

# Maintain ChartFields

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

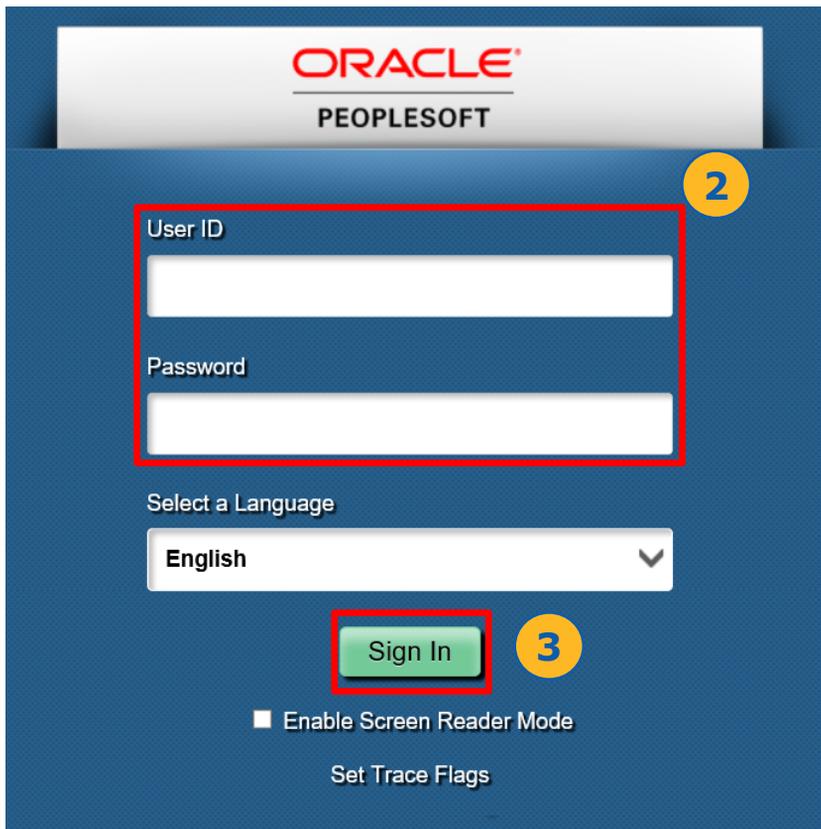
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# Log on to ONEPeralta

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**



The screenshot shows the Oracle PeopleSoft login interface. At the top, the Oracle and PeopleSoft logos are displayed. Below the logos, there are two input fields: 'User ID' and 'Password'. A red box highlights these two fields, with a yellow circle containing the number '2' next to it. Below the input fields is a 'Select a Language' dropdown menu with 'English' selected. A green 'Sign In' button is highlighted with a red box, and a yellow circle containing the number '3' is next to it. Below the button, there is a checkbox for 'Enable Screen Reader Mode' and a link for 'Set Trace Flags'.



### 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)

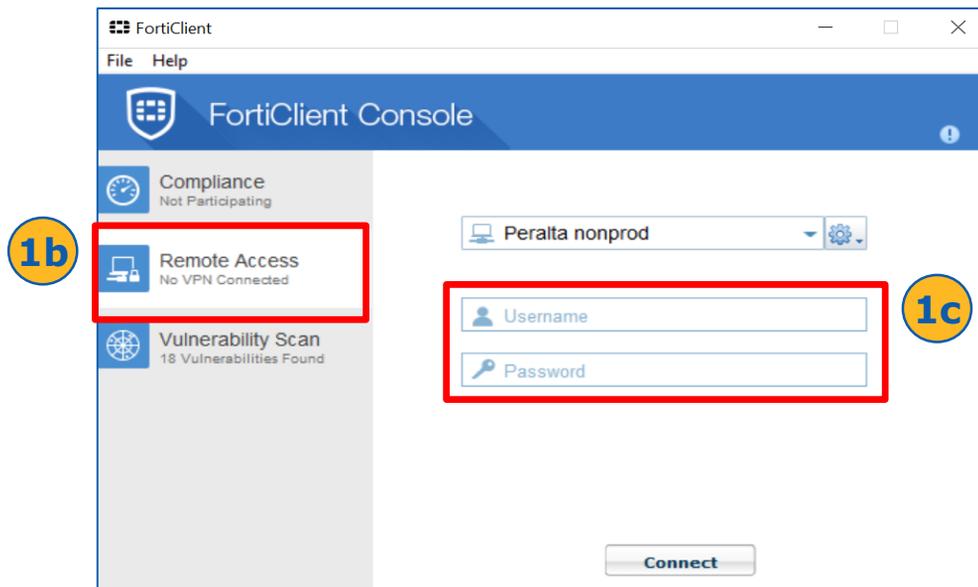
## Turn on VPN

### All ONEPeralta Users

If you are having trouble logging into 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**



