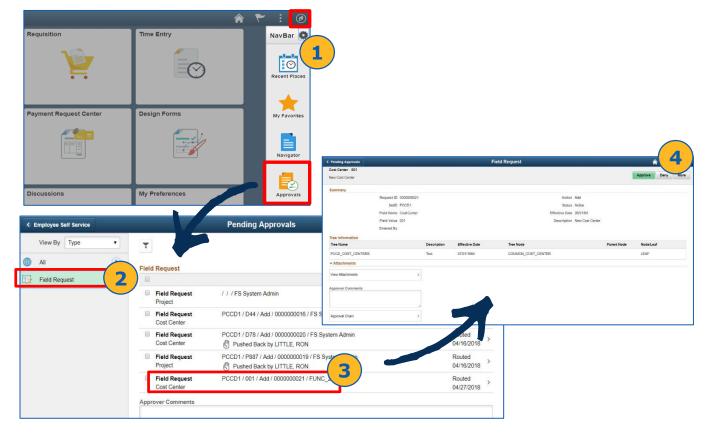
Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

After a user requests a ChartField, the appropriate approvers will see the request in their approvals. The Approval Workflow for ChartFields includes 2 levels of approval:

Level One – **Campus Business Manager** (Business Office)
Level Two – **District Finance**
Ad Hoc Approvers, if any

1. Click > **NavBar** icon > **Approvals**
2. Click > **Field Requests**
3. Select > Field Request to review
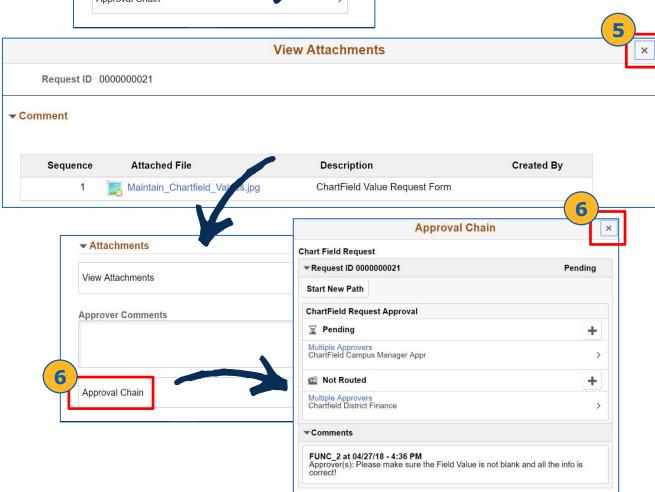4. Review > ChartField request details to make sure they are correct

Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

5. Click > **View Attachments** > **X** to close
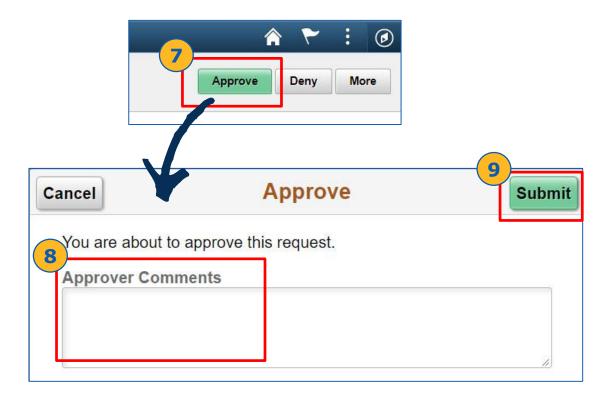6. Click (Optional) > **Approval Chain** > **X** to close

Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

Approve

7. Click > **Approve**
8. Enter (Optional) > **Approver Comments**
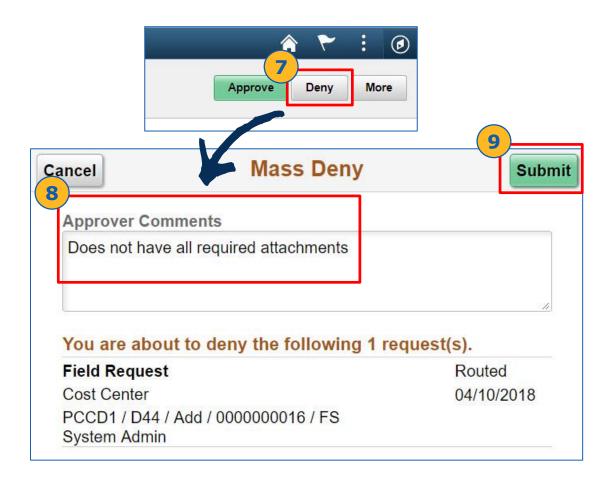9. Click > **Submit**

Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

If any details are incorrect, or if any supporting documents are missing, you should deny or pushback the request. **Deny will send the request back to the original requestor.**

Deny

7. Instead of clicking Approve, click **Deny** button at top right corner
8. Enter (Required) > **Approver Comments**
9. Click > **Submit**

Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

If any details are incorrect, you are the second approver, and the previous approver is able to correct it, **you can pushback the request.** This will send the request back to the previous approver.