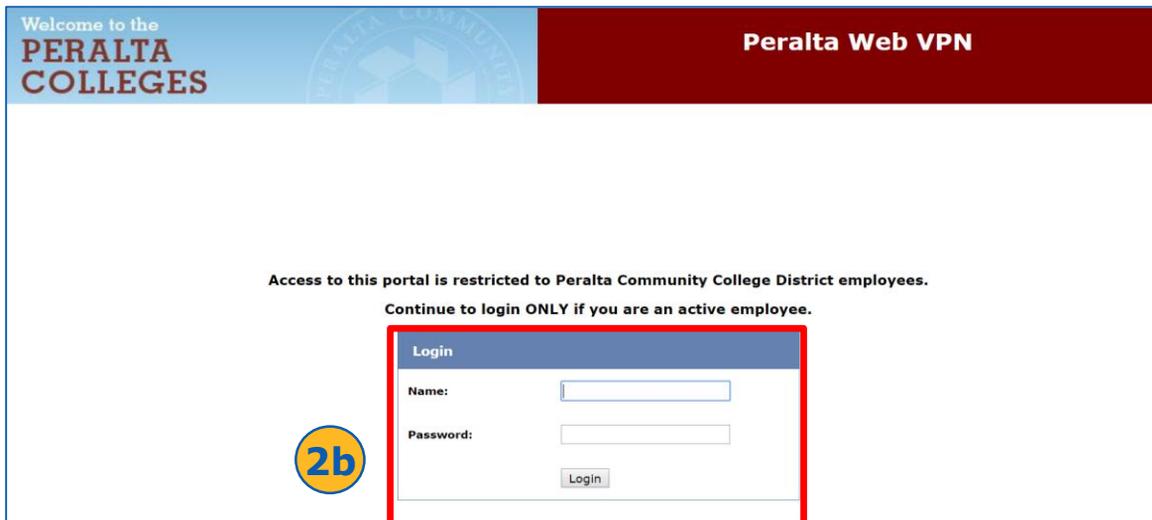
# Log on to ONEPeralta (cont'd)

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**



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:

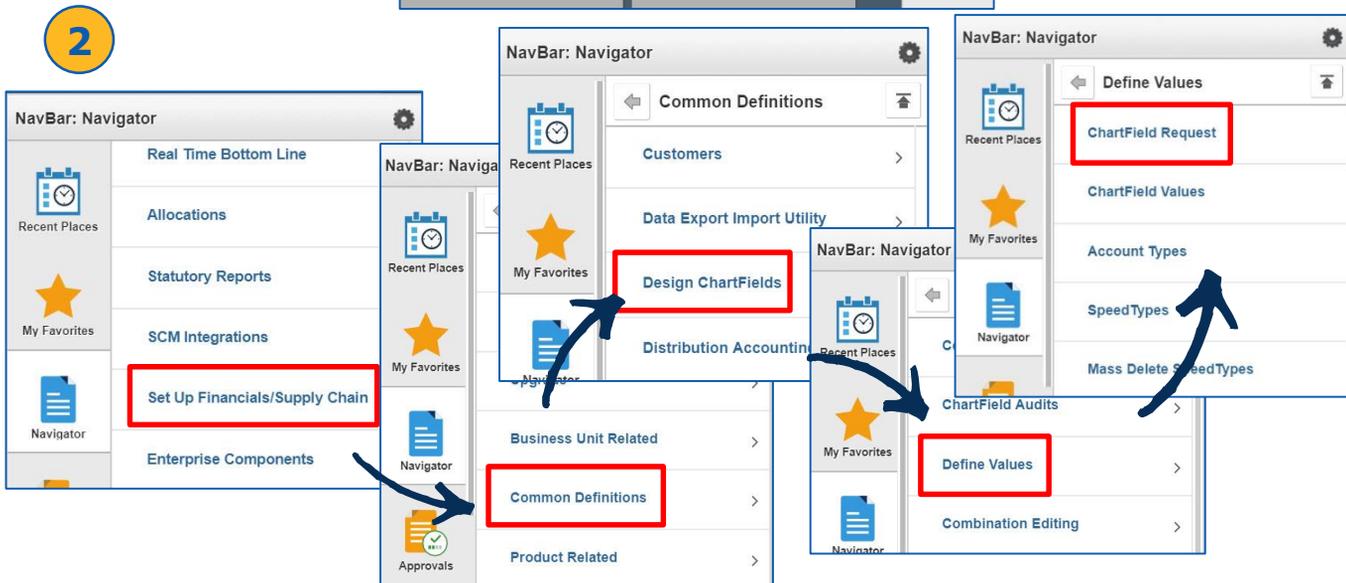
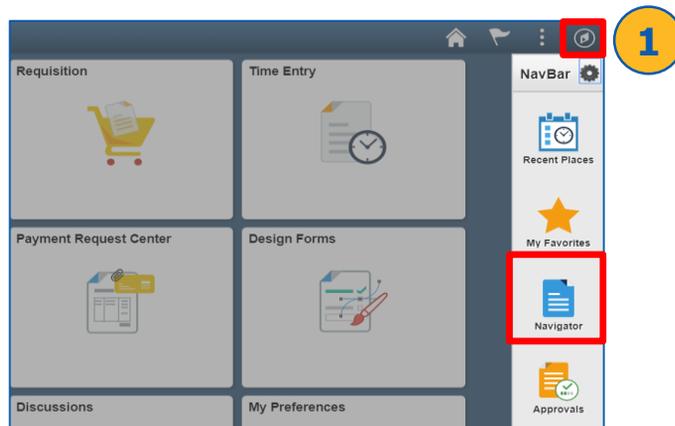
Login

# 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**

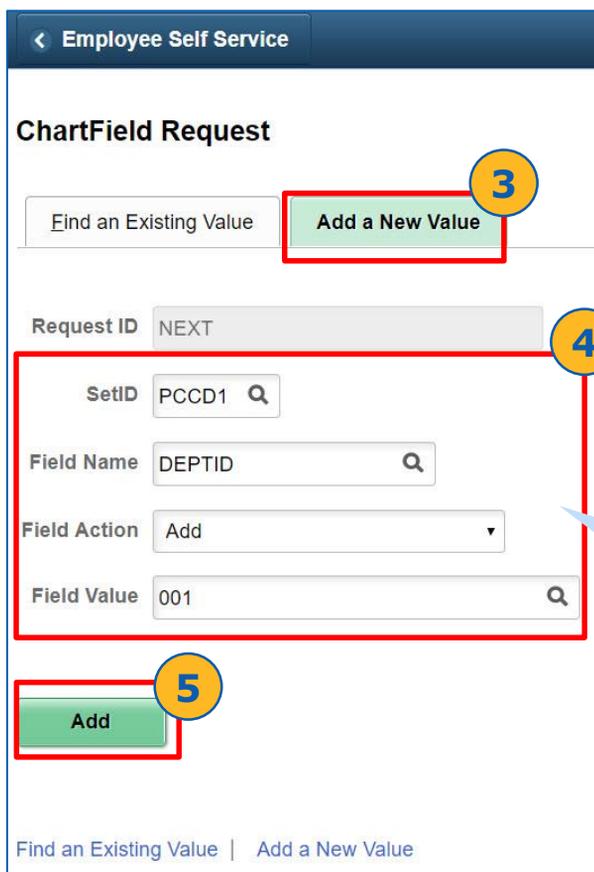


# Maintain ChartFields

## 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.



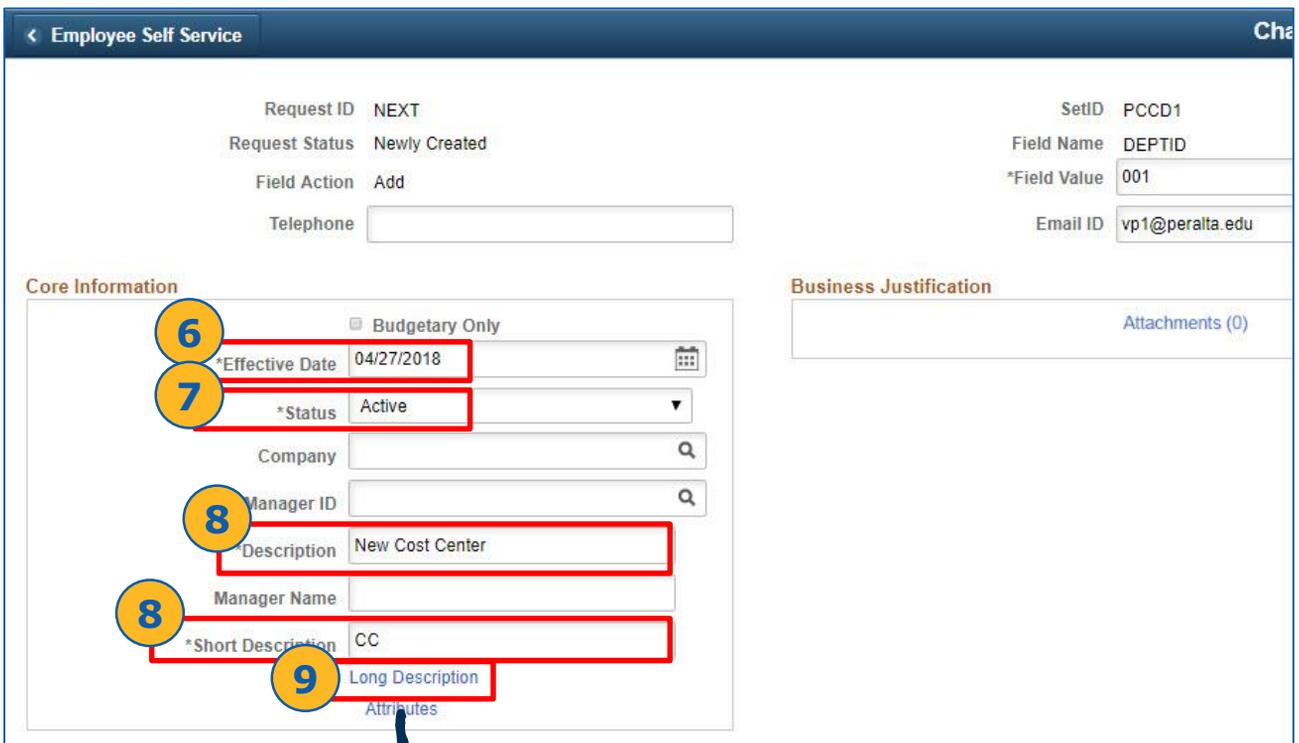
The screenshot shows the 'Employee Self Service' interface for 'ChartField Request'. It features a navigation bar with a back arrow and the text 'Employee Self Service'. Below the title, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box and a yellow circle containing the number 3. Below this, there is a 'Request ID' field with the value 'NEXT' and a yellow circle containing the number 4. A large red box encloses the main form fields: 'SetID' (PCCD1), 'Field Name' (DEPTID), 'Field Action' (Add), and 'Field Value' (001). At the bottom left, there is an 'Add' button highlighted with a red box and a yellow circle containing the number 5. At the very bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

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

# 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**

**ChartField Request**

SetID PCCD1  
 Field Name DEPTID  
 \*Field Value 001  
 Email ID vp1@peralta.edu

**10** Attachments (0)

**Request Attachments**

Request ID NEXT

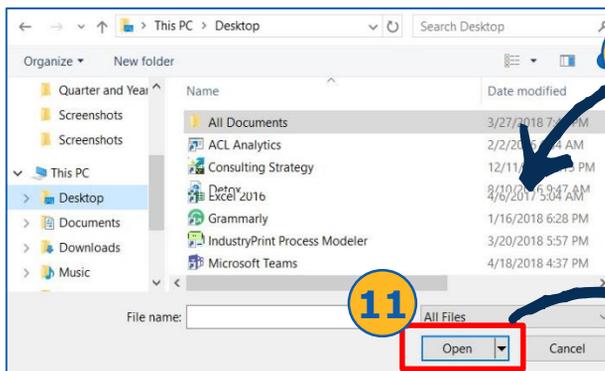
**Details**

File Name	Show to Approver?	Description	User	Name
View	<input checked="" type="checkbox"/>			