Pushback

7. Instead of clicking Approve or Deny, click **More**
8. Click > **Pushback**
9. Enter (Required) > **Approver Comments**
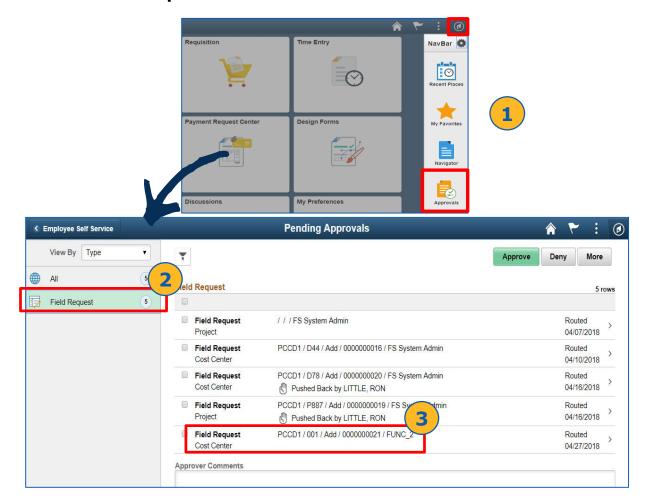10. Click > **Submit**

Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

If you think someone other than the Level One (**Campus Business Manager**) or Level Two (**District Finance**) approvers should review a ChartField request, you can add an Ad Hoc Approver to the Approval Chain.

Add Hoc Approver

1. Click **NavBar** > **Approvals**
2. Click > **Field Requests**
3. Click > **Field Request** to review
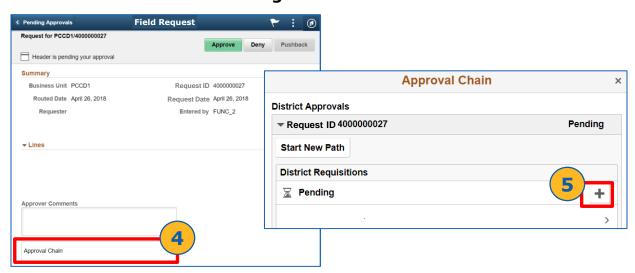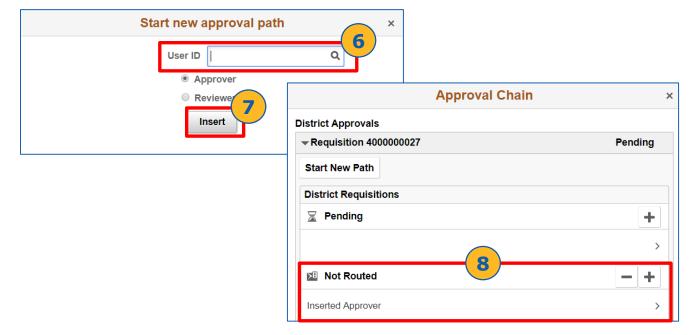
Maintain ChartFields

Approve / Deny / Pushback ChartField Creation

4. Click > **Approval Chain**
5. Click > **+** icon next to **Pending**

6. Enter > **User I**D of Approver you would like to add
7. Click > **Insert**
8. Verify > **Adhoc Approver** has been added to the Approval Chain
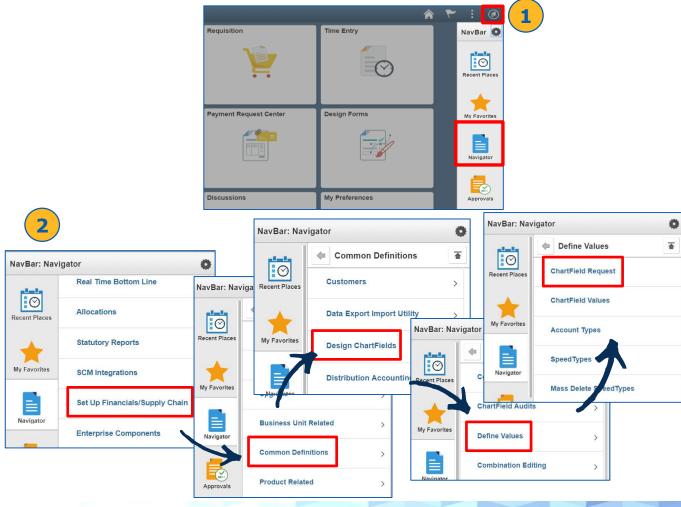
Maintain ChartFields

View Comments and Re-Submit Request

The Requestor will receive an **email notification** if a request is denied. The Requestor should view the approver's comments, make any changes needed, and re-submit the request for approval.