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

**10** Add Attachment

OK Cancel



**File Attachment**

Choose File No file chosen

Upload Cancel

**File Attachment**

Choose File Maintain Cha... Values.jpg

**11** Upload

Cancel

**Details**

File Name	Show to Approver?	Description
Maintain_Chartfield_Values.jpg	<input checked="" type="checkbox"/>	<b>12</b> ChartField Value Request Form

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

**13** Add Attachment

OK Cancel

# Maintain ChartFields

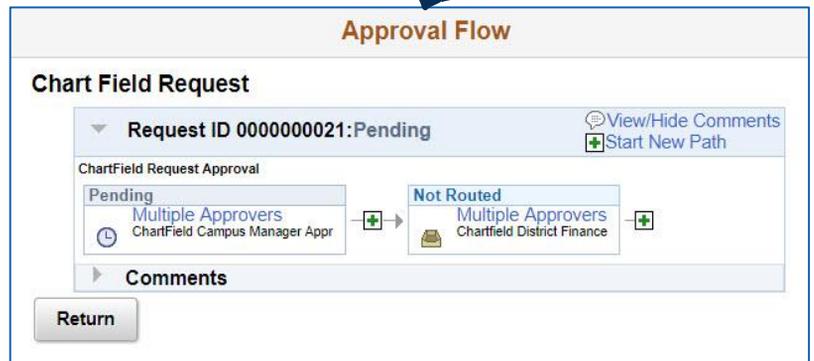
## Request to Create / Update ChartField Values

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

The screenshot shows the 'Trees' form interface. At the top, there is a search bar and a 'Trees' dropdown menu highlighted with a red box. Below this is a table with the following columns: \*Tree Name, \*Effective Date, Tree Description, \*Insert Value Under Node, Move/Add Node to Parent Node, and \*Node/Leaf. The first row contains the value '1' in the \*Tree Name column and 'PCCD Cost Center Rollup' in the Tree Description column. Below the table, there are fields for Requester, Entered By, Updated By, Entered Date/Time, and Updated Date/Time. At the bottom, there are 'Save' and 'Notify' buttons, and an 'Add Update/Display' button.

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

The screenshot shows the 'Request Comments' form. A red box highlights the 'Request Comments' text area, with a blue circle containing the number '14' next to it. Below the text area is a table with columns: \*Tree Name, \*Effective Date, Tree Description, \*Insert Value Under Node, Move/Add Node to Parent Node, \*Node/Leaf, Auto Update, and Update Status. The first row contains 'ST\_CENTERS Q', '07/01/1994', 'COMMON\_COST\_CENTERQ', and 'Leaf'. Below the table, there is a 'Request Action' dropdown menu with 'Submit for Approval' selected, and a 'Go' button. A blue circle containing the number '15' is next to the dropdown, and another blue circle containing the number '16' is next to the 'Go' button. Below the 'Go' button, there is a 'View Approval Flow' button. A blue circle containing the number '17' is next to the 'View Approval Flow' button. Arrows point from the 'Go' button to the 'View Approval Flow' button.



# 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

The screenshot illustrates the approval workflow for ChartField creation. It shows the NavBar with the Approvals icon (1), the Pending Approvals section with the Field Request list (2), and the detailed view of a Field Request (3) which includes a summary, tree information, and attachments (4).

Tree Name	Description	Effective Date	Tree Note	Parent Node	NodeLeaf
PCCD_COST_CENTERS	Test	07/01/1964	COMMON_COST_CENTER		LEAF

# Maintain ChartFields

## Approve / Deny / Pushback ChartField Creation

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

Sequence	Attached File	Description	Created By
1	Maintain_Chartfield_Values.jpg	ChartField Value Request Form	

**Approval Chain**

Chart Field Request

Request ID 000000021 Pending

**Start New Path**

**ChartField Request Approval**

- Pending +
- Multiple Approvers  
ChartField Campus Manager Appr >
- Not Routed +
- Multiple Approvers  
Chartfield District Finance >

**Comments**

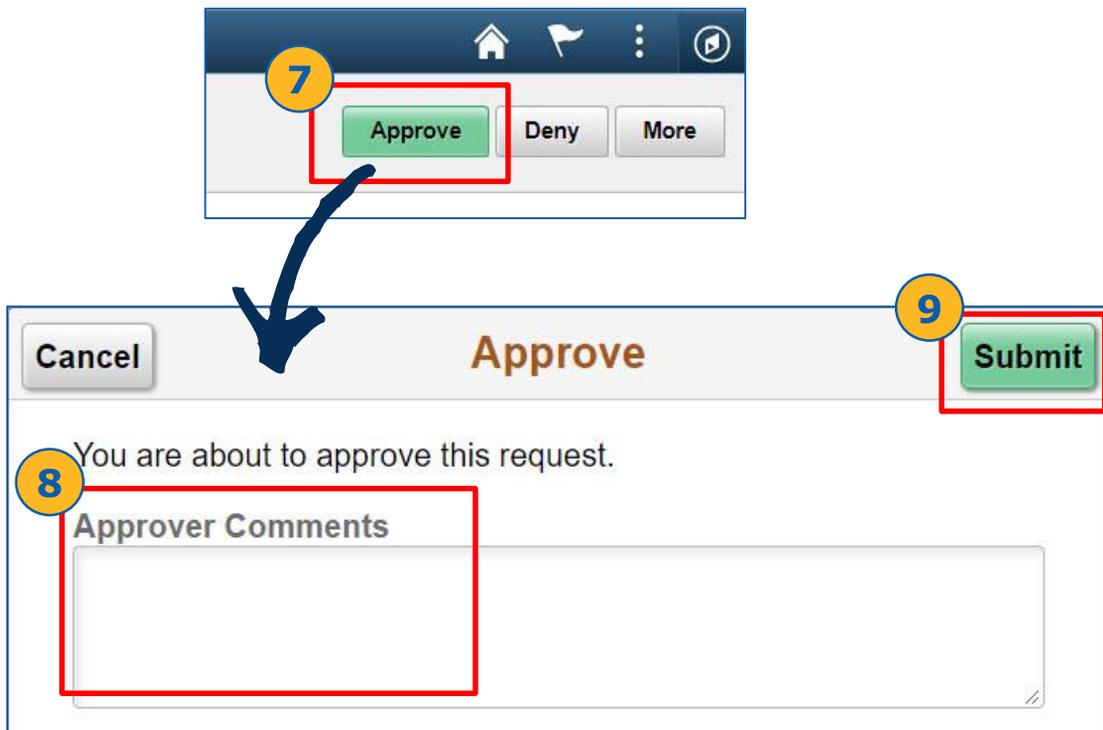
**FUNC\_2 at 04/27/18 - 4:36 PM**  
Approver(s): Please make sure the Field Value is not blank and all the info is correct!

# Maintain ChartFields

## Approve / Deny / Pushback ChartField Creation

### Approve

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



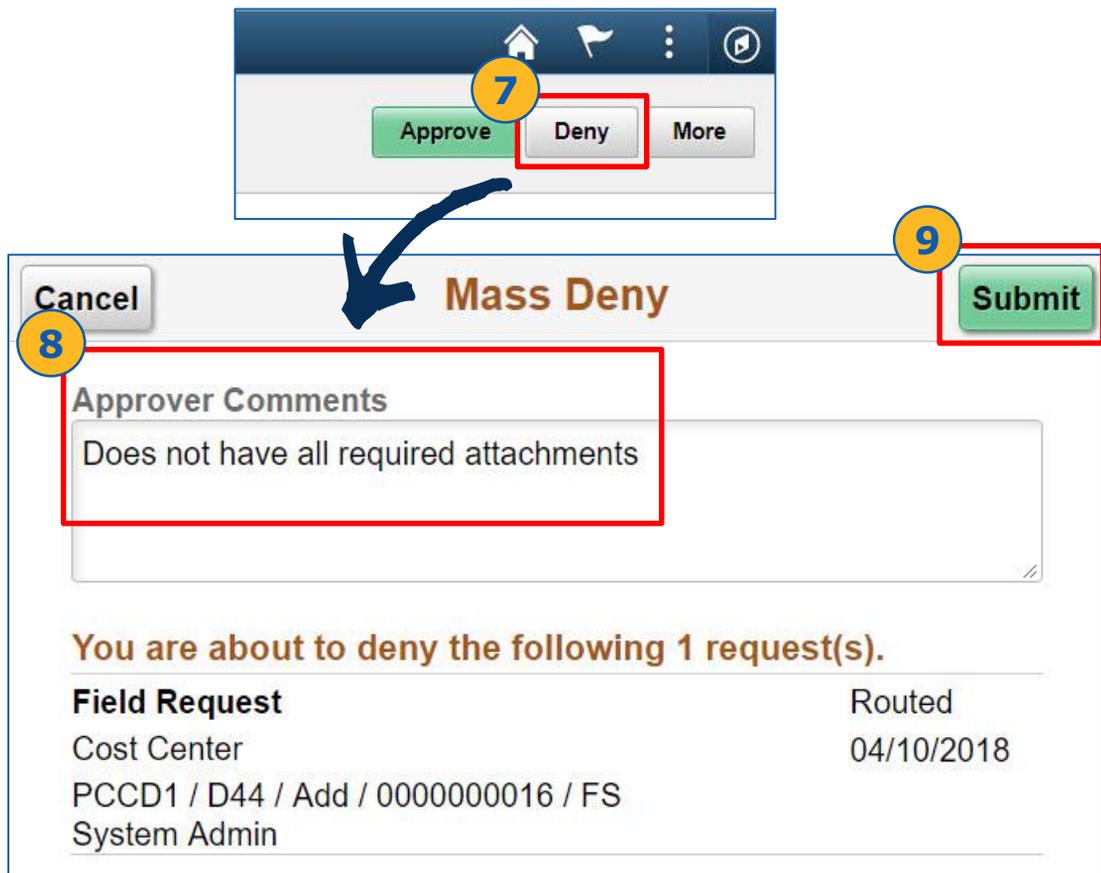
# Maintain ChartFields

## 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**



Cancel **Mass Deny** Submit

**8** Approver Comments  
Does not have all required attachments

**9**

**You are about to deny the following 1 request(s).**

<b>Field Request</b>	Routed
Cost Center	04/10/2018
PCCD1 / D44 / Add / 0000000016 / FS	
System Admin	