1. Click > **NavBar** icon > **Navigator**
2. Click > **Setup Financials/Supply Chain** > **Common Definitions > Design ChartFields > Define Values > ChartField Request**
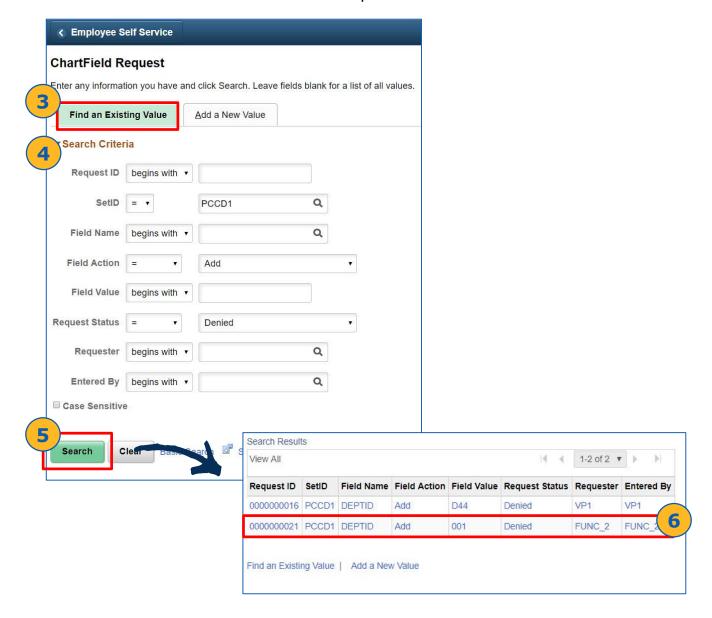
Maintain ChartFields

View Comments and Re-Submit Request

3. Click > **Find an Existing Value**
4. Enter > **Search Criteria**
5. Click > **Search**
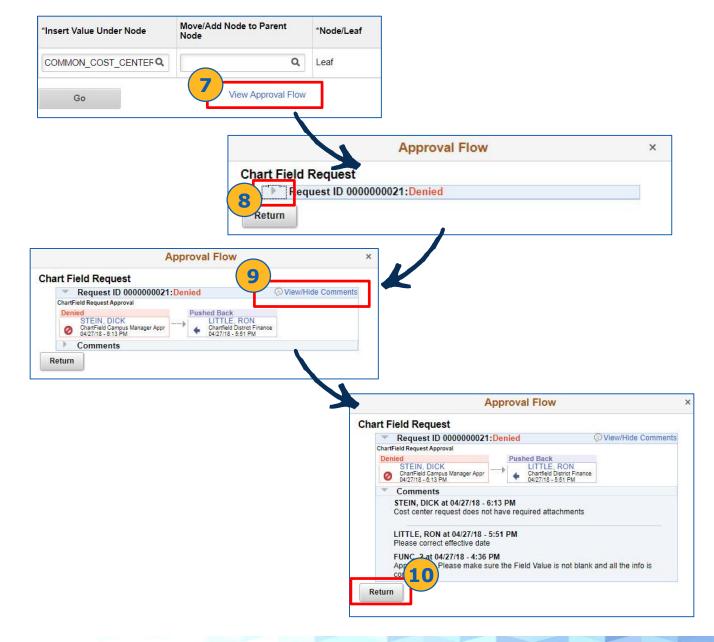6. Scroll down and select the denied request

Maintain ChartFields

View Comments and Re-Submit Request

7. Click > **View Approval Flow**
8. Click > **ChartField Request Dropdown**
9. Click > **View/Hide Comments**
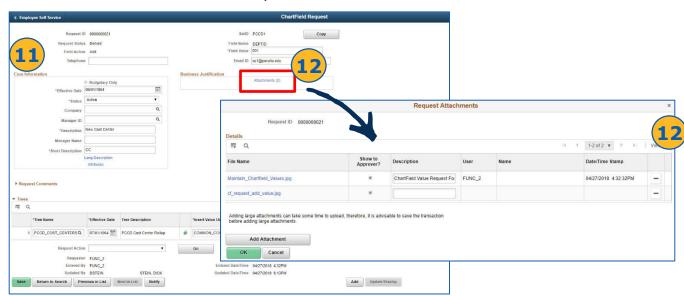10. Review Comments, Click > **Return**

Maintain ChartFields

View Comments and Re-Submit Request

11. Update > **Fields** as required by denial comments
12. Add > **Attachments** if requested

13. Enter > **Request Comments**, including which fields were changed
14. Select > **Submit for Approval** as Request Action
15. Click > **Go**. The Request will be re-routed to the approver who denied it.