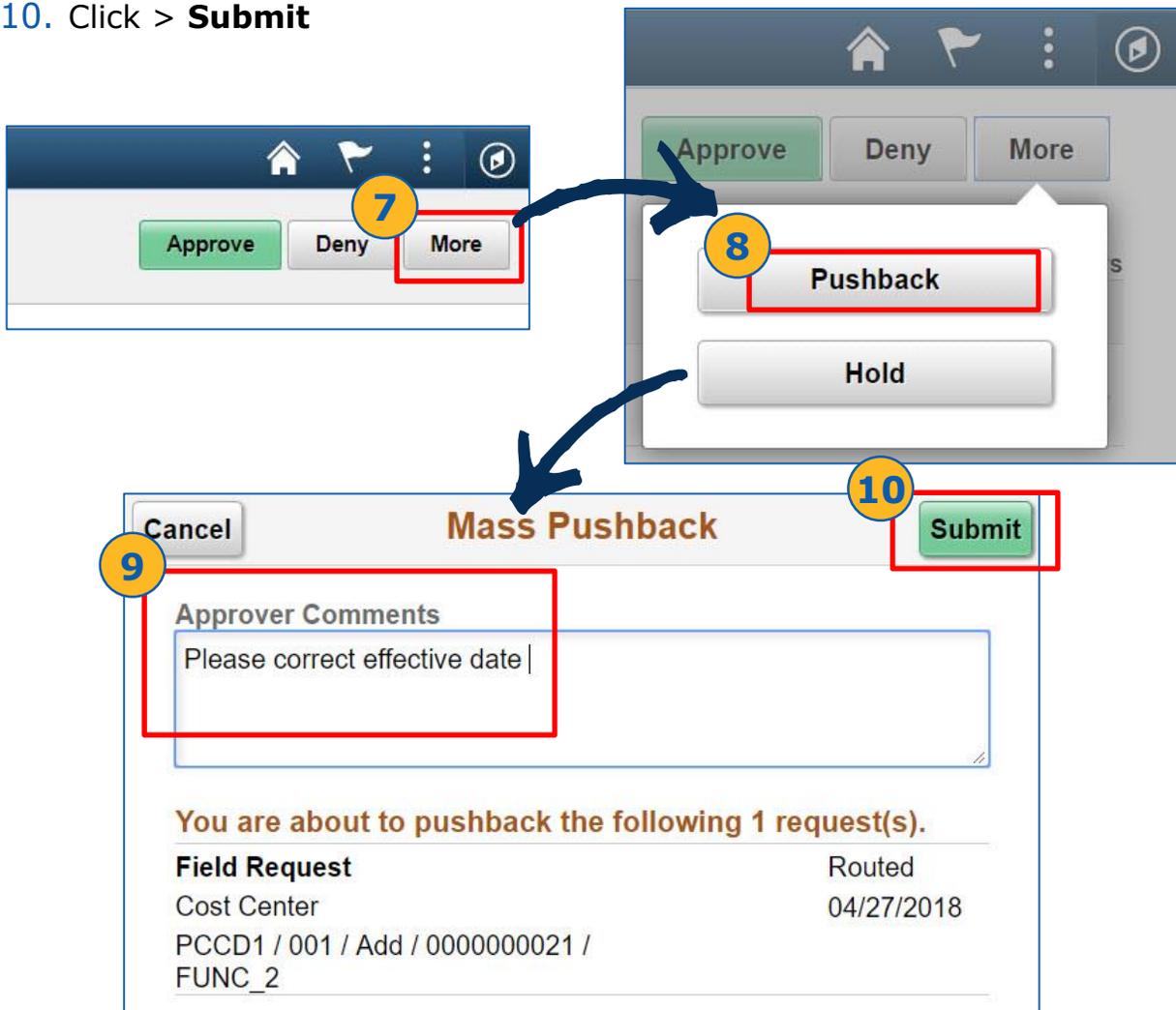
# Maintain ChartFields

## 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**



**Approver Comments**  
Please correct effective date |

**You are about to pushback the following 1 request(s).**

<b>Field Request</b>	Routed
Cost Center	04/27/2018
PCCD1 / 001 / Add / 0000000021 / FUNC_2	

# 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

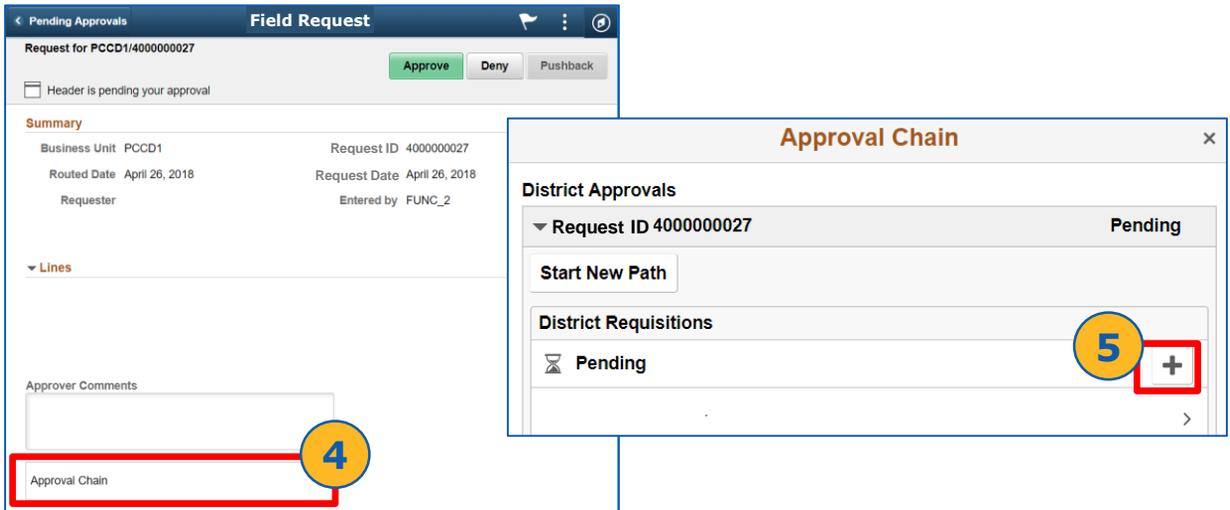
The screenshot shows the 'Employee Self Service' interface. The top navigation bar includes 'Pending Approvals' and buttons for 'Approve', 'Deny', and 'More'. The left sidebar shows a 'View By' dropdown set to 'Type' and a list of categories: 'All', 'Field Request', and 'Field Request'. The 'Field Request' category is highlighted with a red box and a blue circle containing the number '2'. A blue arrow points from this category to the main content area. The main content area displays a list of pending approvals. The first row is highlighted with a red box and a blue circle containing the number '3'. The list includes the following items:

Field Request	Project	Cost Center	Status	Date
Field Request	Project	FS System Admin	Routed	04/07/2018
Field Request	Cost Center	PCCD1 / D44 / Add / 0000000016 / FS System Admin	Routed	04/10/2018
Field Request	Cost Center	PCCD1 / D78 / Add / 0000000020 / FS System Admin Pushed Back by LITTLE, RON	Routed	04/16/2018
Field Request	Project	PCCD1 / P887 / Add / 0000000019 / FS System Admin Pushed Back by LITTLE, RON	Routed	04/16/2018
Field Request	Cost Center	PCCD1 / 001 / Add / 0000000021 / FUNC_2	Routed	04/27/2018

# Maintain ChartFields

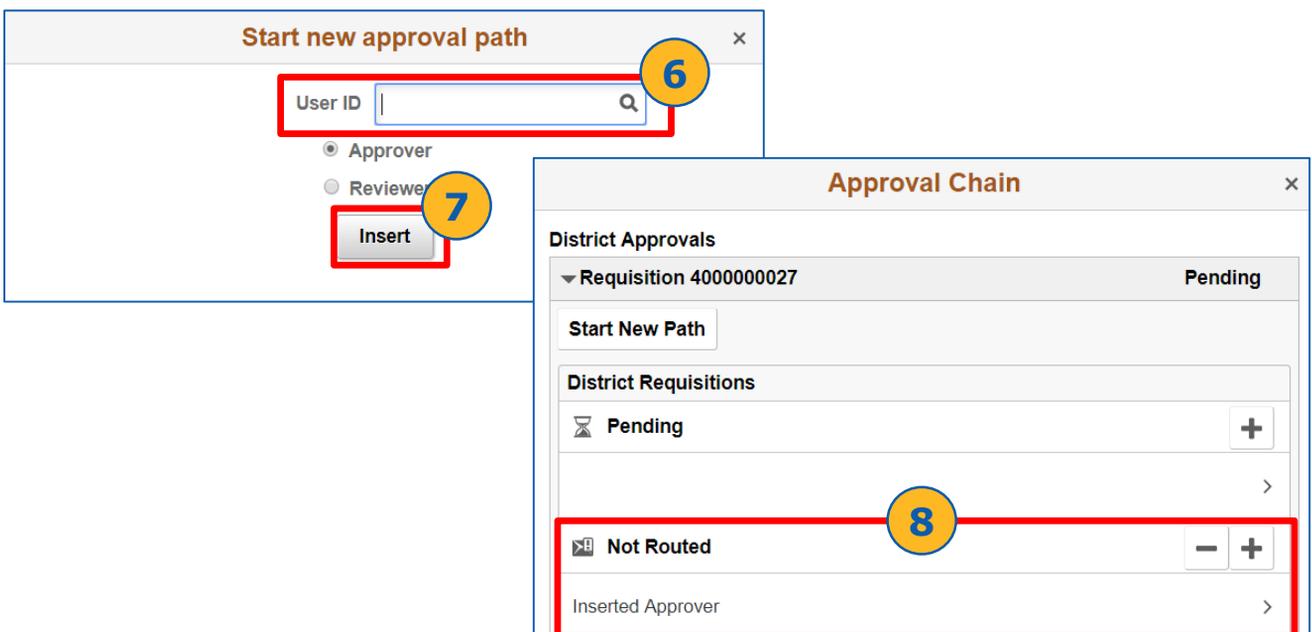
## Approve / Deny / Pushback ChartField Creation

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



The screenshot shows the 'Field Request' interface for request ID 4000000027. In the 'Approval Chain' modal, the 'District Requisitions' section shows a 'Pending' status with a red box and a yellow circle containing the number 5 around the plus icon. In the main 'Field Request' view, the 'Approval Chain' link is highlighted with a red box and a yellow circle containing the number 4.

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



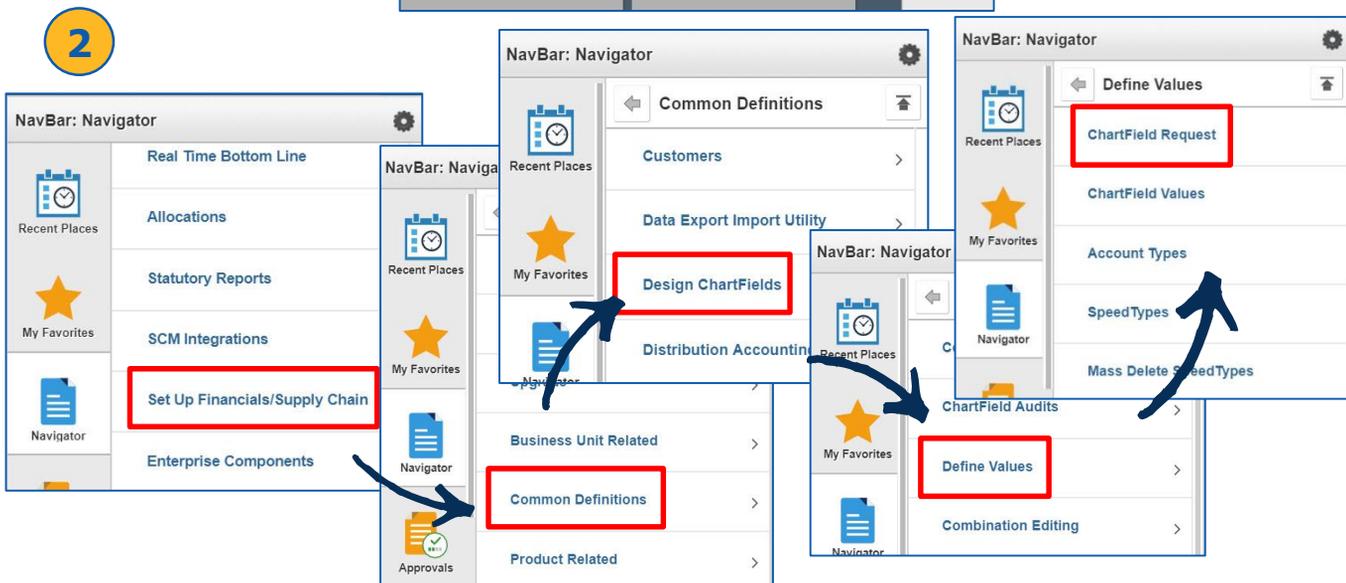
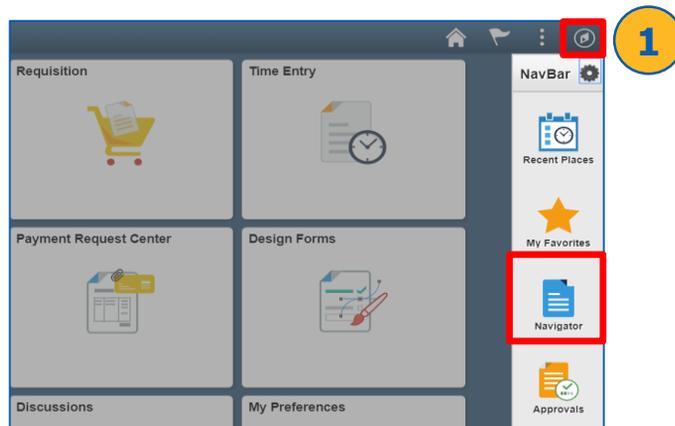
The screenshot shows the 'Start new approval path' modal with a 'User ID' search field highlighted by a red box and a yellow circle with the number 6. Below it, the 'Approver' radio button is selected, and the 'Insert' button is highlighted with a red box and a yellow circle with the number 7. The 'Approval Chain' modal shows the 'District Requisitions' section with a 'Pending' status and a plus icon. Below it, the 'Not Routed' status is highlighted with a red box and a yellow circle with the number 8.

# 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

<
Employee Self Service

### ChartField Request

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

3 Find an Existing Value
Add a New Value

4 Search Criteria

Request ID begins with

SetID = PCCD1 Q

Field Name begins with  Q

Field Action = Add v

Field Value begins with

Request Status = Denied v

Requester begins with  Q

Entered By begins with  Q

Case Sensitive

5 Search
Clear

Search Results

View All 1-2 of 2

Request ID	SetID	Field Name	Field Action	Field Value	Request Status	Requester	Entered By
0000000016	PCCD1	DEPTID	Add	D44	Denied	VP1	VP1
0000000021	PCCD1	DEPTID	Add	001	Denied	FUNC_2	FUNC_2

Find an Existing Value | Add a New Value

# 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**

*Insert Value Under Node	Move/Add Node to Parent Node	*Node/Leaf
COMMON_COST_CENTEF		Leaf
<input type="button" value="Go"/>	<input type="button" value="View Approval Flow"/>	

**Approval Flow**

**Chart Field Request**

Request ID 0000000021: Denied

**Approval Flow**

**Chart Field Request**

Request ID 0000000021: Denied

ChartField Request Approval

Denied STEIN, DICK ChartField Campus Manager Appr 04/27/18 - 6:13 PM → Pushed Back LITTLE, RON ChartField District Finance 04/27/18 - 5:51 PM

Comments

**Approval Flow**

**Chart Field Request**

Request ID 0000000021: Denied

ChartField Request Approval

Denied STEIN, DICK ChartField Campus Manager Appr 04/27/18 - 6:13 PM → Pushed Back LITTLE, RON ChartField District Finance 04/27/18 - 5:51 PM

Comments

STEIN, DICK at 04/27/18 - 6:13 PM  
Cost center request does not have required attachments

LITTLE, RON at 04/27/18 - 5:51 PM  
Please correct effective date

FUNC\_2 at 04/27/18 - 4:36 PM  
App Please make sure the Field Value is not blank and all the info is co

# 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.

*Tree Name	*Effective Date	Tree Description	*Insert Value Under Node	Move/Add Node to Parent Node	*Node/Leaf
1 PCCD_COST_CENTERS	07/01/1964	PCCD Cost Center Rollup	COMMON_COST_CENTEF		Leaf